

Lumina Intelligence

25 February 2025

# Forecourts now and next: Operator perspective

Blonnie Whist



# Agenda



Trading conditions



Expansion of traditional services



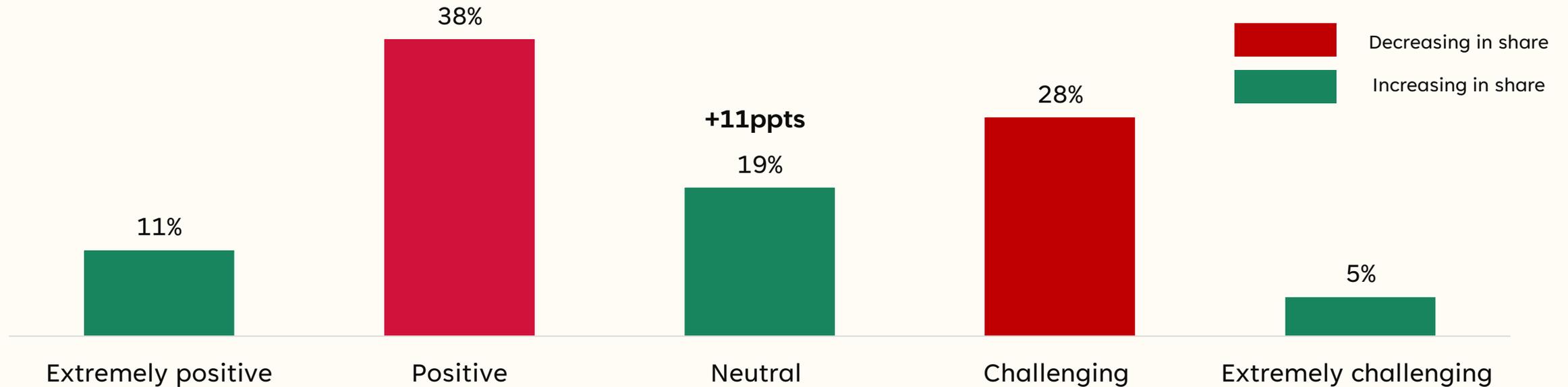
EV and the future

Source: Lumina Intelligence, February 2025



# Market sentiment has naturalised

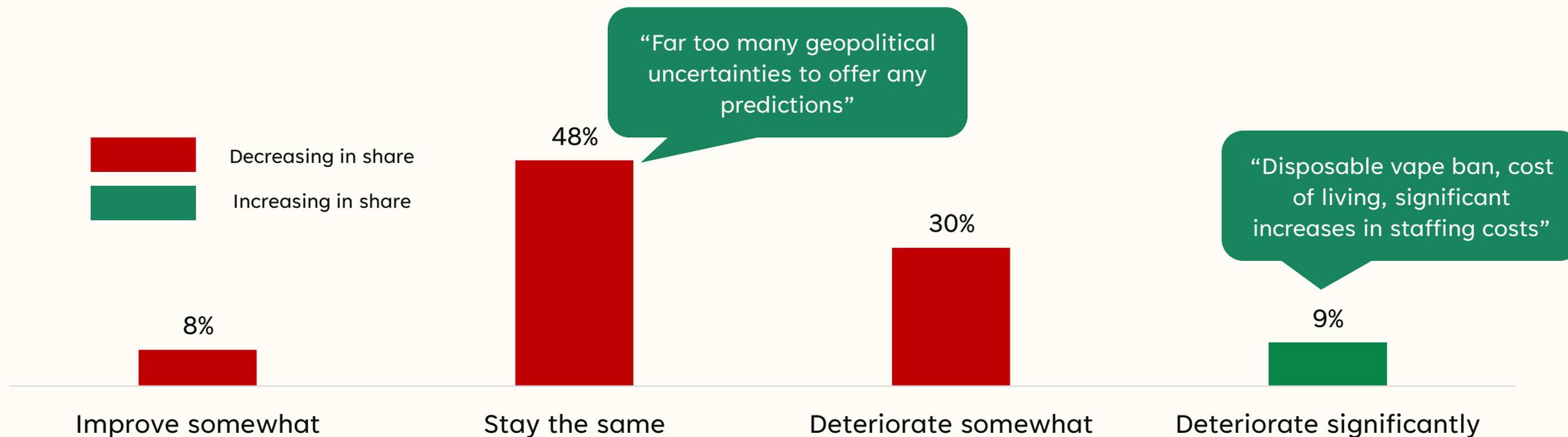
How would you describe the current trading environment in the forecourt sector?



Source: Lumina Intelligence Forecourt Operator Survey 2025

# Geopolitical factors lead to uncertainty, but scepticism rises due to the disposable vape ban and costs rising from Autumn budget

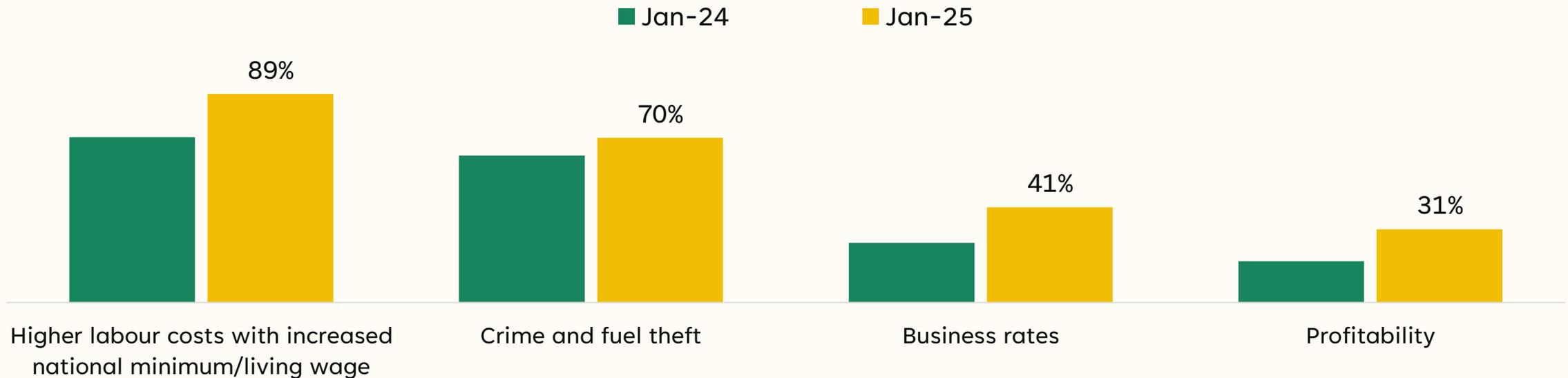
How do you expect trading conditions to develop in the next 12 months



Source: Lumina Intelligence Forecourt Survey 2025

# Cost and crime remain the top two challenges facing operators – both increasing in importance too

What in your view are the **most important business challenges** facing your company **currently**?



Source: Lumina Intelligence Forecourt Survey 2025

# Retail stores roll out increased security measures

New ONS figures claim shoplifting offences are now the highest since figures began in 2003.

Convenience operators are introducing new and innovative measures. Poundland is rolling out body cameras for staff in stores, as well as more undercover security and a specialised market campaign to make consumers aware.

Source: ONS, London Evening Standard

## Shoplifting soars in England and Wales by staggering amount

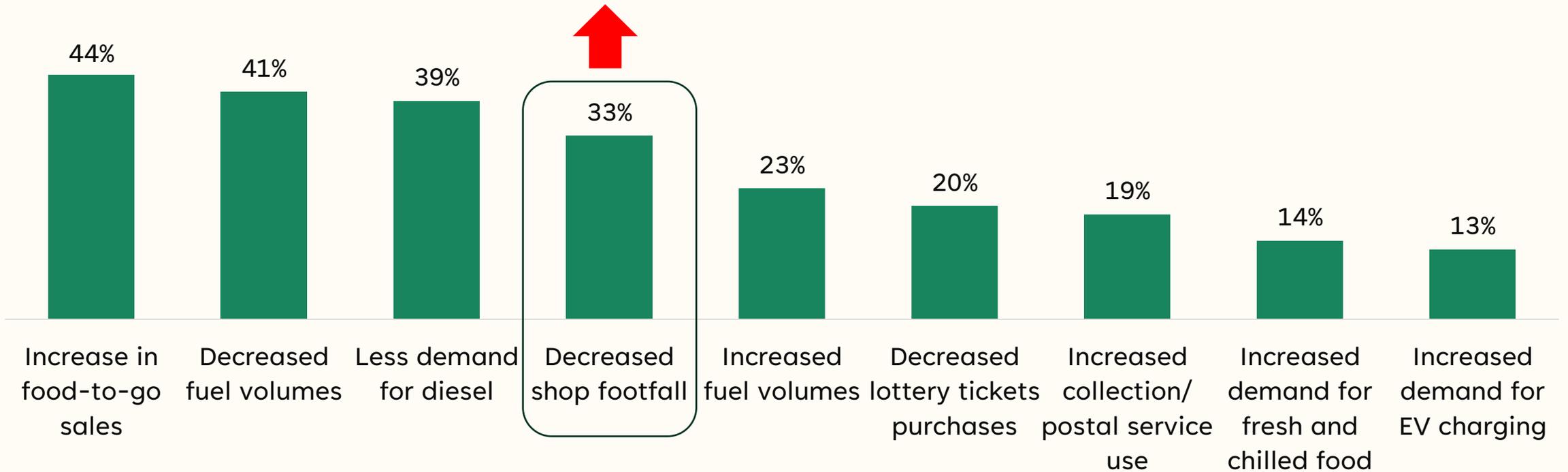
Police recorded the equivalent of 1,350 shoplifting offences every day in the year to September 2024, new Office for National Statistics figures show

Poundland Cracks Down On Store Crime With New Campaign



# Bringing people into store is proving trickier

What are the biggest changes you have seen in your business in the last 12 months?



Source: Lumina Intelligence Forecourt Survey 2025

# Service options are expanding beyond regular offerings – offering shoppers more reason to visit forecourts



## Wash.ME

**Motor Fuel Group (MFG)** is working to install Wash.ME Revolution washers and driers at up to 300 sites across the UK over the next five years. This builds on rising interest in forecourt laundry services with round the clock facilities.



## Co-op

**Co-op** has partnered with Yeep to expand parcel locker services to 30 stores across the UK. The lockers are part of co-ops plan to develop added services and enhanced convenience.

Sources: wash.me and Co-Op

## More personal services are becoming more common too

The SPAR forecourt in Tootingham offers personal services to shoppers through a deli counter and a butchery.

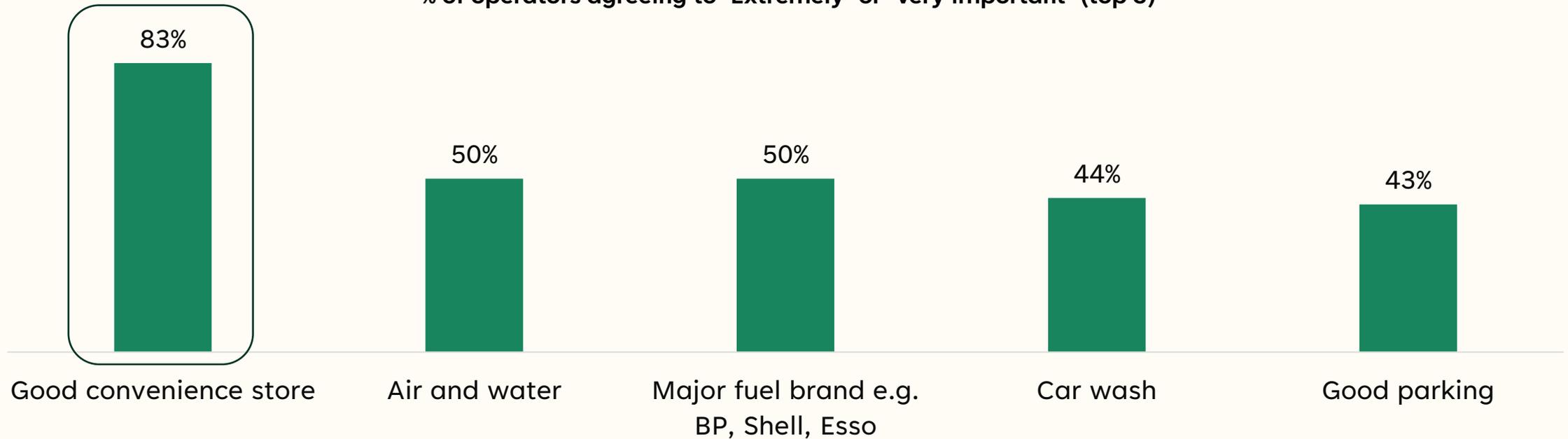
Making the forecourt a go-to for customers!



Source: Spar Forecourt - Tootingham

# There is no substitute for a good convenience store at a forecourt

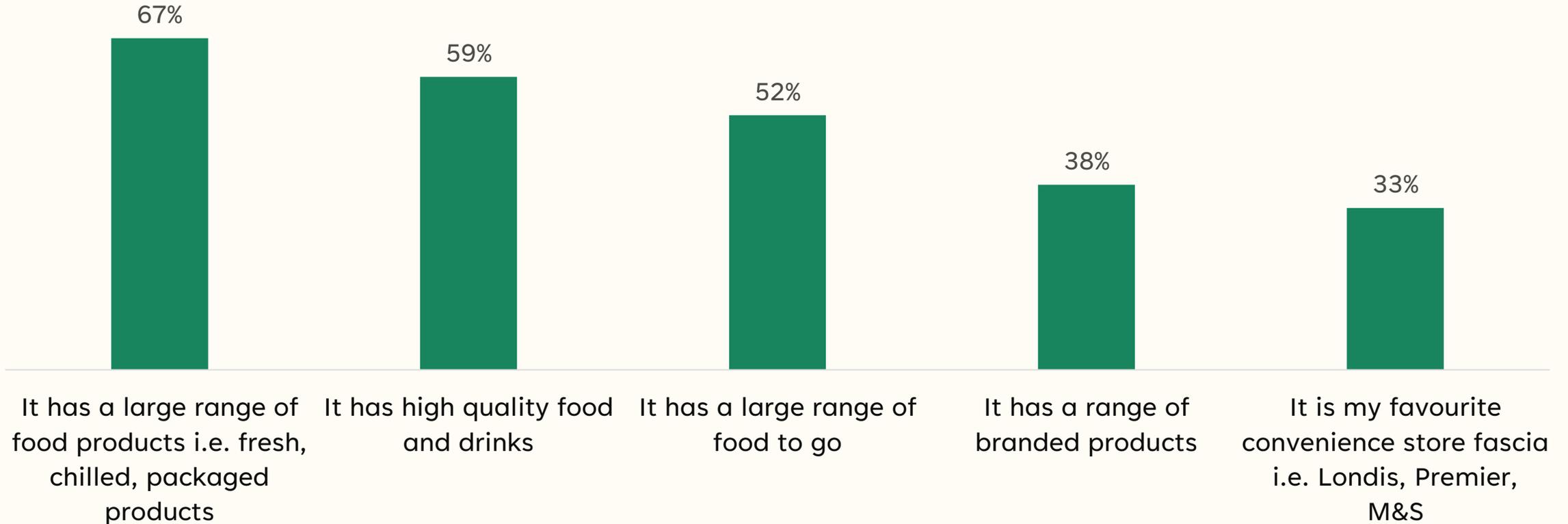
How important are the following services for your site at the moment?  
% of operators agreeing to 'Extremely' or 'very important' (top 5)



Source: Lumina Intelligence Forecourt Survey 2025

# Choice and quality are key markers of a good convenience store

What does a good convenience store mean to you? (Top 5)

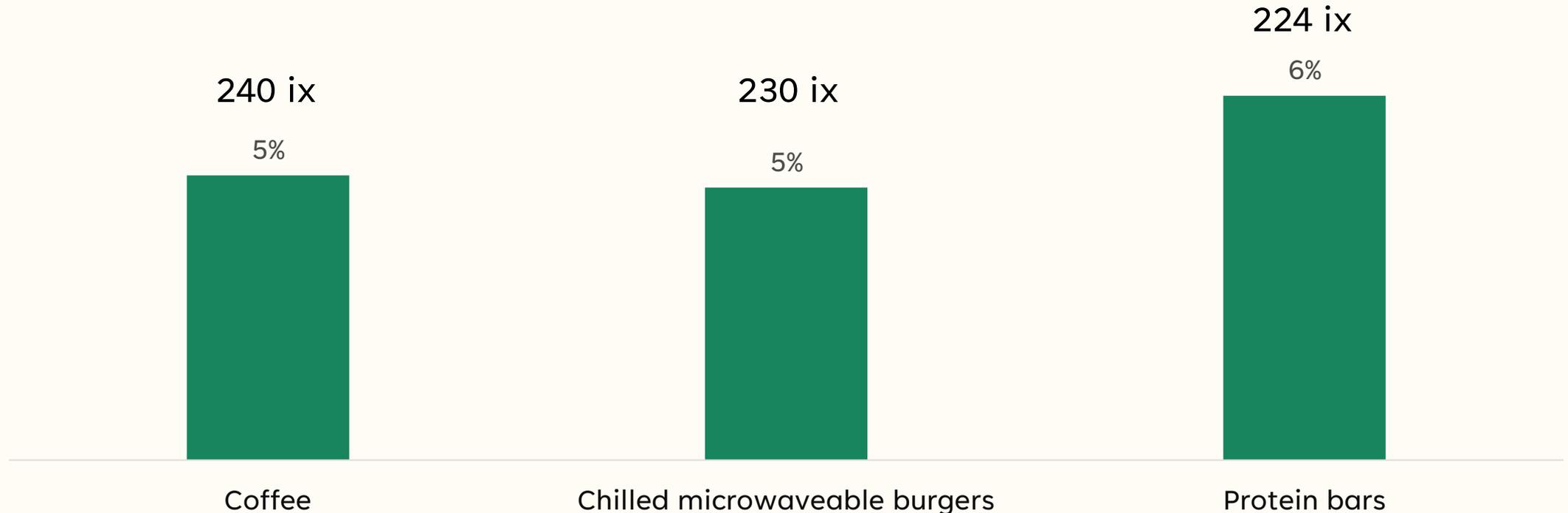


Source: Lumina Intelligence Forecourt Survey 2025

# Coffee, microwavable burgers and protein bars are crucial

Top sub-categories / more likely to feature in forecourt baskets

% of Forecourt baskets featuring sub-category and indexes vs Total Convenience

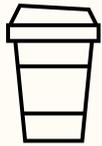


Source: Lumina Intelligence Convenience Tracking Programme – 52we data to 5 January 2025

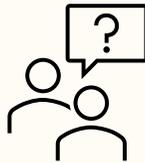
# Coffee and food to go will thrive further, but nearly ½ of operators believe food service will gather pace too



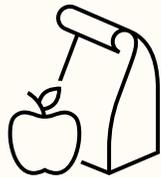
In the next 5 years, how important will the following services be for your forecourt shop? – extremely or very important



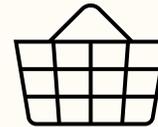
Hot  
coffee  
**58%**



Good  
customer  
service  
**58%**



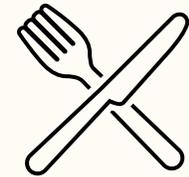
Food to  
go  
**56%**



Good  
convenience/ top  
up offer  
**51%**



Chilled  
Section  
**49%**



Food  
Service  
**47%**

Source: Lumina Intelligence Forecourt Survey 2025

# Customisation rises in food service



**Fireaway** has opened an express outlet in partnership with forecourt operator Highway Stops Retail. The concept is based on a 'subway style service' with consumers able to build their own pizza from a choice of 25 toppings which can be ready in as little as 180 seconds.



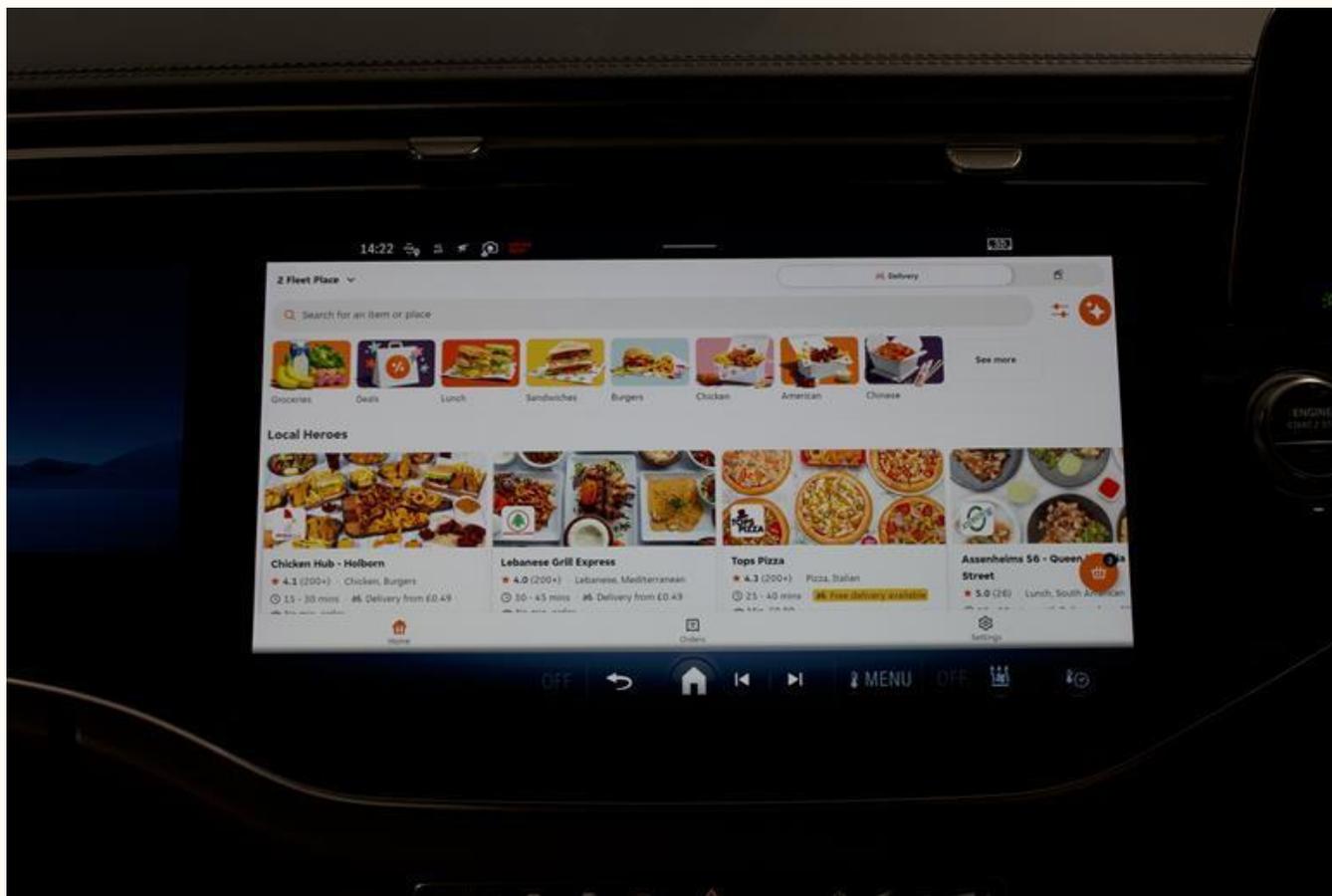
**BP's Wild Bean Café** is piloting made to order breakfast and lunches at some of its forecourts. Food is made in front of the customer with full customisation possible.

Source: ONS, London Evening Standard

# Just Eat rolls out in car ordering for EV charging

Just Eat rolled out an in-car ordering system which will allow consumers to order hot meals directly to their vehicle while it is charging.

The feature is expected to be especially popular in mainland Europe where longer, cross border journeys are more common.

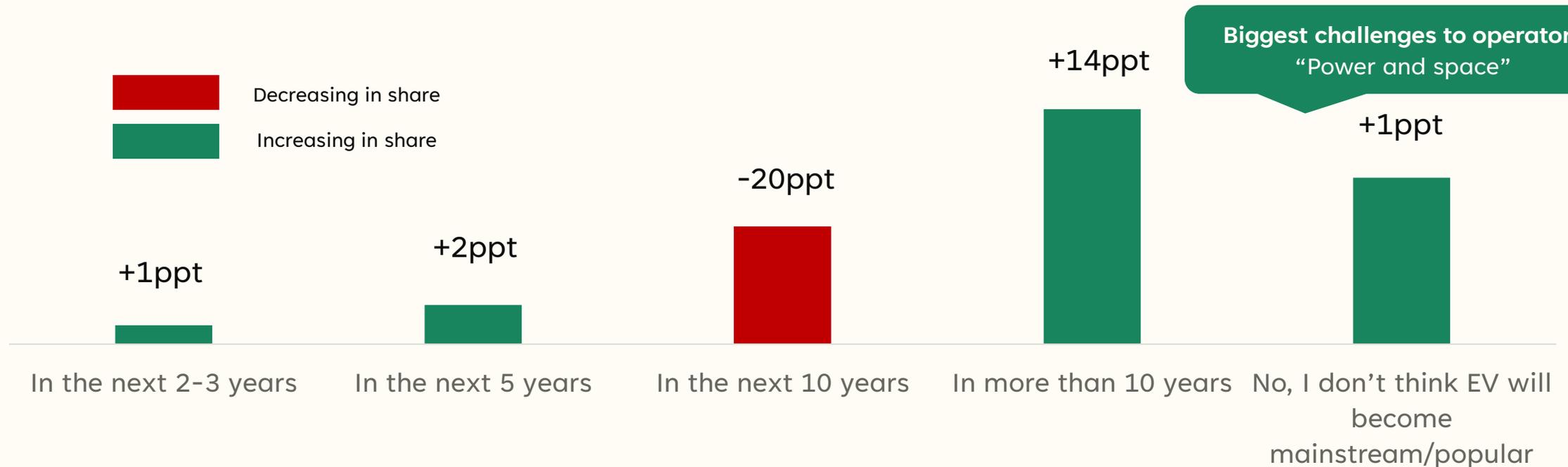


Source: Just Eat, The Grocer

# Scepticism about timeline of EV introduction grows however amid power and space challenges



In the future, do you think electric vehicles will become mainstream, and if so, when?



Source: Lumina Intelligence Forecourt Survey 2025

## New brands aim to assist with transitional issues



Fastned, a European ultra-rapid EV charging company, offers a "Clean Start" program providing up to £250,000 to help forecourt operators cover the costs of decommissioning fuel tanks and soil remediation.

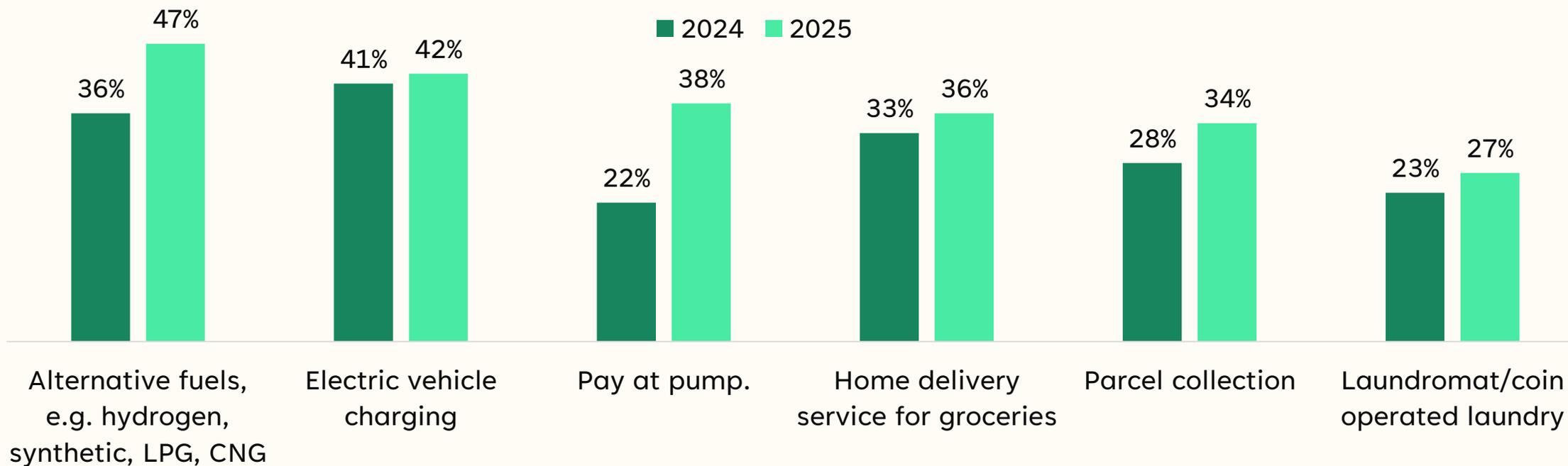


Source: Fastned

# Alternative fuels now rank as no.1 – now even higher than EV. Personal services too will grow



In the next 5 years, how important will the following services be for your site? % responding with 'extremely' or 'very important'



Source: Lumina Intelligence Forecourt Survey 2025

## Key take-outs



### Trading conditions

Frequency of trips and basket size increased as the festive period progressed, driven by alcohol featuring more in the final four weeks of the quarter. Shoppers opted to visit the shops more – aided by a warmer than usual December.

Source: Lumina Intelligence, February 2025



### Expansion of traditional services

No substitute for a good convenience store at a forecourt – hot coffee and food to go will continue to thrive.

Personal services are becoming more common – 1/3 of operators believe parcel services will be key in the next five years.



### EV and the future

Expectations for the timeline for EV to become mainstream has lengthened.

Operators now expect alternative fuels to be the no.1 service to develop in the next five years.

**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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