



Convenience Store Shopper Insights, Part 2 Non-Chain C-store Trips

November 2013



ABOUT CCIPANEL

The Convenience Consumer Insights Panel (cciPanel), a first-of-its-kind mobile research panel from Management Science Associates and Paradigm Sample, was designed to capture purchase-decision and attitudinal information among convenience store shoppers, including the millennial segment most likely to shop the channel.



cciPanel examined the recent market baskets among 18+ year old shoppers between April and September, 2012. Data represents 840 visits to non-chain convenience stores.



DEFINITIONS:

Non-Chain C-Store: Is not part of a chain. Is a neighborhood/community C-Store.

Planned Trip inside C-store: Planned decision - routinely visit or making special trip.

Unplanned Trip inside C-store: On-the-spot decision – was en route to/from another location or outside getting gas.

INSIGHTS

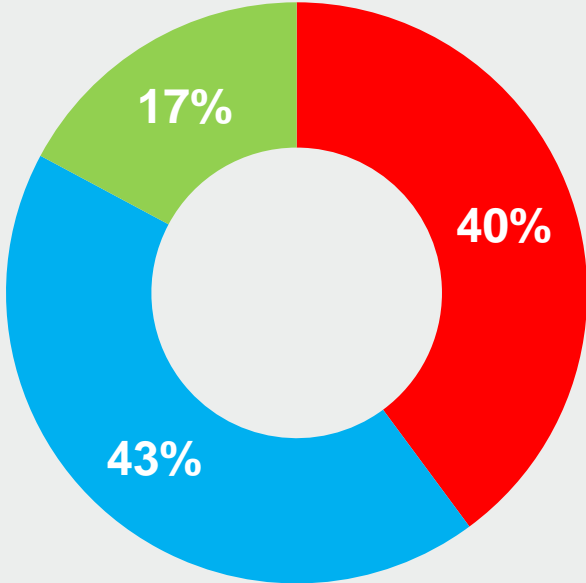
- Visitors to convenience stores have varied missions; some routinely visit to buy tobacco and lottery tickets, while others make last-minute stops for beverages, gas and on-the-go immediate consumption snacks.
- Retailers should employ tactics, such as using social media and prominently displaying signage at the gas pumps, to drive traffic into their stores to build a loyal customer base and attract new customers
 - Differentiate your store and product assortment and provide superior customer service so that you become their preferred C-store.
 - Reward your regular customers with promotional offers to increase their trips to your store and dollars per trip
- Retailers should make sure to:
 - adequately stock the best sellers
 - merchandise frequently purchased products, such as confections and salty snacks, in locations near the cold vault and at the register to drive impulse purchases of these items.

NON-CHAIN C-STORE TRIPS

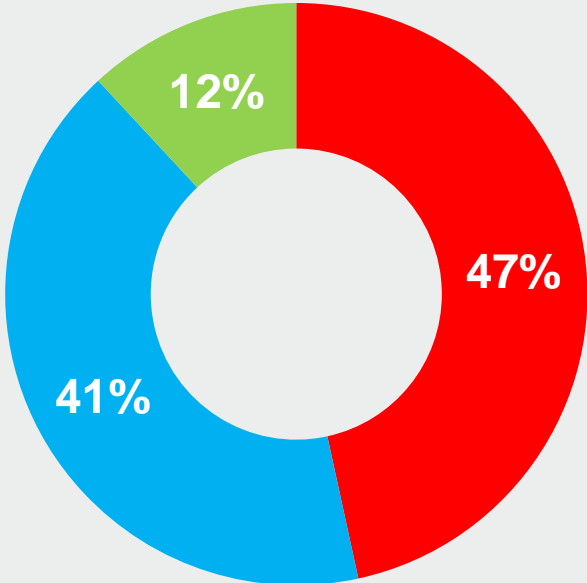
DEMOS - AGE

Stock products that cater to your key shopper segments and their on-the-go lifestyles. Connect and build relationships with social media, particularly to the always-connected millennials, who accounted for 40% and 47% of planned and unplanned trips, respectively.

Planned Trips



Unplanned Trips



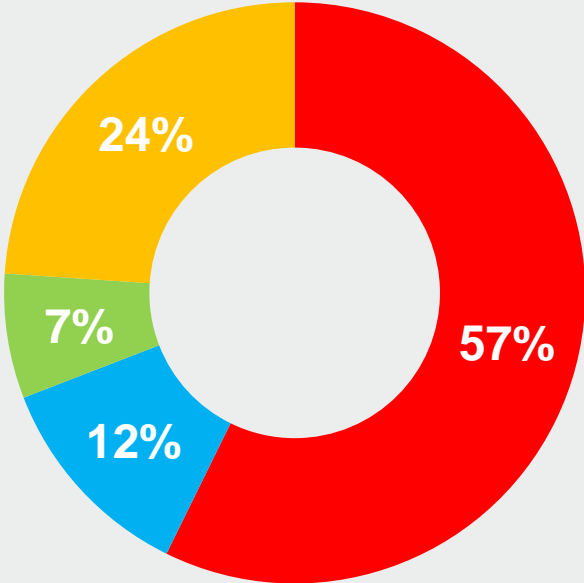
- 18-34 years
- 35-54 years
- 55+ years

Source: cciPanel, 18+ year respondents

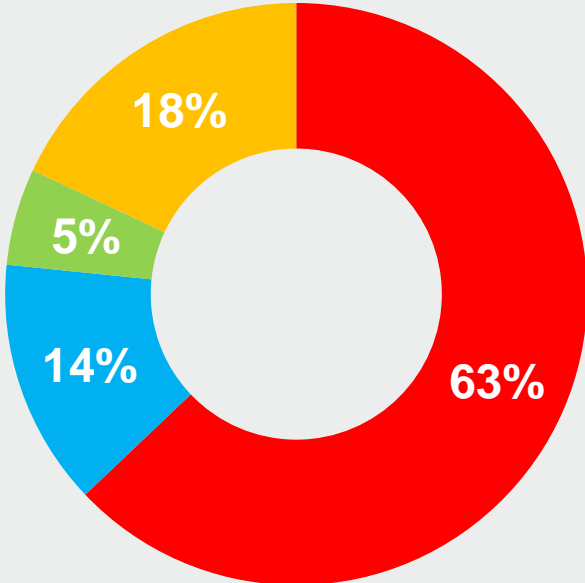
NON-CHAIN C-STORE TRIPS DEMOS - EMPLOYMENT

Approximately 6 in 10 trips were made by shoppers employed outside the home. Differentiate your store so that it becomes their destination for these in-transit visits to fulfill their convenience needs.

Planned Trips



Unplanned Trips



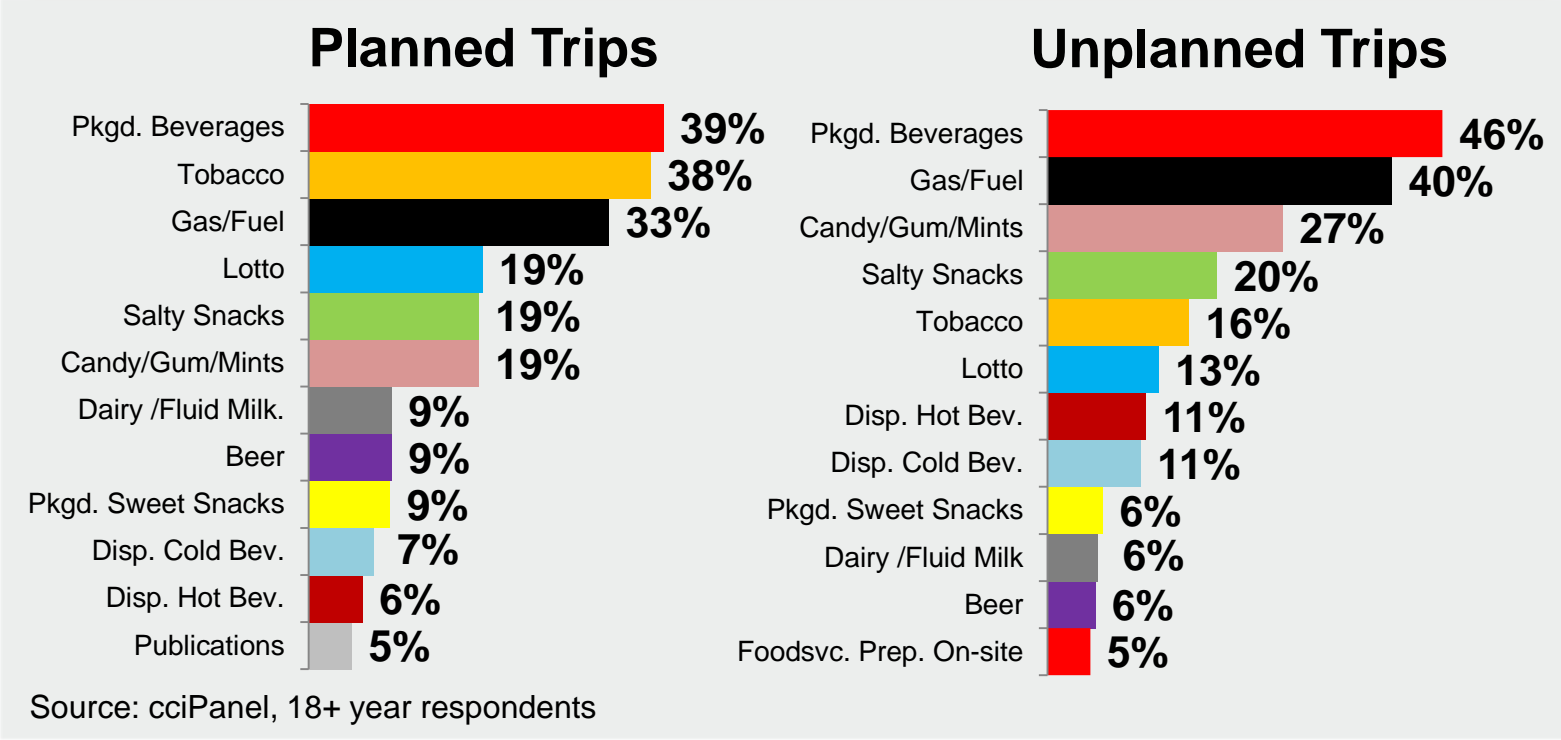
- Employed outside home
- Employed work from home
- Student
- Not employed

Source: cciPanel, 18+ year respondents

NON-CHAIN C-STORE TRIPS

TOP CATEGORIES BOUGHT

Packaged beverages was the leading category purchased. Among planned trips, tobacco followed by gas were the next most frequently purchased categories; among unplanned trips, gas followed by confections were the top categories purchased. Retailers should make sure that the top sellers are always in stock.

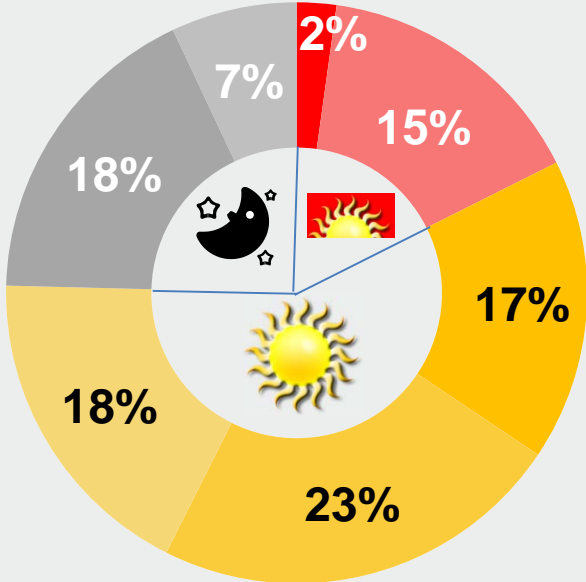


NON-CHAIN C-STORE TRIPS

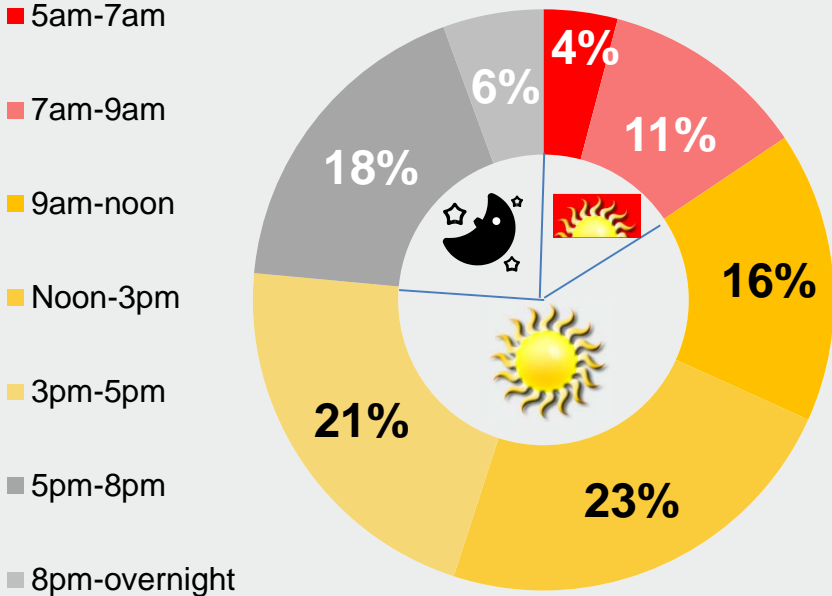
DAYPART SHOPPED

While the majority of visits to C-stores occurred between the typical working hours of 9am and 5pm, retailers should offer special promotions to increase foot traffic and buyers during slower day parts, such as reduced price or combination deals on packaged beverages, salty snacks and confections.

Planned Trips



Unplanned Trips

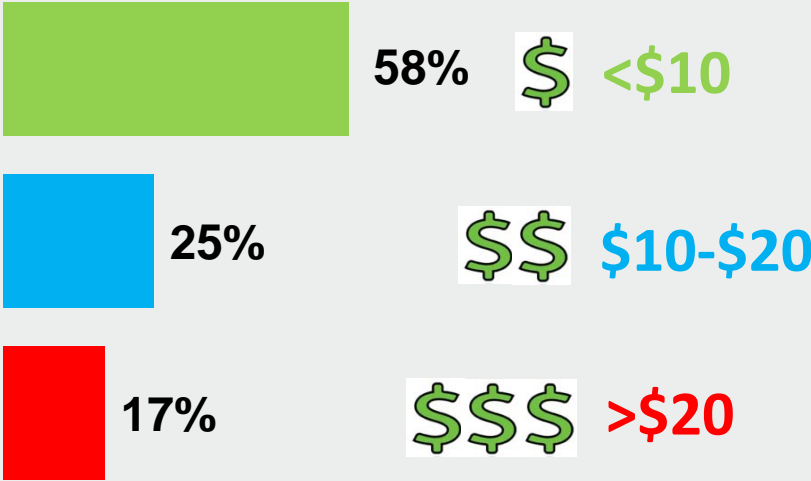


Source: cciPanel, 18+ year respondents

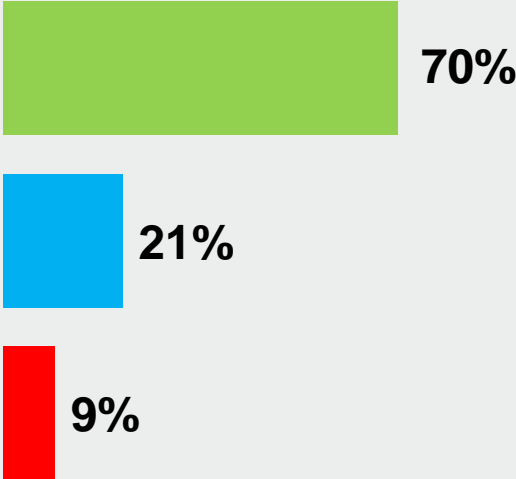
NON-CHAIN C-STORE TRIPS INSIDE STORE SALES

Buyers who made last-minute stops spent less than buyers who planned their trips. For 70% of these trips, buyers spent less than \$10. On planned trips, tobacco was more frequently in the basket which would result in higher rings at the register. Utilize outdoor signage and social media to drive more traffic inside the store and place impulse items in high traffic areas to increase dollars per trip.

Planned Trips



Unplanned Trips

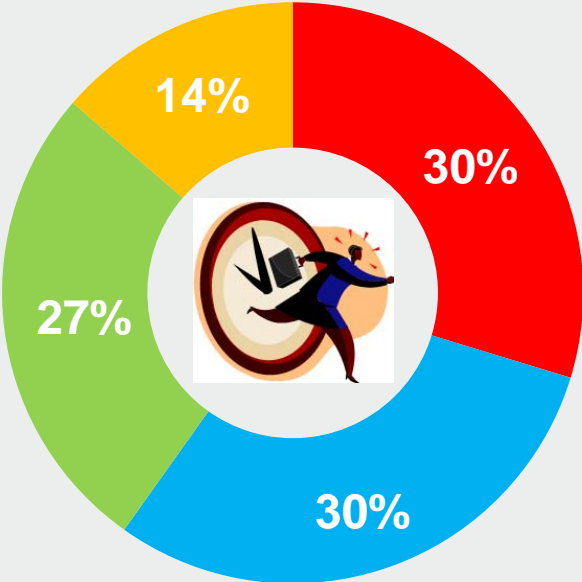


Source: cciPanel, 18+ year respondents

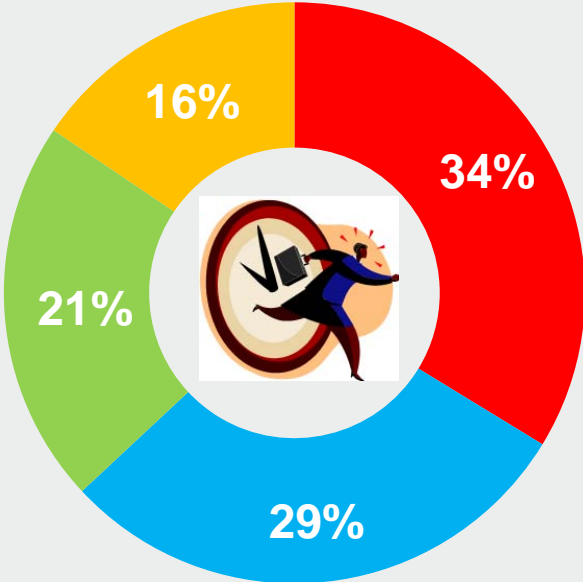
NON-CHAIN C-STORE TRIPS MINUTES INSIDE STORE

Since buyers spent five minutes or less inside the C-store on at least 60% of visits, retailers need to grab shoppers' attention with strategically placed products to increase rings at the register.

Planned Trips



Unplanned Trips



- < 5 minutes
- 5 minutes
- 6-10 minutes
- > 10 minutes

Source: cciPanel, 18+ year respondents