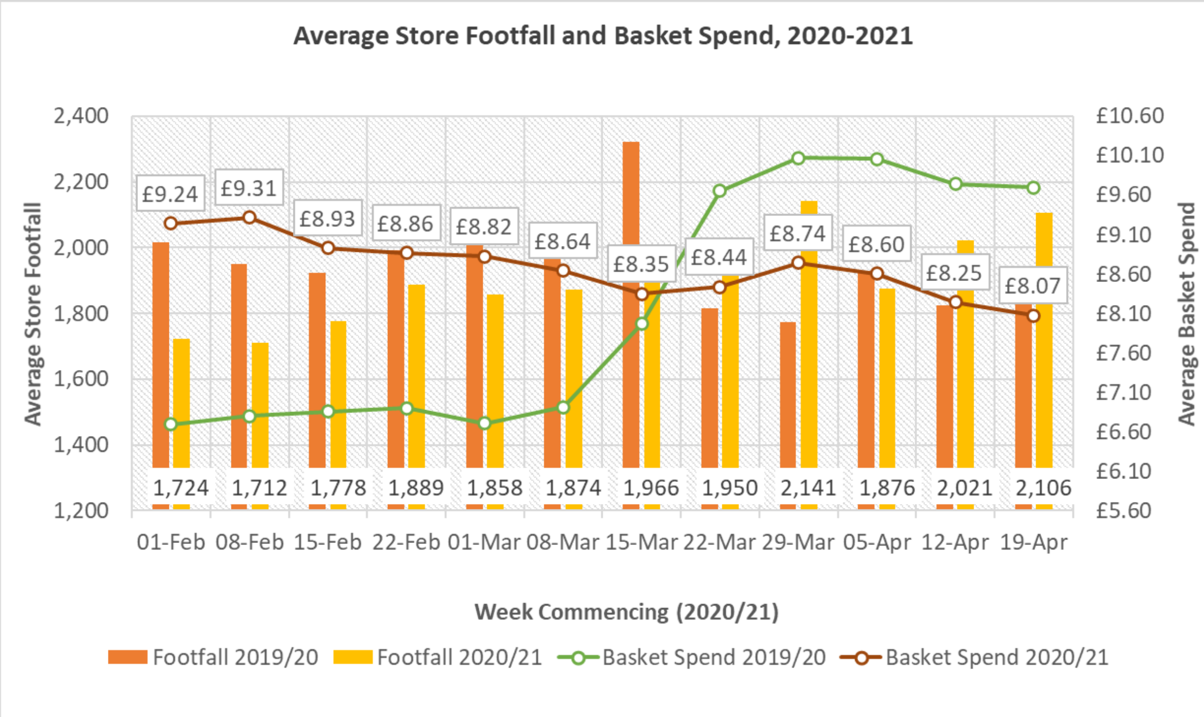
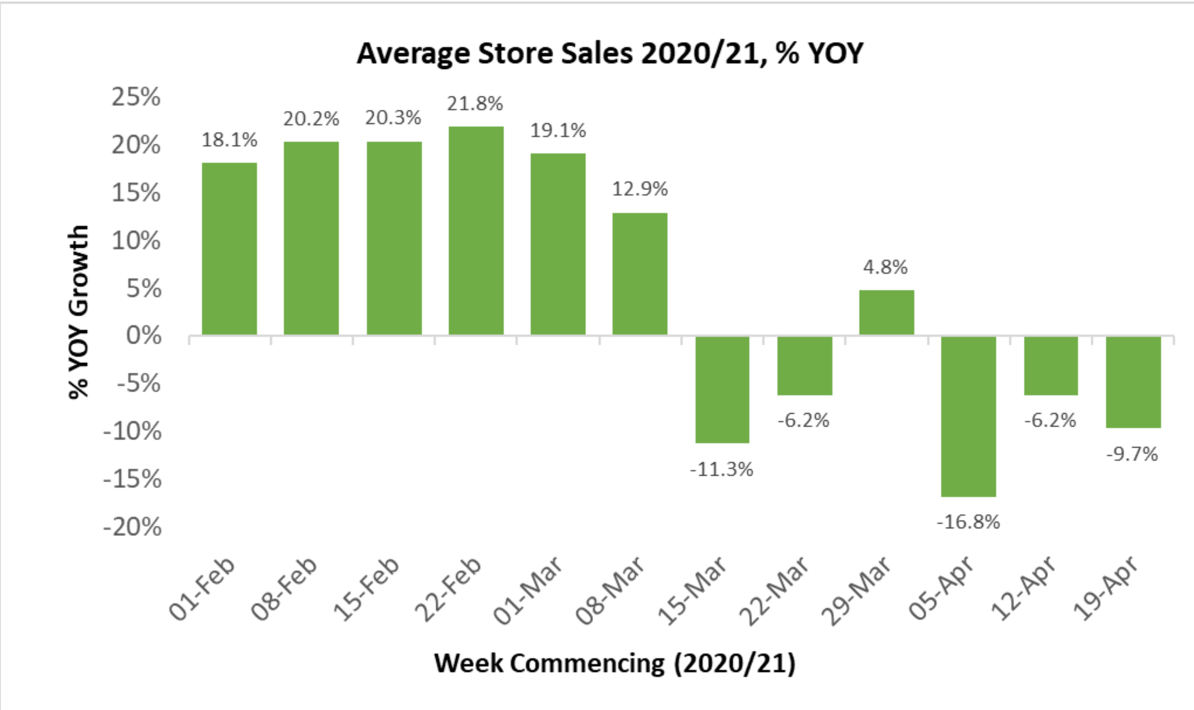
COVID-19 Impact on the UK's Independent C-Stores

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 2020 and the second announcement for lockdown in England was on 4th January 2021.

WEEKLY AVERAGE FOOTFALL, BASKET SPEND AND SALES, 1 FEB 2021 – 25 APR 2021



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



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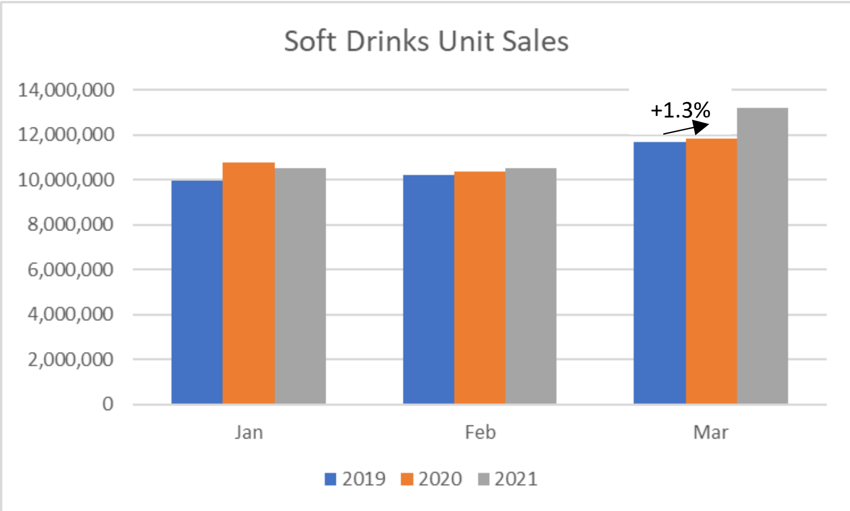
Focus on Soft Drinks

This report takes a look at the soft drinks category and how buying behaviour has changed due to the effect of COVID-19. The report uses data from January – March in 2019, 2020 and 2021.

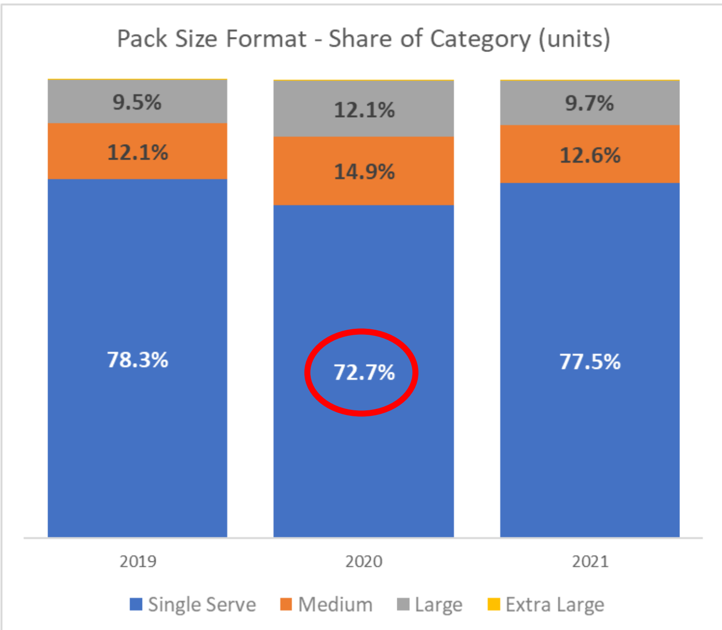
Performance in Lockdown #1:

As the UK made plans to enter the first lockdown in March 2020, the convenience sector started to see an unprecedented rise in sales across a number of categories. However, the Soft Drinks category growth was lower than that seen for total sales. (Soft Drinks +12.7% value growth; Total Sales +18.9% value growth – March 2020 vs 2019)



Unit sales indicated that there was only 1.3% growth for March, so why were volume sales being affected more than value sales?

Pack Size Format & Product Type:



Single Serve formats (up to 750ml) make up the largest share of this category, but as shopper's needs changed in early 2020, single serve market share was lost in favour of larger pack formats. Drinks for consumption on the move were in less demand, replaced by a need to stock up with bigger packs, offering better value, to be consumed at home.

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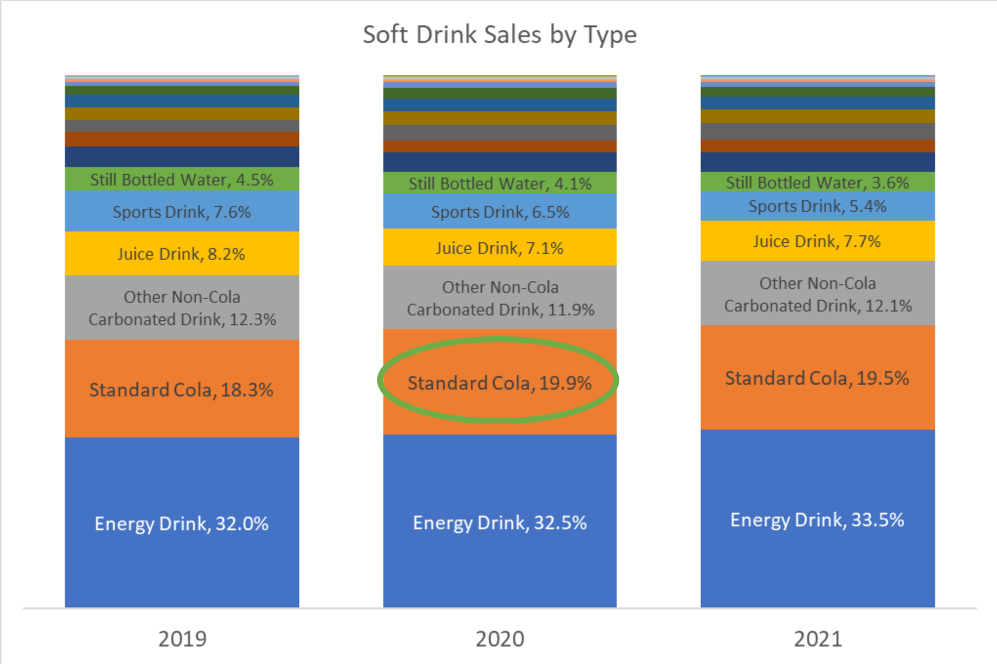
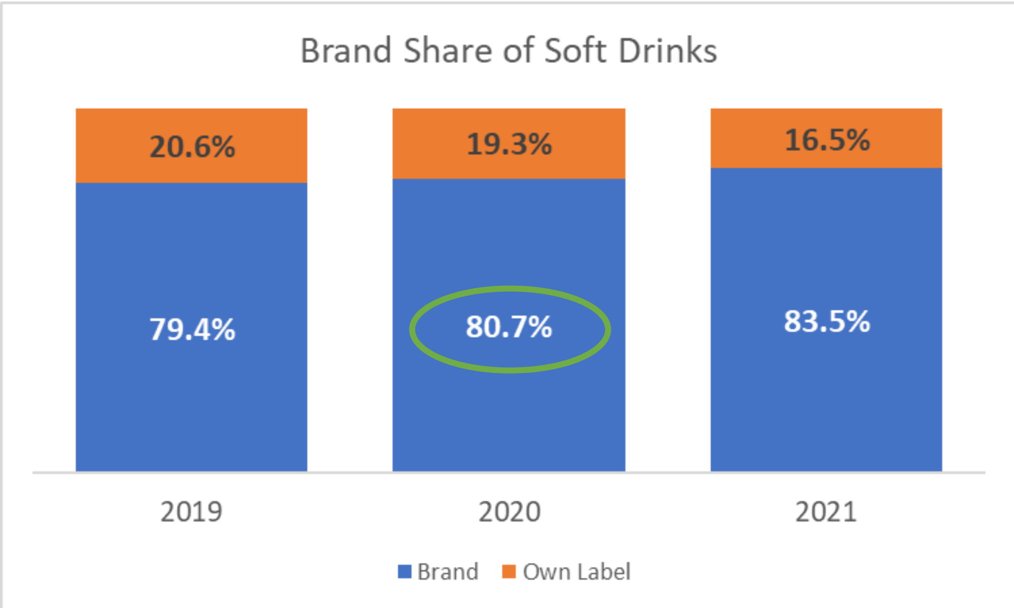


There were no significant changes to the type of soft drink, other than a slight increase for standard cola. As the dominant product type in Large and Extra Large formats, the increased sales of these sizes helped drive market share. (Energy Drinks have the largest share of the Single Serve format).



There was a slight increase in share for Branded Soft Drinks. Despite the Extra Large format representing a small share of this category, it saw growth of 48.1% in 2020, and is made up entirely of Branded products.

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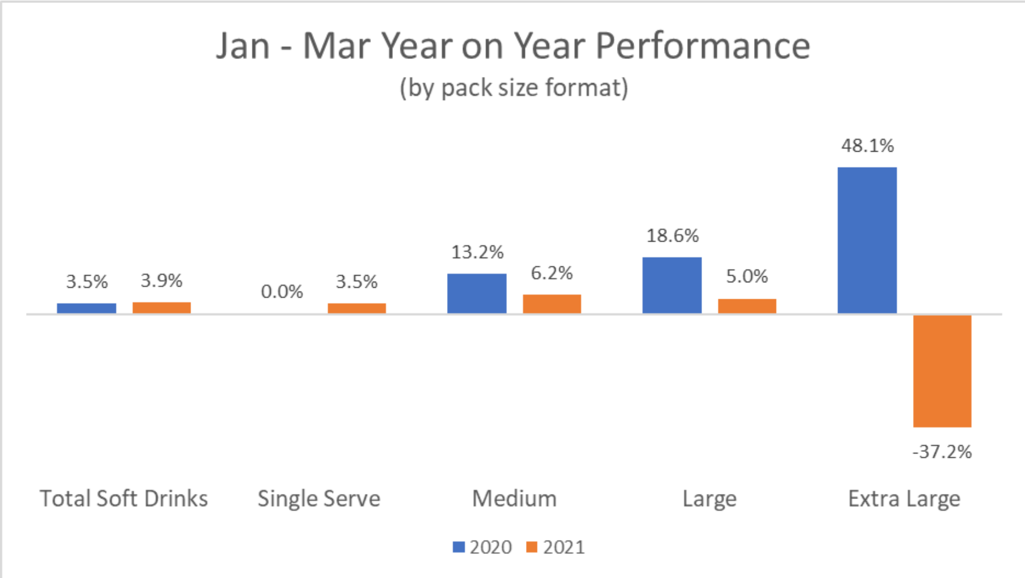
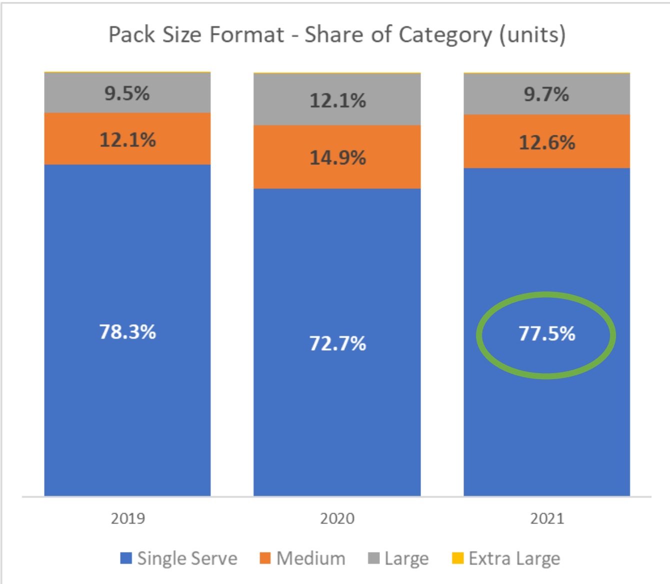
Annualising lockdown #1:





Looking at year on year performance for the last 3 months, there was growth of 3.9% for the category as a whole, driven by the recovery of Single Serve formats. This allowed category share of single serve to increase to 77.5%, just shy of the share seen in 2019. Growth of Medium and Large formats slowed but remained ahead of total growth. Sales of Extra Large formats saw the biggest swing in performance in both years, but represent a very small part of the category. (Predominantly made up of 10/12/24 packs of canned cola).

As restrictions continue to ease and people start to return to a 'normal' life, we expect the demand for single serve formats to recover, and drive further growth for this category. This will coincide with the peak selling months, providing that the sun eventually comes out! An unseasonably cold April has seen Soft Drinks sales fall back on March figures but still ahead of April 2020.

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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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