ChannelTrack
Part of the twc group

Channel Track Launch Pack

Summer 2026

One might think there is very little headroom for growth in wholesaler supplied independent c-stores and independent foodservice outlets...

But dig beneath the surface…

TWC has already identified £2bn of easily achievable sales growth in independent outlets.

£2 billion

£1bn in independent c-stores.

£1bn in independent foodservice outlets.

And that's just for starters.

→ £1 billion

→ £1 billion

Because margins are wafer thin and resources are limited...

...wholesalers and suppliers can't afford to guess where the growth exists...or how to get it.

We need to use data, research and insight – to take away the guesswork and get investment decisions right.

TWC has spent 18 months designing a data, research and insight programme for the wholesale/RTM sector and its suppliers

Introducing

ChannelTrack

ChannelTrack will report how the convenience (small basket) and foodservice channels are performing

..to highlight which sub channels and operators are winning

…and why are they winning?

To enable the sector to grow sales (£2bn).

It's built using a combination of:

Billions of UK consumer debit and credit card transactions…*

…from 10+ million UK consumers…

…across 225,000 retail and foodservice outlets

10m+ UK consumers

225,000 outlets

It's an unrivalled pool of factual consumer spend transactions. This will tell us WHAT is being spent, where, how often….by who, and how far they have travelled.

** weighted appropriately to accommodate and reflect cash transactions too*

TWC isn’t just a data provider, but an insight provider.

We've added quantitative consumer insights on top.

We're interviewing 70,000 consumers in 2026 alone…

…to complement the debit/credit transactional spend data with robust insights on things like:

Missions/occasions, party composition, items purchases, unplanned purchases, failed purchases, drivers, need states, and so much more…..

70,000 consumer interviews in 2026

Consumer interviews are taking place **every single day** of 2026…

…to record the nation’s food & drink purchasing & consumption **in the previous 24 hours**

Short recall period for claimed behaviour

Splicing that all together (an almost impossible task)

…but we’ve achieved it.

Breaking down channel silos

Consumers use multiple outlet-types every day.

Channel Track follows consumers wherever they’re buying food & drink.

Channel Track will report the performance of **independent outlets** vs chains.

In both **retail** and **hospitality**.

A data, research and insights programme to report:

What is happening?
Where is it happening?
Why is it happening?
When is it happening?
Who by, who for?

Channel Track will cover these sub channels

10m consumers' debit and credit card transactions in these outlets.
70,000 consumer research interviews about consumers' usage of these outlets.

Hospitality

- Branded Pub Restaurants
- Casual Dining
- Coffee & Sandwich
- Delivery
- Independents & Smaller Operators
- Fastfood & Takeaway
- Pubs & Bars

Retail

- Small Basket Supermarket
- Supermarket Convenience
- Independents & Symbols

Channel Track is split into 6 modules

What is happening → What are consumers buying → Who is driving performance? → Who are the customers? → Where should we focus → Which outlets should we target

Module 1:
MARKET MONITOR
Track Channel/Sub Channel Performance & Health

Module 2:
TRANSACTION MONITOR
Quantify and Track the number of Purchasing Occasions

Module 3
GEO DEMOGRAPHICS
Who is driving channel growth?

Module 4
SIZE OF THE PRIZE
WHERE should you invest for your best ROI?

Module 5
PEN PORTRAITS
WHO is the customer?

Module 6
OUTLET LEVEL TARGETING
Bullseye Targeting! Which outlets should you target?

Module 1 – Market Monitor

Monthly Channel and Sub-Channel Performance Reporting

- Based on 10.2m consumers' card spend across 225,000 outlets in the UK.
- Retail and Hospitality.
- Weighted to accommodate cash transactions too.
- Will report chains vs independent outlets where appropriate.
- Available now!

MARKET MONITOR
Monthly channel and sub channel performance
Reporting last 52 weeks & 12 weeks
Foodservice and Retail
£7500+VAT per annum for 12 months reporting
(discounted introductory offer)

CHANNEL TRACK · TIER 1 · MARKET MONITOR

twc Harnessing data

Hospitality & QSR

March 2026 · UK Food & Drink · Size, spend & transaction direction, ATV and frequency by sector — QSR vs Hospitality.

Hospitality & QSR · 52-week

HDI · 52-WEEK · LEVEL + YOY

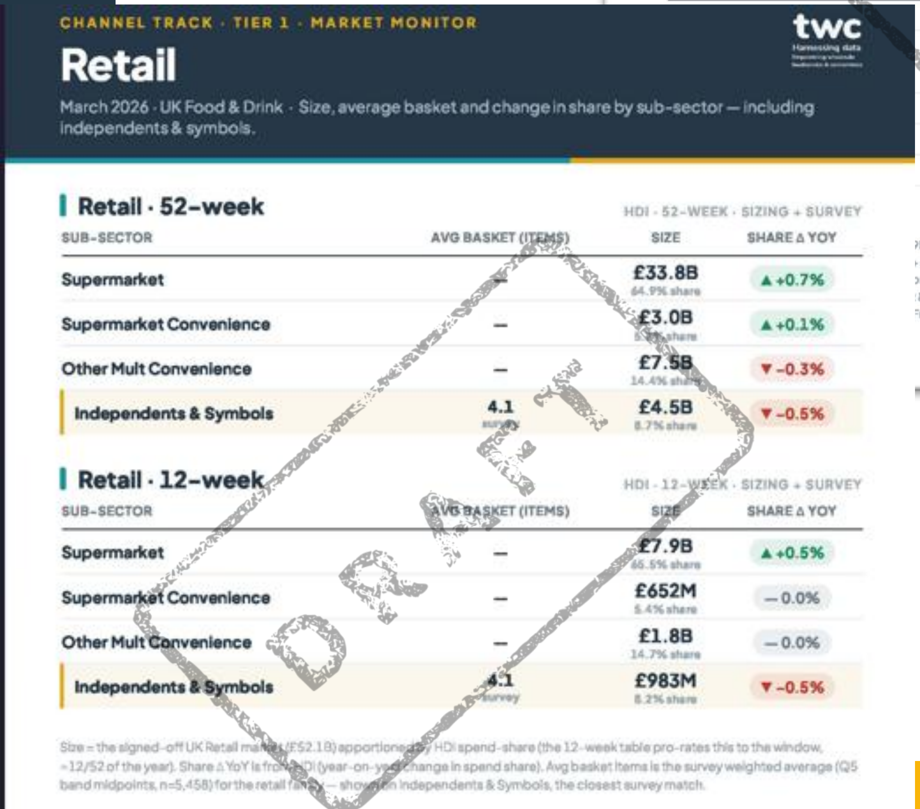
SUB-SECTOR	SIZE	SHARE	SPEND DIR.	TRANS DIR.	ATV	FREQ
Total	£94.7B	100.0%	▲ +3.1%	▲ +1.2%	£15.05 +1.8%	84.6 +2.3%
QSR	£33.0B	34.8%	▲ +5.2%	▲ +1.8%	£10.12 +3.5%	14.6 +2.9%
Fast Food	£20.0B	60.5%	▲ +5.3%	▲ +2.0%	£12.19 +3.5%	14.3 +3.3%
Coffee / Café	£13.0B	39.5%	▲ +5.0%	▲ +1.4%	£8.04 +3.6%	14.9 +2.5%
Hospitality	£61.7B	65.2%	▲ +2.3%	▲ +1.4%	£17.88 +0.9%	18.5 +2.5%
Pub Bar	£34.0B	55.1%	▲ +1.6%	▲ +0.4%	£14.83 +1.1%	21.5 +1.9%
Restaurant	£27.7B	44.9%	▲ +3.2%	▲ +2.6%	£23.92 +0.7%	12.5 +3.9%

Hospitality & QSR · 12-week

HDI · 12-WEEK · LEVEL + YOY

SUB-SECTOR	SIZE	SHARE	SPEND DIR.	TRANS DIR.	ATV	FREQ
		100.0%	▲ +2.2%	▼ -0.4%	£15.52 +2.6%	22.1 +1.8%
		34.8%	▲ +5.6%	▼ -0.6%	£10.37 +6.3%	5.0 +2.0%
		60.9%	▲ +6.3%	▼ -1.2%	£12.66 +7.6%	4.8 +1.6%
		39.1%	▲ +4.6%	▲ +0.3%	£8.09 +4.3%	5.2 +2.5%
		65.2%	▲ +1.7%	▲ +0.8%	£18.46 +0.9%	6.6 +3.0%
		54.6%	▲ +0.5%	▼ -0.5%	£15.01 +1.0%	7.9 +2.4%
		45.4%	▲ +3.1%	▲ +2.2%	£25.47 +0.9%	4.1 +4.2%

B + QSR £32.8B = £94.7B) apportioned by HDI spend-share (the 12-week table pro-rates this to the
cafés; Hospitality = pubs/bars + restaurants. Share = % of Total for the two sectors; % of sector for
r and the two sectors sum to the Total. Delivery is a separate channel in HDI but the signed-off £ already
& Hospitality pro-rata (an assumption — it likely skews to QSR; see methodology). Direction = YoY %
Frequency is per-sector unavailable (customers overlap across venues). 52-week is HDI's annual levels



CHANNEL TRACK · TIER 1 · MARKET MONITOR

twc Harnessing data

Retail

March 2026 · UK Food & Drink · Size, average basket and change in share by sub-sector — including independents & symbols.

Retail · 52-week

HDI · 52-WEEK · SIZING + SURVEY

SUB-SECTOR	AVG BASKET (ITEMS)	SIZE	SHARE Δ YOY
Supermarket	—	£33.8B 64.9% share	▲ +0.7%
Supermarket Convenience	—	£3.0B	▲ +0.1%
Other Mult Convenience	—	£7.5B 14.4% share	▼ -0.3%
Independents & Symbols	4.1 survey	£4.5B 8.7% share	▼ -0.5%

Retail · 12-week

HDI · 12-WEEK · SIZING + SURVEY

SUB-SECTOR	AVG BASKET (ITEMS)	SIZE	SHARE Δ YOY
Supermarket	—	£7.9B 65.5% share	▲ +0.5%
Supermarket Convenience	—	£652M 5.4% share	— 0.0%
Other Mult Convenience	—	£1.8B 14.7% share	— 0.0%
Independents & Symbols	4.1 survey	£983M 8.2% share	▼ -0.5%

Size = the signed-off UK Retail market (£52.1B) apportioned by HDI spend-share (the 12-week table pro-rates this to the window, ≈12/52 of the year). Share Δ YoY is from HDI (year-on-year change in spend share). Avg basket items is the survey weighted average (Q5 band midpoints, n=5,458) for the retail family — shown on Independents & Symbols, the closest survey match.

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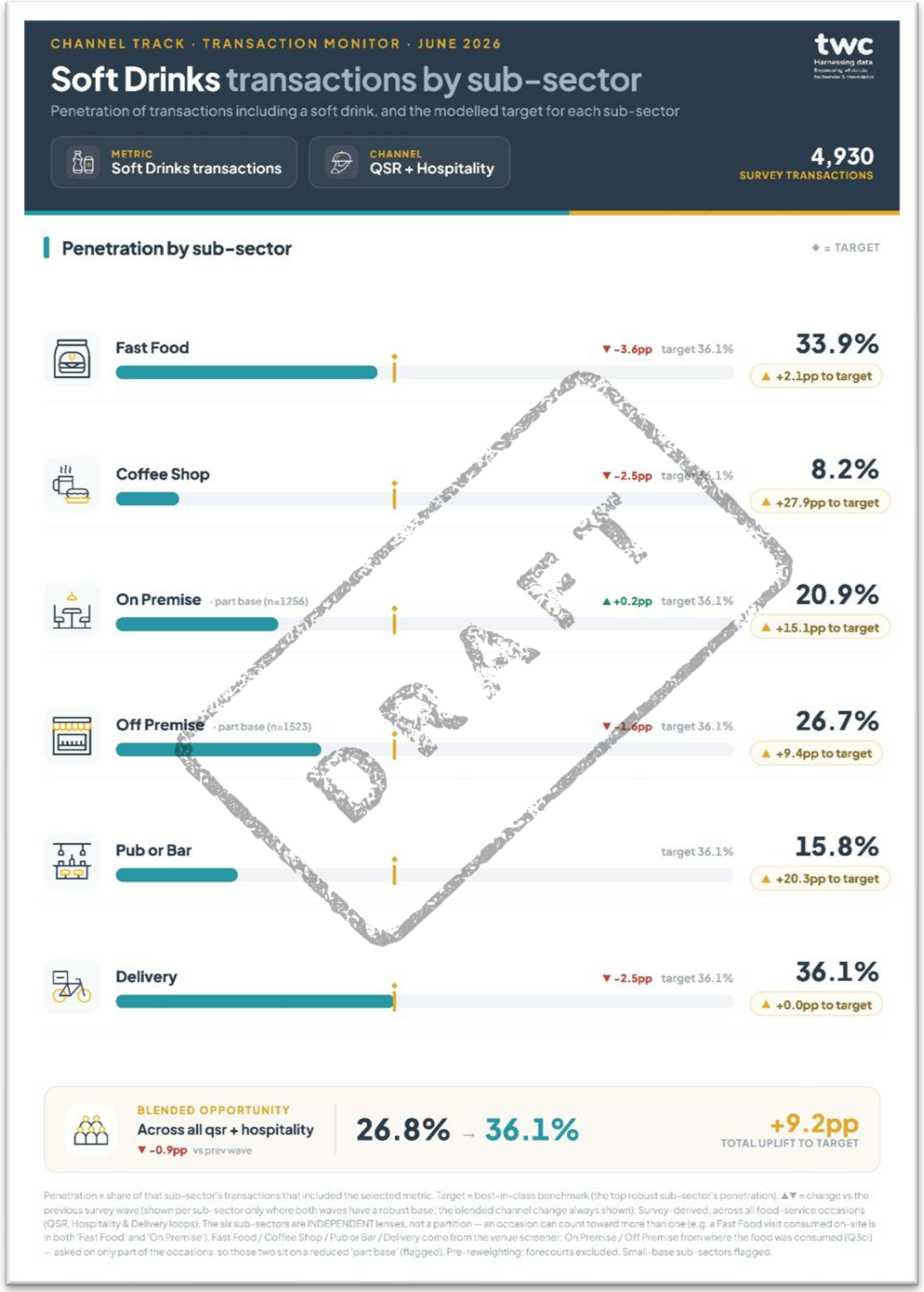
Module 2 – Transaction Monitor

Every purchase starts with a transaction. Transaction monitor reports the number of transactions in each time period in each channel/sub channel.

- Identify clear growth opportunities in all categories in both retail and hospitality
- How often does each category (e.g. a soft drink) get bought in each channel and sub channel?
- How is this trending over time?
- Are you getting fair share of transactions/sales? You need to know your current share of transactions first.



TRANSACTION MONITOR

Available Monthly, Quarterly or Annually • Reporting last 52 weeks & 12 weeks

Foodservice and Retail

£POA

Module 3 – Geo Demographics

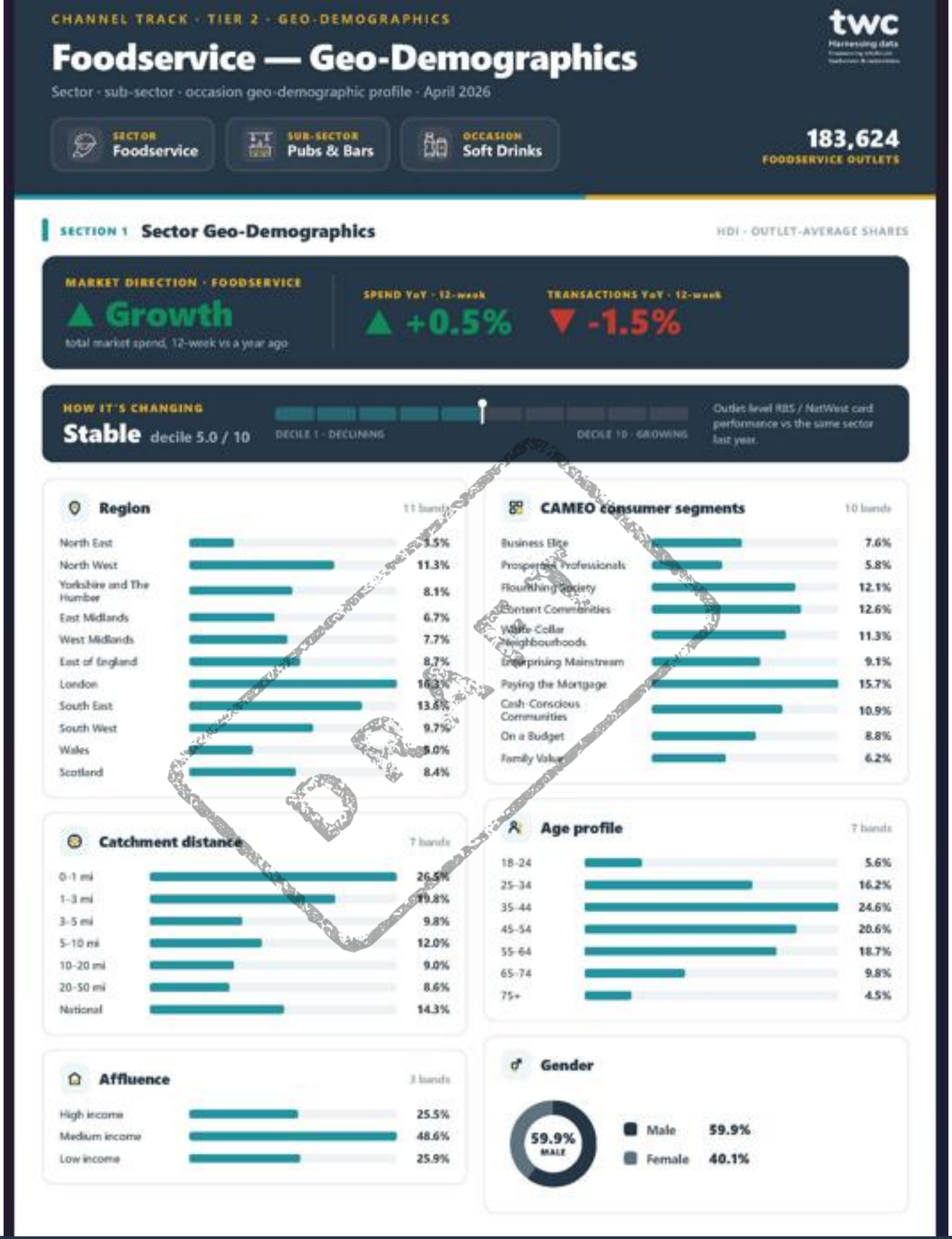
Who is driving growth?

Geo Demographics identifies which consumer groups are driving growth across channels, retailers and operators.

It also tracks how the customer mix changes over time, revealing which demographic groups are becoming more or less important and helping explain changes in channel or outlet performance.

This will help subscribers optimise ranging, marketing and activation based on changing shopper demographics

GEO DEMOGRAPHICS
Available Monthly, Quarterly, or Annually
Foodservice and Retail
£POA



Module 4 – Size of Prize

Quantify where the biggest opportunity for growth exists.

Where should you focus your efforts and investment?

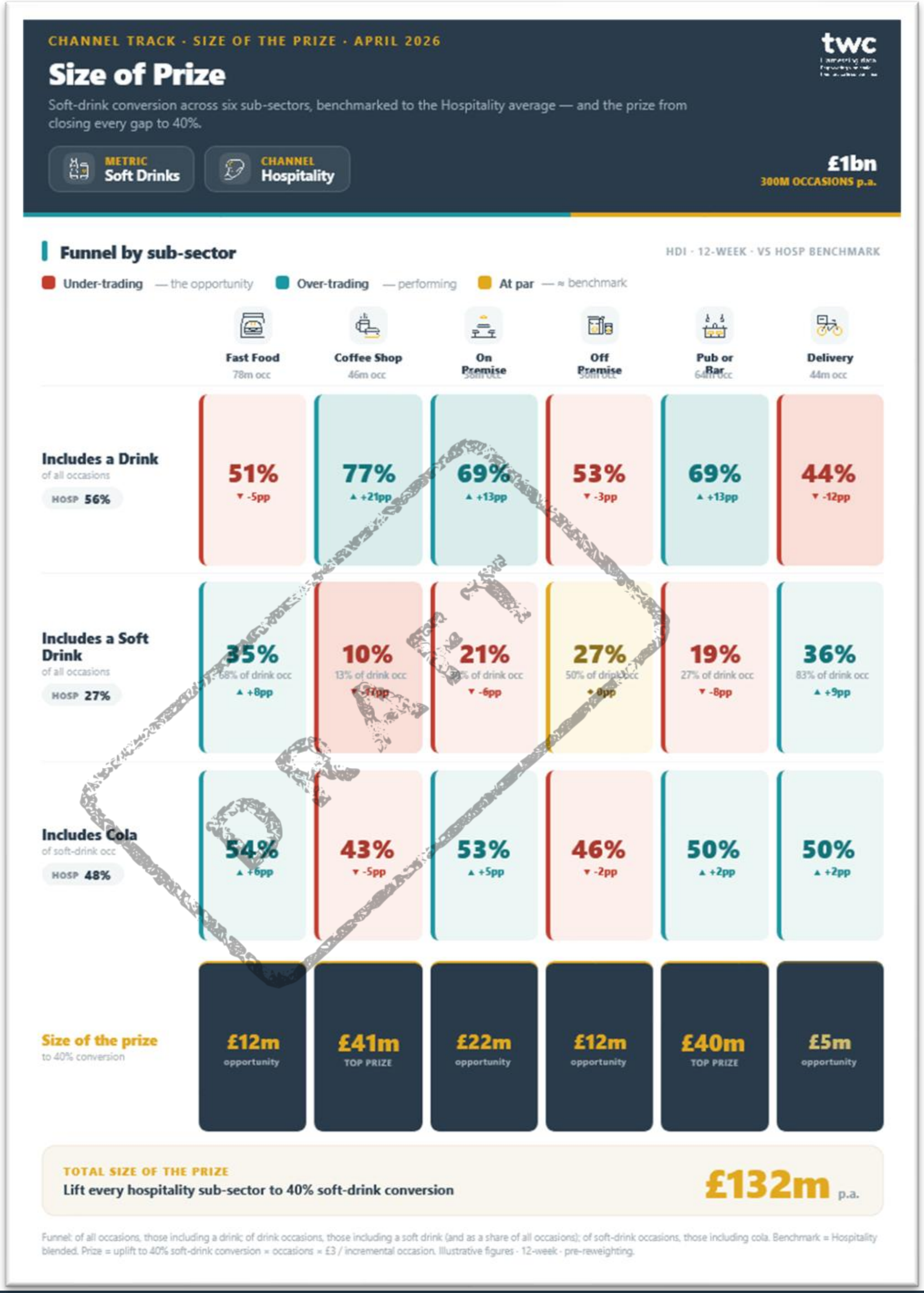
This module highlights if your category or brand performance (the mission/occasion your category/brand operates in) is below market benchmarks. It then puts a ££ size of prize figure target if you increase performance to that higher benchmark target.

It provides a clear view of where the largest conversion opportunities exist for you / your brands.

It answers:

- Which sectors are under-developed?
- Which occasions should we target?
- Which missions represent the biggest opportunity?
- Where should we focus investment?
- What is the indicative value of success?

SIZE OF PRIZE
Retail and Foodservice
£POA



Module 5 – Pen Portraits

Who is the customer?

Pen Portraits provides rich demographic profiles of the customers using each channel/sub channel/ fascia/chain or foodservice operator.

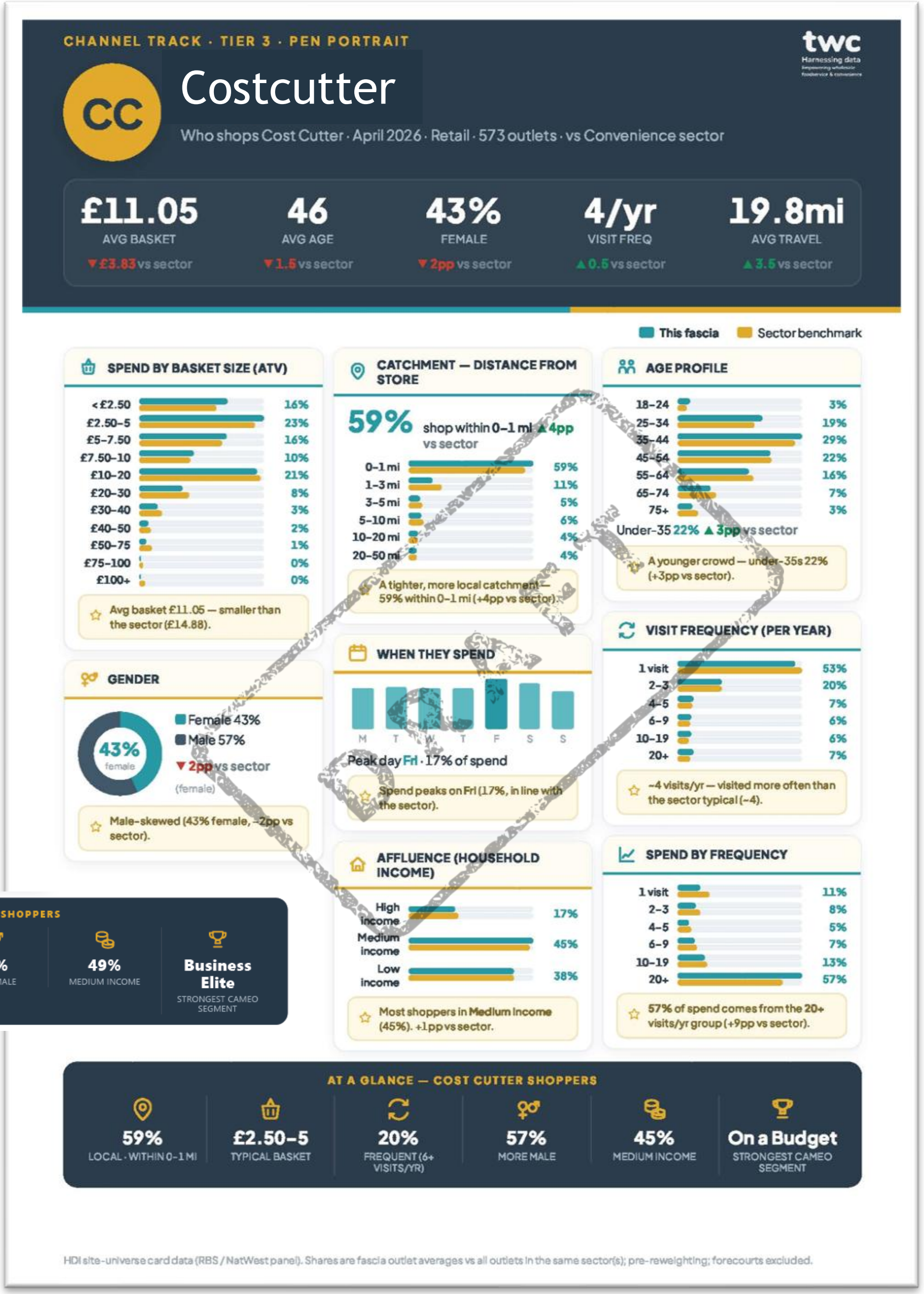
Great commercial decisions start with knowing who the customer is.

With this information, suppliers and wholesalers can then:

- Accurately target the right outlets
- With the most appropriate products, promotions, NPD
- Tailor/target marketing and engagement strategies
- Consider where to spend activation investment

This data comes from the 10.2m UK consumers who have spent ££ via their debit/credit card in each of 225,000 outlets.

PEN PORTRAITS
Available by Channel, Sub Channel, by named retail fascia and foodservice operator
Starting Prices: £2k or £5k for 3.



Module 6 – Outlet Level Targeting (Bullseye Targeting)

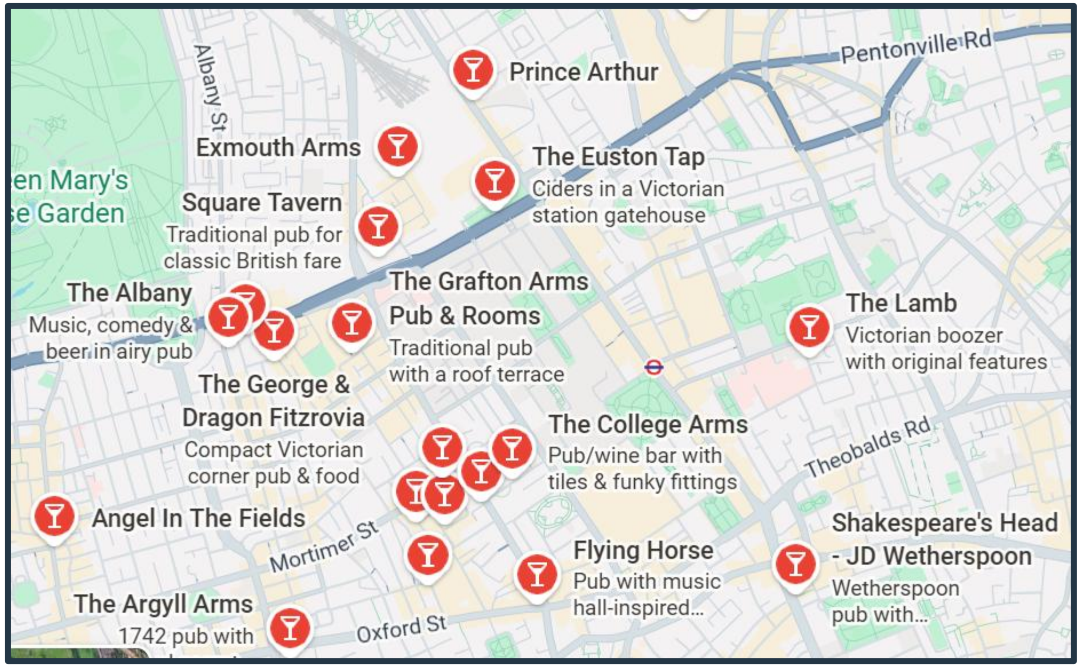
With 225,00 outlets (40,000 retail, 183,000 hospitality) under our radar, this provides highly valuable outlet level data to help wholesalers and suppliers achieve their channel goals.

Wholesalers can access this information to review performance of their customers and possibly benchmark this versus competitors.

Wholesalers will also find this information helpful for their own recruitment strategy.

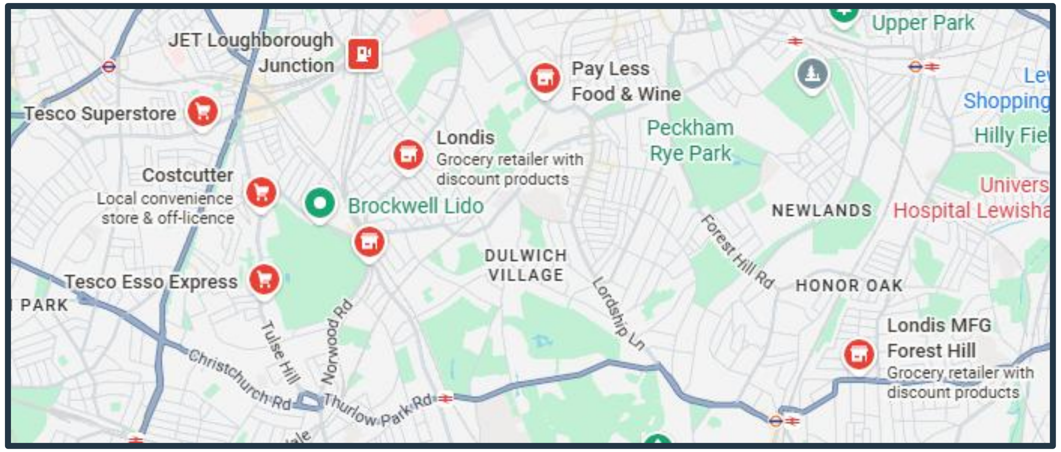
Suppliers will use this data to target outlets which are used by demographics which matches their target consumer, as well as affect range, pricing, promotion, planogram and merchandising recommendations based on the outlets' current customer base.

BULLSEYE TARGETING
£POA



Which of these OnTrade outlets should you target?

Which of these c-stores should you target?



Start with the ones which already attract your target market.

Use Channel Track to:

Track true market performance based on billions of card transactions, weighted accordingly to include cash transactions too.

Identify which channels/sub channels/operators are growing ahead of the market.

Quantify the number of occasions across the entire sector each month/quarter/ year. Quantify your share of those total occasions.

Quantify the gap (size of the prize).

Decide where to allocate channel resources to achieve the best/biggest ROI.

Understand who the customer is. And who the most important / valuable customers are.

Select which outlets to target.

Secure investment for this channel. Secure your share of the £2bn of available untapped sales

Thank you!

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