

CHANNEL CHECK-IN
FUEL & C-STORE EXPERIENCE | Topline & Methodology

METHODOLOGY

1. **Consumer Research** | Understand what drives consumers to favor certain fueling & c-store brands using an online, device-agnostic quantitative survey
- 15-minute LOI
 - n = 1,500 (18–75 yo past-month visitors to a gas station with walk-in convenience store. Consumer survey sample matches the U.S. population by age and gender characteristics).
 - Data collected May 7 – June 1, 2026
2. **Mystery Shopping** | Measure, in detail, the forecourt and backcourt experience at 28 brands' locations
- US, 18+
 - n = 40-75 shops per brand
 - Data collected May 6 – May 31, 2026

TOPLINE

L_BARRIERS_1. What would make you avoid a specific gas station in the future? Select all that apply. Thinking about the **fueling/forecourt** areas...

	Total
Unweighted Base	1500
Base: Total Answering	1500
Pump equipment is not working properly (e.g., out of order, slow, broken screens)	1169
	78%
Missing pump amenities (e.g., squeegees, paper towels, washer fluid)	444
	30%
It is difficult to enter or exit the property	953
	64%
Fueling area not clean or well-maintained	720
	48%
None of the above	47
	3%

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L_BARRIERS_2. What would make you avoid a specific gas station in the future? Select all that apply.
Thinking about the **facility**...

	Total
	A
Unweighted Base	1500
Base: Total Answering	1500
Convenience store area not clean	715
	48%
Dirty restrooms	872
	58%
No restrooms/out-of-order restrooms	780
	52%
Poor lighting	882
	59%
Feeling unsafe (e.g., loitering, lack of visible security)	1216
	81%
None of the above	42
	3%

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L_BARRIERS_3. What would make you avoid a specific gas station in the future? Select all that apply.
Thinking about service features...

Commented [MB1]: Confirmed text does not need to be blue but should be bolded

	Total
Unweighted Base	1500
Base: Total Answering	1500
Unfriendly or unhelpful staff	898
	60%
Payment problems (e.g., card not accepted, pump issues)	1137
	76%
No loyalty/rewards program available	370
	25%
None of the above	67
	5%

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L_BARRIERS_4. What would make you avoid a specific gas station in the future? Select all that apply.
Thinking about **products and offerings**...

	Total
Unweighted Base	1500
Base: Total Answering	1500
Limited product variety or out-of-stock items	392
	26%
Poor food/beverage quality	580
	39%
No fresh or freshly prepared food options	278
	19%
Fuel prices are too high	1240
	83%
Prices of convenience store items are too high	736
	49%
None of the above	49
	3%

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B_DARK. If you pulled up to a gas station at night and it wasn't well-lit, what would you do (assuming you have enough fuel to go elsewhere)?

	Total
	A
Unweighted Base	1500
Base: Total Answering	1500
Fuel at the station anyway	489
	33%
Look for a better lit station (Net)	851
	57%
Look for a better-lit gas station of the same brand	244
	16%
Look for a better-lit gas station regardless of the brand	607
	40%
Not applicable - I do not visit gas stations at night	160
	11%

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L_PROFILE_PUMP. What would make you more likely to go inside a gas station's convenience store?

	Total
Unweighted Base	1500
Base: Total Answering	1500
Product/Service attraction (Net)	1213
	81%
Craving a specific snack or drink I know they carry	805
	54%
Needing to buy a specific item (e.g., tobacco, lottery, medicine, etc.)	620
	41%
Carrying unique or exclusive items I can't find elsewhere	386
	26%
Knowing they have high-quality coffee or specialty beverages	486
	32%
Knowing they have fresh/made-to-order food	388
	26%
Convenience and Experience (Net)	1273
	85%
Needing to use the restroom	933
	62%
Seeing signage or promotions visible from the pump	236
	16%
Getting a discount on in-store items with my fuel purchase	503
	34%
Receiving mobile app alerts about deals while I'm fueling	181
	12%
Being able to order ahead on my phone for quick pickup	169
	11%
Express checkout or self-checkout options	293
	20%
Earning loyalty rewards I can redeem in-store	512
	34%

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L_AFFIL_WHY. Why haven't you downloaded any fuel-branded apps?

	Total
Unweighted Base	847
Base: Does not have branded fuel apps downloaded	847
App Overload/Setup Concerns (Net)	378
	45%
Too many apps on my phone already	348
	41%
It takes too much time to set up	86
	10%
Privacy/Security (Net)	302
	36%
Privacy or data security concerns	197
	23%
Don't want to link payment methods	197
	23%
Perceived Value/Usage (Net)	494
	58%
Don't see enough benefit/savings	285
	34%
Don't visit the same brand consistently	233
	28%
Didn't know they existed/what the benefits are	142
	17%
Payment Preferences (Net)	244
	29%
Prefer to using credit cards directly	244
	29%
None of the above	89
	11%