

Convenience Store Trends Report 2024

Powering the Next Era of Convenience Stores



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About the Report

This report aims to support convenience store operators in ***elevating their on-premise experiences***. We want to empower you with actionable insights and data so you can stay up to date with the latest trends and keep up with the competition. The convenience store market is anticipated to grow annually by 5.6% until 2028.¹ This growth is attributed to several factors, such as longer operating hours and strategic locations near high-traffic areas, which attract customers who require quick access to essential items.

This year, we aimed to address three primary questions: ***What motivates people to visit convenience stores, how can you encourage them to spend more time and how can you turn them into loyal customers?*** To answer these questions, we analyzed data collected through consumer perception surveys as well as mystery shops and audits performed across North America. This strategic approach has provided us with actionable insights into the current landscape and emerging trends, guiding store operators on how to adapt and thrive in this evolving market environment effectively.

Data Sources

Consumer surveys: For this report, we have included data from consumer perception surveys that provide insights into consumer preferences and their Impact on shopping decisions. Each survey received upwards of 1,200 responses from respondents across North America.

Mystery shopping and Operational audits: To understand how convenience store brands are performing, we have included data from recent mystery shopping and operational audit studies. In one study, our mystery shoppers and auditors performed 1,000 mystery shops and 1,000 audits at ten major brands across the USA, and in a second study, our shoppers performed 200 mystery shops at 49 brands across the USA.



Introduction: *Adapting for Tomorrow*

The landscape is changing. As we have reported in past years, the blurring lines between petro-convenience stores, restaurants, and other retailers continue to intensify, creating both increased competition and new opportunities for revenue streams for petro-convenience chains. One significant aspect of this shift is the dynamic landscape of transportation fuels. While gasoline remains the most purchased item in convenience stores, the evolution of the fuel market necessitates adaptation.

Is your brand ready to meet the needs of tomorrow's customers? A new generation of consumers is coming, and their habits and expectations are changing.

Key *Insights*

Here are the three things you need to know from this year's report to answer our main questions about consumer motivations around attracting and building loyalty with customers.

- Consumers are increasingly viewing convenience stores as a viable option for food over traditional fast-food restaurants. This trend is driven by improved food quality and variety. According to the report, 56% of respondents now consider convenience stores a viable alternative to fast-food chains, marking an increase of 11% over the past two years.
- The presence of EV charging stations at convenience stores is becoming a significant factor for younger consumers. Specifically, 34% of consumers aged 18-44 say they would choose a retail location over another if it had an EV charging station, compared to just 14% of those 45 years of age or older. It's important to note that the preference for EV charging stations can vary significantly based on geographic location and other local factors.
- Cleanliness and store ambiance have gained importance among consumers, with 53% considering cleanliness a crucial factor when choosing a convenience store, up from 43% last year. This increase of 10% highlights the growing expectation for a clean and pleasant shopping environment.

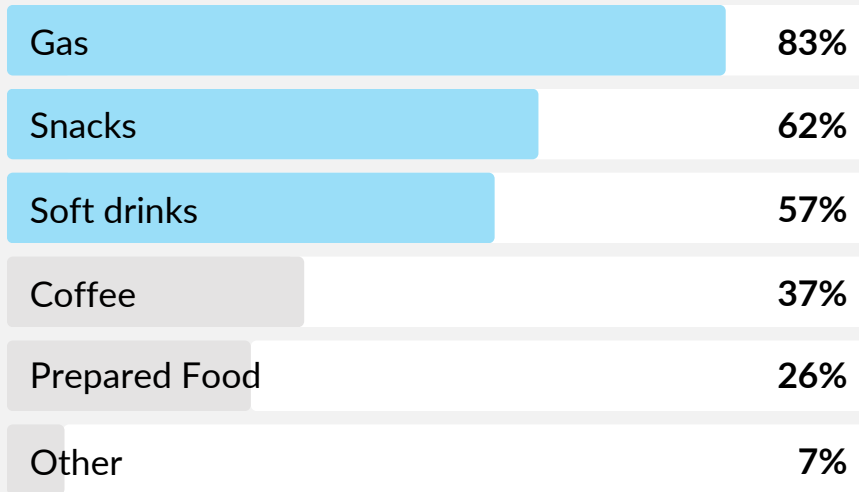
Let's dive into some of those key trends to see how brands can attract new customers and keep them coming back, starting with Fuel.



Charging Ahead: *Future Fuels*

Gasoline, not surprisingly, remains the predominant purchase at convenience stores, accounting for 62% of their overall sales.²

What items do you typically purchased from a convenience store?



2024, n=1204



However, a shift towards alternate fuels is coming. There are currently over 40 million EVs now registered globally— a more than sixfold increase since 2018.³ Not to mention the growth in hydrogen engines. Some automakers like Honda and Toyota have already started producing vehicles with these engines, suggesting that this new market could quickly gain traction.⁴

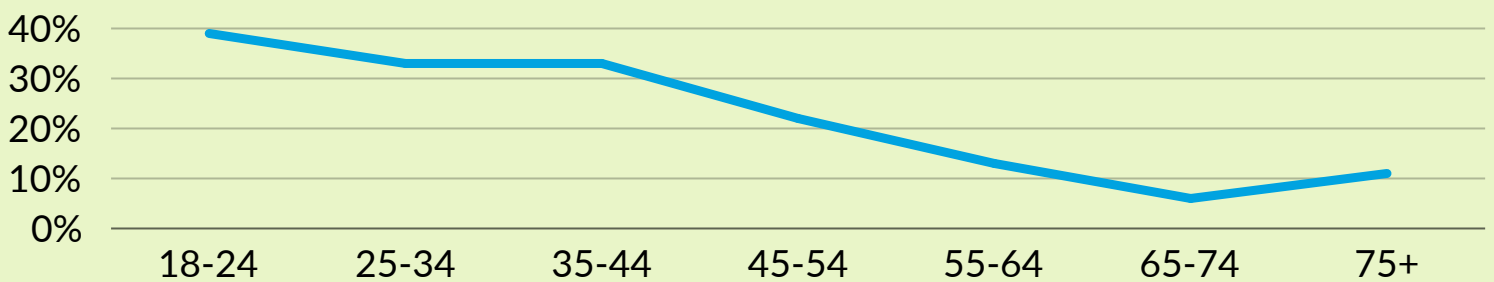
As the market adapts, convenience stores will find themselves increasingly competing in the fuel market not just with restaurants and other retailers who have been implementing EV charging technology, but also with other charging or fuel solutions entering the market.





To keep up with future demand, brands need to understand the shift in consumer preferences. To shed some light on the issue, we asked consumers if they would be **more likely to choose a retail location over another if it had an EV charging station**. While the majority said no, among those who said yes, we see a clear shift in preferences according to age. Over 40% of our Gen-Z respondents aged 18-24 said they would choose a location with EV charging stations, compared to just 6% for those aged between 65-74.

Percent of respondents reporting they would choose a retail location over another if it had an EV charging station, by age.



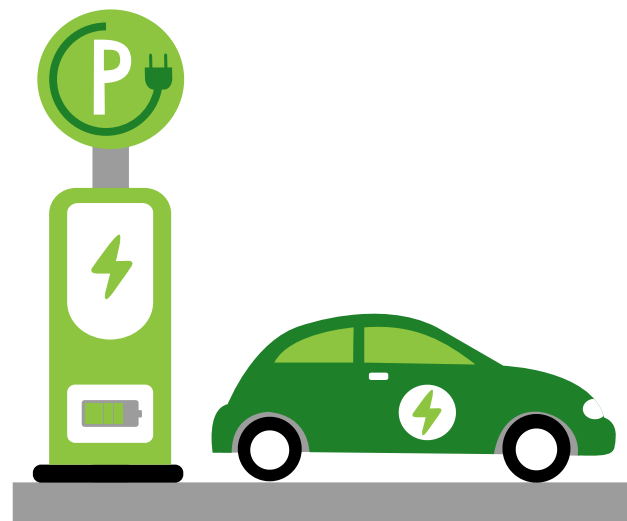
2024, n=1520

Operational Audit Insights

9%

of locations from the 10 brands in our study had EV charging stations. Despite varying consumer adoption, brands must stay mindful of shifting behaviors.

2024, n=1000



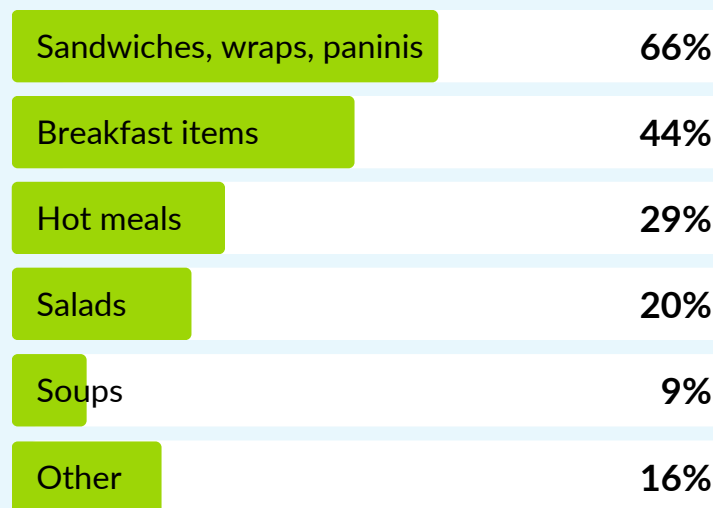
Fueling the Rise: Convenience Store *Food Trends*

As convenience store brands look to the future, new revenue streams are being explored, tested, and rolled out. One such example is the continued growth in food options. With **78% of our survey respondents reporting that they prefer to pay at the pump**, brands need to find ways to drive customers in-store, and one way to do this is by offering made-to-order food options and coffee.

According to our data, **93% of consumers have tried made-to-order food from convenience stores**, with sandwiches, wraps, and paninis being particularly popular. This is a significant increase from 2022 when only 76% of consumers reported purchasing made-to-order meals in a survey of 1,460 respondents.



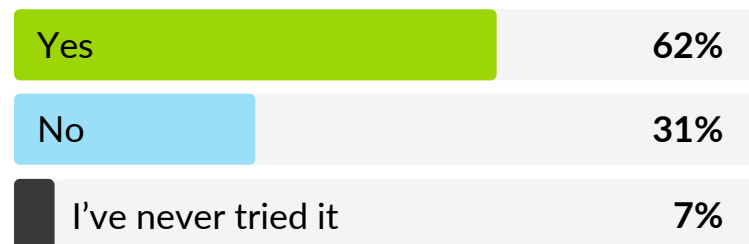
What types of made-to-order meals do you usually purchase from convenience stores?



2024, n=1592

With the growth in restaurant quality food options at convenience stores, the industry has moved way beyond roller grill hotdogs and coffee urns. More than half of the consumers we surveyed believe that the **made-to-order food being offered at convenience stores offers good value for their money**.

Do you feel that made to order food offered at convenience stores provides good value for money?

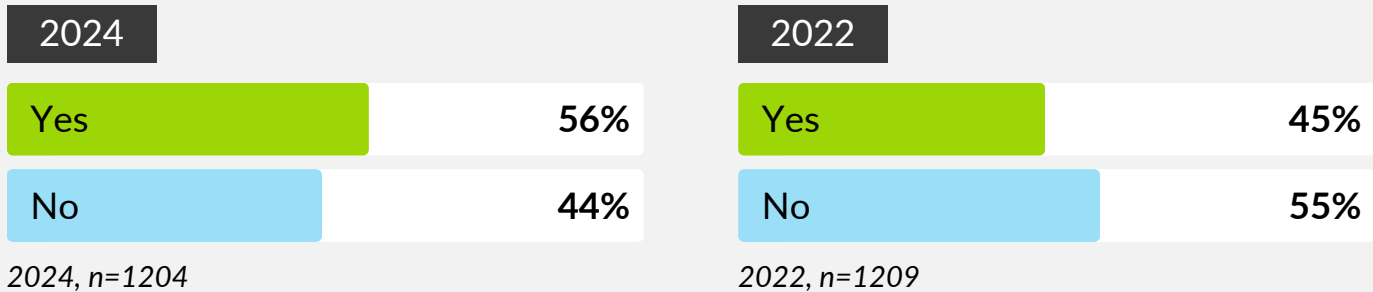


2024, n=1592



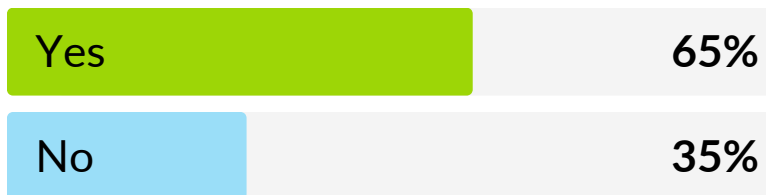
Additionally, 56% of people now consider convenience stores a viable alternative to quick-service restaurants, marking an 11% increase since we began tracking this two years ago.

With the evolution of improved food options at convenience stores, do you see convenience stores as an option for food over a quick service restaurant?



As convenience stores look to draw more customers in-store, one successful strategy has been enhancing their coffee offerings. With these improvements, convenience stores are becoming a popular alternative to traditional coffee shops, appealing to a growing number of consumers.

With the evolution of improved coffee options at convenience stores, do you see convenience stores as an option for coffee over a coffee shop?



2024, n=1204



Understand what *motivates!*

To continue capitalizing on the growth in food sales from convenience stores, brands need to understand what drives their customers' choices.



What motivates you to purchase made-to-order food from a convenience store?

Convenience	61%
Location of the store	8%
Promotions/Discounts	7%
Price	6%
Taste	6%
Variety	3%
Other	9%

2024, n=1592

When purchasing made-to-order food from a convenience store, where do you usually eat it?

	2023	2024
In car (while driving)	44%	49%
In car (while parked)	32%	22%
At destination	21%	18%
In-store	3%	5%
Other		7%

2024, n=1204 2023, n=678

Convenience remains the top motivator for purchasing made-to-order food from a convenience store. The majority of our respondents report eating their food in their vehicles, either while driving or parked. However, there is a slight increase in those choosing to eat in the store. Providing a comfortable space for quick dining, especially for customers waiting for their car to charge, can attract new customers and enhance their experience.



Unlocking Revenue: *The Rise of Retail Media*

Retail Media Networks (RMNs) are another potential new revenue source for petro-convenience chains that we have recently begun tracking. According to Convenience Store News, RMNs are expected to generate a predicted \$89 billion in revenue by 2026 through the sales of ad space to third-party brands. Traditionally, RMNs have been focused on digital advertising, but In-Store RMNs have seen a growth in popularity among C-store brands, with some chains, like Wawa, Casey's General Stores and 7-Eleven,⁵ launching branded platforms.

Our Audit shows that early adopters of digital advertising displays in C-stores make up **27% of visits**. Those with digital ads typically placed them on walls, at the pump, or near the cashier.



Mystery Shopping Insights

Digital ads were spotted in various locations, with **15% seen on in-store walls**, 11% at the pump, 8% at the cashier, 4% in other areas, and 3% on fridges.

2024, n=202

When asked whether digital advertising displayed inside or outside a convenience store impacts customers' shopping experience, **39% of consumers said they like seeing information on promotions or offers**, with 35% saying they have purchased an advertised product.

How does digital advertising displayed inside or outside a grocery or convenience store impact the shopping experience?

No impact: I don't pay attention to digital advertising **56%**

Enhances: I like seeing information on promos or offers **39%**

Detracts: I don't like seeing advertising or find it distracting **5%**

2024, n=1520





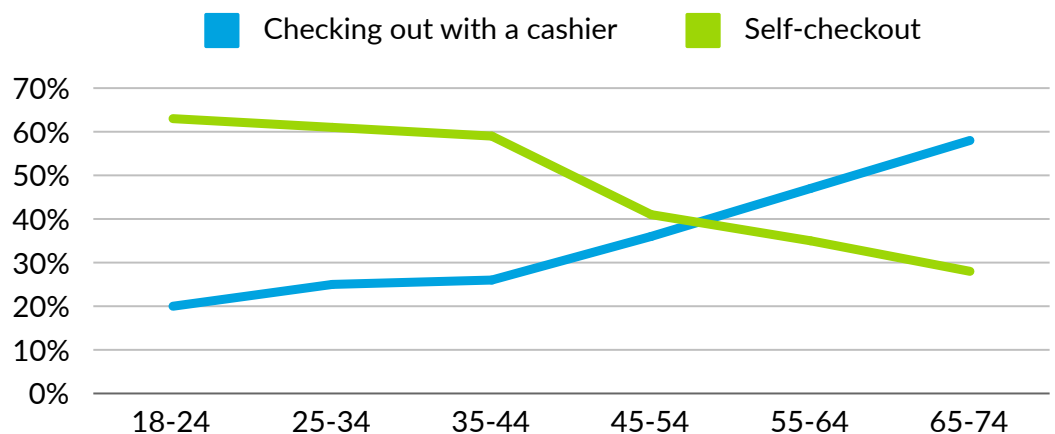
Leaning into Convenience: *Meeting Customer Needs*

Since 2022, retailers have been experimenting with various alternative, contactless options to serve their customers. And while adoption has remained steady - we saw just a 2% increase from 2023 to 2024 with **16% of our respondents reporting that they have used an alternative shopping method with a convenience store**, demographics are a factor to consider.

46%

of North American customers prefer self-checkout for its speed, employee interaction avoidance, and the ability to pack their own bags.

Preference for Checkout at Self-Checkout vs Cashier by Age



Why do you prefer checking out with a cashier?

Enjoy employee interaction	55%
Bags get packed for me	42%
Quicker	33%
Other	11%

2024, n=559

Why do you prefer self-checkout?

Quicker	85%
Avoids interaction with employees	44%
Get to pack my own bags	35%
Other	2%

2024, n=704

Self checkouts - *Adoption*

7 out of 10 brands that we visited had self-checkouts in over 50% of the locations visited.



Operational Audit Insights	
Availability of self-checkouts at locations visited	# Brands
80% of locations or more had self-checkouts	4
50%-79% of locations had self-checkouts	3
20%-49% of locations had self-checkouts	2
19% or less of locations had self-checkouts	1

Another contactless option being offered by brands is curbside pickup. Data shows that in 2022 *two thirds of millennial consumers* in the United States *choose curbside pickup when they shop online*.⁶ Here's a closer look at the specific alternative shopping methods that have gained traction among consumers.

What alternative shopping methods have you used when making a purchase at a convenience store?

	2023	2024
Delivery through a third-party app	57%	56%
Curbside pickup	37%	45%
Pickup through store app-website	36%	33%
Delivery through store-app website	28%	25%
Pickup through a third-party app	17%	14%
Other		3%

2024, n=200 2023, n=202

Operational Audit Insights

33%

of convenience stores now offer curbside pickup, a 5% increase from last year. Our auditors also reported a significant rise in dedicated parking spots, with 41% of visits having them compared to 21% last year.

2024, n=1000

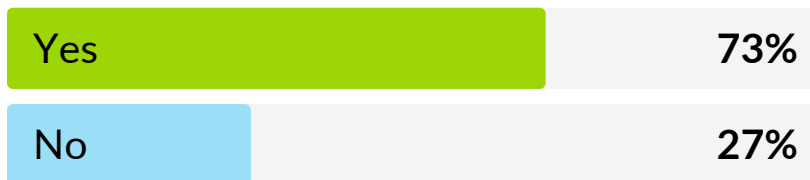




Elevating Convenience: *Tech, Personalization, and Loyalty*

Bringing new streams of income and standing out from the competitors is essential. Still, operators also have to find a way *not just to attract new customers but turn them into loyal brand advocates who will come back*. Hand in hand with convenience and speed, mobile apps offer a direct connection to your customers. Considering that Americans spend, on average, more than four hours a day on their phones, enhancing your mobile offerings can provide significant advantages.⁷

Are you a member of any retail loyalty programs?



2024, n=1520

Are you more likely to choose a brand over its competition if they have a loyalty program?



2024, n=1520

By addressing the evolving expectations of different age groups and investing in mobile solutions, brands can create seamless, engaging, and efficient shopping experiences that keep customers coming back. Embracing these strategies will ensure convenience stores meet and exceed consumer expectations, solidifying their position in a competitive market.

Operational Audit Insights

92%

of visits performed were reported to had a loyalty program

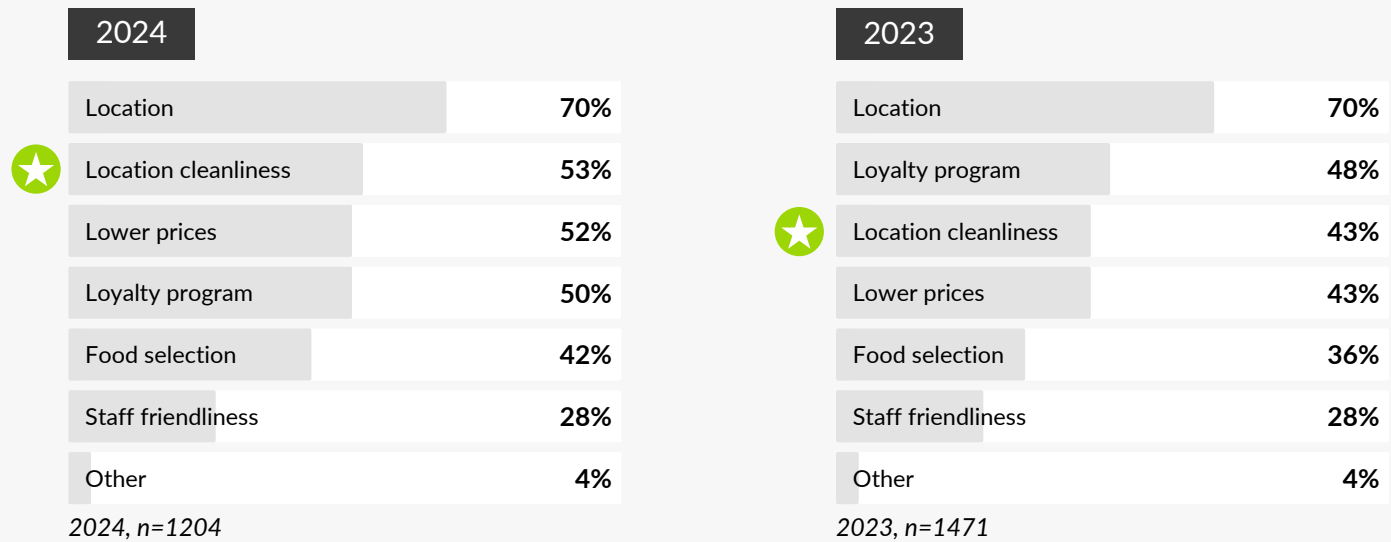
2024, n=1000



Enhancing Convenience: Prioritizing *Cleanliness* and *Store Appearance*

To enhance customer experience, operators should prioritize store cleanliness alongside loyalty programs. This year, 53% of consumers consider cleanliness as the second most important factor in choosing a convenience store, up from 43% last year.

What are the top reasons you choose one convenience store over another?
Check all that apply.



48%

of fast-food consumers stated in a recent survey that they would avoid a restaurant if its parking lot had dim lighting.

Overall, the enhancements to customer loyalty programs and the stores' physical environment are essential to retaining customers. With the majority of consumers now valuing cleanliness, combined with lessons learned from a recent fast-food customer survey, convenience stores are well-positioned to foster loyalty and encourage repeat visits. These efforts collectively contribute to a superior shopping experience that differentiates a store in a competitive market.

Closing Remarks

It's clear that the landscape for convenience stores is rapidly evolving. Our findings highlight the critical importance of adapting to new consumer behaviors and technological advancements to stay competitive. Especially considering the reported differences with the younger generation. By investing in mobile technology, enhancing store aesthetics, and embracing sustainable practices like EV charging stations, convenience stores can effectively meet the shifting demands of today's consumers.

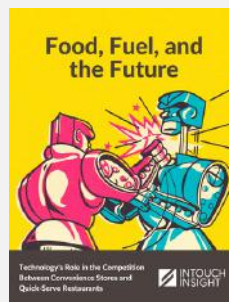
Additionally, the integration of made-to-order food options and effective loyalty programs proves essential in driving both traffic and revenue, positioning convenience stores not just as quick stops but as essential parts of daily life. We encourage store operators to leverage these insights to refine their strategies and operations, ensuring they not only meet but exceed customer expectations in this dynamic retail environment.

As we look forward to the future, Intouch Insight remains committed to providing the tools and insights necessary for our clients to thrive. By continuing to innovate and adapt, convenience stores can look forward to not just surviving but thriving in the face of change.

Missed *last year's report?*

Download the 2023 Convenience Store Trends Report to gain a deeper understanding of the ongoing trends and changes.

[Download here](#)



About *Intouch Insight*

At Intouch Insight, we specialize in helping multi-location brands achieve operational excellence, exceed customer expectations, and build long-term customer loyalty. As a North American company, we are proud to deliver growth solutions to over 300 of the continent's most beloved brand.

Our solutions are designed to streamline operations, maintain brand standards, and provide actionable insights to help our clients enhance their CX. With over 40 years of CX expertise, we excel in providing our clients with top-notch CX, customer surveys, mobile forms, mystery shopping, as well as operational and compliance audit solutions.

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