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Powering the way the world moves

Roadside Loyalty in Transition

U.S. Drivers’ Views on Convenience, Charging, and Rewards

Key Themes and Insights

Objective:

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

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Survey Methodology and Demographics

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.

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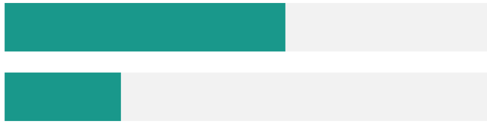
How are drivers using C-stores?

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.

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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. The most popular were:

Grocery store schemes **25%**, 7-Eleven **22%**, Costco **20%**

Drivers willing to switch loyalty schemes to get better rewards:

63% (n=170) are willing to switch loyalty schemes. Rising to:

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

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What’s really driving C-store loyalty?

Convenience, Experience and Variety

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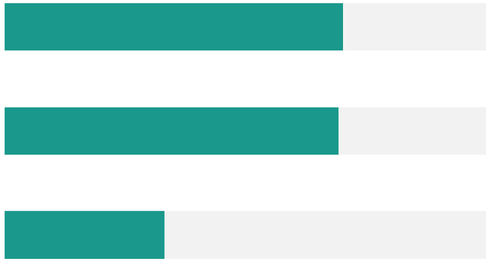
What’s really driving C-store loyalty?

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

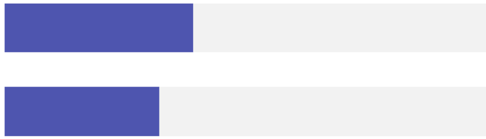


70% (n=418) rated reliability of payment/refueling systems as “extremely important” when considering whether to re-visit a C-store.

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.

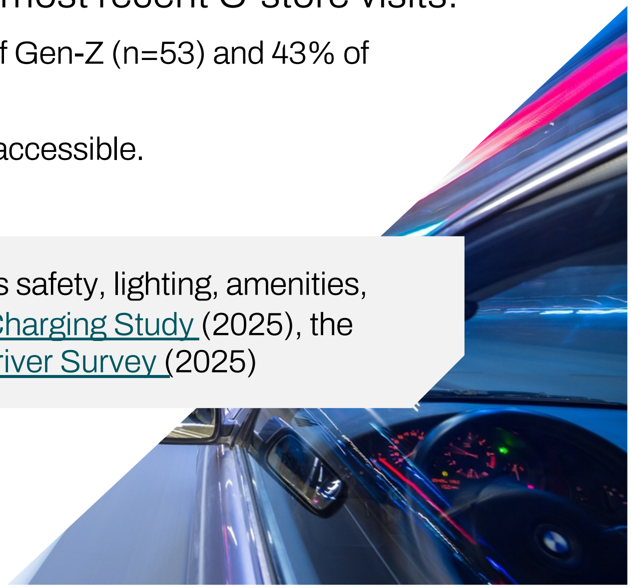
However, they don’t always get that service. Asked what would have improved their most recent C-store visits:



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.

Additionally, a clear majority of EV drivers choose charging locations based on experience factors such as safety, lighting, amenities, and overall site quality, according to multiple independent studies — including J.D. Power’s EVX Public Charging Study (2025), the Fuels Institute’s Electric Vehicle Consumer Behavior report (2021), and Plug In America’s National EV Driver Survey (2025)



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

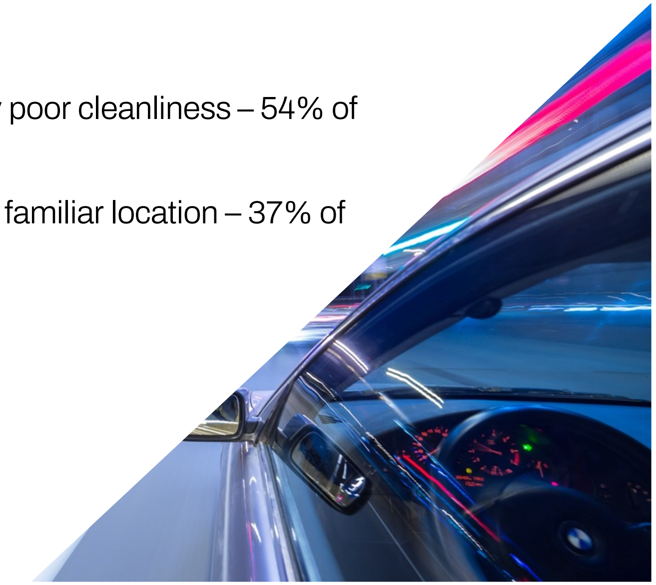
57% (n=344) said the same about cleanliness (e.g. store, restrooms, pumps).

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.

11% (n=30) of Gen X and millennials reported a high frequency of car wash use, twice as large as other generations.

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.

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Action points for C-stores

How to attract loyal customers.

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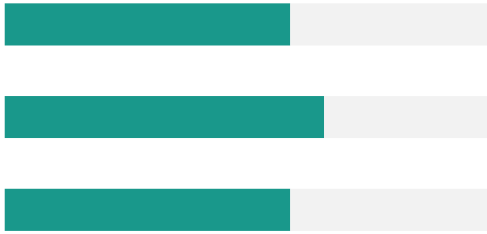
How important are food and refreshments?

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:



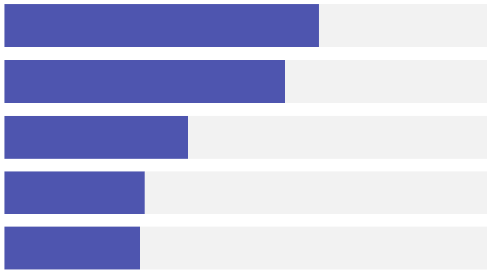
57% (n=345) listed take-away/eat in food as one of their most frequent reasons to visit a C-store – 64% of Millennials (n=109) and 67% of Gen Z (n=67).

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.

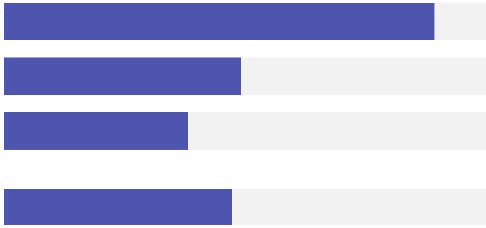
28% (n=167) sought ready to eat or ‘grab and go’ options.

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:



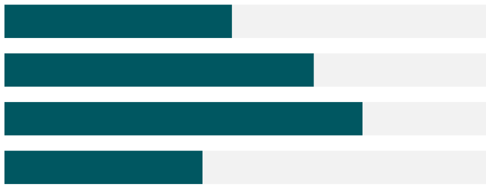
89% (n=240) said discounted fuel/charging – it was the most popular answer across all demographics.

54% (n=146) wanted free coffee and snacks – 59% of Millennials (n=51) and 70% of Gen Z (n=30).

38% (n=41) of Gen Z respondents said they would use a car wash more often if it were bundled into a loyalty program.

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.

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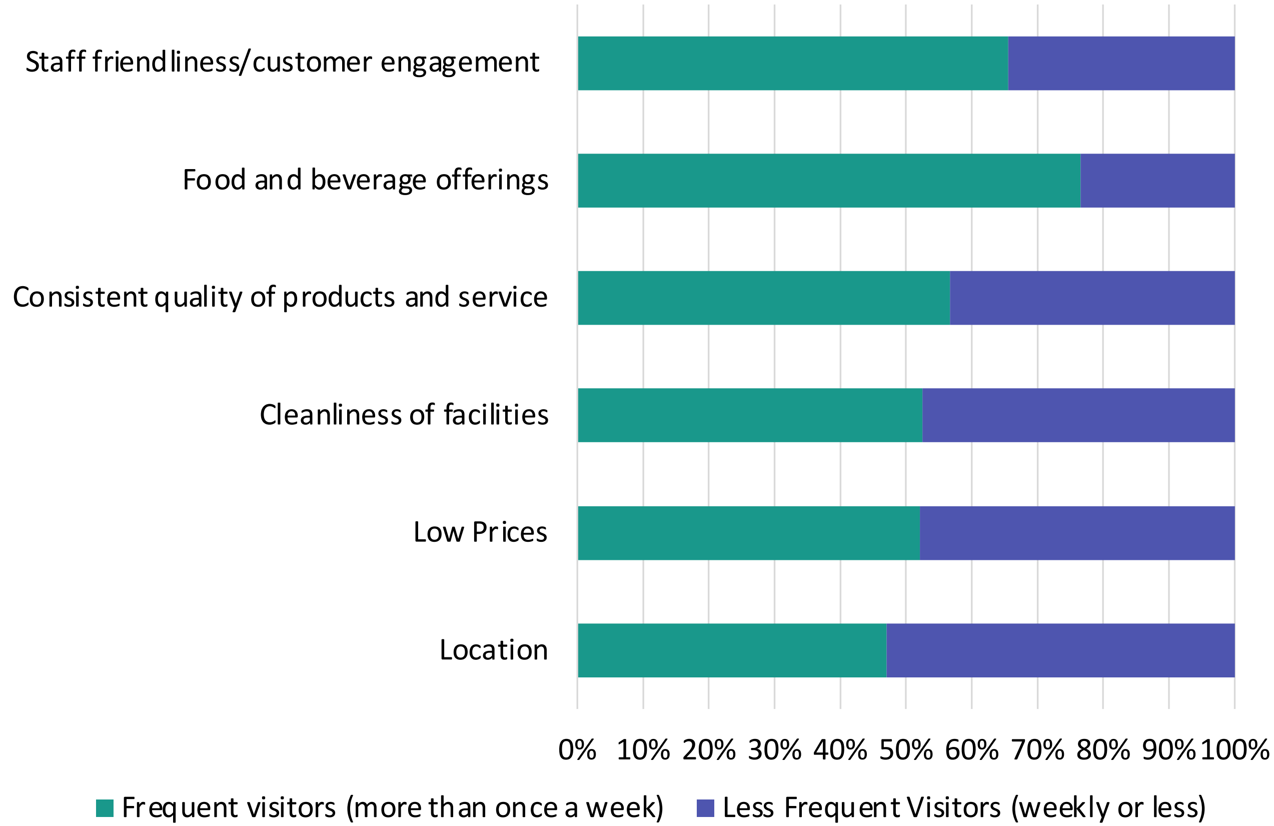
How can C-stores stand out from rivals?



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).

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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!

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