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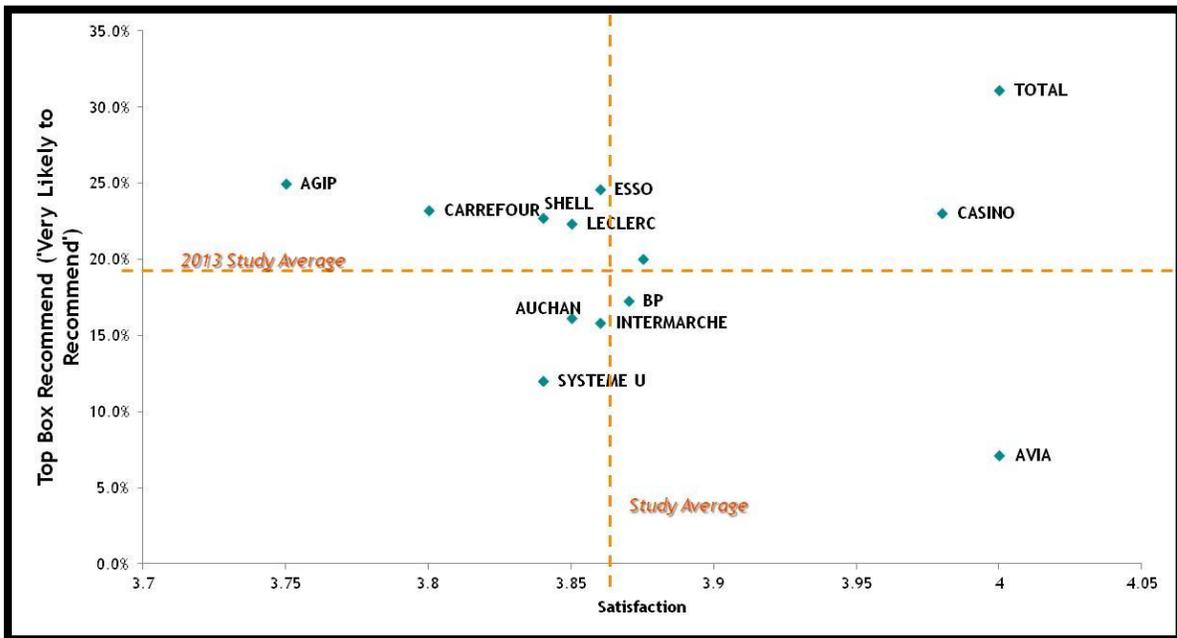
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Market Force Study Shows Total is Most Popular Petro Brand in France based on *Satisfaction Survey Results*

But opportunities remain to improve the customer experience

PARIS, France, July 9, 2013 – Total is where the French prefer to fill their gas tanks, according to a new independent study by Market Force Information, a worldwide leader in customer intelligence solutions. The brand won the highest marks for customer satisfaction among almost 1,600 study participants. Total scored more than 4.0 out of a 5 point scale, followed by Casino. Avia also scored highly on customer satisfaction, but did not score as highly on consumers' willingness to recommend the brand. See Graph 1.

Graph 1: Customer Satisfaction & Advocacy of Petrol Station Chains



The study was designed to uncover which petrol stations consumers frequent the most, as well as why they choose one over another.

With their low prices and the convenience of being able to fill up at the same time as doing your shopping, supermarket are continuing to take market share from national petrol retailers. When asked where they most frequently fuel their cars, just 38% of respondents said they go to a national petrol station chain. Meanwhile, 6 in 10 said they most frequently fuel up at a

supermarket petrol station. This is consistent with findings in both the UK and North America, as dominance of the national brands are being challenged by the supermarket chains.

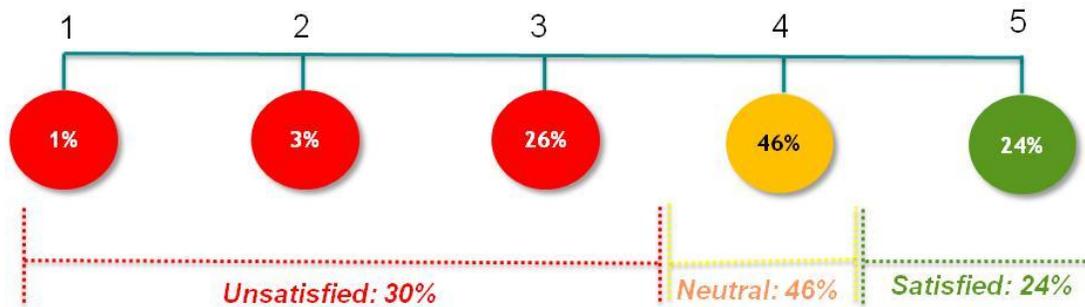
Some French consumers use loyalty cards for fill-ups, with 1 in 4 saying they used a loyalty card when fueling.

Just 1 in 4 Consumers are Highly Satisfied With their Experiences at Petrol Stations

When asked to rate their most recent experience at a gas station, 24% gave a 5 out of 5 score. But 30% were unhappy, scoring their experience a 1 – 3, and another 46% gave a neutral score. When pressed further, consumers admitted that they rarely told local station operators of their dissatisfaction if it occurred. Just 5% said they reported their concerns, and as a result, 86% said their concerns were not addressed.

Exacerbating that finding, just 6% of consumers reported that they were offered a survey to provide feedback.

Graph 2: Satisfaction with Most Recent Experience

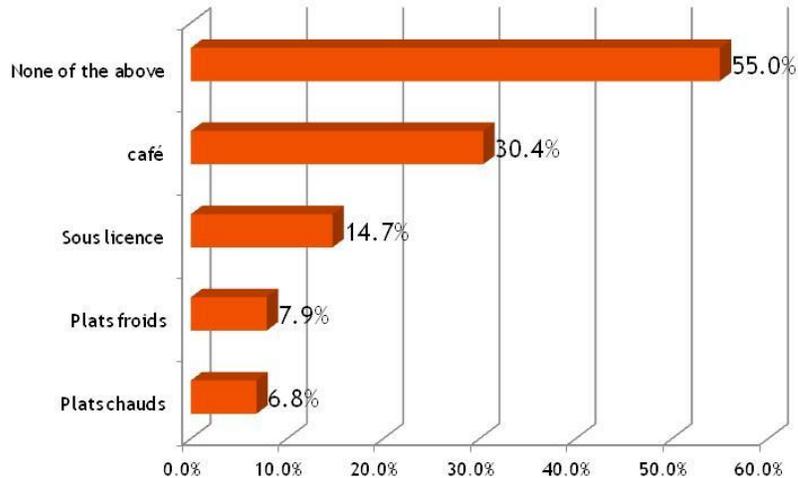


“In this survey, we found that nearly three quarters of consumers were either unsatisfied or neutral in regards to their most recent trip to a gas station,” said Janet Eden-Harros, chief marketing officer at Market Force. “Yet brands aren’t reaching out to ask for their feedback. There is a significant opportunity for petrol stations to increase their business by asking for customer input, and working on improving the customer experience based on that feedback. Market Force has found that delighted customers are more than three times more likely to recommend a business to friends, compared to neutral consumers.”

Coffee and Hot Food Draw Consumers

While price is a strong factor in consumer selection coffee and food selections are increasingly seen as draws to petrol stations. More than 1 in 3 consumers said that coffee would influence their choice of petrol station. See Graph 3.

Graph 3: Beyond Price, Would any of the Following Influence Your Choice of Petrol Brands?



“It’s no surprise to fuel brands that consumers care most about price, but what this research shows is that consumers also make decisions based on the service and products they receive at their favorite locations,” continued Eden-Harris.

Survey Demographics

The survey was conducted in June 2013 across France. The pool of 1,593 respondents reflected a broad spectrum of income levels, and ages ranged from 18 to over 65. Approximately 33% were men and 67% were women.

About Market Force Information

Market Force is the leading global [customer intelligence](http://www.marketforce.com) solutions company for multi-location businesses, including major retailers, restaurants, grocery and convenience stores, financial institutions, entertainment studios and consumer packaged goods companies. With more than 125 years of combined industry experience, Market Force Information has pioneered the industry with a suite of customer intelligence solutions – from proprietary decision-support tools to 600,000 field associates across Europe and North America who conduct mystery shopping, to real customer surveys, contact center solutions and social media monitoring. Its solutions enable brands to identify the actions required at the store level to increase customer loyalty and improve financial performance. For more information, visit <http://www.marketforce.com>

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