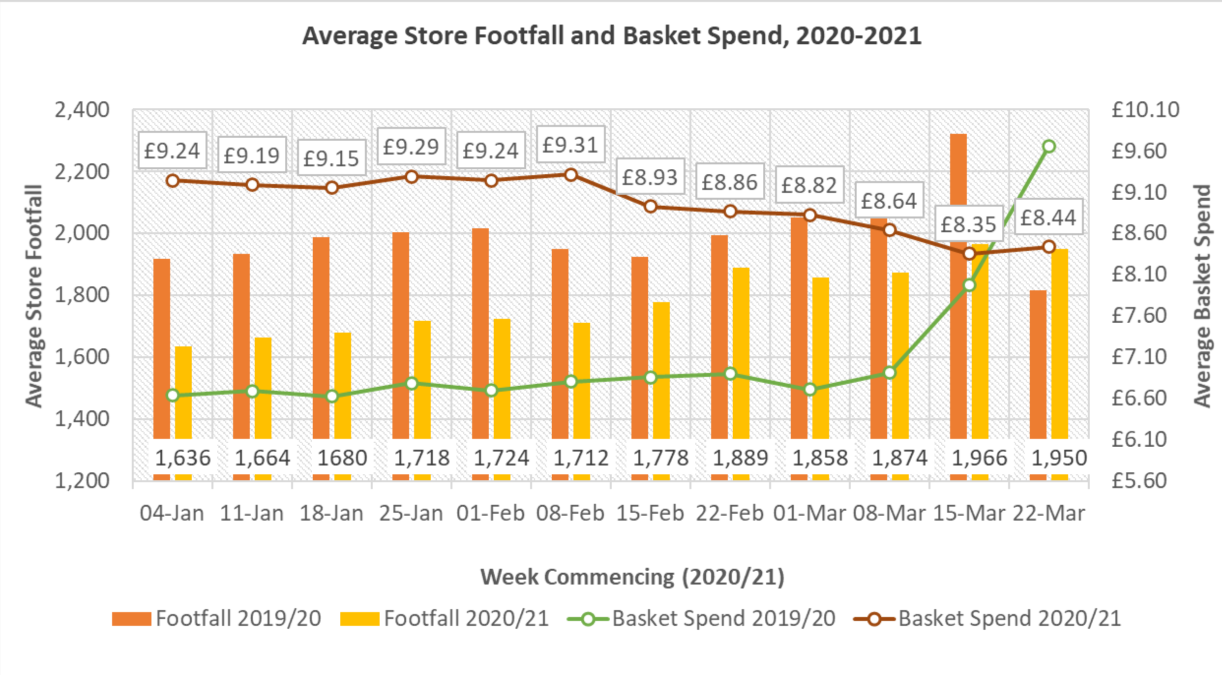
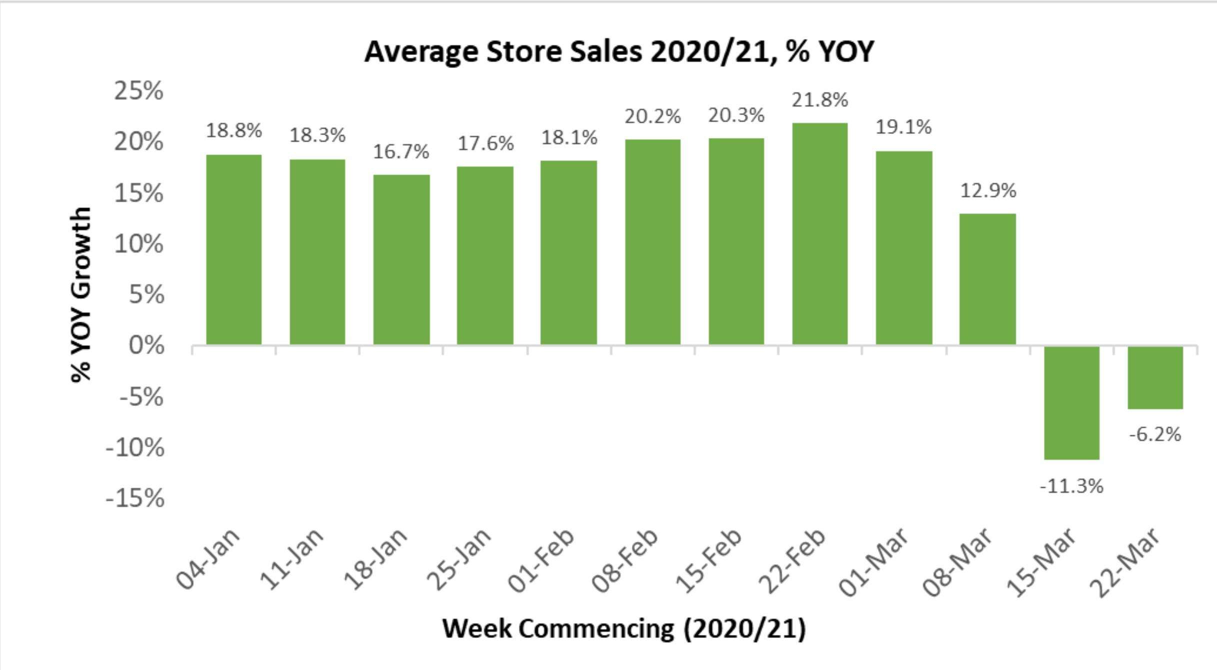
COVID-19 Impact on the UK's Independent C-Stores

The report shows average footfall, turnover, basket spend and category sales growth in the UK's symbol and indie convenience stores on a 12-week rolling basis. As a point of reference, the 1st Government Public Announcement on COVID-19 virus pandemic measures was on 12th March and the second announcement for lockdown in England was on 4th January.

WEEKLY AVERAGE FOOTFALL, BASKET SPEND AND SALES, 4 JAN – 28 MAR 2021



NB: Footfall refers to number of shopper baskets (transactions)



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Breakfast Cereal & Breakfast Bars

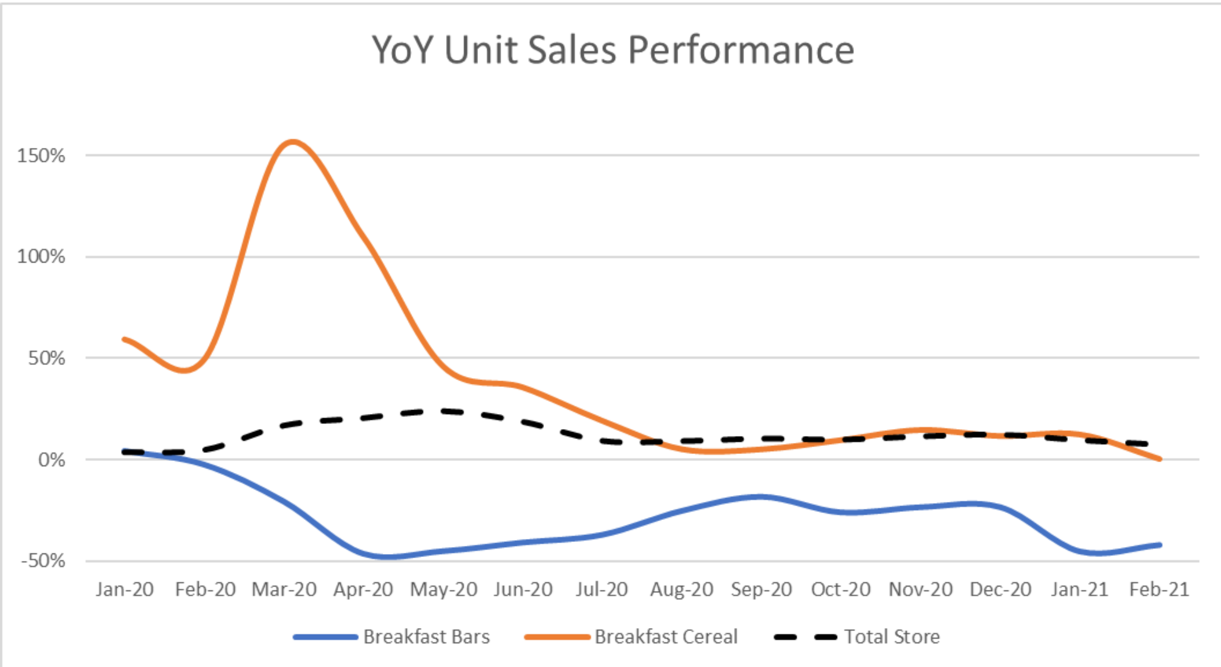
This report looks at how COVID-19 affected sales of boxed cereal and breakfast bars. With lockdown meaning more people were at home, did the absence of a commute mean more time to prepare and enjoy breakfast? Was there less demand for on-the-go options such as breakfast bars and more demand for boxed cereals?

NB – 'Breakfast Bars' includes Breakfast Biscuits, Cereal Bars and Granola Bars which would provide an on-the-go breakfast solution.

Monthly Year on Year Performance:

As we can see from the chart below, there was a significant increase in unit sales for Breakfast Cereal when Lockdown 1 began. This is much higher than the growth seen at store level as a whole (illustrated by the dashed line). Shoppers found themselves with time to eat breakfast as they were now at home, but needed to replenish their cupboard stock of cereals. After a couple of months, this growth slowed and, with the easing of restrictions during the summer, fell in line with average growth levels.

In contrast, Breakfast Bars sales fell in March 2020, as the need for on-the-go breakfast solutions diminished. There was a slight recovery through the summer, but year on year performance continued to show a decline. This decline was impacted again as the country entered another lockdown at the start of 2021.



Regional Focus:

Looking at the change in rate of sale for the peak month of March 2020, London saw the greatest increase in Breakfast Cereals, and the greatest decrease in Breakfast Bar sales. London usually has a high transient population but during lockdown, the number of commuters fell significantly, leaving virtually no demand for on-the-go products.

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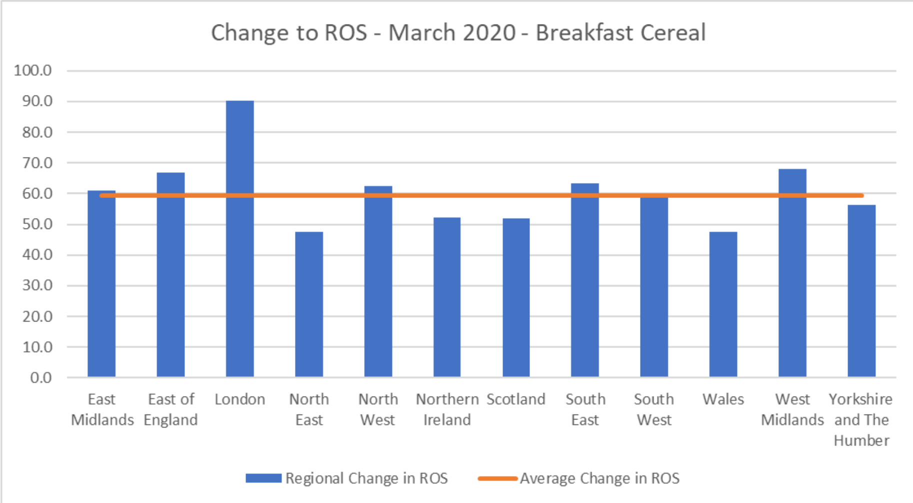

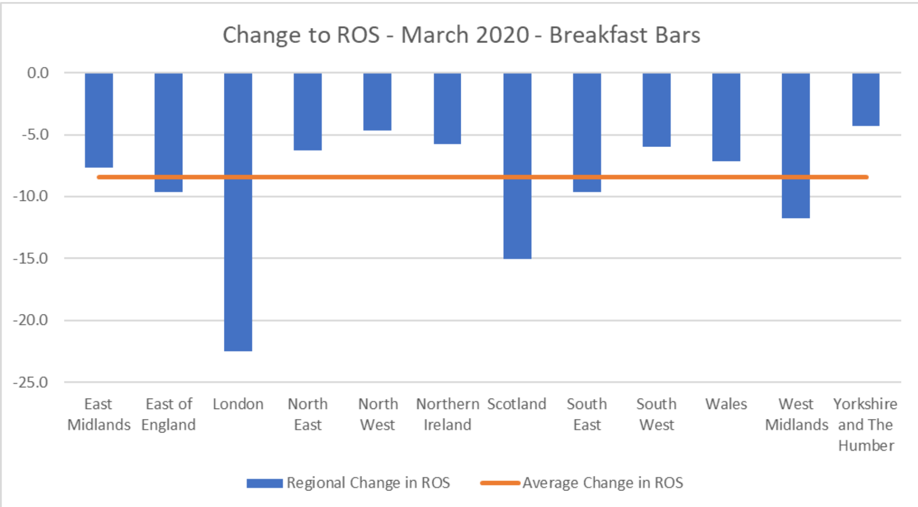

Biggest sellers in Breakfast Cereal in March 2020:

The table below shows the biggest selling products in Breakfast Cereal during the peak sales in March 2020. The average rate of sale is also shown to give some context. It is also worth noting that these 10 barcodes account for 59% of total breakfast cereals in this month but are only 11% of the total number of barcodes. Sadly, there are no new breakfast cereals to look out for to take advantage of this good performance.

Barcode	Description	Average Units per Store
5053827169899	Kelloggs Crunchy Nut Cornflakes 500g	10.4
5010029217162	Weetabix 430g	8.4
5053827211345	Kelloggs Coco Pops 480g	8.0
5053827171472	Kelloggs Cornflakes 550g	7.2
5053827170017	Kelloggs Frosties 500g	5.2
5010029217223	Weetabix 264g	5.2
5053827169981	Kelloggs Rice Krispies 510g	4.4
5053827170222	Kelloggs Krave 375g	4.1
5000108280163	Quaker Oat So Simple Golden Syrup Pot 57g	3.1
5053827191753	Kelloggs Variety 190g	2.9

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STORE SAMPLE

The data in this report is drawn from 3,028 independent symbol and unaffiliated convenience stores. The breakdown is as follows: 351 stores in Wales, 264 stores in Scotland, 23 stores in Northern Ireland, 2,390 stores in England.

About TRDP Data Services

The Retail Data Partnership Ltd (TRDP) provides pure SKU and barcode level EPoS data from c. 3,100 independent symbol and unaffiliated convenience stores, collected daily via our own proprietary EPoS system. TRDP do not estimate, project or smooth out the data and therefore it provides sector suppliers an accurate view of category sales trends and distribution of their products. TRDP data services include:

- Cleaning of raw EPoS data – identifying stores with data gaps and reconciling product descriptions at SKU level for accurate sales statistics;
- Providing access to stores for suppliers to deliver distribution & R.o.S.-enhancing campaigns, which can be tailored further through shop-profiling;
- Aggregating store- and barcode-level data as per client's requirements.

We work with leading FMCG suppliers to the independent convenience channel, wholesaler partners, management consultants as well as academic institutions to help them drive sales in the channel, improve their offer to independent retailers, and understand the impact of legislative measures on retail sales. Our unique proposition (not available from any major EPoS data houses):

- ✓ Data from an identifiable set of stores
- ✓ Unmatched granularity and accuracy down to each individual shopper basket
- ✓ Bespoke KPIs
- ✓ Concept testing and new product trials in-store
- ✓ Shopper coupons distributed to consumers via store tills
- ✓ Independent retailer surveys
- ✓ Retailer communication campaigns

For any data related enquiries, please contact Stephen Burnett on 01780 483041, Stephen.burnett@retaildata.co.uk

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