

NEWS RELEASE



FOR IMMEDIATE RELEASE

Costco is still tops in customer satisfaction

Target continues to slide, Hudson's Bay, Sears down

TORONTO MAY 16th, 2014 - In a random sampling of public opinion among 972 Canadians 18 years and older, Costco had the highest score for customer satisfaction by far, with two thirds (63%) "very satisfied". The nearest competitor on this overall satisfaction measure among Canadian retailers, department stores and Big Box stores, is Walmart (37% very satisfied), followed by Holt Renfrew (35%) and Hudson's Bay (33%). At the bottom of the scale is Target (18% very satisfied). Target has seen its score decline ever since it launched in Canada (April, 2013 - 32%, August, 2013 - 27%, May, 2014 - 18%). Costco, in the meantime, has maintained its extraordinarily high customer satisfaction rating since we began tracking (April 2013 - 62%, August, 2013 - 62%, May, 2014 - 63%). Hudson's Bay has seen its score decline slightly (from 40% in August), as has Sears (34% very satisfied in August, 29% now). Walmart has basically maintained its position in this ranking across the three waves of interviewing (April - 39%, August 40%, May - 37%).

Walmart most widely used

Eight-in-ten Canadians shop at Walmart (81%), followed by close to 6-in-10 who shop at Sears (59%) or Costco (58%). Stores shopped by fewer than half of Canadians include Target (48%), Hudson's Bay and Winners (45% each). Very few shop at Marshall's (9%), Holt Renfrew (8%) or Ogilvy (2%).

"Virtually no one who shops at Costco is unhappy with the store, which is a remarkable testament to the attention they bring to delighting their patrons. Target, on the other hand, entered the market with a bang, but has been unable to sustain a satisfactory relationship with shoppers," said Forum Research President, Dr. Lorne Bozinoff.

Lorne Bozinoff, Ph.D. is the president and founder of Forum Research. He can be reached at lbozinoff@forumresearch.com or at (416) 960-9603.

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TORONTO

May 16th, 2014

HIGHLIGHTS:

- Costco had the highest score for customer satisfaction by far, with two thirds (63%) "very satisfied".
- Eight-in-ten Canadians shop at Walmart (81%), followed by close to 6-in-10 who shop at Sears (59%) or Costco (58%).
- "Virtually no one who shops at Costco is unhappy with the store, which is a remarkable testament to the attention they bring to delighting their patrons. Target, on the other hand, entered the market with a bang, but has been unable to sustain a satisfactory relationship with shoppers," 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 972 randomly selected Canadian residents 18 years of age and older. The poll was conducted on May 14-15th, 2014.

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

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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Overall Satisfaction – Trending

%	May 14-15th, 2014 (n = 972)	August 15th, 2013 (n = 1578)	April 18th, 2013
Costco	63	62	62
Ogilvy*	52	59	37
Wal-mart	37	40	39
Holt Renfrew	35	32	32
Hudson's Bay	33	40	35
Winners	31	35	31
Sears	29	34	36
Marshall's	26	35	24
Target	18	27	32

* Caution: Small Base Size

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Overall Satisfaction: 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.'

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

Age / Gender

%	Total	18-34	35-44	45-54	55-64	65+	Male	Female
Sample	438	34	59	67	126	152	180	258
NET: Top2	77	58	71	90	88	90	74	80
NET: Btm2	23	42	29	10	12	10	26	20
Very Satisfied	33	29	21	31	45	46	34	32
Somewhat Satisfied	44	29	50	59	43	44	40	47
Somewhat Dissatisfied	14	24	13	8	12	8	19	10
Very Dissatisfied	9	18	16	2	0	1	7	11

Household Income

%	Total	<\$20K	\$20-\$40K	\$40-\$60K	\$60-\$80K	\$80-\$100K	\$100-\$250K	\$250K+
Sample	438	19	66	65	66	48	78	13
NET: Top2	77	70	74	73	88	63	78	96
NET: Btm2	23	30	26	27	12	37	22	4
Very Satisfied	33	9	42	31	32	19	37	40
Somewhat Satisfied	44	61	32	42	56	44	41	56
Somewhat Dissatisfied	14	3	17	18	9	21	15	0
Very Dissatisfied	9	27	9	10	3	16	7	4

Region

%	Total	ATL	PQ	ON	MB SK	AB	BC
Sample	438	14	66	207	32	58	61
NET: Top2	77	71	78	75	75	80	80
NET: Btm2	23	29	22	25	25	20	20
Very Satisfied	33	34	43	29	36	25	36
Somewhat Satisfied	44	36	35	46	39	54	45
Somewhat Dissatisfied	14	29	16	16	25	6	6
Very Dissatisfied	9	0	7	9	0	14	14

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Overall Satisfaction: 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.'

[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	584	49	74	97	157	207	231	353
NET: Top2	71	52	69	83	82	80	67	74
NET: Btm2	29	48	31	17	18	20	33	26
Very Satisfied	29	23	23	24	40	41	24	32
Somewhat Satisfied	42	29	46	59	42	39	42	41
Somewhat Dissatisfied	20	32	19	11	14	17	18	21
Very Dissatisfied	9	17	12	5	4	3	15	5

Household Income

%	Total	<\$20K	\$20-\$40K	\$40-\$60K	\$60-\$80K	\$80-\$100K	\$100-\$250K	\$250K+
Sample	584	41	108	95	82	59	85	15
NET: Top2	71	63	71	89	71	77	58	35
NET: Btm2	29	37	29	11	29	23	42	65
Very Satisfied	29	29	36	42	26	19	23	20
Somewhat Satisfied	42	34	35	46	45	58	34	16
Somewhat Dissatisfied	20	36	15	10	24	18	21	45
Very Dissatisfied	9	1	14	1	5	5	21	19

Region

%	Total	ATL	PQ	ON	MB SK	AB	BC
Sample	584	67	102	254	43	66	52
NET: Top2	71	72	64	74	79	64	73
NET: Btm2	29	28	36	26	21	36	27
Very Satisfied	29	33	27	24	33	41	33
Somewhat Satisfied	42	39	38	49	46	23	40
Somewhat Dissatisfied	20	19	24	19	18	21	17
Very Dissatisfied	9	9	12	8	3	14	10

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Overall Satisfaction: 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 Holt Renfrew’

[QC, ON, AB, BC ONLY]

Age / Gender

%	Total	18-34	35-44	45-54	55-64	65+	Male	Female
Sample	62	9	17	5	18	13	26	36
NET: Top2	56	46	53	66	78	73	62	48
NET: Btm2	44	54	47	34	22	27	38	52
Very Satisfied	35	46	25	18	42	34	49	20
Somewhat Satisfied	21	0	29	48	36	39	14	29
Somewhat Dissatisfied	27	28	29	34	17	18	20	35
Very Dissatisfied	18	26	18	0	5	9	18	17

Household Income

%	Total	<\$20K	\$20-\$40K	\$40-\$60K	\$60-\$80K	\$80-\$100K	\$100-\$250K	\$250K+
Sample	62	3	6	5	7	5	17	9
NET: Top2	56	8	25	41	100	79	75	28
NET: Btm2	44	92	75	59	0	21	25	72
Very Satisfied	35	8	0	41	59	57	57	0
Somewhat Satisfied	21	0	25	0	41	22	18	28
Somewhat Dissatisfied	27	24	75	59	0	21	16	37
Very Dissatisfied	18	68	0	0	0	0	9	35

Region

%	Total	ATL	PQ	ON	MB SK	AB	BC
Sample	62	0	8	35	0	8	11
NET: Top2	56	0	75	49	0	44	63
NET: Btm2	44	0	25	51	0	56	37
Very Satisfied	35	0	51	26	0	15	55
Somewhat Satisfied	21	0	24	23	0	29	8
Somewhat Dissatisfied	27	0	25	36	0	7	20
Very Dissatisfied	18	0	0	15	0	49	17

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Overall Satisfaction: 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.’

[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	763	72	102	142	191	256	325	438
NET: Top2	81	78	77	82	83	86	80	81
NET: Btm2	19	22	23	18	17	14	20	19
Very Satisfied	37	35	35	39	39	39	38	36
Somewhat Satisfied	44	43	42	43	44	47	43	45
Somewhat Dissatisfied	11	12	6	13	15	9	10	11
Very Dissatisfied	9	10	17	5	2	5	9	8

Household Income

%	Total	<\$20K	\$20-\$40K	\$40-\$60K	\$60-\$80K	\$80-\$100K	\$100-\$250K	\$250K+
Sample	763	69	130	135	97	66	120	19
NET: Top2	81	84	77	90	82	70	82	60
NET: Btm2	19	16	23	10	18	30	18	40
Very Satisfied	37	38	49	38	35	21	37	30
Somewhat Satisfied	44	46	27	52	47	49	45	30
Somewhat Dissatisfied	11	5	12	6	13	18	6	25
Very Dissatisfied	9	11	11	3	5	12	12	15

Region

%	Total	ATL	PQ	ON	MB SK	AB	BC
Sample	763	82	119	329	66	94	73
NET: Top2	81	86	88	78	83	75	73
NET: Btm2	19	14	12	22	17	25	27
Very Satisfied	37	58	39	34	36	34	29
Somewhat Satisfied	44	28	49	44	47	41	43
Somewhat Dissatisfied	11	9	6	13	8	13	12
Very Dissatisfied	9	5	5	9	9	12	15

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Overall Satisfaction: Costco

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[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	541	53	76	91	154	167	237	304
NET: Top2	92	86	92	94	97	95	92	91
NET: Btm2	8	14	8	6	3	5	8	9
Very Satisfied	63	53	66	70	62	69	62	63
Somewhat Satisfied	29	33	26	24	34	26	30	28
Somewhat Dissatisfied	5	6	7	6	2	4	5	5
Very Dissatisfied	3	8	1	0	1	2	3	3

Household Income

%	Total	<\$20K	\$20-\$40K	\$40-\$60K	\$60-\$80K	\$80-\$100K	\$100-\$250K	\$250K+
Sample	541	32	81	94	68	52	106	15
NET: Top2	92	90	89	92	88	84	95	97
NET: Btm2	8	10	11	8	12	16	5	3
Very Satisfied	63	54	64	58	69	59	65	66
Somewhat Satisfied	29	36	25	34	19	25	30	31
Somewhat Dissatisfied	5	0	7	8	6	11	5	0
Very Dissatisfied	3	10	4	1	6	5	0	3

Region

%	Total	ATL	PQ	ON	MB SK	AB	BC
Sample	541	55	92	218	50	68	58
NET: Top2	92	88	99	91	94	86	86
NET: Btm2	8	12	1	9	6	14	14
Very Satisfied	63	59	69	65	58	61	53
Somewhat Satisfied	29	29	30	27	35	24	34
Somewhat Dissatisfied	5	2	0	6	6	10	8
Very Dissatisfied	3	10	1	2	0	4	6

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Overall Satisfaction: Target

‘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.’

[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	406	50	66	73	107	110	172	234
NET: Top2	52	44	52	64	58	51	53	52
NET: Btm2	48	56	48	36	42	49	47	48
Very Satisfied	18	23	11	20	15	17	20	15
Somewhat Satisfied	34	21	42	45	43	34	33	36
Somewhat Dissatisfied	29	35	29	23	22	29	30	28
Very Dissatisfied	19	21	19	13	20	20	17	20

Household Income

%	Total	<\$20K	\$20-\$40K	\$40-\$60K	\$60-\$80K	\$80-\$100K	\$100-\$250K	\$250K+
Sample	406	26	66	68	56	40	76	9
NET: Top2	52	40	50	54	47	58	53	83
NET: Btm2	48	60	50	46	53	42	47	17
Very Satisfied	18	18	18	16	10	17	18	41
Somewhat Satisfied	34	22	31	38	37	41	35	42
Somewhat Dissatisfied	29	38	28	28	33	28	31	0
Very Dissatisfied	19	22	22	18	20	14	16	17

Region

%	Total	ATL	PQ	ON	MB SK	AB	BC
Sample	406	42	63	180	33	46	42
NET: Top2	52	54	60	51	46	58	38
NET: Btm2	48	46	40	49	54	42	62
Very Satisfied	18	20	25	17	18	13	7
Somewhat Satisfied	34	35	35	34	28	46	31
Somewhat Dissatisfied	29	23	28	30	38	15	39
Very Dissatisfied	19	23	12	19	16	26	23

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Overall Satisfaction: 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.’

[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	398	44	64	79	103	108	130	268
NET: Top2	79	75	80	80	82	84	78	80
NET: Btm2	21	25	20	20	18	16	22	20
Very Satisfied	31	24	34	33	40	32	30	32
Somewhat Satisfied	48	50	46	47	43	52	48	48
Somewhat Dissatisfied	15	17	14	16	14	12	19	13
Very Dissatisfied	6	8	6	4	4	4	3	7

Household Income

%	Total	<\$20K	\$20-\$40K	\$40-\$60K	\$60-\$80K	\$80-\$100K	\$100-\$250K	\$250K+
Sample	398	25	59	63	58	44	84	8
NET: Top2	79	75	87	83	79	87	75	58
NET: Btm2	21	25	13	17	21	13	25	42
Very Satisfied	31	21	38	29	35	34	27	49
Somewhat Satisfied	48	54	49	54	44	53	48	9
Somewhat Dissatisfied	15	9	6	13	13	13	23	38
Very Dissatisfied	6	17	7	5	9	0	2	4

Region

%	Total	ATL	PQ	ON	MB SK	AB	BC
Sample	398	42	67	179	28	44	38
NET: Top2	79	87	83	74	80	84	78
NET: Btm2	21	13	17	26	20	16	22
Very Satisfied	31	40	30	32	36	29	20
Somewhat Satisfied	48	47	53	42	44	54	58
Somewhat Dissatisfied	15	7	13	17	20	12	19
Very Dissatisfied	6	6	3	9	0	4	3

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Overall Satisfaction: Marshall's

'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.'

[ON, MB, BC ONLY]

Age / Gender

%	Total	18-34	35-44	45-54	55-64	65+	Male	Female
Sample	74	5	19	14	17	19	27	47
NET: Top2	71	47	87	65	68	65	79	66
NET: Btm2	29	53	13	35	32	35	21	34
Very Satisfied	26	24	30	19	20	28	26	25
Somewhat Satisfied	45	23	57	46	48	37	52	40
Somewhat Dissatisfied	18	26	5	30	18	28	19	18
Very Dissatisfied	11	26	8	5	14	7	2	17

Household Income

%	Total	<\$20K	\$20-\$40K	\$40-\$60K	\$60-\$80K	\$80-\$100K	\$100-\$250K	\$250K+
Sample	74	3	7	9	11	8	22	3
NET: Top2	71	32	50	92	76	52	81	83
NET: Btm2	29	68	50	8	24	48	19	17
Very Satisfied	26	8	11	60	32	28	15	83
Somewhat Satisfied	45	24	39	32	43	24	66	0
Somewhat Dissatisfied	18	0	19	8	24	48	14	0
Very Dissatisfied	11	68	31	0	0	0	5	17

Region

%	Total	ATL	PQ	ON	MB SK	AB	BC
Sample	74	0	0	56	5	0	13
NET: Top2	71	0	0	75	74	0	50
NET: Btm2	29	0	0	25	26	0	50
Very Satisfied	26	0	0	28	35	0	9
Somewhat Satisfied	45	0	0	46	39	0	41
Somewhat Dissatisfied	18	0	0	16	26	0	22
Very Dissatisfied	11	0	0	9	0	0	27

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Overall Satisfaction: Ogilvy

‘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.’

[QC ONLY]

Age / Gender

%	Total	18-34	35-44	45-54	55-64	65+	Male	Female
Sample	13	2	2	2	4	3	4	9
NET: Top2	77	100	50	100	52	67	90	70
NET: Btm2	23	0	50	0	48	33	10	30
Very Satisfied	52	100	0	50	52	0	81	36
Somewhat Satisfied	26	0	50	50	0	67	10	34
Somewhat Dissatisfied	23	0	50	0	48	33	10	30
Very Dissatisfied	0	0	0	0	0	0	0	0

Household Income

%	Total	<\$20K	\$20-\$40K	\$40-\$60K	\$60-\$80K	\$80-\$100K	\$100-\$250K	\$250K+
Sample	13	1	4	4	0	1	1	1
NET: Top2	77	100	90	52	0	100	0	100
NET: Btm2	23	0	10	48	0	0	100	0
Very Satisfied	52	0	81	42	0	100	0	0
Somewhat Satisfied	26	100	10	10	0	0	0	100
Somewhat Dissatisfied	23	0	10	48	0	0	100	0
Very Dissatisfied	0	0	0	0	0	0	0	0

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Department Stores Used (%)

Age / Gender

%	Total	18-34	35-44	45-54	55-64	65+	Male	Female
Sample	972	87	111	167	265	342	418	554
Hudson's Bay	45	42	53	39	47	46	45	45
Sears	59	59	66	55	57	61	57	62
Holt Renfrew	8	11	16	2	7	4	9	8
Wal-mart	81	81	92	83	71	74	80	82
Costco	58	60	68	55	57	48	58	58
Target	48	57	59	44	39	32	47	48
Winners	45	49	58	43	38	32	36	53
Marshall's	9	6	17	9	6	6	7	10
Ogilvy	2	3	2	1	2	1	1	2

Household Income

%	Total	<\$20K	\$20-\$40K	\$40-\$60K	\$60-\$80K	\$80-\$100K	\$100-\$250K	\$250K+
Sample	972	94	167	162	121	81	154	22
Hudson's Bay	45	27	43	40	51	62	47	50
Sears	59	45	66	53	72	73	53	64
Holt Renfrew	8	6	6	3	5	5	14	49
Wal-mart	81	79	79	82	85	87	84	79
Costco	58	42	56	56	59	69	69	67
Target	48	39	49	45	50	61	55	50
Winners	45	34	42	41	45	65	58	47
Marshall's	9	6	6	5	12	13	14	12
Ogilvy	2	1	4	4	0	1	0	7

Region

%	Total	ATL	PQ	ON	MB SK	AB	BC
Sample	972	93	162	412	80	111	114
Hudson's Bay	45	8	41	51	42	58	45
Sears	59	66	59	63	57	59	48
Holt Renfrew	8	0	6	10	0	11	13
Wal-mart	81	93	80	85	74	91	62
Costco	58	65	57	57	63	72	46
Target	48	54	46	52	47	44	38
Winners	45	52	47	48	40	44	31
Marshall's	9	0	0	17	8	0	11
Ogilvy	2	0	8	0	0	0	0

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NEWS RELEASE



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