

Supermarkets: Inc Impact of COVID-19 - UK - November 2020

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This report looks at the following areas:

- The impact of COVID-19 on grocery shopping behaviour and the impact on channel usage.
- How consumers shop and how frequently for groceries.
- Retailers used, both in a primary and secondary role.
- Satisfaction levels with and perceptions of the leading grocery retailers.
- Attitudes to the role of grocery retailers in communities and support for local producers.

In a period where basket sizes have grown and frequency of shop has fallen, it would be logical to assume that the physical shopping format which best serves big-basket demand, supermarkets, will have seen a significant uptick in sales. However whilst the supermarket sector has seen its strongest growth (+4.3%) in almost a decade, this growth figure lags that of the overall grocery market (+7.6%) and means that large-format grocery stores have once more lost share of all grocery sales – falling to under half (47.5%) for the first time.

Whilst COVID-19 has seen shoppers do fewer 'top-up' shops, a key driver away from larger-format stores in the past decade, this has been replaced by two key trends which have served to limit supermarket sales: more local shopping and online growth. With consumers naturally more confined to their immediate area we have seen localised shopping tick-up, on average 25% have shopped more with local businesses since the pandemic hit, and with many large-format stores in out or edge of town locations this has served to limit demand. However, it is the rapid growth in online sales, which we estimate will grow 72% in 2020, which have served to most limit store-based supermarket sales, with online a channel that also excels in serving big-basket demand.

The longer-term threat to supermarkets is that these purchasing patterns become further engrained. We are expecting online sales to dial back a little once the peak of the pandemic has passed but equally we are expecting a legacy boost to the channel – and this will mean more big-baskets are fulfilled



“COVID-19 will bring a record year for the grocery sector in terms of sales and 2020 will also be the year to mark a rebalancing of the sector. A legacy boost to online will naturally take more demand away from large-format stores and will mean a further rethink about how super and hypermarkets in the UK are utilised by the leading grocery retailers.”

– Nick Carroll, Associate Director, Retail Research

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away from larger-format stores. The financial pressures being placed on grocery retailers has also served to see many look to move away from counter-based grocery services, and fill more space with concessionary partnerships. Whilst the latter serves to boost the appeal of large-format stores through 'multi-mission' shops, the latter has the potential to remove one of the USPs of large-format stores in the food and drink sector.

However, there are opportunities for supermarkets moving forward. They will remain the dominant channel and we expect the share of sales moving away from large-format stores to ease. Longer-term working at home practices may give a boost to basket sizes and when concerns around store visits ease, this may allow more opportunities for supermarkets to tap into this. However, to fully capitalise on this, the large-format store must represent the best version of store-based shopping, and this means more experiential and retail-based theatre in-store and a celebration of food and drink. If customers are to be convinced to make the trip to often 'out of the way' stores, there must be reasons and experiences there that cannot be replicated elsewhere for them to do so.

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Table of Contents

OVERVIEW

- **Key issues covered in this Report**
- **COVID-19: Market Context**
- **Impact of the January lockdown and the vaccination rollout**
- **Economic and other assumptions**
- **Products covered in this Report**

EXECUTIVE SUMMARY

- **Impact of COVID-19 on grocery retail sales**
Figure 1: Short-, medium- and long-term impact of COVID-19 on all retail and grocery retail sales, December 2020
- **The market**
- **Spending on in-home food and drink soars as a result of COVID-19**
Figure 2: Consumer spending on and growth in core in-home food and drink categories, Q1 2019-Q2 2020
- **Grocery retail sales hit record high, although hit to non-foods depresses growth**
Figure 3: All grocery retail sales (including VAT), 2015-25 (17 November 2020)
- **Online to claim over 10% of spending for the first time**
Figure 4: Estimated breakdown of all grocery retail sales, by channel, 2011-20
- **Leading Retailers**
- **The big four still account for two thirds of all sales**
Figure 5: Leading grocery retailers: share of all grocery retail sales, 2019
- **Online sales to near double in 2020**
Figure 6: Online Grocery market size (including VAT), 2015-20
- **Underlying trends remain key**
Figure 7: Asda Sustainability store, Middleton October 2020
- **Amazon's innovation differentiates it, but Tesco outperforms on trust**
Figure 8: Attitudes towards and usage of selected brands, November 2020
- **The consumer**
- **COVID-19 drives bigger baskets... and less frequent shops**
Figure 9: How grocery shoppers typically shop, 2015-20
- **...and less frequent shops**
Figure 10: Frequency of grocery shop, 2018 and 2020
- **Despite bigger baskets, the shift of spending away from larger-format stores continues**

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Report Price: £2195 | \$2995 | €2600

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

Figure 11: Store format where the most is spent in a typical month, 2016-20

- **Tesco is the most popular retailer**

Figure 12: Grocery retailers used for primary and secondary shops, August 2020

- **Overall satisfaction levels are high, but more clarity on sourcing is key**

Figure 13: Key drivers of overall satisfaction with supermarkets, September 2020

- **Goodwill towards retailers is high, but will be lost if not invested in**

Figure 14: Attitudes towards grocery shopping, August 2020

ISSUES AND INSIGHTS

- **COVID-19 Reset: Defining the food and drink offer in supermarkets**
- **COVID-19 Reset: Driving the multi-mission benefits**

THE MARKET – KEY TAKEAWAYS

- **COVID-19 drives confidence down and sees consumers cut back**
- **Spending on in-home food and drink soars as a result of COVID-19**
- **Online to claim over 10% of spending for the first time**

MARKET DRIVERS

- **Confidence dives with onset of COVID-19 and remains volatile**

Figure 15: Financial confidence index, January 2015–November 2020

- **COVID-19 polarises finances**

Figure 16: Current financial situation compared to a year ago, by household income, November 2020

- **Wages take a pounding after COVID-19 triggers economic downturn**

Figure 17: Average weekly earnings, by consumer price index, January 2017–September 2019

- **Retail sales drop sharply during COVID-19 lockdown**

Figure 18: Monthly UK retail sales (excluding fuel), by value, January 2017–October 2020

- **Food and drink prices fell in wake of relaxation of first COVID-19 lockdown restrictions...**

Figure 19: Food and drink inflation, October 2019–October 2020

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Interactive Databook

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- **...however a tick up in the first half of the year is expected**

Figure 20: Origins of food consumed in the UK, 2019

Figure 21: UK trade, value of import and export by food groups, 2019

Figure 22: food and drink, percentage of total imports accounted for by the EU, 2015-20 (Oct)

- **Home ownership is rising and renting is falling**

Figure 23: UK household tenure status, 2014-19

CONSUMER SPENDING ON FOOD AND DRINK

- **Growth slows in 2019 but COVID-19 will bring a record year for spending on food and drink**

Figure 24: Consumer spending on and growth in core in-home food and drink categories, Q1 2019-Q2 2020

Figure 25: Consumer spending on core in-home food and drink categories, 2015-20

- **Spending on food to top £100 billion for the first time**

Figure 26: Annual % change in consumer spending, value and volume, and inflation in food, 2014-20

Figure 27: Breakdown of consumer spending on food, 2019

- **In-home consumption major boost to tea and coffee**

Figure 28: Annual % change in consumer spending, value and volume, and inflation in non-alcoholic drinks, 2014-20

- **In-home alcohol sales get big boost from COVID-19**

Figure 29: Annual % change in consumer spending, value and volume, and inflation on alcoholic drinks, 2014-20

Figure 30: Breakdown of value spending in the alcoholic drinks category, 2019

SECTOR SIZE AND FORECAST

- **Greater in-home demand boosts basket sizes and grocery sales**

Figure 31: Short-, medium- and long-term impact of COVID-19 on all retail and grocery retail sales, December 2020

- **Growth to reach record high in 2020**

Figure 32: All grocery retail sales (including VAT), 2015-25

Figure 33: All grocery retail sales (including VAT), 2015-25

- **Supermarkets see strong growth, but growth in online holds back store-based sales**

Figure 34: Supermarket market size and forecast (including VAT), 2015-25

What's included

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Full Report PDF

Infographic Overview

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Figure 35: Supermarket market size and forecast (including VAT), 2015-25

- **Market drivers and assumptions**

Figure 36: Key drivers affecting Mintel's market forecast, 2015-25

- **Learnings from the last recession**

Figure 37: Annual % change in all grocery retail sales (excluding VAT), and by broad category, 2007-12

- **Forecast methodology**

CHANNELS OF DISTRIBUTION

- **Supermarkets still the largest channel within the grocery sector...**

Figure 38: Estimated channels of distribution for grocery retail sales, 2019

- **...however share of spending is likely to fall below 50% for the first time**

Figure 39: Estimated breakdown of all grocery retail sales, by channel, 2011-20

THE CONSUMER – KEY TAKEAWAYS

- **COVID-19 drives up basket sizes as consumers reduce frequency of shop**
- **Bigger basket shopping not necessarily to the benefit of supermarkets**
- **Appreciation of the grocery sector at a high**

HOW THEY SHOP

- **There remains a gender imbalance in the responsibility for grocery shopping**

Figure 40: Responsibility for grocery shopping, August 2020

- **COVID-19 helps to bring bigger basket shops back in vogue**

Figure 41: How grocery shoppers typically shop, 2015-20

- **There is fluidity in these habits**

Figure 42: How grocery shoppers typically shop, by quarter, Mar-2016, Sep-2020

- **COVID-19 hits frequency of shop**

Figure 43: Frequency of grocery shop, 2018 and 2020

TYPES OF STORE USED

- **Despite bigger baskets, the shift of spending away from larger-format stores continues**

Figure 44: Store format where the most is spent in a typical month, 2016-20

What's included

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Full Report PDF

Infographic Overview

Powerpoint Presentation

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Figure 45: Mintel Grocery Tracker: Format where the most is spent in a typical month, Mar-Sep 2020

- **Older shoppers spend the most in supermarkets, but are increasingly shifting spend to other channels**

Figure 46: Store format where the most is spent in a typical month, by age, August 2020

- **Significant shift in both lower and higher income households' spend to online and discounters**

Figure 47: Store format where the most is spent in a typical month, by household income, August 2020

RETAILERS SHOPPED WITH

- **Tesco remains top of the pack**

Figure 48: Grocery retailers used, August 2020

- **Tesco has been losing shoppers for the last three years**

Figure 49: Trend of grocery retailers used, 2018-20

- **Morrisons most likely to be used for a top-up shop over a main shop**

Figure 50: Grocery retailers used for primary and secondary shops, August 2020

- **Just 7% of shoppers stick to one retailer**

Figure 51: Repertoire of secondary retailers used, August 2020

- **Nearly 50% of Lidl shoppers are topping up at Tesco**

Figure 52: Where leading retailers' primary shoppers also shop, August 2020

RETAILER DEMOGRAPHIC COMPARISON

- **Tesco gains more 16-24 year old primary and secondary shoppers**

Figure 53: Leading grocery retailers used for primary and secondary shops, by age, August 2020

- **Aldi still skews towards younger customers**

Figure 54: The discounters: primary and secondary shoppers, by age, August 2020

- **Tesco's convenience store estate creates strong secondary usage**

Figure 55: Leading grocery retailers used for primary and secondary shops, by location, August 2020

- **Lidl pulls ahead of Aldi in London**

Figure 56: Leading retailers' primary shoppers, by region, August 2020

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Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

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Figure 57: Leading retailers' secondary shoppers, by region, August 2020

- **Big four supermarkets attracting the same demographics**

Figure 58: Leading grocery retailers used for primary and secondary shops, by household income bracket, August 2020

- **Aldi appealing to higher income households for top-up shops**

Figure 59: Aldi and Lidl, primary and secondary grocery shoppers, by household income bracket, August 2020

SATISFACTION WITH THE SHOPPING EXPERIENCE

- **Most are satisfied with the COVID-19 measures put in place**

Figure 60: Satisfaction levels with the grocery retailer where the most is spent in a typical month, August 2020

- **Product sourcing information still an area that needs work**

Figure 61: Key drivers of overall satisfaction with supermarkets, September 2020

- **Satisfaction by retailer**

Figure 62: Overall satisfaction with the retailer where the most is spent in a typical month, August 2020

Figure 63: Satisfaction with the retailer where the most is spent in a typical month, by factors, September 2020

Figure 64: Satisfaction with the retailer where the most is spent in a typical month, by factors, September 2020

- **Methodology**

THE SHORT AND LONG-TERM IMPACT OF COVID-19 ON THE GROCERY SECTOR

- **Stockpiling drove initial peak demand, but longer-term points to more 'prepared-ness'**

Figure 65: COVID-19 Tracker: stockpiling and availability, Feb – Nov 2020

- **A short-term rowing back of trends which remain key longer-term**

Figure 66: COVID-19 Tracker: Attitudes to grocery shopping and COVID-19, 18-24 June 2020

- **COVID-19 may accelerate the integration of more technology in-store**

Figure 67: Use of self-scan since COVID-19, August 2020

- **Appreciation for grocery retail is at an all-time high...**

Figure 68: Attitudes towards the importance of grocery retailers, August 2020

- **...but this opportunity will be lost unless it is shown to be a two-way street**

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Infographic Overview

Powerpoint Presentation

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Figure 69: Attitudes towards local and British sourced products, August 2020

- **Value high on the agenda but customers want help to cut back**

Figure 70: Attitudes towards food waste and promotions, August 2020

- **Opportunities for own-brand in a more value conscious market**

Figure 71: Impact of COVID-19 on own-brand purchasing, by household income, October 2020

LEADING RETAILERS – KEY TAKEAWAYS

- **The big four still account for two-thirds of sales within the grocery sector**
- **COVID-19 has changed much, but the underlying trends in the sector remain**
- **COVID-19 has further blended the channels**

LEADING RETAILERS – KEY METRICS

- **Sales**
Figure 72: Leading grocery retailers, sales, 2015–19
- **Stores**
Figure 73: Leading grocery retailers: Store numbers, 2015–19
Figure 74: Leading grocery retailers: Annual sales per outlet, 2015–19
- **Sales areas and densities**
Figure 75: Leading grocery retailers: Total sales area, 2015–19
Figure 76: Leading grocery retailers: Annual sales per square metre, 2015–19
- **Operating profits and margins**
Figure 77: Leading grocery retailers: Operating profits, 2015–19
Figure 78: Leading grocery retailers: Operating margins, 2015–19

MARKET SHARE

- **Discounters continue to grow market share**
Figure 79: Leading grocery retailers: share of all grocery retail sales, 2019
- **Market concentration continues to drop**
Figure 80: Leading grocery retailers: Share of all grocery retail sales, 2015–19
- **A note on our market share**

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Full Report PDF

Infographic Overview

Powerpoint Presentation

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ONLINE

- **Online shopping is ubiquitous and here to stay**
Figure 81: Online Grocery market size (Including VAT), 2015-20
Figure 82: Estimated breakdown of all grocery retail sales, by channel, 2011-20
- **Online grocery shopping up significantly in just 4 months of 2020**
Figure 83: Products purchased in the past year, 2019-20
- **25% of consumers doing all or most of their grocery shopping online**
Figure 84: Online Grocery usage, December 2019
- **Key players in the online grocery sector**
Figure 85: Leading online grocery retailers' estimated market shares (excluding VAT), 2019

LAUNCH ACTIVITY AND INNOVATION

- **A greener way to shop for food**
Figure 86: Asda Sustainability store, Middleton October 2020
- **Taxi business launches into grocery delivery market**
- **Appointment supermarket shopping to avoid the queues**
Figure 87: Sparks Book & Shop, October 2020
- **Sainsbury's new local store concept to meet the demand for convenience shopping**
Figure 88: Sainsbury's Neighbourhood Hub, November 2020
- **...when all you want is the bare necessities**
Figure 89: Bother, November 2020
- **One-stop multi-shopping mission destination for shoppers who want to limit time in-store**
- **Pop-up supermarkets to support frontline healthcare workers during COVID-19 crisis**
- **Expanded food-to-go options and in-store pub**
- **Aldi's 'secret bargain hour' makes the low-cost food retailer even cheaper**
- **Unique on-demand grocery delivery service**

ADVERTISING AND MARKETING ACTIVITY

- **Total sector advertising up 1.7% year-on-year in 2019**
Figure 90: Recorded above-the-line, online display and direct mail total advertising expenditure by UK supermarket and online grocers, 2016-20*
- **Tesco is the biggest advertising spender for the third consecutive year**

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Executive Summary

Full Report PDF

Infographic Overview

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Figure 91: Recorded above-the-line, online display and direct mail total advertising expenditure, by leading UK supermarket and online grocers, 2016-19

- **Advertising spend increases around key seasonal events**

Figure 92: Recorded above-the-line, online display and direct mail total advertising expenditure by UK supermarket and online grocers, by month, 2018 and 2019

- **Advertising spend shifting to press, outdoor and radio**

Figure 93: Percentage media type split of recorded above-the-line, online display and direct mail total advertising expenditure by UK supermarkets and online grocers, 2016-20*

- **What we've seen so far in 2020**
- **COVID-19-themed campaigns**
- **Asda reboots iconic 'pocket tap' jingle**
- **Aldi challenges shoppers to re-evaluate their preconceptions of its quality offering**
- **Waitrose & Partners commitment to sourcing high-quality ingredients**
- **Nielsen Ad Intel coverage**

BRAND RESEARCH

- **Brand map**

Figure 94: Attitudes towards and usage of selected brands, November 2020

- **Key brand metrics**

Figure 95: Key metrics for selected brands, November 2020

- **Brand attitudes: Tesco retains most trusted retailer status**

Figure 96: Attitudes, by brand, November 2020

- **Brand personality: Sainsbury's more ethical than competitors**

Figure 97: Brand personality – macro image, November 2020

- **Amazon – cutting edge but profit focused**

Figure 98: Brand personality – micro image, November 2020

- **Brand analysis**
- **Tesco the most trusted retailer**
- **Sainsbury's considered more ethical than big four rivals**
- **Asda is better value than Morrisons and Sainsbury's**
- **Morrisons has the lowest lifetime usage of the big four retailers**
- **Aldi's experience and value ahead of rival Lidl**
- **Co-op is considered ethical by consumers**
- **Lidl considered the most basic of the retailers**
- **M&S offers an excellent experience**

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Executive Summary

Full Report PDF

Infographic Overview

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- Iceland is basic but good value
- Waitrose trust lower than many competitors
- Amazon leading the way in innovation
- Ocado exclusive and expensive

ASDA GROUP

- What we think
- Now under British ownership
- Plugging the gap in convenience grocery shopping
- One-stop multiple shopping mission destination
- Hygiene-centric shopping experience in wake of COVID-19 pandemic
- Avoiding queues during COVID-19 crisis
- Rapid online order fulfilment and 'greener' home deliveries
- Sustainability test store and 'green' price pledge
- Supporting the elderly and vulnerable during the COVID-19 crisis
- Company background
- Company performance

Figure 99: Asda Stores Ltd: Financial performance, 2015-19

Figure 100: Asda Stores Ltd: Outlet data, 2015-19

- Retail offering

MARKS & SPENCER (UK FOOD)

- What we think
- Entire range of food finally available to buy online
- Shifting to contact-free shopping with expansion of checkout-free service
- Appointment grocery shopping service to avoid COVID-19 lockdown queues
- Debunking high price myth
- Food-to-go vending machine
- Helping customers back on wasted food and reduce plastic pollution
- Helping NHS staff and the vulnerable during the COVID-19 pandemic
- Company background
- Company performance

Figure 101: Marks & Spencer (UK food): Group financial performance, 2015/16-2019/20

Figure 102: Marks & Spencer (UK Food): Food outlets, by format, 2015/16-2019/20

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

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Figure 103: Marks & Spencer (UK food): Outlet data, 2015/16-2019/20

- **Retail offering**

J SAINSBURY

- **What we think**
- **One-stop multiple mission shopping destinations**
- **Neighbourhood store expansion to meet the demand for top-up grocery shopping**
- **On-demand grocery delivery service**
- **Exploring new locations to bring food and household products to customers**
- **Accelerating roll-out of scan and go**
- **Ramping up loyalty scheme promotions amid the toughening trading conditions**
- **In-store product refill stations to cut back on the use of plastic**
- **Supporting communities and the most vulnerable during pandemic**
- **Company background**
- **Company performance**

Figure 104: J Sainsbury: Group financial performance, 2015/16-2019/20

Figure 105: J Sainsbury: Estimated Ex-VAT Retail financial breakdown, 2017/18-2020/21

Figure 106: J Sainsbury: Outlet data, 2015/16-2019/20

- **Retail offering**

SPAR INTERNATIONAL

- **What we think**
- **Expanded ecommerce operation to meet online demand**
- **Store format innovation to meet specific community needs**
- **Making in-store shopping safer, quicker and more convenient**
- **A one-person concept shop with scalable pop-up opportunities**
- **Helping customers avoid queueing for stores**
- **Reducing food waste at both store and consumer level**
- **Supporting local communities throughout the COVID-19 pandemic**
- **Company background**
- **Company performance**

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Figure 107: Spar International: Western Europe and Central & Eastern Europe retail sales, by country, 2015-19

Figure 108: Spar International: Western Europe and Central & Eastern Europe stores, by country, 2015-19

Figure 109: Spar International: Western Europe and Central & Eastern Europe retail sales area, 2015-19

- **Retail offering**

TESCO

- **What we think**
- **Boosting price competitiveness when value is uppermost in shoppers' minds**
- **Cashless store experience aimed at shoppers in a hurry**
- **On-demand grocery essentials delivery service by drones**
- **Cutting down on food and plastic waste**
- **Pop-up stores offering 24-hour access to essential grocery products**
- **Supporting struggling local producers during COVID-19 crisis**
- **Company background**
- **Company performance**

Figure 110: Tesco Plc: Group financial performance, 2015/16-2019/20

Figure 111: Tesco Plc: Outlet data, 2015/16-2019/20

- **Retail offering**

WAITROSE & PARTNERS

- **What we think**
- **Expanded delivery service to support more people shopping online**
- **Virtual shopping services to make online shopping easier for customers staying away from stores**
- **One-stop shopping convenience**
- **Making grocery shopping more affordable during these uncertain times**
- **Company background**
- **Company performance**

Figure 112: Waitrose: Group financial performance, 2015/16-2019/20

Figure 113: Waitrose: Outlet data, 2015/16-2019/20

- **Retail offering**

WM MORRISON GROUP

- **What we think**

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- **Speedier online grocery deliveries**
- **More reasons for shoppers to visit stores**
- **Slashing prices to be more competitive**
- **1,000 new local products to meet demand for more locally-produced products**
- **Saved 100 tonnes of food from going to waste**
- **Company background**
- **Company performance**

Figure 114: Wm Morrison Group: Group financial performance, 2015/16-2019/20

Figure 115: Wm Morrison Group: Outlet data, 2015/16-2019/20

- **Retail offering**

APPENDIX – DATA SOURCES, ABBREVIATIONS AND SUPPORTING INFORMATION

- **Data sources**
- **Financial definitions**
- **Abbreviations**
- **Consumer research methodology**

APPENDIX – KEY DRIVER ANALYSIS

- **Interpretation of results**

Figure 116: Overall satisfaction with supermarkets – key driver output, September 2020

Figure 117: Satisfaction with supermarkets, September 2020

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