

Shopping Centers, Department, Discount & Bookstores

STATISTICAL SUMMARY OF THE SALT LAKE MARKET



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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.

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.

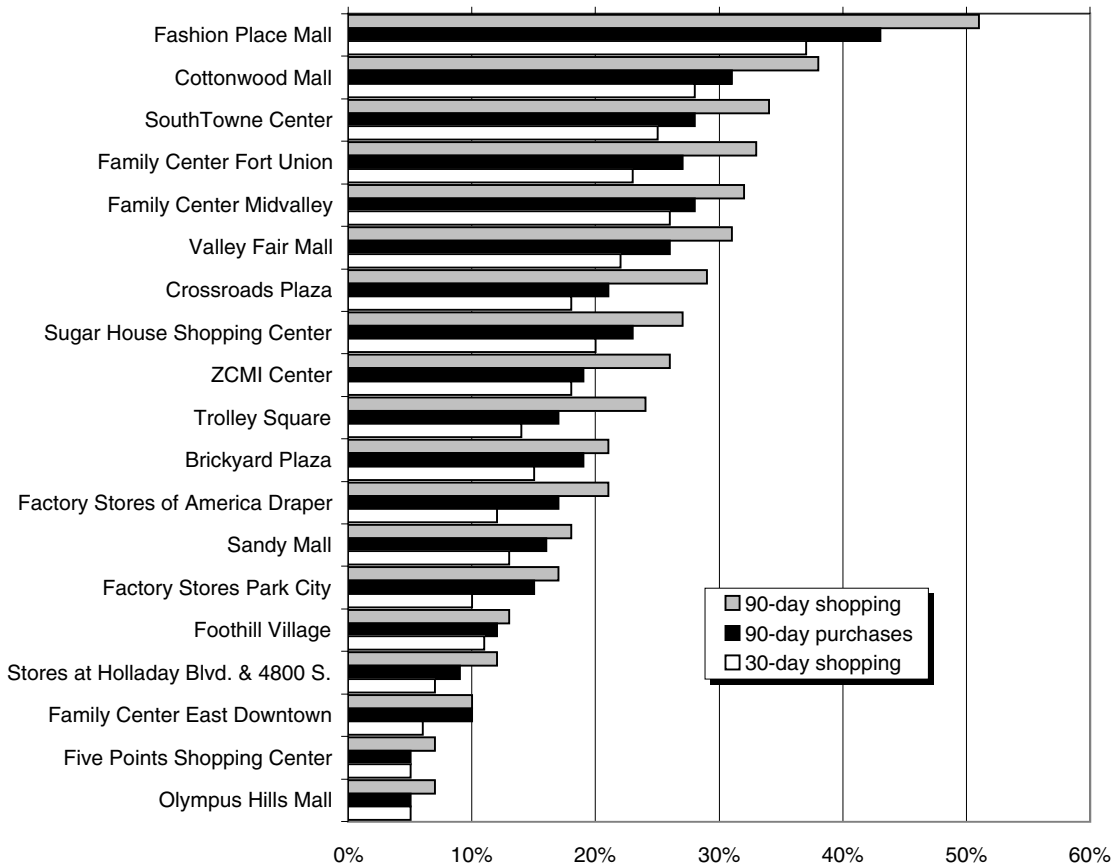
At Newspaper Agency Corporation, we are committed to maximizing the effectiveness of your advertising and bringing you the most for your investment. If you have any questions about this study and how your business can use this data to develop advertising strategies, please contact your account executive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



SHOPPING CENTER MARKET SHARE

	90-day shopping	90-day purchases	Average shopping trips in last 90 days	Percent of shoppers purchasing	30-day shopping
Fashion Place Mall	51%	43%	2.5	84%	37%
Cottonwood Mall	38%	31%	2.7	82%	28%
SouthTowne Center	34%	28%	2.5	82%	25%
Family Center Fort Union	33%	27%	2.6	82%	23%
Family Center Midvalley	32%	28%	3.1	88%	26%
Valley Fair Mall	31%	26%	2.8	84%	22%
Crossroads Plaza	29%	21%	2.4	72%	18%
Sugar House Shopping Center	27%	23%	2.8	85%	20%
ZCMI Center	26%	19%	2.5	73%	18%
Trolley Square	24%	17%	1.9	71%	14%
Brickyard Plaza	21%	19%	2.7	90%	15%
Factory Stores of America Draper	21%	17%	1.8	81%	12%
Sandy Mall	18%	16%	2.4	89%	13%
Factory Stores Park City	17%	15%	1.8	88%	10%
Foothill Village	13%	12%	2.8	92%	11%
Stores at Holladay Blvd. & 4800 S.	12%	9%	2.2	75%	7%
Family Center East Downtown	10%	10%	2.7	100%	6%
Five Points Shopping Center	7%	5%	2.3	71%	5%
Olympus Hills Mall	7%	5%	2.9	71%	5%

How to read: Fifty-one percent of adults in the market have shopped at Fashion Place Mall in the last 90 days. Forty-three percent have made a purchase. The average number of shopping trips in the past 90 days is 2.5, with 84 percent of trips resulting in a purchase. Thirty-seven percent of adults have shopped in the last 30 days.

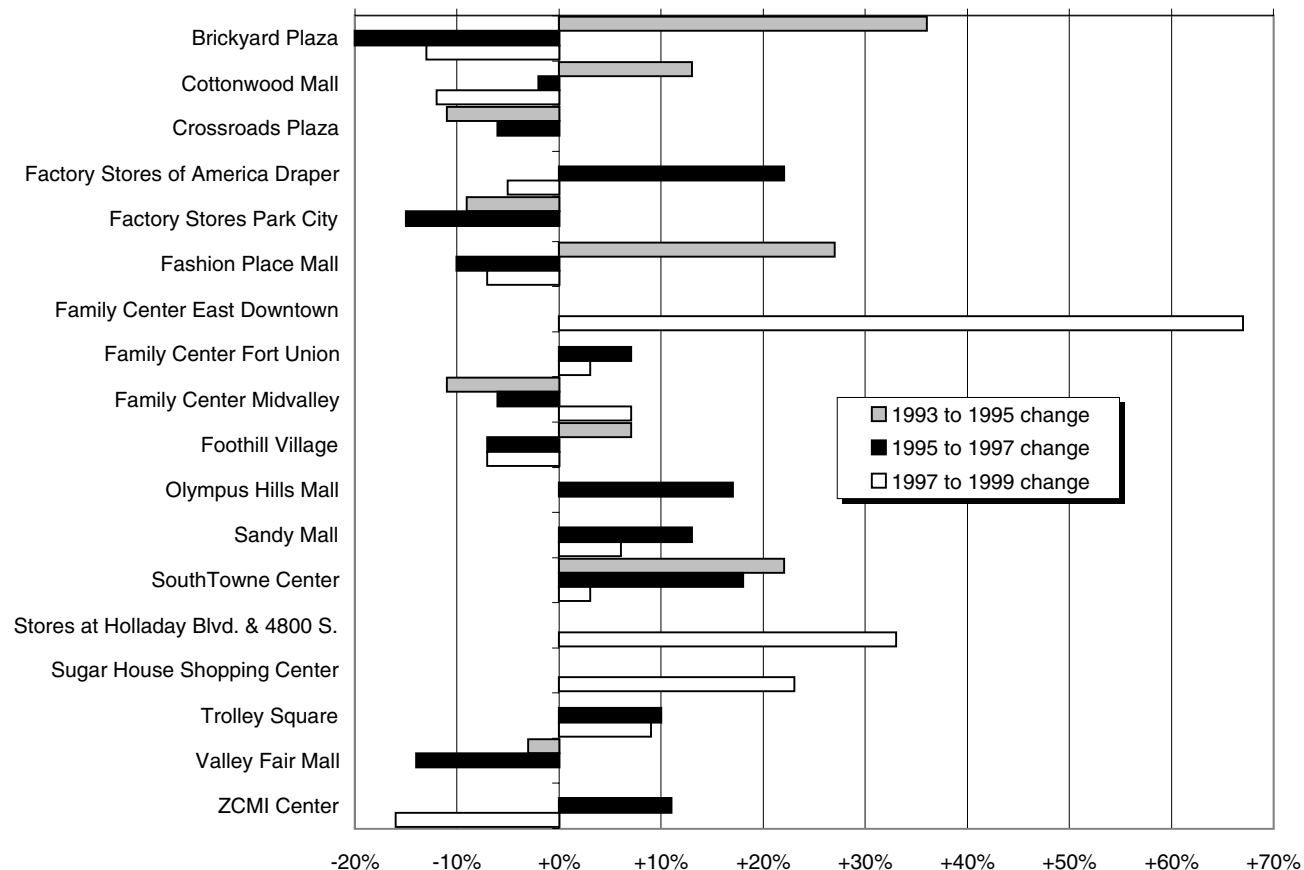


SHOPPING CENTER MARKET SHARE TRENDS

	1993 90-day shopping	1995 90-day shopping	1993 to 1995 change	1997 90-day shopping	1995 to 1997 change	1999 90-day shopping	1997 to 1999 change
Brickyard Plaza	22%	30%	+36%	24%	-20%	21%	-13%
Cottonwood Mall	39%	44%	+13%	43%	-2%	38%	-12%
Crossroads Plaza	35%	31%	-11%	29%	-6%	29%	+0%
Factory Stores of America Draper	18%	18%	+0%	22%	+22%	21%	-5%
Factory Stores Park City	22%	20%	-9%	17%	-15%	17%	+0%
Fashion Place Mall	48%	61%	+27%	55%	-10%	51%	-7%
Family Center East Downtown	ns	ns	ns	6%	ns	10%	+67%
Family Center Fort Union	ns	30%	ns	32%	+7%	33%	+3%
Family Center Midvalley	36%	32%	-11%	30%	-6%	32%	+7%
Foothill Village	14%	15%	+7%	14%	-7%	13%	-7%
Olympus Hills Mall	ns	6%	ns	7%	+17%	7%	+0%
Sandy Mall	15%	15%	+0%	17%	+13%	18%	+6%
SouthTowne Center	23%	28%	+22%	33%	+18%	34%	+3%
Stores at Holladay Blvd. & 4800 S.	ns	9%	ns	9%	+0%	12%	+33%
Sugar House Shopping Center	ns	ns	ns	22%	ns	27%	+23%
Trolley Square	20%	20%	+0%	22%	+10%	24%	+9%
Valley Fair Mall	37%	36%	-3%	31%	-14%	31%	+0%
ZCMI Center	28%	28%	+0%	31%	+11%	26%	-16%

How to read: In 1993, 22 percent of market adults shopped at Brickyard Plaza. In 1995, 30 percent shopped there representing a 36 percent increase. In 1997, 24 percent shopped, a 20 percent decrease from 1995. In 1999, 21 percent shopped, a 13 percent decrease from 1997.

ns = Not Surveyed



SHOPPING CENTER CROSS-SHOPPING PATTERNS

	Brickyard Plaza	Cottonwood Mall	Crossroads Plaza	Factory Stores of America	Factory Stores Park City	Family Center East Downtown	Family Center Fort Union	Family Center Midvalley	Fashion Place Mall	Five Points Shopping Center
Brickyard Plaza		76%	50%	12%	30%	24%	47%	17%	59%	7%
Cottonwood Mall	42%		42%	24%	26%	15%	51%	27%	76%	5%
Crossroads Plaza	36%	55%		19%	30%	23%	35%	32%	53%	11%
Factory Stores of America	12%	44%	26%		28%	10%	49%	31%	60%	9%
Factory Stores Park City	35%	55%	50%	34%		15%	44%	29%	64%	9%
Family Center East Downtown	50%	55%	67%	22%	26%		46%	33%	61%	9%
Family Center Fort Union	29%	58%	30%	31%	23%	14%		38%	77%	4%
Family Center Midvalley	11%	31%	29%	20%	16%	10%	40%		63%	5%
Fashion Place Mall	23%	56%	30%	24%	22%	11%	50%	40%		5%
Five Points Shopping Center	20%	29%	46%	27%	22%	13%	19%	23%	41%	
Foothill Village	52%	65%	57%	10%	35%	29%	40%	17%	57%	10%
Olympus Hills Mall	65%	76%	39%	5%	33%	21%	41%	24%	71%	8%
Sandy Mall	9%	48%	28%	55%	23%	7%	60%	27%	73%	7%
SouthTowne Center	18%	45%	30%	41%	21%	7%	49%	37%	72%	4%
Stores at Holladay Blvd. & 4800 S.	51%	73%	46%	16%	29%	28%	51%	32%	70%	13%
Sugar House Shopping Center	51%	60%	51%	16%	22%	25%	37%	23%	50%	6%
Trolley Square	44%	62%	65%	20%	35%	27%	44%	30%	60%	9%
Valley Fair Mall	18%	37%	34%	21%	16%	9%	30%	61%	67%	8%
ZCMI Center	32%	51%	73%	19%	25%	24%	33%	34%	55%	14%

	Foothill Village	Olympus Hills Mall	Sandy Mall	South-Towne Center	Stores at Holladay Blvd. & 4800 S.	Sugar House Shopping Center	Trolley Square	Valley Fair Mall	ZCMI Center
Brickyard Plaza	34%	21%	8%	30%	29%	67%	50%	26%	41%
Cottonwood Mall	23%	14%	23%	40%	23%	43%	40%	30%	35%
Crossroads Plaza	26%	9%	17%	35%	19%	48%	54%	35%	66%
Factory Stores of America	7%	2%	47%	68%	9%	21%	23%	31%	23%
Factory Stores Park City	27%	13%	24%	42%	20%	33%	47%	27%	37%
Family Center East Downtown	39%	14%	12%	24%	33%	67%	67%	28%	61%
Family Center Fort Union	16%	8%	32%	50%	18%	30%	32%	28%	25%
Family Center Midvalley	7%	5%	15%	39%	12%	19%	22%	58%	27%
Fashion Place Mall	15%	9%	25%	48%	16%	26%	28%	40%	28%
Five Points Shopping Center	20%	8%	17%	18%	22%	25%	33%	35%	51%
Foothill Village		28%	12%	16%	31%	76%	66%	20%	47%
Olympus Hills Mall	56%		4%	14%	53%	67%	55%	37%	33%
Sandy Mall	9%	2%		84%	11%	19%	27%	25%	23%
SouthTowne Center	6%	3%	43%		10%	20%	21%	33%	24%
Stores at Holladay Blvd. & 4800 S.	36%	30%	16%	27%		68%	49%	31%	40%
Sugar House Shopping Center	38%	17%	12%	25%	30%		51%	24%	43%
Trolley Square	37%	16%	20%	30%	24%	56%		27%	52%
Valley Fair Mall	9%	8%	14%	36%	12%	21%	22%		28%
ZCMI Center	25%	9%	16%	31%	18%	45%	49%	34%	

How to read: Of the adults that have shopped at Brickyard Plaza in the last 30 days, 76 percent have also shopped at Cottonwood Mall.

SHOPPING CENTER DEMOGRAPHIC PROFILES

For adults who shopped at a shopping center in the last 90 days.

	Market	Brickyard Plaza	Cottonwood Mall	Crossroads Plaza	Factory Stores of America Draper	Factory Stores Park City	Family Center East Downtown
Market Share							
Percentage of Adults	100%	21%	38%	29%	21%	17%	10%
Number of Adults	628,000	131,200	238,300	183,100	130,100	109,400	63,700
Gender							
Male	49%	46%	41%	45%	41%	53%	55%
Female	51%	54%	59%	55%	59%	47%	45%
Age							
18-24	13%	14%	14%	25%	11%	17%	19%
25-34	21%	21%	20%	24%	19%	32%	20%
35-44	24%	16%	24%	24%	23%	25%	19%
45-54	18%	18%	15%	9%	31%	15%	11%
55-64	10%	13%	12%	6%	10%	5%	17%
65 or Older	14%	18%	16%	11%	6%	7%	14%
Homeownership							
Own	75%	74%	76%	64%	84%	73%	74%
Rent	25%	26%	24%	36%	16%	27%	26%
Marital Status							
Married	67%	62%	65%	54%	75%	65%	55%
Single	18%	20%	20%	34%	12%	24%	36%
Divorced	10%	12%	9%	8%	11%	10%	8%
Widowed	5%	6%	6%	4%	2%	1%	1%
Education Level							
Bachelor's Degree or Higher	32%	44%	35%	32%	32%	42%	37%
Some College or Technical Training	33%	31%	34%	34%	33%	28%	32%
High School Grad or Less	35%	26%	31%	34%	35%	31%	31%
Occupation							
Executive, Professional, Technical	29%	33%	32%	32%	34%	38%	30%
Sales, Clerical	24%	20%	24%	30%	25%	25%	26%
Blue Collar	22%	17%	16%	18%	20%	20%	23%
Retired	15%	17%	17%	11%	8%	5%	15%
Homemaker	7%	9%	6%	5%	10%	10%	2%
Not Employed	4%	4%	3%	5%	3%	2%	4%
Household Income							
Below \$25,000	14%	10%	11%	15%	4%	8%	9%
\$25,000 - \$34,999	17%	12%	13%	17%	11%	10%	13%
\$35,000 - \$49,999	25%	28%	27%	27%	25%	20%	23%
\$50,000 - \$74,999	24%	23%	23%	18%	32%	22%	31%
\$75,000 or More	20%	27%	25%	24%	27%	39%	24%
Readership							
Daily	55%	58%	59%	54%	57%	58%	56%
Sunday	65%	75%	72%	68%	69%	72%	66%

SHOPPING CENTER DEMOGRAPHIC PROFILES (CONTINUED)

For adults who shopped at a shopping center in the last 90 days.

	Market	Family Center Fort Union	Family Center Midvalley	Fashion Place Mall	Five Points Shopping Center*	Foothill Village	Olympus Hills Mall*	Sandy Mall
Market Share								
Percentage of Adults	100%	33%	32%	51%	7%	13%	7%	18%
Number of Adults	628,000	209,400	202,200	320,300	44,200	84,200	42,000	112,900
Gender								
Male	49%	50%	51%	50%	49%	49%	63%	48%
Female	51%	50%	49%	50%	51%	51%	37%	52%
Age								
18-24	13%	11%	18%	15%	12%	18%	9%	17%
25-34	21%	25%	25%	21%	25%	20%	18%	21%
35-44	24%	21%	26%	26%	36%	30%	27%	32%
45-54	18%	18%	15%	16%	6%	13%	17%	18%
55-64	10%	15%	9%	11%	9%	10%	12%	5%
65 or Older	14%	11%	7%	13%	12%	8%	17%	8%
Homeownership								
Own	75%	80%	74%	78%	73%	69%	71%	78%
Rent	25%	20%	26%	22%	27%	31%	29%	22%
Marital Status								
Married	67%	71%	66%	67%	75%	57%	70%	76%
Single	18%	14%	19%	19%	10%	31%	17%	13%
Divorced	10%	12%	11%	11%	8%	7%	9%	8%
Widowed	5%	4%	4%	4%	7%	4%	4%	3%
Education Level								
Bachelor's Degree or Higher	32%	35%	25%	31%	43%	43%	44%	30%
Some College or Technical Training	33%	35%	36%	33%	30%	32%	31%	31%
High School Grad or Less	35%	30%	39%	36%	27%	25%	25%	39%
Occupation								
Executive, Professional, Technical	29%	31%	21%	27%	29%	44%	37%	32%
Sales, Clerical	24%	26%	26%	26%	19%	25%	19%	27%
Blue Collar	22%	19%	28%	20%	24%	15%	20%	21%
Retired	15%	14%	12%	16%	15%	6%	13%	8%
Homemaker	7%	7%	8%	7%	10%	6%	9%	9%
Not Employed	4%	3%	6%	5%	3%	5%	2%	5%
Household Income								
Below \$25,000	14%	8%	13%	10%	14%	16%	10%	13%
\$25,000 - \$34,999	17%	15%	23%	15%	20%	7%	10%	14%
\$35,000 - \$49,999	25%	25%	22%	27%	15%	18%	16%	26%
\$50,000 - \$74,999	24%	28%	26%	24%	30%	19%	23%	22%
\$75,000 or More	20%	25%	15%	25%	21%	41%	41%	26%
Readership								
Daily	55%	56%	50%	58%	54%	60%	71%	55%
Sunday	65%	66%	57%	68%	69%	69%	77%	70%

* Small sample size; interpret with caution.

SHOPPING CENTER DEMOGRAPHIC PROFILES (CONTINUED)

For adults who shopped at a shopping center in the last 90 days.

	Market	SouthTowne Center	Stores at Holladay Blvd & 4800 South	Sugar House Shopping Center	Trolley Square	Valley Fair Mall	ZCMI Center
Market Share							
Percentage of Adults	100%	34%	12%	27%	24%	31%	26%
Number of Adults	628,000	213,100	74,500	167,900	149,900	192,100	161,400
Gender							
Male	49%	52%	57%	48%	54%	45%	43%
Female	51%	48%	43%	52%	46%	55%	57%
Age							
18-24	13%	15%	22%	19%	16%	15%	18%
25-34	21%	22%	5%	20%	28%	19%	24%
35-44	24%	27%	21%	20%	24%	30%	27%
45-54	18%	19%	18%	16%	12%	16%	12%
55-64	10%	8%	11%	10%	9%	9%	7%
65 or Older	14%	9%	23%	16%	11%	12%	13%
Homeownership							
Own	75%	81%	74%	68%	69%	76%	70%
Rent	25%	20%	26%	32%	32%	24%	30%
Marital Status							
Married	67%	70%	65%	58%	59%	61%	60%
Single	18%	18%	24%	29%	28%	17%	26%
Divorced	10%	8%	8%	8%	9%	16%	9%
Widowed	5%	3%	3%	6%	3%	6%	4%
Education Level							
Bachelor's Degree or Higher	32%	32%	42%	35%	38%	22%	37%
Some College or Technical Training	33%	33%	29%	38%	35%	36%	35%
High School Grad or Less	35%	35%	29%	27%	28%	42%	28%
Occupation							
Executive, Professional, Technical	29%	31%	27%	32%	37%	25%	31%
Sales, Clerical	24%	25%	19%	24%	25%	28%	27%
Blue Collar	22%	22%	21%	19%	17%	22%	16%
Retired	15%	10%	21%	15%	12%	13%	13%
Homemaker	7%	8%	7%	6%	5%	7%	8%
Not Employed	4%	4%	5%	4%	4%	5%	6%
Household Income							
Below \$25,000	14%	8%	9%	15%	12%	16%	12%
\$25,000 - \$34,999	17%	12%	11%	15%	12%	22%	13%
\$35,000 - \$49,999	25%	26%	28%	30%	27%	24%	30%
\$50,000 - \$74,999	24%	28%	24%	18%	21%	20%	21%
\$75,000 or More	20%	26%	28%	22%	29%	19%	25%
Readership							
Daily	55%	59%	65%	56%	52%	54%	56%
Sunday	65%	70%	75%	66%	63%	63%	68%

SHOPPING CENTER SIZE AND MAJOR TENANTS

Shopping Center	Square Feet	Anchor Tenants over 50,000 square feet
Brickyard Plaza	282,830	Mervyn's
Cottonwood Mall	905,750	ZCMI, JCPenney
Crossroads Plaza	632,608	Nordstrom, Mervyn's
Factory Stores of America Draper	186,000	VF Factory Outlet
Factory Stores of America Park City	219,000	none
Family Center East Downtown	175,000	Fred Meyer
Family Center at Fort Union	622,340	Mervyn's, Smith's, Wal-Mart, Media Play
Family Center Midvalley	871,787	ShopKo, Media Play
Fashion Place Mall	970,722	Nordstrom, Dillard's, Sears
Five Points Shopping Center	188,000	none
Foothill Village	277,693	none
Olympus Hills Shopping Center	160,000	none
Sandy Mall	235,192	none
SouthTowne Center	930,233	ZCMI, JCPenney, Dillard's, Mervyn's
SouthTowne Marketplace	350,000	SuperTarget
Stores at Holladay Blvd & 4800 S.	95,410	none
Sugar House Shopping Center	349,560	ShopKo, Toys R Us
Trolley Square	239,000	none
Valley Fair Mall	608,000	ZCMI, JCPenney, Mervyn's

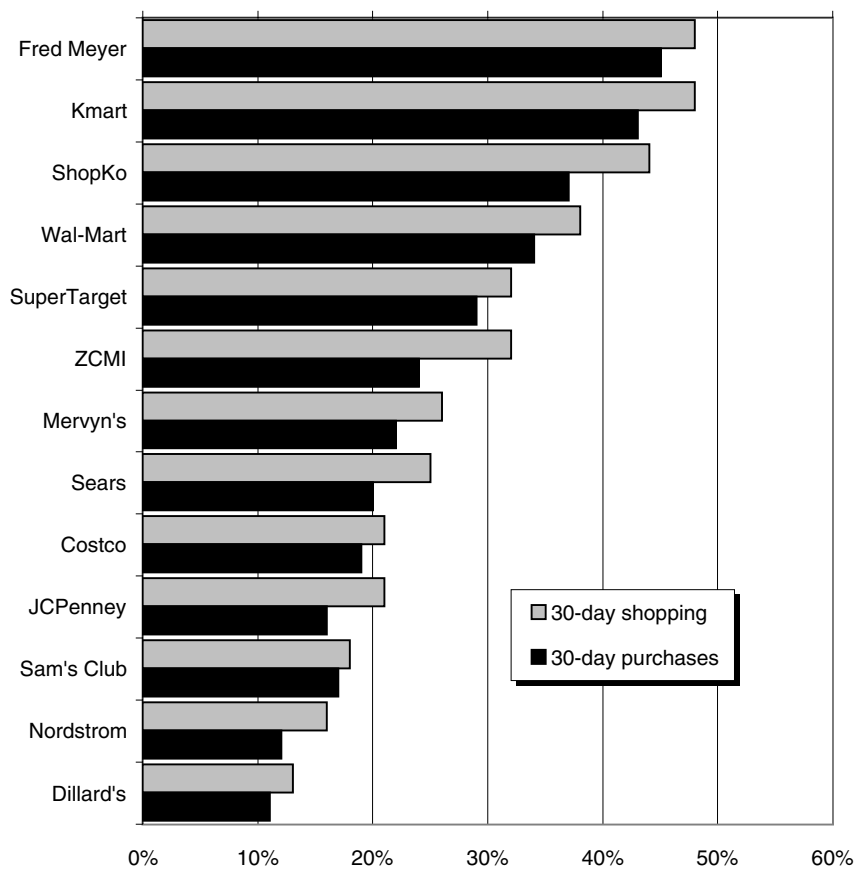
Source: Colliers Commerce CRG Salt Lake City Office, Factory Stores of America, September 1999.



DEPARTMENT AND DISCOUNT STORE MARKET SHARE

	30-day shopping	30-day purchases	Percent of shoppers purchasing
Fred Meyer	48%	45%	94%
Kmart	48%	43%	90%
ShopKo	44%	37%	84%
Wal-Mart	38%	34%	89%
SuperTarget	32%	29%	91%
ZCMI	32%	24%	75%
Mervyn's	26%	22%	85%
Sears	25%	20%	80%
Costco	21%	19%	90%
JCPenney	21%	16%	76%
Sam's Club	18%	17%	94%
Nordstrom	16%	12%	75%
Dillard's	13%	11%	85%

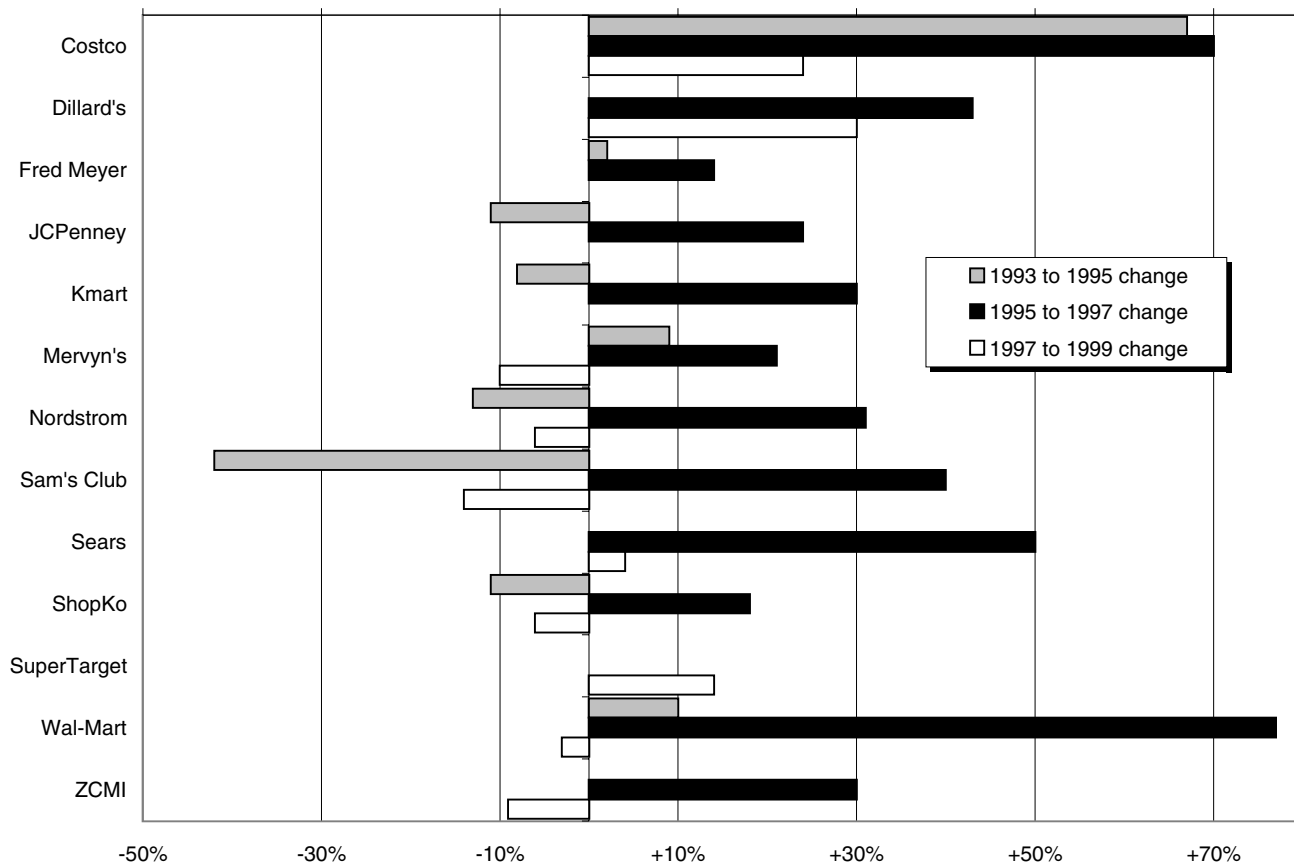
How to read: Twenty-one percent of adults in the Salt Lake Primary Market Area have shopped at Costco in the past 30 days; 19 percent have made a purchase. This indicates 90 percent of shoppers made a purchase.



DEPARTMENT AND DISCOUNT STORE MARKET SHARE TRENDS

	1993 30-day shopping	1995 30-day shopping	1993 to 1995 change	1997 30-day shopping	1995 to 1997 change	1999 30-day shopping	1997 to 1999 change
Costco	6%	10%	+67%	17%	+70%	21%	+24%
Dillard's	ns	7%	ns	10%	+43%	13%	+30%
Fred Meyer	41%	42%	+2%	48%	+14%	48%	+0%
JCPenney	19%	17%	-11%	21%	+24%	21%	+0%
Kmart	40%	37%	-8%	48%	+30%	48%	+0%
Mervyn's	22%	24%	+9%	29%	+21%	26%	-10%
Nordstrom	15%	13%	-13%	17%	+31%	16%	-6%
Sam's Club	26%	15%	-42%	21%	+40%	18%	-14%
Sears	16%	16%	+0%	24%	+50%	25%	+4%
ShopKo	45%	40%	-11%	47%	+18%	44%	-6%
SuperTarget	ns	ns	ns	28%	ns	32%	+14%
Wal-Mart	20%	22%	+10%	39%	+77%	38%	-3%
ZCMI	27%	27%	+0%	35%	+30%	32%	-9%

How to read: Six percent of adults shopped at Costco in 1993; 10 percent in 1995. This represents a 67 percent increase from 1993 to 1995.
ns = Not Surveyed



DEPARTMENT AND DISCOUNT STORE CROSS-SHOPPING PATTERNS

	Costco	Dillard's	Fred Meyer	JCPenney	Kmart	Mervyn's	Nordstrom
Costco		16%	54%	23%	51%	27%	18%
Dillard's	24%		54%	31%	50%	42%	45%
Fred Meyer	23%	15%		27%	55%	36%	18%
JCPenney	23%	20%	63%		63%	42%	20%
Kmart	22%	14%	55%	27%		34%	14%
Mervyn's	21%	21%	65%	33%	61%		26%
Nordstrom	23%	38%	57%	27%	42%	45%	
Sam's Club	24%	16%	55%	24%	61%	32%	17%
Sears	27%	20%	55%	37%	56%	32%	13%
ShopKo	24%	14%	63%	26%	62%	34%	15%
SuperTarget	23%	17%	54%	24%	52%	32%	18%
Wal-Mart	23%	16%	51%	26%	60%	32%	12%
ZCMI	25%	25%	60%	35%	48%	42%	31%

	Sam's Club	Sears	ShopKo	SuperTarget	Wal-Mart	ZCMI
Costco	21%	32%	51%	36%	41%	39%
Dillard's	21%	37%	47%	41%	45%	60%
Fred Meyer	20%	28%	57%	36%	40%	39%
JCPenney	20%	45%	55%	37%	47%	54%
Kmart	23%	29%	57%	35%	48%	32%
Mervyn's	22%	30%	57%	39%	45%	50%
Nordstrom	20%	21%	43%	37%	30%	62%
Sam's Club		31%	49%	38%	53%	36%
Sears	23%		56%	37%	48%	36%
ShopKo	20%	31%		38%	46%	34%
SuperTarget	21%	29%	52%		52%	37%
Wal-Mart	25%	31%	53%	44%		33%
ZCMI	20%	28%	48%	38%	39%	

How to read: Sixteen percent of Costco shoppers also shop at Dillard's. Fifty-four percent shop at Fred Meyer.



DEPARTMENT STORE DEMOGRAPHIC PROFILES

For adults who shopped at a department store in the last 30 days.

	Market	Dillard's	JCPenney	Mervyn's	Nordstrom	Sears	ZCMI
Market Share							
Percentage of Adults	100%	13%	21%	26%	16%	25%	32%
Number of Adults	628,000	83,500	130,100	165,700	97,500	154,900	198,600
Gender							
Male	49%	38%	44%	38%	46%	52%	39%
Female	51%	62%	56%	62%	54%	48%	61%
Age							
18-24	13%	12%	9%	13%	18%	9%	15%
25-34	21%	26%	18%	22%	20%	21%	16%
35-44	24%	25%	23%	27%	20%	23%	25%
45-54	18%	14%	18%	19%	23%	19%	18%
55-64	10%	8%	14%	8%	9%	13%	10%
65 or Older	14%	16%	18%	11%	11%	14%	17%
Homeownership							
Own	75%	82%	81%	76%	79%	79%	81%
Rent	25%	18%	19%	24%	21%	21%	20%
Marital Status							
Married	67%	70%	71%	69%	63%	73%	69%
Single	18%	17%	16%	16%	25%	13%	18%
Divorced	10%	8%	9%	9%	8%	10%	7%
Widowed	5%	5%	4%	6%	4%	4%	5%
Education Level							
Bachelor's Degree or Higher	32%	43%	28%	30%	43%	27%	39%
Some College or Technical Training	33%	33%	32%	36%	36%	30%	33%
High School Grad or Less	35%	25%	41%	34%	21%	43%	28%
Occupation							
Executive, Professional, Technical	29%	31%	22%	25%	35%	22%	30%
Sales, Clerical	24%	24%	26%	29%	27%	24%	27%
Blue Collar	22%	17%	18%	20%	18%	28%	14%
Retired	15%	14%	21%	12%	12%	17%	17%
Homemaker	7%	12%	9%	11%	7%	5%	9%
Not Employed	4%	3%	4%	3%	2%	4%	3%
Household Income							
Below \$25,000	14%	7%	11%	11%	8%	13%	12%
\$25,000 - \$34,999	17%	9%	15%	12%	9%	13%	12%
\$35,000 - \$49,999	25%	22%	28%	26%	20%	27%	27%
\$50,000 - \$74,999	24%	32%	29%	27%	23%	28%	24%
\$75,000 or More	20%	31%	18%	24%	41%	19%	26%
Readership							
Daily	55%	67%	60%	59%	63%	59%	62%
Sunday	65%	72%	73%	70%	72%	71%	69%

DISCOUNT STORE DEMOGRAPHIC PROFILES

For adults who shopped at a discount store in the last 30 days.

	Market	Costco	Fred Meyer	Kmart	Sam's Club	Shopko	Super-Target	Wal-Mart
Market Share								
Percentage of Adults	100%	21%	48%	48%	18%	44%	32%	38%
Number of Adults	628,000	130,500	304,000	299,500	112,800	276,000	202,300	238,200
Gender								
Male	49%	50%	47%	46%	59%	45%	45%	48%
Female	51%	50%	53%	54%	42%	55%	55%	52%
Age								
18-24	13%	8%	12%	10%	11%	13%	17%	11%
25-34	21%	20%	19%	20%	19%	20%	25%	23%
35-44	24%	24%	25%	26%	27%	26%	26%	28%
45-54	18%	23%	19%	16%	24%	17%	17%	16%
55-64	10%	12%	12%	12%	10%	10%	8%	10%
65 or Older	14%	14%	13%	16%	9%	14%	7%	12%
Homeownership								
Own	75%	88%	76%	79%	82%	74%	76%	75%
Rent	25%	12%	24%	21%	18%	26%	24%	25%
Marital Status								
Married	67%	79%	69%	72%	78%	68%	73%	70%
Single	18%	11%	16%	13%	10%	17%	17%	14%
Divorced	10%	7%	11%	9%	8%	11%	7%	11%
Widowed	5%	3%	5%	6%	4%	5%	3%	5%
Education Level								
Bachelor's Degree or Higher	32%	38%	36%	29%	36%	29%	36%	29%
Some College or Technical Training	33%	30%	33%	31%	32%	32%	31%	33%
High School Grad or Less	35%	31%	31%	40%	33%	39%	32%	38%
Occupation								
Executive, Professional, Technical	29%	30%	29%	23%	31%	25%	33%	26%
Sales, Clerical	24%	20%	25%	23%	24%	24%	27%	22%
Blue Collar	22%	25%	20%	25%	26%	23%	20%	26%
Retired	15%	17%	14%	18%	11%	16%	8%	14%
Homemaker	7%	8%	8%	8%	6%	7%	10%	8%
Not Employed	4%	1%	4%	3%	2%	5%	3%	4%
Household Income								
Below \$25,000	14%	10%	12%	15%	13%	15%	9%	13%
\$25,000 - \$34,999	17%	13%	15%	18%	14%	18%	17%	16%
\$35,000 - \$49,999	25%	23%	24%	26%	20%	28%	24%	28%
\$50,000 - \$74,999	24%	24%	27%	26%	29%	23%	28%	26%
\$75,000 or More	20%	30%	22%	16%	25%	17%	22%	18%
Readership								
Daily	55%	65%	58%	57%	52%	56%	57%	51%
Sunday	65%	75%	68%	68%	63%	67%	73%	65%

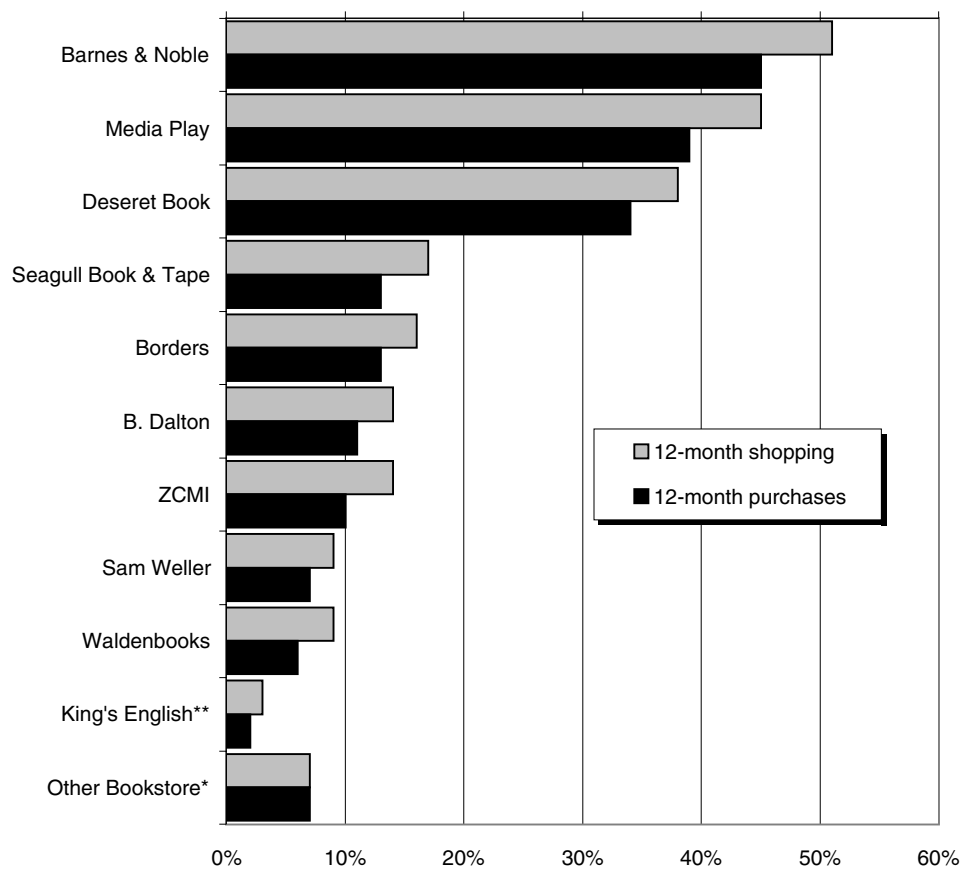
BOOKSTORE MARKET SHARE

	12-month shopping	12-month purchases	shopping trips per customer	Percent of shoppers purchasing
Barnes & Noble	51%	45%	2.7	88%
Media Play	45%	39%	2.6	87%
Deseret Book	38%	34%	2.6	89%
Seagull Book & Tape	17%	13%	2.2	76%
Borders	16%	13%	2.3	81%
B. Dalton	14%	11%	1.9	79%
ZCMI	14%	10%	2.5	71%
Sam Weller	9%	7%	2.2	78%
Waldenbooks	9%	6%	1.7	67%
King's English**	3%	2%	2.2	67%
Other Bookstore*	7%	7%	3.7	100%

How to read: Fifty-one percent of the adults in the market have shopped at Barnes & Noble in the last 12 months. Forty-five percent have made a purchase. The average number of shopping trips per customer is 2.7, with 88 percent of shoppers making a purchase.

*small sample size; interpret with caution

**very small sample size; interpret with caution



BOOKSTORE CROSS-SHOPPING PATTERNS

For adults who have shopped in the past 12 months.

	Barnes & Noble	B. Dalton	Borders	Deseret Book	King's English**	Media Play	Sam Weller	Seagull Book & Tape	Waldenbooks	ZCMI
Barnes & Noble		23%	27%	43%	5%	56%	13%	19%	13%	14%
B. Dalton	82%		24%	51%	4%	72%	22%	24%	32%	20%
Borders	86%	21%		48%	9%	68%	21%	14%	16%	15%
Deseret Book	58%	19%	20%		4%	53%	15%	34%	15%	25%
King's English**	75%	19%	45%	40%		50%	41%	8%	16%	16%
Media Play	64%	23%	25%	45%	4%		11%	21%	14%	18%
Sam Weller	77%	36%	39%	65%	16%	55%		35%	32%	20%
Seagull Book & Tape	59%	21%	13%	78%	2%	58%	18%		16%	32%
Waldenbooks	74%	50%	29%	60%	6%	70%	30%	29%		25%
ZCMI	55%	21%	18%	68%	4%	58%	13%	39%	17%	

How to read: Twenty-three percent of Barnes & Noble shoppers have also shopped at B. Dalton in the last 12 months.

** very small sample size; interpret with caution



BOOKSTORE DEMOGRAPHIC PROFILES

For adults who have shopped in the past 12 months.

	Market	Barnes & Noble	B. Dalton	Borders	Deseret Book	King's English
Market Share						
Percentage of Adults	100%	51%	14%	16%	38%	3%
Number of Adults	628,000	321,800	90,400	102,000	237,700	20,800
Gender						
Male	49%	49%	44%	58%	45%	64%
Female	51%	51%	56%	42%	56%	36%
Age						
18-24	13%	15%	11%	20%	10%	9%
25-34	21%	24%	24%	29%	18%	32%
35-44	24%	23%	28%	28%	24%	12%
45-54	18%	20%	19%	15%	20%	27%
55-64	10%	10%	11%	4%	12%	9%
65 or Older	14%	9%	8%	4%	16%	11%
Homeownership						
Own	75%	74%	76%	66%	82%	79%
Rent	25%	26%	24%	34%	18%	21%
Marital Status						
Married	67%	68%	67%	61%	75%	57%
Single	18%	20%	18%	28%	12%	16%
Divorced	10%	8%	11%	9%	7%	13%
Widowed	5%	4%	4%	2%	6%	14%
Education Level						
Bachelor's Degree or Higher	32%	42%	38%	43%	38%	44%
Some College or Technical Training	33%	33%	39%	30%	33%	28%
High School Grad or Less	35%	25%	23%	27%	29%	28%
Occupation						
Executive, Professional, Technical	29%	37%	36%	36%	34%	32%
Sales, Clerical	24%	23%	26%	29%	20%	18%
Blue Collar	22%	19%	18%	21%	17%	25%
Retired	15%	11%	10%	5%	17%	13%
Homemaker	7%	7%	7%	5%	8%	10%
Not Employed	4%	3%	4%	4%	4%	2%
Household Income						
Below \$25,000	14%	11%	10%	12%	9%	2%
\$25,000 - \$34,999	17%	14%	14%	15%	16%	16%
\$35,000 - \$49,999	25%	22%	30%	23%	24%	26%
\$50,000 - \$74,999	24%	25%	22%	17%	25%	27%
\$75,000 or More	20%	28%	25%	33%	26%	29%
Readership						
Daily	55%	56%	59%	56%	57%	58%
Sunday	65%	68%	68%	67%	68%	51%

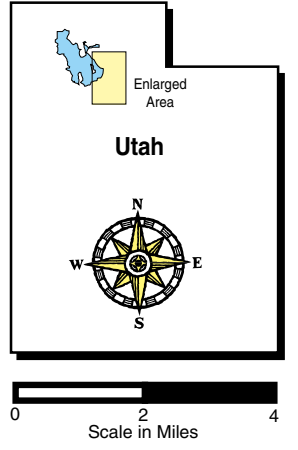
BOOKSTORE DEMOGRAPHIC PROFILES (CONTINUED)

For adults who have shopped in the past 12 months.

	Market	Media Play	Sam Weller	Seagull Book & Tape	Waldenbooks	ZCMI
Market Share						
Percentage of Adults	100%	55%	9%	17%	9%	14%
Number of Adults	628,000	281,600	54,500	105,100	57,800	85,200
Gender						
Male	49%	45%	42%	33%	37%	33%
Female	51%	55%	58%	67%	64%	68%
Age						
18-24	13%	17%	9%	10%	11%	16%
25-34	21%	23%	31%	17%	31%	17%
35-44	24%	29%	9%	22%	25%	24%
45-54	18%	20%	21%	17%	12%	17%
55-64	10%	7%	5%	17%	11%	10%
65 or Older	14%	5%	25%	18%	10%	16%
Homeownership						
Own	75%	75%	73%	81%	76%	79%
Rent	25%	25%	27%	19%	24%	21%
Marital Status						
Married	67%	64%	72%	76%	73%	62%
Single	18%	24%	12%	13%	17%	20%
Divorced	10%	10%	9%	5%	7%	9%
Widowed	5%	3%	7%	6%	3%	8%
Education Level						
Bachelor's Degree or Higher	32%	33%	41%	37%	37%	34%
Some College or Technical Training	33%	34%	29%	31%	34%	29%
High School Grad or Less	35%	32%	30%	32%	29%	36%
Occupation						
Executive, Professional, Technical	29%	33%	35%	32%	29%	26%
Sales, Clerical	24%	30%	19%	15%	28%	27%
Blue Collar	22%	20%	13%	19%	15%	17%
Retired	15%	6%	23%	19%	12%	14%
Homemaker	7%	7%	7%	10%	13%	9%
Not Employed	4%	4%	3%	6%	4%	9%
Household Income						
Below \$25,000	14%	11%	16%	10%	8%	12%
\$25,000 - \$34,999	17%	17%	18%	17%	14%	16%
\$35,000 - \$49,999	25%	23%	21%	27%	27%	24%
\$50,000 - \$74,999	24%	25%	15%	34%	25%	28%
\$75,000 or More	20%	25%	30%	12%	26%	19%
Readership						
Daily	55%	54%	58%	56%	56%	55%
Sunday	65%	66%	70%	73%	74%	71%

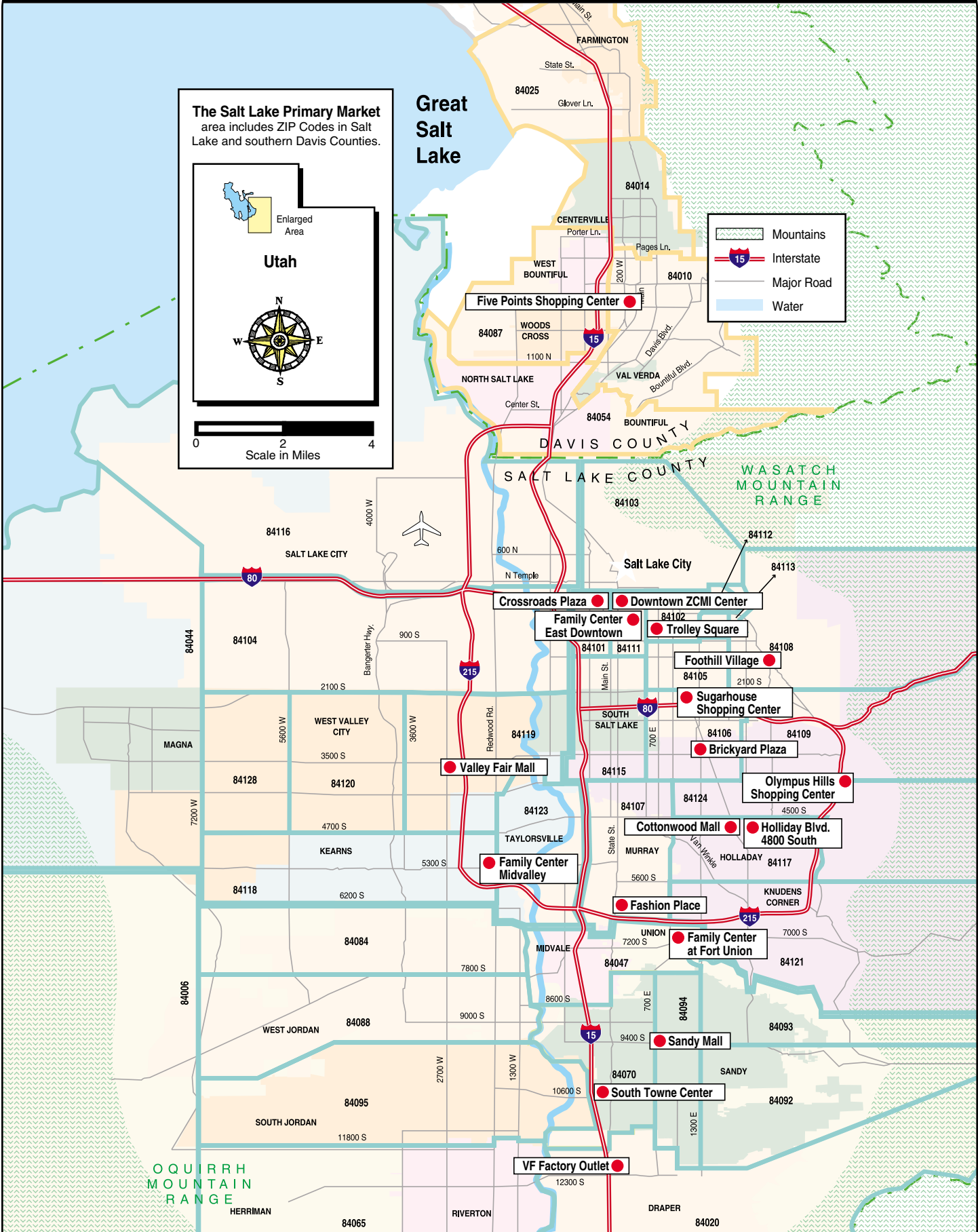
SHOPPING CENTERS IN THE SALT LAKE PRIMARY MARKET

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



Great Salt Lake

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