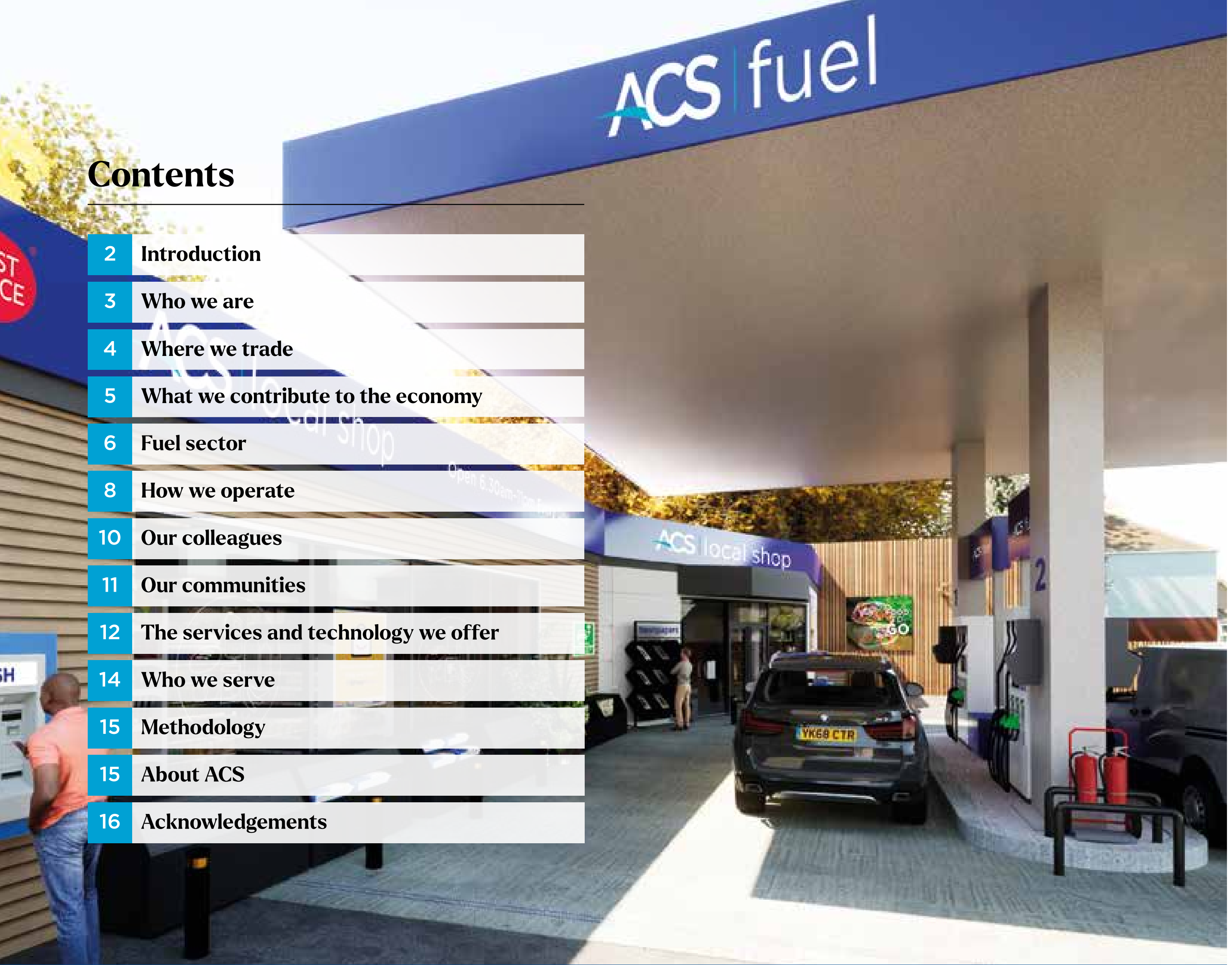
The Forecourt Report 2022

A report by the Association of Convenience Stores

#ForecourtReport

ACS the voice of local shops



Contents

The importance of forecourt stores

This is the eighth edition of the Forecourt Report, detailing the crucial contribution that the UK's forecourts make to the economy and the communities that they serve. Forecourts are an important part of the wider convenience sector, with thousands of customers seeing forecourts as their local shop and stores continuing to innovate in new services like Post Offices and food to go, invest in alternative power options for vehicles and diversify their range of products.

Compared to the rest of the convenience sector, forecourts typically face much higher running costs – despite this the forecourt sector is committed to investment and improving its offer to customers. Forecourts provide around 84,000 jobs for local people and have invested an average of around £18,000 per store over the last year, significantly higher than their non-forecourt convenience counterparts.

Forecourts are also committed to community retailing, with 69% taking part in some form of community activity over the last year. The information in this report is gathered from our own primary research, using forecourt specific data from the Local Shop Report survey. The report also draws on data that has been kindly provided by Experian Catalist, Portland Fuel, Zap-Map, Lumina Intelligence, Nielsen, Yonder and William Reed. Detailed information about the methodology and calculations in the report can be found on page 15.

Who we are

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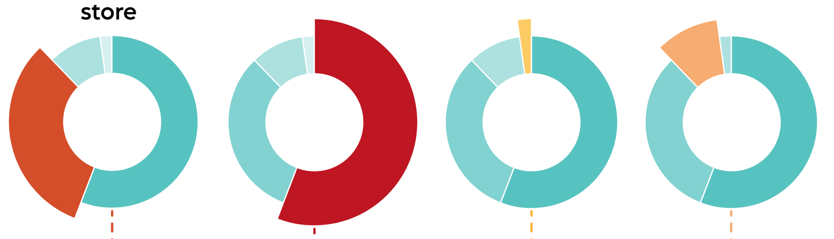
There are **8,379** fuel forecourt sites in the UK **7,407** have shops

Source: Experian's V2 2022 database release, September 2022

Store types



Full convenience store	Standard	Kiosk	None
32%	56%	2%	10%
2,695 stores	4,712 stores	168 stores	804 stores

Source: Experian's V2 2022 database release, September 2022

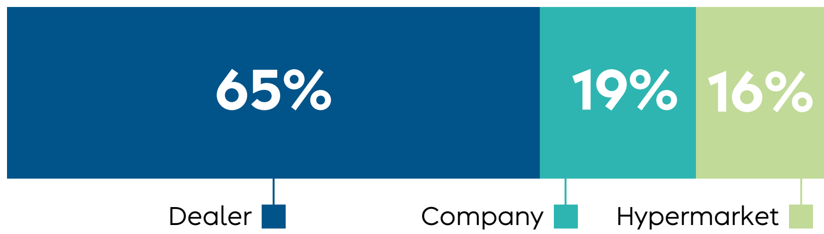
Full convenience store
Likely to be a modern branded shop development offering a wide range of convenience shopping for the motorist on the move. Often has dedicated shop parking.

Standard
Traditional forecourt shop building, selling newspapers, cigarettes, confectionery, oil plus some food, pre-packed sandwiches, snacks and drink items.

Kiosk
May sell a small amount of oil, cigarettes and confectionery.

None
No operating shop. Unmanned locations and some sites where payment is made in other premises e.g. a car dealership.

Forecourt shop ownership



Source: Experian's V2 2022 database release, September 2022

Dealer
An independently owned site usually supplied under an agreement with an oil company whose name usually appears on the brand sign. Also includes unbranded sites with no oil company identification.

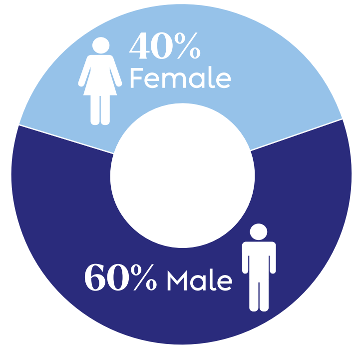
Company
Owned by the supplying oil company whose name appears on the brand sign.

Hypermarket
Owned and operated by the multiple retailers (hypermarket groups). Also includes sites that may be away from the main hypermarket store but are owned and branded by the hypermarket; and includes Co-op stores with Co-op branded forecourts.

Entrepreneurs

The people who own and run stores are:

Source: ACS / Lumina Intelligence 2022 (independents only)



White British	71%
Asian or Asian British	28%
Other	1%

Source: ACS / Lumina Intelligence 2020 (independents only)

Where we trade

There are **7,407** forecourts with shops in the UK

Source: Experian's V2 2022 database release, September 2022

Locations

Urban transient	9,983 stores	40%
Residential	2,064 stores	28%
Rural	1,245 stores	17%
Commercial/industrial	987 stores	13%
Motorway	128 stores	2%

Source: Experian's V2 2022 database release, September 2022

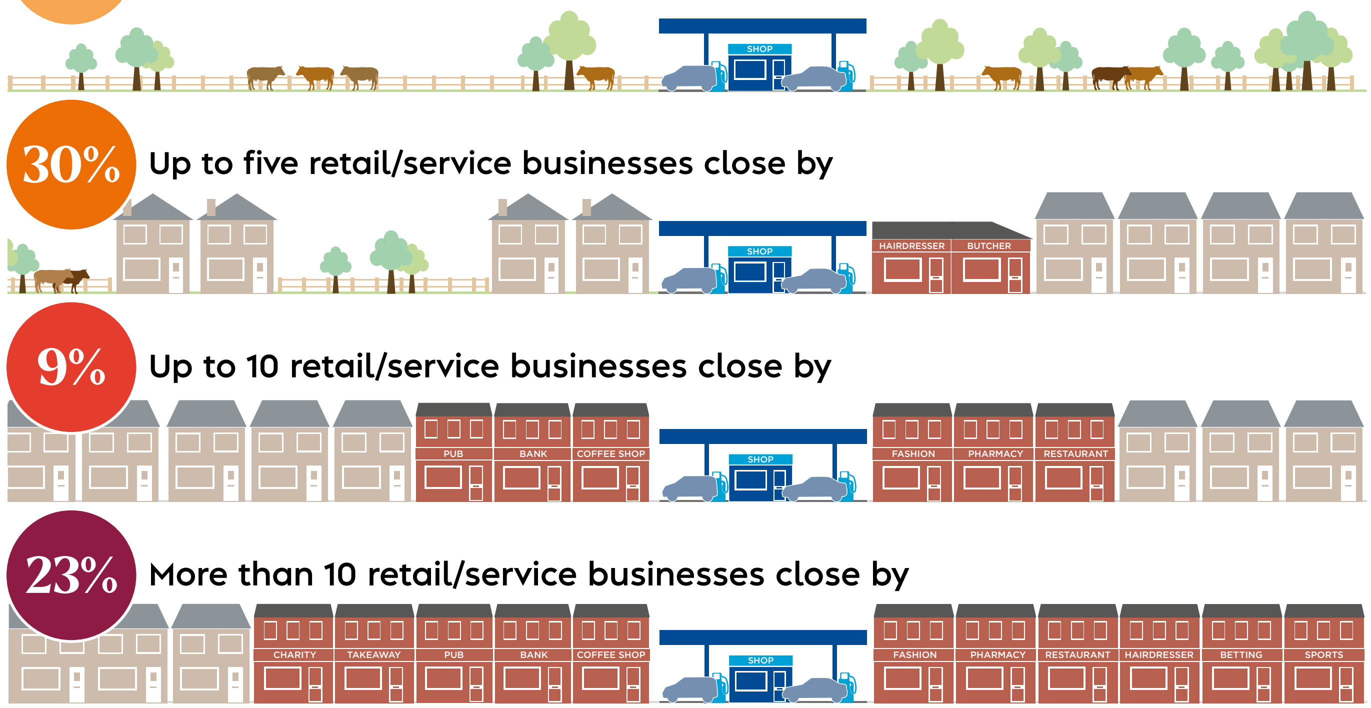
Neighbouring businesses

37% No other retail/service businesses close by

30% Up to five retail/service businesses close by

9% Up to 10 retail/service businesses close by

23% More than 10 retail/service businesses close by



Source: ACS / Lumina Intelligence 2021 (with shops; independents only)

What we contribute to the economy

The total value of **forecourt sales £4.8bn**

Source: Experian's V2 2022 database release, September 2022

Top 10 forecourt sales categories (multiples only)

1	£884m	Tobacco & vaping
2	£417m	Soft drinks
3	£263m	Beers, wines & spirits
4	£203m	Non-food
5	£188m	Confectionery
6	£148m	Convenience & deli of which £70m is sandwiches
7	£94m	Crisps, snacks, nuts & seeds
8	£60m	Health, beauty, toiletries & baby
9	£49m	Dairy of which £26m is fresh milk
10	£33m	Household & pet

Source: NielsenIQ Scantrack 2022. Data reflects multiple forecourt retailers only

Investment

Over the last year independent forecourts have invested **£17,995** per store » **62%** funded by own reserves

Source: ACS Investment Tracker / Voice of Local Shops polling (August 2021 – May 2022)

Top ten areas of investment (of those investing)

- Refrigeration **40%**
- Store signage **34%** (Bakery, Frozen, Dairy)
- Shelving **32%**
- In-store lighting **31%**
- Till system (e.g. EPoS) **28%**
- Air-conditioning **26%**
- Internal building maintenance **24%**
- Freezer space **23%**
- Parking provision **23%**
- Crime prevention measures **20%**
- Improving store access **20%**

Source: ACS Investment Tracker / Voice of Local Shops polling (August 2021 – May 2022)

Vehicle fuel and power

the voice of local shops

There are around:

410,000
PHEVs in the UK

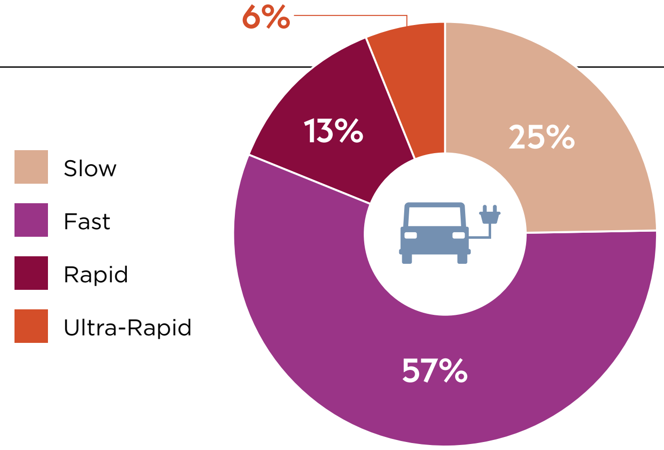
533,000
fully electric vehicles
registered in the UK

In the UK overall there are:
33,996 electric charging points at **20,534** locations

On UK forecourts, there are currently around:
768 electric charging devices
located on **446 sites** (excluding service stations)

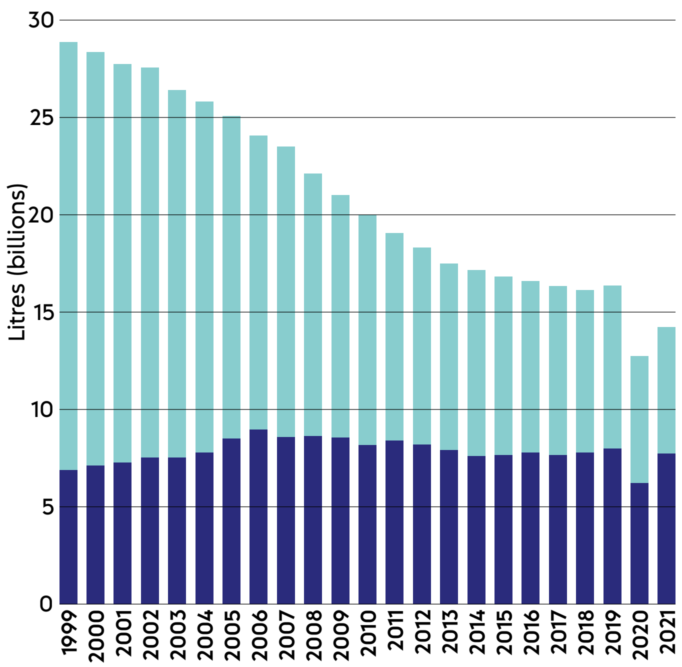
Source: Zap-Map, September 2022

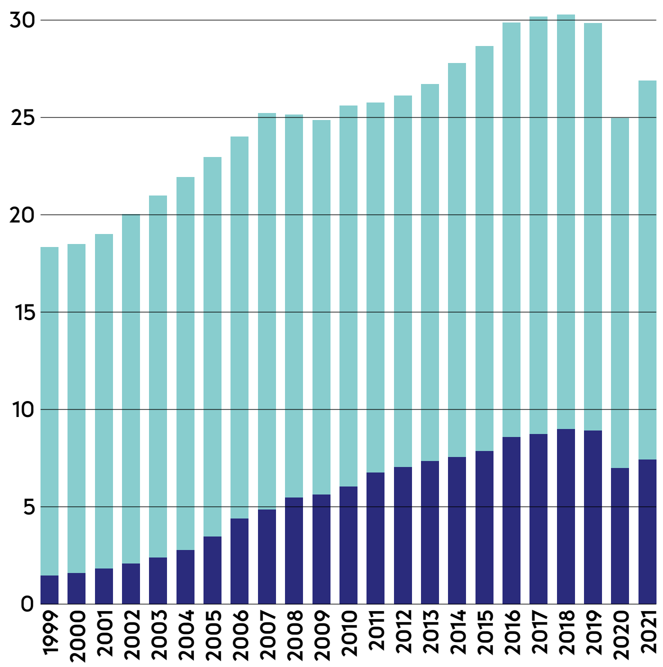
UK charging points by type



Source: Zap-Map, September 2022

Fuel sales (billions of litres)

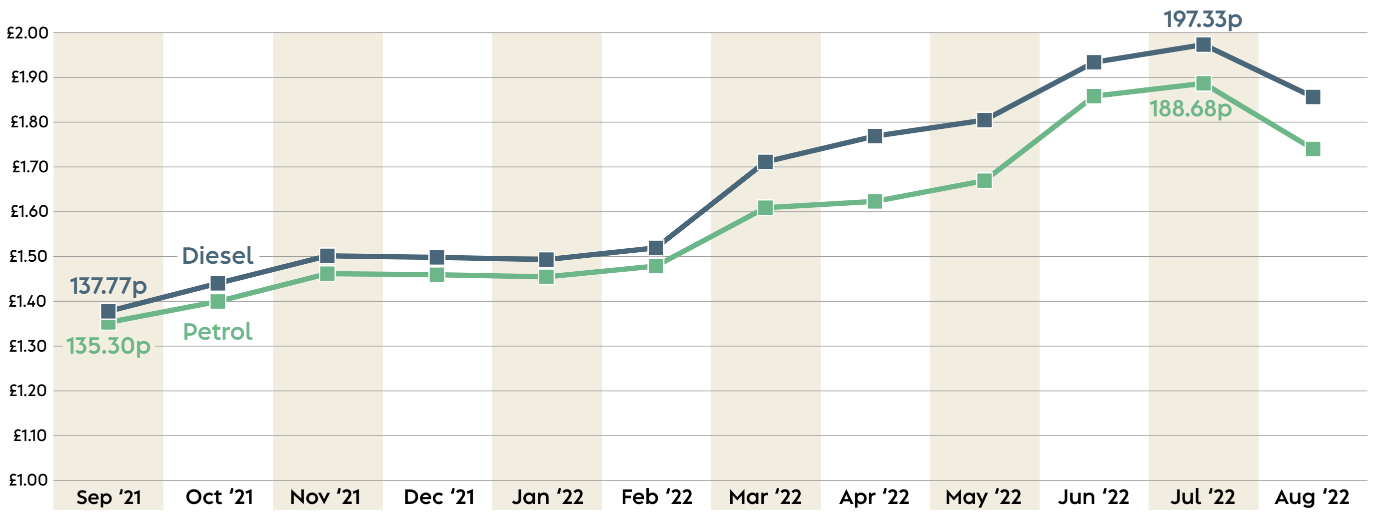




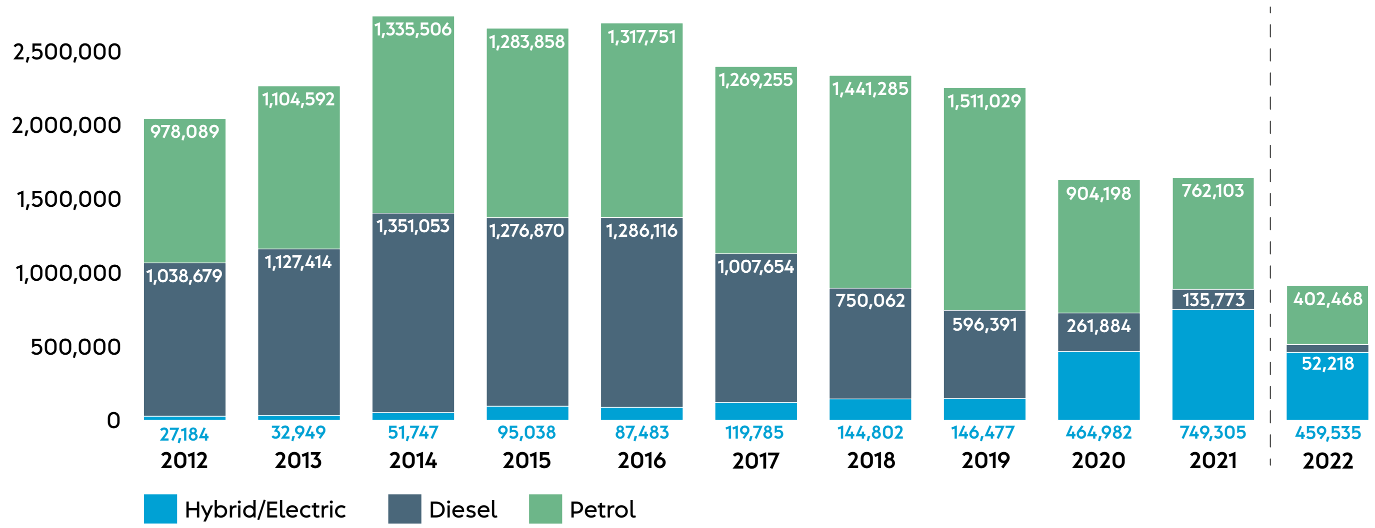
Of which supermarket sales · Of which non-supermarket sales

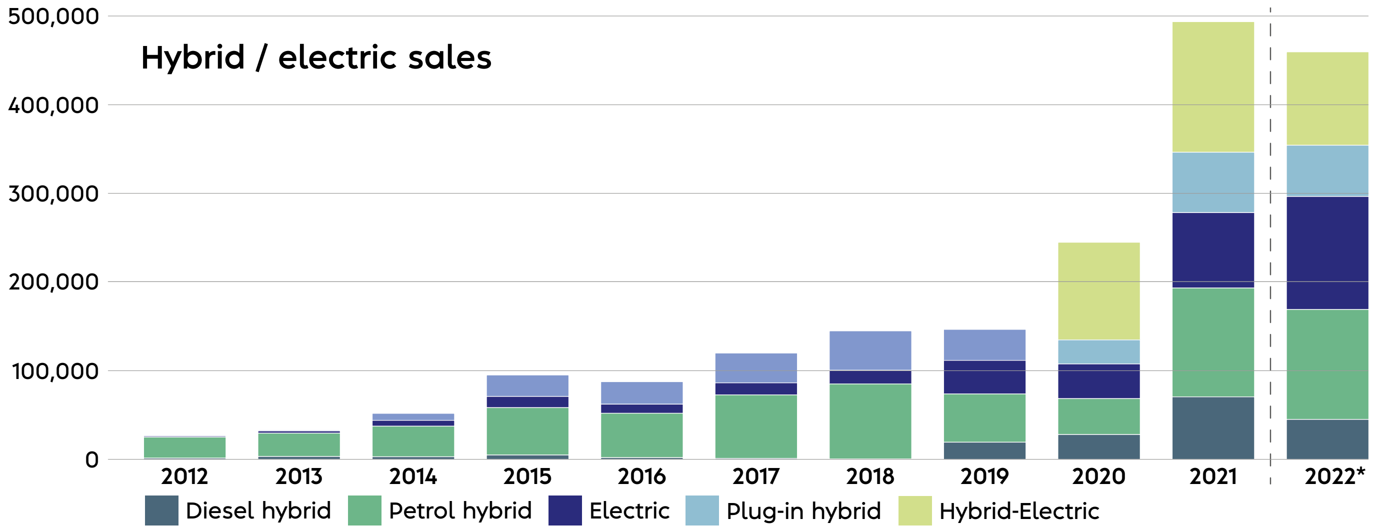
Source: Portland Fuel 2022

Fuel pricing trends (monthly average)



New car registrations by fuel type





*All years are full calendar year, except 2022 which is January to July inclusive

Source: All data on this spread Portland Fuel 2022

How we operate

80% of independents operate **one store**

Working hours

17% of forecourt retailers work more than **70 hours** per week

12% take **no holiday** per year

Business origin*

30% inherited family business

70% started business

Employment of family members

25% of retailers employ at least one family member

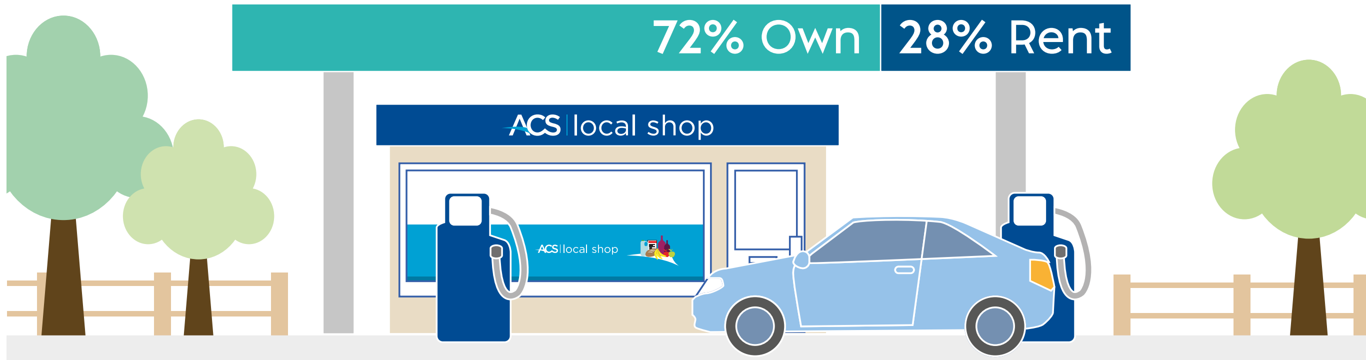
75% of retailers employ no family members

2% employ family only

Premises ownership (independents only)

72% Own

28% Rent



Source: All data on this page – ACS/Lumina 2022 (independent retailers only), apart from *ACS/Lumina 2020

Sales space

46%	44%	10%
1-999 sq. ft.	1,000-1,999 sq. ft.	2,000-3,000 sq. ft.

Source: ACS/Lumina Intelligence 2022 (independents only)

Opening hours

Open 24 hours

34% of **independent** forecourts

82% of **multiple** forecourts

Average opening hours

14.89 Monday to Saturday

14.12 Sunday

Source: ACS/Lumina 2021/2022

Online and social media presence

Facebook	Twitter	Instagram	WhatsApp	TikTok
44%	30%	26%	15%	12%

Energy saving

Chiller doors	LED lighting	Smart meter	Solar panels
50%	39%	17%	8%

Accessibility

Wheelchair access	Parking	Wide aisles	Hearing aid loops
61%	46%	37%	18%

Source: ACS/Lumina Intelligence 2021/2022

Our colleagues

The forecourt sector in mainland UK provides over **84,000 jobs**

Source: ACS/Lumina Intelligence 2022

Colleagues in the forecourt sector are:

40% (male) | 60% (female)

ACS/Lumina Intelligence 2021

23% 16-24 years old | 63% 25-60 years old | 14% Over 60

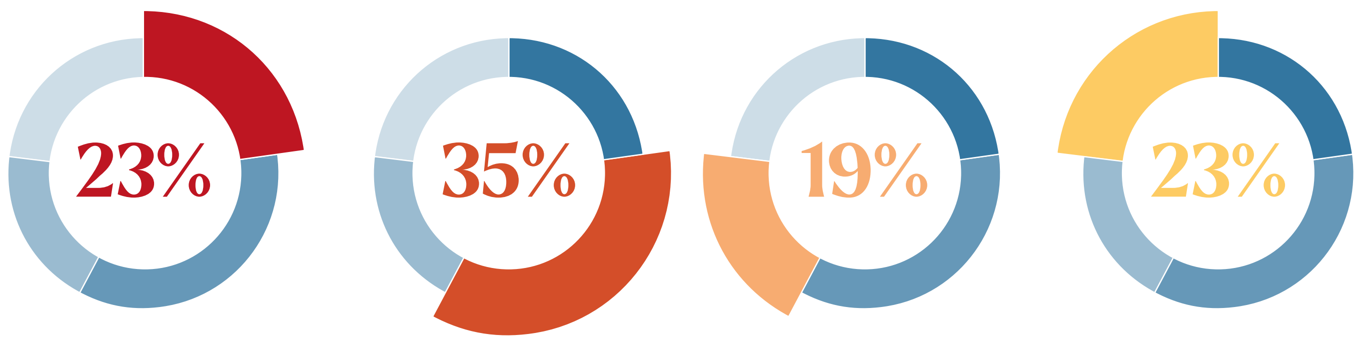
Source: ACS/Lumina Intelligence 2022

Hours worked

34% 0-16 hours
35% 17-30 hours
27% 31-40 hours
3% 40+ hours

Source: ACS/Lumina Intelligence 2022

Length of employment



Less than one year | One to five years | Six to 10 years | More than 10 years

Source: ACS Colleague Survey 2022 (overall convenience sector)

Our communities

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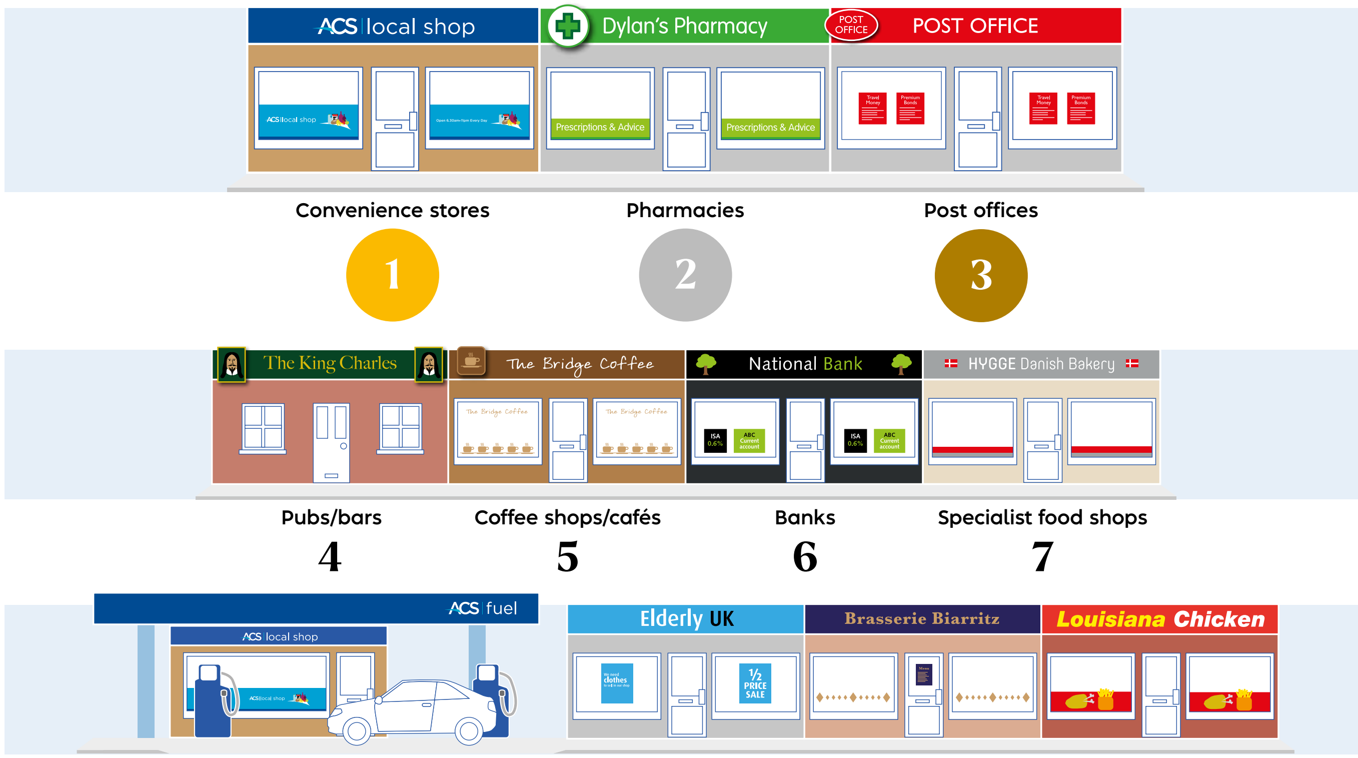
Most positive impact on the local area



1. Convenience stores
2. Pharmacies
3. Post offices
4. Pubs/bars
5. Coffee shops/cafés
6. Banks
7. Specialist food shops
8. Petrol stations
9. Charity shops
10. Restaurants
11. Fast food / Takeaways
12. Gyms/sports facilities
13. Hairdressers
14. Non-food
15. Betting shops

Source: ACS Community Barometer 2022

Community activity

69% of independent forecourts engaged in some form of community activity in the past year

53% Collecting money for a national or local charity

14% Providing funding, or in kind support, to a community event

13% Providing sponsorship to a local sports team or other community activity

7% Litter picking or other local environmental campaigns

7% Taking part in community, council or local business association meeting or project

28% Donating to a food bank

Source: ACS Voice of Local Shops polling August 2021 - May 2022

The services and technology we offer

The percentage of forecourts that provide each service is as follows:

- 71% Lottery
- 66% Mobile phone top-up
- 60% Bill payment services
- 54% Cash back
- Car wash: 41% Car wash (overall). Of which: 66% Jet wash (manual); 33% Automatic machine car wash; 21% Hand car wash (attended)
- 38% Community noticeboard
- 32% Customer toilets
- Cash machine: 32% Free to use cash machine; 25% Charged cash machine
- 28% Parcel collection point
- 24% Wood/domestic burning fuel
- 17% Local grocery delivery
- 14% Post office
- 13% Food bank collection
- 13% Plants/horticulture products
- 12% Click and collect services
- 12% Click and collect services for groceries
- 10% Recycling bins
- 9% Indoor seating area
- 8% Home news delivery
- 6% Outdoor seating area
- 6% Dry cleaning
- 3% Photo booth
- 3% Prescription collections

Food service

- 67% Customer operated coffee machine
- 28% Hot food counter or cabinet
- 28% In-store bakery
- 24% Microwave for customers
- 21% Food preparation area/kitchen
- 20% Serve over coffee machine
- 17% Food-to-go concession

The percentage of forecourts that have each of the following is:

69%	EPoS
48%	Store website
32%	In-store Wi-Fi
20%	Mobile marketing platform/ loyalty scheme
19%	Digital advertising screens
10%	Self-service checkouts
9%	Digital shelf edge labels
4%	Power outlets/USB ports for charging customer devices

Source: ACS/Lumina 2021/2022 unless stated otherwise

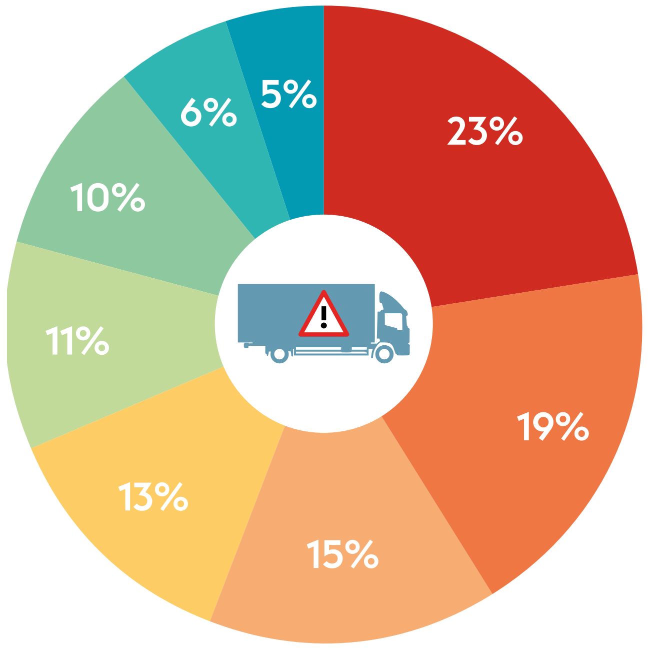
Payment methods

100%	Cash
100%	Debit card
100%	Credit card
96%	Contactless and mobile payment
37%	Card not present transactions

Source: ACS/Lumina Intelligence 2022

Shop product sourcing issues

57% of retailers experienced issues affecting the supply of products for their business



- Late deliveries
- Incomplete deliveries
- Availability at cash & carry
- Increased costs of deliveries
- Cancelled deliveries
- Restrictions on orders
- Shorter shelf life on fresh products
- Purchase restrictions at cash & carry

Source: Voice of Local Shops polling May 2022 (excludes fuel supply)

Forecourt services

20%	Pay at pump
11%	LPG (liquid petroleum gas)
6%*	Ad Blue (pumped)
8%	Red diesel
5%	Electric vehicle charging point

Source: ACS/Lumina Intelligence 2021/2022
*Source: Experian's V2 2022 database release, September 2022

Who we serve

Forecourt customers are:

43% | 57%

Source: Lumina Intelligence CTP 2022

Customers travel to store

The average distance travelled to store is:

Forecourt shopper **3.28** miles

Standalone convenience shopper **1.48** miles

Source: Lumina Intelligence CTP 2020

66% of forecourt shoppers **drive to store** versus 36% for standalone convenience shoppers

Source: Lumina Intelligence CTP 2022

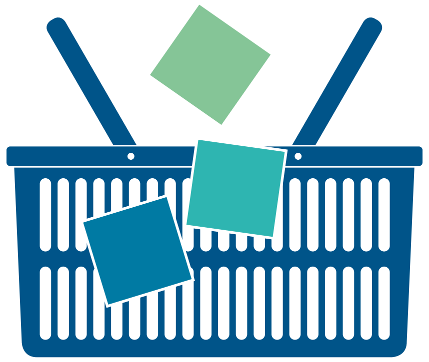
How often customers visit

Every day	Mon 1	Tue 2	Wed 3	Thu 4	Fri 5	Sat 6	Sun 7	21%
Most days (5-6 times a week)	Mon 1	Tue 2	Wed 3	Thu 4	Fri 5	Sat 6	Sun 7	20%
Every other day (3-4 times a week)	Mon 1	Tue 2	Wed 3	Thu 4	Fri 5	Sat 6	Sun 7	12%
About once a week (1-2 times a week)	Mon 1	Tue 2	Wed 3	Thu 4	Fri 5	Sat 6	Sun 7	24%
Less than once a week	Mon 1	Tue 2	Wed 3	Thu 4	Fri 5	Sat 6	Sun 7	20%

The average customer visits their local store **3.8** times per week

Source: Lumina Intelligence CTP 2022

Purchases



The average basket size is **3.0** items

The average spend is

£10.38 excluding fuel

Source: Lumina Intelligence CTP 2022

Methodology

ACS the voice of local shops

Primary data for The Forecourt Report was undertaken by ACS in the form of two surveys:

1. **Independent Forecourt Survey** – A sub-sample of the Local Shop Report dataset, specifically the 220 independent retailers which are fuel forecourts (both symbol group and unaffiliated forecourt independents). The Local Shop Report includes a sample of 2,420 independently owned convenience store businesses in the UK. ACS commissioned Lumina Intelligence to aid in the design and delivery of the survey. The survey was carried out over the phone between 6th June and 15th July 2022. The telephone survey gathered responses from unaffiliated independent convenience stores, independent forecourt stores and independent stores that are part of a central buying or marketing group (known as 'symbol' groups). These are represented in the survey in the same proportion as they are represented in the market. The survey covers the nine regions of England, along with Wales and Scotland.

2. **Multiple Forecourt Survey** – ACS conducted an online/paper survey of its multiple forecourt members. This survey was based on the questions asked in the Independent Forecourt Survey, where relevant, to ensure consistency.

ACS Voice of Local Shops survey
ACS conducts quarterly surveys of 110 independent forecourt retailers, to establish the amount retailers have invested over the past quarter, what they have invested in and how they have funded their investments. The survey also looks at the community activity undertaken by independent retailers. The data included in the report is an average of the latest four quarters (November 2021– August 2022). Data in the report refers to independent forecourt retailers only.

Market Summary Report 2022 – Experian Catalist
Catalist surveyors visit 4,500 forecourts spread over each 12-month period – circa 50% of the UK forecourt network each year. Catalist surveyors are typically ex-oil company or ex-forecourt shop suppliers and are very familiar with the forecourt sector. During a visit, surveyors update data and take photos of the forecourt sites. The number of forecourt sites in the UK includes forecourts in Northern Ireland. Where specified within the report the data refers to forecourts specifically with a shop located on site.

Portland Fuel
Portland Analytics' price assessments reflect trading transactions conducted in North West European wholesale markets. This is further supplemented through analysis of a wide range of historical customer, supplier and government data sources.

Zap-Map
Data correct as of October 2022. For more information about the data please visit: https://www.zap-map.com

Sales Category data 2022 – Nielsen
The data included in the report refers to sales for multiple forecourt retailers only. Category definitions are revised throughout the year to align with retailers and therefore categories may not be directly comparable with previous forecourt reports. For more information please visit: https://www.nielsen.com/uk/en.html

Convenience Tracking Programme 2022 – Lumina Intelligence
This programme is a survey of over 20,000 convenience shoppers conducted at the 'moment of truth' in-store. 'Forecourt shoppers' refers to customers shopping specifically at forecourt stores rather than standalone convenience stores.

Community Barometer
Populus surveyed a nationally representative online sample of 1,000 UK adults aged 18+, in May 2022. Respondents were surveyed using a questionnaire designed by ACS.

For more Community Barometer results please visit the ACS website or email rosie.wiggins@acs.org.uk

Throughout the report, where percentages do not add up to 100%, this is due to rounding.

About ACS

The Association of Convenience Stores is a trade association representing local shops across the UK.

We represent our members through effective lobbying, industry leading advice and networking opportunities for retailers and suppliers.

Our membership includes a diverse range of convenience store retailers, from stand-alone family run independent stores to symbol groups and multiple convenience stores. These retailers operate in neighbourhoods, villages, on petrol forecourts and in city centres.

ACS' core purpose is to lobby Government on the issues that make a difference to local shops.

We represent the interests of retailers on a range of issues, including business rates, energy, regulation, planning, alcohol and many more.

ACS produces several reports throughout the year, looking in detail at different aspects of the convenience store sector, all of which are available free to members.

We can also provide further breakdowns of The Forecourt Report data to members. Please contact Rosie Wiggins at rosie.wiggins@acs.org.uk for further details.

For more information about ACS, visit our website.

ACS.org.uk

Acknowledgements

This report would not have been possible without the support of a number of industry and research organisations that have helped by providing data.

experian. Lumina Intelligence nielsen PORTLAND William Reed ZAP MAP

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