

COVID-19 – Retail and E-commerce: A Year On – UK – April 2021

Report Price: £2195 | \$2995 | €2600

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This report looks at the following areas:

- The impact of COVID- on retail sales, including forecasts for online, grocery, non-food, fashion and household goods stores.
- The impact of COVID-19 on macro-economic factors, including consumer confidence and household finances.
- The impact of COVID-19 on consumer behaviour, including spending priorities, lifestyles and future behaviour.
- The impact of COVID-19 to-date on shopping behaviour.
- The legacy impact of COVID-19 on shopping behaviour, including channel use and future intentions.
- What consumers want from stores moving forward.

The COVID-19 pandemic meant that 2020 was a unique year in the retail sector for a number of reasons but in particular, it forced consumers to shop in new ways. The positive for stores is that 60% of consumers have missed shopping as a day out. With stores reopening, retail has cleared the first hurdle to more 'normal' trading, but with 42% of consumers saying that closures of pubs/restaurants/cafes has discouraged them from visiting shopping areas, it will not be until all consumer facing businesses are back that we will see what footfall truly looks like post-peak pandemic.

The biggest impact of COVID-19 to date has been the greater reliance placed on online shopping. All online sales grew by 46.9% to £110.9 billion in 2020, taking a record 27.5% of all retail sales. 44% of consumers have shopped more from retailer websites because of the pandemic, and the pandemic has accelerated emerging trends – such as social media shopping which 15% of consumers have done more of as a result of the pandemic. With 27% of consumers expecting to do more online shopping post-peak of the pandemic compared to pre-pandemic, this extended period of online use will lead to a legacy of greater online penetration throughout the retail sector moving forward.



“The COVID-19 pandemic has been a seismic event in the history of modern UK retail. Overnight, consumer behaviour shifted and retailers of all sizes were forced to react to the new environment the pandemic had brought. Some excelled in this new environment, while for some it meant the end of the road.”

– Nick Carroll, Associate Director of Retail Research

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If online was the 'winner' of the pandemic, in-store trade, and in particular non-food in-store trade, has lost out. Non-food store sales declined by a record 10.6% in 2020, and when online contributions are taken out, in-store non-food sales declined by an estimated 24.3%. Some categories, particularly fashion, were hit harder than others but such a hit naturally meant some big-name businesses failed and we expect that it will take until at least 2023 for the sector to recover to pre-pandemic levels.

The pandemic also forced shopping behaviours to become more local, with a fifth (21%) of consumers shopping more in-store in their local area and 46% shopping less outside of their local area because of the pandemic. With changes to working habits and continued consumer caution there remain significant opportunities in more localised purchasing moving forward – particularly within the smaller/chain and independent sector which 28% of consumers say they will shop from more post-peak of the pandemic compared to before the pandemic.

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The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 121: All non-store retail sales, scenario forecast, 2020-25

- **All online retail sales**

Figure 122: All online retail sales, scenario forecast, 2020-25

- **All fashion stores retail sales**

Figure 123: All fashion stores retail sales, scenario forecast, 2020-25

- **All household goods retail sales**

Figure 124: All household goods retail sales, scenario forecast, 2020-25

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