



Image Source: Shutterstock



Technomic's Take: The Consumer Conundrum

Traffic Trend: Conflicting Cues

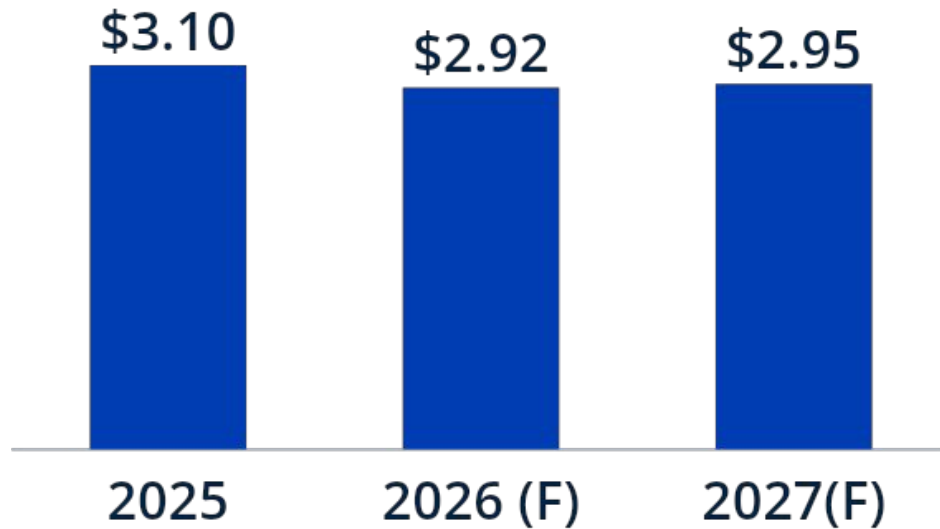
83% of consumers commute to work some or all days of the week

55% of hybrid workers expect to go to the workplace more often in the next six months

Base: 530 consumers who are employed
Source: Technomic Q1 2026 Consumer & Operator Outlook Report

Fuel prices are low—and expected to go lower

AVERAGE COST REGULAR GAS/GALLON

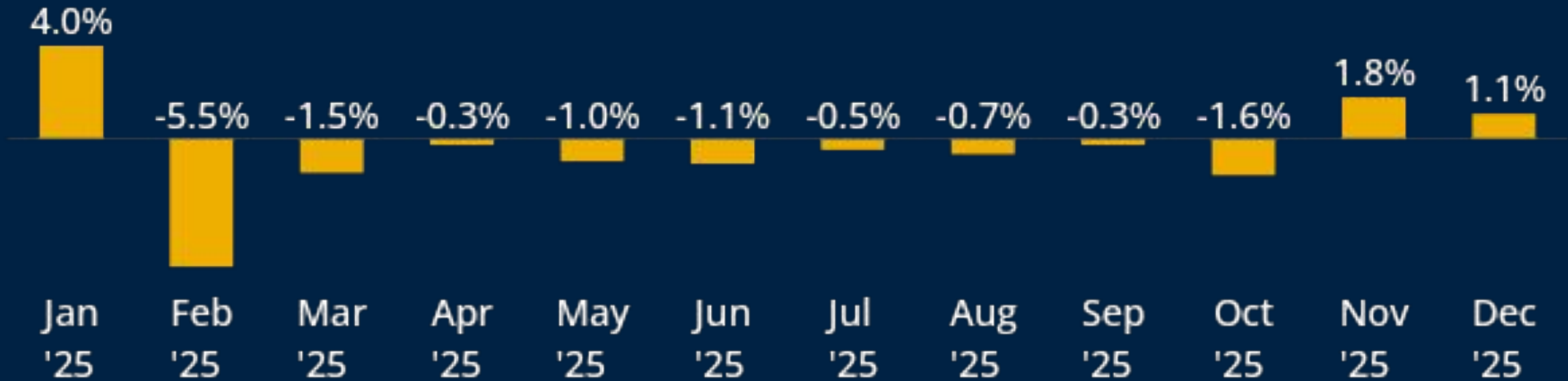


Source: U.S. Energy Information Administration
Note: (F)=forecast
Image Source: Shutterstock



But c-store traffic softened in 2025

YOY CHANGE IN NATIONWIDE C-STORE MONTHLY VISITS
JAN-DEC 2025



84.5

Consumer
Confidence*

68% are
struggling or
just getting
by**

*Source: The Conference Board

*Note: January 2026

**Source: Technomic Q1 2026 Consumer and Operator Outlook Report

Commuting is back and fuel prices low, **but** cost concerns compress visits

Solving for This Conundrum

Pivot from legacy thinking

Recognize that heavy reliance on low fuel prices will not win battle for traffic

Leverage loyalty

Image Source: Shutterstock

Targeted promotions, ultra-personalized incentives

In Demand More for less

TOP ATTRIBUTES WHEN SELECTING A C-STORE FOR FOODSERVICE OCCASION

% IMPORTANT/VERY IMPORTANT

Food quality is now more important than convenience when choosing a c-store

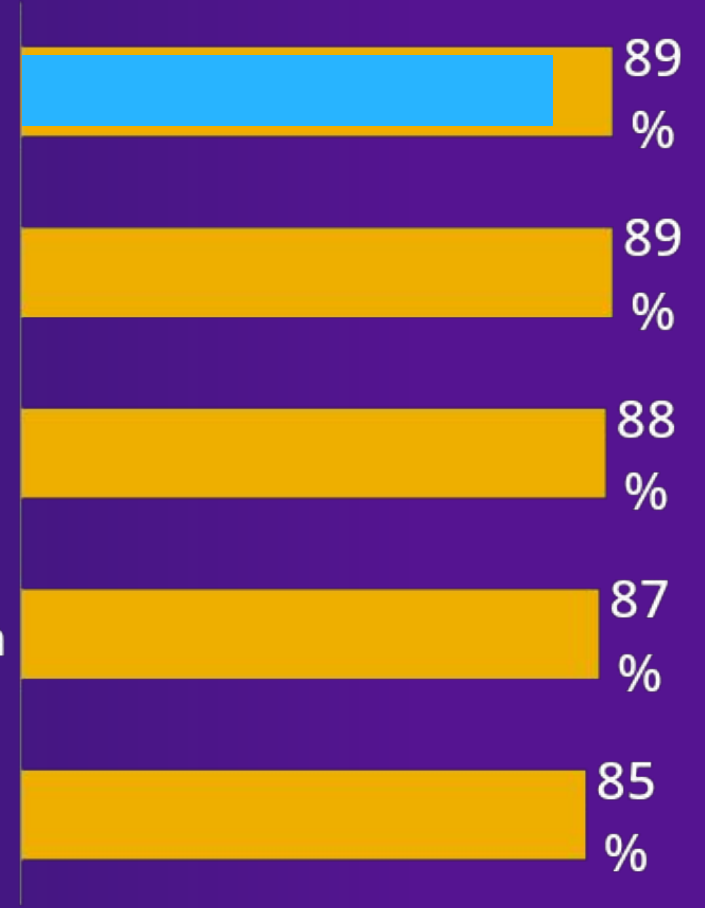
Food quality

Taste/flavor of food

Service is friendly

Convenient location

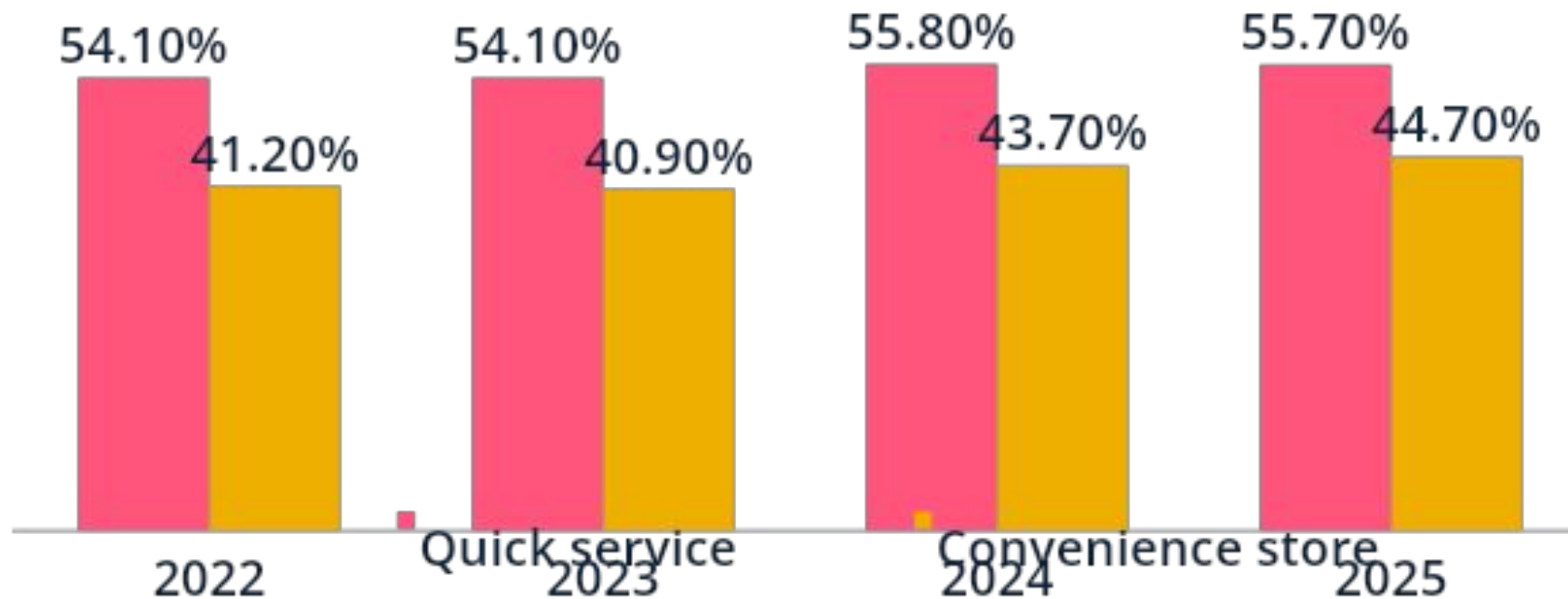
Bathroom is clean



Base: 21,644 convenience-store foodservice patrons
Source: Technomic Ignite Consumer Brand Ratings, Q3 2025
Note: Trailing four quarters shown

Food Quality

SHARE OF RESPONDENTS RATING "EXCELLENT" ON RECENT VISIT



"I think now convenience stores are getting really good at their food. **It's almost like going to a restaurant or fast-food place.**"

- 51-year-old male

Lower prices drive foodservice visits, purchase



39% of consumers agree that c-stores offer **comparable quality at a better price** than other foodservice locations

30% purchase at c-stores because prepared foods and beverages are **less expensive** than other foodservice locations

47% ages 18-24

Base: 1,000 c-store consumers
Source: Technomic Q1 2025 C-Store Market Brief
Image Source: Shutterstock

C-stores win on price

Commodity costs,
PPI, packaging costs
continue to rise

C-store price is ___ less than QSR

39%

23%

14%

20%

32%



**Chicken
Sandwich**

\$7.19 QSR

\$4.36 C-Store



**Cheese
Pizza**

\$15.41 QSR

\$11.84 C-Store



**Bacon Breakfast
Sandwich**

\$4.99 QSR

\$4.29 C-Store



**Regular
Coffee**

\$2.65 QSR

\$2.11 C-Store



**Iced
Coffee**

\$4.02 QSR

\$2.72 C-Store

Source: Technomic Ignite Menu
Note: Average menu prices
Image Source: Shutterstock

Consumers want restaurant quality **but** at c-store prices

Solving for This Conundrum

Callout quality cues

Tout relevant attributes like freshness, ingredients, preparations and brands

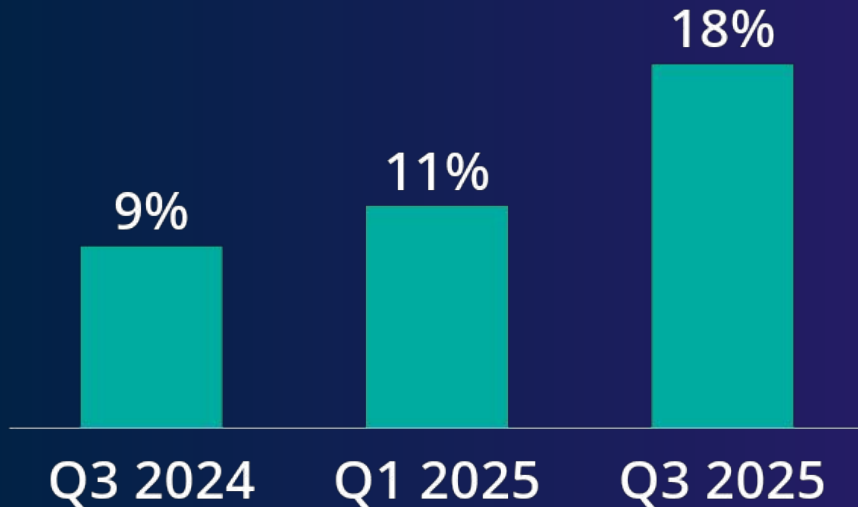
Play up lower prices

Showcase price differential vs. fast food on popular and signature prepared F&B items

Indulgence or Health

Do GLP-1s force the issue?

CURRENT USE



19% of c-store consumers would like to try GLP-1

77% of them expect to do so in the next six months

Base: 530 consumers who are employed
Source: Technomic Q1 2026 Consumer & Operator Outlook Report

GLP-1 usage prompts changes in the way c-store consumers eat

52% purchase **healthier prepared foods** from foodservice locations

39% purchase **healthier prepared beverages** from foodservice locations

47% purchase **healthier packaged snacks** from retail locations

48% purchase **healthier packaged nonalcohol beverages** from retail locations

“Healthier” is:

- Small portions
- High-protein
- High-fiber
- Low-sugar
- Low-carb
- Low-fat
- Nutrient-dense
- Hydrating



Where do consumers primarily source prepared foods that fit their needs while using GLP-1 medications?

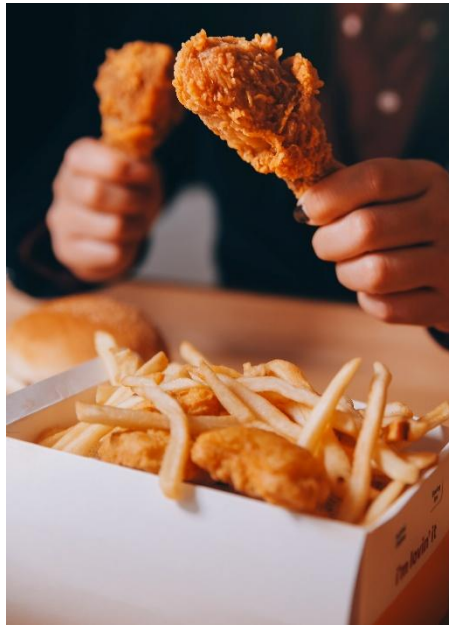
40%

Grocery prepared foods



32%

Fast-food restaurants



26%

Fast-casual restaurants



24%

Coffee cafes



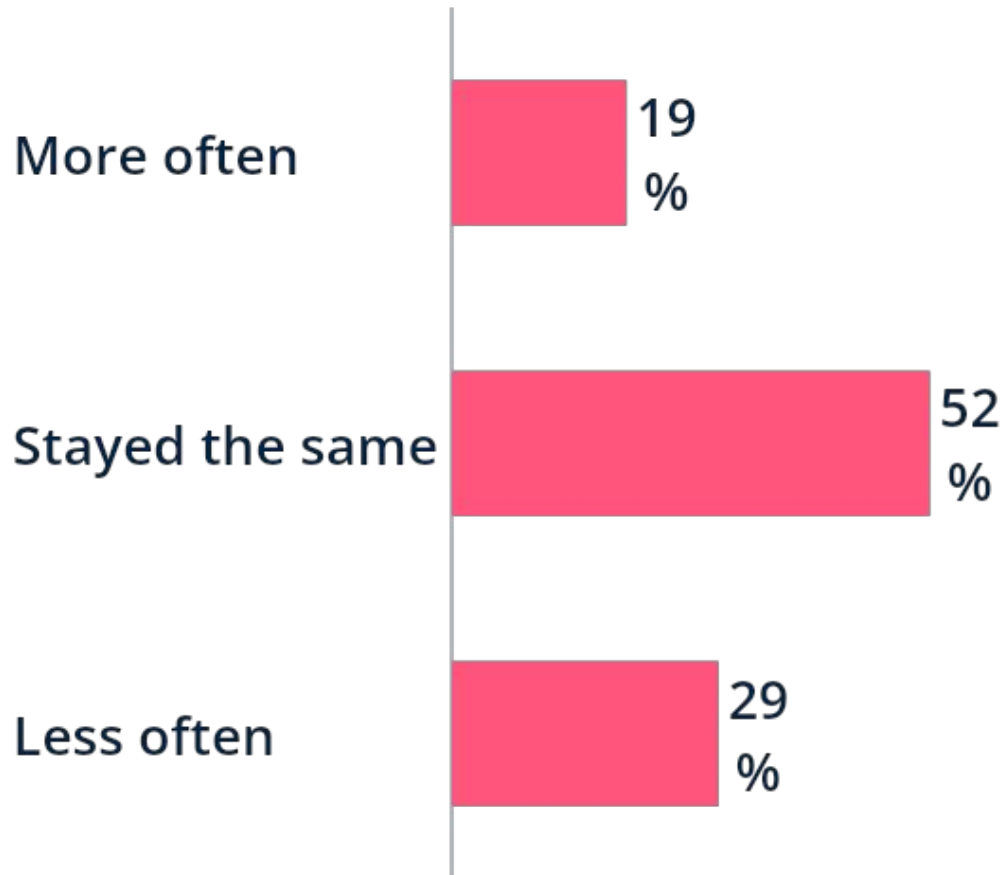
23%

C-store prepared foods



Source: Technomic Q1 2026 Consumer Market Brief
Image Source: Shutterstock

Since using GLP-1 medication, how has consumers' frequency of purchasing foodservice items at c-stores changed?



Source: Technomic Q1 2026 Consumer Market Brief

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Nearly half of c-store consumers say

- Healthier **prepared** foods and beverages
- Healthier **packaged** foods and beverages
- Smaller **portions**

Would increase likelihood of visiting c-stores while using GLP-1s

“I would like breakfast sandwiches that offer buns or bagels that are **high in fiber**. I need quality protein, lean ham and bacon and also eggs. I can currently get the protein, but I would like convenience stores to add the high-fiber breads.”—Male GLP-1 user, age 55-64

“I think having the ability to **order half a portion** of something like a sandwich or half order of biscuits and gravy would help greatly.”—Female GLP-1 user, age 35-44

Are these consumers really that different?

28% of **GLP-1 users** choose healthy food and beverages away from home **"most of the time"**

vs. **37%** "sometimes"

25% of **GLP-1 nonusers** choose healthy food away from home **"most of the time"**

vs. **41%** "sometimes"

Their **definition of "healthy"** is more specific

Source: Technomic Q4 2025 Foodservice Planning Program consumer survey

GLP-1s elevate competitive intensity **but do not require a full overhaul of F&B offerings**

Solving for This Conundrum

Get credit

Highlight high-protein, hydration and high-nutrient attributes on existing retail and foodservice items

Collaborate to differentiate

Develop select foodservice items to appeal to GLP-1 users; advocate for packaged F&B exclusives

THC Beverages Taking Off

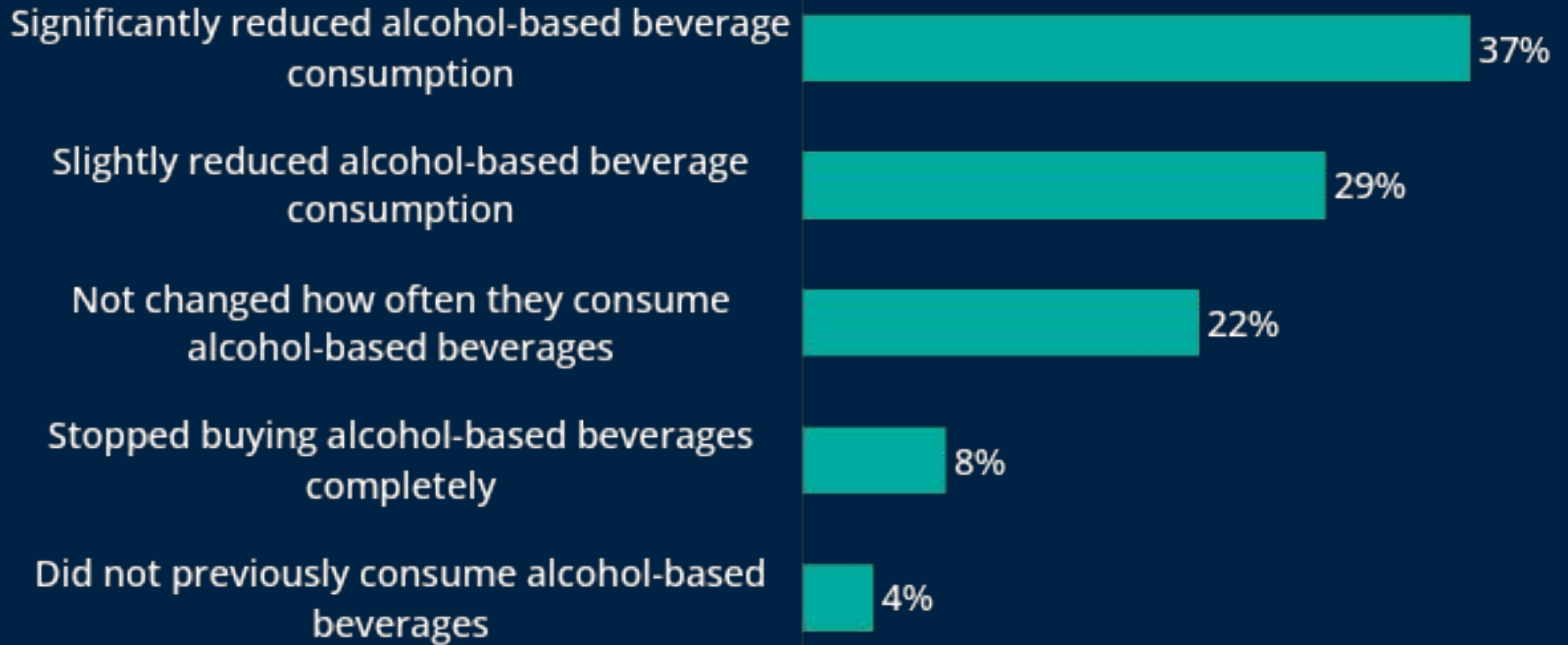
11% of adults drink THC
beverages regularly

- **24%** of 22- to 24-year-olds
- **40%** of 25- to 44-year-olds

Source: Technomic October 2025 consumer survey
Note: Consumers ages 21+ in states where THC beverages are legal
Image Source: Shutterstock



THC BEVERAGE DRINKERS AGREE THEY HAVE...



Source: Technomic October 2025 consumer survey

Note: Consumers ages 21+ in states where THC beverages are legal

THC Beverage Impact

At-risk alcohol categories

Share of Frequent Category Consumers Who Also Consume THC Beverages

87% RTD cocktail

83% Craft beer

73% Wine

65% Cocktail

57% Domestic beer

Source: Technomic October 2025 consumer survey

Note: Consumers ages 21+ in states where THC beverages are legal

Image Source: Envato Elements



Demand for THC beverages is on the rise **but** may cannibalize alcohol sales

Solving for This Conundrum

Be proactive, be informed

Craft an optimized THC beverage selection and market strategically

Be in compliance monitor regulatory updates

Conduct risk assessment

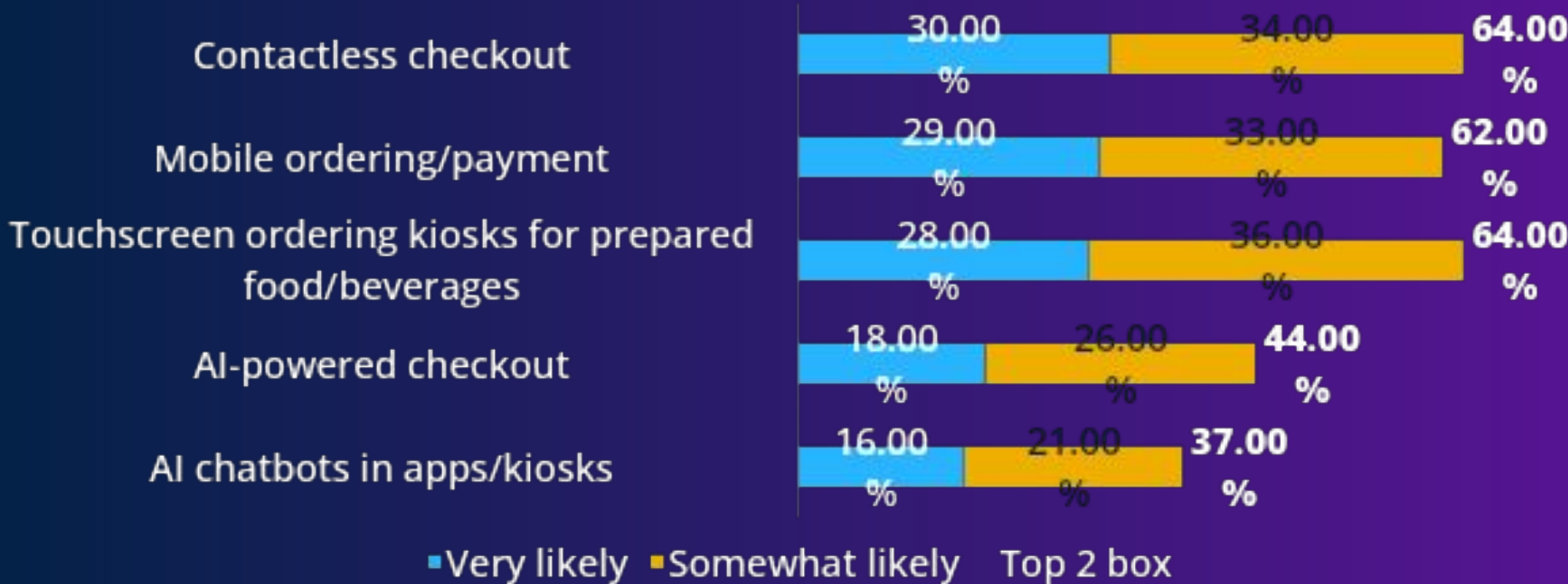
Analyze consumer purchase behaviors to identify high-risk alcohol categories

Evaluate impact on sales mix and profitability

Tech-Driven Transactions

Drive convenience

LIKELIHOOD OF INCREASING C-STORE VISITATION



Base: 1,000 c-store consumers
 Source: Technomic Q4 2025 C-Store Consumer Market Brief

Restaurant Reality

Pros and Cons of Kiosks

Shake Shack touts benefits of shift to kiosk ordering

Labor-savings

Positive sales mix

Better customer service

Speed of visit scores

Kiosk **38%**

At the counter **45%**

Source:
Image Source: [Restaurant Business website](#)



Starbucks returns to its roots



Image Source: [Restaurant Business Online](#)

Amazon Go stores shuttered



Image: [sanfranciscobusiness.com/photos](https://www.sanfranciscobusiness.com/photos)

Image Source: [San Francisco Business Times](https://www.sanfranciscobusiness.com/photos)

Speed and ease of tech appeals, **but** can impact consumer satisfaction

Solving for this Conundrum

Automate, don't alienate

Prioritize UX

Ensure trained staff are available to guide consumers in using transaction tools

Hire for hospitality

Skills, and task execution can be taught, positive attitude and friendliness can't

Give interpersonal skills equal priority as technical skills in training and development



Crafting consumer-centric strategies that account for business realities is crucial to driving growth

Today's consumer is demanding, yet cost constrained – value is an elastic concept

Health is being redefined for some, creating opportunity for differentiation

Emerging categories present opportunity, and risk

Efficiencies that enhance the consumer experience drive satisfaction and frequency



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