

HERALD-TRIBUNE MEDIA GROUP

Market Profile

SARASOTA | BRADENTON | VENICE | LAKEWOOD RANCH | NORTH PORT | ENGLEWOOD



WELCOME

Warm weather, powdery white beaches, year-round recreation and lively arts make the **Herald-Tribune Media Group** market one of the most attractive in the country.

Sarasota/Bradenton/Venice has prospered for decades on a steady stream of well-heeled retirees and a diverse group of service industries and young professionals to provide for their needs. We are now diversifying with a number of growing industries such as health care, financial services, manufacturing, digital arts and niche technology sectors. The pace of growth has begun to revive, and baby boom retirement promises to quicken it further.

Since 1925, through good times and bad, the **Pulitzer Prize-winning Herald-Tribune** has served Sarasota and Manatee counties with a commitment to community and journalistic excellence that has attracted quality readers who become quality customers for its advertisers.

The **Herald-Tribune Media Group** includes **HeraldTribune.com**, the market's largest media Internet site, and nearly a dozen niche sites – each with a mobile counterpart – including *TicketSarasota*, *ArtsSarasota*, *HTPreps*, *Inside Real Estate* and *HT Health*.

At the core is the **Herald-Tribune**, with four daily editions which are enhanced by signature products – *Business Weekly*, *Health+Fitness*, *Food & Wine*, *Ticket*, *At Home* and *Real Estate* – as well as unique publications that reflect our subtropical way of life such as *Style*, *Gulf Coast Welcome*, *Ticket+* and *Better Living*.

The **Herald-Tribune** also offers a quality audience beyond its subscriber base. *Yes!* on Sundays and *HT Select* on Wednesdays both go to thousands of non-subscribers in key zip codes.

Each year the **Herald-Tribune Media Group** also prints guides to local festivals, the arts, restaurants, medical services and recreation. We also sponsor community events from Parrish to Englewood.

The research summarized in this booklet is a comprehensive overview of this potent market and its media. It was conducted by Scarborough Research, the largest media research firm in the country.

Scarborough documents our resilient economy and shows you how the **Herald-Tribune Media Group** can put your business in touch with its spirited consumers in ways no other advertising investment can match.

We hope you will use this report and all our other resources to help your business thrive.

Sincerely,



Patrick Dorsey,
Publisher





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A WORD ABOUT SCARBOROUGH RESEARCH

Scarborough Research is America's largest multimedia research firm. On a continuing basis, it interviews more than 200,000 adults in the nation's largest markets, representing more than 80% of the U.S. population.

For the current report, Scarborough Research surveyed 1,409 adults in the Sarasota/Bradenton/Venice market by telephone and mail about their demographic characteristics, shopping behavior and media use.

The sample was designed using a random selection of telephone households and respondents within households. The results were weighted and projected to the total adult population. Statistical tolerance for the total sample is +/-3.2 percentage points. The Media Ratings Council accredits the results.

For information about advertising opportunities, contact your **Herald-Tribune Media Group** account executive at (941) 361-4000. For more on the market and local media, call our Research Department at (941) 361-4151.

Sources: Scarborough Research 2014, Alteryx 2014, Frank N. Magid & Associates 2011, Alliance for Audited Media 2014. Omniture 2014 12 month average. Sarasota/Bradenton/Venice is Sarasota and Manatee counties.

A COMPELLING MARKET

Ranked among America's best small cities, best places to retire and best places to do business, Sarasota is the heart of Sarasota/Bradenton/Venice – one of the wealthiest major metro markets in the country.

With more than 700,000 residents, this sparkling slice of Gulf Coast is Florida's fifth largest market. Stretching south from Tampa Bay through Sarasota and Manatee counties, it continues to lure people with its outstanding quality of life.

From its celebrated beaches and rich circus legacy to dozens of music, movie and theater venues, galleries, golf courses and public parks, hundreds of fine restaurants, a top-flight rowing facility, even a polo pitch, Sarasota is irresistible.

Among Florida's 10 largest markets, it has the highest per capita income and is renowned for excellence in higher education.

It is home to Ringling College of Art & Design, the premiere design school in the Southeast, and New College of Florida, the state's honors college, rated year after year as one of the best values in America for higher education.

This year, we welcome the Mall at University Town Center to our community. It is a \$315 million project that will serve as a luxury retail hub for Southwest Florida. The two-story mall is the only upscale enclosed mall that opened in the United States in 2014, bringing new retail and dining to an already thriving business climate.

The **Herald-Tribune Media Group** chronicles this diverse and dynamic world every day, helping local people and local businesses build a successful future.



MAJOR MARKET RETAILERS

Department Stores

Bealls
Dillards
JCPenney
Kohl's
Macy's
Saks Fifth Avenue
Sears
Stein Mart
Target

Clothing

Ann Taylor
Anthropologie
Banana Republic
Brooks Brothers
Chico's
H&M
JoS. A. Bank
Lululemon
Marshall's
Nordstrom Rack
Ross Dress for Less
Talbots
The Limited
Victoria's Secret
White House Black Market

Cosmetics

Keihl's
MAC Cosmetics
Sephora
Ulta

Shoes

Famous Footwear
New Balance
Payless ShoeSource
Peltz Shoes
Rack Room Shoes
Shoe Carnival
Stuart Weitzman

Discount Stores

BJ's Wholesale Club
Costco
Kmart
Sam's Club
Wal-Mart

Sporting Goods & Toys

Champs Sports
Dick's Sporting Goods
Sports Authority
Toys R Us

Home Furnishings

American Signature Furniture
Badcock Home Furniture
Bacon's Furniture
Baer's Furniture
Bed Bath & Beyond
Crate & Barrel
Ethan Allen
Furniture Warehouse
Haverty's
HomeGoods
Kane's Furniture
La-Z-Boy Furniture Galleries
Pier 1 Imports
Pottery Barn
Robb & Stucky
Rooms To Go
Savon Furniture
Williams-Sonoma

Home Improvement

DG Ace Hardware
Lowe's
The Home Depot
True Value

Office Supplies

Office Depot
Office Max
Staples

Electronics

Apple Store
Best Buy
hhgregg
Radio Shack

Hobbies & Crafts

Hobby Lobby
Jo-Ann Fabrics & Crafts
Michaels

Food & Grocery

Fresh Market
Publix
Trader Joe's
Whole Foods
Winn-Dixie

Drug Stores

CVS
Davidson's Drugs
Walgreen's

THE LARGEST LOCAL MULTI MEDIA PARTNER

The Herald-Tribune Media Group is the leader in reaching more than 280,000 local readers who are the most valuable consumers in Sarasota and Manatee counties. HeraldTribune.com and our suite of niche desktop and mobile sites generate an average of 900,000 unique visitors and 7.2 million page views every month.

The **Herald-Tribune**, Florida's eighth largest newspaper, has more readers than all local daily newspapers combined; more than all local weeklies and magazines combined; and already reaches many people who read other local publications.

HeraldTribune.com is the largest media Internet site in the market. It attracts 310,000 local Internet users – and thousands more from around the country and the world.

Two out of three people check newspapers or the Internet for advertising to guide their purchases. With the **Herald-Tribune Media Group**, you will be there when they do.

MEDIA AUDIENCES

Herald-Tribune Media Group 280,000

Local Dailies

Herald-Tribune	280,000
Bradenton Herald	163,000
Charlotte Sun	28,000
Tampa Bay Times	10,000

Weeklies & Shoppers

The Observer	53,000
Venice Gondolier Sun	20,000

Magazines

Style Magazine	43,000
Sarasota Magazine	35,000
SRQ	12,000
Scene Magazine	10,000

OTHER MEDIA

Local Broadcast News

WTVT FOX 13 (Tampa)	159,000
WWSB ABC 7	128,000
WFLA NBC 8 (Tampa)	104,000
WTSP CBS 10 (St Petersburg)	84,000
WFTS ABC 28 (Tampa)	44,000

Local Cable News

Bay News 9	111,000
SNN Suncoast News Network	74,000

Radio

WSRZ FM	111,000
WFLZ FM	81,000
WCTQ FM	68,000
WHPT FM	64,000
WUSF FM	59,000

Sources: Scarborough Research 2014, Omniture 2014, Alteryx 2014, Alliance for Audited Media 2014, SimilarWeb 2014



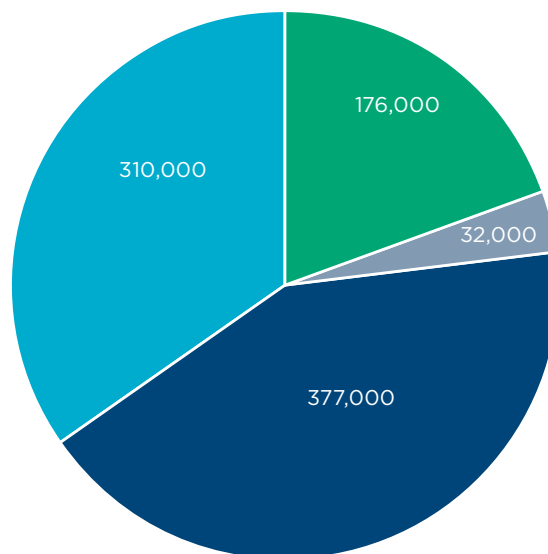
ONLINE

**HeraldTribune.com 900,000 Unique Visitors
7,200,000 Page Views**

Local Digital Sites

	UNIQUES	PAGE VIEWS
HeraldTribune.com	900,000	7,200,000
Bradenton.com	660,000	2,400,000
Xfinity/Comcast.net	570,000	1,600,000
MySuncoast.com	450,000	1,700,000
YourObserver.com	100,000	2,400,000
YourSun.com	20,000	2,600,000

HERALDTRIBUNE.COM Monthly Unique Visitors



■ Florida ■ Local ■ US ■ International

Source: Omniture 2014 - 12 month average

DIGITAL MARKETING SERVICES

The digital landscape is constantly changing. While, it used to be that the desktop computer was the main online platform, today smartphones and tablets are experiencing double-digit growth to become the media of choice for many users. Half of our digital traffic to HeraldTribune.com comes from tablet and mobile device users. These readers spend an average of 17 minutes on our site. We have the resources to research your industry, uncover short-term and long-term opportunities and advise you on the most effective solutions. Our Digital Marketing Services team will work closely with you to develop a plan that fulfills a solid digital strategy.

WEBSITE DEVELOPMENT

The first step to a strong digital presence is developing a website that accomplishes your business's objectives. Your website is your virtual storefront and should make it easy for your customers to understand what you have to offer.

MOBILE WEBSITE

A traditional website is not enough. Most consumers utilize a mobile device when they are out shopping and ready to make a purchase. Your mobile site should be readily accessible, easy to use and have simple one-click actions.

SEO, SEM, PPC

Just when you have figured out how to land your business on the first page of a Google search, Google will change everything. Managing your keywords and search terms is an ongoing strategy. Let our Digital Service team show you how to position your business in this competitive arena.

DIRECTORY SYNC

Controlling your business profile online is a 24-7 project. Directory sync keeps your business connected to the local environment with correct directories and listings management.

SOCIAL MANAGEMENT

Today, it is so important to drive social influence through listening, managing brand posts and inspiring your customers to engage with your business. A recommendation from a trusted peer has great reach in the form of reviews, photos, comments and blog posts. Our Digital Service team can create content that will spark a digital conversation with your customers through the development of business pages on social sites.

REACH/RETARGETING

Targeting your prospects who have searched for your keywords, visited your website and shown interest in your business is a powerful tool that can bring your business to the top of the list while consumers are making a purchase decision.

EMAIL MARKETING

Customize a highly targeted message to one of the market's most responsive audiences three times a day with email alerts. These consumers have requested to be the first to know about events and information in their community.

REPUTATION MONITORING

Everyone is sharing their opinions online. Businesses need to know what their customers are saying about them online. Our Digital Service Team can show you how to manage this communication and build your online reputation.

YAHOO!

Targeted advertising can help you find your best customers. Get the right message to the right person at the right time. People visit YAHOO! an average of 90 minutes every month.



AUDIENCE DEMOGRAPHICS

	Sarasota/Bradenton/Venice	Herald-Tribune Media Group	HeraldTribune.com
		Readership	Local Unique Visitors
TOTAL ADULTS	594,000	280,000 47%	310,000 52%

	Sarasota/Bradenton/Venice		Herald-Tribune Media Group			HeraldTribune.com		
	S/B/V	% MARKET	HERALD-TRIBUNE	% HT	INDEX	HT.COM	% HT.COM	INDEX
GENDER								
Men	282,000	47%	132,000	47%	101	149,000	47%	100
Women	312,000	53%	148,000	53%	99	165,000	53%	99
AGE								
18 to 44	188,000	32%	82,000	29%	91	142,000	46%	144
45 to 64	198,000	33%	89,000	32%	97	110,000	35%	106
65 or older	208,000	35%	109,000	39%	111	63,000	19%	54
Median Adult Age	56.8		59.7		105	47.5		84
HOUSEHOLD INCOME								
\$100,000 or more	104,000	18%	54,000	19%	106	78,000	25%	139
\$50,000 to \$99,999	178,000	30%	90,000	32%	107	110,000	35%	117
Up to \$50,000	312,000	52%	137,000	49%	94	126,000	40%	77
Average HH Income	\$66,000		\$68,000		103	\$77,000		117
EDUCATION								
College graduate or more	153,000	26%	82,000	29%	112	106,000	34%	131
Some college	179,000	30%	91,000	33%	110	130,000	41%	137
High school grad or less	262,000	44%	107,000	38%	86	79,000	25%	57
OCCUPATION								
Employed	288,000	48%	137,000	49%	102	193,000	62%	129
White collar	177,000	30%	89,000	32%	107	157,000	51%	170
Blue collar	111,000	19%	48,000	17%	89	35,000	11%	58
Retired/Other	306,000	52%	143,000	51%	98	118,000	38%	73
HOME OWNERSHIP								
Own	422,000	71%	212,000	76%	107	220,000	71%	100
Rent	173,000	29%	68,000	24%	83	94,000	29%	100
HOME VALUE								
\$500,000 or more	32,000	5%	20,000	7%	140	20,000	6%	120
\$250,000 to \$499,999	100,000	17%	56,000	20%	118	83,000	27%	159
Up to \$250,000	290,000	49%	137,000	49%	100	118,000	38%	78
Avg Home Value	\$243,000		\$264,000		109	\$278,000		114
TIME IN CURRENT HOME								
Up to 5 years	251,000	42%	113,000	40%	95	153,000	49%	117
5 years or more	344,000	58%	167,000	60%	103	157,000	51%	88
CHILDREN IN HOME								
Yes	156,000	26%	60,000	21%	81	91,000	29%	112
No	438,000	74%	220,000	79%	107	224,000	71%	96
Average HH Size	2.68		2.53		94	2.69		100

HERALD-TRIBUNE ADVERTISING ZONE PROFILES:

SARASOTA | BRADENTON | VENICE

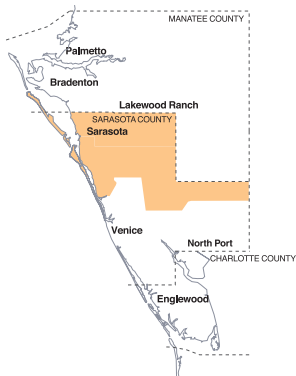


With an average annual circulation of 65,490 daily and 84,851 Sunday, rising seasonally to more than 92,000 daily and more than 120,000 Sunday, the **Herald-Tribune** is Florida's eighth largest newspaper.

Circulation in Sarasota/Bradenton/Venice is nearly double that of any other newspaper. Tampa newspapers reach less than two percent of all local households.

With targeted advertising zones and preprint delivery by zip code, the **Herald-Tribune** can deliver the market any way you want. And with *Yes!* on Sunday and *HT Select* on Wednesday, carrier-delivered to non-subscribers, you can reach up to 70% of all households in the most coveted zip codes every week.

Sources: Alteryx 2014, Alliance for Audited Media 52 weeks ended 12/31/13, Herald-Tribune internal reporting.



SARASOTA ZONE

Where: North Sarasota County, including Longboat Key, south to South Creek

		Occ HHs	H-T Dly	H-T Sun	% Dly	% Sun	
		104,560	31,961	38,696	31%	37%	
Seasonal Swing	Median Age	College Grad %	Average HH Size	Average HH Income	Median HH Income	% Own Home	Median Home Value
43%	51.6	27%	2.12	80,509	51,418	71%	198,912



VENICE/SOUTH ZONE

Where: Sarasota County south of South Creek, Charlotte County, Boca Grande in Lee County

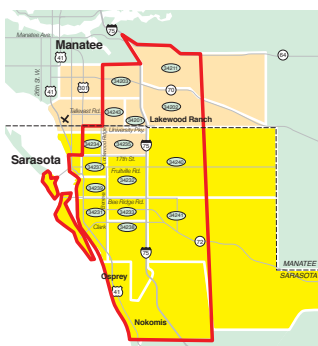
		Occ HHs	H-T Dly	H-T Sun	% Dly	% Sun	
		98,805	20,451	25,037	21%	25%	
Seasonal Swing	Median Age	College Grad %	Average HH Size	Average HH Income	Median HH Income	% Own Home	Median Home Value
61%	57.2	23%	2.14	66,036	47,589	80%	171,207



MANATEE ZONE

Where: Manatee County, except Longboat Key

		Occ HHs	H-T Dly	H-T Sun	% Dly	% Sun		
		145,232	13,702	16,396	9%	11%		
Seasonal Swing	Median Age	College Grad %	Average HH Size	Average HH Income	Median HH Income	% Own Home	Median Home Value	
39%	46.0	24%	2.33	65,931	45,549	70%	172,050	

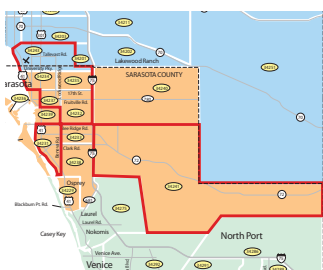


HT SELECT

When: Every Wednesday

Where: Select non-subscriber households in key Manatee and Sarasota zip codes.

- 11,200 Manatee Zone
- 25,450 Sarasota Zone
- 36,650 Full Run

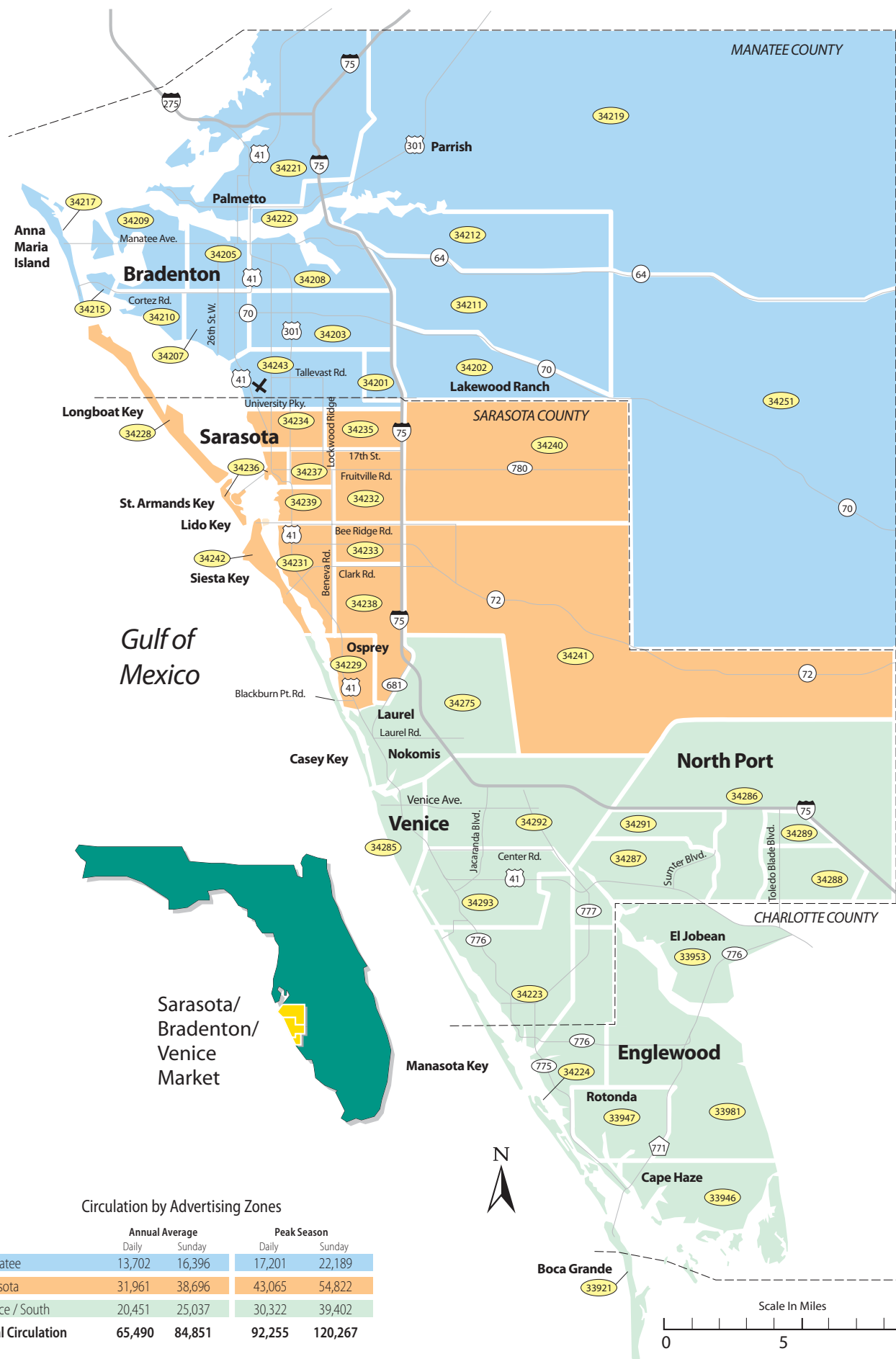


YES!

When: Every Sunday

Where: Select non-subscriber households in key Manatee and Sarasota zip codes.

Target: 15,000 opt-in households



ZIP CODE PROFILES: SARASOTA | BRADENTON | VENICE

Herald-Tribune

Key Demographics

Zip Code & Name	Occupied Households	Circulation Daily	Circulation Sunday	Household Reach Daily	Household Reach Sunday
Manatee Zone	145,232	13,702	16,396	9%	11%
Bradenton	114,618	6,473	7,940	6%	7%
34203 Oneco/Tara	15,144	1,438	1,853	9%	12%
34205 Bradenton	13,476	541	701	4%	5%
34207 Baysshore	15,045	666	758	4%	5%
34208 E Bradenton	11,950	416	551	3%	5%
34209 NW Bradenton	15,610	940	1,106	6%	7%
34210 El Conquistador	7,850	638	701	8%	9%
34215 Cortez	296	90	91	30%	31%
34217 Anna Maria	3,854	390	482	10%	13%
34219 Parrish	7,181	496	591	7%	8%
34221 Palmetto	16,019	467	561	3%	4%
34222 Ellenton	6,065	279	386	5%	6%
34251 Myakka City	2,128	112	159	5%	7%
New Manatee	30,614	7,229	8,456	24%	28%
34201 University Park	1,909	855	1,009	45%	53%
34202 Lakewood Ranch	8,287	1,997	2,291	24%	28%
34211 Lakewood Ranch	1,561	238	235	15%	15%
34212 East Manatee	6,028	739	918	12%	15%
34243 Palm Aire	12,829	3,400	4,003	27%	31%
Sarasota Zone	104,560	31,961	38,696	31%	37%
34228 Longboat Key	4,021	1,650	1,917	41%	48%
34229 The Oaks	3,382	1,209	1,513	36%	45%
34231 Gulf Gate	15,611	4,403	5,220	28%	33%
34232 Fruitville	13,735	3,094	4,421	23%	32%
34233 Proctor Road	7,883	2,542	2,854	32%	36%
34234 Newtown	8,155	1,056	1,211	13%	15%
34235 The Meadows	6,658	2,157	2,852	32%	43%
34236 Downtown/Keys	6,767	3,408	4,071	50%	60%
34237 Roberts Arena	6,961	1,133	1,354	16%	19%
34238 Palmer Ranch	9,473	3,778	4,357	40%	46%
34239 Southgate	7,151	2,253	2,683	32%	38%
34240 Laurel Oak	4,439	1,539	1,860	35%	42%
34241 Bent Tree	5,475	1,815	2,196	33%	40%
34242 Siesta Key	4,849	1,924	2,187	40%	45%
Venice/South Zone	98,805	20,451	25,037	21%	25%
Venice	42,732	14,206	16,541	33%	39%
34275 Nokomis	8,547	2,651	3,106	31%	36%
34285 Venice	10,532	3,624	3,919	34%	37%
34292 E Venice	7,239	3,359	4,245	46%	59%
34293 S Venice	16,414	4,572	5,271	28%	32%
North Port	26,042	2,106	3,388	8%	13%
34286 North Port	6,568	464	1,053	7%	16%
34287 North Port	11,607	1,144	1,691	10%	15%
34288 North Port	4,177	255	328	6%	8%
34289 North Port	1,043	95	110	9%	11%
34291 North Port	2,647	148	206	6%	8%
Englewood	30,031	4,139	5,108	14%	17%
33921 Boca Grande	724	173	195	24%	27%
33946 Cape Haze	1,326	214	263	16%	20%
33947 Rotonda	4,257	391	441	9%	10%
33953 El Jobean	2,752	235	270	9%	10%
33981 Gulf Cove	4,345	348	530	8%	12%
34223 Englewood	8,988	1,991	2,358	22%	26%
34224 Englewood	7,639	787	1,051	10%	14%
Total	348,597	66,114	80,129	19%	23%

National Averages

Seasonal Swing	Median Age	College Grad	Average HH Size	Average HH Income	Median HH Income	% Own Home	Median Home Value
39%	46.0	24%	2.33	65,931	45,549	70%	172,050
41%	45.5	21%	2.33	58,793	41,248	69%	144,217
43%	44.6	23%	2.45	60,066	43,684	74%	160,866
30%	42.0	20%	2.25	50,731	35,713	57%	129,125
46%	45.7	15%	2.12	41,174	30,250	60%	87,049
34%	34.7	15%	2.75	53,414	38,675	54%	132,711
37%	53.5	27%	2.12	71,215	50,017	73%	179,476
73%	52.1	29%	1.96	64,939	43,523	56%	166,831
50%	66.4	27%	1.80	68,706	42,922	81%	132,882
92%	61.9	34%	1.87	75,771	47,333	72%	437,850
28%	42.9	28%	2.60	80,059	62,026	89%	185,982
48%	43.9	18%	2.50	55,027	40,986	78%	125,846
42%	55.6	19%	2.12	51,481	38,086	75%	82,534
8%	40.2	23%	2.89	87,061	63,284	87%	256,917
22%	47.7	35%	2.35	92,657	68,893	77%	270,979
49%	63.2	38%	2.02	104,396	73,614	82%	335,486
25%	44.9	39%	2.54	116,368	89,169	80%	334,200
44%	56.3	31%	2.39	102,796	77,725	91%	296,030
21%	42.4	37%	2.69	92,841	68,648	74%	305,473
27%	49.7	31%	2.12	74,274	57,200	72%	217,757
43%	51.6	27%	2.12	80,509	51,418	71%	198,912
176%	70.4	36%	1.77	154,913	99,829	92%	436,347
41%	58.9	30%	2.14	105,168	63,102	87%	308,702
33%	51.7	26%	1.98	66,292	43,096	64%	174,951
21%	45.4	24%	2.29	66,438	51,712	72%	164,210
22%	51.7	30%	2.16	73,855	54,617	75%	154,324
46%	40.3	16%	2.29	47,498	32,244	57%	100,494
44%	53.4	28%	2.10	75,519	53,662	72%	171,211
38%	57.7	29%	1.70	87,319	44,984	56%	354,137
33%	39.3	21%	2.27	47,472	35,639	48%	128,376
43%	62.8	36%	1.89	96,364	61,674	73%	298,640
21%	48.6	27%	2.10	68,213	45,617	67%	179,193
48%	49.2	31%	2.66	116,972	82,154	91%	386,440
25%	51.1	30%	2.48	109,067	70,596	87%	212,190
120%	63.5	33%	1.87	119,881	71,835	82%	483,021
61%	57.2	23%	2.14	66,036	47,589	80%	171,207
56%	62.9	25%	1.96	67,689	47,620	81%	189,354
70%	59.6	26%	2.06	80,048	52,488	84%	234,828
90%	68.8	23%	1.71	61,108	55,193	77%	140,991
67%	65.6	30%	1.91	74,625	53,645	77%	249,771
47%	58.5	24%	2.08	62,417	47,633	84%	184,015
55%	43.4	21%	2.48	58,612	46,376	76%	145,898
31%	37.3	23%	2.83	65,525	55,193	80%	175,586
71%	56.1	16%	2.14	51,320	38,682	86%	119,598
46%	37.2	29%	2.66	65,748	53,184	67%	177,929
76%	37.1	28%	2.66	65,752	53,301	67%	178,101
41%	39.2	20%	2.70	59,369	49,970	75%	154,305
74%	61.6	22%	2.02	62,591	45,067	82%	153,097
273%	67.1	48%	1.87	137,590	71,512	91%	921,679
104%	64.4	33%	2.00	84,004	58,309	90%	274,148
62%	62.6	24%	2.08	61,669	49,798	83%	200,061
93%	60.6	22%	2.14	68,964	49,021	84%	159,669
72%	55.6	20%	2.25	54,755	45,088	86%	138,077
91%	63.7	21%	1.91	61,376	40,157	80%	136,682
100%	60.8	20%	2.00	55,875	42,219	80%	131,279
51%	50.9	25%	2.20	69,685	47,402	73%	176,189
	37.2	26%	2.58	73,034	53,046	65%	181,400

Sources: Audit Bureau of Circulations, 52 weeks ended 12/31/13; Alteryx 2014. Circulation fluctuates. For insert quantities, contact your marketing consultant. Seasonal Swing is 10-year average fluctuation from summer to winter populations. College Grad% is age 25+. The Herald-Tribune also circulates in zip codes 33948, 33950, 33952, 33954, 33955, 33980, 33982 & 33983 in Charlotte County and in DeSoto County. Calculations by Herald-Tribune Research Department.

Annual average circulation is 65,490 daily and 84,851 Sunday, rising to 92,255 daily and 120,267 Sunday.

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