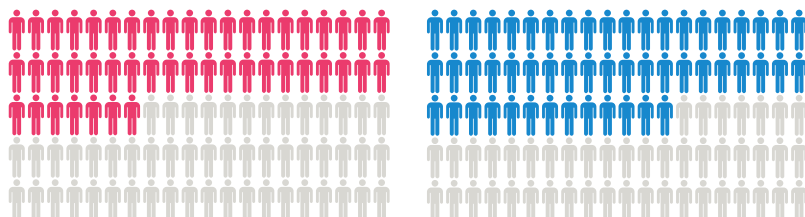


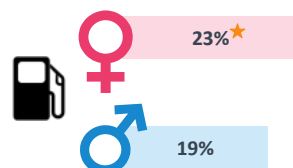
WINNING OVER WOMEN IN CONVENIENCE STORES



Both Women and Men Shop C-Stores C-Store Food & Beverage Traffic by Gender 47% Women vs. 53% Men²



Women More Likely to Make Gas-Only Trips % of Visits Including Only Gas



★ SIGNIFICANTLY HIGHER

Convenience is #1 Factor In Store Choice Regardless of Gender

60%

Say convenience is reason for choosing a c-store over other stores

"Usually more convenient – they have shorter lines, faster service, easier to locate merchandise, etc." --Female

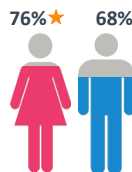
"Easier to get in and out of there. It's also quicker." --Female

"It is close to work and home and I get gas anyways." --Male

Women Show Stronger Interest In Fresh, Made-to-Order and Better-for-You Food

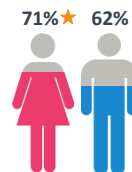
% Would Visit C-Store More Often

Fresh, Made-to-Order Food Offered in Store



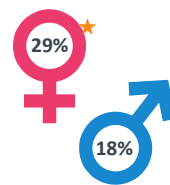
★ SIGNIFICANTLY HIGHER

Better-for-You Food and Beverages



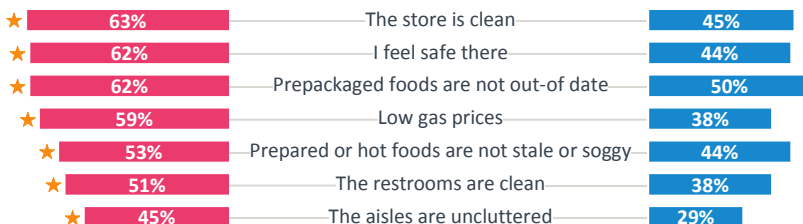
Women More Concerned with Freshness

% Wish Food Were Fresher at C-Stores



★ SIGNIFICANTLY HIGHER

Women More Likely Than Men to Cite a Variety of Aspects of Store Experience as Important When Visiting a C-Store % Extremely Important



★ SIGNIFICANTLY HIGHER



INSIGHT: Women are more likely than men to make a gas-only trip to c-stores.

IMPLICATION: Pump signage and merchandising must be particularly strong to entice them to come inside.

INSIGHT: Many women are skeptical of the freshness and quality of c-store food.

IMPLICATION: Over-communicate the freshness and quality of offerings to overcome negative preconceptions.

INSIGHT: Women are more discerning than men when it comes to the overall c-store environment and experience.

IMPLICATION: Clean and uncluttered floors, counters, and restrooms will increase appeal to women.



Source: (1) General Mills C-Store Consumer Research. n=474 C-Store food and beverage shoppers.(n=234 Women; n=240 Men) January 2014; (2) NPD Crest, Total US C-Stores, 12 months ending March 2014.