



# Buddy Up: C-Store Shopper Insights

August 2021: The New Pandemic Consumer

The quarterly update powered by  
PDI GasBuddy Survey Data

# 15,000+ Consumers Shared the Impact of COVID-19 on Daily Routines

In January 2020, the U.S. confirmed its first case of COVID-19 in Washington state. Conditions on the ground, from infection rates to consumer purchasing behaviors, were changing daily on a scale never seen before.

In April 2020, shortly after many local authorities issued the first round of lock-downs, PDI GasBuddy published a 16-question survey to gauge the pandemic's influence on consumer shopping behaviors and their comfort level in performing certain actions. We recently followed up with the same consumers in a second round of this "pulse" survey to see what's changed over the past year. Let's take a look...



Food Delivery



Trip and Basket Data



Shopping Destinations



Safety Protocols



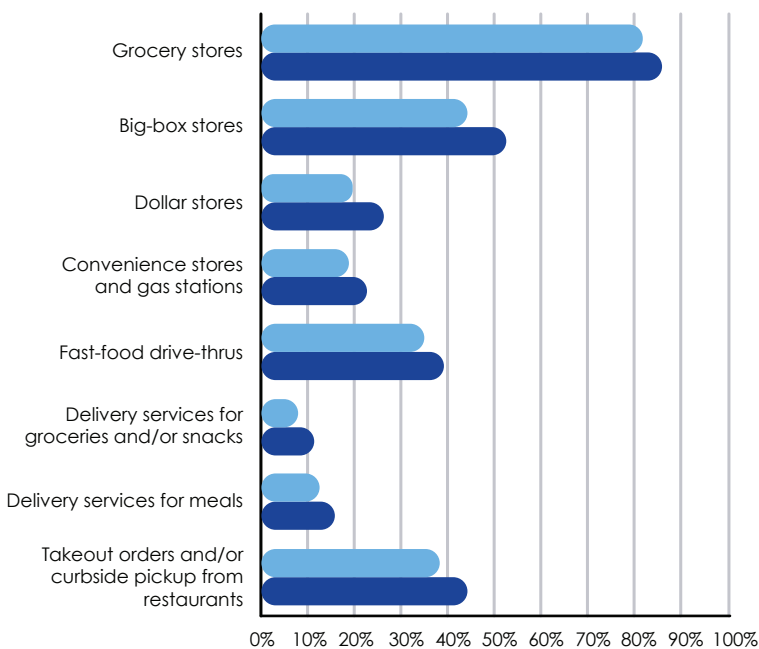
# Why Leave the House if You Can Order Delivery?

**While the number of shoppers has risen, so have food delivery options.**

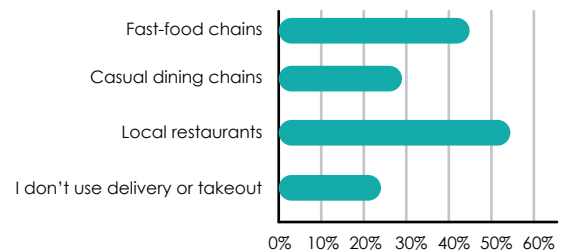
Stores have opened their doors back up to the public, and the competition is fiercer than ever. Retailers now face local competition in addition to previously unseen competitors that have entered the delivery space. The looming last-mile disruption the industry has been tracking year over year gained momentum during the pandemic, leaving retailers in a game of catch-up. Moreover, the average c-store customer is changing. While the number of c-store shoppers has grown over 4% in the past year, younger, female shoppers seem to make up a majority of that customer base.



**During the pandemic, where are you choosing to purchase your food and/or snacks?**  
(Choose all that apply)



**If using delivery and/or takeout, what types of establishments do you purchase from?**  
(Choose all that apply)



● 2020 Responses  
● 2021 Responses

# On the Road Again

Nearly half of Americans are planning on taking a road trip in 2021, and let's face it—normal highway traffic patterns are making a comeback. This comes as no surprise following a year of shelter-in-place mandates have been lifted. That said, how are consumers influenced on the road? How do they select where they will fuel up? Has it changed since the pandemic?

In 2021, when asked to rank the top influencer of their decision to visit a convenience store or fast-food restaurant, respondents ranked “more frequent cleaning and disinfecting” as the most important influencer followed by a tie between “discounts on food or other essential products” and “employees using gloves and masks.”

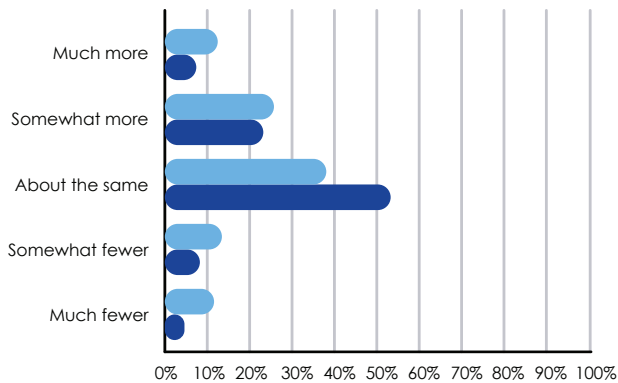


Over 86% of respondents are aware of and paying attention to retailers' commitment to the safety of their employees and customers.

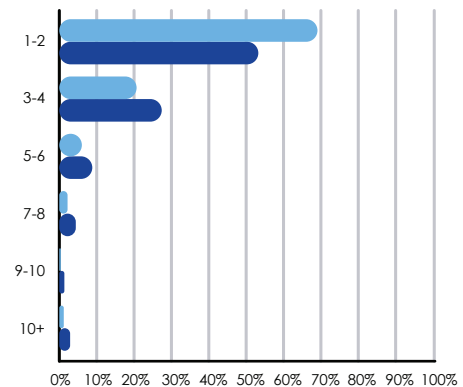


More than 90% of Americans plan on taking a road trip in 2021 regardless of the pandemic.

**When shopping during the pandemic, are you making more or fewer “stops” during each trip?**  
(A “stop” is defined as a visit to a retail location.)



**How many “trips” per week are you making for essentials during the pandemic?**  
(A “trip” is defined as leaving your home or place of employment to make purchases. One trip may include several stores.)



● 2020 Responses — ● 2021 Responses

# Salty, Sweet, Savory, Oh My

With the number of c-store shoppers on the rise, it's more important than ever for retailers to keep a pulse on basket trends and store assortment. Even more, consumer packaged goods (CPG) companies must compete to win over an ever-changing consumer base. These drivers fuel the need for strong retailer-CPG relationships that produce compelling offers and promotions, creating an unforgettable shopping experience while improving revenue for retailers and CPGs alike. With that in mind, when we asked consumers "If you visit convenience stores during the pandemic, what are you purchasing?" the answers trended into three primary categories: fuel, alcohol, and snacks.

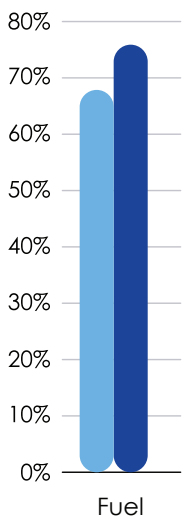
## Aligning Survey Data with Basket Data...

Take this analysis a level deeper to compare what consumers say they're doing versus what their spend is showing us. We report on NACS categories performance month over month so you can stay on top of what's trending.



Dive into the Data... Download Our C-Store Shopper Trends Monthly Report [pdisoftware.com/pdi-insights-cloud/](https://pdisoftware.com/pdi-insights-cloud/)

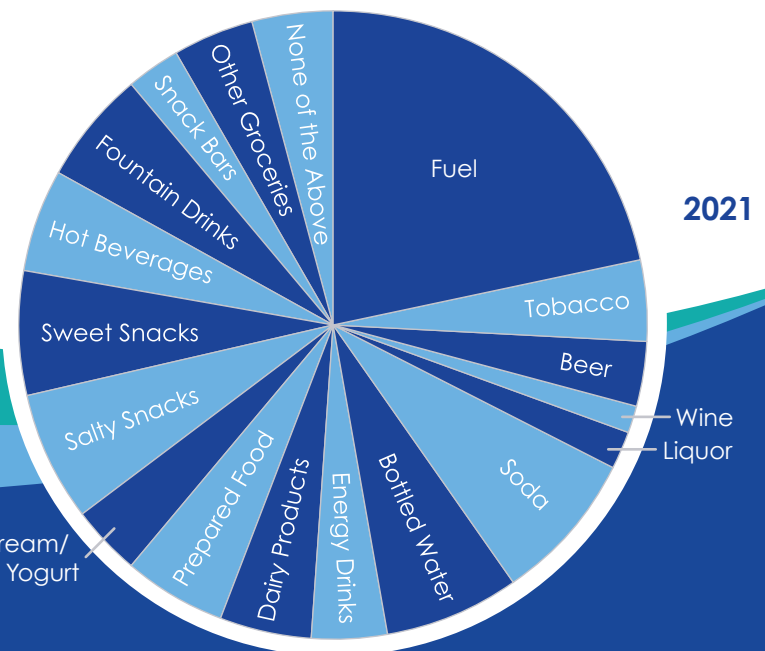
2020 vs. 2021



## Fueling Forward

Trending toward normalizing behaviors, fuel purchases are climbing year over year. With nearly 75% of c-store consumers shopping for fuel, having a strong fuel pricing strategy is crucial to maximize margin revenue.

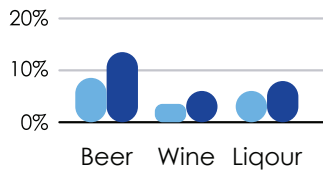
The piece of data that is even more interesting is the 25% of c-store consumers who shop solely for non-fuel inventory. Providing consumers with enticing in-store offers and promotions will be critical in keeping them coming back for more.



Results are shown proportionally (multi-select answer)>>>

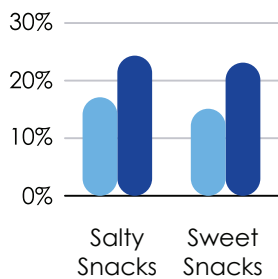
**Fuel purchasing has increased almost 7 percentage points YoY.**

## Tapping into New Revenue Streams



With many consumers sticking to the new trend of staying home, it comes as no surprise that surveyed consumers report a significant increase in their c-store alcohol purchases. However, PDI Insights Cloud shows that beer sales are down more than 5% YoY. Check out the **May C-Store Shopper Trends Report** to learn how to get crafty with beer and alcohol sales.

## Can Salty Snacks Make a Comeback?



As seen in the **April C-Store Shopper Trends Report**, salty snacks sales are down 7% YoY, particularly hitting the categories daypart sweet spot of 3-7pm, where 50% of sales are typically made. Yet, when surveyed in April, consumers reported that more than 20% of their trip drivers are to purchase snacks. Is this category making a sweet comeback?

2020 Responses

2021 Responses

As commutes are on the rise, people are picking up more fountain and energy drinks as a “pick-me-up.”

Hot beverage purchases, like coffee, have increased significantly as fresh options become safer.

## Methodology

This report combines GasBuddy consumer survey data from 15,000+ convenience retail consumers across all key U.S. geographic locations. The survey data in this report is evenly represented across gender, location, age, and household income. Some areas of this report combine consumer buying data from 5,500 mid to large-size convenience retail sites across all key U.S. geographic locations from PDI's Insight Cloud solution.

## About GasBuddy

New to the PDI solution suite, the GasBuddy app features users representing billions of fuel gallons and hundreds of millions of dollars of convenience retail spend. The GasBuddy app currently generates fuel pricing information on 150,000 stations across North America. While most of its peer-to-peer interactions are from users searching and posting local gas prices, the app also enables reviews of facilities and supports wayfinding. All GasBuddy data used in this report is based on consumer data and consumer surveys.

## About Insights Cloud

Using unmatched insight automation and guided analytical applications, PDI Insights Cloud gives retailers and CPGs precise, real-time, actionable insights to drive ROI and refine their merchandising, loyalty, and promotion strategies. Convenience retailers and CPG brands can optimize promotions and store assortment by leveraging rapid business intelligence guidance to measure and refine store-level merchandising and marketing decisions. PDI Insights Cloud provides access to transaction, price book, and shopper data with easy integration and instant results.

## About PDI

Professional Datasolutions, Inc. (PDI) helps convenience retailers and petroleum wholesalers thrive through digital transformation and enterprise software that enables them to grow topline revenue, optimize operations, and unify their business across the entire value chain. Over 1,500 customers in more than 200,000 locations worldwide count on our leading ERP, logistics, fuel pricing, and marketing cloud solutions to provide insights that increase volume, margin, and customer loyalty. PDI owns and operates the Fuel Rewards® loyalty program that is consistently ranked as a top-performing fuel savings program year after year. For more than 35 years, our comprehensive suite of solutions and unmatched expertise have helped customers of any size reimagine their enterprise and deliver exceptional customer experiences.

