

Report Price: £3695 | \$4995 | €4400

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

# This report looks at the following areas:

- The continued effect of COVID-19
- Loyalty program membership and appealing features
- The importance of variety and quality of foodservice options
- The impact of fuel prices on foodservice sales
- Strategies for engaging consumers with foodservice programs

Only 47% of consumers are members of a c-store loyalty program, but men and parents are among the demographics more likely to be members. Heightened interest in convenience and value drive these groups, but both are something that almost all consumers can get on board with, making loyalty programs an opportunity for attracting consumers to c-store foodservice.

Inflation will be felt at the c-store inside and at the pump, with rising gas prices particularly painful to consumers who are already struggling, as gas is often a necessity. Consumers may find themselves less willing, or able, to pay for convenience when food prices are steadily rising.

Product shortages and labor shortages are a threat to c-stores as both can complicate the convenience element of the store. If consumers can't reliably find what they want, or if stores have to reduce hours because of a lack of employees, consumers may find themselves reducing their c-store visits.

Opportunity, then, comes from doubling down on convenience and potential savings. Again, loyalty programs are a win if those programs are easy to use. Prepared foods that are complete meals or are bundled with other foods and drinks to create a complete meal make c-store foodservice relevant outside on-the-go eating. Finally, delivery is an ultra-convenient option that keeps c-stores top of mind; tying delivery to rewards creates additional value.



"C-store foodservice is in a unique position, as it must first consider how gas prices will affect foot traffic. Loyalty programs are an important tool in connecting in-store purchases to paying less at the pump."

– Michele Scott, Senior Analyst

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	s +1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100

## Report Price: £3695 | \$4995 | €4400

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



### **Table of Contents**

## **OVERVIEW**

- What you need to know
- · This Report looks at the following areas
- Definition
- Market context
- COVID-19: US context
- Economic and other assumptions

#### **EXECUTIVE SUMMARY**

- Top takeaways
- Market overview

Figure 1: Total US sales and fan chart forecast of convenience store foodservice sales, at current prices, 2016-26

• Convenience, loyalty define the future of c-stores

Figure 2: Convenience store foodservice category outlook, 2022-27

- Opportunities and challenges
- Loyalty programs have room to grow

Figure 3: Loyalty program membership, 2021

Visits return to pre-pandemic numbers

Figure 4: Types of convenience stores visited, 2020-2021

Gas discounts offer biggest opportunity

Figure 5: Reasons for joining a loyalty program

- Shortages create problems
- Make coffee competitive

Figure 6: Attitudes about convenience stores

Key consumer insights

#### MARKET SIZE AND FORECAST

COVID-19 continues to disrupt in different ways

Figure 7: Total US sales and fan chart forecast of convenience store foodservice sales, at current prices, 2016-26

Figure 8: Total US sales and fan chart forecast of convenience store foodservice sales, at current prices, 2016-26

### **SEGMENT PERFORMANCE**

Prepared food rebounds; other segments struggle

Figure 9: Total US convenience store foodservice sales and forecast, by segment, at current prices, 2016-26

## What's included

**Executive Summary** 

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

# Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100

#### Convenience Store Foodservice - US - 2022

## Report Price: £3695 | \$4995 | €4400

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



Figure 10: Total US convenience store foodservice sales and forecast, by segment, at current prices, 2016-26

#### **MARKET FACTORS**

- Labor shortages hit foodservice hard
- Supply chain disruptions
- Mergers, acquisitions and closings (oh my!)
- Demand for gas impacts c-stores
- Food access impacts who shops at c-stores

#### **COMPETITIVE STRATEGIES AND MARKET OPPORTUNITIES**

- Teach consumers how to hack the coffee program
   Figure 11: Speedway Instagram coffee recipe
- · Plant-based scratches the BFY and indulgent need
- Retail can supplement foodservice
- Cobranding opportunities add a flavorful spin to classic items

Figure 12: J&J Pretzel Fillers new flavor

- See-through packaging aids in ingredient transparency
   Figure 13: Wawa see-through packaging
- C-stores must deliver on convenience

# THE CONVENIENCE STORE CONSUMER: FAST FACTS

- Fact #1: Convenience store foodservice cannot ignore gas.
- Fact #2: Loyalty programs have room for growth, but must maintain the "c" in c-store
- Fact #3: C-store visits have returned to pre-pandemic levels

#### TYPES OF CONVENIENCE STORES VISITED

- Gas remains the foundation of c-stores
  Figure 14: Types of convenience stores visited, 2020- 2021
- Convenience is king for men
   Figure 15: Types of convenience stores visited, by gender,
   2021
- Food deserts change c-store habits
   Figure 16: Types of convenience stores visited, by race, 2021

#### **FOODS AND BEVERAGES PURCHASED**

- C-stores are not always made for made-to-order
   Figure 17: foods and beverages purchased, 2020-2021
- Win women over with packaged food and self-serve beverage bundles

Figure 18: Foods and beverages purchased, by gender, 2021

## What's included

**Executive Summary** 

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

# Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100

#### Convenience Store Foodservice - US - 2022

## Report Price: £3695 | \$4995 | €4400

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



Fresh, packaged foods appeal less to White consumers
 Figure 19: Foods and beverages purchased, by race, 2021

#### MOTIVATION FOR FUTURE VISITS

 Gas rules; quality and selection in-store follows further behind

Figure 20: Motivation for future visits, 2021

• Tastes evolve with age

Figure 21: Motivation for future visits, by age, 2021

#### LOYALTY PROGRAM MEMBERSHIP

Consumers are split on loyalty

Figure 22: Loyalty program membership, 2021

Mid-aged consumers show their loyalty

Figure 23: Loyalty program membership, by age, 2021

· Parents need convenience, savings

Figure 24: Loyalty program membership, by parental status, 2021

#### **REASONS FOR JOINING A LOYALTY PROGRAM**

Gas, ease, draw consumers in

Figure 25: Reasons for joining a loyalty program, 2021

Ease is universal; what rewards apply to is not

Figure 26: Reasons for joining a loyalty program, by race, 2021

# MOTIVATION TO JOIN REWARDS PROGRAM IN THE FUTURE

Motivations mirror reasons for current use

Figure 27: Motivations to join a rewards program in the future, 2021

· Race interest translates to reasons for use

Figure 28: Motivations to join a rewards program in the future, by race, 2021

Life stage impacts rewards needs

Figure 29: Motivations to join a rewards program in the future, by age, 2021

# ATTITUDES ABOUT CONVENIENCE STORES

Consumers don't have strong opinions about c-stores

Figure 30: Attitudes about c-stores, 2021

Healthy and indulgent offers can coexist

Figure 31: Attitudes about c-stores, by gender, 2021

Non-White consumers more opinionated about c-stores

Figure 32: Attitudes about c-stores, by race, 2021

## What's included

**Executive Summary** 

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

# Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100

#### Convenience Store Foodservice - US - 2022

## Report Price: £3695 | \$4995 | €4400





#### ATTITUDES ABOUT C-STORE LOYALTY PROGRAMS

Membership programs work

Figure 33: Attitudes about c-stores loyalty programs, 2021

Women influenced by forces beyond purchases themselves

Figure 34: Attitudes about c-stores loyalty programs, by gender, 2021

Gas cost, potential savings more impactful with age

Figure 35: Attitudes about c-store loyalty programs, by age, 2021

#### APPENDIX - DATA SOURCES AND ABBREVIATIONS

- Data sources
- Sales data
- Forecast
- Consumer survey data
- Abbreviations and terms
- Abbreviations

#### APPENDIX - THE MARKET

Figure 36: Total US convenience store foodservice sales and forecast, at inflation-adjusted prices, 2016-26

Figure 37: Total US convenience store sales and forecast of prepared food, at inflation-adjusted prices, 2016-26

Figure 38: Total US convenience store sales and forecast of hot dispensed beverages, at inflation-adjusted prices, 2016-26

Figure 39: Total US convenience store sales and forecast of cold dispensed beverages, at inflation-adjusted prices, 2016-26

Figure 40: Total US convenience store sales and forecast of frozen dispensed beverages, at inflation-adjusted prices, 2016-26

# What's included

**Executive Summary** 

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

# Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

	Visit	store.mintel.com
	EMEA	+44 (0) 20 7606 4533
	Brazil	0800 095 9094
	Americas	+1 (312) 943 5250
	China	+86 (21) 6032 7300
	APAC	+61 (0) 2 8284 8100



# **About Mintel**

Mintel is the **expert in what consumers want and why.** As the world's leading market intelligence agency, our analysis of consumers, markets, product innovation and competitive landscapes provides a unique perspective on global and local economies. Since 1972, our predictive analytics and expert recommendations have enabled our clients to make better business decisions faster

Our purpose is to help businesses and people grow. To find out how we do that, visit mintel.com.