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Roadside Loyalty in Transition

U.S. Drivers' Views on Convenience, Charging, and Rewards
Key Themes and Insights

Survey Methodology and Demographics

Objective: To develop a deeper understanding of what's driving customer loyalty in roadside convenience retail.

- **Field dates:** January 6-7, 2026 (online)
- **Audience:** US citizens, 18+ with a valid driver's license and own/lease a vehicle.
- **Confidence:** Survey conducted at +/- 4% margin of error

The sample of **601 US drivers** included:

- **Location:** 51 states (22% urban, 61% suburban, 17% rural)
- **Ages:** 18-28 (18%), 29-44 (28%), 45-60 (32%), 61+ (21%)
- **Gender:** Female (49%), Male (49%), Non-binary (2%)
- **Vehicles:** 88% gas, 11% Hybrid, 5% EV, 1% PHEV, 2% E85/diesel

How are drivers using C-stores?

Key statistics about loyalty and frequency of visit.



How are drivers using C-stores?

They visit **frequently**. Asked how often they visit C-stores:

- **58%** (n= 346) said at least once a week, while...
- **24%** (n=145) said more than once a week.

They visit **selectively**. Asked for their most frequent reasons to visit:

- **95%** (n= 568) said for fuel and/or EV charging.
- **57%** (n=345) are buying food or drink.

They visit **briefly**.

- **91%** (n= 545) said they usually stay for less than ten minutes, and...
- **44%** (n=262) are on site for less than five.

How loyal are drivers to their favorite store?

There's a **strong trend towards brand loyalty**:

- **78%** (n=470) usually or only visit brands they know while travelling.
- **3%** (n=18) said they always visit new brands.

That's despite **limited take-up of loyalty programs**:

- **45%** (n=271) are members of loyalty programs.
- Among that demographic, the most popular were:
 - Grocery store schemes (25%)
 - 7-Eleven (22%)
 - Costco (20%)

And **63% were willing to switch loyalty schemes** to get better rewards (n=170)

- Rising to 79% of Gen Z drivers (n=34).



What's really driving C-store loyalty?

Convenience, Experience and Variety

What's really driving C-store loyalty?

Convenience: Drivers consider C-stores to be a pit stop.

- **70%** (n=418) rated reliability of payment/refueling systems as “extremely important” when considering whether to re-visit a C-store.
- **69%** (n=416) said the same about the store’s location – reflecting an aversion to detours, which is good news for fuel retailers.
- **33%** of open text responses (n=196) referenced fast turnaround, tap-to-pay, short queues and easy access as part of an ideal C-store experience.

However, they don't always get that service. Asked what would have improved their most recent C-store visits:

- **39%** (n=235) said faster, easier checkout/payment – rising to 49% of Gen-Z (n=53) and 43% of Millennials (n=73).
- **32%** (n=191) said the location could have been more convenient or accessible.

What's really driving C-store loyalty?

Experience: C-stores have minutes to make a good impression.

- **67%** (n=400) said a safe, well-lit forecourt was an “extremely important” consideration when deciding whether to re-visit a C-store
- **57%** (n=344) said the same about cleanliness (e.g. store, restrooms, pumps).
- **22%** (n=131) of open-text responses referenced cleanliness (topped by restrooms) and safety (lighting) as part of an ideal C-store experience.

Again, the reality doesn't always meet expectations...

- **43%** (n=258) said their most recent C-store visits were let down by poor cleanliness – 54% of Gen-Z (n=59) and 48% of Millennials (n=81).
- **25%** (n=153) added that stores could have been in a safer or more familiar location – 37% of Gen-Z (n=40) and 30% of Millennials (n=51).

What's really driving C-store loyalty?

Variety: Drivers want more than just gas.

- **48%** (n=289) rated consistency of products and services as an “extremely important” factor for attracting a return visit.
- **23%** (n=140) placed the same importance on food and beverage options.
- **23%** (n=141) of open-text responses referenced refreshments as part of an ideal C-store visit, including a variety of healthy, ready-to-eat and hot food and coffees.

These are also sticking points:

- **34%** (n=204) said their most recent visits would have been better with a wider range of food and refreshments.
- **30%** (n=181) said the same about limited healthy options.

Action points for C-stores

How to attract loyal customers.

How important are food and refreshments?

Amenities are critical: 79% of the total audience (n=477) said their preferred combination of features would likely/very likely encourage loyalty.

Food and refreshments are an important part of that mix:

- **57%** (n=345) listed take-away/eat in food as one of their most frequent reasons to visit a C-store – only fuel ranked higher.
- **66%** who said they visit more than once a week (n=96) are shopping most/every time – compared to 22% of less frequent visitors (n=99).
- **59%** of frequent visitors (n=85) are getting take-away or eat-in food, compared to 18% of the rest of the sample (n=84).
- Those last two points are both statistically significant ($p < 0.001$).

Asked what might encourage them to buy food at a convenience store:

- **65%** (n=392) of respondents rated low prices as “very important” (the top answer).
- **58%** (n=348) rated the quality of food and beverages just as highly.
- **38%** (n=226) prioritise the variety of products on offer.
- **29%** (n=177) wanted healthy foods.
- **28%** (n=167) sought ready to eat or ‘grab and go’ options.

What does a good loyalty program look like?

Loyalty schemes can be an antidote to perceived high prices.

- **76%** (n=459) said lower prices would have improved their most recent C-store visit, while...
- **Saving money** (through discounts, rewards and offers) ranked as the most popular reasons for joining a loyalty scheme.

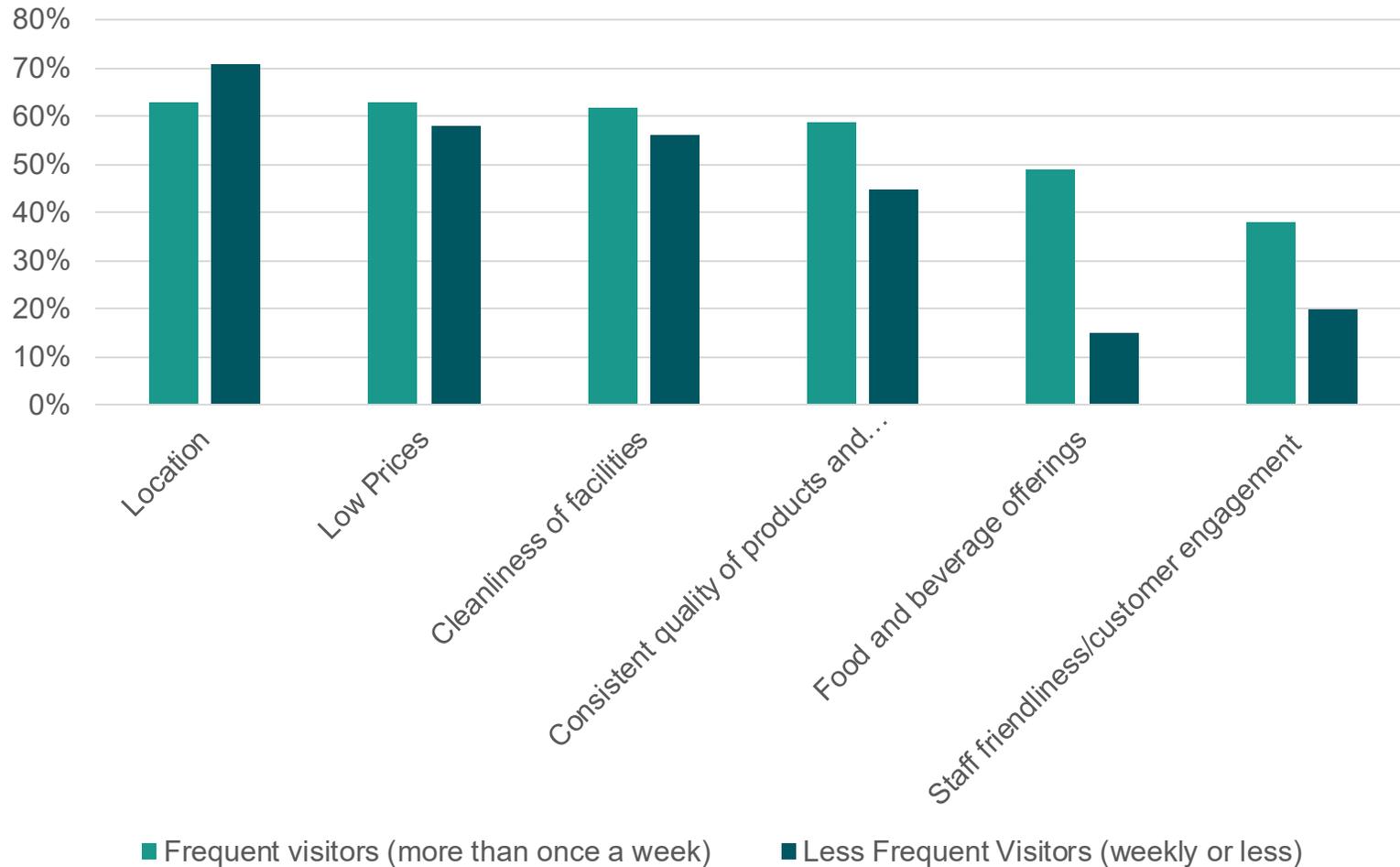
Members trended towards specific discounts. Asked to identify the most appealing loyalty scheme rewards:

- **89%** (n=240) said discounted fuel/charging – it was the most popular answer across all demographics.
- **54%** (n=146) wanted free coffee and snacks – 59% of Millennials (n=51) and 70% of Gen Z (n=30).
- **47%** (n=128) said earning points would be desirable – 54% in Millennials (n=47), 63% in Gen Z (n=27).

Drivers are also happy to engage with new platforms:

- **47%** (n=282) of the total sample said paying for in-store items at the pump/charger was appealing
- **64%** (n=173) of loyalty scheme members are engaging with loyalty schemes through an app – rising to 74% of Gen Z drivers within that cohort (n=32)
- **41%** (n=112) of loyalty scheme members wanted a single platform linking rewards on fuel, charging, in-store purchases and the car wash.

How can C-stores stand out from rivals?



The survey asked drivers to name the most important factors for a return visit to a C-store.

A convenient location, low prices and clean facilities are **expected standards** for all drivers.

However, **customer experience** is vital for securing the most frequent visitors (more than once a week).

How can C-stores stand out from rivals?

Open text responses tell a similar story. Asked what would secure their "forever loyalty", respondents raised multiple human-related factors – beyond convenience and price. Examples include:

- *"Be born in Philadelphia, then you are forever loyal to Wawa by blood."*
- *"Friendly employees and consistently the same whenever I'm encounter that brand."*
- *"Friendly, knowledgeable cashiers that take the time to greet me and if a regular learn my name."*
- *"A really killer food item. Be it a great burger, pizza, something interesting like a sausage roll, whatever."*
- *"I would say just making the visit as frictionless and convenient as possible, that is mainly what I would be looking for from a station or convenience store."*
- *"Consistently clean, well-maintained restrooms—every time, at every location—would earn my forever loyalty, because it shows respect for customers and reliability I can count on when traveling."*

Thank you!