



Market Research Study – Gas & Convenience Store 2021

July 2021

Executive Summary

Survey Data from April 27th, 2021 – May 27th, 2021



HIGH LEVEL RESULTS

- About 36% of responders are primarily familiar with 7-Eleven.
- From our survey, we see 29% of responders purchase Chips and Candy from convenience stores.
- About 23% of responders go to convenience stores for food about once a month.



KEY AUDIENCE PROFILES

Consumer Who Visit Stripes:

- Adults 55-65
- Household Income of 60-75k
- Ethnicity breakdown as follows: **55% Caucasian, 17% Hispanic, 18% African American, 9% Asian**
- Have interests in: Restaurants, Online Shopping, and Cooking

Consumer Who Visit 7-Eleven

- Adults: 55-75
- Have Household Income of 100k+
- Ethnicity breakdown as follows: 55% Caucasian, 17% Hispanic, 18% African American, 9% Asian
- Have interests in: Restaurants, Online Shopping, Cooking

Consumers who visit Circle K:

- Adults 55-75
- Household Income of 60-75k
- Ethnicity breakdown as follows: 55% Caucasian, 17% Hispanic, 18% African American, 9% Asian
- Have interests in: Baking, Cooking, Restaurants



MULTICULTURAL HIGHLIGHTS

- Ethnicity breakdown for Survey: **58% Caucasian, 17% Hispanic, 14% African American, 11% Asian.**
- Responses closely align with the latest US Census data from April 2020 (**60% Caucasian, 19% Hispanic, 13% African American, 8% Asian**).
- 42% of African American, 37% of Hispanic, and 35% of Asian responders are familiar with 7-Eleven.
- Across all ethnicities, most responders purchase chips and candy from convenience stores.
- 28% of Hispanic responders visit convenience stores once a month.

SURVEY RESULTS

7-Eleven and Circle K Have The Most Awareness

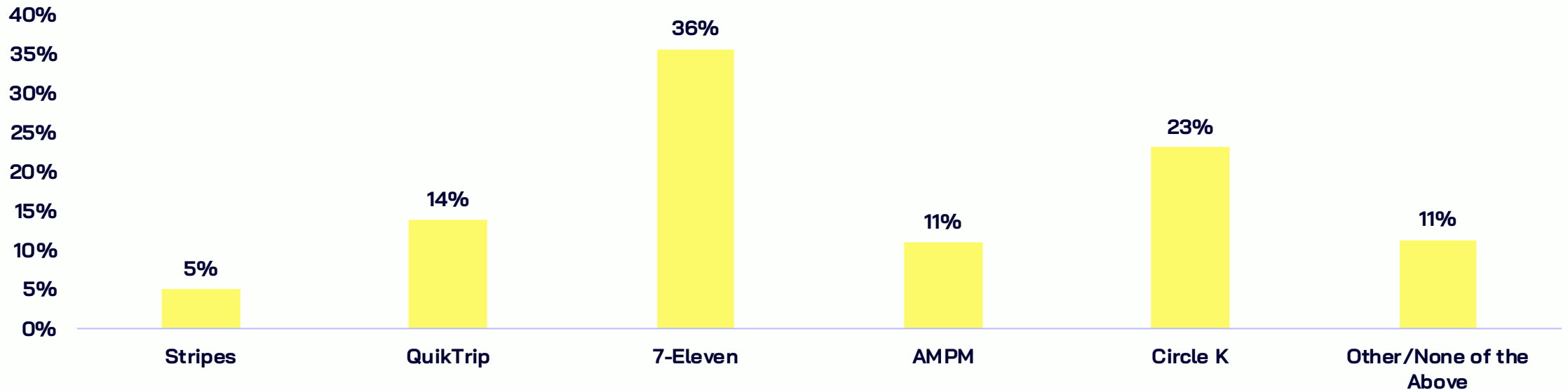
36% of consumers are familiar with 7-Eleven, followed closely by 23% familiarly with Circle K

Recommendation:

- Execute a Custom Zeta Market Research Survey to understand why consumers are more familiar with 7-Eleven and Circle K than your brand.



**Q1 – Which Of The Following Convenience Store Brands Are You Aware Of?
(Select All That Apply)**



Chips and Candy Are the Primary Purchase

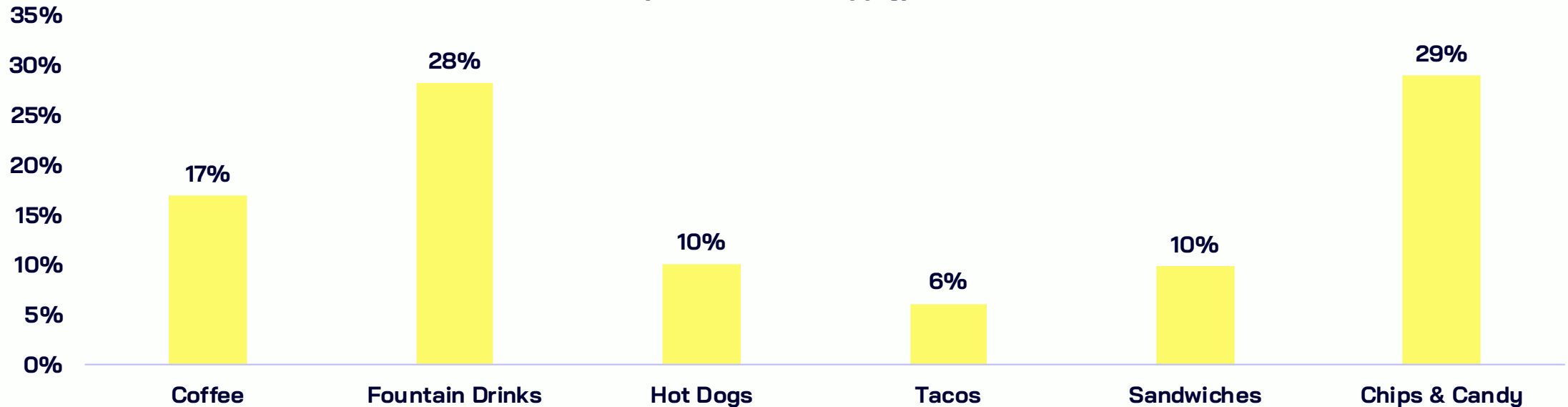
29% of consumers primarily purchase chips and candy at convenience stores, followed closely by fountain drinks

Recommendation:

- Leverage Zeta's Intelligent Datasets and target convenience store consumers highlighting snack products and drinks to drive increased visitation



Q2 – What Do You Normally Purchase From A Convenience Store?
(Select All That Apply)



Convenience Store Visits Are Few

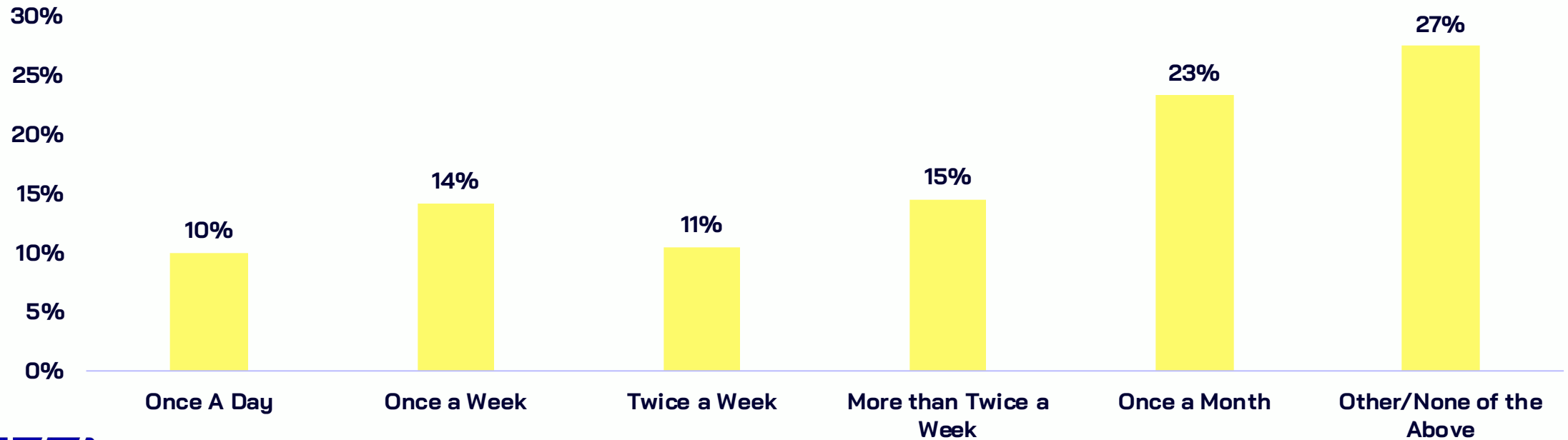
23% of consumers visit convenience stores about once a month. Visits weekly or more make up 24% of respondents.

Recommendation:

- Leverage Zeta’s Intelligent location datasets to target and drive convenience store consumers back in-store



**Q3 – How Often Do You Visit A Convenience Store To Buy Food?
(Select One)**





CONSUMER INTENT ANALYSIS

Chips, Candy & Fountain Drinks are Preferred Products Across Stores

Stripes consumers purchase coffee, hot dog, and taco's the most, whereas 7-Eleven consumers purchase fountain drinks, chips and candy.

Recommendation:

- Align creatives to the preferred products.

Q2 – What Do You Normally Purchase From A Convenience Store?

Read in this direction →

Q1 – Which Of The Following Convenience Store Brands Are You Aware Of?

	Coffee	Fountain Drinks	Hot Dogs	Tacos	Sandwiches	Chips & Candy
Stripes	17%	21%	14%	13%	13%	22%
QuikTrip	16%	24%	12%	9%	13%	25%
7-Eleven	15%	27%	11%	8%	12%	28%
AMPM	16%	23%	13%	11%	13%	24%
Circle K	15%	26%	12%	8%	12%	27%
Other/None of the Above	16%	23%	13%	11%	13%	25%

Stripes Drives the Highest Visitation Compared to Other Convenience Store Brands

Stripes visitors tend to visit more than twice a week which is a larger percentage than any other convenience store, whereas 7-Eleven customers visit only once a month

Recommendation:

- Invest in campaigns that reward customers on brand loyalty.

Q3 – How Often Do You Visit A Convenience Store To Buy Food?

Read in this direction →

Q1 – Which Of The Following Convenience Store Brands Are You Aware Of?

	Once a Day	Once a Week	Twice a Week	More than Twice a Week	Once a Month	Other/None of the Above
Stripes	18%	11%	10%	22%	13%	26%
QuikTrip	14%	13%	11%	21%	17%	24%
7-Eleven	13%	14%	11%	16%	21%	25%
AMPM	18%	10%	10%	20%	14%	27%
Circle K	12%	14%	11%	20%	19%	24%
Other/None of the Above	13%	12%	8%	17%	17%	33%

Visitors Aren't Strictly Aligned to a Specific Convenience Store Brand

Stripes visitors are most likely to also visit 7-Eleven. 7-Eleven visitors are most likely to also visit Circle K.

Recommendation:

- Compare products/pricing to 7-Eleven.

Q1 – Which Of The Following Convenience Store Brands Are You Aware Of?

Read in this direction →

	Stripes	QuikTrip	7-Eleven	AMPM	Circle K	Other/None of the Above
Stripes	1%	18%	27%	14%	22%	18%
QuikTrip		2%	34%	13%	27%	14%
7-Eleven			12%	14%	30%	15%
AMPM				1%	24%	16%
Circle K					1%	13%
Other/None of the Above						9%

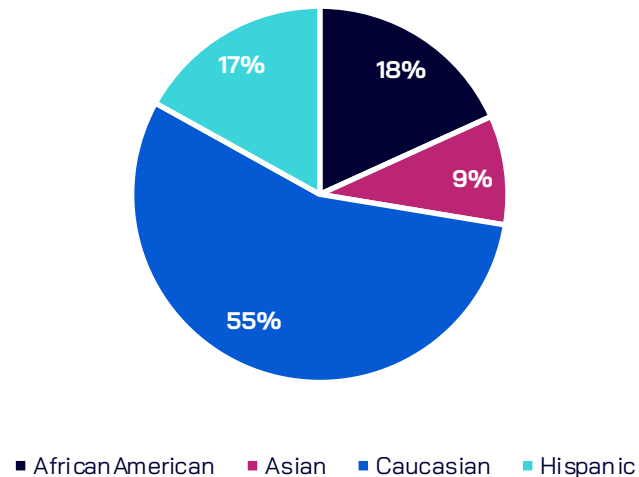
MULTICULTURAL INSIGHTS

Ethnicity Breakdown (Overall)

From our survey responders, the ethnicity breakdown is as follows: 58% Caucasian, 17% Hispanic, 14% African American, 11% Asian. Responses closely align with the latest US Census data from April 2020.

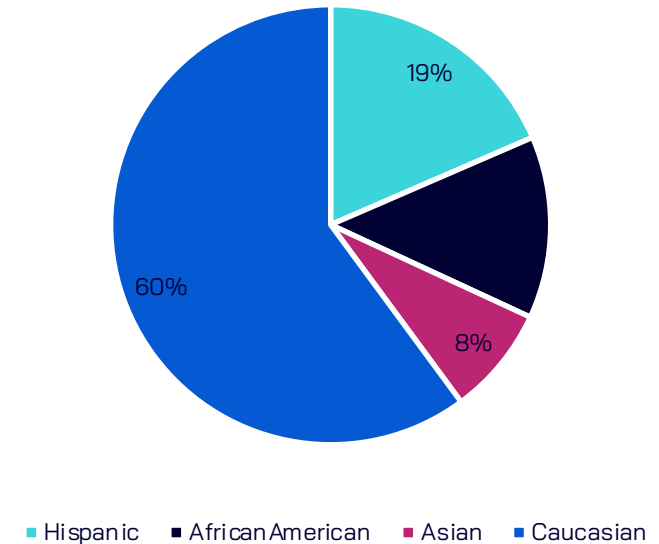
Recommendation: For your direct response and awareness efforts, consider adding a multicultural layer to your campaigns by running additional budget targeting Hispanic, African American, and Asian users. Also, tailor creative messaging towards each ethnicity to grab their attention and help them consider your hotel over the competition.

Convenience Store Survey Ethnicity Breakdown



*Source: Zeta 1st Party Data

US Census Ethnicity Breakdown**



**Source: US Census Data, April 2020



Ethnicity Breakdown (By Q1 Response)

Q1 - Which of the following convenience store brands are you aware of?

	Stripes	Quiktrip	7-Eleven	AMPM	Circle K	Other/None of the Above
African American	5%	12%	42%	10%	21%	10%
Asian	6%	13%	35%	9%	22%	15%
Caucasian	5%	12%	37%	9%	23%	14%
Hispanic	5%	14%	37%	8%	21%	14%

Key Takeaways:

- 42% of African American, 37% of Hispanic, and 35% of Asian responders are familiar with 7-Eleven
- 14% of Hispanic responders are familiar with Quiktrip, more than any other demographic

Recommendation:

- Push harder against 7-Eleven with all demographics.
- Create a campaign against Quiktrip for Hispanic consumers.



Ethnicity Breakdown (By Q2 Response)

Q2 – What Do You Normally Purchase From A Convenience Store?

	Coffee	Fountain Drinks	Hot Dogs	Tacos	Sandwiches	Chips & Candy
African American	15%	26%	10%	8%	7%	34%
Asian	12%	27%	11%	8%	14%	28%
Caucasian	16%	28%	9%	6%	10%	31%
Hispanic	15%	25%	11%	10%	9%	30%

Key Takeaways:

- 34% of African American, 30% of Hispanic, and 28% of Asian responders generally buy chips and candy from convenience stores.
- 14% of Asian responders purchase sandwiches from convenience stores.

Recommendation:

- Promote deals with chips and candy at all demographics.
- Promote sandwich deals towards Asian consumers.

Ethnicity Breakdown (By Q3 Response)

Q3 – How Often Do You Visit A Convenience Store To Buy Food?

	Once a Day	Once a Week	Twice a Week	More than Twice a Week	Once a Month	Other/None of the Above	Once a Day
African American	5%	16%	11%	14%	19%	35%	5%
Asian	8%	15%	14%	11%	17%	35%	8%
Caucasian	6%	17%	11%	15%	22%	28%	6%
Hispanic	8%	19%	7%	10%	28%	28%	8%

Key Takeaways:

- 35% of African American, 28% of Hispanic, and 35% of Asian responders chose Other/None of the Above.
- 28% of Hispanic responders visit convenience stores for food once a month.

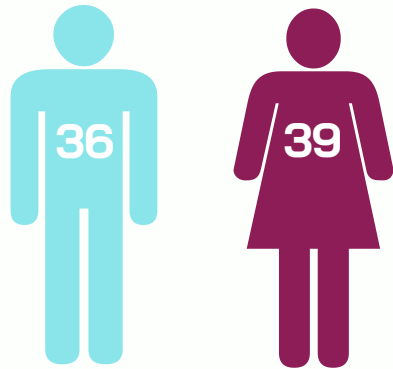
Recommendation:

- Target Hispanic audiences to try and pull them into convenience stores more often.
- Push more frequent visits to Caucasian consumers, who are most likely to visit more than twice a week.

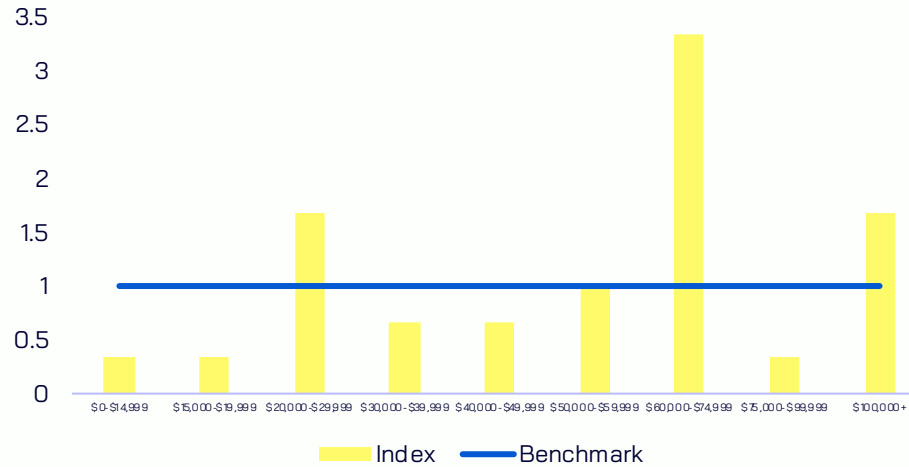
AUDIENCE PROFILES

Stripes

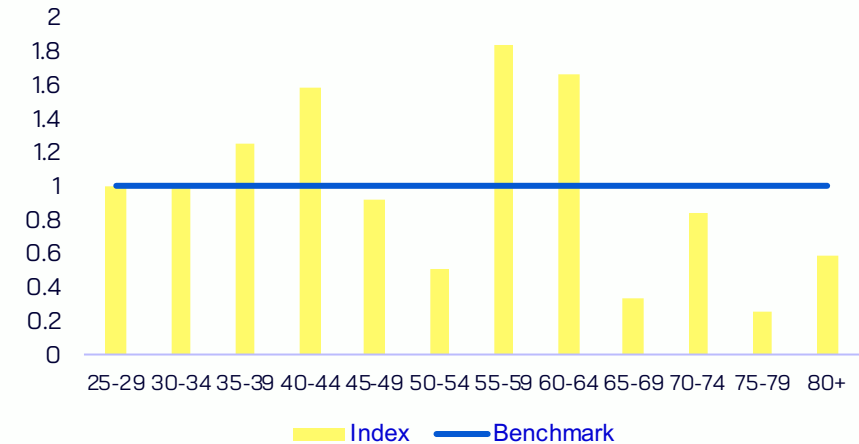
Responders who visit Stripes



Income



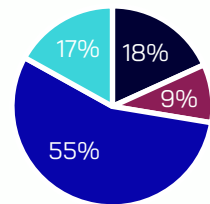
Age



Consumers familiar with Stripes:

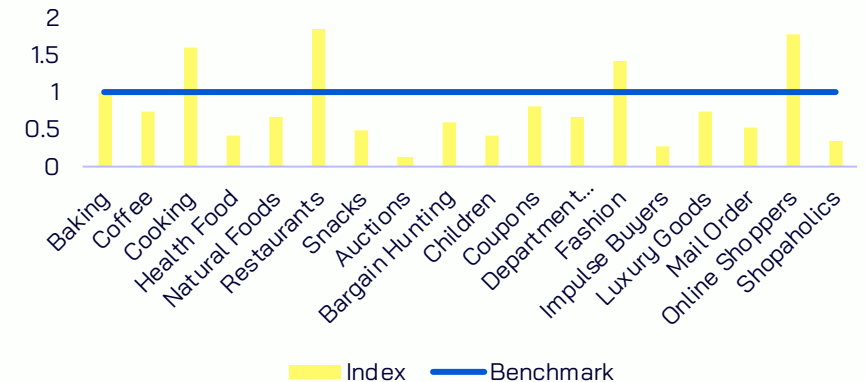
- Are majority Adults 55-65
- Have Household Income of 60-75k
- Have the ethnicity breakdown as follows:
55% Caucasian, 17% Hispanic, 18% African American, 9% Asian
- Have interests in: Restaurants, Online Shopping, and Cooking

Convenience Store Survey
Ethnicity Breakdown



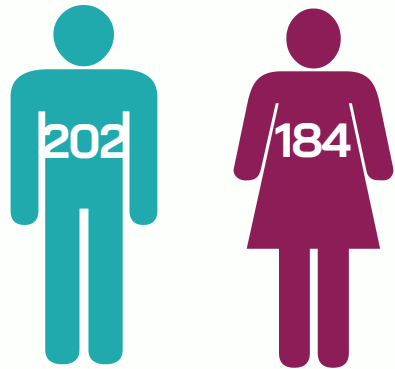
■ African American ■ Asian ■ Caucasian ■ Hispanic

Interest



7-Eleven

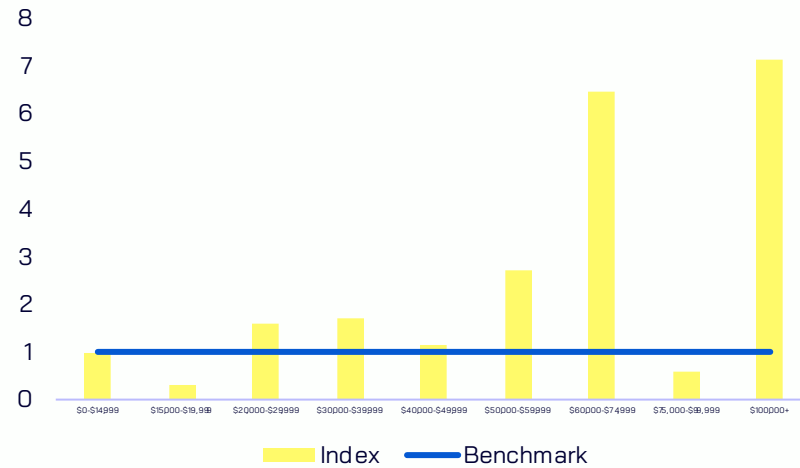
Responders who visit 7-Eleven



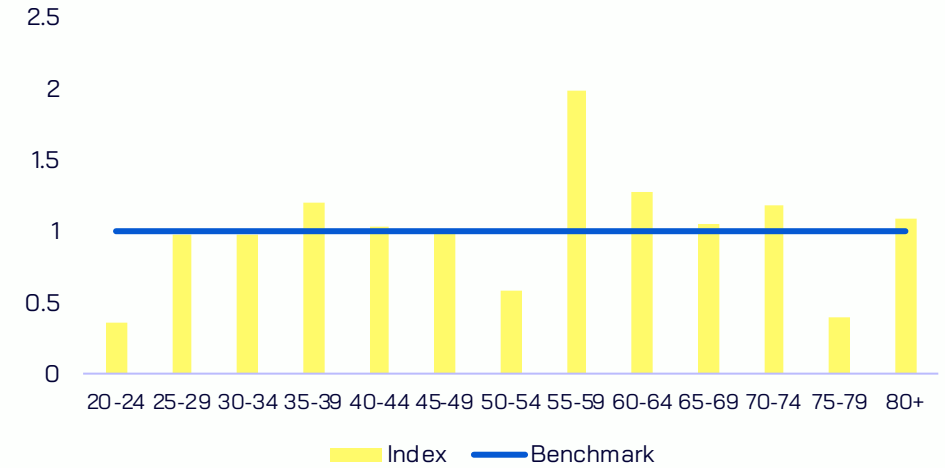
Consumers familiar with 7-Eleven:

- Are majority Adults 55-75
- Have Household Income of 100k+
- Have the ethnicity breakdown as follows: 55% Caucasian, 17% Hispanic, 18% African American, 9% Asian
- Have interests in: Restaurants, Online Shopping, Cooking

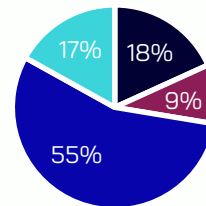
Income



Age

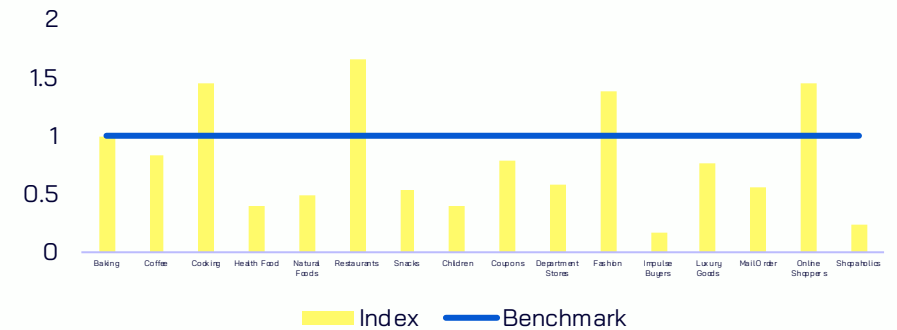


Convenience Store Survey Ethnicity Breakdown



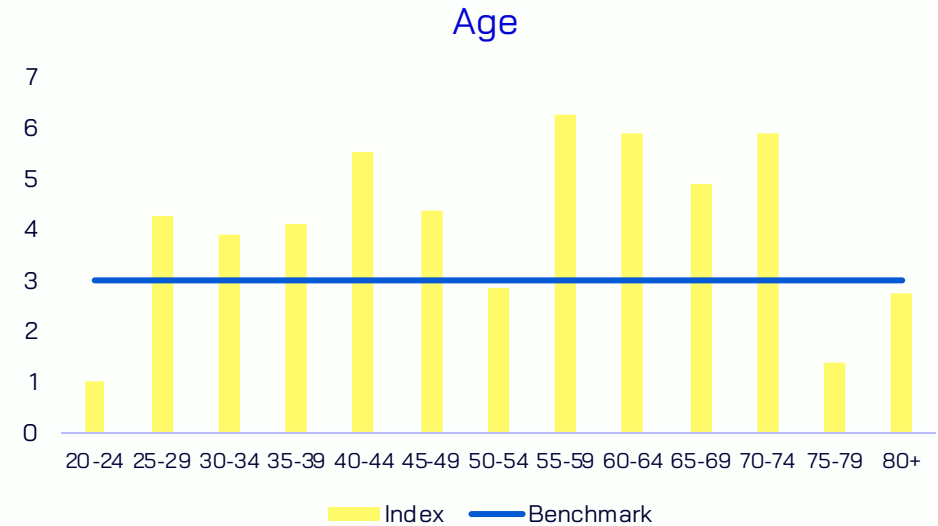
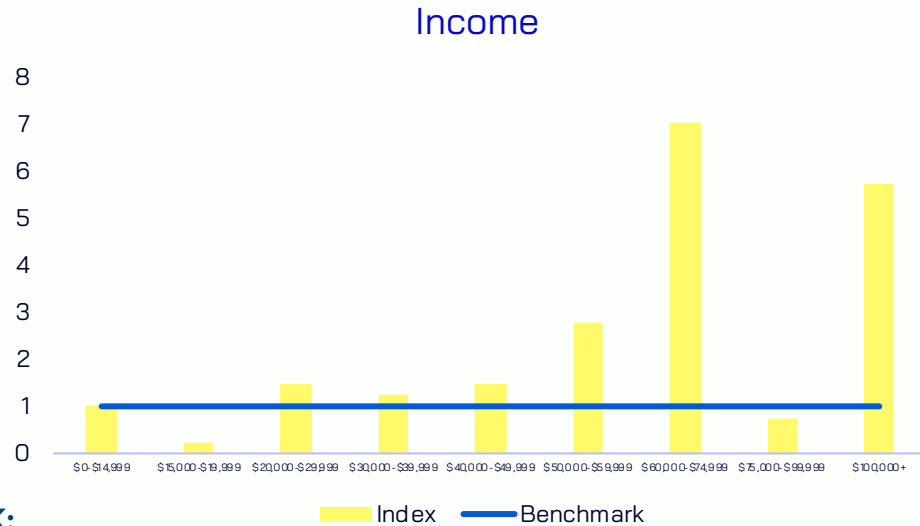
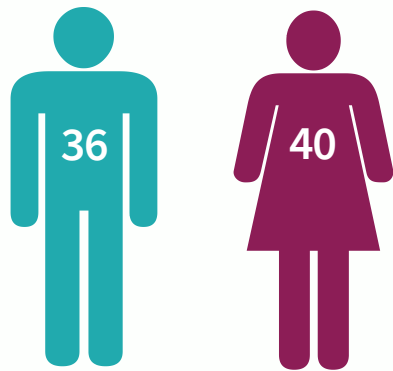
■ African American ■ Asian ■ Caucasian ■ Hispanic

Interests



Circle K

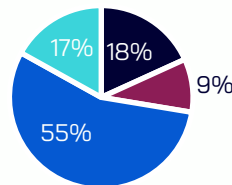
Responders who Visit Circle K



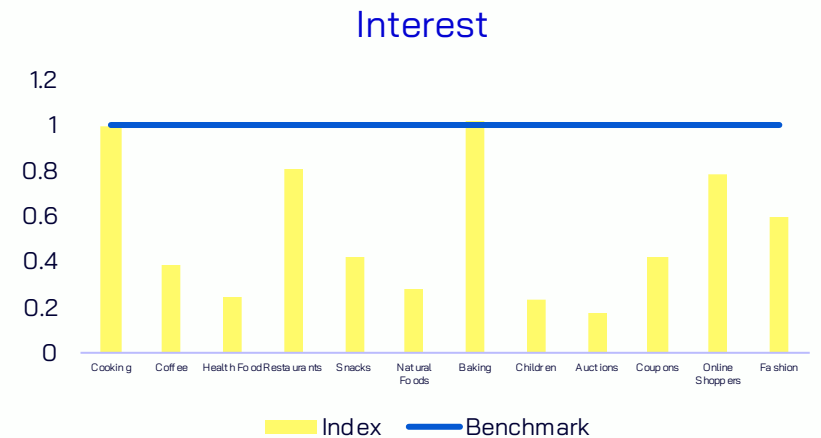
Consumers familiar with Circle K:

- Are majority Adults 55-75
- Have Household Income of 60-75k
- Have the ethnicity breakdown as follows: 55% Caucasian, 17% Hispanic, 18% African American, 9% Asian
- Have interests in: Baking, Cooking, Restaurants

Convenience Store Survey Ethnicity Breakdown

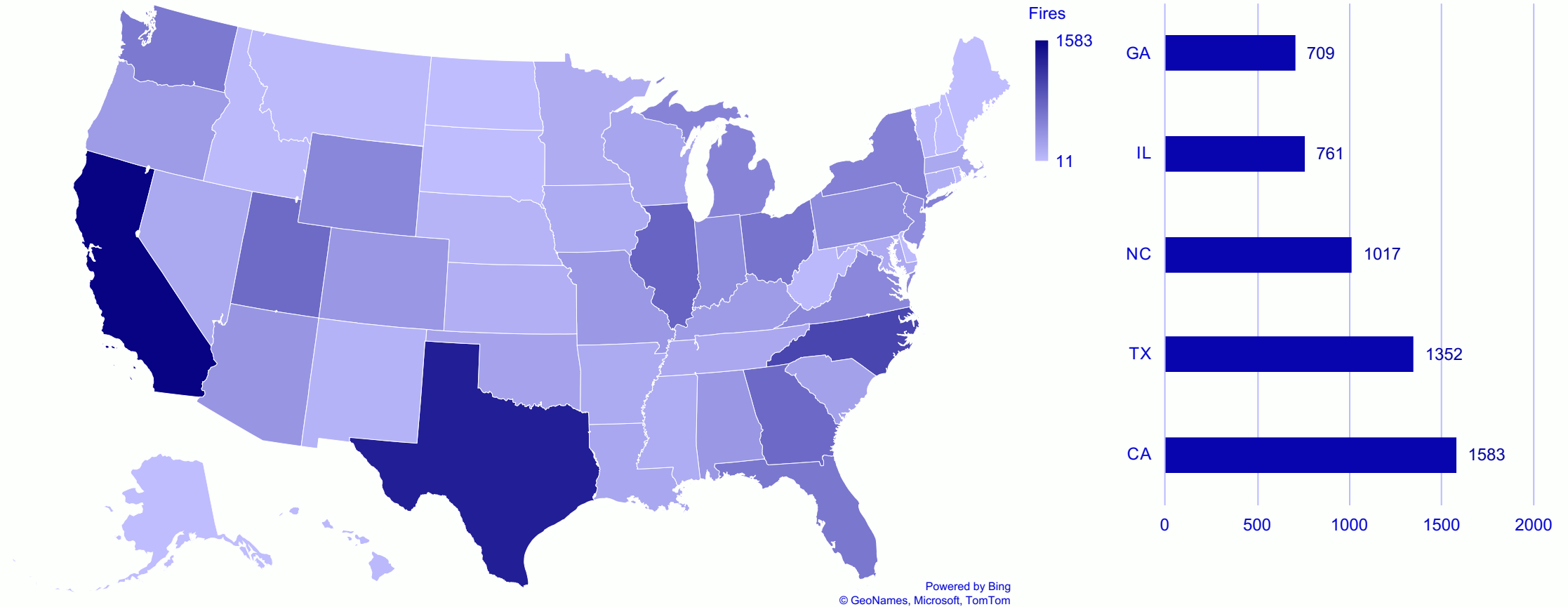


■ African American ■ Asian ■ Caucasian ■ Hispanic

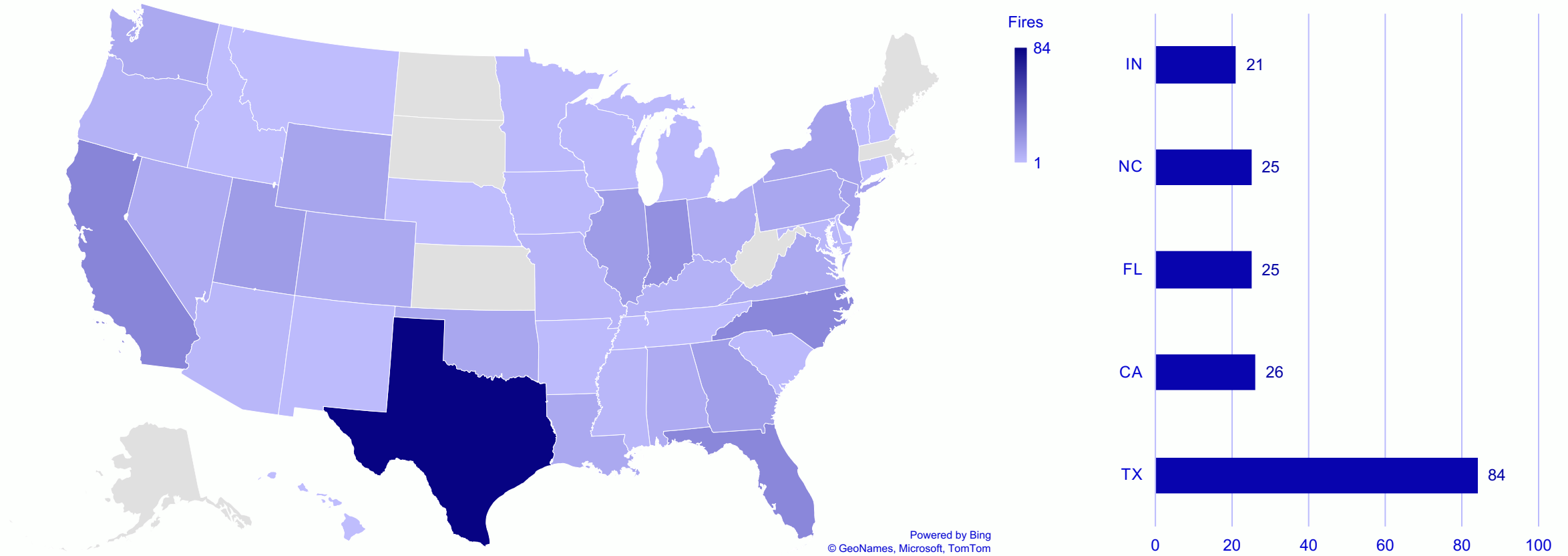


*Source: Zeta 1st Party Data

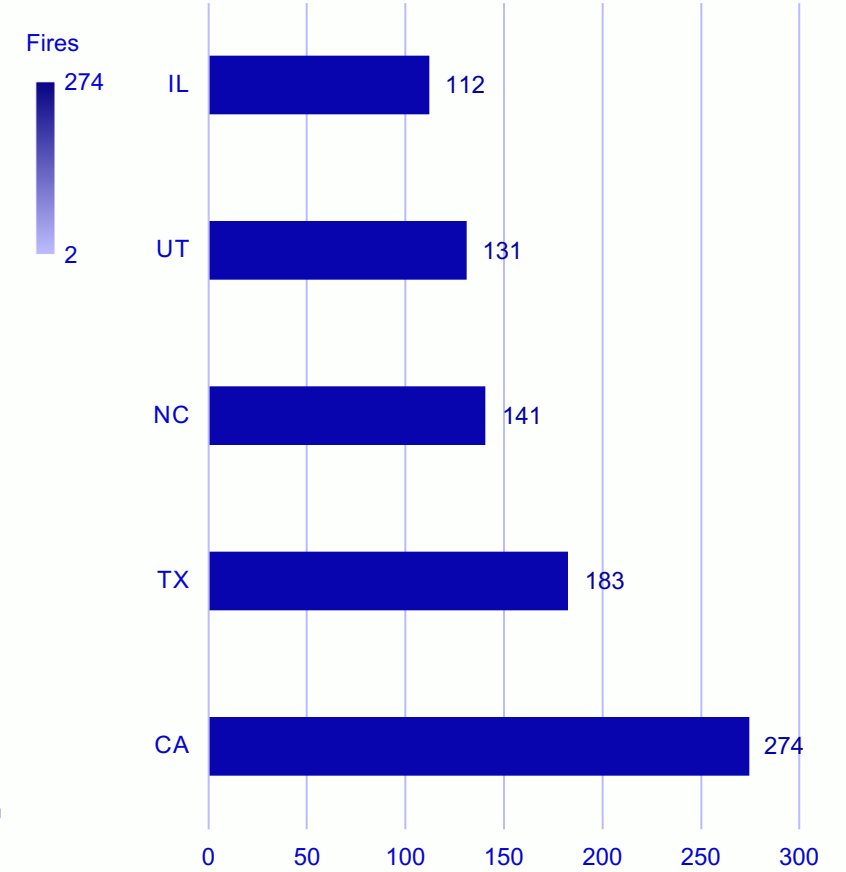
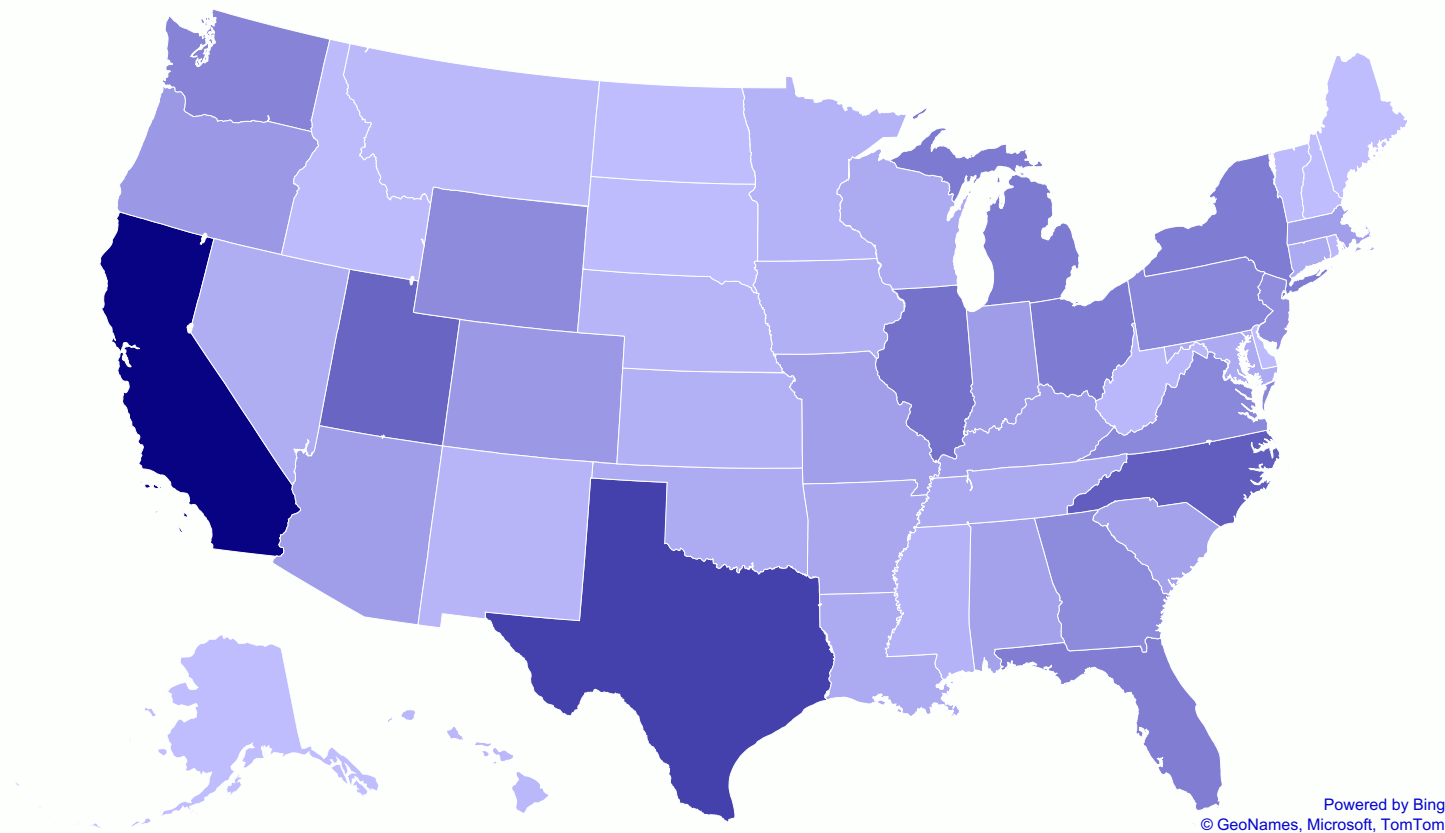
Overall Responses by State



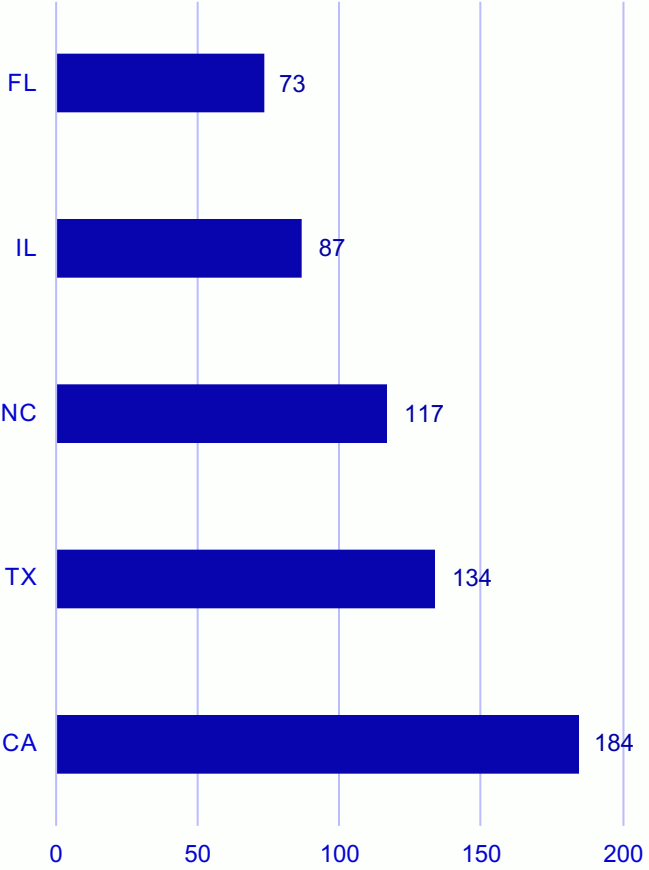
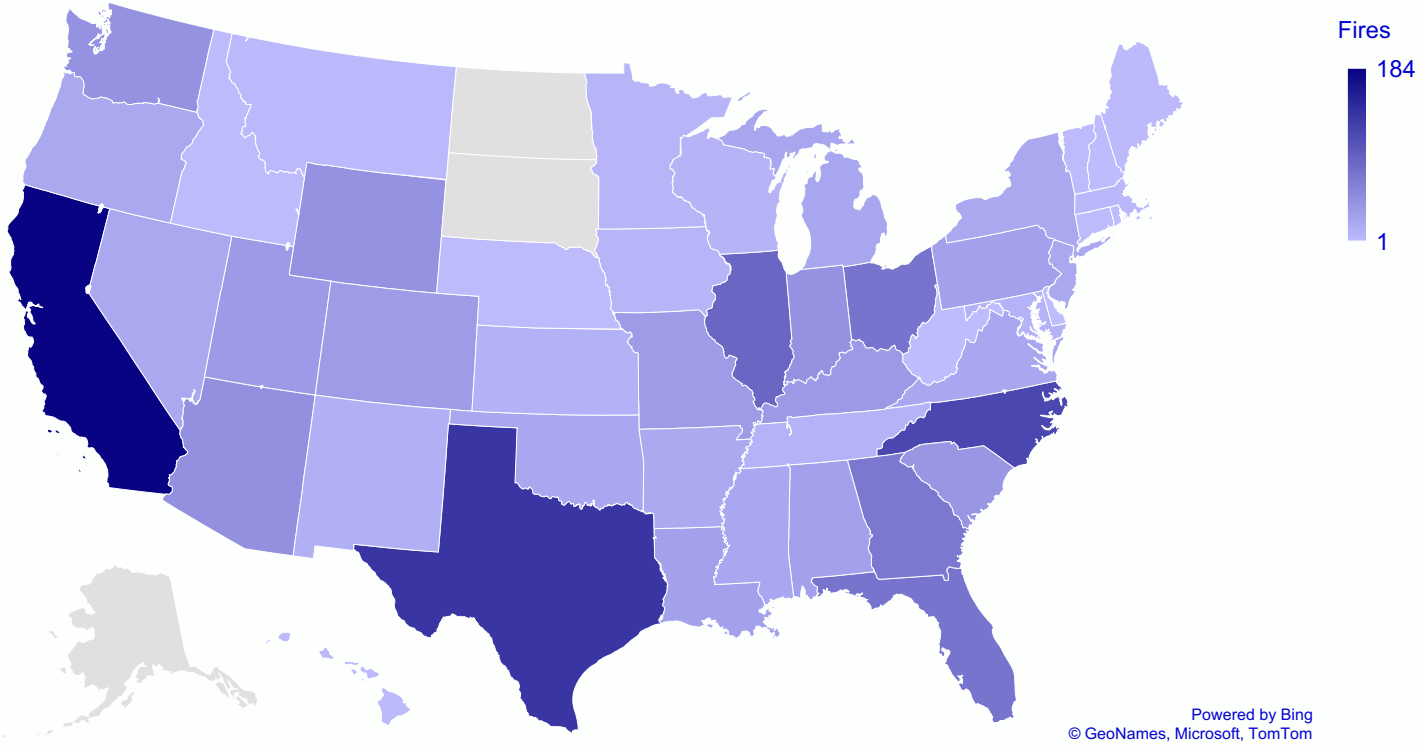
Stripes Responses by State



7-Eleven Responses by State



Circle K Responses by State



Actionable Recommendations



Awareness

About 36% of responders are primarily familiar with 7-Eleven.

Recommendation:

Consider running a Display & Video campaign comparing products and pricing to those of 7-Eleven.



Intention

About 29% of our survey responders generally purchase chips and candy from convenience stores.

Recommendation:

Run a campaign specifically advertising deals on chips and snacks as well as unique products.

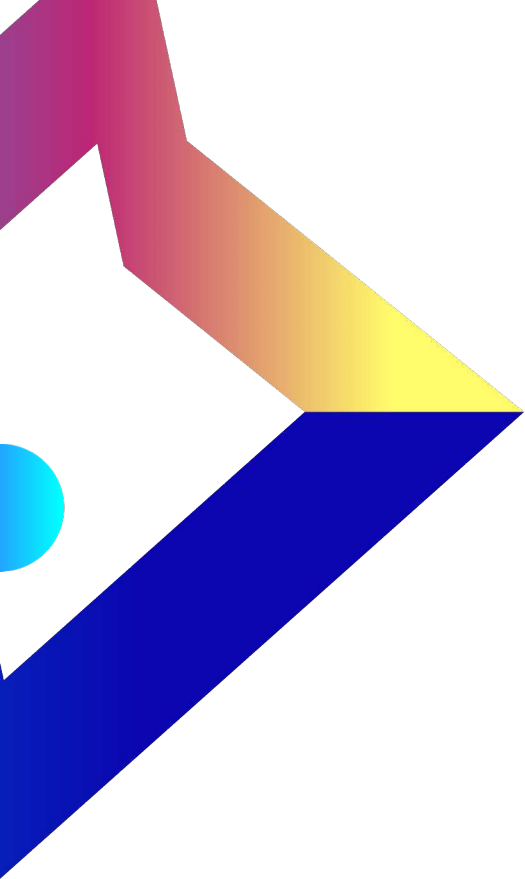


Offline +Online Connection

Most ethnic groups do not visit convenience stores for food products more than once a month.

Recommendation:

Run a campaign advertising daily and weekly use products to encourage more frequent visits to convenience store locations.



Thank You

