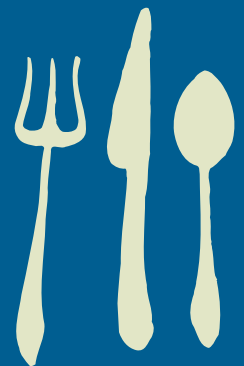


Dining & Entertainment

STATISTICAL SUMMARY OF THE SALT LAKE MARKET



INTRODUCTION AND METHODOLOGY

Advertising is essential in today's competitive business climate — and market research is crucial for developing cost-effective advertising plans. The information contained in this statistical summary is intended to give you added confidence when making the important marketing decisions that guide the future of your business.

At Newspaper Agency Corporation, we commission in-depth studies of the Salt Lake market to arm our advertisers with superior information about the shopping activities of Salt Lake's consumers. Included in this statistical summary is the most up-to-date information available on the Salt Lake market from the best possible sources. The mainstay of our on-going research program is the 1999 Survey of the Salt Lake Primary Market conducted by Belden Associates, an independent, nationally recognized firm devoted to market research. Belden Associates enjoys a reputation for having the highest technical standards in the industry.

The 1999 study highlights shopping and purchasing behavior, intentions and attitudes of adults in the Salt Lake primary market area (comprised of 628,000 adults in Salt Lake and southern Davis counties). A random sample survey design included an in-depth phone interview of 1,205 respondents, followed by a mailed self-administered questionnaire. Superior information about Salt Lake's consumers will enhance your position in the market and ensure *The Salt Lake Tribune* and *Deseret News* are a part of your successful advertising plan — in other words, our success depends on your success.

At Newspaper Agency Corporation, we are committed to maximizing the effectiveness of your advertising and bringing you the most for your investment. If you have any questions about this study and how your business can use this data to develop advertising strategies, please contact your account executive or NAC's Marketing and Research Department.

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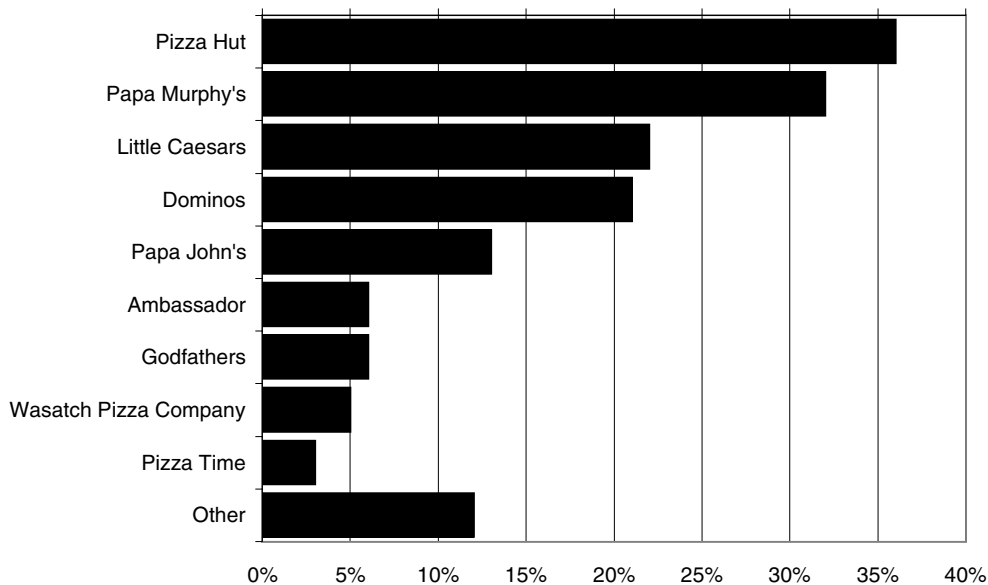
Sources: All information in this statistical summary is from the *Belden Associates, 1999 Survey of the Salt Lake Primary Market Area*, unless otherwise noted.



PIZZA RESTAURANT MARKET SHARE

	30-day total orders	30-day home delivery orders	30-day carry- out/dine-in orders
Pizza Hut	36%	28%	11%
Papa Murphy's	32%	6%	28%
Little Caesars	22%	6%	17%
Dominos	21%	19%	3%
Papa John's	13%	8%	6%
Ambassador	6%	5%	1%
Godfathers	6%	3%	4%
Wasatch Pizza Company	5%	3%	2%
Pizza Time	3%	3%	1%
Other	12%	3%	9%

How to read: 36 percent of adults have ordered from Pizza Hut in the last 30 days. Twenty-eight percent have ordered home delivery, and 11 percent have ordered for carry-out/dine-in.



PIZZA RESTAURANT DEMOGRAPHIC PROFILE

For adults who ordered pizza in the past 30 days.

	Market	Ambassador*	Dominos	Godfathers*	Little Caesars	Papa John's
Market Share						
Percentage of Adults	100%	6%	21%	6%	22%	13%
Number of Adults	628,000	38,200	128,600	39,600	135,200	78,500
Gender						
Male	49%	49%	49%	47%	42%	58%
Female	51%	51%	51%	53%	58%	42%
Age						
18-24	13%	23%	20%	14%	19%	18%
25-34	21%	28%	20%	25%	19%	29%
35-44	24%	28%	28%	37%	26%	22%
45-54	18%	11%	19%	12%	19%	20%
55-64	10%	6%	11%	11%	13%	8%
65 or Older	14%	5%	3%	1%	5%	3%
Homeownership						
Own	75%	72%	72%	73%	76%	76%
Rent	25%	28%	28%	27%	24%	24%
Marital Status						
Married	67%	64%	64%	84%	66%	61%
Single	18%	18%	22%	3%	21%	26%
Divorced	10%	14%	10%	10%	10%	10%
Widowed	5%	4%	4%	3%	3%	2%
Education Level						
Bachelor's Degree or Higher	32%	27%	26%	27%	30%	27%
Some College or Technical Training	33%	35%	31%	38%	32%	36%
High School Grad or Less	35%	38%	44%	35%	38%	38%
Occupation						
Executive, Professional, Technical	29%	26%	31%	33%	29%	35%
Sales, Clerical	24%	31%	30%	29%	27%	21%
Blue Collar	22%	26%	25%	24%	22%	28%
Retired	15%	9%	4%	4%	9%	5%
Homemaker	7%	3%	6%	8%	9%	6%
Not Employed	4%	5%	4%	3%	5%	5%
Household Income						
Below \$25,000	14%	10%	11%	13%	10%	15%
\$25,000 - \$34,999	17%	24%	16%	15%	21%	13%
\$35,000 - \$49,999	25%	26%	18%	26%	24%	25%
\$50,000 - \$74,999	24%	13%	29%	24%	25%	27%
\$75,000 or More	20%	28%	26%	22%	20%	21%
Readership						
Daily	55%	57%	57%	52%	54%	44%
Sunday	65%	63%	65%	56%	62%	54%

**small sample size; interpret with caution*

PIZZA RESTAURANT DEMOGRAPHIC PROFILE (CONTINUED)

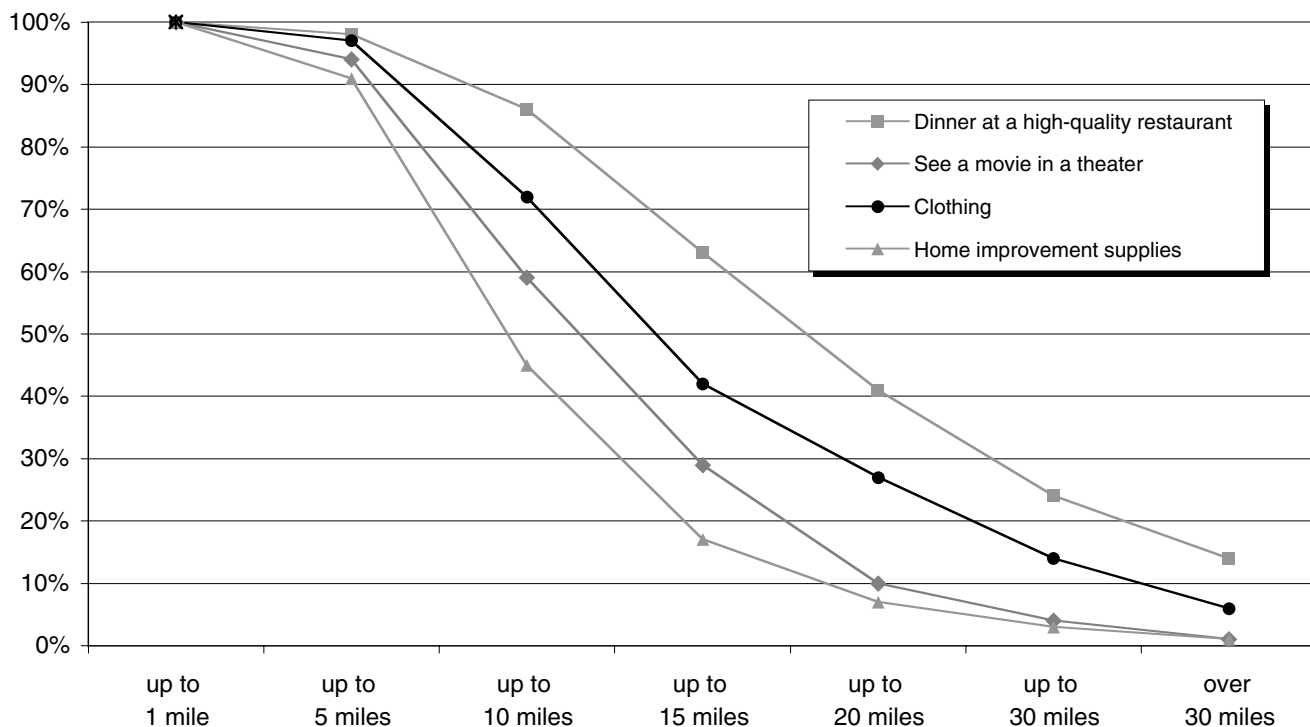
For adults who ordered pizza in the past 30 days.

	Market	Papa Murphy's	Pizza Hut	Pizza Time**	Wasatch Pizza Company*
Market Share					
Percentage of Adults	100%	32%	36%	3%	5%
Number of Adults	628,000	198,200	223,600	19,800	32,200
Gender					
Male	49%	54%	51%	63%	65%
Female	51%	46%	49%	37%	35%
Age					
18-24	13%	13%	21%	26%	23%
25-34	21%	21%	24%	32%	36%
35-44	24%	29%	28%	17%	27%
45-54	18%	19%	15%	11%	2%
55-64	10%	7%	10%	9%	3%
65 or Older	14%	11%	2%	4%	8%
Homeownership					
Own	75%	76%	71%	54%	60%
Rent	25%	24%	30%	46%	40%
Marital Status					
Married	67%	73%	63%	50%	68%
Single	18%	16%	24%	44%	29%
Divorced	10%	7%	10%	7%	2%
Widowed	5%	4%	3%	ns	1%
Education Level					
Bachelor's Degree or Higher	32%	33%	25%	21%	39%
Some College or Technical Training	33%	33%	36%	13%	29%
High School Grad or Less	35%	34%	39%	66%	32%
Occupation					
Executive, Professional, Technical	29%	30%	30%	13%	38%
Sales, Clerical	24%	24%	30%	39%	22%
Blue Collar	22%	23%	24%	36%	25%
Retired	15%	11%	5%	8%	7%
Homemaker	7%	9%	7%	4%	4%
Not Employed	4%	3%	5%	22%	4%
Household Income					
Below \$25,000	14%	12%	12%	16%	11%
\$25,000 - \$34,999	17%	12%	16%	15%	13%
\$35,000 - \$49,999	25%	24%	26%	34%	22%
\$50,000 - \$74,999	24%	26%	26%	13%	15%
\$75,000 or More	20%	26%	21%	39%	39%
Readership					
Daily	55%	57%	50%	61%	55%
Sunday	65%	69%	61%	65%	62%

*small sample size; interpret with caution

**very small sample size; interpret with extreme caution

DISTANCE SHOPPERS ARE WILLING TO TRAVEL



Type of Shopping Trip	Distance Willing to Travel in Miles						
	up to 1 mile	up to 5 miles	up to 10 miles	up to 15 miles	up to 20 miles	up to 30 miles	over 30 miles
Dinner at a high-quality restaurant	100%	98%	86%	63%	41%	24%	14%
See a movie in a theater	100%	94%	59%	29%	10%	4%	1%
Clothing	100%	97%	72%	42%	27%	14%	6%
Home improvement supplies	100%	91%	45%	17%	7%	3%	1%

How to read: 6 percent of adults are willing to travel up to 10 miles to dine at a high-quality restaurant. Only 14 percent are willing to travel over 30 miles.
Note: Shopping distances for clothing and home improvement supplies are shown for comparison.

RESTAURANT PATRONAGE

For adults in the past 30 days.

	Number of adults	Percent of adults	Average number of visits per adult
Ate at a sit-down restaurant	567,300	90%	5.7
Ate at a fast-food restaurant	549,700	88%	6.8
Ordered take-out food or had food delivered to home	461,900	74%	3.2

LEISURE ACTIVITIES

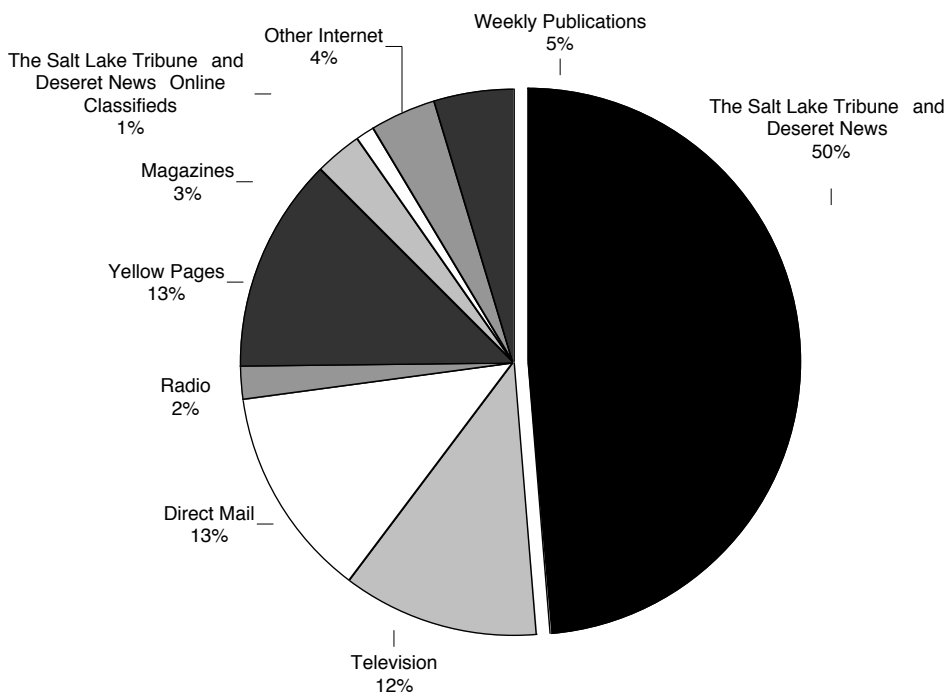
For adults in the past 30 days.

	Number of adults	Percent of adults	Average number of times per adult
Rented a video	392,600	63%	4.4
Went to a movie	337,100	54%	2.4
Attended a live entertainment event (ballet, theatre, symphony, etc.)	191,000	30%	2.0
Attended a popular music concert	79,000	13%	1.7
Attended a professional or college sporting event	139,900	22%	2.3

PRICE-QUALITY PREFERENCES FOR ENTERTAINMENT

	Percent of adults who are quality-conscious	Percent of adults who are price-conscious
Entertainment	44%	56%
Eating out in the daily routine	29%	71%
Dining out on weekends	51%	49%

PREFERRED ADVERTISING SOURCE FOR ENTERTAINMENT



Note: Percentages may total more than 100 percent because some respondents chose more than one source.

NEWSPAPER AGENCY CORPORATION

ADVERTISING AGENT FOR THE SALT LAKE TRIBUNE AND DESERET NEWS

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