THE C-STORE ALCOHOL SHOPPER

Convenience is beer's single largest platform, and growing – but the landscape is evolving. No two stores are the same, but Anheuser-Busch and its retail partners can grow by understanding key similarities between account types.

WHO

THE CURRENT C-STORE ALCOHOL SHOPPER

Young

47%

Under 35

Male

85% Male

Unmarried

45% | 52% | 51% | 47%

% Married

C-Store · Mass & Club · Grocery · Other

Diverse

56% · 22% · 17% · 6%

Index to LDA Population: 86, 146, 144, 75

Ethnicity

Caucasian · Hispanic · Afram · Other

WHERE

4 KEY C-STORE SEGMENTS*

Neighborhood

Residential area. Fuel and coffee stop for commuters and neighborhood walk-ins.

Low price/ deal sensitivity.

Urban

Higher-density area serving diverse group of mostly walk-ins. Hybrid work/residential focus.

Value shoppers seek EDLP.

Hispanic hola!

In predominantly Hispanic neighborhoods, or elsewhere but serving predominantly Hispanic clientele.

Seek deals.

Highway

Fuel-driven stop, typically serving non-local traffic passing through.

Lower need for immediate consumption.

*Several more account types exist

WHEN

TIME

49% of trips to convenience are **spontaneous**.

61% Of all trips occur in a 6-hour evening period (6pm - midnight).

Day of Week: **50%+** of trips occur between Fri-Sun

Frequency — **Alcohol Trips per Week**

All stores	2.9
Highway	3.0
Urban	5.0
Neighborhood	2.0
Hispanic	4.0

WHY

For What

#1 Relax · #2 Social · #3 Party

For Whom

72% buy for self.

Lower: Urban. Higher: Hispanic.

Why C-Store

Channel chosen for **beer selection.**

Store chosen for **proximity to home/work.**

WHAT

Pack Size Purchased

64% Singles · 12% 2-6 Packs · 24% 12+ Packs

Beer Temperature Purchased

98% of shoppers buy beer cold.

Cold · Warm

Time to Consumption

41%	1 hour
27%	1-3 hour
12%	4-8 hour
13%	Later that day
4%	The next day

68% consume within 3 hours of purchase.

HOW

Route

71% of trips begin at **work or home.**

78% of trips end at **home.**

Transportation

87% drive.

Lower: Urban. **Higher:** Highway.

Planning

~90% of all category, brand and pack choices are made pre-store.

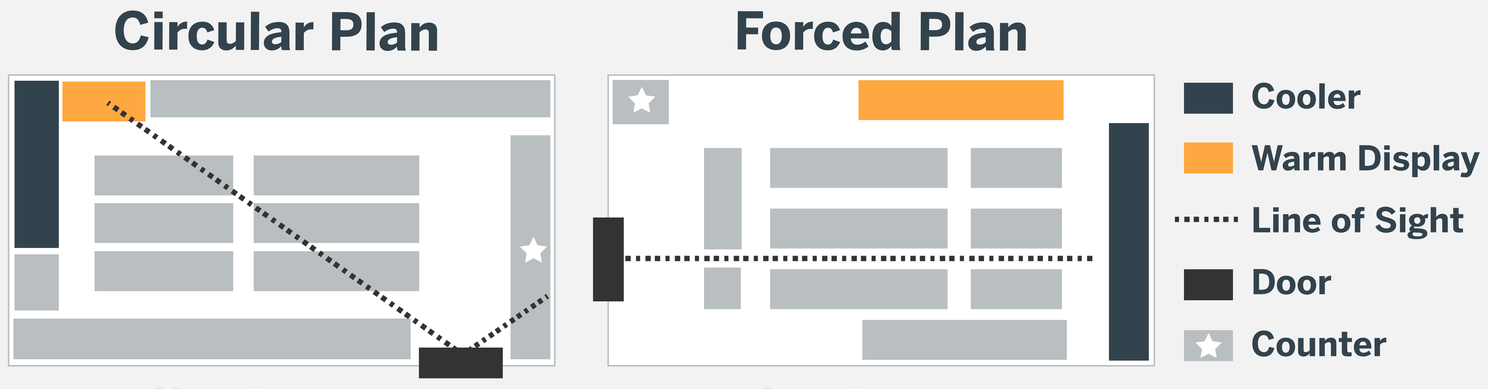
Speed: Time in Aisle

:05 Hispanic · :22 Urban · :15 Highway · :10 Neighborhood

STORE LAYOUT

FLOOR PLAN

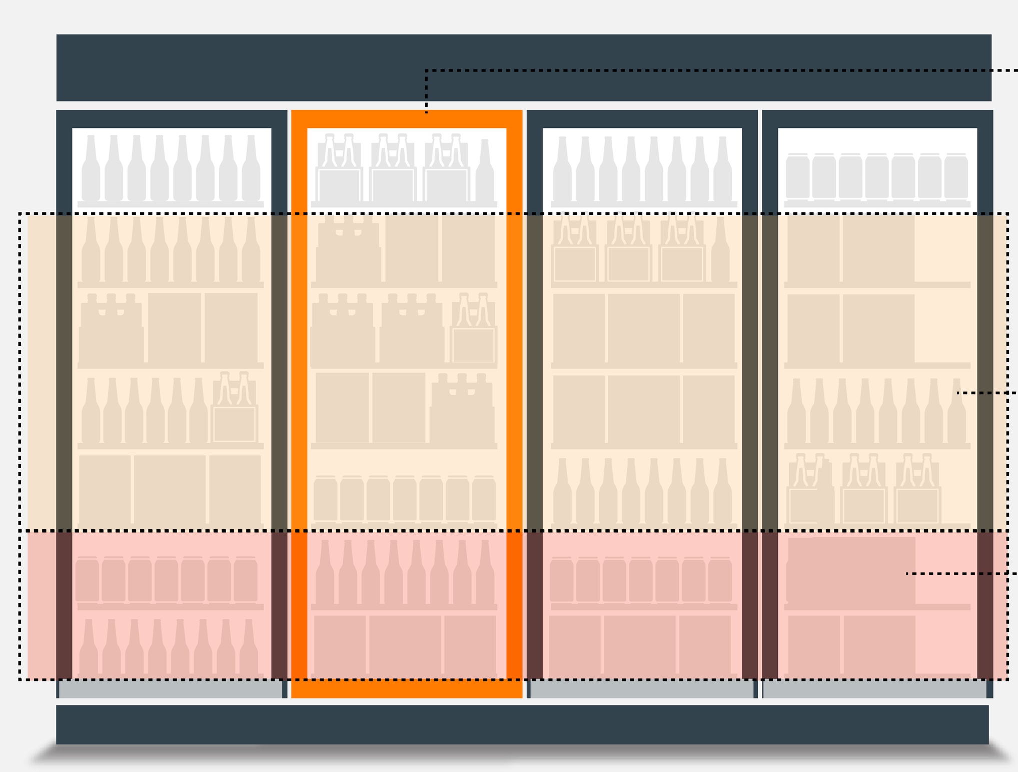
Shoppers are goal-oriented and navigate directly to cooler. Visibility of cooler upon entry, and directness of route between door, cooler and counter, affect level of browsing engagement.



Circular Plan: More Browsing, Harder Navigation

Forced Plan: Less Browsing, Easier Navigation

COOLER ENGAGEMENT



TERMINAL DOOR
Doors at end of well-traveled aisles to cooler get very high engagement.

SINGLES DOOR
Doors containing singles get very high engagement.

STRIKE ZONE
Shoppers' visual attention is usually concentrated from eyes to knee-level.

EDLP
Value shoppers seek everyday low prices, starting on the bottom shelves.

TOP/BOTTOM AREAS
Low visual attention at most account types.

MERCHANDISING

66% **RECALL NO ALCOHOL MERCHANDISING.**

The rushed, highly planned nature of trips as well as the overwhelming amount of merchandising means breakthrough is very difficult.

Communication Placement

Good: On way to cooler
Better: Cooler-adjacent
Best: On cooler shelf or door

2 for $4

Bad: Other category
Worse: Transition zone
Worst: Outside store

Buy 1, get 50% off 2nd* *with purchase of x qualifying brands and y pack sizes

Communication Principles

1-Second proposition
Large font
Colorful contrast

10-Second proposition
Smaller font
Plain colors

ANHEUSER-BUSCH INSIGHTS

2017 ABI C-Store Explore Research: syndicated data, eye tracking, in-store observation, surveys, Exit Interviews.