

The New Convenience Battleground: C-store Trends Shaping 2026

Intouch Insight 2026 C-store Trends Report

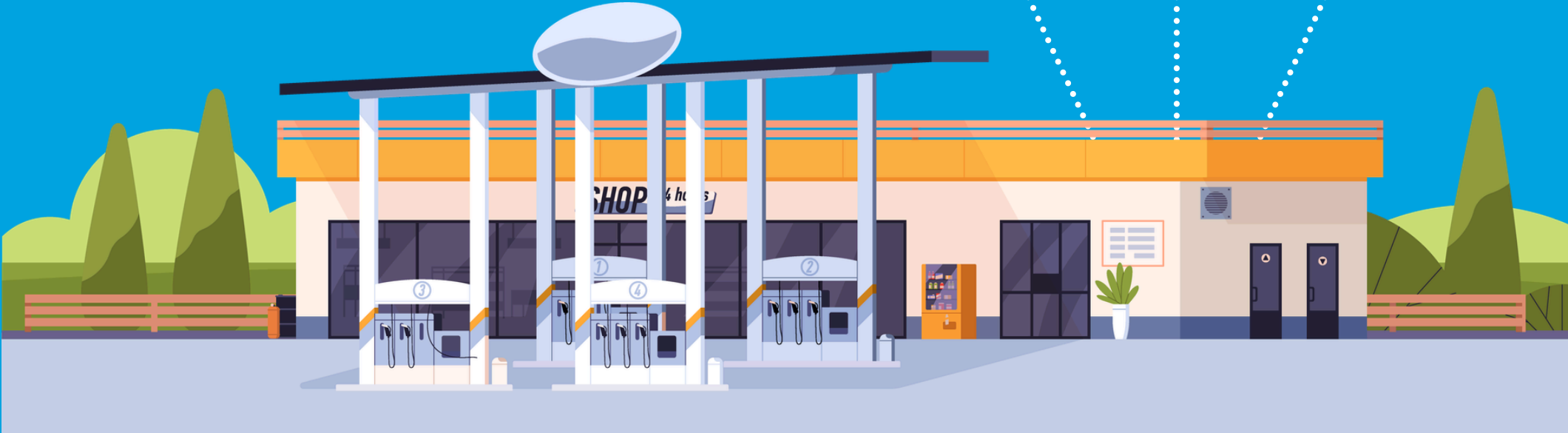


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About the Report

The "gas-and-go" era has officially hit the rearview mirror. For the industry's operators looking to push the envelope, this is your roadmap to the future, decoding the radical shifts set to redefine market dominance in 2026.

The bar hasn't just been raised; it's been reinvented. These fresh insights are the fuel brands need to accelerate past expectations today and lead the charge into tomorrow.

Where the Data Comes From

Consumer surveys: Data-driven analysis draws from 2026 consumer studies focused on food preferences, emerging categories, health priorities, technology perceptions, and evolving c-store formats.

Mystery shopping & audit: Findings from intensive studies across major U.S. convenience brands provide a high-performance snapshot of service and operational execution.



WANT TO SEE HOW THESE TRENDS ARE PLAYING OUT IN YOUR STORES?

Industry trends are only part of the story. Mystery shopping and audits help uncover how well your locations are executing against evolving customer expectations, operational standards, and emerging market shifts.

[Contact Us to Learn More →](#)



INTRODUCTION

The Future Starts Here

In 2026, c-stores are being redefined by a broader set of customer missions: meals, beverages, wellness, charging, community, and everyday value. As these missions become more complex to serve, operators will need better intelligence (including AI-enabled tools) to anticipate demand, personalize experiences, manage execution, and identify gaps across locations.

And no wonder. The U.S. convenience store industry commands immense economic influence, with total sales reaching \$817.5 billion across a robust footprint of 151,975 nationwide locations in 2025.¹ A historic transformation is underway inside these stores, marking the 23rd consecutive year of in-store sales growth at \$341.2 billion. This momentum is aggressively driven by foodservice, which now accounts for 28.5% of total in-store sales. Propelled by a 73.9% dominance in prepared foods like pizza and sandwiches, alongside a 7.9% surge in protein-focused alternative snacks, c-stores have solidified their role as primary dining destinations.²

The next era of convenience will be defined by **six converging trends** that fundamentally change the store's mission:

Trend 1: *Foodservice Continues to Raise the Bar*

Trend 4: *The Emergence of Experience-Led Formats*

Trend 2: *Growing Beverage Programs*

Trend 5: *The EV Transformation of the Forecourt*

Trend 3: *A Shift Towards Health and Trust*

Trend 6: *Consolidation & Consistency*

Trend 1: Foodservice Continues to Raise the Bar

C-stores are continuing to become the made-to-order food competitors, not just convenience retailers

The lines aren't just blurring; they're disappearing. C-stores are now the ultimate food disruptors, continuing to take on QSRs and restaurants with speed, quality, and undeniable accessibility. What started as a spark in our 2022 report has become a wildfire, with brands doubling down on the strategic power of fresh, high-quality menus.

Lines continue to blur between c-stores and QSRs

The line between c-stores and fast food is pretty much gone. Convenience stores are winning over hungry customers by being fast, easy to find, and actually serving good food for the price. We're seeing a massive spike in people grabbing breakfast and lunch at their local shop, likely because everyone's back in the office and looking for a quick, cheap bite.³

Look at RaceTrac: they dropped \$566 million to buy Potbelly in late 2025, taking over nearly 450 sandwich shops. That's a huge signal that c-stores aren't just adding a few snacks; they're moving right into the restaurant business. Don't be shocked if we see more of this in 2026, especially since analysts think struggling restaurant chains are prime targets for c-store takeovers.⁴



Signature items anchor customer loyalty

In the battle for customer loyalty, proximity is no longer enough. We know that MTO food is a table stake, with the number of U.S. shoppers having tried it at a c-store up 4% from last year. In 2026, the real currency is an exclusive, craveable item that turns a casual stop into a dedicated trip. This is the power of a signature menu item: it creates a must-have reason to choose one brand over the one next door.

Distinctive food and beverage items give customers a reason to choose a specific brand, not just the nearest location. Intouch Insight's survey data also found that 58% of consumers are likely to choose a brand over a closer competitor because of exclusive food items. Unique offerings like Casey's Breakfast Pizza, Wawa's Custom Hoagies, and 7-Eleven's Slurpee demonstrate how proprietary, exclusive items can create a loyalty barrier that proximity alone cannot replicate.

Global flavours and Asian-inspired c-stores gain relevance

Global flavours and the growing popularity of Asian-inspired c-stores show that MTO food is not only becoming more competitive, but also more differentiated and culturally influenced. Korean and Asian-inspired formats are blowing up in the U.S., fueled by K-culture buzz and hunger for affordable, high-quality fresh items such as gimbap, musubi, and rice bowls.⁵

Asian brands like CU are entering into the U.S. market and chains such as Busan Mart and Seoul Station are also expanding.⁶ Why? Because operators note that the complexity of opening an Asian-inspired c-store is lower than opening a full grocery store.⁵ This is a young person's game: Gen Z and Millennials are far more interested in global flavors than Boomers are. Case in point: a huge 13% of Gen Z are interested in stuff like Tajin at C-stores, compared to a tiny 2% of Boomers. This generational flavor gap is huge.³



of people said they were interested in purchasing **international or culturally diverse food profiles** from a convenience store.

N=1186



AI: the new kitchen assistant

Going head-to-head with fast food isn't easy, and keeping food fresh and consistent at scale is even tougher. That's where AI steps in. By handling the heavy lifting (like predicting lunchtime rushes and optimizing staff schedules) AI can play a role in helping operators cut down on waste and making sure popular items are always in stock.

It's not just about math; it's about safety too. Brands are already using AI to spot temperature risks or food left out too long. Think of AI as a way to speed up your reaction time, though it still needs a human touch and real-world checks to get the job done right.

Trend 2: Growing Beverage Programs

Beverages are becoming a destination category

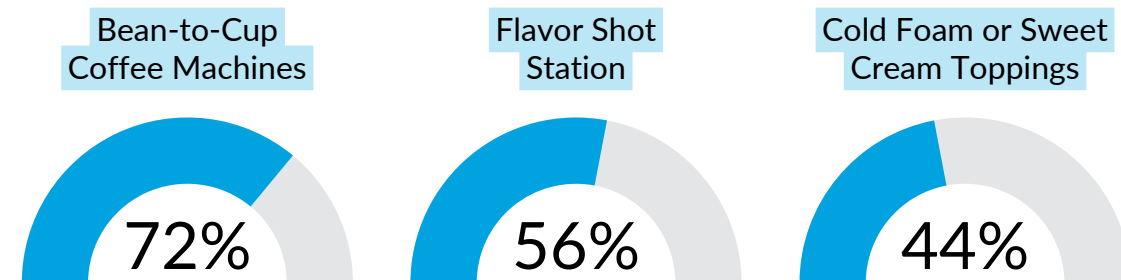
Beverage programs are moving from add-on purchases to deliberate traffic drivers. In 2026, customization, innovation, and signature drink experiences can help c-stores compete for repeat visits independent of fuel or food.

Beverage innovation will be a major focus

Only 6% of people surveyed think of a convenience store first when they want a specialty drink, but beverages are expected to become a destination in 2026, with innovation in a variety of categories. Industry experts say retailers increasingly want to be known for beverages, not just for fuel or convenience.⁴

Q: Which of the following beverage features or options did you observe?
(Select all that apply)

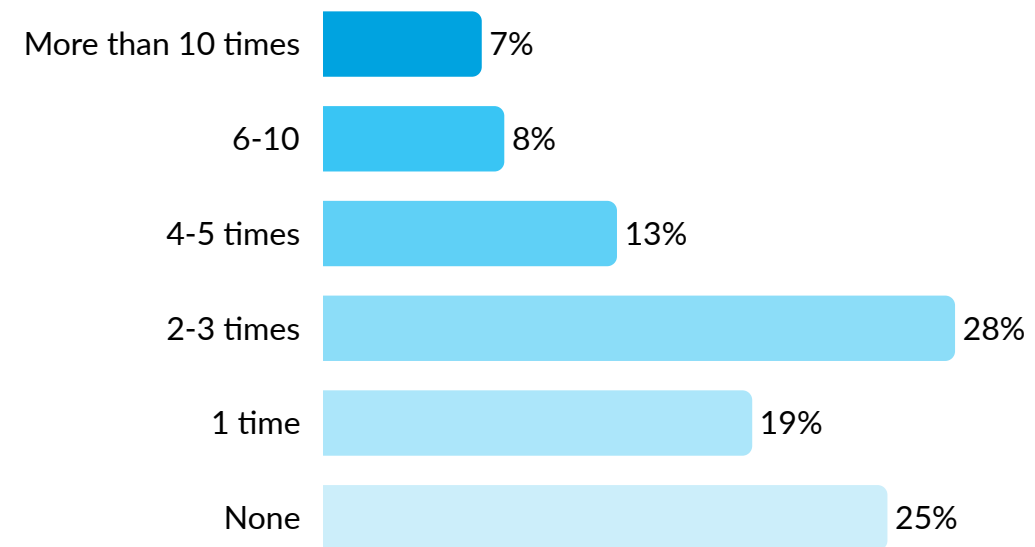
TOP 3 ANSWER RESPONSES



N=1276

This differentiation is driving customers to visit c-stores specifically to purchase a beverage, independent of the traditional reasons like food or fuel.

Q: In the past 30 days, how many times have you visited a convenience store primarily to buy a beverage, without purchasing fuel or snacks?



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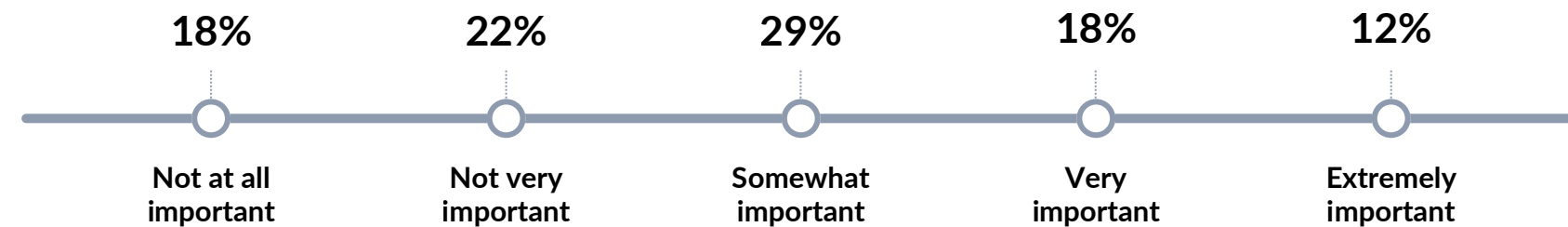


Customers expect beverage customization

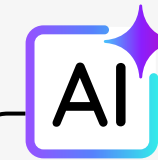
Standard drinks are no longer enough; an increasing number customers are now demanding customized experiences across coffee, soda, frozen, and energy categories. A recent Intouch Insight survey uncovered that 59% of consumers found the ability to customize their drink as important.

The "dirty soda" phenomenon proves this shift: while traditional soda sales remain stagnant, this customizable market is surging at 42% and is projected to top \$70 million.⁷ For today's consumer, the ability to tailor a drink isn't just a perk; it's the primary draw.

Q: When purchasing a beverage at a convenience store, how important is it that you have the ability to customize your drink (such as adding flavor shots, choosing ice types, or mixing options)?



N=1186



AI-enabled beverage personalization

As customization becomes the standard, AI is helping operators turn data from loyalty programs, transactions, and dayparts into personalized drink offers and smart add-on recommendations. These tools allow brands to test flavor combinations and adapt menus in real time based on location, customer segment, and time of day. Some have even begun working with AI technology companies to operationalize AI-driven loyalty across their footprints. The impact is significant: AI-enabled programs can drive a 20-50% increase in guest lifetime value compared to traditional points-based systems.⁸



of consumers surveyed in an Intouch Insight poll would **likely join a loyalty program that offers personalized rewards based on their shopping habits.**

N=1280

Trend 3: A Shift Towards Health and Trust

Health, balance, and trust are reshaping convenience

The convenience consumer no longer views health and indulgence as a binary choice. By 2026, the demand for portion control, high protein, and radical transparency must coexist with the need for speed.

Leading operators will move beyond simple product swaps to deliver 'credible convenience': menus that are fresh, functional, and fast, without sacrificing the satisfaction of a treat.

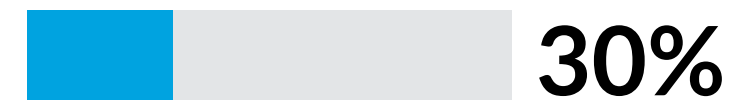
The rise of the GLP-1 customer changes assortment and trip missions

The rise of the GLP-1 customer is rewriting the rules for c-store assortment. This isn't a niche trend; it's a massive shift demanding focus on balance, portion sizes, and health goals. As of early 2026, roughly 1 in 8 U.S. adults reported using GLP-1 medications.⁹

GLP-1 users aren't ditching c-stores; they're just shopping smarter. They want smaller, single-serve items that deliver on freshness, quality, and hydration, actively favoring MTO and packaged food/beverage options over traditional snack categories.¹⁰

What they buy is changing fast: they're loading up on health-focused items like pre/probiotic soda, performance shakes, yogurt, meat snacks, and kombucha, while cutting back on frozen desserts, chips, alcohol, and candy.¹¹ The opportunity is clear: shift the menu to embrace protein-forward snacks, smaller portions, hydration-focused beverages, and "permissible indulgences" that satisfy cravings without derailing health goals.

Q: How has your preference for high-protein options or smaller, portion-controlled food packaging at convenience stores changed over the last 12 months?



of customers have increased their preference for these options.

N=1186



Trust, transparency, and food safety become differentiators

Food safety isn't just a compliance box; it's the bedrock of growth and brand survival. As operators pivot toward full meals and fresh prep, every visible cue becomes a high-stakes test of trust. With only 25% of shoppers currently trusting c-store hygiene standards, the margin for error is zero.¹² To earn that trust, brands must sweat the details: keep the floors clean, maintain the washrooms, and ensure everything is stocked.

The good news? The tide is turning. Roughly 35% of consumers now see quality on the rise, and 33% are noticing improved freshness.³ It's a clear signal that the brands upping their game are finally earning a seat at the table.



AI-supported assortment planning

The GLP-1 wave is a data challenge. Operators need to know where demand is migrating, which health-focused products are actually sticking, and how local preferences for protein and portion size fluctuate. AI maps these patterns, while real-world feedback confirms if the assortment feels like a legitimate solution or just a token health shelf.

AI powers the planning by analyzing loyalty data, market health trends, and product velocity, but the storefront validates the signal. While AI can identify opportunities to personalize the experience, successful execution is what builds customer trust. Data identifies the opportunity, but execution earns the trust.

60% of consumers are comfortable with AI-powered menu recommendations
(Based on past orders or dietary preferences)

N=1201

Trend 4: The Emergence of Experience-Led Format

The c-store format is becoming more flexible and experience-led

The cookie-cutter c-store is fading. Forward-thinking operators are shattering the standard box with tech-infused hubs, expansive food-forward flagships, and high-dwell "third-place" experiences that fundamentally rewrite the customer journey.

Diversification is the new growth engine, but it brings a high-stakes execution challenge. As store missions multiply, success hinges on defining the specific purpose of every format.

Brands are testing new formats to reach more customers on more occasions

Retailers are entering new markets, investing in technology, and stretching their capabilities in foodservice, beverage, operations, and customer experience. New c-stores in 2026 are trending toward larger square footage and more food-forward layouts. Operators including 7-Eleven, Kent Companies, Murphy USA, Rutter's, and Arko Corp. are investing in new formats with expanded foodservice, larger footprints, and enhanced customer experiences.¹³

As c-stores expand their formats and offerings, customers are looking to them to fulfill their increasingly diverse needs.

Q: Aside from purchasing fuel or traditional packaged snacks, what other amenities or service types have caused you to visit a convenience store recently? Select up to three.

TOP 5 ANSWER RESPONSES



54%

Coffee or fountain beverages



52%

Restrooms



27%

Lottery tickets



27%

Prepared foods or fresh meals



26%

Loyalty program offers or app deals

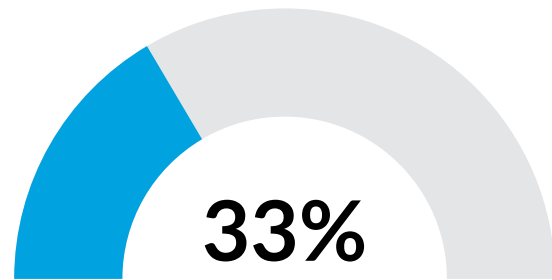
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Nearly
62%
of Gen Z (18-24) would choose a brand specifically over a competitor because of a loyalty program.
N=1280

C-stores could become new third places

The "pit stop" is evolving into a "third place." Forward-thinking operators are ditching the transactional box for high-dwell, social hubs. Rusty Lantern Market in Maine is leading the charge with signature fireplaces, plush lounges, and open kitchens staffed by uniformed chefs.¹⁴ Meanwhile, Rutter's 1747 concept is doubling down on adult leisure, integrating bars, sports tickers, and gaming terminals into the retail floor.¹⁵

This isn't just about aesthetics; it's about capturing the "superusers." While casual drivers just want to get in and out, the 24% of customers who visit multiple times a week are motivated by familiarity and safety, not just discounts. For these loyalists, the store isn't a utility; it's a daily rhythm and a space that finally feels like theirs.¹⁶



33%
of the locations visited had a **designated indoor seating or dining area** available for customers.

N=1282



Image Source: C-Store Dive



AI as part of tech-enabled store design

As brands scale new footprints, AI is moving from the back office to the front line, optimizing staffing, merchandising, and localized demand in real time. This isn't just automation; it's operational intelligence that makes complex formats easier to run and more relevant to every customer mission.

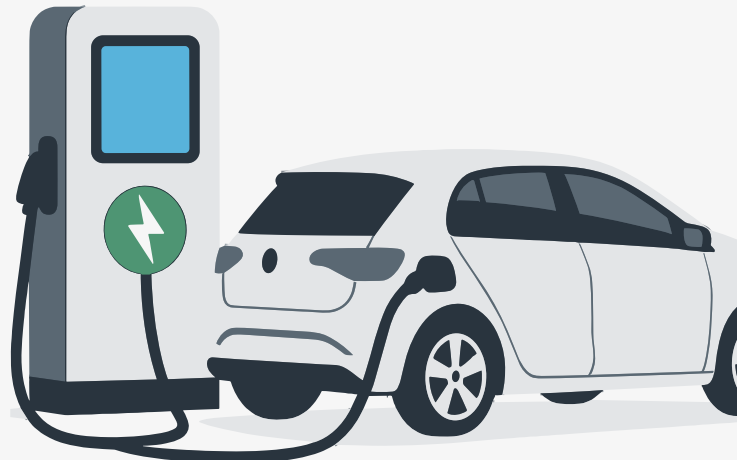
From predictive labor scheduling to menu optimization, AI handles the data so teams can handle the guest. With 40% of food purchases expected to involve digital touchpoints by 2026, the modern store format is no longer just a physical box; it's a digital journey.¹⁷

Trend 5: The EV Transformation of the Forecourt

EV charging changes the forecourt and the in-store opportunity

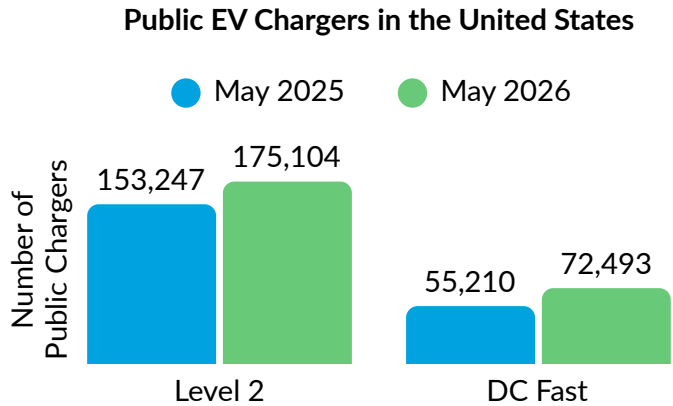
EV charging isn't just a shift in fuel; it's a total rewrite of the customer journey. It transforms dwell time, resets site expectations, and redefines the store's role during every stop.

For operators, this is more than an infrastructure play; it's a high-stakes customer experience opportunity. Winning doesn't happen by simply installing chargers; it happens when the entire stop experience gives drivers a reason to plug in, walk in, and keep coming back.



EV charging is only getting bigger

EV charging is exploding, but it's still playing catch-up with the pump. Only 6% of c-store locations in a recent Intouch Insight audit had EV charging stations. With drivers officially naming c-stores their top choice for a charge, operators have a clear mandate: own the forecourt or get left behind.¹⁸



Source: U.S. Department of Energy, Joint Office of Energy and Transportation

Longer dwell time creates new expectations

For EV drivers, charging is a destination experience, not just a pit stop. With DC fast charging requiring 20 to 40 minutes, the dwell time is a radical departure from the traditional five-minute gas-and-go. This expanded window fundamentally shifts expectations; customers aren't just looking for a plug, they're looking for quality food, clean restrooms, comfortable seating, and reliable Wi-Fi.

This captured audience represents a massive opportunity. EV drivers are significantly more likely to enter the store and spend on prepared meals and impulse items, provided the environment is inviting and the offer is relevant. But the entire journey hinges on one factor: uptime.



AI-enabled EV site optimization

As EV charging takes over the forecourt, AI is the key to turning electricity into engagement. This shift is driven by a clear consumer preference:

27% of surveyed consumers would be more likely to choose a retail location over another if it had an EV charging station.

For operators, it's no longer just about keeping chargers online through predictive maintenance; it's about mastering the "dwell" and leveraging it as a competitive differentiator.

The real win for c-stores lies in connecting charging performance to the in-store journey. By using AI to forecast traffic by daypart, operators can sync food and beverage deals with specific charging windows, optimize restroom and lounge maintenance in real-time, and pinpoint exactly which experience variables turn a charging session into a high-value store visit.

N=1280

Trend 6: Consolidation & Consistency

Consolidation and new growth models increase the need for consistency

Growth, mergers, and acquisitions are creating massive networks, but they're also creating a massive consistency gap. As brands scale across new markets and formats, the distance between strategy and reality grows.

In this more complex environment—defined by food-forward menus, EV charging, and AI—consistency is the new competitive edge. The larger the network, the more individual store execution determines whether your investment actually reaches the customer.

The consolidation continues

Consolidation dominated the 2025 c-store narrative and is expected to continue in 2026, especially as smaller and mid-sized operators face pressure from larger competitors with stronger economies of scale. Rising expenses, labor pressure, and declining fuel-margin support are pushing many operators toward either acquisition-led growth or sale.

The headline 2025 deal was Sunoco's \$9.1 billion acquisition of Calgary-based Parkland Corp., creating the largest independent fuel distributor in the Americas.¹⁹ Parkland's portfolio adds complexity through Canadian brands, food partnerships, and multi-geography operations. RaceTrac's acquisition of Potbelly adds a different form of complexity: restaurant operations, menu standards, and a new level of foodservice integration.

Each wave of consolidation creates larger and more complex networks that are harder to operate consistently.



AI-supported network visibility

As networks expand and diversify, AI becomes the essential filter for scale: pinpointing outliers, detecting recurring compliance gaps, and prioritizing field resources where they matter most. Growth makes consistency harder to maintain, demanding seamless communication and integrated visibility across every location. AI can accelerate pattern recognition, but its true value is unlocked only when signals trigger an operational response. Data identifies the anomaly, but store-level measurement validates the solution.

Turning trends into execution



These major 2026 trends aren't isolated; they're a unified force demanding flawless execution. They raise the bar on customer expectations, creating a hyper-complex operating environment where execution is the ultimate competitive battleground.

1

The store is becoming more complex to operate

C-stores are now mission-control for everything: meals, beverages, wellness, charging, community, and value. That complexity hits every touchpoint: assortment, staffing, foodservice, equipment, loyalty, forecourt, cleanliness, and the digital experience.

2

Strategy only matters if it reaches the customer

All the shiny new formats, menu innovation, AI tools, and EV investments are worthless if execution fails at the store level. An unavailable MTO food item, a filthy beverage station, or a broken EV charger instantly tank brand investment, no matter how brilliant the strategy is on paper.

3

Measurement needs to reflect the mission

Operators must define "great execution" for every store type and customer mission. A highway location, tech-enabled format, the food-forward flagship –they all need unique standards and audit criteria. A single, universal scorecard is a guaranteed way to miss the details that actually matter.

4

AI helps identify patterns, but it doesn't replace frontline intelligence

AI is a powerful weapon: it spots gaps faster, forecasts demand, personalizes offers, and analyzes feedback at scale. But you still need real-world validation. An AI model can predict higher breakfast sales; a mystery shop confirms if the food is hot, visible, and appealing at 7:30 AM.

5

The winning operators will connect intelligence to improvement

The strongest brands use customer feedback, operational data, AI-driven insight, and frontline measurement as a connected loop. They identify the gap, prioritize the fix, and improve consistently across the entire network. Closing that loop is how you build trust, guarantee consistency, and win in this channel.

The Intouch Advantage

Intouch Insight combines mystery shopping results with real-time guest feedback surveys to give operators a 360-degree view of the customer experience at every touchpoint, from the moment a shopper opens the app to the moment they walk out the door.

The result is a centralized intelligence platform that:

- connects structured mystery shop data (behavioral compliance, timing, accuracy) with unstructured guest sentiment (open comments, star ratings, NPS);
- surfaces location-level patterns that aggregate scores can mask;
- enables proactive coaching with real-time alerts when locations fall below threshold on critical KPIs like order confirmation, parting remarks, or pickup instruction clarity;
- tracks improvement over time with longitudinal benchmarking against prior waves and competitive category averages and;
- turns insights into action with IntouchCheck, giving field teams the checklists, corrective actions, and follow-up workflows they need to close execution gaps at the store level.

The customers' expectations of the c-store in 2026 is high. Brands that want to stay above that bar need more than a report; they need a continuous feedback loop. Intouch Insight delivers that system.

About Intouch

Intouch Insight is a leading customer experience (CX) solutions provider trusted by multi-location brands across North America. Our platform combines mystery shopping, customer surveys, operational audits, and advanced analytics to give operators the real-time intelligence they need to deliver consistent, brand-standard experiences at every location. From petro-convenience, QSR and fast casual to retail, hospitality, and automotive, Intouch Insight helps organizations translate field-level data into measurable business outcomes. **Learn more at intouchinsight.com.**



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