

Intouch – CSP

Study Insights & Customer Experience Award



OUTLOOK
LEADERSHIP



INTOUCH
INSIGHT

Industry Insights

- VS. QSR
- VS. Coffee Shops
- Fuel Purchases
- Loyalty Programs
- Last Mile Services
- Mobile Applications
- Third Party Delivery



Data Types

- Consumer Data
 - Responses from individual consumers being surveyed across the country
- Field Study Data
 - Data points captured by our field teams who are performing audits or mystery shops at locations



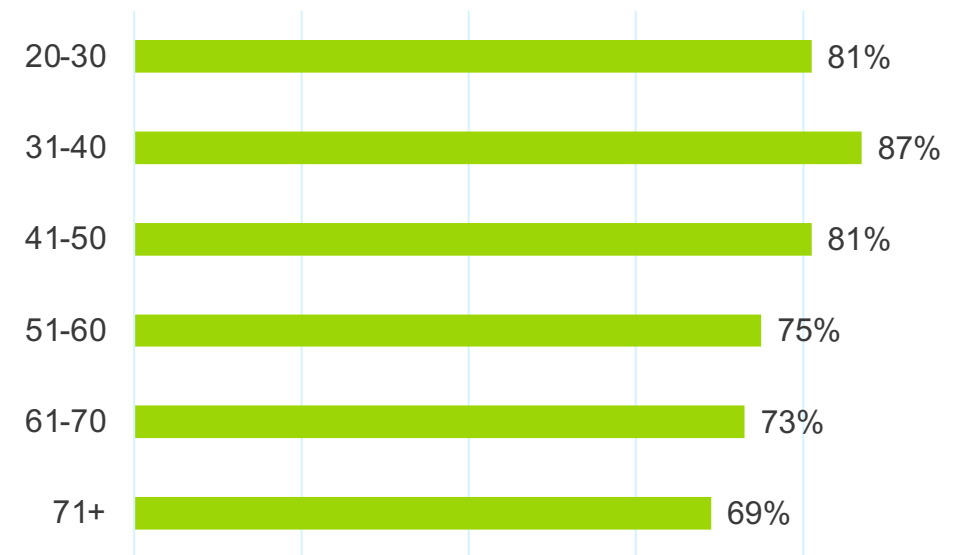
Competing with Quick Serve Restaurants



Consumers report...

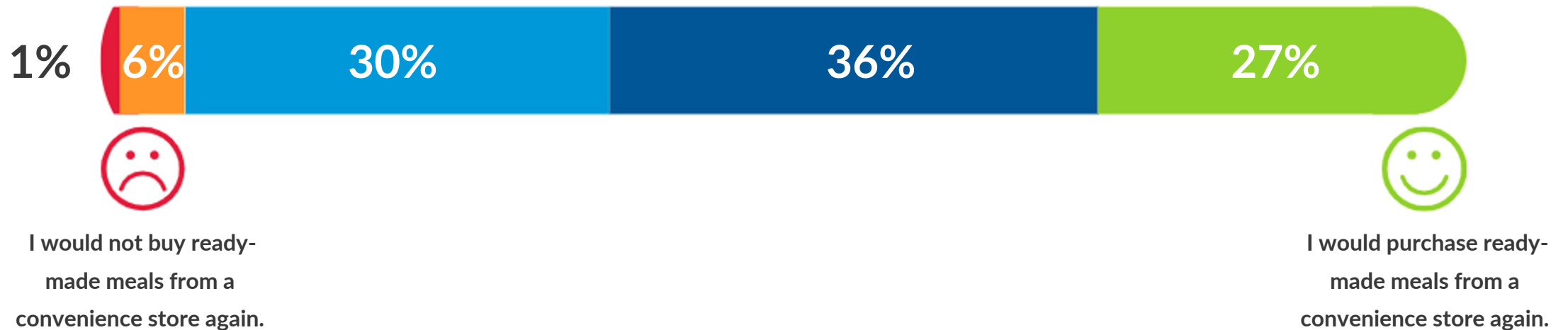
- 76% of consumers reported having purchased prepared food from a convenience store
 - Popularity highest amongst younger consumers

Percent of respondents who purchased ready-made food from a convenience store by age



Satisfaction with ready-made food

On a scale of 1-5, how would you rate the quality of the ready-made food you purchased from a convenience store?



To purchase or not to purchase?

| Why do you purchase food from a convenience stores? | Why do you not purchase food from a convenience store? |
|--|--|
| <ol style="list-style-type: none">1. Can purchase gas at the same time2. Faster than drive-thru3. Located along my commute | <ol style="list-style-type: none">1. Prefer fast-food options2. Food is too expensive3. Prefer to remain in my vehicle |

Convenience Store Scorecard

Was the sandwich cooler clean?



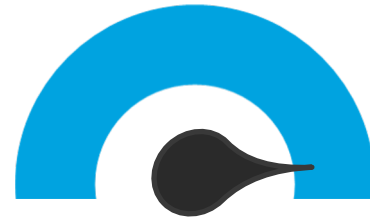
97%

Was the sandwich cooler fully stocked?



85%

Was the wait time acceptable?



95%

How would you rate the variety of products?



90%

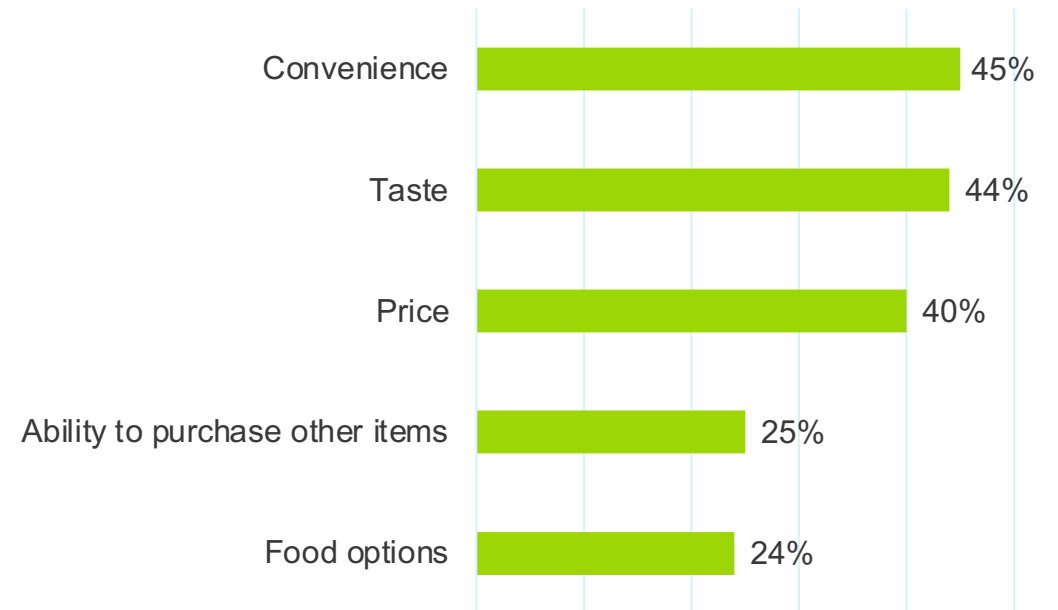
Competing with Coffee Shops



Consumers report...

- 88% of coffee drinkers surveyed reported having purchased coffee from a convenience store
- And of those who purchased, 96% said they would again

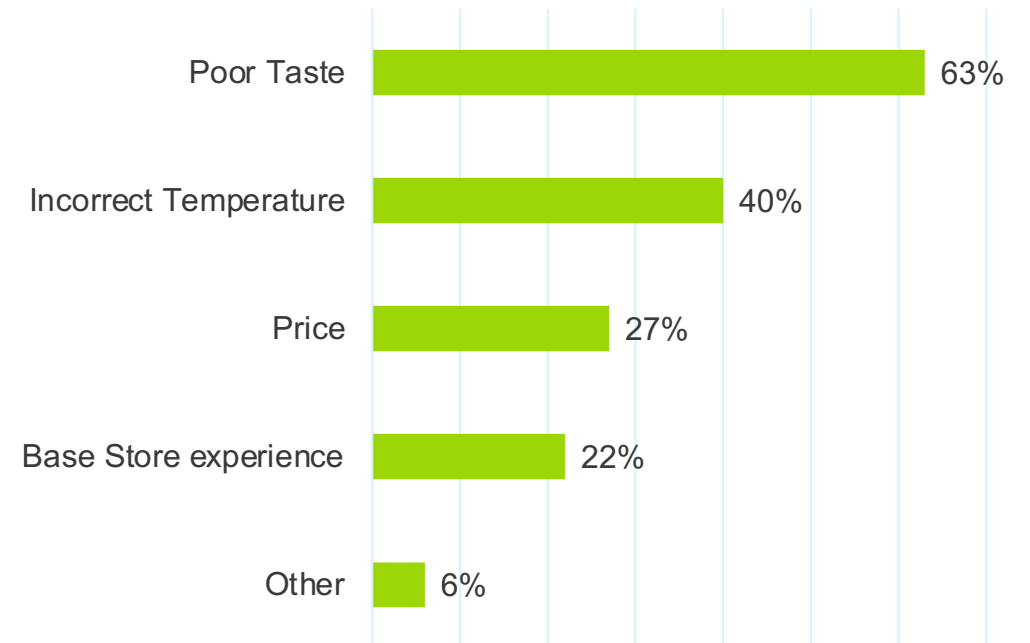
What influenced their decision on where to purchase coffee?



Why not purchase?

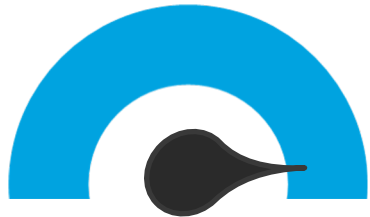
- For those who won't purchase again, **poor taste** was the #1 reason

Why they wouldn't purchase again?



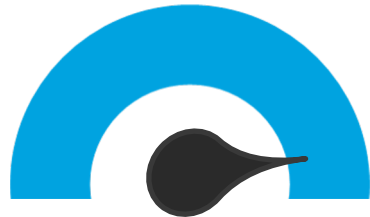
Convenience Store Scorecard

Was the coffee area clean?



94%

Was all coffee equipment operational?



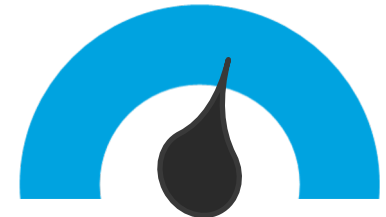
91%

Were all types of coffee displayed available for purchase?



94%

Were there milk alternatives?



55%

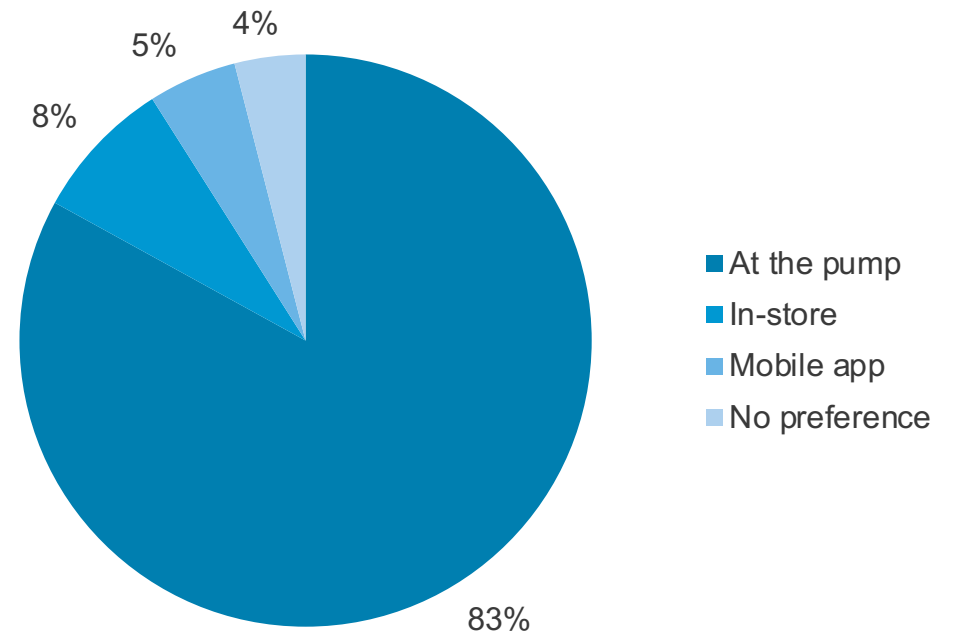
Fuel Purchases



Consumers report...

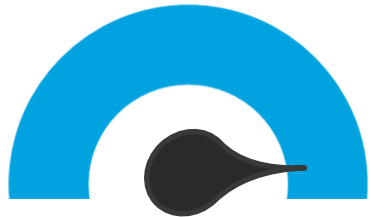
- Customers interact with the outside of the store
 - ▶ 80% of consumers surveyed report typically purchase gas from a convenience store
 - ▶ 83% of consumers prefer to pay at the pump

How did they prefer to pay for gas?



Convenience Store Scorecard

Was the pump island(s) and its pumps clean?



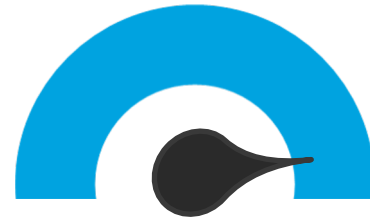
97%

Was the pump island properly supplied?



90%

Was the parking lot and store entrance free of garbage and debris?



94%

Were the front door and windows clean?



92%

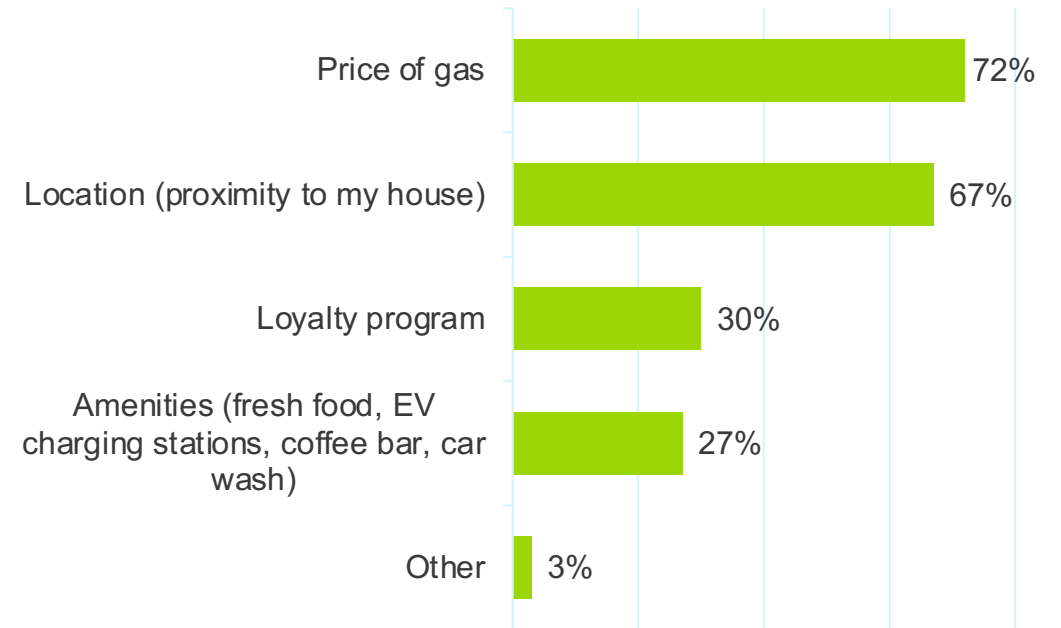
Loyalty Programs



Consumers report...

- ▶ 76% of consumers surveyed say they would choose a brand with a loyalty program over a competitor without
- ▶ 82% of consumers say they would purchase an item worth more loyalty points if both items are of equal value

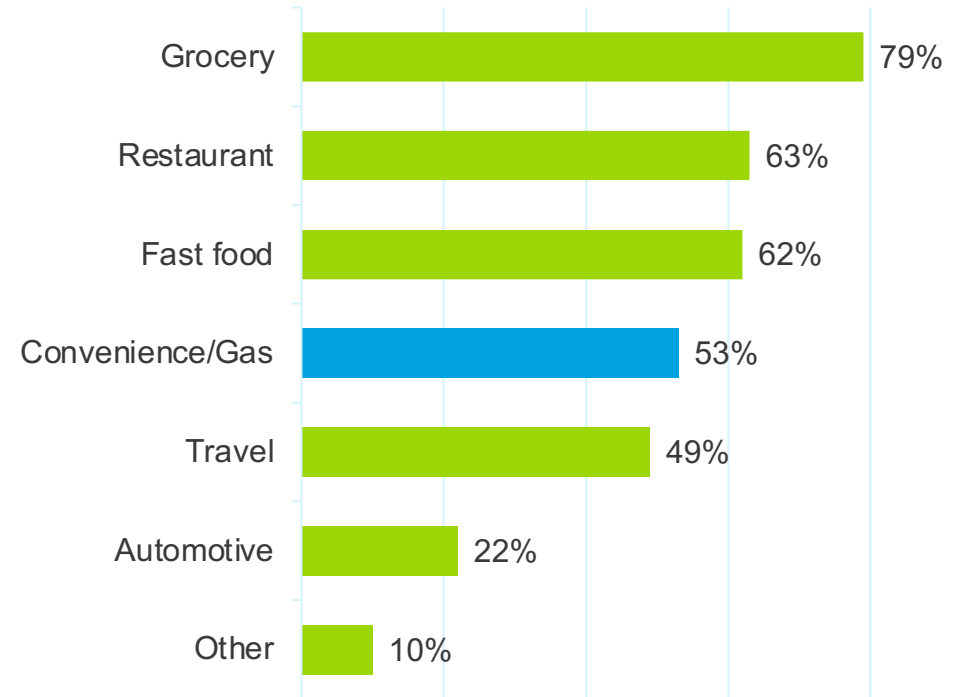
The factors that influence their decision with choosing a petro-convenience store



Consumers report...

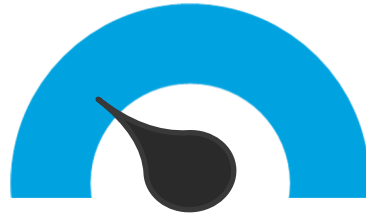
- 94% of consumers say they are part of a loyalty program
- But only 53% of those surveyed said they were part of a loyalty program at a petro-convenience store

Industries they are part of a loyalty program with



Convenience Store Scorecard

Did the cashier mention anything about the loyalty program?



28%

Did the store have any loyalty card information and/or loyalty marketing material in place?



72%

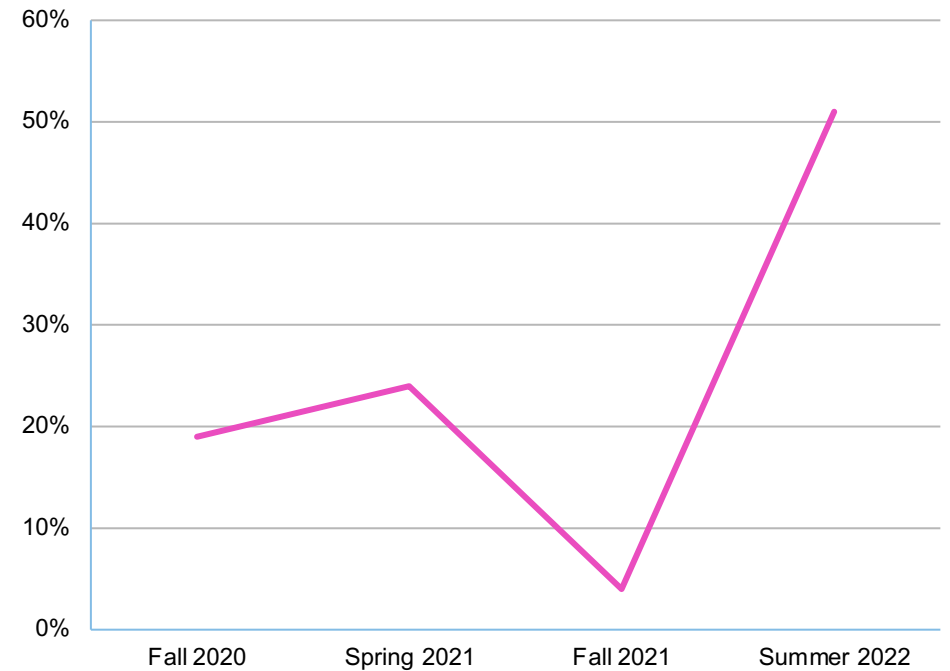
Alternative Last Mile Services



Consumers report...

- Usage of alternative last mile services has started to take-off with a **47% increase since Fall 2021**

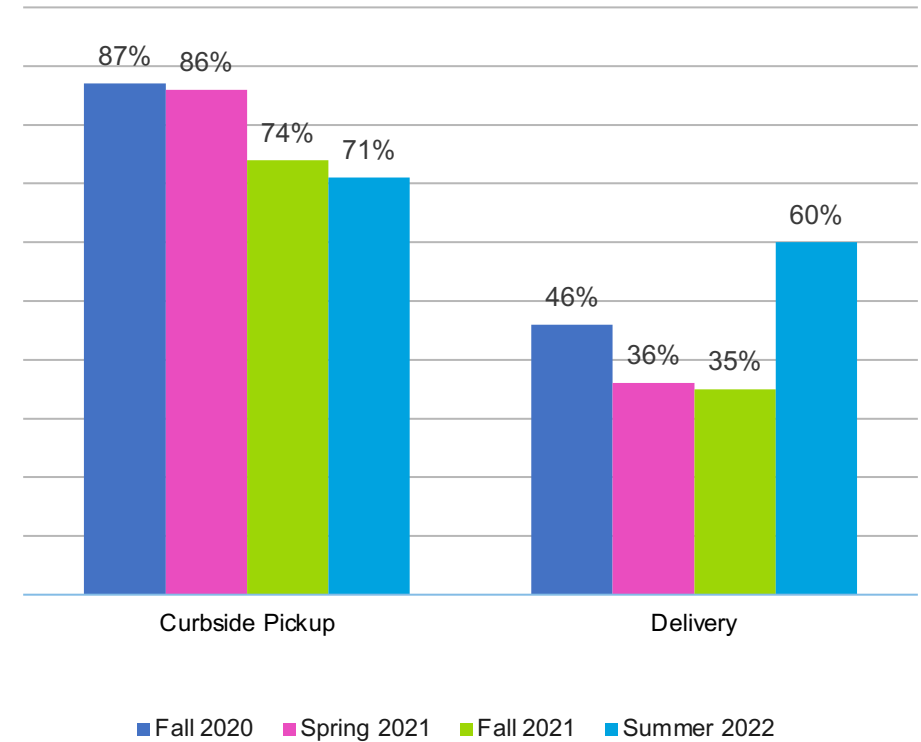
Have you used an alternative shopping method (delivery, curbside pickup, etc.) to make a purchase at a Petro-Convenience store?



Consumers report...

- Use of Delivery found the largest increase amongst those trying alternatives

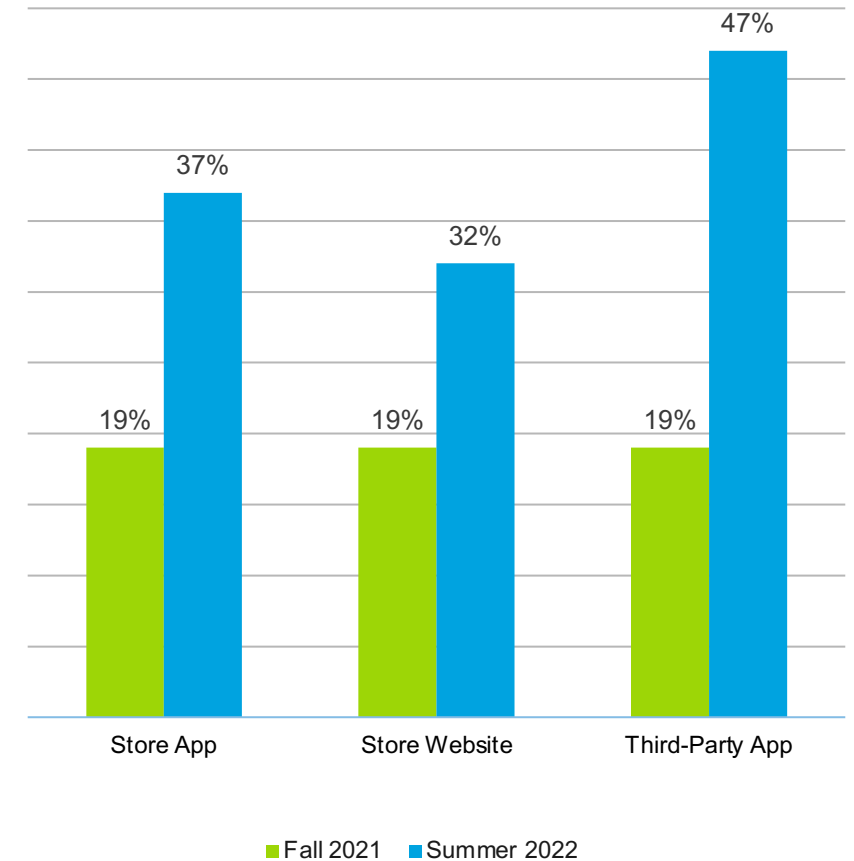
Which alternative shopping method have you used at a Petro-Convenience store?



Consumers report...

- Delivery via Third-Party App has seen the greatest surge in adoption

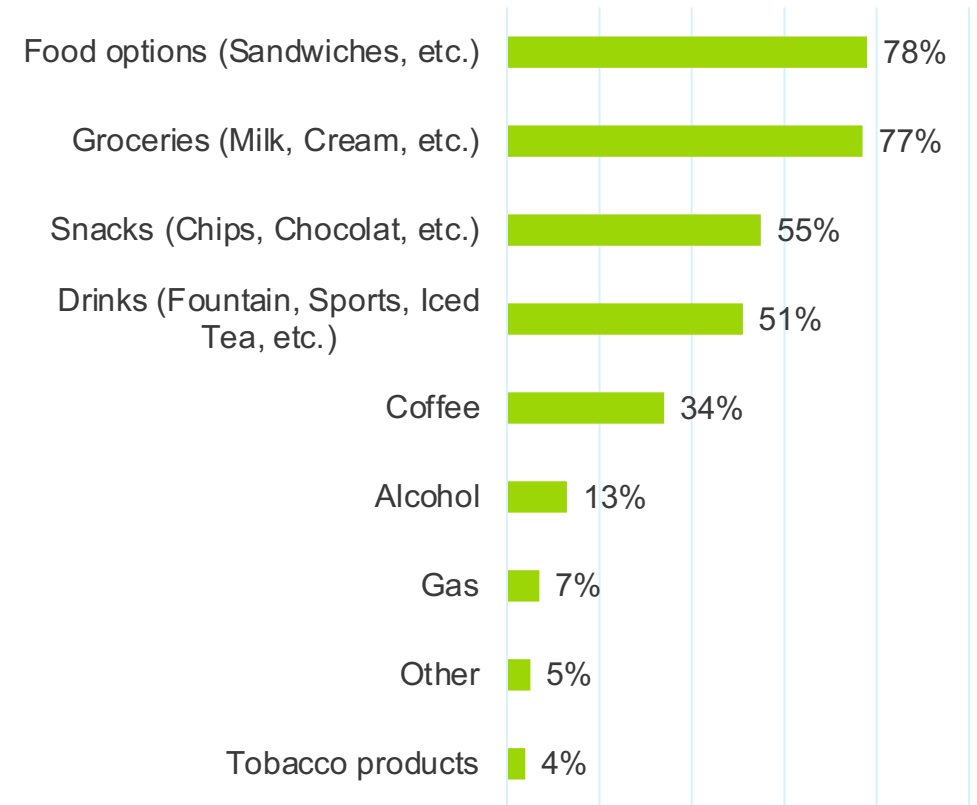
How did you make your delivery purchase?



Consumers report...

- When asked which items respondents typically purchase from Petro-Convenience stores when purchasing via alternative shopping methods, **food options**, **groceries**, and **snacks** topped the list.

What items did you purchase through mobile ordering?

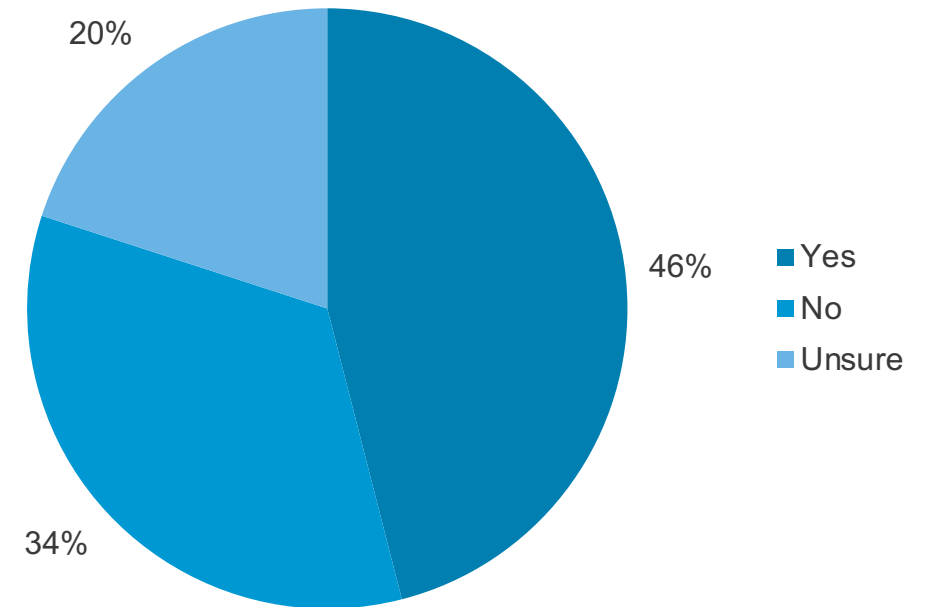


Results are based on a survey of 1514 consumers across the USA.


Consumers report...

- For those consumers who have not used an alternative last mile service, lack of interest is the number one reason.
- But overall, **46% of respondents say they would consider using in the future**

Would you use alternatives with a convenience store in the future?



Results are based on a survey of 1514 consumers across the USA.



Study Updates



Mobile Apps

We measured EASE

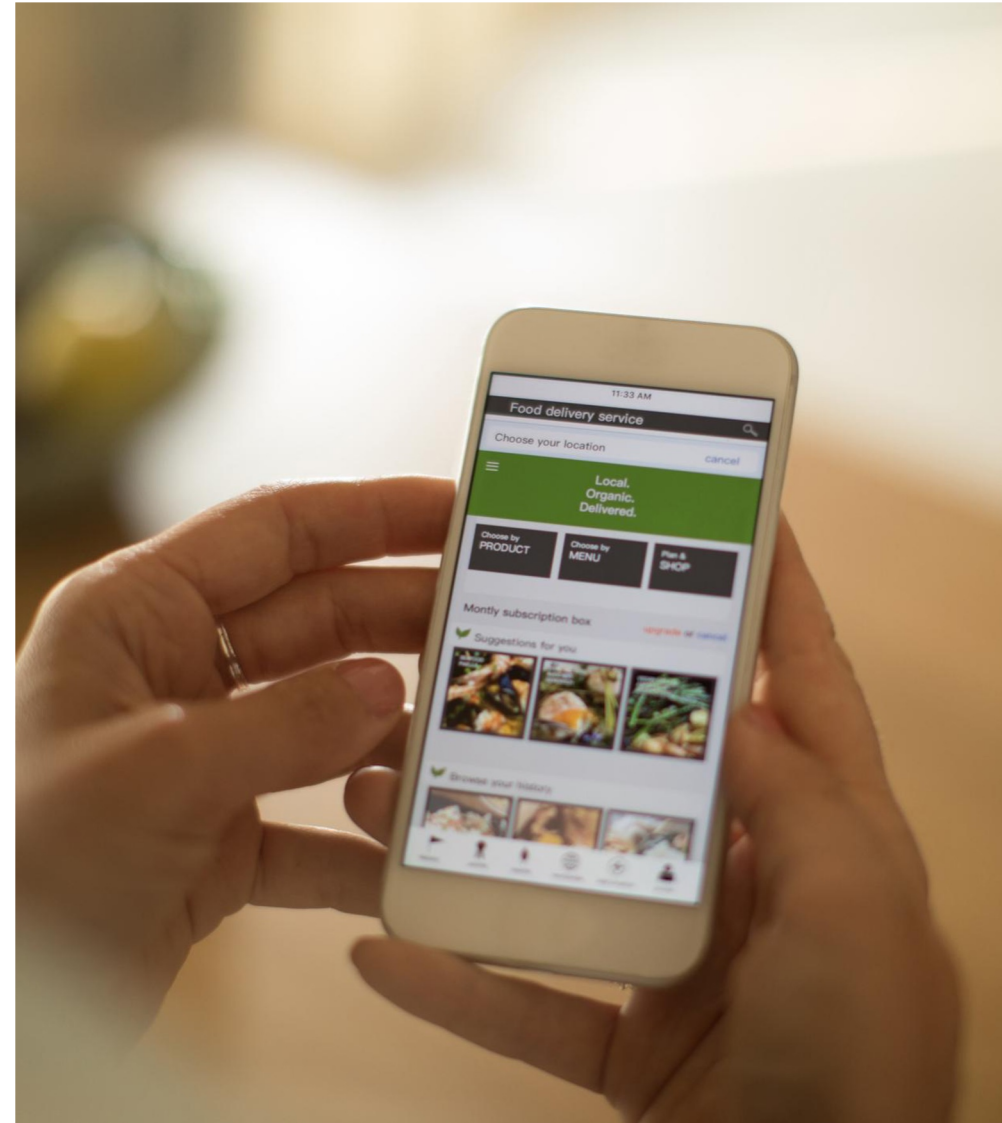
- ▶ Was it easy getting started?
- ▶ Was it easy to place your order?

We measured EXECUTION

- ▶ Was the order ready on time?
- ▶ Was the order processed correctly?

We measured EXPERIENCE

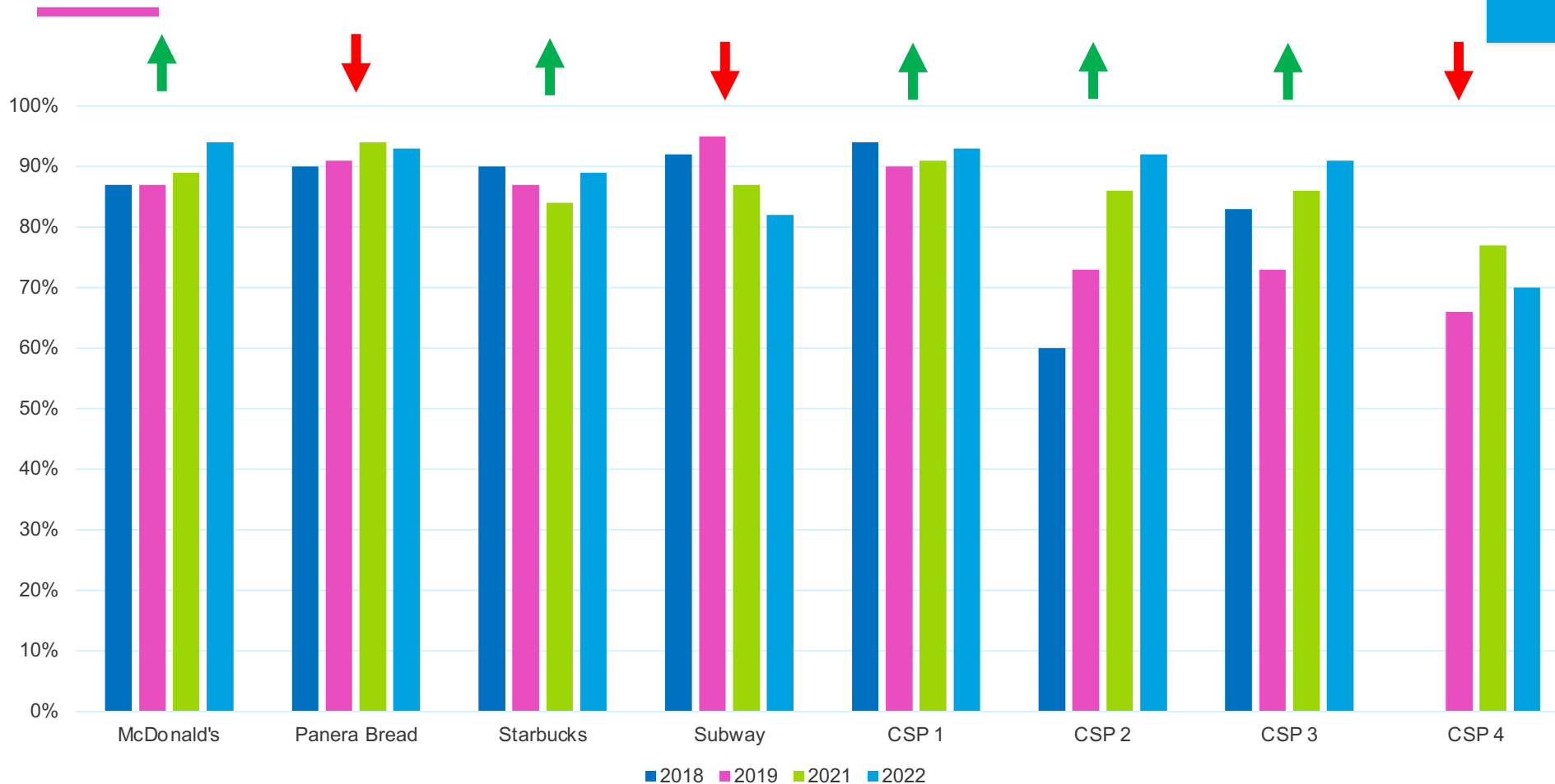
- ▶ Overall satisfaction using the app
- ▶ Likelihood to use the app again
- ▶ Net Promoter Score (NPS)



1.5%

Increase in Average
score for Convenience
Participants

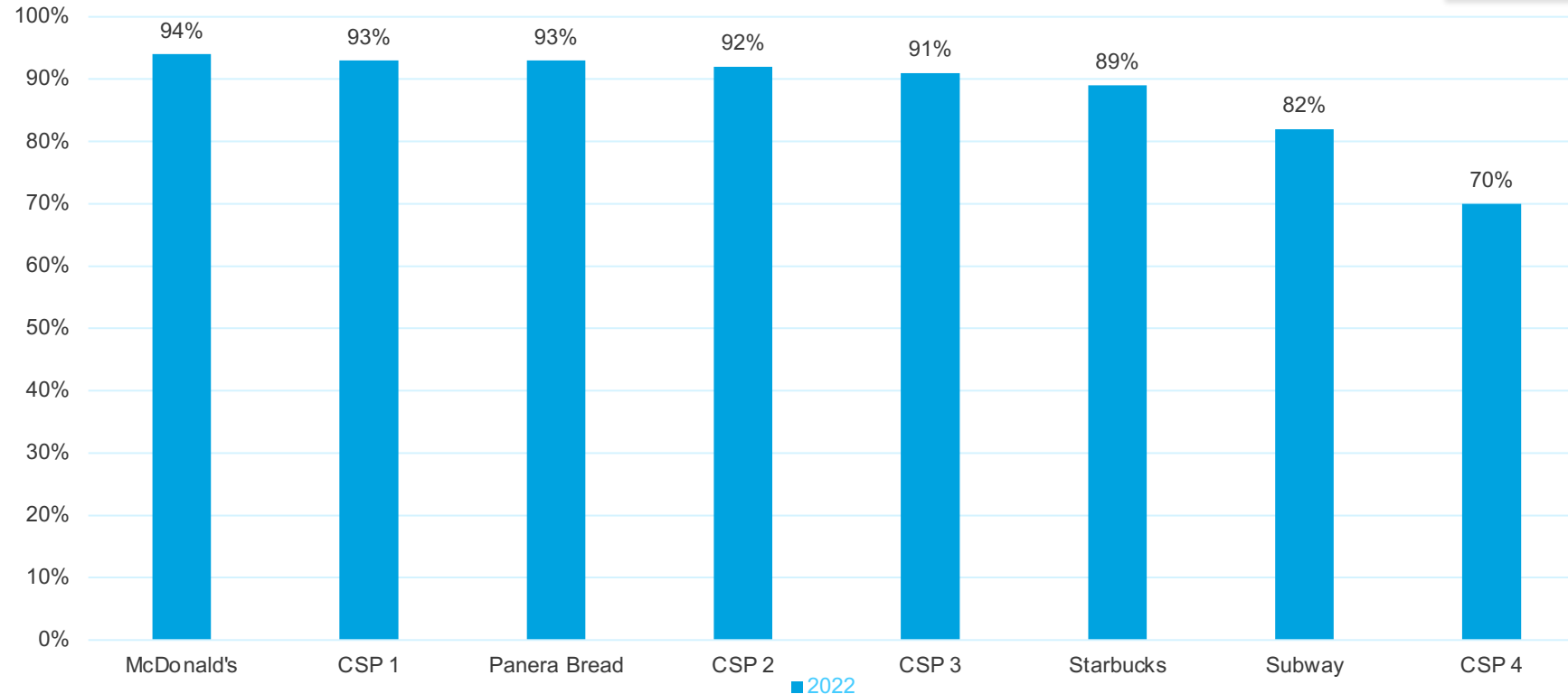
Mobile Ordering: Trend



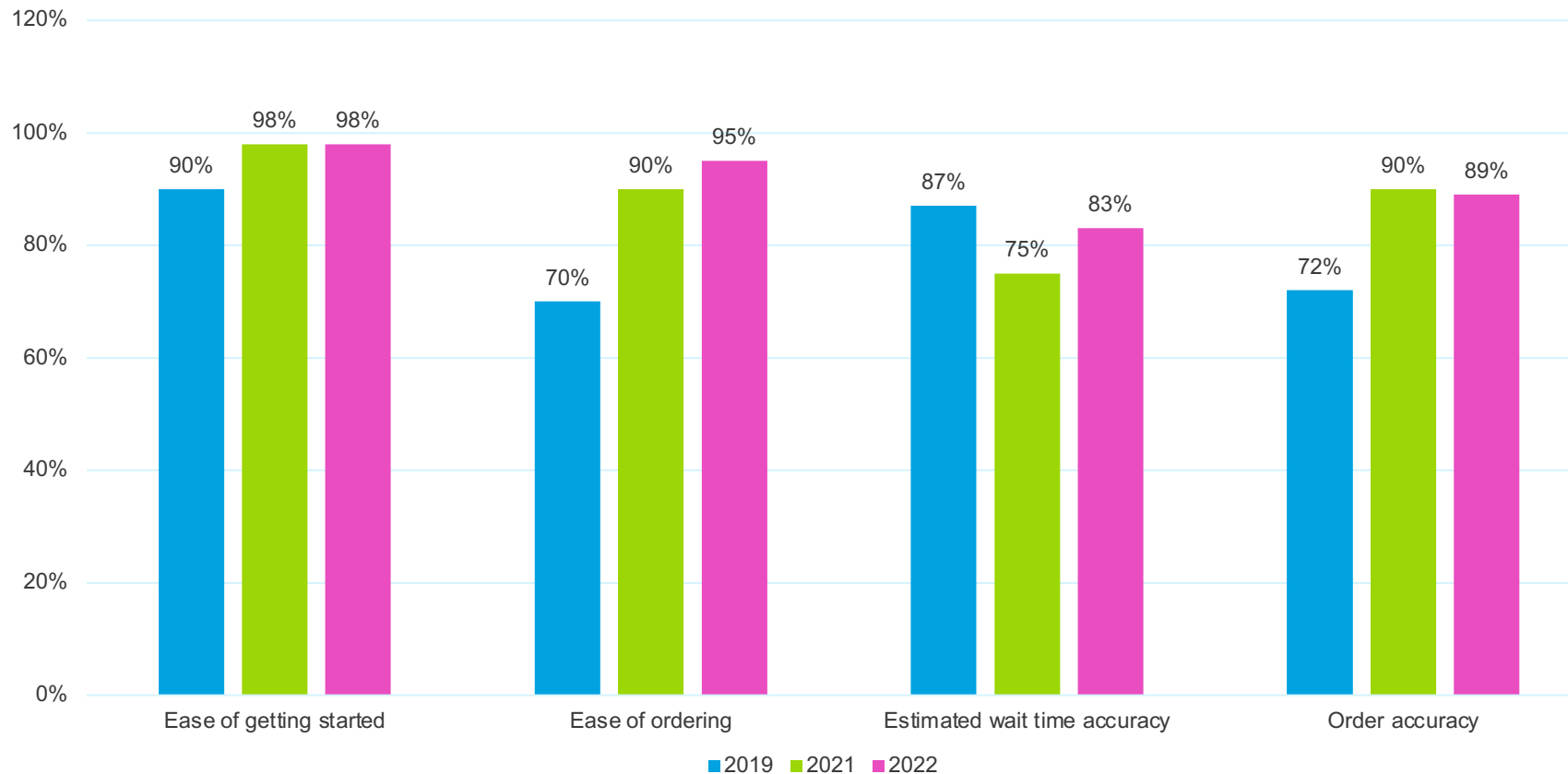
Mobile Ordering

3%

Gap between average
convenience score and
average QSR score.



2022 Continued Improvements



Mobile Ordering study data – CSP to QSR comparison

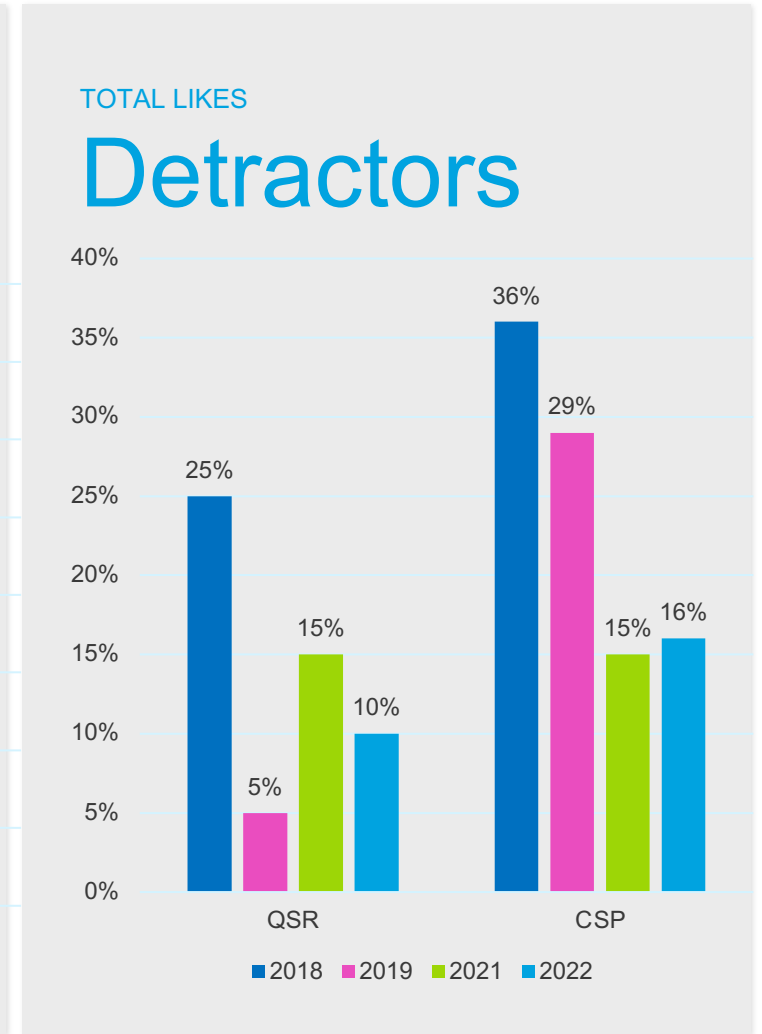
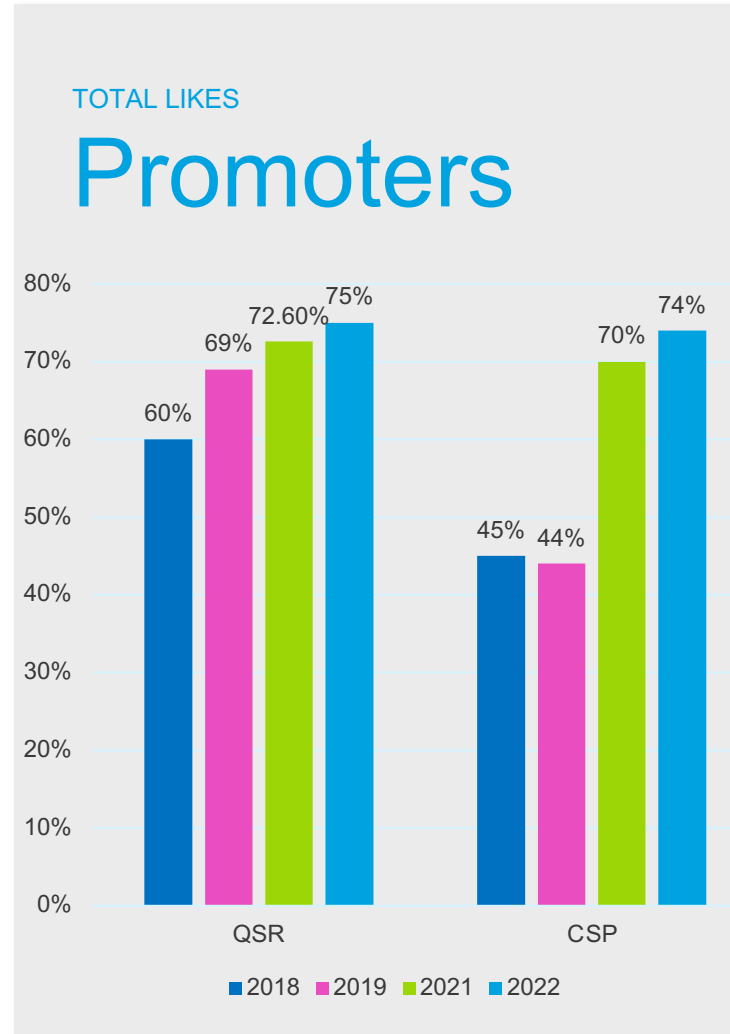


Closing the Gap

Convenience within 1% on promoters

QSR steadily increasing promoters each year

Detractors increased in Convenience



Third Party Delivery

We measured EASE

- ▶ Was it easy using the App/Website?
- ▶ Was it easy to place your order?

We measured EXECUTION

- ▶ Was the order delivered on time?
- ▶ Was the order processed correctly?
- ▶ Was the food temperature acceptable?

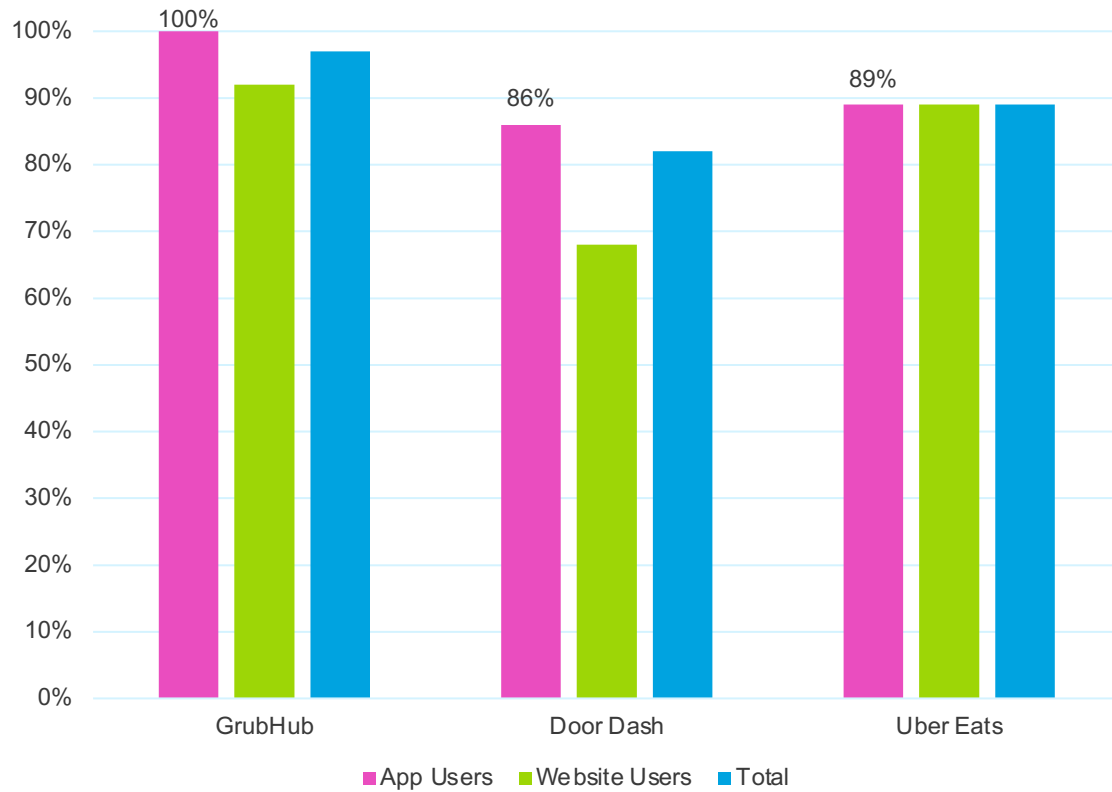
We measured EXPERIENCE

- ▶ Overall satisfaction using the service
- ▶ Likelihood to use the service again
- ▶ Net Promoter Score (“NPS”)

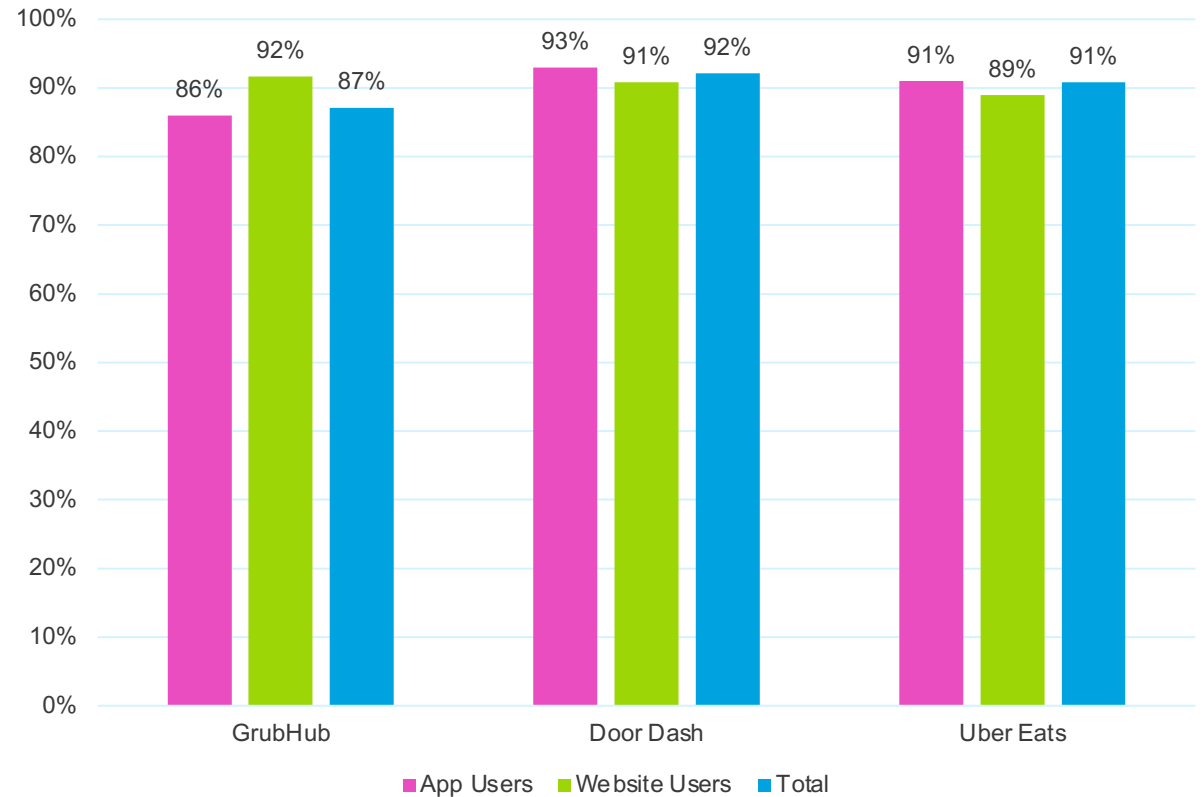


Mobile App vs. Website

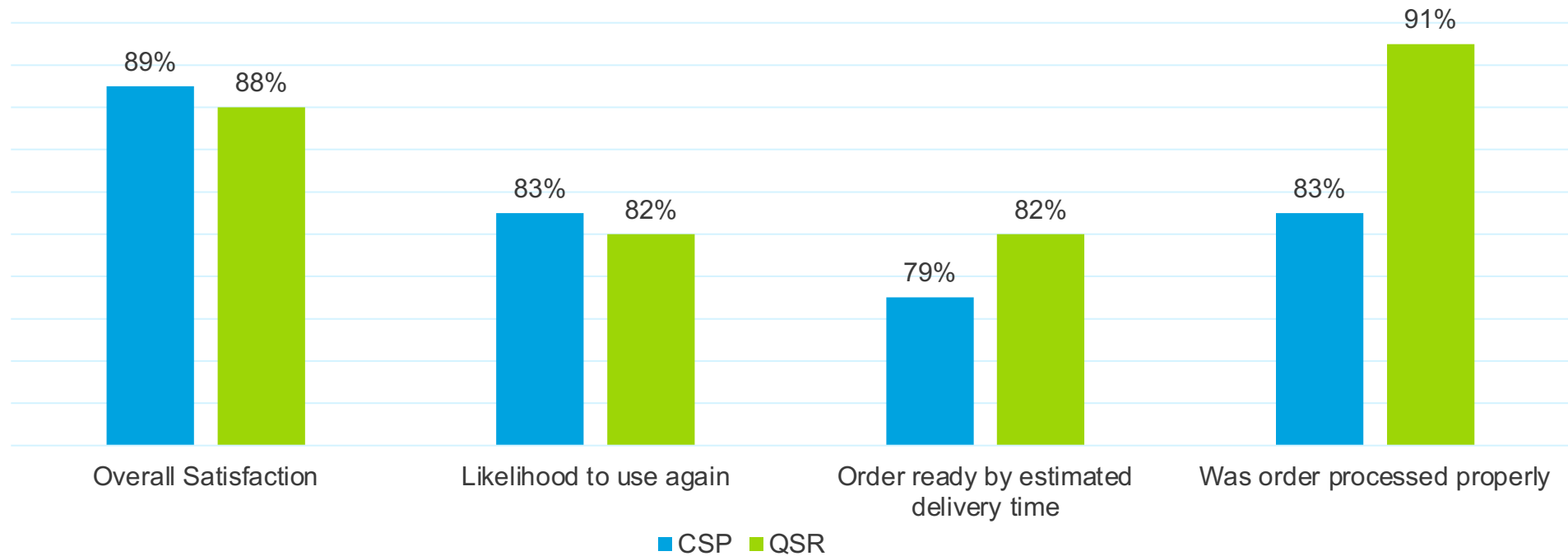
2021



2022



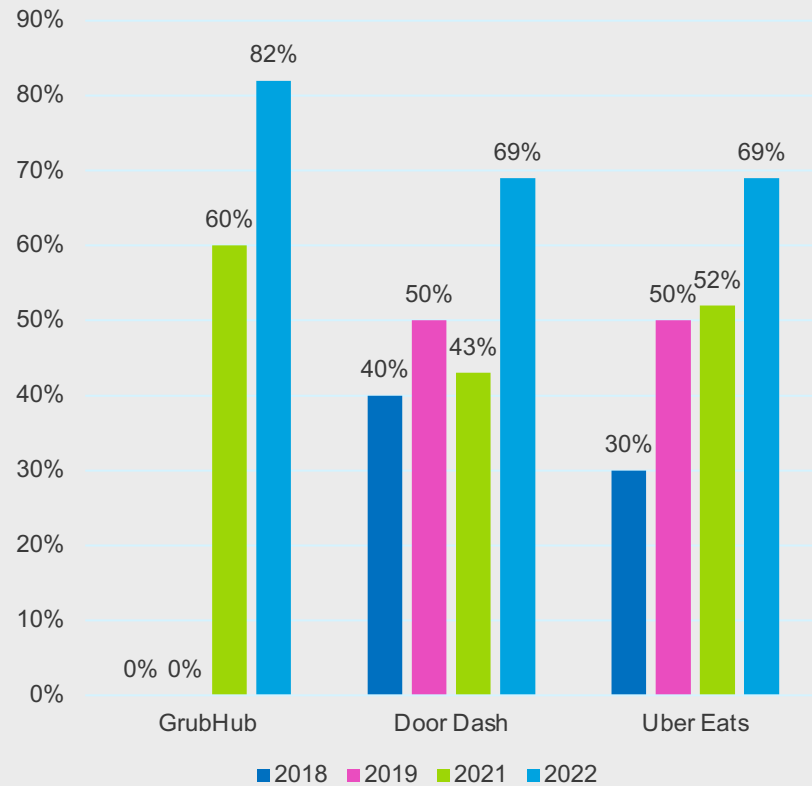
Third Party Delivery study data – CSP to QSR comparison



3rd Party

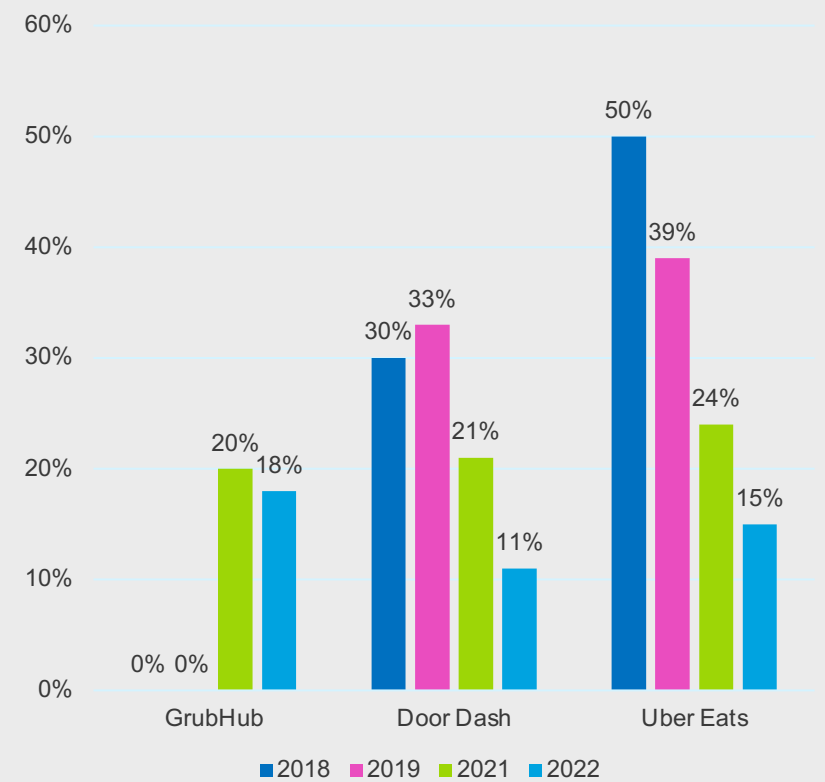
2018, 2019, 2021, 2022

Promoters



2018, 2019, 2021, 2022

Detractors



Thank You!

