

# FOOT TRAFFIC REPORT & SUMMER DRIVING TRENDS

for the fuel & convenience store industry

————— **Q3 2017** —————



**GasBuddy**



**OPIS**  
By IHS Markit



**cuebiq**

# FOOT TRAFFIC REPORT & SUMMER DRIVING TRENDS, Q3 2017

Between July 1 and September 30, GasBuddy and Cuebiq examined 33.4 million consumer trips to the pumps and convenience stores. This quarter saw some shifts in consumer behavior, with the summer season leading to road trips and frequent driving.

## Highlights:

### Summer Was a Time to Shop and Travel

The first three weeks of July were the most highly-trafficked, and the final week of September was the least. From Q2 to Q3, the top categories for uplift in foot traffic were 1) Leisure - 59%, 2) Gas Stations - 56%, and 3) Economy Hotels - 51%.

### Good Restrooms are Good for Business

With drivers taking to the roads for summer trips, there was a strong correlation between restroom quality and foot traffic. Stations near interstates with above-average ratings on GasBuddy saw a 33% increase in foot traffic over those with below-average ratings.

### Meijer Captures the Top Spot

Previously ranked second during Q2 2017 for the highest ratio of footfall per station, Meijer takes the top spot for Q3—with more than 4 times the industry average. The previous winner, Ricker's, moves into a close second place.

### The Highest Volume Retailers in Q3

OPIS tracks fuel transactions at gas stations throughout the United States each week and has compiled the most efficient players in the third quarter. The efficiency rankings are calculated by dividing market share by outlet share. A higher number indicates higher per store volumes. Brands that were at the top of the OPIS efficiency scorecard also scored high in overall ratings from GasBuddy users.

### Less Repeat Visits, More Dwell Time

As GasBuddy users traveled away from home, the percentage of users who visited stores once a week or more decreased 4.5% during Q3. With stops to get snacks, use restrooms, and refuel, dwell time increased slightly with 70% of users spending more than 5 minutes at a store.

# GasBuddy examined nearly 33.4 million consumer trips to gas stations and c-stores in Q3 2017.

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

## TOP 10 -----

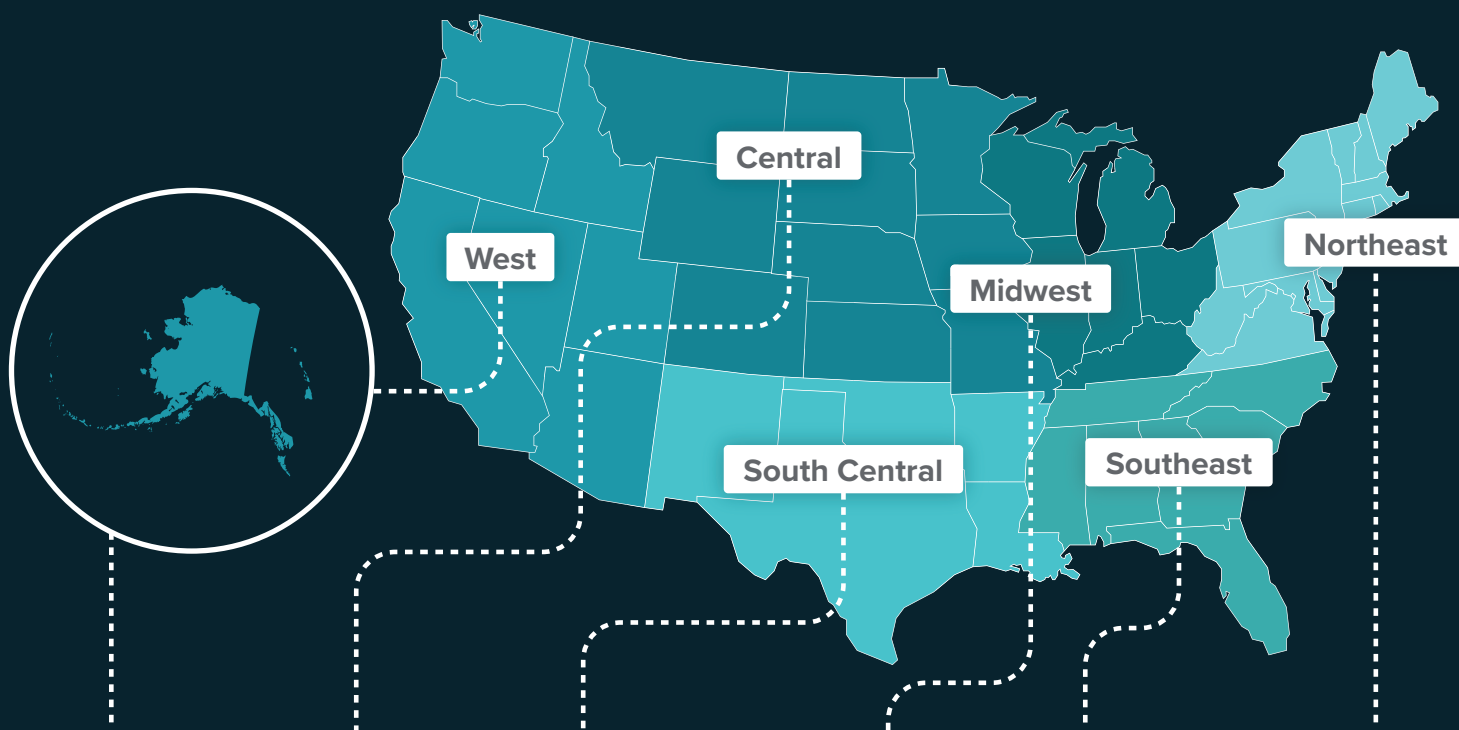
Q2	Q3	
↑ 2	1	<b>Meijer</b> (192 locations, IL, IN, KY, MI, OH, WI)
↓ 1	2	<b>Ricker's</b> (49 locations measured, Indiana)
3	3	<b>Family Express</b> (68 locations, Indiana)
4	4	<b>Costco</b> (447 locations, national)
5	5	<b>Thorntons</b> (173 locations, FL, IL, IN, KY, OH, TN)
↑ 8	6	<b>GetGo</b> (198 locations, IN, WV, PA, OH, MD)
7	7	<b>Kroger</b> (961 locations, 17 states)
↑ 9	8	<b>Pilot</b> (420 locations, national)
↓ 6	9	<b>United Dairy Farmers</b> (161 locations, IN, KY, OH)
New	10	<b>Bell Stores</b> (54 locations, Ohio)

## Meijer captures the number-one spot and Ricker's moves into second.

The loyal GasBuddy customer base brought in more than 4x the industry average footfall per location in Q3.



# BRANDS WITH HIGHEST AVERAGE FOOTFALL, BY STATE



West	Central	South Central	Midwest	Southeast	Northeast
AK Holiday	CO King Soopers	AR Kroger	IL Thorntons	AL MAPCO	CT Cumberland Farms
AZ Fry's	IA Kum & Go	LA Race Trac	IN Pilot	FL Costco	DC Exxon
CA Costco	KS Dillon Stores	NM 7-Eleven	KY Pilot	GA Pilot	DE Wawa
HI 76	MN Kwik Trip	OK 7-Eleven	MI Meijer	MS Kroger	MA Speedway
ID Maverik	MO On The Run	TX Costco	OH Sheetz	SC QuikTrip	MD Wawa
NV Smith's	MT Exxon		WI Speedway	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 Conoco				NJ QuickChek
	WY Maverik				NY Speedway
					PA Wawa
					RI Cumberland Farms
					VA Sheetz
					VT Mobil
					WV Sheetz

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

# GOOD RESTROOMS ARE GOOD FOR BUSINESS

Not only is restroom quality the number one reason for negative reviews on GasBuddy, but it's a concern for summer drivers. According to a recent survey, 64 percent of respondents said one of their worst fears about a road trip is the need to use the restroom and not knowing when the next one will be available. We dug deeper to explore the relationship between restroom ratings and foot traffic.

## TOP 5 RESTROOMS Q3

(minimum of 30 stores)

- 1 **Buc-ee's**
- 2 **Kwik Trip**
- 3 **Kelley's Market**
- 4 **Hy-Vee Gas**
- 5 **Weigel's**

**Recommendation:** Restrooms are a true litmus test of overall store quality. Rather than considering them an afterthought, today's leading brands understand that clean restrooms are a core value proposition.

With 69% of GasBuddy users saying that they wouldn't visit a store with less than 3 out of 5 stars on the app, it's important to take a proactive approach in maintaining restrooms. Low ratings and negative reviews at a single store can impact the reputation of an entire brand while positive online feedback can enhance it.



In Q3, stations near interstates with  
above-average restroom ratings received  
**33% MORE VISITS**  
than those with below-average ratings

\*Analysis of nearly 61,000 stations near interstates



# THE HIGHEST VOLUME RETAILERS IN Q3

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## TOP 3

	BRAND	2017 OUTLETS	MARKET SHARE	OUTLET SHARE	EFFICIENCY	OVERALL GASBUDDY RATING
1	Buc-ee's	33	0.26%	0.03%	8.73	1
2	Wawa	538	2.51%	0.48%	5.21	4
3	QuikTrip	764	3.25%	0.68%	4.75	3

## ROUNDING OFF THE TOP 10

- 4 Sheetz
- 5 RaceTrac
- 6 Oncue Express
- 7 QuickChek
- 8 Royal Farms
- 9 Maverik
- 10 Kum & Go

### Efficiency is Market Share/Outlet Share.

Every week OPIS calculates market share from millions of transactions at about 130,000 stations in the United States and compiles the percentage of sales by brand for any geographic area desired. In addition to market share, outlet share and efficiency ratings, OPIS calculates the price differential for each brand in real-time to track how a retailer is priced versus their immediate competition at any given moment. All the data is easily manipulated on the ALL NEW OPIS MarketSharePro web portal. For more information about OPIS MarketSharePro, click here: <https://retail.opisnet.com/about/>

\*Based on third Quarter sales

\*\*Only stores with 30 or more sites included in rankings.

\*\*\*OPIS Efficiency Ratings based on fleet card transactions. Nearly every brand is represented except for Costco, Sam's Club and BJ's and a handful of local super market chains.

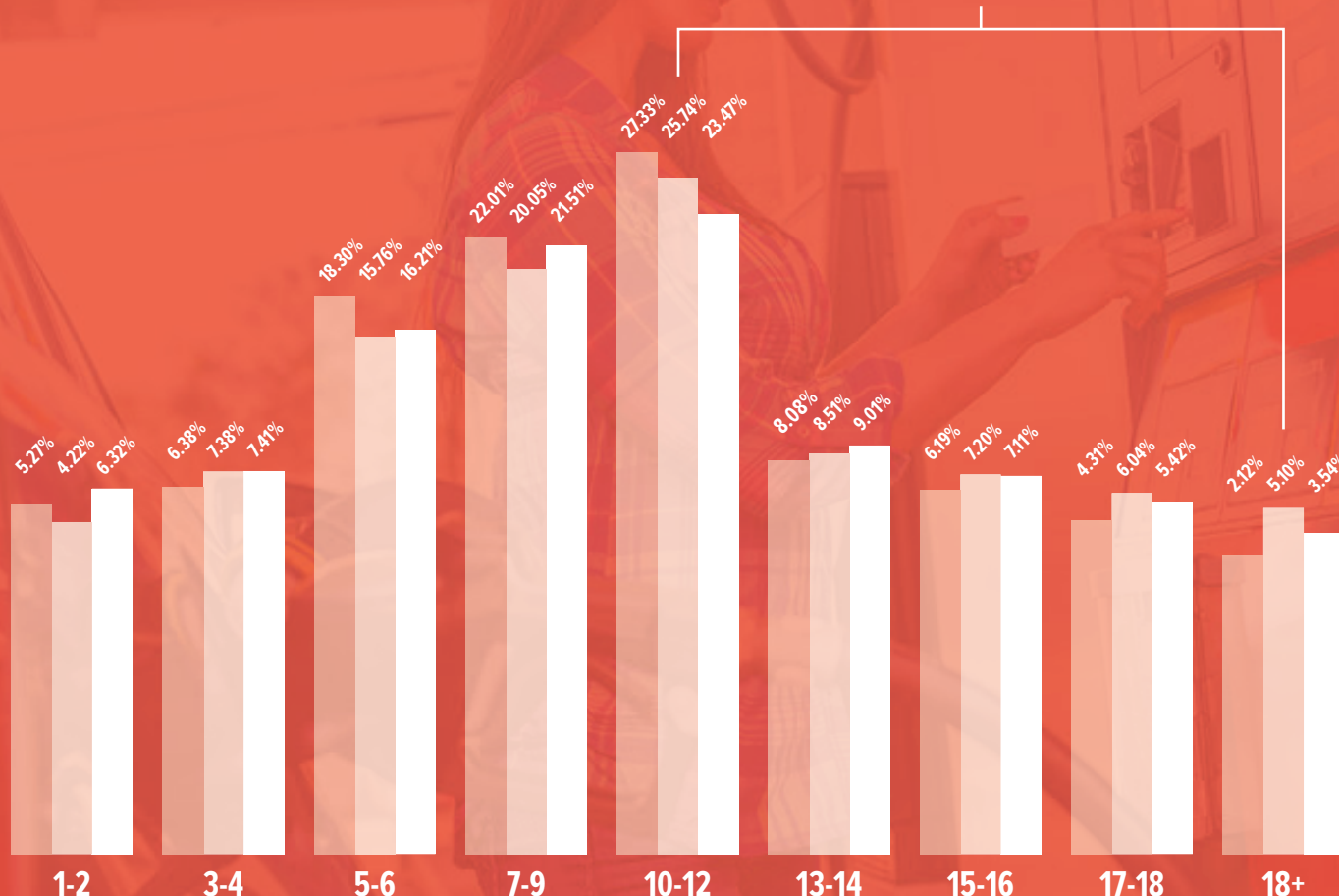
OPIS MarketSharePro is part of the new OPIS Retail Suite of products that track station prices, margins, gasoline demand and market share.





# CREATURES OF HABIT

As GasBuddies took to the roads for summer travel, the percentage of app users visiting convenience stores once a week or more decreased slightly from approximately 53% in Q2 to 48.5% in Q3.



GasBuddy Station Store Visit Frequency in Q1, Q2 and Q3

## CATCH THEM WHILE YOU CAN

While visit frequency was slightly down in Q3, dwell time increased, with

**70% of GasBuddy users spending more than 5 minutes at any location, compared to 68% in Q2.**



**Recommendation:** Today's leading convenience stores are in a position to compete with coffee shops, QSRs, liquor stores, and even grocery stores. With the busy Q4 holiday season around the corner, take advantage of well-timed and targeted mobile promotions to reach customers in the "last mile" of their journey. And with customers spending an average of 2-3 minutes to refuel, consider your signage at the pumps. Appeal to a broad audience by highlighting the full range of your in-store offerings.

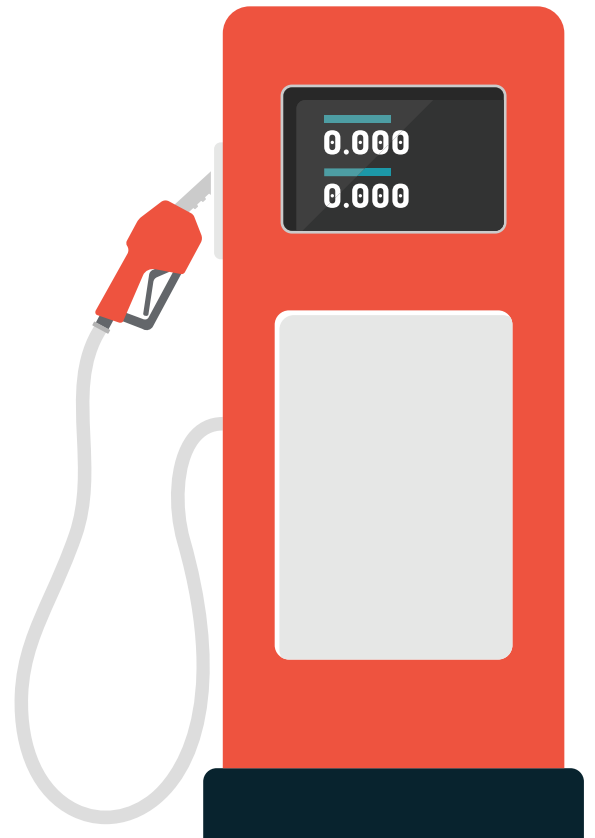
# HOLIDAY ROAD

**Q3 was a busy time for GasBuddy users, with gas stations experiencing an uplift in foot traffic of 56% over Q2.**

The month of July was the most highly-trafficked this quarter. The 4th of July was a busy time for travel, but the following week of July 9-15 saw the largest number of weekly visits to gas stations.

July 30 through August 5 was another busy week, while September 3-9 performed well relative to the rest as GasBuddies traveled for Labor Day.

**Recommendation:** Q4 is expected to be a busy time for travel—especially towards the end of November and December. These holidays often drive consumers to out-of-town locations where they're unfamiliar with regional brands. Catch their attention and drive in-store sales with effective advertisements and promotions at the pump.



  
**MOST VISITS**

**BUSIEST TIMES**  
8AM, 8PM, 9PM

**SLOWEST TIMES**  
2AM, 3AM, 4AM



  
**LEAST VISITS**







GasBuddy

# OUR SUMMER IN REVIEW

GasBuddy users took to the road during Q3 2017 for a summer of shopping, vacations, road trips, and holiday travel. Let's take a closer look at our habits and preferences.



## Summer Travel Season

GasBuddy users took to the roads and traveled this summer. These categories saw the largest uplift in foot traffic.

(shows % uplift from Q2 to Q3)

Leisure

**58.81%**

Gas Stations

**55.76%**

Economy Hotels

**51.34%**



## Other Top Performers

(shows % uplift from Q2 to Q3)

Malls/Shopping Centers

**48.46%**

Midscale Hotels

**46.08%**

Auto Parts

**41.25%**

QSRs

**36.35%**

Insurance

**35.99%**

Coffee

**32.11%**

Auto Dealers

**29.77%**

Movie Theaters

**26.31%**



## Most-Visited Big Box Stores

Walmart

Costco

Big Lots



## Most-Visited QSRs

McDonald's

Subway

Taco Bell



## Most-Visited Coffee Shops

Starbucks

Dunkin' Donuts

Tim Horton's



## Most-Visited Auto Repair Retailers

Autozone

Advance Auto Parts

Jiffy Lube



### Most-Visited Auto Rental Brands

Enterprise

Hertz

Avis



### Most-Visited Hotels

Days Inn

Quality Inn

Super 8



### Most-Visited Pharmacies

CVS

Walgreens

Rite Aid



### Most-Visited Grocery Stores

WalMart

Metro

Kroger



### GasBuddies who Visited QSRs also Visited These Big Box Retailers

Walmart

JcPenney

Costco



### GasBuddies who Visited QSRs also Visited These Footwear Retailers

Payless

Journey's

Foot Locker



### Auto Buyers Visited These Health Stores

GNC

The Vitamin Shoppe

Trader Joe's



### Auto Buyers Visited These Banks

Chase

Bank of America

Wells Fargo



### GasBuddies who Traveled Visited These Casual Dining Restaurants

Olive Garden

Chili's

Denny's



### GasBuddies who Traveled Visited These Types of Asian Restaurants

Thai

Chinese

Indian



### GasBuddies who Traveled Visited These Sporting Goods Retailers

Bike shops (various)

Lids

Champs Sports



## Trading Places

Compared to previous weekends, some categories received large uplifts in foot traffic during the 4th of July weekend but experienced decreases during the Labor Day weekend.

(shows % change during holiday weekend compared to prior weekend)

### 4th of July Weekend

Financial Services

**42.52%**



Insurance

**38.02%**



Auto Dealers

**27.14%**

### Labor Day Weekend

Financial Services

**-41%**



Insurance

**-42.33%**



Auto Dealers

**-26.17%**



### Quick and Delicious

These QSRs saw the largest increases in foot traffic during the 4th of July weekend.

(shows % uplift during 4th of July Weekend compared to prior weekend)

Krystal | **35.22%**

Bojangles | **33.11%**

Cici's Pizza | **32.71%**



### Looking Good for the 4th

These apparel retailers saw the largest increases in foot traffic during the 4th of July weekend.

(shows % uplift during 4th of July Weekend compared to prior weekend)

Tommy Hilfiger | **44.46%**

BonWorth | **43.87%**

OshKosh B'gosh | **43.59%**



### The Great Outdoors

These outdoor retailers saw the largest increases in foot traffic during the 4th of July weekend.

(shows % uplift during 4th of July Weekend compared to prior weekend)

Columbia | **38.77%**

REI | **34.68%**

Eddie Bauer | **30.44%**



### Visits to Starbucks during Labor Day Weekend

**122,351**



### Visits to McDonald's during Labor Day Weekend

**118,228**



### Visits to WalMart during Labor Day Weekend

**75,022**

## About GasBuddy

GasBuddy is a smartphone app connecting drivers with their Perfect Pit Stop™. With nearly 70 million downloads, 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, Canada and Australia. 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 company, leveraging the largest database 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 and 2 in 5 smartphones globally, 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. Cuebiq is headquartered in New York with offices in San Francisco, Chicago, Italy and China.

## About OPIS

OPIS, an IHS Markit (Nasdaq: INFO) company, is one of the world's most comprehensive sources for petroleum, LPG/NGL, jet fuel and biofuels pricing and news information—with offices in the U.S., Europe and Singapore—and is the most widely accepted U.S. fuel price benchmark for supply contracts and competitive positioning.

## Methodology

From July 1 to September 30, 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 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 15 minutes.