



Enhancing Your
Customers' Experience

EMERGING TRENDS IN FORECOURT RETAILING



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Service Stations of the Future

We've been researching and observing consumers' use of forecourts and service stations, particularly given the notable growth of electric vehicles in the UK and around the world. We're

The growing popularity of electric vehicles is reshaping the purpose of the traditional fuel filling station, as well as motorway service stations, opportunistically increasing customer dwell time within these locations as they charge their vehicles.

The purpose of this document is to example some of the notable trends both within the UK and around the world. Our global group has extensive involvement in the development of many of these trends, as consumer shopping and travel behavior continues to develop a growing appetite for an enhanced "experience" in every interaction:



The prime trend among charging facility providers in Australia sees charging stations set up in and around various retail outlets.

This sees companies such as **ChargeFox** and **Evie** installing rapid charging points in the immediate vicinity of complimentary retail and leisure spaces, in order to capitalize on existing footfall within these locations.

Here's where you'll find us:



Acknowledging the need to entertain customers as they charge their vehicles, providers such as ChargeFox and Evie set specific requirements as to the sites they wish to occupy. Considerations include the level of footfall, quantity and diversity of surrounding retail & operators, location and ease of access.



SHOPPING STRIPS



PETROL & CONVENIENCE



RETAIL DESTINATIONS



QUICK SERVICE RESTAURANTS

Australia

Retail and brands operating within the spaces that EV hubs are looking to occupy are becoming much more aware of the need to focus on enhancing their shoppers' experience to increase dwell time and ultimately, footfall.

This is particularly evident with initiatives such as the use of pop-up mobile constructions to promote particular product experience such as **Microsoft's Xbox** launch in Sydney.



Compression-wear brand **2XU** see the leisure side of their shopping experience as a fundamental route to repeat custom, encouraging their customers to sign up to their stores' running clubs upon completion of purchase.

Adelaide's Finest Supermarkets offer various in-store dining and tasting services, promoting premium product quality and an enhanced shopping experience.



The entire of the **Chadstone Shopping Centre** in Melbourne is built around keeping the shopper engaged for as long as possible. This includes the new hotel they have built to enable shoppers to stay over and shop for longer.

Australian brands and retailers such as **Aesop** have launched spa-inspired flagships, with tubs and running water, enabling customers to "try before they buy", enjoy a leisure experience as part of the shopping journey and increase dwell time.



United Kingdom

Our UK-team have a strong track record in assisting forecourt operators with new initiatives to engage with their customers and enhance their shopping experience.

The general trend in the UK has seen areas of larger fuel station stores repurposed to provide seating for customers, in conjunction with a café and food service offering.

Throughout our retail customer base, we are seeing an increasing number of initiatives aimed at promoting shopping as an experience. This is evidenced by **Marks & Spencer**, both within their traditional stores and their PFS-based stores



Other retail environments seeking to maximize dwell time include department stores. Working with **John Lewis**, we were extensively involved in the development, production and realization of a number of destination "hero" areas such as the Download Lounge, Men's style studio and the Beauty Society spa-styled area.

These particular store areas are designed specifically to generate greater levels of customer interaction and engagement, as well as increase dwell time and expenditure.

Garden centres such as the **Royal Horticultural Society** and **Haskins** rely on longer dwell times and repeat custom for business sustainability. In these environments, experience, entertainment and variety are considered of critical importance.

In addition to the fixtures within garden centres, we have been instrumental in the development and delivery of food service areas, farm shop areas, clothing areas and bookshop areas, all aimed at enhancing the customer shopping experience.



Austria

Since 2018, Wanzl have provided small format **Billa** stores within **Shell** petrol stations throughout Austria. These stores focus on staple food supplies and food for now, seeing Wanzl provide shelving systems, bakery equipment and display fixtures.



Responding specifically to ongoing trends around the growing use of electric vehicles in Austria, our local team have developed the **Wanzl-Box**. This is a mobile container, hosting a digital store or vending machine and is capable of operating personnel-free on a 24/7 basis.

Our local team in Austria have seen growing interest in this concept as a result of its flexibility of use. Importantly, the box concept can be applied in a multitude of locations from public spaces to service stations.



Wanzl supported the implementation of the **Kreisler** charging station, dedicated exclusively to electric vehicles.

This station enables users to charge their vehicles within 15-20 minutes, generating and providing electricity exclusively from solar sources.



In Italy, the vast majority of service stations neighbouring major artery routes and motorways are operated by **Autogrill**. Fuel filling operations are subcontracted, however Autogrill's focus is the retail offering within each station.



Autogrill has recognised the opportunity presented by electric vehicle charging stations and has already implemented initiatives to take advantage of additional customer dwell time.

Food service and retail areas represent Autogrill's core business, as such they continue to invest, particularly in motorway sites. They offer local regions food and gourmet specialties creating an inspiring environment and attractive areas for motorists.



Further measures and initiatives implemented by Autogrill to increase dwell time and cater for EV users include lounge-styled relaxation areas, based on a similar principle to those provided within airport environments.



Germany



Perhaps one of the most significant developments within the electric vehicle hub industry is the construction of the Sortimo Innovation Park on the A8 motorway near Augsburg, Bavaria, South Germany.

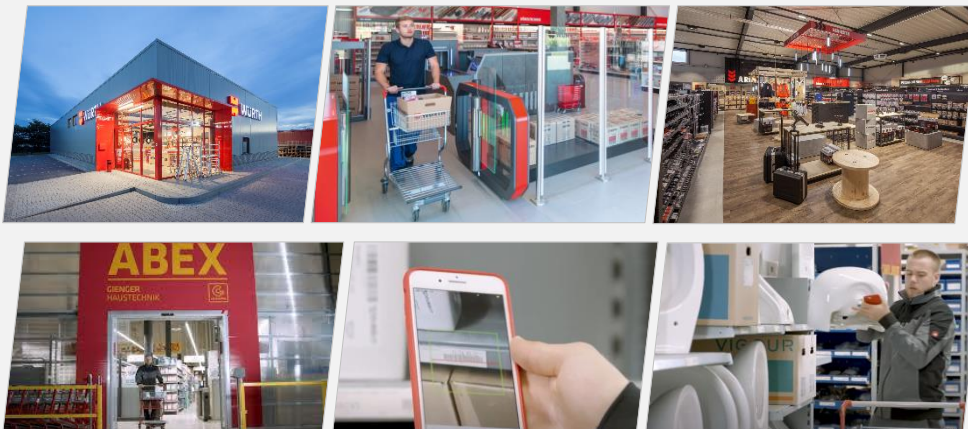
This vehicle charging hub will be the largest of its kind in Europe with 144 charge points – 120 X 50 kW DC points and 24 X 350 kW DC fast charging points.

Importantly, the Sortimo innovation park has been planned to provide rest areas, various shopping, leisure and entertainment facilities and also, hot-desking and workstation facilities.



Digital experiential retailing is already underway in Germany with the ultimate example of the **Tegut mobile store**. This is effectively a fully automated, personnel-free, prefabricated store which can simply be transported from location to location and placed in-situ for immediate use.

The store features app-based, controlled entry, self-scanning via smartphone and app-based payment. This solution offers an automated digital shopping experience which can be operated 24 hours a day, without the need for staffed cashier facilities or self checkouts, releasing further floor space for product merchandising.

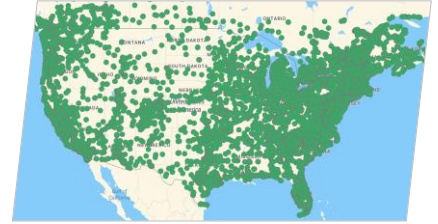


Working with both **Würth** and **ABEX** hardware wholesalers, Wanzl have developed a 24/7 hybrid digital store. The principle of this is to enable stores to trade traditionally during the day, as well as offering a digitally accessible in-store experience for instant fulfilment, outside of normal trading hours.

This principle can be applied to any retail or leisure environment operating on a 24 hour basis.



Responding to the growing use of EV's in the USA, the number of charging station installations is increasing quickly. In July 2020, there were over 26,000 stations (capacity for 84,000 EV plugs).



Whilst the majority of these charging stations are in built-up areas, neighbouring retail destinations for increased footfall, a growing number are being installed adjacent to freeways and interstate routes. A key focus for the majority of charger operators in the USA is to promote the use of DC fast charging, reducing the waiting time for motorists in line with traditional fuel types.

Many providers such as EVgo and ChargePoint are focusing on the delivery of fast charging points (bringing charge times down from hours to minutes), through dedicated stations in order to encourage EV drivers to charge their vehicles away from home and possibly, turn their stations into destinations.



Traditional fuel stations around the states have already begun looking to diversify their offerings away from fuel alone, in order to increase dwell times within their stations. Phillips 66 in Arkansas for instance, features a premium grocery store; White Oaks Station Local Market.





Our in-region team work closely with ABC service stations as a development and supply partner for service station interiors.

ABC focus heavily on their food service offering in order to increase dwell time for motorists looking to take a break and refuel / charge their vehicles, particularly within sites neighbouring national "artery routes".

Among other facilities, ABC stations offer food service areas, supermarkets, lounge areas and other recreational retail offerings.



Further measures and initiatives implemented by ABC to increase dwell time and cater for EV users include interior and exterior relaxation areas.

CONTACT US

To find out more, please get in touch...



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