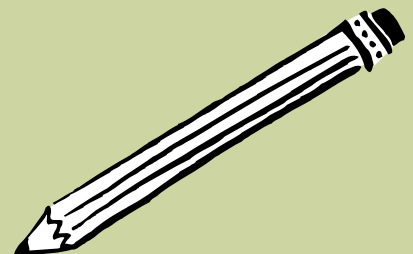
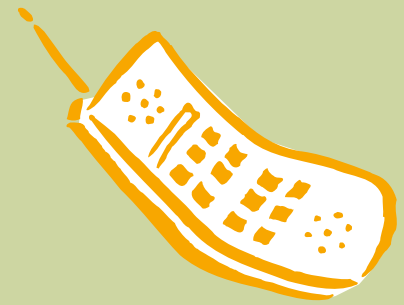
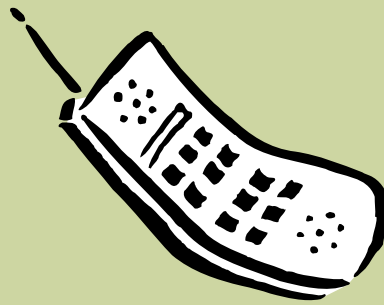
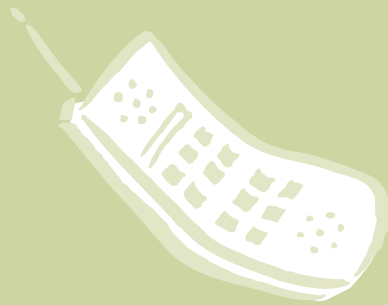
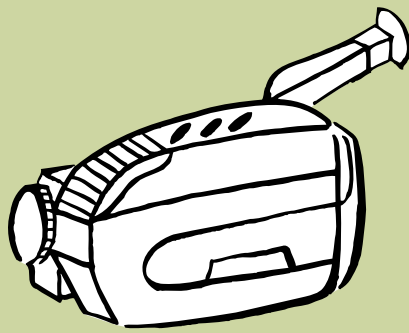


Computers, Electronics & Office Supplies

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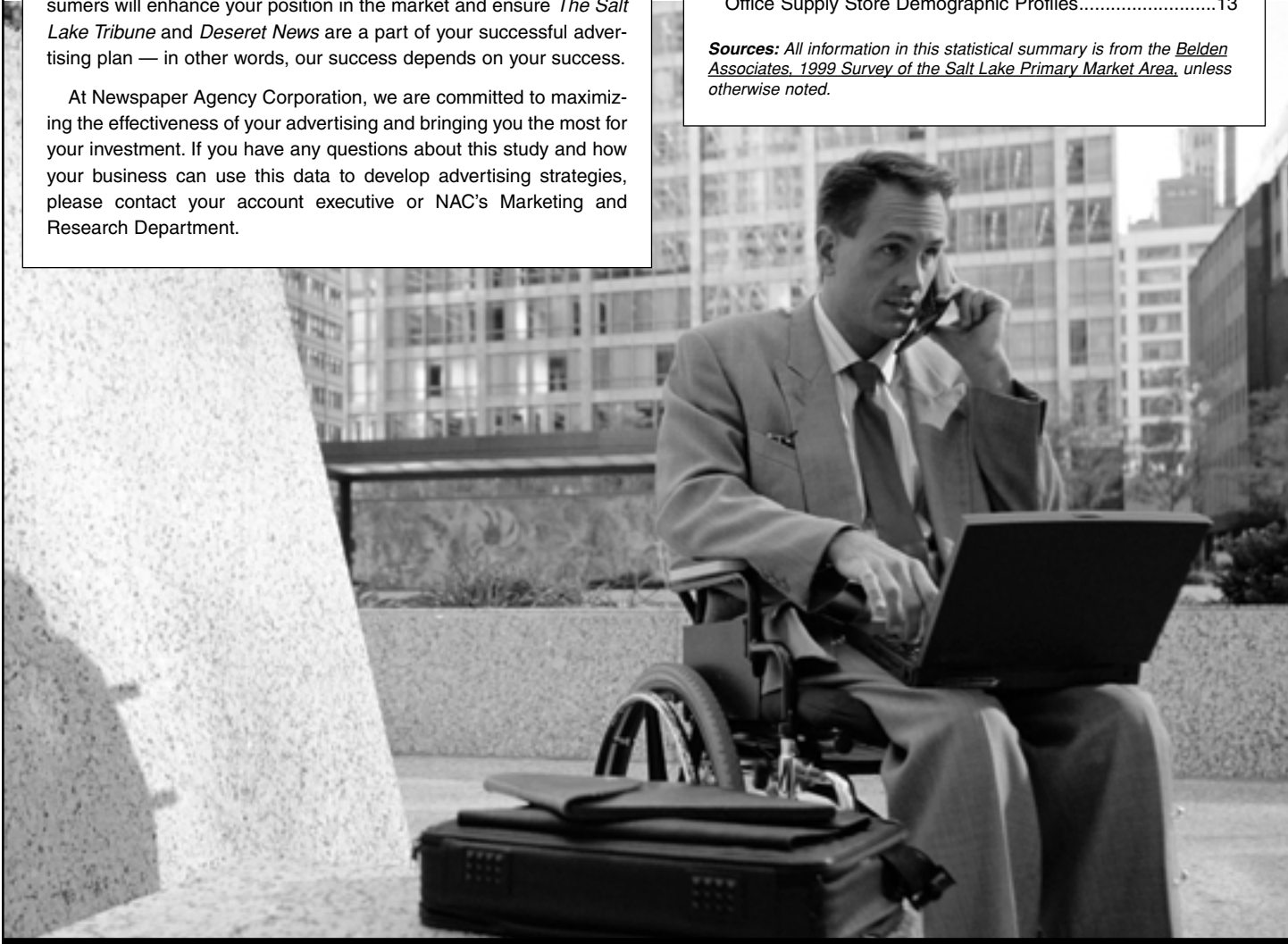
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Sources: All information in this statistical summary is from the Belden Associates, 1999 Survey of the Salt Lake Primary Market Area, unless otherwise noted.



HOME ELECTRONICS STORE MARKET SHARE

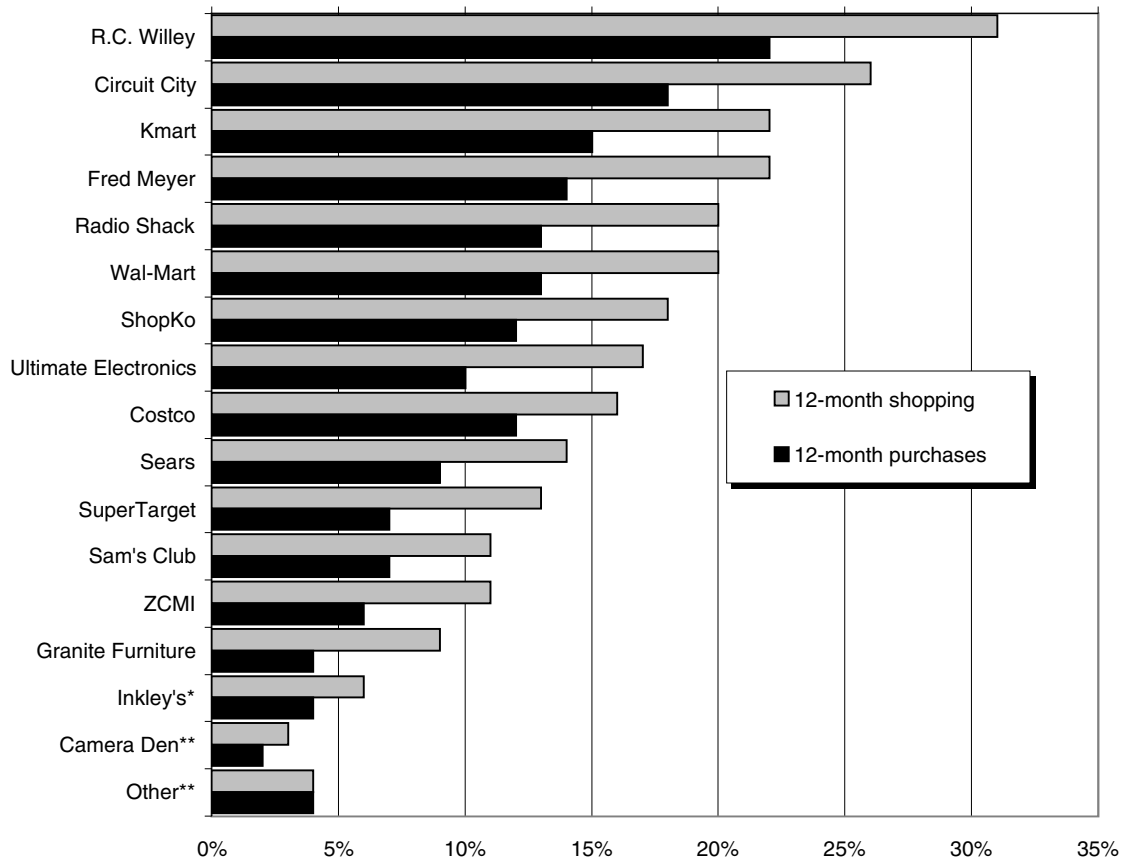
Based on shopping for home electronics costing \$200 or more.

	12-month shopping	12-month purchases	Average shopping trips per customer	Percent of trips resulting in purchase
R.C. Willey	31%	22%	2.2	54%
Circuit City	26%	18%	1.9	56%
Kmart	22%	15%	2.7	57%
Fred Meyer	22%	14%	2.5	53%
Radio Shack	20%	13%	2.1	54%
Wal-Mart	20%	13%	2.8	59%
ShopKo	18%	12%	2.9	50%
Ultimate Electronics	17%	10%	1.8	48%
Costco	16%	12%	2.3	59%
Sears	14%	9%	2.0	49%
SuperTarget	13%	7%	2.5	49%
Sam's Club	11%	7%	2.4	47%
ZCMI	11%	6%	2.1	50%
Granite Furniture	9%	4%	1.7	50%
Inkley's*	6%	4%	1.7	55%
Camera Den**	3%	2%	1.4	72%
Other**	4%	4%	2.3	78%

How to read: Thirty-one percent of adults have shopped at R.C. Willey in the last 12 months with 22 percent making a purchase. The average number of shopping trips per customer is 2.2 with 54 percent of trips resulting in a purchase.

*small sample size; interpret with caution

**very small sample size; interpret with extreme caution



HOME ELECTRONICS STORE MARKET SHARE TRENDS

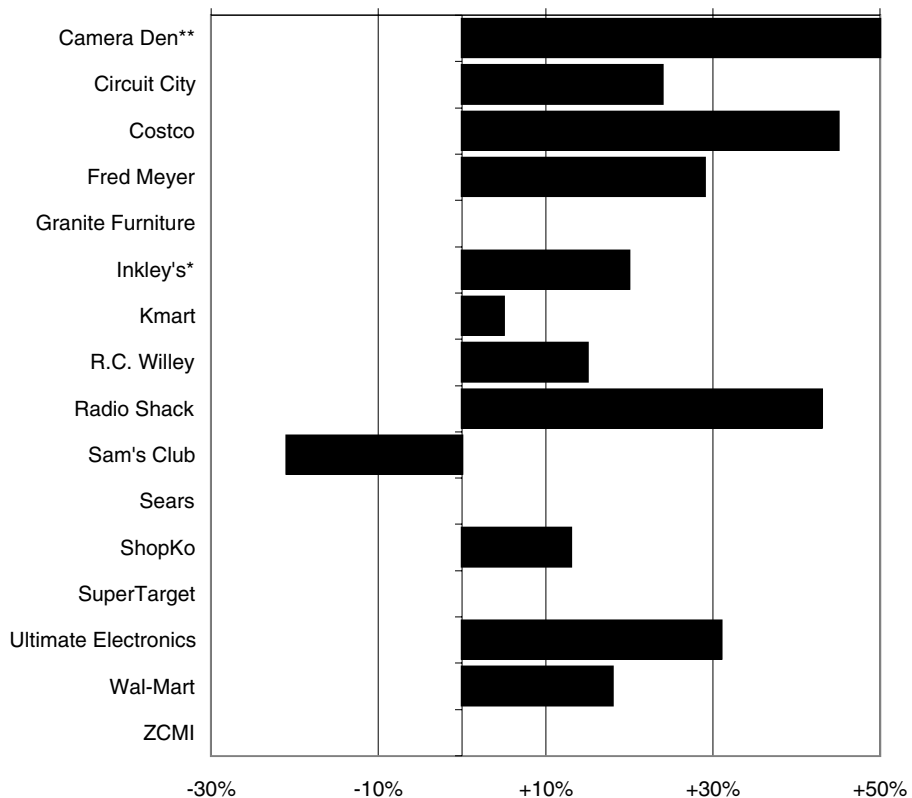
	1997 12-month shopping	1999 12-month shopping	1997 to 1999 change
Camera Den**	2%	3%	+50%
Circuit City	21%	26%	+24%
Costco	11%	16%	+45%
Fred Meyer	17%	22%	+29%
Granite Furniture	9%	9%	+0%
Inkley's*	5%	6%	+20%
Kmart	21%	22%	+5%
R.C. Willey	27%	31%	+15%
Radio Shack	14%	20%	+43%
Sam's Club	14%	11%	-21%
Sears	14%	14%	+0%
ShopKo	16%	18%	+13%
SuperTarget	13%	13%	+0%
Ultimate Electronics	13%	17%	+31%
Wal-Mart	17%	20%	+18%
ZCMI	11%	11%	+0%

How to read: This table shows the percent change in a store's market share from one survey to the next.

For example: Camera Den had a 50 percent increase in market share from 1997 to 1999.

*small sample size; interpret with caution

**very small sample size; interpret with extreme caution



HOME ELECTRONICS STORE CROSS-SHOPPING PATTERNS

Based on shopping for home electronics costing \$200 or more in the past 12 months.

	Circuit City	Costco	Fred Meyer	Granite Furniture	Inkley's*	Kmart	R.C. Willey	Radio Shack
Circuit City		27%	34%	18%	16%	35%	45%	33%
Costco	46%		40%	18%	13%	36%	46%	49%
Fred Meyer	41%	29%		23%	14%	52%	51%	44%
Granite Furniture	52%	31%	53%		14%	54%	67%	39%
Inkley's*	71%	33%	50%	22%		41%	64%	55%
Kmart	41%	25%	51%	23%	11%		53%	48%
R.C. Willey	38%	24%	36%	20%	13%	38%		37%
Radio Shack	43%	39%	48%	18%	17%	54%	58%	
Sam's Club	42%	38%	40%	26%	19%	51%	58%	50%
Sears	43%	38%	60%	22%	20%	58%	59%	57%
ShopKo	48%	29%	60%	28%	14%	65%	70%	47%
SuperTarget	51%	34%	55%	27%	15%	60%	64%	51%
Ultimate Electronics	57%	35%	38%	22%	20%	35%	53%	53%
Wal-Mart	40%	26%	54%	17%	11%	60%	53%	43%
ZCMI	37%	32%	58%	26%	23%	56%	56%	42%

	Sam's Club	Sears	ShopKo	SuperTarget	Ultimate Electronics	Wal-Mart	ZCMI
Circuit City	18%	23%	33%	25%	37%	30%	15%
Costco	27%	34%	33%	29%	38%	32%	22%
Fred Meyer	21%	39%	49%	33%	30%	49%	28%
Granite Furniture	30%	33%	53%	38%	40%	36%	30%
Inkley's*	35%	47%	40%	31%	57%	35%	41%
Kmart	26%	37%	52%	35%	27%	53%	27%
R.C. Willey	21%	27%	40%	27%	29%	34%	19%
Radio Shack	28%	41%	42%	33%	45%	43%	23%
Sam's Club		43%	55%	33%	35%	56%	28%
Sears	33%		51%	41%	47%	48%	37%
ShopKo	34%	41%		47%	38%	65%	29%
SuperTarget	28%	45%	64%		37%	65%	36%
Ultimate Electronics	23%	40%	40%	29%		36%	18%
Wal-Mart	31%	35%	59%	43%	31%		34%
ZCMI	29%	50%	48%	45%	29%	62%	

How to read: This table shows the percentage of a store's shoppers that also shop at other stores. **For example:** Twenty-seven percent of Circuit City's shoppers also shop at Costco.

*small sample size; interpret with caution

The average home electronics shopper shopped at 3.9 stores in the past 12 months.

HOME ELECTRONICS STORE DEMOGRAPHIC PROFILES

For adults who have shopped for home electronics costing \$200 or more in the past 12 months.

	Market	Circuit City	Costco	Fred Meyer	Granite Furniture	Inkley's*	Kmart	R.C. Willey	Radio Shack
Market Share									
Percentage of Adults	100%	26%	16%	22%	9%	6%	22%	31%	20%
Number of Adults	628,000	164,700	98,700	135,700	58,200	37,800	138,400	192,300	124,200
Gender									
Male	49%	51%	48%	48%	52%	61%	49%	48%	51%
Female	51%	49%	52%	52%	48%	39%	51%	52%	49%
Age									
18-24	13%	20%	21%	18%	22%	23%	18%	16%	13%
25-34	21%	25%	16%	20%	22%	13%	18%	21%	19%
35-44	24%	25%	24%	28%	28%	18%	31%	24%	27%
45-54	18%	17%	15%	12%	10%	24%	15%	19%	12%
55-64	10%	10%	13%	11%	8%	21%	10%	14%	15%
65 or Older	14%	3%	12%	11%	10%	2%	9%	7%	14%
Homeownership									
Own	75%	75%	77%	74%	70%	80%	72%	77%	80%
Rent	25%	25%	23%	26%	30%	20%	28%	23%	20%
Marital Status									
Married	67%	69%	67%	65%	63%	57%	66%	67%	72%
Single	18%	23%	25%	23%	28%	34%	18%	18%	16%
Divorced	10%	6%	4%	7%	5%	8%	11%	10%	8%
Widowed	5%	2%	3%	5%	4%	1%	6%	5%	4%
Education Level									
Bachelor's Degree or Higher	32%	33%	33%	30%	32%	32%	30%	30%	31%
Some College or Technical Training	33%	35%	31%	30%	36%	41%	30%	31%	31%
High School Grad or Less	35%	32%	37%	40%	32%	27%	40%	40%	39%
Occupation									
Executive, Professional, Technical	29%	34%	27%	26%	28%	27%	28%	28%	25%
Sales, Clerical	24%	28%	22%	25%	26%	24%	28%	24%	24%
Blue Collar	22%	21%	20%	24%	24%	20%	25%	24%	22%
Retired	15%	4%	16%	13%	9%	11%	10%	10%	16%
Homemaker	7%	7%	10%	5%	7%	6%	3%	8%	5%
Not Employed	4%	6%	5%	7%	6%	14%	5%	7%	9%
Household Income									
Below \$25,000	14%	7%	13%	13%	7%	9%	12%	11%	13%
\$25,000 - \$34,999	17%	14%	15%	18%	16%	14%	18%	16%	20%
\$35,000 - \$49,999	25%	26%	24%	32%	24%	27%	28%	26%	27%
\$50,000 - \$74,999	24%	21%	19%	21%	20%	21%	27%	25%	19%
\$75,000 or More	20%	33%	29%	15%	33%	29%	16%	22%	21%
Readership									
Daily	55%	54%	62%	53%	53%	52%	54%	55%	58%
Sunday	65%	67%	72%	66%	65%	63%	69%	68%	70%

**small sample size; interpret with caution*

HOME ELECTRONICS STORE DEMOGRAPHIC PROFILES (CONTINUED)

For adults who have shopped for home electronics costing \$200 or more in the past 12 months.

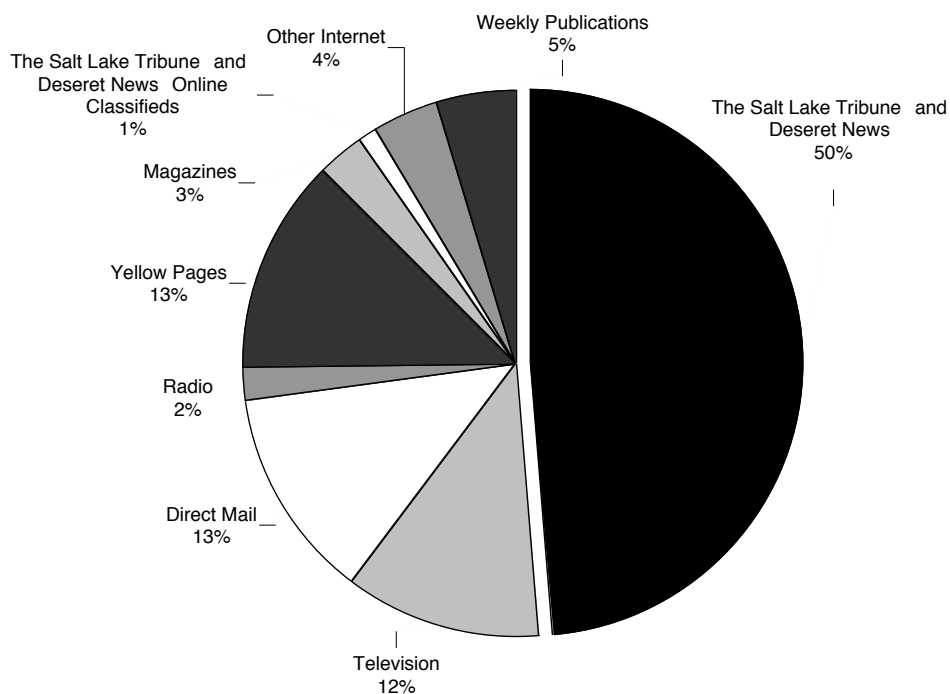
	Market	Sam's Club	Sears	ShopKo	Super-Target	Ultimate Electronics	Wal-Mart	ZCMI
Market Share								
Percentage of Adults	100%	11%	14%	18%	13%	17%	20%	11%
Number of Adults	628,000	69,000	89,200	111,400	81,600	106,300	122,900	66,800
Gender								
Male	49%	62%	56%	47%	43%	60%	51%	56%
Female	51%	38%	44%	53%	57%	41%	49%	44%
Age								
18-24	13%	19%	11%	22%	17%	11%	19%	20%
25-34	21%	16%	21%	16%	22%	21%	22%	11%
35-44	24%	29%	24%	33%	27%	29%	28%	29%
45-54	18%	19%	16%	15%	18%	20%	18%	18%
55-64	10%	14%	19%	10%	12%	10%	7%	10%
65 or Older	14%	5%	10%	5%	5%	9%	7%	12%
Homeownership								
Own	75%	75%	76%	67%	75%	74%	69%	72%
Rent	25%	25%	24%	34%	25%	26%	31%	29%
Marital Status								
Married	67%	68%	72%	56%	68%	70%	58%	65%
Single	18%	22%	13%	28%	21%	17%	23%	22%
Divorced	10%	7%	12%	11%	8%	11%	13%	8%
Widowed	5%	4%	3%	5%	2%	2%	7%	5%
Education Level								
Bachelor's Degree or Higher	32%	39%	34%	29%	38%	39%	28%	33%
Some College or Technical Training	33%	34%	35%	29%	33%	33%	30%	31%
High School Grad or Less	35%	27%	31%	42%	30%	28%	42%	36%
Occupation								
Executive, Professional, Technical	29%	32%	30%	29%	32%	38%	29%	31%
Sales, Clerical	24%	26%	21%	24%	29%	21%	22%	20%
Blue Collar	22%	24%	21%	27%	17%	19%	26%	25%
Retired	15%	9%	19%	8%	6%	10%	10%	14%
Homemaker	7%	4%	2%	4%	8%	6%	6%	2%
Not Employed	4%	5%	7%	8%	9%	8%	6%	8%
Household Income								
Below \$25,000	14%	10%	11%	15%	8%	7%	13%	11%
\$25,000 - \$34,999	17%	12%	17%	19%	19%	15%	26%	22%
\$35,000 - \$49,999	25%	25%	28%	24%	24%	24%	24%	29%
\$50,000 - \$74,999	24%	19%	19%	20%	26%	21%	21%	17%
\$75,000 or More	20%	34%	25%	23%	23%	32%	16%	21%
Readership								
Daily	55%	55%	56%	52%	55%	64%	51%	57%
Sunday	65%	75%	73%	64%	73%	70%	65%	73%

HOME ELECTRONICS STORE PURCHASE INTENTIONS

Adults who are likely to purchase the following items in the next 12 months.

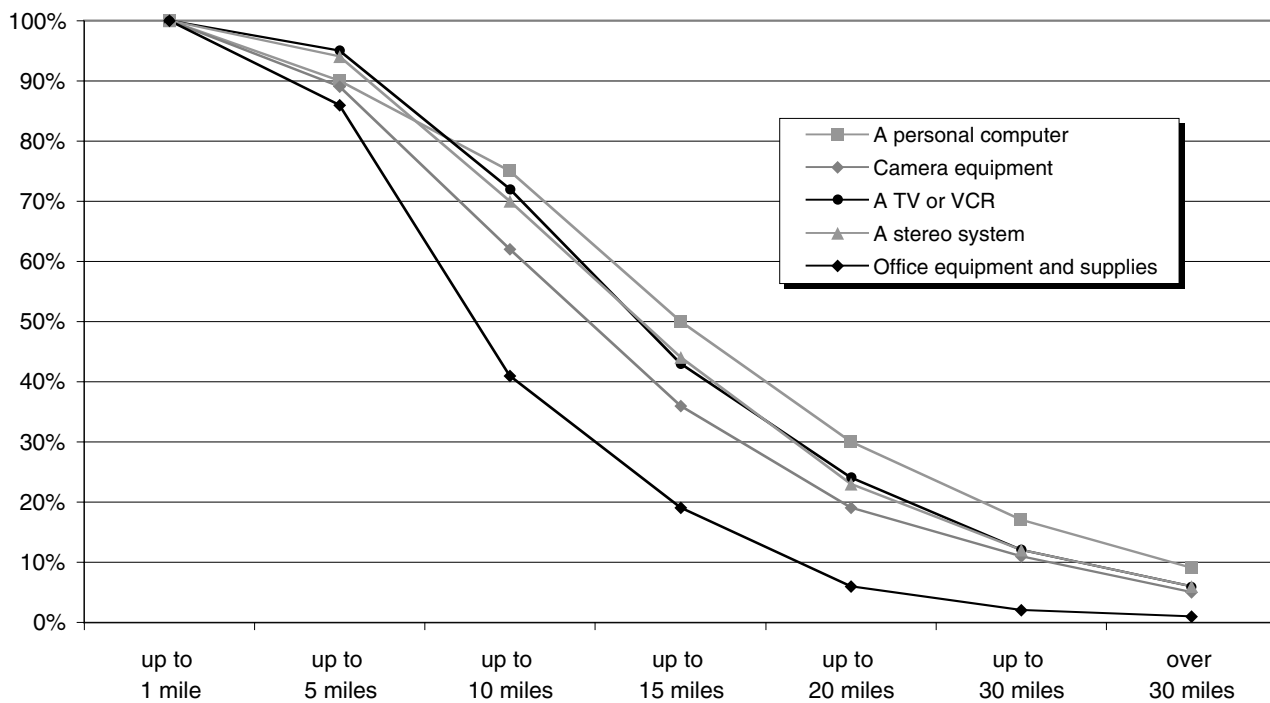
Item	Percent likely to purchase	Number of adults likely to purchase
Stereo Equipment	22%	136,500
Camera Equipment	21%	134,900
IBM Computer	21%	133,000
Cellular Phone	18%	110,800
Video Camera	17%	107,000
VCR	17%	105,000
TV	16%	102,400
DVD Player	15%	94,900
Digital Satellite System	11%	72,200
Big Screen TV	10%	65,900
Fax Machine	7%	46,600
Macintosh Computer	6%	36,600
Traditional (Large) Satellite System	2%	11,100

PREFERRED ADVERTISING SOURCE FOR HOME ELECTRONICS



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

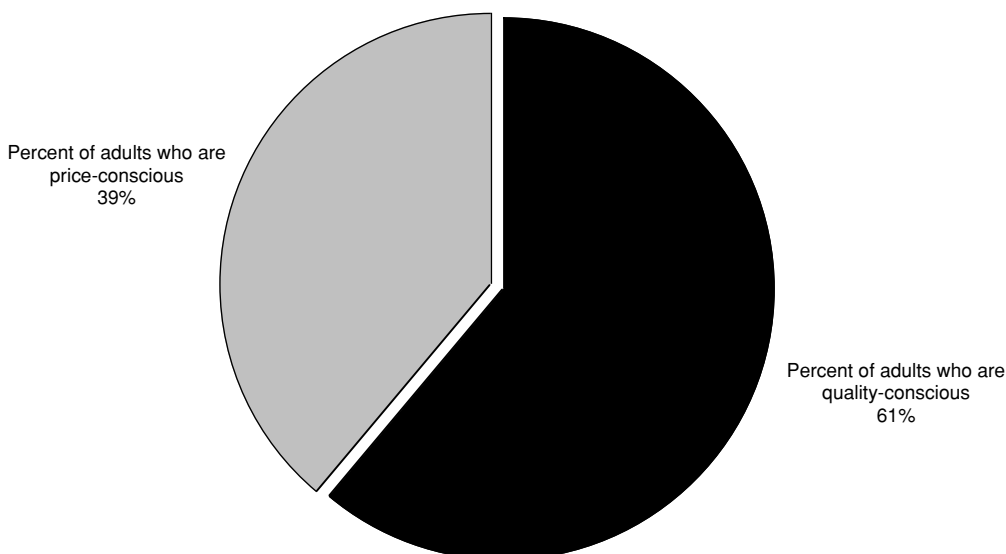
DISTANCE SHOPPERS ARE WILLING TO TRAVEL



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
A personal computer	100%	90%	75%	50%	30%	17%	9%
Camera equipment	100%	89%	62%	36%	19%	11%	5%
A TV or VCR	100%	95%	72%	43%	24%	12%	6%
A stereo system	100%	94%	70%	44%	23%	12%	6%
Office equipment and supplies	100%	86%	41%	19%	6%	2%	1%

How to read: Seventy-five percent of adults are willing to travel up to 10 miles to purchase a computer. Only 9 percent are willing to travel over 30 miles.

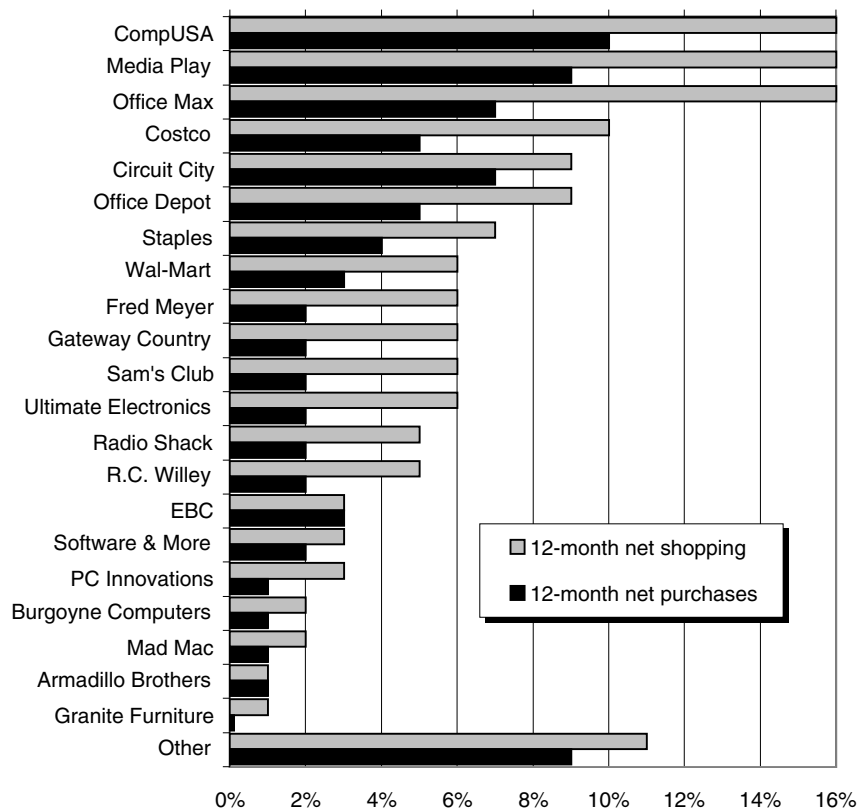
HOME ELECTRONICS PRICE-QUALITY PREFERENCE



HOME COMPUTER STORE MARKET SHARE

	12-month net shopping	12-month net purchases
CompUSA	16%	10%
Media Play	16%	9%
Office Max	16%	7%
Costco	10%	5%
Circuit City	9%	7%
Office Depot	9%	5%
Staples	7%	4%
Wal-Mart	6%	3%
Fred Meyer	6%	2%
Gateway Country	6%	2%
Sam's Club	6%	2%
Ultimate Electronics	6%	2%
Radio Shack	5%	2%
R.C. Willey	5%	2%
EBC	3%	3%
Software & More	3%	2%
PC Innovations	3%	1%
Burgoyne Computers	2%	1%
Mad Mac	2%	1%
Armadillo Brothers	1%	1%
Granite Furniture	1%	0.1%
Other	11%	9%

How to read: Six percent of adults have shopped at CompUSA in the last 12 months, with 10 percent making a purchase.



HOME COMPUTER PURCHASE PATTERNS

	12-month net shopping	Items shopped for		
		Computer	Hardware	Software
CompUSA	16%	44%	50%	63%
Media Play	16%	6%	6%	88%
Office Max	16%	25%	38%	81%
Costco	10%	40%	30%	60%
Circuit City	9%	67%	44%	67%
Office Depot	9%	33%	44%	67%
Staples*	7%	29%	43%	57%
Wal-Mart*	6%	17%	17%	83%
Fred Meyer*	6%	33%	17%	67%
Gateway Country*	6%	83%	33%	33%
Sam's Club*	6%	33%	33%	67%
Ultimate Electronics*	6%	50%	17%	50%
Radio Shack**	5%	40%	40%	20%
R.C. Willey**	5%	80%	40%	20%
EBC**	3%	33%	100%	33%
Software & More**	3%	33%	33%	67%
PC Innovations**	3%	67%	33%	33%
Burgoyne Computers**	2%	50%	50%	50%
Mad Mac**	2%	50%	50%	50%
Armadillo Brothers**	1%	100%	10%	40%
Granite Furniture**	1%	100%	100%	100%
Other	11%	55%	36%	55%

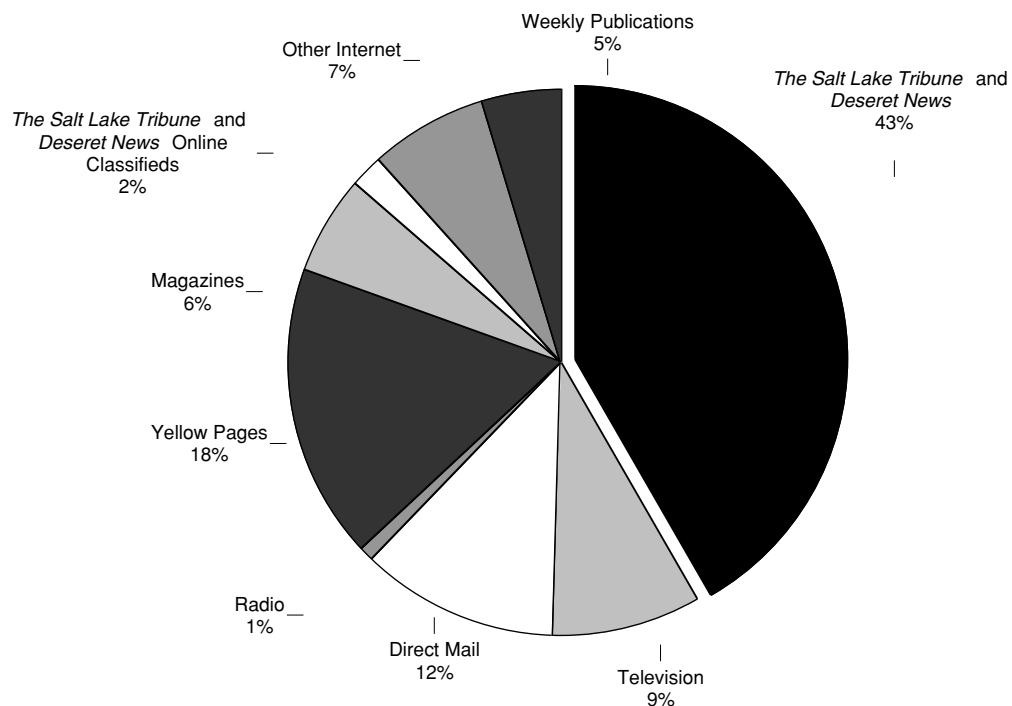
How to read: Of the 16 percent of adults that shopped at CompUSA, 44 percent shopped for a computer, 50 percent hardware, and 63 percent software.

*small sample size; interpret with caution

**very small sample size; interpret with extreme caution

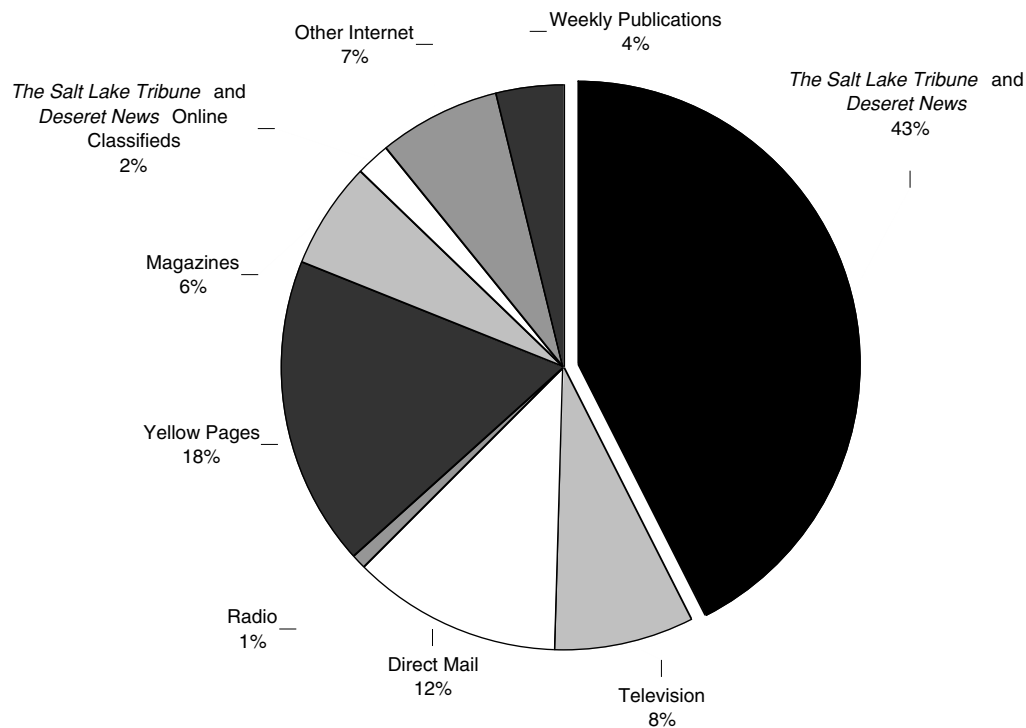


PREFERRED ADVERTISING SOURCE FOR COMPUTER HARDWARE



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

PREFERRED ADVERTISING SOURCE FOR COMPUTER SOFTWARE

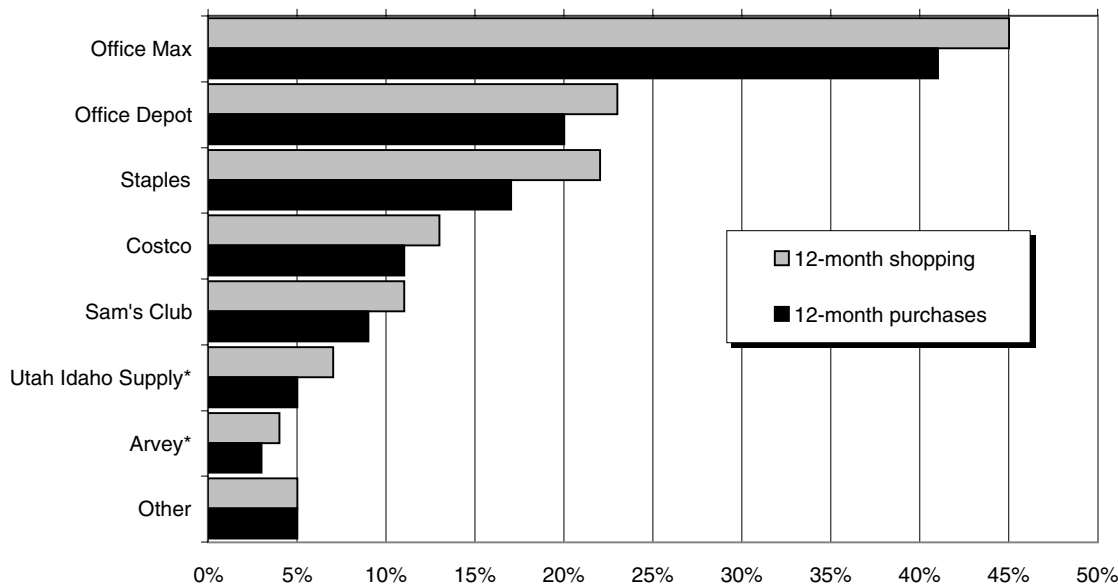


Note: Percentages may total more than 100 percent because some respondents chose more than one source.

OFFICE SUPPLY STORE MARKET SHARE

	12-month shopping	12-month purchases	Average shopping trips per customer	Percent of trips resulting in purchase
Office Max	45%	41%	2.7	85%
Office Depot	23%	20%	2.5	83%
Staples	22%	17%	2.1	76%
Costco	13%	11%	2.3	77%
Sam's Club	11%	9%	2.8	77%
Utah Idaho Supply*	7%	5%	2.0	86%
Arvey*	4%	3%	2.2	71%
Other	5%	5%	2.0	87%

How to read: Forty-five percent of adults have shopped at Office Max in the last 12 months, with 41 percent making a purchase. The average number of shopping trips per customer is 2.7, with 85 percent of trips ending in a purchase.
 *small sample size; interpret with caution



OFFICE SUPPLY STORE CROSS-SHOPPING PATTERNS

For adults who have shopped in the past 12 months.

	Arvey*	Costco	Office Depot	Office Max	Sam's Club	Staples	Utah Idaho Supply*
Arvey*	49%	43%	75%	31%	38%	26%	
Costco	16%	45%	64%	22%	38%	11%	
Office Depot	8%	25%	63%	18%	52%	11%	
Office Max	7%	19%	33%	15%	34%	11%	
Sam's Club	12%	27%	39%	60%	40%	16%	
Staples	7%	22%	55%	70%	20%	11%	
Utah Idaho Supply*	17%	21%	40%	75%	27%	37%	

How to read: This table shows the percentage of a store's shoppers that also shop at other stores. **For example:** Forty-nine percent of Arvey shoppers also shop at Costco; 43 percent shop at Office Depot.
 *small sample size; interpret with caution

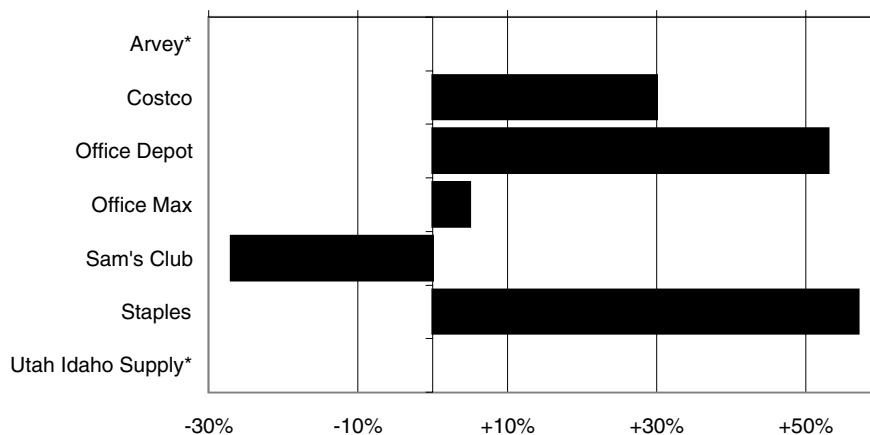
OFFICE SUPPLY STORE MARKET SHARE TRENDS

	1997 12-month shopping	1999 12-month shopping	1997 to 1999 change
Arvey*	4%	4%	+0%
Costco	10%	13%	+30%
Office Depot	15%	23%	+53%
Office Max	43%	45%	+5%
Sam's Club	15%	11%	-27%
Staples	14%	22%	+57%
Utah Idaho Supply*	7%	7%	+0%

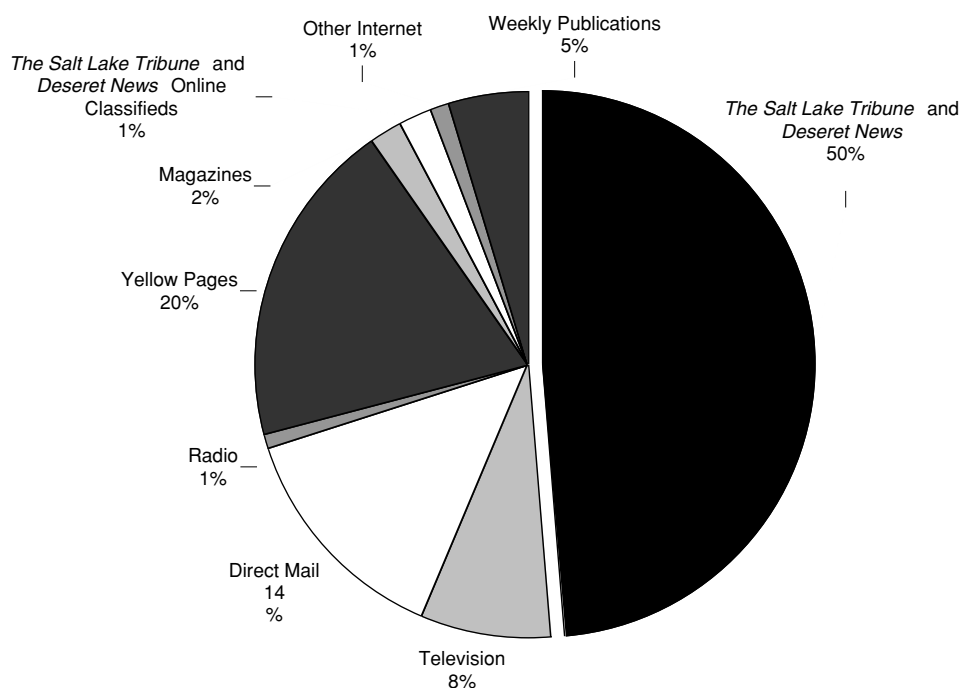
How to read: This table shows the percentage change in a store's market share from survey to survey.

For example: Office Max had a 5 percent increase in market share from 1997 to 1999.

**small sample size; interpret with caution*



PREFERRED ADVERTISING SOURCE FOR OFFICE SUPPLIES



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

OFFICE SUPPLY STORE DEMOGRAPHIC PROFILES

For adults who have shopped in the past 12 months

	Market	Arvey*	Costco	Office Depot	Office Max	Sam's Club	Staples	Utah Idaho Supply*
Market Share								
Percentage of Adults	100%	4%	13%	23%	45%	11%	22%	7%
Number of Adults	628,000	26,600	81,600	145,400	279,300	68,700	137,800	41,500
Gender								
Male	49%	43%	52%	61%	49%	51%	56%	23%
Female	51%	57%	48%	39%	51%	49%	44%	77%
Age								
18-24	13%	21%	23%	19%	12%	16%	16%	8%
25-34	21%	22%	21%	27%	22%	23%	26%	34%
35-44	24%	14%	19%	29%	29%	22%	27%	26%
45-54	18%	18%	23%	15%	17%	22%	16%	12%
55-64	10%	19%	8%	4%	11%	13%	6%	9%
65 or Older	14%	5%	6%	6%	10%	5%	9%	11%
Homeownership								
Own	75%	82%	78%	72%	79%	84%	73%	84%
Rent	25%	18%	22%	28%	22%	16%	27%	16%
Marital Status								
Married	67%	61%	70%	61%	71%	70%	60%	76%
Single	18%	26%	25%	28%	18%	19%	25%	14%
Divorced	10%	7%	3%	9%	7%	8%	12%	8%
Widowed	5%	6%	2%	1%	5%	4%	3%	2%
Education Level								
Bachelor's Degree or Higher	32%	32%	43%	39%	39%	36%	37%	44%
Some College or Technical Training	33%	30%	30%	33%	33%	36%	37%	33%
High School Grad or Less	35%	39%	28%	29%	29%	29%	26%	22%
Occupation								
Executive, Professional, Technical	29%	36%	41%	34%	34%	41%	32%	39%
Sales, Clerical	24%	39%	24%	26%	24%	24%	25%	35%
Blue Collar	22%	12%	18%	25%	22%	18%	21%	7%
Retired	15%	9%	5%	6%	11%	6%	10%	10%
Homemaker	7%	3%	9%	5%	7%	6%	6%	6%
Not Employed	4%	1%	3%	4%	3%	6%	6%	3%
Household Income								
Below \$25,000	14%	7%	3%	7%	9%	6%	9%	5%
\$25,000 - \$34,999	17%	11%	13%	15%	14%	18%	14%	4%
\$35,000 - \$49,999	25%	36%	22%	24%	24%	19%	24%	42%
\$50,000 - \$74,999	24%	18%	19%	19%	28%	26%	25%	34%
\$75,000 or More	20%	29%	43%	35%	26%	31%	29%	16%
Readership								
Daily	55%	60%	63%	54%	57%	53%	53%	50%
Sunday	65%	67%	72%	67%	66%	66%	63%	67%

*small sample size; interpret with caution.

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