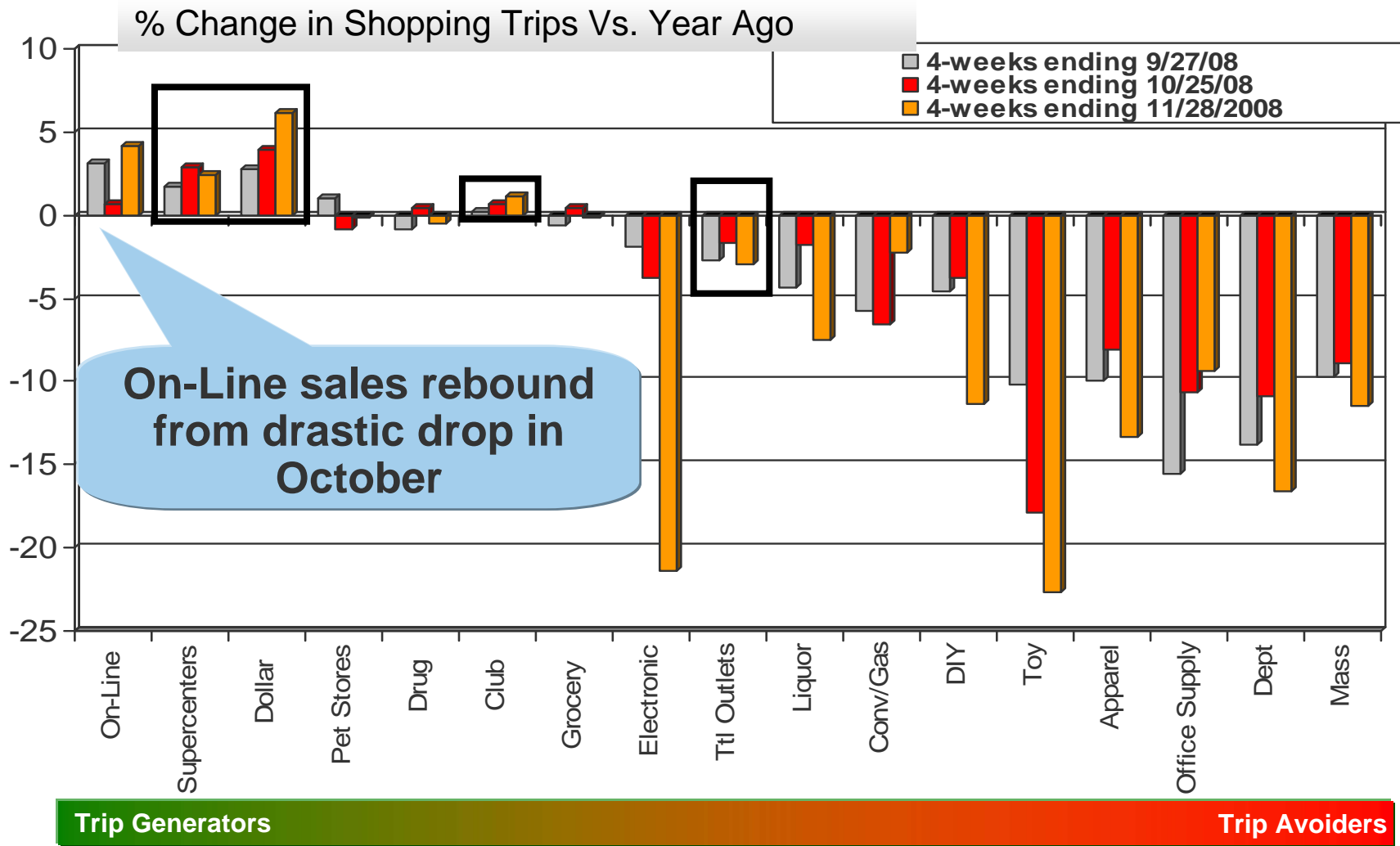


# Dramatic Declines in Discretionary Trips

## Consumers Seeking Value & Maintaining Trips to Food-Oriented Channels



Source: Homescan®, a service of The Nielsen Company

Excludes gas only trips