

Category Update: Boy's Clothing

Retail Forward Category Update: Boy's Clothing Q2 '04 Survey Results

Category Update: Boy's Clothing

Table of Contents

Retailers Where Consumers Spent The Most on Boy's Clothing in Past Month	3
Average Amount Spent on Boy's Clothing at Key Retailers	5
Reasons Boy's Clothing Was Purchased at Discount Stores/Supercenters for Q2 '04	6
Demographics for Shoppers Who Purchased Boy's Clothing in the Past 4 Weeks	7
Percent of Monthly Shoppers at Key Retailers Spending the Most on Boy's Clothing at This Retailer	9
Appendix	10

Category Update: Boy's Clothing

Figure 1
Retailers Where Consumers Spent The Most on Boy's Clothing in Past Month



Retailer	Q4 '03 (partial)	Q1 '04	Q2 '04	Q3 '04	Q4 '04	Q1 '05
Discount Stores/Supercenters	44.1%	47.4%	44.5%			
Kmart/Big Kmart	3.1%	2.8%	3.9%			
Meijer	ns	ns	1.9%			
SuperTarget	1.7%	ns	2.1%			
Target/Target Greatland	8.6%	11.8%	8.4%			
Wal-Mart	14.1%	11.9%	14.7%			
Wal-Mart Supercenter	14.7%	17.8%	13.1%			
<i>(Net for Target/Target Greatland/SuperTarget)</i>	<i>10.3%</i>	<i>12.4%</i>	<i>10.5%</i>			
<i>(Net for Wal-Mart/Wal-Mart Supercenter)</i>	<i>28.8%</i>	<i>29.7%</i>	<i>27.8%</i>			
Department Stores	16.7%	13.6%	19.9%			
JCPenney	5.3%	2.9%	4.8%			
Kohl's	4.5%	4.3%	7.2%			
Sears	3.2%	ns	3.2%			
<i>(Net for Federated Dept. Stores)</i>	<i>1.5%</i>	<i>ns</i>	<i>1.7%</i>			
<i>(Net for May Dept. Stores)</i>	<i>4.4%</i>	<i>2.9%</i>	<i>4.1%</i>			
Apparel Specialty Stores	22.5%	22.7%	16.7%			
Old Navy	7.2%	7.7%	4.3%			
TJMaxx or Marshall's	ns	3.1%	ns			
<i>(Net for Gap, Inc.)</i>	<i>7.5%</i>	<i>8.5%</i>	<i>4.5%</i>			
<i>(Net for Children's spec. clothing)</i>	<i>9.4%</i>	<i>7.3%</i>	<i>9.2%</i>			
GapKids or babyGap	3.4%	ns	3.0%			
Kids R Us/Babies R Us	3.0%	ns	1.5%			
The Children's Place	1.8%	2.9%	2.8%			
Outlet Stores	2.1%	ns	ns			
Factory outlet apparel store	1.7%	ns	ns			

(Continued on next page)
(NS indicates insufficient sample.)

Read As: '3.9% of Boy's Clothing purchasers in Q2 '04 reported spending the most money on this category at Kmart/Big Kmart.'

Source: Retail Forward ShopperScape™ (07-13-2004)

Category Update: Boy's Clothing

Figure 1 (continued)
Retailers Where Consumers Spent The Most on Boy's Clothing in Past Month



Retailer	Q4 '03 (partial)	Q1 '04	Q2 '04	Q3 '04	Q4 '04	Q1 '05
Other Specialty Retailers	11.3%	14.2%	14.9%			
Some other retailer	10.1%	11.8%	13.8%			

(Continued on next page)

Source: Retail Forward ShopperScape™ (07-13-2004)

Category Update: Boy's Clothing

Figure 2
Average Amount Spent on Boy's Clothing at Key Retailers



Retailer	Q4 '03 (partial)	Q1 '04	Q2 '04	Q3 '04	Q4 '04	Q1 '05
Discount Stores/Supercenters	\$56	\$64	\$50			
Target/Target Greatland	\$44	\$64	\$38			
Wal-Mart	\$46	\$71	\$59			
Wal-Mart Supercenter	\$66	\$65	\$41			
<i>(Net for Target/Target Greatland/SuperTarget)</i>	<i>\$56</i>	<i>\$62</i>	<i>\$51</i>			
<i>(Net for Wal-Mart/Wal-Mart Supercenter)</i>	<i>\$56</i>	<i>\$67</i>	<i>\$50</i>			
Department Stores	\$73	\$71	\$70			
JCPenney	\$74	ns	ns			
Kohl's	ns	ns	\$53			
Apparel Specialty Stores	\$97	\$88	\$55			
Old Navy	\$77	ns	ns			
<i>(Net for Gap, Inc.)</i>	<i>\$86</i>	<i>ns</i>	<i>ns</i>			
<i>(Net for Children's spec. clothing)</i>	<i>\$85</i>	<i>ns</i>	<i>\$57</i>			
Other Specialty Retailers	\$55	\$76	\$60			
Some other retailer	\$53	\$83	\$62			

(NS indicates insufficient sample.)

Read As: 'Boy's Clothing purchasers at Target/Target Greatland reported spending an average of \$38 on this category at Target/Target Greatland.'

Source: Retail Forward ShopperScape™ (07-13-2004)

Category Update: Boy's Clothing

Figure 3
Reasons Boy's Clothing Was Purchased at Discount Stores/Supercenters for Q2 '04



Reason	All	Discount Stores/Supercenters
Had gift card/gift certificate redeemable at this retailer	1.9%	ns
Employee discount/someone in household works there	1.7%	ns
More styles, colors, materials, or product features I like	4.7%	3.4%
More selection of styles, colors, materials, or product features	3.8%	ns
More selection of brands	2.5%	ns
Store credit card	2.7%	ns
Convenience to home/work	3.9%	6.7%
Convenience to other stores I shop	2.8%	3.3%
Sizes I needed	2.4%	ns
Higher quality products	3.0%	ns
Better prices for the quality	14.8%	16.9%
Better prices for the brands	10.6%	13.1%
Item on sale/better sale prices	16.1%	15.9%
Better able to one-stop shop for many categories	7.4%	13.7%
Other SPECIFY	6.5%	7.4%
No real reason -- bought on impulse	9.0%	7.9%

(NS indicates insufficient sample.)

Read As: "

Source: Retail Forward ShopperScape™ (07-13-2004)

Category Update: Boy's Clothing

Figure 4
Demographics for Shoppers Who Purchased Boy's Clothing in the Past 4 Weeks



	All	Q4 '03 (partial)	Q1 '04	Q2 '04	Q3 '04	Q4 '04	Q1 '05
Age							
18-24	4.2%	3.4%	3.6%	5.5%			
25-34	28.9%	30.4%	24.6%	29.8%			
35-44	32.3%	29.8%	37.4%	32.1%			
45-54	13.8%	15.6%	11.4%	13.2%			
55-64	10.7%	11.6%	11.9%	9.2%			
65+	10.0%	9.2%	11.2%	10.2%			
Mean	44	45	45	43			
Median	40	42	40	40			
Income							
under \$25,000	24.8%	26.7%	26.9%	21.5%			
\$25,000-\$49,999	28.2%	29.2%	26.5%	28.1%			
\$50,000-\$74,999	20.8%	19.1%	17.5%	24.4%			
\$75,000-\$99,999	12.1%	13.3%	13.4%	10.2%			
\$100,000+	14.1%	11.7%	15.7%	15.8%			
Mean	56,462	52,309	61,831	57,884			
Median	47,500	47,500	55,000	47,500			
Market Size							
Under 500,000	31.9%	33.9%	32.3%	29.6%			
500,000 - 1,999,999	21.2%	21.5%	22.5%	20.3%			
2,000,000 and over	46.9%	44.6%	45.1%	50.2%			
Geographic Region							
New England	5.4%	5.2%	4.8%	6.0%			
Middle Atlantic	14.5%	13.7%	13.8%	15.7%			
East North Central	16.6%	15.7%	16.1%	17.9%			
West North Central	6.9%	6.5%	5.8%	8.0%			

(Continued on next page)

Read As: '3.4% of Boy's Clothing purchasers in Q2 '04 fell in the 18-24 Age group.'

Source: Retail Forward ShopperScape™ (07-13-2004)



Category Update: Boy's Clothing

Figure 4 (continued)
Demographics for Shoppers Who Purchased Boy's Clothing in the Past 4 Weeks



	All	Q4 '03 (partial)	Q1 '04	Q2 '04	Q3 '04	Q4 '04	Q1 '05
South Atlantic	19.3%	19.8%	19.7%	18.6%			
East South Central	6.1%	5.8%	5.7%	6.5%			
West South Central	10.6%	10.4%	12.2%	10.0%			
Mountain	7.2%	9.4%	6.7%	5.2%			
Pacific	13.3%	13.4%	15.1%	12.1%			
Household Size							
1 Members	13.2%	17.3%	10.2%	10.6%			
2 Members	21.0%	23.1%	19.2%	19.8%			
3 Members	20.4%	20.5%	16.6%	22.4%			
4 Members	27.3%	23.7%	33.7%	27.4%			
5 or More Members	18.1%	15.3%	20.3%	19.7%			
Life Stage							
Young Singles (under 45)	2.2%	4.3%	ns	ns			
Middle singles (35-64)	9.0%	11.2%	7.0%	7.9%			
Older singles (65+)	1.9%	1.8%	ns	2.1%			
Young couple (under 45)	4.3%	3.0%	6.5%	4.3%			
Working older (45+) couple	6.8%	8.9%	3.4%	6.4%			
Retired older (45+) couple	7.1%	6.9%	7.6%	7.0%			
Young parent (under 45)	39.8%	40.4%	36.5%	40.9%			
Middle parent (under 45)	14.3%	9.7%	18.8%	16.6%			
Older parent (45+)	13.7%	12.9%	16.1%	13.3%			

(Continued on next page)

(NS indicates insufficient sample.)

Source: Retail Forward ShopperScope™ (07-13-2004)

Category Update: Boy's Clothing

Figure 5
Percent of Monthly Shoppers at Key Retailers Spending the Most on Boy's Clothing at This Retailer



Retailer	Q4 '03 (partial)	Q1 '04	Q2 '04	Q3 '04	Q4 '04	Q1 '05
Discount Stores/Supercenters	47.0%	49.2%	50.1%			
Target/Target Greatland	9.6%	9.9%	10.4%			
Wal-Mart	15.5%	15.4%	21.1%			
Wal-Mart Supercenter	19.4%	26.5%	16.5%			
<i>(Net for Target/Target Greatland/SuperTarget)</i>	11.2%	10.2%	12.5%			
<i>(Net for Wal-Mart/Wal-Mart Supercenter)</i>	22.4%	24.5%	24.2%			
<i>(Net for May Dept. Stores)</i>	5.9%	ns	6.0%			
<i>(Net for Gap, Inc.)</i>	18.5%	ns	ns			
<i>(Net for Children's spec. clothing)</i>	10.0%	9.3%	12.9%			

(NS indicates insufficient sample.)

Read As: '10.4% of monthly Target/Target Greatland shoppers who reported buying Boy's Clothing, spent the most on that category at Target/Target Greatland.'

Source: Retail Forward ShopperScape™ (07-13-2004)

Category Update: Boy's Clothing

What is the Retail Forward ShopperScape™?

The Retail Forward ShopperScape™ is a unique source of information about consumer shopping behavior today.

The Retail Forward ShopperScape™ has been fielded since November 2003 to a sample of 4,000 consumers each month. The survey gathers timely, up-to-date, information on over 250 individual retailers/retail sectors and over 100 product categories across all retail sectors. Topics addressed in the survey include shopping frequency, store preference for specific merchandise categories, factors influencing store choice, and a myriad of other issues.

- The Retail Forward ShopperScape™ survey is administered through TNS-NFO's online household panel. Data is weighted by key Census demographic characteristics to be representative of the total U.S. population.
- Survey respondents are the self-designated "primary shoppers" in their households (responsible for at least half of the household's shopping).
- Additional TNS-NFO panelist demographic data is merged with ShopperScape™ survey data.

Looking for Customized Data?

Retail Forward's staff of analysts also fulfills custom ShopperScape™ requests for clients on a project basis. Data can be provided in either a customized ShopperScape™ report, or Quant analysis, which allows data users to look at the data in even more ways. Call Kathy Clarke at 614-355-4009 or Sara Dunlap at 614-355-4022 for find out more about custom data requests.

Category Update: Boy's Clothing

Source: Retail Forward ShopperScape™

Execution Status:

Retail Forward ShopperScape Report Generator v2.25 - 1.06
07-13-2004 - 09:46:09

Nov'03	04/15/04	17:14:42
Dec'03	04/15/04	17:15:34
Jan'04	04/15/04	17:16:28
Feb'04	04/15/04	17:17:38
Mar'04	06/23/04	14:47:52
Apr'04	06/23/04	14:41:08
May'04	06/23/04	14:20:50
Jun'04	07/06/04	18:12:00
Jul'04	n/a	
Aug'04	n/a	
Sep'04	n/a	
Oct'04	n/a	
Nov'04	n/a	
Dec'04	n/a	
Jan'05	n/a	