

Retail Forward Channel Report:
Home Improvement/Hardware Stores
May '04 Survey Results

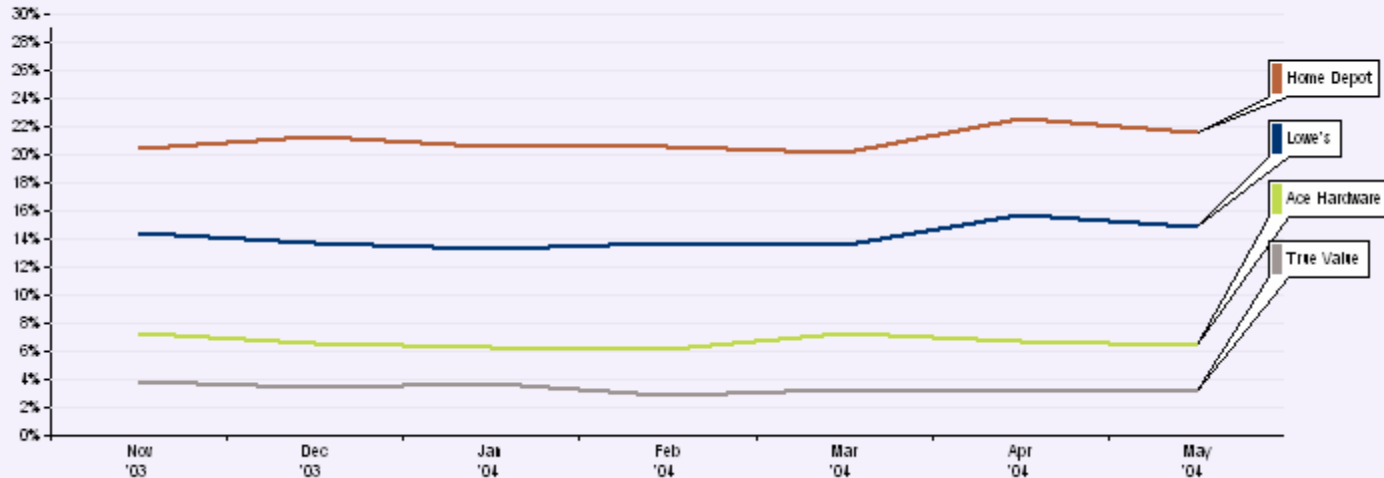
Channel Report: Home Improvement/Hardware Stores

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Channel Report: Home Improvement/Hardware Stores

Figure 1
Percent Shopping Monthly at Leading Home Improvement/Hardware Stores



Source: Retail Forward ShopperScope (tm) (09-28-2004)

Figure 2
Percent Shopping Monthly at All Home Improvement/Hardware Stores



Retailer	Nov '03	Dec '03	Jan '04	Feb '04	Mar '04	Apr '04	May '04
Franks Nursery	0.9%	1.0%	0.9%	1.0%	1.1%	0.8%	1.0%
Other lawn and garden store	5.7%	5.4%	5.1%	5.0%	6.6%	7.8%	8.0%
Ace Hardware	7.6%	6.8%	6.5%	6.3%	7.6%	6.9%	6.7%
Orchard	1.0%	0.6%	0.6%	0.6%	0.6%	0.7%	0.7%
Sears Hardware	3.9%	4.1%	4.1%	4.1%	4.0%	3.8%	3.8%
True Value	4.0%	3.6%	3.8%	2.9%	3.4%	3.3%	3.3%

Read As: '1.0% of shoppers surveyed in May '04 reported they visit Franks Nursery monthly.'

Source: Retail Forward ShopperScope™ (09-28-2004 CH1)

Channel Report: Home Improvement/Hardware Stores

Figure 2 (continued)
Percent Shopping Monthly at All Home Improvement/Hardware Stores

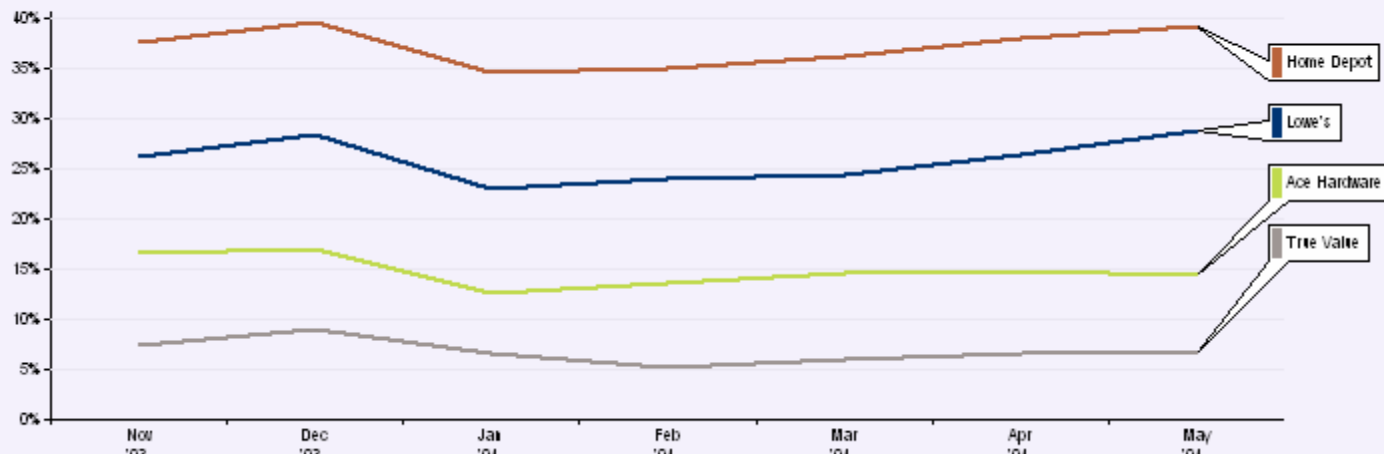


Retailer	Nov '03	Dec '03	Jan '04	Feb '04	Mar '04	Apr '04	May '04
Other hardware stores	7.1%	6.9%	7.4%	6.8%	8.0%	7.1%	7.7%
Other lumberyards	3.4%	3.0%	2.7%	3.1%	3.6%	3.0%	2.7%
Home Depot	21.2%	22.0%	21.3%	21.3%	20.8%	23.4%	22.3%
Lowe's	14.9%	14.2%	13.8%	14.2%	14.0%	16.3%	15.4%
Menard's	2.8%	2.7%	2.7%	2.9%	2.3%	2.6%	3.0%
Sherwin Williams	1.1%	0.8%	0.7%	0.9%	0.9%	1.1%	1.3%
Other specialty home improvement store	1.9%	1.5%	1.3%	1.3%	1.7%	1.4%	1.5%

Source: Retail Forward ShopperScape™ (09-28-2004 CH1)

Channel Report: Home Improvement/Hardware Stores

Figure 3
Percent Shopping at Leading Home Improvement/Hardware Stores in Past Month



Source: Retail Forward ShopperScape (tm) (09-28-2004)

Figure 4
Percent Shopping at All Home Improvement/Hardware Stores in Past Month



Retailer	Nov '03	Dec '03	Jan '04	Feb '04	Mar '04	Apr '04	May '04
Franks Nursery	1.9%	2.1%	1.5%	1.4%	1.6%	1.9%	2.5%
Other lawn and garden store	7.2%	8.1%	6.5%	5.9%	10.0%	13.5%	15.5%
Ace Hardware	16.4%	16.7%	12.4%	13.4%	14.3%	14.5%	14.2%
Orchard	1.5%	1.5%	1.0%	1.2%	1.1%	1.1%	1.2%
Sears Hardware	8.9%	13.5%	8.9%	7.5%	7.2%	6.9%	7.1%
True Value	7.2%	8.9%	6.6%	5.2%	6.0%	6.6%	6.5%
Other hardware stores	7.9%	8.7%	8.0%	7.4%	8.5%	7.7%	8.0%

Read As: '2.5% of shoppers surveyed in May '04 visited Franks Nursery in the previous 4 weeks.'

Source: Retail Forward ShopperScape™ (09-28-2004 CH2)

Channel Report: Home Improvement/Hardware Stores

Figure 4 (continued)
Percent Shopping at All Home Improvement/Hardware Stores in Past Month



Retailer	Nov '03	Dec '03	Jan '04	Feb '04	Mar '04	Apr '04	May '04
Other lumberyards	4.2%	4.7%	3.2%	3.4%	4.1%	4.0%	4.3%
Home Depot	37.0%	39.0%	34.1%	34.4%	35.6%	37.5%	38.7%
Lowe's	25.9%	28.0%	22.7%	23.7%	24.1%	26.1%	28.3%
Menard's	4.3%	5.3%	4.3%	4.3%	4.4%	4.8%	5.5%
Sherwin Williams	2.1%	1.7%	1.6%	1.6%	1.9%	1.6%	2.2%
Other specialty home improvement store	2.4%	2.4%	1.2%	1.5%	1.8%	1.9%	1.7%

Source: Retail Forward ShopperScape™ (09-28-2004 CH2)

Channel Report: Home Improvement/Hardware Stores

Figure 5
Demographic Profile of Monthly Shoppers at Home Improvement/Hardware Stores for May '04



	All	Channel Total	Other lawn and garden store	Ace Hardware	Sears Hardware	True Value
Age						
18-24	6.4%	4.8%	4.0%	7.0%	5.0%	5.7%
25-34	18.3%	15.6%	14.3%	12.9%	13.3%	13.9%
35-44	22.0%	21.8%	17.0%	15.1%	19.6%	16.6%
45-54	20.4%	21.9%	23.6%	17.5%	21.3%	25.6%
55-64	14.0%	14.9%	17.5%	17.9%	13.3%	18.7%
65+	18.9%	21.0%	23.6%	29.6%	27.4%	19.5%
Mean	48	51	ns	ns	ns	ns
Median	48	50	ns	ns	ns	ns
Income						
under \$25,000	29.3%	22.2%	22.3%	24.1%	19.9%	29.9%
\$25,000-\$49,999	27.3%	27.1%	29.5%	31.3%	25.3%	26.7%
\$50,000-\$74,999	18.2%	20.5%	16.0%	20.3%	24.7%	16.5%
\$75,000-\$99,999	11.0%	13.0%	14.4%	9.2%	10.7%	8.1%
\$100,000+	14.2%	17.2%	17.8%	15.0%	19.4%	18.8%
Mean	54,020	60,942	ns	ns	ns	ns
Median	42,500	55,000	ns	ns	ns	ns
Market Size						
Under 500,000	30.1%	30.0%	33.5%	33.3%	26.7%	44.6%
500,000 - 1,999,999	22.7%	22.4%	22.8%	23.7%	22.4%	17.4%
2,000,000 and over	47.2%	47.5%	43.7%	43.0%	50.9%	38.0%
Geographic Region						
New England	5.1%	5.0%	4.7%	5.9%	5.1%	8.8%
Middle Atlantic	14.1%	12.3%	12.1%	7.5%	16.3%	16.6%
East North Central	16.2%	15.6%	12.7%	19.8%	18.1%	15.3%
West North Central	7.0%	7.2%	7.9%	8.4%	6.4%	10.2%

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(NS indicates insufficient sample.)

Read As: '4.0% of monthly Other lawn and garden store shoppers in May '04 fell in the 18-24 Age group.'

Source: Retail Forward ShopperScape™ (09-28-2004 CH3)



Channel Report: Home Improvement/Hardware Stores

Figure 5 (continued)
Demographic Profile of Monthly Shoppers at Home Improvement/Hardware Stores for May '04



	All	Channel Total	Other lawn and garden store	Ace Hardware	Sears Hardware	True Value
South Atlantic	19.1%	20.3%	20.0%	22.5%	19.0%	11.3%
East South Central	6.2%	5.6%	9.1%	3.2%	4.4%	4.2%
West South Central	10.9%	10.8%	12.3%	8.8%	14.4%	4.3%
Mountain	6.5%	7.2%	5.7%	8.8%	5.1%	9.8%
Pacific	14.9%	16.0%	15.6%	15.0%	11.3%	19.5%
Household Size						
1 Members	26.5%	21.5%	18.8%	20.9%	15.0%	23.1%
2 Members	33.4%	37.2%	44.7%	42.8%	40.9%	38.6%
3 Members	16.0%	16.7%	15.0%	11.6%	18.3%	12.9%
4 Members	14.3%	14.8%	11.9%	13.6%	19.4%	13.2%
5 or More Members	9.8%	9.8%	9.6%	11.3%	6.4%	12.2%
Life Stage						
Young Singles (under 45)	5.2%	3.7%	2.1%	2.4%	5.5%	ns
Middle singles (35-64)	16.2%	13.4%	12.9%	13.3%	5.4%	14.3%
Older singles (65+)	5.1%	4.3%	3.8%	5.2%	4.1%	6.0%
Young couple (under 45)	9.2%	8.8%	9.5%	9.7%	7.9%	8.4%
Working older (45+) couple	10.5%	12.4%	14.0%	14.4%	11.0%	16.8%
Retired older (45+) couple	12.8%	15.7%	19.8%	19.9%	24.5%	14.1%
Young parent (under 45)	14.3%	14.1%	10.9%	7.3%	12.4%	11.9%
Middle parent (under 45)	10.3%	9.8%	7.9%	7.5%	9.0%	7.5%
Older parent (45+)	14.8%	15.9%	16.4%	17.9%	18.1%	17.5%
Roommates	1.6%	1.8%	2.7%	2.4%	ns	ns

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(NS indicates insufficient sample.)

Source: Retail Forward ShopperScope™ (09-28-2004 CH3)

Channel Report: Home Improvement/Hardware Stores

Figure 5 (continued)
Demographic Profile of Monthly Shoppers at Home Improvement/Hardware Stores for May '04



	Other hardware stores	Other lumberyards	Home Depot	Lowe's	Menard's
Age					
18-24	5.6%	5.8%	2.8%	3.3%	ns
25-34	16.1%	5.7%	16.3%	15.9%	10.8%
35-44	21.6%	27.1%	23.2%	20.5%	25.6%
45-54	22.1%	20.4%	22.8%	24.6%	24.8%
55-64	15.3%	23.1%	14.3%	14.8%	13.4%
65+	19.3%	17.8%	20.6%	20.8%	22.4%
Mean	ns	ns	50	49	ns
Median	ns	ns	49	47	ns
Income					
under \$25,000	29.4%	22.0%	18.1%	19.5%	15.3%
\$25,000-\$49,999	25.5%	26.6%	23.8%	27.5%	33.7%
\$50,000-\$74,999	19.7%	17.6%	23.1%	20.0%	20.2%
\$75,000-\$99,999	12.8%	9.9%	15.2%	14.5%	13.1%
\$100,000+	12.6%	23.8%	19.8%	18.4%	17.8%
Mean	ns	ns	64,572	61,717	ns
Median	ns	ns	55,000	55,000	ns
Market Size					
Under 500,000	29.8%	49.9%	19.0%	33.5%	48.9%
500,000 - 1,999,999	17.4%	19.7%	23.5%	26.6%	23.6%
2,000,000 and over	52.7%	30.4%	57.5%	39.9%	27.5%
Geographic Region					
New England	5.0%	ns	6.2%	3.0%	ns
Middle Atlantic	10.3%	11.5%	14.0%	10.4%	ns
East North Central	11.0%	16.4%	14.3%	13.8%	66.9%
West North Central	6.6%	9.9%	4.5%	5.1%	29.1%
South Atlantic	16.3%	13.4%	21.2%	27.6%	ns
East South Central	4.7%	13.6%	4.1%	9.3%	ns

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(NS indicates insufficient sample.)

Source: Retail Forward ShopperScape™ (09-28-2004 CH3)

Channel Report: Home Improvement/Hardware Stores

Figure 5 (continued)
Demographic Profile of Monthly Shoppers at Home Improvement/Hardware Stores for May '04



	Other hardware stores	Other lumberyards	Home Depot	Lowe's	Menard's
West South Central	8.4%	14.5%	11.5%	16.0%	ns
Mountain	8.8%	7.9%	8.5%	4.5%	ns
Pacific	28.9%	8.5%	15.6%	10.3%	ns
Household Size					
1 Members	29.8%	11.7%	20.4%	17.7%	25.5%
2 Members	34.4%	36.4%	36.5%	38.3%	36.9%
3 Members	13.9%	20.6%	17.2%	18.7%	15.5%
4 Members	13.5%	17.7%	15.7%	15.8%	15.2%
5 or More Members	8.5%	13.7%	10.2%	9.6%	7.0%
Life Stage					
Young Singles (under 45)	5.2%	ns	3.9%	3.3%	ns
Middle singles (35-64)	19.5%	9.0%	12.7%	10.9%	18.4%
Older singles (65+)	5.0%	ns	3.8%	3.4%	6.4%
Young couple (under 45)	9.2%	ns	8.8%	7.4%	7.5%
Working older (45+) couple	11.9%	18.2%	11.9%	14.0%	9.5%
Retired older (45+) couple	11.1%	16.1%	15.0%	17.4%	19.1%
Young parent (under 45)	11.8%	12.2%	15.3%	14.5%	14.5%
Middle parent (under 45)	7.3%	18.5%	10.3%	10.8%	7.6%
Older parent (45+)	15.4%	20.0%	16.4%	16.9%	15.1%
Roommates	3.6%	ns	1.9%	1.3%	ns

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(NS indicates insufficient sample.)

Source: Retail Forward ShopperScape™ (09-28-2004 CH3)

Channel Report: Home Improvement/Hardware Stores

Figure 6
Percent of Purchases of Merchandise Groups at Home Improvement/Hardware Stores in Past Month for May '04



Retailer	Home furnishings	Big-ticket Appliances	Big-ticket Home Improvement products	Small-ticket Home Improvement products	Furniture
Channel total	5.4%	24.4%	62.6%	42.7%	6.7%
Other lawn and garden store	ns	ns	1.1%	ns	ns
Ace Hardware	ns	ns	1.9%	3.7%	ns
Sears Hardware	ns	ns	2.6%	ns	ns
True Value	ns	ns	ns	1.6%	ns
Other hardware stores	ns	ns	1.2%	ns	ns
Other lumberyards	ns	ns	1.3%	ns	ns
Home Depot	1.9%	10.9%	28.9%	18.2%	ns
Lowe's	2.2%	10.9%	16.6%	13.3%	3.2%
Menard's	ns	ns	6.1%	2.8%	ns

(NS indicates insufficient sample.)

Read As: '1.1% of Big-ticket Home Improvement products purchasers reported spending the most on Big-ticket Home Improvement products at Other lawn and garden store.'

Source: Retail Forward ShopperScape™ (09-28-2004 CH4)

Channel Report: Home Improvement/Hardware Stores

Figure 7
Average Amount Spent at Home Improvement/Hardware Stores for Merchandise Groups for May '04



Merchandise	All	Channel Total	Ace Hardware	Home Depot	Lowe's	Menard's
Women's clothing	\$62					
Men's clothing	\$79					
Childrens/teens clothing	\$72					
Shoes	\$65					
Accessories	\$48					
Home furnishings	\$73	\$248	ns	ns	\$103	ns
Small-ticket Appliances	\$46	ns	ns			ns
Big-ticket Appliances	\$557	\$525	ns	\$507	\$521	ns
Big-ticket Consumer Electronics	\$421					
Small-ticket Consumer Electronics	\$119					
Computers/computer products	\$472					
Toys, sporting goods, media products	\$58					
Big-ticket Home Improvement products	\$388	\$340	ns	\$346	\$365	\$193
Small-ticket Home Improvement products	\$59	\$70	\$44	\$63	\$83	ns
Health and Beauty Aids	\$38					
School/office supplies, film, cards, small housewares	\$32	ns		ns		
Jewelry	\$415					
Furniture	\$523	ns		ns	ns	

(NS indicates insufficient sample.)

Read As: 'Home furnishings purchasers at Lowe's reported spending an average of \$103 for this category at Lowe's.'

Source: Retail Forward ShopperScape™ (09-28-2004 CH5)

Channel Report: Home Improvement/Hardware Stores

Figure 8
Percent Planning to Buy Selected Broad Merchandise Groups (and Component Categories) in the Coming Month



Merchandise	Nov '03	Dec '03	Jan '04	Feb '04	Mar '04	Apr '04	May '04
Home furnishings	43.1%	43.3%	40.1%	39.3%	41.4%	39.9%	39.3%
Bath Textiles	17.4%	16.1%	15.6%	14.3%	16.0%	15.1%	16.4%
Bedroom Textiles	15.5%	15.7%	16.0%	13.7%	15.9%	15.3%	15.1%
Kitchen Textiles	13.3%	10.8%	11.7%	10.1%	11.5%	11.5%	12.3%
Window Coverings	14.8%	16.5%	14.9%	14.5%	16.8%	15.4%	15.9%
Cookware	13.1%	10.8%	10.7%	9.5%	10.1%	10.2%	10.0%
Everyday Tableware	9.0%	8.5%	8.1%	7.3%	7.7%	8.4%	7.9%
Fine Tableware	4.7%	5.6%	5.1%	4.3%	4.6%	5.1%	5.6%
Home Accent Pieces	17.8%	16.5%	15.8%	15.7%	16.4%	15.9%	14.9%
Lamps	8.8%	9.1%	10.0%	8.8%	9.5%	9.4%	9.6%
Rugs	12.2%	13.2%	13.5%	12.3%	13.9%	13.0%	13.1%
Small-ticket Appliances	16.2%	13.4%	12.6%	11.7%	12.0%	12.2%	12.1%
Small Kitchen Appliance	11.8%	9.9%	9.6%	8.7%	9.1%	9.5%	8.9%
Small Personal Appliance	8.3%	6.9%	6.9%	6.1%	5.8%	6.4%	6.8%
Big-ticket Appliances	13.6%	14.7%	12.8%	12.1%	13.2%	12.7%	14.1%
Refrigerators Or Freezers	4.6%	5.8%	5.4%	4.7%	5.4%	5.4%	6.1%
Stoves, Ranges, Large Or Built-In Microwaves, Hood Vents	4.6%	5.6%	5.1%	4.4%	4.8%	5.1%	5.4%
Dishwashers	4.2%	5.2%	4.5%	4.2%	4.1%	4.4%	5.0%
Washers Or Dryers	4.4%	5.6%	4.9%	4.4%	4.3%	5.0%	5.6%
Floor Care Appliances	7.2%	7.4%	6.6%	5.9%	6.4%	6.1%	6.3%
Other Major Appliances	4.1%	4.9%	4.4%	3.5%	4.5%	5.0%	6.0%
Big-ticket Home Improvement products	17.9%	19.0%	17.1%	17.5%	21.2%	20.6%	21.3%
Building Materials	9.8%	11.5%	10.7%	10.9%	13.4%	13.2%	13.2%
Carpeting	5.1%	6.6%	5.3%	5.7%	5.6%	5.5%	6.4%
Other Flooring	7.4%	7.8%	7.9%	7.1%	8.1%	7.3%	8.5%
Power Tools	7.2%	6.0%	5.4%	4.3%	4.9%	5.3%	5.5%

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Read As: '16.4% of shoppers surveyed in May '04 reported they plan to purchase Bath Textiles in the next 4 weeks.'

Source: Retail Forward ShopperScape™ (09-28-2004 CH6)

Channel Report: Home Improvement/Hardware Stores

Figure 8 (continued)
Percent Planning to Buy Selected Broad Merchandise Groups (and Component Categories) in the Coming Month



Merchandise	Nov '03	Dec '03	Jan '04	Feb '04	Mar '04	Apr '04	May '04
Power Lawn And Garden	4.3%	5.2%	4.6%	4.4%	6.1%	6.1%	6.6%
Small-ticket Home Improvement products	29.6%	30.1%	31.7%	38.7%	49.2%	47.2%	43.0%
Paint	6.8%	6.8%	5.8%	5.6%	5.5%	5.5%	6.3%
Wallpaper	5.5%	6.4%	6.2%	6.3%	6.7%	6.4%	6.6%
Hand Tool	7.3%	6.8%	5.8%	6.2%	7.2%	6.4%	6.8%
Hardware	9.9%	10.7%	10.6%	9.8%	11.9%	11.9%	11.8%
Plumbing Supplies	7.2%	8.4%	8.0%	7.5%	8.2%	7.5%	8.3%
School/office supplies, film, cards, small housewares	57.3%	54.3%	54.3%	53.4%	56.2%	55.4%	55.8%
Small Housewares	16.3%	16.0%	16.5%	13.7%	15.8%	14.9%	15.2%
Furniture	12.5%	14.2%	14.1%	13.0%	13.4%	12.2%	13.2%
Assembled Furniture	8.8%	10.7%	9.8%	9.6%	9.5%	8.7%	9.9%
Ready-To-Assemble/Assemble-It-Yourself Furniture	8.1%	9.0%	9.8%	8.3%	8.8%	8.5%	8.7%

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Source: Retail Forward ShopperScape™ (09-28-2004 CH6)

Channel Report: Home Improvement/Hardware Stores

Figure 9
Percent of Monthly Shoppers at Leading Home Improvement/Hardware Stores Also Shopping Monthly at Other Retailers for May '04



Retailer	Other lawn and garden store	Ace Hardware	Sears Hardware	True Value	Other hardware stores	Other lumberyards	Home Depot	Lowe's
Discount Stores /Supercenters	73.8%	70.9%	70.8%	67.9%	64.8%	65.8%	77.5%	80.4%
Fred Meyer	3.7%	2.4%	3.7%	4.1%	3.3%	ns	2.9%	1.7%
Kmart/Big Kmart	23.2%	29.7%	29.1%	24.7%	19.8%	20.4%	20.6%	22.0%
Meijer	2.0%	3.0%	ns	ns	2.1%	ns	4.7%	4.9%
Shopko	2.4%	3.6%	3.6%	3.9%	2.1%	7.9%	1.4%	ns
SuperTarget	8.2%	6.2%	7.2%	ns	5.6%	10.0%	7.4%	7.7%
Target/Target Greatland	31.9%	29.3%	31.9%	28.4%	32.6%	26.5%	35.5%	31.3%
Wal-Mart	34.5%	36.0%	37.7%	35.4%	31.7%	33.0%	37.5%	36.6%
Wal-Mart Supercenter	32.9%	30.7%	30.3%	26.2%	19.2%	34.6%	30.2%	44.1%
<i>(Net for Target/Target Greatland/SuperTarget)</i>	<i>38.1%</i>	<i>33.7%</i>	<i>37.9%</i>	<i>29.1%</i>	<i>36.4%</i>	<i>33.6%</i>	<i>40.7%</i>	<i>36.6%</i>
<i>(Net for Wal-Mart/Wal-Mart Supercenter)</i>	<i>54.1%</i>	<i>53.6%</i>	<i>53.2%</i>	<i>49.4%</i>	<i>43.0%</i>	<i>50.6%</i>	<i>56.3%</i>	<i>65.8%</i>
Small-Format Value Retailers	53.5%	53.6%	53.7%	51.5%	42.6%	52.6%	43.4%	52.1%
99¢	7.8%	7.3%	8.2%	7.6%	10.0%	8.1%	6.5%	6.1%
Big Lots	23.8%	21.9%	24.1%	24.8%	15.7%	23.7%	19.9%	24.1%
Dollar General	19.3%	21.3%	18.7%	14.7%	12.8%	20.1%	13.8%	22.8%
Dollar Tree	20.2%	22.0%	17.9%	22.0%	16.1%	17.2%	19.3%	24.3%
Family Dollar	16.5%	16.4%	15.3%	15.5%	9.4%	17.9%	11.6%	15.2%
Fred's	2.3%	2.1%	3.5%	ns	ns	ns	1.7%	2.6%
Odd Lots	ns	ns	ns	ns	2.3%	ns	1.4%	1.1%
Tuesday Morning	5.1%	6.0%	5.5%	6.9%	3.5%	ns	3.9%	4.6%
Other value store	7.1%	5.0%	4.8%	4.7%	4.2%	5.8%	4.4%	3.8%

(Continued on next page)

(NS indicates insufficient sample.)

Read As: 'In May '04, 3.7% of monthly Other lawn and garden store shoppers reported they also shop monthly at Fred Meyer.'

Source: Retail Forward ShopperScape™ (09-28-2004 CH7)

Channel Report: Home Improvement/Hardware Stores

Figure 9 (continued)
Percent of Monthly Shoppers at Leading Home Improvement/Hardware Stores Also Shopping Monthly at Other Retailers for May '04



Retailer	Other lawn and garden store	Ace Hardware	Sears Hardware	True Value	Other hardware stores	Other lumberyards	Home Depot	Lowe's
Warehouse Clubs	40.2%	39.7%	36.9%	42.3%	36.2%	36.3%	44.6%	44.6%
B.J.'s Wholesale Club	4.3%	4.8%	4.8%	4.3%	2.8%	ns	6.0%	3.0%
Costco	13.3%	16.0%	10.5%	17.1%	18.1%	8.2%	16.6%	11.1%
Sam's Club	26.4%	24.2%	26.5%	24.4%	18.3%	28.2%	27.1%	35.2%
Department Stores	57.6%	53.4%	78.6%	47.9%	46.5%	65.5%	49.7%	50.5%
Belk	3.9%	3.2%	4.2%	ns	ns	ns	2.9%	4.4%
Bloomingdale's	2.6%	3.6%	5.8%	ns	3.4%	6.2%	1.5%	1.4%
Burdine's	2.2%	2.6%	ns	ns	2.1%	ns	2.1%	2.6%
Carson Pirie Scott	ns	ns	ns	ns	ns	ns	1.2%	ns
Dillard's	8.9%	8.9%	13.4%	5.4%	5.6%	7.4%	8.0%	8.5%
Filene's	ns	ns	ns	ns	ns	ns	1.0%	ns
Foley's	4.0%	2.6%	5.6%	ns	2.1%	ns	2.9%	3.0%
Goldsmith's, Goldsmith's -Macy's	ns	ns	ns	ns	ns	ns	0.6%	1.2%
Hecht's	ns	3.1%	ns	ns	ns	ns	1.3%	1.1%
JCPenney	19.7%	20.1%	35.6%	19.4%	13.4%	28.7%	16.7%	22.0%
Kaufmann's	1.8%	ns	3.9%	ns	1.9%	ns	1.3%	1.3%
Kohl's	17.0%	17.2%	22.7%	19.2%	13.3%	20.6%	14.4%	15.7%
Lazarus, Lazarus-Macy's	ns	ns	4.2%	ns	ns	ns	0.7%	1.0%
Lord & Taylor	3.7%	1.9%	ns	ns	4.2%	ns	3.0%	1.7%
Macy's	8.1%	9.6%	11.8%	7.1%	10.1%	10.8%	7.5%	4.7%
Marshall Field's	3.8%	3.7%	4.6%	ns	2.6%	9.6%	2.9%	2.2%
Neiman-Marcus	2.0%	2.2%	ns	ns	2.6%	5.9%	1.3%	1.9%
Nordstrom	5.8%	5.5%	5.8%	5.0%	6.5%	10.6%	3.8%	2.7%
Rich's, Rich's-Macy's	ns	ns	ns	ns	ns	ns	1.2%	1.4%
Robinsons-May	ns	2.1%	ns	ns	3.2%	ns	1.1%	ns
Saks 5th Avenue	3.0%	3.0%	4.6%	ns	4.7%	8.7%	1.7%	2.1%

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(NS indicates insufficient sample.)

Source: Retail Forward ShopperScape™ (09-28-2004 CH7)

Channel Report: Home Improvement/Hardware Stores

Figure 9 (continued)
Percent of Monthly Shoppers at Leading Home Improvement/Hardware Stores Also Shopping Monthly at Other Retailers for May '04



Retailer	Other lawn and garden store	Ace Hardware	Sears Hardware	True Value	Other hardware stores	Other lumberyards	Home Depot	Lowe's
Sears	18.0%	22.3%	53.9%	20.8%	11.8%	24.6%	17.1%	18.2%
The Bon Marche, Bon-Macy's	2.3%	2.5%	ns	ns	ns	ns	1.1%	1.1%
Younkers	ns	2.5%	ns	ns	ns	ns	1.1%	1.0%
<i>(Net for Federated Dept. Stores)</i>	12.9%	12.9%	18.6%	12.2%	13.8%	20.1%	10.9%	10.6%
<i>(Net for May Dept. Stores)</i>	28.0%	29.0%	60.7%	29.4%	19.4%	33.0%	25.6%	25.7%
Other department store	13.2%	5.9%	9.7%	10.1%	10.5%	14.9%	5.3%	5.2%
Apparel Specialty Stores	60.9%	55.2%	55.8%	49.6%	52.2%	68.7%	49.6%	46.8%
Abercrombie & Fitch	3.2%	3.9%	5.6%	ns	1.9%	ns	2.1%	2.4%
American Eagle Outfitters	3.3%	4.4%	4.8%	ns	2.8%	9.8%	2.5%	1.9%
Ann Taylor	1.8%	2.6%	ns	ns	ns	ns	1.8%	1.1%
Ann Taylor Loft	2.2%	2.4%	ns	ns	1.9%	ns	1.4%	2.0%
Banana Republic	2.9%	3.0%	4.4%	ns	3.1%	ns	2.5%	3.0%
Burlington Coat Factory	5.2%	6.3%	11.9%	4.2%	5.3%	8.7%	5.4%	4.0%
Casual Corner	2.9%	4.2%	4.9%	6.6%	2.2%	4.8%	2.5%	1.9%
Cato	2.3%	3.0%	ns	ns	ns	ns	2.2%	2.6%
Chico's	2.1%	ns	4.2%	ns	ns	ns	1.4%	ns
Christopher & Banks	ns	ns	ns	ns	ns	ns	1.1%	ns
Dress Barn	3.3%	ns	ns	4.9%	2.4%	ns	2.0%	1.9%
Eddie Bauer	3.4%	3.6%	6.7%	4.0%	3.0%	ns	2.0%	1.3%
Express/Express Men's	1.8%	ns	ns	ns	2.7%	ns	1.4%	ns
Fashion Bug/Fashion Bug Plus	3.1%	4.0%	7.8%	4.6%	1.9%	7.3%	3.4%	3.5%
Gap	8.6%	9.1%	9.3%	8.3%	7.7%	10.0%	7.1%	5.5%
Goody's Family Clothing	5.1%	3.3%	6.2%	ns	2.1%	5.6%	2.0%	4.4%
J. Crew	2.0%	2.0%	ns	ns	ns	ns	1.5%	1.3%
L.L. Bean	5.2%	4.8%	3.3%	ns	6.1%	6.2%	2.8%	2.2%
Lands' End	8.5%	7.7%	9.1%	6.2%	9.0%	10.8%	5.6%	5.0%
Lane Bryant	8.2%	4.8%	9.3%	9.5%	6.1%	8.5%	5.3%	5.4%

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(NS indicates insufficient sample.)

Source: Retail Forward ShopperScape™ (09-28-2004 CH7)

Channel Report: Home Improvement/Hardware Stores

Figure 9 (continued)
Percent of Monthly Shoppers at Leading Home Improvement/Hardware Stores Also Shopping Monthly at Other Retailers for May '04



Retailer	Other lawn and garden store	Ace Hardware	Sears Hardware	True Value	Other hardware stores	Other lumberyards	Home Depot	Lowe's
Lerner NY/New York & Co.	2.1%	2.3%	4.9%	ns	2.8%	ns	1.9%	1.4%
Limited Stores	2.1%	ns	4.0%	ns	2.3%	ns	2.2%	1.4%
Men's Wearhouse	1.9%	ns	ns	ns	ns	ns	ns	ns
Old Navy	14.6%	11.1%	17.0%	16.9%	12.3%	22.2%	12.9%	10.6%
Pacific Sunwear	ns	2.2%	ns	ns	ns	ns	ns	ns
Ross Dress for Less	6.3%	6.3%	ns	4.2%	10.0%	ns	6.4%	5.6%
Spiegel	3.4%	3.9%	5.7%	ns	2.3%	ns	2.1%	1.9%
Stein Mart	5.6%	5.7%	4.1%	ns	3.0%	ns	4.3%	3.6%
Talbot's (petite, misses, or womans)	ns	ns	ns	ns	2.0%	ns	0.8%	1.4%
TJMaxx or Marshall's	15.4%	15.3%	18.0%	11.0%	13.4%	15.4%	15.0%	12.1%
Value City/Schottenstein's	2.9%	2.0%	4.2%	5.9%	ns	7.0%	2.1%	1.8%
Victoria's Secret	7.5%	7.9%	10.8%	6.5%	8.1%	12.3%	7.1%	7.5%
Wilson's Leather	2.4%	ns	4.0%	ns	ns	ns	0.9%	1.1%
<i>(Net for Gap, Inc.)</i>	19.2%	18.1%	22.9%	20.8%	17.0%	26.7%	17.0%	15.1%
<i>(Net for Limited Brands, Inc.)</i>	10.5%	10.6%	13.6%	8.5%	10.9%	15.6%	8.9%	9.0%
Other clothing specialty store	13.2%	8.6%	9.6%	9.5%	9.9%	17.9%	7.4%	7.7%
<i>(Net for Children's spec. clothing)</i>	16.8%	13.9%	21.6%	14.0%	16.2%	30.0%	13.5%	11.9%
GapKids or babyGap	5.5%	4.8%	9.4%	4.7%	6.8%	11.3%	4.4%	4.7%
Gymboree	ns	ns	3.4%	ns	ns	ns	1.9%	1.7%
Kids R Us/Babies R Us	6.5%	6.9%	10.3%	4.9%	7.1%	12.6%	5.6%	6.6%
Limited Too	3.2%	2.0%	3.5%	ns	ns	ns	1.5%	1.1%
The Children's Place	3.7%	2.1%	4.5%	ns	3.6%	5.1%	5.0%	3.7%
Other children's clothing specialty store	7.4%	3.1%	11.2%	4.0%	6.3%	13.9%	3.6%	2.7%
Outlet Stores	26.1%	18.5%	20.8%	21.8%	20.7%	34.5%	13.0%	14.8%
Factory outlet apparel store	15.1%	9.6%	10.5%	12.4%	13.8%	19.1%	8.7%	9.7%

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(NS indicates insufficient sample.)

Source: Retail Forward ShopperScape™ (09-28-2004 CH7)

Channel Report: Home Improvement/Hardware Stores

Figure 9 (continued)
Percent of Monthly Shoppers at Leading Home Improvement/Hardware Stores Also Shopping Monthly at Other Retailers for May '04



Retailer	Other lawn and garden store	Ace Hardware	Sears Hardware	True Value	Other hardware stores	Other lumberyards	Home Depot	Lowe's
Factory outlet shoe store	8.9%	7.7%	11.2%	7.2%	6.4%	14.5%	4.9%	5.8%
Factory outlet home fashions /home furnishings store	7.3%	5.8%	6.2%	6.6%	5.2%	8.4%	2.5%	3.4%
Other factory outlet store	10.1%	6.1%	7.3%	5.8%	6.2%	8.4%	4.6%	3.9%
Shoe Retailers	36.4%	30.9%	38.4%	35.5%	28.8%	46.3%	25.2%	23.7%
DSW	4.4%	3.3%	3.6%	ns	2.4%	ns	3.0%	2.9%
Easy Spirit shoe stores	3.0%	ns	5.2%	4.9%	2.2%	ns	1.1%	ns
Famous Footwear	6.5%	6.4%	6.7%	8.8%	4.9%	9.0%	4.8%	4.2%
Foot Action	2.7%	3.5%	ns	ns	2.3%	5.2%	1.3%	1.8%
Footlocker or Lady Footlocker	6.2%	4.4%	10.7%	7.8%	3.8%	12.1%	3.6%	2.6%
Journeys	1.6%	ns	ns	ns	ns	ns	ns	ns
Naturalizer shoe stores	2.4%	ns	4.0%	ns	2.9%	5.8%	1.1%	1.2%
Nine West shoe stores	4.3%	3.9%	ns	ns	2.7%	4.9%	2.4%	1.5%
Payless ShoeSource	17.6%	16.0%	19.5%	18.5%	11.9%	20.6%	13.2%	12.3%
The Finish Line	1.9%	2.0%	3.6%	ns	ns	6.5%	0.9%	ns
Other shoe store	12.3%	9.9%	12.1%	10.0%	11.5%	17.1%	6.0%	5.5%
Jewelry Retailers	27.2%	23.2%	28.2%	25.4%	20.2%	47.2%	12.8%	13.1%
Kay Jewelers	4.8%	3.8%	6.1%	ns	4.0%	10.6%	1.6%	2.0%
Zales	4.6%	4.6%	7.4%	5.1%	3.4%	9.7%	1.8%	2.4%
Other fine jewelry store	11.7%	4.9%	6.7%	5.6%	5.7%	18.8%	4.1%	3.3%
Claire's	8.9%	10.1%	11.1%	11.6%	7.9%	16.4%	5.4%	5.8%
Coach	2.1%	3.0%	4.3%	ns	2.9%	6.9%	1.0%	1.8%
Other accessories store	11.1%	5.4%	7.5%	6.9%	7.3%	18.9%	3.7%	3.6%
CE/Appliance/Computer Retailers	48.7%	41.9%	54.1%	44.6%	33.6%	63.9%	34.2%	33.5%
Best Buy	23.8%	20.7%	26.6%	23.8%	15.8%	27.3%	19.6%	17.7%

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(NS indicates insufficient sample.)

Source: Retail Forward ShopperScape™ (09-28-2004 CH7)

Channel Report: Home Improvement/Hardware Stores

Figure 9 (continued)
Percent of Monthly Shoppers at Leading Home Improvement/Hardware Stores Also Shopping Monthly at Other Retailers for May '04



Retailer	Other lawn and garden store	Ace Hardware	Sears Hardware	True Value	Other hardware stores	Other lumberyards	Home Depot	Lowe's
Circuit City	14.0%	14.4%	25.6%	15.9%	8.5%	20.6%	10.5%	12.1%
Fry's Electronics	3.7%	4.1%	6.3%	4.8%	2.8%	ns	2.7%	2.9%
RadioShack	15.7%	16.2%	28.8%	15.7%	7.2%	25.8%	8.8%	9.1%
Other consumer electronics store	8.1%	4.5%	7.3%	4.1%	4.7%	12.2%	3.6%	3.9%
CompUSA	2.2%	5.1%	5.7%	5.7%	1.8%	ns	3.3%	3.4%
Other computer store	18.9%	13.9%	16.9%	13.4%	14.6%	33.3%	7.0%	7.9%
Home Furnishings /Domestics Retailers	44.6%	35.6%	43.6%	33.1%	28.8%	50.5%	28.8%	28.0%
Bed Bath & Beyond	22.6%	19.1%	20.0%	19.1%	13.6%	20.9%	14.8%	15.3%
Bombay	3.6%	ns	ns	ns	2.0%	ns	2.1%	2.3%
Crate & Barrel	3.9%	4.1%	ns	5.7%	2.6%	ns	2.7%	1.9%
Linens 'N Things	14.6%	13.0%	17.4%	14.4%	9.4%	11.6%	11.2%	11.1%
Pier 1 Imports	17.3%	12.3%	14.2%	15.8%	8.1%	18.8%	10.2%	9.3%
Pottery Barn	7.1%	5.1%	7.3%	4.8%	3.7%	10.3%	4.0%	3.4%
Williams-Sonoma	5.9%	3.3%	ns	ns	3.4%	6.9%	3.6%	3.8%
Other home furnishings store	8.5%	4.5%	ns	4.0%	4.4%	12.4%	3.3%	3.3%
Furniture Store	12.6%	11.3%	14.8%	8.1%	8.2%	22.4%	4.7%	6.6%
Office Supply Retailers	44.8%	41.4%	51.0%	31.8%	28.1%	54.5%	38.9%	39.3%
Office Depot	26.6%	24.5%	29.4%	17.4%	14.8%	31.9%	21.3%	20.9%
Office Max	14.2%	16.4%	25.5%	18.4%	12.8%	22.4%	12.8%	14.6%
Staples	20.8%	18.2%	25.4%	19.3%	14.4%	24.5%	17.1%	17.1%
Other office supply retailer	5.3%	3.3%	3.4%	3.8%	4.0%	6.3%	2.0%	2.1%
Books/Media Retailers	48.8%	40.3%	40.2%	31.4%	37.0%	51.7%	32.6%	31.3%
Barnes & Noble	30.0%	25.4%	24.6%	23.0%	20.4%	25.0%	20.2%	20.0%
Books a Million	5.5%	5.4%	4.2%	ns	3.7%	10.0%	4.0%	4.7%

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(NS indicates insufficient sample.)

Source: Retail Forward ShopperScape™ (09-28-2004 CH7)

Channel Report: Home Improvement/Hardware Stores

Figure 9 (continued)
Percent of Monthly Shoppers at Leading Home Improvement/Hardware Stores Also Shopping Monthly at Other Retailers for May '04



Retailer	Other lawn and garden store	Ace Hardware	Sears Hardware	True Value	Other hardware stores	Other lumberyards	Home Depot	Lowe's
Borders Books and Music	12.8%	10.5%	12.9%	9.0%	10.3%	12.2%	9.7%	8.8%
Media Play	2.1%	ns	5.0%	ns	ns	ns	2.6%	1.4%
Tower Records	1.7%	2.6%	ns	ns	2.8%	ns	1.9%	0.9%
Virgin Megastore	ns	2.4%	ns	ns	ns	ns	ns	0.9%
Other book or music specialty store	16.1%	9.5%	13.5%	7.7%	12.9%	25.5%	6.2%	6.8%
Gadget/Gift/Theme Retailers	51.4%	36.6%	36.3%	31.5%	35.1%	52.6%	31.8%	30.1%
Brookstone	1.8%	2.2%	ns	ns	ns	ns	1.0%	1.0%
Discovery Channel Store	ns	ns	ns	ns	ns	ns	1.0%	1.0%
Disney Store	6.4%	9.0%	11.7%	9.2%	6.2%	13.4%	4.6%	5.1%
Sharper Image	4.8%	3.4%	ns	3.9%	ns	ns	1.6%	1.9%
Other gadget/gift/theme specialty store	22.2%	7.1%	10.2%	5.9%	10.9%	25.6%	7.9%	8.2%
Hallmark	23.5%	20.8%	22.6%	17.8%	17.4%	23.3%	18.7%	16.2%
Other card/gift specialty store	6.0%	5.6%	5.1%	4.7%	4.5%	ns	3.8%	2.7%
Other novelty specialty retailer	8.6%	4.8%	ns	5.4%	6.0%	9.5%	3.6%	3.5%
Sporting Goods Stores	21.5%	15.4%	19.1%	15.7%	17.8%	30.0%	10.1%	10.4%
Dicks Sporting Goods	2.9%	2.0%	3.9%	ns	2.4%	ns	1.6%	2.7%
Galyan's	2.3%	2.2%	ns	ns	ns	ns	1.3%	1.0%
Sportmart	1.7%	ns	ns	ns	ns	ns	0.8%	ns
Sports Authority	4.2%	5.2%	6.5%	4.9%	2.5%	ns	3.0%	3.0%
Other sporting goods store	11.6%	6.2%	8.2%	8.7%	11.9%	21.2%	4.3%	4.3%

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(NS indicates insufficient sample.)

Source: Retail Forward ShopperScape™ (09-28-2004 CH7)

Channel Report: Home Improvement/Hardware Stores

Figure 9 (continued)
Percent of Monthly Shoppers at Leading Home Improvement/Hardware Stores Also Shopping Monthly at Other Retailers for May '04



Retailer	Other lawn and garden store	Ace Hardware	Sears Hardware	True Value	Other hardware stores	Other lumberyards	Home Depot	Lowe's
Home Improvement /Hardware Stores								
Franks Nursery	2.9%	2.8%	6.6%	5.1%	ns	ns	2.1%	1.6%
Other lawn and garden store	---	23.3%	24.1%	23.1%	16.8%	55.9%	18.5%	19.9%
Ace Hardware	19.6%	---	25.9%	37.3%	11.5%	21.3%	14.1%	12.4%
Orchard	2.1%	ns	ns	ns	2.6%	ns	1.8%	ns
Sears Hardware	11.4%	14.6%	---	15.8%	5.9%	19.9%	7.7%	10.4%
True Value	9.7%	18.6%	14.0%	---	5.6%	15.5%	6.2%	7.1%
Other hardware stores	16.3%	13.3%	12.1%	12.9%	---	22.7%	9.9%	9.2%
84 Lumber	ns	2.2%	ns	3.8%	ns	ns	0.6%	1.3%
Other lumberyards	19.1%	8.7%	14.4%	12.6%	8.0%	---	5.0%	6.6%
Home Depot	51.6%	46.9%	45.7%	41.3%	28.5%	40.8%	---	52.7%
Lowe's	38.5%	28.6%	42.3%	32.9%	18.2%	37.6%	36.5%	---
Menard's	5.9%	9.6%	7.1%	7.9%	2.7%	12.4%	5.3%	4.0%
Sherwin Williams	6.4%	6.1%	10.7%	7.1%	3.9%	12.5%	1.6%	2.8%
Other specialty home improvement store	12.2%	4.6%	5.5%	4.0%	5.4%	20.6%	3.4%	3.8%
Drug Stores								
CVS/pharmacy	16.7%	23.0%	27.1%	20.0%	13.0%	18.2%	19.2%	21.5%
Duane Reade	ns	ns	ns	ns	1.8%	ns	0.7%	ns
Eckerd	10.9%	12.5%	12.6%	7.1%	9.3%	ns	13.0%	11.6%
Longs	1.9%	3.6%	ns	ns	7.1%	ns	2.7%	2.2%
Osco	5.5%	6.2%	5.1%	3.9%	2.8%	5.9%	3.9%	2.4%
Rite Aid	9.0%	12.7%	11.1%	11.8%	14.0%	8.0%	9.4%	10.0%
Sav-On	2.3%	2.7%	ns	ns	6.7%	ns	2.6%	1.5%
Walgreens	27.4%	30.8%	32.9%	14.7%	26.9%	20.7%	28.7%	29.8%
Other drug store	15.7%	11.9%	11.3%	14.5%	10.2%	18.4%	7.8%	8.9%

(Continued on next page)

(NS indicates insufficient sample.)

Source: Retail Forward ShopperScape™ (09-28-2004 CH7)

Channel Report: Home Improvement/Hardware Stores

Figure 9 (continued)
Percent of Monthly Shoppers at Leading Home Improvement/Hardware Stores Also Shopping Monthly at Other Retailers for May '04



Retailer	Other lawn and garden store	Ace Hardware	Sears Hardware	True Value	Other hardware stores	Other lumberyards	Home Depot	Lowe's
Convenience Stores	53.1%	55.9%	49.7%	46.2%	47.9%	45.2%	55.0%	58.5%
Non-gasoline purchases at a convenience store / gas station with food mart	25.5%	29.4%	27.5%	23.7%	26.1%	24.0%	25.5%	27.8%
Gasoline purchases at a convenience store / gas station with food mart	48.7%	48.4%	42.2%	38.4%	41.1%	38.4%	50.4%	53.3%
Supermarkets	82.3%	86.2%	79.8%	81.6%	75.3%	75.8%	87.8%	84.1%
A&P	ns	ns	ns	ns	ns	ns	1.7%	0.9%
Acme	ns	ns	ns	ns	ns	ns	1.6%	1.9%
Albertsons	14.6%	15.0%	10.3%	9.0%	18.5%	7.4%	15.2%	11.9%
Aldi	7.4%	6.6%	6.9%	9.8%	4.4%	7.5%	4.8%	5.9%
Basha's or Food City	ns	ns	ns	ns	ns	ns	1.1%	ns
BI-LO	3.0%	4.2%	4.1%	ns	ns	ns	2.4%	3.9%
Brookshire Food	ns	ns	ns	ns	ns	ns	0.7%	1.0%
Cub Foods	2.6%	4.1%	ns	ns	1.7%	ns	1.8%	ns
Dominick's	ns	2.7%	ns	ns	ns	ns	1.5%	ns
Food 4 Less	3.7%	2.2%	ns	ns	4.4%	ns	2.6%	2.2%
Food Lion	5.1%	6.1%	4.9%	4.5%	3.1%	6.0%	3.7%	6.2%
Fry's	ns	ns	ns	ns	ns	ns	1.9%	1.4%
Giant Eagle	2.7%	ns	4.1%	ns	ns	ns	2.5%	3.1%
Giant Foods	2.5%	ns	ns	ns	2.3%	ns	3.2%	3.0%
Hannaford	ns	ns	ns	ns	ns	ns	1.3%	ns
Harris Teeter	2.3%	ns	ns	ns	ns	ns	2.1%	2.9%
H-E-B/Central Market	3.3%	ns	4.6%	ns	ns	ns	3.4%	4.1%
Hy-Vee	2.3%	3.5%	ns	ns	ns	ns	1.2%	1.9%
Ingles	ns	ns	ns	ns	ns	ns	1.0%	1.4%
Jewel/Jewel-Osco	3.2%	4.7%	ns	ns	2.3%	ns	3.1%	ns

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(NS indicates insufficient sample.)

Source: Retail Forward ShopperScape™ (09-28-2004 CH7)

Channel Report: Home Improvement/Hardware Stores

Figure 9 (continued)
Percent of Monthly Shoppers at Leading Home Improvement/Hardware Stores Also Shopping Monthly at Other Retailers for May '04



Retailer	Other lawn and garden store	Ace Hardware	Sears Hardware	True Value	Other hardware stores	Other lumberyards	Home Depot	Lowe's
Kash n' Karry	ns	ns	ns	ns	ns	ns	1.8%	1.8%
King Soopers	ns	ns	ns	ns	ns	ns	1.1%	ns
Kroger	10.4%	9.1%	12.3%	7.8%	5.1%	9.7%	11.5%	17.6%
Pathmark	1.9%	ns	ns	ns	ns	ns	2.0%	0.9%
Price Chopper	ns	ns	ns	ns	ns	ns	1.0%	ns
Publix	4.2%	8.8%	3.3%	ns	5.6%	ns	9.7%	9.2%
QFC	ns	ns	ns	ns	1.6%	ns	0.7%	ns
Raley's/Nob Hill	ns	3.0%	ns	ns	1.7%	ns	1.7%	1.2%
Ralph's	3.2%	2.1%	ns	ns	6.8%	ns	2.8%	2.0%
Safeway	6.9%	11.2%	5.5%	10.9%	9.8%	ns	9.0%	6.3%
Save-A-Lot	6.7%	6.8%	6.0%	10.1%	3.3%	10.7%	5.4%	5.8%
Shaw's Supermarkets	1.6%	ns	ns	ns	2.0%	ns	1.9%	0.8%
Shop Rite	1.8%	ns	ns	ns	ns	ns	3.4%	2.7%
Smith's Food and Drug	ns	ns	ns	ns	ns	ns	1.4%	ns
Stater Bros.	1.6%	ns	ns	ns	1.7%	ns	1.6%	1.4%
Stop & Shop	4.1%	3.3%	4.5%	4.4%	2.6%	5.0%	5.4%	2.5%
Tom Thumb	ns	ns	ns	ns	ns	ns	1.5%	ns
Tops	1.7%	ns	ns	ns	ns	ns	1.5%	1.2%
Vons	2.7%	ns	ns	4.5%	4.4%	ns	3.2%	2.1%
Wegman's	1.6%	ns	ns	ns	ns	ns	1.7%	1.1%
Winn-Dixie/Winn Dixie Marketplace	5.9%	10.0%	7.5%	3.9%	4.9%	5.3%	7.9%	10.8%
Other supermarket/grocery store	35.2%	30.8%	32.1%	30.9%	31.0%	35.8%	28.3%	33.6%
Whole Foods Market	5.8%	5.0%	5.9%	ns	8.8%	ns	6.1%	4.4%
Wild Oats	2.5%	1.9%	ns	ns	2.5%	ns	1.7%	0.9%
(Net for Ahold USA, Inc.)	5.8%	5.6%	7.5%	4.2%	3.6%	4.7%	6.1%	7.5%
(Net for Delhaize America, Inc .)	5.7%	7.6%	6.3%	5.2%	3.7%	6.0%	5.5%	8.1%

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(NS indicates insufficient sample.)

Source: Retail Forward ShopperScape™ (09-28-2004 CH7)

Channel Report: Home Improvement/Hardware Stores

Figure 9 (continued)
Percent of Monthly Shoppers at Leading Home Improvement/Hardware Stores Also Shopping Monthly at Other Retailers for May '04



Retailer	Other lawn and garden store	Ace Hardware	Sears Hardware	True Value	Other hardware stores	Other lumberyards	Home Depot	Lowe's
<i>(Net for The Kroger Co.)</i>	16.0%	15.6%	15.8%	11.4%	17.0%	14.1%	19.3%	22.3%
<i>(Net for Safeway-Inc.)</i>	9.6%	12.5%	7.3%	15.5%	14.2%	7.0%	12.2%	8.5%
Other Specialty Retailers	84.3%	78.9%	82.0%	74.4%	76.8%	89.2%	77.5%	75.3%
K*B Toy Stores	8.0%	5.5%	10.2%	7.6%	6.0%	7.2%	4.4%	4.1%
Toys "R" Us	19.8%	16.5%	17.3%	15.2%	11.2%	20.7%	13.1%	9.9%
Other toy store	3.2%	2.3%	5.6%	ns	3.8%	5.9%	1.7%	1.3%
Jo-Ann/Jo-Ann Etc.	15.7%	14.4%	13.6%	12.5%	12.3%	15.9%	11.8%	10.8%
Amazon.com	16.6%	14.9%	13.0%	15.7%	19.6%	20.9%	14.0%	14.3%
QVC TV or web site	8.7%	4.8%	8.5%	5.9%	6.4%	9.7%	6.4%	5.0%
Army/Navy Exchange	4.5%	ns	6.5%	ns	ns	6.4%	3.2%	3.3%
Bath & Body Works	21.6%	18.0%	22.8%	16.7%	10.7%	29.8%	15.4%	16.6%
Sephora	2.3%	ns	ns	ns	3.4%	ns	1.2%	0.8%
The Body Shop	3.4%	5.0%	7.0%	4.4%	2.5%	ns	2.1%	1.6%
Party plans/direct selling	9.7%	9.4%	8.7%	4.4%	8.5%	8.8%	8.1%	8.0%
Other personal care or beauty retailer	14.6%	7.8%	7.1%	9.4%	7.8%	17.8%	6.2%	5.1%
Michael's	23.2%	23.7%	19.0%	16.1%	21.4%	17.5%	20.4%	17.4%
Other craft/hobby store	15.1%	13.8%	11.9%	13.4%	13.0%	17.4%	10.6%	11.3%
Blockbuster	22.7%	17.9%	20.9%	25.0%	16.9%	15.4%	20.2%	18.7%
Other video/DVD/TV game system rental store	17.4%	13.1%	10.8%	12.6%	16.6%	19.2%	12.4%	13.2%
PETSMART	17.7%	14.1%	13.5%	10.4%	14.9%	14.3%	17.4%	16.0%
Petco	11.0%	7.6%	11.9%	5.4%	10.0%	10.3%	9.3%	8.5%
Other pet supply store	14.9%	8.6%	6.9%	7.9%	13.3%	16.0%	8.4%	7.2%
Advance Auto Parts	5.1%	5.6%	3.6%	ns	3.6%	6.6%	3.0%	5.2%
Auto Zone	10.7%	11.7%	13.8%	11.8%	5.1%	14.3%	8.5%	10.6%
Pep Boys	2.6%	3.6%	ns	ns	2.1%	ns	1.8%	2.6%
Other auto supply store	7.9%	10.2%	8.8%	12.0%	6.9%	14.2%	4.8%	5.3%

(Continued on next page)

(NS indicates insufficient sample.)

Source: Retail Forward ShopperScape™ (09-28-2004 CH7)

Channel Report: Home Improvement/Hardware Stores

Figure 9 (continued)
Percent of Monthly Shoppers at Leading Home Improvement/Hardware Stores Also Shopping Monthly at Other Retailers for May '04



Retailer	Menard's
Discount Stores / Supercenters	83.5%
Kmart/Big Kmart	32.0%
Meijer	11.6%
Shopko	14.0%
SuperTarget	8.0%
Target/Target Greatland	34.6%
Wal-Mart	44.1%
Wal-Mart Supercenter	36.6%
<i>(Net for Target/Target Greatland/SuperTarget)</i>	<i>39.6%</i>
<i>(Net for Wal-Mart/Wal-Mart Supercenter)</i>	<i>64.9%</i>
Small-Format Value Retailers	46.7%
Big Lots	14.1%
Dollar General	15.0%
Dollar Tree	19.7%
Family Dollar	16.0%
Tuesday Morning	4.9%
Other value store	5.2%
Warehouse Clubs	32.3%
Costco	4.3%
Sam's Club	30.8%
Department Stores	62.6%
Carson Pirie Scott	6.5%
JCPenney	22.1%
Kohl's	36.1%
Marshall Field's	7.2%

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Source: Retail Forward ShopperScape™ (09-28-2004 CH7)

Channel Report: Home Improvement/Hardware Stores

Figure 9 (continued)
Percent of Monthly Shoppers at Leading Home Improvement/Hardware Stores Also Shopping Monthly at Other Retailers for May '04



Retailer	Menard's
Sears	24.6%
Younkers	7.9%
<i>(Net for May Dept. Stores)</i>	25.9%
Other department store	5.4%
Apparel Specialty Stores	43.9%
Fashion Bug/Fashion Bug Plus	6.1%
Gap	4.7%
Lands' End	6.6%
Lane Bryant	4.9%
Old Navy	12.9%
TJMaxx or Marshall's	12.4%
Victoria's Secret	6.3%
<i>(Net for Gap, Inc.)</i>	15.6%
<i>(Net for Limited Brands, Inc.)</i>	7.1%
Other clothing specialty store	5.2%
<i>(Net for Children's spec. clothing)</i>	12.6%
Kids R Us/Babies R Us	4.4%
The Children's Place	5.2%
Outlet Stores	11.4%
Factory outlet apparel store	6.2%
Shoe Retailers	19.5%
Famous Footwear	6.2%
Payless ShoeSource	10.3%
Other shoe store	5.1%
Jewelry Retailers	13.6%
Other fine jewelry store	5.6%
Claire's	5.9%

(Continued on next page)

Source: Retail Forward ShopperScape™ (09-28-2004 CH7)

Channel Report: Home Improvement/Hardware Stores

Figure 9 (continued)
Percent of Monthly Shoppers at Leading Home Improvement/Hardware Stores Also Shopping Monthly at Other Retailers for May '04



Retailer	Menard's
CE/Appliance/Computer Retailers	32.2%
Best Buy	23.1%
Circuit City	6.0%
RadioShack	7.0%
Other computer store	10.4%
Home Furnishings /Domestics Retailers	25.9%
Bed Bath & Beyond	16.1%
Crate & Barrel	4.9%
Linens 'N Things	8.2%
Pier 1 Imports	11.5%
Furniture Store	11.3%
Office Supply Retailers	33.7%
Office Depot	15.0%
Office Max	14.2%
Staples	9.8%
Books/Media Retailers	27.8%
Barnes & Noble	21.4%
Borders Books and Music	9.3%
Other book or music specialty store	6.3%
Gadget/Gift/Theme Retailers	37.7%
Disney Store	5.3%
Other gadget/gift/theme specialty store	10.8%

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Source: Retail Forward ShopperScape™ (09-28-2004 CH7)

Channel Report: Home Improvement/Hardware Stores

Figure 9 (continued)
Percent of Monthly Shoppers at Leading Home Improvement/Hardware Stores Also Shopping Monthly at Other Retailers for May '04



Retailer	Menard's
Hallmark	18.0%
Other card/gift specialty store	4.9%
Other novelty specialty retailer	4.2%
Sporting Goods Stores	10.9%
Other sporting goods store	4.7%
Home Improvement /Hardware Stores	
Franks Nursery	5.5%
Other lawn and garden store	15.7%
Ace Hardware	21.4%
Sears Hardware	8.9%
True Value	8.8%
Other hardware stores	7.1%
Other lumberyards	11.3%
Home Depot	39.5%
Lowe's	20.5%
Other specialty home improvement store	5.1%
Drug Stores	57.8%
CVS/pharmacy	7.0%
Osco	13.6%
Walgreens	38.0%
Other drug store	13.5%
Convenience Stores	61.0%
Non-gasoline purchases at a convenience store / gas station with food mart	27.4%

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Source: Retail Forward ShopperScape™ (09-28-2004 CH7)

Channel Report: Home Improvement/Hardware Stores

Figure 9 (continued)
Percent of Monthly Shoppers at Leading Home Improvement/Hardware Stores Also Shopping Monthly at Other Retailers for May '04



Retailer	Menard's
Gasoline purchases at a convenience store / gas station with food mart	57.2%
Supermarkets	83.9%
Aldi	20.0%
Cub Foods	15.7%
Dominick's	7.3%
Hy-Vee	15.0%
Jewel/Jewel-Osco	19.7%
Kroger	8.6%
Save-A-Lot	8.3%
Other supermarket/grocery store (Net for The Kroger Co.)	47.0% 9.4%
Other Specialty Retailers	72.8%
Toys "R" Us	11.6%
Jo-Ann/Jo-Ann Etc.	15.9%
Amazon.com	10.2%
QVC TV or web site	8.4%
Bath & Body Works	13.6%
The Body Shop	4.6%
Party plans/direct selling	7.7%
Other personal care or beauty retailer	4.5%
Michael's	18.1%
Other craft/hobby store	16.0%
Blockbuster	12.7%
Other video/DVD/TV game system rental store	12.2%
PETSMART	10.3%
<i>(Continued on next page)</i>	
Source: Retail Forward ShopperScape™ (09-28-2004 CH7)	

Channel Report: Home Improvement/Hardware Stores

Figure 9 (continued)
Percent of Monthly Shoppers at Leading Home Improvement/Hardware Stores Also Shopping Monthly at Other Retailers for May '04



Retailer	Menard's
Petco	16.1%
Other pet supply store	6.7%
Other auto supply store	5.9%

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Source: Retail Forward ShopperScape™ (09-28-2004 CH7)

Channel Report: Home Improvement/Hardware Stores

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.

Channel Report: Home Improvement/Hardware Stores

Source: Retail Forward ShopperScape™

Execution Status:

Retail Forward ShopperScape Report Generator v2.27 - 1.06
09-28-2004 - 13:43:38

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	08/06/04	12:18:00
Aug'04	09/08/04	11:52:00
Sep'04	n/a	
Oct'04	n/a	
Nov'04	n/a	
Dec'04	n/a	
Jan'05	n/a	