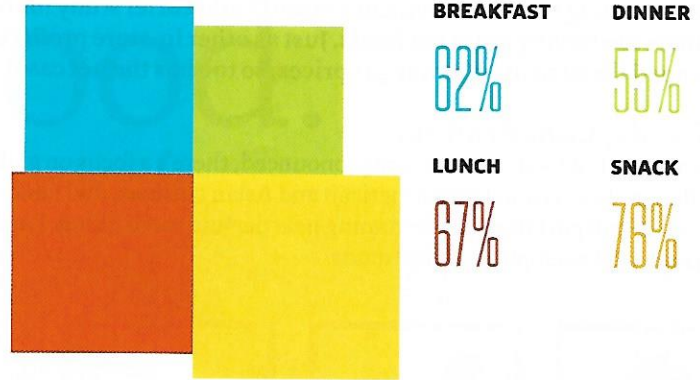


Trends and Tendencies, Meal by Meal

When They're Buying

It's clear that the average customer visits c-stores for multiple dayparts, and breakfast and lunch are prime time slots. But occasions may matter more than strict dayparts, because snacking now represents the biggest opportunity for growth of hot foods. More than three out of four guests purchase hot snacks from c-stores—more than breakfast, lunch or dinner.

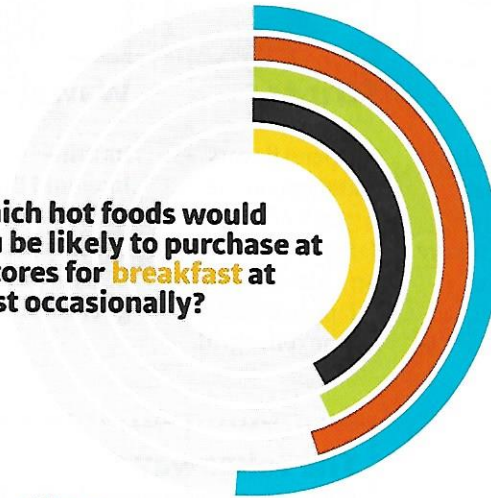
Monthly hot-food purchases by daypart



What They're Choosing

Breakfast sandwiches reign supreme in the morning, while pizza is the top choice for lunch and dinner. Hot sandwiches are the second-most-frequently ordered lunch entree, and chicken is rising fast: It's now tied with pizza as the leading option for dinner.

Which hot foods would you be likely to purchase at c-stores for **breakfast** at least occasionally?



Retailer Gut Check

Bolder, more pronounced flavors are adding a mark of differentiation for guests at The Hub, especially in the morning. "On the breakfast side, it seems to be the **spicier offerings that get the most traction**," says Scheeler. "From our jalapeno cheddar biscuit to our Southwest steak breakfast burrito, all of our Tex-Mex flavor options are performing well."

The Takeaway

Look for ways to make pizza, sandwiches and chicken continuously compelling. Promote preparations with more robust pizza and sandwich sauces, limited-time offers and versatile offerings that can also be snacks. Continue to crack the code on dinner. Consider surveying customers on their dinner habits and what might make them consider you as an evening meal destination.



Which hot foods would you be likely to purchase at c-stores for **lunch/dinner** at least occasionally?

ITEM	LUNCH	DINNER
Pizza	50%	49%
Hot sandwich	47%	46%
Chicken strips/nuggets/wings	46%	49%
French fries/onion rings	43%	38%
Hot dog	36%	40%

Source: Technomic Q2 2016 Convenience Store MarketBrief