

CONVENIENCE STORE FOODSERVICE – US – 2024

Strengthening breakfast and snack offerings at c-stores can transform consumer perceptions of foodservice quality, helping establish parity with QSRs.



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Convenience Store Foodservice - US - 2024

This report looks at the following areas:

- C-store visitation trends
- Consumer perception of c-store foodservice
- Consumer engagement with c-store foodservice
- Relevant dining occasions
- Consumer attitudes on c-store foodservice vs restaurants

Overview

Consumers associate convenience stores with travel and quick occasions, often purchasing pre-packaged goods and self-serve drinks, which limits their exposure to the stores' broader foodservice offerings. Their perception of c-store foodservice needs a boost: **69% feel that the food at convenience stores cannot match restaurants in quality.**

Fortunately, there are some pockets where c-stores can differentiate and win: **64% agree that coffee from c-stores is just as good as that from cafes.** C-stores have an opportunity to build favorable associations through breakfast and snack occasions, delivering on both the convenience consumers seek when purchasing on-the-go, and the indulgence they crave when wanting to treat themselves.

Consumers are fatigued by rising costs of food both at home and away from home, yet their resilience is evident in increased c-store visitation in 2023. Consistently delivering on quality, convenience and value will not only position c-stores as an ideal alternative to QSR dining,



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but also build purchase habits at scale, inviting customer loyalty that can be further bolstered through app-based loyalty programs.

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Report Content

Key issues covered in this Report

- Overview

EXECUTIVE SUMMARY

- What you need to know
- Consumer trends: key takeaways
- Market predictions
- Opportunities

CONSUMER INSIGHTS

Consumer fast facts

Store visitation and shopping frequency

- Convenience store visitation up from 2023
 - Graph 1: convenience store visitation, 2022-23
- Reward frequent shoppers for their loyalty
 - Graph 2: convenience store shopping frequency, 2023

Frequent c-store foodservice shoppers: a closer look

- Frequent shoppers skew male
 - Graph 3: convenience store shopping frequency, by gender, 2023
- Hybrid lifestyles increase the demand for convenience
 - Graph 4: convenience store shopping frequency, by work from home status, 2023
- Choice variety matters to Millennials, Gen Zs
 - Graph 5: convenience store shopping frequency, by generation, 2023
- For frequent shoppers, c-stores are more than just a pit stop
 - Graph 6: c-store foodservice purchase occasions, by purchase frequency, 2023
- Poor foodservice perception may be a trial problem
 - Graph 7: c-store foodservice associations, by purchase frequency, 2023

Convenience store foodservice: usage and interest

- Match the strengths consumers seek in packaged items
 - Graph 8: usage of and interest in c-store items, 2023
- Interest in personalization will boost c-store beverage trial

- Graph 9: usage of and interest in c-store items – Net, 2023

Purchase occasions

- Treats and travel go together
 - Graph 10: c-store foodservice purchase occasions, 2023
- Snack options will invite impulse buys from women
 - Graph 11: c-store foodservice purchase occasions, by gender, 2023
- For parents, convenience takes priority regardless of daypart
 - Graph 12: c-store foodservice purchase occasions, by parental status, 2023
- Meeting younger consumers' needs will elevate the c-store experience for all
 - Graph 13: c-store foodservice purchase occasions, by generation, 2023
- On-the-go meals don't have to be a compromise
 - Graph 14: interest in c-store food purchase occasions from non-shoppers, 2023

Convenience store foodservice perception

- Incentivize consumers to look beyond their usual c-store purchases
- Incentivize consumers to look beyond their usual c-store purchases
 - Graph 15: c-store foodservice associations, 2023
- A focus on accessible healthy options will boost engagement from parents
 - Graph 16: c-store foodservice associations, by parental status, 2023

Attitudes

- Consistent improvement and engagement can turn foodservice perception around
- Consistent improvement and engagement can turn foodservice perception around
 - Graph 17: c-store foodservice attitudes, 2023
- Challenge misguided c-store perceptions with loyalty apps
 - Graph 18: c-store foodservice attitudes, 2023
- Affordable novelty will resonate with Millennials, Gen Zs
 - Graph 19: c-store foodservice attitudes, 2023
- Consumers haven't yet experienced the potential of c-store foodservice
 - Graph 20: c-store foodservice attitudes, by region, 2023

COMPETITIVE STRATEGIES

Marketing and advertising

- At Buc-ee's, award-winning amenities invite trust in foodservice
- Trending on TikTok: Convenience-store dinners

Menu activity and innovation

- Seasonal and unique items make for noteworthy c-store LTOs
- Sweet and spicy items add novelty to c-store menus
- Cult-favorite menu items boost traffic at c-stores

Opportunities

- Wawa and the potential for c-store corporate catering
- Prepare to adopt newer technologies at c-stores

THE MARKET

Market context

Market drivers

- CPI to normalize in 2024
 - Graph 21: Consumer Price Index change from previous period, 2022-23
- Consolidation continues in the c-store space

Market size and forecast

- Investment in the customer experience propels growth in c-store foodservice
- Total US sales and forecast of convenience-store foodservice
- Total US sales and forecast of convenience-store foodservice

Market segmentation

- Prepared foods to drive c-store foodservice growth
- Convenience store sales and forecast of prepared food
- Convenience store sales and forecast of prepared foods
- Convenience store sales and forecast of hot dispensed beverages
- Convenience store sales and forecast of hot dispensed beverages
- Convenience store sales and forecast of cold dispensed beverages
- Convenience store sales and forecast of Cold dispensed beverages
- Convenience store sales and forecast of Frozen dispensed beverages
- Convenience store sales and forecast of Frozen dispensed beverages

APPENDIX

- Market definition
- Consumer research methodology
- Generations
- Abbreviations and terms

- Forecast
- Forecast fan chart
- Market forecast table: total market (inflation-adjusted)
- Market forecast table: prepared food (inflation-adjusted)
- Market forecast table: hot dispensed beverages (inflation-adjusted)
- Market forecast table: cold dispensed beverages (inflation-adjusted)
- Market forecast table: frozen dispensed beverages (inflation-adjusted)

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