



Built for Speed. Fueled by Change.

Convenience Store Trends Report 2025



Table of Contents

About the Report	01	Rethinking the Store Itself <i>More Tech, More Expectations</i>	17
Introduction <i>What Got Us Here Won't Get Us There</i>	02	Your Store, Your Standard <i>Clean Floors, Bigger Scores</i>	23
Craveable Convenience <i>Food That Drives Foot Traffic</i>	05	Closing Thoughts <i>Where Convenience Goes from Here</i>	26
C-Stores vs. QSRs <i>Closing the Gap with Value</i>	10	About Intouch Insight	27
An Allegiance to Convenience <i>Building Loyalty</i>	13		

About the Report

The Convenience Store Trends Report gives you a front-row seat to the evolution happening in convenience retail. It's fast. It's fluid. And it's leaving the old gas-gum-and-go model in the dust.

We're here for the convenience store operators who are always looking to raise the bar, stand out, and serve better. This report is built to empower you with fresh insights on exceeding customer expectations in 2025 and beyond.

- **Made-to-order food** remains a major topic in the industry.
- **Perceived value** has shifted from a bonus to a dealbreaker for customers.
- **Quick Service Restaurants (QSRs)** are paying close attention to evolving trends.
- **Convenience stores (C-stores)** are gaining popularity by:
 - Offering crave-worthy, made-to-order food
 - Gamifying loyalty programs to boost engagement
 - Turning pump-side screens into revenue-generating ad platforms



Straight from the Source

Consumer surveys: This report draws on 2025 consumer surveys focused on technology, made-to-order food, and value meals. The insights reflect shifting expectations around convenience, food quality, and the in-store experience across North America.

Mystery shopping and Operational audits: This report includes findings from two studies, one covering ten major U.S. convenience store brands and another spanning 32 additional brands. Mystery shopping and audit insights provide a performance snapshot of service and operational execution across a wide range of store formats.



Introduction

What Got Us Here

Won't Get Us There

Introduction: *What Got Us Here Won't Get Us There*

Somewhere between the roller grill and the espresso machine, convenience stores unlocked something big. C-stores are now crafting crave-worthy meals, building digital loyalty ecosystems, remodeling interiors, and serving quality coffee that rivals the people with the green aprons. And customers are responding.

In 2024, in-store sales hit a record \$335.5 billion,¹ and by 2028, the industry is projected to generate a massive \$3.12 trillion.²

Customers are showing up, spending more, and shifting loyalty because of the new value they're finding in convenience stores.

Many of the same tactics once reserved for top QSRs like mobile ordering, limited-time offers, bundle deals, and personalized rewards are now being reimaged by convenience retailers. The result is a category that is no longer playing catch-up. It is setting the pace.

Key Insights

Here are three areas where convenience stores are building momentum and meeting evolving customer expectations.

- ➔ **Made-to-order food is reshaping expectations** – 85% of US consumers have tried made-to-order food from a c-store, and it's quickly becoming a main attraction, only second to gas. Fresh, customizable meals are pulling customers in as C-store foodservice grew 5% in 2024 and is on track to rise another 5.7% in 2025.³
- ➔ **Value is the battleground** – 72% of consumers now see c-stores as a real alternative to QSRs, up from 56% last year. Price still matters, but so do portion size, taste, and the feeling that you're getting a deal. The brands winning this space are turning combo meals into customer magnets.
- ➔ **Loyalty programs are becoming strategic engines** – Loyalty platforms are leveling up. Gamified challenges, fuel rewards, and personalized offers are driving engagement. With 72% enrolled—and 85% more likely to join if rewards match their habits—the best programs feel like experiences, boosting visits and brand connection.

¹ https://www.cspdailynews.com/company-news/foodservice-drives-sales-us-convenience-stores-2024?utm_source=chatgpt.com

² <https://www.paytronix.com/blog/convenience-store-industry-trends>

³ <https://www.cspdailynews.com/foodservice/inside-convenience-store-playbook-beat-qsr>

The Pull of the Pump, the Promise of the Plug

Electric is rising, but fuel still rules... for now. In fact, 80% of all fuel purchased in the U.S. is sold through convenience stores.¹

EV adoption in the U.S. continues to climb despite policy changes. Even after the Trump administration paused the \$5B NEVI charging program in February 2025,² demand held steady as EV sales rose 15.2% at the end of 2024,³ and grew another 11.4% in early 2025.⁴

The plug-in future offers a big opportunity for convenience stores. With dwell times of 30–60 minutes, EV drivers often shop, eat, or browse while they charge, making c-stores well-positioned to turn wait time into wallet time.⁵

Operational Audit Insights

9% of locations from the 10 brands in our study had EV charging stations—a number that's shown minimal variability over the past four years. Despite varying consumer adoption, brands must stay mindful of shifting behaviors.

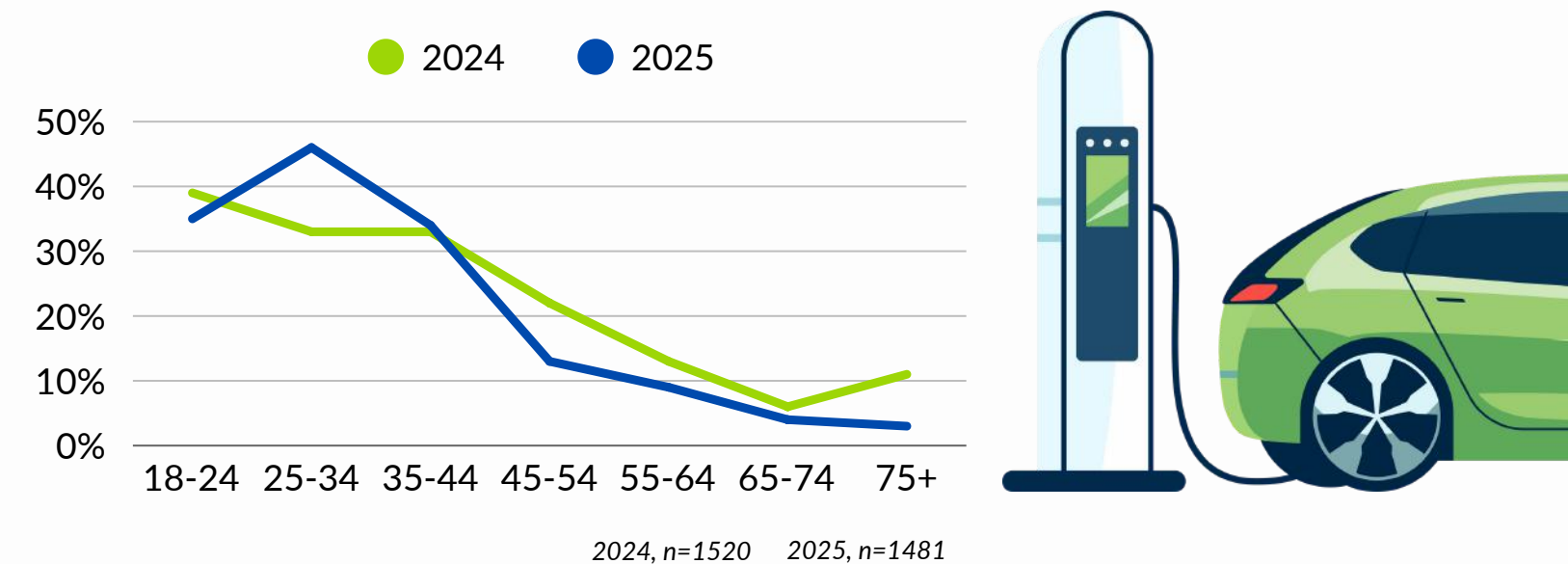
2025. n=1000



Demographic Impacts

Our report found that **20%** of consumers are more likely to visit a location solely because of EV charging. Of that group, **45%** are Millennials aged 25-34, now surpassing Gen Z who topped this category of interest in last year's report. The trend shows a steady decrease in interest towards EV charging for all ages above 44 years. It goes to show that EV may be continuing to gain traction with younger demographics while losing even more steam with older consumers.

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



¹ https://www.convenience.org/Research/Convenience-Store-Fast-Facts-and-Stats/FactSheets/FuelSales?utm_source=chatgpt.com

² <https://www.utilitydive.com/news/dot-suspends-ev-electric-vehicle-charging-network/739521/>

³ <https://www.coxautoinc.com/market-insights/q4-2024-ev-sales/>

⁴ <https://www.coxautoinc.com/market-insights/q1-2025-ev-sales/>

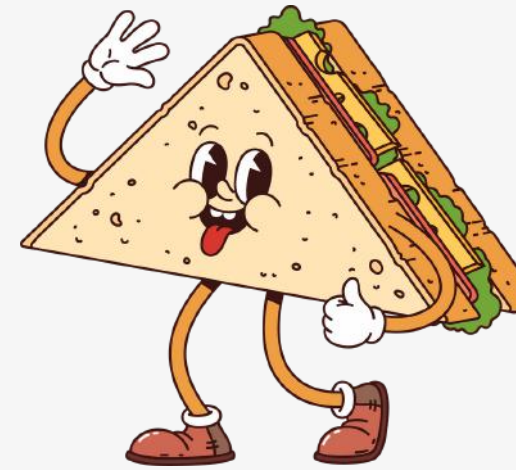
⁵ https://www.transportationenergy.org/wp-content/uploads/2022/11/21FI-EVC_ConsumerBehaviorReport_V07-FINAL.pdf



Craveable
Convenience
*Food That Drives
Foot Traffic*

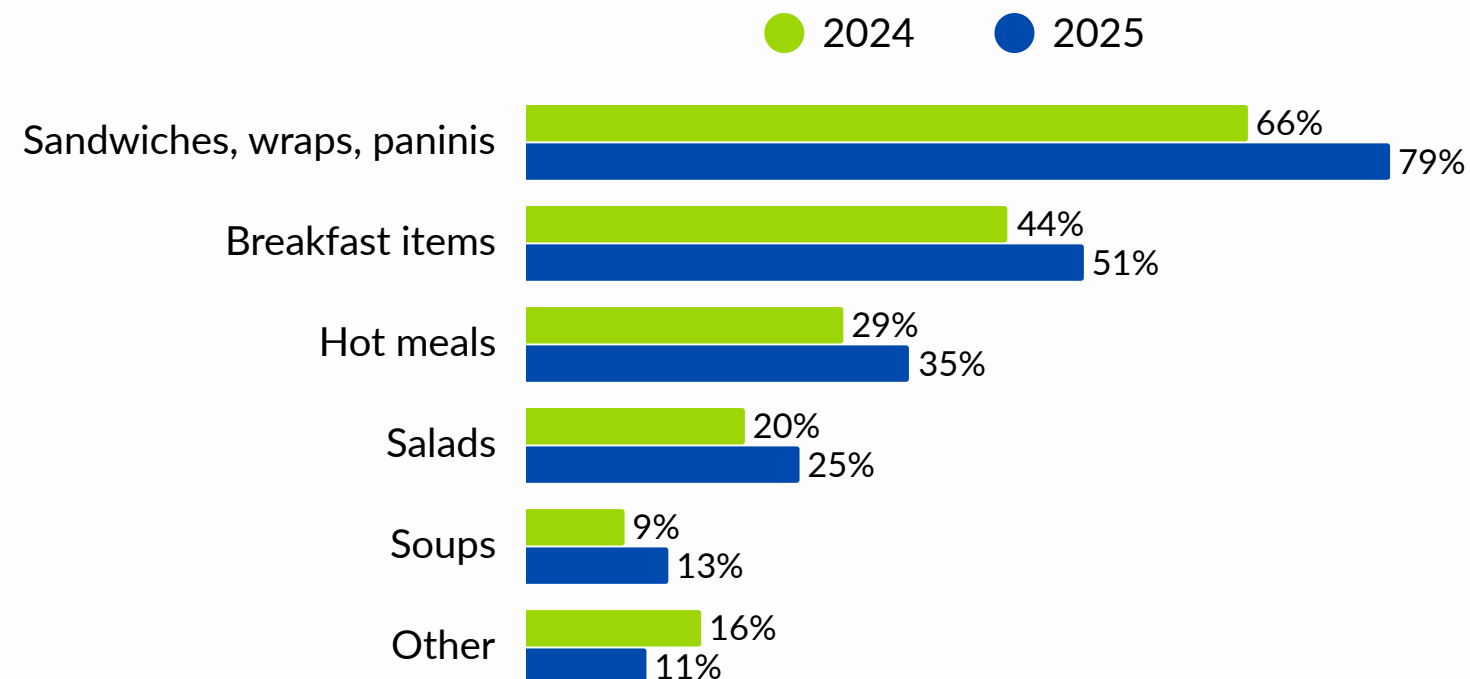
Craveable Convenience: *Food That Drives Foot Traffic*

Once a pit stop for chips and soda, the convenience store is fast becoming a full-fledged food destination. C-store foodservice grew 5% in 2024 and is projected to climb another 5.7% in 2025.¹



With nearly 85% of our respondents reporting that they've tried made-to-order (MTO) food from a convenience store, it's clear that foodservice is becoming a key differentiator.

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



2024, n=1592 2025, n=1705

Sandwiches and wraps still lead the pack in popularity, but the real plot twist? The steady rise of hot meals and salads. **Our survey data shows that hot meal purchases rose from 29% in 2024 to 35% in 2025, while salads climbed from 20% to 25% over the same period.**

That kind of growth doesn't happen by accident. It shows that more customers are shifting from simple snacks to full-on meals and better-for-you options in a space they once overlooked.

¹ <https://www.cspdailynews.com/foodservice/inside-convenience-store-playbook-beat-qsr/>

Food Freshness Insights

43%

of consumers say c-store food is just as fresh as grocery or fast food, and 11% say it's even fresher.

2025, n=1252

In 2024, Buc-ee's, Sheetz, and Wawa outpaced the rest of the c-store and gas station category in foot traffic from 7 a.m. to noon, according to Placer.ai.¹ Buc-ee's leads with massive stores and a full-scale hot food program featuring fan favorite items like brisket sandwiches that have developed a cult following.² Wawa keeps pace with an enormous made-to-order menu, where every item is prepared by hand with fast turnaround times.³

Median dwell times back it up. Buc-ee's sees 20.3 minutes per visit, with Sheetz and Wawa at 11.5 and 11.4 minutes, far beyond the 8-9 minute gas station average.¹

¹ <https://www.cspdailynews.com/foodservice/convenience-stores-invest-food-see-more-foot-traffic>

² <https://www.cnn.com/2023/10/01/travel/bucees-gas-station-convenience-popularity-cec/index.html>

³ <https://www.forbes.com/sites/gregpetro/2024/11/18/how-wawa-became-americas-best-loved-convenience-store-and-a-retail-phenomenon/>

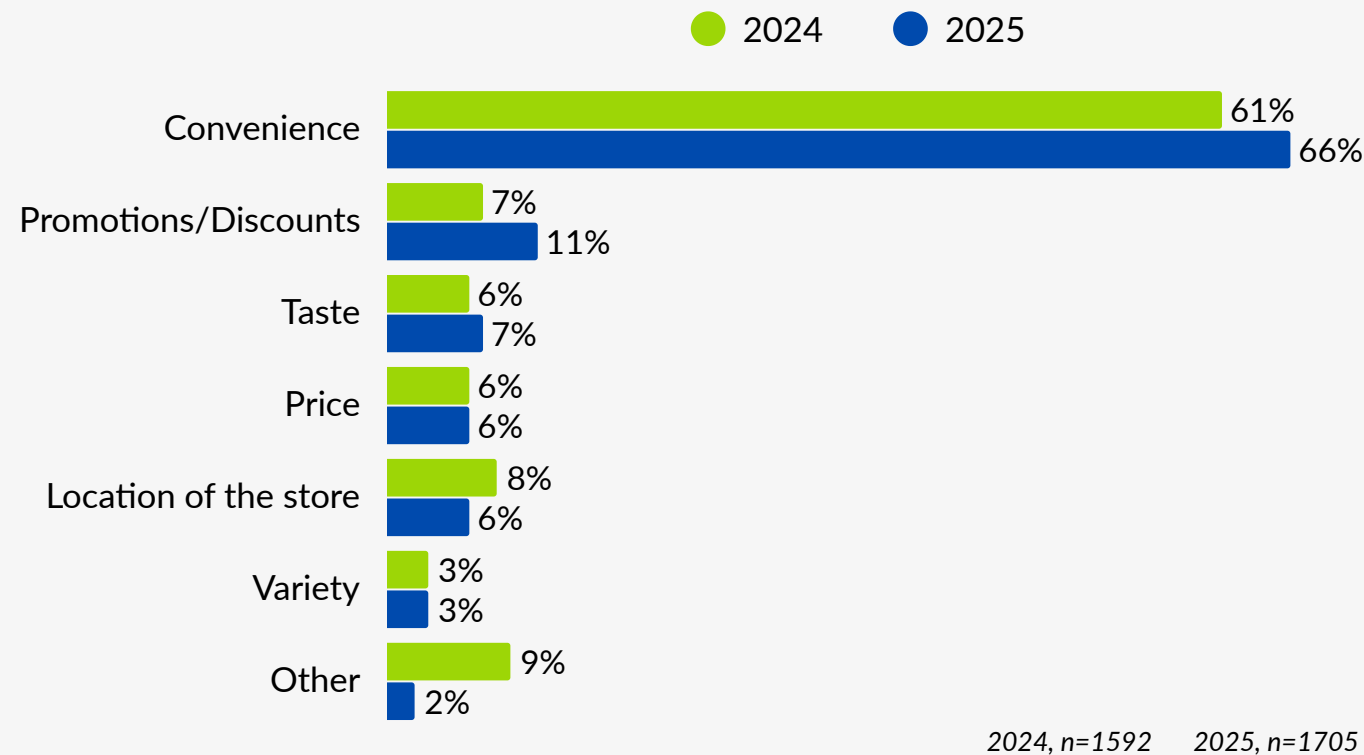


What Sparks the Order and Shapes the Experience

So what's actually motivating people to make these food purchases in the first place?

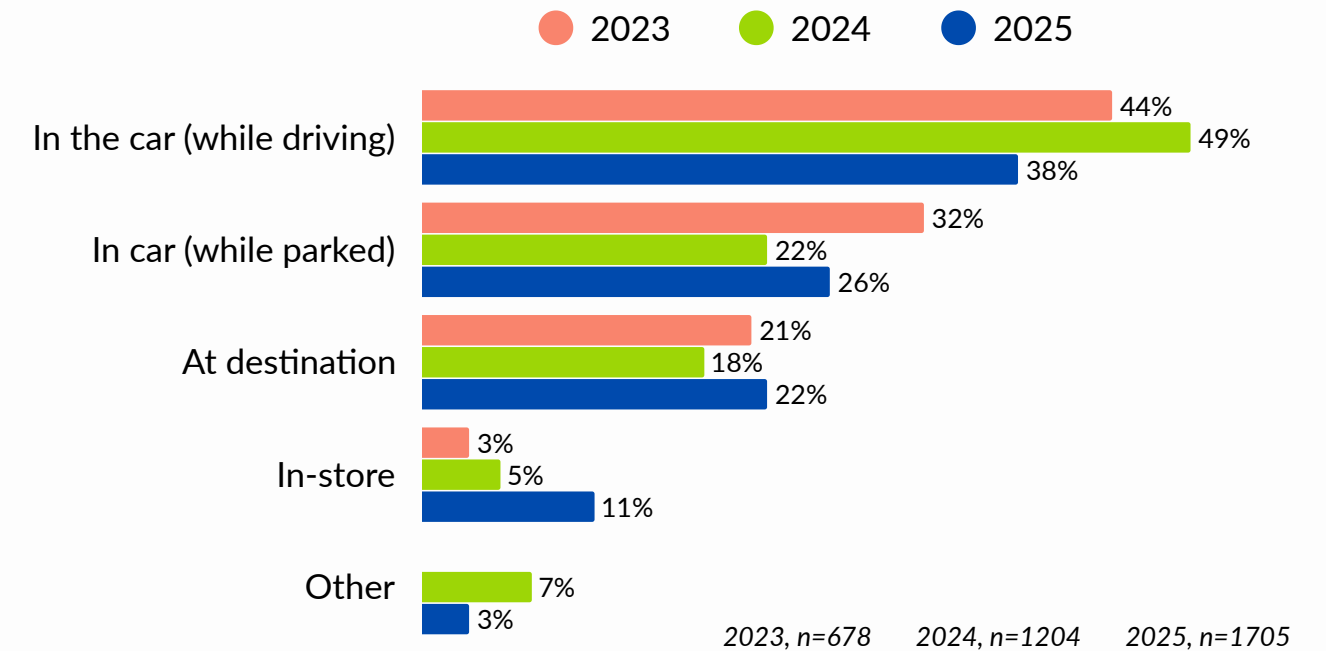
Convenience, as expected, is still king, but **promotions and taste** have moved into second and third place as motivators, reinforcing the importance that customers are placing on value and food quality.

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



In-Store Visits Matter

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

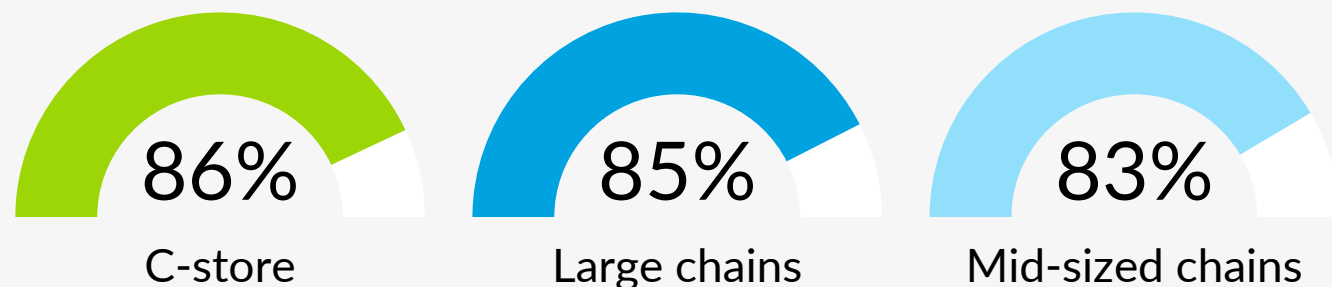


While on-the-go still dominates, a third of customers are now choosing to eat somewhere more deliberate. Either in-store or at their destination. That **11%** choosing to eat inside the store nearly **doubled** from last year. It's a small number, but it signals something bigger: the in-store experience matters, even if it's not the reason for the visit.



C-Stores Take the Lead in Pizza Taste Ratings

Our [2025 Pizza DELCO Study](#) proved the growing strength of c-stores as they lead the metrics in taste by 1 percentage point over large Pizza Chains like Dominos and Pizza Hut, and 3 percentage points higher than prominent mid-size pizzerias like Jet's Pizza.



Insights from the Field

What could this store improve to increase your willingness to recommend?

"The store could improve on the ready-to-go hot food options."

"More ready made hot food should be made available at night."

"I love their fresh bakery products. They sell out typically in the morning and limited choice during the afternoon."



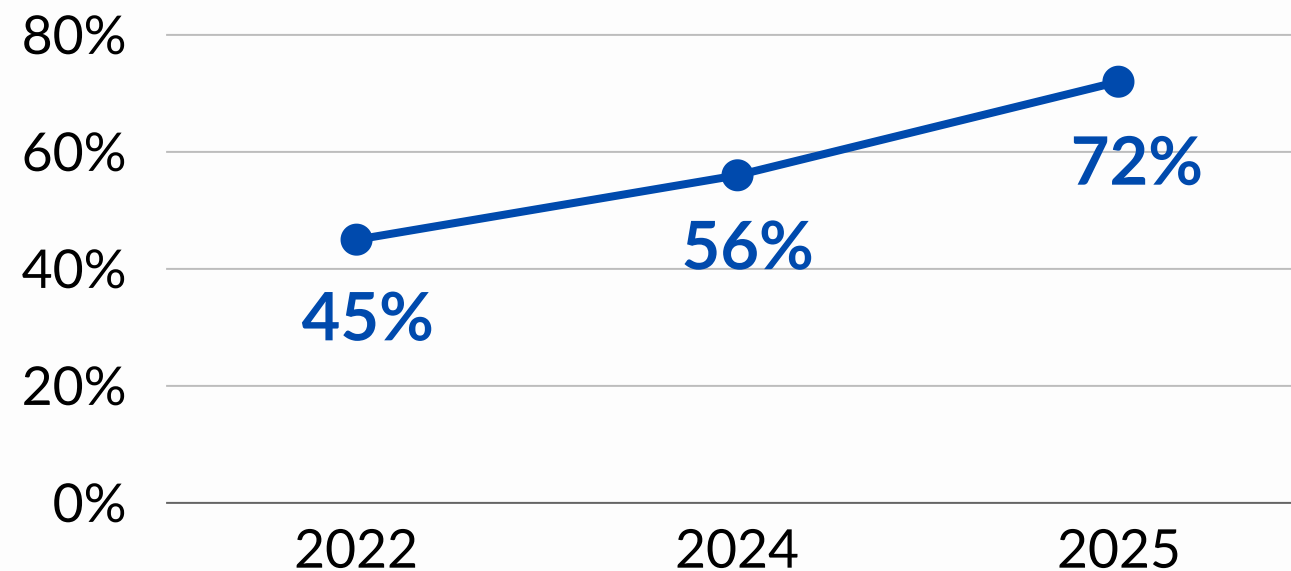
C-Stores vs. QSRs

Closing the Gap with Value

C-Stores vs. QSRs: *Closing the Gap with Value*

You walk into a c-store for a snack and walk out with a full meal, a drink, and change to spare. That's not luck. That's strategy. And it's why value is quickly becoming the most important battleground in foodservice.

72% of consumers now see convenience stores as a viable alternative to quick-service restaurants—up from 56% in 2024 and 45% in 2022. That's a 27-point increase over three years. The reason? One word: value.



2022, n=1209 2024, n=1204 2025, n=1705



75%

of consumers say made-to-order food at c-stores delivers serious bang for their buck—up 13 points from last year's 62%.

2025, n=1705 2024, n=1592



Value for Money is the New Battleground

In response to growing pressure, QSRs have ramped up their value menus to stay in the game. McDonald's launched its own \$5 Meal Deal.¹ Taco Bell dropped the \$5 Luxe Cravings Box, which helped drive a 5% jump in U.S. same-store sales.² Subway tested a \$6.99 Meal of the Day, but ended it early after weak results. In this raging battle for value, loyalty is the prize.³

In 2024, c-stores made their move. Circle K and EG America rolled out \$5 meal deals featuring breakfast sandwiches, pizza slices, and drinks.⁴ GPM loaded its Rewards app with offers like Tyson chicken for \$3.99, 25 wings for \$25 and pizza bundles for \$9.⁵ These weren't just discounts. They were calculated moves to win over budget-conscious QSR customers—and they worked.

Value Meal Insights

Value meals aren't just about the price. Customers want variety, flexibility, and control. 74% said more meal choices would make value offers more appealing, followed closely by lower prices and customization options at 72% each.

2025, n=1528

¹ <https://people.com/mcdonald-officially-unveils-a-usd5-meal-deal-with-mcdouble-fries-mcnuggets-drink-8666401>

² <https://www.reuters.com/business/retail-consumer/taco-bell-parent-yum-posts-quarterly-sales-beat-value-meals-whet-demand-2025-02-06/>

³ <http://restaurantbusinessonline.com/marketing/subway-ending-its-latest-value-offer-after-poor-performance>

⁴ <https://www.cstorediver.com/news/c-store-value-deals-circle-k-eg-america/728320/>

⁵ <https://www.cstorediver.com/news/how-c-stores-are-faring-in-the-qsr-value-war/722161/>



An Allegiance to Convenience *Building Loyalty*

An Allegiance to Convenience: *Building Loyalty*

C-stores that are getting loyalty right are pushing high-margin products with personalized offers, sneaking in upsells through gamified rewards, and keeping things fresh so customers don't check out—mentally or physically.

According to our survey, 72% of consumers are part of a retail loyalty program, and 67% said they'd still join even if it required downloading an app.

Translation: they're open to it, but only if it's worth their time. Your customers have more apps than they know what to do with. Yours should be one they're excited to tap.

But loyalty can be fragile. According to Tillster's report, **one in three diners** switched their favourite restaurant in the past year, with 46% citing better food and 40% citing better value as the reason why.¹ Convenience stores need to reinforce these standards within their loyalty programs to capture the switching customers.

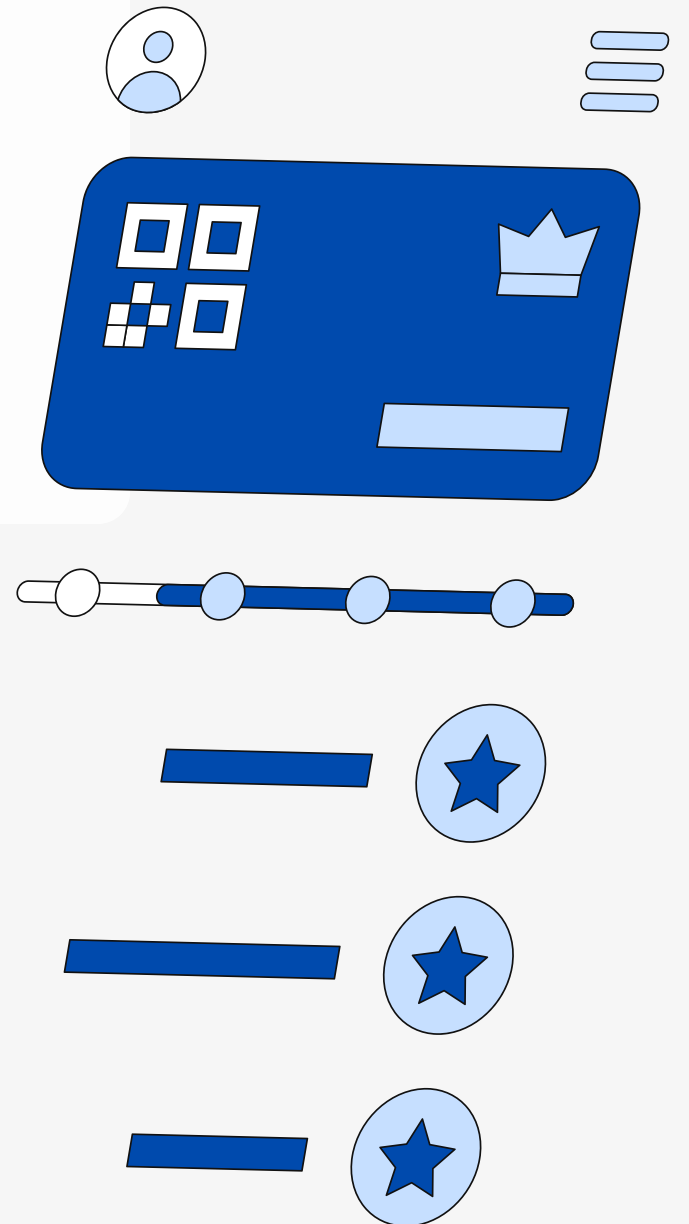
And here's where it really matters.

56%

of consumers say a good loyalty program sways their decision on where to shop.

That could mean choosing your store over a competitor or even skipping a favourite QSR.

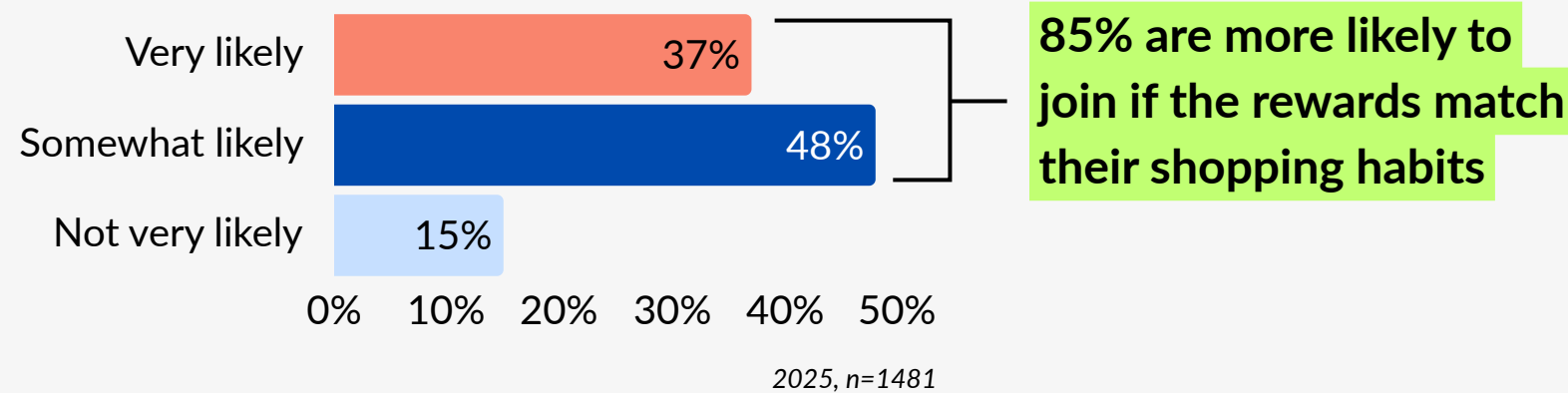
2025, n=1481



¹ <https://www.businesswire.com/news/home/20250414535235/en/Restaurant-Loyalty-in-Crisis-One-Third-of-Diners-Switched-Their-Favorite-Restaurants-in-the-Past-Year-New-Report-Finds>

Loyalty programs lose steam when they're slow, clunky, or uninspiring. Among non-members, 39% say it takes too long to earn rewards, 29% say their go-to brands don't offer one, and 22% just aren't impressed by what's on the table. There's plenty of potential, but earning loyalty means delivering experiences as dynamic as your customers.

Would you be more likely to join a loyalty program that offers personalized rewards based on your shopping habits?



Insights from the Field

What could this store improve to increase your willingness to recommend?

"The cashier asked me if I was a loyalty rewards customer. When I responded no, he just said "okay" and did not upsell it, explain the benefits, or ask if I wanted to join—what a missed opportunity."

Mystery Shopper Insight

Out of 1000 convenience store visits, the cashier failed to mention the loyalty program 65% of the time. This marks an increase from last year, when 78% of cashiers failed to mention the loyalty program during customer interactions, but still leaves room for improvement.

2025, n=1000



Gamification: *A Loyalty Engine*

Gaming is now the #1 activity on mobile, and nearly half of U.S. mobile gamers are aged 18–34.¹ Retailers are meeting this next-gen audience where they already are: on their phones, swiping for rewards in real time.

For c-store operators, this means turning loyalty into an experience. Customers can unlock buy-one-get-one offers, cents off per gallon, free car washes, and more. It's about habit-forming loyalty that keeps customers coming back. The proof is in the industry with companies like 7-Eleven increasing coupon redemptions by 150% with game-like loyalty challenges tied to mobile engagement.²

TXB, a family of restaurant-style convenience stores, built a custom game inside its loyalty app that responds to where customers are and what they're doing. Fueling up? The app serves in-store offers. Grabbing breakfast? It tees up lunch deals as a reward. The result is smarter promotions, higher sales, and a goldmine of customer insights.³

Break Time's tiered program drove a 42% jump in transaction share and 25% higher spend. Offers tailored through first-party data, brands now are boosting visits and spend for convenience stores.⁴

What's the takeaway? Give customers something to do, and something to gain.



Source: 7-Eleven Mobile App

¹ <https://www.cspdailynews.com/technologyservices/gamification-drives-loyalty-engagement>

² <https://www.globalconveniencestorefocus.co.uk/features/gamified-loyalty-how-7-eleven-achieved-150-more-redemptions>

³ <http://cspdailynews.com/technologyservices/txb-adds-gamification-its-loyalty-app>

⁴ https://www.convenience.org/Media/Daily/2025/January/7/5-Gamified-Loyalty-Can-Increase-Visits_Research



Rethinking the Store Itself *More Tech, More Expectations*

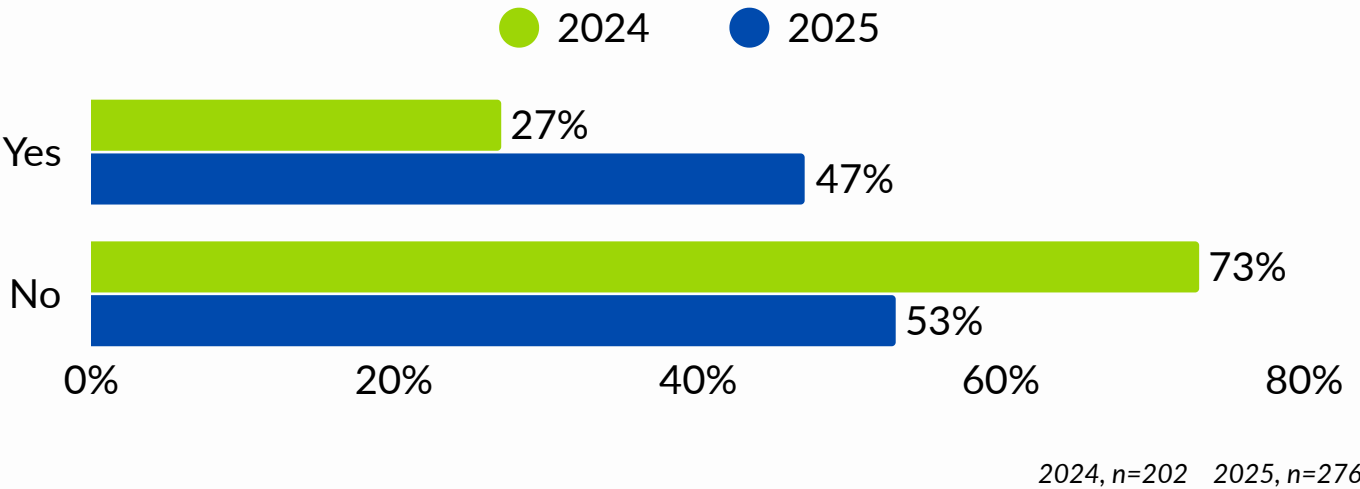
Rethinking the Store Itself: *More Tech, More Expectations*

C-stores are evolving into something smarter. From the moment a customer steps out of their car to the second they walk out with a purchase, every part of the store experience is being reimagined to drive convenience, connection, and conversions.

Retail Media: The Screens Are Talking

Let’s talk screens. Convenience store operators are doubling down on retail media as 47% of our shoppers sighted digital ads on premise compared to just 27% last year.

Did you see any digital ads on the premises?



Mystery Shopper Insight

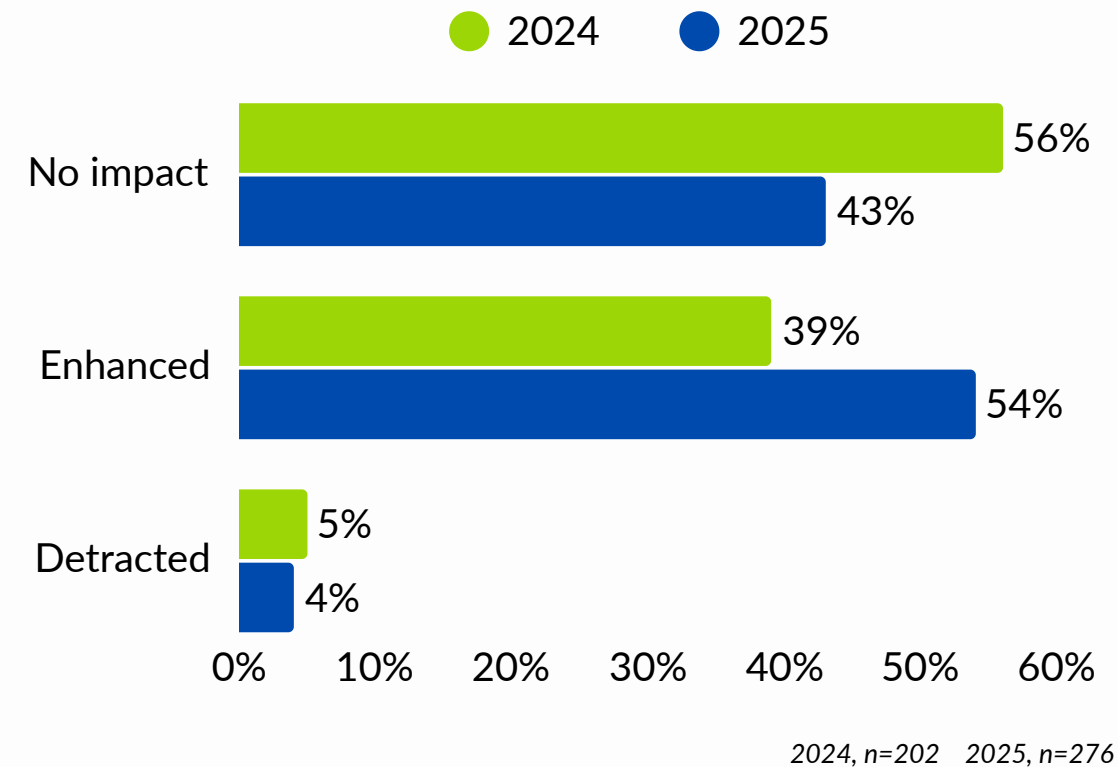
Of the stores with digital ads, 57% were on in-store walls, 46% at the pump, 44% at the cashier, 8% on fridges, and 3% on EV charging stations.

2025, n=276



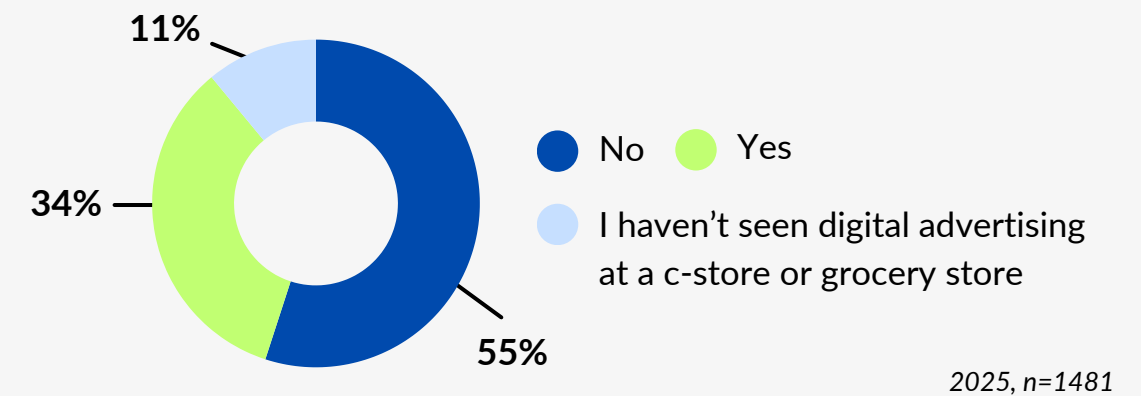
Retail media is continuing to turn pump-side and point-of-sale into money-making real estate. An increasing trend shows that as prices climb, more customers are turning to on-screen deals to shop smarter.

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



The proof is in the numbers as over a third of the consumers we surveyed admitted that they've **actually bought something because of digital advertising**. That's attention turned into action.

Have you bought anything as a result of digital advertising you have seen when visiting a convenience or grocery store?



Big players like Wawa, 7-Eleven, and Casey's have already launched retail media networks, but the real growth is still ahead. The retail media space is projected to nearly triple by 2028, hitting \$129.9 billion, up by \$75 billion from 2024. While in-store retail media is only expected to claim \$1.1 billion of that \$75 billion, analysts say that number has the potential to be far greater if brands lean into the opportunity.¹

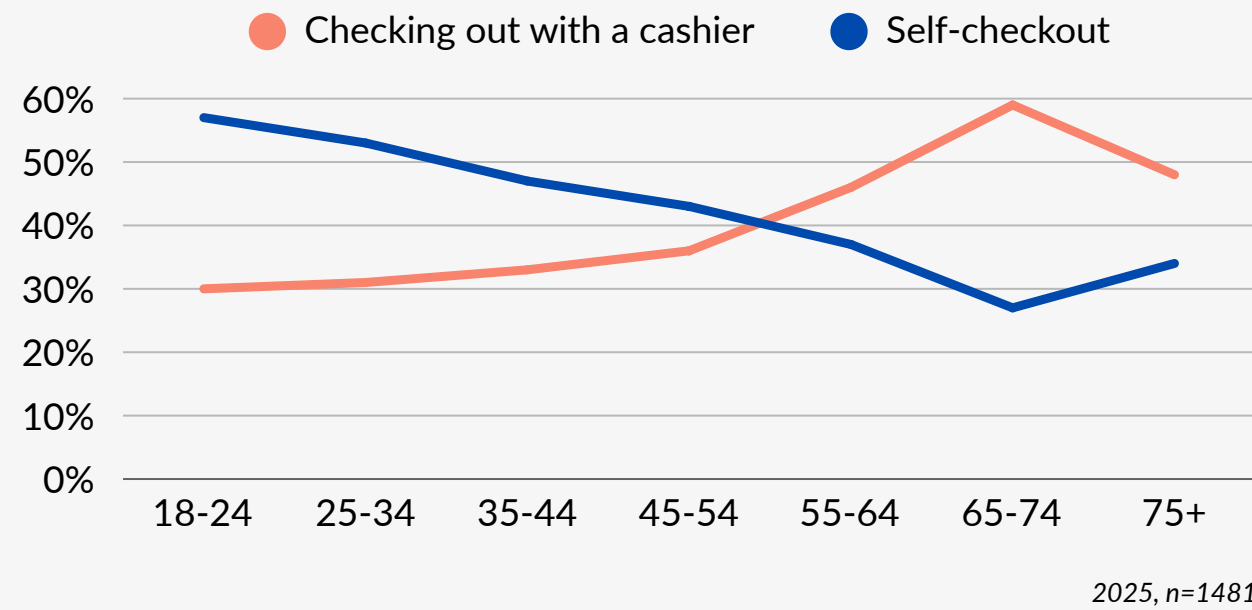
¹ <https://p2pi.com/store-now-stage-emergence-store-retail-media>

Self-Checkout and Alternative Journeys

Let's talk checkout flow. **42% of consumers prefer self-checkout**, down slightly from 46% last year. So what's driving the preference? It's faster (**82%**), avoids interaction with employees (**41%**), and lets people pack their bags the way they like (36%). And that hands-off experience is especially appealing to younger customers. **More than half of Gen Z and Millennials prefer checkout options with zero human interaction**, according to GoDaddy's Consumer Pulse survey.¹

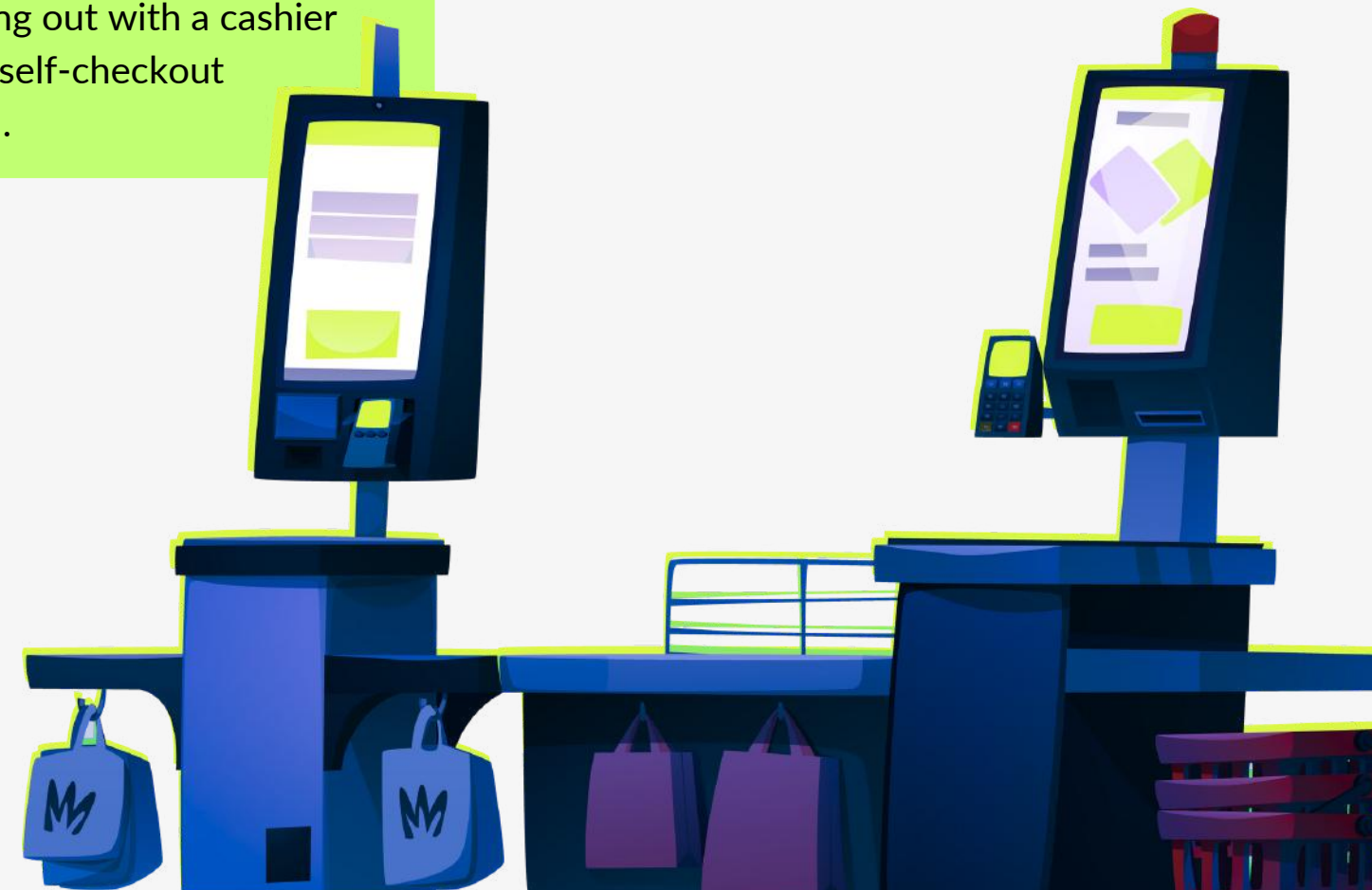
But don't count out the cashier just yet. 40% still prefer human checkout, often because they enjoy the interaction or want help with bagging. Our demographic data supports this as well. Older generations continue to gravitate toward person-to-person service, and that sense of familiarity still matters.

Preference for Checkout at Self-Checkout vs. Cashier by Age



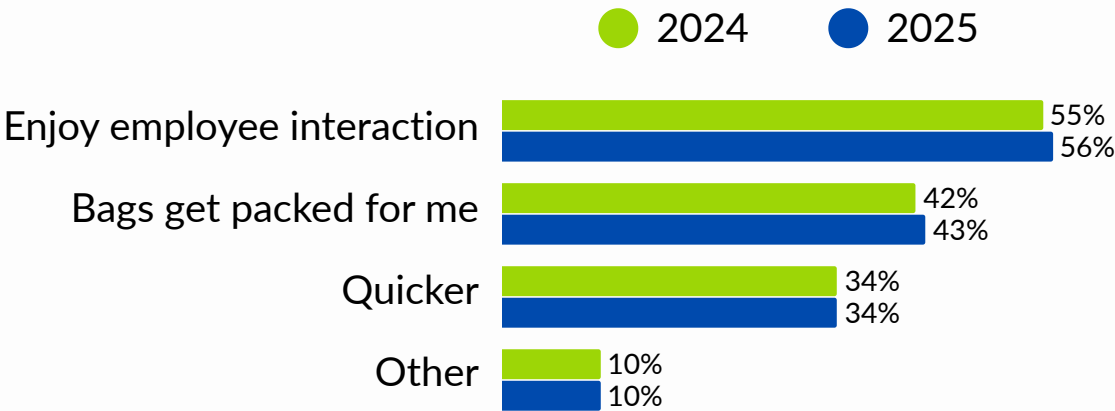
55 years

and older is when the customer starts preferring checking out with a cashier over a self-checkout system.



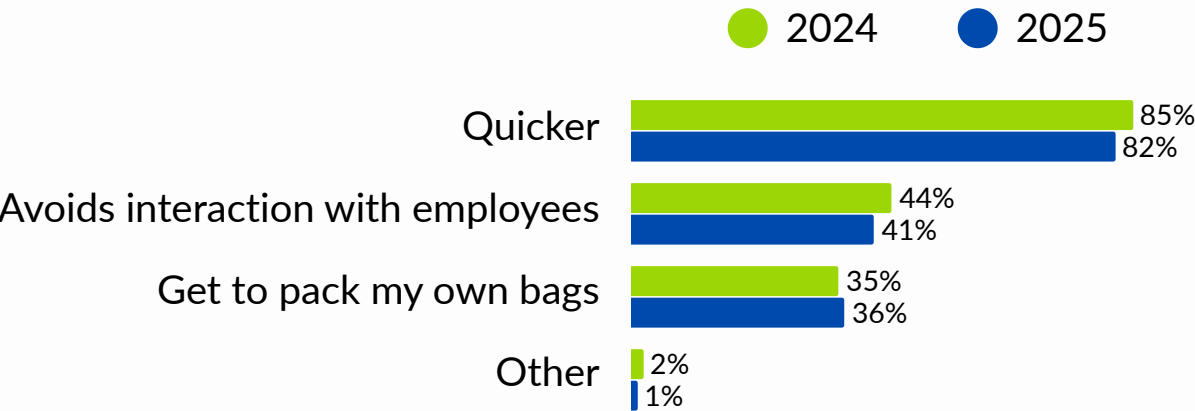
¹ <https://chainstoreage.com/survey-gen-z-millennials-use-e-commerce-self-checkout-avoid-other-people>

Why do you prefer checking out with a cashier?



2024, n=559 2025, n=598

Why do you prefer self-checkout?



2024, n=704 2025, n=627

Insights from the Field

What could this store improve to increase your willingness to recommend?

“There should be employees who speak with their customers. The only thing the cashier said to me was the total.”

“I would have preferred to interact more with an employee. There was no greeting or engagement beyond being asked if I had a rewards card.”

Mystery Shopper Insight



87% of cashiers didn’t suggest additional items, leaving a major upsell opportunity on the table. While cashier interactions are getting more attention, their ability to drive value through upselling is still underused.

2025, n=1000



Mystery Shop Insight

In 2025, 59% of stores offered some form of electronic ordering—up dramatically from just 37% in 2024.

2025 & 2024, n=1000

The jump in electronic ordering—from 37% in 2024 to 59% in 2025—signals a broader push by convenience stores to accommodate digital-first customers. Most notably, **touchscreen terminal availability surged from 28% last year to 51% this year**, signaling widespread investment in in-store tech that speeds up service.

Every pump screen, checkout lane, and app interaction is a chance to connect with customers and drive measurable impact. This is the new frontier, where design drives revenue and every touchpoint earns its place.



Insights from the Field

What could this store improve to increase your willingness to recommend?

“Adding a self pay option would be good.”

“One of the self-checkout terminals was out of order, and there were several low stock levels.”



Your Store,
Your Standard
Clean Floors,
Bigger Scores

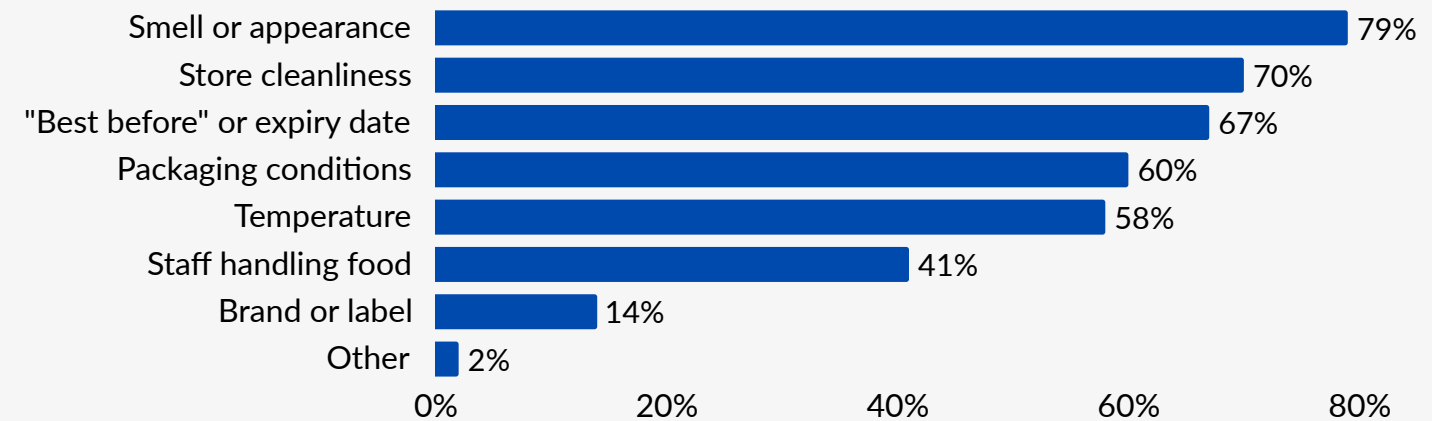
Your Store, Your Standard: *Clean Floors, Bigger Scores*

When customers walk into a spotless store, they feel it. They trust it, and they come back for it. Take Buc-ee's, for example. Their restrooms are so consistently spotless, they've earned national praise and a loyal following.¹ The idea for convenience stores is to create an environment that tells customers, "We care about every detail." That level of commitment turns a quick stop into a memorable experience.

Nouria clinched the top spot in **CSP's 2024 Mystery Shop Audit**, and cleanliness was a major reason why.² They earned a perfect score for interior cleanliness, thanks to spotless cash counters, dust-free shelves, clean ceilings, organized merchandise, and fully functioning lighting. Even their floors came in at 99%.³

Stinker Stores secured second place, scoring high for their consistently clean bathrooms, tidy parking lots, and well-kept store exteriors.⁴ When every inch of your store looks cared for, customers trust it more, and they're a lot more likely to return.

What signs do you look for to judge whether food is fresh at a convenience store?
(Select all that apply)



2025, n=1286

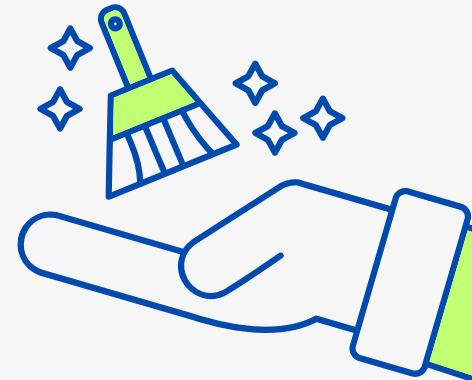
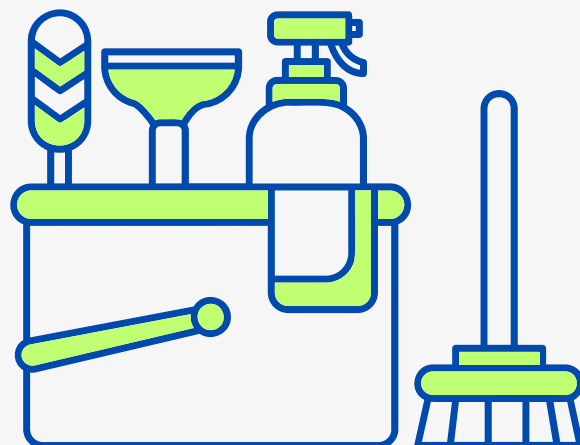
Clean floors and tidy counters do more than look good. 70% of customers say store cleanliness helps them decide if the food is fresh. The perception: If the space feels off, the food does too.

¹ <https://www.cnn.com/2023/10/01/travel/bucees-gas-station-convenience-popularity-cec>

² <https://www.cspdailynews.com/mystery-shop-solved-leading-chain-unveiled>

³ <https://www.cspdailynews.com/company-news/convenience-store-chain-nouria-wins-csps-2024-mystery-shop-audit>

⁴ <https://www.cspdailynews.com/company-news/stinker-stores-secures-second-mystery-shop-competition>





The Good Vibrations Matter

Cleanliness sets the tone, but it's your people who seal the deal. Customers notice when a store is spotless, but they remember how they were treated. Friendliness is what turns a routine stop into a brand they trust.

Overall, how would you rate the service you received today?



Friendly

75%



Neutral

22%



Not Friendly

3%

2025, n=276

Closing Thoughts: *Where Convenience Goes from Here*

This shift isn't a surprise. It's been building for years. But in 2025, it's crystal clear that convenience stores are stepping into a bigger role. They're grabbing a seat at the quick-service table, rolling in with brisket, rewards, and digital real estate.

What's fueling this rise? Customers are chasing better value and better experiences. For convenience store operators, the next step is getting laser-focused on where the biggest opportunities lie.

How we can help fuel the momentum

1

Start by listening to the people who matter most: your customers. Whether it's feedback on food freshness, store cleanliness, or loyalty experiences, every response tells a story. With tools like **IntouchSurvey®**, you can collect compelling feedback that shows you what guests love, what's falling flat, and how sentiment shifts across dayparts, locations, or new promotions.

2

Next, make your execution delivers on your brand promise. Are made-to-order stations performing during peak hours? Are teams meeting standards for cleanliness, speed, and service? Tools like **IntouchCheck®** turn paper checklists into mobile-first inspections so you can see exactly what's happening across your locations. A digital checklist and inspection software helps you spot gaps and take action before it hits the customer.

3

Finally, go beyond what people tell you and see how your standards are being executed in the field. Mystery shopping helps you pressure test your customer journey, from the first pump-side screen to the last loyalty prompt at checkout. A strong **Mystery Shopping Program** helps you see an unbiased evaluation of how real-world staff behavior, signage, and service moments are actually landing.



About Intouch Insight

Intouch Insight is a CX solutions and mystery shopping company specializing in helping multi-location brands achieve operational excellence, exceed customer expectations, and build long-term customer loyalty. We are proud to deliver growth solutions to over 300 of the world's most beloved brands.

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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