GasBuddy examined more than 20 million consumer visits to fuel and convenience retailers between July 1 and September 30, 2018. This data provides actionable insights into consumer behavior and the factors that influence foot traffic.

HIGHLIGHTS:

**Costco Claims the Top Spot in the U.S.**
Washington–based Costco (250 - 999 locations) captured the most foot traffic per station of any brand in any category—nearly five times the industry average. Other category winners include Ohio–based Speedway (1,000+ locations), Kentucky–based Thorntons (50 - 249 locations), and Indiana–based Ricker’s (30 - 49 locations).

**Pilot and Wawa Tie for #1 in the Most States**
Claiming the highest average footfall in five states, Wawa once again shares the top spot—although it now does so with Pilot. Previous winner Cumberland Farms falls to second place with Costco, each claiming wins in four states. Speedway once again secures a close third with three states.

**Lunchtime Brings in More Customers**
The noon lunch hour was the busiest hour of the day during Q3—claiming 8% of visits. The single busiest time was Friday at 12:00pm, followed by Friday at 5:00pm, Saturday at 12:00pm, Friday at 4:00pm, and Sunday at 12:00pm.

**Great Employees Sell More**
Gas stations and convenience stores with above-average customer service ratings experienced 32% more visits than their below-average counterparts. Similar correlations were observed with ratings for outdoor lighting, cleanliness, and overall customer experience.

**Long Weekends Great for Gas Stations**
As summer drew to a close, motorists took to the roads for one last getaway. Hotels experienced a 57% uplift compared to the previous weekend, and Wyndham led the pack with a 75% increase in visits. Hampton Inn finished in a close second with 72% uplift, and La Quinta rounded out third with 69%. Other strong performers included auto rentals (32%), gas stations (24%), and coffee shops (22%)
FOOT TRAFFIC RANKINGS

Which brands captured the highest average footfall per station?

GasBuddy examined more than 20 million consumer trips to gas stations and convenience stores during Q3 2018. The following brands attracted the highest average footfall within their respective categories.

The Rankings

- 1,000+ locations
- 250 – 999 locations
- 50 – 249 locations
- 30 – 49 locations

Methodology

The footfall ratio equals average footfall per location / average footfall for the industry. A brand on par with the industry average would have a ratio of 1.0.
**Methodology**
The footfall ratio equals average footfall per location / average footfall for the industry. A brand on par with the industry average would have a ratio of 1.0.

**TOP 10**
1,000+ Locations

1. **Speedway** 2.38
2. **ARCO** 1.84
3. **Circle K** 1.45
4. **7-Eleven** 1.22
5. **Murphy USA** 1.20
6. **76** 1.11
7. **Shell** 1.02
8. **Mobil** 0.96
9. **BP** 0.94
10. **Marathon** 0.93

Data from July 1 - September 30, 2018
▲▼ Change from Q2 2018
**TOP 10**
250 - 999 Locations

1. **Costco**
   - Footfall Ratio: 4.74

2. **Pilot**
   - Footfall Ratio: 3.45

3. **Love’s**
   - Footfall Ratio: 2.95
   - Change from Q2 2018: ▲

4. **Kroger**
   - Footfall Ratio: 2.94

5. **Sam’s Club**
   - Footfall Ratio: 2.71
   - Change from Q2 2018: ▼

6. **Wawa**
   - Footfall Ratio: 2.53

7. **Sheetz**
   - Footfall Ratio: 2.34

8. **QuikTrip**
   - Footfall Ratio: 2.17
   - Change from Q2 2018: ▲

9. **RaceTrac**
   - Footfall Ratio: 1.92
   - Change from Q2 2018: ▼

10. **Safeway**
    - Footfall Ratio: 1.81

**Methodology**
The footfall ratio equals average footfall per location / average footfall for the industry. A brand on par with the industry average would have a ratio of 1.0.

Data from July 1 - September 30, 2018
▲▼ Change from Q2 2018
TOP 10
50 - 249 Locations

1. Thorntons 4.06
2. Meijer 3.50
3. United Dairy Farmers 3.35
4. Family Express 3.10
5. Flying J 2.99
6. GetGo 2.98
7. Duchess ▲ 2.43
8. Fred Meyer NEW! ▲ 2.24
9. Smith’s ▲ 2.04
10. Fry’s NEW! ▲ 1.99

Methodology
The footfall ratio equals average footfall per location / average footfall for the industry. A brand on par with the industry average would have a ratio of 1.0.

Data from July 1 - September 30, 2018 ▲ ▼ Change from Q2 2018
<table>
<thead>
<tr>
<th>Rank</th>
<th>Brand</th>
<th>Footfall Ratio</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Ricker’s</td>
<td>3.56</td>
</tr>
<tr>
<td>2</td>
<td>Buc-ee’s</td>
<td>3.42</td>
</tr>
<tr>
<td>3</td>
<td>On The Run St. Louis</td>
<td>2.45</td>
</tr>
<tr>
<td>4</td>
<td>Lassus Handy Dandy</td>
<td>2.28</td>
</tr>
<tr>
<td>5</td>
<td>J&amp;H Family Stores</td>
<td>2.22</td>
</tr>
<tr>
<td>6</td>
<td>Road Ranger</td>
<td>2.00</td>
</tr>
<tr>
<td>7</td>
<td>PS Food Mart</td>
<td>1.63</td>
</tr>
<tr>
<td>8</td>
<td>MotoMart</td>
<td>1.48</td>
</tr>
<tr>
<td>9</td>
<td>Dillon Stores</td>
<td>1.23</td>
</tr>
<tr>
<td>10</td>
<td>Rotten Robbie</td>
<td>1.08</td>
</tr>
</tbody>
</table>

**Methodology**
The footfall ratio equals average footfall per location / average footfall for the industry. A brand on par with the industry average would have a ratio of 1.0.

Data from July 1 - September 30, 2018
▲ ▼ Change from Q2 2018
FOOT TRAFFIC RANKINGS BY STATE
Which brands captured the highest average footfall in each state?

Results based on brands with a minimum of 20 stations per state; average footfall = total footfall/number of stations.
WHEN DO GASBUDDIES VISIT GAS STATIONS?

Location data from Q3 2018 reveals that the noontime lunch hour was especially busy for fuel and convenience retailers. Friday at 12:00pm received the largest share of visits—followed by Friday at 5:00pm and Saturday at 12:00pm.

Do your products have top-of-mind awareness?

Convenience stores have become destinations for foodservice—whether that means a full meal, a few quick snacks, or a cup of coffee on the drive to work. Although the Q3 2018 heatmap shows peak hours of breakfast, lunch, and the evening commute, consumers who work non-traditional hours are apt to rely on convenience stores since many are open 24/7. Top-of-mind brand awareness is essential no matter when they stop.

Unfortunately for brands, today’s customers are also drowning in choices. It’s difficult to stand out when CPG brands are merchandised with a few dozen or more substitute products. Decision fatigue removes the desire to explore beyond past behavior.

To grow their share of wallet, brands must reach consumers with relevant messaging at the right time. Millions of drivers engage with GasBuddy during their path to purchase, and our Shopper Marketing solutions help brands convert impulse buys into planned purchases.

To learn more, visit business.gasbuddy.com or email GBforBrands@gasbuddy.com.
CATCH THEM WHILE YOU CAN
During Q3 2018, the average dwell time at gas stations and convenience stores was 7 minutes and 40 seconds.

- 5 minutes or less 44.88%
- 5 - 10 minutes 29.77%
- 10 - 15 minutes 11.40%
- 15 minutes or more 13.90%

TOP 5 BUSIEST DAYS & TIMES
- FRI: 12:00 PM, 4:00 PM, 5:00 PM
- SAT: 12:00 PM
- SUN: 12:00 PM

BUSIEST DAYS
1. FRI
2. SAT
3. THU
4. TUE
5. WED
6. SUN
7. MON

LEAST BUSY TIMES DURING WORK WEEK (Mon - Fri, 8am - 8pm)
- MON: 8:00 AM
- TUE: 8:00 AM
- WED: 8:00 AM
- THU: 8:00 AM
- FRI: 8:00 AM
RATINGS AND FOOT TRAFFIC

How do above and below-average stations fare in terms of foot traffic?

More than 2 million individual ratings were submitted by GasBuddy users in Q3 2018. This real-time consumer feedback not only provides retailers with insight into the customer experience at their stores, but is reflective of the fact that today’s customers care about quality—and tend to vote with their feet.

We conducted an analysis to determine how the foot traffic at stations with above and below-average ratings differs from the industry average.

<table>
<thead>
<tr>
<th>Index</th>
<th>Above-Average Stations</th>
<th>Below-Average Stations</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overall</td>
<td>7.38%</td>
<td>-13.04%</td>
</tr>
<tr>
<td>Customer Service</td>
<td>8.91%</td>
<td>-17.47%</td>
</tr>
<tr>
<td>Cleanliness</td>
<td>8.65%</td>
<td>-14.19%</td>
</tr>
<tr>
<td>Outdoor Lighting</td>
<td>8.85%</td>
<td>-17.88%</td>
</tr>
<tr>
<td>Coffee</td>
<td>2.58%</td>
<td>-5.30%</td>
</tr>
<tr>
<td>Restrooms</td>
<td>1.74%</td>
<td>-3.00%</td>
</tr>
</tbody>
</table>

Analysis: Digital ratings provide real-time access to customer perceptions of your stores. Does the experience resonate with them, or do they think they’re dirty, boring, and unexceptional? How does your brand compare to your competitors? Are there outliers within your brand that fall short of company standards? Today’s consumers have many choices, and brands need to know where they stand. According to a recent survey of more than 15,000 GasBuddy users, over 82% of respondents say that “store design and upkeep” has a strong or moderate influence on their decision to go inside after refueling.

Are you interested in obtaining these insights for your stations? The Reputation Management solution from GasBuddy Business Pages can help. For more information, visit business.gasbuddy.com or email pages@gasbuddy.com
Labor Day Travel Trends
Where do travelers stop to dine, sleep, and refuel during the Labor Day weekend?

As the summer drew to a close, many individuals took to the roads for one more weekend getaway. GasBuddy analyzed the trips of long-distance travelers — meaning those who traveled 400 miles or more between August 31 and September 3—to reveal key points of interest. Hotels saw the largest increase in footfall from roadtrippers as the overall category experienced a 57% uplift in visits compared to the prior weekend.

<table>
<thead>
<tr>
<th>TRAVEL</th>
<th>DINING</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gas Stations</td>
<td>Quick Service Restaurants</td>
</tr>
<tr>
<td>Category uplift 24%</td>
<td>Category uplift 18%</td>
</tr>
<tr>
<td><img src="image" alt="BP" /></td>
<td><img src="image" alt="Hardee's" /></td>
</tr>
<tr>
<td>1. BP ▲30%</td>
<td>1. Hardee’s ▲42%</td>
</tr>
<tr>
<td><img src="image" alt="Phillips 66" /></td>
<td><img src="image" alt="In-N-Out Burger" /></td>
</tr>
<tr>
<td>2. Phillips 66 ▲27%</td>
<td>2. In-N-Out Burger ▲32%</td>
</tr>
<tr>
<td><img src="image" alt="Murphy USA" /></td>
<td><img src="image" alt="McDonald’s" /></td>
</tr>
<tr>
<td>3. Murphy USA ▲26%</td>
<td>3. McDonald’s ▲27%</td>
</tr>
<tr>
<td>Hotels</td>
<td>Casual Dining Restaurants</td>
</tr>
<tr>
<td>Category uplift 57%</td>
<td>Category uplift 20%</td>
</tr>
<tr>
<td><img src="image" alt="Wyndham" /></td>
<td><img src="image" alt="Cracker Barrel" /></td>
</tr>
<tr>
<td>1. Wyndham ▲75%</td>
<td>1. Cracker Barrel ▲66%</td>
</tr>
<tr>
<td><img src="image" alt="Hampton Inn" /></td>
<td><img src="image" alt="Denny’s" /></td>
</tr>
<tr>
<td>2. Hampton Inn ▲72%</td>
<td>2. Denny’s ▲34%</td>
</tr>
<tr>
<td><img src="image" alt="La Quinta" /></td>
<td><img src="image" alt="IHOP" /></td>
</tr>
<tr>
<td>3. La Quinta ▲69%</td>
<td>3. IHOP ▲30%</td>
</tr>
<tr>
<td>Auto Rental</td>
<td>Coffee Shops</td>
</tr>
<tr>
<td>Category uplift 32%</td>
<td>Category uplift 22%</td>
</tr>
<tr>
<td><img src="image" alt="AVIS" /></td>
<td><img src="image" alt="Tim Hortons" /></td>
</tr>
<tr>
<td>1. AVIS ▲38%</td>
<td>1. Tim Hortons ▲28%</td>
</tr>
<tr>
<td><img src="image" alt="Hertz" /></td>
<td><img src="image" alt="Dunkin Donuts" /></td>
</tr>
<tr>
<td>2. Hertz ▲35%</td>
<td>2. Dunkin Donuts ▲25%</td>
</tr>
<tr>
<td><img src="image" alt="Budget" /></td>
<td><img src="image" alt="Starbucks" /></td>
</tr>
<tr>
<td>3. Budget ▲31%</td>
<td>3. Starbucks ▲20%</td>
</tr>
</tbody>
</table>

Results reflect the uplift from Memorial Day weekend (08/31 - 09/03) over the previous weekend (08/24 - 08/27)

Fuel and convenience store customers frequent many other businesses and GasBuddy works with brands to boost incremental sales using targeted campaigns and first-party, GPS-based data. Position your brand top-of-mind and drive consumers to your locations while they are on the road. Contact GBforBrands@gasbuddy.com for more information.
About GasBuddy
GasBuddy is a company that connects drivers with their Perfect Pit Stop. As the leading source for crowdsourced, real-time fuel prices at more than 150,000 gas station convenience stores in the U.S., Canada and Australia, millions of drivers use the GasBuddy app and website every day to find gas station convenience stores based on fuel prices, location and ratings/reviews. GasBuddy’s first-of-its-kind fuel savings program, Pay with GasBuddy, has saved Americans more than $3.6 million at the pumps since its launch in 2017. The company’s business solutions suite, GasBuddy Business Pages, provides Fuel Marketers and Retailers their best opportunity to maintain their station information, manage their brand, and promote to their target consumer audience. For more information, visit www.gasbuddy.com.

Methodology
From July 1 to September 30, 2018, GasBuddy analyzed location visit data at more than 100 fuel and convenience store brands across the United States to understand foot traffic trends, provide geo-behavioral and consumer insights, and identify the impact of key factors such as ratings and reviews on POI visits. To be considered a “visit,” a user must be within 30 meters of a fuel pump for between 2 and 30 minutes.

GasBuddy works in collaboration with Cuebiq, a next generation location intelligence and measurement company, which leverages the largest database of accurate and precise location data in the U.S. to help marketers map and measure the consumer journey. Its leading data intelligence platform analyzes location patterns of 61 million monthly active U.S. smartphone users on over 180 mobile apps, allowing businesses to glean actionable insights about real-world consumer behaviors and trends. Cuebiq does not collect any personally identifiable information. Its privacy-sensitive methodology has earned the company membership status with the Network Advertising Initiative (NAI), the leading self-regulatory industry association dedicated to responsible data collection and its use for digital advertising. Cuebiq is headquartered in New York with offices in San Francisco, Chicago, Italy, and China.