

demographics

scarborough research oct 04–sept 05



grocery shopping & dining out

Richmond Times-Dispatch

TimesDispatch.com

richmond, virginia



GROCERY SALES SHARE OF RICHMOND AREA MARKET*

	number of stores	estimated total sales (in millions)	market share
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TOP SUPERMARKETS

Ukrop's	27	\$579.3	40.2%
Food Lion	47	\$504.1	35.0
Kroger	15	\$246.1	17.1

TOP 10 RETAILERS SELLING GROCERIES

Ukrop's	27	\$579.3	22.4%
Food Lion	47	\$504.1	19.5
Wal-Mart	9	\$309.4	12.0
Kroger	15	\$245.1	9.5
CVS	44	\$146.5	5.7
Target	10	\$111.2	4.3
7-Eleven	92	\$104.9	4.1
Sam's Club	3	\$83.9	3.3
Walgreen's	16	\$64.5	2.5
Costco	2	\$58.1	2.3

*Richmond-Petersburg MSA data from Food World.
Source: Richmond Times-Dispatch, June 22, 2005.
Food World estimated sales from March 2004-March 2005.

GROCERY STORE CROSS-SHOPPING IN PAST 7 DAYS

	Food Lion	Ukrop's	Wal-Mart	Kroger
	534,100	484,000	450,400	\$309,000
Food Lion	100%	61%*	69%	60%
Ukrop's	55	100	58	65
Wal-Mart	59	54	100	51
Kroger	35	42	35	100

*Sixty-one percent of Ukrop's 484,000 past-7-day shoppers also shopped at Food Lion.

HOUSEHOLD SPENDING ON GROCERIES PAST 7 DAYS

	all households	456,800	100%
Less than \$100	214,700		47*
\$100-\$199	191,000		42
\$200 or more	38,800		9

*Forty-seven percent of households spent less than \$100 on groceries in the past-7-days.

grocery shopping and dining out

Grocery store shoppers get their coupons from the newspaper:

57% of Food Lion shoppers,

58% of Wal-Mart shoppers,

62% of both Kroger and Ukrop's shoppers get their coupons from the daily or Sunday newspaper.

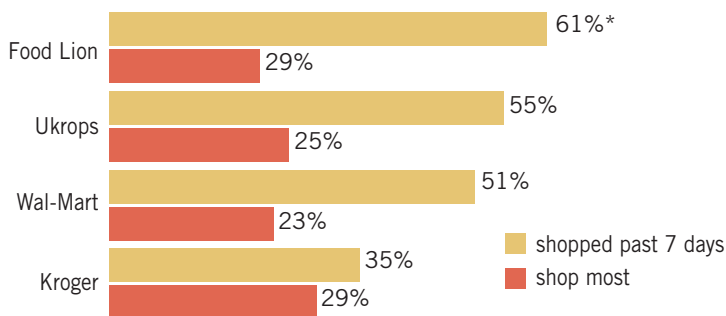
398,600 adults ate at a sit-down restaurant in the past 7 days:

74% of them read The Times-Dispatch in the past 7 days.

600,300 adults ate at a fast food restaurant in the past 7 days:

70% of them read The Times-Dispatch in the past 7 days.

GROCERY STORES SHOPPED IN PAST 7 DAYS AND SHOP MOST



*Sixty-one percent of all adults shopped at Food Lion in the past 7 days and 29% of adults do most of their shopping there.

GROCERY COUPON FREQUENCY OF USE

all households	456,800
More than once a week	10%*
Once a week	17
2 or 3 times a month	21
Once a month	11
Less than once a month	14
Never	28

*Ten percent of households use grocery coupons more than once a week.

increase your reach

The #1 local media Web site in Richmond is www.TimesDispatch.com. A print/online combo using a display ad and an online ad will reach more potential customers than ever before. Add an online component to your media buy.

541,500
Net Daily/Sunday Times-Dispatch

153,900
TimesDispatch.com past 30 days

585,400
Net unduplicated audience

HOW HOUSEHOLD USUALLY GETS CENTS-OFF COUPONS

all households	456,800
Sunday newspaper	51%*
Preferred customer card	30
Mail	28
In-store coupons	23
Product packages	13
In-store circulars	12
Magazines	11
Weekday newspaper	10
Internet	6
Other source	5
Never use coupons	24

*Fifty-one percent of households usually get cents-off coupons from the Sunday newspaper.

All information in this report is from Scarborough Research, 2005, release 2 unless otherwise indicated.

The Richmond CBSA consists of the cities of Richmond, Colonial Heights, Hopewell, Petersburg and the counties of Amelia, Caroline, Charles City, Chesterfield, Cumberland, Dinwiddie, Goochland, Hanover, Henrico, King and Queen, King William, Louisa, New Kent, Powhatan, Prince George, Sussex.

Richmond-Petersburg VA MSA: cities of Richmond, Colonial Heights, Hopewell and Petersburg; counties of Charles City, Chesterfield, Dinwiddie, Goochland, Hanover, Henrico, New Kent, Powhatan, Prince George.

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GROCERY STORE SHOPPERS READ THE TIMES-DISPATCH

	shopped	read daily TD	read Sunday TD	read past 7 days
Food Lion	534,100	39%	56%	66%*
Ukrop's	484,000	48	67	77
Wal-Mart	450,400	39	57	70
Kroger	309,000	48	63	77

*Sixty-six percent of Food Lion's past-7-day shoppers read The Times-Dispatch in the past 7 days.

CONVENIENCE STORES

	shopped past 7 days	percent all adults	shop most	percent all adults
7-Eleven	270,900	31%*	158,900	18%
Wawa	159,900	18	104,200	12
Sheetz	130,300	15	72,700	8
Fas Mart	77,400	9	33,300	4♦
Rennie's	26,500	3	8,400	1
Other gas station				
food mart	129,800	15	71,600	8
Other convenience stores	103,900	12	69,800	8
None	352,700	40		

*Thirty-one percent of all adults shopped at 7-Eleven in the past 7 days.

♦Numbers below 35,000 have low bases; results should be interpreted with caution.

ATE AT RESTAURANT PAST 30 DAYS

all adults 878,100

	fast food	sit-down
1 time	7%*	14%
2 or 3 times	16	31
4 or 5 times	25	21
6 or more times	47	19

*Seven percent of adults ate at a fast-food restaurant once in the past 30 days.

ATE AT SIT-DOWN RESTAURANT

all adults
past 30 days
878,100

Applebee's	26%*
Ruby Tuesday	14
Red Lobster	14
Shoney's	13
O'Charley's	12
Outback Steakhouse	12
Golden Corral	12
Olive Garden	10
TGI Friday's	8
Lonestar Steakhouse	7
Chili's	5
Other	60
None	15

*Twenty-six percent of adults ate at Applebee's in the past 30 days.
Any restaurant with less than 5% is grouped with "other."

ATE AT FAST-FOOD RESTAURANT

all adults	past 30 days 878,100	past 7 days 878,100
McDonald's	54%*	26%
Wendy's	37	15
Arby's	36	13
Subway	34	14
Burger King	34	14
KFC	29	8
Hardee's	26	11
Chick-fil-A	25	8
Taco Bell	23	10
Pizza Hut	21	6
Captain D's	19	7
Papa John's Pizza	15	5
Dairy Queen	13	5
Starbucks	12	6
Panera Bread	12	3
Domino's Pizza	11	4
Other	40	17
None	5	32

*Fifty-four percent of adults ate at McDonald's in the past 30 days.
Note: Eating at fast-food or sit-down restaurant includes eating in, take-out and home delivery.
Any restaurant with less than 10% is included in "other."

TYPE OF RESTAURANT VISITED

all adults 878,100	past 30 days	past 7 days
Chinese	44%*	18%
Italian	24	9
Mexican	23	7
Seafood	19	5
Steakhouse	16	4
Any upscale	12	4
Coffee house/coffee bar	10	5
Other Asian	8	3

*Forty-four percent of adults ate at a Chinese restaurant in the past 30 days.

For information on beverages in the Richmond CBSA, go to www.reachvirginia.com/rtdmediakit/markmat_scarborough.html

Richmond Times-Dispatch

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