

FOOT TRAFFIC REPORT

for the fuel & convenience retailing industry

Q1 2018



GasBuddy



cuebiq

FOOT TRAFFIC REPORT

Q1 2018

GasBuddy and Cuebiq examined more than 32.6 million consumer visits to fuel and convenience retailers between January 1 and March 31, 2018. This data provides actionable insights into consumer behavior and the factors that influence foot traffic.

HIGHLIGHTS:

New Rankings System

This report now separates fuel and convenience brands into four categories based on the number of locations. Brands who received the most foot traffic per station in their respective categories include Ohio-based Speedway (1000+ locations), Washington-based Costco (250 – 999 locations), Kentucky-based Thorntons (50 – 249 locations) and Indiana-based Ricker's (30 – 49 locations).

Better Offerings, Better for Business

In the 1000+ location category, four of the top five are convenience brands that emphasize in-store offerings. Speedway captured the top spot in this category following improvements in their fresh food service and putting a bigger emphasis on their loyalty program.

Cumberland Farms #1 in Most States

Cumberland Farms captures the highest average footfall traffic in six states, all of New England, despite falling short of the Top 10 overall within its category of 250 to 999 locations. Wawa comes in second with five states, including hotly-contested Pennsylvania. Costco and Kroger tie for third place with four states, and Speedway and Pilot tie for fifth place with three each.

Hump Day is the Busiest Pump Day

Wednesday at 5 p.m. was the busiest time time for fuel and convenience brands, followed by Friday from 4-6 p.m. Busiest days overall include Friday (1), Thursday (2) and Wednesday (3).

Consumers Reward Quality with More Visits

Findings indicate that strong correlation exists between below-average ratings in the GasBuddy app and below-average foot traffic. For example, stations with below-average customer service ratings experienced 15 percent less visits than the industry average. Conversely, stations with above-average customer service ratings experienced an uplift of nearly 7 percent, showing that today's consumers actively seek quality retail experiences.

FOOT TRAFFIC RANKINGS

Which brands captured the highest average footfall per station?

GasBuddy examined more than 32.6 million consumer trips to gas stations and convenience stores in Q1 2018. The following brands attracted the highest average footfall within their respective categories.

The Rankings

- 1,000+ locations
- 250 – 999 locations
- 50 – 249 locations
- 30 – 49 locations

Methodology

The footfall ratio equals average footfall per location / average footfall for the industry. A brand on par with the industry average would have a ratio of 1.0.



TOP 10

1,000+ Locations

1 **Speedway**

2 **ARCO**

3 **7-Eleven**

4 **Circle K**

5 **Murphy USA**

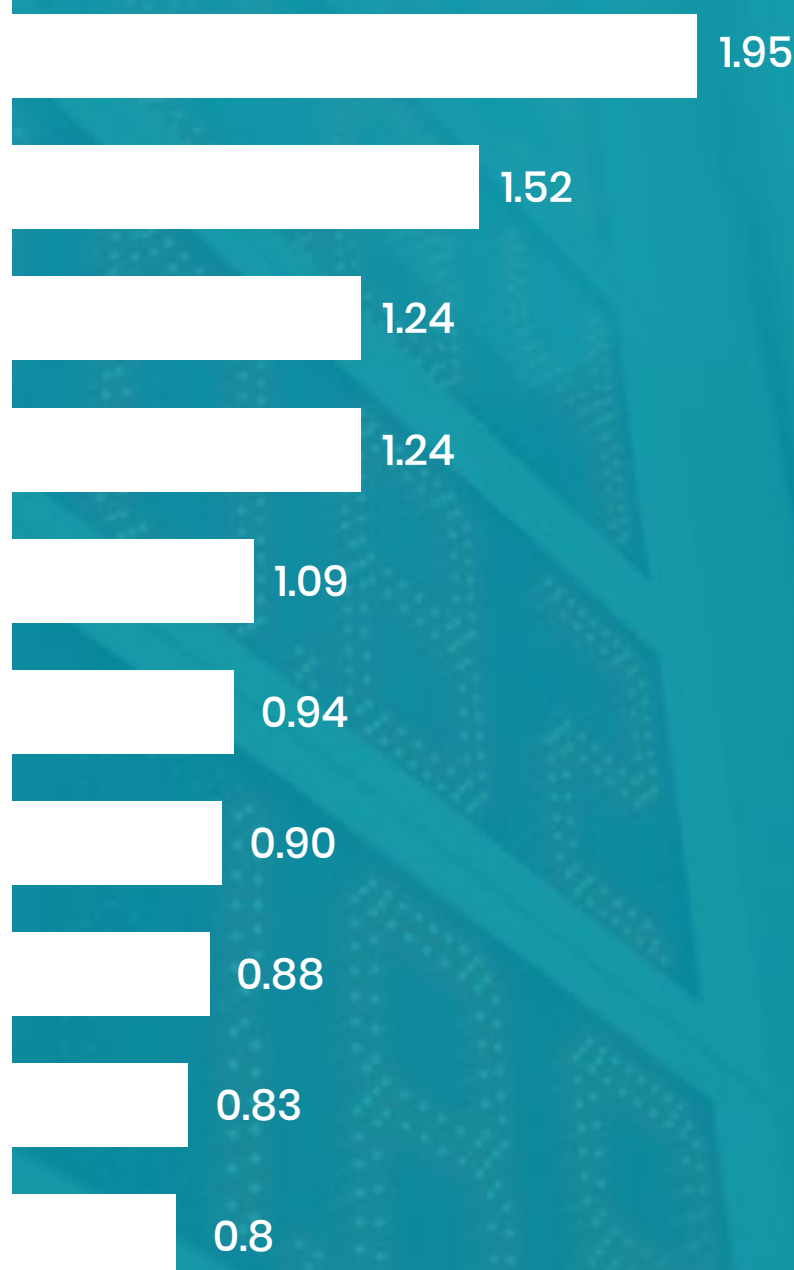
6 **76**

7 **Shell**

8 **Mobil**

9 **Marathon**

10 **Chevron**



Methodology

The footfall ratio equals average footfall per location / average footfall for the industry. A brand on par with the industry average would have a ratio of 1.0.

TOP 10

250 – 999 Locations

1 **Costco**

2 **Kroger**

3 **Pilot**

4 **Wawa**

5 **Love's**

6 **Sam's Club**

7 **Sheetz**

8 **RaceTrac**

9 **QuikTrip**

10 **Safeway**

3.62

2.74

2.46

2.24

2.22

2.10

1.98

1.98

1.57

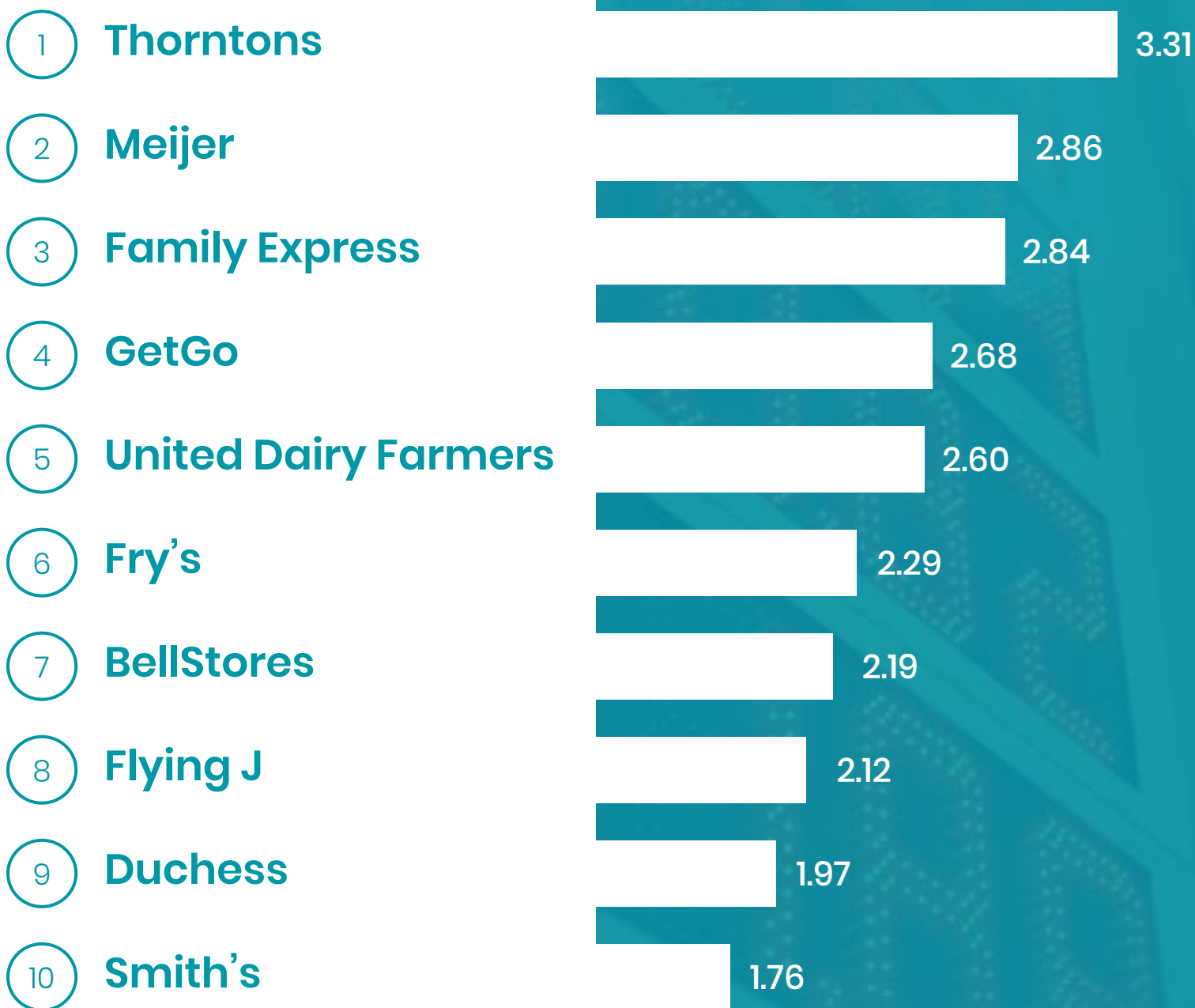
1.51

Methodology

The footfall ratio equals average footfall per location / average footfall for the industry. A brand on par with the industry average would have a ratio of 1.0.

TOP 10

50 - 249 Locations

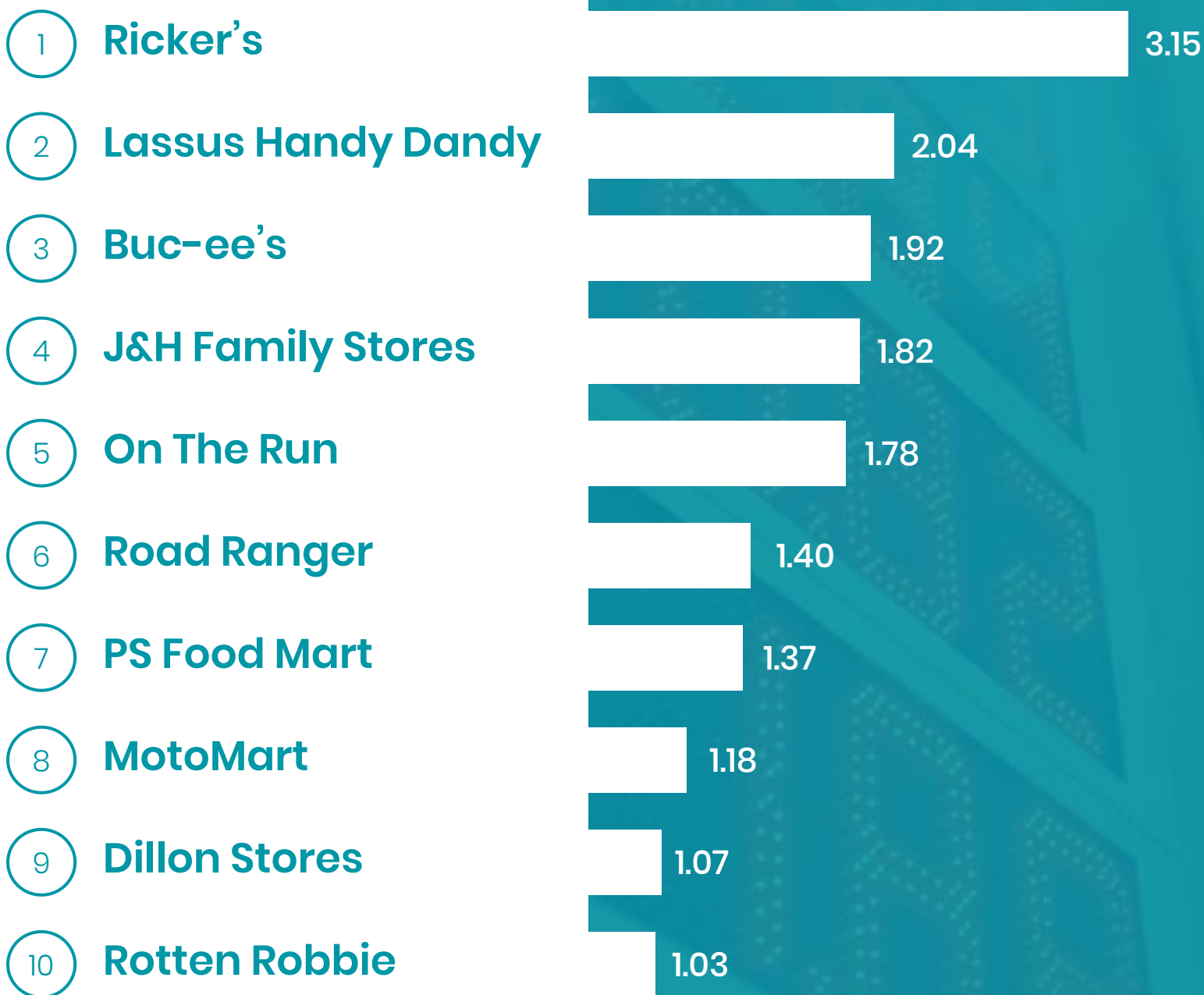


Methodology

The footfall ratio equals average footfall per location / average footfall for the industry. A brand on par with the industry average would have a ratio of 1.0.

TOP 10

30 - 49 Locations

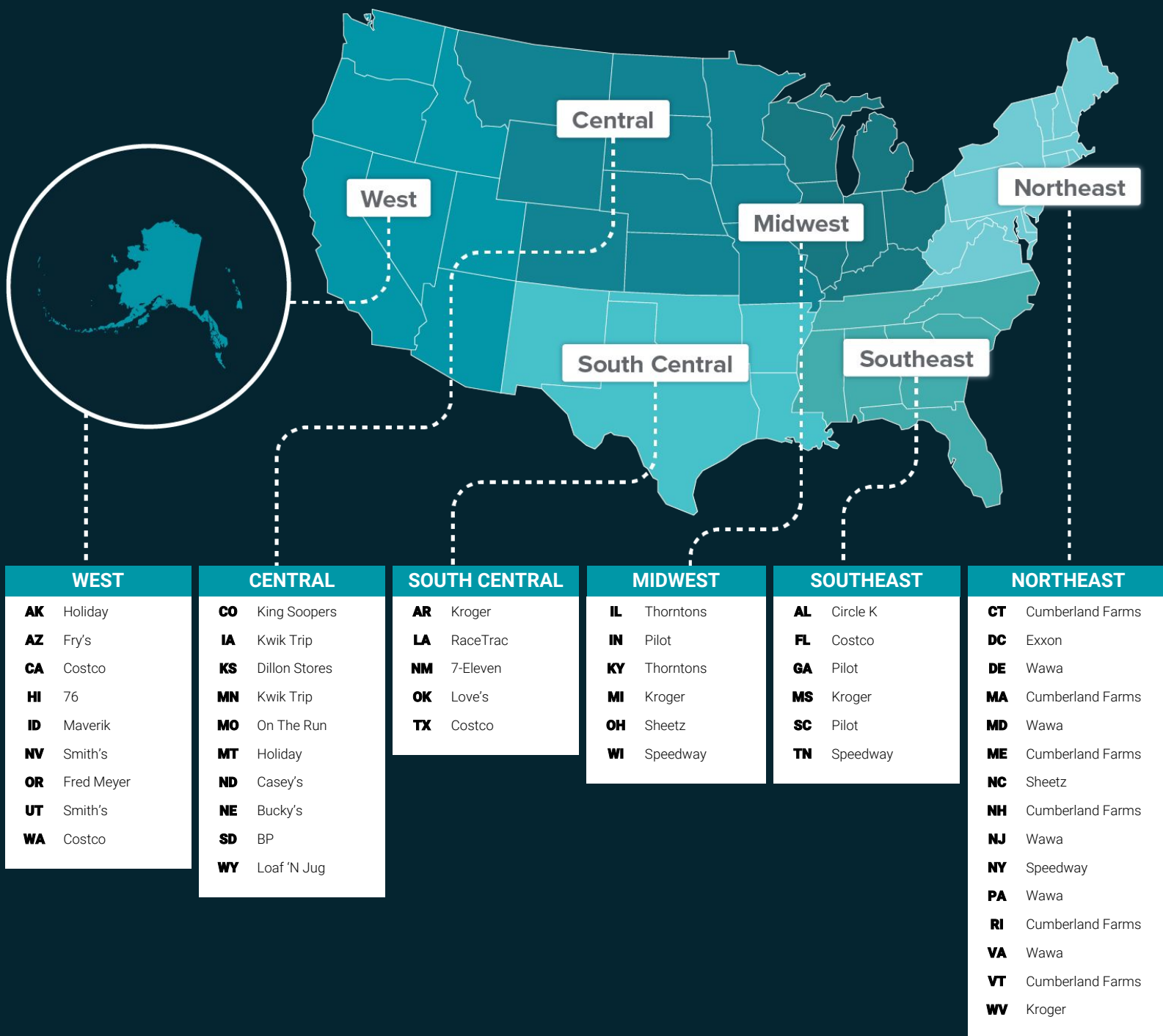


Methodology

The footfall ratio equals average footfall per location / average footfall for the industry. A brand on par with the industry average would have a ratio of 1.0.

FOOT TRAFFIC RANKINGS BY STATE

Which brands captured the highest average footfall in each state?



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

WHEN DO CONSUMERS VISIT GAS STATIONS?

Location data from Q1 2018 reveals that lunchtime and the end of the workday were especially busy times for gas stations and convenience stores. Thursday received a comparatively large share of traffic from early-morning to noon, while Wednesday and Friday received the largest share from noon to late-evening.

Day	0	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	Grand Total
Sunday	0.15%	0.11%	0.08%	0.06%	0.05%	0.07%	0.11%	0.18%	0.31%	0.47%	0.64%	0.79%	0.96%	0.95%	0.91%	0.87%	0.83%	0.78%	0.69%	0.55%	0.42%	0.30%	0.21%	0.14%	10.61%
Monday	0.10%	0.07%	0.06%	0.05%	0.08%	0.16%	0.30%	0.50%	0.58%	0.63%	0.72%	0.88%	1.02%	0.97%	0.95%	1.00%	1.04%	1.04%	0.86%	0.64%	0.48%	0.34%	0.23%	0.15%	12.87%
Tuesday	0.09%	0.06%	0.05%	0.05%	0.08%	0.18%	0.34%	0.57%	0.64%	0.67%	0.74%	0.90%	1.05%	0.98%	0.97%	1.04%	1.10%	1.14%	0.96%	0.74%	0.57%	0.41%	0.27%	0.18%	13.80%
Wednesday	0.11%	0.07%	0.06%	0.06%	0.09%	0.20%	0.39%	0.65%	0.73%	0.74%	0.81%	0.99%	1.15%	1.09%	1.08%	1.21%	1.34%	1.39%	1.16%	0.88%	0.67%	0.47%	0.30%	0.20%	15.85%
Thursday	0.12%	0.08%	0.07%	0.07%	0.11%	0.23%	0.45%	0.75%	0.82%	0.84%	0.91%	1.11%	1.29%	1.17%	1.15%	1.19%	1.20%	1.23%	1.04%	0.80%	0.61%	0.44%	0.30%	0.20%	16.19%
Friday	0.13%	0.09%	0.07%	0.07%	0.10%	0.20%	0.39%	0.65%	0.74%	0.81%	0.91%	1.11%	1.28%	1.22%	1.20%	1.27%	1.32%	1.32%	1.14%	0.87%	0.66%	0.50%	0.36%	0.25%	16.65%
Saturday	0.16%	0.11%	0.08%	0.06%	0.07%	0.10%	0.18%	0.31%	0.51%	0.74%	0.94%	1.09%	1.16%	1.13%	1.09%	1.05%	1.01%	0.96%	0.89%	0.73%	0.58%	0.46%	0.34%	0.25%	14.03%
Grand Total	0.87%	0.60%	0.47%	0.42%	0.58%	1.13%	2.16%	3.61%	4.34%	4.91%	5.68%	6.86%	7.91%	7.51%	7.35%	7.64%	7.83%	7.87%	6.75%	5.21%	3.98%	2.93%	2.02%	1.37%	100.00%

Numbers represent the percentage of weekly foot traffic

Recommendation: Despite high levels of foot traffic during lunch and evening hours, 31% of respondents in a recent GasBuddy survey said they purchase breakfast at gas stations and convenience stores while 26% purchase lunch, 9% purchase dinner, and 79% purchase snacks.

While the industry as a whole has made enormous progress in the foodservice category, the same survey revealed a perception gap. Sixty percent of respondents said they purchase food from gas stations and convenience stores compared to 86% who said they purchase food at quick-service restaurants. This highlights the need for convenience retailers to invest in effective and relevant marketing efforts. Similarly, cleanliness and ambiance should be a top concern since dirty forecourts and restrooms can undermine investments in foodservice.

CATCH THEM WHILE YOU CAN

During Q1 2018, more than half (53%) of visits to gas stations and convenience stores lasted less than 5 minutes.



5 minutes or less **52.71%**

5 - 10 minutes **26.70%**

10 - 15 minutes **9.28%**

15 minutes or more **11.32%**

TOP 5 BUSIEST DAYS & TIMES



BUSIEST DAYS



LEAST BUSY TIMES DURING WORK WEEK (Mon - Fri, 8am - 8pm)

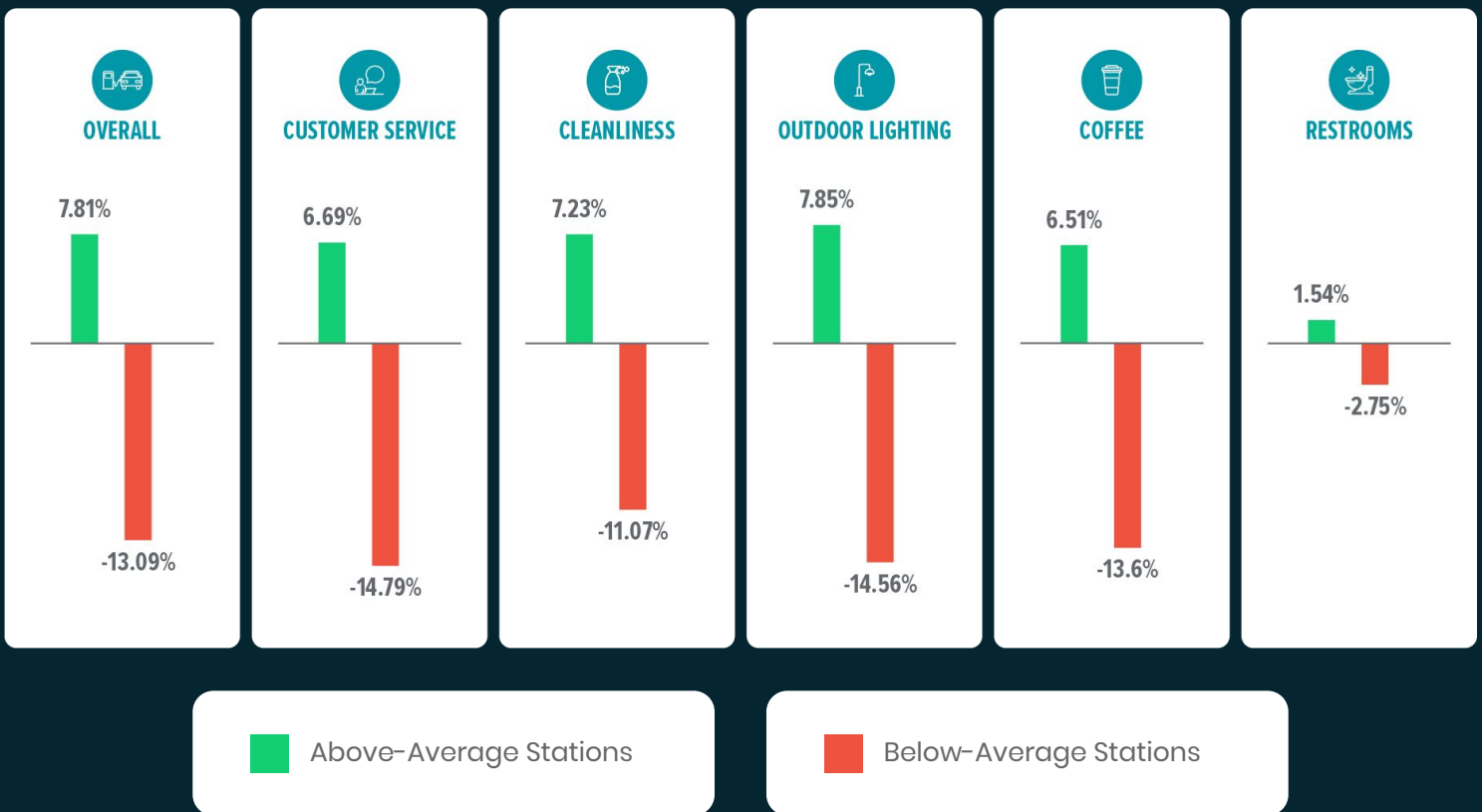


RATINGS AND FOOT TRAFFIC

How do above and below-average stations fare in terms of foot traffic?

More than 1.85 million individual ratings were submitted by GasBuddy users in Q1 2018. This real-time consumer feedback not only provides retailers with insight into the customer experience at their stores, but is reflective of the fact that today's customers care about quality—and tend to vote with their feet.

We conducted an analysis to determine how the foot traffic at stations with above and below-average ratings differs from the industry average.



Analysis: Today's consumers have many choices when deciding where to refuel or purchase a snack, and they prioritize quality. Dirty forecourts, messy stores, unclean restrooms, poor customer service—these simple mistakes have a large impact on foot traffic. For convenience retailers, it can undermine investments in foodservice, hot dispensed beverages, and indoor and outdoor seating. For fuel retailers, it can limit how effective stations are at selling gasoline and diesel.

Are you interested in obtaining these insights for your stations?

The Reputation Management solution from GasBuddy Business Pages can help.
For more information, visit business.gasbuddy.com

About GasBuddy

GasBuddy is a smartphone app connecting drivers with their Perfect Pit Stop™. GasBuddy is the leader in crowdsourced information to help drivers find the best gas prices, closest stations, friendliest service, cleanest restrooms, tastiest coffee and much more. GasBuddy is the leading source for the most accurate, real-time fuel prices at more than 140,000 gas stations in the U.S and Canada. 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 a next generation location intelligence and measurement company, leveraging the largest database of accurate and precise location data in the U.S. to help marketers map and measure the consumer journey. Its leading data intelligence platform analyzes location patterns of 61 million monthly anonymous, opted-in U.S. smartphone users on over 180 mobile apps, allowing businesses to glean actionable insights about real-world consumer behaviors and trends. Cuebiq's SaaS platform provides clients offline location analytics, real-time campaign optimization and footfall attribution, and geo-behavioral audiences for cross-platform ad targeting. Cuebiq does not collect any personally identifiable information. Its privacy-compliant methodology is at the forefront of industry standards and 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. Cuebiq is headquartered in New York with offices in San Francisco, Chicago, Italy, and China.

Methodology

From January 1 to March 31, 2018, GasBuddy 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 ratings and reviews on POI visits. To be considered a "visit," a user must be within 30 meters of a fuel pump for between 2 and 30 minutes.