

ACSI® Convenience Store Study 2024

October 1, 2024



American Customer
Satisfaction Index



Amid Tight Battle for Customer Satisfaction Supremacy, Wawa Comes Out on Top in Inaugural Convenience Store Study

Convenience stores are investing in enhancements to the customer experience by adding more customized food offerings, larger merchandise selections, enticing rewards programs, and mobile ordering services. Customers have taken notice, paving the way for increased competition between convenience stores and more traditional foodservice outlets. Despite an unprecedented drop off in travel during the pandemic, in-store sales for convenience retailers have risen every year since 2017. The reshaping of the convenience store model to shift focus from vehicle refueling to food and merchandise shopping amplifies the importance for companies to understand customer preferences and what elements of the experience drive higher satisfaction.

CONVENIENCE
STORES

76

The inaugural ACSI measurement of convenience stores reveals that brands fully embracing the model of one-stop shopping—including an extensive array of food options, merchandise, and valuable rewards programs—have the highest levels of customer satisfaction. Wawa, famous for its made-to-order hoagies and plentiful hot breakfast selection, leads a long list of competitors including second-place QuikTrip and third-place Buc-ee's and Murphy USA (tied).

ACSI results are based on surveys conducted over a 7-month period ending in September 2024. ACSI scores are reported on a 0 to 100 scale.

Key Takeaways

CONVENIENCE STORES

- Convenience stores have emerged as a key competitor in the foodservice landscape. Top companies score well for food quality and variety as they lean into custom food offerings and signature dishes, while sales of previous staples like tobacco decline.
- For convenience stores, fuel sales—famous for their razor-thin profit margins—are being diminished further with the rise of electric vehicles, enhancing the focus on the in-store experience.
- Loyalty reward programs play a critical role for convenience stores as members are more satisfied, perceive higher value, visit more frequently, and are more likely recommend the store to others compared to nonmembers.
- Industry leaders Wawa (82), QuikTrip (81), Buc-ee's (80), and Murphy USA (80) receive high marks across several key aspects of the customer experience with varying success for attributes like cooked food quality, checkout speed, and mobile apps.
- Mobile apps play a prominent role for many customers, with 34% of ACSI survey respondents indicating that they have used a convenience store's mobile app to place an order.

Study Findings

Customer satisfaction is a driving force that impacts the financial outlook of individual firms and the health of the U.S. economy at large. New results from the American Customer Satisfaction Index (ACSI®) provide inaugural customer satisfaction benchmarks for the convenience store industry. The ACSI also captures consumer opinions about critical elements of the customer experience, tailored specifically to the convenience store industry.

CONVENIENCE STORES

The convenience store industry debuts in the ACSI with an overall score of 76. From top to bottom, there is an 8-point difference in customer satisfaction between leader Wawa (82) and last-place Shell (74), indicating a wide disparity in the customer experience at the company level. Many of the chains that find themselves at the high end of the satisfaction scale have prioritized serving up a robust set of food options. The aforementioned hoagies are a big draw for Wawa customers, QuikTrip is on a mission to install QT Kitchens® across the chain, and Buc-ee's has a well-established reputation for its wide variety of on-the-go food options, including hot barbeque and jerky. Casey's General Stores, with a satisfaction score of 79, is a go-to option in the Midwest for pizza, both traditional and breakfast varieties, and it is now America's fifth largest pizza purveyor by number of kitchens.

Nearly all reported chains have scores exceeding the industry average as lower satisfaction with the aggregate of smaller and/or independent chains drags down the overall industry score. The "all others" group accounts for a sizeable portion of the convenience store industry and its satisfaction score of 75 narrowly avoids being the lowest rating, which belongs to Shell. Also scoring on the low end, the nation's largest convenience store chain 7-Eleven comes in at 75.

AMERICAN CUSTOMER SATISFACTION INDEX:
CONVENIENCE STORES
0-100 Scale

COMPANY	2024 ACSI
Convenience Stores	76
Wawa	82
QuikTrip	81
Buc-ee's	80
Murphy USA	80
Casey's General Stores	79
Sheetz	79
Kwik Trip	78
BP	77
Cumberland Farms	77
Speedway	77
Circle K	76
RaceTrac	76
7-Eleven	75
All Others	75
Shell	74

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Customer Satisfaction by Region

The ACSI's initial analysis shows that at the regional level, Wawa performs well in both of its primary markets, taking first place for customer satisfaction in the Northeast (83) and second in the South (81). Buc-ee's wins the South region with an ACSI score of 83, while Sheetz trails Wawa by 2 points in the Northeast. In the Midwest, homophones QuikTrip (83) and Kwik Trip (80) lead all other stores in the region. Satisfaction levels in the West trail other regions by a sizeable margin. A fragmented market led to fewer individual brands attaining sufficient data to report regional-level results. Here, 7-Eleven and Circle K, both with large footprints, tie for the top spot at 72.

AMERICAN CUSTOMER SATISFACTION INDEX:
CONVENIENCE STORES
Customer Satisfaction Leaders by Region
0-100 Scale

COMPANY	REGIONAL ACSI
NORTHEAST	
Wawa	83
Sheetz	81
MIDWEST	
QuikTrip	83
Kwik Trip	80
SOUTH	
Buc-ee's	83
Wawa	81
WEST	
7-Eleven	72
Circle K	72

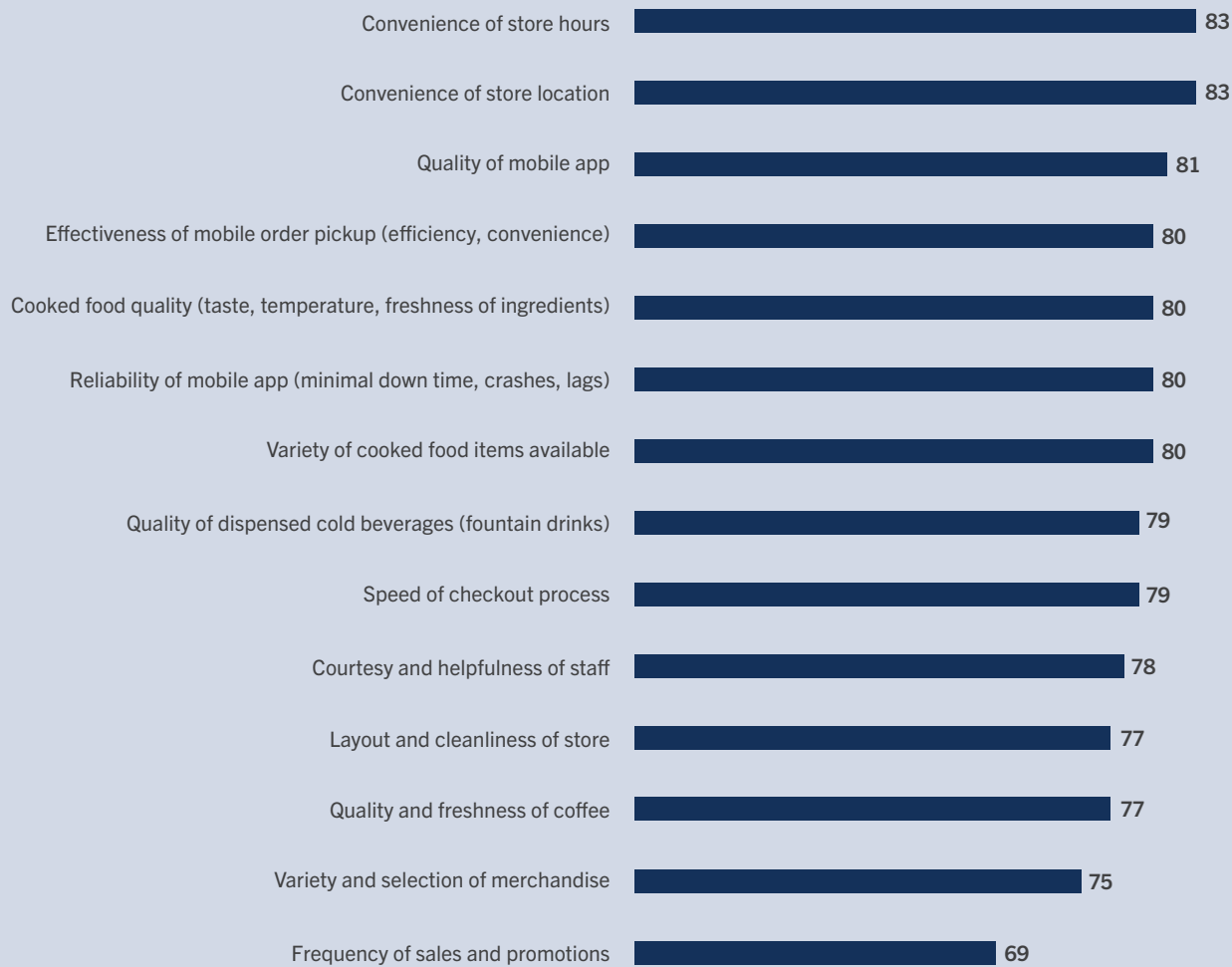
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Despite all of the innovations amid the changing landscape of the industry, convenience stores maintain their core function—convenience! Across the customer experience, convenience of hours and store location receive the highest ratings (83) at the industry level. Among the 34% of respondents who report using a store’s mobile app for ordering, their strong ratings of 81 (app quality) and 80 (order pickup effectiveness and app reliability) show that mobile apps are a valuable transaction channel which further enhances customer convenience.

Many of the CX metrics measured for the convenience store study overlap with attributes from foodservice-based studies, providing useful comparisons for these emerging competitors. For example, while the convenience store average score of 80 for cooked food quality trails behind the fast food industry (84), the top-performing stores are able to compete with fast food chains on food quality. It is a similar story with food variety. Overall, convenience stores (80) lag 2 points behind the fast food industry, but the top performers from both categories have food variety scores that are closely aligned with each other.

The lowest-scoring metrics for convenience stores, variety and selection of merchandise (75) and frequency of sales and promotions (69), trail behind the same scores for general merchandise retailers of 79 and 75, respectively. This is logical given the built-in size limitations of many convenience stores and the understood trade-off between convenience and price for those shopping at convenience stores.

AMERICAN CUSTOMER SATISFACTION INDEX:
CONVENIENCE STORES
Customer Experience Benchmarks 2024
0-100 Scale



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Customer Satisfaction and Loyalty Reward Programs

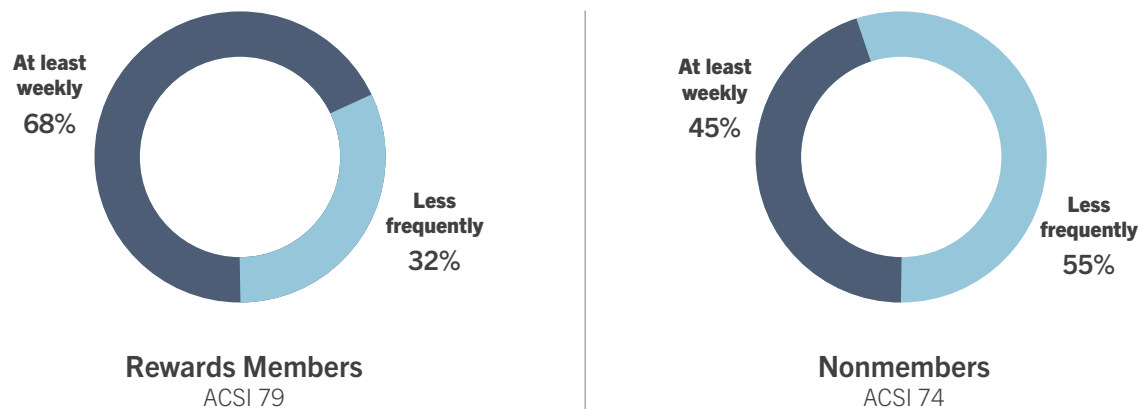
Convenience stores are battling for rewards members as these loyalty programs play a critical role in customer satisfaction, the customer experience, and the rate of visiting. Over half (51%) of all respondents indicate that they are rewards members of the store they visited. In terms of visit frequency, over two-thirds (68%) of members report that they visit the store they rated at least weekly, compared to just 45% of nonmembers.

Rewards members give notably higher ACSI marks for their convenience store experiences than nonmembers. Overall, there is a 5-point difference in customer satisfaction for members (79) versus nonmembers (74). Value perceptions (which do not factor in fuel) are significantly higher for rewards members, and they are much more likely to recommend the store to others compared to nonmembers.

AMERICAN CUSTOMER SATISFACTION INDEX:

CONVENIENCE STORES

Loyalty Program Status and Visit Frequency



0-100 Scale

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Across the entire customer experience, rewards members view their visits more favorably. Most notably, members rate the frequency of sales and promotions a full 10 points higher (74) than nonmembers (64), which further demonstrates the value of rewards programs. Rewards members, who use store apps more frequently (59% compared to just 9% of nonmembers), are also much happier with the app experience.

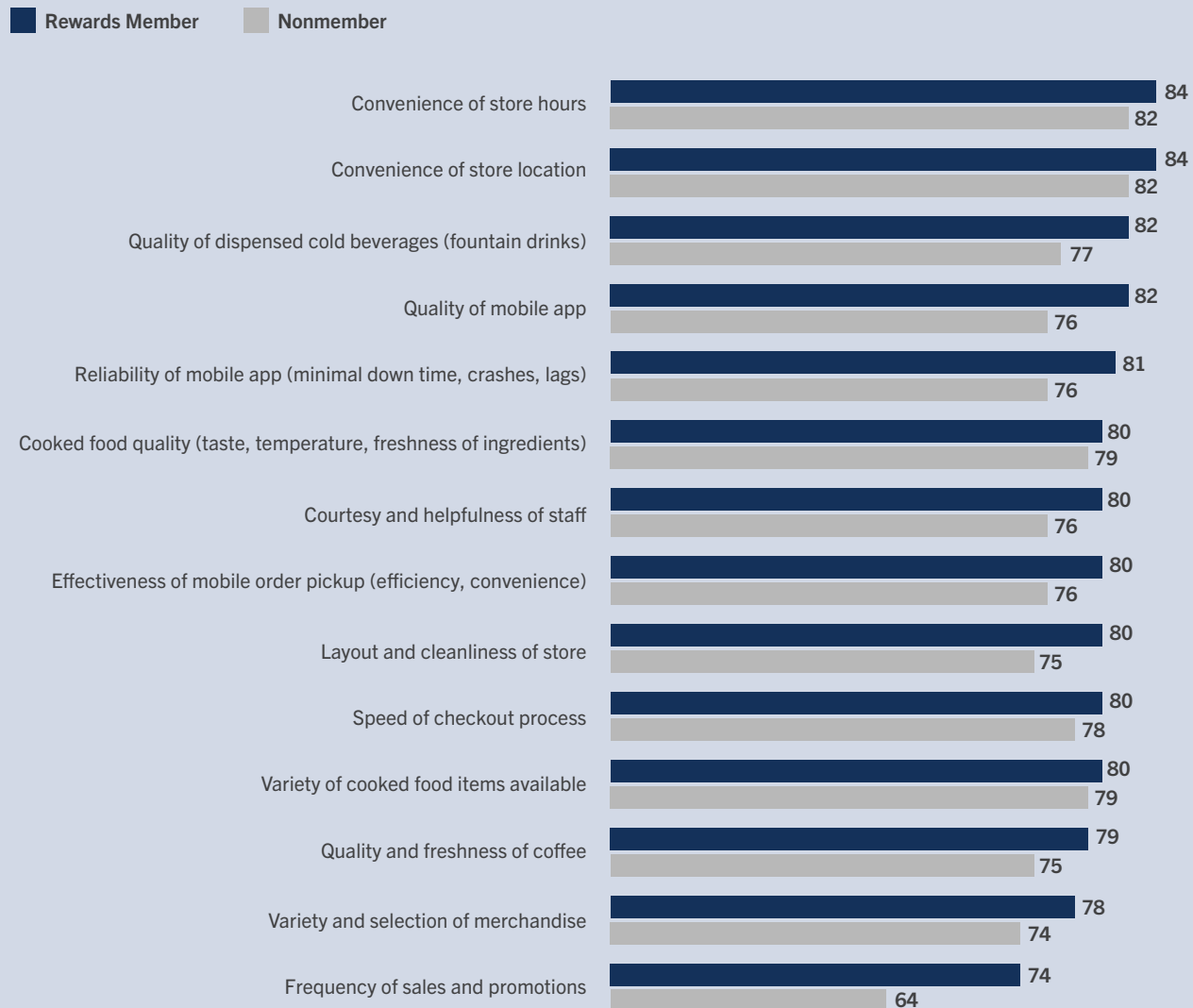
Loyalty reward programs provide a clear opportunity for convenience stores to offer customers what they want, provide value through exclusive sales and discounts, and ultimately build loyalty and brand advocacy.

AMERICAN CUSTOMER SATISFACTION INDEX:

CONVENIENCE STORES

Customer Experience Benchmarks by Loyalty Program Status 2024

0-100 Scale

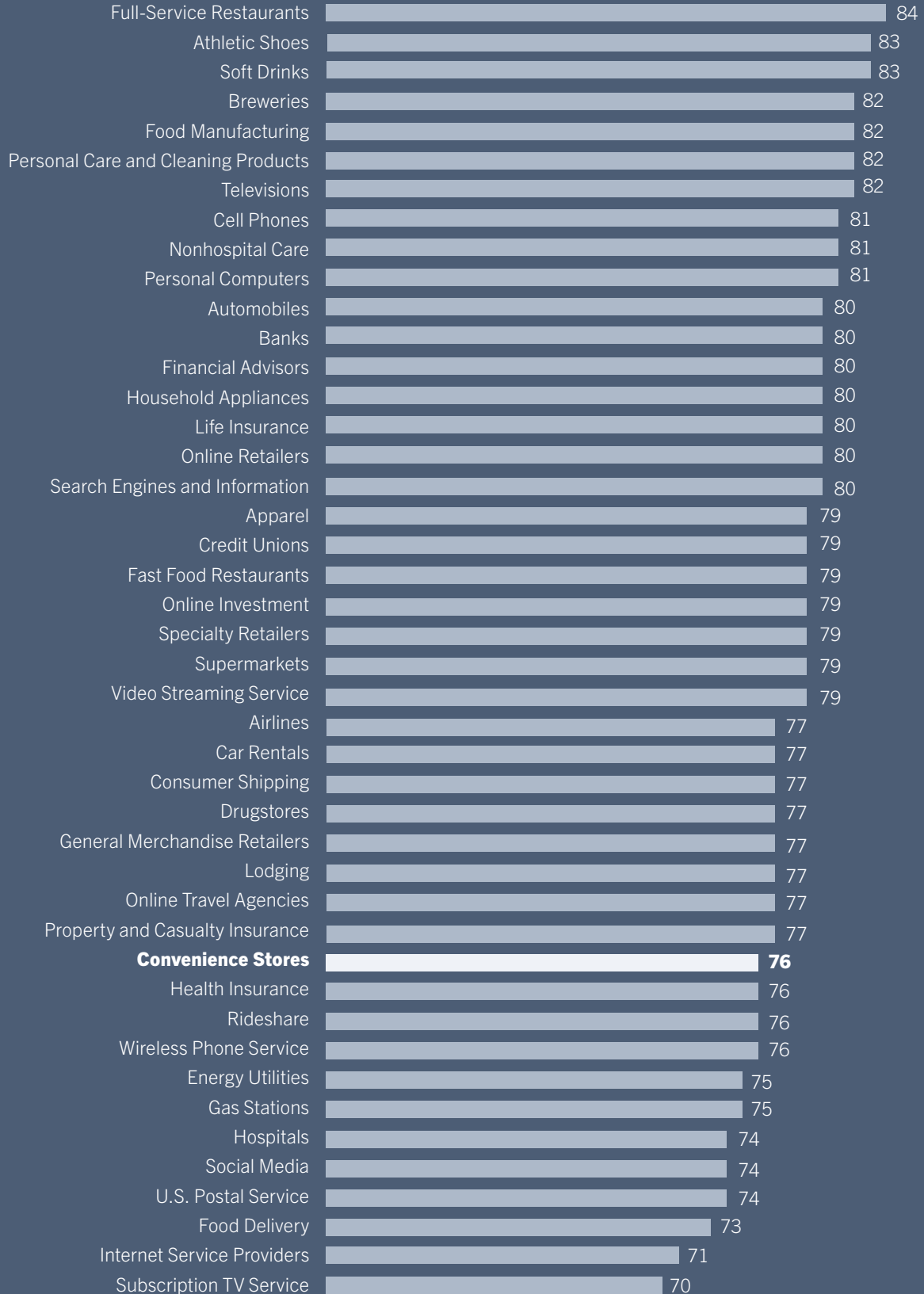


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AMERICAN CUSTOMER SATISFACTION INDEX (ACSI®):
Customer Satisfaction Benchmarks by Industry

0-100 Scale



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Methodology

The **ACSI Convenience Store Study 2024** is based on 5,710 completed surveys. Customers were chosen at random and contacted via email between March and September 2024. Customers are asked to evaluate their recent experiences with the largest companies in terms of market share, plus an aggregate category consisting of “all other”—and thus smaller—companies.

ACSI survey data are used as inputs to the Index’s cause-and-effect econometric model, which estimates customer satisfaction as the result of the survey-measured inputs of customer expectations, perceptions of quality, and perceptions of value. The ACSI model, in turn, links customer satisfaction with the survey-measured outcomes of customer complaints and customer loyalty. ACSI clients receive confidential industry-competitive and best-in-class data on all modeled variables and customer experience benchmarks.

About ACSI

The American Customer Satisfaction Index (ACSI®) is a national economic indicator of customer evaluations of the quality of products and services available to household consumers in the United States. The ACSI uses data from roughly 200,000 responses annually as inputs to an econometric model for analyzing customer satisfaction with approximately 400 companies in about 40 industries and 10 economic sectors, including various services of federal and local government agencies. ACSI results are released throughout the year, with all measures reported on a scale of 0 to 100.

ACSI data have proven to be strongly related to several essential indicators of micro and macroeconomic performance. For example, firms with higher levels of customer satisfaction tend to have higher earnings and stock returns relative to competitors. Stock portfolios based on companies that show strong performance in ACSI deliver excess returns in up markets as well as down markets. At the macro level, customer satisfaction has been shown to be predictive of both consumer spending and GDP growth.

Contact Information

For more information regarding this study, the convenience store industry, and how the ACSI can help your company harness the power of customer satisfaction to improve your bottom line, visit www.theacsi.org or contact:

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