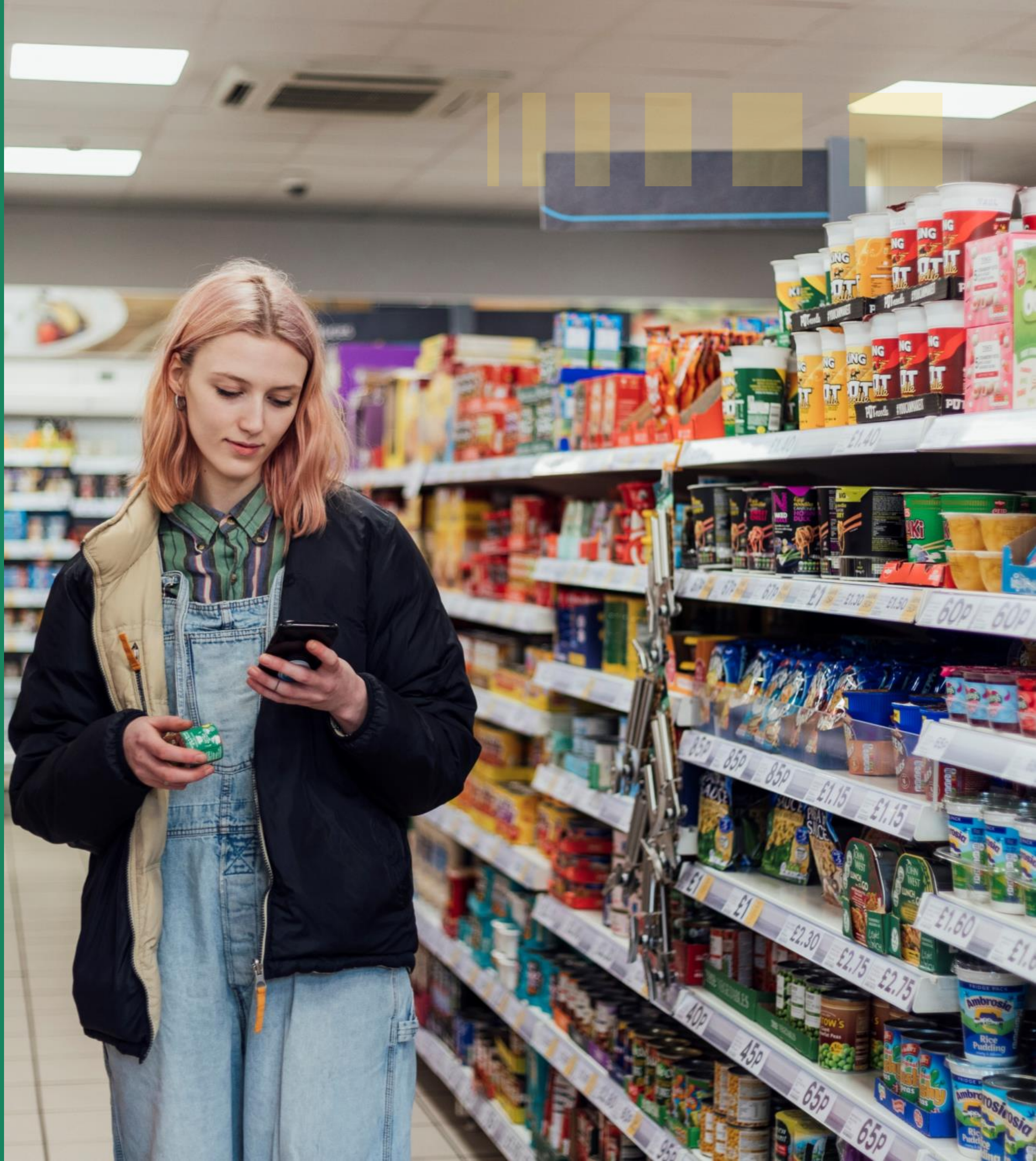
Lumina Intelligence

Channel Spotlight: UK Convenience Market – Q1 2025



Managing expenses remains key to shoppers and convenient products see a boost

Frequency of trips and basket size increased after the festive period, driven by an increase in Soft Drinks especially in the month of March. Shoppers opted to visit the shops more often and spent less, especially amongst younger shoppers.

Planned top-up missions increased in share (+4.2ppts). Tinned and packaged food were key within this – cooking/pasta/curry sauces and dry pasta & rice especially - with shoppers trying to manage their expenses after the festivities.

Impulse shopping fell across the board but primarily in Symbols & Independents. Shoppers who live with their partner and children were the key drivers of this decline in Symbols and Independents (-2.3ppts), as they are the most budget-conscious shopper and most likely to plan their shop to manage expenses.

Source: Lumina Intelligence, April 2025

Frequency of trips and footfall increased as shoppers took advantage of sunnier days

Individual ice cream or lolly
+0.4ppts occasions share
4we 2 Mar to 4we 30 Mar

Tub of ice cream
+0.5ppts occasions share
4we 2 Mar to 4we 30 Mar

Convenience key measures – rolling 4we periods in Q1 2025

	4we 02.02.25	4we 02.03.25	4we 30.03.25
Penetration	75.7%	76.6%	77.1%
Average Frequency	2.2	2.3	2.3
Average Spend (£)	£8.42	£8.38	£8.11
Basket Size	2.8	2.8	2.7

Source: Lumina Intelligence Convenience Tracking Programme, data collected Q1 2025

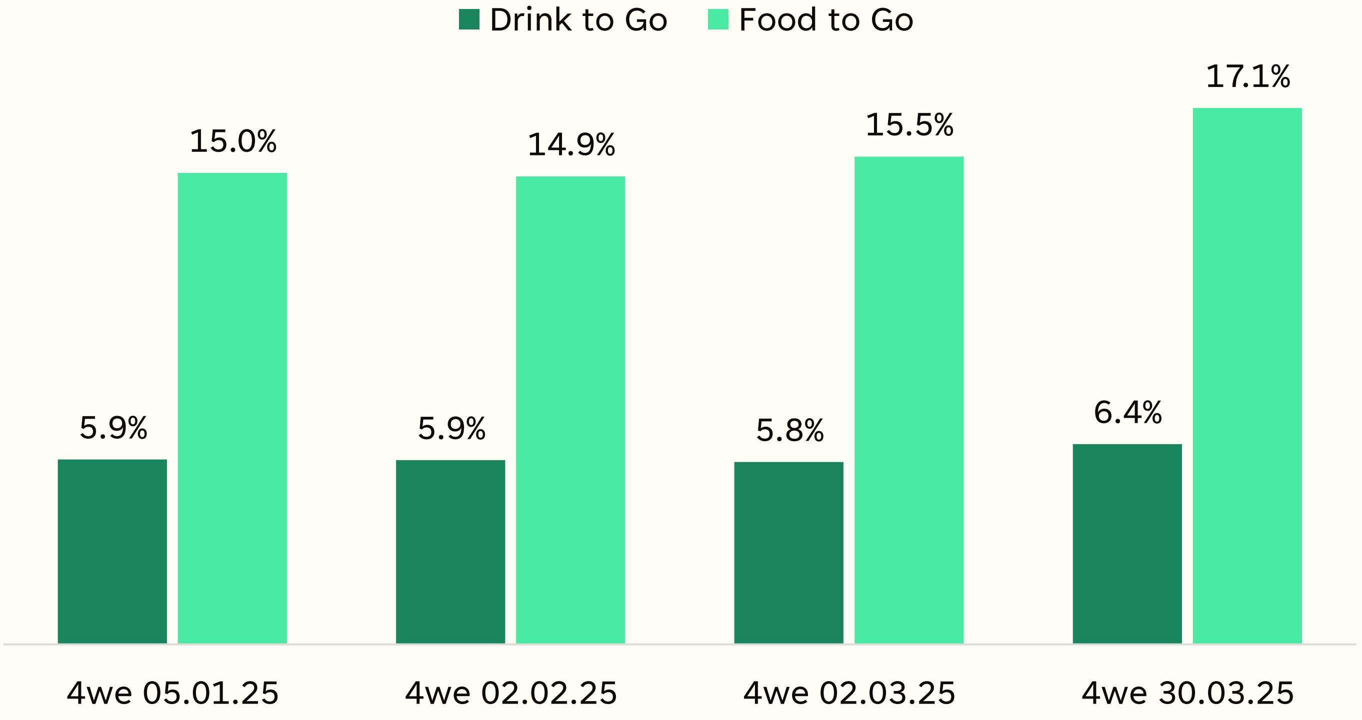
Good weather influenced shoppers' behaviour

Shoppers took advantage of the sunniest March since 1910, with "Food and Drink to Go" up period on period and compared to last year (+2.8ppt and +1.5ppts respectively). Growth in Chilled Foods (+2.4ppts) and Soft Drinks (+18ppts) were the key drivers of yearly growth.

Fresh Fruit
+2ppts share
Q1 2024 vs Q1 2025

Energy Drinks
+9ppts share
Q1 2024 vs Q1 2025

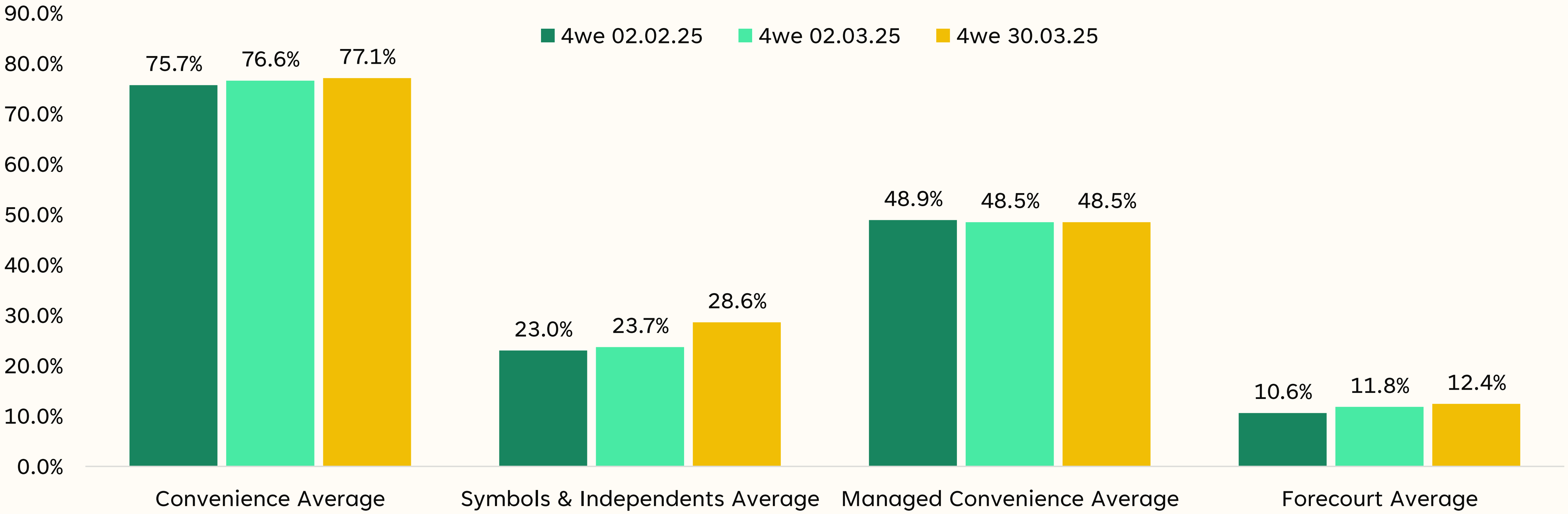
Convenience Mission share of occasions – rolling 4we periods in Q1 2025



Sources: Lumina Intelligence Convenience Tracking Programme, data collected in Q1 2024 vs Q1 2025

Symbols & Independents increased footfall, particularly in the month of March, driven by Chilled and Frozen foods

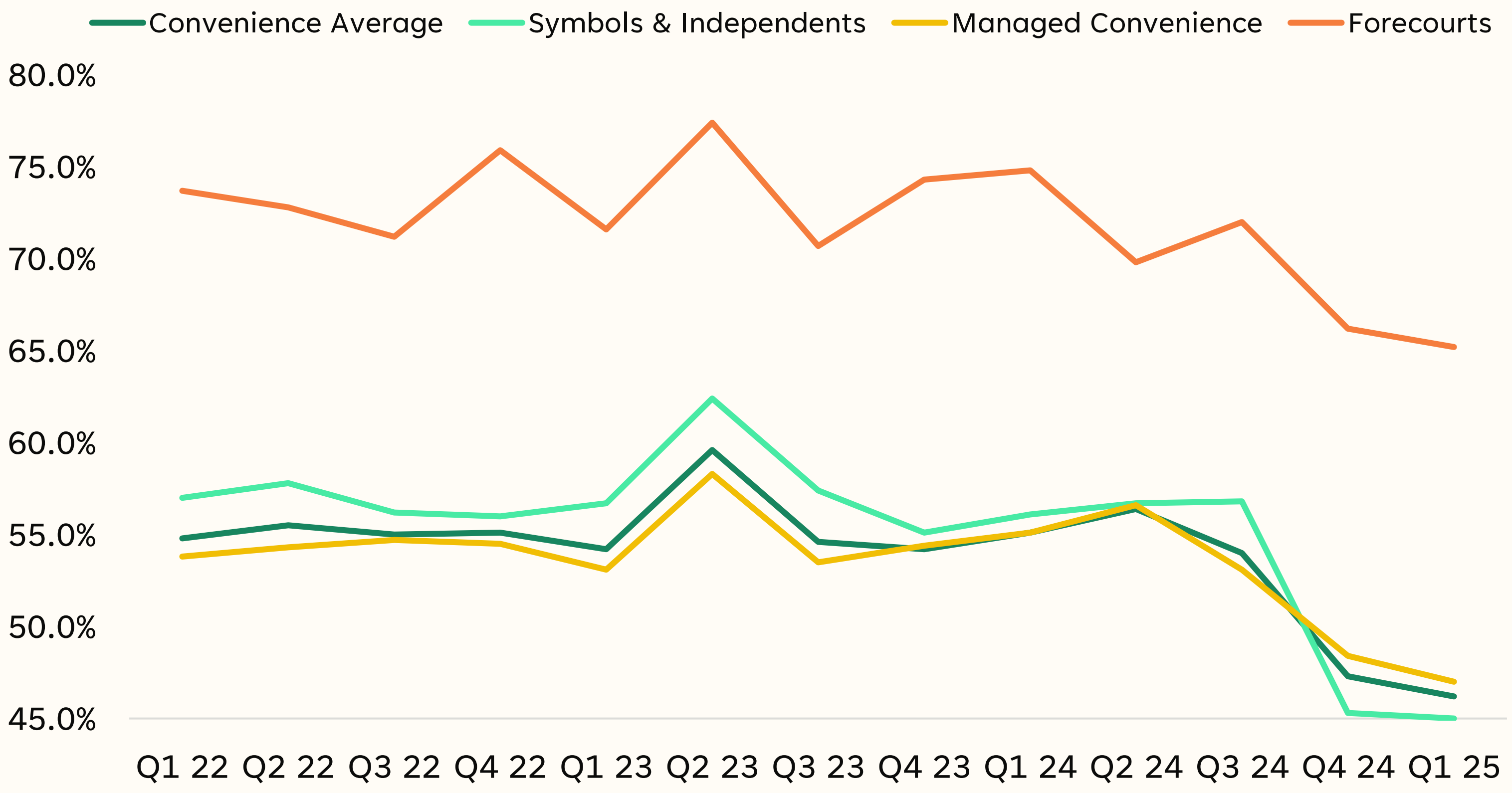
Penetration – convenience sub-channels



Source: Lumina Intelligence Convenience Tracking Programme, data collected during Q1 2025

Impulse continues to see a downturn this period, mainly driven by shoppers who live with their partner and children as they are the most budget-conscious

% of convenience shoppers purchasing on impulse

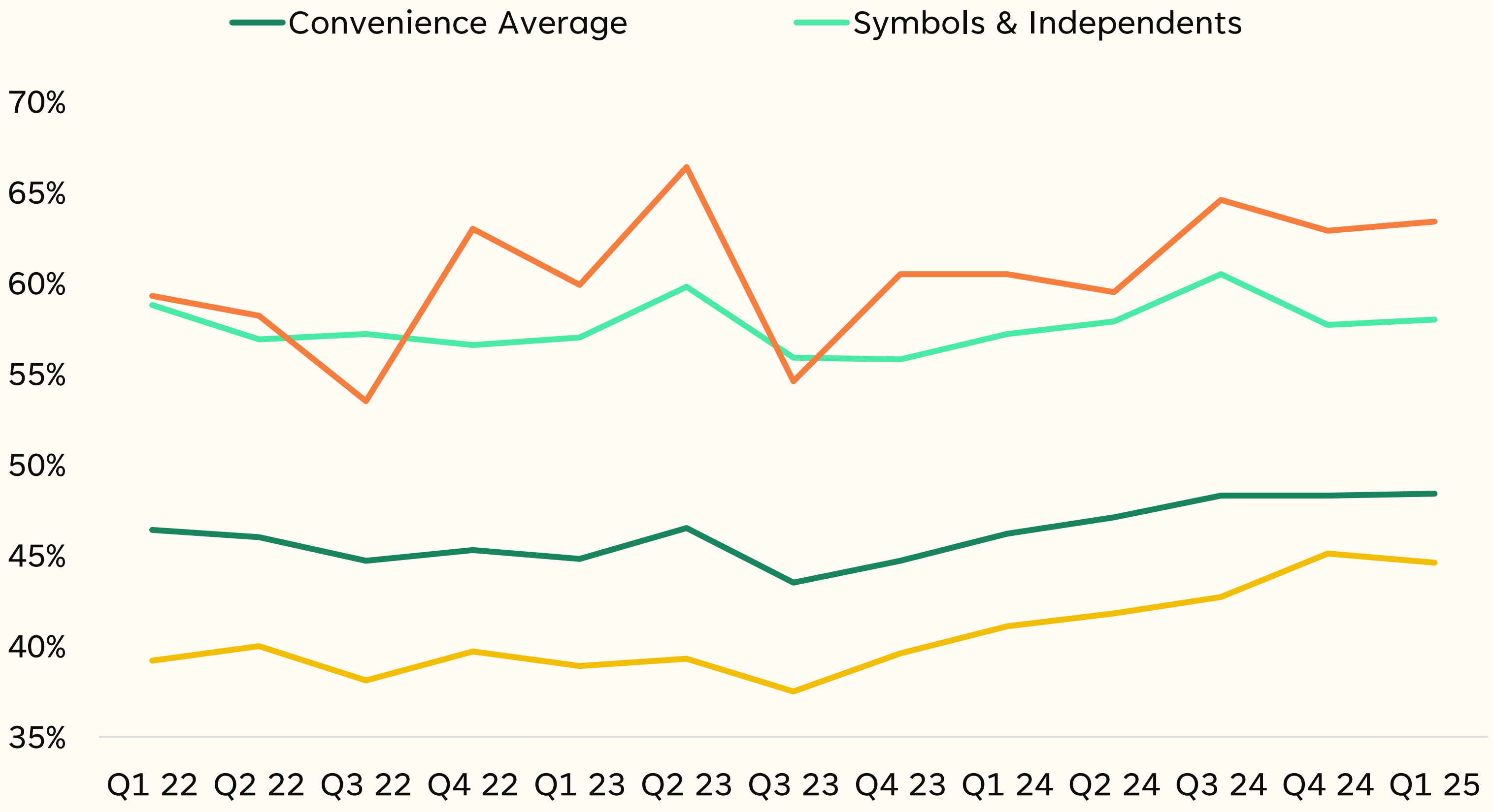


Q1 2025 ppt change YoY	-8.9ppts	-11.1ppts	-8.1ppts	-9.6ppts

Source: Lumina Intelligence Convenience Tracking Programme, data collected Q1 2022 to Q1 2025

Purchasing PMP has sustained growth across all sub-channels, but growth has been especially prevalent in managed convenience

% of convenience shoppers purchasing price-marked packs (PMPs)



Q1 2025 ppt change YoY	+2.2ppts	+0.8ppts	+3.5ppts	+2.9ppts

Source: Lumina Intelligence Convenience Tracking Programme, data collected Q1 2022 to Q1 2024

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Explore Lumina Intelligence’s Convenience Tracking Programme

The Convenience Tracking Programme gives your insight, category, and sales teams direct access to granular shopper data across all convenience categories.

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