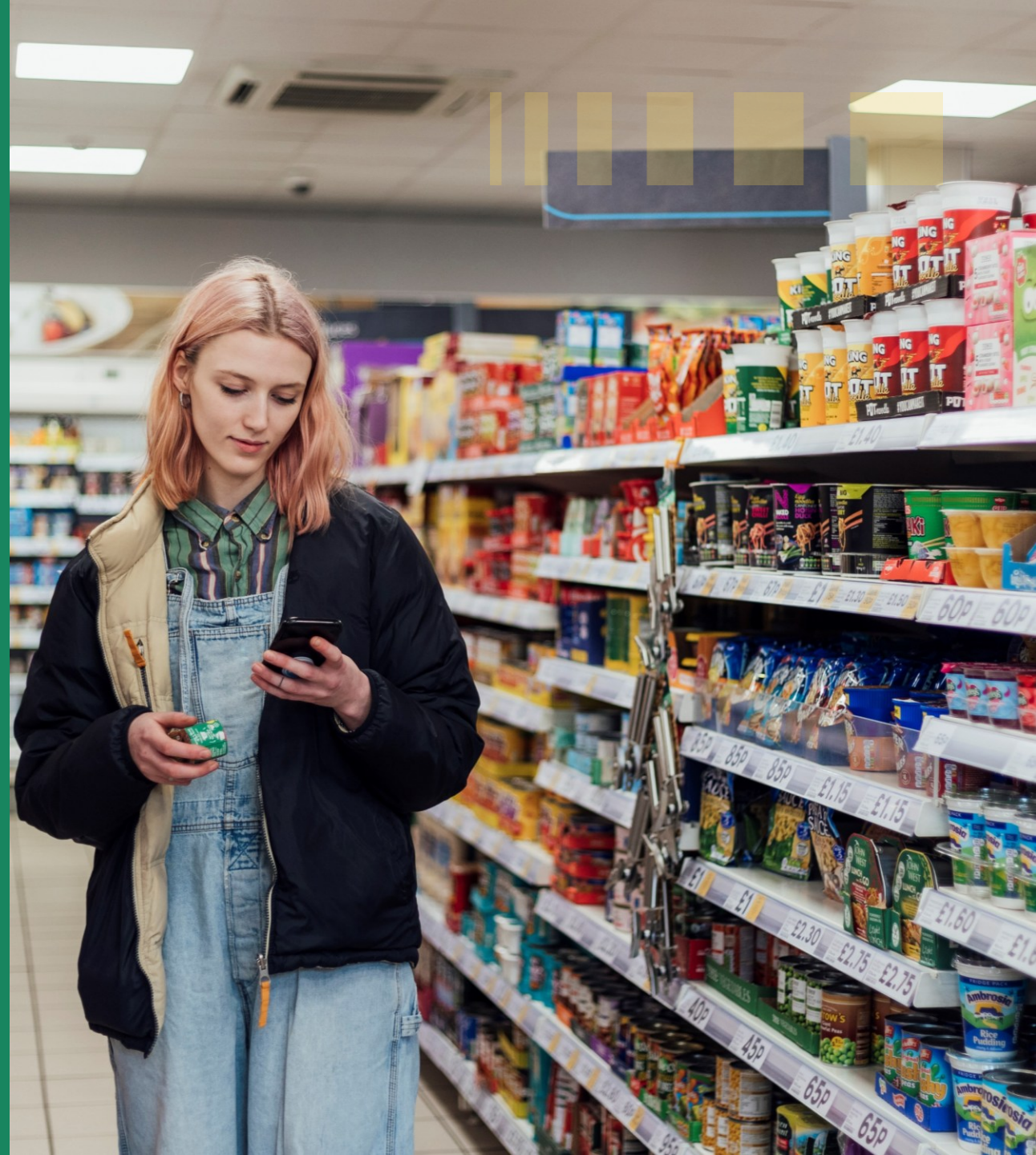


Channel Spotlight: UK Convenience Market – Q1 2026



Post-festive shopping drives a more deliberate convenience shopper, shaped by value discipline

Penetration remained resilient through Q1, but average spend softened towards the end of the quarter as shoppers became more mindful post-festivities. Trips remained frequent yet older and value-seeking shoppers increasingly constrained baskets, prioritising control over discretionary spend.

Shoppers increasingly blended immediate consumption with planned in-home needs, underpinning strength in food-to-go and soft drinks. Event-led missions such as Mother's Day supported treat spend, while Symbols & Independents benefited from a shift towards in-store missions over delivery to manage costs.

Impulse purchasing, promotional uptake and PMP participation all declined year-on-year, reflecting a more deliberate approach to convenience shopping. Retailers responded by leaning into event-based merchandising, front-of-store theatre and value messaging, targeting considered trade-up rather than spontaneous add-on behaviour.



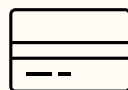
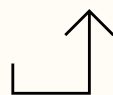
Source: Lumina Intelligence, April 2026



Penetration holds firm through Q1, but spend softens as shoppers tighten budgets, especially older shoppers



Routine Retirees
-7.9% average spend
 Q1 2025 vs Q1 2026



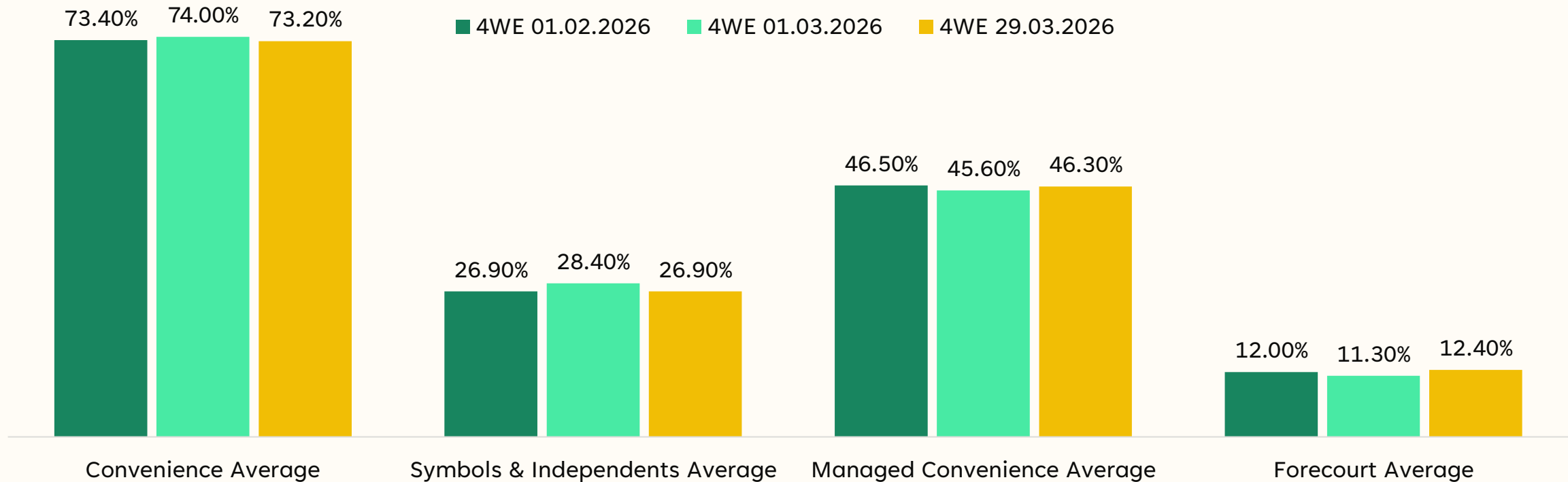
Convenience key measures – rolling 4we periods in Q1 2026

	4we 01/02/2026	4we 01/03/2026	4we 29/03/2026
Penetration	73.4%	74.0%	73.2%
Average Frequency	2.3	2.3	2.3
Average Spend (£)	£8.05	£8.15	£7.83
Basket Size	2.6	2.7	2.6

Source: Lumina Intelligence Convenience Tracking Programme, data collected Q1 2026

Post-festive spending reset drives a Q1 dip in penetration and impulse behaviour

Penetration – convenience sub-channels

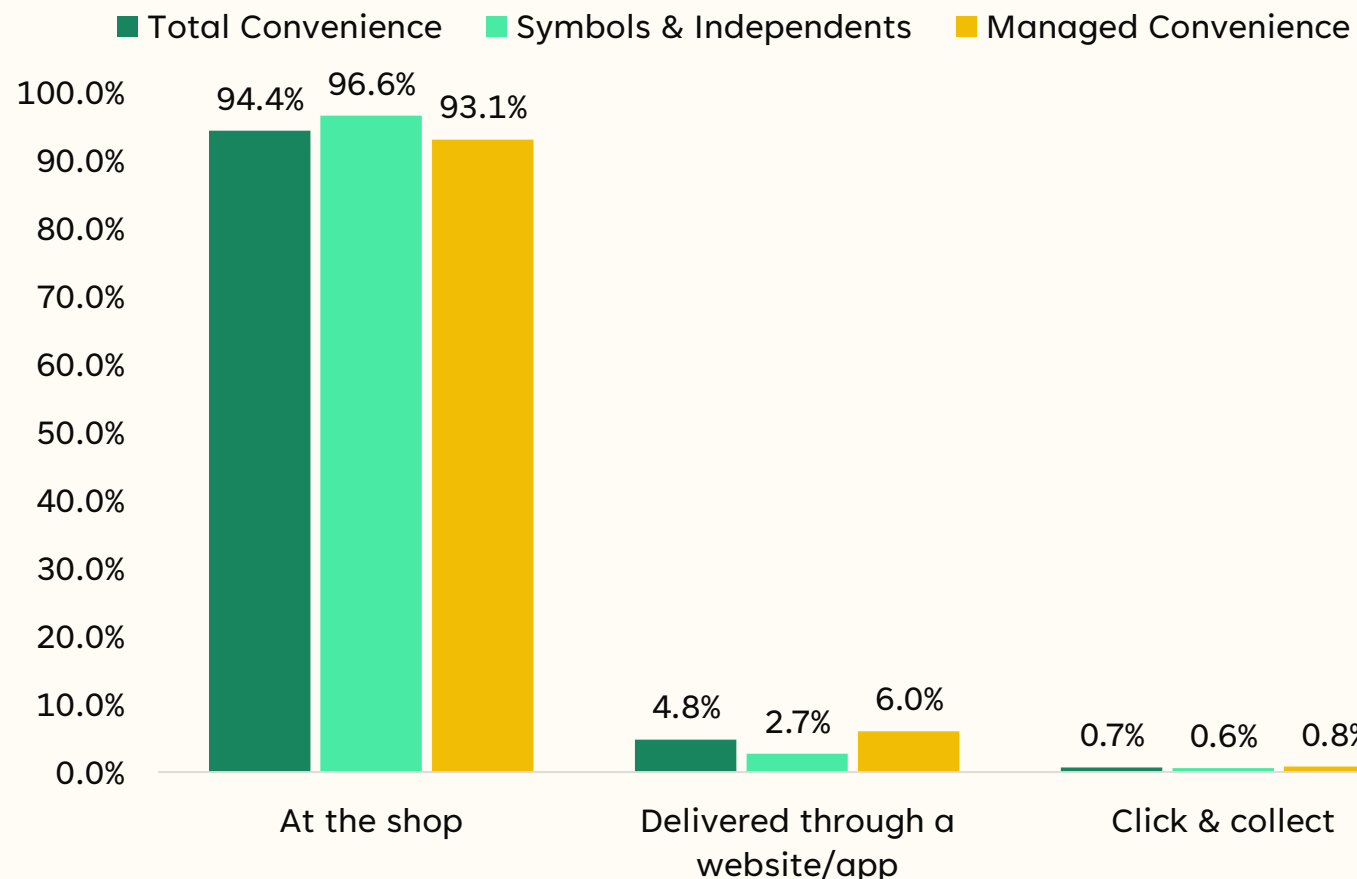


Source: Lumina Intelligence Convenience Tracking Programme, data collected during Q1 2026



Method of purchasing share of occasions, Q1 2026

Value-conscious shoppers favour in-store purchases to avoid delivery costs, reinforcing Symbols & Indies' strength in Q1



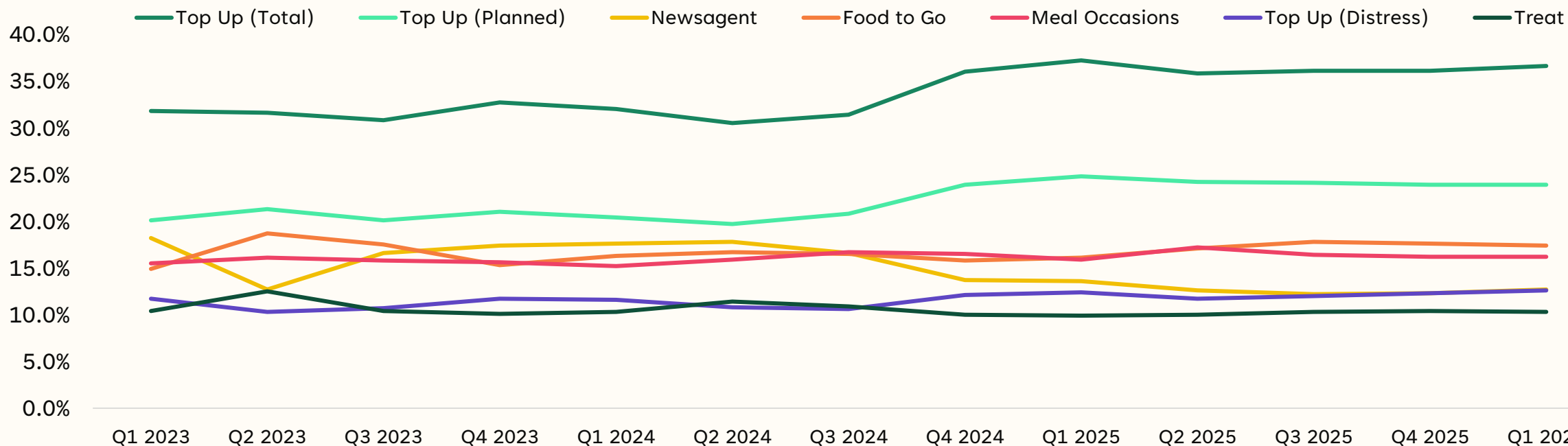
Source: Lumina Intelligence Convenience Tracking Programme, data collected Q1 2026

Food-to-go holds firm as pre-family shoppers resist January tightening and remain less price sensitive



Convenience Average: Top 7 Missions share of occasions, Q1 2023 – Q1 2026

Urban, treat hunters
Cluster share within food-to-go
+5.3ppts year-on-year

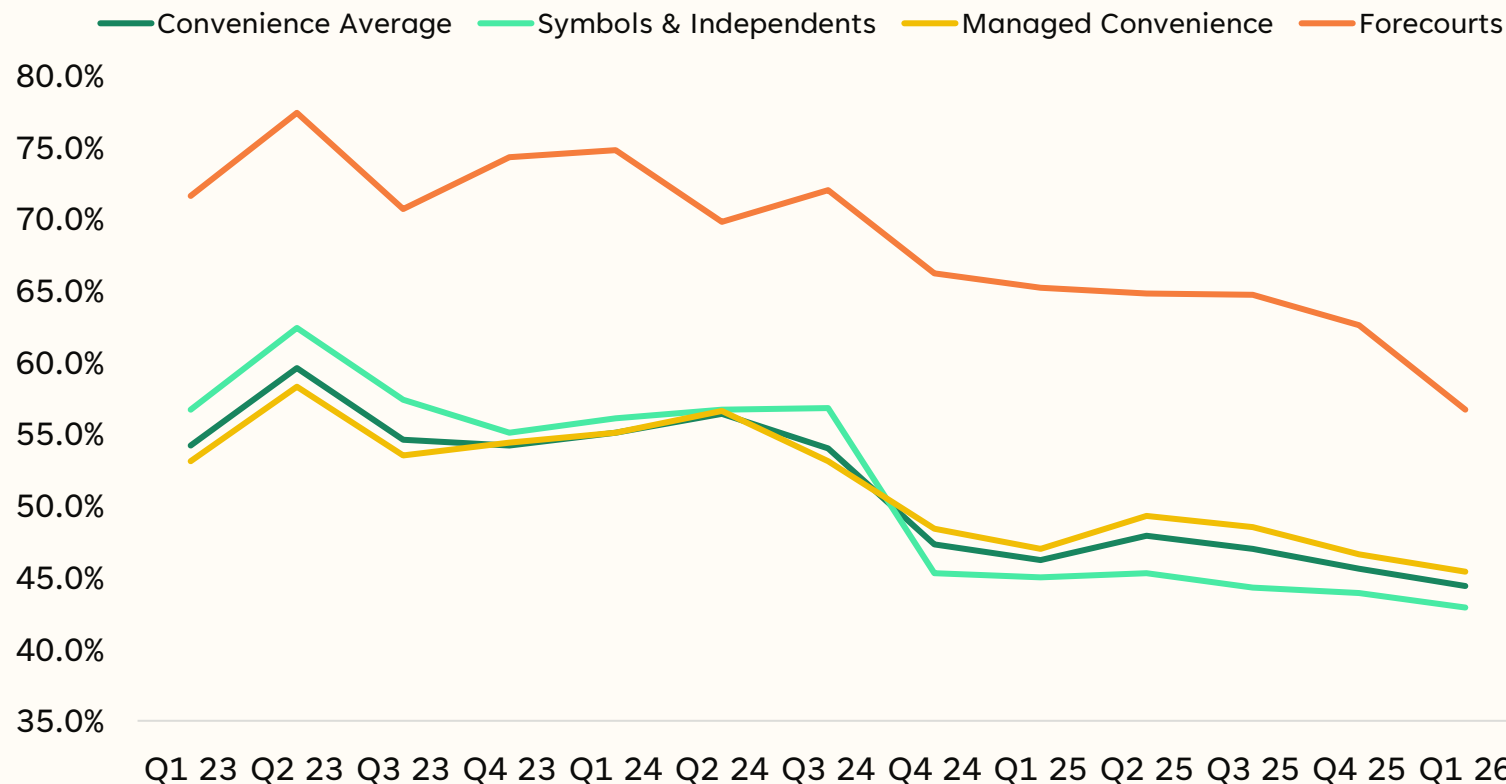


Source: Lumina Intelligence Convenience Tracking Programme, data collected Q1 2023 to Q1 2026



% of convenience shoppers purchasing on impulse

Impulse continues to decline across convenience, as shoppers are more mindful of expenses



Q1 2026 ppt change YoY	Convenience Average	Symbols & Independents	Managed Convenience	Forecourts
	-1.9ppts	-2.1ppts	-1.6ppts	-8.5ppts

Source: Lumina Intelligence Convenience Tracking Programme, data collected Q1 2023 to Q1 2026

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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