

# Home and Garden

STATISTICAL SUMMARY OF THE SALT LAKE MARKET

Newspaper Agency Corporation  
The Salt Lake Tribune DESERT Morning News

# Introduction and Methodology

Advertising is essential in today's business climate – and market research is crucial in developing a competitive edge. The information contained in this statistical summary is intended to give you added confidence when making the important marketing decisions that guide the future course of your business.

At Newspaper Agency Corporation, we commission in-depth studies of the Salt Lake market to arm our advertisers with insight into the consumer habits of Salt Lake residents. Included in the 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 2003 Survey of the Salt Lake Primary Market conducted by Belden Associates, an independent, nationally recognized research firm that has a reputation for employing the highest technical standards in the industry.

The 2003 study highlights shopping and purchasing behavior, intentions and attitudes of adults in the Salt Lake primary market area, which comprises 714,000 adults in Salt Lake and southern Davis counties. Using a random sample survey design that included a phone interview of 1,242 respondents, followed by a mailed self-administered questionnaire, Belden is able to compile an exhaustive profile of Salt Lake's consumers. This information will enhance your position in the market and ensure *The Salt Lake Tribune* and *Deseret Morning News* are a part of your successful advertising plan. In other words, our success depends on your success.

At NAC, 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 at (801) 237-2958 or e-mail [nacmark@nacorp.com](mailto:nacmark@nacorp.com).



**For more information contact your NAC account executive or call (801) 237-2815**

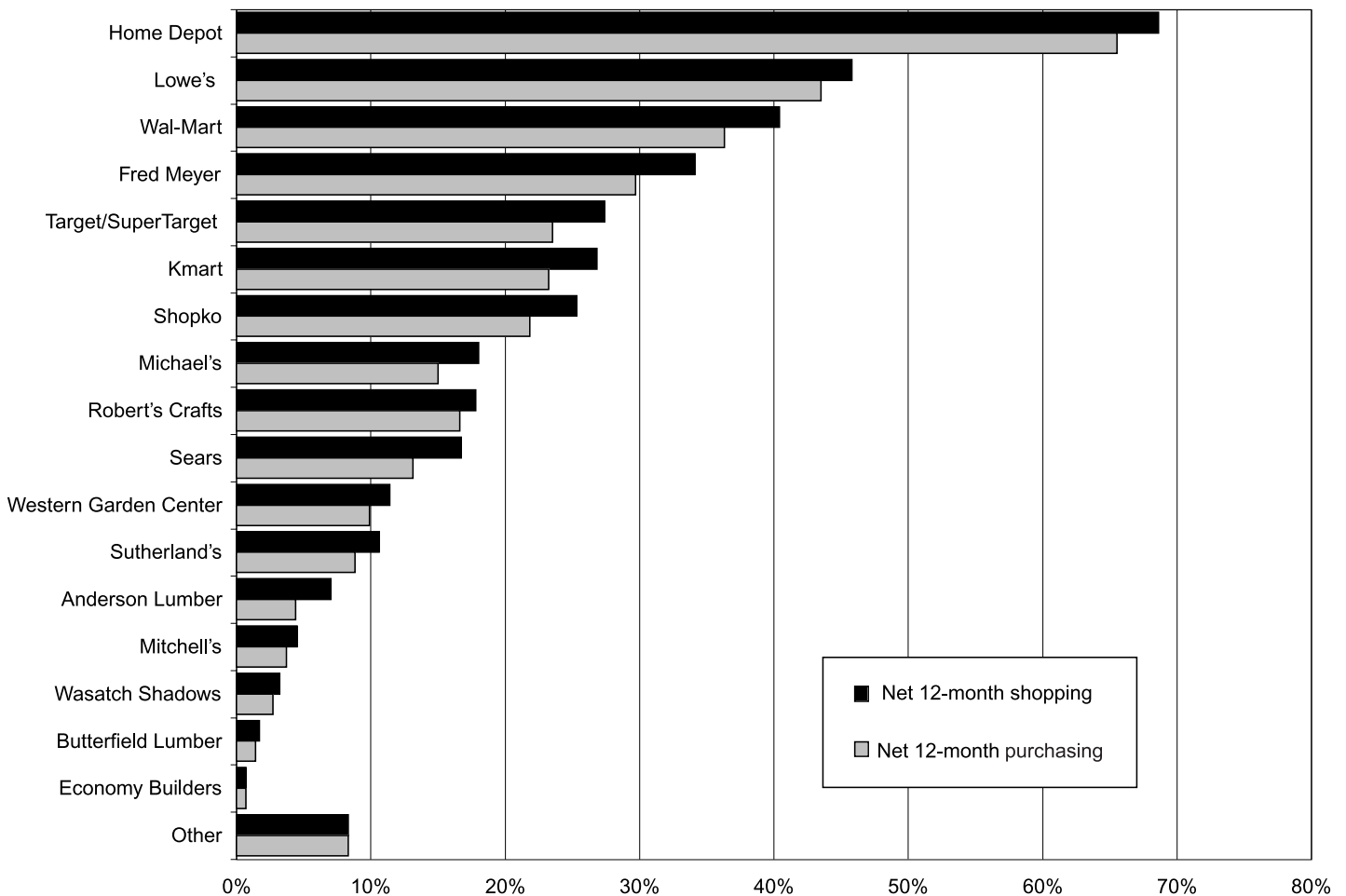
**Newspaper Agency Corporation**  
The Salt Lake Tribune DESERET Morning News

STATISTICAL SUMMARY OF THE  
SALT LAKE MARKET

# HOME AND GARDEN STORE MARKET SHARE

	Net 12-month shopping	Net 12-month purchasing	Building or Home Improvement Supplies		Home Decorating Supplies		Yard or Garden Supplies	
			Shopped	Purchased	Shopped	Purchased	Shopped	Purchased
Home Depot	69%	66%	64%	61%	30%	27%	44%	42%
Lowe's	46%	44%	41%	38%	18%	16%	21%	19%
Wal-Mart	40%	36%	20%	18%	27%	24%	22%	19%
Fred Meyer	34%	30%	20%	17%	18%	15%	21%	18%
Target/SuperTarget	27%	24%	11%	8%	22%	19%	5%	5%
Kmart	27%	23%	13%	10%	16%	14%	13%	11%
Shopko	25%	22%	10%	8%	19%	16%	9%	8%
Michael's	18%	15%	4%	3%	16%	14%	1%	1%
Robert's Crafts	18%	17%	5%	4%	15%	14%	2%	2%
Sears	17%	13%	13%	9%	5%	4%	5%	4%
Western Garden Center	11%	10%	4%	3%	0.3%	0.2%	10%	9%
Sutherland's	11%	9%	10%	8%	3%	2%	4%	3%
Anderson Lumber	7%	4%	6%	4%	1%	1%	1%	1%
Mitchell's	5%	4%	1%	0.4%	2%	2%	3%	2%
Wasatch Shadows	3%	3%	1%	1%	1%	0.2%	3%	2%
Butterfield Lumber	2%	1%	2%	1%	0.4%	0.4%	0%	0%
Economy Builders	1%	1%	1%	1%	0.1%	0.1%	0.1%	0.1%
Other	8%	8%	3%	3%	3%	3%	5%	5%

**How to read:** Sixty-nine percent of adults in the Salt Lake Primary Market Area have shopped at Home Depot in the last 12 months with 66 percent making a purchase. Thirty percent of adults shopped for home decorating supplies at Home Depot in the past 12 months with 27 percent making a purchase.



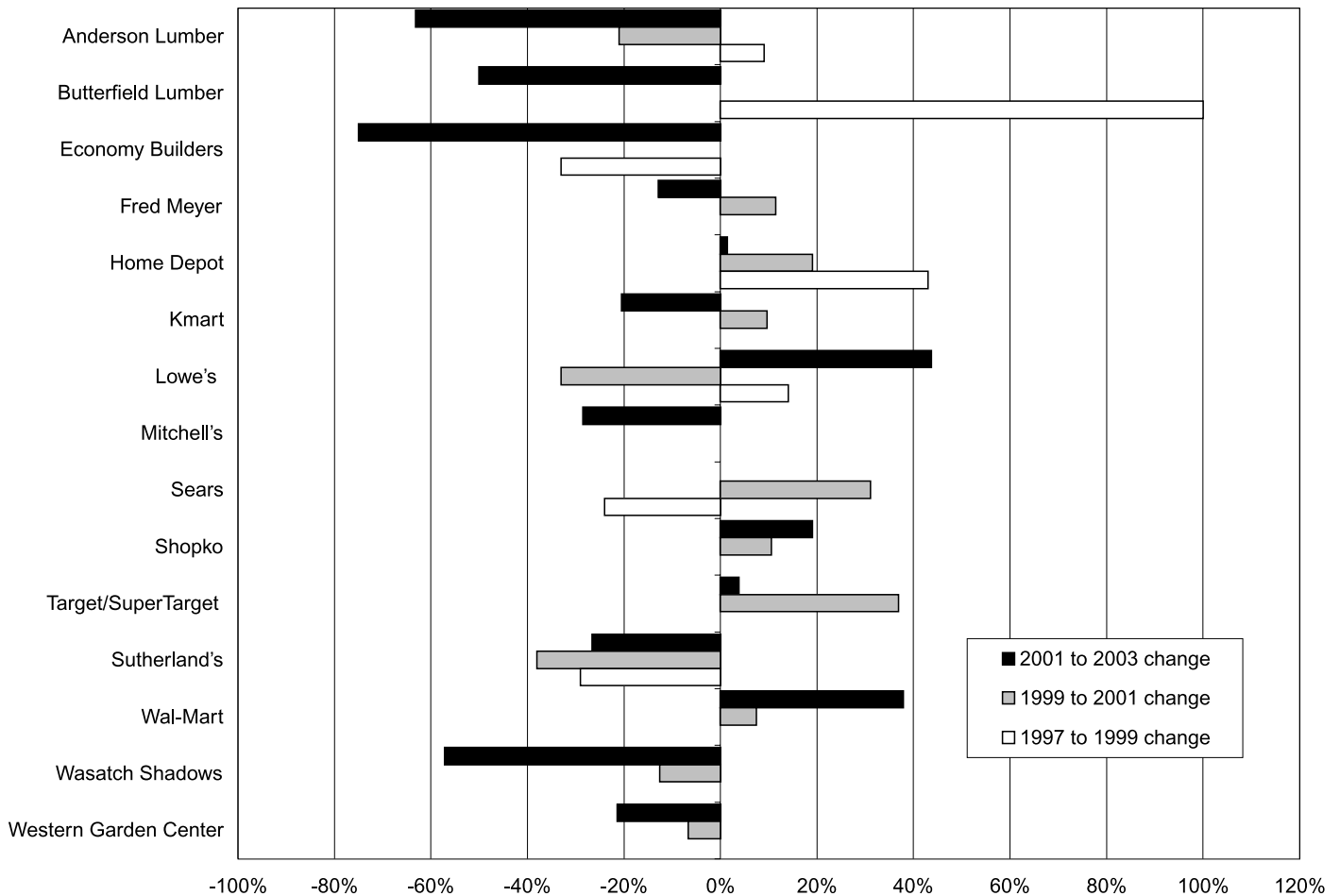
Source: Belden Continuing Market Study, 2003.

# HOME AND GARDEN STORE MARKET SHARE TRENDS

	1997 12-month shopping	1999 12-month shopping	1997 to 1999 change	2001 12-month shopping	1999 to 2001 change	2003 12-month shopping	2001 to 2003 change
Anderson Lumber	22%	24%	9%	19%	-21%	7%	-63%
Butterfield Lumber	2%	4%	100%	4%	0%	2%	-50%
Economy Builders	6%	4%	-33%	4%	0%	1%	-75%
Fred Meyer	NA	35%	NA	39%	11%	34%	-13%
Home Depot	40%	57%	43%	68%	19%	69%	1%
Kmart	NA	31%	NA	34%	10%	27%	-21%
Lowe's	42%	48%	14%	32%	-33%	46%	44%
Mitchell's	NA	7%	NA	7%	0%	5%	-29%
Sears	17%	13%	-24%	17%	31%	17%	0%
Shopko	NA	19%	NA	21%	11%	25%	19%
Target/SuperTarget	NA	19%	NA	26%	37%	27%	4%
Sutherland's	34%	24%	-29%	15%	-38%	11%	-27%
Wal-Mart	NA	27%	NA	29%	7%	40%	38%
Wasatch Shadows	NA	8%	NA	7%	-13%	3%	-57%
Western Garden Center	NA	15%	NA	14%	-7%	11%	-21%

**How to read:** Twenty-two percent of adults shopped at Anderson Lumber in 1997; 24 percent in 1999. This represents a 9 percent increase from 1997 to 1999. Nineteen percent of adults shopped at Anderson Lumber in 2001, representing a 21 percent decrease from 1999. Seven percent of adults shopped at Anderson Lumber in 2003, representing a 63 percent decrease from 2001.

**Note:** Only those stores included in the past two consumer surveys are shown.



Source: Belden Continuing Market Study, 2003.

# HOME AND GARDEN STORE CROSS-SHOPPING PATTERNS

For adults who shopped for any items during the past 12 months.

	Anderson Lumber	Butterfield Lumber	Economy Builders	Fred Meyer	Home Depot	Kmart
Anderson Lumber		8%	5%	51%	84%	43%
Butterfield Lumber	34%		0%	39%	83%	23%
Economy Builders	49%	0%		51%	84%	84%
Fred Meyer	10%	2%	1%		76%	41%
Home Depot	9%	2%	1%	38%		31%
Kmart	11%	2%	2%	53%	79%	
Lowe's	10%	3%	1%	42%	81%	34%
Michael's	6%	1%	1%	50%	81%	46%
Mitchell's	14%	4%	0%	50%	91%	52%
Robert's Crafts	9%	2%	0%	45%	81%	45%
Sears	17%	0%	3%	52%	82%	48%
Shopko	10%	2%	1%	57%	78%	55%
Target/SuperTarget	9%	2%	1%	45%	85%	36%
Sutherland's	13%	6%	0%	41%	80%	41%
Wal-Mart	9%	2%	0%	41%	79%	45%
Wasatch Shadows	28%	0%	0%	45%	88%	26%
Western Garden Center	11%	4%	0%	65%	78%	30%

	Lowe's	Michael's	Mitchell's	Robert's Crafts	Sears	Shopko
Anderson Lumber	64%	17%	9%	24%	40%	37%
Butterfield Lumber	76%	11%	11%	21%	0%	27%
Economy Builders	67%	35%	0%	0%	84%	49%
Fred Meyer	56%	26%	7%	24%	26%	42%
Home Depot	54%	21%	6%	21%	20%	29%
Kmart	58%	31%	9%	30%	30%	52%
Lowe's		23%	5%	27%	26%	33%
Michael's	59%		6%	45%	27%	51%
Mitchell's	55%	24%		24%	25%	24%
Robert's Crafts	71%	46%	6%		23%	57%
Sears	71%	29%	7%	25%		48%
Shopko	59%	36%	4%	40%	32%	
Target/SuperTarget	51%	36%	4%	36%	20%	43%
Sutherland's	48%	19%	13%	18%	25%	35%
Wal-Mart	62%	28%	4%	33%	24%	44%
Wasatch Shadows	74%	26%	12%	24%	23%	14%
Western Garden Center	63%	33%	13%	25%	28%	36%

	Target/SuperTarget	Sutherland's	Wal-Mart	Wasatch Shadows	Western Garden Center
Anderson Lumber	34%	20%	52%	13%	18%
Butterfield Lumber	36%	34%	47%	0%	30%
Economy Builders	18%	0%	18%	0%	0%
Fred Meyer	37%	13%	48%	4%	22%
Home Depot	34%	12%	46%	4%	13%
Kmart	37%	16%	67%	3%	13%
Lowe's	31%	11%	55%	5%	16%
Michael's	54%	11%	63%	5%	21%
Mitchell's	24%	31%	37%	9%	33%
Robert's Crafts	55%	11%	76%	4%	16%
Sears	33%	16%	58%	4%	19%
Shopko	47%	15%	70%	2%	16%
Target/SuperTarget		8%	60%	6%	13%
Sutherland's	20%		46%	2%	21%
Wal-Mart	41%	12%		2%	12%
Wasatch Shadows	48%	6%	20%		54%
Western Garden Center	32%	19%	44%	15%	

**How to read:** Of the adults who have shopped at Lowe's in the past 12 months, 10 percent have also shopped at Anderson Lumber.

# HOME & GARDEN STORE DEMOGRAPHIC PROFILES

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

	Market	Anderson Lumber	Fred Meyer	Home Depot	Kmart	Lowe's	Michael's	Mitchell's
<b>Market Share</b>								
Percent of Adults	100%	7%	34%	69%	27%	46%	18%	5%
Number of Adults	714,000	49,980	242,760	492,660	192,780	328,440	128,520	35,700
<b>Gender</b>								
Male	50%	61%	43%	51%	42%	53%	32%	52%
Female	50%	39%	57%	49%	58%	47%	68%	48%
<b>Age</b>								
18 - 24	19%	9%	11%	12%	16%	12%	16%	3%
25 - 34	22%	20%	20%	22%	18%	27%	28%	9%
35 - 44	21%	29%	20%	25%	22%	23%	21%	24%
45 - 54	17%	17%	25%	20%	24%	19%	22%	22%
55 - 64	9%	14%	10%	10%	8%	11%	8%	15%
65+	12%	12%	13%	10%	12%	9%	5%	26%
<b>Home Ownership</b>								
Own	77%	80%	84%	83%	80%	83%	74%	87%
Rent	23%	20%	16%	17%	20%	17%	26%	13%
<b>Marital Status</b>								
Married	66%	77%	67%	78%	63%	73%	67%	82%
Single	20%	17%	18%	11%	21%	14%	21%	8%
Divorced	10%	7%	11%	9%	11%	10%	10%	6%
Widowed	4%	0%	4%	3%	5%	3%	2%	4%
<b>Education Level</b>								
Bachelor's Degree or Higher	33%	48%	41%	36%	28%	33%	33%	47%
Some College/Tech Training	38%	32%	35%	40%	42%	42%	43%	40%
High School Grad or Less	29%	20%	25%	24%	31%	25%	24%	13%
<b>Occupation</b>								
Executive, Professional, Technical	32%	36%	34%	36%	29%	33%	33%	37%
Sales, Clerical	22%	17%	22%	22%	22%	23%	25%	23%
Blue Collar	22%	26%	18%	21%	26%	23%	20%	8%
Retired	11%	13%	11%	9%	11%	9%	8%	22%
Homemaker	8%	4%	11%	8%	8%	8%	10%	9%
Not Employed	3%	4%	2%	2%	3%	4%	2%	1%
<b>Household Income</b>								
Below \$25,000	13%	9%	11%	8%	9%	12%	9%	3%
\$25,000 - \$34,999	17%	9%	15%	14%	21%	16%	9%	9%
\$35,000 - \$49,999	17%	12%	18%	16%	23%	16%	28%	20%
\$50,000 - \$74,999	24%	35%	25%	29%	23%	28%	31%	39%
\$75,000 - \$99,999	17%	19%	16%	18%	14%	16%	14%	14%
\$100,000 or More	13%	16%	15%	14%	10%	13%	9%	16%
<b>Readership</b>								
Daily	49%	60%	53%	50%	55%	51%	53%	75%
Sunday	53%	56%	56%	55%	55%	56%	60%	78%

**Note:** Some stores were not profiled due to small sample sizes.

# HOME & GARDEN STORE DEMOGRAPHIC PROFILE CONTINUED

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

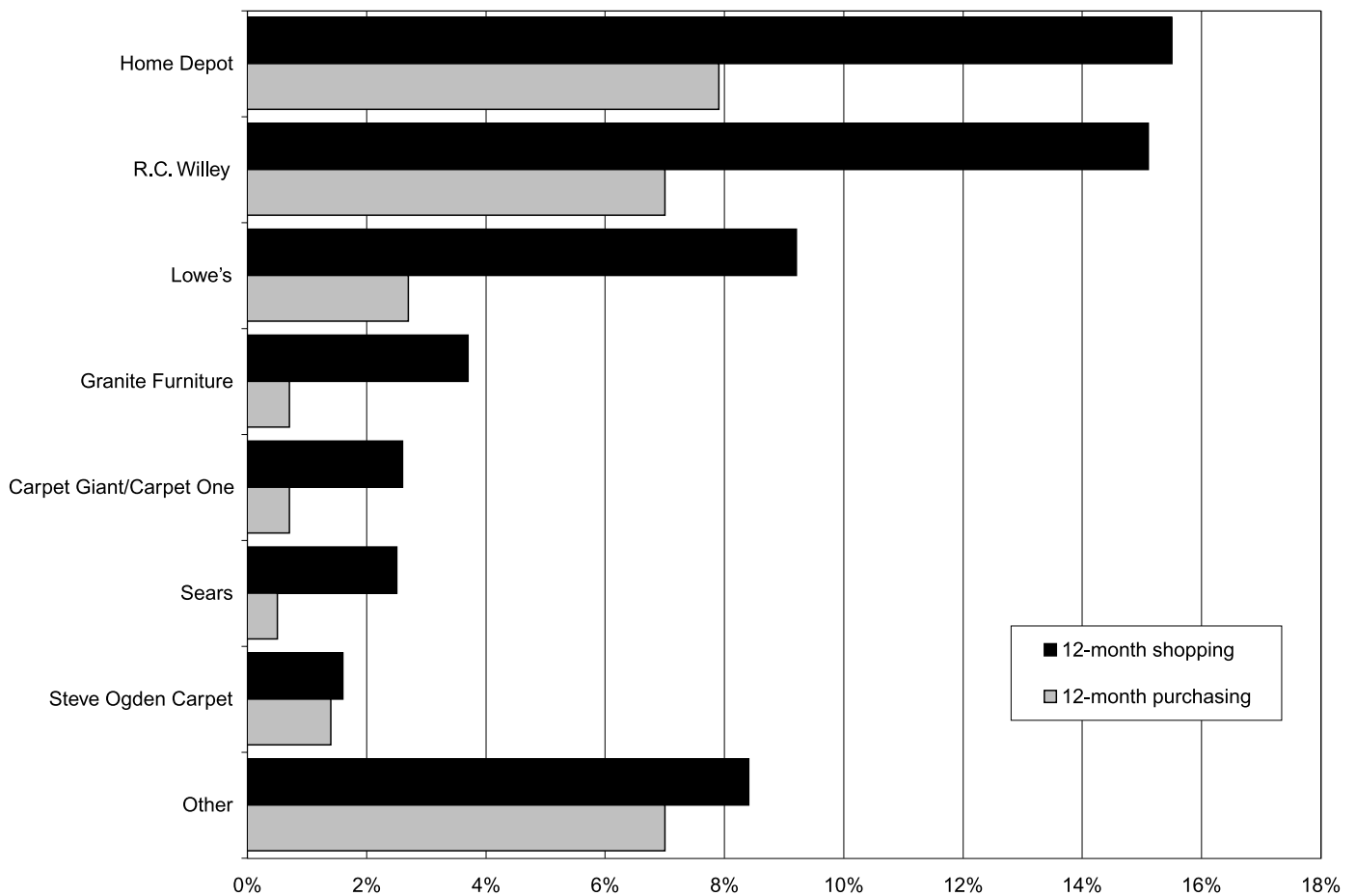
	Market	Robert's Crafts	Sears	Shopko	Target/ SuperTarget	Sutherland's	Wal-Mart	Western Garden Center
<b>Market Share</b>								
Percent of Adults	100%	18%	17%	25%	27%	11%	40%	11%
Number of Adults	714,000	128,520	121,380	178,500	192,780	78,540	285,600	78,540
<b>Gender</b>								
Male	50%	32%	61%	34%	37%	62%	43%	47%
Female	50%	68%	39%	66%	63%	38%	57%	53%
<b>Age</b>								
18 - 24	19%	18%	9%	16%	22%	9%	15%	2%
25 - 34	22%	27%	30%	22%	27%	17%	24%	19%
35 - 44	21%	22%	22%	27%	22%	26%	24%	26%
45 - 54	17%	20%	17%	20%	21%	21%	21%	21%
55 - 64	9%	8%	8%	7%	2%	9%	7%	17%
65+	12%	5%	14%	7%	6%	19%	10%	15%
<b>Home Ownership</b>								
Own	77%	80%	82%	84%	74%	94%	76%	91%
Rent	23%	20%	18%	16%	26%	6%	24%	9%
<b>Marital Status</b>								
Married	66%	74%	71%	66%	75%	70%	74%	68%
Single	20%	18%	15%	19%	16%	13%	13%	13%
Divorced	10%	6%	11%	12%	7%	16%	10%	13%
Widowed	4%	2%	3%	3%	2%	1%	3%	7%
<b>Education Level</b>								
Bachelor's Degree or Higher	33%	27%	36%	29%	37%	34%	29%	46%
Some College/Tech Training	38%	48%	41%	41%	41%	34%	40%	36%
High School Grad or Less	29%	25%	23%	30%	23%	32%	30%	18%
<b>Occupation</b>								
Executive, Professional, Technical	32%	31%	33%	29%	34%	33%	30%	37%
Sales, Clerical	22%	27%	23%	26%	28%	22%	24%	25%
Blue Collar	22%	21%	22%	22%	20%	18%	23%	16%
Retired	11%	5%	13%	8%	7%	13%	10%	18%
Homemaker	8%	13%	7%	12%	9%	8%	9%	3%
Not Employed	3%	2%	2%	3%	1%	3%	3%	1%
<b>Household Income</b>								
Below \$25,000	13%	9%	6%	9%	10%	8%	12%	10%
\$25,000 - \$34,999	17%	15%	14%	17%	18%	19%	18%	8%
\$35,000 - \$49,999	17%	24%	28%	20%	16%	15%	19%	16%
\$50,000 - \$74,999	24%	27%	28%	26%	27%	27%	27%	23%
\$75,000 - \$99,999	17%	14%	14%	18%	14%	18%	16%	24%
\$100,000 or More	13%	11%	10%	10%	15%	13%	9%	19%
<b>Readership</b>								
Daily	49%	51%	52%	51%	48%	51%	50%	65%
Sunday	53%	53%	57%	55%	53%	54%	52%	73%

**Note:** Some stores were not profiled due to small sample sizes.

# CARPET AND FLOOR COVERING STORE MARKET SHARE

	12-month shopping	12-month purchasing	Percentage of shoppers purchasing
Home Depot	16%	8%	50%
R.C. Willey	15%	7%	47%
Lowe's	9%	3%	33%
Granite Furniture	4%	1%	25%
Carpet Giant/Carpet One	3%	1%	33%
Sears	3%	1%	33%
Steve Ogden Carpet	2%	1%	50%
Other	8%	7%	88%

**How to read:** Fifteen percent of adults in the Salt Lake primary market area have shopped for carpet or other flooring at R.C. Willey in the past 12 months; 7 percent have made a purchase. This indicates 47 percent of shoppers made a purchase



Source: Belden Continuing Market Study, 2003.

# CARPET AND FLOOR COVERING STORE DEMOGRAPHIC PROFILES

For adults who shopped for carpet or floor covering in the past 12 months.

	Market	Carpet Giant/ Carpet One	Granite Furniture	Home Depot	Lowe's	R.C. Willey	Sears
<b>Market Share</b>							
Percent of Adults	100%	3%	4%	16%	9%	15%	3%
Number of Adults	714,000	21,420	28,560	114,240	64,260	107,100	21,420
<b>Gender</b>							
Male	50%	54%	42%	50%	44%	46%	50%
Female	50%	46%	58%	50%	56%	54%	50%
<b>Age</b>							
18 - 24	19%	19%	6%	5%	7%	13%	26%
25 - 34	22%	22%	16%	27%	32%	21%	19%
35 - 44	21%	4%	8%	25%	21%	22%	13%
45 - 54	17%	42%	23%	24%	25%	27%	29%
55 - 64	9%	13%	17%	7%	6%	9%	8%
65+	12%	0%	31%	13%	9%	8%	4%
<b>Home Ownership</b>							
Own	77%	94%	89%	92%	92%	90%	98%
Rent	23%	6%	11%	8%	8%	10%	2%
<b>Marital Status</b>							
Married	66%	80%	75%	82%	84%	71%	20%
Single	20%	1%	15%	6%	2%	15%	46%
Divorced	10%	19%	1%	8%	12%	13%	28%
Widowed	4%	0%	9%	4%	2%	1%	6%
<b>Education Level</b>							
Bachelor's Degree or Higher	33%	56%	44%	40%	33%	33%	30%
Some College/Tech Training	38%	26%	25%	38%	50%	42%	35%
High School Grad or Less	29%	18%	31%	22%	17%	25%	35%
<b>Occupation</b>							
Executive, Professional, Technical	32%	52%	39%	34%	41%	42%	47%
Sales, Clerical	22%	19%	18%	24%	21%	18%	21%
Blue Collar	22%	17%	11%	22%	19%	22%	26%
Retired	11%	0%	24%	10%	7%	7%	3%
Homemaker	8%	13%	5%	7%	10%	9%	3%
Not Employed	3%	0%	3%	2%	3%	0%	0%
<b>Household Income</b>							
Below \$25,000	13%	0%	3%	6%	7%	3%	0%
\$25,000 - \$34,999	17%	5%	9%	9%	9%	17%	36%
\$35,000 - \$49,999	17%	2%	26%	14%	8%	15%	30%
\$50,000 - \$74,999	24%	53%	6%	32%	40%	27%	8%
\$75,000 - \$99,999	17%	23%	33%	23%	20%	26%	3%
\$100,000 or More	13%	17%	23%	16%	16%	13%	23%
<b>Readership</b>							
Daily	49%	51%	63%	53%	53%	50%	32%
Sunday	53%	54%	69%	57%	55%	59%	43%

**Note:** Some stores were not profiled due to small sample sizes.

## CARPET AND FLOOR COVERING CROSS-SHOPPING PATTERNS

For adults who shopped for carpet or floor covering in the past 12 months.

	Carpet Giant/ Carpet One	Granite Furniture	Home Depot	Lowe's	R.C. Willey	Sears	Steve Ogden Carpet
Carpet Giant/Carpet One		16%	76%	50%	64%	14%	29%
Granite Furniture	11%		38%	18%	46%	19%	3%
Home Depot	13%	9%		47%	42%	6%	4%
Lowe's	14%	7%	80%		44%	9%	8%
R.C. Willey	11%	11%	43%	27%		16%	11%
Sears	14%	28%	39%	31%	92%		42%
Steve Ogden Carpet	47%	8%	41%	44%	100%	66%	

**How to read:** Of the adults who have shopped at Sears in the past 12 months, 14 percent have also shopped at Carpet Giant/Carpet One.

## HOME AND GARDEN SERVICES USED

Number and percentage of adults who have used the following services in the past 12 months.

	Number of Adults	Percentage of Adults
Heating, ventilation or air conditioning	271,320	38%
Landscaping or lawn care	185,640	26%
Plumber	149,940	21%
Electrician	85,680	12%
Garage door installers	64,260	9%

## HOME IMPROVEMENT PURCHASE INTENTIONS

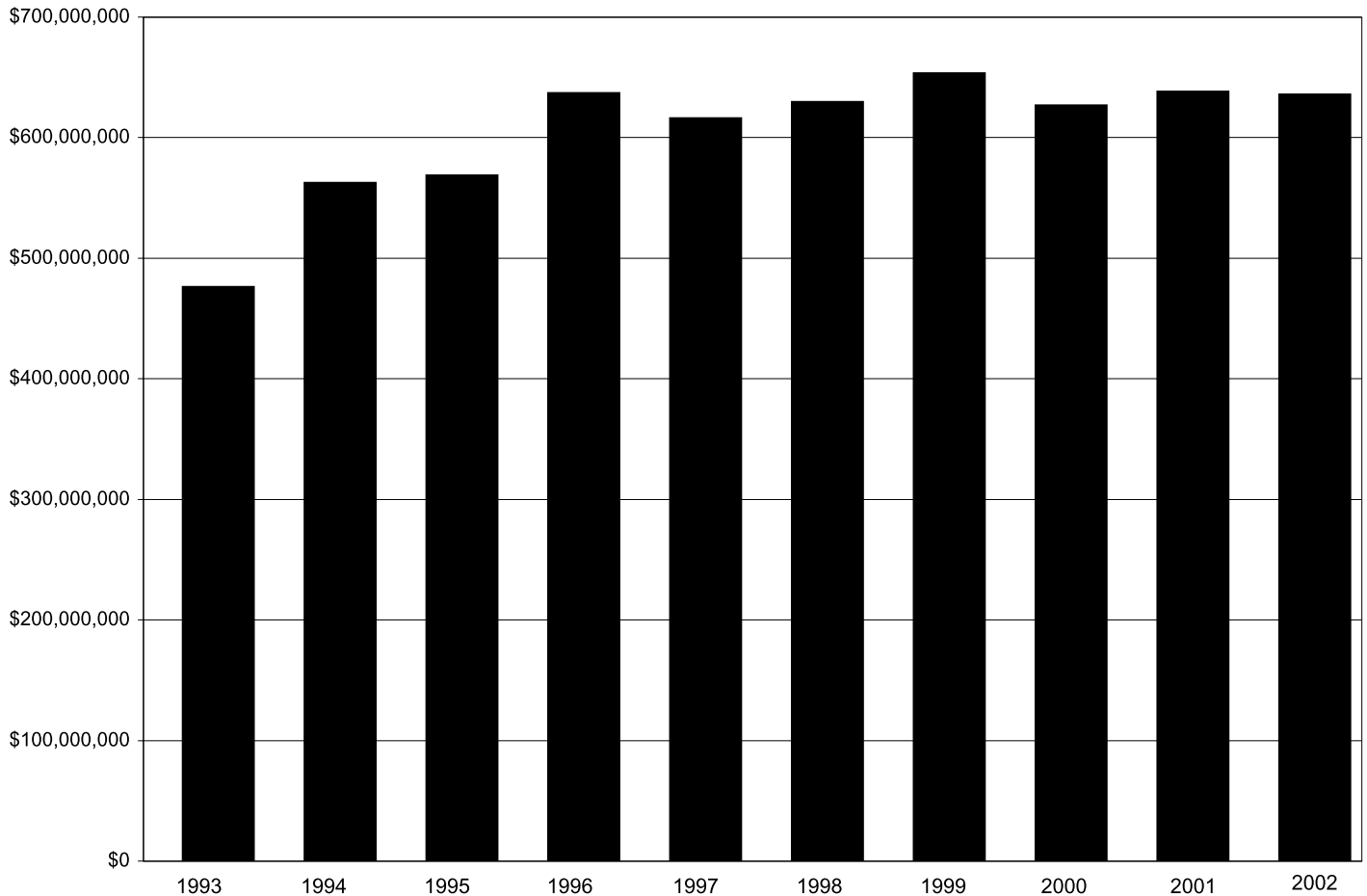
Number and percentage of adults who plan to purchase the following in the next 12 months.

	Number of Adults	Percentage of Adults
Make home improvements costing \$200 or more	342,720	48%
Make landscaping or garden improvements costing \$200 or more	264,180	37%
Wallpaper, paint or other wall coverings	207,060	29%
Draperies, blinds or other window coverings	157,080	22%
Carpeting, linoleum, tiles or wood flooring	149,940	21%
Central air conditioning	35,700	5%
Gas fireplace	21,420	3%
Furnace	21,420	3%
Spa or hot tub	21,420	3%
Water heater	14,280	2%
Home security system	14,280	2%
Swamp cooler	7,140	1%

Source: Belden Continuing Market Study, 2003.

# BUILDING AND GARDENING PURCHASES IN SALT LAKE COUNTY

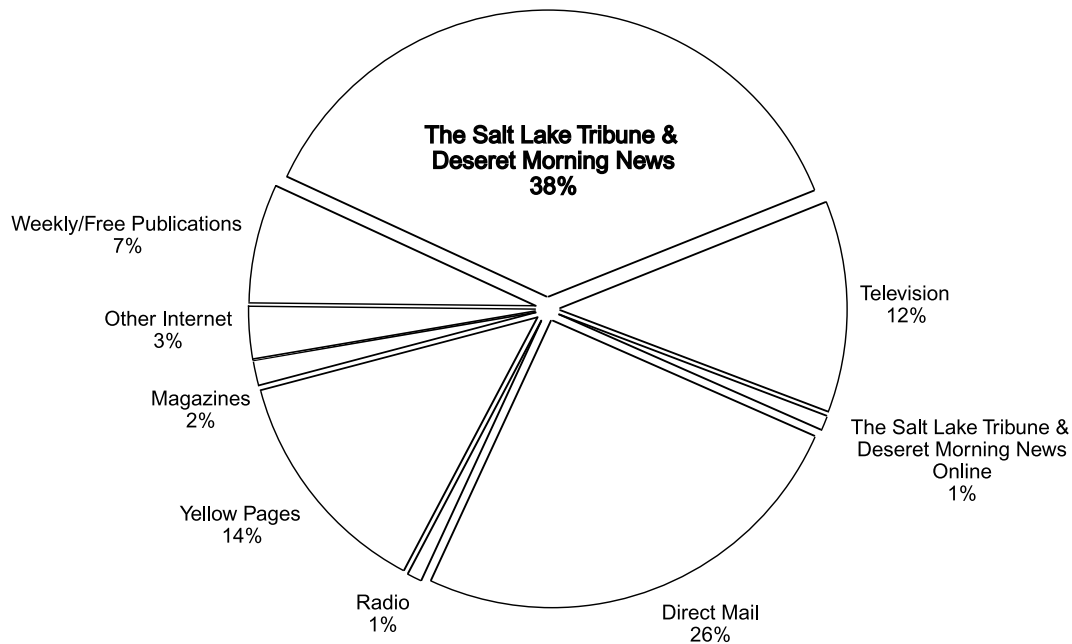
Year	Sales
1993	\$476,075,500
1994	\$562,676,955
1995	\$568,669,518
1996	\$637,022,704
1997	\$616,236,787
1998	\$629,773,724
1999	\$653,466,866
2000	\$626,835,677
2001	\$638,421,764
2002	\$635,776,882



Source: Utah State Tax Commission, [www.tax.utah.gov](http://www.tax.utah.gov)

## PREFERRED ADVERTISING SOURCE FOR HOME IMPROVEMENT SUPPLIES

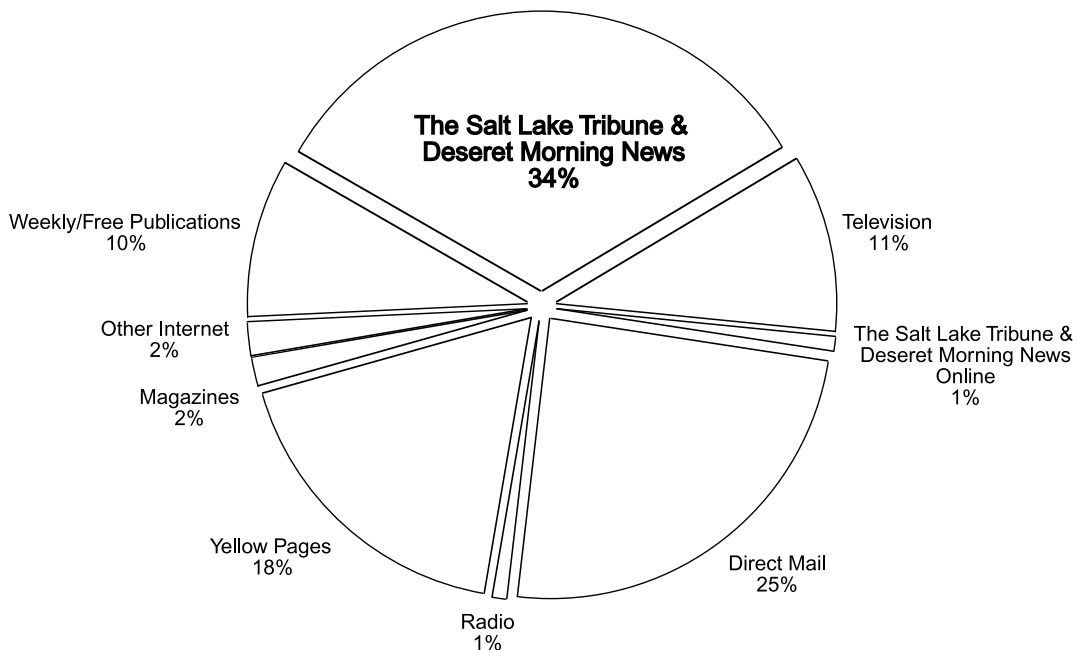
For adults who would use an advertising source.



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

## PREFERRED ADVERTISING SOURCE FOR LANDSCAPING OR GARDEN SUPPLIES

For adults who would use an advertising source.



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

Source: Belden Continuing Market Study, 2003.



# NEWSPAPER AGENCY CORPORATION

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