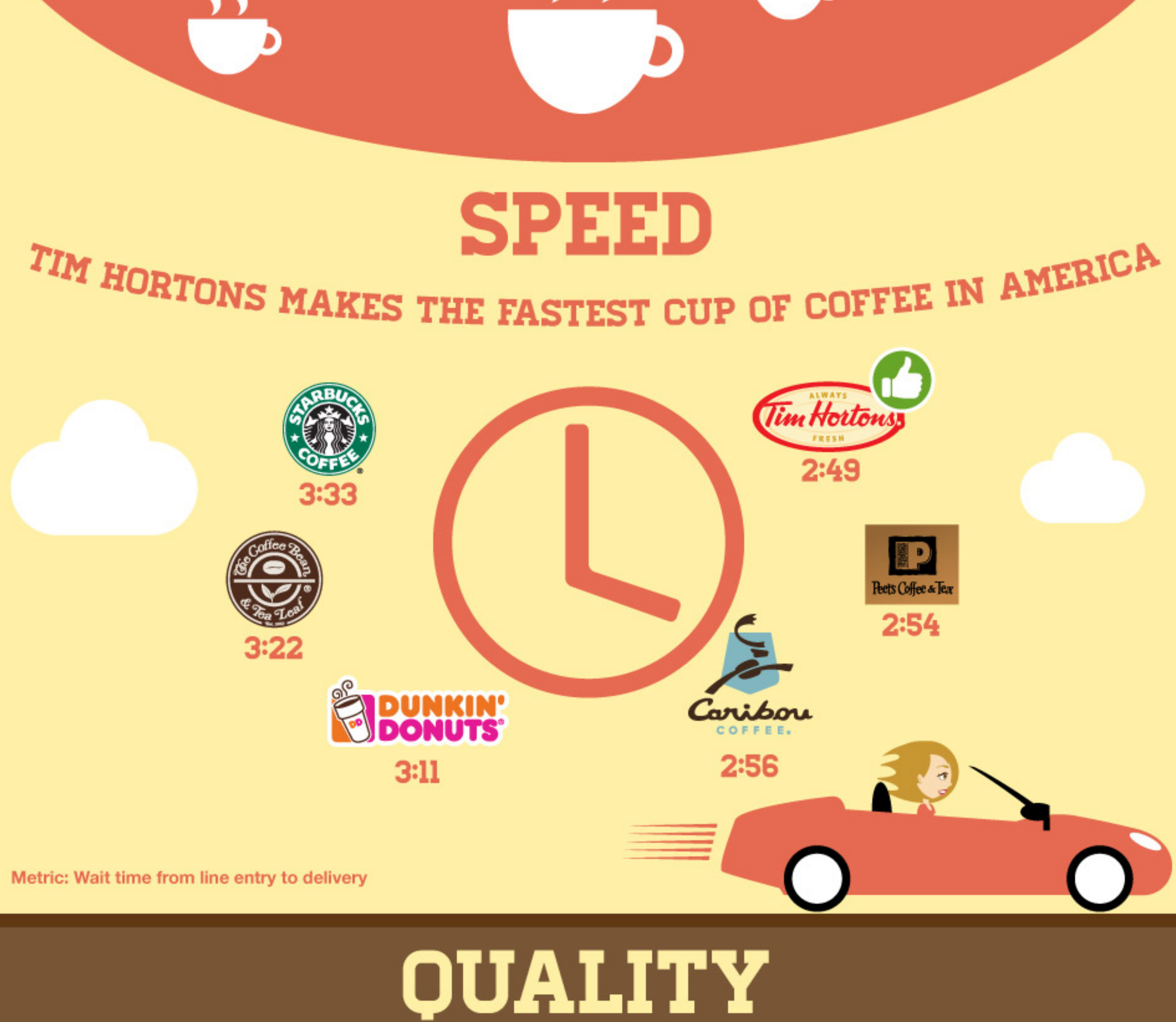




IN LATE 2014, PRESTO MOBILE SURVEYS (A PROVIDER OF MOBILE MARKET RESEARCH TOOLS) CONDUCTED A NATIONWIDE STUDY ON THE TOP COFFEE CHAINS IN AMERICA

BATTLE OF THE COFFEE CHAIN: WHO'S THE COFFEE KING OF AMERICA?

1000 Cups of Coffee



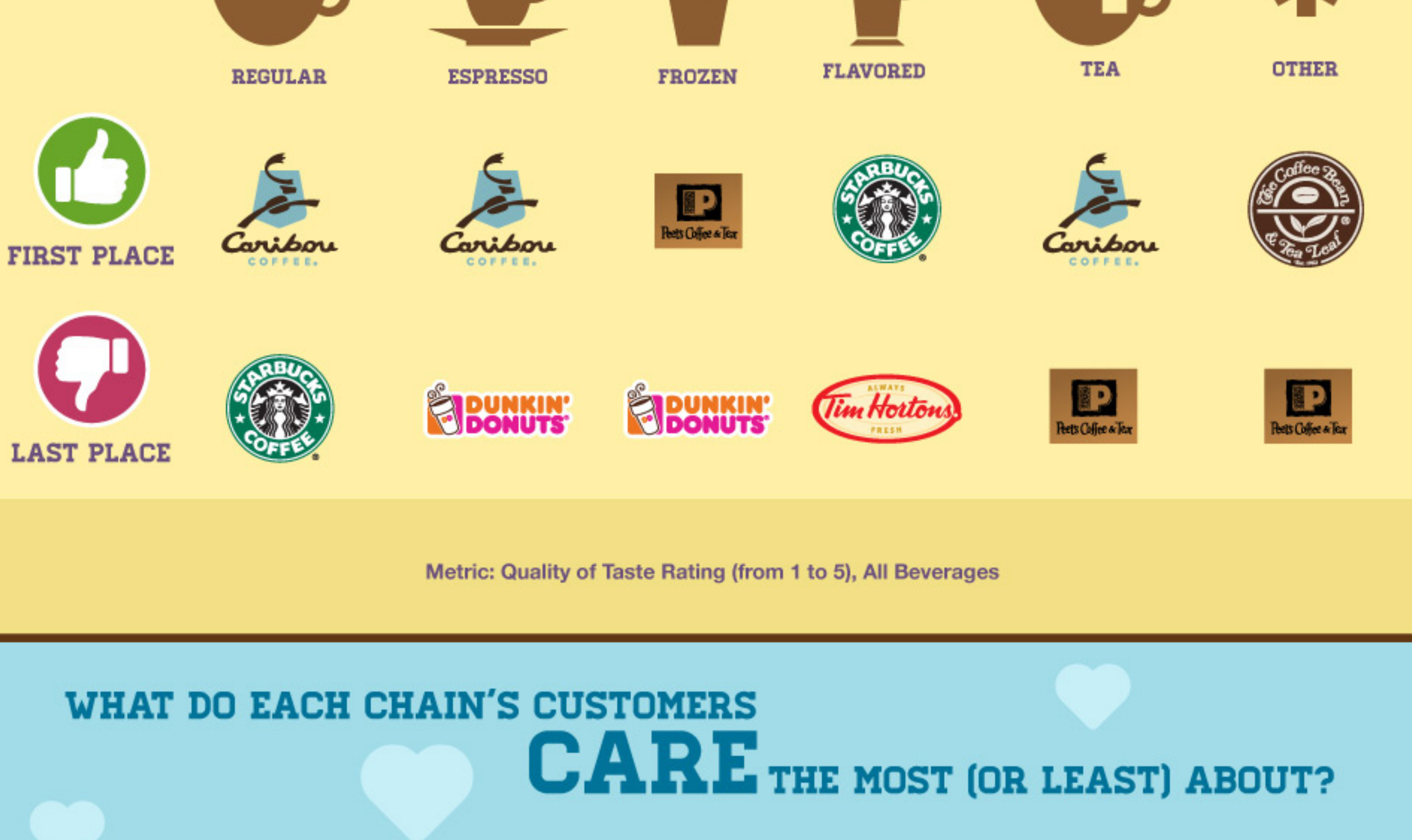
QUALITY

CARIBOU TAKES THE TITLE



INDIVIDUAL QUALITY

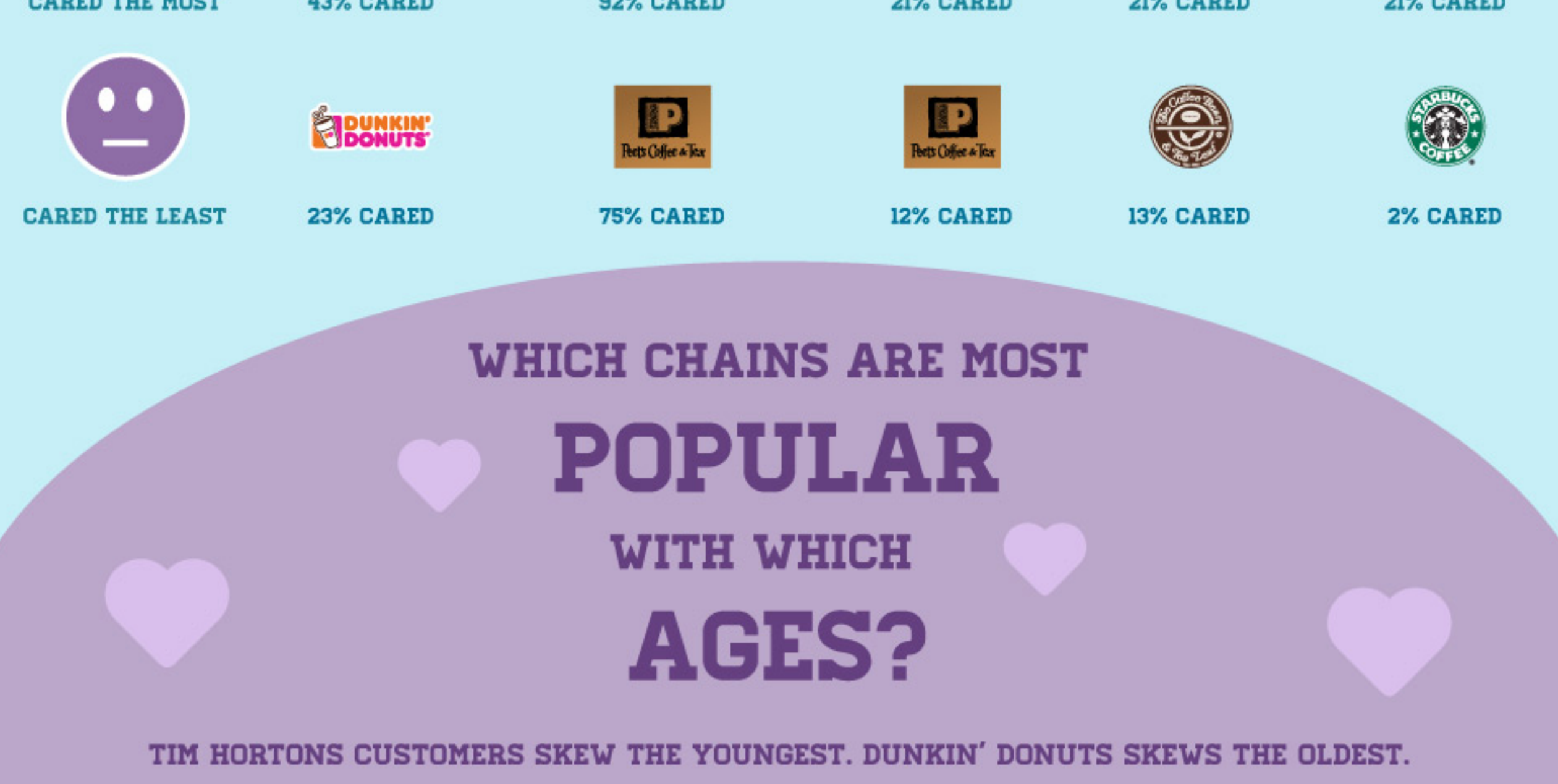
WHO MAKES THE BEST & WHO MAKES THE WORST



WHAT DO EACH CHAIN'S CUSTOMERS CARE THE MOST (OR LEAST) ABOUT?

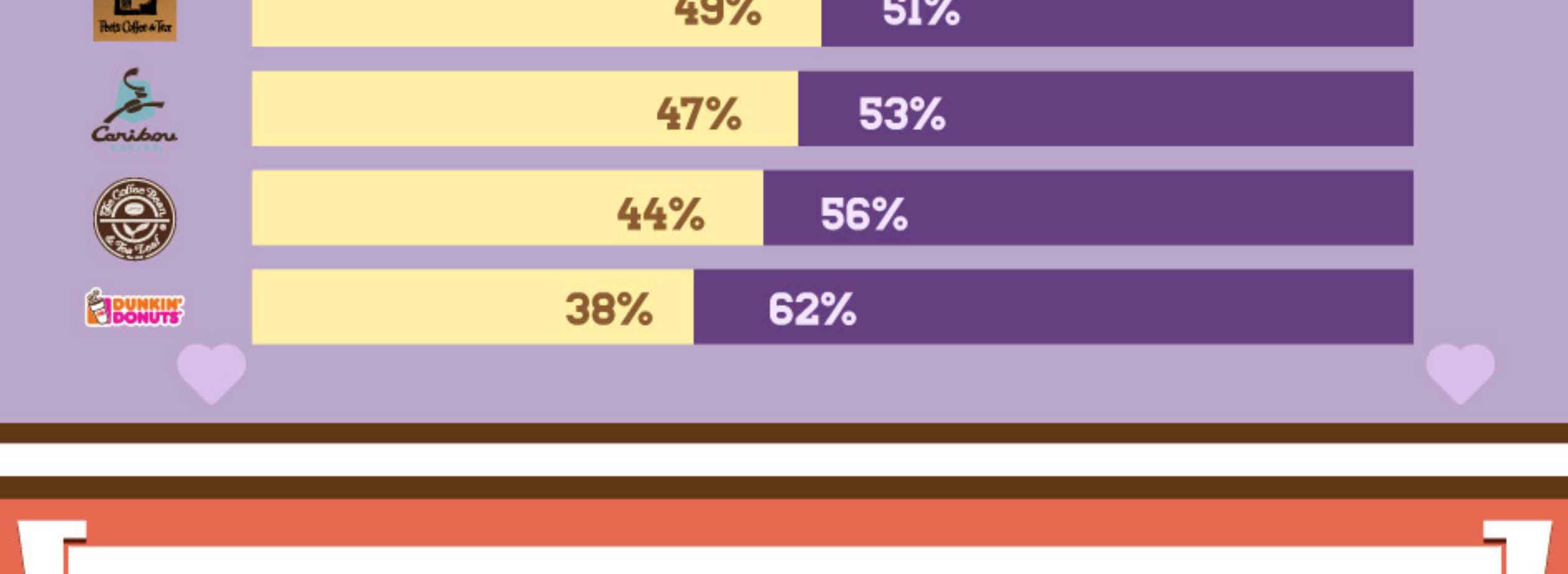
TIM HORTONS CUSTOMERS CARE THE MOST ABOUT LOCATION, SPEED & PRICE

CARIBOU CUSTOMERS CARE THE MOST ABOUT QUALITY AND SERVICE.



WHICH CHAINS ARE MOST POPULAR WITH WHICH AGES?

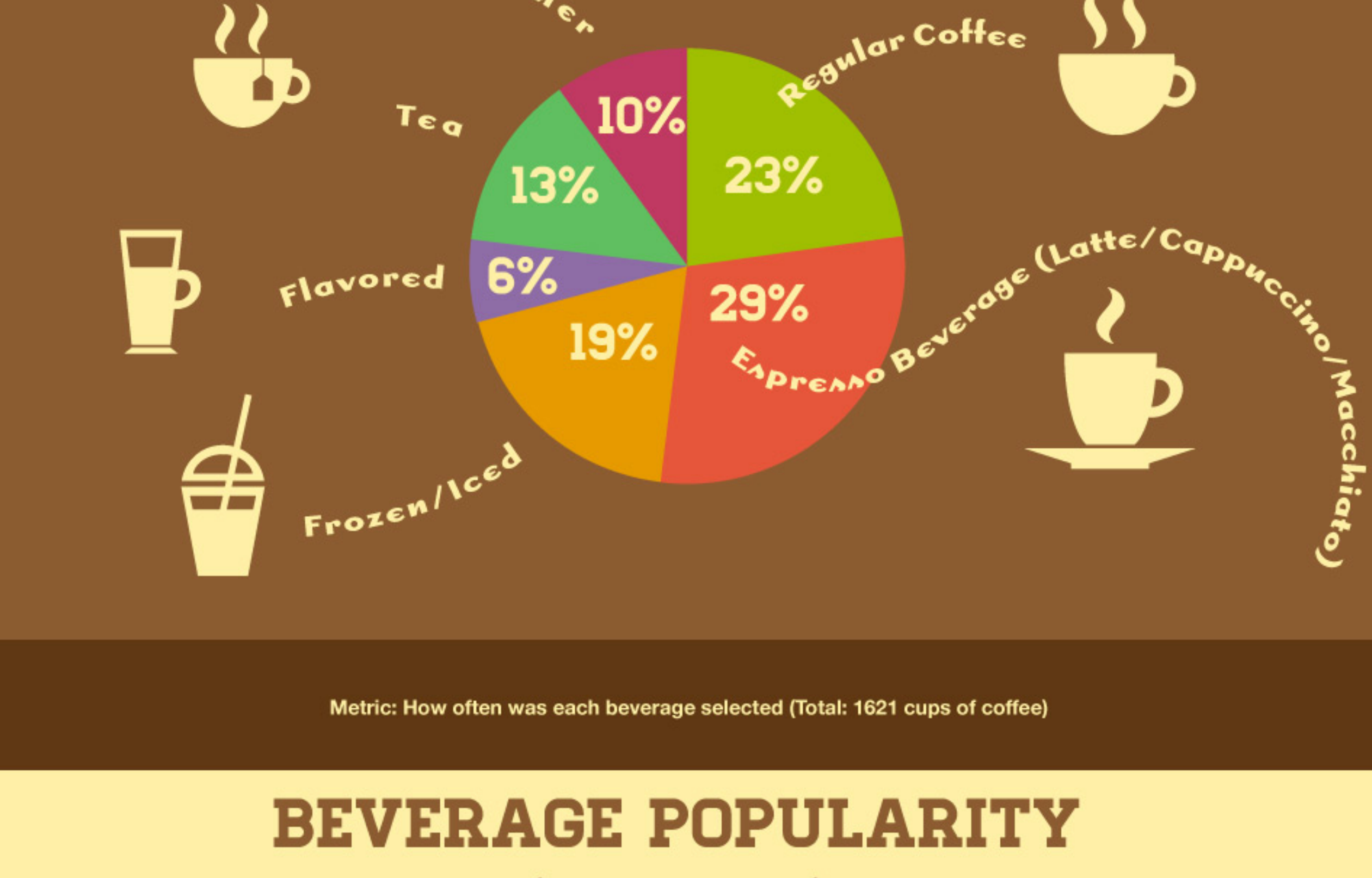
TIM HORTONS CUSTOMERS SKEW THE YOUNGEST. DUNKIN' DONUTS SKEWS THE OLDEST.



COFFEE DRINKING HABITS OF AMERICA: WHAT WE DRINK ... AND WHY

BEVERAGE POPULARITY (BY TYPE)

LATTES/CAPPUCINOS/MACCHIATOS ARE #1



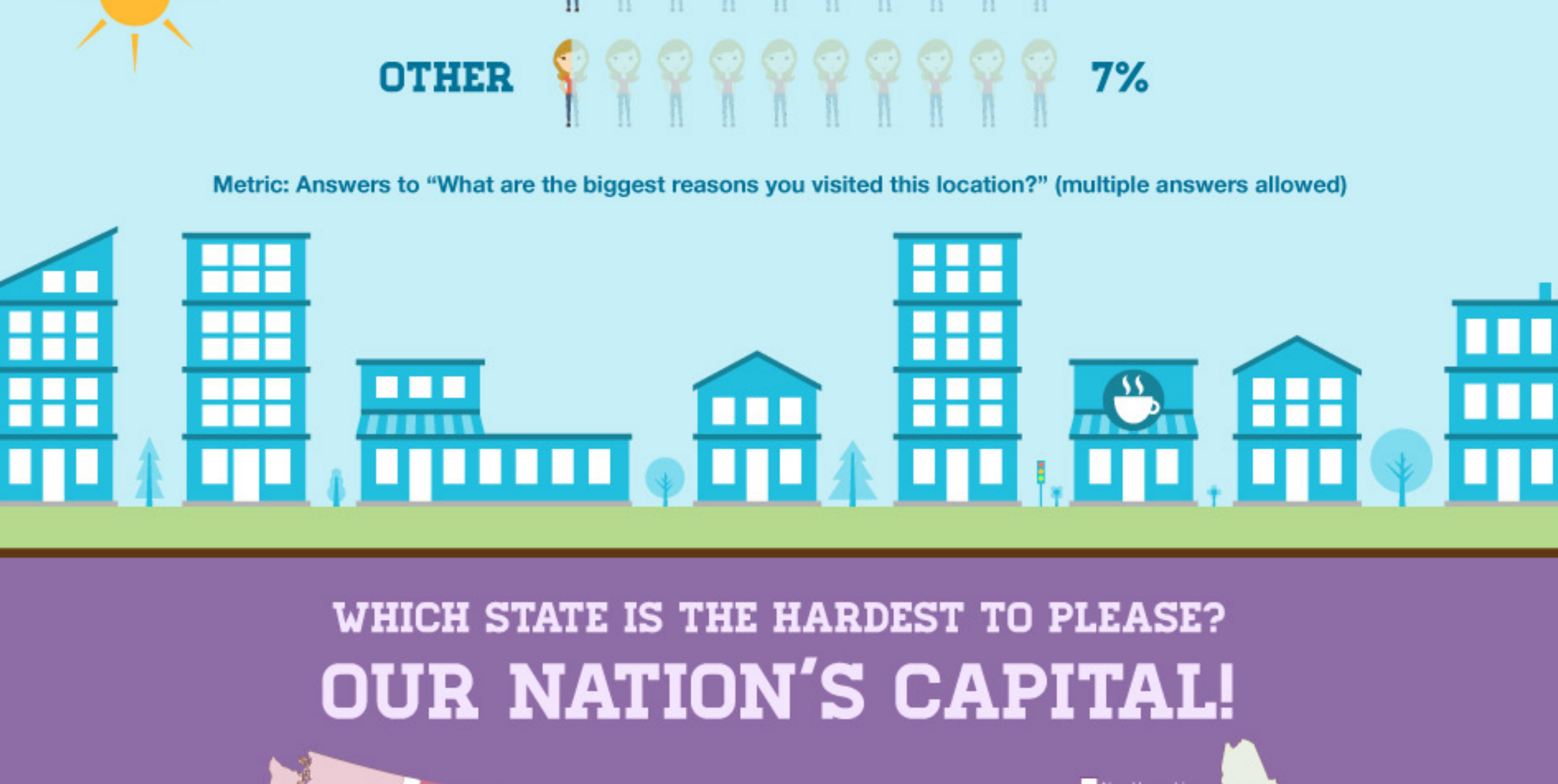
BEVERAGE POPULARITY (BY AGE GROUPS)

OLDER GROUPS CHOOSE REGULAR COFFEE, FLAVORED COFFEE & TEA MORE OFTEN THAN YOUNGER GROUPS
YOUNGER GROUPS CHOOSE FROZEN/ICED & ESPRESSO BASED BEVERAGES



#1 REASON FOR CHOOSING THIS STORE:

LOCATION, LOCATION, LOCATION!



WHICH STATE IS THE HARDEST TO PLEASE? OUR NATION'S CAPITAL!

