

25 February 2025

Forecourts now and next: Consumer perspective

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Agenda



Consumer mindsets



Differentiation



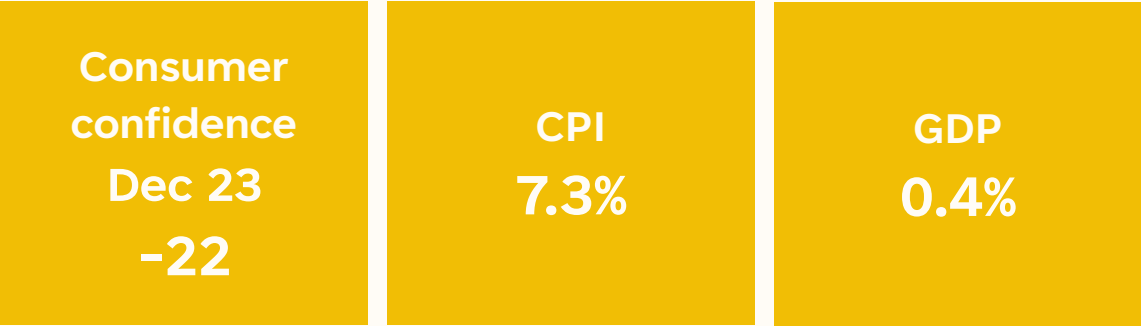
EV and the future

Source: Lumina Intelligence, February 2025



Improved inflation has done little to improve consumer sentiment and spending

2023



2024



Consumer confidence remains low as 'uncharitable view' of UK economy persists

GfK survey shows room for optimism on personal finances but people thinking twice about big-ticket purchases



Source: Lumina Intelligence, GfK, ONS, Asda Income Tracker

Most consumers keep a close watch on prices



75% of car owners keep a watch on their local forecourt for what they charge



55% of those car owners would drive up to five miles to buy cheaper fuel

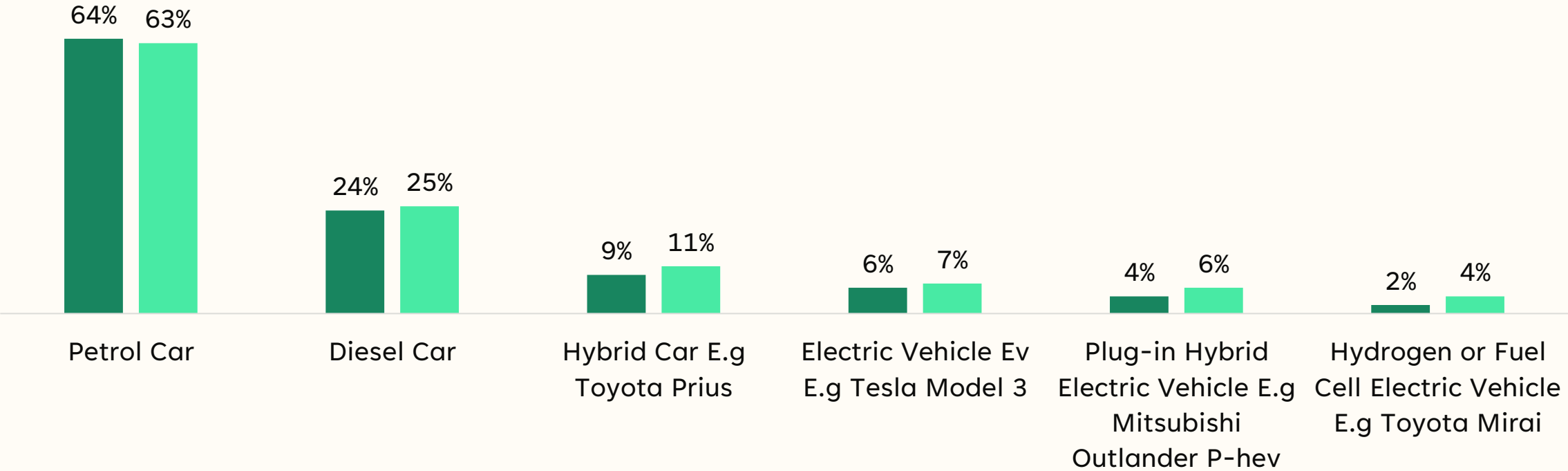
Source: Lumina Intelligence Forecourt Consumer Survey 2025

There hasn't been a big surge towards EV this year. 2/3 of drivers still own a petrol car



Do you own a car, and if so, what type of car is it?

2024 2025

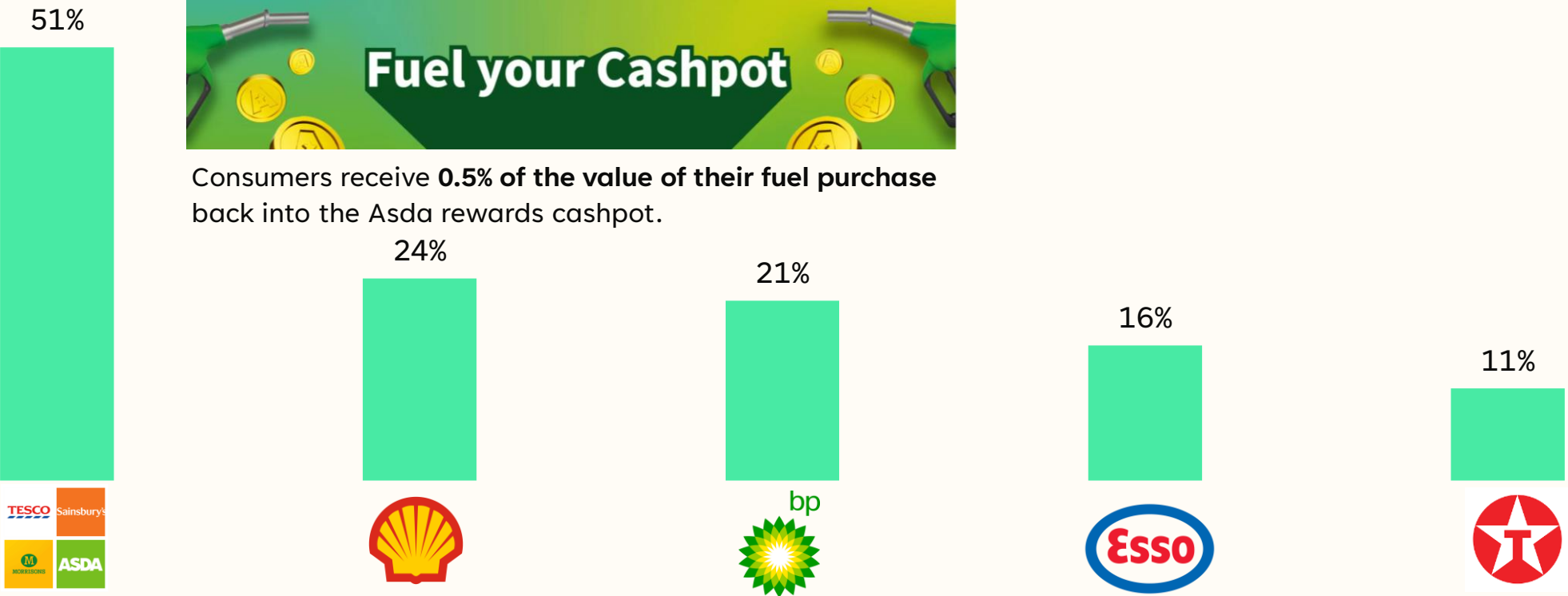


Source: Lumina Intelligence Forecourt Consumer Survey 2025

Drivers frequent supermarkets most often – with rewards on offer



What brand of petrol station do you usually use to re-fuel/ EV charge your car? (Top five)

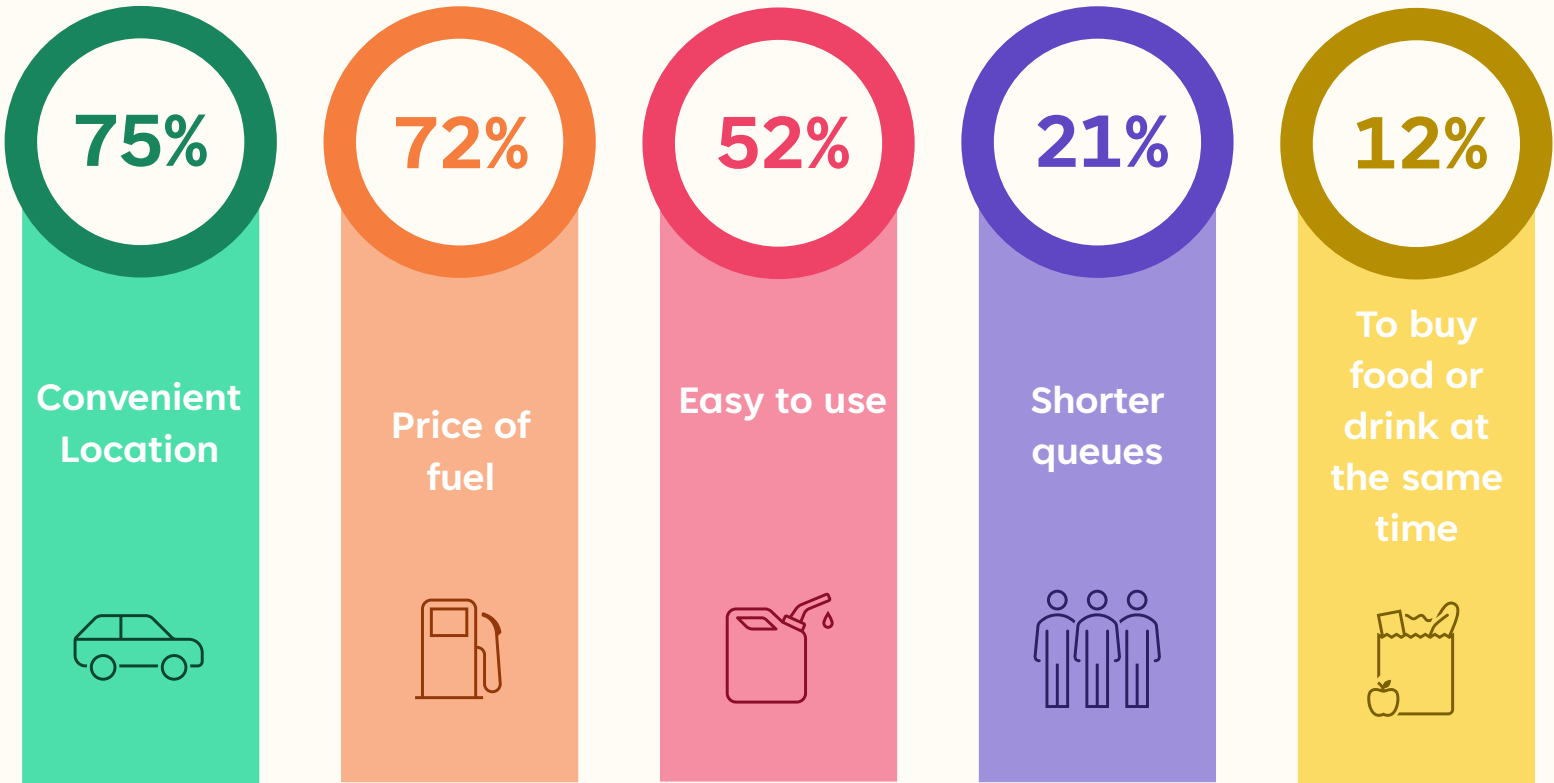


Source: Lumina Intelligence Forecourt Consumer Survey 2025

Price is top of mind



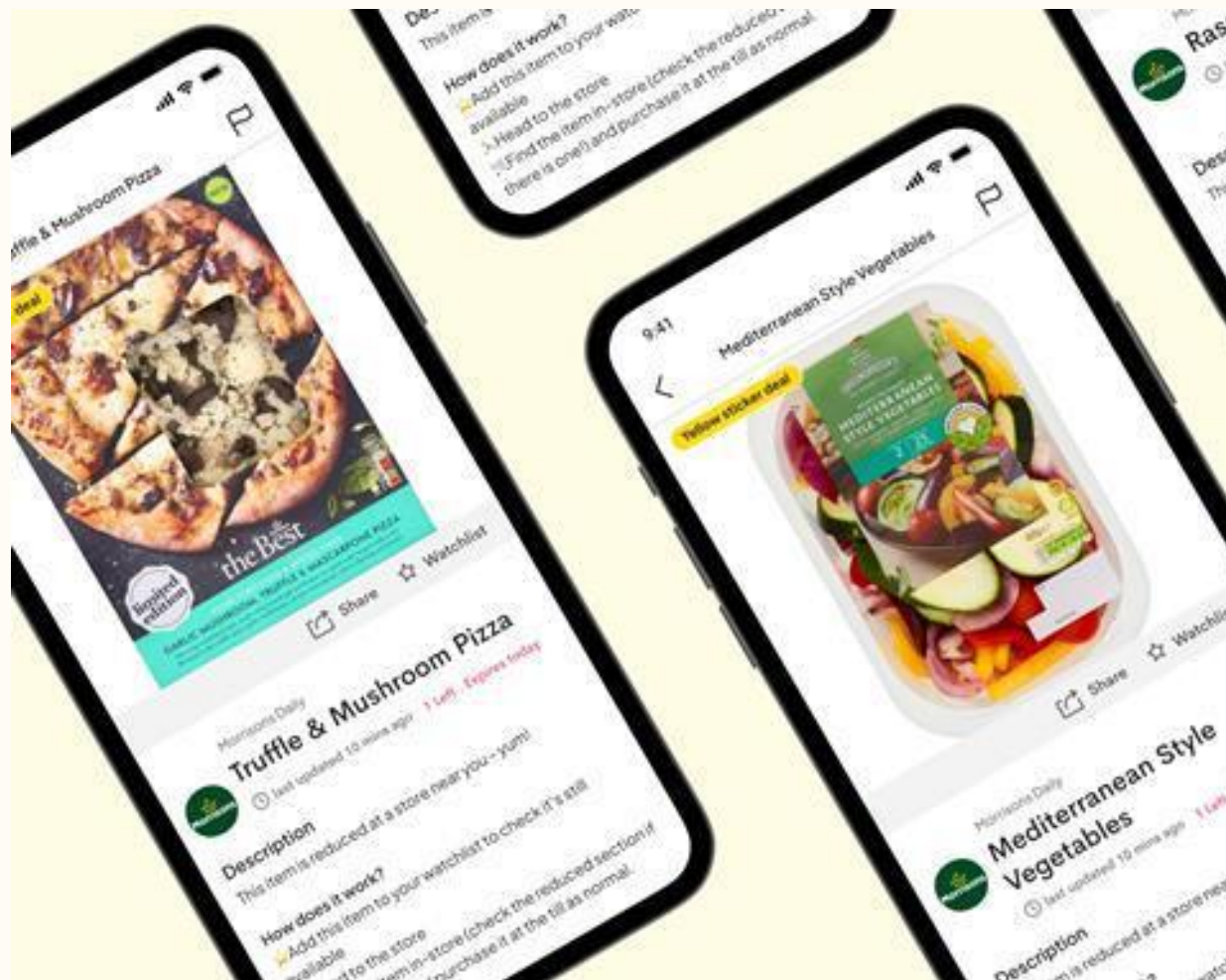
What are the reasons behind your choice of petrol station brand / forecourt?



Source: Lumina Intelligence Forecourt Consumer Survey 2025

Money saving initiatives expand

Gander partnered with **The C Store Collective** to bring waste reducing technology to forecourts. The Gander platform displays all reduced to clear food on the shelves in their local store to reduce food wastage and entice consumers in with lower, real time prices

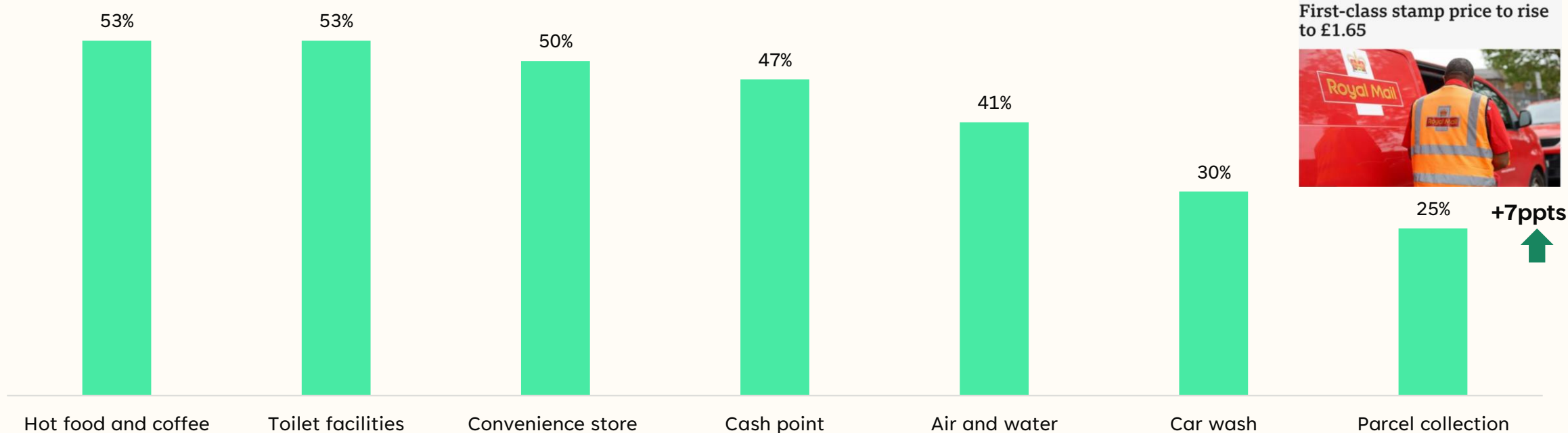


Source: talkingretail.com

Parcel collection soars and provides higher footfall opportunities



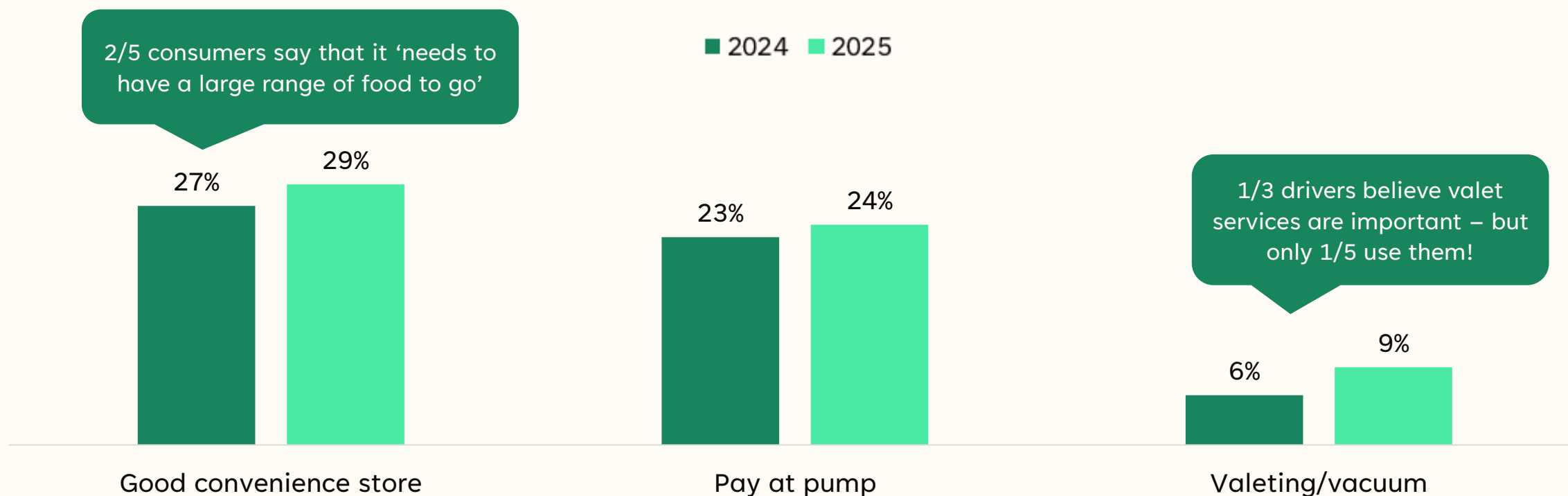
What are the reasons you would stop at a forecourt if you do not need to charge/fuel your car?



Source: Lumina Intelligence Forecourt Survey 2025

The importance of the convenience store heightens – emerging opportunity to bring consumers in through valet

What services would you like to see more of in forecourts? – top movers year on year



Source: Lumina Intelligence Forecourt Survey 2025

Expanding drinks choices extends consumer reach



Costa partnered with Shell to allow 'costamisation' at forecourts across the UK.

Source: Forecourt Trader

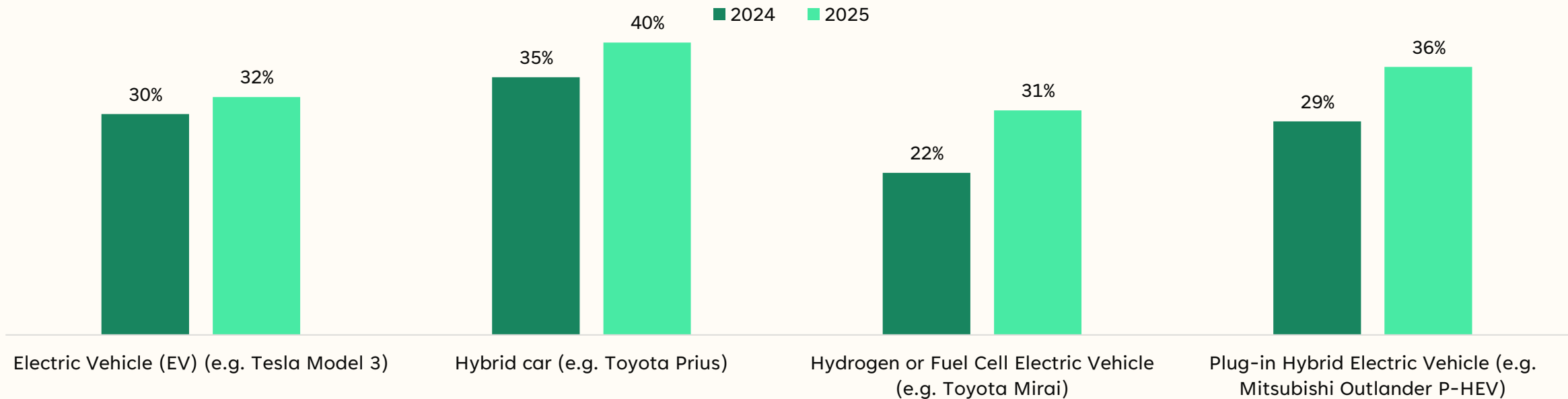


Wellness alternatives rise
Rontec launched **Trip CBD** drinks

Interest in alternatives grows



Thinking about buying a car in the future, how interested would you be in buying the following types of cars?

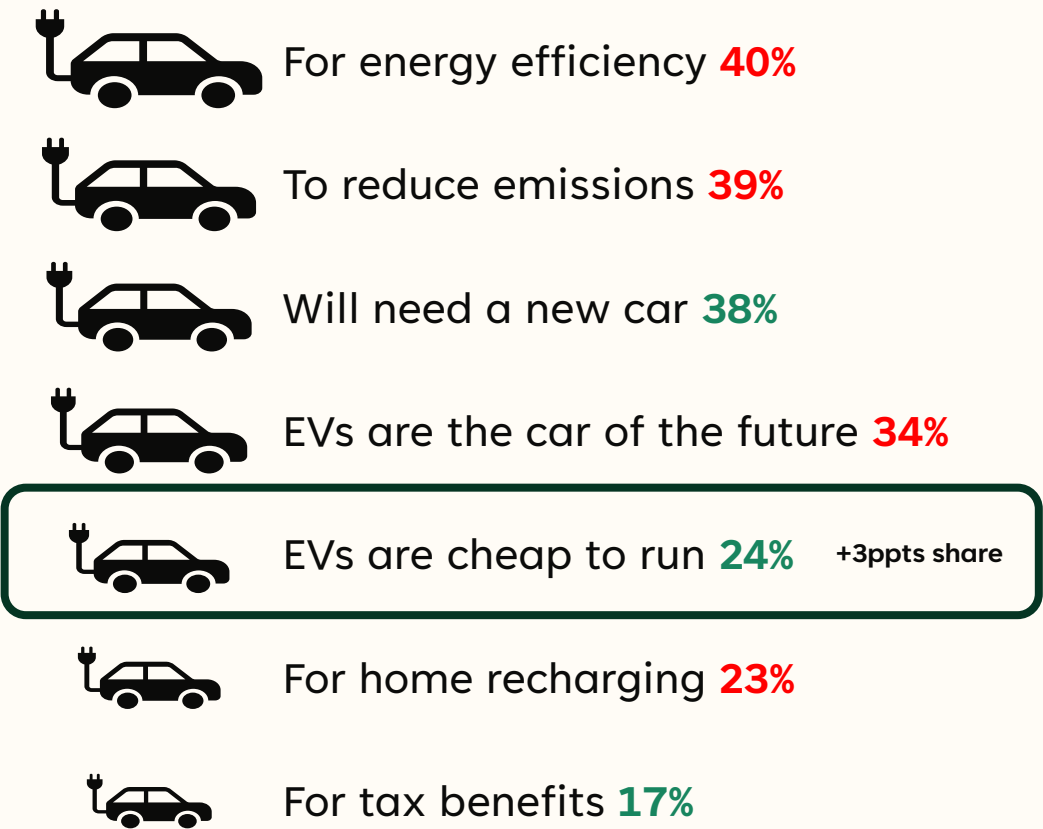


Source: Lumina Intelligence Forecourt Survey 2025

EV interest motivated more this year by beliefs of cheaper running costs



Which of the following, if any, are reasons why you think you might buy an EV in the future? (multi-select)



Source: Lumina Intelligence Forecourt Survey 2025

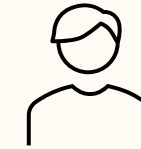


Future EV owners will be price and family conscious

Consumers who would buy EVs as they're cheap to run



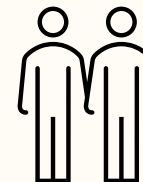
Male
58%



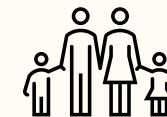
Age 25-44s
46%



West Midlands
12%



ABC1s
61%



Lives with their
partner and
children
43%

Source: Lumina Intelligence Forecourt Survey 2025

Key take-outs



Consumer mindsets

Price is top of mind for consumers – as supermarkets lead in pulling in footfall.



Differentiation

Food to go in a good convenience store will be paramount ongoing.

Valeting emerging as a bigger need for consumers – could take advantage of increased dwell times.



EV and the future

Interest in alternatives grows.

EV interest powered more by cheaper running costs among millennial families.

Source: Lumina Intelligence, February 2025

**To learn more about how Lumina Intelligence can support you,
please get in touch using the contact details provided below.**

Get in touch

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