



Kalibrate Site Analysis

Highway 65 and Marigold Street Lindsay, CA

Bottom Line Group

Order no. 5832

November 30, 2021

w: www.kalibrate.com

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November 30, 2021

Bottom Line Group
PO Box 1095
Clovis, CA 93613



Order no: 5832
Lat: 36.1849
Long: -119.0916

Dear Jay,

Attached you will find:

- A summary of the simulation scenerio depicting gas, convenience store and diesel projections
- Detailed projection analyses
- Associated reports for your site at Highway 65 and Marigold Street, Lindsay, CA

The site was evaluated as an Interstate location and is currently undeveloped. The study was based on site-specific information supplied by you as reflected in the attached site plan and site recommendation forms.

The attached volume projections are based upon competition as it existed at the time of the survey. If any existing competitive outlets are rebuilt or modernized, or new outlets are opened within the trading area, these projections could be negatively impacted.

Please note the subject site's potential gasoline volume projection and diesel fuel volume projection were derived independently of each other. The retail diesel fuel volume projection does not include volume generated by commercial vehicles or diesel fuel sold from the high-speed pumps. Please also note the subject site's potential c-store sales projection excludes revenues generated by lottery, any liquor other than beer, money orders, quick service restaurant, and car wash.

Please be advised that any deviation in the facility constructed compared to the attached site plan and site recommendation forms may impact this site's estimated volume potentials. These estimated volume potentials have been developed in accordance with Kalibrate's established procedures and Kalibrate does not warrant that the estimated volume projections will be achieved. Kalibrate recommends that the developer and financial provider for the project perform their own financial analysis for the subject site.

Do you want to test additional strategies? Competitor changes? Demand changes? Kalibrate can run additional tactics for you at this location for \$450 per tactic, if purchased within 3 months of the original report.

We have enjoyed working with you on this study. If you have any questions then please contact us.

Sincerely,

Sissi Zhao Lei
Kalibrate

Category	Volumes						Prices	
	Gas		Diesel		CStore		Gas	Diesel
	Brand	Projected Volume	Brand	Projected Volume	Brand	Projected Volume	Price	Price
NR5832 Base Case	Valero	● 110	Valero	● 19	Valero	● 129	● 461.90	● 521.90
NR5832 Case 2	Valero	● 101	Valero	● 18	Valero	● 126	● 471.90	● 531.90
NR5832 Case 3	Sinclair	● 111	Sinclair	● 18	Sinclair	● 127	● 451.90	● 511.90
NR5832 Case 4	Valero	● 130	Valero	● 21	Valero	● 139	● 441.90	● 501.90

In total, 4 simulation has been carried out to project gasoline,diesel and c-store. The simulation chosen was the result of thorough consultation with the site contact Jay Virk This simulation has been run within Kalibrate Planning®, utilizing detailed gas, diesel and c-store data across the US and specifically, in the Lindsay area.

BASE CASE:

- Build a Valero branded station with 6 pumps / 12 fueling positions of gasoline and diesel
- Set the gas price 10 cents above the nearby competitive Arco station located at 951 Hermosa St / Hwy 65, Lindsay
- Build a Valero branded convenience store in a 4,500 sq. ft. building, with 21 dedicated parking spaces and 30 cooler doors
- In the convenience store, build a Valero branded quick service restaurant
- Set the hours of operation to 19 hours a day, 7 days a week

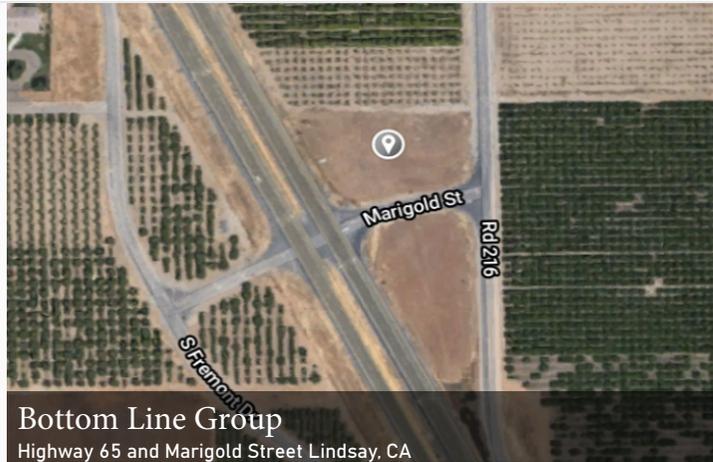
Detailed findings and analysis can be found throughout this report

* Gasoline & Diesel Volumes: Gallons (000s)/Month. Convenience store & QSR Volumes: \$(000s)/Month. Distances: Miles. Prices: \$

Subject site details

Bottom Line Group

Highway 65 and Marigold Street Lindsay, CA



Bottom Line Group
Highway 65 and Marigold Street Lindsay, CA

General		Location/Ratings		Traffic	
Date Survey	11-18-21	Bad Paint	x	Access to 3rd Street	x
District	Lindsay	Has Canopy	x	Motorway Proximity	<= 0.1 Miles
Excess Trash	x	Hi Rise Sign	✓	Primary St Barrier	Full Median
Local Number	0	Hypermarket Type	Not a Hypermarket	Primary St Number of Thru Lanes	2
Operation Type	Independent	Landscaping	Minimal	Primary St Traffic Count	23000
Site Direction	NE	Location Type	Interstate	Primary Street Remote Access	x
Site Location	T-Intersection	Lot Depth (m)	225	Secondary St Barrier	None
Site Name	Valero NR5832	Lot Front (m)	225	Secondary St Number of Thru Lanes	1
		Low Small Sign	x	Secondary St Remote Access	x
		Oasis	x	Secondary St Traffic Count	1000
		Physical Damage	x		
		Stains/Bad Pvmt	x		
		Stop Fuel Or Truck	x		
Location/Ratings					
Blockage	x				

Fuel	Prices/Service/Hours	Cstore	Carwash	Other
Diesel Offered	✓	Cash Registers	Wash Offered	Wash Distance to Nearest Competitor
Gas Offered	✓	Cooler Doors	Wash Brand Name	Wash Competitors
Diesel Brand Name	Valero	Dedicated Park. Spaces	Short Tunnel	Shop Competitors
Gas Brand Name	Valero	Hypermarket	Long Tunnel	QSR Distance to Nearest Competitor
Layout of Forecourt	Parallel	Inside Appearance	In Bay/Whouse	Number of QSR Competitors
Gas Blend	E10	Shop Brand		Gas Competitors
Bypass Lanes	7	Shop Building Size		Distance to Nearest Gas Offer (Kms)
Gas Street Signs	2	Shop Offered		Distance to Nearest Diesel Offer (Kms)
		Shop Type		Distance to Nearest C-Store Offer (Kms)
				Diesel Competitors
				Auto Repair Bays
Pumps/Fueling Positions		Products	Food	
Diesel Pumps	6	Bakery	Price Level	
Diesel SFP	12	Cold Beer	Number of parking spaces dedicated to QSR	
Fueling Position Penalty	x	Deli	QSR Brand Name	
Gas Attend Pumps	0		QSR Facility Type	
Gas Attend SFP	0		Catering	
Gas Self-Service Pumps	6			
Gas Self-Service SFP	12			
MPD Pumps	x			
Pump Islands (info only)	0			
		Prices/Service/Hours		Volumes
		Open Saturdays		Diesel Volume
		Open Sundays		Gas Volume
		Shop Opening Hours (Mon-Fri)		Shop Volume

Attribute	Base Case	Case 2	Case 3	Case 4
Gas Self-Service Price	461.9	471.9	451.9	441.9
Gas Brand Name	Valero	Valero	Sinclair	Valero
Gas Projection	110	101	111	130
Variance to Base		▼ -9 [-8%]	▲ +1 [+1%]	▲ +20 [+18%]
Diesel Price	521.9	531.9	511.9	501.9
Diesel Brand Name	Valero	Valero	Sinclair	Valero
Diesel Projection	19	18	18	21
Variance to Base		▼ -1 [-5%]	▼ -1 [-5%]	▲ +2 [+11%]
Shop Brand	Valero	Valero	Sinclair	Valero
CStore Projection	129	126	127	139
Variance to Base		▼ -3 [-2%]	▼ -2 [-2%]	▲ +10 [+8%]

Comments:

All site characteristics, except for brand and price remained constant across all simulations.

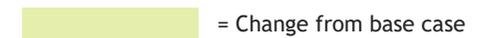
In the Base Case, branding the fuel and C-store as Valero, and setting the fuel prices 10 cents above the nearby competitive Arco branded station, the subject site is estimated to achieve 110,000 gallons per month in gas sales and 19,000 gallons in diesel sales. The C-store monthly sales is projected at \$129,000.

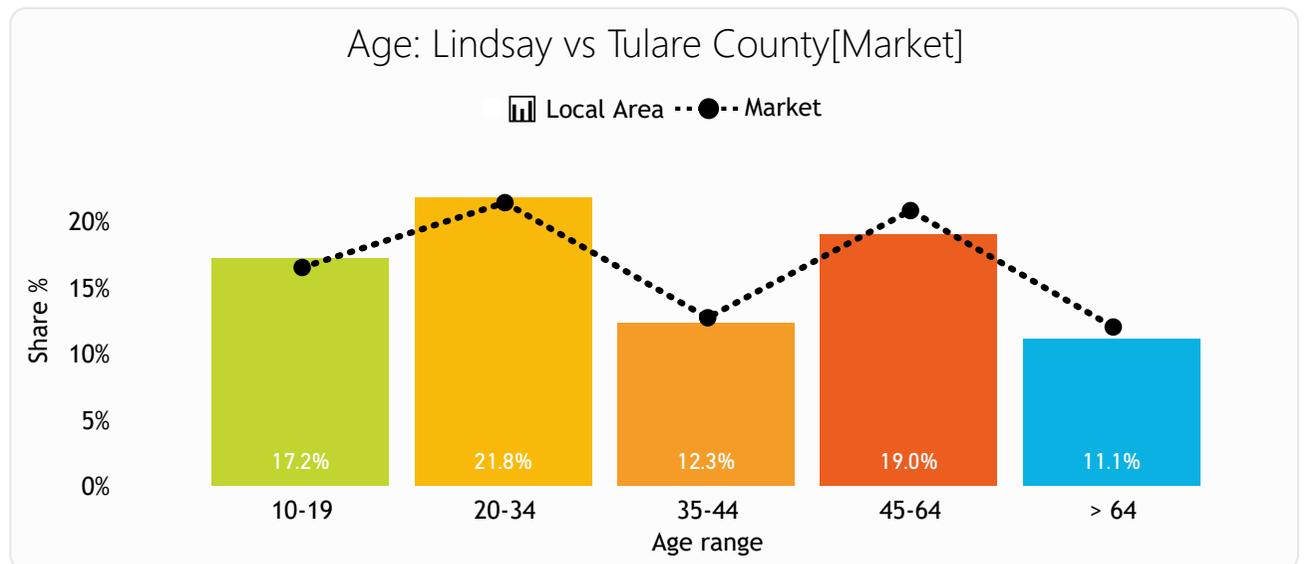
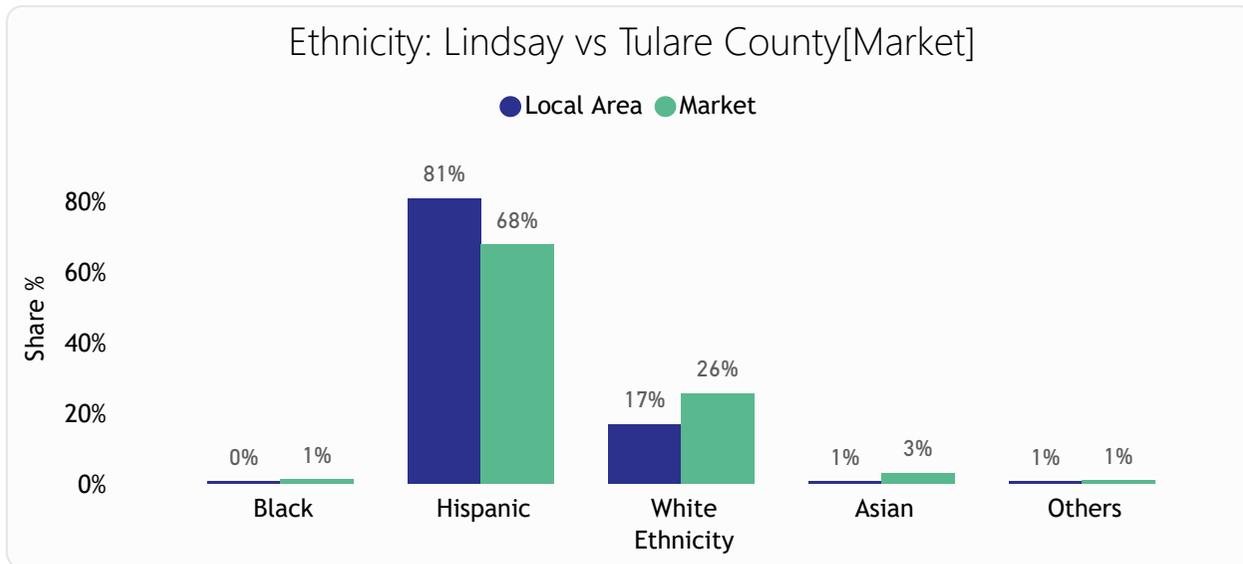
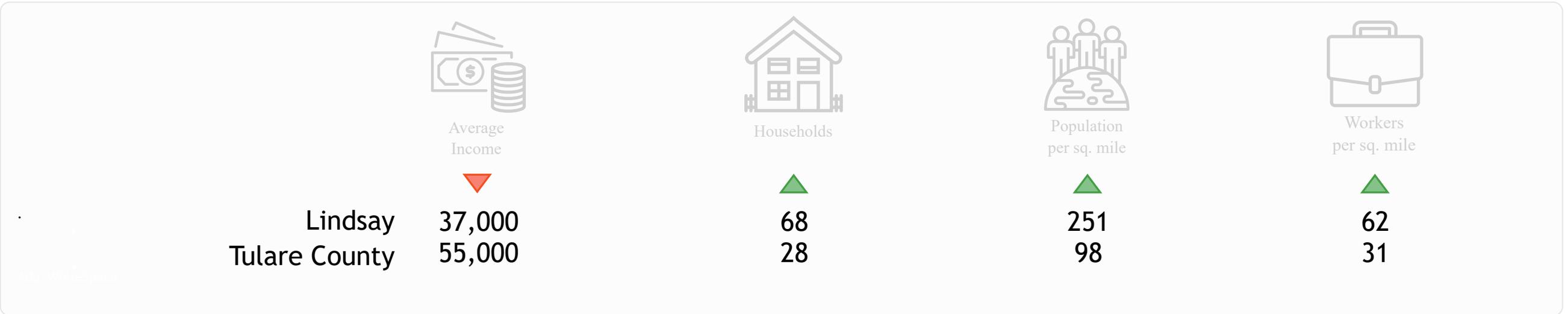
In Case 2, when setting the fuel price 20 cents above the competitive Arco site, the subject site is estimated see a decrease of 9,000 gallons on monthly gas volumes, and 1,000 gallons on monthly diesel volumes, when compared to the base case. The C-store will also see a sales drop of \$3,000 per month.

In Case 3, changing fuel and C-store brand to Sinclair, and price matching the competitive Arco site, the subject site is estimated to achieve 111,000 gallons per month in gas sales and 18,000 gallons in diesel sales. The C-store monthly sales is projected at \$127,000.

In case 4, setting fuel price at 10 cents below the competitive Arco site, the subject site is projected to achieve 130,000 gallons on monthly gas volumes, 21,000 gallons on monthly diesel volumes. The C-store monthly sales is projected at \$139,000.

* Gasoline & Diesel Volumes: Gallons (000s)/Month. Convenience store & QSR Volumes: \$(000s)/Month. Distances: Miles. Prices: \$





Comments: Lindsay is a city in Tulare County, California, situated 14 miles SE of Visalia, California. The number of households, workers per sq. mile and the population per sq. mile are well above the market average. The median household income in the local area is at \$37,000 per year which is below the market average. Local residents are predominantly White, aged 20-34 years old.

Main competitor sites in the local area

Bottom Line Group

Highway 65 and Marigold Street Lindsay, CA

Site ID	Distance	Fuel Logo	Fuel Name	CStore Logo	CStore Name	QSR Logo	QSR Name	Gas Pumps	Gas Self Price	Gas Volume	Diesel Volume	CStore Volume
40065	0.93		Sierra Express Mart		Sierra Express Mart			3	\$4.30	27	1	31
40066	1.25		Chevron		Chevron		Chevron	2	\$4.90	33		41
40069	1.31		G 1		G 1		G1	4	\$4.40	31	2	38
40072	1.37		Valero		Quality Mart			2	\$4.80	33		37
40071	1.39		Fastrip		Fastrip		Quick Eats	4	\$4.40	188	14	136
40068	1.44		76		Lindsay		76	4	\$4.90	71	31	84
40067	1.49		Arco		AMPM			4	\$4.52	221	6	138
40075	1.76		Willies		Willies		Willies	3	\$4.60	51	6	84
40070	1.83		A 1		A 1		A 1	2	\$4.40	28		42
40074	1.84		Day N Night		Day N Night		Day N Night	2	\$4.40	24		46
12621	2.34		Chevron		Chevron		Boondoggles	4	\$5.00	92	14	114
40062	3.29		Strathmore		Strathmore		Strathmore	2	\$4.40	26		44
40063	3.31		Handy Market		Handy Market		Handy Market	2	\$4.50	33		61
12102	3.62		Valley Fuel		Plainview Mk		Plainview Mk	2	\$4.50	42	4	66
12103	4.02		Sinclair		Suhovy Liquo		Sinclair	2	\$4.70	46	31	84
12104	7.74		Shell		Shell		Port Of Subs	4	\$4.87	144		131
12105	7.82		Chevron		Extramile			4	\$5.10	117	9	52
12106	7.85		Valero		Valero			4	\$4.60	51		47

Comments:

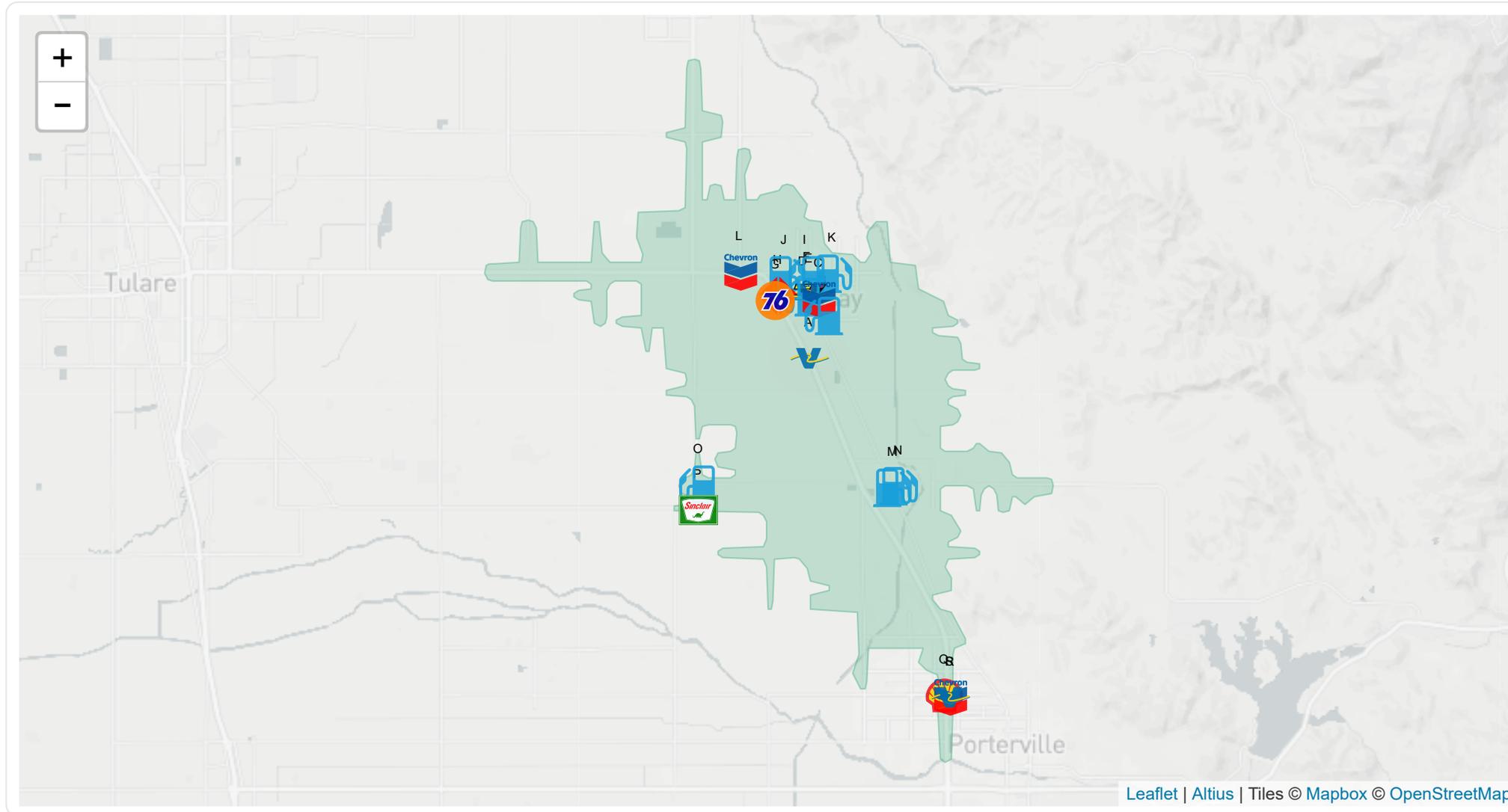
The closest fuel site is Sierra Express Mart (#40065) located 0.93 miles away, at 508 Mirage Ave. The Sierra Express Mart also is the lowest priced among the competitors in the trade area at \$4.30 per gallon. Arco(#40067) is the only site in the are selling over 200,000 gallons per month, and also has the highest C-store sales at \$138,000 per month. The pricing posture for the subject site in the base case scenario (\$4.62) is slightly below the market average for the local area which is \$4.63

* Gasoline & Diesel Volumes: Gallons (000s)/Month. Convenience store & QSR Volumes: \$(000s)/Month. Distances: Miles. Prices: \$

Map of fuel stations in the local area

Bottom Line Group

Highway 65 and Marigold Street Lindsay, CA



ID	Site ID	Distance	Brand	Name
A	12101			Valero
B	40065	0.93		Sierra Express Mar
C	40066	1.25		Chevron
D	40069	1.31		G 1
E	40072	1.37		Valero
F	40071	1.39		Fastrip
G	40068	1.44		76
H	40067	1.49		Arco
I	40075	1.76		Willies
J	40070	1.83		A 1
K	40074	1.84		Day N Night
L	12621	2.34		Chevron
M	40062	3.29		Strathmore
N	40063	3.31		Handy Market
O	12102	3.62		Valley Fuel
P	12103	4.02		Sinclair
Q	12104	7.74		Shell
R	12105	7.82		Chevron
S	12106	7.85		Valero

Comments:

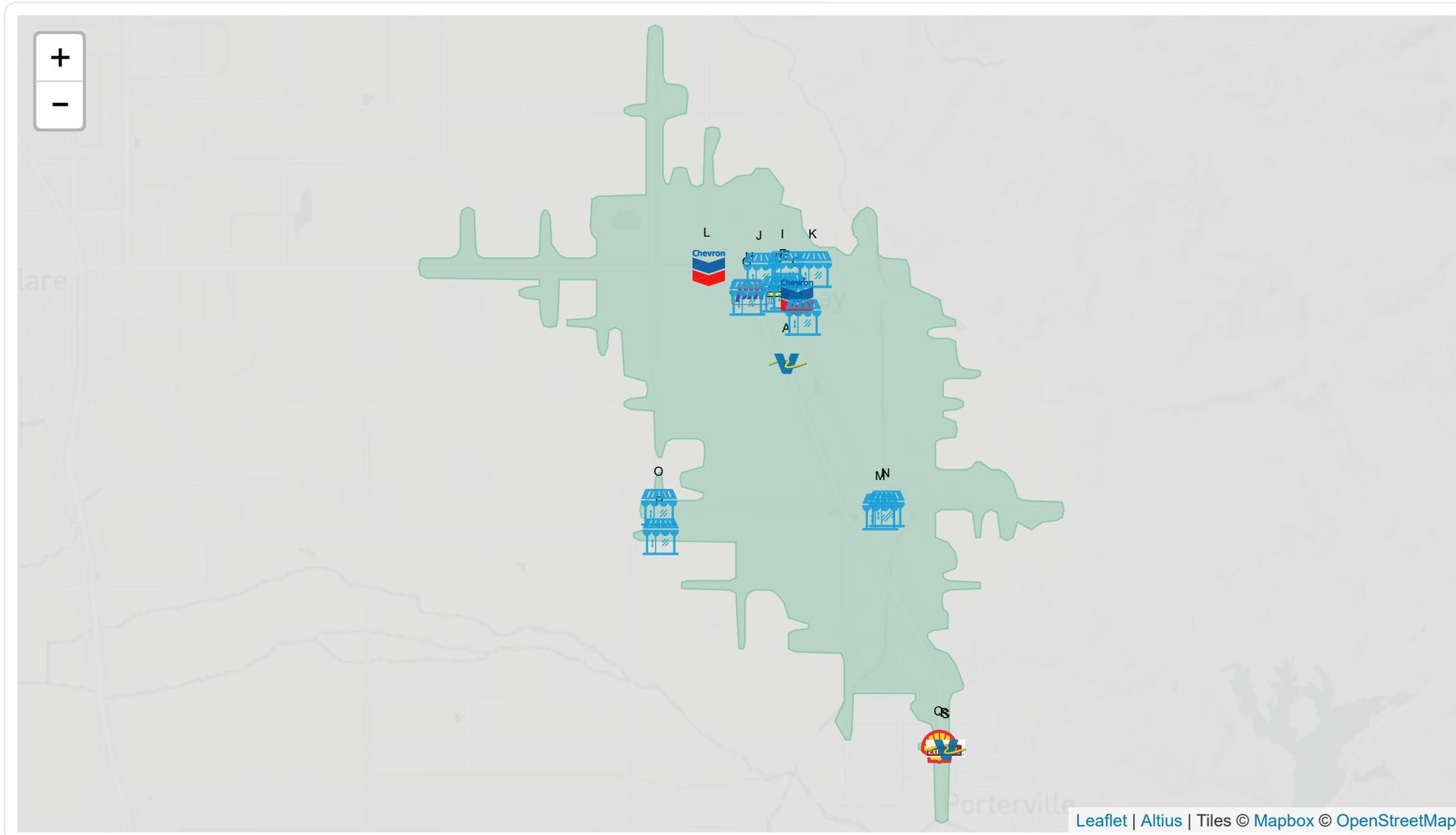
This map shows all fuel competition within a 10 minute drive-time polygon overlaid in green.

Shaded Area = 10min drive time from your site

Map of convenience store sites in the local area

Bottom Line Group

Highway 65 and Marigold Street Lindsay, CA



ID	Site ID	Distance	Brand	Name
A	12101			Valero
B	40065	0.93		Sierra Express Mart
C	40066	1.25		Chevron
D	40069	1.31		G 1
E	40072	1.37		Quality Mart
F	40071	1.39		Fastrip
G	40068	1.44		Lindsay
H	40067	1.49		AMPM
I	40075	1.76		Willies
J	40070	1.83		A 1
K	40074	1.84		Day N Night
L	12621	2.34		Chevron
M	40062	3.29		Strathmore
N	40063	3.31		Handy Market
O	12102	3.62		Plainview Mk
P	12103	4.02		Suhovy Liquo
Q	12104	7.74		Shell
R	12105	7.82		Extramile
S	12106	7.85		Valero

Comments:

This map shows all local C-Store competition within a 10 minute drive-time polygon overlaid in green.

Shaded Area = 10min drive time from your site

Base case: Impact on competitor volumes within the local area

Bottom Line Group

Highway 65 and Marigold Street Lindsay, CA

Site ID	Brand	Name	Change in Gasoline Volume			
			Projected	Actual	Vol Change	% Change
40069		G 1	28	31	-3	-9.70%
12102		Valley Fuel	38	42	-4	-9.50%
40063		Handy Market	30	33	-3	-9.10%
40066		Chevron	30	33	-3	-9.10%
40072		Valero	30	33	-3	-9.10%
12104		Shell	131	144	-13	-9.00%
12103		Sinclair	42	46	-4	-8.70%
12621		Chevron	84	92	-8	-8.70%
40067		Arco	202	221	-19	-8.60%
12105		Chevron	107	117	-10	-8.50%
40068		76	65	71	-6	-8.50%
40071		Fastrip	172	188	-16	-8.50%
40074		Day N Night	22	24	-2	-8.30%
12106		Valero	47	51	-4	-7.80%
40075		Willies	47	51	-4	-7.80%
40062		Strathmore	24	26	-2	-7.70%
40065		Sierra Express ...	25	27	-2	-7.40%
40070		A 1	26	28	-2	-7.10%

Site ID	Brand	Name	Change in Diesel Volume			
			Projected	Actual	Vol Change	% Change
12102		Valley Fuel	3	4	-1	-25.00%
40067		Arco	5	6	-1	-16.70%
40075		Willies	5	6	-1	-16.70%
12103		Sinclair	26	31	-5	-16.10%
40068		76	26	31	-5	-16.10%
12621		Chevron	12	14	-2	-14.30%
40071		Fastrip	12	14	-2	-14.30%
12105		Chevron	8	9	-1	-11.10%

Comments:

When analyzing the competitor impact of the new site opening, we can see that the majority of competitors' gas volumes are impacted more than 7%. In terms of gasoline gallons lost, the Arco (#40067) is losing the greatest amount at 19,000 gallons of gasoline per month.

The Sinclair(#12103) and 76(#40068) are impacted more than other fuel stations on diesel volumes, both sites are projected to lose around 5,000 gallons of diesel per month.

Base Case: Impact on competitor volumes within the local area

Bottom Line Group

Highway 65 and Marigold Street Lindsay, CA

Site ID	Brand	Name	Change in Convenience Store Sales			
			Projected	Actual	Vol Change	% Change
40074		Day N Night	41	46	-5	-10.90%
40072		Quality Mart	33	37	-4	-10.80%
12103		Suhovy Liquo	75	84	-9	-10.70%
40068		Lindsay	75	84	-9	-10.70%
40075		Willies	75	84	-9	-10.70%
12102		Plainview Mk	59	66	-7	-10.60%
12106		Valero	42	47	-5	-10.60%
12621		Chevron	102	114	-12	-10.50%
40069		G 1	34	38	-4	-10.50%
40071		Fastrip	122	136	-14	-10.30%
40067		AMPM	124	138	-14	-10.10%
12104		Shell	118	131	-13	-9.90%
40063		Handy Market	55	61	-6	-9.80%
40066		Chevron	37	41	-4	-9.80%
40065		Sierra Express Mart	28	31	-3	-9.70%
12105		Extramile	47	52	-5	-9.60%
40070		A 1	38	42	-4	-9.50%
40062		Strathmore	40	44	-4	-9.10%

Comments:

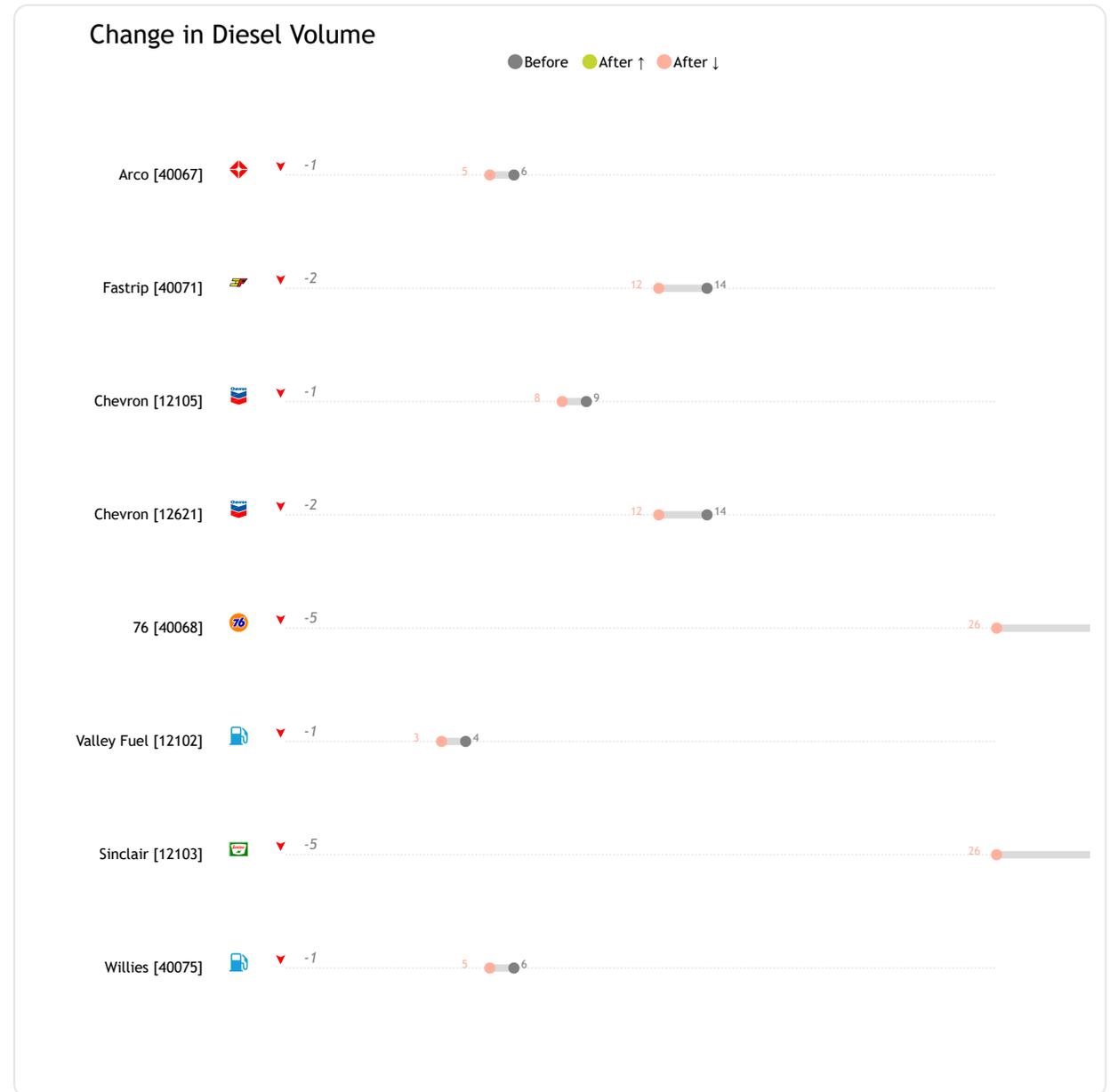
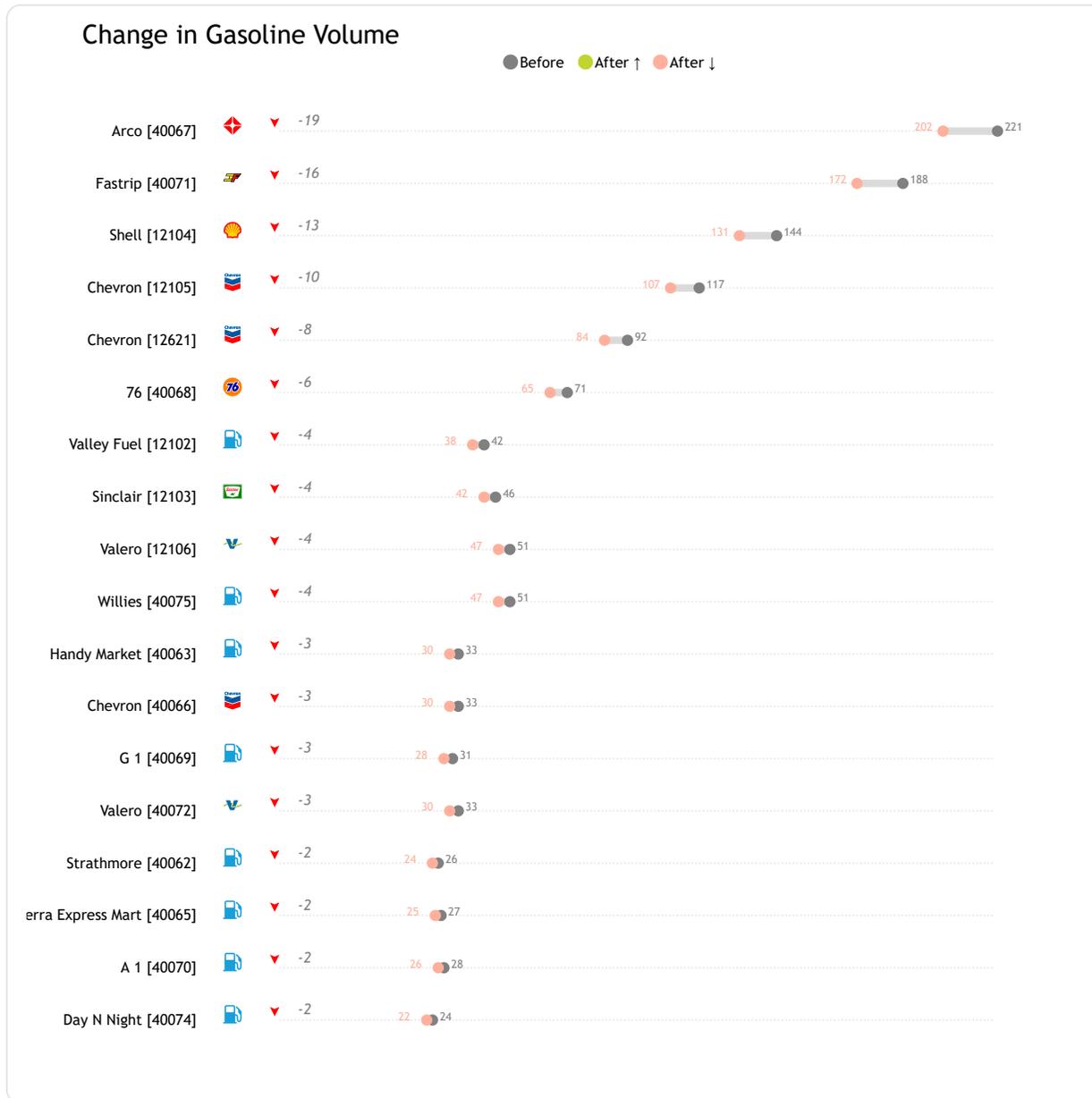
Majority of the local C-stores are projected to see a impact around 10%. The AMPM (#40067) and Fastip(#40071) are both losing the greatest amount at \$14,000 per month.

Any sites that have been impacted by less than \$1,000 per month in sales have been excluded from this page of the report.

Base case: Impact on competitor volumes within the local area

Bottom Line Group

Highway 65 and Marigold Street Lindsay, CA

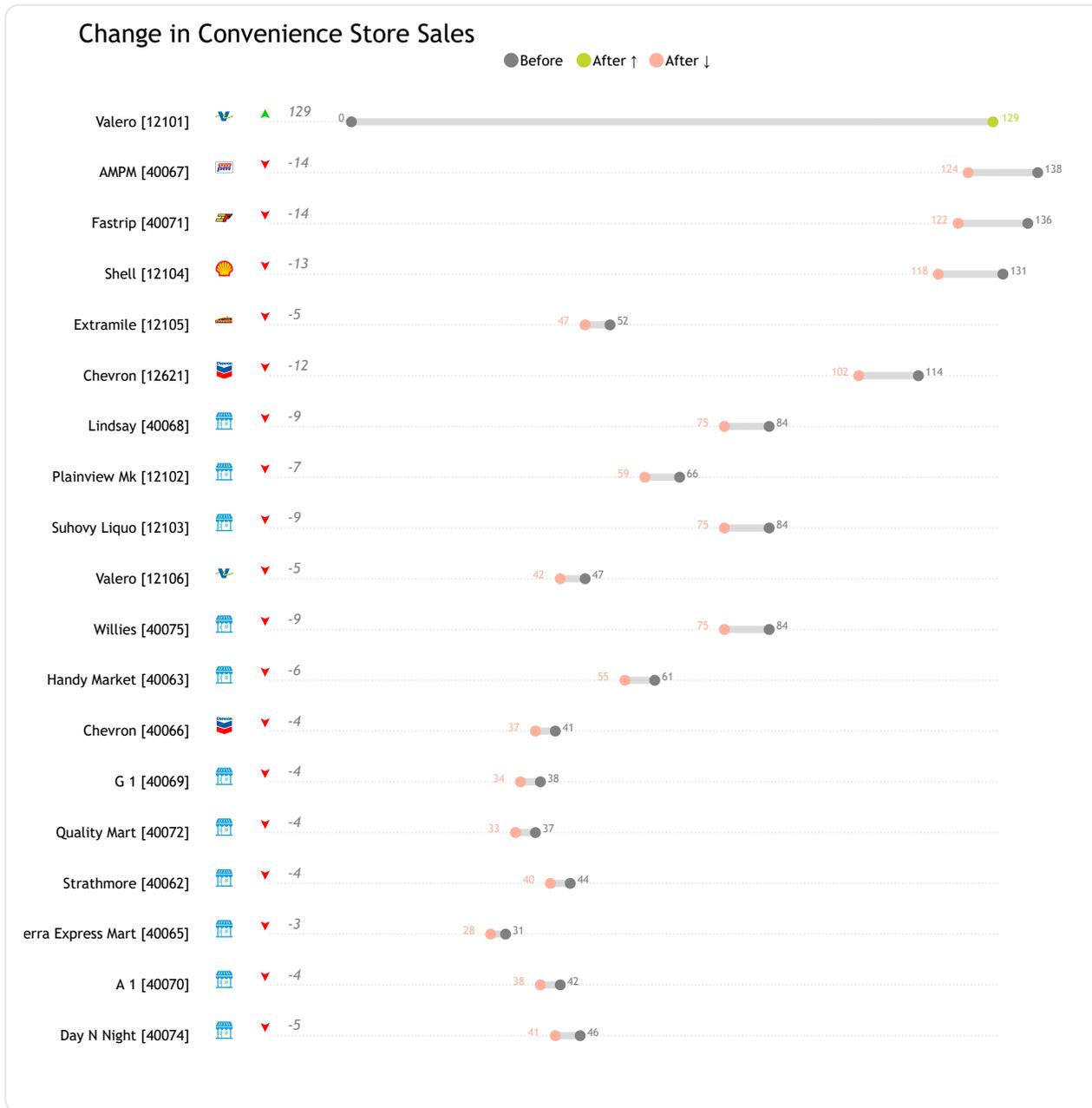


* Gasoline & Diesel Volumes: Gallons (000s)/Month. Convenience store & QSR Volumes: \$(000s)/Month. Distances: Miles. Prices: \$

Base case: Impact on competitor volumes within the local area

Bottom Line Group

Highway 65 and Marigold Street Lindsay, CA



* Gasoline & Diesel Volumes: Gallons (000s)/Month. Convenience store & QSR Volumes: \$(000s)/Month. Distances: Miles. Prices: \$

Case 2: Impact on competitor volumes within the local area

Bottom Line Group

Highway 65 and Marigold Street Lindsay, CA

Site ID	Brand	Name	Change in Gasoline Volume			
			Projected	Actual	Vol Change	% Change
40063		Handy Market	30	33	-3	-9.10%
40066		Chevron	30	33	-3	-9.10%
40072		Valero	30	33	-3	-9.10%
12103		Sinclair	42	46	-4	-8.70%
40068		76	65	71	-6	-8.50%
12104		Shell	132	144	-12	-8.30%
40074		Day N Night	22	24	-2	-8.30%
40067		Arco	203	221	-18	-8.10%
40071		Fastrip	173	188	-15	-8.00%
12106		Valero	47	51	-4	-7.80%
40075		Willies	47	51	-4	-7.80%
12105		Chevron	108	117	-9	-7.70%
40062		Strathmore	24	26	-2	-7.70%
12621		Chevron	85	92	-7	-7.60%
40065		Sierra Express ...	25	27	-2	-7.40%
12102		Valley Fuel	39	42	-3	-7.10%
40070		A 1	26	28	-2	-7.10%
40069		G 1	29	31	-2	-6.50%

Site ID	Brand	Name	Change in Diesel Volume			
			Projected	Actual	Vol Change	% Change
12102		Valley Fuel	3	4	-1	-25.00%
40067		Arco	5	6	-1	-16.70%
40075		Willies	5	6	-1	-16.70%
12103		Sinclair	26	31	-5	-16.10%
40068		76	26	31	-5	-16.10%
12621		Chevron	12	14	-2	-14.30%
40071		Fastrip	12	14	-2	-14.30%
12105		Chevron	8	9	-1	-11.10%

* Gasoline & Diesel Volumes: Gallons (000s)/Month. Convenience store & QSR Volumes: \$(000s)/Month. Distances: Miles. Prices: \$

Case 2: Impact on competitor volumes within the local area

Bottom Line Group

Highway 65 and Marigold Street Lindsay, CA

Site ID	Brand	Name	Change in Convenience Store Sales			
			Projected	Actual	Vol Change	% Change
40074		Day N Night	41	46	-5	-10.90%
40072		Quality Mart	33	37	-4	-10.80%
12102		Plainview Mk	59	66	-7	-10.60%
12106		Valero	42	47	-5	-10.60%
40069		G 1	34	38	-4	-10.50%
40067		AMPM	124	138	-14	-10.10%
12104		Shell	118	131	-13	-9.90%
40063		Handy Market	55	61	-6	-9.80%
40066		Chevron	37	41	-4	-9.80%
40065		Sierra Express Mart	28	31	-3	-9.70%
12105		Extramile	47	52	-5	-9.60%
12621		Chevron	103	114	-11	-9.60%
40071		Fastrip	123	136	-13	-9.60%
12103		Suhovy Liquo	76	84	-8	-9.50%
40068		Lindsay	76	84	-8	-9.50%
40070		A 1	38	42	-4	-9.50%
40075		Willies	76	84	-8	-9.50%
40062		Strathmore	40	44	-4	-9.10%

* Gasoline & Diesel Volumes: Gallons (000s)/Month. Convenience store & QSR Volumes: \$(000s)/Month. Distances: Miles. Prices: \$

Case 2: Impact on competitor volumes within the local area

Bottom Line Group

Highway 65 and Marigold Street Lindsay, CA

Change in Gasoline Volume



Change in Diesel Volume

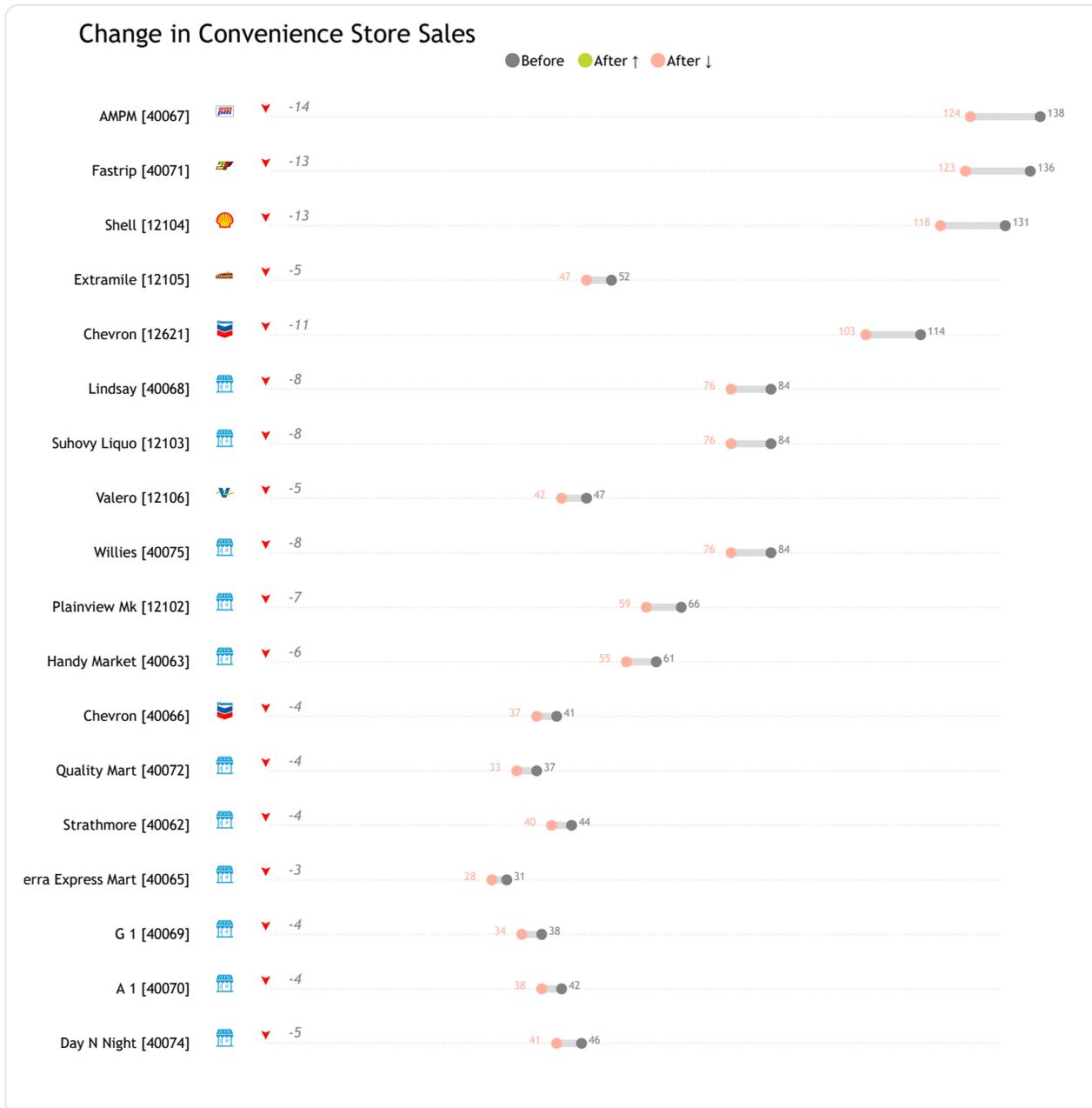


* Gasoline & Diesel Volumes: Gallons (000s)/Month. Convenience store & QSR Volumes: \$(000s)/Month. Distances: Miles. Prices: \$

Case 2: Impact on competitor volumes within the local area

Bottom Line Group

Highway 65 and Marigold Street Lindsay, CA



* Gasoline & Diesel Volumes: Gallons (000s)/Month. Convenience store & QSR Volumes: \$(000s)/Month. Distances: Miles. Prices: \$

Case 3: Impact on competitor volumes within the local area

Bottom Line Group

Highway 65 and Marigold Street Lindsay, CA

Site ID	Brand	Name	Change in Gasoline Volume			
			Projected	Actual	Vol Change	% Change
40069		G 1	28	31	-3	-9.70%
12102		Valley Fuel	38	42	-4	-9.50%
40063		Handy Market	30	33	-3	-9.10%
40066		Chevron	30	33	-3	-9.10%
40072		Valero	30	33	-3	-9.10%
12104		Shell	131	144	-13	-9.00%
40071		Fastrip	171	188	-17	-9.00%
12103		Sinclair	42	46	-4	-8.70%
12621		Chevron	84	92	-8	-8.70%
40067		Arco	202	221	-19	-8.60%
12105		Chevron	107	117	-10	-8.50%
40068		76	65	71	-6	-8.50%
40074		Day N Night	22	24	-2	-8.30%
12106		Valero	47	51	-4	-7.80%
40075		Willies	47	51	-4	-7.80%
40062		Strathmore	24	26	-2	-7.70%
40065		Sierra Express ...	25	27	-2	-7.40%
40070		A 1	26	28	-2	-7.10%

Site ID	Brand	Name	Change in Diesel Volume			
			Projected	Actual	Vol Change	% Change
12102		Valley Fuel	3	4	-1	-25.00%
40067		Arco	5	6	-1	-16.70%
40075		Willies	5	6	-1	-16.70%
12103		Sinclair	26	31	-5	-16.10%
40068		76	26	31	-5	-16.10%
12621		Chevron	12	14	-2	-14.30%
40071		Fastrip	12	14	-2	-14.30%
12105		Chevron	8	9	-1	-11.10%

* Gasoline & Diesel Volumes: Gallons (000s)/Month. Convenience store & QSR Volumes: \$(000s)/Month. Distances: Miles. Prices: \$

Case 3: Impact on competitor volumes within the local area

Bottom Line Group

Highway 65 and Marigold Street Lindsay, CA

Site ID	Brand	Name	Change in Convenience Store Sales			
			Projected	Actual	Vol Change	% Change
40074		Day N Night	41	46	-5	-10.90%
40072		Quality Mart	33	37	-4	-10.80%
12102		Plainview Mk	59	66	-7	-10.60%
12106		Valero	42	47	-5	-10.60%
40069		G 1	34	38	-4	-10.50%
40071		Fastrip	122	136	-14	-10.30%
40067		AMPM	124	138	-14	-10.10%
12104		Shell	118	131	-13	-9.90%
40063		Handy Market	55	61	-6	-9.80%
40066		Chevron	37	41	-4	-9.80%
40065		Sierra Express Mart	28	31	-3	-9.70%
12105		Extramile	47	52	-5	-9.60%
12621		Chevron	103	114	-11	-9.60%
12103		Suhovy Liquo	76	84	-8	-9.50%
40068		Lindsay	76	84	-8	-9.50%
40070		A 1	38	42	-4	-9.50%
40075		Willies	76	84	-8	-9.50%
40062		Strathmore	40	44	-4	-9.10%

* Gasoline & Diesel Volumes: Gallons (000s)/Month. Convenience store & QSR Volumes: \$(000s)/Month. Distances: Miles. Prices: \$

Case 3: Impact on competitor volumes within the local area

Bottom Line Group

Highway 65 and Marigold Street Lindsay, CA

Change in Gasoline Volume

● Before ● After ↑ ● After ↓



Change in Diesel Volume

● Before ● After ↑ ● After ↓

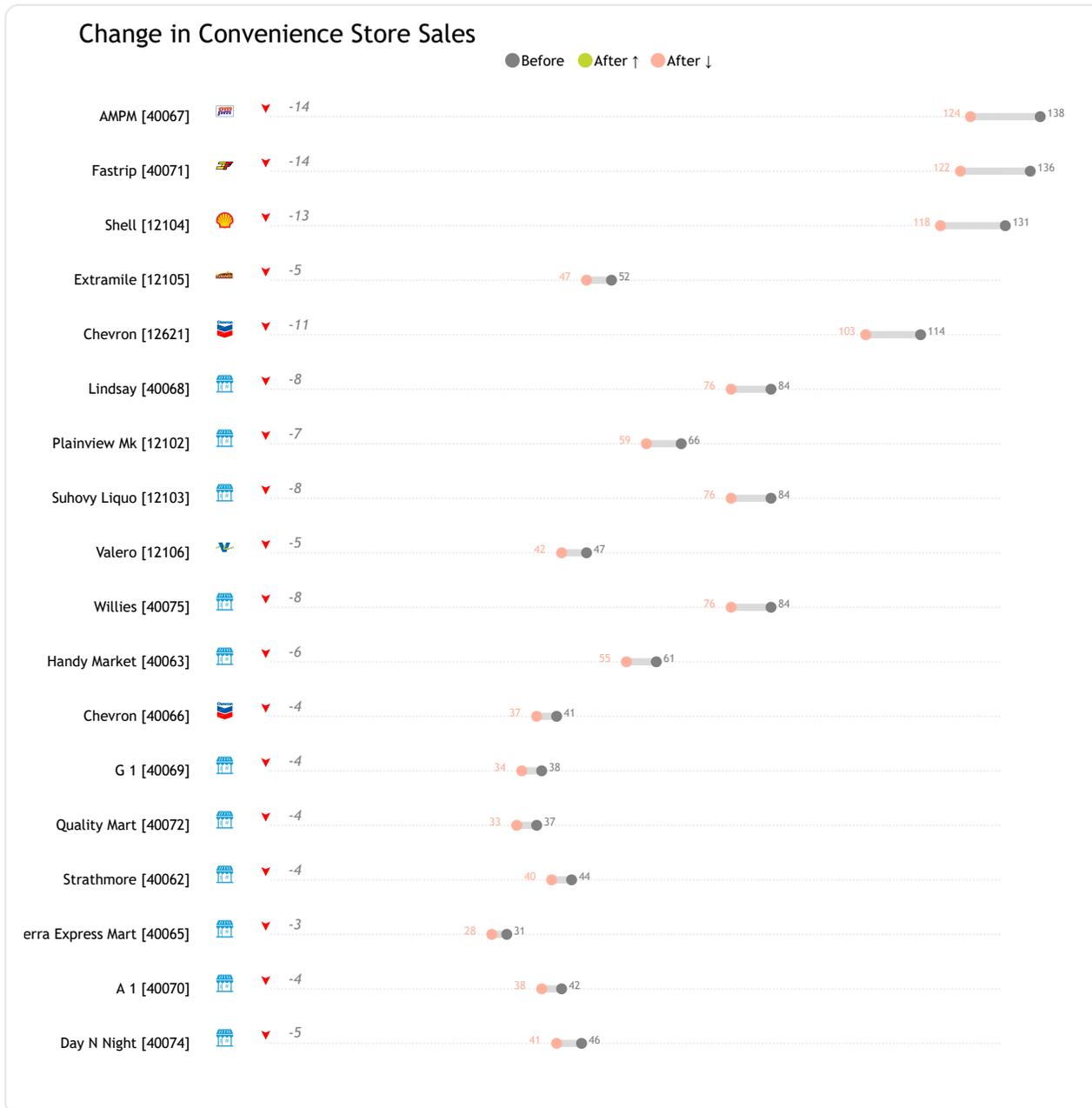


* Gasoline & Diesel Volumes: Gallons (000s)/Month. Convenience store & QSR Volumes: \$(000s)/Month. Distances: Miles. Prices: \$

Case 3: Impact on competitor volumes within the local area

Bottom Line Group

Highway 65 and Marigold Street Lindsay, CA



* Gasoline & Diesel Volumes: Gallons (000s)/Month. Convenience store & QSR Volumes: \$(000s)/Month. Distances: Miles. Prices: \$

Case 4: Impact on competitor volumes within the local area

Bottom Line Group

Highway 65 and Marigold Street Lindsay, CA

Site ID	Brand	Name	Change in Gasoline Volume			
			Projected	Actual	Vol Change	% Change
40062		Strathmore	23	26	-3	-11.50%
40065		Sierra Express ...	24	27	-3	-11.10%
12103		Sinclair	41	46	-5	-10.90%
12621		Chevron	82	92	-10	-10.90%
40070		A 1	25	28	-3	-10.70%
12104		Shell	129	144	-15	-10.40%
40067		Arco	198	221	-23	-10.40%
12105		Chevron	105	117	-12	-10.30%
40071		Fastrip	169	188	-19	-10.10%
40068		76	64	71	-7	-9.90%
12106		Valero	46	51	-5	-9.80%
40075		Willies	46	51	-5	-9.80%
40069		G 1	28	31	-3	-9.70%
12102		Valley Fuel	38	42	-4	-9.50%
40063		Handy Market	30	33	-3	-9.10%
40066		Chevron	30	33	-3	-9.10%
40072		Valero	30	33	-3	-9.10%
40074		Day N Night	22	24	-2	-8.30%

Site ID	Brand	Name	Change in Diesel Volume			
			Projected	Actual	Vol Change	% Change
12102		Valley Fuel	3	4	-1	-25.00%
12105		Chevron	7	9	-2	-22.20%
40067		Arco	5	6	-1	-16.70%
40075		Willies	5	6	-1	-16.70%
12103		Sinclair	26	31	-5	-16.10%
40068		76	26	31	-5	-16.10%
12621		Chevron	12	14	-2	-14.30%
40071		Fastrip	12	14	-2	-14.30%

* Gasoline & Diesel Volumes: Gallons (000s)/Month. Convenience store & QSR Volumes: \$(000s)/Month. Distances: Miles. Prices: \$

Case 4: Impact on competitor volumes within the local area

Bottom Line Group

Highway 65 and Marigold Street Lindsay, CA

Site ID	Brand	Name	Change in Convenience Store Sales			
			Projected	Actual	Vol Change	% Change
40070		A 1	37	42	-5	-11.90%
12105		Extramile	46	52	-6	-11.50%
40063		Handy Market	54	61	-7	-11.50%
40062		Strathmore	39	44	-5	-11.40%
40071		Fastrip	121	136	-15	-11.00%
40067		AMPM	123	138	-15	-10.90%
40074		Day N Night	41	46	-5	-10.90%
40072		Quality Mart	33	37	-4	-10.80%
12103		Suhovy Liquo	75	84	-9	-10.70%
12104		Shell	117	131	-14	-10.70%
40068		Lindsay	75	84	-9	-10.70%
40075		Willies	75	84	-9	-10.70%
12102		Plainview Mk	59	66	-7	-10.60%
12106		Valero	42	47	-5	-10.60%
12621		Chevron	102	114	-12	-10.50%
40069		G 1	34	38	-4	-10.50%
40066		Chevron	37	41	-4	-9.80%
40065		Sierra Express Mart	28	31	-3	-9.70%

* Gasoline & Diesel Volumes: Gallons (000s)/Month. Convenience store & QSR Volumes: \$(000s)/Month. Distances: Miles. Prices: \$

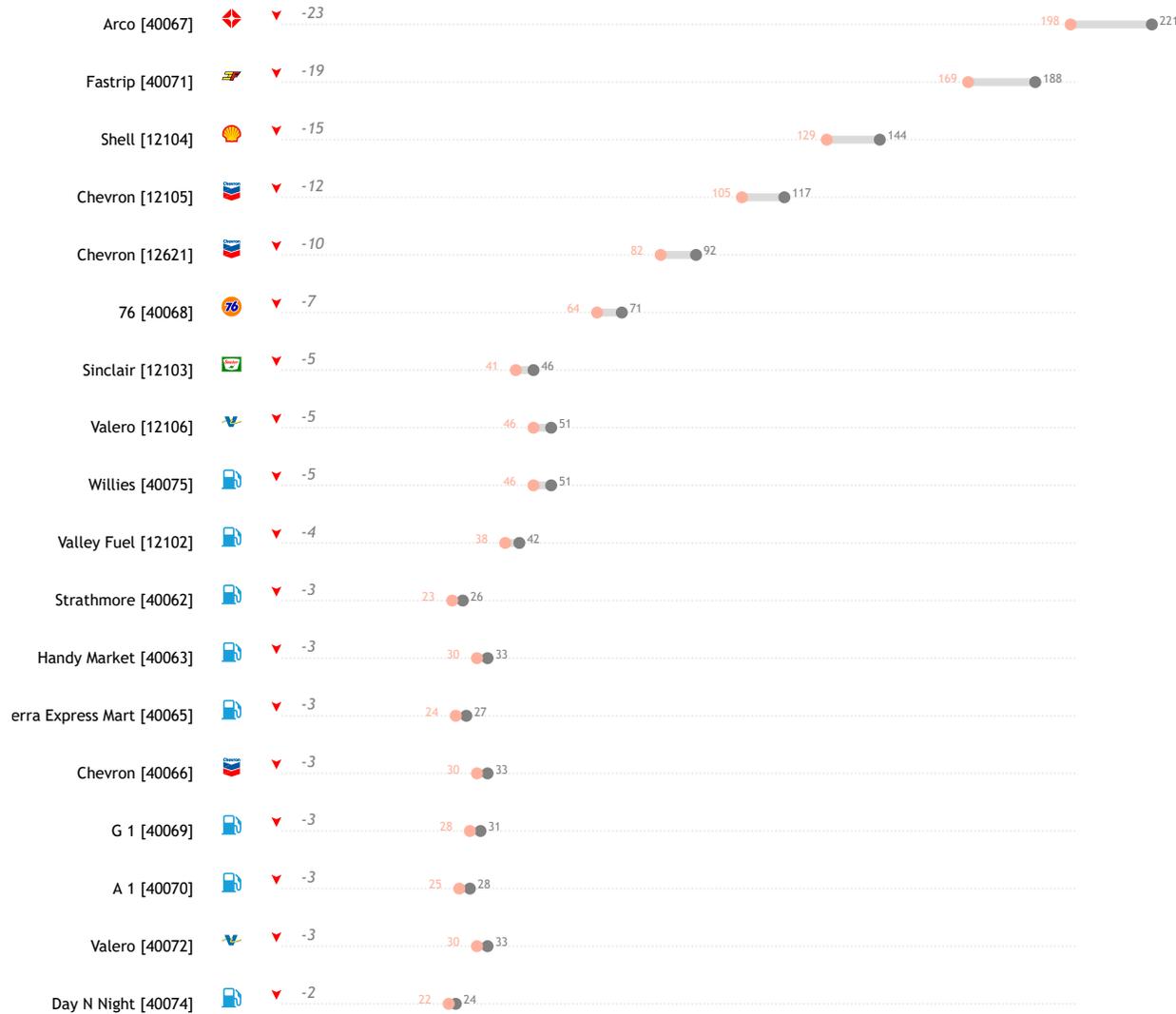
Case 4: Impact on competitor volumes within the local area

Bottom Line Group

Highway 65 and Marigold Street Lindsay, CA

Change in Gasoline Volume

● Before ● After ↑ ● After ↓



Change in Diesel Volume

● Before ● After ↑ ● After ↓

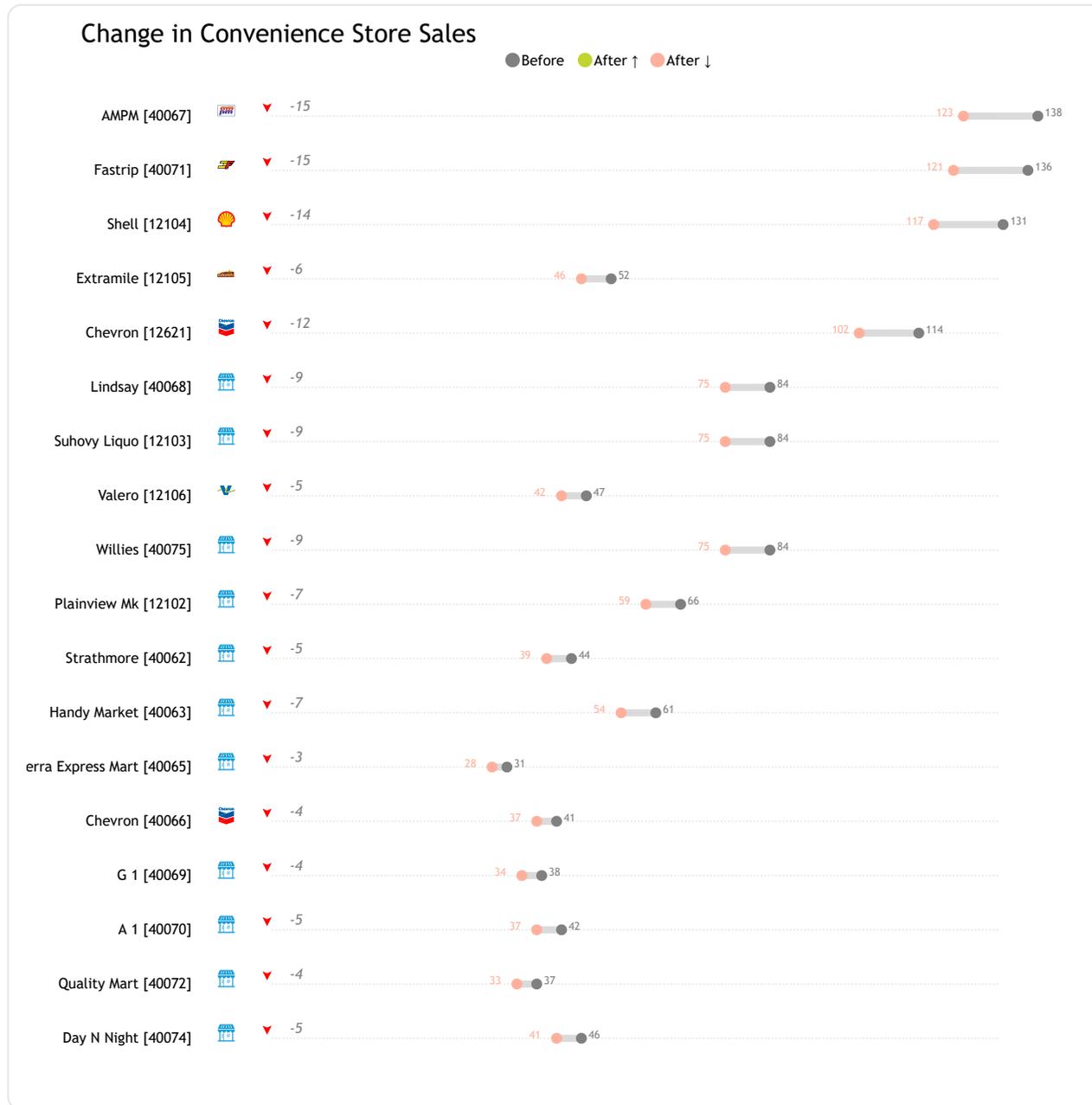


* Gasoline & Diesel Volumes: Gallons (000s)/Month. Convenience store & QSR Volumes: \$(000s)/Month. Distances: Miles. Prices: \$

Case 4: Impact on competitor volumes within the local area

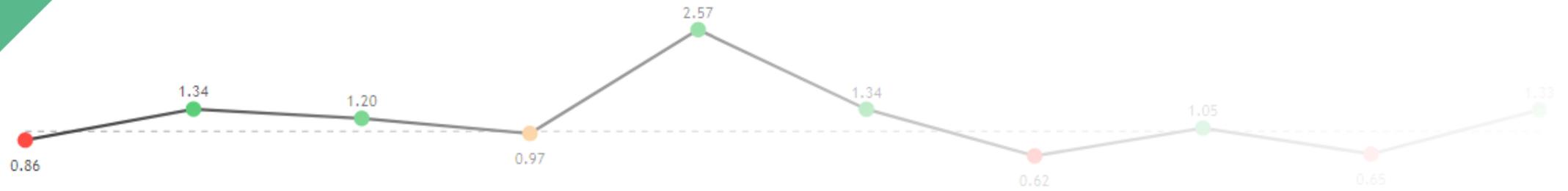
Bottom Line Group

Highway 65 and Marigold Street Lindsay, CA



* Gasoline & Diesel Volumes: Gallons (000s)/Month. Convenience store & QSR Volumes: \$(000s)/Month. Distances: Miles. Prices: \$

Market share overview



Premium offer

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Subject site "7 Elements" Volumes

by Product

Product	Location	Market	Brand	Facility	Merchandising	Price
	87	83 ▼	78 ▼	96 ▲	103 ▲	103 ▲
esel	11	10 ▼	10 ▼	11 ▲	11 ▼	11 ▼
s	112	107 ▼	80 ▼	133 ▲	134 ▲	134 ▲
	80	70 ▼	66 ▼	75 ▲	96 ▲	96 ▲



Premium offer

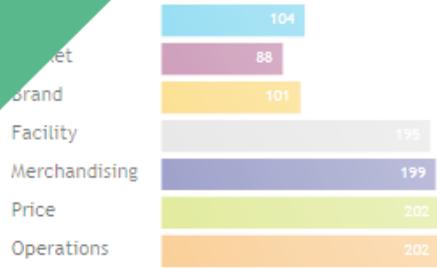
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ces: Miles.

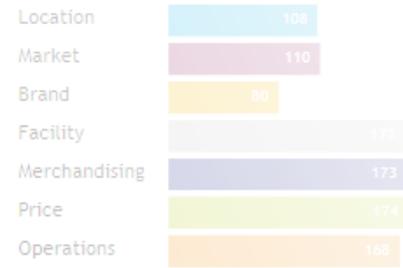
Local Area "7 Elements" volumes

BY SITE

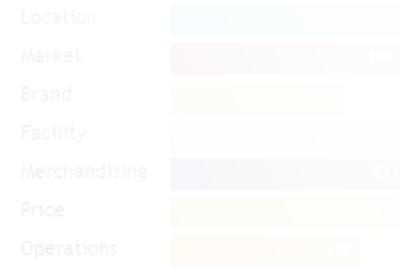
Site: 99999 [Your Brand]



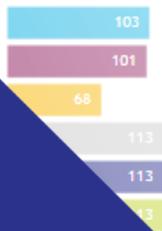
Site: 11124 [Shell]



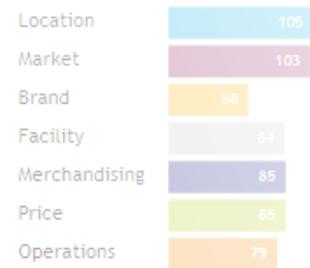
Site: 11029 [Walmart]



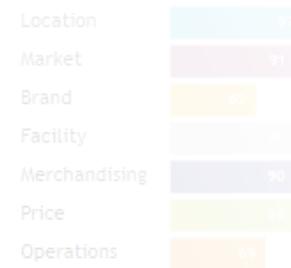
Site: 10011 [76]



Site: 10010 [BP]



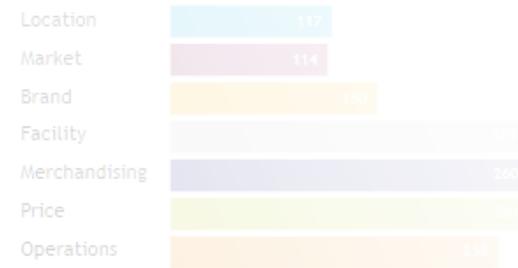
Site: 10009 [Shell]



Site: 12710 [BP]



Site: 11640 [Spinx]



Premium offer

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Competitors in the Local Area

Competitor photo and attributes



508 Mirage Ave / N / Lindmore St, Lindsay

General		Location/Ratings		Traffic	
Site ID	40065	Bad Paint	x	Access to 3rd Street	x
Date Survey	11-18-21	Has Canopy	✓	Motorway Proximity	N/A
District	Lindsay	Hi Rise Sign	x	Primary St Barrier	None
Excess Trash	x	Hypermarket Type	Not a Hypermarket	Primary St Number of Thru Lanes	2
Local Number	5595623434	Landscaping	Minimal	Primary St Traffic Count	9000
Operation Type	Independent	Location Type	City Street	Primary Street Remote Access	x
Site Direction	E	Lot Depth (m)	125	Secondary St Barrier	None
Site Location	Inside	Lot Front (m)	125	Secondary St Number of Thru	0
Site Name	Sierra Express Mart Gas Station	Low Small Sign	x	Secondary St Remote Access	x
		Oasis	x	Secondary St Traffic Count	0
		Physical Damage	x		
		Stains/Bad Pvmt	✓		
		Stop Fuel Or Truck	x		
Location/Ratings					
Blockage	x				

Fuel		Prices/Service/Hours		Cstore		Carwash		Other	
Bypass Lanes	1	Attend Service	x	Cash Registers	1	Wash Offered	x	Wash Distance to Nearest Competitor	1.07
Petrol Street Signs	1	Average Discount	0	Cooler Doors	21	Wash Brand Name	N/A	Wash Competitors	1
Petrol Blend	E10	Company Cards	x	Dedicated Park. Spaces	2	Short Tunnel	x	Shop Competitors	8
Layout of Forecourt	Linear	Diesel Price	459.9	Hypermarket	x	Long Tunnel	x	QSR Distance to Nearest Competitor	0.38
Diesel Brand Name	Sierra Express	Diesel Price Posted	✓	Inside Appearance	Below Average	In Bay/Whouse	x	Petrol Competitors	8
	Mart	Open Saturdays	✓	Shop Brand	Sierra Express			Number of QSR Competitors	6
Petrol Brand Name	Sierra Express	Open Sundays	✓	Shop Building Size	1300			Distance to Nearest Petrol Offer (Kms)	0.38
	Mart	Opening Hours (Mon-Fri)	17	Shop Offered	✓			Distance to Nearest Diesel Offer (Kms)	0.61
Diesel Offered	✓	Petrol Attd Price	0	Shop Type	C-Store			Distance to Nearest C-Store Offer (Kms)	0.38
Petrol Offered	✓	Petrol Attend Posted	x					Diesel Competitors	5
Pumps/Fueling Positions		Petrol Self-Service Posted	✓					Auto Repair Bays	0
Diesel Pumps	1	Petrol Self-Service Price	429.9						
Diesel SFP	2	Self Service	✓	Products					
Fueling Position Penalty	x			Bakery	x	QSR Facility Type	N/A		
MPD Pumps	✓			Cold Beer	✓	QSR Brand Name	N/A		
Petrol Attend Pumps	0			Deli	✓	Number of parking spaces dedicated to QSR	0		
Petrol Attend SFP	0					Catering	x		
Petrol Self-Service Pumps	3							Volumes	
Petrol Self-Service SFP	4							Diesel Volume	1
Pump Islands (info only)	1			Prices/Service/Hours				Petrol Volume	27
				Open Saturdays	✓			Shop Volume	31
				Open Sundays	✓				
				Shop Opening Hours (Mon-Fri)	17				

Competitor photo and attributes



General

Site ID	40069
Date Survey	11-18-21
District	Lindsay
Excess Trash	x
Local Number	5595622168
Operation Type	Independent
Site Direction	SW
Site Location	Corner
Site Name	G 1 Gas Station

Location/Ratings

Blockage	x
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Location/Ratings

Bad Paint	x
Has Canopy	✓
Hi Rise Sign	x
Hypermarket Type	Not a Hypermarket
Landscaping	Minimal
Location Type	City Street
Lot Depth (m)	125
Lot Front (m)	125
Low Small Sign	x
Oasis	x
Physical Damage	x
Stains/Bad Pvmt	✓
Stop Fuel Or Truck	x

Traffic

Access to 3rd Street	x
Motorway Proximity	N/A
Primary St Barrier	None
Primary St Number of Thru Lanes	2
Primary St Traffic Count	10000
Primary Street Remote Access	x
Secondary St Barrier	None
Secondary St Number of Thru	1
Secondary St Remote Access	x
Secondary St Traffic Count	1000

Fuel

Bypass Lanes	1
Petrol Street Signs	1
Petrol Blend	E10
Diesel Brand Name	G 1
Petrol Brand Name	G 1
Layout of Forecourt	Parallel
Diesel Offered	✓
Petrol Offered	✓

Pumps/Fueling Positions

Diesel Pumps	2
Diesel SFP	4
Fueling Position Penalty	x
MPD Pumps	✓
Petrol Attend Pumps	0
Petrol Attend SFP	0
Petrol Self-Service Pumps	4
Petrol Self-Service SFP	8
Pump Islands (info only)	2

Prices/Service/Hours

Attend Service	x
Average Discount	0
Company Cards	x
Diesel Price	445.9
Diesel Price Posted	✓
Open Saturdays	✓
Open Sundays	✓
Opening Hours (Mon-Fri)	20
Petrol Attd Price	0
Petrol Attend Posted	x
Petrol Self-Service Posted	✓
Petrol Self-Service Price	439.9
Self Service	✓

Cstore

Cash Registers	2
Cooler Doors	23
Dedicated Park. Spaces	5
Hypermarket	x
Inside Appearance	Below Average
Shop Brand	G 1
Shop Building Size	1900
Shop Offered	✓
Shop Type	C-Store

Products

Bakery	✓
Cold Beer	✓
Deli	x

Prices/Service/Hours

Open Saturdays	✓
Open Sundays	✓
Shop Opening Hours (Mon-Fri)	20

Carwash

Wash Offered	x
Wash Brand Name	N/A
Short Tunnel	x
Long Tunnel	x
In Bay/Whouse	x

Food

QSR Facility Type	Standard
QSR Brand Name	G1

Number of parking spaces dedicated to QSR	5
Catering	✓

Other

Wash Distance to Nearest Competitor	0.54
Wash Competitors	1
Shop Competitors	10
QSR Distance to Nearest Competitor	0.13
Petrol Competitors	10
Number of QSR Competitors	7
Distance to Nearest Petrol Offer (Kms)	0.13
Distance to Nearest Diesel Offer (Kms)	0.13
Distance to Nearest C-Store Offer (Kms)	0.13
Diesel Competitors	6
Auto Repair Bays	0

Volumes

Diesel Volume	2
Petrol Volume	31
Shop Volume	38

Competitor photo and attributes



195 W Hermosa St / Sweetbrier Ave, Lindsay

General		Location/Ratings		Traffic	
Site ID	40071	Bad Paint	✓	Access to 3rd Street	x
Date Survey	11-18-21	Has Canopy	✓	Motorway Proximity	N/A
District	Lindsay	Hi Rise Sign	x	Primary St Barrier	None
Excess Trash	x	Hypermarket Type	Not a Hypermarket	Primary St Number of Thru Lanes	1
Local Number	5595620820	Landscaping	Minimal	Primary St Traffic Count	11000
Operation Type	Jobber	Location Type	City Street	Primary Street Remote Access	x
Site Direction	NE	Lot Depth (m)	125	Secondary St Barrier	None
Site Location	Corner	Lot Front (m)	175	Secondary St Number of Thru	1
Site Name	Fastrip Gas Station	Low Small Sign	x	Secondary St Remote Access	x
		Oasis	x	Secondary St Traffic Count	2000
		Physical Damage	x		
		Stains/Bad Pvmt	✓		
		Stop Fuel Or Truck	x		
Location/Ratings					
Blockage	x				

Fuel		Prices/Service/Hours		Cstore		Carwash		Other	
Bypass Lanes	0	Attend Service	x	Cash Registers	3	Wash Offered	x	Wash Distance to Nearest Competitor	0.64
Petrol Street Signs	1	Average Discount	10	Cooler Doors	23	Wash Brand Name	N/A	Wash Competitors	1
Petrol Blend	E10	Company Cards	x	Dedicated Park. Spaces	9	Short Tunnel	x	Shop Competitors	10
Diesel Brand Name	Fastrip	Diesel Price	445.9	Hypermarket	x	Long Tunnel	x	QSR Distance to Nearest Competitor	0.13
Petrol Brand Name	Fastrip	Diesel Price Posted	✓	Inside Appearance	Average	In Bay/Whouse	x	Petrol Competitors	10
Layout of Forecourt	Parallel	Open Saturdays	✓	Shop Brand	Fastrip			Number of QSR Competitors	7
Diesel Offered	✓	Open Sundays	✓	Shop Building Size	2600			Distance to Nearest Petrol Offer (Kms)	0.05
Petrol Offered	✓	Opening Hours (Mon-Fri)	24	Shop Offered	✓			Distance to Nearest Diesel Offer (Kms)	0.13
		Petrol Attd Price	0	Shop Type	C-Store			Distance to Nearest C-Store Offer (Kms)	0.05
		Petrol Attend Posted	x					Diesel Competitors	6
		Petrol Self-Service Posted	✓					Auto Repair Bays	0
		Petrol Self-Service Price	439.9						
		Self Service	✓						
Pumps/Fueling Positions				Products					
Diesel Pumps	2			Bakery	x	QSR Facility Type	Standard		
Diesel SFP	4			Cold Beer	✓	QSR Brand Name	Quick Eats		
Fueling Position Penalty	x			Deli	x	Number of parking spaces dedicated to QSR	9		
MPD Pumps	✓					Catering	✓		
Petrol Attend Pumps	0								
Petrol Attend SFP	0								
Petrol Self-Service Pumps	4								
Petrol Self-Service SFP	8								
Pump Islands (info only)	2								
				Prices/Service/Hours				Volumes	
				Open Saturdays	✓			Diesel Volume	14
				Open Sundays	✓			Petrol Volume	188
				Shop Opening Hours (Mon-Fri)	24			Shop Volume	136

Competitor photo and attributes



General

Site ID	40068
Date Survey	11-18-21
District	Lindsay
Excess Trash	x
Local Number	5595623595
Operation Type	Jobber
Site Direction	SW
Site Location	At Location
Site Name	76 Gas Station

Location/Ratings

Blockage	x
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Location/Ratings

Bad Paint	x
Has Canopy	✓
Hi Rise Sign	x
Hypermarket Type	Not a Hypermarket
Landscaping	Minimal
Location Type	Interstate
Lot Depth (m)	225
Lot Front (m)	225
Low Small Sign	✓
Oasis	x
Physical Damage	x
Stains/Bad Pvmt	✓
Stop Fuel Or Truck	x

Traffic

Access to 3rd Street	✓
Motorway Proximity	<= 0.1 Miles
Primary St Barrier	None
Primary St Number of Thru Lanes	1
Primary St Traffic Count	7000
Primary Street Remote Access	x
Secondary St Barrier	Full Median
Secondary St Number of Thru	2
Secondary St Remote Access	x
Secondary St Traffic Count	23000

Fuel

Bypass Lanes	1
Petrol Street Signs	2
Diesel Brand Name	76
Petrol Brand Name	76
Petrol Blend	E10
Layout of Forecourt	Parallel
Diesel Offered	✓
Petrol Offered	✓

Pumps/Fueling Positions

Diesel Pumps	4
Diesel SFP	4
Fueling Position Penalty	x
MPD Pumps	✓
Petrol Attend Pumps	0
Petrol Attend SFP	0
Petrol Self-Service Pumps	4
Petrol Self-Service SFP	8
Pump Islands (info only)	4

Prices/Service/Hours

Attend Service	x
Average Discount	10
Company Cards	✓
Diesel Price	479.9
Diesel Price Posted	✓
Open Saturdays	✓
Open Sundays	✓
Opening Hours (Mon-Fri)	16
Petrol Attd Price	0
Petrol Attend Posted	x
Petrol Self-Service Posted	✓
Petrol Self-Service Price	489.9
Self Service	✓

Cstore

Cash Registers	2
Cooler Doors	27
Dedicated Park. Spaces	9
Hypermarket	x
Inside Appearance	Average
Shop Brand	Lindsay
Shop Building Size	3500
Shop Offered	✓
Shop Type	C-Store

Products

Bakery	✓
Cold Beer	✓
Deli	✓

Prices/Service/Hours

Open Saturdays	✓
Open Sundays	✓
Shop Opening Hours (Mon-Fri)	16

Carwash

Wash Offered	x
Wash Brand Name	N/A
Short Tunnel	x
Long Tunnel	x
In Bay/Whouse	x

Food

QSR Facility Type	Standard
QSR Brand Name	76
Number of parking spaces dedicated to QSR	9
Catering	✓

Other

Wash Distance to Nearest Competitor	0.1
Wash Competitors	1
Shop Competitors	6
QSR Distance to Nearest Competitor	0.57
Petrol Competitors	6
Number of QSR Competitors	4
Distance to Nearest Petrol Offer (Kms)	0.1
Distance to Nearest Diesel Offer (Kms)	0.1
Distance to Nearest C-Store Offer (Kms)	0.1
Diesel Competitors	4
Auto Repair Bays	0

Volumes

Diesel Volume	31
Petrol Volume	71
Shop Volume	84

Competitor photo and attributes



690 N Elmwood Ave / Tulare Rd, Lindsay



General		Location/Ratings		Traffic	
Site ID	40075	Bad Paint	x	Access to 3rd Street	x
Date Survey	11-18-21	Has Canopy	✓	Motorway Proximity	N/A
District	Lindsay	Hi Rise Sign	x	Primary St Barrier	None
Excess Trash	x	Hypermarket Type	Not a Hypermarket	Primary St Number of Thru Lanes	1
Local Number	5595622215	Landscaping	Minimal	Primary St Traffic Count	12000
Operation Type	Independent	Location Type	City Street	Primary Street Remote Access	x
Site Direction	SE	Lot Depth (m)	125	Secondary St Barrier	None
Site Location	Corner	Lot Front (m)	125	Secondary St Number of Thru	1
Site Name	Willies Gas Station	Low Small Sign	x	Secondary St Remote Access	x
		Oasis	x	Secondary St Traffic Count	3000
		Physical Damage	x		
		Stains/Bad Pvmt	✓		
		Stop Fuel Or Truck	x		
Location/Ratings					
Blockage	x				

Fuel		Prices/Service/Hours		Cstore		Carwash		Other	
Bypass Lanes	1	Attend Service	x	Cash Registers	1	Wash Offered	x	Wash Distance to Nearest Competitor	0.78
Petrol Street Signs	1	Average Discount	0	Cooler Doors	29	Wash Brand Name	N/A	Wash Competitors	1
Petrol Blend	E10	Company Cards	x	Dedicated Park. Spaces	12	Short Tunnel	x	Shop Competitors	10
Layout of Forecourt	Parallel	Diesel Price	439.9	Hypermarket	x	Long Tunnel	x	QSR Distance to Nearest Competitor	0.37
Diesel Brand Name	Willies	Diesel Price Posted	✓	Inside Appearance	Above Average	In Bay/Whouse	x	Petrol Competitors	10
Petrol Brand Name	Willies	Open Saturdays	✓	Shop Brand	Willies			Number of QSR Competitors	7
Diesel Offered	✓	Open Sundays	✓	Shop Building Size	3500			Distance to Nearest Petrol Offer (Kms)	0.37
Petrol Offered	✓	Opening Hours (Mon-Fri)	17	Shop Offered	✓			Distance to Nearest Diesel Offer (Kms)	0.37
		Petrol Attd Price	0	Shop Type	C-Store			Distance to Nearest C-Store Offer (Kms)	0.37
		Petrol Attend Posted	x					Diesel Competitors	6
		Petrol Self-Service Posted	✓					Auto Repair Bays	0
		Petrol Self-Service Price	459.9						
		Self Service	✓						
Pumps/Fueling Positions				Products					
Diesel Pumps	1			Bakery	x	QSR Facility Type	Standard		
Diesel SFP	2			Cold Beer	✓	QSR Brand Name	Willies		
Fueling Position Penalty	x			Deli	x	Number of parking spaces dedicated to QSR	12		
MPD Pumps	✓					Catering	✓		
Petrol Attend Pumps	0								
Petrol Attend SFP	0								
Petrol Self-Service Pumps	3								
Petrol Self-Service SFP	6								
Pump Islands (info only)	3								
				Prices/Service/Hours				Volumes	
				Open Saturdays	✓			Diesel Volume	6
				Open Sundays	✓			Petrol Volume	51
				Shop Opening Hours (Mon-Fri)	17			Shop Volume	84

Competitor photo and attributes



General

Site ID	40070
Date Survey	11-18-21
District	Lindsay
Excess Trash	x
Local Number	5595629872
Operation Type	Independent
Site Direction	SW
Site Location	T-Intersection
Site Name	A 1 Gas Station

Location/Ratings

Blockage	x
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Location/Ratings

Bad Paint	x
Has Canopy	✓
Hi Rise Sign	x
Hypermarket Type	Not a Hypermarket
Landscaping	Minimal
Location Type	City Street
Lot Depth (m)	125
Lot Front (m)	125
Low Small Sign	x
Oasis	x
Physical Damage	x
Stains/Bad Pvmt	x
Stop Fuel Or Truck	x

Traffic

Access to 3rd Street	x
Motorway Proximity	N/A
Primary St Barrier	None
Primary St Number of Thru Lanes	1
Primary St Traffic Count	13000
Primary Street Remote Access	x
Secondary St Barrier	None
Secondary St Number of Thru	1
Secondary St Remote Access	x
Secondary St Traffic Count	5000

Fuel

Bypass Lanes	0
Petrol Street Signs	1
Petrol Brand Name	A 1
Petrol Blend	E10
Layout of Forecourt	Linear
Diesel Brand Name	N/A
Diesel Offered	x
Petrol Offered	✓

Pumps/Fueling Positions

Diesel Pumps	0
Diesel SFP	0
Fueling Position Penalty	x
MPD Pumps	✓
Petrol Attend Pumps	0
Petrol Attend SFP	0
Petrol Self-Service Pumps	2
Petrol Self-Service SFP	4
Pump Islands (info only)	1

Prices/Service/Hours

Attend Service	x
Average Discount	0
Company Cards	x
Diesel Price	0
Diesel Price Posted	x
Open Saturdays	✓
Open Sundays	✓
Opening Hours (Mon-Fri)	17
Petrol Attd Price	0
Petrol Attend Posted	x
Petrol Self-Service Posted	✓
Petrol Self-Service Price	439.9
Self Service	✓

Cstore

Cash Registers	1
Cooler Doors	22
Dedicated Park. Spaces	7
Hypermarket	x
Inside Appearance	Below Average
Shop Brand	A 1
Shop Building Size	1900
Shop Offered	✓
Shop Type	C-Store

Products

Bakery	x
Cold Beer	✓
Deli	x

Prices/Service/Hours

Open Saturdays	✓
Open Sundays	✓
Shop Opening Hours (Mon-Fri)	17

Carwash

Wash Offered	x
Wash Brand Name	N/A
Short Tunnel	x
Long Tunnel	x
In Bay/Whouse	x

Food

QSR Facility Type	Standard
QSR Brand Name	A 1
Number of parking spaces dedicated to QSR	7
Catering	✓

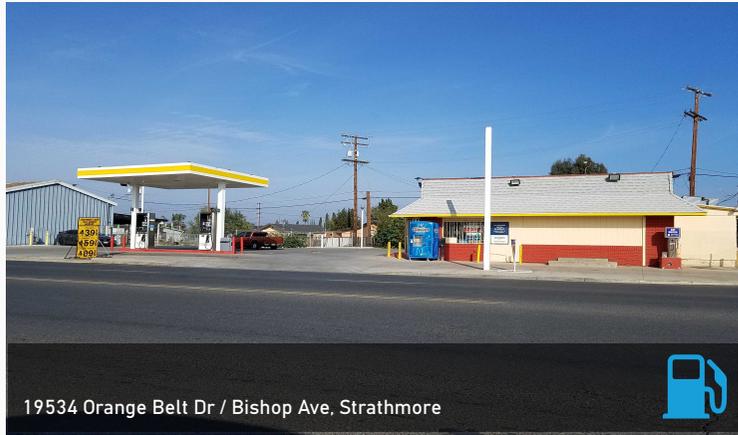
Other

Wash Distance to Nearest Competitor	0.47
Wash Competitors	1
Shop Competitors	9
QSR Distance to Nearest Competitor	0.47
Petrol Competitors	9
Number of QSR Competitors	7
Distance to Nearest Petrol Offer (Kms)	0.47
Distance to Nearest Diesel Offer (Kms)	0.47
Distance to Nearest C-Store Offer (Kms)	0.47
Diesel Competitors	6
Auto Repair Bays	0

Volumes

Petrol Volume	28
Shop Volume	42

Competitor photo and attributes



General

Site ID	40062
Date Survey	11-18-21
District	Strathmore
Excess Trash	x
Local Number	5595681641
Operation Type	Independent
Site Direction	NE
Site Location	T-Intersection
Site Name	Strathmore Gas Station

Location/Ratings

Blockage	x
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Location/Ratings

Bad Paint	x
Has Canopy	✓
Hi Rise Sign	x
Hypermarket Type	Not a Hypermarket
Landscaping	Minimal
Location Type	City Street
Lot Depth (m)	125
Lot Front (m)	125
Low Small Sign	x
Oasis	x
Physical Damage	x
Stains/Bad Pvmt	x
Stop Fuel Or Truck	x

Traffic

Access to 3rd Street	x
Motorway Proximity	N/A
Primary St Barrier	None
Primary St Number of Thru Lanes	1
Primary St Traffic Count	5000
Primary Street Remote Access	x
Secondary St Barrier	None
Secondary St Number of Thru	1
Secondary St Remote Access	x
Secondary St Traffic Count	1500

Fuel

Petrol Street Signs	0
Bypass Lanes	1
Petrol Blend	E10
Layout of Forecourt	Linear
Diesel Brand Name	N/A
Petrol Brand Name	Strathmore
Diesel Offered	x
Petrol Offered	✓

Pumps/Fueling Positions

Diesel Pumps	0
Diesel SFP	0
Fueling Position Penalty	x
MPD Pumps	✓
Petrol Attend Pumps	0
Petrol Attend SFP	0
Petrol Self-Service Pumps	2
Petrol Self-Service SFP	4
Pump Islands (info only)	1

Prices/Service/Hours

Attend Service	x
Average Discount	0
Company Cards	x
Diesel Price	0
Diesel Price Posted	x
Open Saturdays	✓
Open Sundays	✓
Opening Hours (Mon-Fri)	17
Petrol Attd Price	0
Petrol Attend Posted	x
Petrol Self-Service Posted	✓
Petrol Self-Service Price	439.9
Self Service	✓

Cstore

Cash Registers	1
Cooler Doors	20
Dedicated Park. Spaces	7
Hypermarket	x
Inside Appearance	Below Average
Shop Brand	Strathmore
Shop Building Size	1300
Shop Offered	✓
Shop Type	C-Store

Products

Bakery	✓
Cold Beer	✓
Deli	✓

Prices/Service/Hours

Open Saturdays	✓
Open Sundays	✓
Shop Opening Hours (Mon-Fri)	17

Carwash

Wash Offered	x
Wash Brand Name	N/A
Short Tunnel	x
Long Tunnel	x
In Bay/Whouse	x

Food

QSR Facility Type	Standard
QSR Brand Name	Strathmore
Number of parking spaces dedicated to QSR	7
Catering	✓

Other

Wash Distance to Nearest Competitor	4.78
Wash Competitors	0
Shop Competitors	1
QSR Distance to Nearest Competitor	0.13
Petrol Competitors	1
Number of QSR Competitors	1
Distance to Nearest Petrol Offer (Kms)	0.13
Distance to Nearest Diesel Offer (Kms)	3.95
Distance to Nearest C-Store Offer (Kms)	0.13
Diesel Competitors	0
Auto Repair Bays	0

Volumes

Petrol Volume	26
Shop Volume	44

Competitor photo and attributes



General

Site ID	40063
Date Survey	11-18-21
District	Strathmore
Excess Trash	x
Local Number	5595680066
Operation Type	Independent
Site Direction	SE
Site Location	Corner
Site Name	Handy Market Gas Station

Location/Ratings

Blockage	x
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Location/Ratings

Bad Paint	x
Has Canopy	x
Hi Rise Sign	x
Hypermarket Type	Not a Hypermarket
Landscaping	Minimal
Location Type	City Street
Lot Depth (m)	125
Lot Front (m)	125
Low Small Sign	x
Oasis	x
Physical Damage	x
Stains/Bad Pvmt	x
Stop Fuel Or Truck	x

Traffic

Access to 3rd Street	x
Motorway Proximity	N/A
Primary St Barrier	Full Median
Primary St Number of Thru Lanes	2
Primary St Traffic Count	4000
Primary Street Remote Access	x
Secondary St Barrier	None
Secondary St Number of Thru	1
Secondary St Remote Access	x
Secondary St Traffic Count	2000

Fuel

Bypass Lanes	1
Petrol Street Signs	1
Petrol Blend	E10
Petrol Brand Name	Handy Market
Layout of Forecourt	Linear
Diesel Brand Name	N/A
Diesel Offered	x
Petrol Offered	✓

Pumps/Fueling Positions

Diesel Pumps	0
Diesel SFP	0
Fueling Position Penalty	x
MPD Pumps	✓
Petrol Attend Pumps	0
Petrol Attend SFP	0
Petrol Self-Service Pumps	2
Petrol Self-Service SFP	4
Pump Islands (info only)	1

Prices/Service/Hours

Attend Service	x
Average Discount	10
Company Cards	x
Diesel Price	0
Diesel Price Posted	x
Open Saturdays	✓
Open Sundays	✓
Opening Hours (Mon-Fri)	17
Petrol Attd Price	0
Petrol Attend Posted	x
Petrol Self-Service Posted	✓
Petrol Self-Service Price	449.9
Self Service	✓

Cstore

Cash Registers	2
Cooler Doors	26
Dedicated Park. Spaces	11
Hypermarket	x
Inside Appearance	Average
Shop Brand	Handy Market
Shop Building Size	2600
Shop Offered	✓
Shop Type	C-Store

Products

Bakery	✓
Cold Beer	✓
Deli	x

Prices/Service/Hours

Open Saturdays	✓
Open Sundays	✓
Shop Opening Hours (Mon-Fri)	17

Carwash

Wash Offered	x
Wash Brand Name	N/A
Short Tunnel	x
Long Tunnel	x
In Bay/Whouse	x

Food

QSR Facility Type	Standard
QSR Brand Name	Handy Market

Number of parking spaces dedicated to QSR	11
Catering	✓

Other

Wash Distance to Nearest Competitor	4.79
Wash Competitors	0
Shop Competitors	1
QSR Distance to Nearest Competitor	0.13
Petrol Competitors	1
Number of QSR Competitors	1
Distance to Nearest Petrol Offer (Kms)	0.13
Distance to Nearest Diesel Offer (Kms)	3.94
Distance to Nearest C-Store Offer (Kms)	0.13
Diesel Competitors	0
Auto Repair Bays	0

Volumes

Petrol Volume	33
Shop Volume	61

Competitor photo and attributes



19590 Ave 196 / Rd 196, Strathmore

General

Site ID	12102
Date Survey	11-18-21
District	Strathmore
Excess Trash	x
Local Number	0
Operation Type	Independent
Site Direction	NW
Site Location	Corner
Site Name	Valley Fuel Gas Station

Location/Ratings

Blockage	x
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Location/Ratings

Bad Paint	x
Has Canopy	✓
Hi Rise Sign	x
Hypermarket Type	Not a Hypermarket
Landscaping	Minimal
Location Type	City Street
Lot Depth (m)	125
Lot Front (m)	125
Low Small Sign	x
Oasis	x
Physical Damage	x
Stains/Bad Pvmt	x
Stop Fuel Or Truck	x

Traffic

Access to 3rd Street	x
Motorway Proximity	N/A
Primary St Barrier	None
Primary St Number of Thru Lanes	5
Primary St Traffic Count	1000
Primary Street Remote Access	x
Secondary St Barrier	None
Secondary St Number of Thru	2
Secondary St Remote Access	x
Secondary St Traffic Count	4000

Fuel

Petrol Street Signs	1
Bypass Lanes	2
Petrol Blend	E10
Layout of Forecourt	Linear
Diesel Brand Name	Valley Fuel
Petrol Brand Name	Valley Fuel
Diesel Offered	✓
Petrol Offered	✓

Pumps/Fueling Positions

Diesel Pumps	1
Diesel SFP	2
Fueling Position Penalty	x
MPD Pumps	✓
Petrol Attend Pumps	0
Petrol Attend SFP	0
Petrol Self-Service Pumps	2
Petrol Self-Service SFP	4
Pump Islands (info only)	1

Prices/Service/Hours

Attend Service	x
Average Discount	0
Company Cards	x
Diesel Price	469.9
Diesel Price Posted	✓
Open Saturdays	✓
Open Sundays	✓
Opening Hours (Mon-Fri)	19
Petrol Attd Price	0
Petrol Attend Posted	x
Petrol Self-Service Posted	✓
Petrol Self-Service Price	449.9
Self Service	✓

Cstore

Cash Registers	2
Cooler Doors	23
Dedicated Park. Spaces	9
Hypermarket	x
Inside Appearance	Average
Shop Brand	Plainview Mk
Shop Building Size	2600
Shop Offered	✓
Shop Type	C-Store

Products

Bakery	✓
Cold Beer	✓
Deli	✓

Prices/Service/Hours

Open Saturdays	✓
Open Sundays	✓
Shop Opening Hours (Mon-Fri)	19

Carwash

Wash Offered	x
Wash Brand Name	N/A
Short Tunnel	x
Long Tunnel	x
In Bay/Whouse	x

Food

QSR Facility Type	Standard
QSR Brand Name	Plainview Mk

Number of parking spaces dedicated to QSR	9
Catering	✓

Other

Wash Distance to Nearest Competitor	4.38
Wash Competitors	0
Shop Competitors	1
QSR Distance to Nearest Competitor	0.52
Petrol Competitors	1
Number of QSR Competitors	1
Distance to Nearest Petrol Offer (Kms)	0.52
Distance to Nearest Diesel Offer (Kms)	0.52
Distance to Nearest C-Store Offer (Kms)	0.52
Diesel Competitors	1
Auto Repair Bays	0

Volumes

Diesel Volume	4
Petrol Volume	42
Shop Volume	66

Competitor photo and attributes



General

Site ID	12103
Date Survey	11-18-21
District	Strathmore
Excess Trash	x
Local Number	0
Operation Type	Independent
Site Direction	SW
Site Location	Corner
Site Name	Sinclair Gas Station

Location/Ratings

Blockage	x
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Location/Ratings

Bad Paint	x
Has Canopy	✓
Hi Rise Sign	x
Hypermarket Type	Not a Hypermarket
Landscaping	Minimal
Location Type	City Street
Lot Depth (m)	175
Lot Front (m)	125
Low Small Sign	x
Oasis	x
Physical Damage	x
Stains/Bad Pvmt	✓
Stop Fuel Or Truck	x

Traffic

Access to 3rd Street	x
Motorway Proximity	N/A
Primary St Barrier	None
Primary St Number of Thru Lanes	1
Primary St Traffic Count	4000
Primary Street Remote Access	x
Secondary St Barrier	None
Secondary St Number of Thru	1
Secondary St Remote Access	x
Secondary St Traffic Count	1000

Fuel

Bypass Lanes	1
Petrol Street Signs	1
Petrol Blend	E10
Layout of Forecourt	Linear
Diesel Brand Name	Sinclair
Petrol Brand Name	Sinclair
Diesel Offered	✓
Petrol Offered	✓

Pumps/Fueling Positions

Diesel Pumps	3
Diesel SFP	5
Fueling Position Penalty	x
MPD Pumps	✓
Petrol Attend Pumps	0
Petrol Attend SFP	0
Petrol Self-Service Pumps	2
Petrol Self-Service SFP	4
Pump Islands (info only)	1

Prices/Service/Hours

Attend Service	x
Average Discount	10
Company Cards	✓
Diesel Price	479.9
Diesel Price Posted	✓
Open Saturdays	✓
Open Sundays	✓
Opening Hours (Mon-Fri)	18
Petrol Attd Price	0
Petrol Attend Posted	x
Petrol Self-Service Posted	✓
Petrol Self-Service Price	469.9
Self Service	✓

Cstore

Cash Registers	2
Cooler Doors	27
Dedicated Park. Spaces	18
Hypermarket	x
Inside Appearance	Average
Shop Brand	Suhovy Liquo
Shop Building Size	3500
Shop Offered	✓
Shop Type	C-Store

Products

Bakery	✓
Cold Beer	✓
Deli	✓

Prices/Service/Hours

Open Saturdays	✓
Open Sundays	✓
Shop Opening Hours (Mon-Fri)	18

Carwash

Wash Offered	x
Wash Brand Name	N/A
Short Tunnel	x
Long Tunnel	x
In Bay/Whouse	x

Food

QSR Facility Type	Standard
QSR Brand Name	Sinclair
Number of parking spaces dedicated to QSR	18
Catering	✓

Other

Wash Distance to Nearest Competitor	4.87
Wash Competitors	0
Shop Competitors	1
QSR Distance to Nearest Competitor	0.52
Petrol Competitors	1
Number of QSR Competitors	1
Distance to Nearest Petrol Offer (Kms)	0.52
Distance to Nearest Diesel Offer (Kms)	0.52
Distance to Nearest C-Store Offer (Kms)	0.52
Diesel Competitors	1
Auto Repair Bays	0

Volumes

Diesel Volume	31
Petrol Volume	46
Shop Volume	84

Competitor photo and attributes



General

Site ID	12104
Date Survey	11-18-21
District	Porterville
Excess Trash	x
Local Number	0
Operation Type	Independent
Site Direction	NW
Site Location	At Location
Site Name	Shell Gas Station

Location/Ratings

Blockage	x
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Location/Ratings

Bad Paint	x
Has Canopy	✓
Hi Rise Sign	x
Hypermarket Type	Not a Hypermarket
Landscaping	Minimal
Location Type	Interstate
Lot Depth (m)	125
Lot Front (m)	175
Low Small Sign	x
Oasis	x
Physical Damage	x
Stains/Bad Pvmt	x
Stop Fuel Or Truck	x

Traffic

Access to 3rd Street	x
Motorway Proximity	<= 0.1 Miles
Primary St Barrier	Full Median
Primary St Number of Thru Lanes	2
Primary St Traffic Count	34000
Primary Street Remote Access	x
Secondary St Barrier	Full Median
Secondary St Number of Thru	2
Secondary St Remote Access	x
Secondary St Traffic Count	2000

Fuel

Bypass Lanes	1
Petrol Street Signs	1
Petrol Blend	E10
Diesel Brand Name	N/A
Layout of Forecourt	Parallel
Petrol Brand Name	Shell
Diesel Offered	x
Petrol Offered	✓

Pumps/Fueling Positions

Diesel Pumps	0
Diesel SFP	0
Fueling Position Penalty	x
MPD Pumps	✓
Petrol Attend Pumps	0
Petrol Attend SFP	0
Petrol Self-Service Pumps	4
Petrol Self-Service SFP	8
Pump Islands (info only)	2

Prices/Service/Hours

Attend Service	x
Average Discount	10
Company Cards	✓
Diesel Price	0
Diesel Price Posted	x
Open Saturdays	✓
Open Sundays	✓
Opening Hours (Mon-Fri)	24
Petrol Attd Price	0
Petrol Attend Posted	x
Petrol Self-Service Posted	✓
Petrol Self-Service Price	486.9
Self Service	✓

Cstore

Cash Registers	3
Cooler Doors	26
Dedicated Park. Spaces	10
Hypermarket	x
Inside Appearance	Above Average
Shop Brand	Shell
Shop Building Size	3500
Shop Offered	✓
Shop Type	C-Store

Products

Bakery	✓
Cold Beer	✓
Deli	x

Prices/Service/Hours

Open Saturdays	✓
Open Sundays	✓
Shop Opening Hours (Mon-Fri)	24

Carwash

Wash Offered	x
Wash Brand Name	N/A
Short Tunnel	x
Long Tunnel	x
In Bay/Whouse	x

Food

QSR Facility Type	Standard
QSR Brand Name	Port Of Subs

Number of parking spaces dedicated to QSR	10
Catering	✓

Other

Wash Distance to Nearest Competitor	9.23
Wash Competitors	0
Shop Competitors	2
QSR Distance to Nearest Competitor	4.54
Petrol Competitors	2
Number of QSR Competitors	0
Distance to Nearest Petrol Offer (Kms)	0.12
Distance to Nearest Diesel Offer (Kms)	0.12
Distance to Nearest C-Store Offer (Kms)	0.12
Diesel Competitors	1
Auto Repair Bays	0

Volumes

Petrol Volume	144
Shop Volume	131

Competitor photo and attributes



General

Site ID	12105
Date Survey	11-18-21
District	Porterville
Excess Trash	x
Local Number	0
Operation Type	Independent
Site Direction	SW
Site Location	Corner
Site Name	Chevron Gas Station

Location/Ratings

Blockage	x
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Location/Ratings

Bad Paint	x
Has Canopy	✓
Hi Rise Sign	x
Hypermarket Type	Not a Hypermarket
Landscaping	Minimal
Location Type	Interstate
Lot Depth (m)	125
Lot Front (m)	125
Low Small Sign	x
Oasis	x
Physical Damage	x
Stains/Bad Pvmt	x
Stop Fuel Or Truck	x

Traffic

Access to 3rd Street	x
Motorway Proximity	<= 0.1 Miles
Primary St Barrier	Full Median
Primary St Number of Thru Lanes	2
Primary St Traffic Count	16000
Primary Street Remote Access	x
Secondary St Barrier	None
Secondary St Number of Thru	1
Secondary St Remote Access	x
Secondary St Traffic Count	5000

Fuel

Petrol Street Signs	1
Bypass Lanes	3
Diesel Brand Name	Chevron
Petrol Brand Name	Chevron
Petrol Blend	E10
Layout of Forecourt	Parallel
Diesel Offered	✓
Petrol Offered	✓

Pumps/Fueling Positions

Diesel Pumps	2
Diesel SFP	4
Fueling Position Penalty	x
MPD Pumps	✓
Petrol Attend Pumps	0
Petrol Attend SFP	0
Petrol Self-Service Pumps	4
Petrol Self-Service SFP	8
Pump Islands (info only)	2

Prices/Service/Hours

Attend Service	x
Average Discount	0
Company Cards	✓
Diesel Price	525.9
Diesel Price Posted	✓
Open Saturdays	✓
Open Sundays	✓
Opening Hours (Mon-Fri)	17
Petrol Attd Price	0
Petrol Attend Posted	x
Petrol Self-Service Posted	✓
Petrol Self-Service Price	509.9
Self Service	✓

Cstore

Cash Registers	2
Cooler Doors	17
Dedicated Park. Spaces	12
Hypermarket	x
Inside Appearance	Average
Shop Brand	Extramile
Shop Building Size	2600
Shop Offered	✓
Shop Type	C-Store

Products

Bakery	x
Cold Beer	✓
Deli	x

Prices/Service/Hours

Open Saturdays	✓
Open Sundays	✓
Shop Opening Hours (Mon-Fri)	17

Carwash

Wash Offered	x
Wash Brand Name	N/A
Short Tunnel	x
Long Tunnel	x
In Bay/Whouse	x

Food

QSR Facility Type	N/A
QSR Brand Name	N/A
Number of parking spaces dedicated to QSR	0
Catering	x

Other

Wash Distance to Nearest Competitor	9.31
Wash Competitors	0
Shop Competitors	2
QSR Distance to Nearest Competitor	0.12
Petrol Competitors	2
Number of QSR Competitors	1
Distance to Nearest Petrol Offer (Kms)	0.03
Distance to Nearest Diesel Offer (Kms)	6.69
Distance to Nearest C-Store Offer (Kms)	0.03
Diesel Competitors	0
Auto Repair Bays	0

Volumes

Diesel Volume	9
Petrol Volume	117
Shop Volume	52

Competitor photo and attributes



770 N Porter Rd / S / W Henderson Ave, Porterville

General	
Site ID	12106
Date Survey	11-18-21
District	Porterville
Excess Trash	x
Local Number	0
Operation Type	Independent
Site Direction	E
Site Location	Inside
Site Name	Valero Gas Station

Location/Ratings	
Blockage	x

Location/Ratings	
Bad Paint	x
Has Canopy	✓
Hi Rise Sign	x
Hypermarket Type	Not a Hypermarket
Landscaping	Minimal
Location Type	Interstate
Lot Depth (m)	125
Lot Front (m)	125
Low Small Sign	x
Oasis	x
Physical Damage	x
Stains/Bad Pvmt	✓
Stop Fuel Or Truck	x

Traffic	
Access to 3rd Street	x
Motorway Proximity	> 0.1 - 0.2 Miles
Primary St Barrier	None
Primary St Number of Thru Lanes	1
Primary St Traffic Count	5000
Primary Street Remote Access	x
Secondary St Barrier	None
Secondary St Number of Thru	0
Secondary St Remote Access	x
Secondary St Traffic Count	0

Fuel

Bypass Lanes	1
Petrol Street Signs	1
Petrol Blend	E10
Diesel Brand Name	N/A
Layout of Forecourt	Parallel
Petrol Brand Name	Valero
Diesel Offered	x
Petrol Offered	✓

Pumps/Fueling Positions

Diesel Pumps	0
Diesel SFP	0
Fueling Position Penalty	x
MPD Pumps	✓
Petrol Attend Pumps	0
Petrol Attend SFP	0
Petrol Self-Service Pumps	4
Petrol Self-Service SFP	8
Pump Islands (info only)	2

Prices/Service/Hours

Attend Service	x
Average Discount	18
Company Cards	✓
Diesel Price	0
Diesel Price Posted	x
Open Saturdays	✓
Open Sundays	✓
Opening Hours (Mon-Fri)	17
Petrol Attd Price	0
Petrol Attend Posted	x
Petrol Self-Service Posted	✓
Petrol Self-Service Price	459.9
Self Service	✓

Cstore

Cash Registers	1
Cooler Doors	12
Dedicated Park. Spaces	3
Hypermarket	x
Inside Appearance	Below Average
Shop Brand	Valero
Shop Building Size	1300
Shop Offered	✓
Shop Type	C-Store

Products

Bakery	x
Cold Beer	✓
Deli	x

Prices/Service/Hours

Open Saturdays	✓
Open Sundays	✓
Shop Opening Hours (Mon-Fri)	17

Carwash

Wash Offered	x
Wash Brand Name	N/A
Short Tunnel	x
Long Tunnel	x
In Bay/Whouse	x

Food

QSR Facility Type	N/A
QSR Brand Name	N/A
Number of parking spaces dedicated to QSR	0
Catering	x

Other

Wash Distance to Nearest Competitor	9.34
Wash Competitors	0
Shop Competitors	2
QSR Distance to Nearest Competitor	0.15
Petrol Competitors	2
Number of QSR Competitors	1
Distance to Nearest Petrol Offer (Kms)	0.03
Distance to Nearest Diesel Offer (Kms)	0.03
Distance to Nearest C-Store Offer (Kms)	0.03
Diesel Competitors	1
Auto Repair Bays	0

Volumes

Petrol Volume	51
Shop Volume	47



Appendix

The 7 Elements for Fuel and Convenience Retail Success

The 7 Elements for Fuel and Convenience Retail Success are:



Location



Market



Brand



Facility



Merchandising



Price



Operations

Best-practice fuel retailers maximize performance by considering the role of each element in the daily tactics and strategic horizon of their sites. Optimizing the 7 Elements depends on a fuel retailer's specific business, but only an integrated focus ensures that every area of value is leveraged.

Six of the 7 Elements act as **"volume magnets"** to bring customers to site.

Location | Market | Brand | Facility | Merchandising | Operations

The remaining element, Price, provides the ability to make a decision. When you perform well in the volume magnet areas, you earn the right to make a decision on pricing. The 7 Elements framework informs all Kalibrate strategies and solutions. The practical application of this perspective is underpinned by extensive market data and sophisticated analytical models.



Location

Selection of fuel retail locations is a complex process with many variables to consider.

Site location must be understood relative to consumers and their habits — where they live, work, go to school, run errands, and play. Concepts such as critical mass, demand, natural barriers, and competitive environment are just a few of the characteristics that distinguish marginal from exceptional site selections. Fuel retailers adding new locations must also consider the impact on their existing network and current competitors. For example, a location that's great for one fuel retailer may be poor for another, because its cannibalization profile could be dramatically different.



Market

Every fuel retail site exists in the context of a broader competitive landscape.

Successful fuel retailers understand their competitors and have insight into how they might react to marketplace changes. They also know where their competitors are building, what they are building, how they operate, and how they price. Although hypermarkets have proven fierce competition to many, those who manage all 7 Elements are thriving even when competing with them.



Brand

Whether local hero or multinational giant, a company's ethos, quality, and consistency are reflected in its brand.

Retailers should understand the position of their brand relative to critical mass and saturation. Before a fuel retailer reaches critical mass, the network is vulnerable to competitive threats and acquisitions. Once critical mass is achieved, new sites added to the network will experience greater gains in market share than in outlet share. In other words, as new sites are added to the network, volume share increases at a greater rate than outlet share. On the other hand, once a brand moves beyond saturation, it risks cannibalizing other sites in its own network.

Facility

A facility must fulfill the needs and demands of customers. That goes well beyond considerations about the physical building.



Efficient flow through the purchase and shopping experience is crucial. For example, how easy is it to maneuver into the lot and around the property? Are there enough fueling positions to meet customer needs at peak times? Is parking space sufficient for the convenience store customer? What is the optimal number of cooler doors? Network consistency is also a factor, as it promotes familiarity with customers who like to know where to quickly pick up the products they need. Consistency is an often-overlooked challenge for fuel retailers with multiple channels of distribution.



Merchandising

Offering the right products and services, at the right time, at the right price, and with the right attitude, is the art and science of merchandising.

Success depends on the correct product and price mix, adequate inventory, fresh merchandise, and a clean, neat appearance. Retailers with best-in-class merchandising practices emphasize category killers. These low-priced, low-margin, popular items draw customers into the store, and the right merchandising strategy leads the consumer to make impulse, high-margin purchases.



Price

Thrift-conscious behavior has always existed, and now it's become standard for a small set of price-conscious customers to aggressively scout out the lowest priced sites.

As consumers, we all want to be sure that we're getting good value for our hard-earned dollar. But that doesn't translate into low pricing being the only tactic. Corporate strategies dictating pricing posture can be set to drive volume, profits, or a combination of the two. No matter what the strategy, the price must be perceived as competitive by customers.



Operations

Site-specific, personal, and intangible aspects of management and customer service should complement the investment at any given site.

Finally, it's important to note that even the best facility and location in the world will have difficulty maintaining volume with inadequate operations. Customers expect quick service, courteous employees, well-stocked shelves, well-functioning equipment, and fresh food offerings. The impact of employees can't be overestimated. Well-trained, quality people who are retained over time will contribute positively to the bottom line.