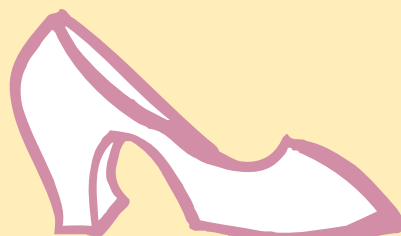


# Clothing & Fine Jewelry

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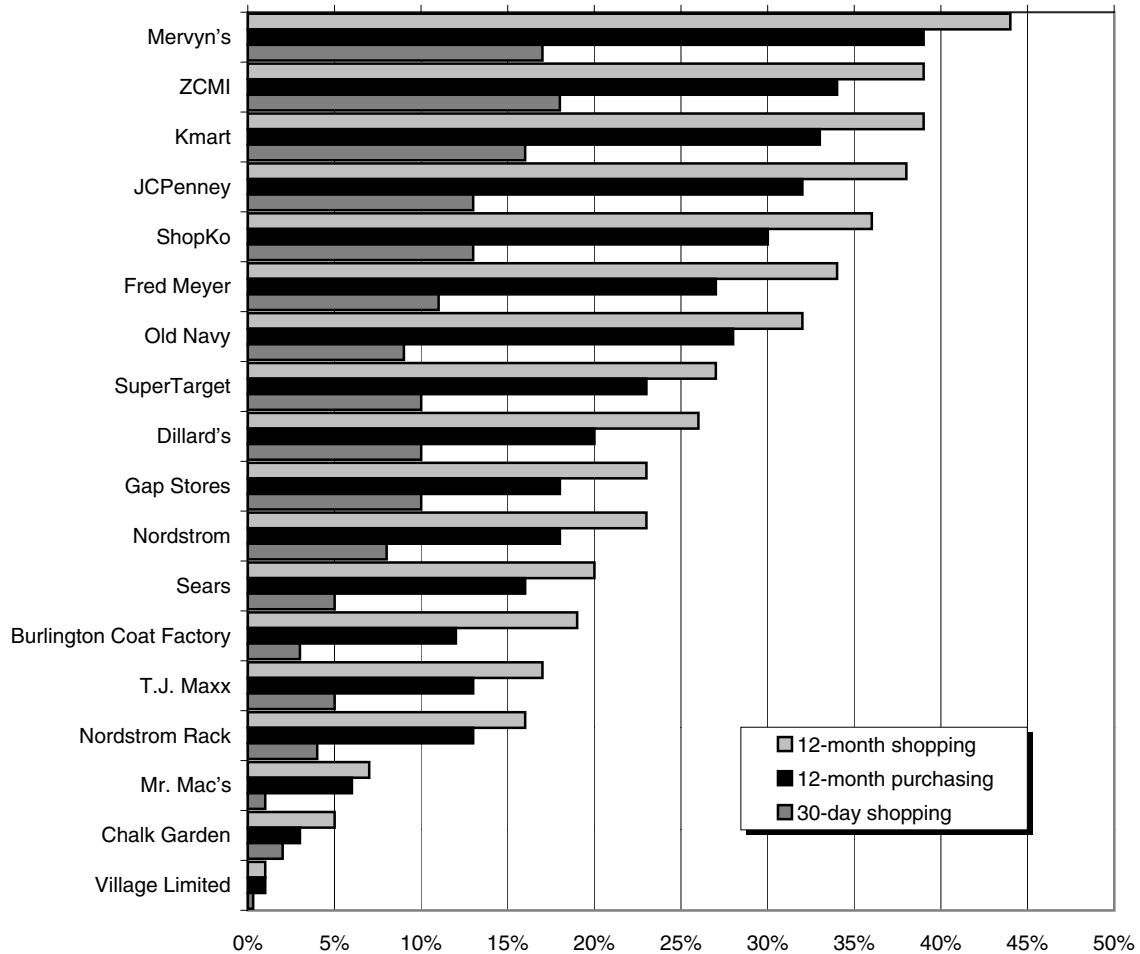
**Sources:** All information in this statistical summary is from the *Belden Associates, 1999 Survey of the Salt Lake Primary Market Area*, unless otherwise noted.



## CLOTHING STORE MARKET SHARE

	12-month shopping	12-month purchasing	Average shopping trips per customer	Percent of trips ending in purchase	30-day shopping
Mervyn's	44%	39%	3.0	79%	17%
ZCMI	39%	34%	3.3	79%	18%
Kmart	39%	33%	3.0	81%	16%
JCPenney	38%	32%	2.8	70%	13%
ShopKo	36%	30%	2.8	78%	13%
Fred Meyer	34%	27%	2.8	73%	11%
Old Navy	32%	28%	2.7	82%	9%
SuperTarget	27%	23%	2.8	78%	10%
Dillard's	26%	20%	2.7	67%	10%
Gap Stores	23%	18%	2.7	73%	10%
Nordstrom	23%	18%	2.8	68%	8%
Sears	20%	16%	2.5	77%	5%
Burlington Coat Factory	19%	12%	1.8	55%	3%
T.J. Maxx	17%	13%	2.9	71%	5%
Nordstrom Rack	16%	13%	2.4	75%	4%
Mr. Mac's	7%	6%	2.0	90%	1%
Chalk Garden	5%	3%	3.0	46%	2%
Village Limited	1%	1%	3.1	89%	0.3%

**How to read:** 44 percent of adults shopped at Mervyn's in the last 12 months with 39 percent making a purchase. The average Mervyn's customer made 3 shopping trips with 79 percent resulting in a purchase. Seventeen percent of adults have shopped at Mervyn's in the last 30 days.



## CLOTHING STORE MARKET SHARE TRENDS

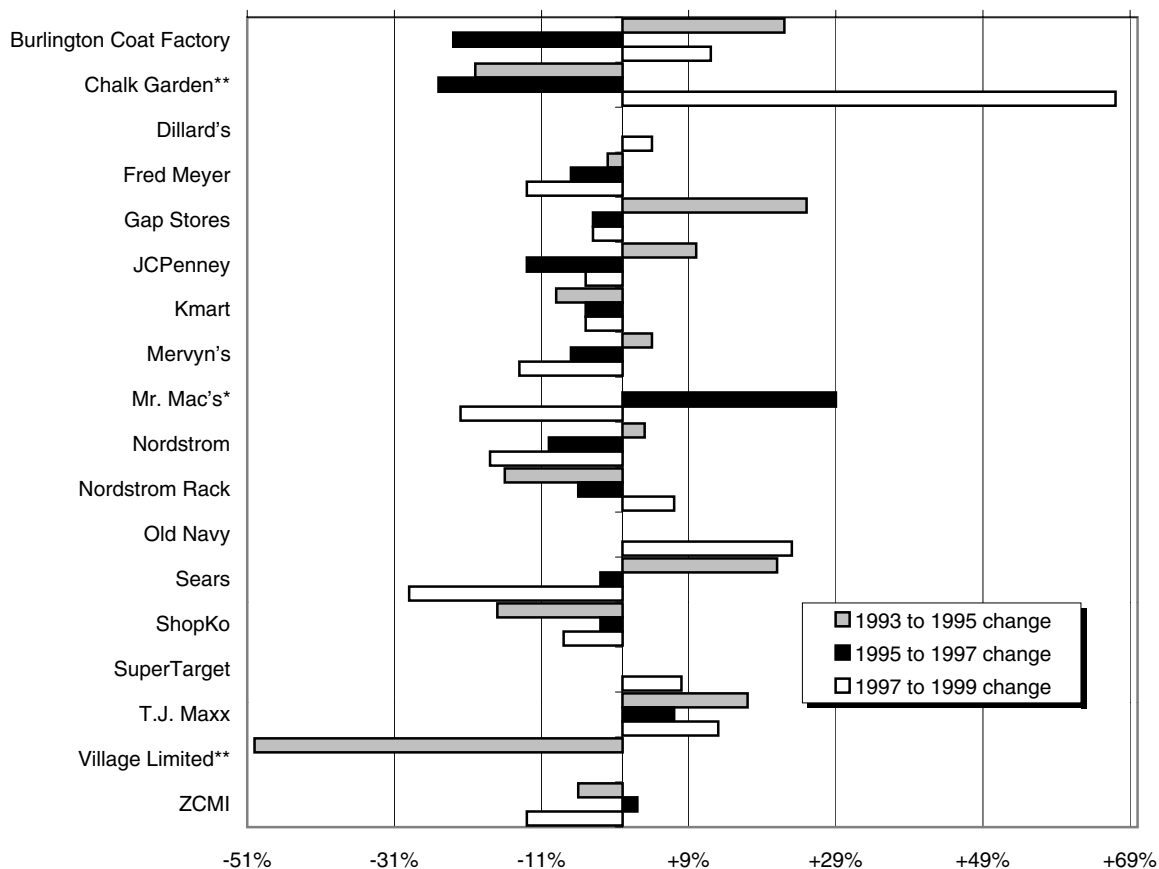
	1993 12-month shopping	1995 12-month shopping	1993 to 1995 change	1997 12-month shopping	1995 to 1997 change	1999 12-month shopping	1997 to 1999 change
Burlington Coat Factory	18%	22%	+22%	17%	-23%	19%	+12%
Chalk Garden**	5%	4%	-20%	3%	-25%	5%	+67%
Dillard's	ns	25%	ns	25%	+0%	26%	+4%
Fred Meyer	43%	42%	-2%	39%	-7%	34%	-13%
Gap Stores	20%	25%	+25%	24%	-4%	23%	-4%
JCPenney	42%	46%	+10%	40%	-13%	38%	-5%
Kmart	47%	43%	-9%	41%	-5%	39%	-5%
Mervyn's	53%	55%	+4%	51%	-7%	44%	-14%
Mr. Mac's*	7%	7%	+0%	9%	+29%	7%	-22%
Nordstrom	30%	31%	+3%	28%	-10%	23%	-18%
Nordstrom Rack	19%	16%	-16%	15%	-6%	16%	+7%
Old Navy	ns	ns	ns	26%	ns	32%	+23%
Sears	24%	29%	+21%	28%	-3%	20%	-29%
ShopKo	48%	40%	-17%	39%	-3%	36%	-8%
SuperTarget	ns	ns	ns	25%	ns	27%	+8%
T.J. Maxx	12%	14%	+17%	15%	+7%	17%	+13%
Village Limited**	2%	1%	-50%	1%	+0%	1%	+0%
ZCMI	47%	44%	-6%	45%	+2%	39%	-13%

**How to read:** This table shows the change in a store's market share from survey to survey. For example: Burlington had a 22 percent increase in market share from 1993 to 1995, a 23 percent decrease from 1995 to 1997, and a 12 percent increase from 1995 to 1997.

\* small sample size; interpret with caution

\*\* very small sample size; interpret with caution

ns=not surveyed



## CLOTHING STORE CROSS-SHOPPING PATTERNS

For adults who shopped for clothing during the past 12 months.

	Burlington Coat Factory	Chalk Garden*	Dillard's	Fred Meyer	Gap Stores	JCPenney	Kmart	Mervyn's	Mr. Mac's*
Burlington Coat Factory		5%	53%	51%	36%	58%	43%	69%	9%
Chalk Garden*	20%		61%	45%	73%	38%	36%	61%	8%
Dillard's	37%	11%		40%	50%	58%	33%	69%	5%
Fred Meyer	28%	6%	31%		37%	51%	58%	66%	10%
Gap Stores	29%	15%	57%	53%		54%	34%	64%	8%
JCPenney	28%	5%	40%	45%	33%		45%	69%	10%
Kmart	20%	5%	22%	50%	20%	44%		55%	7%
Mervyn's	29%	7%	41%	50%	34%	59%	48%		9%
Mr. Mac's*	24%	6%	18%	48%	29%	55%	41%	57%	
Nordstrom	32%	17%	72%	45%	57%	53%	28%	65%	5%
Nordstrom Rack	33%	14%	61%	46%	57%	44%	33%	69%	4%
Old Navy	28%	11%	49%	45%	57%	57%	41%	65%	9%
Sears	33%	6%	38%	53%	31%	59%	56%	64%	7%
ShopKo	25%	4%	26%	53%	22%	47%	66%	60%	8%
SuperTarget	28%	6%	33%	62%	41%	59%	62%	67%	6%
T.J. Maxx	25%	14%	53%	50%	57%	54%	37%	58%	6%
ZCMI	23%	11%	48%	44%	39%	55%	35%	59%	8%

	Nordstrom	Nordstrom Rack	Old Navy	Sears	ShopKo	SuperTarget	T.J. Maxx	ZCMI
Burlington Coat Factory	41%	28%	49%	36%	49%	41%	23%	48%
Chalk Garden*	83%	47%	77%	25%	31%	32%	49%	86%
Dillard's	64%	36%	60%	30%	37%	34%	34%	70%
Fred Meyer	31%	21%	43%	32%	58%	50%	25%	50%
Gap Stores	57%	38%	80%	27%	35%	48%	42%	65%
JCPenney	33%	18%	49%	32%	45%	42%	24%	56%
Kmart	17%	13%	34%	29%	61%	43%	16%	35%
Mervyn's	35%	24%	48%	29%	49%	42%	22%	52%
Mr. Mac's*	19%	10%	42%	22%	45%	24%	15%	48%
Nordstrom		47%	66%	28%	33%	34%	36%	75%
Nordstrom Rack	70%		66%	27%	40%	34%	41%	66%
Old Navy	48%	32%		24%	42%	44%	28%	57%
Sears	32%	20%	38%		61%	46%	27%	51%
ShopKo	21%	17%	38%	34%		46%	20%	36%
SuperTarget	29%	19%	52%	35%	62%		34%	47%
T.J. Maxx	49%	37%	53%	32%	42%	54%		67%
ZCMI	45%	27%	48%	27%	34%	34%	30%	

**How to read:** This table shows the percentage of a store's shoppers that also shop at other stores. For example, 5 percent of Burlington's shoppers also shop at Chalk Garden.

\* small sample size; interpret with caution



## CLOTHING STORE DEMOGRAPHIC PROFILES

For adults who shopped for clothing during the past 12 months.

	Market	Burlington Coat Factory	Chalk Garden*	Dillard's	Fred Meyer	Gap Stores	JCPenney	Kmart	Mervyn's	Mr. Mac's*
<b>Market Share</b>										
Percentage of Adults	100%	19%	5%	26%	34%	23%	38%	39%	44%	7%
Number of Adults	628,000	116,100	30,100	164,500	211,300	145,000	238,200	244,300	277,600	42,100
<b>Gender</b>										
Male	49%	35%	45%	33%	39%	42%	36%	37%	35%	60%
Female	51%	65%	55%	67%	61%	58%	64%	63%	65%	40%
<b>Age</b>										
18-24	13%	18%	26%	14%	15%	20%	13%	11%	12%	12%
25-34	21%	23%	23%	23%	27%	36%	21%	26%	26%	12%
35-44	24%	23%	21%	28%	28%	25%	26%	27%	28%	27%
45-54	18%	15%	30%	14%	16%	10%	18%	17%	14%	30%
55-64	10%	9%	ns	9%	7%	6%	11%	6%	9%	13%
65 or Older	14%	12%	ns	13%	8%	4%	11%	13%	12%	6%
<b>Homeownership</b>										
Own	75%	72%	74%	81%	76%	71%	80%	76%	79%	81%
Rent	25%	28%	26%	19%	24%	29%	20%	24%	21%	19%
<b>Marital Status</b>										
Married	67%	67%	63%	68%	73%	64%	68%	70%	65%	69%
Single	18%	19%	31%	19%	16%	25%	17%	12%	18%	8%
Divorced	10%	10%	6%	7%	9%	9%	11%	12%	12%	20%
Widowed	5%	4%	ns	6%	3%	2%	5%	6%	6%	3%
<b>Education Level</b>										
Bachelor's Degree or Higher	32%	37%	44%	40%	30%	37%	32%	27%	31%	49%
Some College or Technical Training	33%	35%	18%	31%	35%	32%	32%	31%	32%	27%
High School Grad or Less	35%	28%	38%	29%	35%	31%	36%	42%	37%	23%
<b>Occupation</b>										
Executive, Professional, Technical	29%	30%	40%	33%	29%	32%	29%	22%	27%	48%
Sales, Clerical	24%	28%	22%	30%	27%	26%	29%	28%	29%	14%
Blue Collar	22%	15%	21%	12%	21%	21%	16%	24%	18%	15%
Retired	15%	13%	ns	12%	9%	4%	14%	13%	12%	8%
Homemaker	7%	8%	9%	9%	9%	13%	8%	9%	9%	12%
Not Employed	4%	6%	8%	5%	5%	5%	5%	4%	4%	3%
<b>Household Income</b>										
Below \$25,000	14%	17%	4%	9%	10%	10%	11%	14%	11%	13%
\$25,000 - \$34,999	17%	12%	8%	8%	16%	13%	14%	23%	16%	5%
\$35,000 - \$49,999	25%	22%	27%	25%	28%	18%	25%	28%	29%	27%
\$50,000 - \$74,999	24%	26%	16%	29%	25%	25%	25%	21%	26%	32%
\$75,000 or More	20%	23%	44%	30%	22%	34%	25%	14%	19%	23%
<b>Readership</b>										
Daily	55%	51%	56%	56%	52%	46%	55%	53%	55%	65%
Sunday	65%	63%	69%	71%	67%	61%	65%	68%	69%	77%

\*small sample size; interpret with caution  
ns=none surveyed

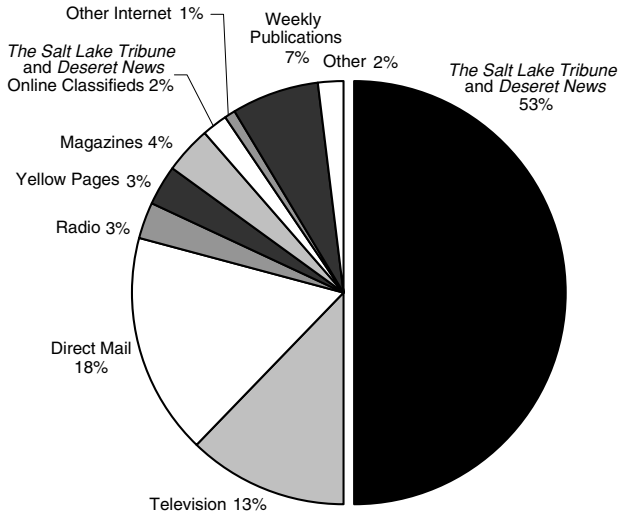
## CLOTHING STORE DEMOGRAPHIC PROFILES (CONTINUED)

For adults who shopped for clothing during the past 12 months.

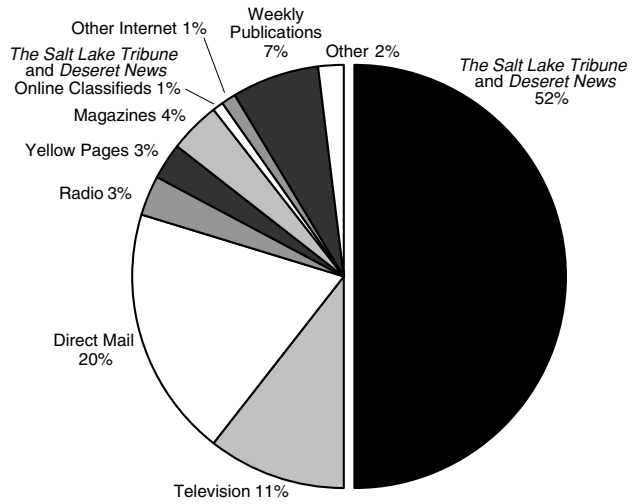
	Market	Nordstrom	Nordstrom Rack	Old Navy	Sears	ShopKo	Super Target	T.J. Maxx	ZCMI
<b>Market Share</b>									
Percentage of Adults	100%	23%	16%	32%	20%	36%	27%	17%	39%
Number of Adults	628,000	146,400	97,400	203,400	127,300	228,500	170,800	107,100	241,500
<b>Gender</b>									
Male	49%	41%	38%	40%	47%	38%	34%	30%	39%
Female	51%	59%	62%	60%	53%	62%	66%	70%	61%
<b>Age</b>									
18-24	13%	19%	14%	18%	15%	10%	17%	14%	12%
25-34	21%	22%	30%	27%	30%	28%	33%	32%	21%
35-44	24%	29%	25%	29%	15%	30%	28%	30%	26%
45-54	18%	12%	15%	16%	16%	15%	11%	15%	19%
55-64	10%	8%	5%	6%	15%	8%	7%	6%	10%
65 or Older	14%	9%	11%	4%	10%	9%	4%	3%	14%
<b>Homeownership</b>									
Own	75%	74%	71%	73%	78%	73%	71%	75%	81%
Rent	25%	26%	29%	27%	22%	27%	29%	26%	19%
<b>Marital Status</b>									
Married	67%	63%	66%	68%	68%	65%	69%	71%	69%
Single	18%	28%	23%	20%	16%	17%	20%	16%	19%
Divorced	10%	7%	10%	10%	12%	14%	10%	10%	7%
Widowed	5%	2%	1%	2%	4%	4%	2%	3%	6%
<b>Education Level</b>									
Bachelor's Degree or Higher	32%	38%	40%	35%	25%	30%	32%	46%	38%
Some College or Technical Training	33%	32%	36%	32%	33%	33%	35%	30%	31%
High School Grad or Less	35%	30%	24%	33%	42%	37%	33%	24%	31%
<b>Occupation</b>									
Executive, Professional, Technical	29%	35%	36%	32%	26%	30%	30%	40%	32%
Sales, Clerical	24%	30%	24%	28%	28%	24%	27%	24%	24%
Blue Collar	22%	14%	17%	20%	21%	22%	20%	16%	17%
Retired	15%	9%	8%	4%	14%	10%	5%	4%	13%
Homemaker	7%	6%	10%	11%	7%	9%	12%	13%	9%
Not Employed	4%	6%	4%	6%	4%	5%	6%	3%	5%
<b>Household Income</b>									
Below \$25,000	14%	7%	8%	9%	15%	15%	8%	5%	10%
\$25,000 - \$34,999	17%	8%	11%	13%	23%	23%	19%	11%	11%
\$35,000 - \$49,999	25%	23%	23%	22%	25%	27%	30%	20%	25%
\$50,000 - \$74,999	24%	25%	26%	29%	20%	20%	21%	30%	24%
\$75,000 or More	20%	38%	33%	27%	19%	15%	22%	34%	31%
<b>Readership</b>									
Daily	55%	53%	56%	47%	51%	53%	48%	49%	56%
Sunday	65%	68%	68%	62%	67%	63%	68%	66%	69%

# PREFERRED ADVERTISING SOURCES

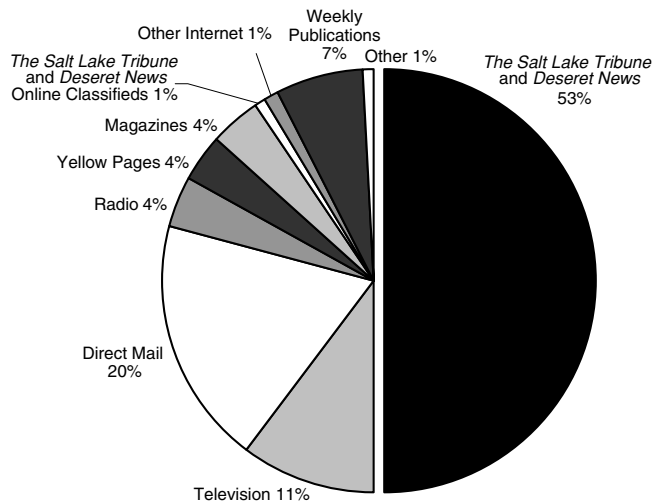
**Preferred advertising source for men's clothing.**



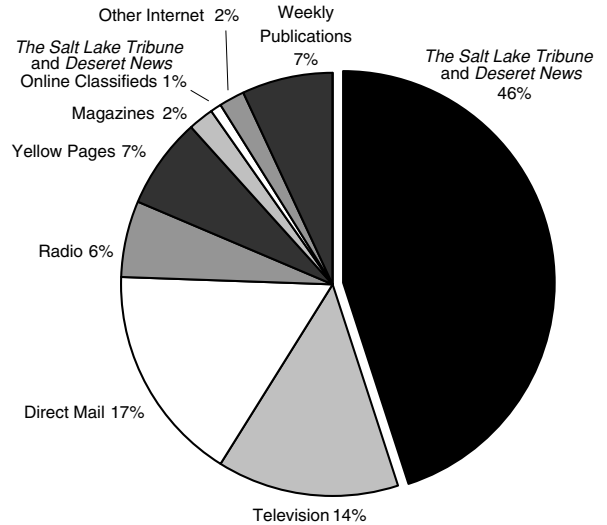
**Preferred advertising source for women's clothing.**



**Preferred advertising source for children's clothing.**



**Preferred advertising source for fine jewelry.**



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

## ATTITUDES ON CLOTHING

Percentage of adults who agree with the following statements.

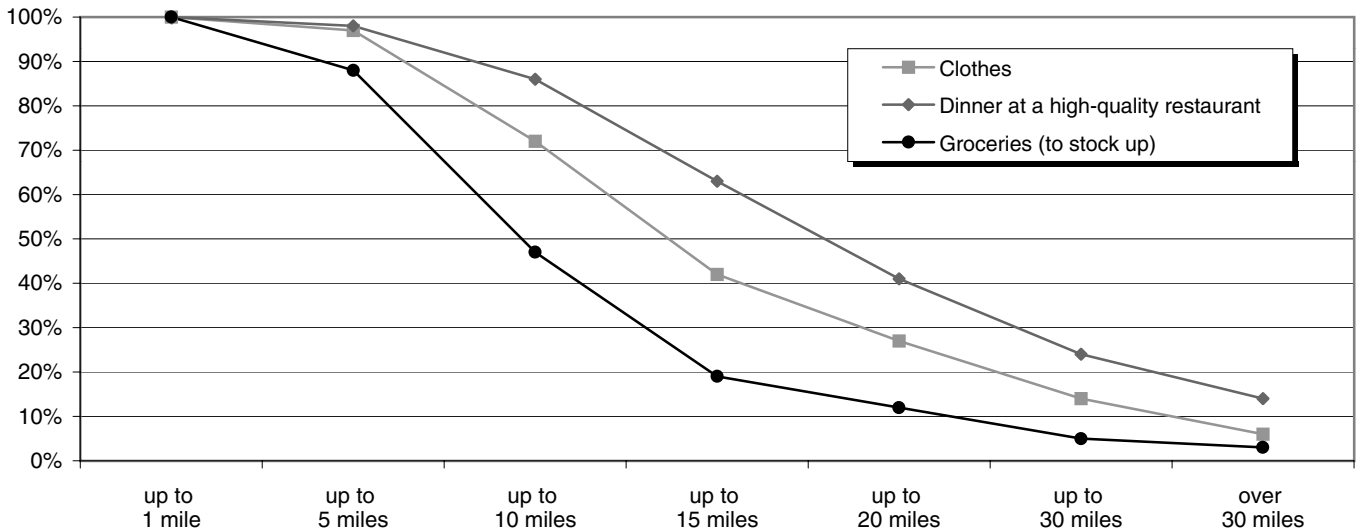
	All Adults	Men	Women
Looking fashionable is a high priority to me.	65%	59%	70%
I like knowing sales people who know me on a first-name basis.	56%	61%	51%
I don't mind spending more for clothing in a store with nice fixtures and displays.	27%	29%	25%
I'd rather do my day's shopping in one large store that has all the items I need.	73%	73%	72%
I watch the newspaper for sales on clothing.	59%	49%	69%

	All Adults	Men	Women
I buy a lot of clothes for my spouse or boyfriend/girlfriend.	50%	40%	57%
I buy children's clothes that are practical rather than trendy.	76%	75%	77%

*Note: The percentages of the previous two questions are based on those to whom the questions apply rather than the entire market.*

	All Adults	Men	Women
Percentage of adults who are quality conscious rather than price conscious for clothing.	38%	42%	33%

## DISTANCE SHOPPERS ARE WILLING TO TRAVEL



Type of Shopping Trip	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
Clothes	100%	97%	72%	42%	27%	14%	6%
Dinner at a high-quality restaurant	100%	98%	86%	63%	41%	24%	14%
Groceries (to stock up)	100%	88%	47%	19%	12%	5%	3%

**How to read:** 97 percent of adults are willing to travel up to 5 miles to buy clothes. Only 14 percent are willing to travel up to 30 miles.

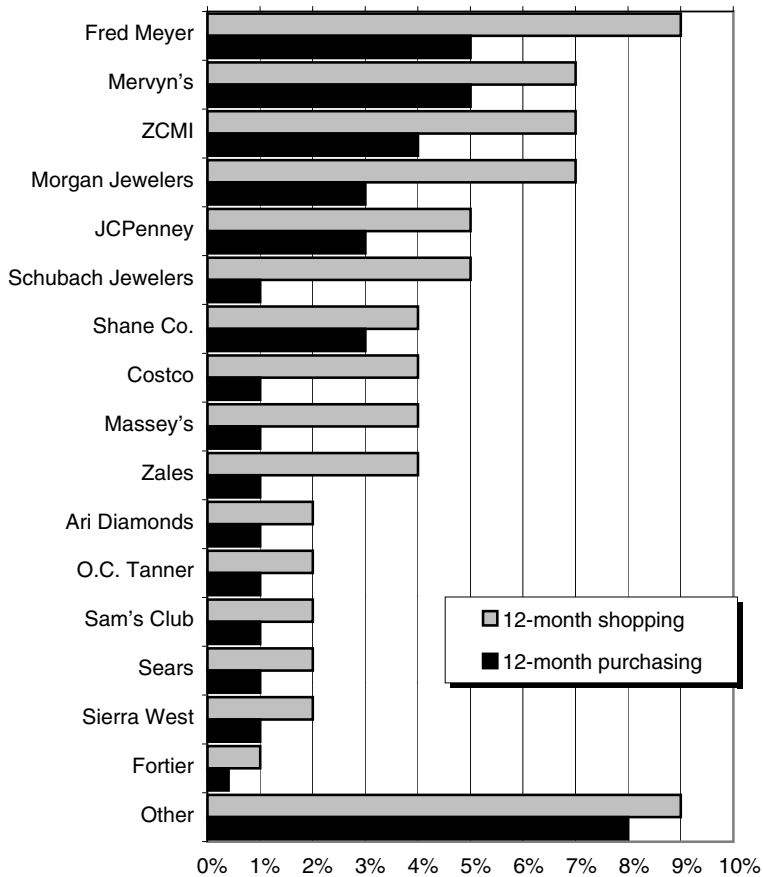
**Note:** The statistics for groceries and dining out are shown for comparison purposes.

# FINE JEWELRY STORE MARKET SHARE



	12-month shopping	12-month purchasing
Fred Meyer	9%	5%
Mervyn's	7%	5%
ZCMI	7%	4%
Morgan Jewelers	7%	3%
JCPenney	5%	3%
Schubach Jewelers	5%	1%
Shane Co.	4%	3%
Costco	4%	1%
Massey's	4%	1%
Zales	4%	1%
Ari Diamonds	2%	1%
O.C. Tanner	2%	1%
Sam's Club	2%	1%
Sears	2%	1%
Sierra West	2%	1%
Fortier	1%	0.4%
Other	9%	8%

**How to read:** 9 percent of adults have shopped at Fred Meyer for jewelry in the last 12 months with 5 percent making a purchase.

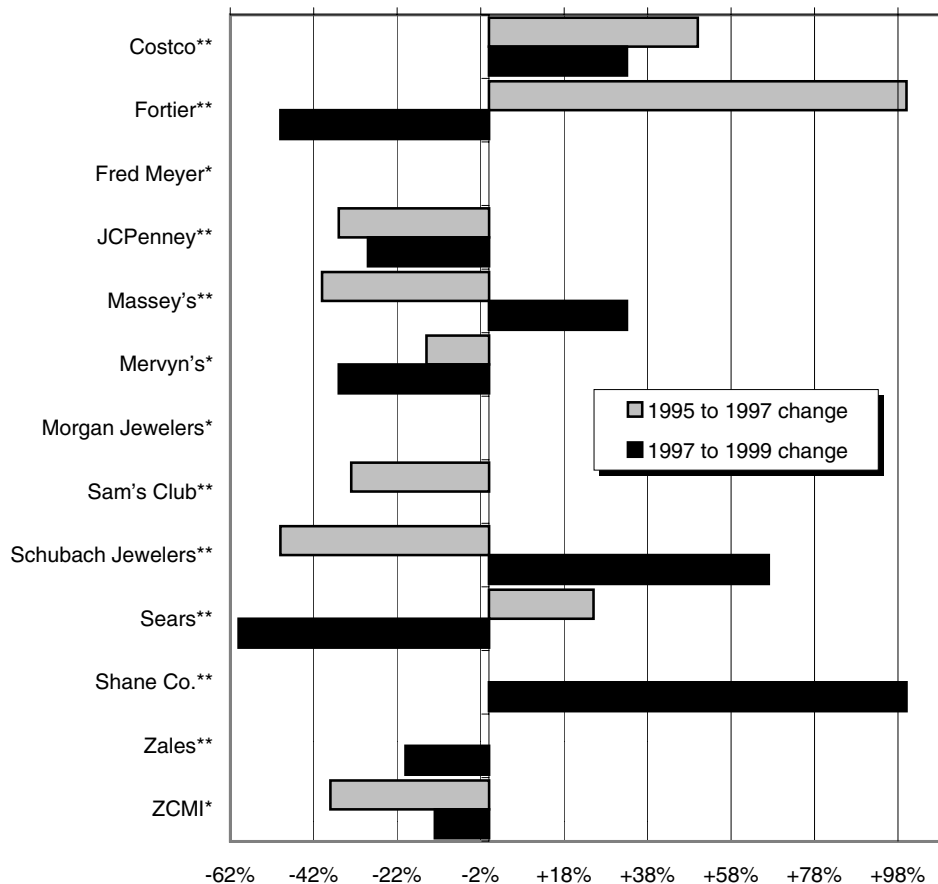


## FINE JEWELRY STORE MARKET SHARE TRENDS

	1995 12-month shopping	1997 12-months shopping	1995 to 1997 change	1999 12-month shopping	1997 to 1999 change
Costco**	2%	3%	+50%	4%	+33%
Fortier**	1%	2%	+100%	1%	-50%
Fred Meyer*	9%	9%	+0%	9%	+0%
JCPenney**	11%	7%	-36%	5%	-29%
Massey's**	5%	3%	-40%	4%	+33%
Mervyn's*	13%	11%	-15%	7%	-36%
Morgan Jewelers*	7%	7%	+0%	7%	+0%
Sam's Club**	3%	2%	-33%	2%	+0%
Schubach Jewelers**	6%	3%	-50%	5%	+67%
Sears**	4%	5%	+25%	2%	-60%
Shane Co.**	ns	2%	ns	4%	+100%
Zales**	ns	5%	ns	4%	-20%
ZCMI*	13%	8%	-38%	7%	-13%

**How to read:** This table shows the change in a store's market share from survey to survey. For example: Costco had a 50 percent increase in market share from 1995 to 1997, and a 33 percent increase from 1997 to 1999.

\*small sample size; interpret with caution  
 \*\*very small sample size; interpret with caution  
 ns=not surveyed



**NEWSPAPER AGENCY CORPORATION**

**ADVERTISING AGENT FOR THE SALT LAKE TRIBUNE AND DESERET NEWS**

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