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C-Store Quarterly Tracker

Q1 2026 EDITION

Based On Datassential's Table Stakes Tracker

Overview

About This Report

Datassential's C-Store Quarterly Tracker taps into the pulse of the C-store foodservice industry using monthly survey data. Explore a range of macro factors including consumer financial health, spending confidence, price sensitivity, and saving strategies. On the operator side, get a glimpse of the convenience store landscape, as well as operators' traffic and sales expectations, business priorities, and profitability strategies.

Methodology

The data populating this report was fielded through Datassential's Omnibus in December 2025 with **1,516 "gen pop" US consumers** & 464 foodservice decision makers, **17 of whom operate convenience stores.**

Exhibit Guide

CONSUMER

- Which of the following venues did you visit for a meal in-person within the last month?

- Which of the following venues did you get food delivered from within the last month?

- At places where you have purchased food in the past month, did menu prices seem higher than the last time you purchased food there?

OPERATOR

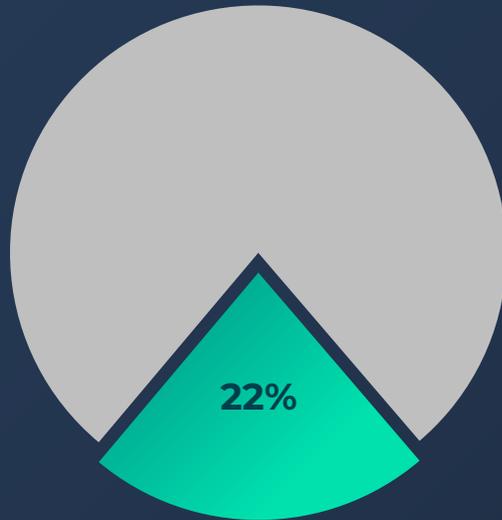- In the last month, how profitable was your operation?

- What share of your location's sales last month was consumed on-premise versus off-premise?

OPERATOR (cont.)

- Over the next month, what is your operation's outlook for traffic?

- Over the next month, what is your operation's outlook for sales?

- What are the top operational challenges you currently face?

- Which business goals are you prioritizing next month?

- In the past month, have you implemented any of the following profitability strategies for your operation?

- How have your sales last month changed from the prior month for the following menu categories and dayparts?
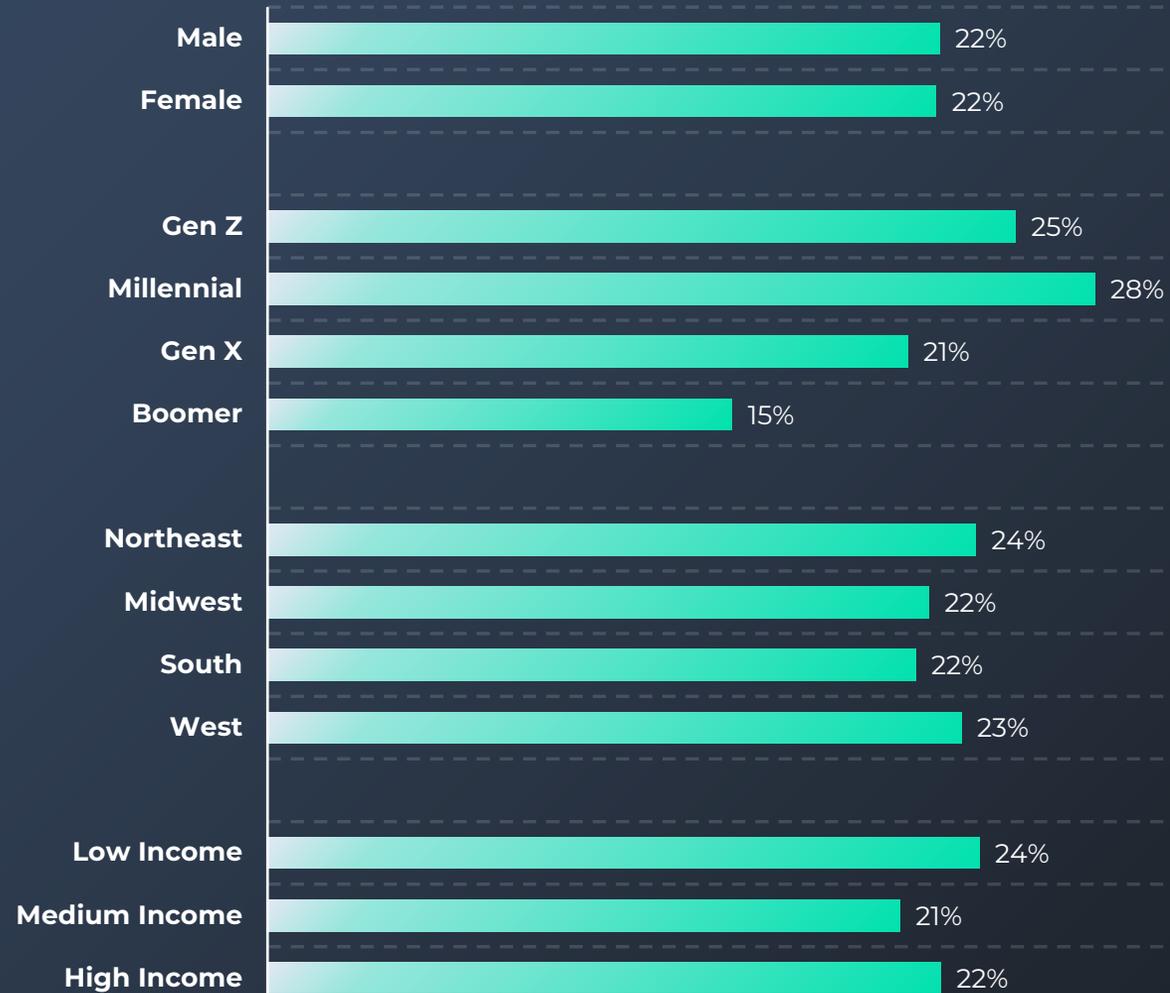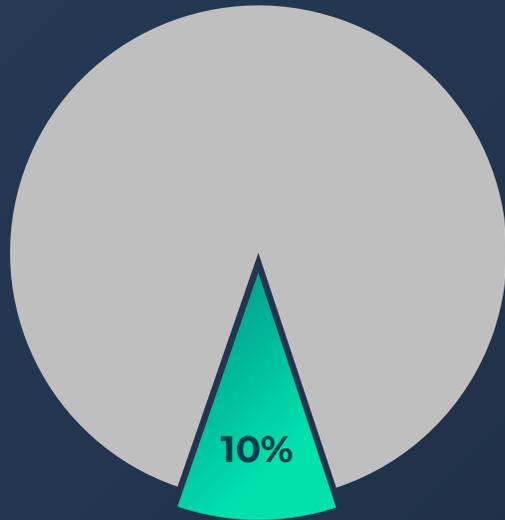
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Consumer: C-Store Visitation (Dine-In)

IN THE PAST MONTH

22%

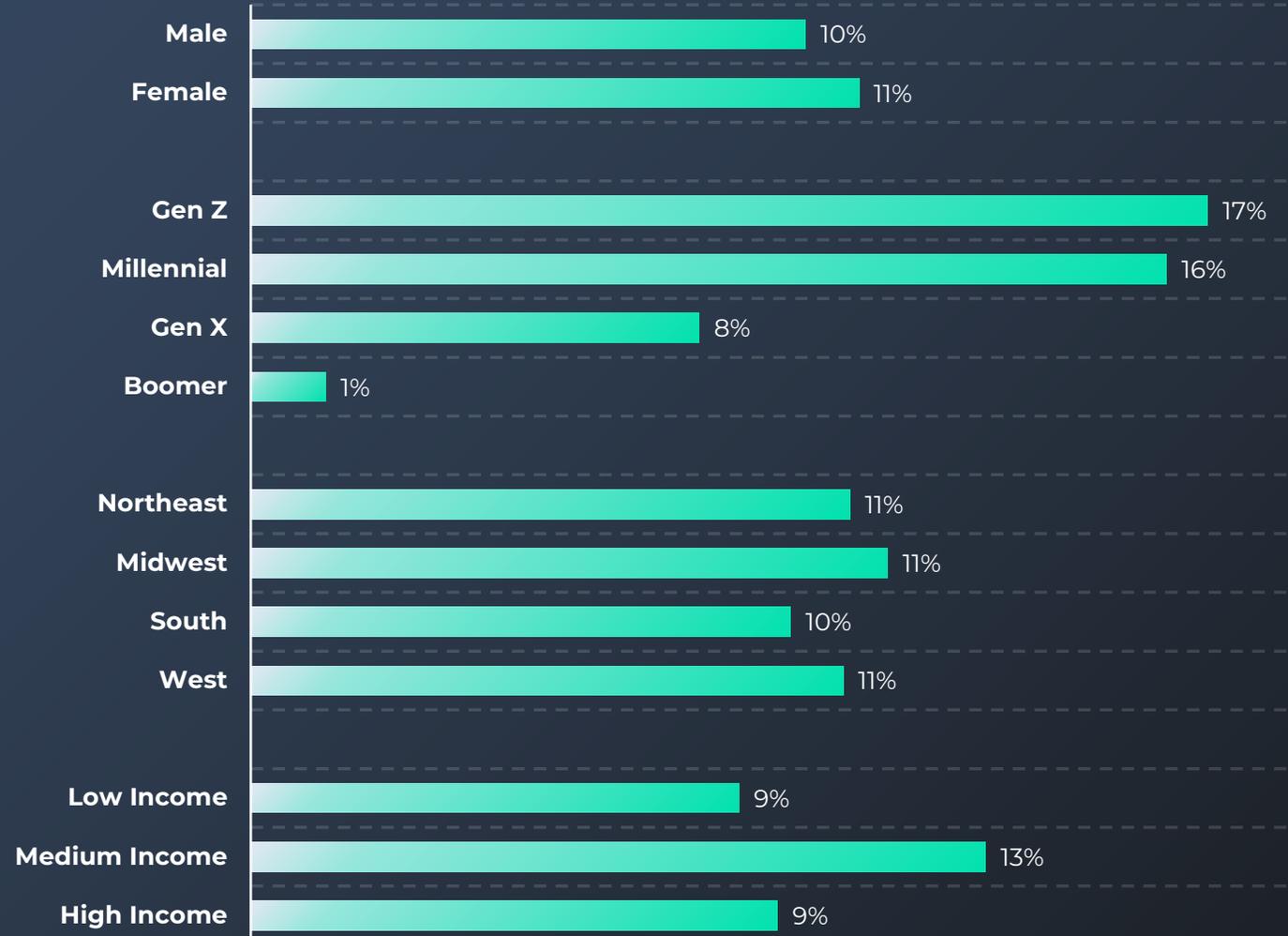**22%** of consumers **visited a convenience store in-person** for a meal away-from-home at least once.
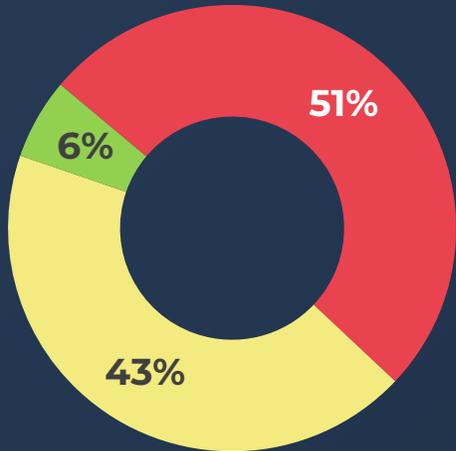
Male	22%
Female	22%
Gen Z	25%
Millennial	28%
Gen X	21%
Boomer	15%
Northeast	24%
Midwest	22%
South	22%
West	23%
Low Income	24%
Medium Income	21%
High Income	22%

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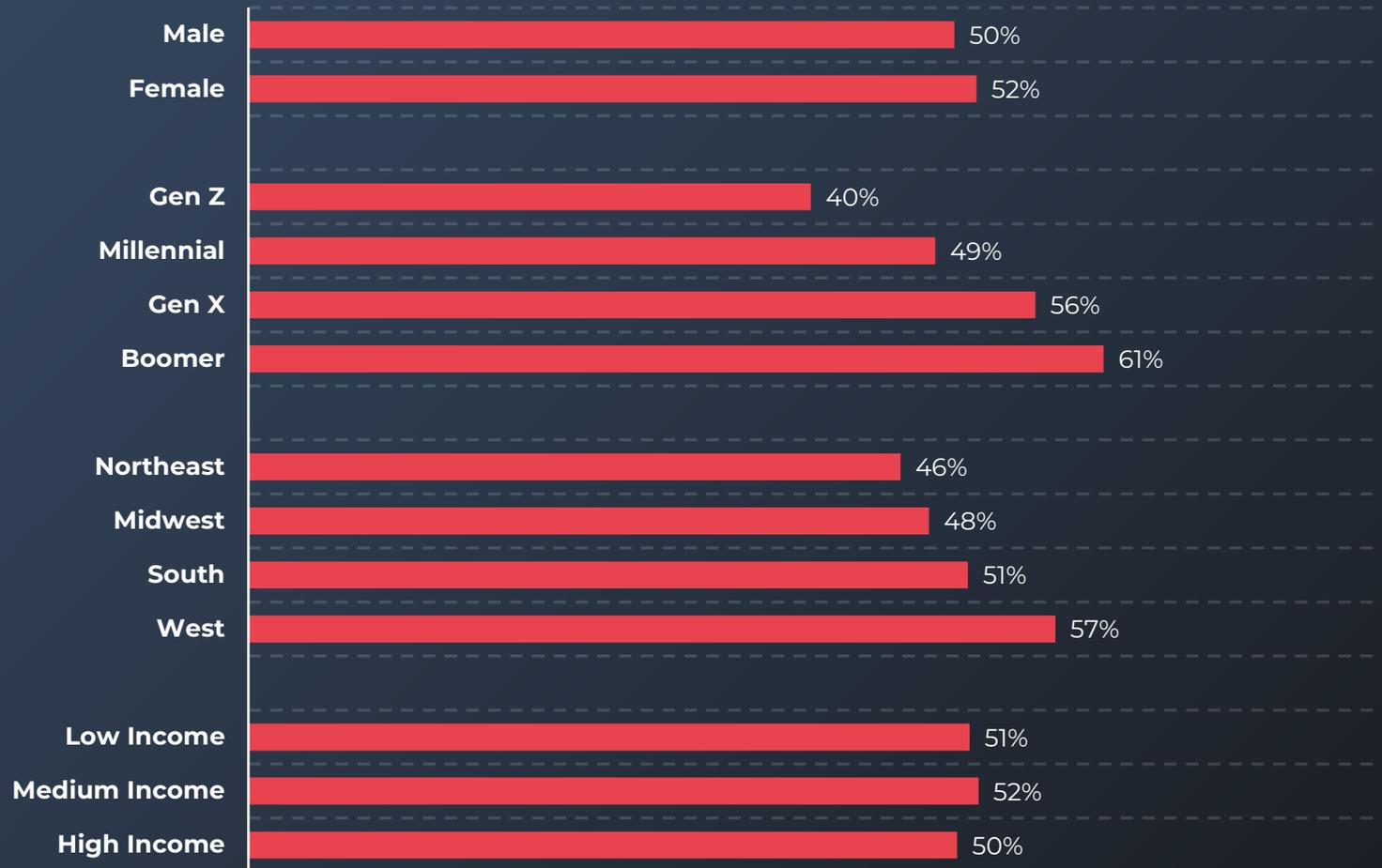
C-Store Operators: Business Metrics

How Would C-Store Operators Describe Their Business In The Past Month?
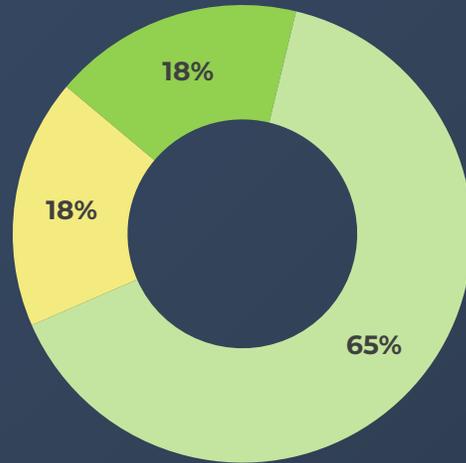
18%
VERY PROFITABLE
It was an excellent month

65%
PROFITABLE
We had an average month

18%
NOT VERY PROFITABLE
We had a below average month

0%
BROKE EVEN
Our revenue just covered our costs

0%
MADE A LOSS
Our costs exceeded our revenue

Traffic Expectation For The Upcoming Month
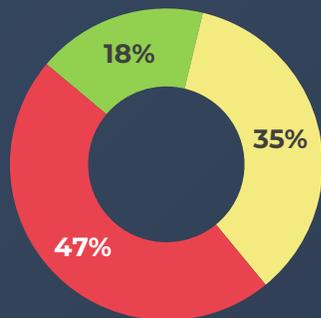
18%
EXPECT HIGHER
traffic levels

35%
EXPECT SIMILAR
traffic levels

47%
EXPECT LOWER
traffic levels

Sales Expectation For The Upcoming Month
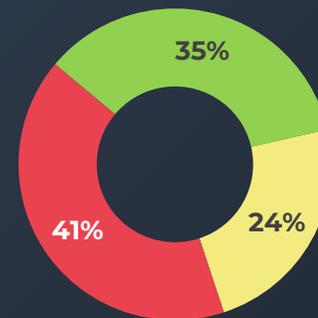
35%
EXPECT HIGHER
sales levels

24%
EXPECT SIMILAR
sales levels

41%
EXPECT LOWER
sales levels

C-Store Operators: Top Challenges & Business Goals

What Are C-Store Operators' Top Operational Challenges?

DEC 2025

Challenge	%
Food costs	71%
Customers reducing how often they visit	47%
Customers reducing how much they spend per visit	41%
Labor costs	35%
Labor recruitment / hiring	29%

What Business Goals Are C-Store Operators Prioritizing This Month?

DEC 2025

Goal	%
Reducing monthly food costs	47%
Increasing our average check	29%
Increasing our earnings / profit / bottom line	29%
Improving customer satisfaction and feedback	24%
Improving our labor and staffing situation	24%

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C-Store Operators: Top Profitability Strategies

In The Past Month, Have C-Store Operators Implemented Any Of The Following Strategies?

■ Did This Last Month   ■ Considering Next Month   ■ Not Considering

Strategy	Did This Last Month	Considering Next Month	Not Considering
Raised menu prices	35%	29%	35%
Focused on value	29%	41%	29%
Transitioned toward off-premise	24%	24%	53%
Launched new items / LTOs	24%	59%	18%
Sourcing more online from suppliers	18%	24%	59%
Switched / added new distributors	18%	29%	53%
Reduced our menu size	12%	18%	71%
Invested in technology / automation	12%	12%	76%
Reduced seating capacity	6%	12%	82%
Reduced hours of operation	—	24%	76%

DATASSENTIAL Table Stakes Tracker | Data fielded in the **December 2025 Operator Omnibus**

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