

NEWS RELEASE



FOR IMMEDIATE RELEASE

Costco Still Tops In Department Store Customer Satisfaction

Walmart slips, so does Hudson's Bay

In a random sampling of public opinion taken by the Forum Poll™ among 780 adult Canadians, Costco is seen to have the highest customer satisfaction among Canada's leading department stores, and is clearly ahead of any other Canadian store chain.

Overall, almost all Costco customers are satisfied with the store (91%), and as many as two thirds are "very satisfied" (62%), Incidence of visiting this store is about two thirds (64%), and the average satisfaction score is 3.5 out of 4.0. This is almost identical to three years ago, when Costco scored two thirds "very satisfied" (August, 2013 - 62%) with an average score also of 3.5 out of 4.0.

While Ogilvy, a one-store company in Montreal, does very well, the sample size of shoppers is too small to permit detailed analysis.

In overall second place is Winners (incidence of use - 50%), with a "very satisfied" score of close to 4-in-10 (38%) and an average of 3.1. This is similar to its standing in 2013 ("very satisfied" - 35%, average score - 3.1).

Walmart (incidence of use - 86%) is in third place (33% "very satisfied", 3.1 out of 4.0) and this is well down from three years ago (40%, 3.1).

Hudson's Bay (incidence of use - 44%) follows, with a "very satisfied" rating of 3-in-10 (31%) and an average score of 3.1. This also represents a slip for this store (from 40%, 3.1 out of 4.0).

Sears (incidence of use - 54%) follows, with a "very satisfied" rating from one quarter of shoppers (26%) and an average score of 2.9 out of 4.0. This is a decline from three years ago (34%, 3.1 out of 4.0).

Then comes Marshall's (incidence of use - 18%) with a "very satisfied" rating of one quarter (24%) and an average score of 2.7 out of 4.0. Marshall's scores have suffered since 2013 (35%/2.8 out of 4.0).

At the bottom of our list is Holt Renfrew (incidence of use in its markets - 7%) with a "very satisfied" rating of just one sixth (15%), and an average score as low as 2.2 out of 4.0. It must be pointed out the sample of Holt shoppers is small, and caution should be employed in analyzing these data.

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TORONTO

May 30th, 2016

HIGHLIGHTS:

- Costco is seen to have the highest customer satisfaction among Canada's leading department stores
- Almost all Costco customers are satisfied with the store (91%)
- In overall second place is Winners
- Walmart is in third place with 33% "very satisfied"
- Hudson's Bay follows, with a "very satisfied" rating of 31%
- Sears follows, with a "very satisfied" rating from 26% of shoppers
- Then comes Marshall's with a "very satisfied" rating of one quarter (24%)
- Last is Holt Renfrew, with a "very satisfied" rating of just one sixth (15%)

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The average score for all stores is 3.2 out of 4.0.

“Once again, as was the case three years ago, almost everyone who shops at Costco is satisfied, most of them to a high degree. Considering other stores which used to compete on this measure with Costco, like Walmart, have fallen behind, this leaves Costco in an even more dominant position than before. And the company maintains this high rating while paying its employees a living wage, which may give Walmart cause to think” said Forum Research President, Dr. Lorne Bozinoff.

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HIGHLIGHTS:

- The average score for all stores is 3.2 out of 4.0
- “Once again, as was the case three years ago, almost everyone who shops at Costco is satisfied, most of them to a high degree. Considering other stores which used to compete on this measure with Costco, like Walmart, have fallen behind, this leaves Costco in an even more dominant position than before. And the company maintains this high rating while paying its employees a living wage, which may give Walmart cause to think” said Forum Research President, Dr. Lorne Bozinoff

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Methodology

The Forum Poll™ was conducted by Forum Research with the results based on an interactive voice response telephone survey of 780 randomly selected Canadian adults. The poll was conducted on May 24th, 2016.

Results based on the total sample are considered accurate +/- 4%, 19 times out of 20. Subsample results will be less accurate. Margins of error for subsample (such as age, gender) results are available at www.forumresearch.com/samplestim.asp

Where appropriate, the data has been statistically weighted by age, region, and other variables to ensure that the sample reflects the actual population according to the latest Census data.

This research is not necessarily predictive of future outcomes, but rather, captures opinion at one point in time. Forum Research conducted this poll as a public service and to demonstrate our survey research capabilities. Forum houses its poll results in the Data Library of the Department of Political Science at the University of Toronto.

With offices across Canada and around the world, 100% Canadian-owned Forum Research is one of the country's leading survey research firms. This Forum Poll™ and other polls may be found at Forum's poll archive at www.forumresearch.com/polls.asp

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2013-2016 Trend/Summary Table:

%	May 2016 - % Used	May 2016 - Overall Satisfied	May 2016 - Very Satisfied	May 2016 - Average Score	August 15th, 2013 - % Used	August 15th 2013 - Overall Satisfied	August 15th, 2013 - Very Satisfied	August 15th, 2013 - Average Score
Costco	64	91	62	3.5	57	91	62	3.5
Winners	50	81	38	3.1	46	80	35	3.1
Wal- Mart	86	82	33	3.1	83	82	40	3.1
Hudson' s Bay	44	79	31	3.1	44	80	40	3.1
Sears	54	74	26	2.9	63	81	34	3.1
Marshall 's	18	61	24	2.7	11	65	35	2.8
Holt Renfrew	7	39	15	2.2	8	61	32	2.7

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Hudson's Bay

'Overall, how satisfied are you with your overall shopping experience with each of the following stores in the past 12 months? If you haven't visited that store in the last 12 months, just press 9. The first store is...'

[NS, NB, QC, ON, MB, SK, AB, BC ONLY]

Age / Gender

%	Total	18-34	35-44	45-54	55-64	65+	Male	Female
Sample	335	64	60	55	72	84	150	179
NET: Top2	79	70	75	87	75	91	78	81
NET: Btm2	21	30	25	13	25	9	22	19
Very Satisfied	31	32	26	20	37	47	28	35
Somewhat Satisfied	47	38	49	67	38	44	50	46
Somewhat Dissatisfied	18	22	24	12	21	7	19	17
Very Dissatisfied	3	7	1	1	4	3	3	2

Income

%	Total	<20K	20-40K	40-60K	60-80K	80-100K	100-250K	250K+
Sample	335	29	56	42	43	34	82	9
NET: Top2	79	92	81	84	58	91	80	63
NET: Btm2	21	8	19	16	42	9	20	37
Very Satisfied	31	81	25	27	19	44	23	53
Somewhat Satisfied	47	11	55	57	39	46	57	9
Somewhat Dissatisfied	18	3	14	10	42	8	17	11
Very Dissatisfied	3	5	5	6	0	2	2	26

Region

%	Total	ATL	PQ	ON	MB SK	AB	BC
Sample	335	10	121	31	41	65	67
NET: Top2	79	66	87	77	85	78	72
NET: Btm2	21	34	13	23	15	22	28
Very Satisfied	31	50	31	29	38	28	34
Somewhat Satisfied	47	15	56	48	47	50	38
Somewhat Dissatisfied	18	18	10	23	9	18	19
Very Dissatisfied	3	16	4	0	5	3	9

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Sears

'Overall, how satisfied are you with your overall shopping experience with each of the following stores in the past 12 months? If you haven't visited that store in the last 12 months, just press 9. The first store is...'

[NF, PE, NS, NB, QC, ON, MB, SK, AB, BC ONLY]

Age / Gender

%	Total	18-34	35-44	45-54	55-64	65+	Male	Female
Sample	426	76	72	71	94	113	206	214
NET: Top2	74	67	75	74	77	80	78	69
NET: Btm2	26	33	25	26	23	20	22	31
Very Satisfied	26	21	31	16	32	38	30	22
Somewhat Satisfied	48	46	44	58	45	43	48	47
Somewhat Dissatisfied	16	15	20	17	18	12	12	22
Very Dissatisfied	10	17	6	9	5	8	10	9

Income

%	Total	<20K	20-40K	40-60K	60-80K	80-100K	100-250K	250K+
Sample	426	37	90	55	56	42	82	13
NET: Top2	74	91	75	61	71	81	73	66
NET: Btm2	26	9	25	39	29	19	27	34
Very Satisfied	26	44	24	33	19	26	26	12
Somewhat Satisfied	48	47	50	29	52	55	47	54
Somewhat Dissatisfied	16	2	18	31	13	17	25	11
Very Dissatisfied	10	7	7	8	16	2	1	22

Region

%	Total	ATL	PQ	ON	MB SK	AB	BC
Sample	426	47	167	35	54	68	55
NET: Top2	74	76	79	68	82	75	70
NET: Btm2	26	24	21	32	18	25	30
Very Satisfied	26	42	33	13	32	26	38
Somewhat Satisfied	48	34	46	55	50	49	32
Somewhat Dissatisfied	16	18	16	15	17	16	22
Very Dissatisfied	10	6	5	17	1	9	8

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Holt Renfrew

'Overall, how satisfied are you with your overall shopping experience with each of the following stores in the past 12 months? If you haven't visited that store in the last 12 months, just press 9. The first store is...'

[QC, ON, AB, BC ONLY]

Age / Gender

%	Total	18-34	35-44	45-54	55-64	65+	Male	Female
Sample	46	12	10	5	9	10	30	13
NET: Top2	39	28	37	58	58	65	43	38
NET: Btm2	61	72	63	42	42	35	57	62
Very Satisfied	15	7	20	21	38	15	16	14
Somewhat Satisfied	25	21	17	37	20	50	27	24
Somewhat Dissatisfied	26	29	35	42	0	7	17	51
Very Dissatisfied	35	43	28	0	42	28	40	12

Income

%	Total	<20K	20-40K	40-60K	60-80K	80-100K	100-250K	250K+
Sample	46	6	8	5	7	2	9	6
NET: Top2	39	10	50	48	13	82	64	33
NET: Btm2	61	90	50	52	87	18	36	67
Very Satisfied	15	10	13	29	0	0	15	20
Somewhat Satisfied	25	0	37	19	13	82	49	13
Somewhat Dissatisfied	26	71	30	0	4	18	0	46
Very Dissatisfied	35	20	20	52	83	0	36	21

Region

%	Total	ATL	PQ	ON	MB SK	AB	BC
Sample	46	0	12	4	0	17	13
NET: Top2	39	0	78	20	0	57	32
NET: Btm2	61	0	22	80	0	43	68
Very Satisfied	15	0	49	0	0	27	8
Somewhat Satisfied	25	0	30	20	0	30	24
Somewhat Dissatisfied	26	0	6	38	0	22	21
Very Dissatisfied	35	0	16	42	0	21	47

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Wal-Mart

'Overall, how satisfied are you with your overall shopping experience with each of the following stores in the past 12 months? If you haven't visited that store in the last 12 months, just press 9. The first store is...'

[NF, PE, NS, NB, QC, ON, MB, SK, AB, BC, YT, NT ONLY]

Age / Gender

%	Total	18-34	35-44	45-54	55-64	65+	Male	Female
Sample	657	133	116	114	146	148	302	342
NET: Top2	82	80	83	86	78	86	81	84
NET: Btm2	18	20	17	14	22	14	19	16
Very Satisfied	33	37	20	27	39	41	28	37
Somewhat Satisfied	49	43	63	59	39	44	53	47
Somewhat Dissatisfied	14	14	15	10	19	12	13	15
Very Dissatisfied	4	6	2	5	3	3	6	1

Income

%	Total	<20K	20-40K	40-60K	60-80K	80-100K	100-250K	250K+
Sample	657	85	116	82	86	69	117	12
NET: Top2	82	85	74	78	87	90	80	40
NET: Btm2	18	15	26	22	13	10	20	60
Very Satisfied	33	49	35	30	32	27	27	25
Somewhat Satisfied	49	36	39	48	55	63	53	15
Somewhat Dissatisfied	14	12	19	18	6	10	16	42
Very Dissatisfied	4	3	7	4	7	0	4	18

Region

%	Total	ATL	PQ	ON	MB SK	AB	BC
Sample	657	69	245	60	82	112	89
NET: Top2	82	88	86	83	81	76	72
NET: Btm2	18	12	14	17	19	24	28
Very Satisfied	33	39	39	29	30	26	33
Somewhat Satisfied	49	49	47	54	51	50	39
Somewhat Dissatisfied	14	9	12	13	13	19	19
Very Dissatisfied	4	3	2	4	6	5	9

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Costco

'Overall, how satisfied are you with your overall shopping experience with each of the following stores in the past 12 months? If you haven't visited that store in the last 12 months, just press 9. The first store is...'

[NF, NS, NB, QC, ON, MB, SK, AB, BC ONLY]

Age / Gender

%	Total	18-34	35-44	45-54	55-64	65+	Male	Female
Sample	512	103	95	94	107	113	243	258
NET: Top2	91	85	95	92	94	97	84	98
NET: Btm2	9	15	5	8	6	3	16	2
Very Satisfied	62	61	65	49	71	66	53	69
Somewhat Satisfied	30	24	30	43	24	31	31	28
Somewhat Dissatisfied	5	8	3	7	5	2	9	1
Very Dissatisfied	3	8	2	1	1	1	7	1

Income

%	Total	<20K	20-40K	40-60K	60-80K	80-100K	100-250K	250K+
Sample	512	55	78	58	67	55	111	20
NET: Top2	91	96	88	95	77	89	96	93
NET: Btm2	9	4	12	5	23	11	4	7
Very Satisfied	62	67	55	65	50	67	66	51
Somewhat Satisfied	30	29	33	30	27	21	29	42
Somewhat Dissatisfied	5	2	9	2	8	10	3	0
Very Dissatisfied	3	2	3	3	15	1	1	7

Region

%	Total	ATL	PQ	ON	MB SK	AB	BC
Sample	512	53	189	38	65	92	75
NET: Top2	91	93	96	86	91	94	93
NET: Btm2	9	7	4	14	9	6	7
Very Satisfied	62	70	66	61	58	55	58
Somewhat Satisfied	30	23	30	25	32	39	35
Somewhat Dissatisfied	5	4	3	8	8	3	2
Very Dissatisfied	3	3	1	5	2	2	5

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Winners

'Overall, how satisfied are you with your overall shopping experience with each of the following stores in the past 12 months? If you haven't visited that store in the last 12 months, just press 9. The first store is...'

[NF, PE, NS, NB, QC, ON, MB, SK, AB, BC ONLY]

Age / Gender

%	Total	18-34	35-44	45-54	55-64	65+	Male	Female
Sample	363	82	76	62	75	68	141	217
NET: Top2	81	84	88	80	78	63	75	84
NET: Btm2	19	16	12	20	22	37	25	16
Very Satisfied	38	35	51	32	47	31	31	43
Somewhat Satisfied	42	49	37	49	31	32	44	42
Somewhat Dissatisfied	14	12	9	10	14	34	14	14
Very Dissatisfied	5	4	3	10	8	3	11	2

Income

%	Total	<20K	20-40K	40-60K	60-80K	80-100K	100-250K	250K+
Sample	363	43	55	44	48	43	75	9
NET: Top2	81	89	77	78	80	92	83	42
NET: Btm2	19	11	23	22	20	8	17	58
Very Satisfied	38	47	23	50	43	45	38	36
Somewhat Satisfied	42	42	53	29	37	48	45	6
Somewhat Dissatisfied	14	5	12	19	17	0	15	31
Very Dissatisfied	5	7	11	3	2	8	2	28

Region

%	Total	ATL	PQ	ON	MB SK	AB	BC
Sample	363	43	130	36	42	51	61
NET: Top2	81	92	82	79	82	81	76
NET: Btm2	19	8	18	21	18	19	24
Very Satisfied	38	40	35	44	37	31	34
Somewhat Satisfied	42	52	47	35	45	50	42
Somewhat Dissatisfied	14	2	14	18	15	14	11
Very Dissatisfied	5	6	4	3	3	5	13

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Marshall's

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[ON, QC, NB, NS, AB, AK, MB, BC ONLY]

Age / Gender

%	Total	18-34	35-44	45-54	55-64	65+	Male	Female
Sample	117	33	25	20	18	21	51	64
NET: Top2	61	49	68	67	73	67	45	76
NET: Btm2	39	51	32	33	27	33	55	24
Very Satisfied	24	12	30	25	32	41	11	35
Somewhat Satisfied	38	37	38	43	41	26	34	41
Somewhat Dissatisfied	25	28	25	29	4	22	34	19
Very Dissatisfied	14	24	7	3	23	12	21	5

Income

%	Total	<20K	20-40K	40-60K	60-80K	80-100K	100-250K	250K+
Sample	117	15	22	12	15	10	25	5
NET: Top2	61	73	71	56	62	50	73	26
NET: Btm2	39	27	29	44	38	50	27	74
Very Satisfied	24	7	32	37	40	20	22	26
Somewhat Satisfied	38	66	39	19	23	29	51	0
Somewhat Dissatisfied	25	15	26	9	6	41	17	29
Very Dissatisfied	14	12	4	35	32	9	10	45

Region

%	Total	ATL	PQ	ON	MB SK	AB	BC
Sample	117	10	43	15	19	9	21
NET: Top2	61	61	77	55	84	61	47
NET: Btm2	39	39	23	45	16	39	53
Very Satisfied	24	7	35	23	29	19	17
Somewhat Satisfied	38	54	42	32	55	42	31
Somewhat Dissatisfied	25	26	10	38	11	11	14
Very Dissatisfied	14	14	12	7	5	28	38

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