

FOOT TRAFFIC REPORT

for the fuel & convenience retailing industry

Q1 2019



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GasBuddy examined more than 20.3 million consumer visits to fuel and convenience retailers between January 1 and March 31, 2019. This data provides actionable insights into consumer behavior and the factors that influence foot traffic.

HIGHLIGHTS:

More Americans Moving Beyond the Pumps and Into the Stores

Americans are spending more time at gas stations, venturing into the convenience store and purchasing items including fresh food, beverages and consumer packaged goods. More than half (55%) of consumer visits to fuel and convenience retailers lasted for longer than five minutes during Q1. This exceeds the average two to three minutes it takes to refuel a vehicle and reflects the industry's emphasis on quality in-store offers, as well as reaffirming the findings in GasBuddy's Foodservice and Consumer Habits Survey, revealing that 60% of consumers purchase food and beverages at convenience stores.

Costco Claims the Top Spot

Washington-based Costco (250 - 999 locations) captured the most foot traffic per station of any brand in any segment—more than four-and-a-half times the industry average. Other segment winners include Ohio-based Speedway (1,000+ locations), Kentucky-based Thorntons (50 - 249 locations), and Texas-based Buc-ee's (30 - 49 locations).

Fridays are the Busiest for Fueling

Friday was the busiest day for fuel and convenience retailers in Q1, followed by Saturday (2) and Thursday (3). The four busiest times also took place on Friday—5:00pm, 4:00pm, 12:00pm, and 3:00pm—followed by Saturday at 12:00pm in fifth place.

Kroger Wins the Most States

Ohio-based Kroger captured the highest average footfall in six states—the most of any fuel or convenience retailer. Wawa came in a close second with five states, and Cumberland Farms and Costco tied with four wins each.

Well-Lit Stations Drive Visits

Today's customers have many choices, and they prefer to refuel at stations that are well-lit in the evenings and early morning. During Q1, stations with above-average outdoor lighting ratings drove 25.9% more visits than their below average competitors.

FOOT TRAFFIC RANKINGS

Which brands captured the highest average footfall per station?

GasBuddy examined more than 20.3 million consumer visits to gas stations and convenience stores during Q1 2019. The following brands attracted the highest average footfall within their respective segments.

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.

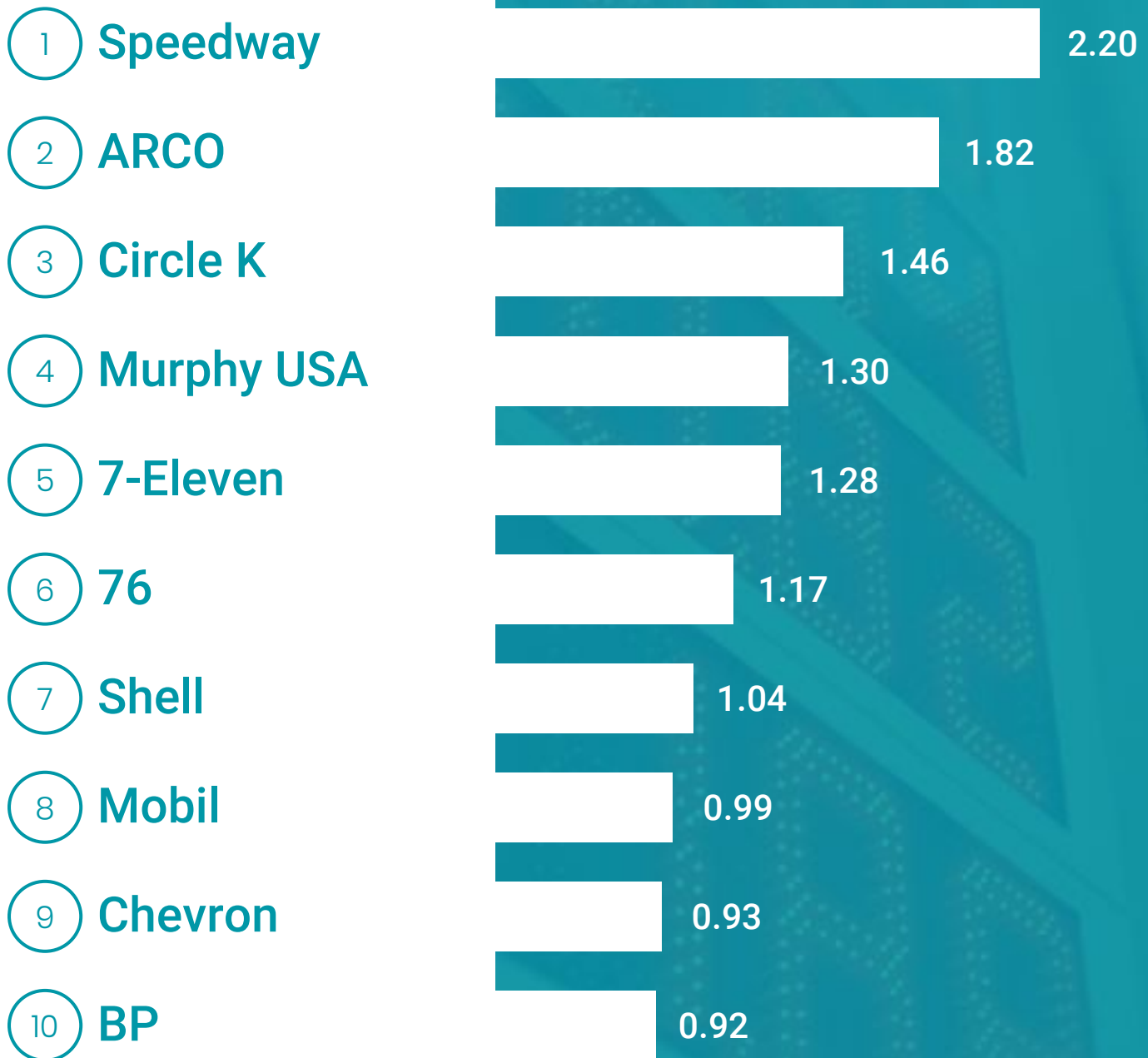


TOP 10

1,000+ Locations

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.



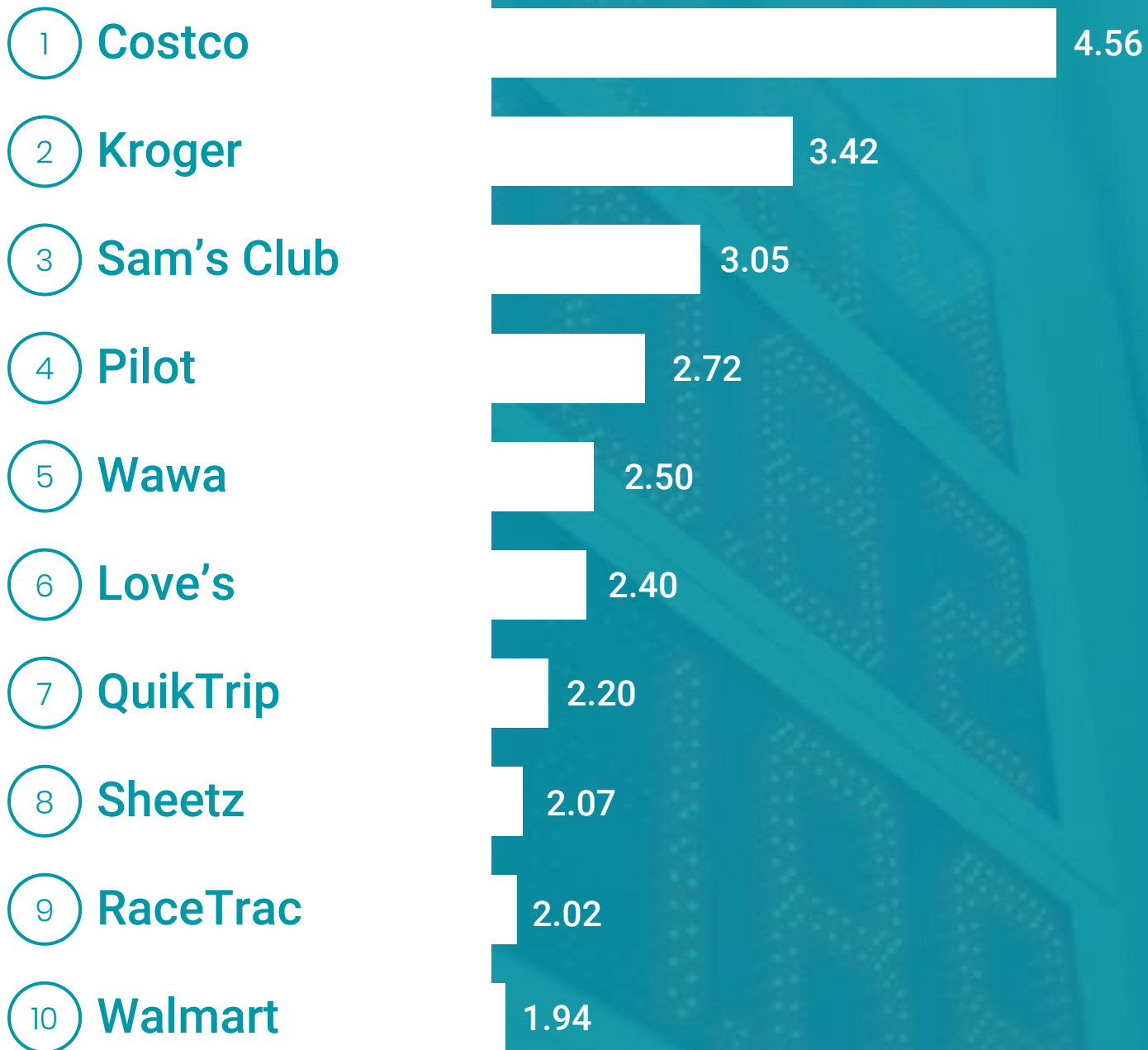
Data from January 1 to March 31, 2019

TOP 10

250 - 999 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.



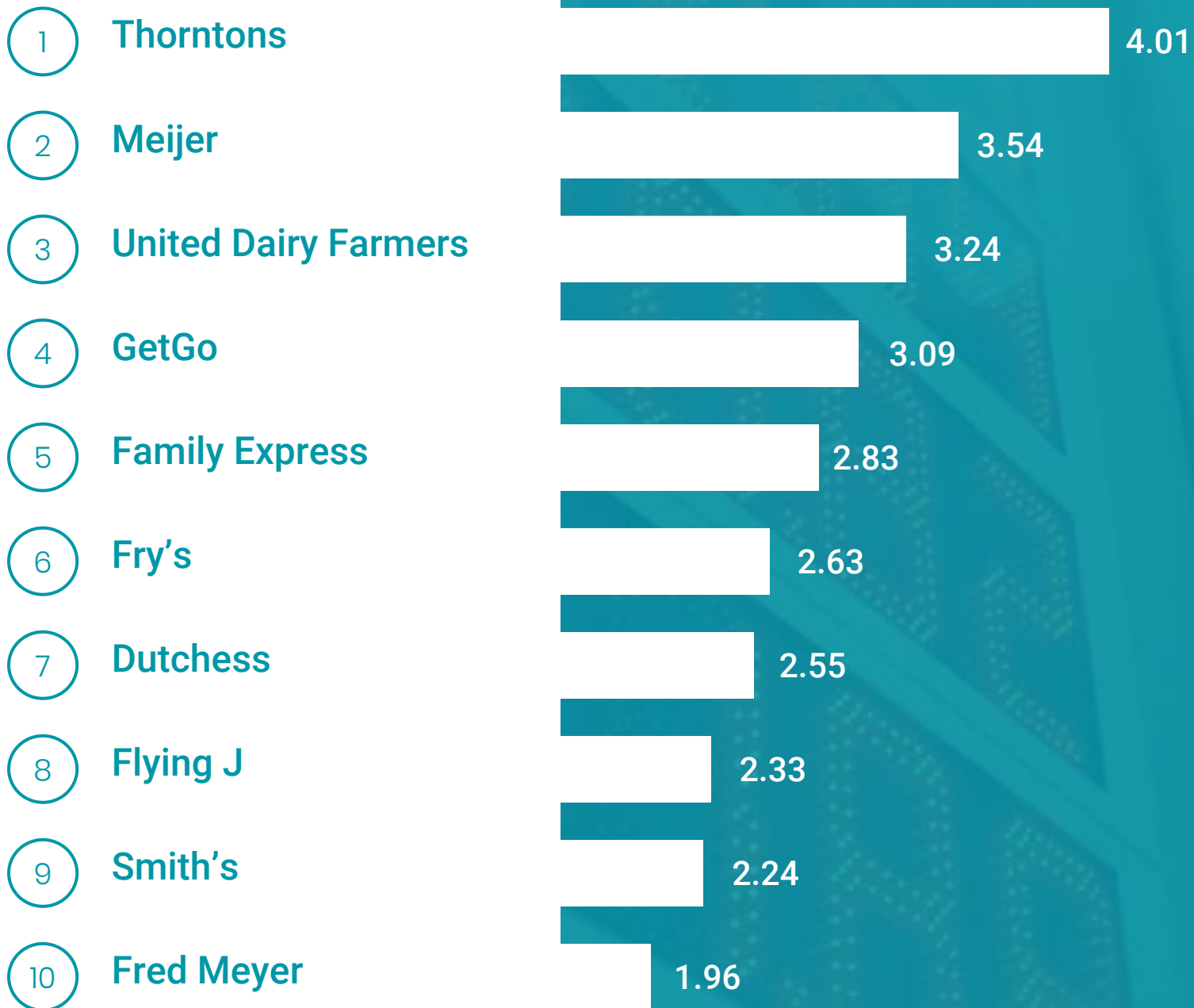
Data from January 1 to March 31, 2019

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.



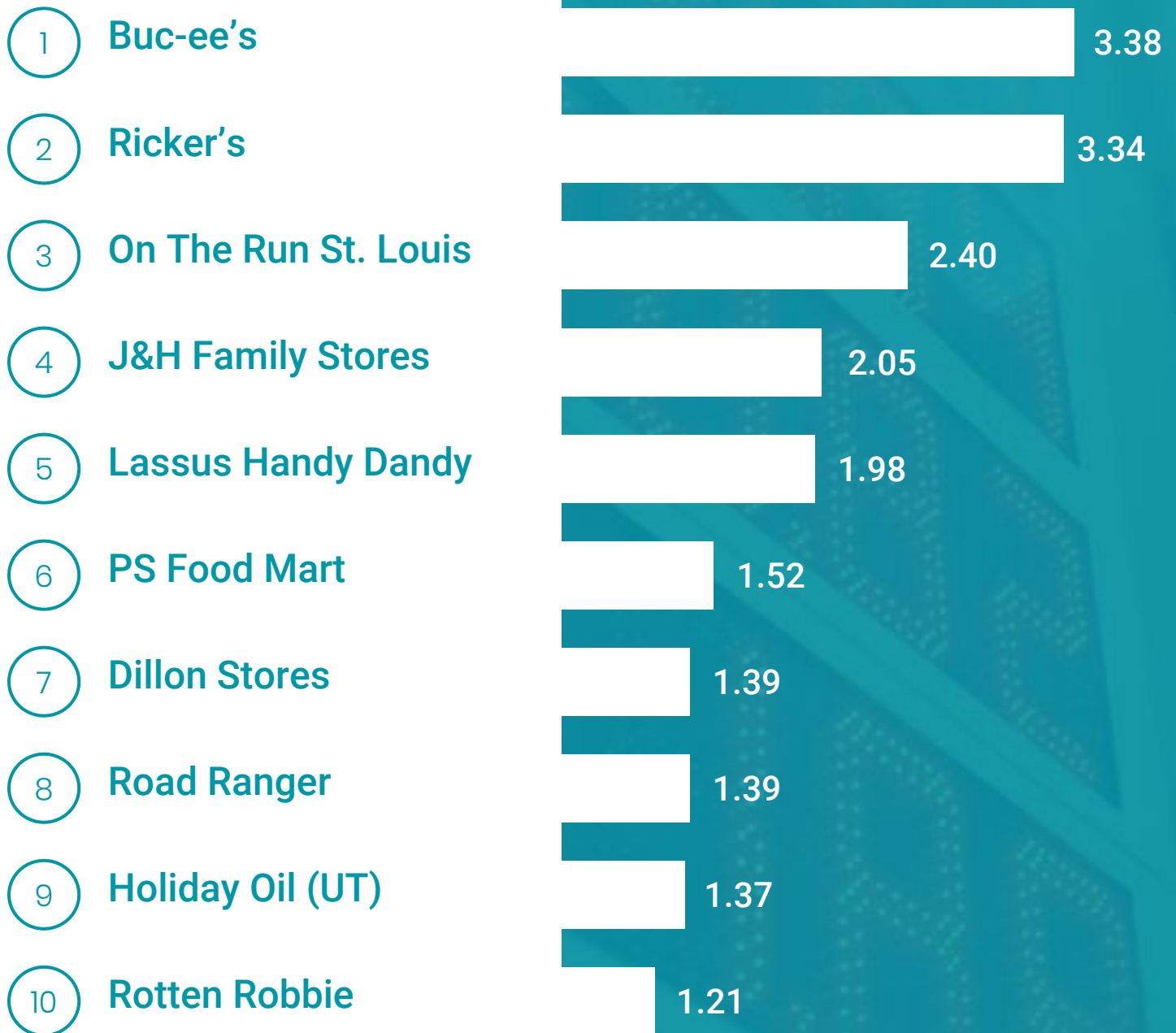
Data from January 1 to March 31, 2019

TOP 10

30 - 49 Locations

Methodology

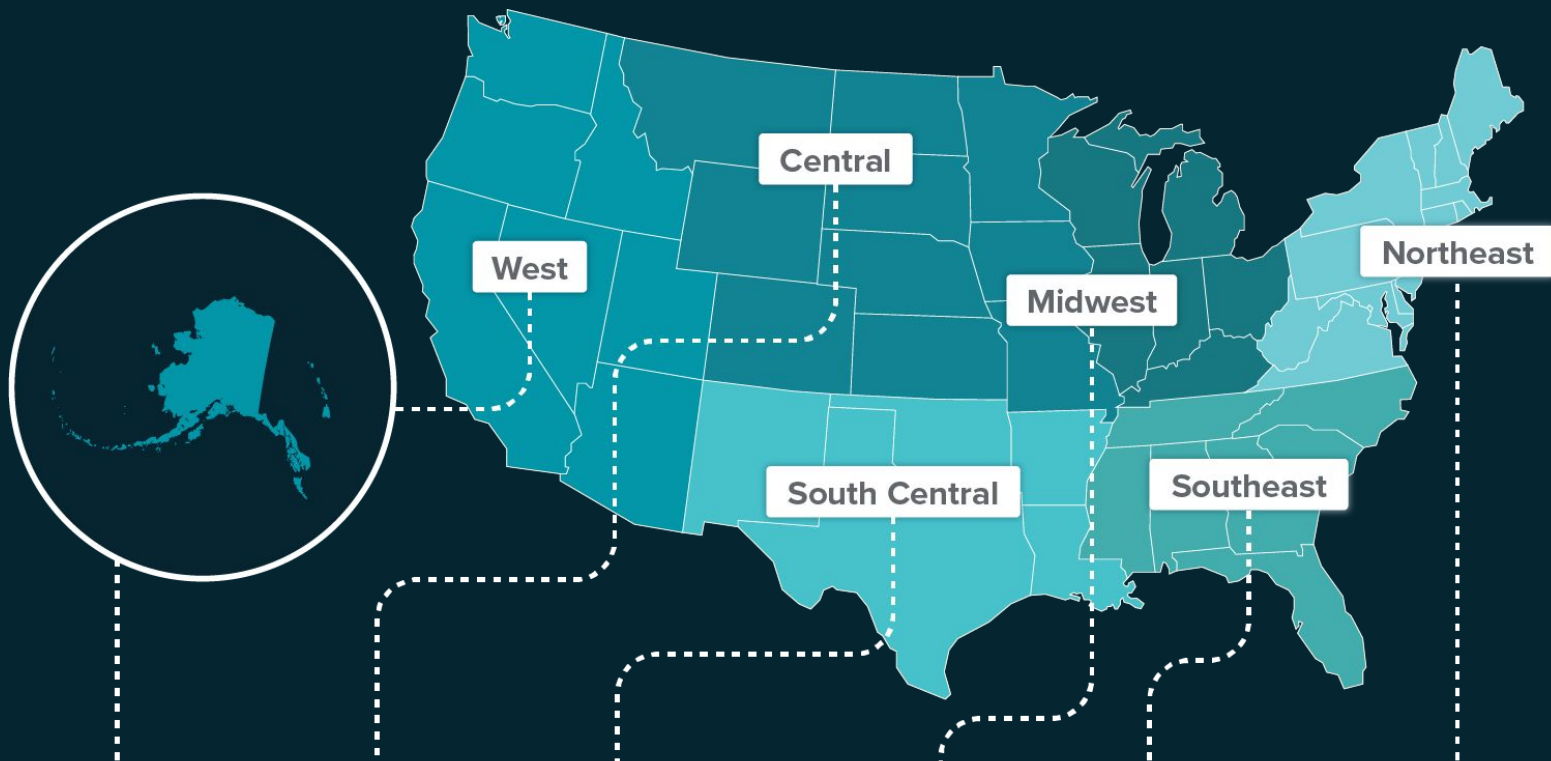
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Data from January 1 to March 31, 2019

FOOT TRAFFIC RANKINGS BY STATE

Which brands captured the highest average footfall in each state?



WEST		CENTRAL		SOUTH CENTRAL		MIDWEST		SOUTHEAST		NORTHEAST	
AK	Holiday	CO	King Soopers	AR	Kroger	IL	Thorntons	AL	Circle K	CT	Cumberland Farms
AZ	Fry's	IA	Kwik Trip	LA	RaceTrac	IN	Kroger	FL	Costco	DC	Exxon
CA	Costco	KS	Dillon Stores	NM	Circle K	KY	Kroger	GA	Pilot	DE	Wawa
HI	76	MN	Kwik Trip	OK	Love's	MI	Kroger	MS	Kroger	MA	Pride
ID	Maverik	MO	QuikTrip	TX	Costco	OH	Sam's Club	SC	Pilot	MD	Wawa
NV	Smith's	MT	Holiday			WI	Kwik Trip	TN	Speedway	ME	Cumberland Farms
OR	Fred Meyer	ND	Casey's							NC	Sheetz
UT	Smith's	NE	Bucky's							NH	Cumberland Farms
WA	Costco	SD	BP							NJ	Wawa
		WY	Maverik							NY	Speedway
										PA	Wawa
										RI	Cumberland Farms
										VA	Wawa
										VT	Mobil
										WV	Kroger

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

WHEN DO GASBUDDIES VISIT GAS STATIONS?

Fuel and convenience retailers are destinations for more than the early-morning coffee run. During Q1 2019, afternoons and early evenings received the highest share of traffic—with Friday, Saturday, and Thursday being the most popular days.

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
SUN	0.20%	0.14%	0.10%	0.07%	0.06%	0.08%	0.12%	0.21%	0.35%	0.53%	0.73%	0.89%	1.08%	1.08%	1.04%	0.99%	0.95%	0.90%	0.82%	0.69%	0.54%	0.38%	0.26%	0.17%	12.38%
MON	0.10%	0.06%	0.05%	0.05%	0.08%	0.15%	0.28%	0.46%	0.57%	0.64%	0.73%	0.90%	1.05%	0.98%	0.95%	0.99%	1.02%	1.02%	0.87%	0.68%	0.50%	0.36%	0.24%	0.15%	12.88%
TUE	0.11%	0.08%	0.06%	0.06%	0.08%	0.16%	0.31%	0.51%	0.62%	0.67%	0.76%	0.94%	1.10%	1.01%	0.99%	1.04%	1.09%	1.11%	0.95%	0.75%	0.57%	0.41%	0.27%	0.17%	13.82%
WED	0.11%	0.07%	0.06%	0.05%	0.08%	0.17%	0.33%	0.54%	0.64%	0.70%	0.78%	0.97%	1.13%	1.05%	1.02%	1.06%	1.11%	1.13%	0.99%	0.77%	0.60%	0.42%	0.28%	0.18%	14.24%
THU	0.11%	0.07%	0.06%	0.06%	0.09%	0.17%	0.33%	0.55%	0.65%	0.71%	0.79%	0.98%	1.14%	1.05%	1.03%	1.08%	1.13%	1.16%	1.03%	0.82%	0.63%	0.46%	0.31%	0.20%	14.61%
FRI	0.13%	0.09%	0.07%	0.06%	0.09%	0.18%	0.35%	0.59%	0.72%	0.79%	0.90%	1.11%	1.29%	1.23%	1.21%	1.26%	1.30%	1.31%	1.18%	0.96%	0.75%	0.58%	0.42%	0.29%	16.86%
SAT	0.19%	0.13%	0.10%	0.07%	0.07%	0.11%	0.19%	0.33%	0.54%	0.78%	0.99%	1.16%	1.23%	1.21%	1.17%	1.13%	1.08%	1.04%	0.96%	0.81%	0.66%	0.53%	0.40%	0.29%	15.17%
Grand Total	0.95%	0.64%	0.50%	0.42%	0.55%	1.02%	1.91%	3.19%	4.09%	4.82%	5.68%	6.95%	8.02%	7.61%	7.41%	7.55%	7.68%	7.67%	6.80%	5.48%	4.25%	3.14%	2.18%	1.45%	100.00%

Numbers represent the percentage of weekly foot traffic

Reach consumers where they're at

It's not enough to have a great location. Today's consumers rely on digital location platforms—GasBuddy, Google Maps, Apple Maps, and more—to find local businesses during their path to purchase. Brands who don't exist online, or have incorrect hours and other information, miss the opportunity to drive traffic from these platforms.

Major retailers rely on GasBuddy Listings Management to send their fuel prices, station details, and other information to major publishers such as Google, Waze, Apple, and in-dash navigation systems. Contact pages@gasbuddy.com for a demonstration.

Drive consumers from the pump to the store

Whether it's afternoon snacks or the morning coffee run, CPG companies have an opportunity to reach customers who are heading to—or at—the pumps. According to a recent GasBuddy report, more than 81% of female survey respondents said mobile ads offering deals for c-store products would influence their decision to visit a station.

We know what works. Contact advertising@gasbuddy.com to learn why major retailers rely on GasBuddy Advertising to drive measurable visit uplift.



CATCH THEM WHILE YOU CAN

During Q1 2019, more than half (55%) of visits to gas stations and convenience stores lasted for more than 5 minutes.



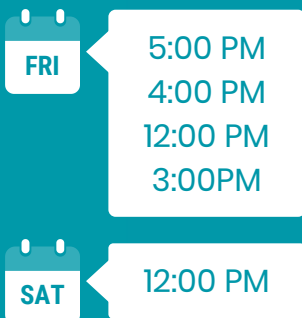
< 5 MINUTES

45%

> 5 MINUTES

55%

TOP 5 BUSIEST DAYS & TIMES

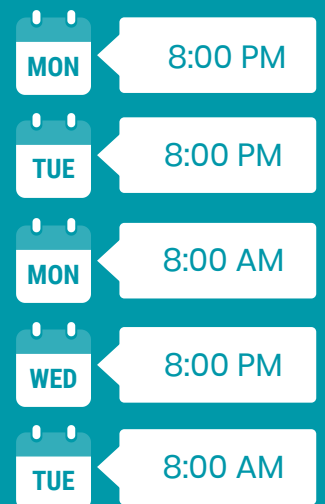


BUSIEST DAYS



LEAST BUSY TIMES DURING WORK WEEK

(Mon - Fri, 8am - 8pm)



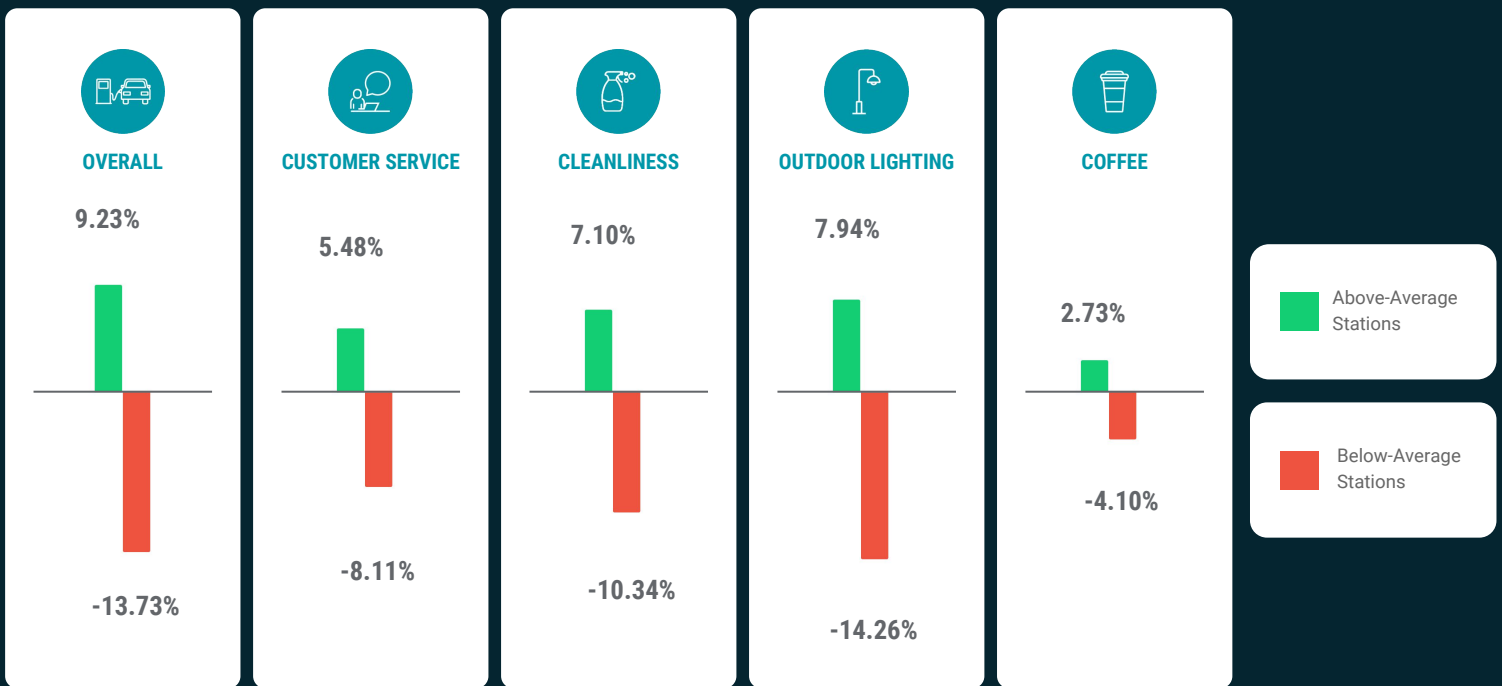
RATINGS AND FOOT TRAFFIC

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

More than 2 million individual ratings were submitted by GasBuddy users between January 1 and March 31, 2019. 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 demand quality.

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

Top 5



Analysis: Today's convenience retailers do more than refuel our vehicles. They're destinations for artisan coffee, made-to-order foodservice, and more. But consumers have many choices from the cross-channel competitors to the next station down the street. They demand quality.

Retailers who monitor real-time customer ratings across their brand can quickly identify locations that fall short of brand standards and take corrective action. This information also helps fill the gaps between mystery shops.

Are you interested in obtaining these insights for your stations?

We'd like to show you what we know. Contact us at pages@gasbuddy.com for more information.

About GasBuddy

GasBuddy is a company that connects drivers with their Perfect Pit Stop. As the leading source for crowdsourced, real-time fuel prices at more than 150,000 gas station convenience stores in the U.S., Canada and Australia, millions of drivers use the GasBuddy app and website every day to find gas station convenience stores based on fuel prices, location and ratings/reviews. GasBuddy's first-of-its-kind fuel savings program, Pay with GasBuddy, has saved Americans more than \$6 million at the pumps since its launch in 2017. The company's business solutions suite, GasBuddy Business Pages, provides Fuel Marketers and Retailers their best opportunity to maintain their station information, manage their brand, and promote to their target consumer audience. For more information, visit <http://www.gasbuddy.com>.

Methodology

From January 1, 2019 to March 31, 2019 GasBuddy analyzed anonymous, aggregated location visit data at more than 100 fuel and convenience store brands and retail locations 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," users must be within 30 meters of a fuel pump for between 2 and 30 minutes.

Cuebiq is a leading location intelligence and consumer insights company leveraging the largest database of accurate and precise location data in the U.S. Its data intelligence platform analyzes anonymous location patterns to allow businesses to glean actionable insights and better understand the offline consumer journey. Cuebiq's SaaS platform provides clients offline location analytics, real-time campaign optimization and footfall attribution, as well as geo-behavioral audiences for cross-platform ad targeting. Cuebiq is headquartered in New York with offices in San Francisco, Chicago, Italy, and China. Cuebiq is also a leader in utilizing data and insights in the service of a variety of causes through its "Data for Good" initiative. The company shares location intelligence with researchers at top universities and nonprofit organizations to drive innovation for causes such as improving quality of life in underserved communities, natural disaster response, and smart city development.