

# PETROL VISION

The exciting  
future of the  
fuel station



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## The world is changing rapidly

Everyday we stand for new challenges; pandemic, climate change, urbanisation. One of the themes under constant change is mobility.

Today climate change is no longer a point of discussion but part of our daily reality. This has - obviously - a big influence on how we think about energy and therefor the petroindustry.

What the future will bring is uncertain. It was Shell who developed scenario-planning as tactic to be ready for the foreseeable but also unforeseeable future. Maybe the future will indeed be electric, maybe we will turn to hydrogen, but that we are facing change is a given.

In this white paper we will explore the themes that touch the future of fuel stations and how we see the road ahead.



**We are at the brink of  
change. We witness  
the biggest revolution  
in mobility since the  
production line of  
Henry Ford.**





# WHAT IF?

## **The foreseeable and unforeseeable future.**

If the COVID-pandemic showed us anything it is that the future is hard to predict. Although a pandemic is always somewhere in the worst case scenario reports - we didn't see it coming.

The mobility sector is developing in major speed, but nobody knows exactly where it is going. What about flying taxis, drone delivery and self driving cars? And why need a car when you are working from home?

Nobody knows what tomorrow will bring, but we do know what are the driving forces in our society. **These driving forces will give us a clue in what direction we are going.**





# SEPARATION OF FORECOURT AND SHOP

We see different kind of fuel stations. Highway or not, with or without shop. We see that the big petrocompanies are experimenting challenges towards the future. And much is uncertain but we believe that the shop still has enormous potential. Where in the past the forecourt was dominant, now-a-days there are more and more locations where the shop is even more profitable then the forecourt.

So, let that be our message to the sector: there is so much more potential in the shop then we see at the moment. Especially in the fresh offer. The absolute goal for the fuel station of the future: be independent from fuel, independent from tobacco. No low margin, but high profit products. And that can only be realised by clear focus and smart fresh.

Fuel stations are rethinking their role in the changing world. **What is the next step? We believe there will be a shift in importance from the forecourt to the shop.**



**From fuelling your car  
to fuelling yourself!**



## CLIMATE CONCIOUS



## HEALTHY LIVING



## AUTHENTICITY





**TIME  
PREASSURED**



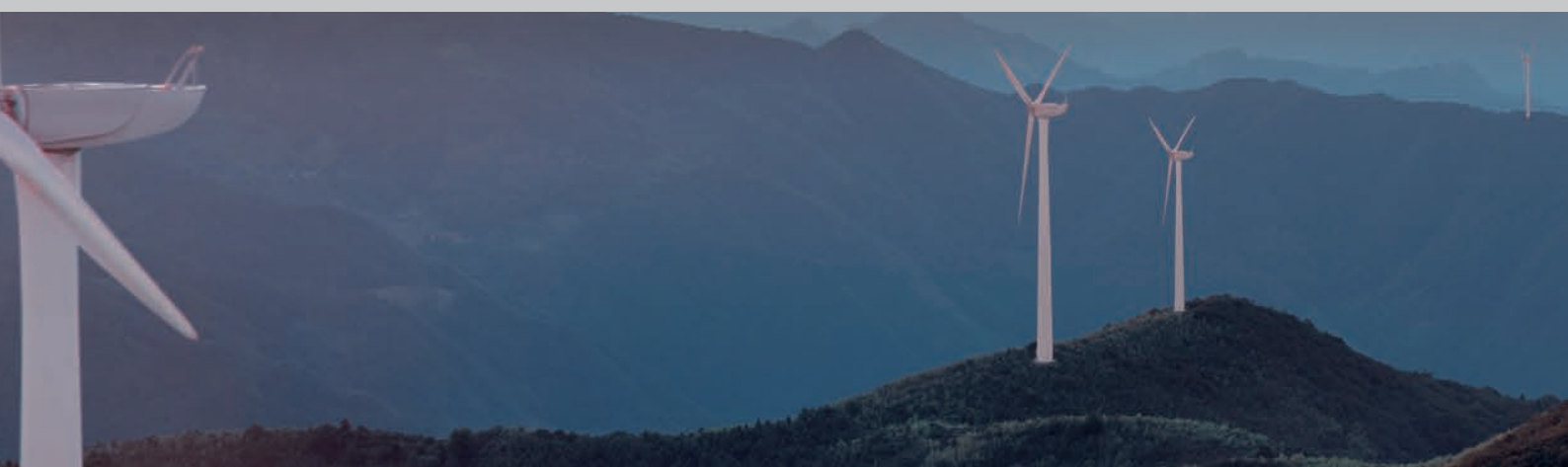
**DIGITAL  
ERA**



**DIVERSITY**



**FUTURE  
DESIGN**



Only electric cars  
for Volvo from 2030.  
The forecast say that  
by 2040 virtually  
every new car will  
be electric.



# CLIMATE CONCIOUS

It is clear that sustainability thinking and the energy transition has had major consequences for the fuel station.

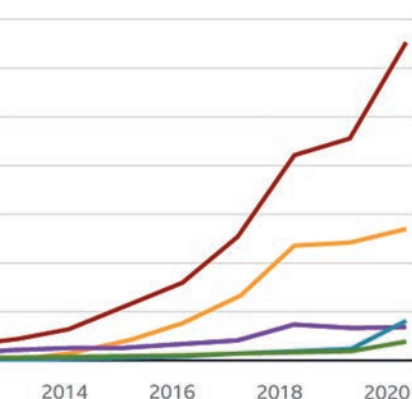
By 2025 20% of all new cars sold globally will be electric, according to the latest forecast by the investment bank UBS. That will leap to 40% by 2030, and by 2040 virtually every new car sold globally will be electric, says UBS. And how many cars will be sold anyway if we start sharing instead of owning?

This new way of fueling changes the whole infrastructure that we built up during the last century. **So fuel stations need to find a way to satisfy the new needs of the green driver.**



electric cars accelerate

China — Germany — US — UK





**NATURAL ATMOSPHERE**



**NATURAL RESOURCES**



**MULTIMOBILITY**



**SHARING INSTEAD**



# GREEN INSPIRATION



ZERO WASTE



ROAD OF OWNING



ENVIRONMENT







# HEALTHY LIVING

**The COVID-pandemic accelerated the healthy living trend. Healthy living means more exercise and better food.**

Traditionally not what the fuel station was associated with. But that is going to change. Of course in the foreseeable future the guilty pleasures and mars bars will still be found, but a new healthy tasty and fresh assortment is added to the range of the future fuel station. Also, when we go from oil and petrol to electric charging to whole atmosphere of the fuel station can change towards a pleasant and green stop-over.





**TAKE QUALITY TIME**



**AUTO**



**FAST AND FRESH**



**NATURAL PLAYGROUNDS**

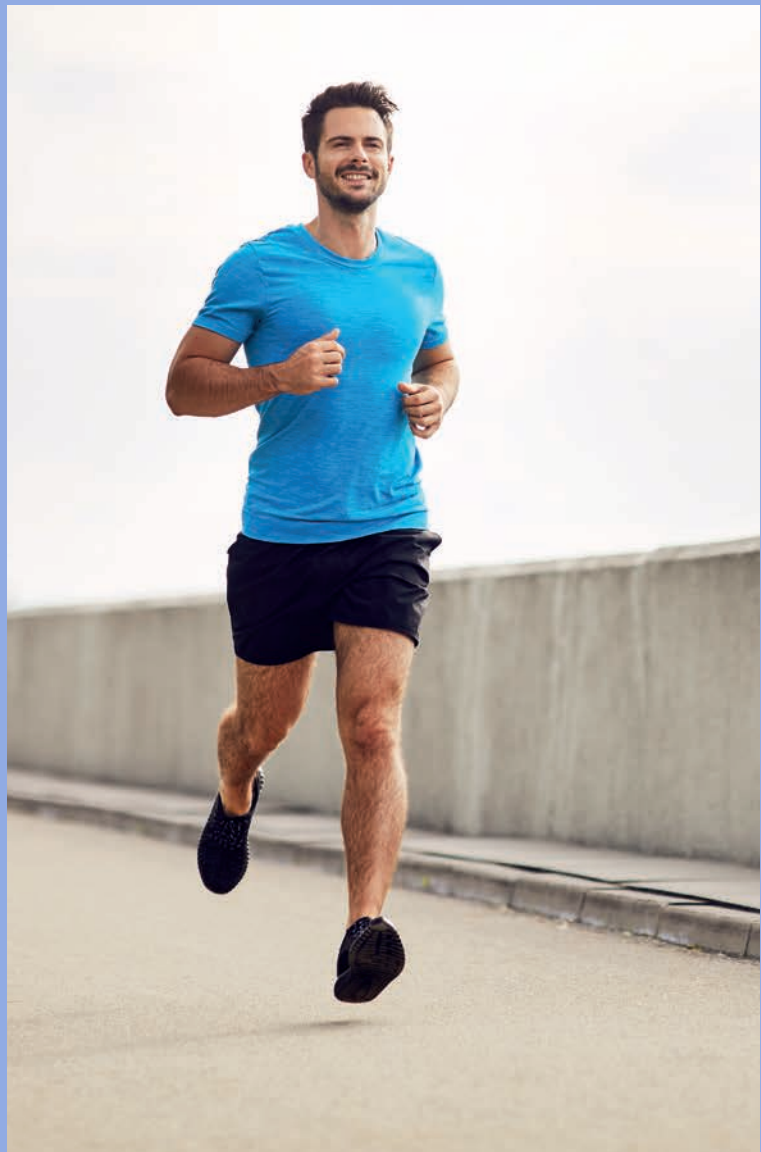




# HEALTHY INSPIRATION



DOMATED FRESHNESS

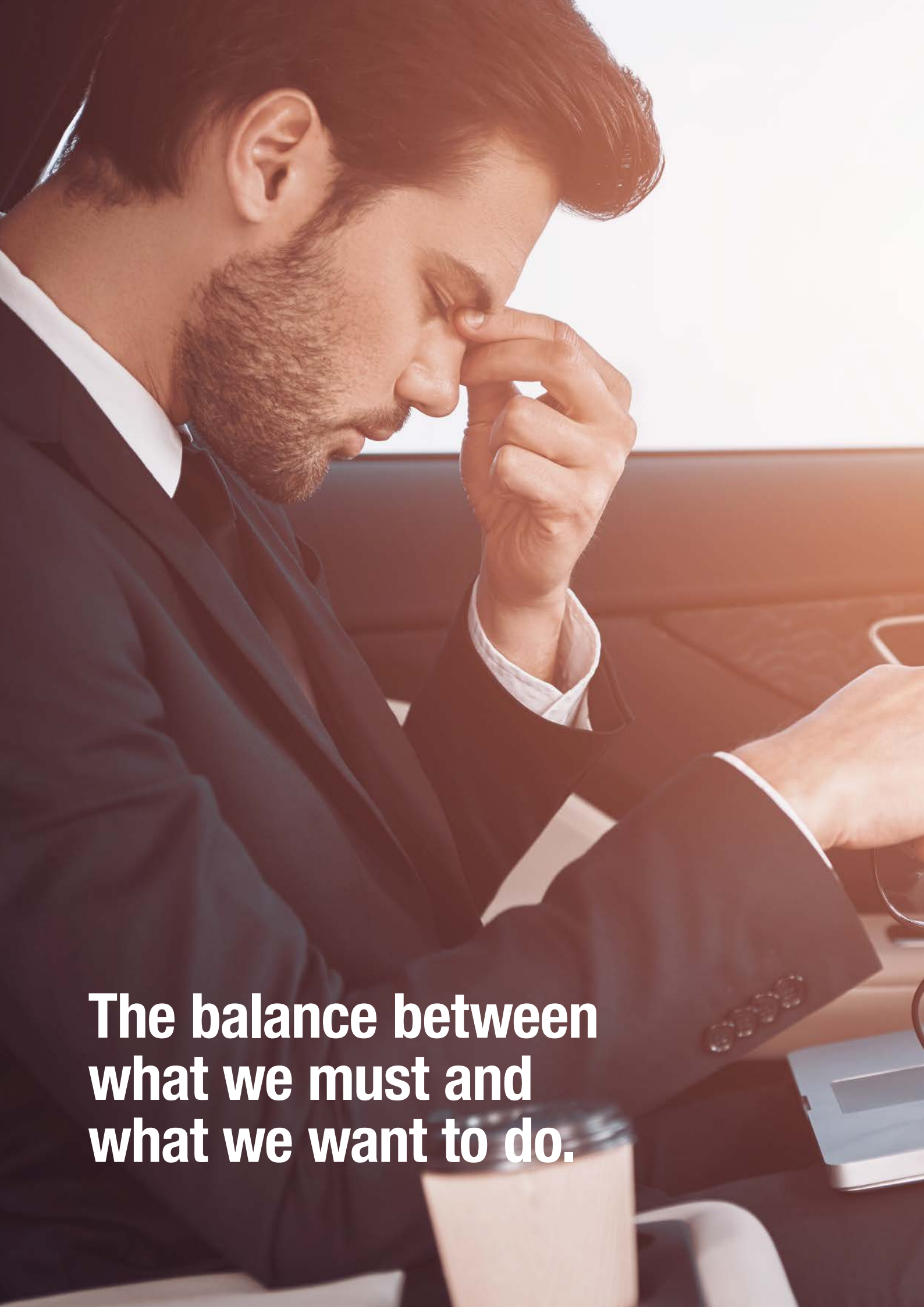


BODY BALANCE



DIY





**The balance between  
what we must and  
what we want to do.**



# TIME PREASSURED

People are getting busier than ever, two working parents, high demanding jobs, urbanization, it all drives the need for convenience.

**Food service is growing.** People are willing to spend more money on food on the go and other convenience solutions. And what better location than the fuel station? These locations are easy accessible, on the way to work, or close to where people live. And then not a small version compressed version of the local supermarket but real quality fresh food.

The current shop is often driven by speed and convenience. 'I need to eat something, or I need to find a small gift to bring to the party tonight'. **The future shop is driven by surprise and experience.** From need to want. 'I want to eat something, because I love the sandwiches.' 'I want to browse for some gifts'.





**COOK, WORK AND COMFORT**



**GROCERY WO**



**FAMILY MANAGEMENT**



**NO TIME TO EAT**



# CONVENIENCE INSPIRATION



**WORK BREAK**



**INCREASING TRAVEL TIME**



**MOVE AND RELAX**







# DIGITAL ERA

**The digitalisation brings us challenges, but also a lot of opportunities.** The smart phone is our compass and technology makes it possible to be connected anytime to anywhere.

Technology helps us:

- To create a easy and fast experience
- To publish a message and share information
- To improve operations and change business models
- To create interactive engagment and community

Functional technology is a big part of our life and of retail. **The big challenge for the coming years is to use digital also in a way to add value and emotion.**

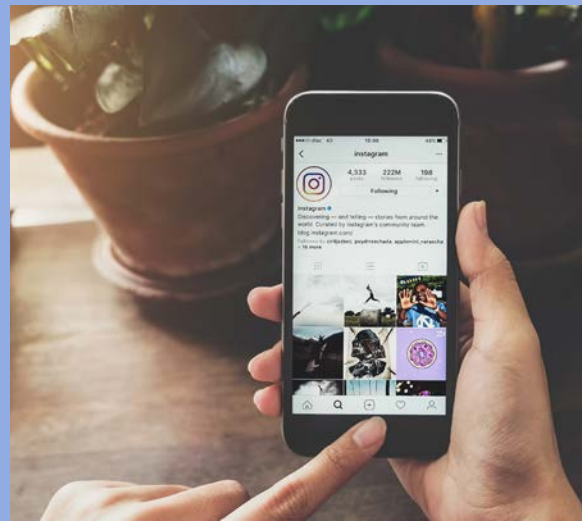




**VIRTUAL ACTIVATION**



**AUTOMATED TECHNOLOGY**

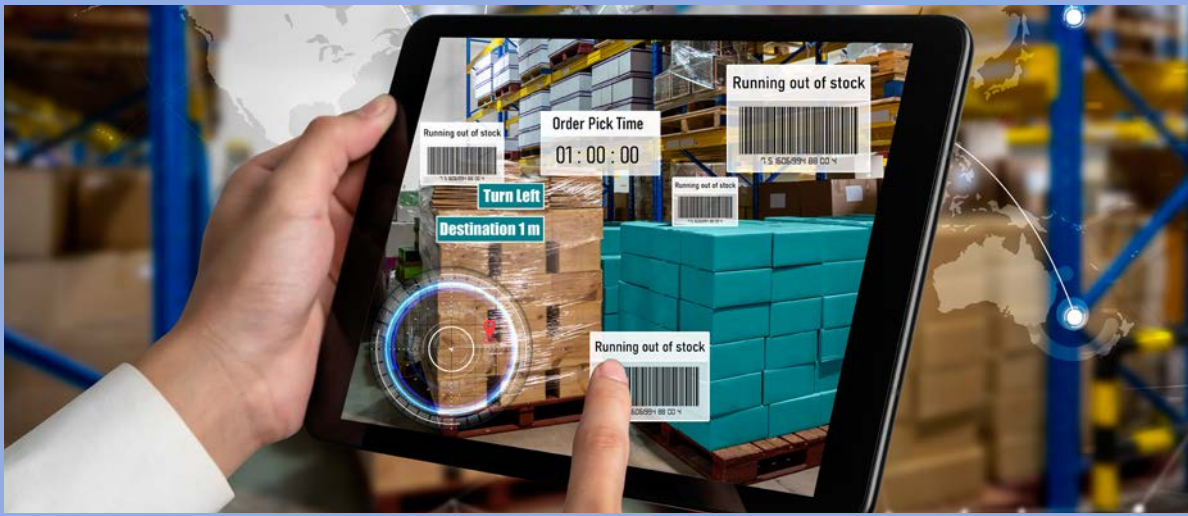


**OUR PERSONAL DEVICES**





# CONVENIENCE INSPIRATION



## Y VIRTUAL SHOPPING



## ENDLESS TECHNOLOGY



A glass of orange juice with ice and a cinnamon stick, surrounded by cinnamon sticks, star anise, and an orange slice. The background features a woven basket filled with oranges and a green leaf.

**MASS-SCALE  
IS SUSPICIOUS**



# AUTHENTICITY

**Mass-scale is suspicious.** Especially the big fuel brands are not that popular at the moment.

How do we create a brand that is closer to the people and feels safe and trustworthy? That's what we call small at the front, big at the back.

You can still profit from all the advantages of being a big company but still communicate in a small way. **More attention to local difference, great staff and local involvement create a likeable brand.**





**REAL EXPERIENCES**



**PURE A**



**REAL MATERIALS**



**IN CONTACT WITH N**



# AUTHENTIC INSPIRATION



AND NATURAL



NON PROCESSED FOOD



NATURE



FAIR TRADE, BEST TRADE



A man with a beard, wearing a dark suit, white shirt, and black tie, is seated at a wooden table. He is looking towards the right. Next to him, a woman with long, wavy red hair is partially visible, looking down. On the table in front of them is a large bowl of fresh salad with green lettuce, purple leaves, and tomatoes. A white coffee cup with a green handle sits on a saucer. The background shows a blurred office or cafe setting with a window displaying some text.

**A company and a  
station that represents  
society in all its  
diversity.**



# DIVERSITY

**The future fuel station is more feminine and diverse.** Society is changing and so is the target group for fuel stations.

The target group is more diverse as more and more people enter the job market. Women, people from all different backgrounds, different ages. And all these people travel more and more for work and want to see themselves represented in the communication of fuel stations and shops.





**WORK IS LIKE A SOCIAL EVENT**



**SAME ROLES**



**BLENDED FAMILIES**



**NO TIME TO EAT**





# COMMUNICATION INSPIRATION



FOR ALL

REALITIES AND TECHNOLOGIES



CULTURAL BLEND







# FUTURE DESIGN

**The future is exciting.** And from a sector that is looking so much into the future you expect that to be represented in the design. When it comes to giving sustainability an extra boost in using recycleable materials but also the whole atmosphere around the fuel station.

The ambition of the fuel station should also be represented in the assortment. Fresh, tasty, transparent and healthy. When all this comes together and it is authentic and believable the fuel station of the future arises. **A place to fuel yourself.**





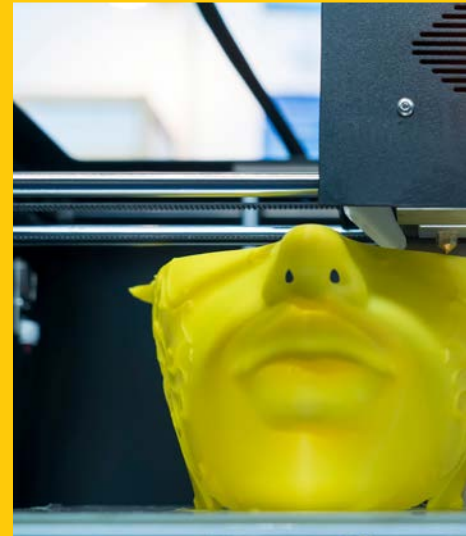
**ORGANIC ARCHITECTURE**



**FRESH**



**CONVENIENT DESIGN**



**3D PRINTING**



# FUTURE INSPIRATION



**WORK AT THE SOURCE**



**FLEXIBLE POWER**



**HANDS FREE DRIVING**







# LOCATION-BASED CONCEPTING

**Every location has its own characteristics and context.** How do people use this specific station? What is available in the surrounding? In general, there are some distinctions to make a segmentation. Rural or urban for example, but the main difference can be made between highway and non-highway.

## **Highway**

At the moment the highway shops are still very functional and interchangeable. People stop often driven by routine, they always stop there, it is on route and they need to get a quick bite or drink. We expect this to change. The future shop will be less 'must' and more 'want'. Different shops will compete with each other with their fresh food offer. A distinctive fresh food offer will therefore become more and more important to be relevant for your customer. They do not longer accept a functional assortment for high prices, they are going to expect a surprising fresh food offer.

## **Non highway**

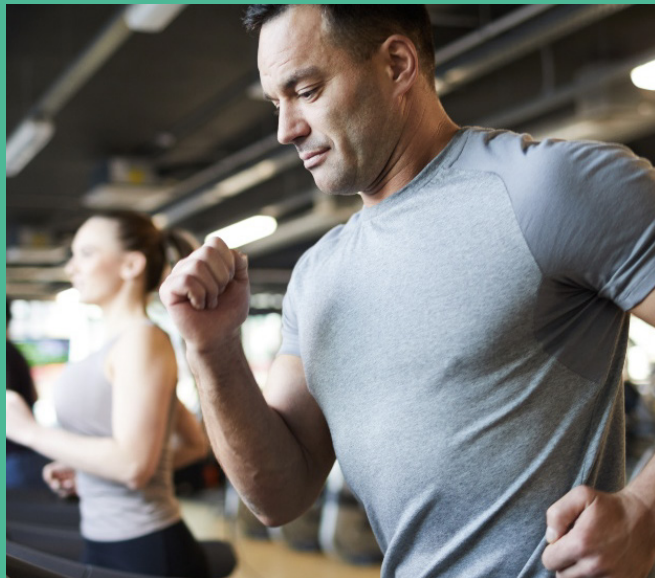
For the non-highway routine is also very important, but combined with proximity. The non-highway shop is very much influenced by the surroundings. What kind of food service or other competing concepts are available in the proximity? The future shop is based on the need of the customer in the area. Differentiating from the other food to go providers in the area providing the next level of (qualitative) convenience. But maybe going even further and providing services like the post office for the neighbourhood.







# MOODBOARD





**FUELING**

FULLY  
AUTOMATED

**PRACTICAL RELIEF**



MANAGE  
DELIVERIES  
FOR DAILY LIFE



NO NEED  
TO GET OUT

**MEAL PICK-UP**

**HIGH CONVENIENCE**

**DESTRESS**



STUCK IN TRAFFIC  
LIMITED TIME



ALL AT  
ONCE

**PICK YOUR LANE**

**1**

**FAST LANE**

**2**

# DESTINATION OPTIONS

## EAT & MEET



## STRETCH & REFRESH

QUICK  
EXERCISE



## RECHARGE

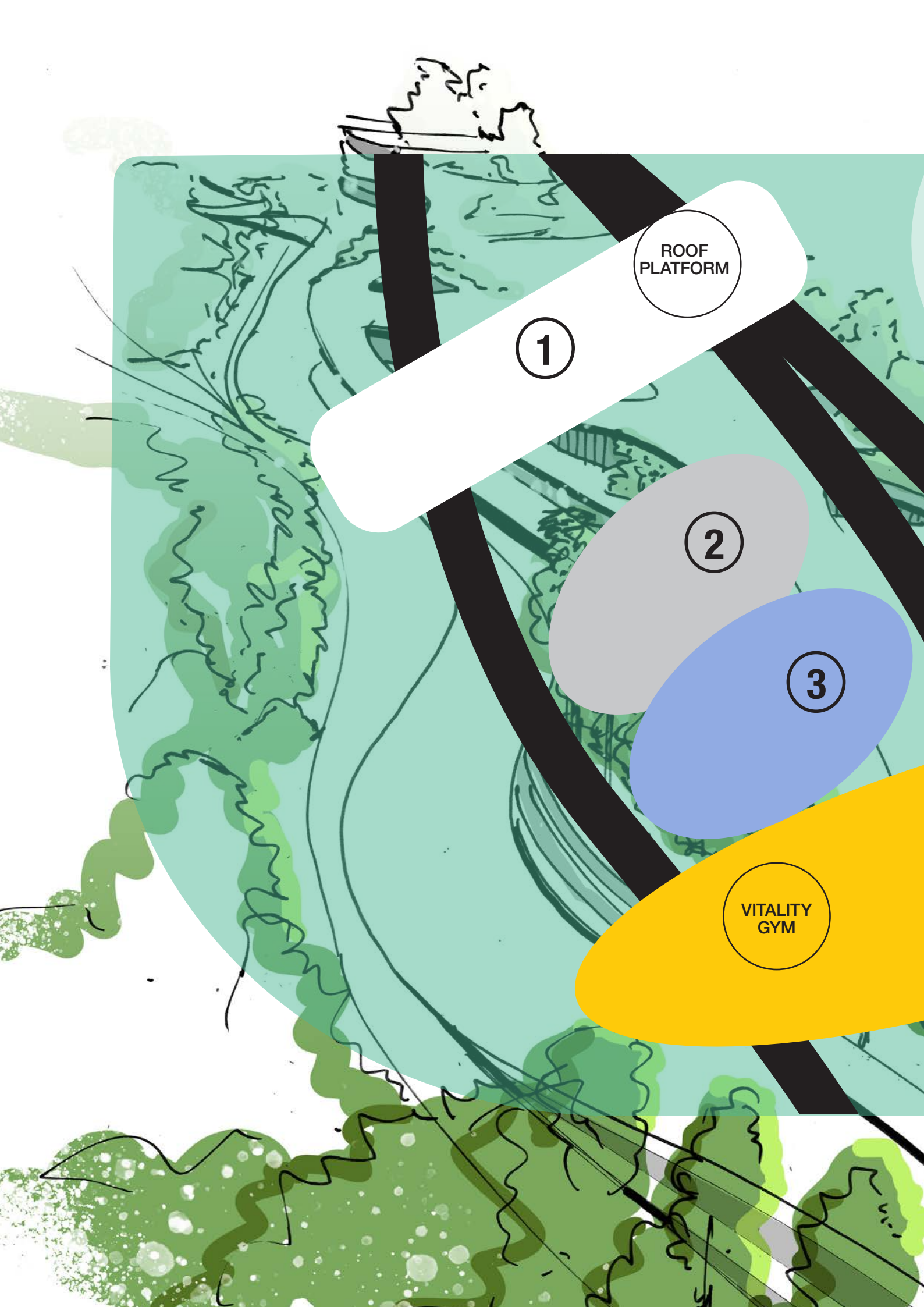


WELCOME BREAK ON  
A LONG WAY TRIP

## FAMILY PICKNICK

2 QUICK LANE

3 SLOW LANE



ROOF  
PLATFORM

1

2

3

VITALITY  
GYM

# FACILITIES

5

1 FUEL

2 CAFÉ

3 SHOP

4 PANORAMIC  
FOODCOURT

4

5 PARK



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