

ASDA On the Move

The Big Retail Tour

ASDA On the Move

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GROWORX
Digital



The Big Retail Tour

ASDA On the Move

I was really looking forward to this retail tour as it's a fascinating, rapidly changing & growing sector.

The first 'Asda On the Move' convenience store has opened on a Euro Garage's site in Walsall.

The site is part of a three-store trial with EG Group that will see Asda opening on forecourts in the Midlands during November & December.



The Big Retail Tour

ASDA On the Move

Before we take a look at this new store format, let's have a look at some forecourt retail insights:

- Total UK forecourt sites
- UK forecourt format sizes
- Average basket size & spend
- Top " selling products
- % of digital screens installed
- % have digital shelf edge labels



Forecourt retailing insights



8,382

Fuel forecourt sites in
the UK

7,402

Forecourt sites have
shops

Forecourt retailing insights

76%

1-999 sq.ft.

18%

1,000 - 1,999 sq.ft.

7%

2,000 sq.ft. & above

Forecourt retailing insights

Average
basket size

2.34

Items

Average
Spend

£6.06

Excluding Fuel

Forecourt retailing insights

1. Tobacco

2. Soft Drinks

3. Convenience & Deli

Forecourt retailing insights

Only
47%

forecourt sites in the
UK have digital screens



Forecourt retailing insights

Only
24%

forecourt sites have
digital shelf edge labels

Forecourt retailing insights

Only
12%

forecourt sites have
in-store wi-fi

Forecourt retailing insights

Only
35%

forecourt retailers have
mobile marketing
platforms & loyalty
schemes

Forecourt retailing insights

Customer spend at forecourts will continue to shift from fuel purchase to convenience retailing

Adjacent value added and entertainment services will gain centre stage

Forecourt footprint could witness a potential fall in some markets, while in others they will have to be repurposed

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Now we've looked at the insights, let's look at the new 'ASDA On the Move' store format in more detail. This was going to be a fascinating visit to a great new store format.

Fresh Flowers



Food to Go

Food for Later

Fresh Flowers

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As soon as you enter, you can see their new 'Food to Go' & 'Food for Later' products. Perfectly placed and ideally located for a 'grab & go' purchase.



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The Starbucks coffee area is within the first few steps as you enter. Again, perfectly placed to grab a coffee before you pay for your fuel.

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The Starbucks coffee area perfectly positioned, great design, bright white lettering really stands out, catching attention as soon as you enter.

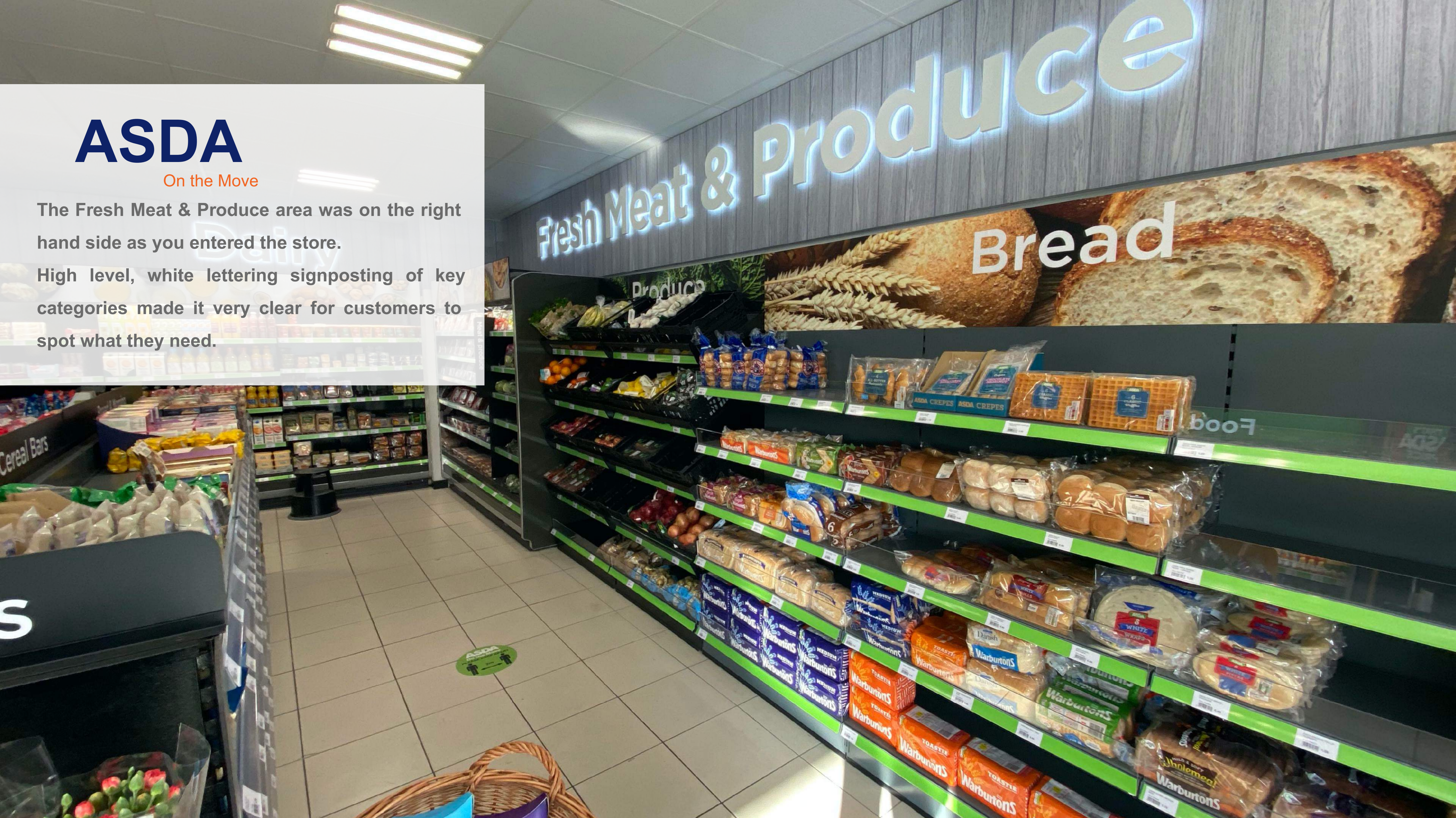


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The Fresh Meat & Produce area was on the right hand side as you entered the store.

High level, white lettering signposting of key categories made it very clear for customers to spot what they need.





Food to Go

Food for Later

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Loved the simplicity of this area, clearly signposted & segmented. This is how you do it..... savoury products as soon as you walk in!



Food to Go

Food for Later

Protein

Cereal Bars

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Low level displays allows for customers to have a clear view of the whole store. Clean white lettering on backgrounds create real standout.

Chilled Drinks

Dairy

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On the Move

LED haloed white category signage at the top on grey wood walls, digitally printed product shots underneath, not too big but enough to showcase the category.



Dairy

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On the Move

The bright under top shelf lighting really illuminated the products perfectly.

Bright, clean & engaging to customers.

Frozen Foods

Chilled Drinks

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On the Move

This looked absolutely lovely, well designed & well stocked but lacked any real standout.

Could have done with a few, strategically placed shelf frames of dividers to create some sort of small differentiation of brands or products.

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The frozen foods area was incredibly engaging, each freezer unit was extremely well lit, really showcasing the products inside.

Frozen Foods

Vegetarian & Vegan



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Low level signage on the freezer unit panels were really clear, simple, effective and enabled the customer to make an instant product selection.

Ready Meals

Vegetarian & Vegan



Frozen Foods

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I liked the open, free-flowing feel of this section, aisles wide enough to feel spacious without feeling empty, clinical & cold.

Chips



lott



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On the Move

Great little 'GadJet' display right at the till
points, well stocked, great products and
perfect for the impulse tech buy!



Pet Food

Rice & Pasta

Frozen

Baby Food

Household

Chilled

Canned Vegetables

Soft Drinks

Dairy

Car Care

Magazines

Condiments

Cordials

Cereals

Food for

ASDA

On the Move

The in-aisle high level category flags had real standout. Simple white font on dark grey background enables customers to immediately spot the category they are looking for.

CAUTION

WET FLOOR



Canned
Vegetables

Soft Drinks

Chilled Drinks

Condiments

Cordials

Dairy

Fresh Meat

Food for Later

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Simply constructed on a grey metal arm which connected to the middle of the metal shelves.

Elegant, extremely well designed solution!



Canned Vegetables

Soft Drinks

Condiments

Cordials

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As a signage geek, I had to get a close up of the signs as they looked incredibly simple but really effective.

Food

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The tills points were really clear, clean & easy to access, some forecourt stores are cluttered and difficult to navigate. Plus the staff were lovely, big thank you to the store manager who let me take all of these images!



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The customer journey from 'door to till point' can sometimes be an absolute nightmare in small format forecourt retail stores. This was really well designed, it felt open, wide and had simple social distancing messaging.





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I'm not a person who vapes but this unit was really well designed & stocked, with products split across three sections.



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On the Move

This product display was similar to the chilled drinks unit in design, just a mass of product. Could have done with a few, strategically placed shelf frames or dividers to create some sort of differentiation.

Not to spoil the overall design but something subtle needed to enhance this display.

“

“The road ahead looks exciting for forecourt retailing with some key trends re-shaping the sector. There is no doubt that the store I visited is the format of the future for all ASDA forecourt stores, I believe it’s a real game changer and competitors will have to play catch up and quickly.

Forecourt stores have an important part to play, as throughout the pandemic as they have been used as a ‘local convenience store’ for people unable to travel far from home with all the pandemic restrictions. There are over #,\$\$" fuel forecourt in the UK with over %,\$\$& of them having stores, these are perfectly located within the community with ample parking.....the ‘ultimate convenience store’ moving forward.

There is no doubt that shoppers who visit forecourt stores have changed their shopping habits and this will only act as an accelerant to future change in formats, product & service offerings.

As the product mix moves from away from fuel, which is +’\$% of revenue today to increased sales of food & beverages plus more adjacent services like collection lockers, pick-up, drop-off points and parcel delivery services. We will see new formats including more fast-food outlets, cafes, grocery, alcohol and ‘food for now’ & food for tonight’ option I saw in the ‘ASDA On the Move’ store.

The impending governmental drive towards electric vehicles will also further decrease the dependance of fuel sales for the sector but I think the sector has time to respond. There are new retail, location, infrastructure, operational & strategic considerations to be made but for me forecourt retailing is the ‘ultimate convenience store’ of the future.”

Thoughts on the new format



Steve Lister

GROWORX
Digital

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“This forecourt concept appears to be part of the new association between Asda and their new owners, the brothers that run EG. It's a very contemporary design, with several elements from the supermarket formats.

Coffee is a key destination category in forecourts, so it's interesting to see this right in front of the entrance. Retailers usually place destinations at the rear, so shoppers walk past lots of exciting impulse items as they seek it. I wonder if they might have capitalised on the wait for coffee dispensing to interest the buyer with secondary purchases. Calls to Action around snacks and confectionery at the coffee point might prompt additional buying.

I am intrigued to see the flowers so prominent at the entrance of the store, is there any data to suggest this is a key purchase in forecourt? While there are a few chocolates on the display, this could be further developed with placing gifts, and cards nearby in a more permanent manner could develop this occasion further and boost related sales?

The signage is very good in this store; clear, illuminated, high level category signs ensure easy navigation, supported by strong and simple secondary fins and headers. The in-bay illumination works well too, ensuring products are well lit and stand out.

This is an impressive store, and an obvious partnership between Asda and EG, which will, I am sure, roll out across more forecourt locations.”

Thoughts on the new format



Ian Scott

Ian Scott.
retail
consulting

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When we heard about the new format 'ASDA on the move' forecourt we were quite excited about what they were going to bring to challenge and push the boundaries on current thinking..... Here's what I think.....

Thoughts on the new format

First impressions:

- It's clean, clear and not unpleasant on the eye.
- Signage is simple, contrasts well and sits in a sensible position making it visible.
- They have worked with a couple of key brands to deliver 'out of the box' category solutions that have a certain familiarity with shoppers.
- They have given a nod to range of different shopping missions with "Food to Go" & "Food for Later"

Looking under the bonnet:

- The Store lacks some real key aspects of cohesion. The food offering sits up front 'on entry' yet frozen (which can be part of "Food for later / tonight" is hidden in the darkest spot furthest away. Added to which the product?fixture is broken into different spaces/equipment types. Not shopper friendly!
- A shopper language is used "Food to go" but the exceptionally well versed 'meal deal' isn't! The exclusion of a range of salty snacks and carbonated drinks is poorly missed opportunity (think basket size/average spend/ shopper expectations.
- We were not quite sure of the feature end floor placement of an over #('s vaping product. Perhaps these are the boundaries they've pushed

My summary:

Smart, clean & functional but lacking logic, innovation anything distinctly different or exciting. This would appear to leave 'EG' with a great opportunity for improvement in the future.



Roger Smith



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“I find the convenience sector one of the most fascinating and challenging sectors; combining different shopper missions, together with affluence and transience and creating a proposition that appeals to shoppers in such a small store footprint is a really tough challenge. This store has achieved this really well.

Forecourts are increasingly seen as convenience stores that also sell petrol, and so really need to appeal to the convenience shopper through the product assortment, merchandising and communication.

Good zoning aids navigation for shoppers on a mission, with Food To Go located at the front and clearly signposted for the shopper on the move. It is one of the most important categories in convenience retail and in many ways affects the shopper's perception of the whole store. Done well, this will drive loyalty and make this store a destination for many shoppers.

ASDA Walsall, the fresh food offering does look very fresh, I like the addition of chocolates with the flowers, encouraging additional purchase. At key seasons, there is opportunity to create more impact through occasion-led merchandising: I think they could be a bit more bold in the approach to this and make a name for themselves in seasonal events.

It looks like they have really thought about SKU density and not crammed too much into the space, which leads to availability issues, in turn putting pressure on replenishment at busy trading times. This is most evident in chilled drinks and crisps, where the range assortment looks to provide choice, without too much choice to the detriment of facings; too often you see single facing SKUs resulting in out of stocks because too much has been crammed in the space.

I didn't see any baskets in the store; this is a really simple sales tool in convenience: in studies I conducted over & years across nearly),\$\$\$ shoppers in a number of convenience stores, across all missions, age and gender, shoppers with a basket bought more than twice as many products as those without a basket; conclusion – place baskets two thirds of the way around the store in the top up area to grow your sales!”

Thoughts on the new format



Nick Widdowson

shopper **FIRST**

What's next?



ASDA...Minworth

This is a completely new store revamp with some very exciting new additions.

The new format will include a Costa Coffee, Timpson's, Sushi Daily, Tuk Asian Street Food and the most interesting addition is the new McDonald's which is built within the store with a 'McDelivery Courier Collection Area'.

Great to visit and I will write up a report on what I see.



**Let's
Talk....**

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