

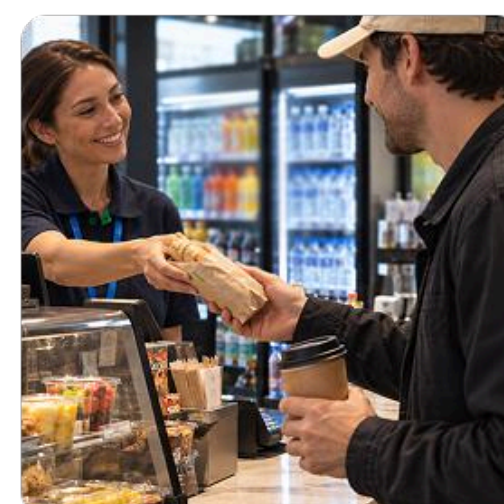
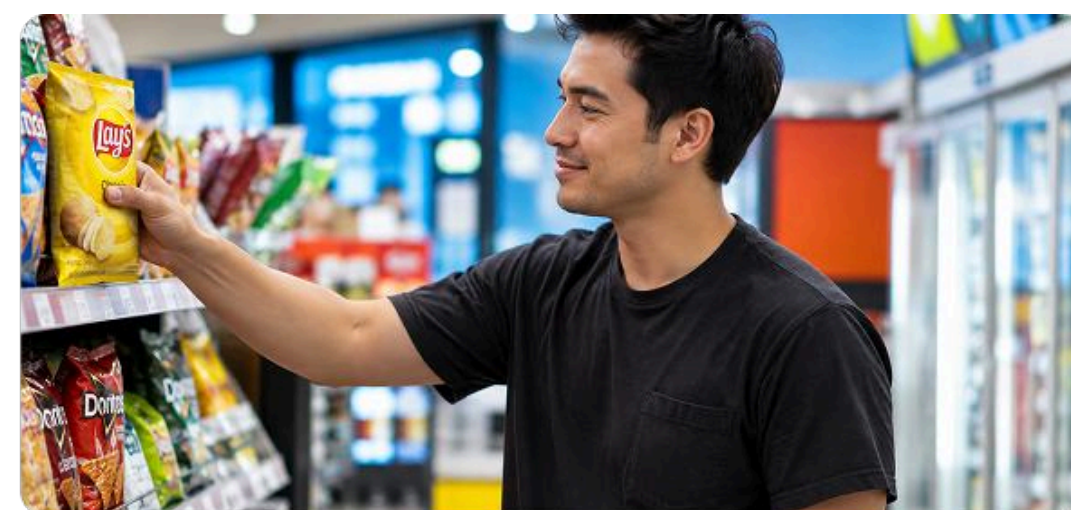
THE C-STORE RESET: REIMAGINING CONVENIENCE BY STAYING TRUE TO ITS STRENGTHS

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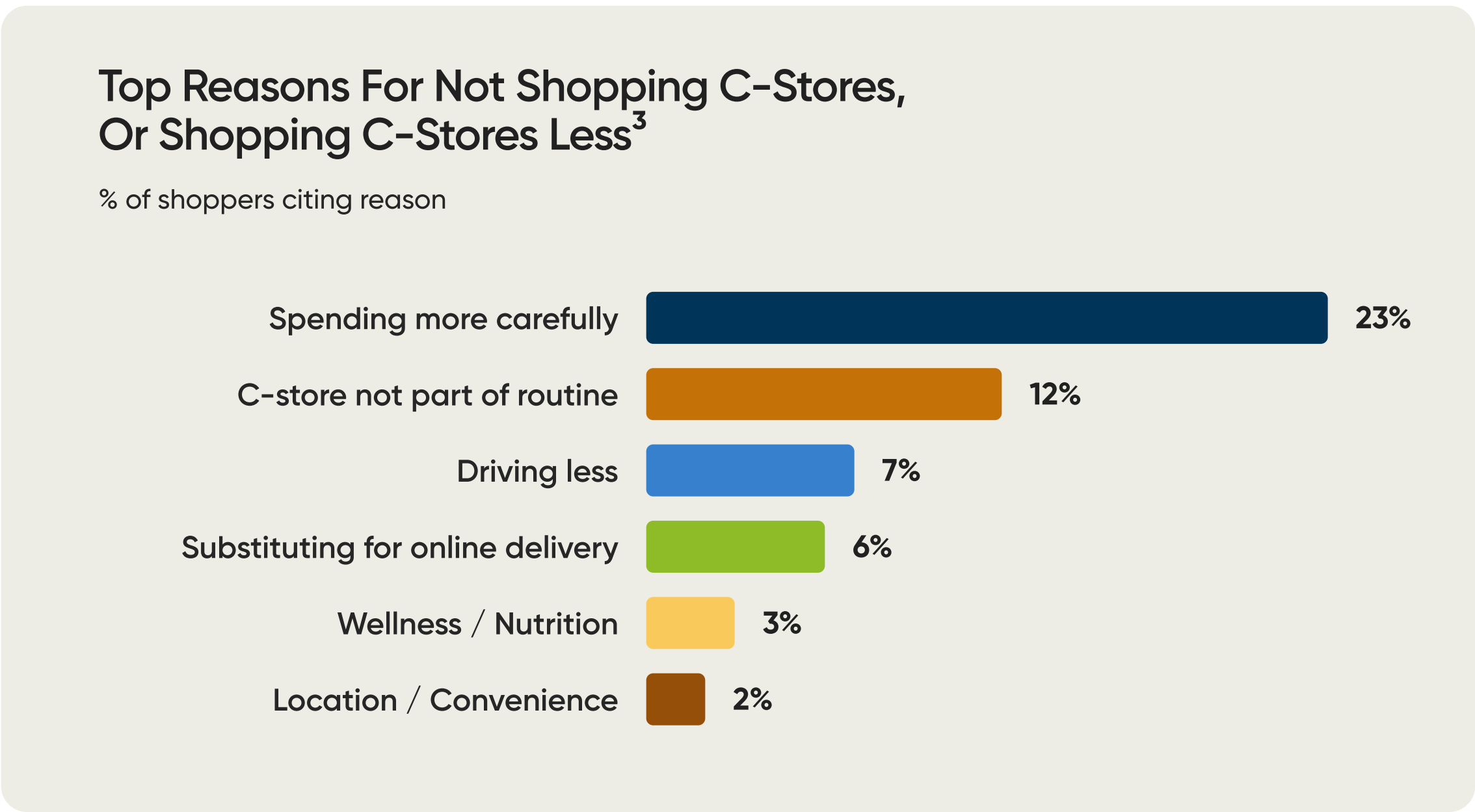


INTRODUCTION

The convenience store (c-store) has weathered many storms and pioneered countless retail innovations since its inception almost a century ago. Yet, today, **economic headwinds and the growth of online shopping are putting new pressure on c-stores** (and most other brick and mortar outlets) in ways that can feel unprecedented.



As inflation and fuel costs make venturing out more costly and as digital delivery options promise to make convenience even faster and easier, **c-stores find themselves having to confront a multitude of challenges at once**. And in a world where four in five c-stores sell gas at a time when almost all households (92%) are looking to cut fuel spending, even the classic fill-up-plus-a-drink trip becomes challenged.^{1,2}



These pressures are real. But economic **headwinds like inflation and fuel prices are cyclical**. And the structural challenges posed by the rise of **convenient, omnichannel shopping can be turned into an advantage** by a channel born to always be only minutes away.

The answer, therefore, is not for the c-store to become something it was never meant to be. Rather, it's to **extend the strengths the convenience channel was born to own, weather the cyclical headwinds, and let today's structural challenges power digital innovations** that will carry the c-store into its next 100 years.

As always, it starts with what shoppers need. And there are **four needs c-stores are uniquely positioned to deliver on - routine, discovery, ease, and perceived value**.

1. ROUTINE

THE RITUAL AROUND THE CORNER

No other retail channel is more physically present in American life than the c-store. There are over 150,000 convenience stores in the country, most of them neighborhood businesses with less than 10 stores. More than 40% of shoppers live within just one mile of one, and in rural towns, where the c-store is often the only retailer for miles, 86% of residents live within 10 minutes of one.⁴

So when we hear that c-store is the most “unplanned” shopping channel, with trips “decided in the moment” indexing at 131 versus all other channels, it may be easy to conclude that there’s nothing intentional or predictable about these trips.⁵ On the contrary, **proximity allows people to create routines that fit their lives in ways that can spontaneously enhance them**. That’s why 81% of c-store shoppers visit their own, specific c-store on a weekly basis.⁶

Convenience trips are one of the most habitual retail behaviors, woven into commutes, workdays, school runs, and road trips. And that can be seen in the types of Trip Mission motivations c-stores significantly over index on vs. retail in general. (For more insights, read our Trip Missions report [here](#).)

TRIP MISSION TYPES OVER-INDEXING IN C-STORES ⁷



This is why it’s important to look at shoppers who are growing their c-store trips even in the current climate. When we do, we see that they use the channel more broadly than others. They visit as part of **the work routine, for meals, and for take-home needs**. And these are **the kinds of habitual needs and occasions which are growing**. Shoppers increasing their c-store trips skew more planned and routine (31% plan in advance and 27% shop as part of a usual routine), while most people reducing trips typically do not plan the trip at all (58%).⁸

Implications for retailers:

The opportunity, therefore, is to **deepen the routines shoppers create around “their store,”** offering beverage, snack, foodservice, and take-home solutions that fit how shoppers already map out and time their day.

Opportunity	Insight	Action
Offer compelling rewards for those who shop regularly	Loyalty already runs on routine: 28% of routine shoppers choose their c-store for its rewards program. ⁹	Reward regulars for frequency, not just spending, to drive trips and seed new routines.
Meet them where they are in their day	Work routine, grab-for-later trips & grab a quick meal are the fastest-growing need states (+31%, +33%, +36%). ¹⁰	Offer commute stops for Millennials, morning rituals for Gen X, and late-night meal deals for Gen Z.
Bring routines together around the pump	Checking fuel prices is the channel's most distinctive pre-shop habit (32%, 267 index vs. other channels). ¹¹	Unite fuel rewards, frequency offers, and food menus in that same daily glance.

2. DISCOVERY
WHERE THE NEW
SHOWS UP FIRST

If routine is half of the c-store trip, then discovery is the other. The word convenience is rooted in “convene”: to come together. And bringing things together is what it does, in the large, diverse, and always novel assortment c-stores offer. So whether they’re there for the weekly fill up or an emergency battery purchase, the benefit is that once in-store shoppers can address additional, adjacent needs.

Being thirsty or hungry are clear motivations for purchase, with 39% of visits including an additional unplanned food or beverage purchase. And what’s bought is enjoyed fast: 91% of purchases include at least one item consumed within the hour.¹² But **an equally powerful need is the need for novelty and discovery**, making assortment king when it comes to the c-store channel. The expectation that my c-store “**has a better beverage selection**” and “**has a better snack selection**” is key to driving shopper visits.¹³ For those seeking out what’s new and in demand, c-stores with the best available selection win the trip.

This explains why c-stores over index with Reward trip missions (228i), defined by looking for something new or interesting to try, taking a break, and treating yourself.¹⁴ Convenience is the channel where innovation shines. **New flavors, new formats, limited time offers, and the collision of food, beverage, and pop culture can turn a quick stop into an event.**



In 2026, innovation means branching into unexpected territories for traditional convenience. Consumer expectations for food and beverages continue to evolve. Great taste remains foundational. Eighty-four percent of consumers cite taste as the top driver of food and beverage purchases. But **shoppers increasingly seek products that address a broader range of needs, including hydration, functionality, and well-being.**¹⁵ For example, 23% of those shopping c-stores less cite trying to make healthier choices as a reason they make fewer c-store trips.¹⁶

Shoppers shopping at c-stores less today say they want to be able to discover more of the following.

I WISH THE C-STORE OFFERED MORE ¹⁷ ...



Implications for retailers:

The opportunity is to **make the c-store the easiest place in retail to find something new, including the functional benefits** shoppers increasingly want.

Opportunity	Insight	Action
Seed discovery before they walk in	Shoppers staying away over-index on wanting new and unique products (132i) & meal-prep selections (140i). ¹⁸	Lead pre-shop messaging with what's new; let novelty bring back shoppers who think they've seen it all.
Make functional benefits impossible to miss	52% of those seeking functional products tend to not shop at c-stores. ¹⁹	Create clear better-for-you sections in- store & nutritional filters in the app.
Put the new and unexpected on display	Shoppers use signage 46% (118i) & displays 40% (167i) to find value; ²⁰ shelf strips & non-lobby displays are top unplanned purchase drivers. ²¹	Introduce the new via endcaps, cooler doors & checkout displays, and extend the hunt with branded shelf strips beyond the lobby.

3. EASE

EVEN MORE EFFORTLESS CONVENIENCE

Convenience will always mean being **the place you can get in and out fast**, helping to save time and effort. But it **can also mean being the place you don't have to visit in person at all** if you don't have the time.

The good news is that the c-store channel has made significant strides in its core brick-and-mortar competencies in recent years. **Shoppers' evaluations of c-stores as places that make it "easy to find what I need" are up 6 points versus three years ago, and "easy to get in and out" is up 7 points.** That's important because shoppers continue to prioritize faster checkout (18%) and a drive-thru (16%) as central to an improved c-store experience, right alongside price and a shift to more functional products.²²

SHIFTS IN SHOPPERS' C-STORE PERCEPTIONS ²³



As we've seen over the past two years (see [Omnichannel](#) and [Five Trends in Online Grocery](#) articles), the convenience offered by online delivery can be seen as a rival to the proximity offered by the c-store channel. But that needn't be the case. **A c-store's own delivery options, apps, and delivery partners can become extensions of the store's proximity, carrying the channel's ease and immediacy right into shoppers' homes.**

Unfortunately, the convenience channel app experience has not kept pace, with shoppers rating c-store apps' ability to build and manage online orders **3 points lower today** than they did a year ago. In a competitive omnichannel world where the loyalty app is a window on value, making the app-based ordering experience as seamless as possible should be a top priority.

Implications for retailers:

The c-store channel's **ubiquity can also provide significant advantages in the digital space.**

Opportunity	Insight	Action
Make pre-shop an in-store accelerator	83% of c-store shoppers are reached through rewards & mobile app pre-shop levers. ²⁴	Use reward check-ins, digital ads, and homepage highlights to help planning and getting in-and-out a breeze.
Bring the utility of the app in-store	"App improves in-store shopping experience" is a top store choice driver that makes retailers stand out. ^{25a}	Help create more frictionless experiences in store by linking past purchases and deals online and off.
Cut the final seconds off the trip	Frictionless options like self-checkout already rank as winning store choice drivers. ^{25b}	Pilot self-checkout and scan-and-go, and treat the drive-thru as a real edge over grocery, mass, and QSR.

4. VALUE

VALUE YOU CAN SEE

Value perceptions are where c-stores are most pressured. Thirty-six percent of those shopping less are cutting unplanned purchases to save money, and 30% say they now buy the same items elsewhere for less.²⁶



The fix isn't a race to the bottom on price. Much of the problem is value transparency and legibility because **confusing offers make it hard for shoppers to see the value and time savings are hard to quantify**. Discrete value sections, clear everyday pricing on essentials, and meal pairings that make the deal simple, fast, and obvious allow the true value of convenience to shine through.

Because when true value is revealed, it can become a tie-breaking competitive advantage. And loyalty programs visualized through apps are the best way to track and visualize that value. This helps explain why **loyalty programs are the #1 driver of increased trips for those shopping c-stores more today** (37% of shoppers), and why 63% of those shopping c-stores more today are c-store loyalty program members. **Younger shoppers in particular (72% of Gen Z) say loyalty rewards make them shop more.**²⁸



Implications for retailers:

Shoppers want clear deals, framed not in terms of just money they can save, but in terms of **time savings and additional value they can get for that money**.

Opportunity	Insight	Action
Make the meal pairing a clear unit of value	Meal pairing rewards index 144 vs. other channels, and simple Value Meals outperform dollar-off combos. ^{29a, 30a}	Build the offer as one item, one drink, one snack, at one clear price, delivering value by inclusion, not discount.
Optimize the deal, not the discount	The same offer works measurably harder when it stretches across flavors, then brands, as an open buy instead of a must-buy. ^{30b}	Strengthen value perception through choice, simplicity, and findability before touching price.
Pay loyalty out in fuel and food	Shoppers want to earn on every purchase, including prepared food (121i), and their top redemption preferences are fuel savings (204i) & meal pairings (225i). ^{29c, 30c}	Structure program so loyal customers work up to fuel & meal pairing rewards, with the app as the place perceived value compounds.

CONCLUSION

Shoppers today are only asking for c-stores to become more of what makes them great. **Deepen the routine and trips and loyalty grow. Lead with discovery and the trip becomes a joyful experience. Make convenience even more effortless and reveal true value and those shopping less today will begin to return.** When the economic headwinds subside, stores that doubled down on what makes them convenient will be the ones positioned to grow into their next hundred years.



LET'S GROW, TOGETHER

Partner with PepsiCo to co-create the strategies that will re-earn the trip, growing the categories that drive it, and let's continue to innovate together to drive growth, today and for years to come.

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