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C-Stores: From Convenient Stops to Go-To Destinations

Discover key strategies helping C-Stores drive visits, engage customers, and cement their roles as dining, shopping, and tourism destinations in their own right.

1. Between April 2023 and March 2024, **C-Stores** experienced consistent YoY visit growth, generally outpacing **Overall Retail**.
2. Chains like **Casey's**, **Maverik**, **Buc-ee's**, and **Rutter's** are redefining the C-Store space, helping transform convenience stores into prime destinations. Over the past year, the average number of visits to the four chains' locations grew YoY, outperforming the industry average.
3. **Casey's**, known for its breakfast and pizza offerings, and **Maverik**, which offers a popular breakfast burrito, have positioned themselves as a **breakfast spot**. Both chains attract higher-than-average shares of morning visitors and **Casey's** and **Maverik** also draw more fast food pizza and burrito aficionados, respectively, compared to the average C-Store.
4. **Buc-ee's** and Rutter's are proving that bigger can be better. **Buc-ee's** has emerged as a prime tourist attraction for families and weekend visitors, due in part to its outsize locations. And **Rutter's** is increasing visits and dwell time by embracing large-store formats.

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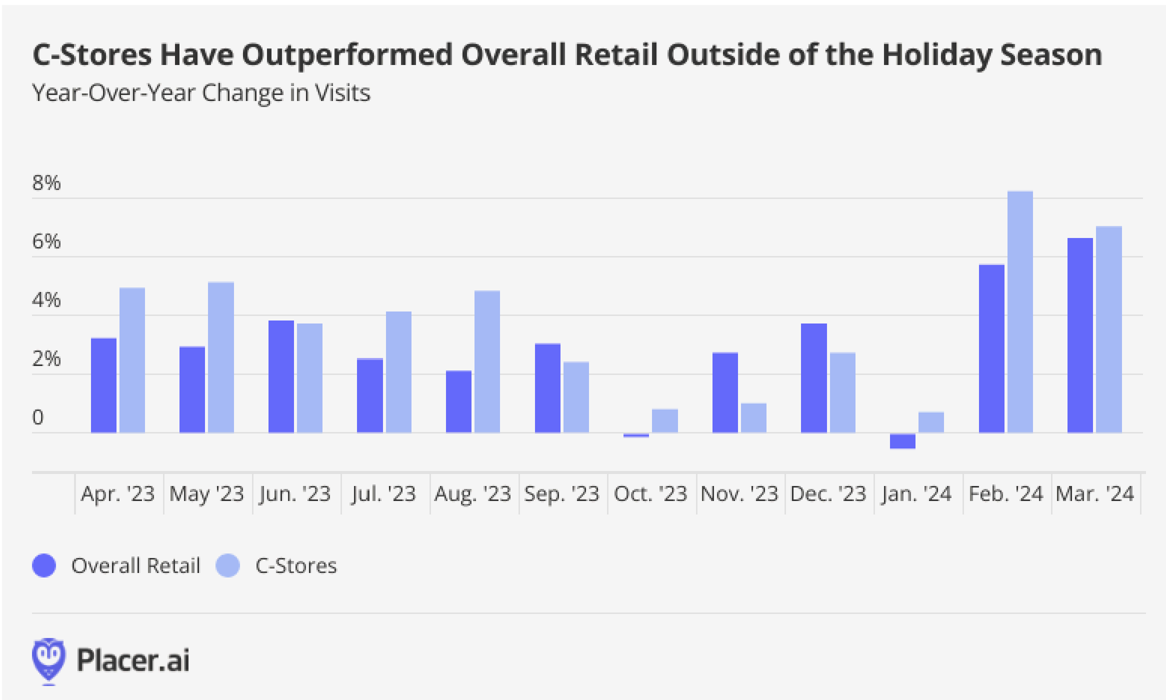
This report includes data from Placer.ai Data Version 2.0, which implements improvements to our extrapolation capabilities, adds short visit monitoring, and enhances visit detection.

C-Stores: Charging Ahead

Grabbing a coffee or snack at a convenience store is a time-honored road trip tradition – but increasingly, Convenience Stores (C-Stores) have also emerged as places people go out of their way to visit.

Convenience stores have thrived in recent years, making inroads into the discretionary dining space and growing both their audiences and their sales. Between April 2023 and March 2024, C-Stores experienced consistent year-over-year (YoY) visit growth, generally outperforming Overall Retail. Unsurprisingly, C-Stores fell behind Overall Retail in November and December 2023, when holiday shoppers flocked to malls and superstores to buy gifts for loved ones. But in January 2024, the segment regained its lead, growing YoY visits even as Overall Retail languished in the face of an Arctic blast that had many consumers hunkering down at home.

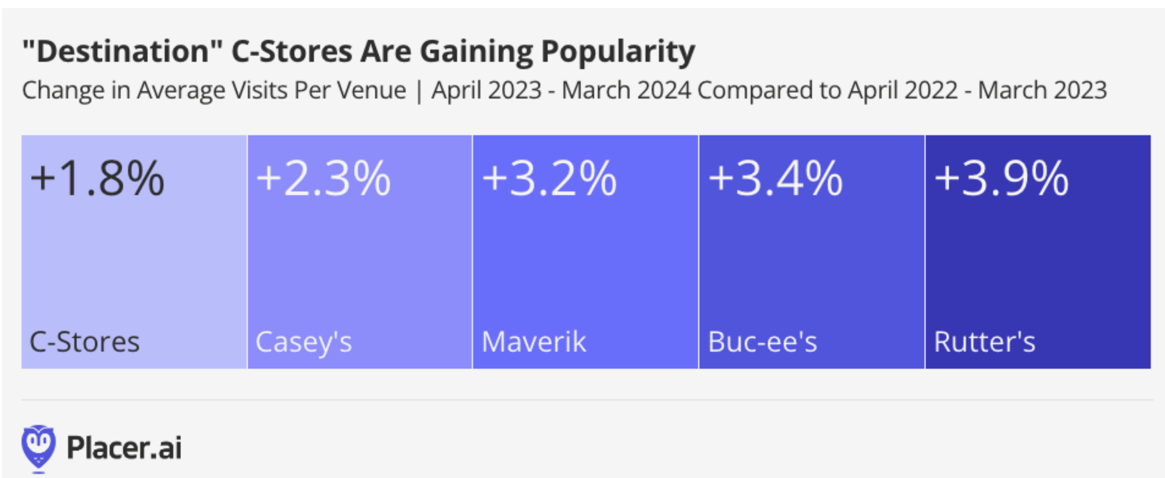


C-Stores' current strength is partially due to the significant innovation by leading players in the space: Chains like **Casey's**, **Maverik, Buc-ee's**, and **Rutter's** are investing in both in their product offerings and in their physical venues to transform the humble C-Store from a stop along the way into a bona fide destination. Dive into the data to explore some of the key strategies helping C-Stores drive consumer engagement and stay ahead of the pack.

Four C-Store Brands Ahead of the Curve

While chain expansion may explain some of the C-Store segment growth, a look at visit-per-location trends shows that demand is growing at the store level as well. Over the past year (April 2023 to March 2024), average visits per location on an industry-wide basis grew by 1.8%, compared to the year prior (April 2022 to 2023).

And within this growing segment, some brands are distinguishing themselves and outperforming category averages. **Casey's**, for example, saw the average number of visits to each of its locations increase by 2.3% over the same time frame – while **Maverik, Buc-ee's** and **Rutter's** saw visits per location increase by 3.2%, 3.4% and 3.9%, respectively.



Chains That Are Becoming The Final C-Store Destinations

Each in its own way, **Casey's**, **Maverik, Buc-ee's**, and **Rutter's**, are helping to transform C-Stores from pit stops where people can stretch their legs and grab a cup of coffee to destinations in and of themselves.

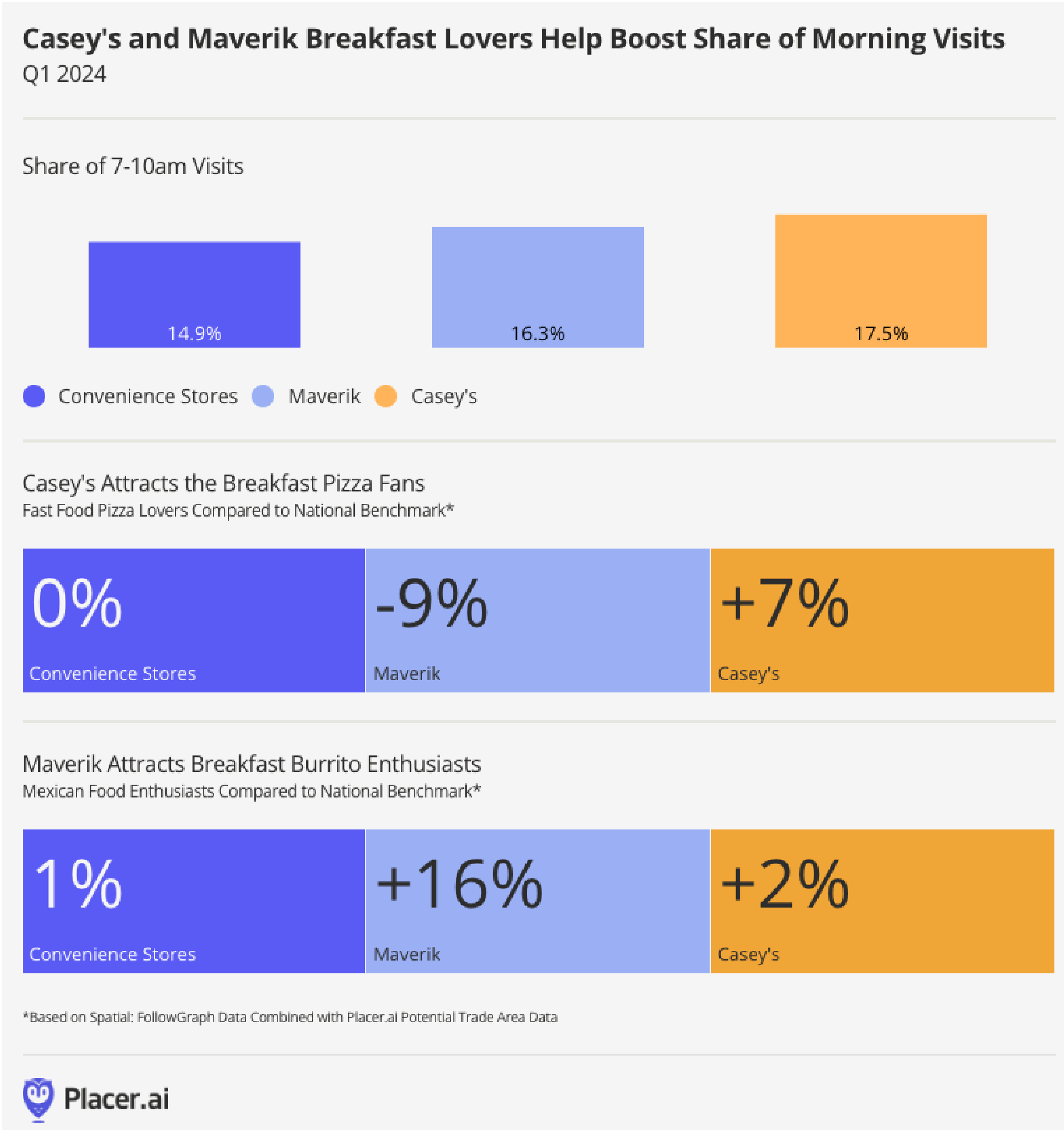
Casey's & Maverik: Leaning into Breakfast

Midwestern gas and c-store chain **Casey's** – famous for its breakfast pizza and other grab-and-go breakfast items – has emerged as a prime spot for fast food pizza lovers to grab a slice first thing in the morning. And Salt Lake City, Utah-based **Maverik** – which recently acquired Kum & Go and its 400-plus stores – is also establishing itself as a breakfast destination thanks to its specialty burritos and other chef-inspired creations.

Casey's and **Maverik**'s popular breakfast options are likely helping the chains receive its larger-than-average share of morning visits: In Q1 2024, 16.3% of visits to Maverik and 17.5% of visits to Casey's took place during the 7:00 AM - 10:00 AM daypart, compared to just 14.9% of visits to the wider C-Store category.

Psychographic data from the Spatial.ai's FollowGraph dataset – which looks at the social media activity of a given audience – also suggests that **Casey's** and **Maverik**'s have opened stores in locations that allow them to reach their target audience. Compared to the average consumer, residents of **Casey's** potential market are 7% more likely to be "Fast Food Pizza Lovers" than both the average consumer and the average C-Store trade area resident. Residents of **Maverik**'s potential market are 16% more likely than the average consumer to be "Mexican Food Enthusiasts," compared to residents of the average C-Store's trade area who are only 1% more likely to fall into that category.

With both [chains](#) [expanding](#), **Casey’s** and **Maverik** can hope to introduce new audiences to their unique breakfast options and solidify their hold over the morning daypart within the C-Store space over the next few years.

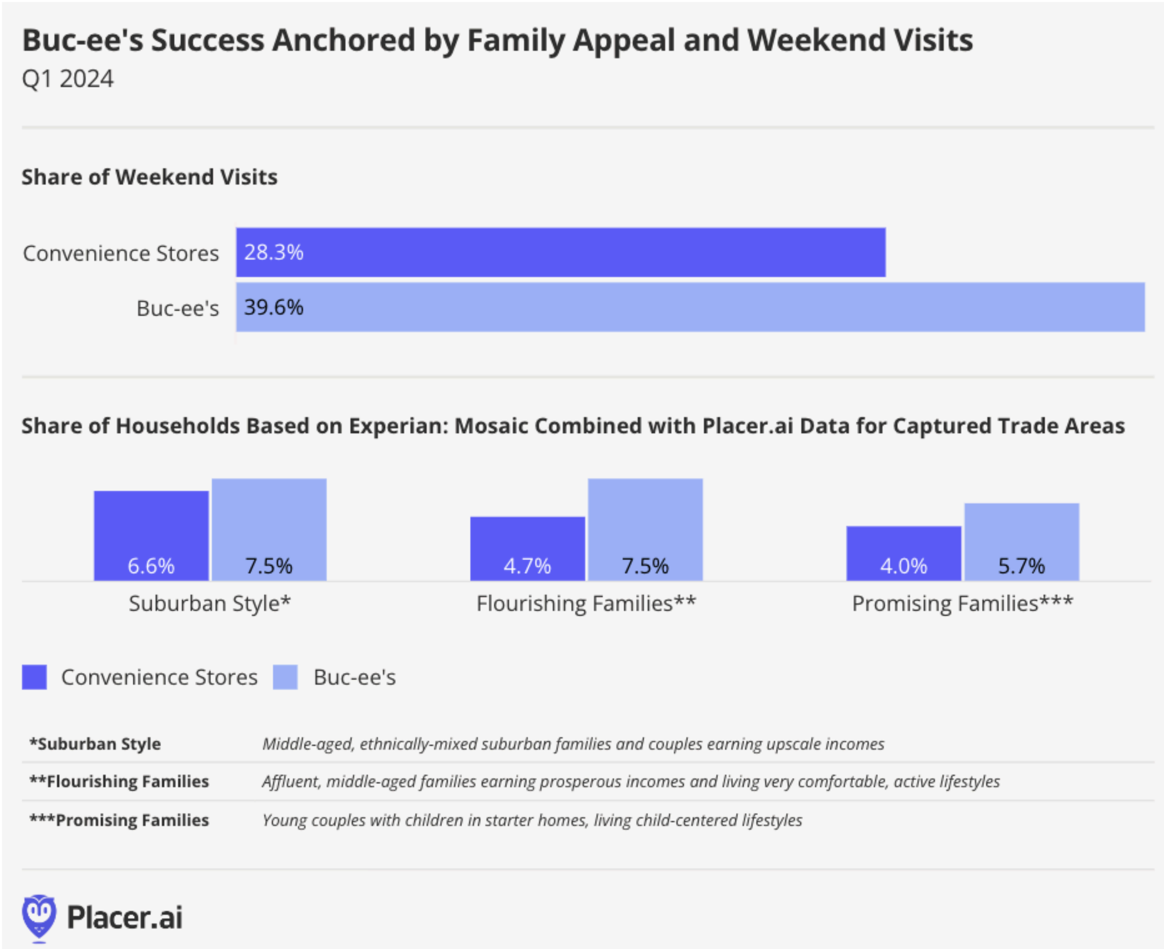


Buc-ee's: Bigger Is Better

Everything is said to be bigger in the Lone Star State, and Texas-based convenience store chain **Buc-ee's** – holder of the record for the worlds' largest C-Store – is no exception. With a unique array of specialty food items and award-winning bathrooms, **Buc-ee's** has emerged as a well-known tourist attraction. And the popular chain's status as a visitor hotspot is reflected in two key metrics.

First, **Buc-ee's** attracts a much greater share of weekend visits than other convenience store chains. In Q1 2024, 39.6% of visits to **Buc-ee's** took place on the weekends, compared to just 28.3% for the wider C-Store industry. And second, **Buc-ee's** captured markets feature higher-than-average shares of family-centric households – including those belonging to Experian: Mosaic's Suburban Style, Flourishing Families, and Promising Families segments.

Rather than merely a place to stop on the way to work, **Buc-ee's** has emerged as a favored destination for families and for people looking for something fun to do on their days off.

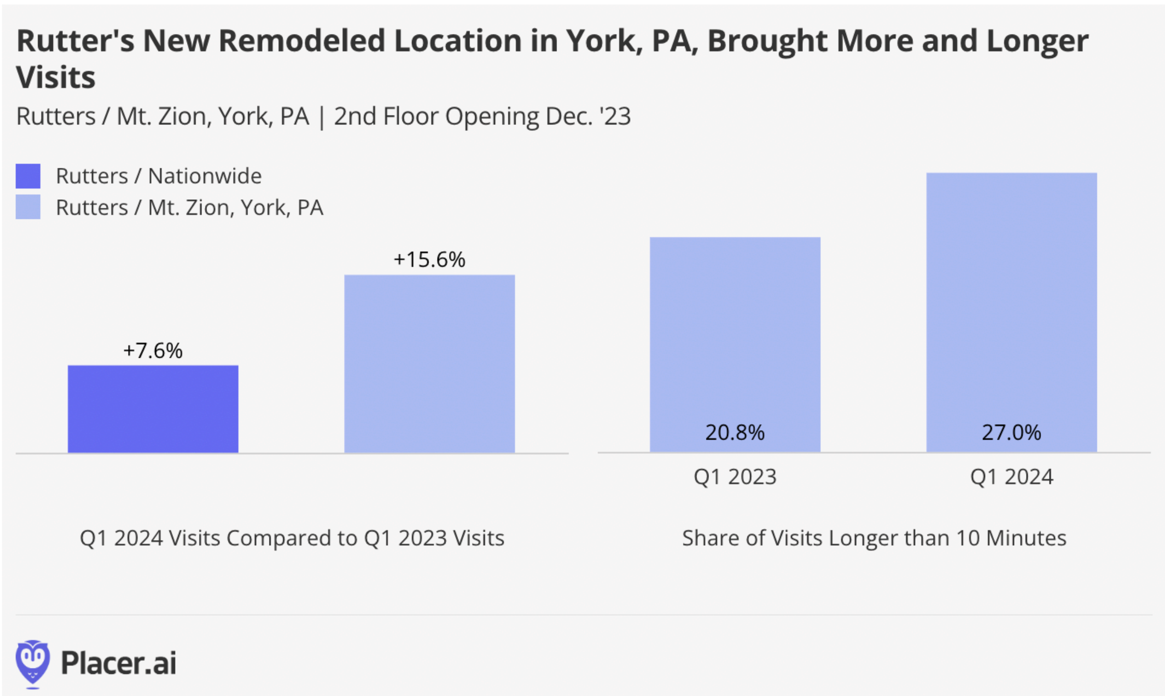


Rutter's: Expanding Upward

Buc-ee's isn't the only C-Store chain that believes bigger is better. Pennsylvania-based **Rutter's** is increasing visits and customer dwell time by expanding its footprint – both in terms of store count and venue size. New stores will be 10,000 to 12,000 square feet – significantly larger than the industry average of around 3,100 square feet. And in more urban areas, where space is at a premium, the company is building upwards.

Rutter's added a second floor to one of its existing locations in York, PA in December 2023. The remodel, which was met with enthusiasm by customers, provided additional seating for up to 30 diners, a beer cave, and an expanded wine selection.

And in Q1 2024, the location experienced 15.6% YoY visit growth – compared to a chainwide average of 7.6%. Visitors to the newly remodeled **Rutter's** also stayed significantly longer than they did pre-renovation. The share of extended visits to the store (longer than ten minutes) grew from 20.8% in Q1 2023 to 27.0% in Q1 2024 – likely from people browsing the chain's selection of beers or grabbing a bite to eat.



Convenience At Every Corner

Convenience stores are flourishing, transforming into some of the most exciting dining and tourist destinations in the country. Today, C-Store customers can expect to find brisket sandwiches or craft beers, rather than the stale cups of coffee of old. And the data shows that customers are receptive to these innovations, helping drive the segment's success.

