

Tracking Convenience Report: From the Pump to the C-Store

Analyzing the latest fuel and convenience retail trends with data from PDI and GasBuddy



Overview

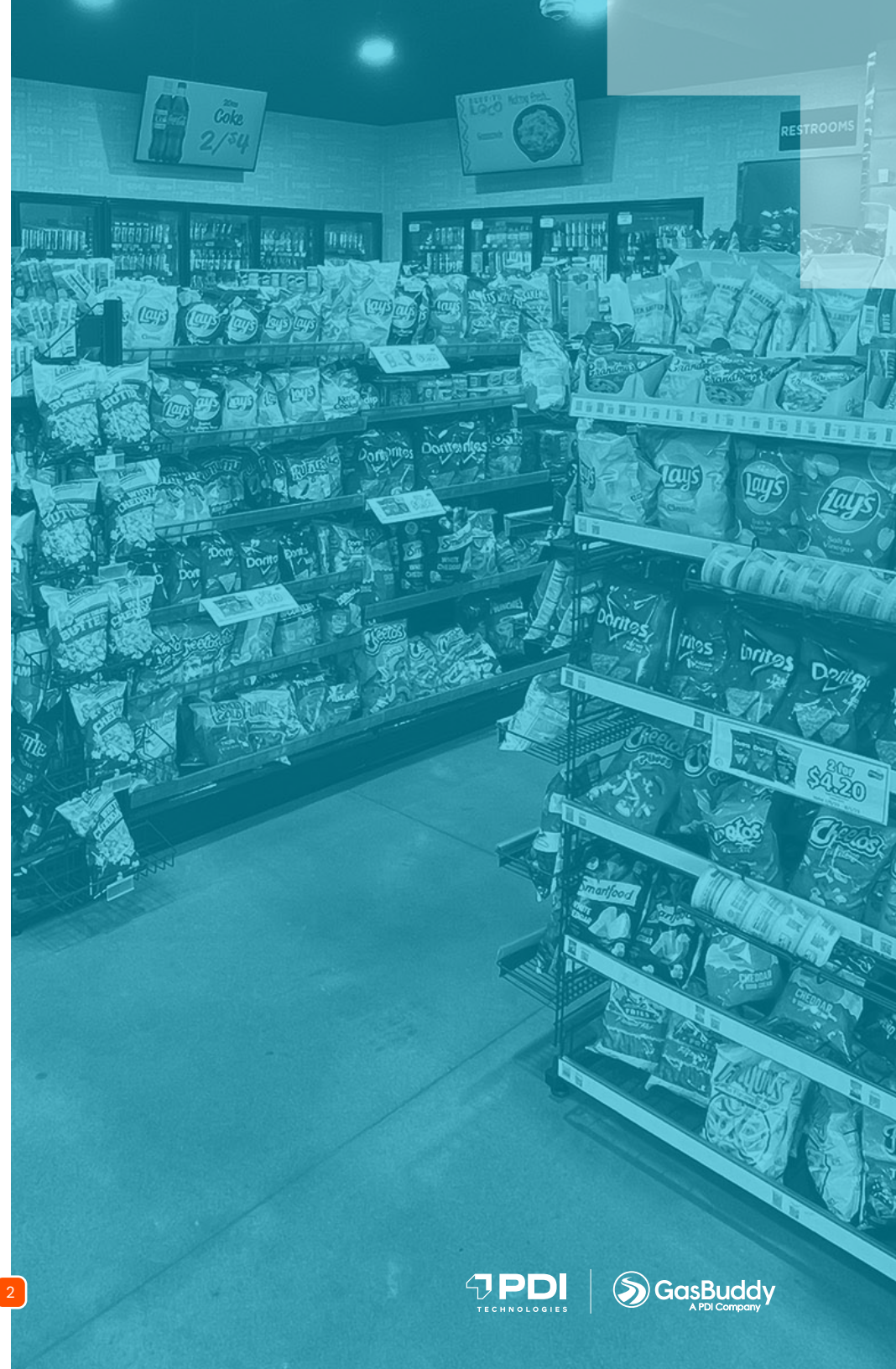
This report highlights key findings in the fuel and convenience retail market based on data and analysis from PDI and GasBuddy. Unless noted, the referenced data is from 2023. All the data reflects evolving consumer behaviors at the pump and in the c-store—including how each element impacts other parts of the convenience ecosystem.

Whether you're part of a convenience retailer, fuel wholesaler, or CPG brand, you'll discover the latest trends, deep data analysis, and actionable insights that can help improve your own business results.

The report provides tips on how to:

- › Increase units per basket for foundational growth
- › Get to know “mission mindsets” across dayparts
- › Build baskets in the morning and create trips in the afternoon
- › Convert visitors from pump to store
- › Tap into CPG-funded promotions
- › Grow sales with curated assortments
- › Make a case for beer

If you would like PDI to help you with a detailed data and analysis of your own customer trends and growth opportunities, [contact us](#) today.

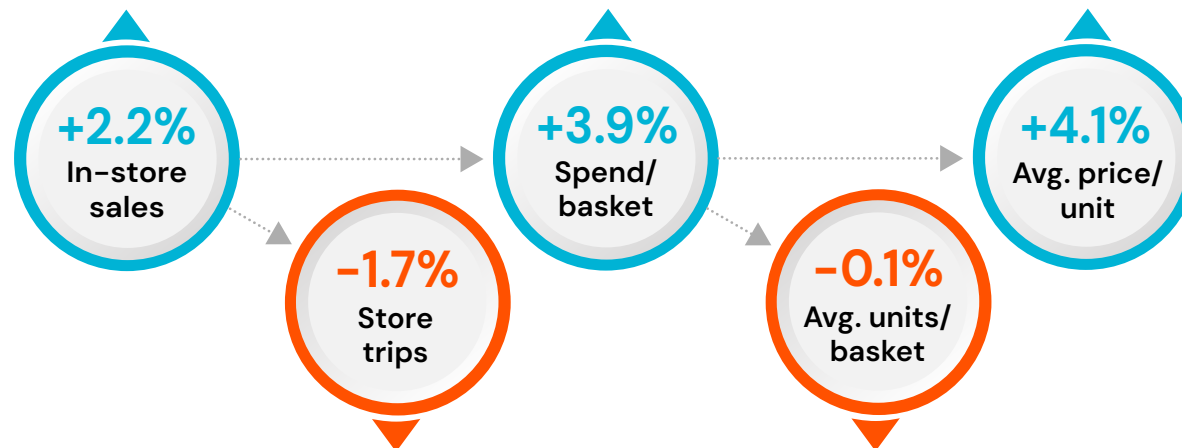


Increase Units per Basket for Foundational Growth

During 2023, convenience retailers have experienced significant tailwinds behind the rise of in-store sales (up 2.2%), spend per basket (up 3.9%), and average price per unit (up 4.1%). In fact, most of this growth has been driven by inflation.

Unfortunately, store trips (down 1.7%) and units per basket (down 0.1%) haven't been growing, creating concerns about foundational long-term growth. That's because some consumers are responding to higher prices by making fewer trips or purchasing fewer items. To create more sustainable growth, retailers need to strengthen their business fundamentals, such as increasing average basket size or creating more trips.

Key C-Store Growth Metrics in 2023



Insight

Growing trips requires retailers to deliver both convenience and value for consumers who are feeling stretched by inflation. If c-stores can't deliver better value, consumers might turn to other retail channels, such as discount stores.



Opportunity

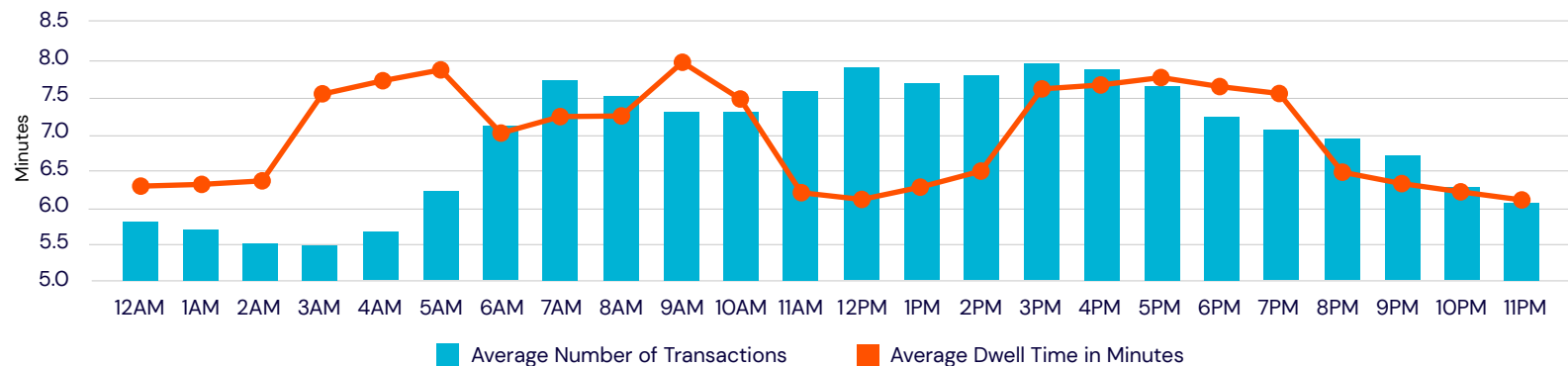
C-stores must pivot to growing units per basket and increasing the overall number of trips. Consider offering value-based "always-on" loyalty discounts or promotions such as those available through [PDI Offer Network](#).

Get to Know “Mission Mindsets” across Dayparts

Average dwell times fluctuate throughout the day, but the overall percentage of shoppers spending 5 to 10 minutes per trip has grown in 2023. These longer dwell times can be positive (reflecting a shopper willing to linger and browse) or negative (a frustrated shopper who feels like they’re wasting time waiting in a checkout line).

Positive dwell time typically involves inspirational shoppers who are open-minded, while negative dwell time typically involves shoppers focused on efficiency or highly targeted “mission mindsets.” Retailers must have a plan to reach both types of shoppers.

Average Dwell Times and Transactions 1H 2023



Insight

Morning rush and lunch trips tend to skew toward efficiency (getting in and out as quickly as possible). Afternoon trips often involve inspirational shoppers who are more willing to linger and might be open to new products or offers.



Opportunity

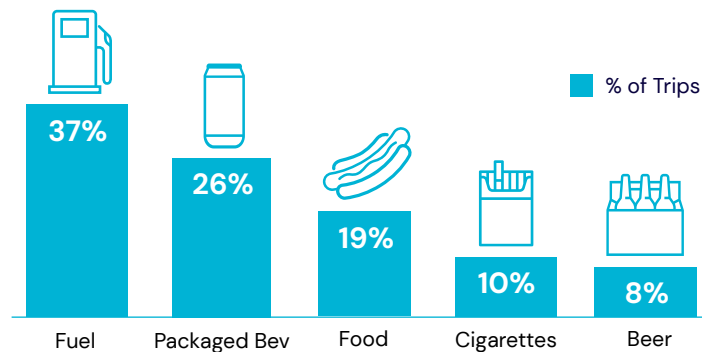
Understanding peak visit times helps you align [staff schedules](#) with the busiest dayparts to keep shoppers happy. Turning your data into [insights](#) helps you know when to schedule promotions for certain products or customer mindsets.

Build Baskets in the Morning and Create Trips in the Afternoon

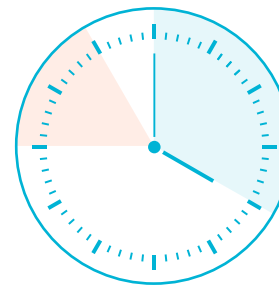
It's critical to adapt to different consumer missions and mindsets throughout the day. For example, packaged beverages and foodservice tend to drive morning trips, while cigarettes and beer purchases often drive afternoon trips. However, fuel remains the biggest overall trip driver throughout the day.

Retailers must have a plan for all types of shoppers, including those who just want to complete their original mission and are difficult to influence in the moment, as well as shoppers who might be open to influence or willing to make an impulse purchase.

Top Trip Drivers



Affinity Pairing



9 to 11 am

Focus on efficiency shoppers
Combine packaged beverages and foodservice offers

12 to 4 pm

Focus on inspirational shoppers
Combine beer and foodservice offers



Insight

When people are in a rush (efficiency shoppers), try to get them to add just one more item to their basket. When people are willing to linger (inspirational shoppers), entice them with a new product category or promotion.



Opportunity

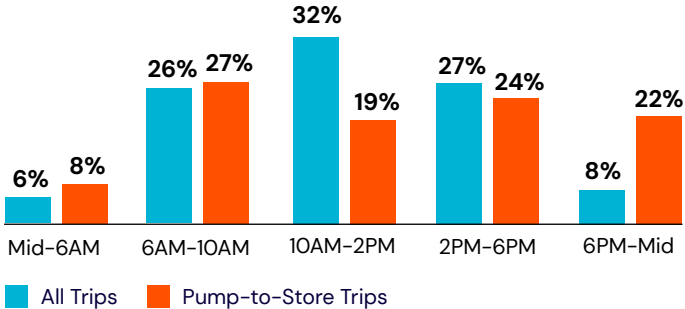
Encourage shoppers to add to their baskets by offering packaged beverage and [foodservice](#) affinities from 9 to 11 am. Focus on expanding pump-to-store conversion from 12 to 4 pm using [loyalty and rewards](#) offers.

Convert Visitors from Pump to Store

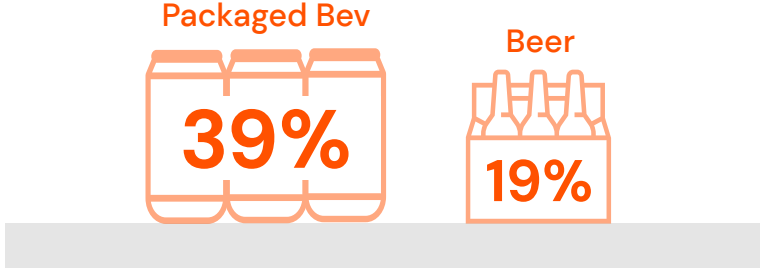
Because fuel stops are the top drivers for c-store trips, it's important to entice fuel shoppers into the store to continue growing sales through larger baskets. It helps to understand which fuel buyers are most likely to convert into in-store shoppers—and what times they're most likely to convert.

Most pump-to-store conversions occur during the morning and afternoon rush hours. The top categories in pump-to-store "converted" baskets are packaged beverages (in 39% of baskets) followed by beer (in 19% of baskets). Promoting these items to fuel buyers can significantly increase in-store traffic and purchases.

Pump-to-Store Conversions by Daypart



Top Categories for Pump-to-Store Consumers



Insight

Promotions for certain product categories align well with specific dayparts. For example, food is a common purchase during the morning, while candy and alcohol shoppers tend to show up later in the day.



Opportunity

You can use [GasBuddy Listings](#) to attract digital-savvy shoppers to your pump with selective advertising. Once they're onsite, you can catch their eye with targeted [offers](#) and [promotions](#) right at the pump.

Tap into CPG-Funded Promotions

With inflation remaining relatively high, more consumers are searching for greater value—even with discretionary purchases. As product prices remain high, smart convenience retailers are leveraging CPG-funded promotions as a cost-effective way to attract new customers.

To leverage this type of spending, retailers must understand their customers better and provide the data that shows why CPGs will be making a wise investment with their promotions. The example below of an actual in-store promotion highlights the positive long-term results of a product trial promotion for existing buyers as well as new buyers initially attracted by the trial offer.



Insight

Inflationary prices are driving more consumers to look for value-oriented offers—similar to what they find at discount retailers and grocery stores. These offers are a popular way to attract new customers and grow basket size.



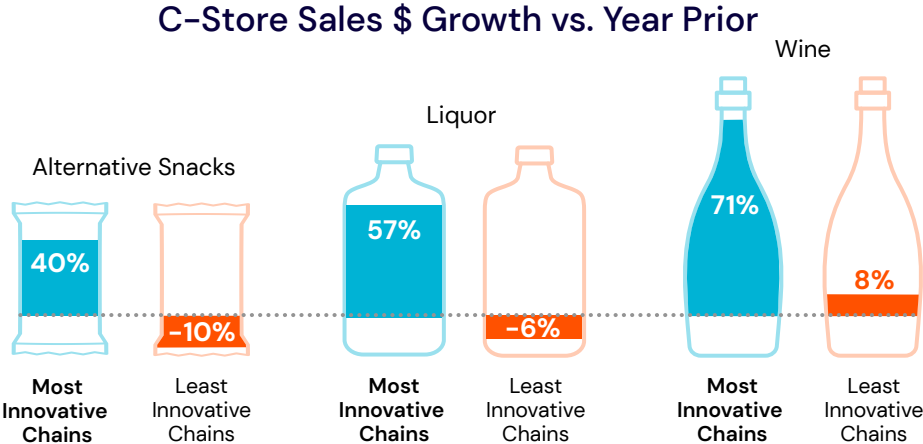
Opportunity

When efficiency-focused shoppers are in a rush, incentivize them to add at least one more item to their basket. Dive deeper into analyzing their behaviors and offer them a simplified, value-oriented promotion.

Grow Sales with Curated Assortments

One way to drive sales growth is to analyze the latest consumer purchasing trends and product innovations to make sure you have the right product mix. For inspirational shoppers, there's growing evidence that offering a broader assortment of new products can increase sales.

In 2023, three key categories have experienced especially high growth in c-stores: alternative snacks (such as jerky and protein bars), liquor, and wine. You might be able to catch the attention of shoppers who are more open to new choices by focusing on these high-growth categories. The most innovative c-store chains are the ones that continually test new products and adjust their product mix to keep things fresh.



Insight

Take a more strategic approach to your product assortment by staying ahead of industry trends, keeping your inventory fresh, and showcasing key products through CPG brand-funded offers.



Opportunity

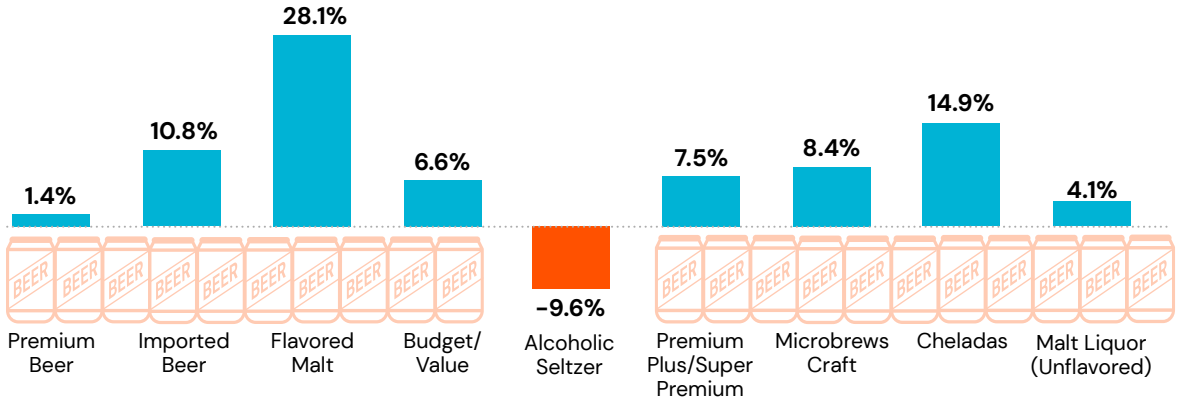
Be more data-driven in understanding consumer mindsets and behaviors with PDI [Insights and Analytics](#), then partner with [CPGs and manufacturers](#) that are spending aggressively on offers and promotions (especially for inspirational shoppers).

Make a Case for Beer

A deeper dive into beer subcategories highlights some interesting changes from 2022 to 2023. Premium and imported beer collectively make up half of beer category sales. However, imported beer is experiencing much higher year-over-year (YOY) growth (10.8% compared to 1.4%).

While still lower in market share, cheladas (beer cocktails) at 14.9% and flavored malt beverages at 28.1% represent two up-and-coming subcategories that are clamoring for more shelf space. When it comes to pack size, single-count UPC volume grew 34% YOY, while 6-packs experienced a decline of 2%.

Beer Subcategory Growth 2022 vs. 2023



Insight

The flavored malt beverage category continues its rapid ascent with hard lemonades, spiked teas, and, more recently, “clubtails” serving as some of the most popular choices leading the way.



Opportunity

If you don’t already use them, try exploring the value of [age-restricted offers](#) for beer, liquor, and wine. Consider partnering with alcohol suppliers to provide digital rebates that help increase your shoppers’ basket size.

Discover Your Own Opportunities

We hope you find this data and analysis valuable in understanding changing consumer behaviors and how the latest trends can impact your business.

If you would like more access to this type of data and how you can leverage it, PDI can help. Whether you're a retailer or a CPG brand, our data experts can work with you to define your goals and achieve them faster than you ever thought possible.

Solutions such as [GasBuddy Business Pages](#) can help you connect with millions of consumers, monitor foot traffic, promote your store amenities, and stay competitive—all from one easy-to-use dashboard.

Let's Talk

Learn more at pditechnologies.com.

Or [contact us](#) today.

For media inquiries or to discuss fuel and convenience industry trends, contact pr@pditechnologies.com.



Report Methodology

This report combines GasBuddy® consumer survey data from 15,000+ convenience retail consumers across all key U.S. geographic locations. The survey data is evenly represented across gender, location, age, and household income. Some areas of this report combine consumer buying data from PDI for 20,000 convenience retail sites across all key U.S. geographic locations.

About GasBuddy

GasBuddy is the leading fuel savings platform providing North American drivers with the most ways to save money on gas. GasBuddy has delivered more than \$3.5 billion in cumulative savings to its users through providing real-time gas price information at 150,000+ stations, offering cash-back rewards on purchases with brand partners, and through the Pay with GasBuddy™ payments card that offers cents-off per gallon at virtually all gas stations across the U.S. As one of the most highly rated apps in the history of the App Store, GasBuddy has been downloaded over 100 million times. Acquired by PDI Technologies in 2021, GasBuddy's publishing and software businesses enable the world's leading fuel, convenience, QSR, and CPG companies to shorten the distance between the fueling public and their brands.

gasbuddy.com

About PDI Technologies

With 40 years of industry leadership, PDI Technologies, Inc. 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 informed decisions, and engage faster with their customers. From large-scale ERP and logistics operations to loyalty programs and cybersecurity, we're simplifying the industry supply chain for whatever comes next. Today, we serve over 200,000 locations worldwide with solutions like the Fuel Rewards® program and GasBuddy, two popular brands representing more than 30 million active users.

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