



Driving Digital Transformation in Fuel Retailing

Peter Van Nauw - May 17, 2022, Stuttgart



DFS *Worldwide* Brands

WE
ARE

OUR VALUES

A Collaborative
Entrepreneurial Spirit

Winning
Through Customers

Engaging
in High Ethical
Standards, Openness
and Trust

Fostering
Expectations for
Results

Respecting
and Valuing People



WE
ARE

OUR VISION

Enabling the
evolution of
consumer
experience in
fueling and
convenience retail.



WE
ARE

OUR MISSION

A leading global
provider of
advanced
customer-
focused
technologies,
services and
solutions in the fuel
and convenience
retail industries.



WE
ARE

OUR CULTURE

A team committed to
doing great things,
collaborating to
deliver exceptional
business results for
our customers. We
are accountable,
results driven and
create value, through
innovation,
continuous
improvement and
execution excellence.



WE
ARE

CULTIVATING EXCELLENCE

Aligned

Accountable

Engaged

Problem Solvers

**Customer-
Centric**

**Celebratory in
Success**

**Execution
Champions**



DFS *Worldwide* Brands



CLICK TO ACCESS HEXAGON FOLDER



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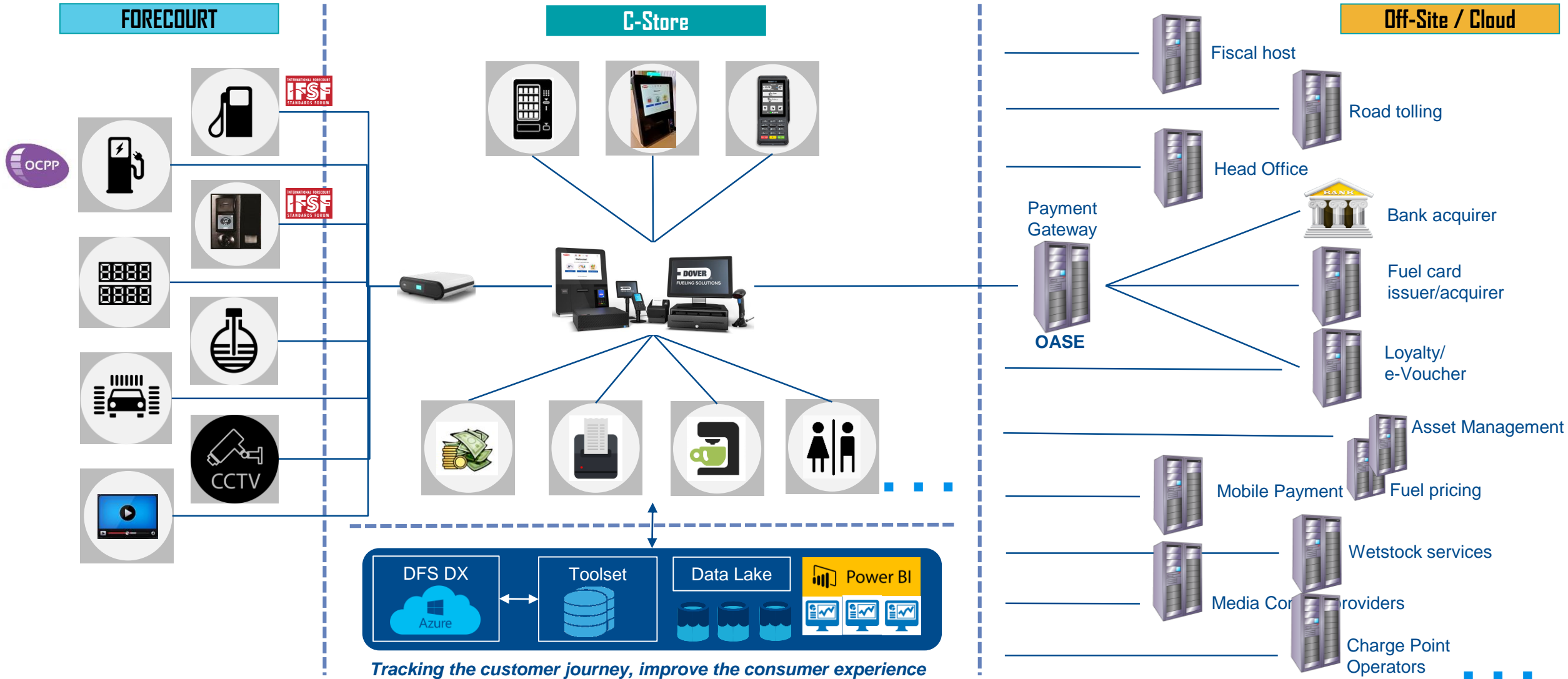
Customer Needs Have Evolved Creating New Opportunities

Tokheim Fuel POS launched 29 years ago optimizing fuel dispensing and payment



Revenue opportunities, customers, and technology will continue to evolve.

Evolving Site Automation Ecosystem



Consumer Expectation

Customized User Experience

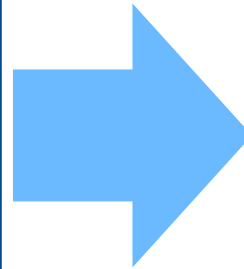
*Recognize me
Remember what I like
Speak my language*

Intuitive User Experience

*Connect to my device (mobile phone, car,
wearable...)*

Promotional Offers

Give me a deal



Business Opportunity

Build Customer Trust & Loyalty

Increased Throughput
*Frictionless shopping and checkout
(mobile payment, connected car)*

Incremental Revenue & Margins
Upselling & Cross-selling

Turn your fuel site into a place of convenience

Prizma: Connected Mobility & Convenience Retail Hub

Prizma Cloud Ecosystem

Analytics & Insights | OASE | DX Retail | DFS DX | Customer & Partner Integration



Easy On-Site & Remote Control



CONTROL



CONNECT



Prizma

Optimize Customer Experience & Site Profits



REFUEL



SHOP



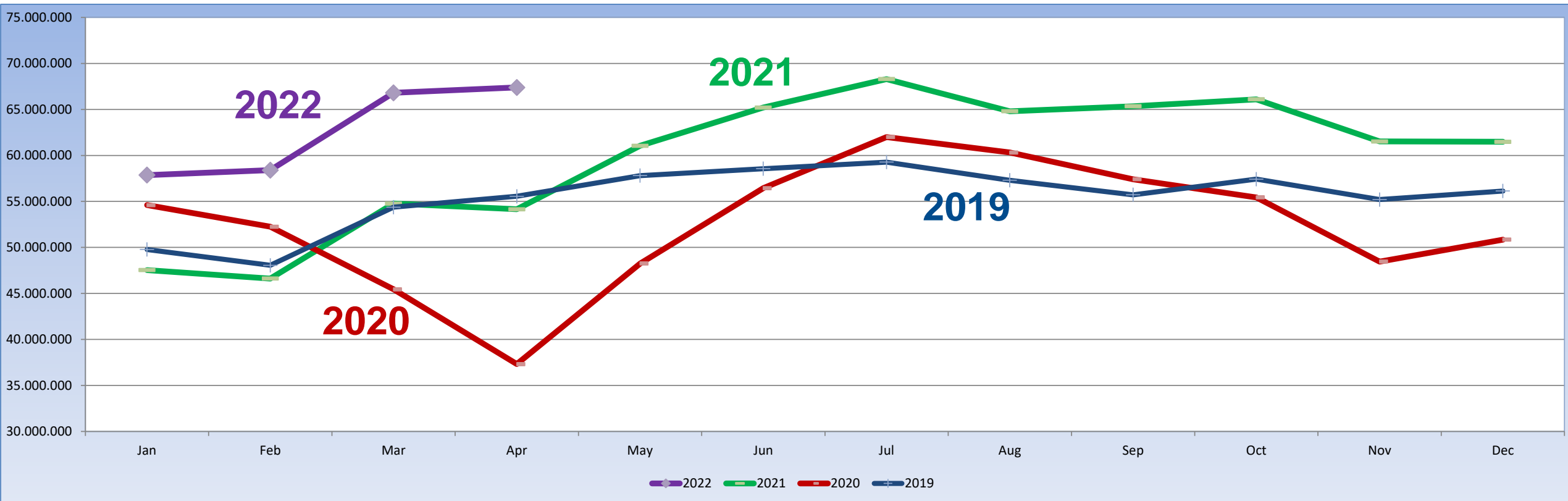
CHECKOUT



Evolve your business with more payment options, fuel types, connections and profits.

The changing face of payments

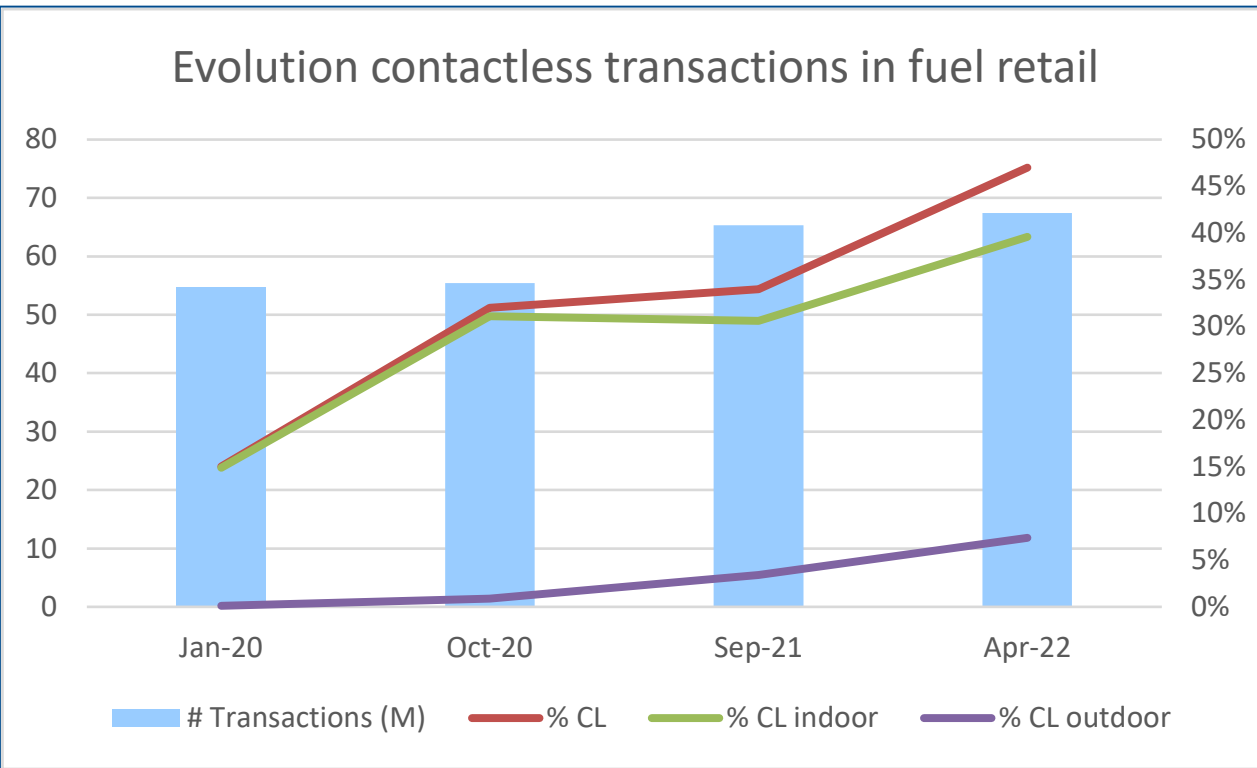
Impact of COV ID-1 9 on card payment transactions at fuel retail sites



Data from 15.900 fuel retail sites in 28 European countries

The changing face of payments

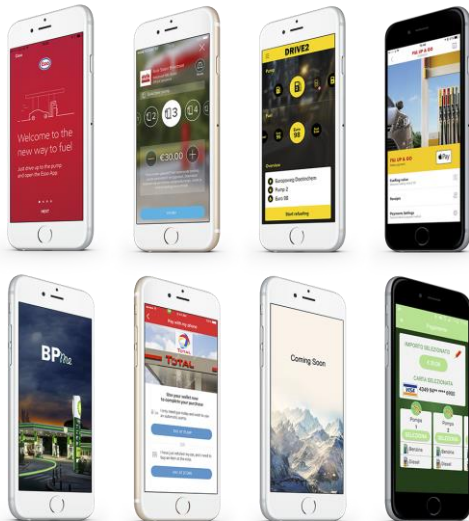
Evolution of contactless transactions in fuel retail



- Strong & solid growth of contactless transactions at fuel retail sites.
- However, still substantially lower than in standard retail
- Leading countries:
 - Cyprus: 89%
 - Netherlands: 65% (87% overall)
 - Scandinavia: 60%
- Outdoor contactless still lagging however more than doubled over the past 6 months to 7,4%
 - Cyprus: 26%
- Use of mobile phone on the forecourt remains a discussion item

Data from 15.900 fuel retail sites in 28 European countries

■ Key elements of the consumer experience



- Enrollment process
- User experience
- Available methods of payment (bank/fleet)
 - Loyalty and promotions
 - Fuel discounts
 - Rewards, vouchers
- Vehicle integration
- C-Store integration
- Pre-order & remote order solutions, pick & collect
- Allow for consumer feedback
- Create valuable partnerships

Key numbers:

15-20% of sites in Europe offer a form of outdoor mobile payment

12 S M A to M P P A connections

2 M P P A to D A S E connections

Active in 20 countries

Consumer journey transformation

Easy, fast and convenient fuel retail shopping is not only desired, but expected; consumers are evolving and are demanding an enjoyable and exceptional shopping experience

33%

of shoppers leave the store without buying if lines are longer than 7 minutes

50%

of shoppers avoid stores with long lines

73%

of shoppers prefer self-service technologies

88%

of shoppers are likely to buy if helped by a knowledgeable sales associate

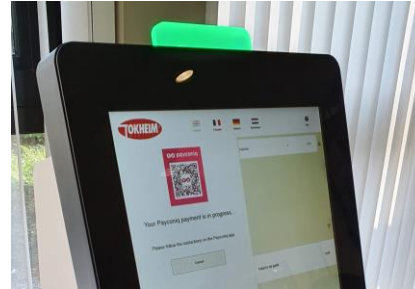
Self-checkout solution: Optimizing the User Experience


Happy customers
Avoid queueing


Better use of personnel
Lower operational costs


Speed & simplicity
Quick checkout & payment


Small footprint
Create fFlexibility in shop layout







Nederlands


Français

Deutsch

English

Help


Select your filling




Diesel
43.25 L - € 42.13

Don't see your filling?
Please try again or ask for help

Go back

Fuel

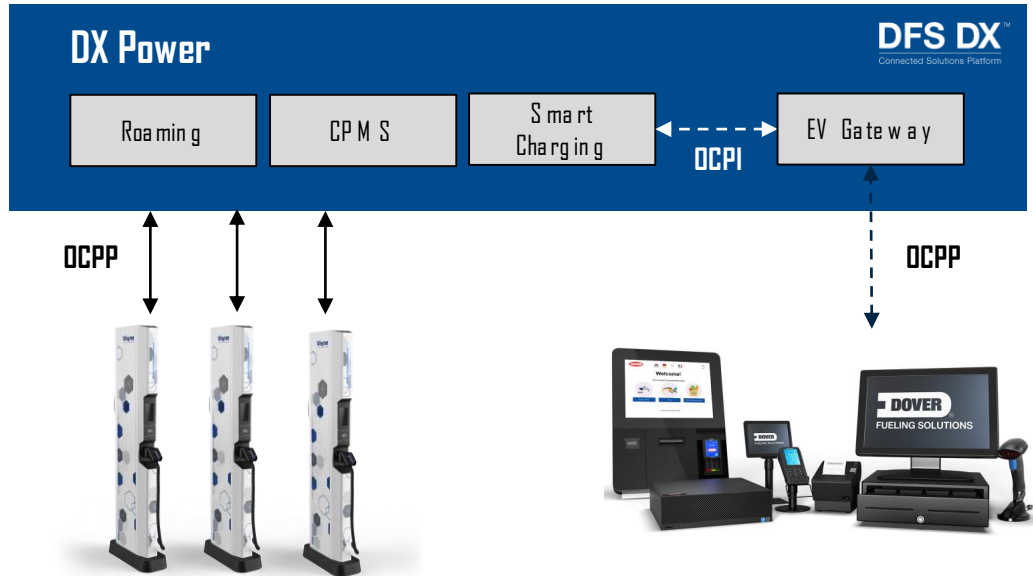
Articles without barcode

Total to be paid0.00

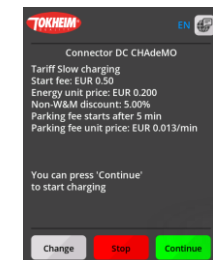
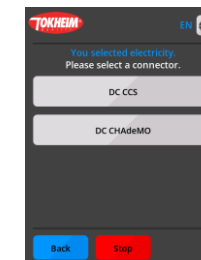
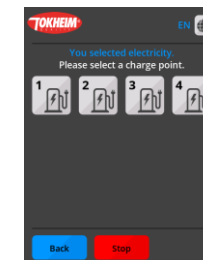
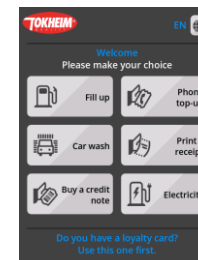
Cancel transaction

Pay

Bridging the EV Ecosystem with the fuel retailer's ecosystem through a modular cloud-based platform



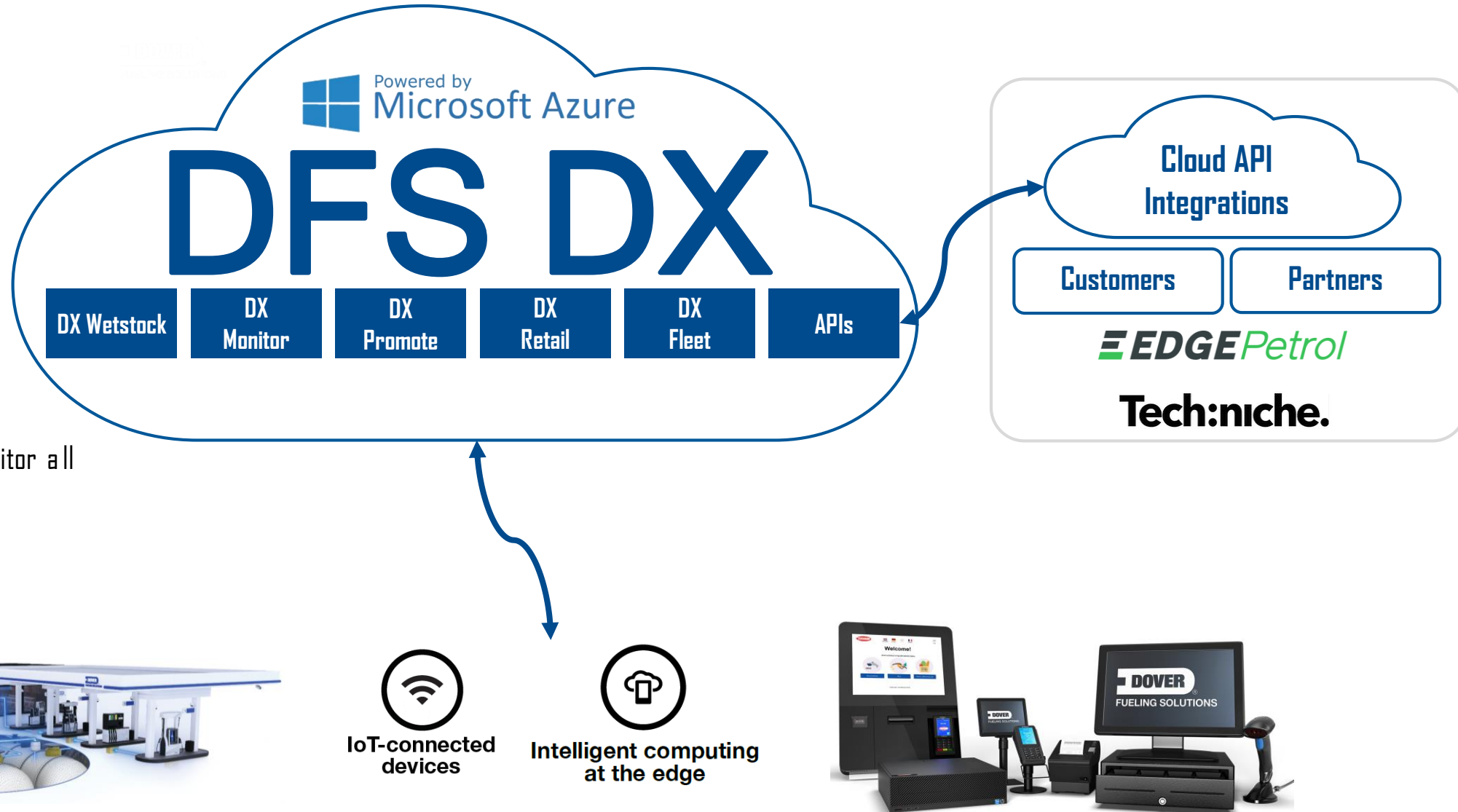
- Station management, smart charging, roaming and billing
- Enable bank & fleet card payments at the EV C via existing payment infrastructure
- Leverage existing loyalty and promotion programs
- Integrated site reconciliation
- Clear and modular tariff structure
- Integrated site monitoring and asset management
- Use of open industry protocols



Connected Solutions Platform

- ✓ Site Asset Optimization
- ✓ Transformed Customer Experience
- ✓ Frictionless Forecourt

- ✓ Scalable, secure platform
- ✓ All solutions share common platform services
- ✓ Open ecosystem
- ✓ Globally available
- ✓ Remotely manage and monitor all sites from anywhere



Digital Transformation at the Dispenser

Remote Diagnostics Module (RDM)

Reduce dispenser maintenance cost through connected dispenser technology



- Enable remote diagnostics & trouble shooting with advanced IoT technology to resolve issues without dispatch of engineer to site
- No dependency on consumers to report issues or further delays in reporting issues by site staff
- Optimal consumer experience with better nozzle availability from reduced dispenser downtime
- Cost avoidance from remote fix intervention without dispatch to site, but also resource redeployment to remote fix maintenance service
- Field efficiencies with improved first-time fix from pre-dispatch diagnostics ensuring right knowledge & spare parts

Reduce dispenser maintenance cost through connected dispenser technology

Efficiency Benefit	Calls
Site interventions that can be fixed remotely	14%
Repeat visits that can be avoided with improved first-time fix	12%
Avoidance of site visits with no fault found	7%
Sum	33%

Typical breakdown of maintenance calls; Based on PoC study with fuel retailer



Digital Transformation at the Dispenser

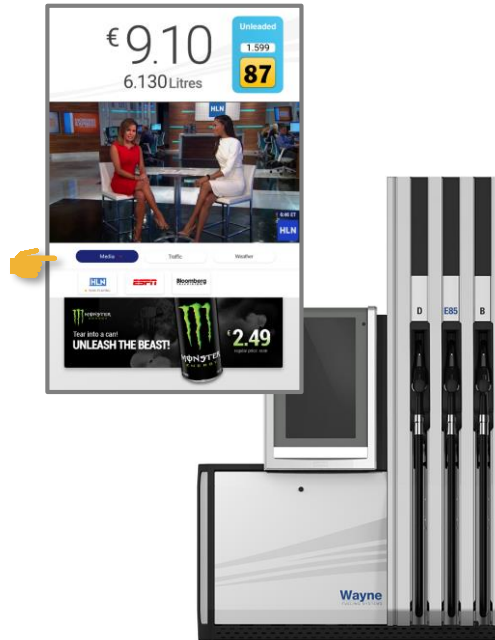
Anthem UX: Unique Customer Experience

Anthem UX is not simply a big media display...

**It is a complete solutions platform to deliver
a customized user experience at the dispenser**

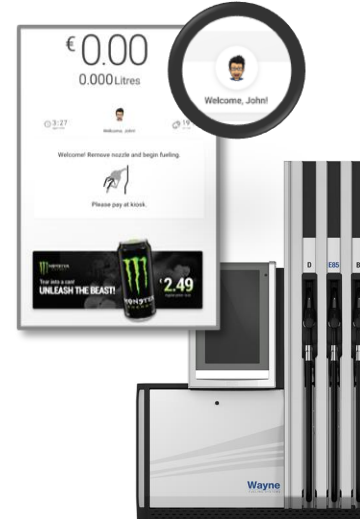


- Provides an intuitive user interface with superior promotional capabilities
- Offers fuel retailers new ways to interact with consumers on site
- Delivers personalized content to recognized consumers for maximum relevance
- Makes fueling simple, relevant & fun!



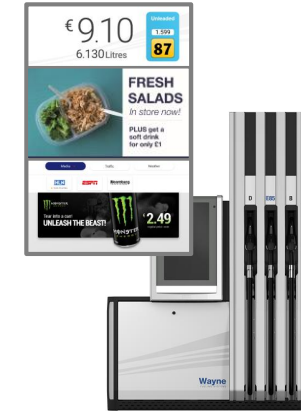
Anthem UX Entertains

- Engage with motorists with broad range of media content, including promotions and advertising
- As well as general content with multi-channel media selection like weather and traffic



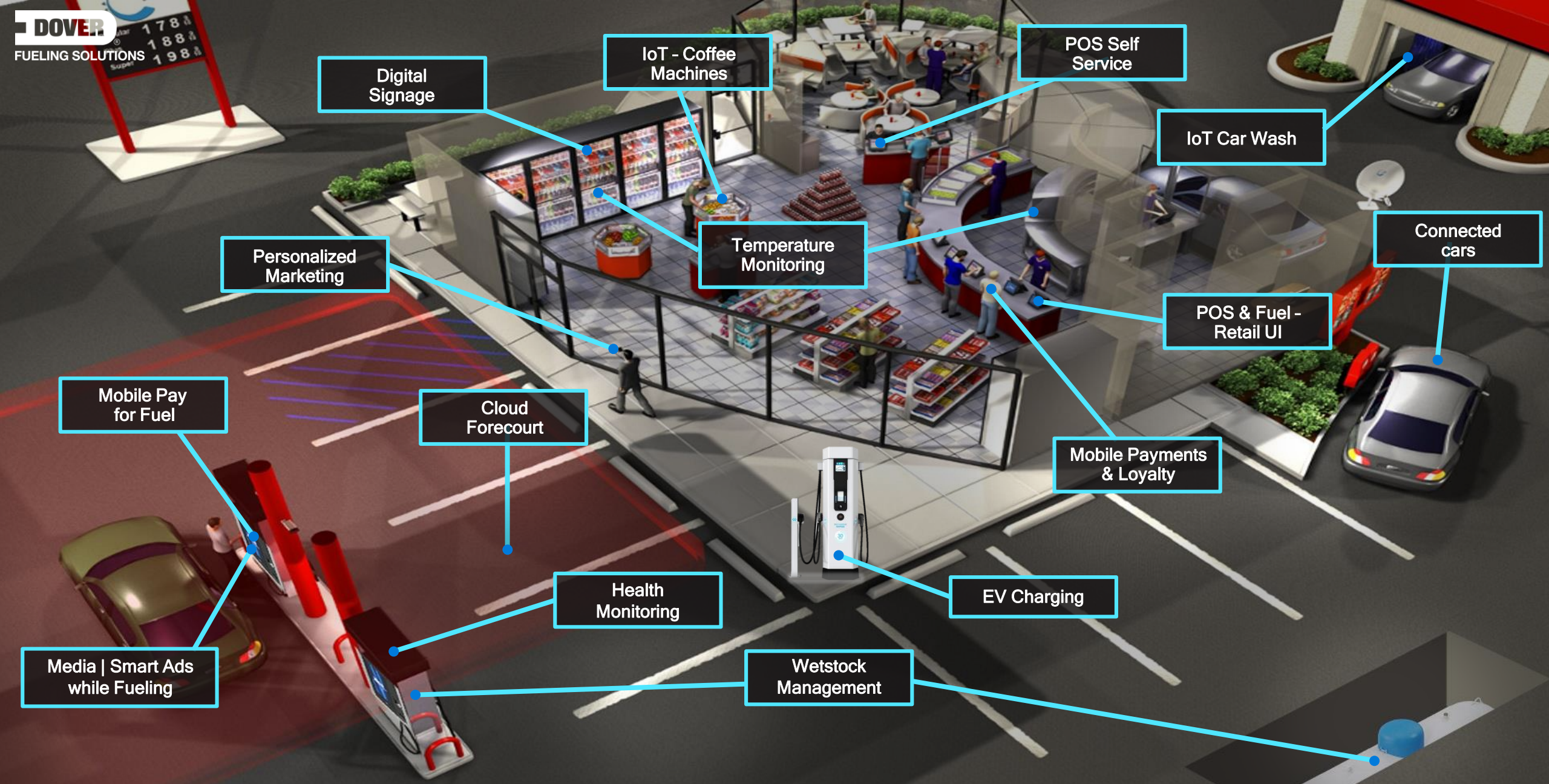
Anthem UX Detects

- Display transitions from idle state to customer greeting with detection of user proximity, and...
- has ability to greet the motorist with personalized greeting & relevant promotional content
- ... as long as they have registered & given consent on user portal



Anthem UX Promotes & Sells

- Promote in-store offers and premium fuel with advanced branding & advertising capabilities
- Use our platform to sync with your loyalty program to deliver targeted personalized content messages that resonate because we know who is watching!
- ... and link your site systems to drive cross-promotion like ordering a coffee directly from the fuel dispenser, or upselling an offer on pre-paid carwash for repeat visits



DFS Vision - Digitally Connected Fuel Retail Place of Convenience



doverfuelingsolutions.com