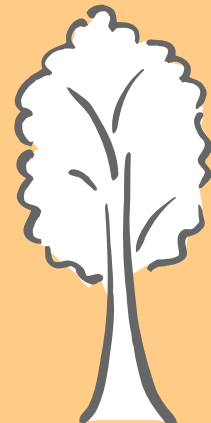
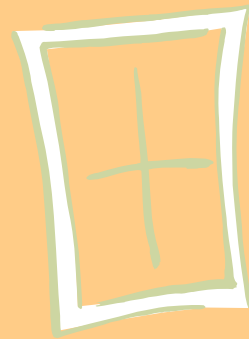
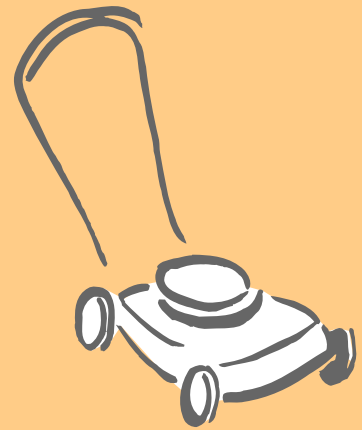
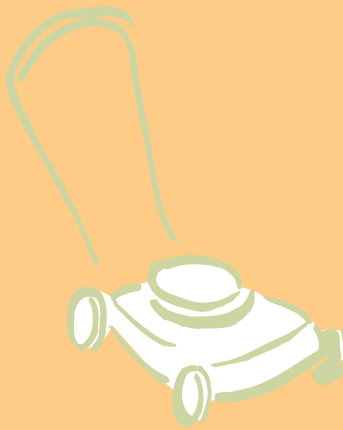


# Home & Garden

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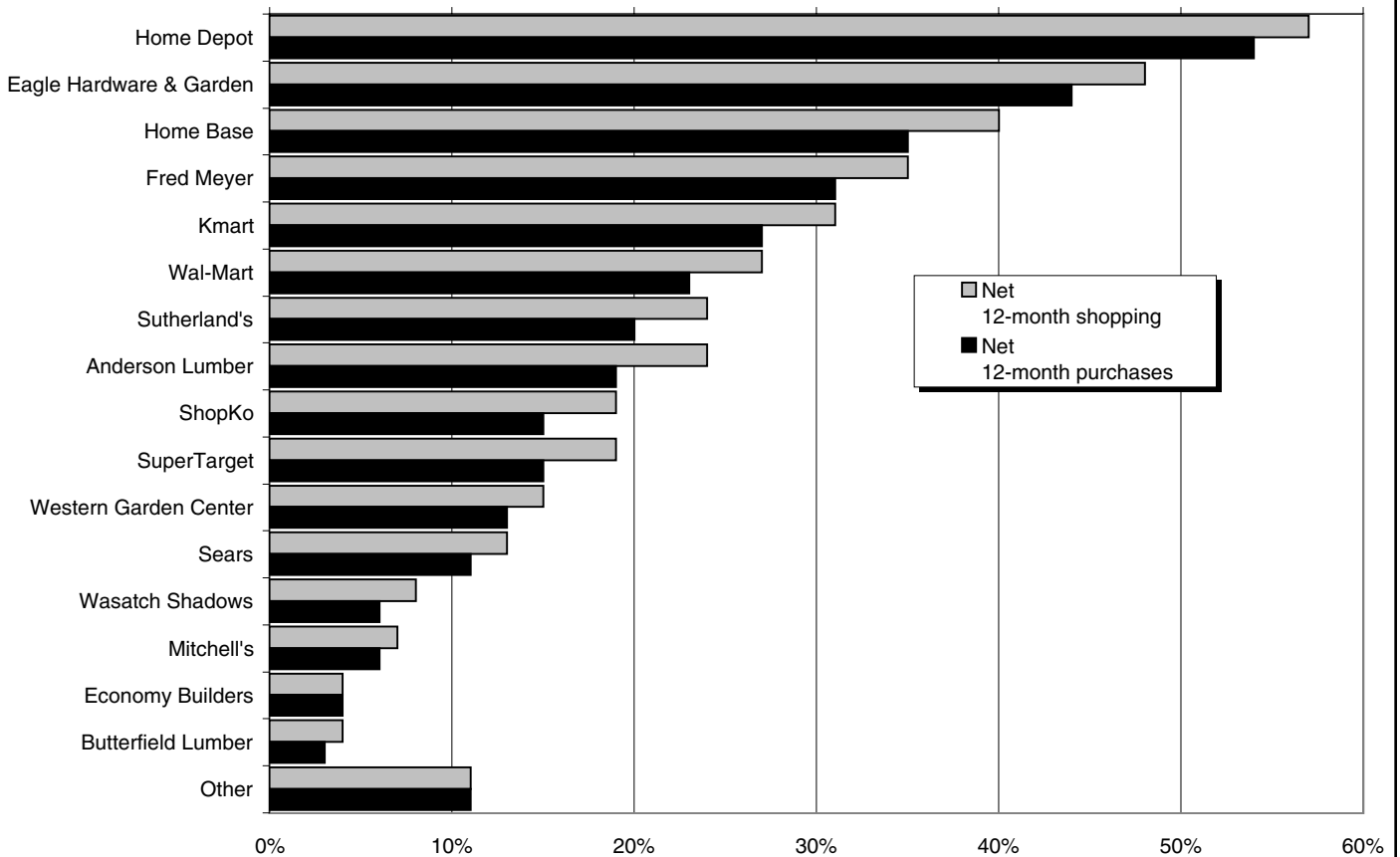
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Sources: All information in this statistical summary is from the Belden Associates, 1999 Survey of the Salt Lake Primary Market Area, unless otherwise noted.

## HOME AND GARDEN STORE MARKET SHARE

	Net 12-month shopping	Net 12-month purchases	Building or home improvement supplies shopping	Building or home improvement supplies purchases	Home decorating supplies shopping	Home decorating supplies purchases	Yard and garden supplies shopping	Yard and garden supplies purchases
Home Depot	57%	54%	54%	49%	24%	21%	33%	30%
Eagle Hardware & Garden	48%	44%	44%	40%	16%	12%	23%	22%
Home Base	40%	35%	36%	31%	13%	11%	16%	14%
Fred Meyer	35%	31%	23%	18%	13%	10%	21%	19%
Kmart	31%	27%	14%	10%	16%	13%	21%	18%
Wal-Mart	27%	23%	16%	10%	14%	11%	18%	15%
Sutherland's	24%	20%	22%	18%	6%	4%	9%	9%
Anderson Lumber	24%	19%	22%	18%	3%	2%	10%	8%
ShopKo	19%	15%	8%	6%	10%	8%	10%	8%
SuperTarget	19%	15%	6%	3%	12%	10%	8%	7%
Western Garden Center	15%	13%	4%	2%	1%	1%	13%	12%
Sears	13%	11%	10%	8%	4%	3%	5%	3%
Wasatch Shadows	8%	6%	2%	2%	1%	0%	7%	5%
Mitchell's	7%	6%	2%	1%	1%	1%	5%	5%
Economy Builders	4%	4%	4%	3%	1%	1%	1%	0%
Butterfield Lumber	4%	3%	3%	3%	1%	1%	0%	0%
Other	11%	11%	4%	4%	4%	3%	6%	6%

**How to read:** 57 percent of adults have shopped at Home Depot in the last 12 months with 54 percent making a purchase. 54 percent of adults have shopped at Home Depot for home improvement supplies with 49 percent purchasing.

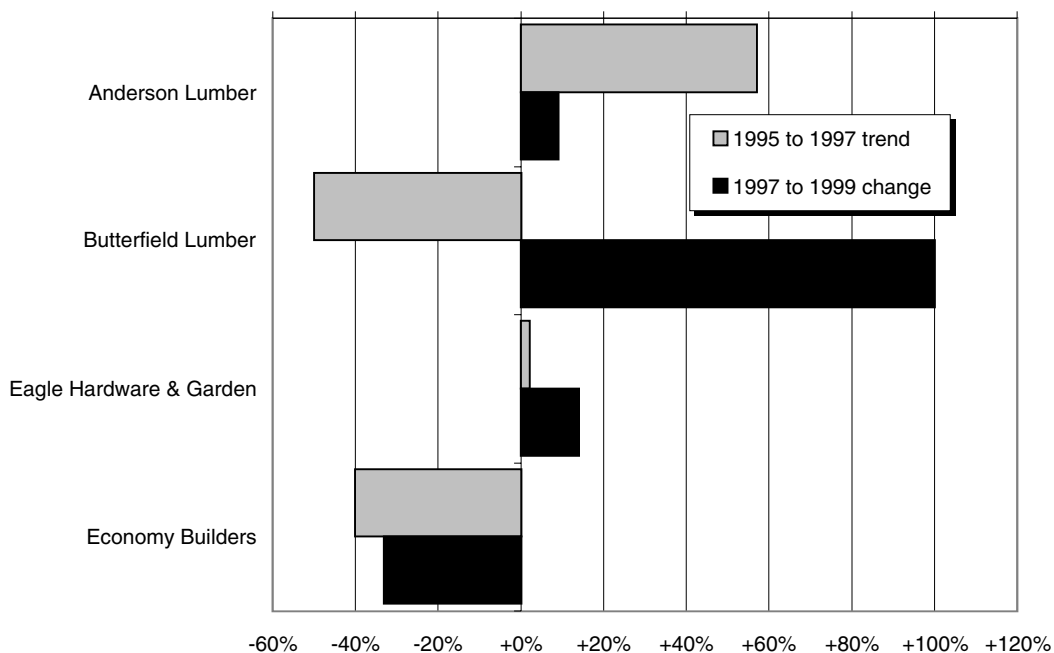


## HOME AND GARDEN STORE MARKET SHARE TRENDS

	1995 12-month shopping	1997 12-month shopping	1995 to 1997 trend	1999 12-month shopping	1997 to 1999 change
Anderson Lumber	14%	22%	+57%	24%	+9%
Butterfield Lumber	4%	2%	-50%	4%	+100%
Eagle Hardware & Garden	41%	42%	+2%	48%	+14%
Economy Builders	10%	6%	-40%	4%	-33%
Home Base	35%	37%	+6%	40%	+8%
Home Depot	20%	40%	+100%	57%	+43%
Sears	18%	17%	-6%	13%	-24%
Sutherland's	37%	34%	-8%	24%	-29%

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

**For example:** Anderson Lumber had a 22 percent increase in market share from 1995 to 1997 and a 9 percent increase from 1997 to 1999.



## HOME AND GARDEN STORE CROSS-SHOPPING PATTERNS

For adults who shopped for any item in the past 12 months.

	Anderson Lumber	Eagle Hardware & Garden	Fred Meyer	Home Base	Home Depot	Kmart	Mitchell's*
Anderson Lumber		74%	45%	54%	62%	37%	10%
Eagle Hardware & Garden	36%		45%	59%	67%	36%	12%
Fred Meyer	31%	63%		51%	68%	39%	13%
Home Base	32%	73%	45%		65%	39%	13%
Home Depot	26%	56%	41%	45%		36%	10%
Kmart	29%	56%	44%	51%	67%		10%
Mitchell's*	32%	82%	62%	72%	80%	44%	
Sears	31%	62%	62%	59%	82%	53%	5%
ShopKo	21%	59%	52%	55%	70%	68%	12%
SuperTarget	30%	59%	58%	51%	74%	56%	9%
Sutherland's	37%	57%	41%	53%	79%	38%	6%
Wal-Mart	30%	62%	49%	56%	66%	49%	7%
Wasatch Shadows*	58%	72%	62%	72%	69%	41%	29%
Western Garden Center	26%	55%	55%	55%	71%	33%	20%

	Sears	ShopKo	SuperTarget	Sutherland's	Wal-Mart	Wasatch Shadows*	Western Garden Center
Anderson Lumber	17%	17%	23%	38%	34%	19%	16%
Eagle Hardware & Garden	16%	23%	23%	29%	35%	11%	16%
Fred Meyer	23%	28%	31%	29%	39%	14%	23%
Home Base	19%	27%	24%	33%	39%	14%	20%
Home Depot	19%	23%	24%	34%	32%	9%	18%
Kmart	23%	42%	34%	30%	44%	10%	16%
Mitchell's*	8%	31%	23%	19%	27%	30%	40%
Sears		41%	40%	41%	38%	12%	30%
ShopKo	28%		43%	34%	51%	7%	18%
SuperTarget	28%	44%		25%	58%	10%	20%
Sutherland's	22%	26%	19%		32%	12%	16%
Wal-Mart	18%	35%	39%	29%		8%	14%
Wasatch Shadows*	20%	18%	24%	38%	30%		63%
Western Garden Center	27%	23%	25%	26%	27%	33%	

**How to read:** These tables show the percentage of a store's shoppers that also shop at other stores. **For example:** 74 percent of Anderson Lumber shoppers have also shopped at Eagle Hardware.

\*small sample size; interpret with caution

## HOME AND GARDEN STORE DEMOGRAPHIC PROFILES

For adults who shopped for any item in the past 12 months.

	Market	Anderson Lumber	Eagle Hardware & Garden	Fred Meyer	Home Base	Home Depot	Kmart	Mitchell's*
<b>Market Share</b>								
Percentage of Adults	100%	24%	48%	35%	40%	57%	31%	7%
Number of Adults	628,000	148,300	304,100	218,200	248,400	360,000	192,700	45,800
<b>Gender</b>								
Male	49%	64%	55%	44%	51%	56%	41%	51%
Female	51%	36%	45%	56%	49%	44%	59%	49%
<b>Age</b>								
18-24	13%	15%	10%	11%	12%	13%	11%	1%
25-34	21%	23%	24%	24%	23%	22%	25%	18%
35-44	24%	29%	27%	28%	27%	23%	27%	26%
45-54	18%	14%	20%	17%	16%	21%	15%	11%
55-64	10%	8%	10%	8%	13%	10%	12%	17%
65 or Older	14%	10%	9%	11%	10%	10%	10%	27%
<b>Homeownership</b>								
Own	75%	87%	82%	80%	81%	79%	82%	90%
Rent	25%	13%	18%	20%	19%	21%	18%	10%
<b>Marital Status</b>								
Married	67%	77%	74%	71%	70%	69%	74%	84%
Single	18%	13%	14%	15%	16%	17%	13%	6%
Divorced	10%	8%	9%	9%	9%	12%	9%	8%
Widowed	5%	2%	4%	5%	5%	3%	5%	3%
<b>Education Level</b>								
Bachelor's Degree or Higher	32%	31%	36%	36%	33%	34%	32%	44%
Some College or Technical Training	33%	33%	32%	33%	33%	33%	32%	38%
High School Grad or Less	35%	36%	32%	31%	35%	34%	36%	19%
<b>Occupation</b>								
Executive, Professional, Technical	29%	30%	33%	30%	30%	32%	26%	26%
Sales, Clerical	24%	20%	25%	23%	22%	23%	26%	9%
Blue Collar	22%	27%	23%	19%	24%	22%	21%	16%
Retired	15%	10%	10%	13%	13%	12%	13%	30%
Homemaker	7%	9%	7%	10%	7%	7%	10%	17%
Not Employed	4%	4%	2%	4%	4%	4%	5%	3%
<b>Household Income</b>								
Below \$25,000	14%	7%	9%	10%	9%	9%	9%	5%
\$25,000 - \$34,999	17%	10%	13%	16%	16%	16%	21%	10%
\$35,000 - \$49,999	25%	30%	29%	23%	24%	25%	25%	25%
\$50,000 - \$74,999	24%	29%	25%	27%	27%	25%	28%	37%
\$75,000 or More	20%	25%	25%	25%	23%	25%	17%	23%
<b>Readership</b>								
Daily	55%	56%	56%	57%	52%	56%	56%	61%
Sunday	65%	68%	69%	68%	67%	68%	72%	78%

\*small sample size; interpret with caution

## HOME AND GARDEN STORE DEMOGRAPHIC PROFILES (CONTINUED)

For adults who shopped for any item in the past 12 months.

	Market	Sears	ShopKo	Super-Target	Sutherland's	Wal-Mart	Wasatch Shadows*	Western Garden Center
<b>Market Share</b>								
Percentage of Adults	100%	13%	19%	19%	24%	27%	8%	15%
Number of Adults	628,000	81,200	119,100	115,900	152,500	172,100	47,300	91,200
<b>Gender</b>								
Male	49%	58%	36%	45%	61%	35%	48%	51%
Female	51%	42%	64%	55%	39%	65%	52%	49%
<b>Age</b>								
18-24	13%	8%	9%	10%	14%	11%	10%	2%
25-34	21%	24%	27%	34%	21%	26%	15%	16%
35-44	24%	23%	25%	23%	28%	28%	39%	29%
45-54	18%	16%	15%	16%	19%	16%	24%	20%
55-64	10%	13%	10%	8%	7%	9%	8%	14%
65 or Older	14%	15%	13%	10%	12%	11%	4%	18%
<b>Homeownership</b>								
Own	75%	86%	78%	78%	84%	79%	92%	90%
Rent	25%	14%	22%	22%	16%	22%	8%	10%
<b>Marital Status</b>								
Married	67%	71%	68%	69%	72%	71%	75%	73%
Single	18%	15%	18%	18%	14%	15%	14%	11%
Divorced	10%	8%	8%	10%	11%	9%	10%	8%
Widowed	5%	6%	7%	3%	3%	5%	1%	9%
<b>Education Level</b>								
Bachelor's Degree or Higher	32%	35%	36%	37%	30%	29%	38%	41%
Some College or Technical Training	33%	29%	33%	33%	31%	31%	28%	29%
High School Grad or Less	35%	36%	32%	30%	39%	40%	33%	30%
<b>Occupation</b>								
Executive, Professional, Technical	29%	32%	31%	28%	29%	28%	33%	32%
Sales, Clerical	24%	20%	22%	26%	22%	24%	27%	20%
Blue Collar	22%	19%	16%	18%	26%	20%	18%	17%
Retired	15%	18%	14%	11%	12%	12%	8%	21%
Homemaker	7%	7%	11%	9%	6%	10%	10%	7%
Not Employed	4%	4%	6%	8%	5%	6%	5%	4%
<b>Household Income</b>								
Below \$25,000	14%	11%	12%	5%	13%	9%	4%	10%
\$25,000 - \$34,999	17%	16%	21%	16%	19%	24%	11%	12%
\$35,000 - \$49,999	25%	20%	25%	24%	23%	32%	16%	20%
\$50,000 - \$74,999	24%	20%	26%	29%	24%	22%	33%	32%
\$75,000 or More	20%	33%	15%	26%	21%	14%	36%	28%
<b>Readership</b>								
Daily	55%	62%	54%	53%	55%	51%	52%	59%
Sunday	65%	75%	69%	67%	68%	69%	70%	65%

\*small sample size; interpret with caution

## HOME IMPROVEMENT PURCHASE INTENTIONS

	Number of adults	Percent of adults
Any home improvement costing \$200 or more	432,900	71%
Any landscaping or gardening improvement costing \$200 or more	340,200	56%
Wallpaper, paint or other wall coverings	317,100	51%
Draperies, blinds or other window shades	230,800	37%
Carpeting, linoleum, tiles or wood flooring	222,600	36%
Lighting fixtures	177,900	28%
Bathroom fixtures	156,100	25%
Kitchen fixtures	107,500	17%
Gas fireplace	52,600	8%
Spa or hot tub	48,400	8%

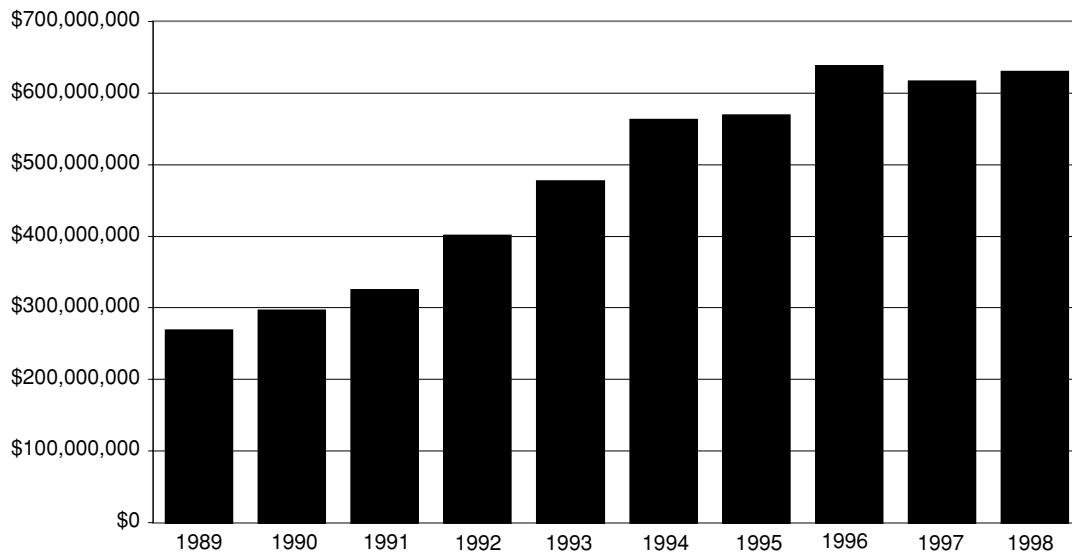
**How to read:** This table shows the percentage change in a store's market share from survey to survey. **For example:** Anderson Lumber had a 22 percent increase in market share from 1995 to 1997 and a 9 percent increase from 1997 to 1999.

## BUILDING AND GARDENING PURCHASES IN SALT LAKE COUNTY

Total retail building and gardening purchases in Salt Lake County.

Year	Sales
1989	\$268,468,519
1990	\$296,059,537
1991	\$324,602,686
1992	\$400,566,808
1993	\$476,075,500
1994	\$562,676,955
1995	\$568,669,518
1996	\$637,022,704
1997	\$616,236,787
1998	\$629,773,724

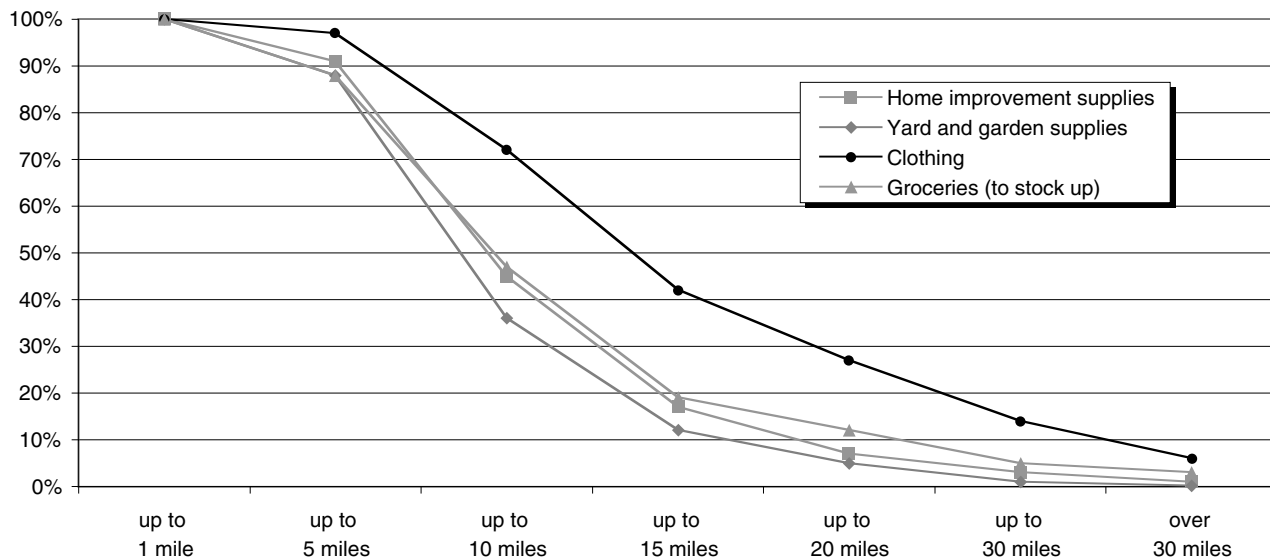
**Source:** Utah State Tax Commission September 1999.



## DEMOGRAPHIC PROFILES OF LIKELY HOME AND GARDEN PURCHASERS

	Market	Agree with:				Likely in the next 12 months to:	
		I've done a lot of work on my home.	My home still needs a lot of work.	I am a do-it-yourselfer.	I like to garden.	Make home improvements costing \$200 or more.	Make landscaping improvements of \$200 or more.
<b>Market Share</b>							
Percentage of Adults	100%	77%	64%	78%	72%	71%	56%
Number of Adults	628,000	478,000	396,000	480,800	446,100	432,900	340,200
<b>Gender</b>							
Male	49%	51%	51%	54%	47%	54%	55%
Female	51%	49%	49%	46%	53%	46%	45%
<b>Age</b>							
18-24	13%	11%	13%	15%	12%	10%	9%
25-34	21%	18%	23%	23%	22%	20%	24%
35-44	24%	26%	25%	25%	24%	28%	28%
45-54	18%	20%	19%	18%	18%	21%	20%
55-64	10%	11%	10%	9%	9%	12%	12%
65 or Older	14%	14%	10%	11%	15%	9%	7%
<b>Homeownership</b>							
Own	75%	81%	74%	74%	77%	82%	82%
Rent	25%	19%	26%	26%	24%	19%	18%
<b>Marital Status</b>							
Married	67%	71%	67%	69%	69%	71%	72%
Single	18%	14%	19%	18%	16%	14%	12%
Divorced	10%	10%	12%	10%	9%	11%	11%
Widowed	5%	4%	3%	3%	5%	4%	4%
<b>Education Level</b>							
Bachelor's Degree or Higher	32%	34%	29%	30%	32%	33%	37%
Some College or Technical Training	33%	33%	34%	33%	31%	33%	32%
High School Grad or Less	35%	33%	37%	36%	37%	34%	32%
<b>Occupation</b>							
Executive, Professional, Technical	29%	31%	29%	29%	29%	32%	35%
Sales, Clerical	24%	21%	25%	24%	24%	23%	22%
Blue Collar	22%	21%	23%	24%	21%	23%	24%
Retired	15%	16%	11%	13%	16%	11%	10%
Homemaker	7%	7%	7%	7%	8%	7%	7%
Not Employed	4%	3%	4%	4%	4%	4%	3%
<b>Household Income</b>							
Below \$25,000	14%	11%	14%	14%	15%	10%	8%
\$25,000 - \$34,999	17%	15%	19%	18%	17%	15%	13%
\$35,000 - \$49,999	25%	25%	24%	25%	25%	24%	24%
\$50,000 - \$74,999	24%	26%	24%	23%	23%	27%	27%
\$75,000 or More	20%	23%	19%	20%	20%	25%	28%
<b>Readership</b>							
Daily	55%	56%	53%	52%	54%	55%	56%
Sunday	65%	66%	63%	63%	66%	66%	67%

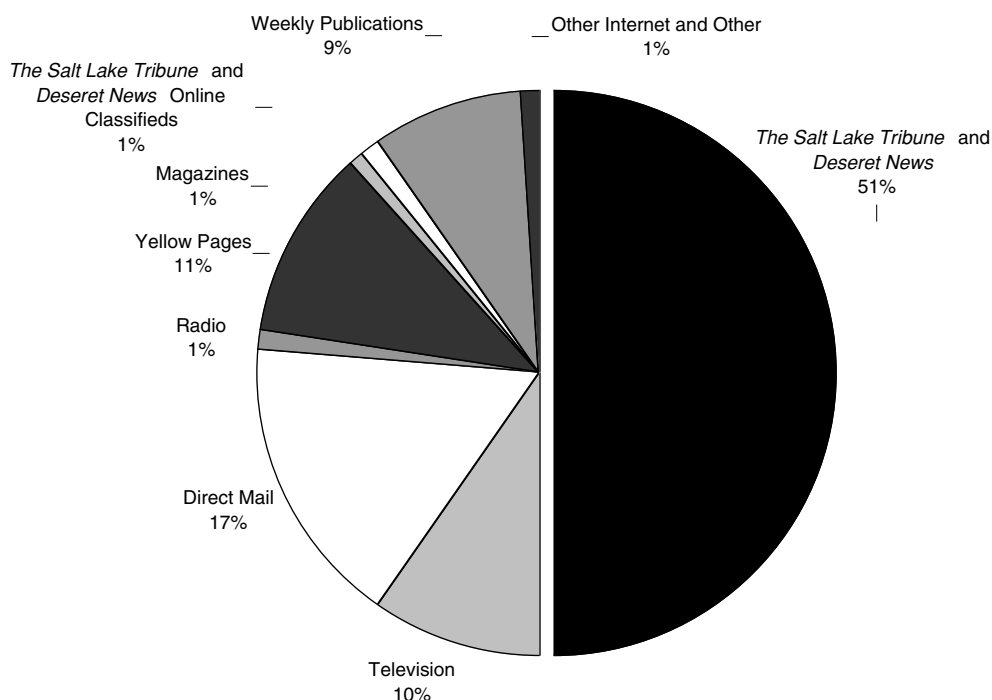
## DISTANCE SHOPPERS ARE WILLING TO TRAVEL



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
Home improvement supplies	100%	91%	45%	17%	7%	3%	1%
Yard and garden supplies	100%	88%	36%	12%	5%	1%	0%
Clothing	100%	97%	72%	42%	27%	14%	6%
Groceries (to stock up)	100%	88%	47%	19%	12%	5%	3%

**How to read:** 91 percent of adults are willing to travel up to five miles to buy home improvement supplies. Only 7 percent are willing to travel up to 20 miles. **Note:** The statistics for groceries and clothing are shown for comparison purposes.

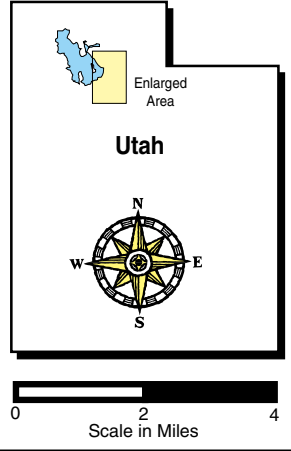
## PREFERRED ADVERTISING SOURCE FOR HOME IMPROVEMENT SUPPLIES



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

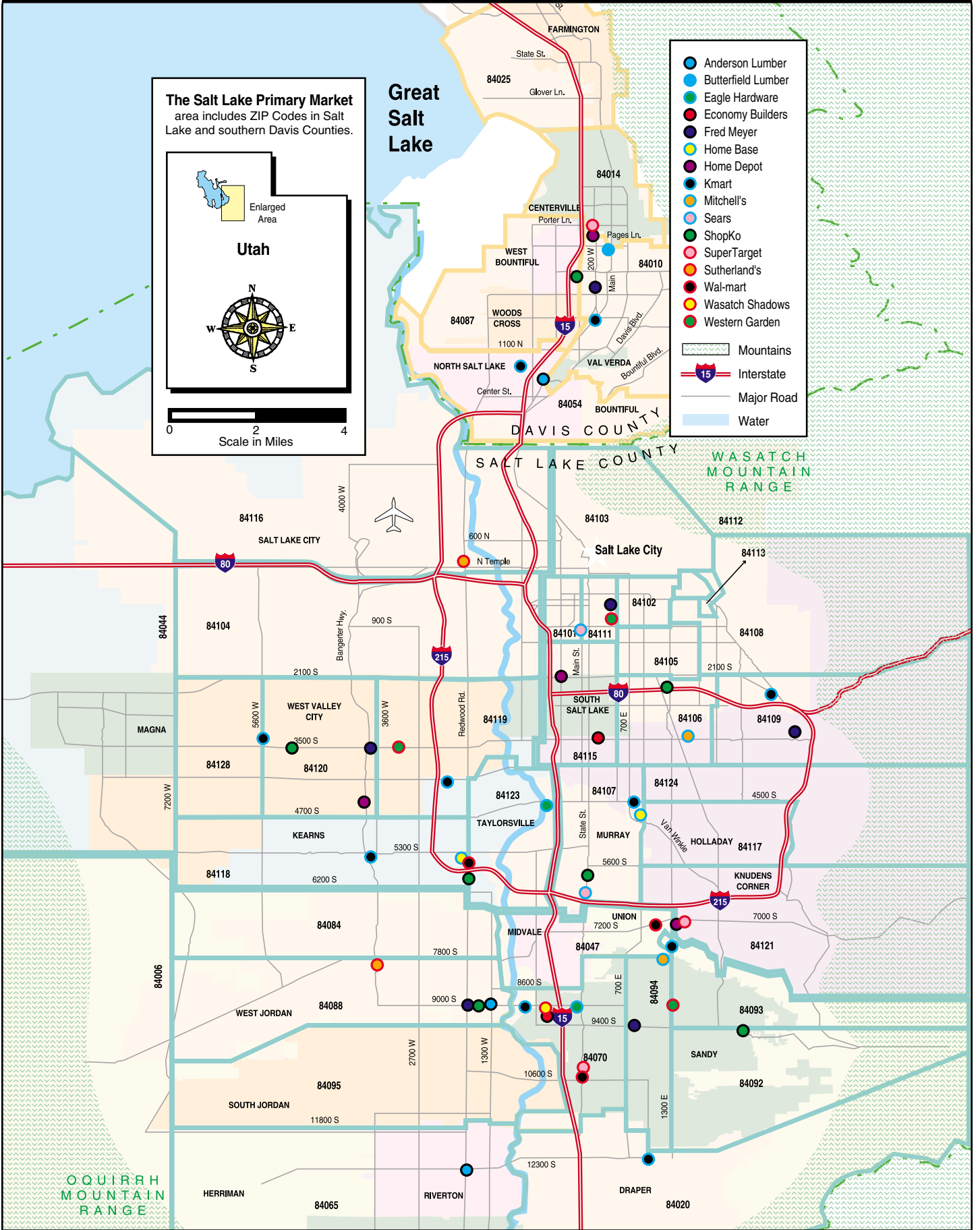
# HOME AND GARDEN STORES IN THE SALT LAKE PRIMARY MARKET

The Salt Lake Primary Market area includes ZIP Codes in Salt Lake and southern Davis Counties.



Great Salt Lake

- Anderson Lumber
  - Butterfield Lumber
  - Eagle Hardware
  - Economy Builders
  - Fred Meyer
  - Home Base
  - Home Depot
  - Kmart
  - Mitchell's
  - Sears
  - ShopKo
  - SuperTarget
  - Sutherland's
  - Wal-mart
  - Wasatch Shadows
  - Western Garden
- ▨ Mountains
  - Ⓜ Interstate
  - Major Road
  - ▭ Water



# NEWSPAPER AGENCY CORPORATION

ADVERTISING AGENT FOR THE SALT LAKE TRIBUNE AND DESERET NEWS

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