

Lumina Intelligence

2026

Lumina Intelligence UK Forecourt Market Report

Brochure



About the report

The **Lumina Intelligence UK Forecourt Market Report 2026** provides a comprehensive overview of the **UK forecourt retail market**, analysing its key drivers and future growth opportunities. It offers detailed insight into the evolving role of forecourts as **multi-purpose retail destinations**, examining **leading and innovating operators**, supplier relationships, and consumer expectations.

The report features exclusive research from **Lumina Intelligence's bespoke consumer and operator surveys**, exploring shopper **missions**, distinctions between rural vs urban forecourts, **brand** and **quality** influences, and **food-to-go** demand.

With a section devoted to the **future outlook** of the forecourt market, it also addresses challenges such as the shift towards **convenience**, the need for **enhanced digital engagement** for efficiencies and battling crime, as well as a view on **delivery** from stations and how to **convert fuel shoppers to forecourt shop shoppers**.

The report empowers businesses with the knowledge to stay ahead in a **rapidly changing landscape**.



Sample Slides

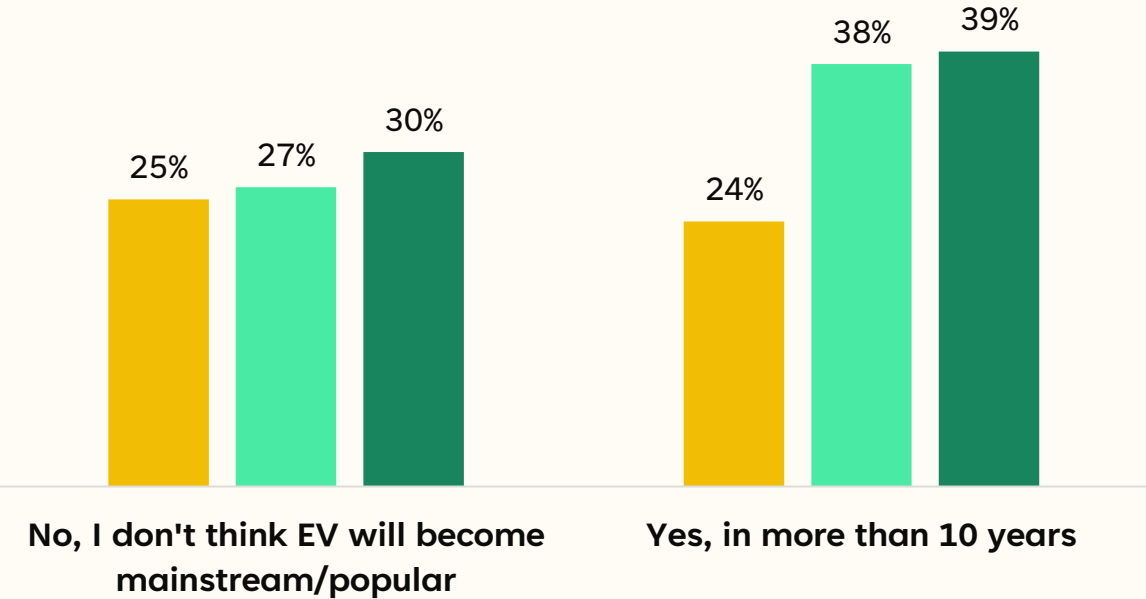


Scepticism about the timeline of EV becoming mainstream grows, amid concerns of ROI for operators

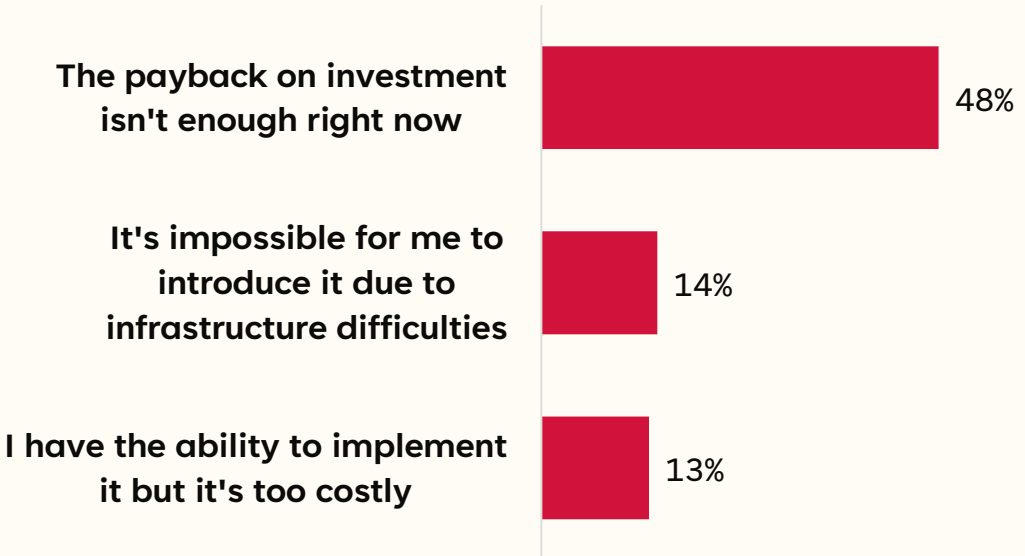


In the future, do you think electric vehicles will become mainstream, and if so, when?

2024 2025 2026



Which of the following best describes your ability to cope with the rise in EV?



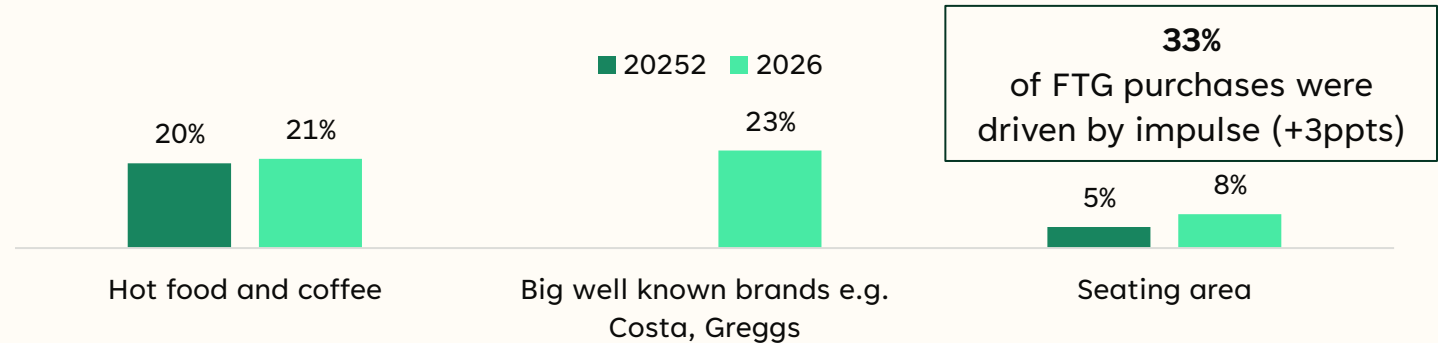
Source: Lumina Intelligence Forecourt Operator Survey 2026

Elevated FTG experiences are redefining forecourt visits, driven by hot food, coffee and brand familiarity



Food-to-go (FTG) is a critical driver of forecourt visitation. Shoppers are not only seeking hot food and quality coffee options but also gravitating towards the reassurance and consistency offered by well-known brands. The presence of a comfortable seating area further elevates the experience, allowing customers to consume their items on-site and extending dwell time.

What services would you like to see more of in forecourts?



ESSO The Oval services – Greggs and Subway concessions inside the Asda Express



Source: Lumina Intelligence Convenience Tracking Programme, 52WE 04.01.26 and Consumer Forecourt Survey, Co-Op (Cambridge North)

Well-executed displays and visibility at the point of decision play a crucial role in prompting spontaneous purchases, particularly during morning and lunchtime peaks.

What does this mean?

Valeting increases in importance

51% of drivers
now access
valet services in
forecourts – **up**
from 43% vs two
years ago

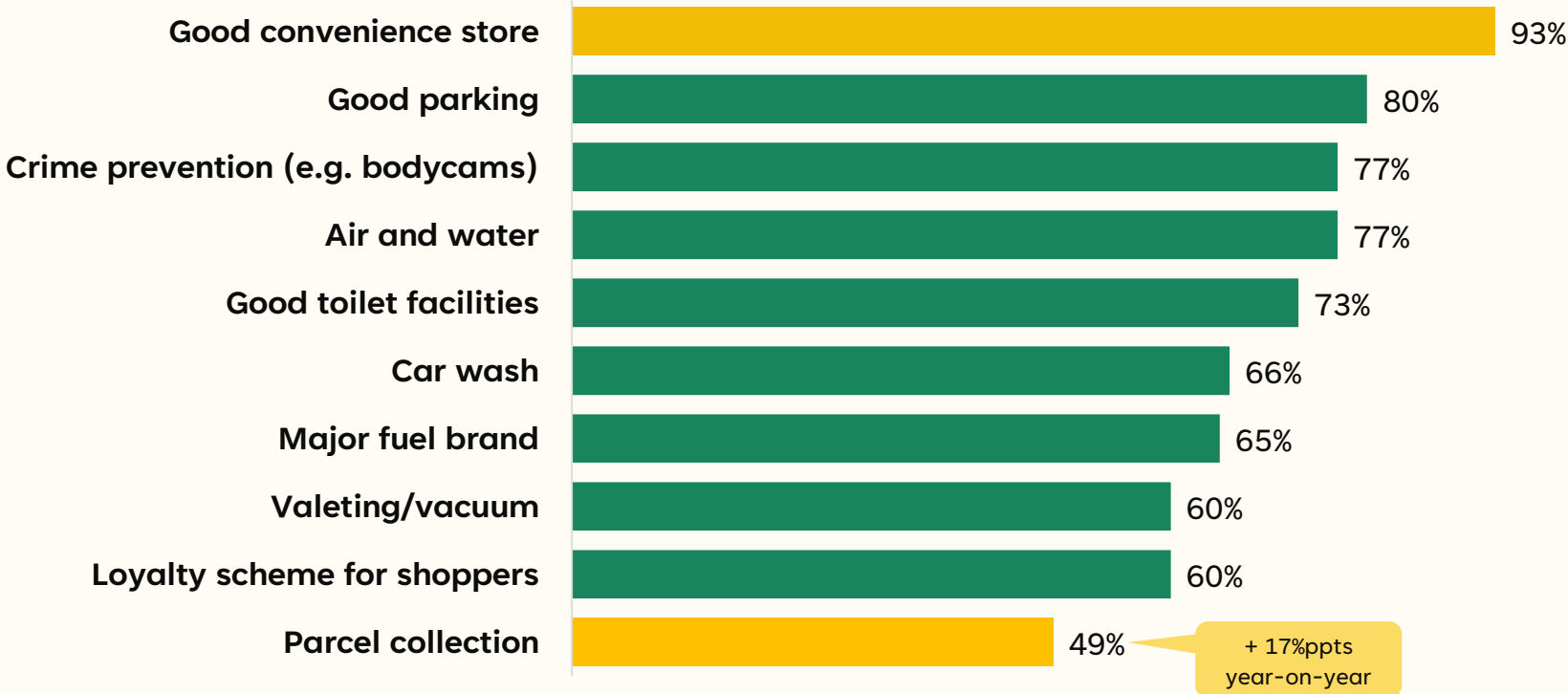


Source: Lumina Intelligence Forecourt Consumer Survey 2026

There's no substitute for a convenience store, but other services are motoring in popularity



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



Sources: Lumina Intelligence Forecourt Operator Survey 2026 and Eurospar (Hardford Link)

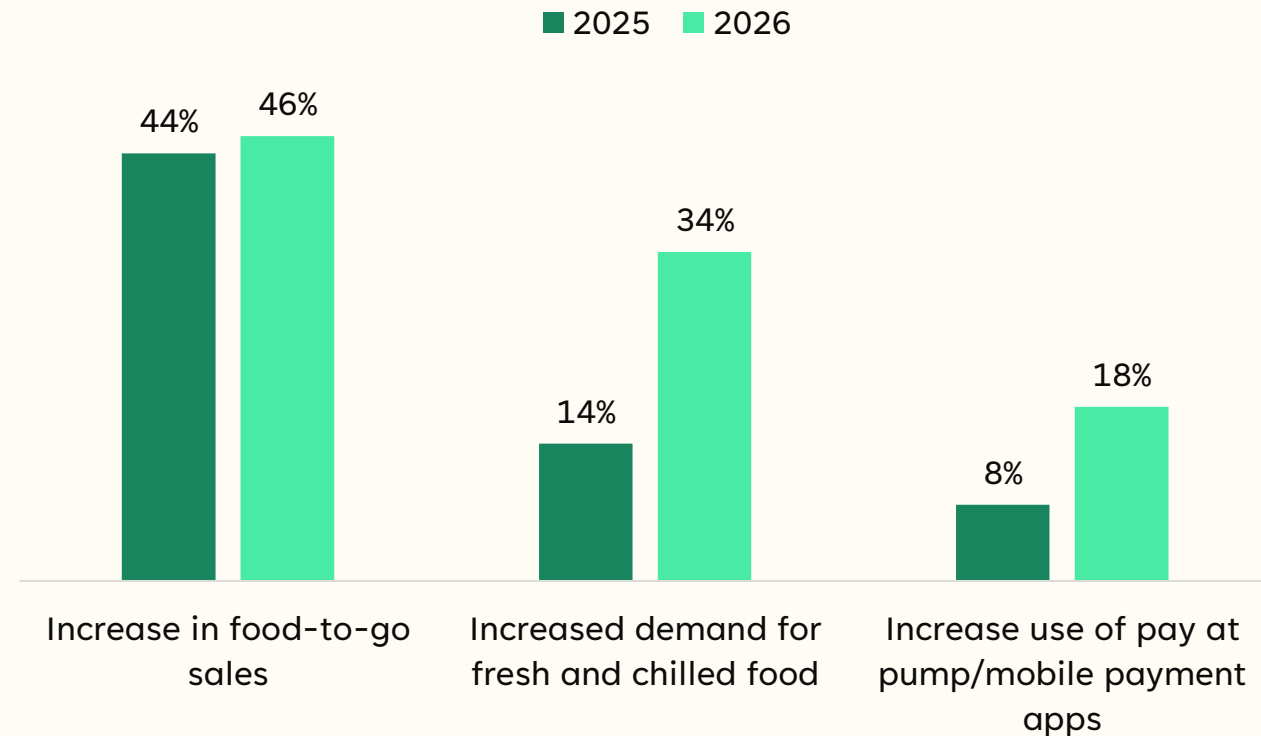


What are the biggest changes you have seen in your business in the last 12 months?

Food to go evolution and a focus on fresh and chilled – space permitting – will futureproof stores

The appetite for more fresh and chilled options has rocketed this year from consumers.

Demand too for Pay at Pump / Mobile App payments has more than doubled – operators must adapt to this through ensuring that offers in-store are very visible to drivers to convert them to purchases or embrace vending opportunities outside.



Source: Lumina Intelligence Forecourt Operator Survey, 2026

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Lay of the land and pricing & promotions

Analysis of forecourt shopper behaviour, and how it differs from that of the average convenience store customer

Insights into the key drivers attracting consumers to forecourts

Perspectives from forecourt operators on current challenges and opportunities

Expectations and strategic priorities among operators for the next 12 months

Shopper missions

Deep dives into the leading purposes for forecourt visits

Dissecting the thriving Food To Go mission, which commands dedicated space

Planned Top-Ups – impulse purchases are declining and shopper plan more, Lumina delves into the categories that forecourts need to stock

Meal for tonight – a busy working day or weekend treat, products that offer consumers speedy choice

Local distinctions

Look at a forecourt in a city centre vs a traditional rural location – what we observe in appearance and clientele can be very different.

Segmenting forecourts by ‘urban’, ‘semi-urban’ and rural, the section delves into the key differentiators and drivers according to location

Future outlook

Exploration of emerging trends shaping the forecourt and wider convenience market

Assessment of potential disruptions and growth opportunities

Strategic considerations for adapting to future consumer behaviour and market dynamics

Methodology



Convenience Tracking Programme

Lumina Intelligence's UK Convenience Tracking Programme (CTP) – survey based data collection with 1,500 responses weekly and 78,000 on an annual basis

Bespoke Consumer Data Collection

1000 car owners were surveyed in January 2026 with findings compared to January 2025 and January 2024 – responding on their needs within forecourt settings and their expectations for the future

Bespoke Operator Data Collection

100 leading forecourt operators were surveyed in January 2026 with findings compared to survey findings from January 2025 and January 2024 – responding on their sentiments on current trading and what the future will hold (e.g. EV)

Secondary External Sources

Lumina Intelligence also uses external sources including desk research and leading market websites

Source: Lumina Intelligence, March 2026

Report Details



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