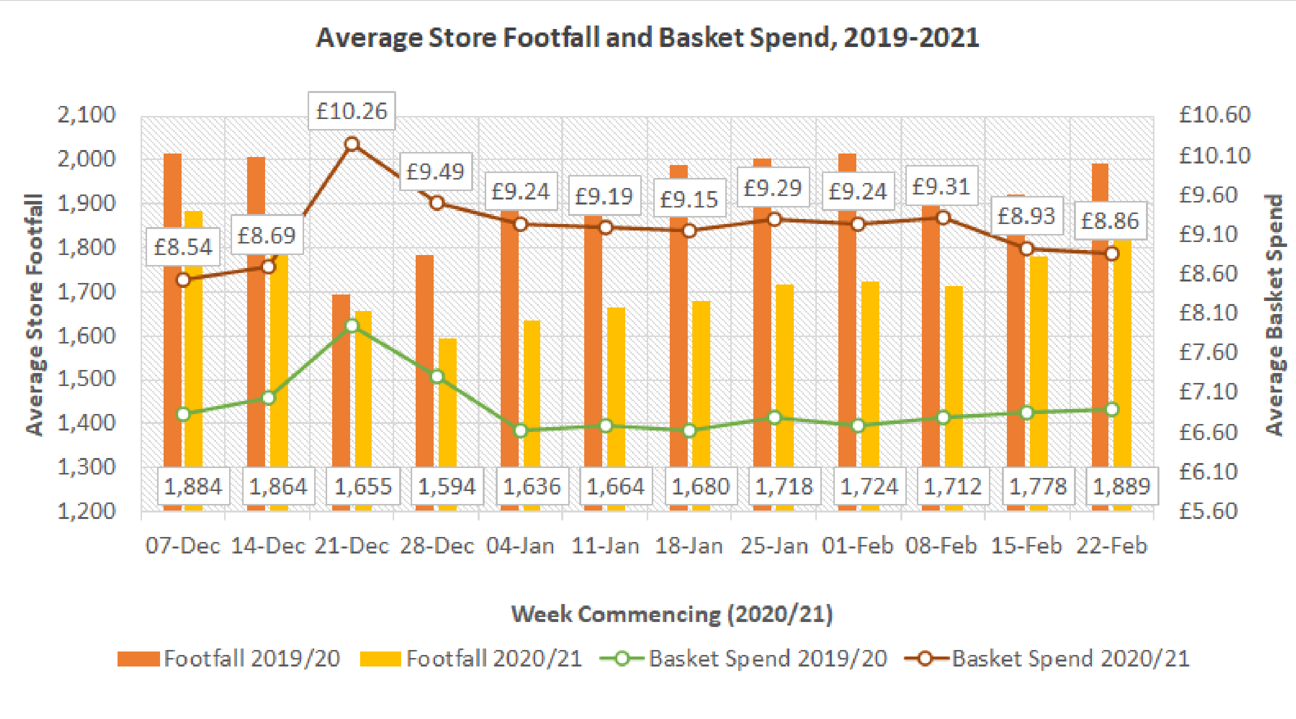
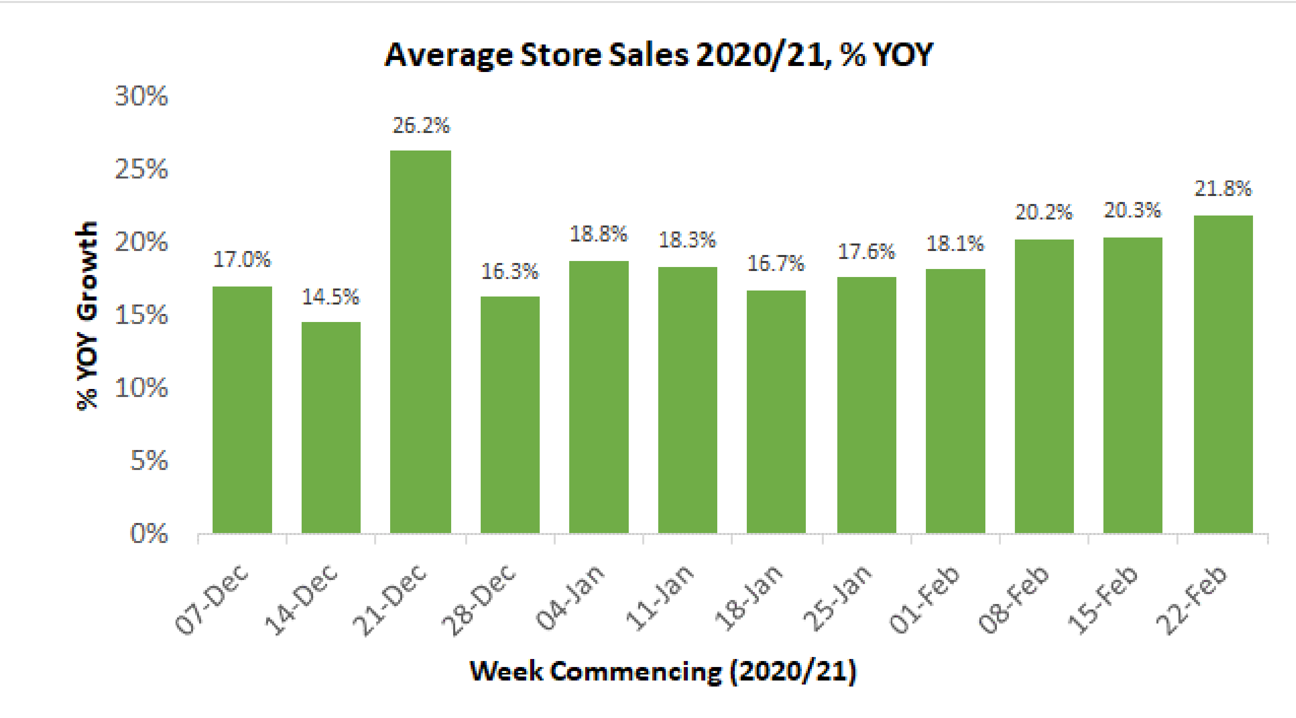
# COVID-19 Impact on the UK's Independent C-Stores

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, 23 NOV 2019 – 28 FEB 2021




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





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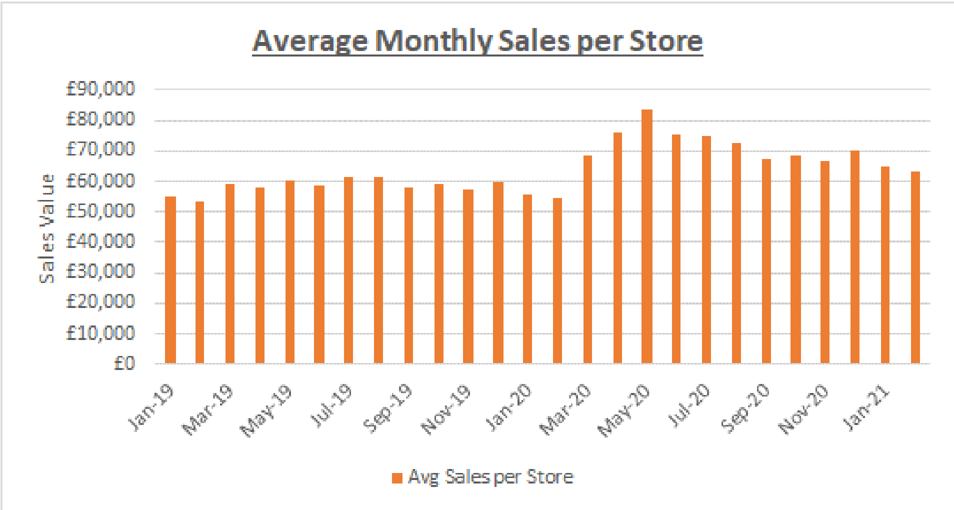
# Twelve Months of Covid-19

The impact of Covid has now been felt for almost twelve months so we wanted to look at the changes in the convenience sector over this period.

## Sales per Store:

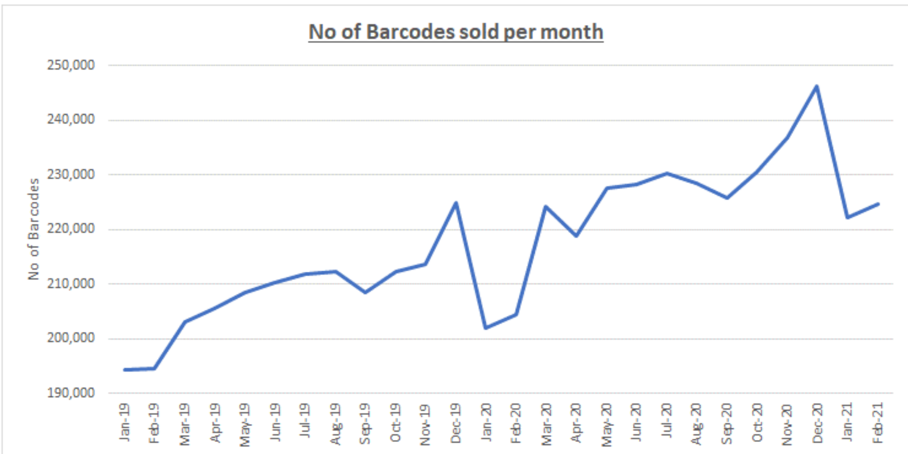
As we can see below, the average sales by store increased significantly at the start of lockdown, and continued to stay above pre-lockdown levels. The number of stores trading did drop in April and May, but they too are now at a higher level than pre-lockdown.




In twelve of the fourteen months prior to the lockdown announcement the day of the month with the most transactions was a Friday between 2pm and 4pm (the exceptions being Easter and the second May Bank Holiday). In the twelve months since the announcement, things have been much more erratic. In only five of the twelve months do we see Friday between 2pm and 4pm being busiest. Whilst we might expect that the busiest times of day were earlier, with more people being at home, they are actually later – three of the seven months are still Friday but between 4pm and 6pm, and a further three are on Saturday. In June the busiest time was on a Wednesday 24$^{th}$ between 4pm and 5pm.

## No of Barcodes:

Whilst the underlying pattern for the ever-increasing number of barcodes within c-stores is clear, the volume of barcodes in the last 12 months shows a significant increase as retailers had to become more creative in sourcing products initially, (with some buying-in own-label products from the multiples) and have continued to try to meet the changing need of their customers.





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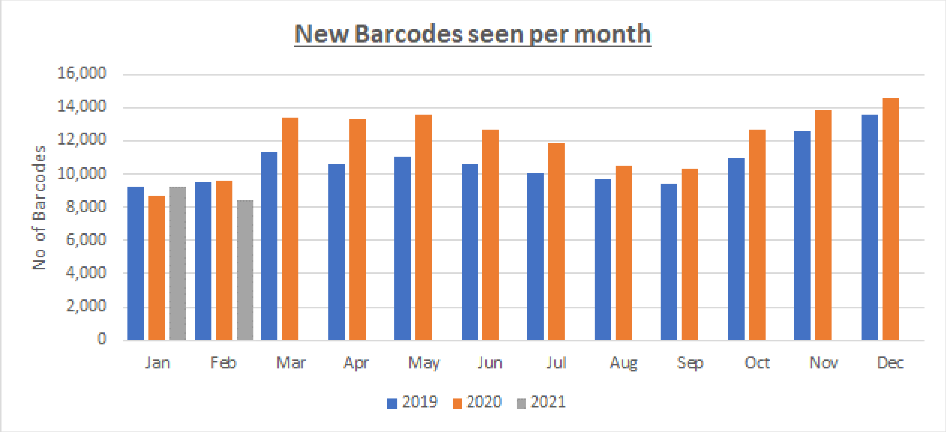
## New Barcodes:

Across the TRDP estate we can see that new barcodes have continued to be introduced throughout 2020. A new barcode is defined as a barcode which has not been seen previously in any of the stores across the estate, so could be a new pack size or price marked product.




Looking at some of the new barcodes that did well over the period:

In April we saw Middleton's flour appear as c-store tried to meet the demand as those staying at home starting baking and making bread:

5028081011079 Middleton Self Raising Flour
5028081011086 Middleton Plain Flour

We saw new tobacco brands following the menthol ban being implemented:

5000143923025 Sterling Kingsize New Dual
5000143915426 Sovereign Kingsize New Dual
5000143924336 Sterling New Superkings Green
5000432013420 Players Crush Leaf

There were several Confectionery successes, particularly around Chocolate Orange combinations:

7622201440176 Cadbury Twirl Orange
3664346322201 Terrys White Chocolate Orange Bitesize
7622201438043 Cadbury Orange Buttons
7622201449810 Cadbury Orange Fingers
7613287127709 Kit Kat Chunky White
7622201440176 Cadbury Twirl Orange
7613287127709 Kit Kat Chunky White

The top performing new products of last month, which will be worth watching in the coming months include:

4600680014982 Kit Kat Marbled Finger Zebra
8593893774759 Aero Dark Milk Peppermint Block
8593893774858 Aero Dark & Milk Block
90446894 Red Bull Cactus Fruit
7613287112989 Rowntree Smarties Orange Block



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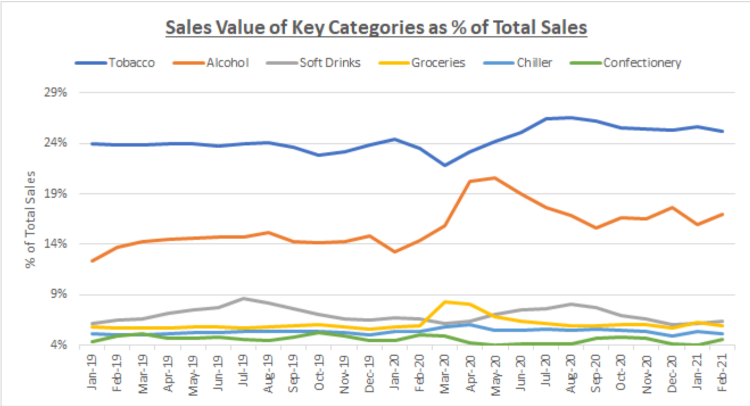
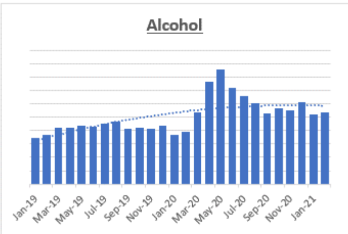
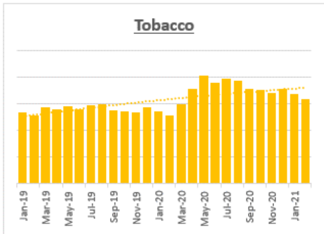
## Performance of Key Categories:

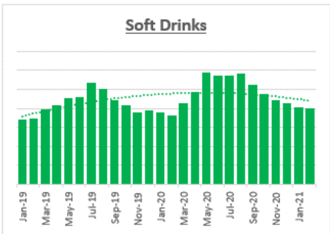
We can see below that the key categories have maintained their overall percentage of c-store sales, with noticeable increases in alcohol and tobacco.

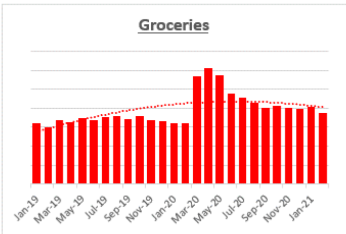


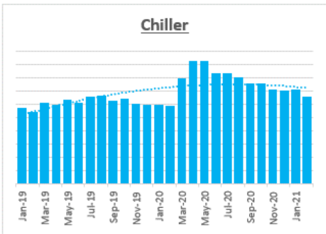

When we look at actual sales within these categories we can see a common underlying profile but whilst Soft Drinks have stuck to their seasonal profile, Alcohol has certainly been a significant contributor to turnover (with the closure of the on-trade) and Tobacco sales continue to increase.

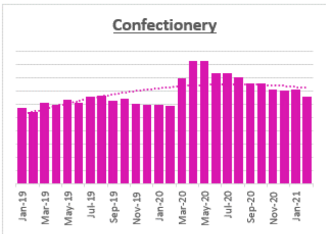


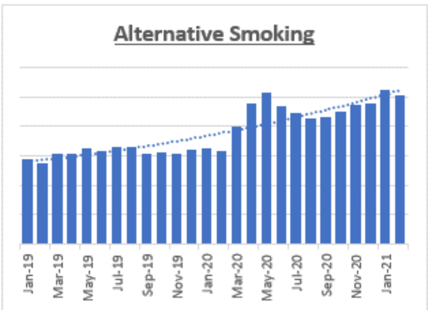



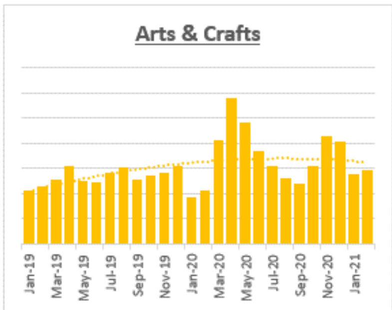



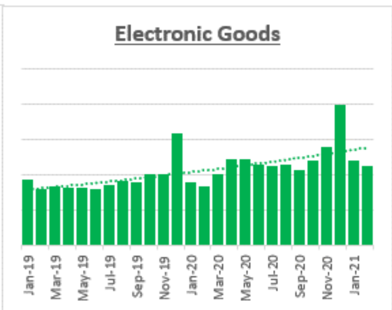




Many of the smaller categories, although not a huge percentage of turnover, have also done particularly well. Alternative Smoking is the most striking of these categories.







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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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