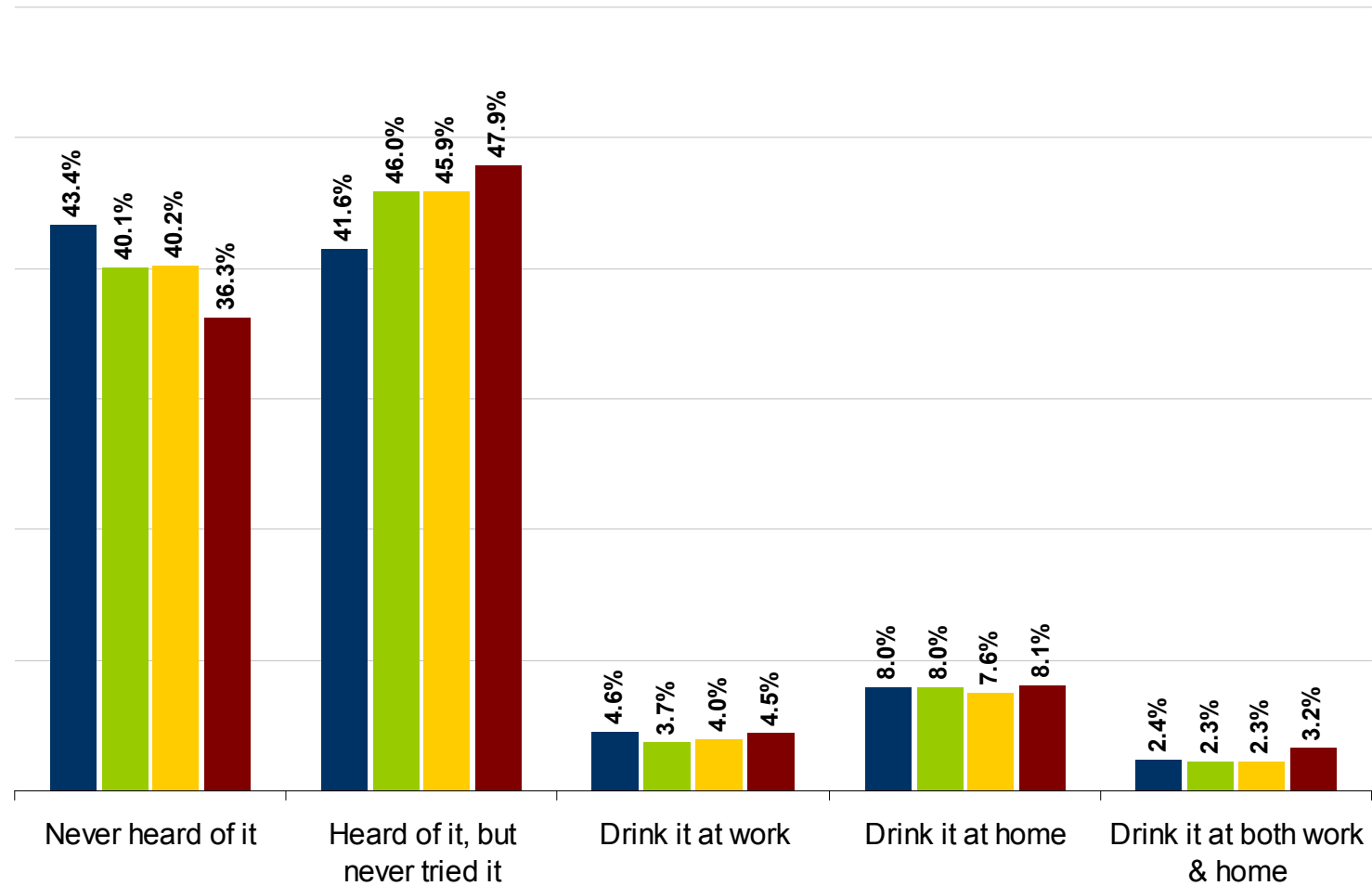


# Usage & awareness levels – Starbucks VIA instant coffee

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

## Starbucks brand VIA 'Ready Brew' instant coffee



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 tracking survey of 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 *Coffee Industry* tracking study methodology

## Data collection methodology

- Web-based survey
  - » N=2,500+ unique respondents per wave
- Robust sample size
  - » Sample census-weighted by age, gender, household income, geography, ethnicity
- Representative of general-population consumers

## Data collection frequency

- Allows for robust industry tracking
  - » Q2-2011 – June 28 – July 8, 2011
  - » Q3-2011 – Sept 20 – Oct 3, 2011
  - » Q4-2011 – Dec 16 – Dec 22, 2011
  - » Q1-2012 – Apr 2 – Apr 5, 2012
- » Core tracking questions collected on a quarterly schedule
- » Next wave of data collection scheduled for June 25-29, 2012

## Additional Notes

- Retailer/brand-specific questions can be added into the tracking at the request of subscribers of this report

# 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 industry. Dectiva serves institutional investment, venture capital, private equity, 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

## **Syndicated Reports Available for Sale:**

- » Restaurant Industry Tracking Study
- » Coffee Industry Tracking Study
- » Beer Industry Tracking Study





# DECTIVA

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