MULTI-CLIENT SPONSORSHIP STUDY

Convenience Store Foodservice: Winning the Next Meal Occasion

Proposed 2027 Update #12744

Introduction

Convenience stores have become serious foodservice competitors, but the channel remains highly uneven. Leading retailers have built credible prepared-food and beverage destinations, while many others still struggle to move beyond traditional gas-station expectations. The next stage of growth will depend on whether c-stores can win a broader range of breakfast, lunch, dinner, snack, and beverage occasions—and convert occasional visitors into repeat foodservice customers.

The competitive set is also widening. C-stores now compete not only with other retailers, but with quick-service restaurants, coffee shops, grocery prepared foods, delivery, and products consumers keep at home or work. Operators must balance freshness, quality, speed, value, assortment, labor, equipment, food safety, and waste while creating a program that can be executed consistently across locations.

This 2027 update will build on Foodservice IP's prior c-store research while focusing more directly on meal occasions, consumer trust and trial, product and beverage opportunities, operating models, and the role manufacturers can play in helping retailers grow foodservice sales.

This proposal is a working research framework that will be refined with study sponsors before fieldwork begins.

Overall Objectives

- Provide a comprehensive assessment of the current state and future direction of convenience store foodservice.
- Identify the meal, snack, and beverage occasions offering the strongest potential for increased traffic, frequency, and spending.
- Measure consumer attitudes, usage, satisfaction, trust, and barriers to purchasing prepared food and beverages from c-stores.
- Understand retailer priorities, operating challenges, product needs, investment plans, and supplier-selection criteria.
- Evaluate the outlook for prepared foods, dispensed and packaged beverages, grab-and-go, made-to-order, and bundled meals.
- Determine how c-stores can compete more effectively with restaurants, grocery prepared foods, coffee shops, and other alternatives.
- Identify product, packaging, equipment, merchandising, and manufacturer-support opportunities.
- Provide sponsors with a practical how-to-win framework for participating in c-store foodservice.

Proposed Key Issues

To be refined with sponsor input during kickoff.

Market Direction and Channel Priorities

- How has c-store foodservice changed since FSIP's prior studies, and which developments are likely to have lasting importance?

- How important is foodservice to retailer traffic, sales, profitability, loyalty, and competitive positioning?
- Which operators and operating models represent best-in-class foodservice execution, and what differentiates them?
- Where are retailers increasing or reducing investment in foodservice programs, labor, equipment, technology, and store design?
- What are the most important growth drivers and inhibitors during the next three to five years?
- How do priorities differ by retailer size, geographic footprint, foodservice sophistication, and store format?

Winning More Meal Occasions

- Which occasions—breakfast, lunch, dinner, morning snack, afternoon snack, late night, or beverage-only—offer the greatest growth potential?
- What products, bundles, price points, and service formats are needed to compete effectively during each occasion?
- Where are c-stores already credible alternatives to restaurants, and where do consumers remain reluctant to substitute?
- What causes a consumer to choose a c-store for an immediate meal rather than simply purchase fuel, snacks, or packaged beverages?
- How do weekday, weekend, commuting, travel, workplace, and at-home routines affect occasion usage?
- What role can all-day availability and flexible menuing play in capturing demand beyond traditional dayparts?

Consumer Trial, Trust and Repeat Purchases

- How often do consumers purchase c-store foodservice, and how does frequency vary by occasion, category, retailer type, and demographic group?
- Which consumers are heavy, moderate, light, lapsed, or non-users of c-store prepared foods and beverages?
- What drives initial trial, satisfaction, repeat purchase, and willingness to recommend a retailer's foodservice program?
- How do consumers assess freshness, quality, taste, temperature, food safety, cleanliness, value, and consistency?
- Which negative perceptions still limit c-store foodservice usage, and what evidence or experiences can overcome them?
- How important are recognizable brands, visible preparation, packaging, employee interaction, and store environment in establishing trust?
- Where are consumers satisfied with existing options, and what unmet needs or innovations would encourage greater usage?

Prepared Food and Menu Opportunities

- What is the outlook for breakfast sandwiches, burgers, chicken, pizza, hot dogs, roller-grill items, tacos, burritos, sandwiches, salads, bowls, soups, bakery, desserts, and other prepared foods?
- Which categories are gaining retailer investment, consumer interest, menu space, and purchase frequency?
- Where do made-to-order, grab-and-go, self-serve, and delivery-oriented formats work best?
- How important are freshness, customization, portability, health positioning, premium ingredients, global flavors, and limited-time offers?
- Which products are most effective for building a complete meal, increasing attachment, and improving the average check?
- Where are retailers seeking better product quality, longer shelf life, improved holding performance, easier preparation, or reduced waste?

Beverage Opportunities

- What is the outlook for hot coffee, iced coffee, cold brew, espresso beverages, fountain drinks, frozen beverages, tea, energy, hydration, functional, and protein beverages?

- Which beverage categories are traffic drivers, margin builders, meal accompaniments, or destinations in their own right?
- How are consumer expectations changing around quality, customization, flavor, functionality, temperature, size, and value?
- What is the role of refill programs, subscriptions, loyalty offers, bundles, and beverage-food pairing?
- Where do equipment, cleaning, training, throughput, ingredient handling, or consistency limit program development?
- How do packaged beverages complement or compete with dispensed beverage programs?

Value, Pricing and Promotion

- How price-sensitive are c-store foodservice customers by category and occasion?
- Where will consumers pay more for convenience, quality, freshness, customization, larger portions, or premium ingredients?
- Which bundles, meal deals, loyalty offers, digital promotions, and limited-time offers are most effective?
- How do retailers balance value perception with food, packaging, labor, and waste costs?
- What price and value benchmarks do consumers use when comparing c-stores with QSRs, grocery stores, coffee shops, and delivery?

Operations, Labor and Equipment

- How are labor availability, employee skill, turnover, training, and store-level compliance affecting foodservice expansion?
- Which preparation formats are preferred: made-to-order, assembled on site, ready-to-cook, ready-to-heat, thaw-and-serve, or fully prepared?
- How are commissaries, central kitchens, direct-store delivery, broadline distribution, and local sourcing used?
- What tradeoffs will retailers accept among product cost, labor savings, speed, consistency, shelf life, quality, and customization?
- Which equipment capabilities or limitations most influence menu decisions?
- Where are automation, digital ordering, self-service, forecasting, and other technologies improving execution?
- What are the greatest food safety, holding, temperature, shrink, waste, and consistency challenges?

Merchandising, Ordering and Customer Experience

- How important are store layout, menu boards, displays, signage, lighting, visibility, and the location of foodservice within the store?
- How are mobile apps, loyalty programs, digital ordering, kiosks, delivery, and pickup affecting foodservice usage?
- What packaging attributes matter most for portability, temperature, product visibility, ease of eating, tamper evidence, and sustainability?
- What causes consumers to add a foodservice item to an existing store visit or make a trip specifically for food or beverages?
- How can retailers create a more restaurant-like experience without sacrificing convenience and speed?

Purchasing and Supplier Relationships

- How are foodservice products sourced, specified, tested, approved, distributed, and rolled out?
- Who influences menu, purchasing, equipment, packaging, and supplier decisions at headquarters and store level?
- What are the most important product and supplier-selection criteria?
- What are the most common reasons new products fail during testing, rollout, or store-level execution?
- Where do retailers want more culinary support, consumer insight, category expertise, training, merchandising, equipment assistance, or business-building ideas?
- How can manufacturers differentiate themselves beyond product and price?

Proposed Scope

The core study will focus on proprietary foodservice programs operated or controlled by the convenience retailer. Nationally branded QSR concepts located within c-stores may be examined as part of the competitive environment but will not be treated as proprietary c-store foodservice. Final definitions and inclusions will be confirmed with sponsors.

Product Scope

- Dispensed hot, cold, and frozen beverages
- Single-serve packaged beverages
- Breakfast foods and bakery
- Sandwiches, burgers, chicken, pizza, and other handhelds
- Roller-grill items, appetizers, bites, and sides
- Salads, fruit, yogurt, soups, bowls, and entrées
- Desserts, snacks, and meal accompaniments
- Sauces, toppings, condiments, and menu components
- Grab-and-go and takeout packaging
- Foodservice and beverage equipment
- Digital ordering, merchandising, and other supporting solutions

Proposed Methodology

Final sample design and research instruments will be shaped with sponsor input.

1. Engagement Initiation

- Private kickoff discussions with each sponsor to review objectives, product categories, customer priorities, and intended uses of the research.
- Sponsor review of the consumer questionnaire, retailer questionnaire, and executive discussion guide before launch.
- Confidential sponsor-only questions incorporated into the research and reported privately.

2. Existing Data and Menu Review

- Review of public information, retailer programs and menus, industry reporting, and relevant FSIP proprietary research.
- Comparison with prior FSIP c-store studies to identify meaningful changes and persistent issues.

3. Consumer Research

- A nationwide online survey of approximately 500 consumers who have visited a convenience store recently.
- Measurement of foodservice usage, purchase frequency, occasions, category behavior, retailer selection, satisfaction, trust, competitive substitution, value perceptions, and unmet needs.
- Analysis by usage level, occasion, category, demographic group, and other relevant segments.

4. Quantitative Retailer Research

- Approximately 100 interviews with qualified c-store retailers responsible for foodservice operations, purchasing, merchandising, culinary, category management, or program development.
- Coverage of chain and high-volume independent retailers with active proprietary foodservice programs.
- Measurement of current practices, menu and product priorities, sourcing, equipment, operating barriers, supplier needs, investment plans, and future expectations.

5. Executive Interviews

- Approximately 15–20 in-depth interviews with foodservice executives at leading c-store retailers and selected channel stakeholders.
- Exploration of strategy, business economics, best practices, operating models, product development, supplier relationships, and the future direction of c-store foodservice.
- Development of qualitative context that explains the reasons behind the quantitative findings.

6. Strategic Analysis and Reporting

- Integration of consumer, retailer, executive, market, and prior FSIP findings into a comprehensive channel assessment.
- Identification of priority occasions, consumer segments, categories, retailer needs, product opportunities, and implications for manufacturers.
- Development of a practical how-to-win framework for sponsor sales, marketing, innovation, and channel strategy.

Study Deliverables

- Comprehensive PowerPoint report featuring detailed analysis, strategic implications, charts, and executive commentary.
- Assessment of c-store foodservice growth, meal occasions, consumer behavior, retailer priorities, operational needs, and future direction.
- Category and occasion analysis covering prepared foods, beverages, grab-and-go, made-to-order, and bundled meal opportunities.
- Identification of critical success factors and best practices for competing in c-store foodservice.
- Practical recommendations for product development, packaging, equipment, merchandising, sales, and channel strategy.
- Complete research instruments, cross-tabulations, and supporting data appendix.
- Confidential reporting of each sponsor's proprietary questions.
- Sponsor presentation and discussion following internal review of the report.
- Ongoing access to FSIP for follow-up questions and interpretation at no additional cost.
- Optional post-study strategy workshop to translate findings into company-specific growth priorities and action plans.

The Strategic Value to Sponsors

This study will help manufacturers understand not only what c-store retailers and consumers want, but what is required to turn an appealing product into a scalable foodservice solution. It will connect consumer demand with the operating, labor, equipment, distribution, packaging, and merchandising realities that determine whether programs succeed across multiple locations.

Sponsors will gain a clearer understanding of which occasions, categories, retailer types, and consumer groups deserve priority; where current offerings fall short; how c-stores compare with restaurants and other competitors; and which forms of manufacturer support can improve adoption and strengthen customer relationships.

Foodservice IP's C-Store Experience

Foodservice IP has studied convenience store foodservice through multiple waves of proprietary research and has advised manufacturers on channel strategy, opportunity identification, product positioning, innovation, sales, and go-to-market planning. The 2027 program will build on that experience while addressing the channel's current competitive and operating environment.

The project will be led by Tim Powell, Principal. Senior FSIP consultants will remain involved from study design through fieldwork, analysis, reporting, and sponsor discussions so that the findings are interpreted as strategic evidence rather than delivered as a stand-alone collection of survey results.

Timing and Fees

- Anticipated project duration: approximately 14–16 weeks from initiation.
- Target kickoff: late fourth quarter 2026.
- Target delivery: first or second quarter 2027, depending on sponsor timing and final fieldwork scope.
- Pre-launch sponsors will help refine study objectives, category coverage, retailer priorities, and research instruments.
- $15,000 per sponsor for one study.
- Discounted participation: two studies for $26,500 or three studies for $35,000 when confirmed together.
- Private, in-person presentations are exclusive of travel expenses.

Billing Policy

- 50% upon project initiation
- Balance due upon delivery of the final report

Conclusion

The next phase of convenience store foodservice growth will depend on winning a broader range of meal and beverage occasions while maintaining the speed, accessibility, and value that define the channel. This study will provide sponsors with current consumer and retailer evidence, an understanding of the operational requirements behind successful programs, and practical guidance for competing in the channel.

Foodservice IP's shared-cost research model combines broad industry evidence with sponsor customization and ongoing strategic support. Sponsors help shape the work, receive confidential coverage of their priority questions, and retain access to the study team after delivery.

Participation Authorization

Our company confirms participation in the Foodservice IP multi-client study, Convenience Store Foodservice: Winning the Next Meal Occasion #12744, in the amount of $15,000.

Billing will follow the terms described in this proposal: 50% upon project initiation and the balance upon delivery of the final report.

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Name

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Title

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Company

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Address

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Email

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Signature

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Date

To participate, please sign this page and return it to tpowell@foodserviceip.com. Questions may be directed to Tim Powell at 312-600-5151.