

# NEWS RELEASE



**FORUM RESEARCH INC.**

## FOR IMMEDIATE RELEASE

### Home Hardware Leads in Customer Satisfaction For D.I.Y. Stores

#### Canadian Tire, Réno Dépot also in the hunt; Rona last

In a random sampling of public opinion taken by the Forum Poll™ among 1268 adult Canadians, Home Hardware (including their Home Building Centres brand) is seen to have the highest customer satisfaction among Canada's leading DIY, or home improvement stores, slightly ahead of Canadian Tire and Réno Dépot in Quebec.

Almost all Home Hardware customers are satisfied with the store (86%) and a majority are "very satisfied" (52%). Incidence of visiting this store is just less than half (44% of adult Canadians). This score is almost identical to two years ago, when Home Hardware also led the field (April 2014, satisfied - 86%, very satisfied - 53%).

Canadian Tire is visited by almost all Canadians (81%), and has a total satisfaction score of almost 9-in-10 (89%). Just fewer than a half are "very satisfied" (49%), and this is similar to their score in 2014 (50%).

Réno Dépot in Quebec is visited by just fewer than a tenth of Canadians (7%), and by about 3-in-10 Quebecers (29%). It receives an overall satisfaction score of more than 9-in-10 (92%), and high satisfaction is characteristic of just fewer than half (47%).

Home Depot (62% visited, satisfied - 89%, very satisfied - 45%) and Lowe's (24% visited, satisfied - 78%, very satisfied - 45%) round out the list, except for the last entry, Rona, which does significantly more poorly than other stores.

Rona (visited by close to half of Canadians (47%) scores just over 8-in-10 in total satisfaction (82%), and less than 4-in-10 in high satisfaction ("very satisfied" - 38%).

"Customer satisfaction in the DIY arena is very stable, and the store chains we track are showing the same results they did 2 years ago. While not a mile ahead of competitors, Home Hardware appears to be in a very solid first place" said Forum Research President, Dr. Lorne Bozinoff.

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#### TORONTO

July 12<sup>th</sup>, 2016

#### HIGHLIGHTS:

- Home Hardware (including their Home Building Centres brand) is seen to have the highest customer satisfaction among Canada's leading DIY, or home improvement stores
- Almost all Home Hardware customers are satisfied with the store (86%) and a majority are "very satisfied" (52%)
- Canadian Tire is visited by almost all Canadians (81%), and has a total satisfaction score of almost 9-in-10 (89%)
- Réno Dépot in Quebec is visited by just fewer than a tenth of Canadians (7%), and by about 3-in-10 Quebecers (29%)
- "Customer satisfaction in the DIY arena is very stable, and the store chains we track are showing the same results they did 2 years ago. While not a mile ahead of competitors, Home Hardware appears to be in a very solid first place" 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 1268 randomly selected Canadian adults. The poll was conducted on July 11<sup>th</sup>, 2016.

Results based on the total sample are considered accurate +/- 3%, 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](http://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](http://www.forumresearch.com/polls.asp)

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***2013-2016 Trend/Summary Table:***

%	July 2016 – Very Satisfied	July 2016 – Total Satisfied	July 2016 – Percent Visited	April 2014 – Very Satisfied	April 2014 – Total Satisfied	April 2014 – Percent Visited
Home Hardware	52	86	44	53	86	45
Canadian Tire	49	89	81	50	86	81
Reno Depot	47	92	7	46	92	11
Home Depot	45	89	62	46	84	63
Lowe's	45	78	24	41	75	22
Rona	38	82	47	39	82	47

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**Home Depot**

*'How satisfied are you with your overall shopping experience with each of the following stores in the past 12 months?'*

[All Respondents]

**Age / Gender**

%	Total	18-34	35-44	45-54	55-64	65+	Male	Female
Sample	764	102	121	144	198	199	388	365
NET: Top2	89	87	88	88	87	94	88	90
NET: Btm2	11	13	12	12	13	6	12	10
Very Satisfied	45	45	42	44	48	47	42	49
Somewhat Satisfied	44	43	46	45	40	47	46	42
Somewhat Dissatisfied	7	7	7	9	10	2	7	6
Very Dissatisfied	4	6	6	3	3	4	4	3

**Income**

%	Total	<20K	20-40K	40-60K	60-80K	80-100K	100-250K	250K+
Sample	764	46	99	117	97	95	137	25
NET: Top2	89	88	91	88	90	86	88	74
NET: Btm2	11	12	9	12	10	14	12	26
Very Satisfied	45	44	44	42	41	46	45	26
Somewhat Satisfied	44	44	47	47	49	40	43	47
Somewhat Dissatisfied	7	2	6	10	3	13	8	18
Very Dissatisfied	4	10	4	2	6	1	5	9

**Region**

%	Total	ATL	PQ	ON	MB SK	AB	BC
Sample	764	57	125	317	50	100	115
NET: Top2	89	94	89	87	93	92	88
NET: Btm2	11	6	11	13	7	8	12
Very Satisfied	45	39	46	46	32	39	51
Somewhat Satisfied	44	54	43	40	61	53	37
Somewhat Dissatisfied	7	2	6	7	7	8	9
Very Dissatisfied	4	4	5	6	0	0	3

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**Canadian Tire**

*'Overall, how satisfied are you with your overall shopping experience with each of the following stores in the past 12 months?'*

[All Respondents]

**Age / Gender**

%	Total	18-34	35-44	45-54	55-64	65+	Male	Female
Sample	1042	142	161	192	258	289	503	527
NET: Top2	89	94	84	83	90	92	87	91
NET: Btm2	11	6	16	17	10	8	13	9
Very Satisfied	49	50	48	47	50	49	45	53
Somewhat Satisfied	40	44	36	37	40	43	42	39
Somewhat Dissatisfied	8	4	9	11	8	6	9	6
Very Dissatisfied	4	1	7	5	2	2	4	2

**Income**

%	Total	<20K	20-40K	40-60K	60-80K	80-100K	100-250K	250K+
Sample	1042	80	150	166	131	125	162	26
NET: Top2	89	92	88	90	91	84	88	71
NET: Btm2	11	8	12	10	9	16	12	29
Very Satisfied	49	53	52	50	47	42	51	50
Somewhat Satisfied	40	39	36	40	44	42	37	21
Somewhat Dissatisfied	8	3	9	6	7	10	10	10
Very Dissatisfied	4	5	3	3	2	6	2	19

**Region**

%	Total	ATL	PQ	ON	MB SK	AB	BC
Sample	1042	98	255	376	65	104	144
NET: Top2	89	88	92	87	86	86	90
NET: Btm2	11	12	8	13	14	14	10
Very Satisfied	49	51	45	52	55	38	50
Somewhat Satisfied	40	37	47	35	30	49	40
Somewhat Dissatisfied	8	7	6	8	8	9	8
Very Dissatisfied	4	5	2	4	6	5	2

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**Home Hardware, including Home Building Centres**

*'Overall, how satisfied are you with your overall shopping experience with each of the following stores in the past 12 months?'*

**Age / Gender**

%	Total	18-34	35-44	45-54	55-64	65+	Male	Female
Sample	582	75	73	113	141	180	314	259
NET: Top2	86	80	77	86	93	95	86	86
NET: Btm2	14	20	23	14	7	5	14	14
Very Satisfied	52	45	44	50	57	68	48	59
Somewhat Satisfied	34	36	32	36	37	27	38	28
Somewhat Dissatisfied	8	12	11	10	5	3	9	7
Very Dissatisfied	6	8	12	4	2	2	5	6

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**Income**

%	Total	<20K	20-40K	40-60K	60-80K	80-100K	100-250K	250K+
Sample	582	40	77	97	74	80	89	19
NET: Top2	86	87	87	91	79	89	81	70
NET: Btm2	14	13	13	9	21	11	19	30
Very Satisfied	52	70	53	58	50	58	37	43
Somewhat Satisfied	34	17	35	33	29	31	44	27
Somewhat Dissatisfied	8	0	10	9	13	9	12	15
Very Dissatisfied	6	13	2	0	8	2	7	15

**Region**

%	Total	ATL	PQ	ON	MB SK	AB	BC
Sample	582	71	75	265	33	51	87
NET: Top2	86	86	76	86	90	98	86
NET: Btm2	14	14	24	14	10	2	14
Very Satisfied	52	49	37	55	53	51	61
Somewhat Satisfied	34	37	39	31	37	47	25
Somewhat Dissatisfied	8	9	9	10	6	2	8
Very Dissatisfied	6	5	15	4	4	0	6

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July 12<sup>th</sup>, 2016

**Lowe's**

'Overall, how satisfied are you with your overall shopping experience with each of the following stores in the past 12 months?'

**Age / Gender**

%	Total	18-34	35-44	45-54	55-64	65+	Male	Female
Sample	281	37	45	60	80	59	157	117
NET: Top2	78	79	73	72	88	85	75	84
NET: Btm2	22	21	27	28	12	15	25	16
Very Satisfied	45	49	38	40	51	46	42	50
Somewhat Satisfied	34	30	35	31	38	38	33	34
Somewhat Dissatisfied	16	19	20	20	9	9	20	12
Very Dissatisfied	5	2	7	8	3	6	5	4

**Income**

%	Total	<20K	20-40K	40-60K	60-80K	80-100K	100-250K	250K+
Sample	281	18	32	36	29	41	57	12
NET: Top2	78	62	84	91	80	90	74	43
NET: Btm2	22	38	16	9	20	10	26	57
Very Satisfied	45	37	64	49	43	46	43	18
Somewhat Satisfied	34	26	20	42	37	44	31	25
Somewhat Dissatisfied	16	9	16	9	20	4	22	23
Very Dissatisfied	5	28	0	0	0	5	4	34

**Region**

%	Total	ATL	PQ	ON	MB SK	AB	BC
Sample	281	5	17	181	14	46	18
NET: Top2	78	33	86	80	75	76	62
NET: Btm2	22	67	14	20	25	24	38
Very Satisfied	45	12	53	46	61	36	37
Somewhat Satisfied	34	21	33	35	14	40	26
Somewhat Dissatisfied	16	41	14	14	25	21	24
Very Dissatisfied	5	26	0	6	0	3	14

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**Rona**

*'Overall, how satisfied are you with your overall shopping experience with each of the following stores in the past 12 months?'*

**Age / Gender**

%	Total	18-34	35-44	45-54	55-64	65+	Male	Female
Sample	599	66	102	125	151	155	304	286
NET: Top2	82	78	80	83	81	92	80	86
NET: Btm2	18	22	20	17	19	8	20	14
Very Satisfied	38	34	31	39	41	47	31	45
Somewhat Satisfied	45	44	49	44	40	45	49	42
Somewhat Dissatisfied	12	16	13	10	15	5	13	9
Very Dissatisfied	6	6	7	7	4	3	7	5

**Income**

%	Total	<20K	20-40K	40-60K	60-80K	80-100K	100-250K	250K+
Sample	599	42	82	94	75	76	99	17
NET: Top2	82	83	86	83	90	85	76	67
NET: Btm2	18	17	14	17	10	15	24	33
Very Satisfied	38	52	43	43	44	27	29	23
Somewhat Satisfied	45	31	42	40	45	58	48	44
Somewhat Dissatisfied	12	5	13	13	9	10	12	19
Very Dissatisfied	6	13	2	4	1	4	12	13

**Region**

%	Total	ATL	PQ	ON	MB SK	AB	BC
Sample	599	25	202	170	40	74	88
NET: Top2	82	83	90	72	94	78	83
NET: Btm2	18	17	10	28	6	22	17
Very Satisfied	38	35	44	32	38	36	38
Somewhat Satisfied	45	48	47	40	56	43	45
Somewhat Dissatisfied	12	6	6	16	3	21	13
Very Dissatisfied	6	11	3	11	3	1	4

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**TORONTO**

**July 12<sup>th</sup>, 2016**

**Réno Dépot**

*'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 Only]

**Age / Gender**

%	Total	18-34	35-44	45-54	55-64	65+	Male	Female
Sample	82	15	9	16	22	20	34	47
NET: Top2	92	85	100	100	87	96	97	88
NET: Btm2	8	15	0	0	13	4	3	12
Very Satisfied	47	57	22	44	41	50	40	50
Somewhat Satisfied	45	29	78	56	45	46	57	39
Somewhat Dissatisfied	2	0	0	0	8	4	2	2
Very Dissatisfied	7	15	0	0	5	0	2	10

**Income**

%	Total	<20K	20-40K	40-60K	60-80K	80-100K	100-250K	250K+
Sample	82	7	15	11	15	9	9	2
NET: Top2	92	100	100	94	96	100	63	100
NET: Btm2	8	0	0	6	4	0	37	0
Very Satisfied	47	81	24	55	36	48	48	0
Somewhat Satisfied	45	19	76	40	59	52	15	100
Somewhat Dissatisfied	2	0	0	6	4	0	0	0
Very Dissatisfied	7	0	0	0	0	0	37	0

**Region**

%	Total	ATL	PQ	ON	MB SK	AB	BC
Sample	82	0	82	0	0	0	0
NET: Top2	92	0	92	0	0	0	0
NET: Btm2	8	0	8	0	0	0	0
Very Satisfied	47	0	47	0	0	0	0
Somewhat Satisfied	45	0	45	0	0	0	0
Somewhat Dissatisfied	2	0	2	0	0	0	0
Very Dissatisfied	7	0	7	0	0	0	0

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## TORONTO

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### Percent Visited Summary

#### Age

%	Total	18-34	35-44	45-54	55-64	65+	Male	Female
Sample	1268	176	184	224	310	374	599	649
Home Depot	62	59	67	65	65	53	65	59
Canadian Tire	81	76	87	86	83	77	83	81
Home Hardware, including Home Building Centers	44	39	40	51	47	48	50	39
Lowe's	24	21	26	28	27	16	27	20
Rona	47	37	56	56	49	41	48	46
Réno Dépot	7	10	5	7	7	5	6	8

#### Income

%	Total	<20K	20-40K	40-60K	60-80K	80-100K	100-250K	250K+
Sample	1268	125	198	192	147	148	182	29
Home Depot	62	43	51	63	66	68	78	80
Canadian Tire	81	62	70	87	90	85	90	90
Home Hardware, including Home Building Centers	44	34	34	45	51	49	49	66
Lowe's	24	14	21	21	18	28	34	39
Rona	47	37	40	50	49	49	56	52
Réno Dépot	7	12	6	5	9	8	7	7

#### Region

%	Total	ATL	PQ	ON	MB SK	AB	BC
Sample	1268	118	306	449	86	132	177
Home Depot	62	50	43	70	54	79	68
Canadian Tire	81	82	83	81	74	81	83
Home Hardware, including Home Building Centers	44	60	27	54	41	37	46
Lowe's	24	4	7	41	18	36	9
Rona	47	19	65	37	46	59	50
Réno Dépot	7	0	29	0	0	0	0

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