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Shaping Service
Key Findings

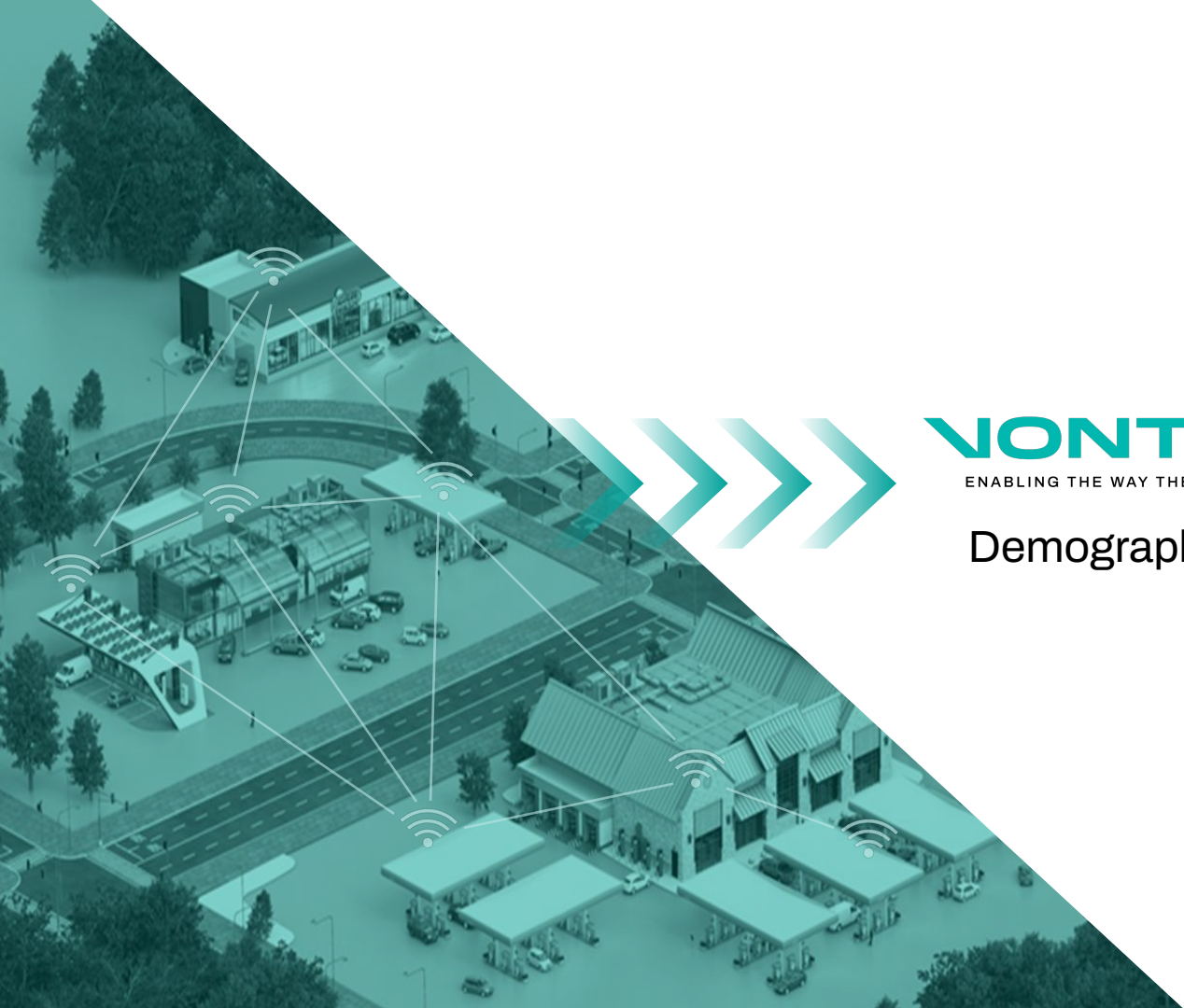Survey conducted at 95% confidence, +/- 4% margin of error
Survey conducted from August 29, 2024 - September 17, 2024

- **Respondent Qualifiers:**
    - Live in the US
    - Be 18 years of age or older
    - Be employed full- or part-time at a gas station, convenience store, car wash, or repair shop

- **615 total respondents**
    - Male: 48% | Female: 50% | Non-binary: 2%
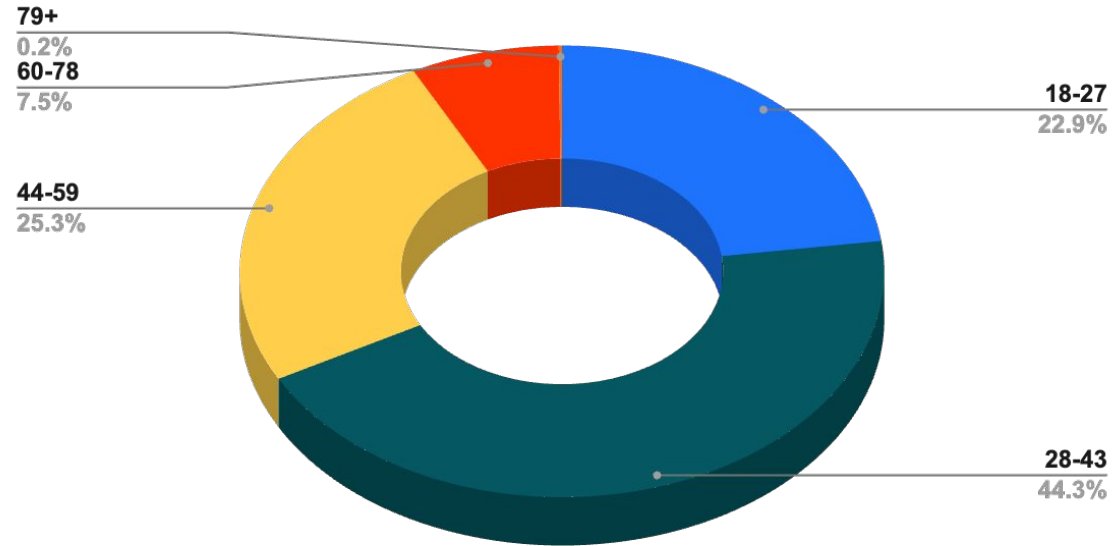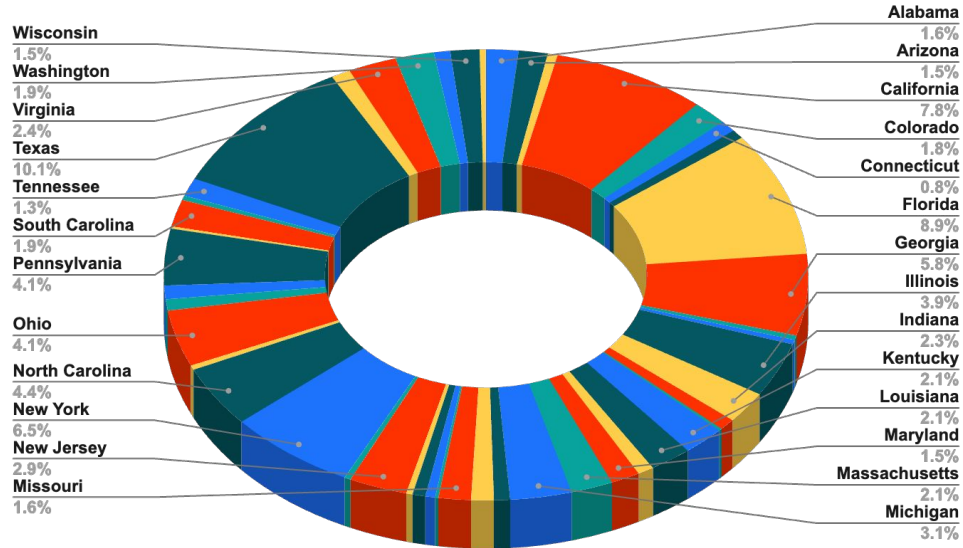   - Representation: 48 of 50 states (excluding AL & VT)

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Demographics

AGE

79+
0.2%

60-78
7.5%

44-59
25.3%

18-27
22.9%

28-43
44.3%

STATE

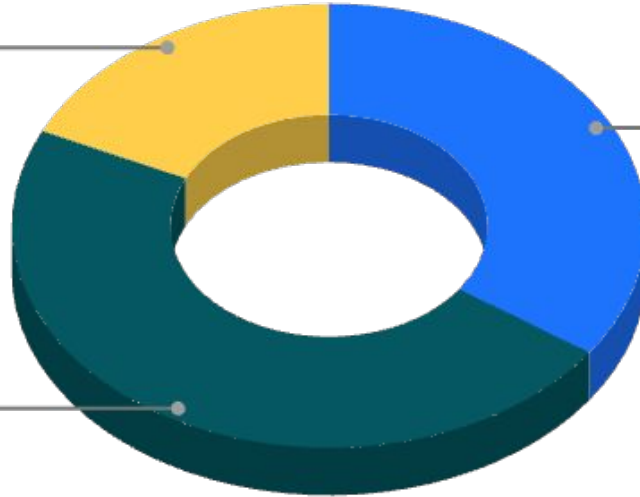| State	%
Alabama	1.6%
Arizona	1.5%
California	7.8%
Colorado	1.8%
Connecticut	0.8%
Florida	8.9%
Georgia	5.8%
Illinois	3.9%
Indiana	2.3%
Kentucky	2.1%
Louisiana	2.1%
Maryland	1.5%
Massachusetts	2.1%
Michigan	3.1%
Missouri	1.6%
New Jersey	2.9%
New York	6.5%
North Carolina	4.4%
Ohio	4.1%
Pennsylvania	4.1%
South Carolina	1.9%
Tennessee	1.3%
Texas	10.1%
Virginia	2.4%
Washington	1.9%
Wisconsin	1.5%

LOCALE

Rural
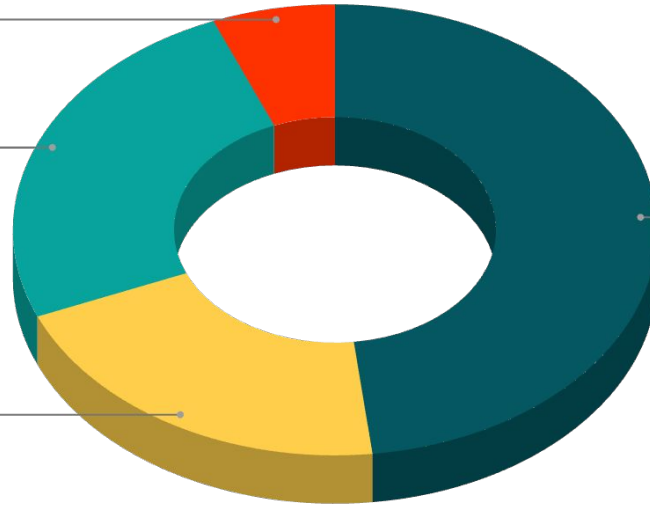18.0%

Urban
34.7%

Suburban
47.3%

JOB TITLE
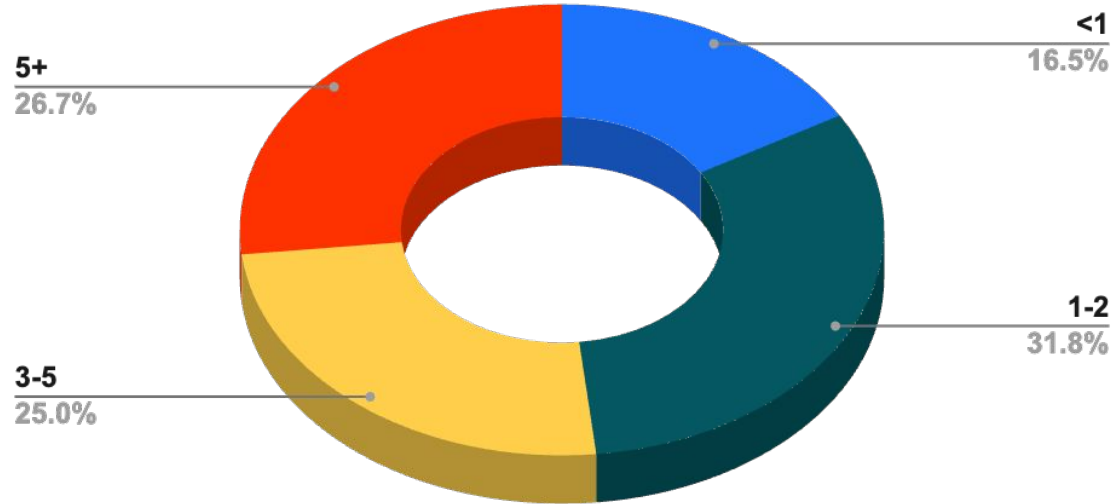

Owner/Executive
6.2%

Manager
25.1%

Supervisor/Team Lead
20.6%

Individual contributor
48.1%

YEARS EMPLOYED

BUSINESS TYPE

Car wash
16.0%

Repair shop
17.7%

Convenience store
42.9%

Gas station
23.3%

NUMBER OF LOCATIONS

Unsure
12.2%

10,001+
2.6%

5,001-10,000
2.4%

1,001-5,000
5.2%

501-1,000
7.3%

201-500
10.0%

51-200
17.8%

1-10
28.7%

11-50
13.8%
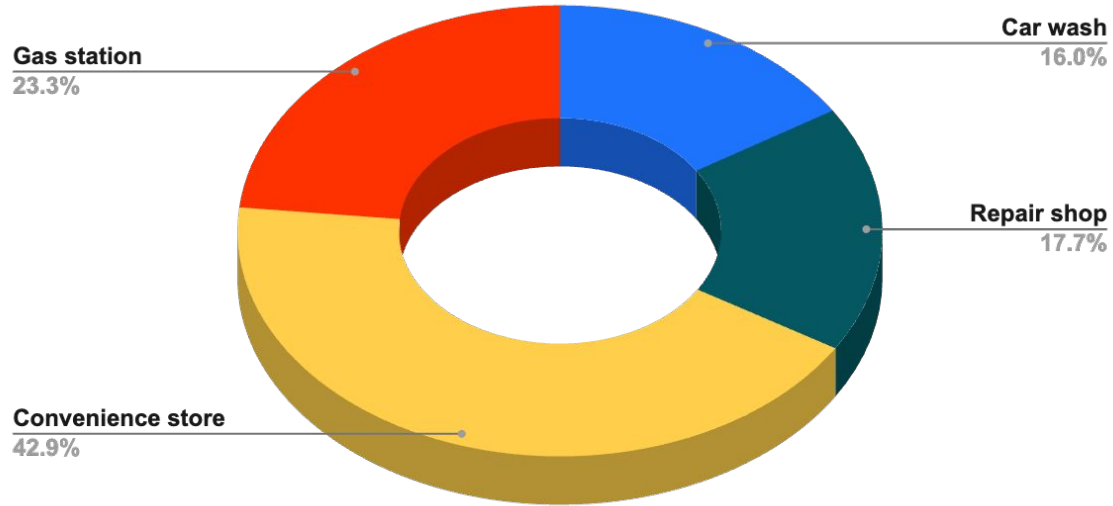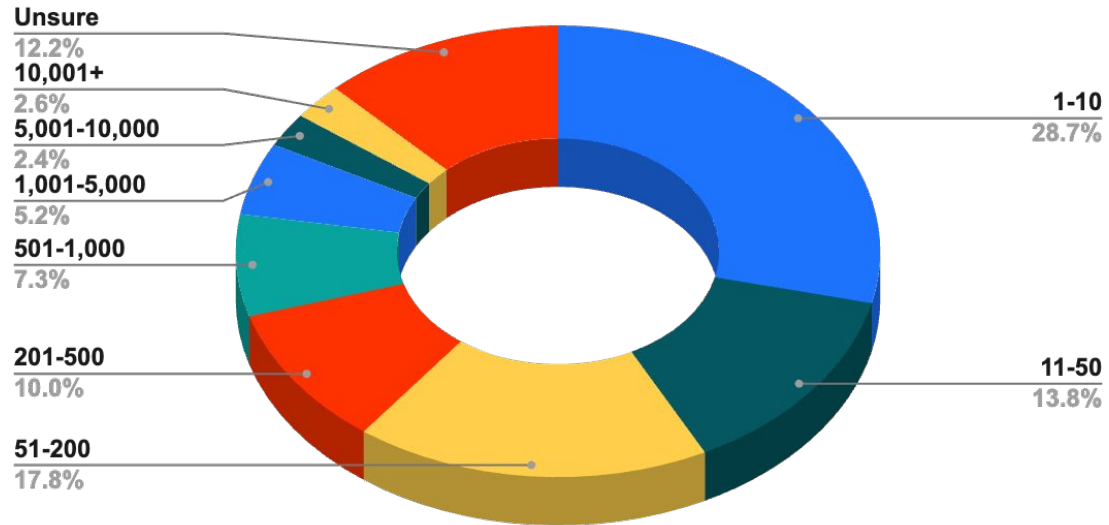
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Key Findings

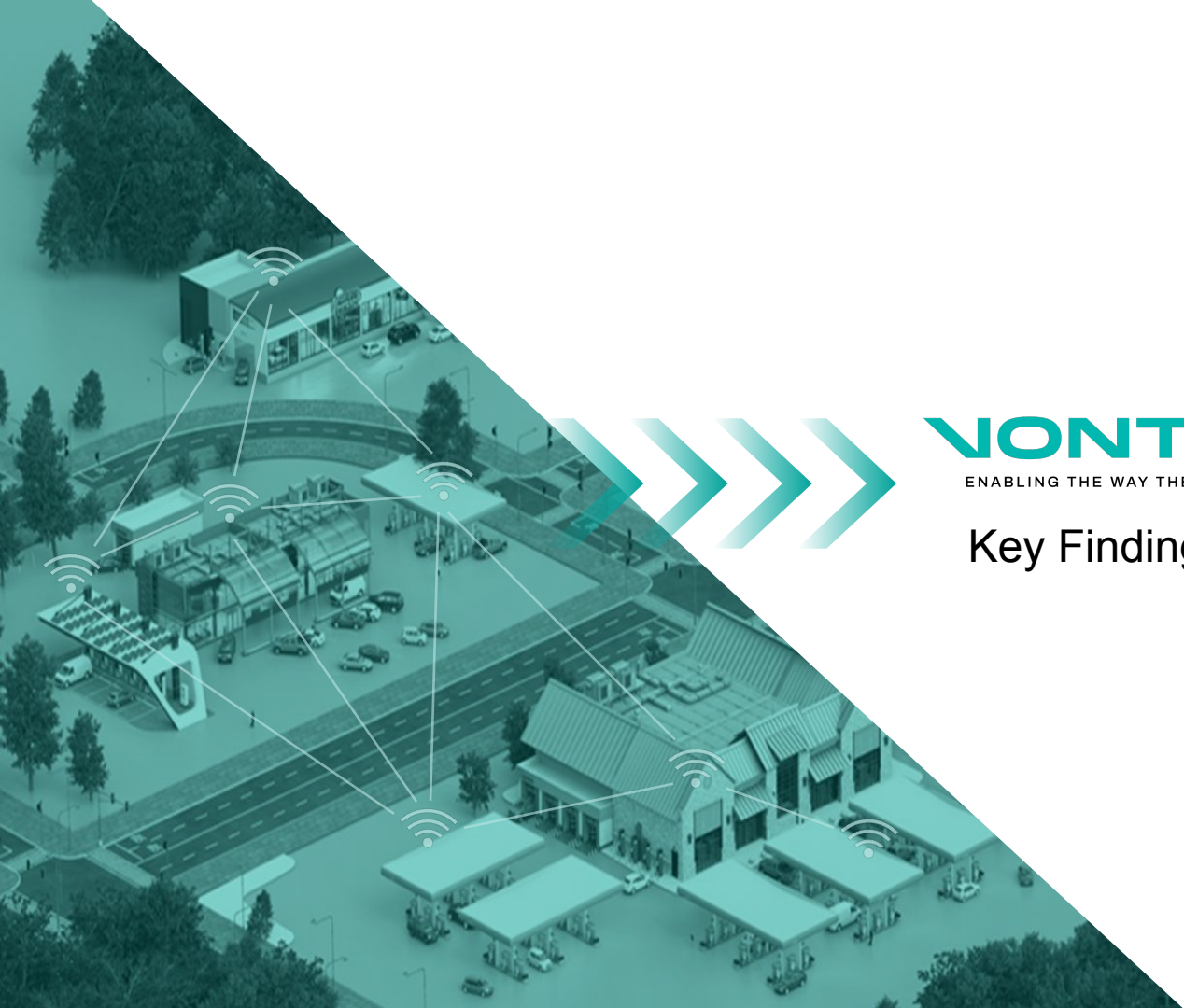# FOR C-STORES, GAS STATIONS, CAR WASHES, AND REPAIR SHOPS, THE CUSTOMERS ARE THE CENTER OF THE UNIVERSE

86%

Believe that customer feedback is crucial to improving business operations

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BUT FEEDBACK IS ONLY USEFUL
IF IT'S COMMUNICATED

51%

Say that customer feedback is not effectively communicated upward, and ICs were **17% more likely** than those at the Supervisor level and above to say this

While 44%

Say it's not effectively communicated across shifts, and those with 5,000+ locations were **43% more likely** than average to say this

And 41%

Say it's not effectively communicated between workers

AND OLD SCHOOL METHODS
MEAN VALUABLE INSIGHTS GET LOST IN TRANSLATION

59%

Gather feedback through in-person interactions, and those working at repair shops were **17% more likely** than average to say this

7 in 10

Believe that valuable customer feedback is often missed because it was given in a one-off conversation

LEAVING A SIGNIFICANT NUMBER
OF BUSINESSES IN THE DARK WHEN IT COMES TO CUSTOMER NEEDS

36%

Say that their company doesn't fully understand the needs of their customers – in fact, **21%** say that feedback is **rarely (17%)** or **never (4%)** implemented. Those with 5,000+ locations were **89% more likely** than average to say that feedback is rarely implemented

MANY STORES HAVE ACCESS
TO CUSTOMER DATA – BUT ONLY A FRACTION ARE USING IT

71%

Have a customer loyalty program, however, those working at repair shops were **20% less likely** than average to say this

6 in 10

Believe that valuable customer feedback is often missed because it was given in a one-off conversation

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THIS UNUSED
CUSTOMER DATA

61%

Report significant gaps in how data on customer preferences is used at their company, and those with 5,000+ locations were **18% more likely** than average to say this

IS A MASSIVE MISSED OPPORTUNITY
FOR THESE BUSINESSES

83%

Feel that better data insights could significantly increase **customer loyalty**

85%

Feel that better data insights could significantly increase **customer spending**

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THESE BUSINESSES ARE A PILLAR
OF THE COMMUNITIES THEY SERVE

82%

Have a recognizable, consistent customer base, and of those, **95%** say their relationships with this group greatly impact customer experience

BUT MANY ARE MISSING THE
OPPORTUNITY TO TAP INTO COMMUNITY NEEDS

39%

Say their business is not fully adapted to the local community's needs, and ICs were **29% more likely** than those at the supervisor level and above to say this

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AND NOT CAPITALIZING ON
COMMUNITY ENGAGEMENT AS A BUSINESS TACTIC

89%

Agree that more localized customer recognition and engagement could improve their community's perception of their business

85%

Feel that community engagement initiatives would positively impact business, however **32%** report that their company doesn't prioritize giving back to their local community (those in the South were **62% more likely** than those in the Northeast to say this)

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HOW ARE THESE BUSINESSES

USING TECH? ACCORDING TO OUR PANEL:

Payments

76% use technology in this way

Ordering

62% use technology in this way

Restaurants

56% use technology in this way, and those with 500+ locations were **<u>29% more likely</u>** than those with 50 or fewer locations to say this. However, those working at car washes were **<u>27% less likely</u>** than average to say this

ANOTHER BENEFIT OF TECH?

SOLVING ONE OF THE MOST PROMINENT ISSUES BUSINESSES FACE TODAY

47%

Are currently facing staffing shortages, and those with 500+ locations were **19% more likely** than average to say this

And 82%

Of those facing shortages agree that investing in new tech could help alleviate the burden on workers in understaffed stores, and those in urban areas were **13% more likely** than average to say this

AND OFFERING A SOLUTION
TO HIGH TURNOVER RATES

36%

Of those facing shortages say this is due to increased turnover

And 42%

Are exploring technology as a way to address high turnover rates, and those working at car washes were **40% more likely** than average to say this

BUT HAVING TECH ISN'T ENOUGH –
IN ORDER TO MAKE TECH EFFECTIVE…

53%

Believe that technology would boost their **efficiency** and/or **productivity**. Those working at gas stations were **<u>15% more likely</u>** than average to say it would boost efficiency

…BUSINESSES MUST CONQUER
THESE COMMON TECH HURDLES

43%

Say that their company's tech is difficult to maintain, and those with 5,000+ locations were **26% more likely** than average to say this

54%

Say that tech adoption at their workplace is slow

51%

Say that tech adoption at their workplace is inconsistent, and those with 5,000+ locations were **31% more likely** than average to say this

AND PROPERLY TRAIN THEIR
EMPLOYEES ON HOW TO USE NEW TECH

Nearly ¼

(24%) say that when their company implements new tech, they're not adequately trained on how to use it

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INEFFICIENT TECH USE
CAN LEAD TO DECREASED CUSTOMER SATISFACTION

53%

Say that the complexity of current systems is a barrier to better customer service

41%

Say that their company's technologies don't work together

And of those, 48%

Say this leads to poor customer experience – ICs were **18% more likely** than those at the supervisor level and above to say this while those in Gen Z were **12% more likely** than average to say this

AND CREATE

UNSAFE WORK ENVIRONMENTS

43%

Have felt unsafe due to **outdated** technology

37%

Have felt unsafe due to **insufficient** technology

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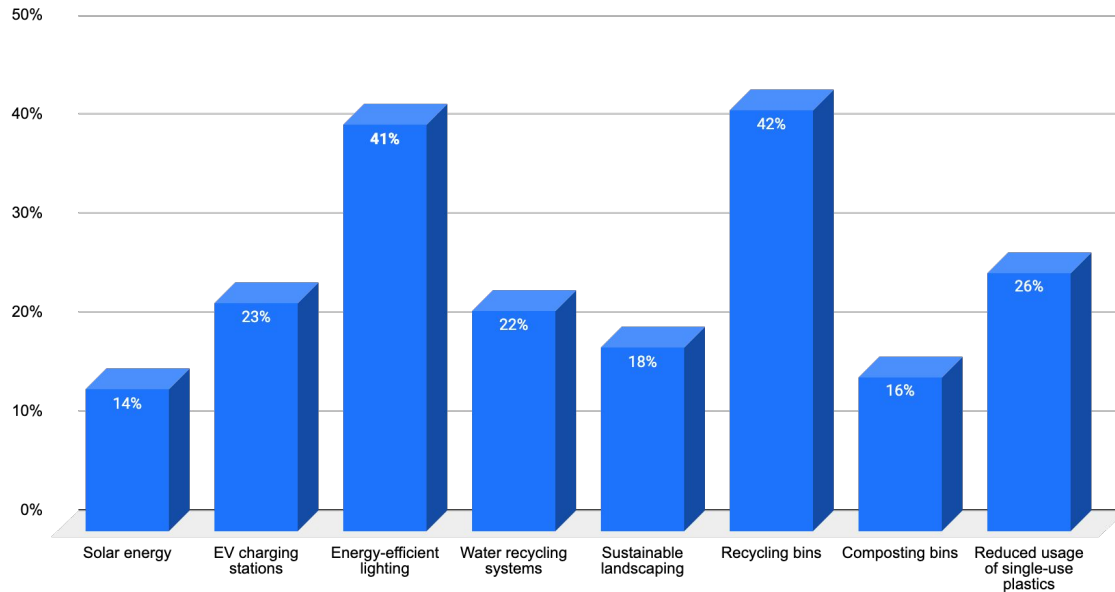
LEAVING WORKERS FEELING
BEHIND THE CURVE

47%

Feel that their company is not keeping up with industry tech advancements

49%

Feel that their company doesn't invest enough in technology

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MANY BUSINESSES ARE
STRIVING FOR SUSTAINABILITY

Which of the following sustainability initiatives, if any, has your business implemented? Select all that apply.

Bar chart:
- Solar energy: 14%
- EV charging stations: 23%
- Energy-efficient lighting: 41%
- Water recycling systems: 22%
- Sustainable landscaping: 18%
- Recycling bins: 42%
- Composting bins: 16%
- Reduced usage of single-use plastics: 26%

Those in the Western US were **50% more likely** than average to have implemented solar energy

Those in the Northeast were **31% more likely** than average to have reduced single-use plastics

Those with 500+ locations were **30% more likely** than average to have EV charging stations

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AND EMPLOYEES ARE REAPING
THE BENEFITS

73%

Of those whose companies have implemented sustainability initiatives say it makes their work feel more meaningful

And 67%

Say it creates opportunities for them to move up in their company, and those working at car washes were **24% more likely** than average to say this

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Thank you

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Please contact Vontier's communications team
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