

FOOT TRAFFIC REPORT

FOR THE FUEL
& CONVENIENCE
STORE INDUSTRY

Q1 2017



A NEW ERA FOR THE CONVENIENCE STORE

As the convenience store industry adapts to meet customer needs and grow market share, location intelligence is becoming increasingly critical to understanding consumer habits and behaviors. GasBuddy and Cuebiq teamed up in the first quarter of 2017 to issue the first foot traffic report for the fuel and convenience store industry.

Highlights:

- GasBuddy and Cuebiq examined 23.5 million consumer trips to the pumps and convenience stores between January 1 and March 31.
- In Q1, more than half of GasBuddies visited locations within six miles of their homes or places of employment, giving retailers the opportunity to leverage their greatest resource—knowing their customer base—to localize and personalize their product selection.
- Weekdays between 11:00 a.m. and 1:00 p.m. were highly-trafficked hours in Q1. Convenience stores are poised to lure business away from QSRs and grocery stores now that customers can eat quality meals at the same place and time they choose to fill up their tanks.
- With filling a gas tank clocking in at an efficient 2-3 minutes, the 73% of GasBuddies who spent more than five minutes at locations in Q1 demonstrated that consumers are likely willing to spend some time in store before or after visiting the pumps.

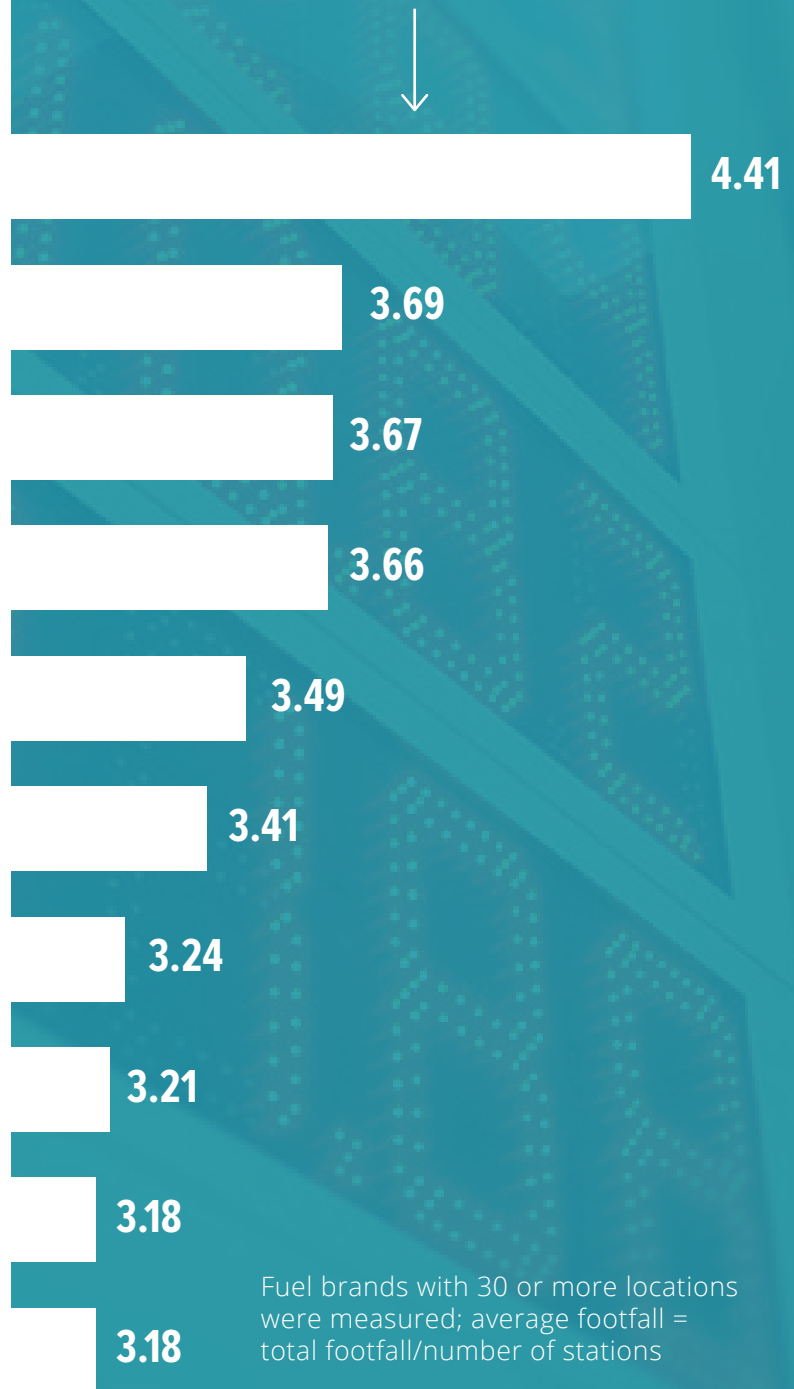
GasBuddy examined nearly 23.5 million consumer trips to gas stations and c-stores in Q1 2017

Which fuel brands captured the highest ratio of footfall per station?

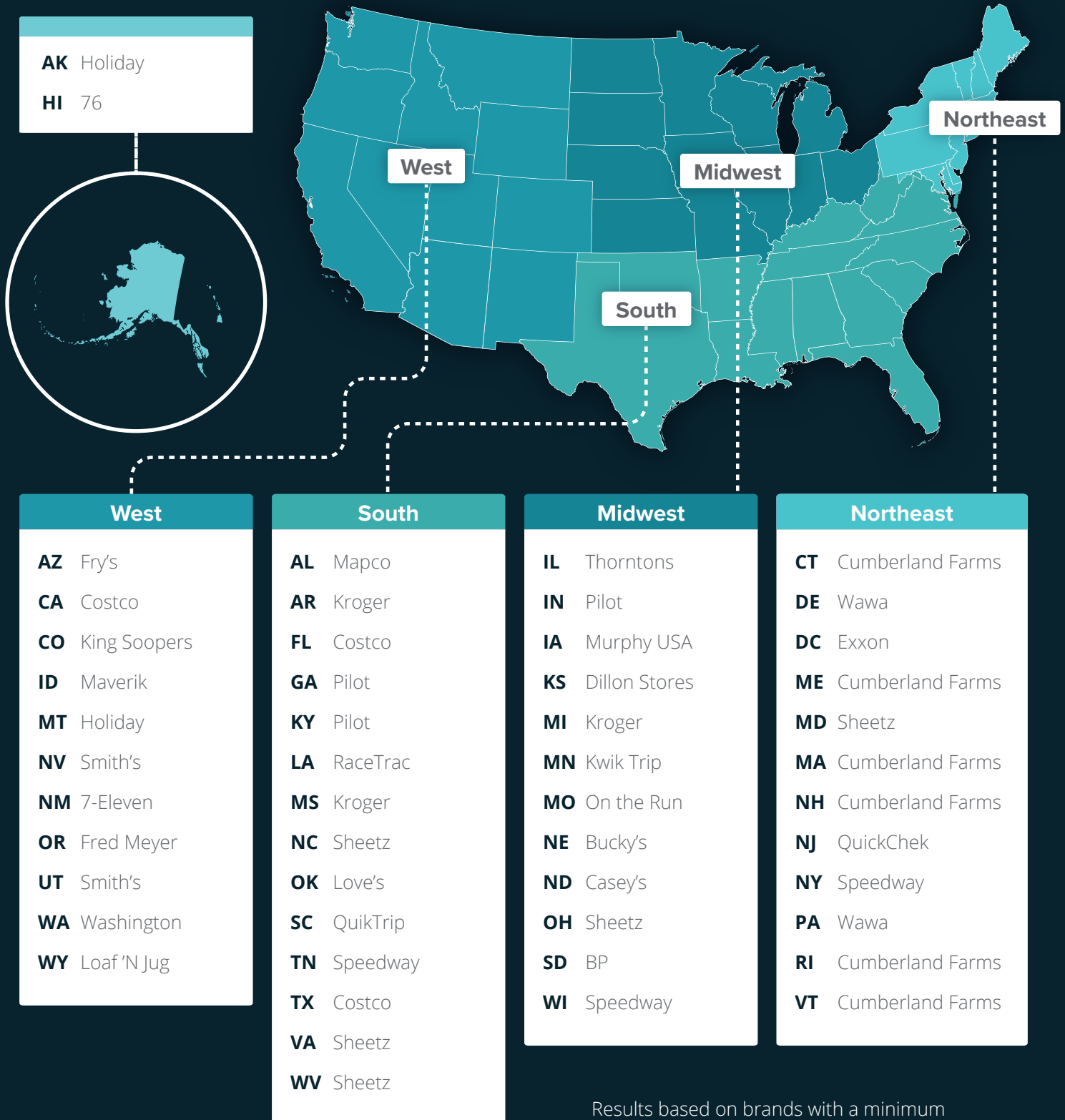
TOP 10 -----

- 1 Ricker's**
(47 locations measured, Indiana)
- 2 Family Express**
(65 locations, Indiana)
- 3 Thorntons**
(164 locations, FL, IL, IN, KY, OH, TN)
- 4 Costco**
(429 locations, national)
- 5 Meijer**
(188 locations, IL, IN, KY, MI, OH)
- 6 Pilot**
(407 locations, national)
- 7 GetGo**
(180 locations, IN, OH, PA, WV)
- 8 United Dairy Farmers**
(155 locations, IN, KY, OH)
- 9 Fry's**
(81 locations, Arizona)
- 10 Kroger**
(905 locations, 17 states)

Indiana-based gas station and convenience store chain Ricker's enjoys a loyal GasBuddy customer base—the nearly 50-station brand captured more than **4x the industry average footfall per location in Q1.**



BRANDS WITH HIGHEST AVERAGE FOOTFALL, BY STATE



Results based on brands with a minimum of 20 stations per state; average footfall = total footfall/number of stations

THE ORIGINAL HYPERLOCAL RETAILER

More than half of GasBuddies fuel up and shop within 6 miles of their homes or places of employment

No longer a road-trip-only destination, more and more consumers are stopping at gas stations and convenience stores for on-the-go meals and more.

Retailers are poised to personalize and localize the shopping experience to gain a competitive edge. They also can leverage their greatest resource—knowing their customer base—to determine what their customers want and which products to stock.



0-6 MI



57%



54%

6-10 MI



13%



15%

10-15 MI



10%



11%

20+ MI



14%



14%

15-20 MI



6%



6%

In Q1, Mondays came out on top, capturing the most visits during the week.



MOST VISITS



LEAST VISITS

LET'S DO LUNCH

Lunchtime is prime time in the fuel and convenience store industry. Stations and stores saw strong foot traffic between 11 a.m. and 1 p.m. on weekdays, posing a huge threat to QSRs and grocery stores. Retailers can capitalize on the crowd using their lunch hour to fill up by offering in-store promotions and great on-the-go lunch options.

MON

TUE

WED

THU

FRI

11 AM

1 PM

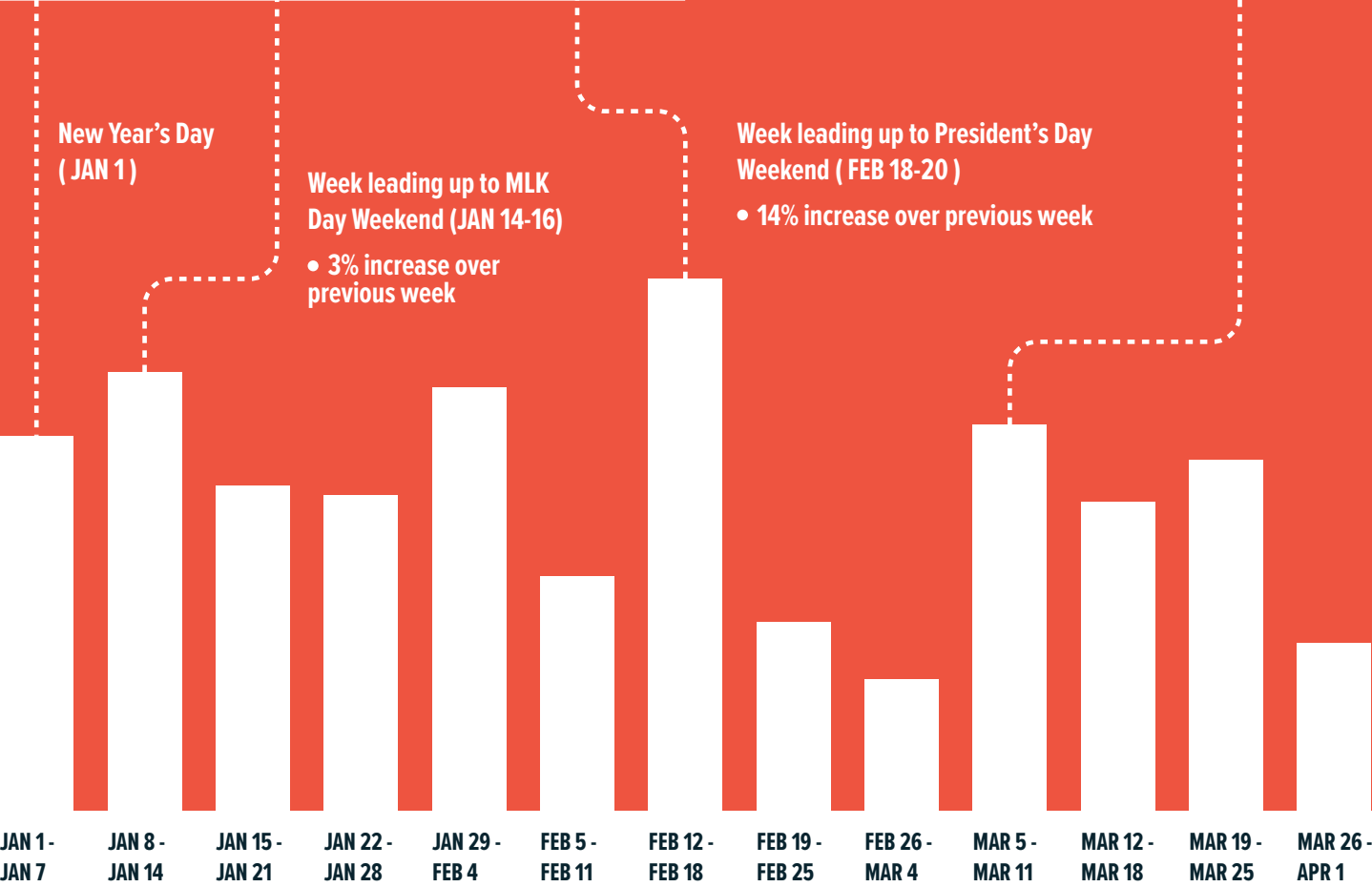


HIT THE GAS

The pumps saw more traffic on holidays and three-day weekends in Q1, with peak fueling happening the first week of the year, and the weeks leading up to the Monday MLK and President's Day holidays.

A Category 3 winter storm that brought three-to-five feet of snow to parts of New York, Pennsylvania and Vermont during Week 10 may have also caused a rise in traffic to the pumps.

- 13% increase over previous week

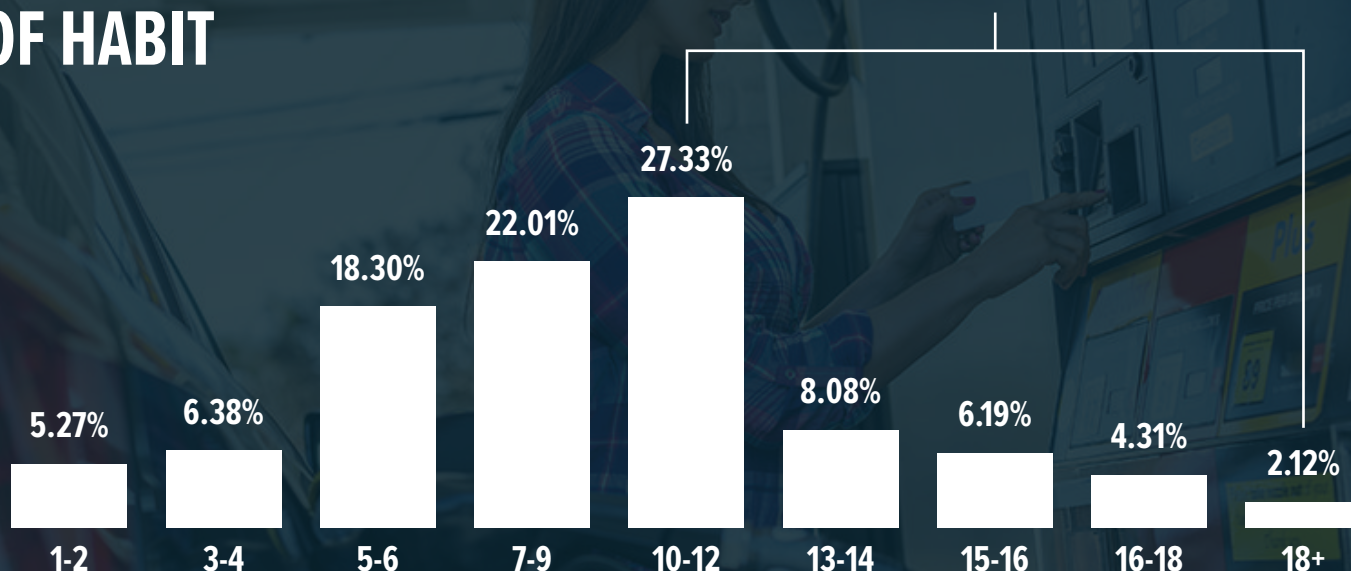


Distribution of Gas Station Visits By Week in Q1

Recommendation: Retailers can predict an increase in foot traffic in Q2, targeting customers on Memorial Day Weekend and in time for July 4.

CREATURES OF HABIT

Across Q1, nearly half of GasBuddies visited gas stations and convenience stores once a week or more.



GasBuddy Station/Store Visit Frequency in Q1

Recommendation: Retailers have a huge opportunity to move sales beyond the pump, offering customers incentives to make in-store shopping as habitual as filling up the tank.

CATCH THEM WHILE YOU CAN

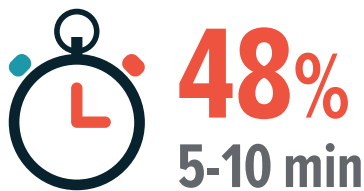
For the time-strapped consumer looking for shorter lines and faster transaction time, convenience stores are the new coffee shops, grocery stores, QSRs, liquor stores and more.

Nearly three-fourths of GasBuddy users spent more than 5 minutes at any location during Q1—good news for retailers looking to capture customers beyond the average 2-3 minutes it takes to fill a gas tank.

Recommendation: Elements ranging from well-timed and targeted mobile promotions, enticing signage, thoughtful store layout, and more can grab customer attention when it matters to drive in-store sales.



Average time to fill up tank, 2-3 minutes.



Customers who spent more than 5 minutes at any location likely visited the convenience store.



WHERE ELSE DO GASBUDDIES SHOP?

GASBUDDY USERS ARE ALSO...



BIG BOX SHOPPERS

Walmart
Sam's Club
Target



RETAIL BANK FREQUENT VISITORS

Chase
Wells Fargo



COFFEE LOVERS

Starbucks
Dunkin Donuts
Tim Horton's



GasBuddies fuel up more than just their car—retailers can capture these caffeine lovers through in-app promotions of their own coffee programs to grow a higher share of market.

About GasBuddy

GasBuddy is the technology company changing the way more than 65 million drivers connect with their Perfect Pit Stop™. Available on iOS, Android and Web, GasBuddy is the pioneer and volume leader in crowdsourced “pit stop” information, leveraging the consumer shift to mobile — as well as a massive, passionate user community — to help drivers connect with the best gas prices, closest stations, friendliest service, cleanest restrooms, tastiest coffee and much more. GasBuddy has the most accurate, real-time fuel prices at more than 140,000 unique stations in the US, Canada and Australia, and with hundreds of millions of data points, it is the most comprehensive driving companion focused on the “pit stop.” The Company’s B2B Retailer Software-as-a-Service (SaaS), known as GasBuddy Business Pages, provide Fuel Marketers and Retailers their best opportunity to maintain their station information, manage their brand, and promote to their target consumer audience.

About Cuebiq

Cuebiq is the largest provider of accurate and precise location data in the U.S. Its leading data intelligence platform analyzes location patterns of 61 million monthly active U.S. smartphone users on over 180 mobile apps, allowing businesses to glean actionable insights about real-world consumer behaviors and trends. Cuebiq provides clients geo-behavioral audiences for cross-platform ad targeting, the industry’s only SaaS based real-time campaign optimization and footfall attribution tools, and offline location analytics. Cuebiq does not collect any personally identifiable information. Its privacy-sensitive methodology has earned the company membership status with the Network Advertising Initiative (NAI), the leading self-regulatory industry association dedicated to responsible data collection and its use for digital advertising.

Methodology

From January 1 to March 31, 2017, GasBuddy and Cuebiq analyzed location visit data at more than 100 fuel and convenience store brands across the United States to understand foot traffic trends, provide geo-behavioral and consumer insights and identify the impact of key factors such as proximity and pricing on POI visits.