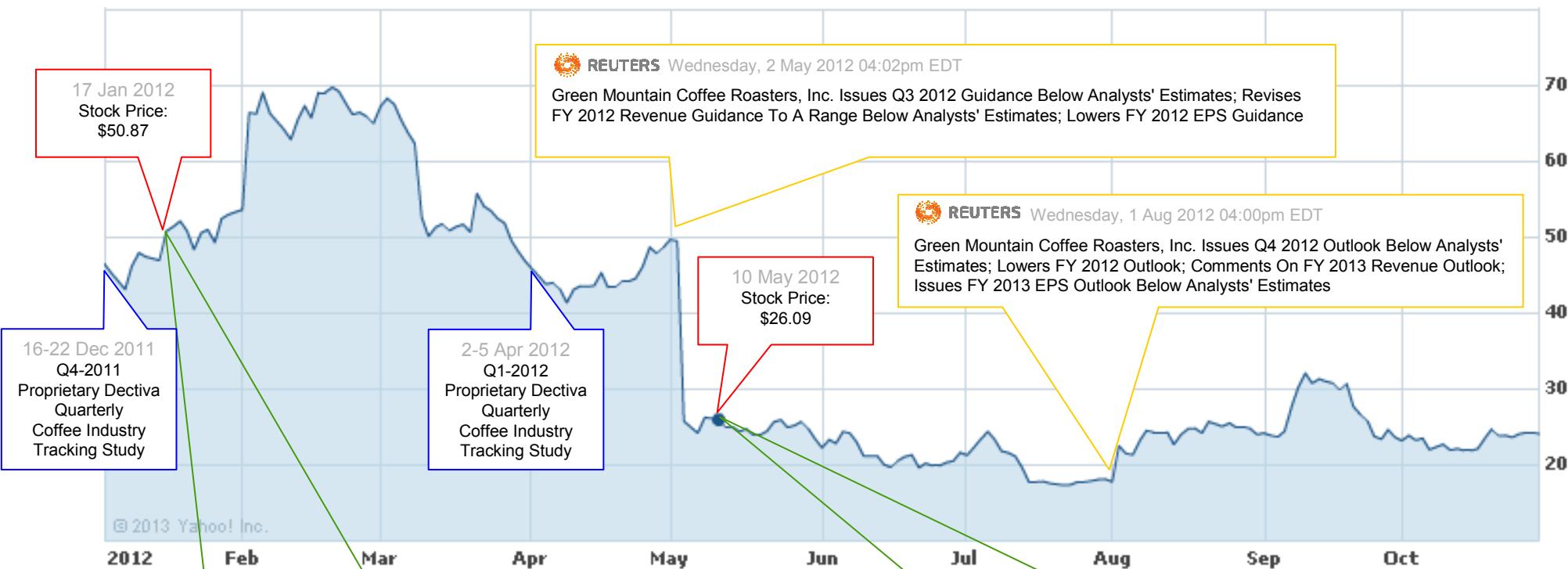


# GMCR Stock Performance – 2012

Dectiva issues warning in January 2012 accurately predicting slowing growth in consumer demand months in advance of disappointing company quarterly earnings announcement

Proprietary quarterly Dectiva Coffee Industry tracking survey data delivered to clients ahead of company earnings announcements for actionable investment decision making.



17 Jan 2012 – Dectiva issues the following via Twitter :



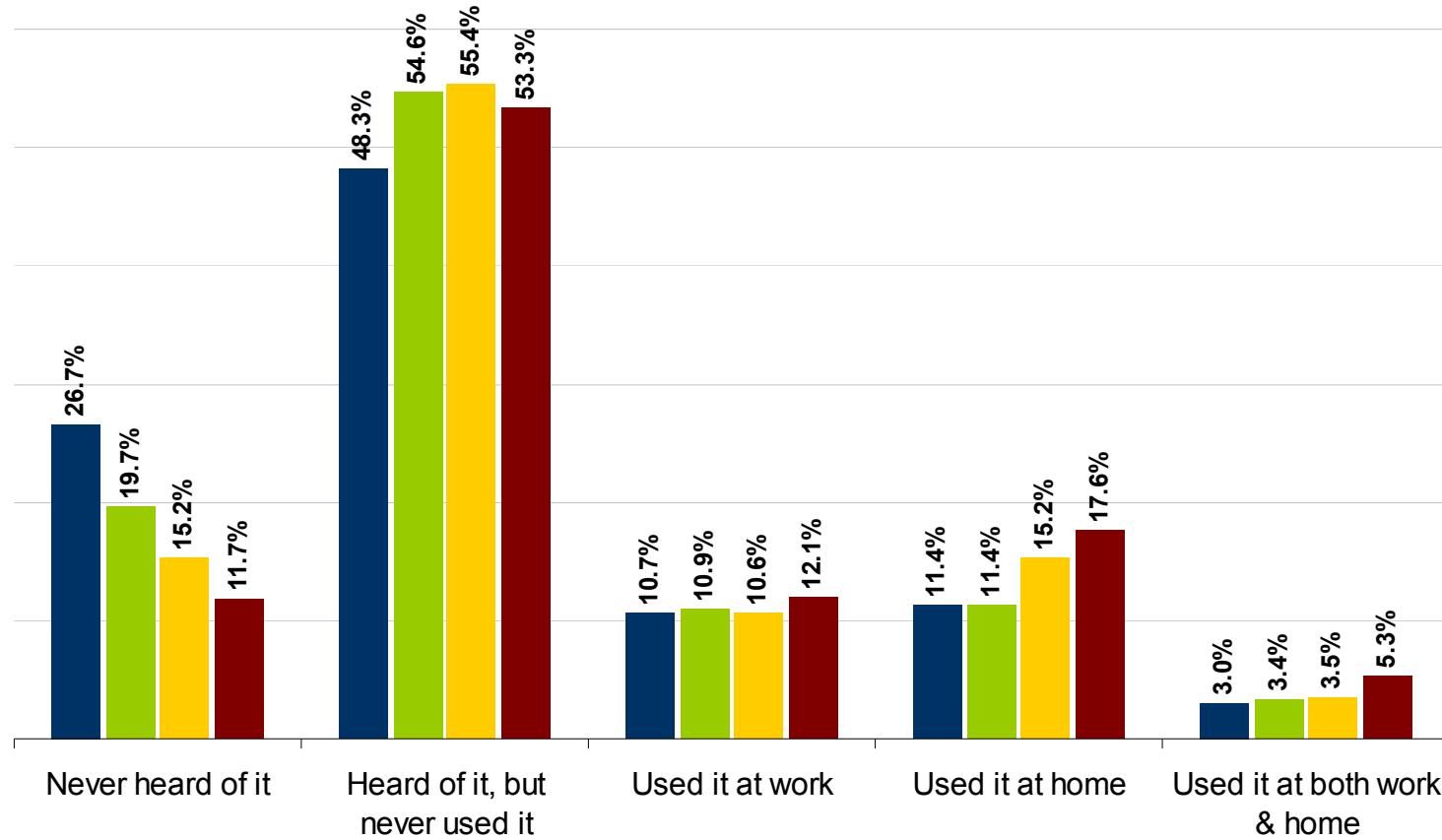
10 May 2012 – Dectiva issues the following via Twitter :



# Usage & awareness levels – Keurig K-Cups

■ Q2-2011 ■ Q3-2011 ■ Q4-2011 ■ Q1-2012

## Keurig - K-Cup single-serving brewing system



Source: Dectiva Coffee Industry Tracking Survey  
Q1-2012 – Data collected: April 2-5, 2012

# Summary of proprietary metrics included in *Coffee Industry* tracking study

## Category Trends

- A quantitative quarterly tracking survey of N=2,500 U.S. coffee drinkers regarding their consumption of coffee and espresso-based beverages (including specialty coffee, cappuccino, latte, and blended iced beverages)
  - » Current consumption volumes
    - » By location – Brew-at-home vs. coffee-shops/restaurants/take-out locations
  - » Shifts in forecasted spend (*coming 90 days*)
  - » Market share, consumer awareness levels by specific retailers/brands
  - » Impact of the economy on the frequency of out-of-home coffee purchase behavior & impact on grocery store/in-home brewing market share
  - » Differences in demographic profiles by specific retailers/brands

## Coffee Retailer-Specific Tracking

- Starbucks retail & Instant 'Via'
- McDonald's
- Dunkin' Donuts
- Tim Horton's
- Caribou Coffee
- Peet's
- Panera
- Green Mountain Coffee Roasters (Keurig K-Cups)

- » Brand loyalty and propensity to trade up/down between retailers
- » Cross-shopping behavior between stores and impact on market share expansion

# Overview of services

## Market Research Intelligence:

### Make More Informed Investment and Management Decisions

Dectiva specializes in delivering quantitative and qualitative market research data and analysis to leading investment and business decision makers. By providing access to a global panel of survey and interview respondents, Dectiva empowers its clients with proprietary knowledge and timely insights in the consumer, healthcare, and technology industries. Dectiva serves top hedge funds, private equity firms, other institutional investors, and corporate entities.

### Dectiva's Market Research Professionals

Our dedicated analysts excel in survey instrument design and data analysis. They deliver results with analytical insights and actionable recommendations based on their expertise in a broad range of sectors.

### Unparalleled Reach for Study Participant Recruitment

We provide our clients with direct access to an extensive database including millions of qualified consumers:

- » All participants are pre-profiled to allow for exceptional targeting and to ensure they match the specific demographic and/or psychographic profile needed for each unique study
- » Specific consumer segments can be targeted by particular demographic attributes, shoppers of specific stores, and owners of specific products/brands
- » Participants from a large number of international countries are available

### Clients Use Dectiva To:

- » Monitor market demand for specific products and brands
- » Gauge customer perceptions of products, services, and brands
- » Conduct market sizing assessments to quantify key market segments and customer attributes
- » Forecast consumer spending by product category
- » Track the impact of economic factors on purchase intentions





Make more informed investment &  
management decisions

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