



Buddy Up: C-Store Shopper Insights

July 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



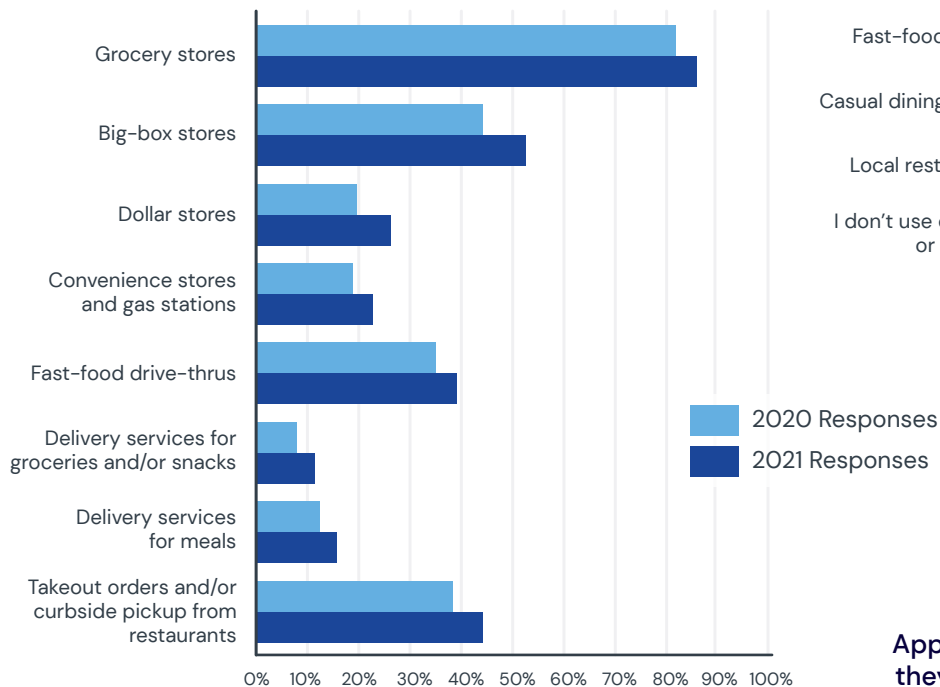
Safety Protocols

Why Leave the House If You Can Order Delivery?

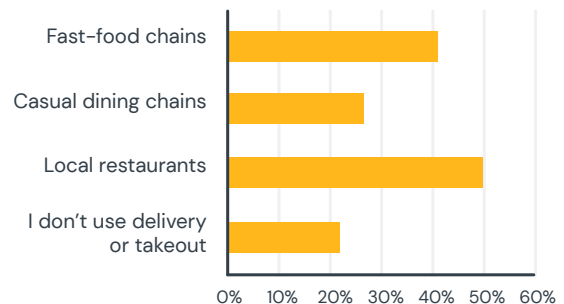
While the number of shoppers has risen, so have food delivery options.

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)



Approximately 2 out of 3 people say they get up to 4 deliveries per week



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 that 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."



86%

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

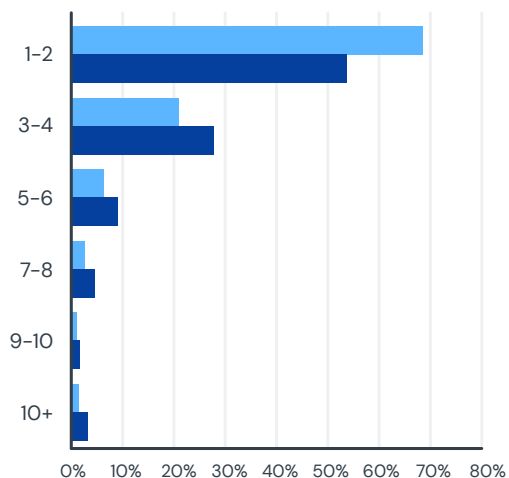


90%

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

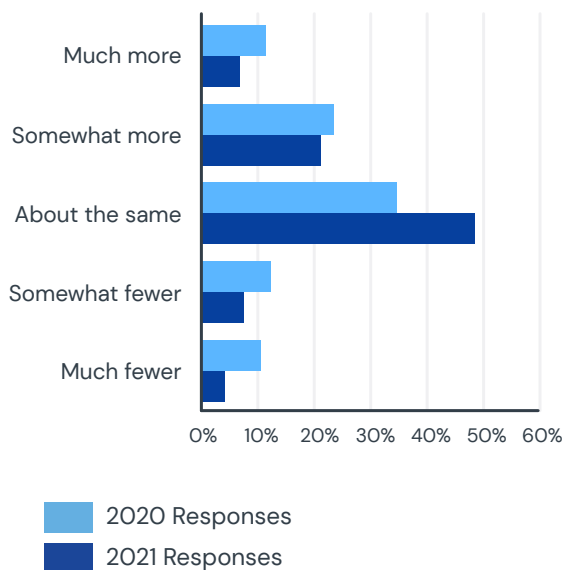
How many "trips" per week are you making for essentials during the pandemic?

(A "trip" is defined as leaving your home or place of employment to make purchases. One trip may include several stores.)



When shopping during the pandemic, are you making more or fewer "stops" during each trip?

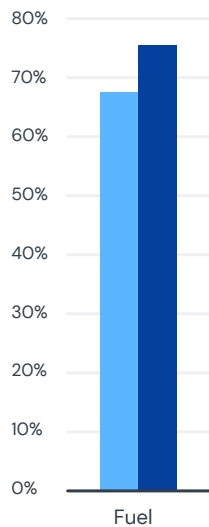
(A "stop" is defined as a visit to a retail location.)



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.


2020 vs. 2021



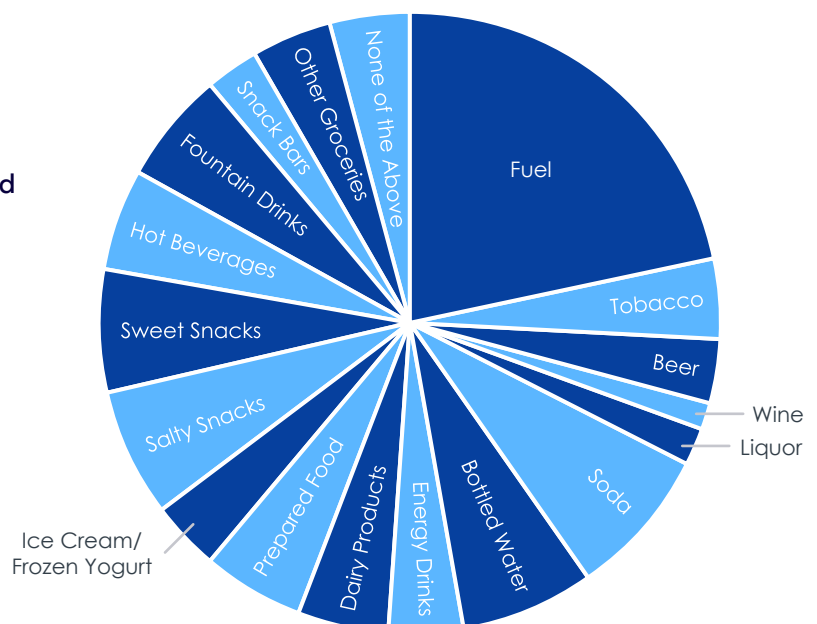
Fueling Forward

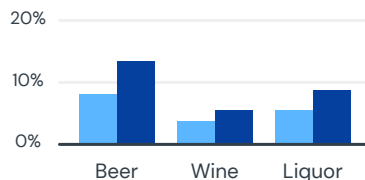
Trending toward normalizing behaviors, fuel purchases are climbing year over year. With nearly 75% of c-store consumers shopping for fuel, having a strong fuel pricing strategy is crucial to maximize margin revenue.

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.

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

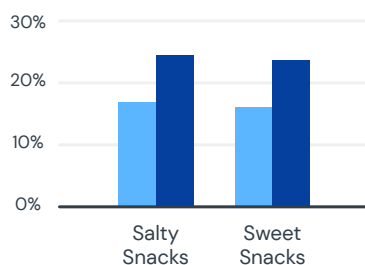
2021 How Results are shown proportionally (multi-select answer)





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. **Can you tap into these beer and alcohol sales?**



Can Salty Snacks Make a Comeback?

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 consumers recently reported that more than 20% of their trip drivers are to purchase snacks. **Is this category making a sweet comeback?**

2020 Responses 2021 Responses



Something to pour over



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. 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.

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

About PDI

PDI Technologies resides at the intersection of productivity and sales growth, delivering powerful solutions that serve as the backbone of the convenience retail and petroleum wholesale ecosystem. By “Connecting Convenience” across the globe, we empower businesses to increase productivity, make more informed decisions, and engage faster with their customers.

For more information about PDI, visit us at www.pditechnologies.com.

