driven by convenience: seven shopper needs powering c-store trips

(approximately 7-minute read)

introduction

In this pepviz™ article, we draw on PepsiCo's proprietary research to showcase the diverse range of shopping drivers behind c-store trips. We'll reveal a constellation of shopper preferences and behaviors and offer unique insights and strategies to help retailers grow with their own mix of current and future shopper segments. In the end, we hope this preview inspires you to partner with PepsiCo to apply these insights and tailor solutions to your shoppers' unique needs in this ever-evolving space.

1. the state of convenience

The convenience channel has undergone significant change in recent years, seeing the very definition of 'convenience' evolve and break out of traditional channels. Yet one basic truth remains when it comes to why people shop at c-stores - **food and beverage are a leading driver of convenience.**

In America, 13% of all snacks and 25% of all beverages are purchased through the c-store channel.[1] Last year, in-store revenue from sales of drinks, snacks, foodservice, and merchandise (not including fuel sales) reached $335.5 billion, representing nearly **40% of total c-store revenue** and marking the 22nd consecutive year of **record in-store sales.**[2]

And the need for **fast, easy, and high quality food and beverage options are driving innovation in convenience**. Outlets beyond c-store are now evolving beyond traditional offerings to pioneer new and convenient ways to shop – rapid delivery services, new "grab-and-go's" at grocery stores, and upgraded dollar store convenient offerings.

Rapid delivery services

- digital-first "quick commerce" outlets with 30-minute-or-less fulfillment windows
- fueled by younger, more diverse users
- projected to grow 20% over the next three years[3]

Grocery store "quick stops"

- blurring the lines between grocery, c-store, and QSR
- mini c-stores within grocery store footprints
- provide quick access and fast check out in minutes

Dollar stores

- beginning to offer more fresh food
- a wider assortment of packaged food and beverage options
- installing scan-and-go technologies to further speed up the shopping experience[4]

And looking to the future, projections show the **c-store channel is expected to grow at 3.8% in 2026**, factoring in online growth.[5] As macroeconomic factors rise and fall and as formats and technologies evolve, it becomes increasingly important to understand the full spectrum of underlying shopper needs driving convenience shopping trips in the first place.

2. timeless convenience drivers

The more things change, the more some things remain the same. And some things become even more important. For a convenience channel to meet the minimum expectations of shoppers, it must continue to offer the fundamentals. Proprietary PepsiCo research finds that the main drivers of retailer choice in convenience are **ease, shopping experience, and assortment.** Last year, **retailers made progress on improving shopper perceptions on core ease and assortment dimensions.**[6]

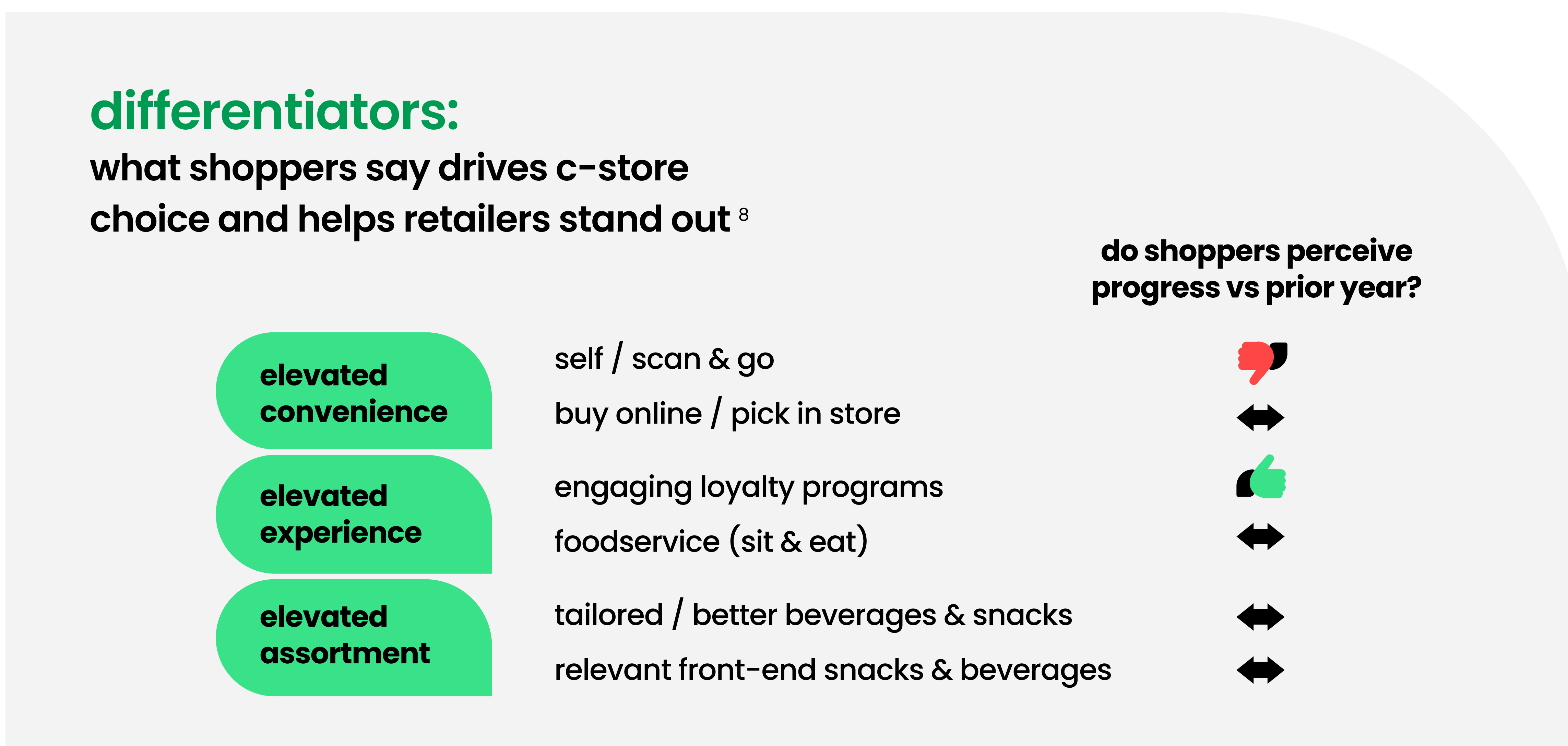
What really drives retailer preference in truly differentiated ways, however, is the ability to deliver even more elevated versions of ease, experience, and assortment.

- **Extraordinary ease takes in-and-out to the next level with self-checkout.** Then it makes ease fully "phygital" by offering the ability **to buy online and pick-up in store.** (read our Phygital article)

- **Extraordinary experiences** mean being able to **sit down and eat prepared food in-store** then being rewarded with **engaging loyalty programs.**

- And **extraordinary assortment calls for tailored, higher quality beverages and snacks**, especially at the front-of-store where 61% of c-store trips include a checkout purchase.[7]

- C-store shoppers report that they've seen progress over the past year in creating more engaging loyalty programs which is critical for the channel as it increasingly competes with digitally native alternatives.



The stability of these core drivers over time implies a set of universal needs at the heart of choosing convenient shopping channels over others. But ease, experience, and assortment can be decomposed further into an even more **insightful and strategically useful view of shopper needs based on a deeper understanding of the what drives trips.**

Let's take a look!

3. c-store needs: a deeper look

While shoppers initiate trips to c-stores for countless reasons, our proprietary PepsiCo C-Store Shopper Needs Segmentation reveals that **72% of all c-store trips can be broken down into seven fundamental trip-driving needs.**[9] We have found that these seven needs are specific and distinct while remaining broadly applicable and actionable. (All the data and insights that follow are derived from this study.)

upbeat errands

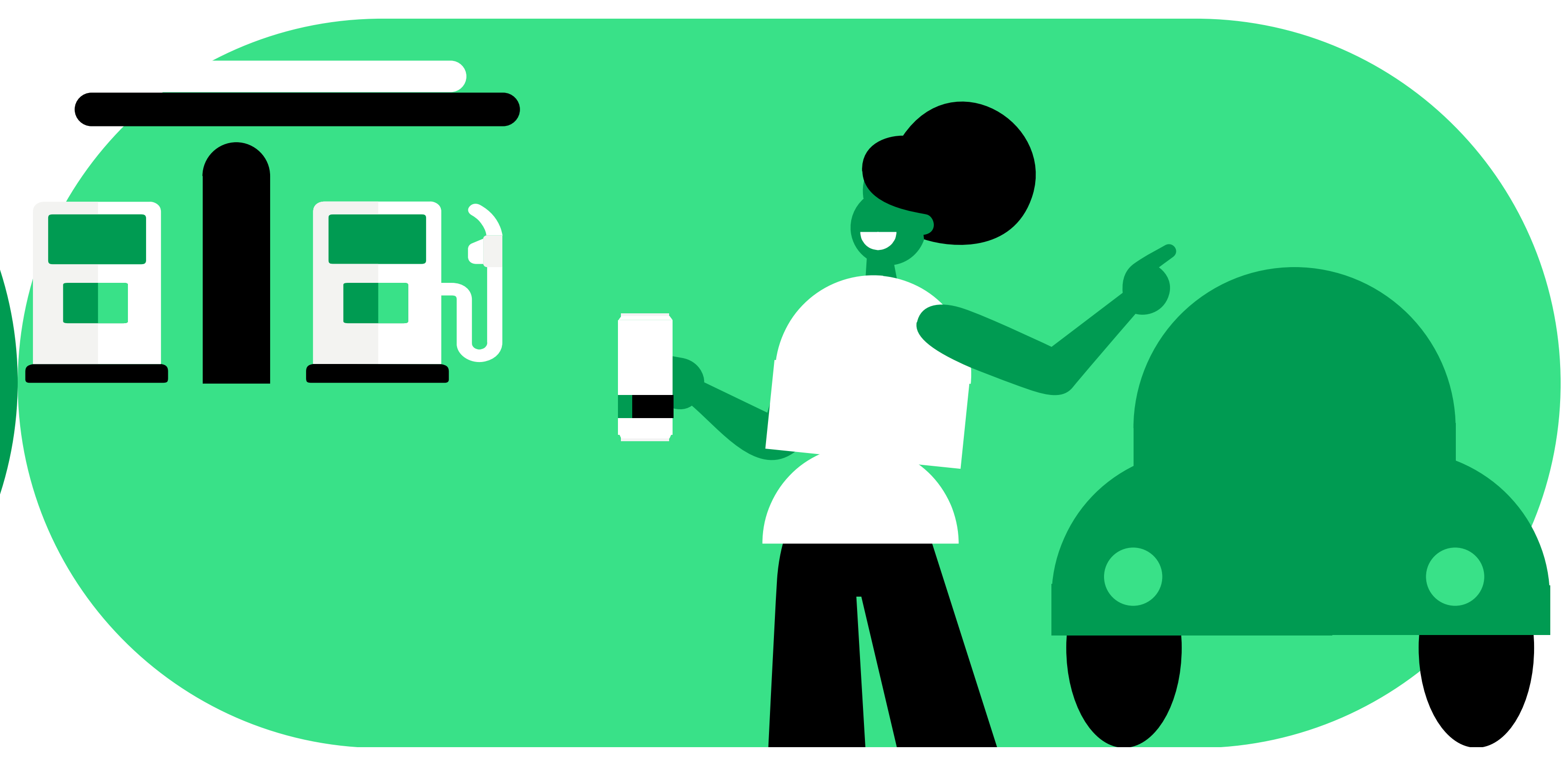
c-store explorers on a mission to get things done

> "We were so excited after my son's football game, I stopped at [our c-store] to get drinks for myself and my boys."

when in rome

the "might-as-well" crowd not originally there for food & beverage

> "While fueling up, I figured I might as well quickly grab my favorite energy drink to lift my spirits and help me get through my day."



for or with a meal

diners looking for something yummy

> "I needed lunch, so I ordered a sandwich and my favorite snacks for delivery. An in-app promotional discount cemented my decision."

before or returning to work

on task but looking for a break from the work day

> "I was in the middle of a task at work, and I realized I could use a snack, so I went to [local c-store] for something to hold me over until lunch."

quick / immediate need

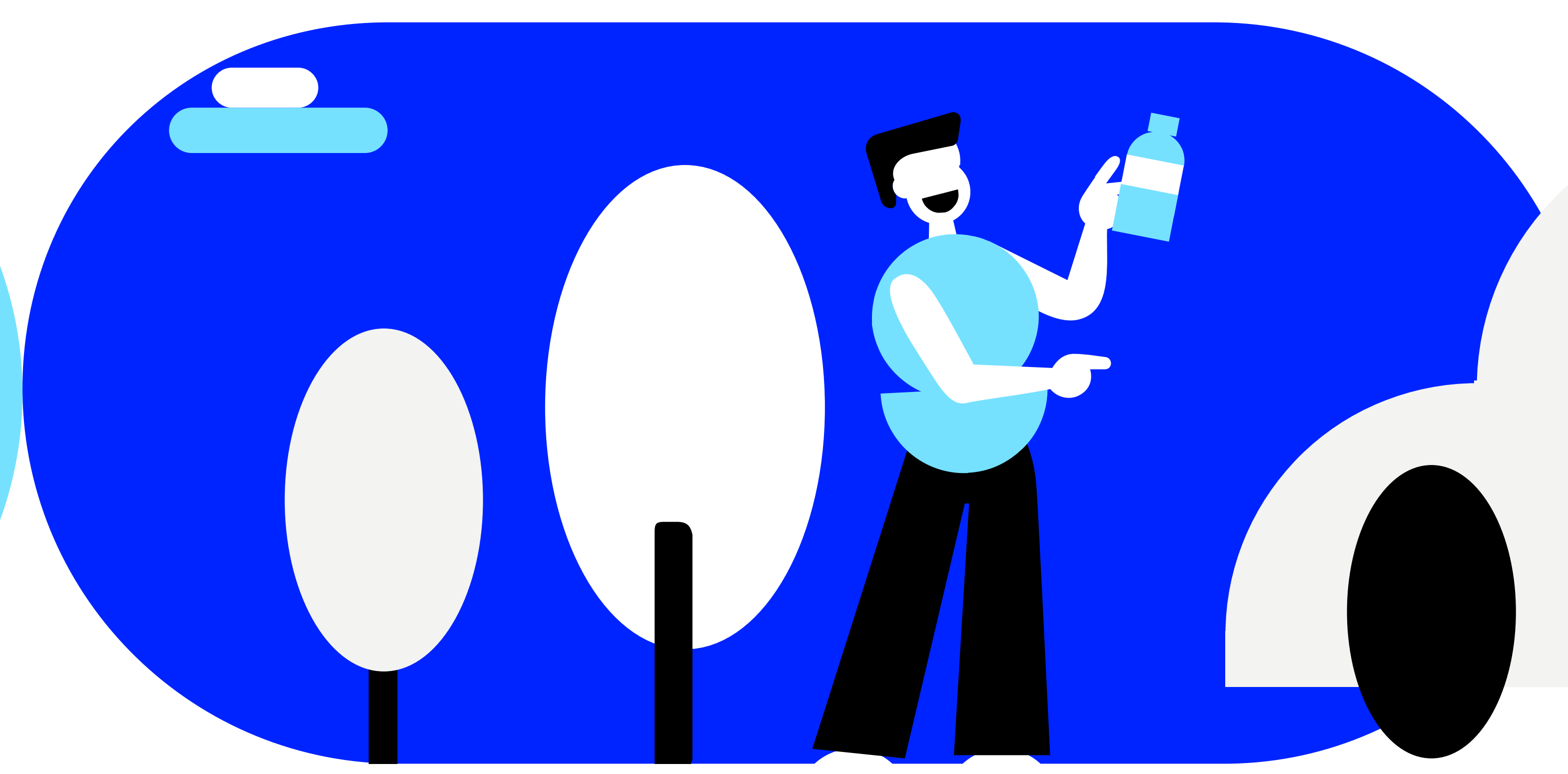
the "want it, gotta get it" crew on a single-minded mission

> "I was relaxing watching TV and realized I wanted my favorite Doritos and a chocolate bar, so I quickly popped out to [my local c-store.]"

stretch break

travelers on a journey making pitstops to unwind

> "We were on a long drive back from the airport when my son needed a bathroom break. I picked up a soda and walked around."



grab for later

thoughtful planners shopping for a later occasion

> "I was thinking ahead to a relaxing night and realized it would be great to pick up a big bag of Lay's and some fruit to have on hand."

It's important to note that while **each of these shopper needs segments varies in size from 7% to 16%** of c-store trip types, **some of the smaller segments may be the mightiest due to larger basket sizes.**

Now let's focus on two high value yet very different segments at more length.

4. drilling down on two needs

Stretch Breaks and Grab for Later are maximally different on several dimensions from older vs. younger shoppers, unplanned vs. planned, all the way to sizes of products and moments of consumption. But they both represent high c-store value, especially in the food & beverage space.

stretch break	attribute	grab for later
Recharge & reset on the go	**Trip Purpose**	Stocking up on snacks & drinks
Smaller baskets, lower spend	**Basket Size**	Bigger baskets, higher spend
Older travelers in groups (Gen X & Boomers)	**Demographic Skew**	Younger value-seeking individuals (Gen Z & Millennials)
Morning & mid-afternoon	**Primary Daypart**	Late evening & night
Single-serve, grab-and-go	**Packaging**	Multi-pack & multi-serve
Consumed immediately, in car, at pump, or at station seating	**Consumption Context**	Consumed later at home or work
Mostly unplanned purchases	**Planned vs. Unplanned**	Mostly planned stock-up with some deal-driven unplanned buys

Now, **let's break down these two segments even further**, by looking at shopper behavior before and during these trips.

By understanding the needs at the heart of these different trips and shopper types, we can be far more intentional with the assortment and marketing tools we use as levers to better serve customers.

stretch break

Pre-Shop Levers

Think about your last road trip. While stretch breaks may seem spontaneous or unplanned stops for solitary drivers, they're **more likely to be traveling with adult family members** (130 index).

So how do you cater to these caravans before they've even reached your pitstop? **Offer phygital solutions** (e.g., buy online, pick-up-in-store, or in-app deals) to engaged passengers who serve as "navigators" to capitalize on the social nature of Stretch Breaks.

And don't forget loyalty and deals. **Stretch Break shoppers over index on checking loyalty points in the store's app** (122 index), looking for **coupons, discounts or deals** at the store (120 index).

During Shop Levers

While on their stretch breaks in store, make sure to highlight **mid-morning promotions and assortment** (e.g., mid-morning appropriate snacks) since Stretch Break trips **over index in mid-morning** (120 index).

Chances are they'll be hungry or thirsty and looking for a store to fulfill that need. **Prioritize CSDs, water, coffee, and energy drinks along with ready-to-eat snacks (sandwiches, bars)** which are among their top items purchased. Then **offer bundles** (e.g., drink + snack) and **BOGOs** to delight the multiple people likely to be traveling with them.

While 34% of Items purchased by this segment tend to be **located in refrigerated doors** (112 index), consider **using signage and strategic points of interruption to encourage browsing** beyond the refrigerated section. Then wish them bon voyage on their continued adventure!

grab for later

Pre-Shop Levers

Grab for Later shoppers tend to be **planners actively thinking about the future**. They're having some friends over to watch the show or prepping for an all-nighter and thinking through how to make the most of it.

Since they don't need it right away, they're most likely to **engage in value-seeking pre-shop research such as checking their household inventory** (138 index), **making a shopping list** (127 index), and looking for deals before shopping at the store (131 index).

These shoppers are **more likely to engage in value-seeking planning. Make value plays** (i.e., coupons, discounts, and deals) **discoverable pre-shop** to encourage visits. Use in-app and **online advertising** to keep your promotions top-of-mind as shoppers search for deals and think ahead to their purchases.

And tailor **marketing activity to these shoppers for nighttime and later** in the week since their trips **over index late evening** (132 index), **late night** (156 index), **and Sundays** (113 index).

During Shop Levers

Once they're in store, lean into **in-aisle activations** (e.g., on-shelf signage or tags), as shoppers who are grabbing for later are **more likely to source items in-aisle** (140 index). Displays and activity near product staples may reach shoppers who are buying essentials for later.

Their **main reason for shopping is to buy food** (140 index) **or beverages** (138 index) **for later.** And that's why they're more likely to be buying **snack multipacks and bottled/canned beverages**. So leverage BOGOs and discounts on multiple items to help this type of shopper achieve their mission since they tend to be buying more items than the average c-store shopper. For example, they're far more likely to be **purchasing multi-pack** (152 index) **or multi-serve packaging** (144 index).

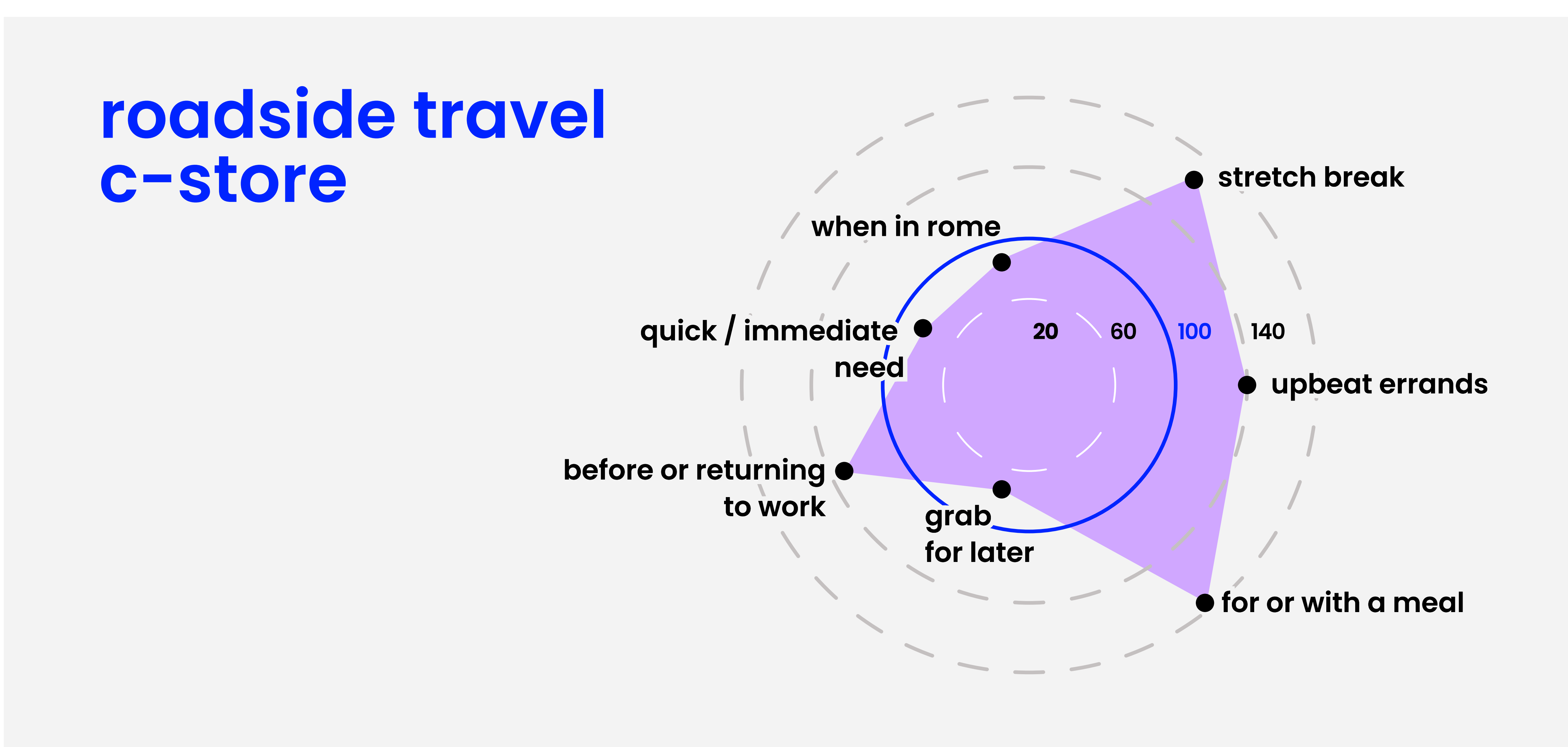
Now that they're stocked up and ready to take on their planned occasion, they can look back grateful that you helped make it a success.

5. every store is different

Of course, every shopper will display many of these needs at some point, engaging in many different trips. Conversely, no store serves just one need, but a constellation of needs in different mixes. Viewed together they reveal the hidden picture behind any given store's mix of trips.

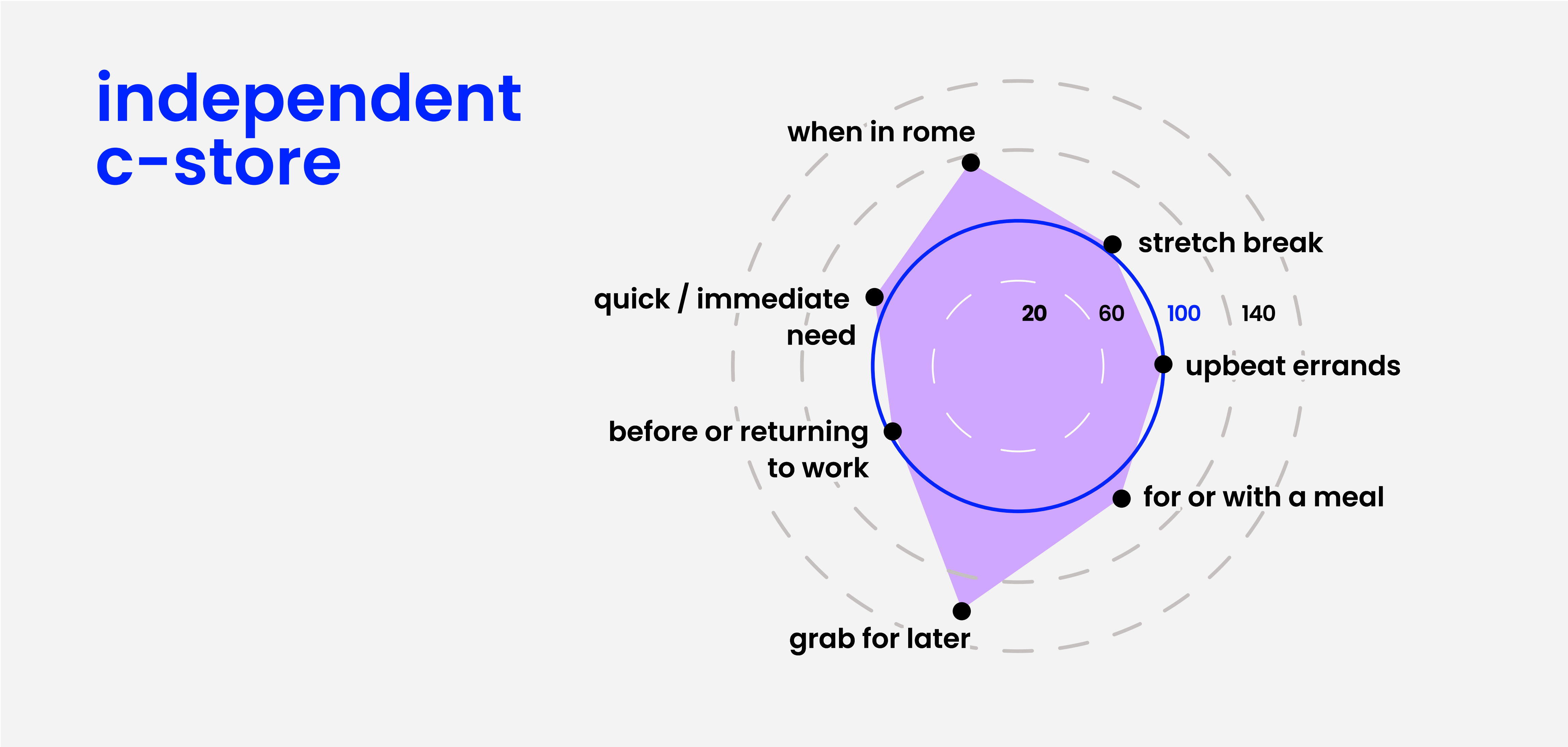
Typical Roadside Travel C-Store

For example, looking at **a typical roadside c-store serving primarily travelers,** we can see that, as we may expect, it **significantly over-indexes on Stretch Break** (155 index)**.** But it's also the place where **For or With a Meal** shows up in even greater force (149 index). If you're looking for **Grab for Later shoppers , on the other hand, it's less likely you'll find them here.** . (70 index)



Typical Independent C-Store

Conversely, your typical **"independent" c-store, like a bodega, is the place to Grab for Later** (155 index). But less so for more "on the go" and "in between" occasions like rest stops, running errands, or popping in before or after work (all near or under 100 index).



Then again - and this is perhaps the most important point - **the variation within a type of channel** like "independent" **can itself be very wide.** Few c-store chains or individual stores are "typical" so an urban bodega near high-density office space vs. a suburban independent near a university might attract very different mixes of shopper needs.

We can realize the full power of this segmentation when we look at the relative mix of these seven shopper segments across real world stores. Combining our **custom c-store shopper segmentation data** with our **proprietary database of consumer data** from over 100 million households (ConsumerDNA) and **insights from over 500,000 retail partners** (StoreDNA) we can arrive at **a higher resolution understanding of shopper needs across many different c-store locations.**

6. let's chart your own needs

We hope that this discussion has shed some light on the **diversity of shopper needs driving c-store trips** and the wide mix of different needs that combine to illuminate the bigger, more nuanced, and often hidden picture behind total trips and sales.

The best way to **map out your own c-store needs across your stores or identify differences between stores** is to reach out to your PepsiCo representative to start a conversation. We're excited to offer you **custom snapshots of your own c-stores' shopper needs mix** and partner with you to create **strategic recommendations specifically tailored to their unique trip drivers.**

We hope to hear from you soon!

Visit us to learn more at [www.pepviz.com.](www.pepviz.com)

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