

CHOOSING THE PERFECT PIT STOP

Insights into the Consumer Path to Purchase

Understanding the consumer path to purchase is essential for today's fuel and convenience retailers. Although fuel prices and station locations remain important motivators, the changing retail landscape is increasingly supportive of brands who differentiate themselves with the right product selection and customer experience.

That's why we decided to dive deep into this issue and learn more. As part of CSP's 2018 Fuels 50 coverage¹, we surveyed more than 2,200 highly-engaged GasBuddy users to better-understand their path to purchase.²

Additional insights are included in this report.

IMPULSE TAKES PRIORITY OVER PLANNING

Q: When do you decide that it's time to refuel your vehicle?

	ALL	Male	Female	18-34	35-44	45-54	55-64	65+
I refuel when it is necessary	49%	47%	52%	65%	60%	51%	45%	40%
I refuel when I'm out driving, but I do so before I'm running low	33%	32%	35%	27%	25%	33%	38%	37%
I plan ahead of time to go out and purchase fuel	17%	20%	13%	8%	15%	16%	18%	23%

Note: Due to rounding, results may not add up to 100%

ANALYSIS: Almost half of consumers are fueling up when their tanks are running low as opposed to planning ahead—this behavior is especially apparent for members of younger generations. It's essential for today's retailers to ensure that their stations are visible at the exact time consumers need to refuel.

A digital listings management strategy has become a "must have" in today's marketplace. Even when consumers are familiar with the local gas stations, they may rely on smartphone apps to determine which option saves the most time and avoids poor traffic. Others may use apps to check the hours of operation or see if a station has amenities such as free air. That's why it's essential for your brand to be visible—and have updated information—whenever someone uses Google Maps, GasBuddy, in-dash navigation systems, or asks Alexa to find the nearest station.

90% REFUEL WHILE RUNNING ERRANDS OR DURING THE WORK COMMUTE

Q: I tend to refuel...

	ALL	Male	Female	18-34	35-44	45-54	55-64	65+
On my way to or from work	31%	31%	31%	48%	54%	44%	31%	7%
When I'm out running errands	59%	58%	61%	45%	37%	46%	59%	81%
On a specific trip to the gas station	10%	11%	8%	7%	9%	10%	10%	12%

43% CHOOSE THEIR FUELING DESTINATION IN THE PRE-DRIVE SEGMENT

Q: How do you choose a gas station to refuel your vehicle?

	ALL	Male	Female	18-34	35-44	45-54	55-64	65+
Before driving, I plan to visit specific stations and/or brands	43%	46%	39%	41%	39%	41%	42%	47%
I choose while driving, and I prefer specific stations and/or brands	18%	16%	20%	22%	20%	18%	18%	13%
I choose while driving, I pick the best offer based upon my options	39%	39%	41%	36%	41%	41%	39%	39%

ANALYSIS: More than 2-in-5 respondents say that they have already made their decision about the brand or station they plan to visit before getting into the vehicle. With a large audience of drivers planning their stop before they hit the road, brands and retailers must utilize a multi-channel strategy that allows them to engage with consumers in a pre-drive environment to influence where they plan to stop.

Another large portion of respondents pick the best option while driving, so creating an inviting environment at your stations can help win those impulse decisions. As a result, it's essential for retailers to know if, and when, any of their locations fall below company standards. One of the most effective ways to do this is by monitoring online ratings and reviews. The real-time consumer feedback left on platforms such as Google, GasBuddy, and Yelp provides a direct window into the customer experience. Retailers who possess the proper tools and an effective strategy are able to identify and correct low-performing locations to ensure they resonate with consumers—and avoid damaging the brand's reputation.

PRICE MATTERS, BUT WHAT ELSE?

Q: Why do you prefer your favorite stations and/or brands?
(choose all that apply)

	ALL	Male	Female
Quality of fuel	40%	40%	41%
Cleanliness	34%	31%	39%
Brand reputation	33%	34%	31%
Safe environment	31%	24%	42%
Good loyalty programs	28%	26%	30%
Speed of payment processing	27%	27%	26%
Customer service and employee quality	19%	17%	22%
Good lighting	17%	14%	23%
Company values	10%	11%	10%
Good coffee	9%	9%	7%
Selection of cold beverages	9%	8%	9%
Services (ATMs, air, squeegees, etc)	8%	9%	8%
Good food	5%	5%	4%
It has a car wash	4%	4%	4%

ANALYSIS: Customer experience matters. An investment in updated outdoor lighting, for example, may determine whether or not a retailer's stores appeal to female customers. Similarly, dirty stores and restrooms can alienate the more than 1-in-3 consumers who value cleanliness. That's why it's no surprise that 18% of respondents in an earlier 2018 GasBuddy survey³ said cleaner stores would influence them to eat more frequently at convenience retailers.

Retailers who monitor online ratings and reviews are well-positioned to make smart, strategic decisions about improvements to the customer experience. What do customers say—or not say? What does the experience at each location look like from the perspective of those who shop there? How do consumer perceptions of a retailer's brand compare to the competition? This information is essential when considering new investments, upgrades, and strategic initiatives.

BRING YOUNGER CONSUMERS INTO THE STORE

Q: Do you refuel your vehicle at the same gas station where you purchase food and/or beverages?

OVERALL



67% Yes
33% No

AGES 18 - 34



78% Yes
22% No

Q: Would a coupon for food and beverages on your mobile phone influence your decision to go inside the convenience store when you stop to refuel?

OVERALL



52% Yes
30% No
18% Undecided

AGES 18 - 34



71% Yes
17% No
12% Undecided

Q: Do you look at your mobile phone while refueling?

OVERALL



32% Yes
68% No

AGES 18 - 34



61% Yes
39% No

ANALYSIS: Consumers at the pump can be driven inside by intelligent, contextual ads delivered at the right time. Take full advantage of a consumer's visit by enticing them to make a purchase inside the store. The millennial demographic is more receptive to mobile offers at the pump than the overall population and therefore presents a huge opportunity for brands and retailers to deliver highly targeted and relevant offers.

HOW GASBUDDY CAN HELP YOUR BRAND CONNECT WITH CONSUMERS ALONG THE PATH TO PURCHASE

Ensure your stations are found no matter where consumers search

- Almost 60% of consumers choose a station while they're on the go. With the sustained growth in location-based searches it is more important than ever to have accurate and consistent listings
- GasBuddy Listings Management is the only listings management solution designed specifically for the fuel and convenience retailing industry
- Your location information is cleansed, verified and published to the most important search engines and digital maps including GasBuddy, Google, Apple, Waze, and more

Monitor real-time consumer feedback to inform strategic decisions

- Identify stations that perform poorly in overall quality, cleanliness, lighting, and other key categories
- Understand consumer feedback holistically, informing your strategy for upgrades and improvements
- Compare consumer perceptions of your stores to the competition and see how it may be impacting your foot traffic compared to surrounding stations

Deliver targeted messaging at highly contextual moments

- Connect with consumers when they are in proximity to your locations and stopped at the pumps
- Delivery targeted offers and deals that drive consumers into the store and influence purchases
- Utilize various channels to promote your brand and engage with consumers before they hit the road to influence where they stop

Attribute incremental foot traffic back to online initiatives

- Analyze footfall uplift and visitation trends to your locations as a result of your online campaigns
- Unlock in-depth customer insights based upon their behaviors and visitation patterns

1 <http://www.cspdailynews.com/fuels-50>

2 <http://www.cspdailynews.com/fuels-news-prices-analysis/fuels-news/articles/fuels-50-2018-how-consumers-choose-their-gas-stops>

3 <https://business.gasbuddy.com/wp-content/uploads/2018/04/Foodservice-and-Consumer-Habits-GasBuddy-Report.pdf>



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