

NEWS RELEASE



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TORONTO

April 8th, 2016

HIGHLIGHTS:

- Tim Horton's is seen to have the best customer satisfaction among Canada's leading coffee shops.
- "It wouldn't be too hard to guess the results of this survey, given Canadians' attachment to the iconic status of Timmie's. Starbucks may have more blends, and others may sell a product more closely resembling coffee, but it is to Tim's that Canadians turn when they need a coffee fix (and don't forget the crullers)," said Forum Research President, Dr. Lorne Bozinoff.

FOR IMMEDIATE RELEASE

Timmie's tops in customer satisfaction

Starbucks and Tim Horton's lead in Canada

TORONTO April 8th, 2016 - In a random sampling of public opinion taken by the Forum Poll™ among 1326 Canadian adults, Tim Horton's is seen to have the best customer satisfaction among Canada's leading coffee shops, and it is closely followed by Starbucks, which, however, draws fewer customers.

Overall, more than 8-in-10 Canadians are satisfied with Tim Horton's (82%), and as many as one half are "very satisfied" (52%). Incidence of visiting Tim's is close to universal (89%). Average score for Tim's is 3.3 out of 4.0.

About one half of Canadians have visited a Starbucks (49%) and more than 8-in-10 of these patrons are satisfied (82%), although somewhat fewer than at Tim Horton's are "very satisfied" (42%). Starbucks' average satisfaction score is 3.2 out of 4.0.

After these two market leaders, Second Cup, visited by about one quarter (27%), is seen to be satisfactory among 8-in-10 (81%), and just fewer than 4-in-10 are "very satisfied" (42%). The average score for Second Cup is 3.1 out of 4.0.

AL Van Houtte is visited by very few as a Quebec regional chain (7%), but it scores three quarters for satisfaction (76%) and one quarter for "very satisfied" (26%). Its average score is 3.1.

Timothy's (visited by one tenth, or 11%) has a satisfaction score of 7-in-10 overall (71%), while more than a third are "very satisfied" (36%). Average satisfaction score for Timothy's is 2.9 out of 4.0.

Coffee Time falls at the bottom of this list, visited by about one tenth (9%) and seen to be satisfactory by just two thirds (62%), while as few as 3-in-10 find them very satisfactory (29%). Their average score is just 2.7 out of 4.0.

"It wouldn't be too hard to guess the results of this survey, given Canadians' attachment to the iconic status of Timmie's. Starbucks may have more blends, and others may sell a product more closely resembling coffee, but it is to Tim's that Canadians turn when they need a coffee fix (and don't forget the crullers)," said Forum Research President, Dr. Lorne Bozinoff.

Lorne Bozinoff, Ph.D. is the president and founder of Forum Research. He can be reached at lbozinoff@forumresearch.com or at (416) 960-9603.

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Methodology

The Forum Poll™ was conducted by Forum Research with the results based on an interactive voice response telephone survey of 1326 randomly selected Canadians 18 years of age or older. The poll was conducted on March 30th and March 31st, 2016.

Results based on the total sample are considered accurate +/- 3%, 19 times out of 20. Subsample results will be less accurate. Margins of error for subsample (such as age, gender) results are available at www.forumresearch.com/samplestim.asp

Where appropriate, the data has been statistically weighted by age, region, and other variables to ensure that the sample reflects the actual population according to the latest Census data.

This research is not necessarily predictive of future outcomes, but rather, captures opinion at one point in time. Forum Research conducted this poll as a public service and to demonstrate our survey research capabilities. Forum houses its poll results in the Data Library of the Department of Political Science at the University of Toronto.

With offices across Canada and around the world, 100% Canadian-owned Forum Research is one of the country's leading survey research firms. This Forum Poll™ and other polls may be found at Forum's poll archive at www.forumresearch.com/polls.asp

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Overall Satisfaction with Coffee Shops

%	TOP2	BTM2	Very Satisfied	Somewhat satisfied	Not very satisfied	Not at all satisfied	Visited
Tim Horton's	84	16	52	32	11	5	82
Starbucks	83	17	42	41	12	5	49
Second Cup	81	19	37	43	12	7	27
Timothy's	71	29	36	35	13	16	11
Coffee Time	62	38	29	32	19	19	9
A.L. Van Houtte	85	15	26	59	11	4	7

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Coffee Shop Visited Summary

[All Respondents]

Age / Gender

%	Total	18-34	35-44	45-54	55-64	65+	Male	Female
Sample	1326	271	195	226	305	329	664	662
Starbucks	49	67	54	46	34	29	48	49
Second Cup	27	37	24	30	19	20	29	26
Tim Horton's	82	92	84	82	75	68	81	83
Coffee Time	9	9	7	10	9	10	11	7
Timothy's	11	9	8	14	10	12	12	10
A.L. Van Houtte	7	7	9	9	4	4	6	8

Region

%	Total	ATL	PQ	ON	MB SK	AB	BC
Sample	1326	95	295	534	84	147	171
Starbucks	49	42	38	49	46	57	65
Second Cup	27	26	25	28	15	41	24
Tim Horton's	82	91	78	87	77	79	75
Coffee Time	9	0	7	17	0	7	0
Timothy's	11	6	9	17	6	11	0
A.L. Van Houtte	7	0	28	0	0	0	0

Income

%	Total	<\$20K	\$20-\$40K	\$40-\$60K	\$60-\$80K	\$80-\$100K	\$100-\$250K	\$250K+
Sample	1326	173	207	201	137	113	211	32
Starbucks	49	46	41	44	42	51	63	69
Second Cup	27	35	23	24	20	26	31	44
Tim Horton's	82	78	83	81	77	84	85	88
Coffee Time	9	13	9	6	5	9	8	27
Timothy's	11	17	10	6	5	6	14	26
A.L. Van Houtte	7	12	5	6	6	8	6	12

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Overall Experience Satisfaction - Starbucks

‘Overall, how satisfied are you with your overall experience with each of the following coffee shops in the past 12 months?’ + ‘Starbucks’

[All Respondents]

Age / Gender

%	Total	18-34	35-44	45-54	55-64	65+	Male	Female
Sample	589	179	106	104	104	96	292	297
Very Satisfied	42	38	44	44	48	42	43	41
Somewhat Satisfied	41	43	44	38	37	36	34	47
Somewhat Dissatisfied	12	12	10	13	12	13	14	10
Very Dissatisfied	5	7	2	5	3	8	9	2
Mean	3.2	3.1	3.3	3.2	3.3	3.1	3.1	3.3

Region

%	Total	ATL	PQ	ON	MB SK	AB	BC
Sample	589	37	101	238	34	80	99
Very Satisfied	42	40	45	42	42	40	40
Somewhat Satisfied	41	35	42	41	39	40	41
Somewhat Dissatisfied	12	20	8	12	11	13	12
Very Dissatisfied	5	4	4	4	8	6	7
Mean	3.2	3.1	3.3	3.2	3.1	3.1	3.1

Income

%	Total	<\$20K	\$20-\$40K	\$40-\$60K	\$60-\$80K	\$80-\$100K	\$100-\$250K	\$250K+
Sample	589	61	75	79	56	57	126	22
Very Satisfied	42	49	30	31	46	53	43	21
Somewhat Satisfied	41	31	51	51	44	36	40	40
Somewhat Dissatisfied	12	11	16	17	9	10	11	5
Very Dissatisfied	5	9	3	1	1	1	6	34
Mean	3.2	3.2	3.1	3.1	3.3	3.4	3.2	2.5

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Overall Experience Satisfaction – Second Cup

‘Overall, how satisfied are you with your overall experience with each of the following coffee shops in the past 12 months?’ + ‘Second Cup’

[All Respondents]

Age / Gender

%	Total	18-34	35-44	45-54	55-64	65+	Male	Female
Sample	341	102	47	67	59	66	183	158
Very Satisfied	37	34	33	45	30	46	34	41
Somewhat Satisfied	43	43	47	39	51	39	45	41
Somewhat Dissatisfied	12	14	18	6	12	7	11	13
Very Dissatisfied	7	8	2	11	7	8	9	5
Mean	3.1	3.0	3.1	3.2	3.0	3.2	3.0	3.2

Region

%	Total	ATL	PQ	ON	MB SK	AB	BC
Sample	341	23	70	142	14	56	36
Very Satisfied	37	61	43	37	44	29	23
Somewhat Satisfied	43	29	41	46	22	48	47
Somewhat Dissatisfied	12	7	10	9	18	18	17
Very Dissatisfied	7	3	6	8	16	5	13
Mean	3.1	3.5	3.2	3.1	2.9	3.0	2.8

Income

%	Total	<\$20K	\$20-\$40K	\$40-\$60K	\$60-\$80K	\$80-\$100K	\$100-\$250K	\$250K+
Sample	341	54	46	45	30	28	62	14
Very Satisfied	37	28	50	31	42	39	39	38
Somewhat Satisfied	43	48	30	46	42	47	44	0
Somewhat Dissatisfied	12	16	8	24	16	11	8	8
Very Dissatisfied	7	8	12	0	0	3	8	54
Mean	3.1	3.0	3.2	3.1	3.3	3.2	3.1	2.2

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Overall Experience Satisfaction – Tim Horton’s

‘Overall, how satisfied are you with your overall experience with each of the following coffee shops in the past 12 months?’ + ‘Tim Horton’s’

[All Respondents]

Age / Gender

%	Total	18-34	35-44	45-54	55-64	65+	Male	Female
Sample	1051	248	164	186	228	225	525	526
Very Satisfied	52	47	51	50	56	62	48	55
Somewhat Satisfied	32	31	33	35	35	29	34	31
Somewhat Dissatisfied	11	16	10	9	6	7	12	10
Very Dissatisfied	5	6	7	5	3	3	7	4
Mean	3.3	3.2	3.3	3.3	3.4	3.5	3.2	3.4

Region

%	Total	ATL	PQ	ON	MB SK	AB	BC
Sample	1051	83	218	452	64	114	120
Very Satisfied	52	50	57	52	46	43	52
Somewhat Satisfied	32	35	31	32	30	35	32
Somewhat Dissatisfied	11	12	9	10	17	12	10
Very Dissatisfied	5	3	3	5	7	10	7
Mean	3.3	3.3	3.4	3.3	3.2	3.1	3.3

Income

%	Total	<\$20K	\$20-\$40K	\$40-\$60K	\$60-\$80K	\$80-\$100K	\$100-\$250K	\$250K+
Sample	1051	126	166	159	102	93	179	27
Very Satisfied	52	61	60	48	51	40	42	41
Somewhat Satisfied	32	26	25	39	36	38	38	26
Somewhat Dissatisfied	11	9	11	7	11	14	13	14
Very Dissatisfied	5	4	4	6	2	7	8	19
Mean	3.3	3.4	3.4	3.3	3.4	3.1	3.1	2.9

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Overall Experience Satisfaction – Coffee Time

‘Overall, how satisfied are you with your overall experience with each of the following coffee shops in the past 12 months?’ + ‘Coffee Time’

[AB, ON, QC only]

Age / Gender

%	Total	18-34	35-44	45-54	55-64	65+	Male	Female
Sample	124	25	15	22	27	35	75	49
Very Satisfied	29	18	34	37	41	26	33	25
Somewhat Satisfied	32	31	29	37	29	34	22	47
Somewhat Dissatisfied	19	27	17	9	15	22	21	16
Very Dissatisfied	19	24	20	18	15	17	24	13
Mean	2.7	2.4	2.8	2.9	3.0	2.7	2.6	2.8

Region

%	Total	PQ	ON	AB
Sample	124	19	94	11
Very Satisfied	29	24	33	12
Somewhat Satisfied	32	42	30	35
Somewhat Dissatisfied	19	14	20	18
Very Dissatisfied	19	20	18	35
Mean	2.7	2.7	2.8	2.2

Income

%	Total	<\$20K	\$20-\$40K	\$40-\$60K	\$60-\$80K	\$80-\$100K	\$100-\$250K	\$250K+
Sample	124	22	19	13	9	10	19	9
Very Satisfied	29	42	26	38	28	23	37	0
Somewhat Satisfied	32	28	43	24	72	30	27	13
Somewhat Dissatisfied	19	22	31	27	0	29	10	0
Very Dissatisfied	19	8	0	11	0	18	25	87
Mean	2.7	3.0	3.0	2.9	3.3	2.6	2.8	1.3

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Overall Experience Satisfaction – Timothy’s

‘Overall, how satisfied are you with your overall experience with each of the following coffee shops in the past 12 months?’ + ‘Timothy’s’

[AB, MB, ON, QC, NB, PEI only]

Age / Gender

%	Total	18-34	35-44	45-54	55-64	65+	Male	Female
Sample	148	26	17	32	31	42	77	71
Very Satisfied	36	25	31	43	39	43	29	44
Somewhat Satisfied	35	24	53	32	45	31	36	34
Somewhat Dissatisfied	13	20	11	9	9	12	16	9
Very Dissatisfied	16	31	5	16	7	15	19	14
Mean	2.9	2.4	3.1	3.0	3.2	3.0	2.8	3.1

Region

%	Total	ATL	PQ	ON	MB SK	AB
Sample	148	6	25	94	6	17
Very Satisfied	36	47	30	37	34	42
Somewhat Satisfied	35	16	37	37	13	31
Somewhat Dissatisfied	13	27	17	10	13	15
Very Dissatisfied	16	10	16	16	40	11
Mean	2.9	3.0	2.8	2.9	2.4	3.0

Income

%	Total	<\$20K	\$20-\$40K	\$40-\$60K	\$60-\$80K	\$80-\$100K	\$100-\$250K	\$250K+
Sample	148	30	23	13	8	8	29	9
Very Satisfied	36	36	56	34	81	9	16	8
Somewhat Satisfied	35	27	29	38	19	76	56	0
Somewhat Dissatisfied	13	10	12	28	0	15	10	12
Very Dissatisfied	16	27	4	0	0	0	17	80
Mean	2.9	2.7	3.4	3.1	3.8	2.9	2.7	1.4

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Overall Experience Satisfaction – A.L. Van Houtte

‘Overall, how satisfied are you with your overall experience with each of the following coffee shops in the past 12 months?’ + ‘A.L. Van Houtte’

[QC only]

Age / Gender

%	Total	18-34	35-44	45-54	55-64	65+	Male	Female
Sample	76	16	17	20	12	11	33	43
Very Satisfied	26	9	26	35	34	45	17	32
Somewhat Satisfied	59	67	58	60	58	36	74	49
Somewhat Dissatisfied	11	20	17	0	8	0	7	13
Very Dissatisfied	4	4	0	5	0	19	3	5
Mean	3.1	2.8	3.1	3.3	3.3	3.1	3.0	3.1

Region

%	Total	PQ
Sample	76	76
Very Satisfied	26	26
Somewhat Satisfied	59	59
Somewhat Dissatisfied	11	11
Very Dissatisfied	4	4
Mean	3.1	3.1

Income

%	Total	<\$20K	\$20-\$40K	\$40-\$60K	\$60-\$80K	\$80-\$100K	\$100-\$250K	\$250K+
Sample	76	15	10	11	7	8	10	4
Very Satisfied	26	14	15	39	30	40	26	0
Somewhat Satisfied	59	58	49	61	55	60	74	55
Somewhat Dissatisfied	11	23	36	0	15	0	0	0
Very Dissatisfied	4	5	0	0	0	0	0	45
Mean	3.1	2.8	2.8	3.4	3.1	3.4	3.3	2.1

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