

Wake up & smell the coffee (shop)

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The UK coffee shop market has grown exponentially in recent years, with independent retailers driving branded chains to create a more distinctive experience, finds Retail Focus.

When was the last time you bought a cup of coffee? Chances are, many of you reading this have already indulged in a cappuccino, flat white or latte today. According to a recent report by London-based research consultancy Allegra Strategies, one in 10 UK adults now visit coffee shops

daily. It seems consumers are embracing the growing coffee culture trend in the UK, enabling the sector to somewhat outperform the wider retail market.

'The UK coffee shop market continues to exceed expectations by growing significantly in value, but also in outlet numbers,' notes Jeffrey Young, managing director at Allegra Strategies. 'High quality independent coffee shops are fuelling consumer demand and driving the branded coffee shop sector to increase focus on unique interiors and improved brewing methods within a wider, more artisanal coffee offer.'

The Project Cafe 11 UK report shows that more than 600 new coffee outlets opened in the UK during 2011, with some 15,084 branded chains, independents and non-specialist operators now keeping UK consumers in coffee.

According to another recent report from market research company Mintel, renewed outlet expansion by key players helped to improve growth rates in the coffee shop market in 2011. The 'affordable treat' and convenience positioning of the market has also helped insulate it somewhat from the fall in consumer confidence, says the report.

Over the last 12 months, Retail Focus has covered a number of new coffee shop concepts in the UK, including the Greggs Moment format from bakery chain Greggs, the boutique coffee roaster Small Batch Coffee Company in East Sussex, and the new Starbucks store design on London's Brompton Road.

As highlighted in the Mintel report, the UK coffee shop market is highly polarised between a handful of operators of considerable scale and a long tail of considerably smaller players. Costa Coffee is found to dominate the market in terms of outlets, with more stores than its two closest competitors combined, namely Caffe Nero and Starbucks.

Stiff + Trevillion, the architect behind the new-look metropolitan format for Costa, believes that large coffee shop chains in particular are adopting a more bespoke response in new outlets, where the brand impact is reduced, echoing the feel of intimate, independent cafes. 'Customers are looking for simplicity and authenticity in their coffee experience,' says Dan Campbell of

Stiff + Trevillion. 'There is an anti-corporate, anti-big brand mood, and design needs to reflect this by creating an environment that suits every customer need.'

'Store design is critical as many consumers have no brand loyalty,' continues Campbell. 'Many customers will simply choose the cafe with the shortest queues or most available seating. Design can play a huge role in building a loyal customer base.'

According to the Mintel report, loyalty is particularly low in the coffee shop market, making customer retention a key area of improvement going forward. However, Gemma Ball, insights manager at Portland Design (the agency currently working to refine the Caffe Ritazza brand), believes there is a strong sense of community in the independent coffee sector, especially within large urban spaces such as London. A complete opposite of the big brand competitors, she says, calling attention to coffee shop 'disloyalty cards', where one store encourages its patrons to try other local independent coffee shops. 'With that comes an inherent friendly, local, welcoming atmosphere and human interactivity often lost within busy cities,' says Ball.

With consumer demand for out-of-home coffee set to grow further in the coming years, we locate some of the latest innovative coffee shop concepts to launch in the UK and further afield.



Starbucks

Coffee giant Starbucks is on a mission to build environmentally friendly stores that fit into their local neighbourhoods. The Seattle-based coffee chain has recently unveiled a raft of unique store designs, including a stunning space in a former bank vault in Amsterdam, developed under the direction of Starbucks concept design director Liz Muller, and a remarkable new store on the main approach to the Dazaifu Tenmangu

shrine in Japan, designed by renowned architect Kengo Kuma.

Closer to home, Starbucks is also renovating some of its best London addresses as the capital becomes the centre of the world's attention this summer. The company is investing around £8 million on the renovations, including six key stores highlighting the brand's evolving yet undeniably Starbucks store design. As part of the redesign of the Vigo Street store, which re-opened at the beginning of April, the in-house design team has completely opened up the ground floor and created unique spaces in the different areas of the store. Original features such as the Turkish hand-carved mahogany and mother-of-pearl ceiling, Corinthian marble columns, and wooden flooring will all be restored and showcased as part of the new design,' said Thom Breslin, director of design Starbucks UK and Ireland, prior to the launch. 'We have also introduced a unique design concept that fuses the heritage of Starbucks with the heritage of Vigo Street, and this will initially be brought to life through wall coverings.

'In today's tough economic times, customers are looking for value and for that affordable treat – and a hot cup of coffee, delivered with a smile and enjoyed in a welcoming environment offers them just that,' maintains Breslin. 'It's why we are investing in our store design, but also in things like free Wi-Fi, free iTunes downloads and



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It's why we are investing in our store design, but also in things like free WiFi, free iTunes downloads and customer service enhancements.'



Nespresso

Swiss coffee company Nespresso is to open a new flagship store on London's Regent Street this July as part of the expansion of its retail network to more than 300 boutiques globally. The store will reportedly offer customers 'the latest in innovation' through its range of machines, while a dedicated coffee room will provide visitors with the chance to experience the quality of Nespresso portioned coffee, with specialists on

hand to guide tastings.

The store, designed in collaboration with Italy based Studio Parisotto, will also feature a club room, with warm colours and backlit images of existing club members, and a recycling zone, where customers can leave used Nespresso capsules and learn more about the company's recycling programme.

Although more coffee retailer than coffee shop, Nespresso does operate a number of boutique bars, including a coffee bar in SoHo, New York, which serves espresso and espresso-based drinks as well as light breakfast, lunch and dinner menus.

'The Nespresso business is experiencing significant growth in all corners of the globe but the launch of the Nespresso boutique in London's Regent Street demonstrates the importance of the UK market to Nespresso,' says Brema Drohan, managing director, Nespresso UK. 'Nespresso is providing a product that responds to evolving UK coffee tastes, trends and tendencies, through a combination of its reputation as a luxury brand and its robust retail offering.'



The Liberty of Norton Folgate

The Liberty of Norton Folgate, part of the Coffeesmiths Collective, opened in March between the City of London and Shoreditch. Conceived by Tim Ridley and Zoe Barker, the coffee shop is designed as a contemporary space where local workers and residents can 'relax and enjoy quality coffee'.

Designed in collaboration with retail specialist Boxco2 Consultants, the 60 sq m coffee shop has a simple materials palette and features a series of illustrations by co-founder Zoe Barker. 'We had a fundamental decision at the outset to fight the space or to let it dictate the feel and layout,' says Ridley. 'We chose the latter and I think that result is a space that sits comfortably both within the 201 Bishopsgate

building and in its relationship with the street.'

The naming of the shop, says Ridley, geographically locates it in the very small area and underpins the brand's understanding of coffee shops as social spaces.

Lighting is an essential part of the site, providing a sense of perspective to an otherwise vertigo-inducing ceiling height, says Ridley. 'The structures are based on the molecular structure of caffeine, were designed by me, and fabricated by Flux Metal.'

At 24m long, 8.5m high and just 2.6m deep, the space is like no other. 'The floor to ceiling windows and the proportions of the space fundamentally define the space and shape our customers' experiences,' says Ridley.



Roast & Conch

Earlier this year, Hotel Chocolat launched a revolutionary new Coffee versus Cocoa bar at its Roast & Conch store in the Seven Dials district of Covent Garden, London. The new concept brings together all of the British company's activities under one roof, from cocoa growing and chocolate making, to innovative cocoa-based drinks and food. At the Coffee versus Cocoa bar, customers are presented with a drinks menu written in familiar coffee language but, as the name suggests, they have the choice of ordering their latte, flat white or cappuccino with cocoa freshly roasted on the premises or with coffee beans.

The store design, created in collaboration with Terry Moore Design, follows the ethos of cocoa grower, roaster and chocolatier, all rolled into one idea. 'In line with the company's ethical policy, the interior relies on the use of existing building fabric and a host of reclaimed materials, but most importantly the function of the production process provides its own atmosphere and excitement,' explains designer Terry Moore. 'The sights, the aromas and the taste are truly a unique and exciting environment.'

The concept is about authenticity, says Moore, and so the interior relies on the aesthetics of the theatre kitchen, with an array of stainless steel surfaces and engineered chocolate-making machinery. 'To complement this, the walls, floors and furniture are worn and warm post industrial with some St Lucia references that proved so successful at the Borough Market cafe/shop,' says Moore.

A second site is currently under construction in Copenhagen, with other boutiques planned in the UK, Europe and the US.



Small Batch Coffee Company

East Sussex-based Small Batch Coffee Company was shortlisted in the WAN Retail Interior Awards last year, in the less than 200 sq m category. The company initially started as a wholesale coffee roasting business, working out of a small industrial unit, selling freshly roasted coffee to cafes in and around Brighton and Hove. It opened its first coffee shop at the Roastery on Goldstone Villas in 2009 and now has three permanent

shops and two mobile coffee carts.

For its Wilbury Road location, Small Batch Coffee Company worked with Chalk Architecture to create a place where customers can taste and experience the creation of high quality coffee. The brief was to create an environment that highlighted the process of roasting, grinding and brewing superior coffee, while making the customers feel like king. The biggest challenge for Chalk, said the firm's co-founder Paul Nicholson at the time,

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was to make the space feel part of the Small Batch independent coffee brand while incorporating its own neighbourhood style. 'The rustic interior evokes a sense of the history and process of the coffee trade: part warehouse interior, part antique luggage trunk.'

The brand has since opened a third site at myhotel Brighton, which embodies its signature contemporary, relaxed interior but with some new twists. 'For the myhotel site we wanted to stay within the spirit of the Small Batch identity whilst moving the look forward to fit both the location in the heart of North Laine and the site as part of a boutique hotel brand,' explains Nick Barlow of Small Batch Coffee.



M1k

Contributing to the community of independent businesses in Balham, London, M1k is a new coffee shop founded by former TV actors Lauren Heaphy and Julian Porter. Opened in February 2012, the shop interior celebrates craft and 'the days when things were made to last', using natural materials and a neutral colour palette. 'We wanted to use calming colours that we associate with nature and family,' says Heaphy. 'Our ethos draws on old fashioned values and we wanted our design to reflect that.'

Interior design elements include a display bench top made from old wood, exposed brickwork and vintage wallpaper and chandeliers, sourced from car boot sales and vintage shops.



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