



The Rural Shop Report 2023

A report by the Association of Convenience Stores

[#RuralShopReport](#)

ACS | the voice of
local shops

There are **48,590** convenience stores in mainland UK

17,720 of these stores are rural



There are a **higher proportion of rural shops in Wales** than in any other part of mainland UK

Source: WRBM 2022

There are over 17,000 rural shops in the UK, providing essential goods and services and acting as a social and community hub for tens of thousands of people across the UK. Rural shops are often the only grocery business for several miles, and in some isolated areas, the only business at all, so their importance to the communities that they serve cannot be underestimated.

Rural shops and other rural businesses face significant challenges when trying to improve their offer to customers. Supply chain limitations, delivery schedules, broadband connectivity and mobile coverage are all areas where rural shops can be adversely affected compared to their more urban counterparts. The Rural Shop Report demonstrates the importance of these businesses and a need for policymakers to include them within conversations on the levelling up agenda.

The information featured in this report is gathered from our own primary research, as well as data kindly supplied by other organisations such as Lumina Intelligence, William Reed and the Plunkett Foundation. Detailed information about the methodology and calculations in the report can be found on page 16 and online at [ACS.org.uk/research](https://acs.org.uk/research)

Over the last year, rural convenience stores have:

Achieved **£16.4bn** in sales

Contributed **£3.5bn** in GVA

Provided over **142,000** jobs

Investment

Over the last year, rural convenience stores have invested **£214m** in their businesses

Who we are

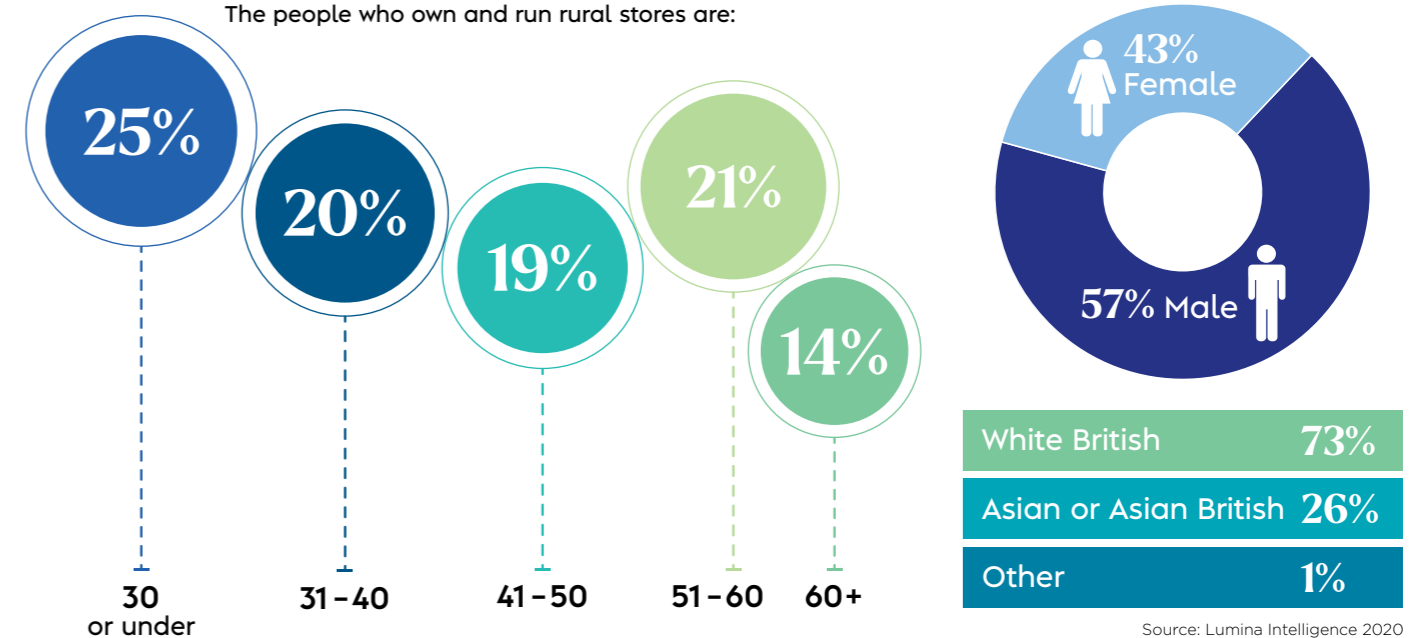
76% of rural convenience stores are **independently owned**

15%

of rural store owners have been in the business for **more than 25 years**

Entrepreneurs

The people who own and run rural stores are:



Neighbouring businesses

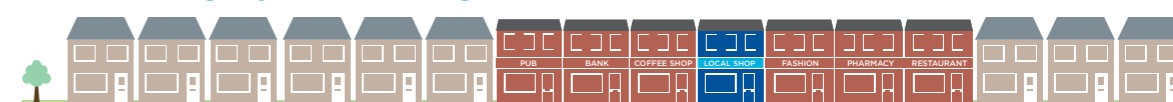
41% **Isolated store** No other retail/service businesses close by



46% **Located on a small parade** Up to five retail/service businesses close by



13% **Located on a larger parade or village centre** More than five retail/service businesses close by

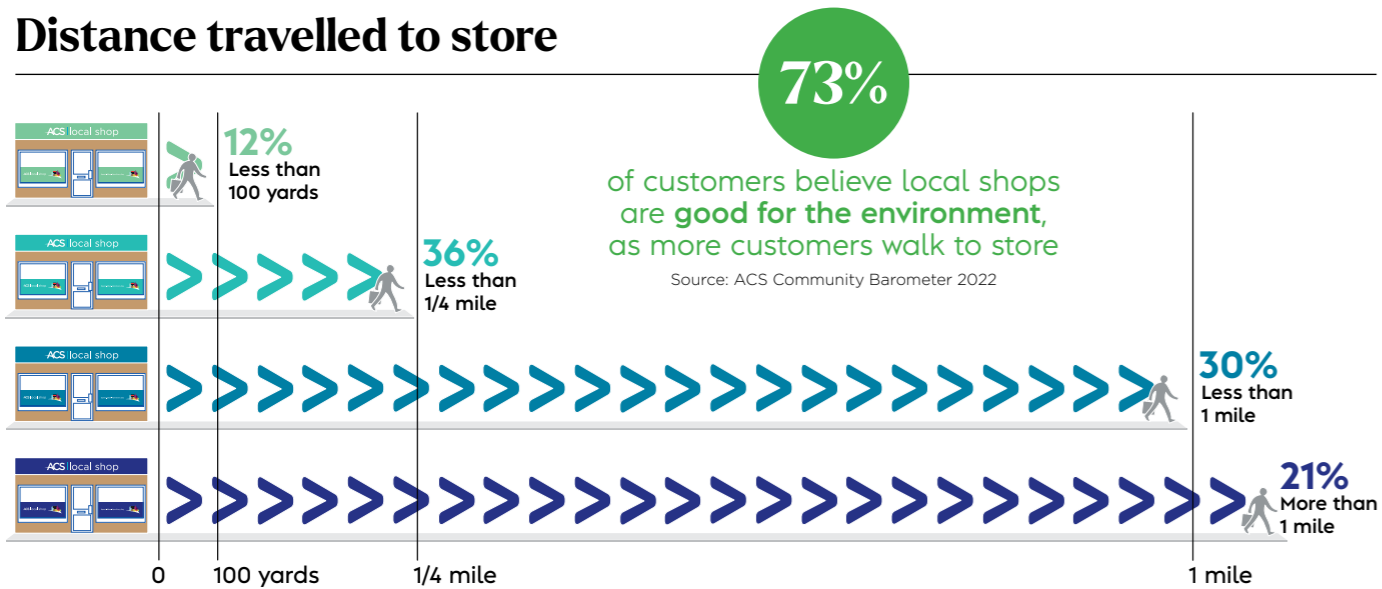


How customers get to store



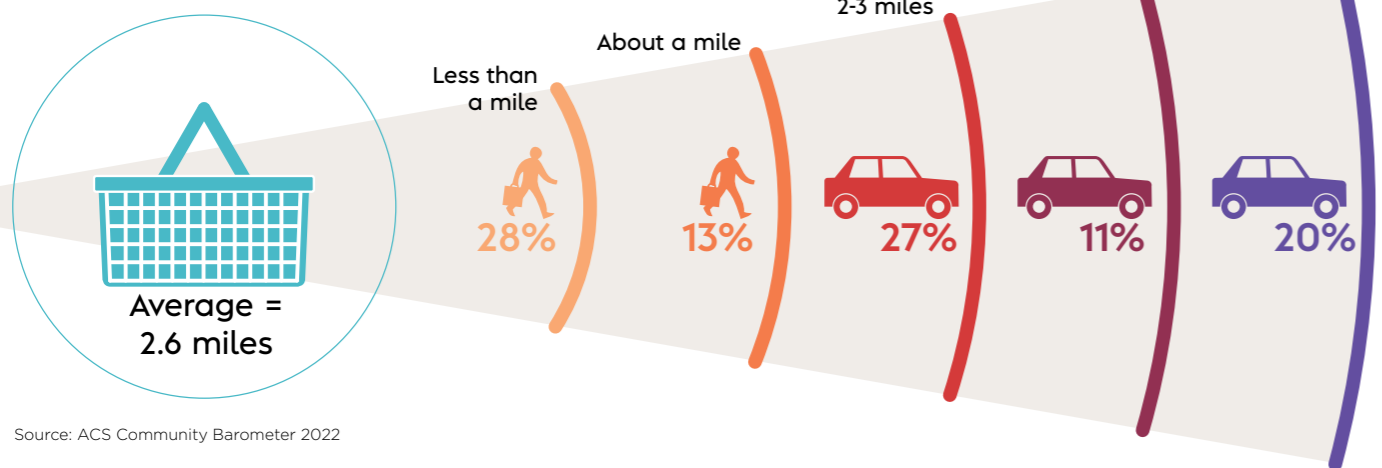
Source: Lumina Intelligence CTP 2022

Distance travelled to store



Source: Lumina Intelligence CTP 2021

If their local shop was no longer there, customers would have to travel:



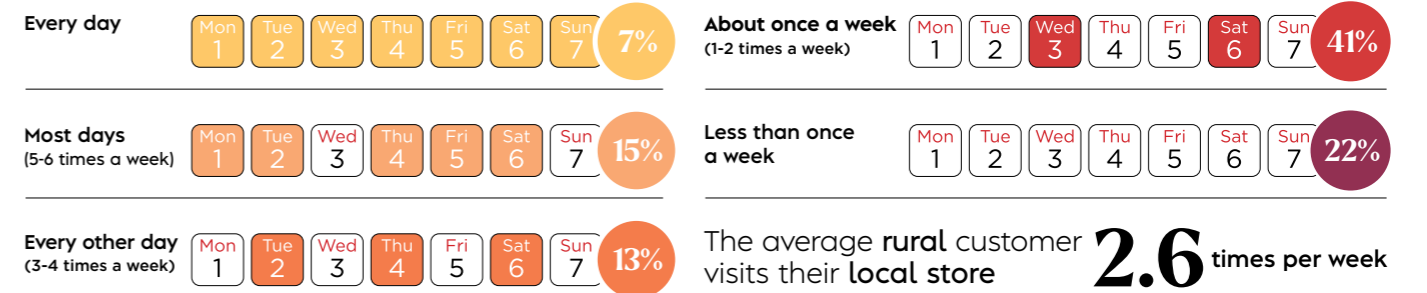
Source: ACS Community Barometer 2022

Purchases

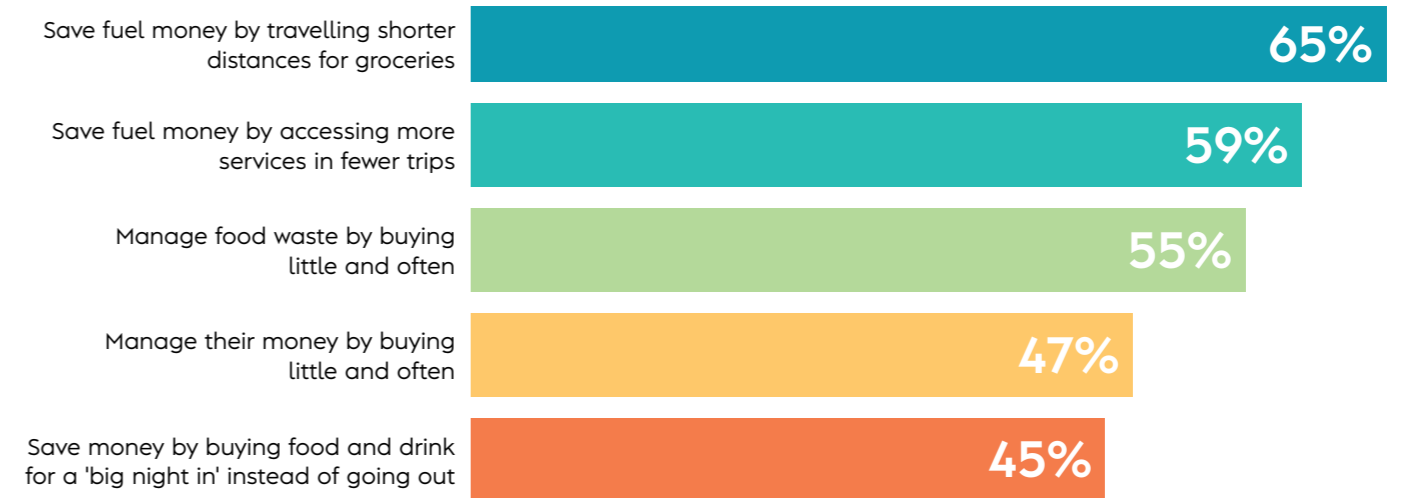


Source: Lumina Intelligence CTP 2022

How often customers visit



How local shops can help during the cost-of-living crisis, according to consumers



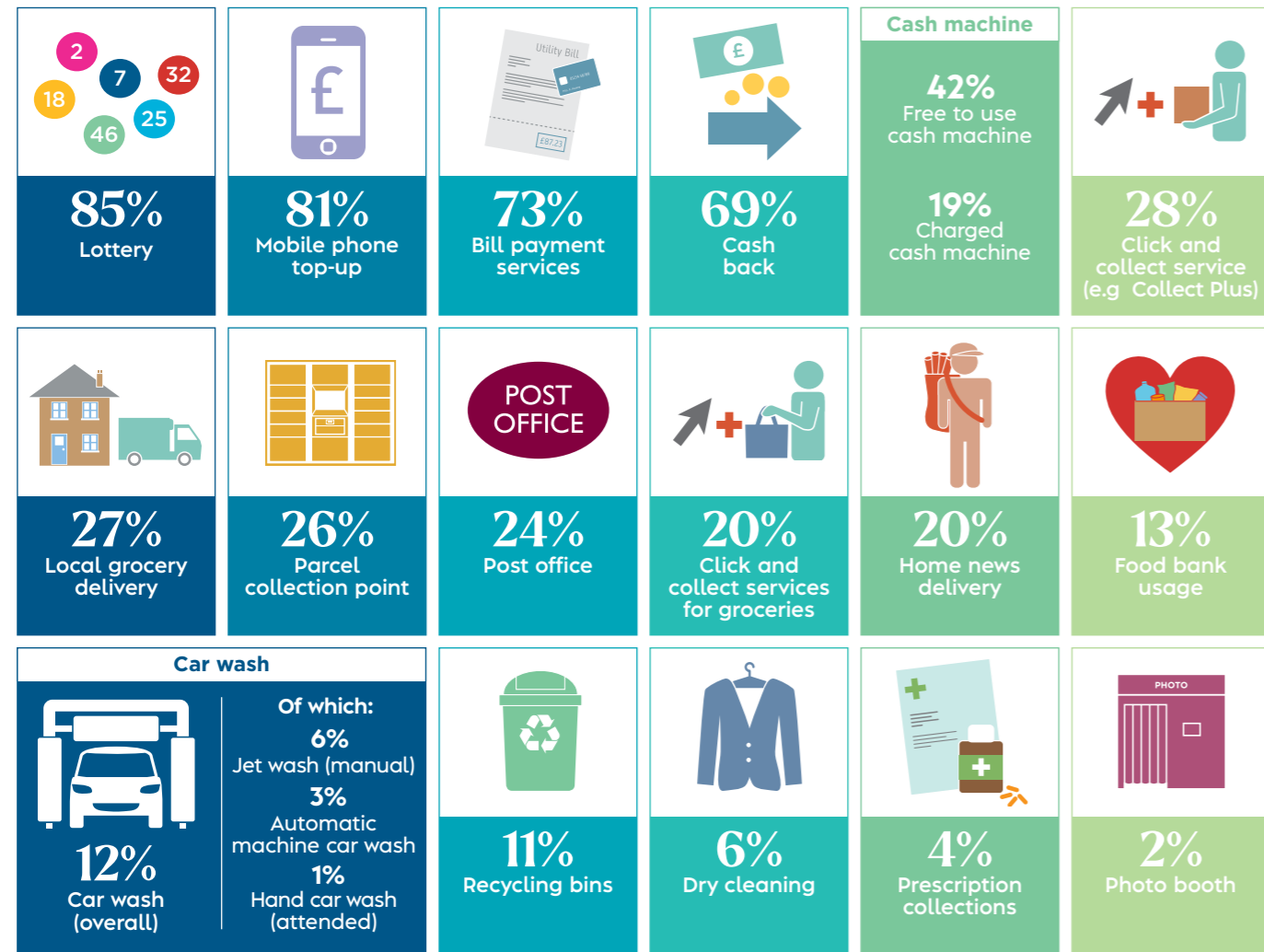
Customer's relationship with convenience store colleagues



Source: ACS Community Barometer 2022

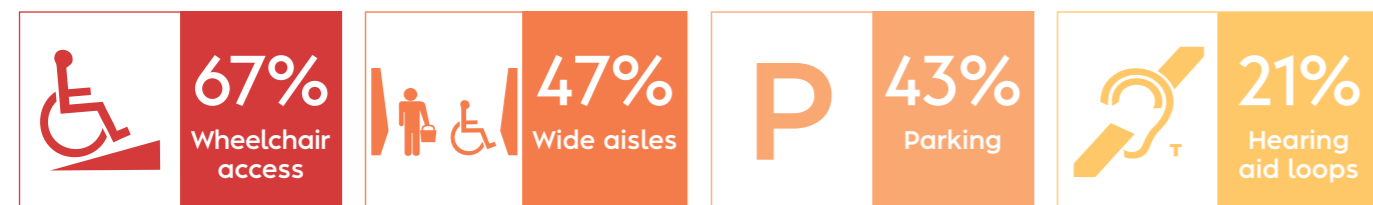
The services and technology we offer

The percentage of rural stores in the convenience sector that provide each service is as follows:



Accessibility in stores

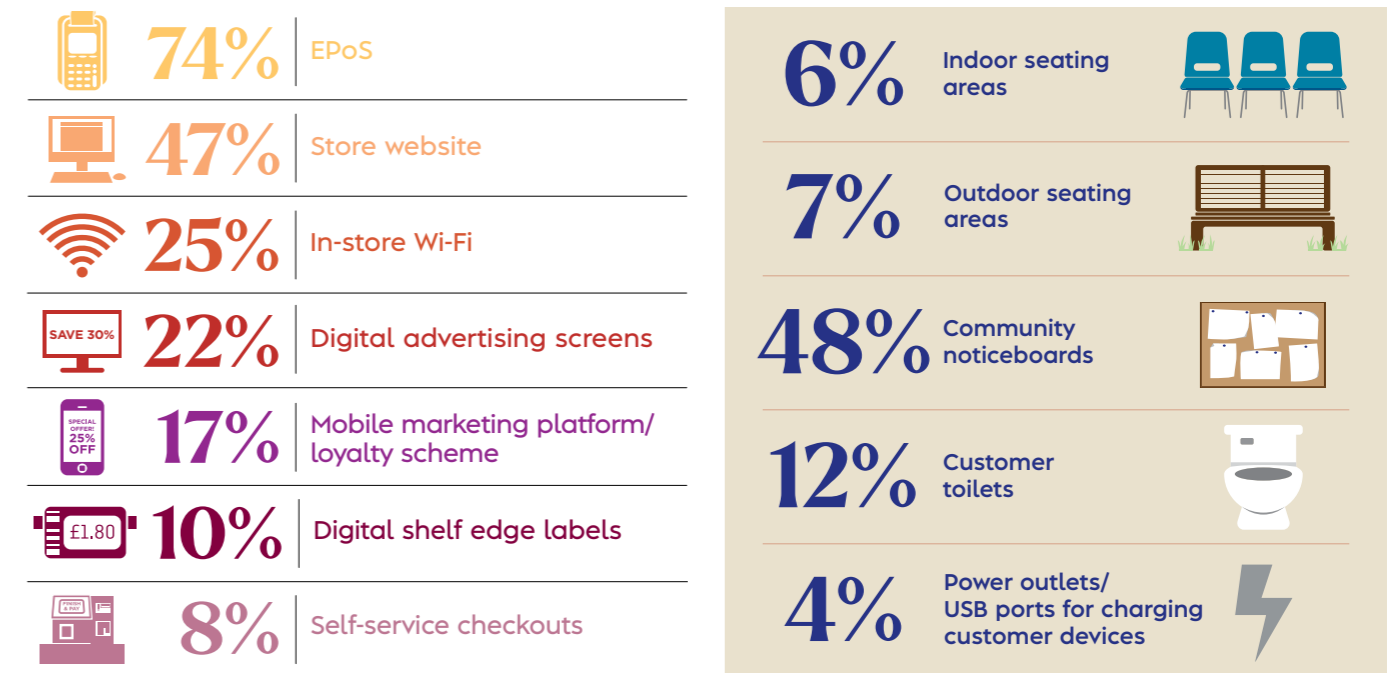
The percentage of rural convenience stores that have:



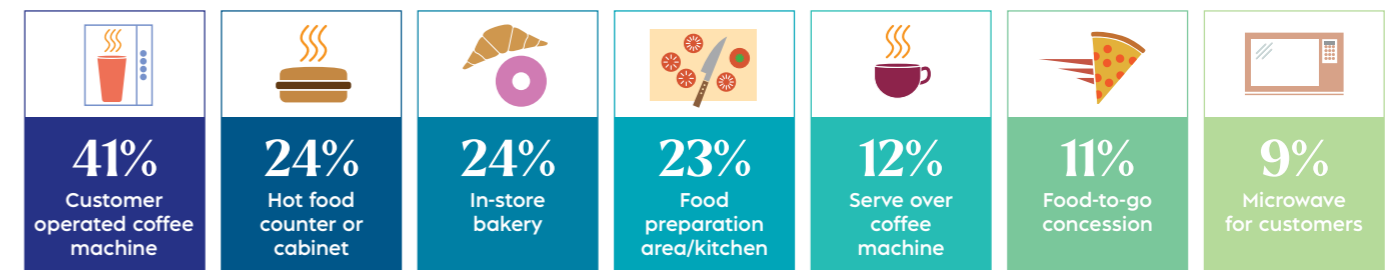
CCTV



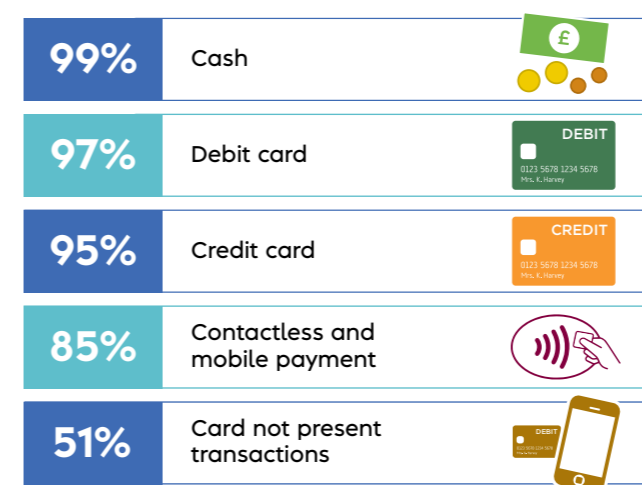
The percentage of rural stores in the convenience sector that have each of the following are:



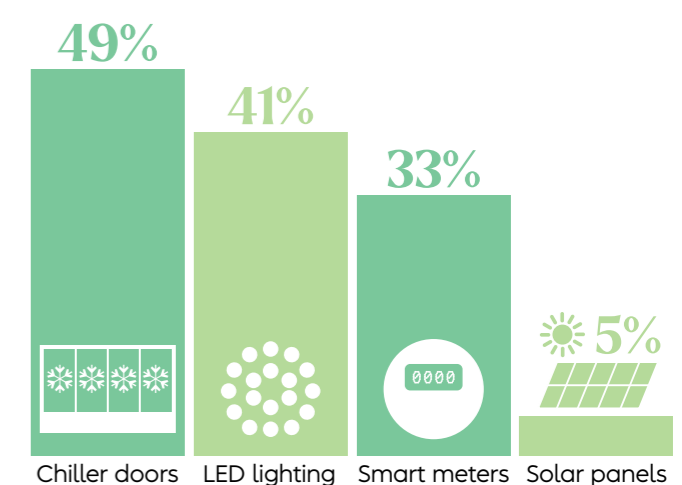
Food service



Payment methods

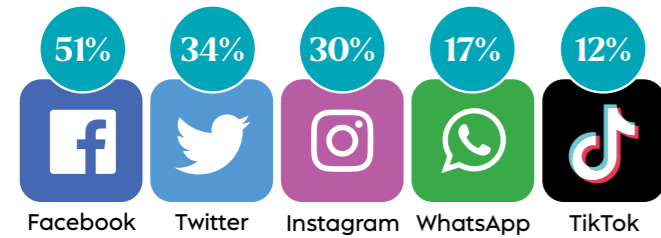


Energy saving



Online and home delivery

Social media and online searches



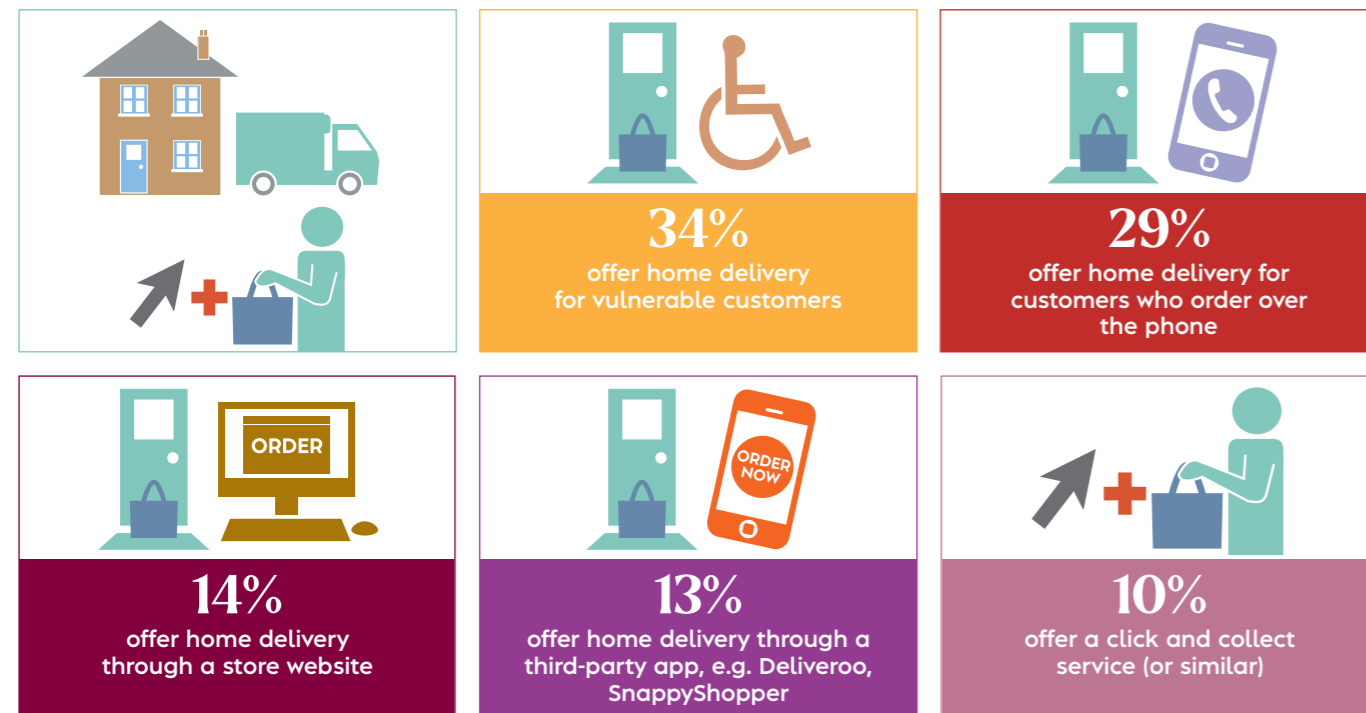
More customers searched for 'convenience stores' on Google during the week of (1st - 7th May) than any other time in the last 12 months.

Source: ACS/Lumina Intelligence 2022

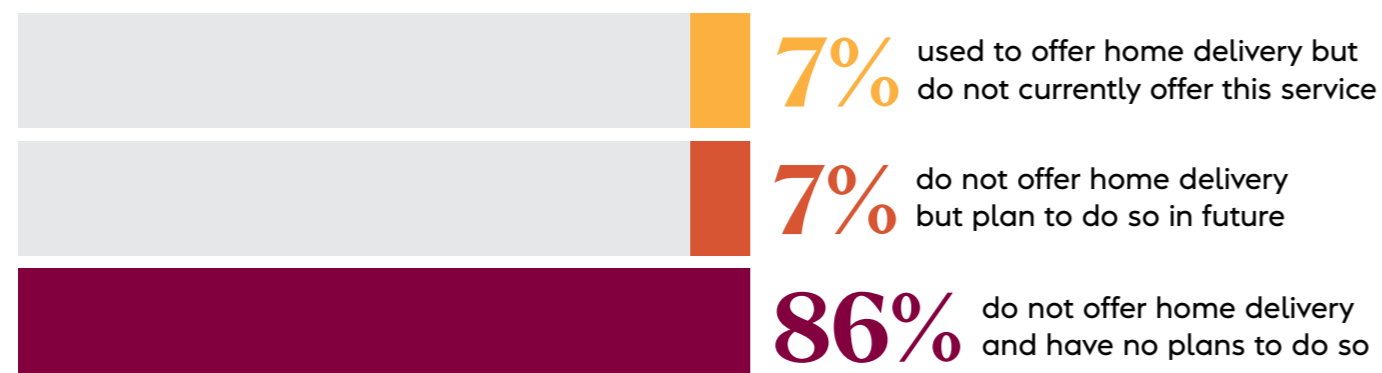
Source: Google Trends 2022

Home delivery

Of stores who currently offer home delivery/click and collect services:

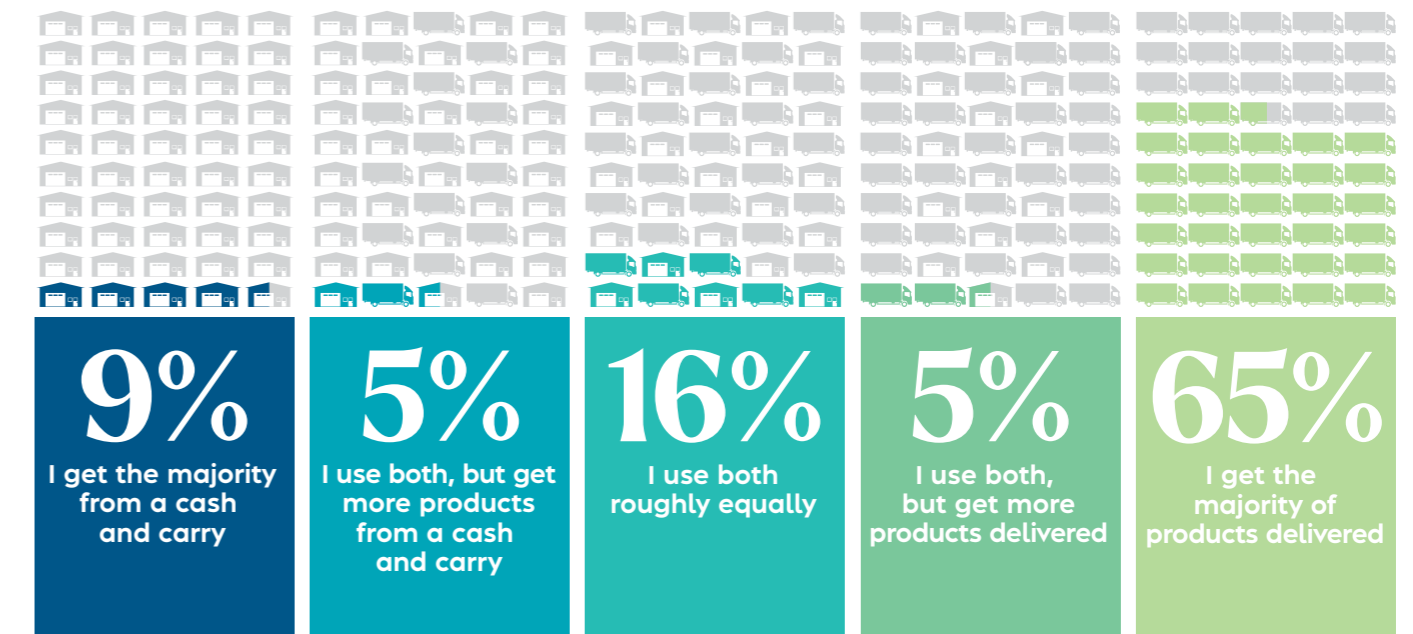


Of those who don't offer delivery:



How we source products

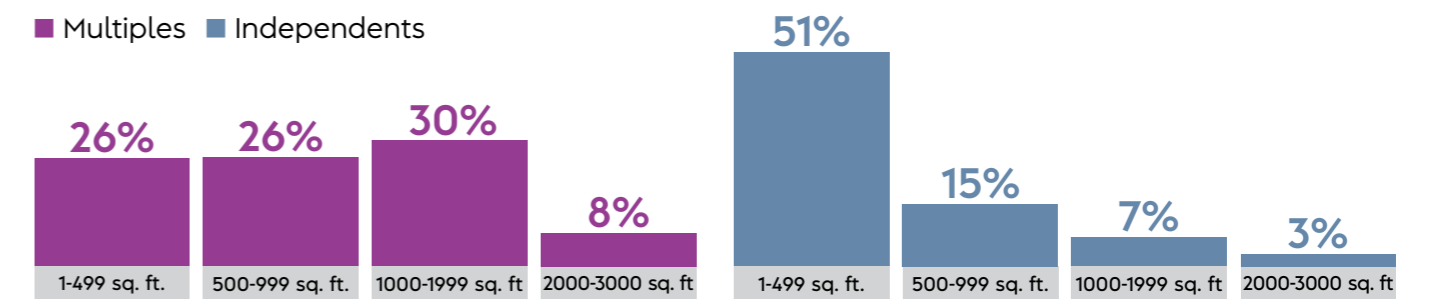
How independent retailers source their products



Source: ACS/Lumina Intelligence 2022

Additional space in stores

24% of rural independent retailers have no additional space in stores



Source: ACS/Lumina Intelligence 2019

Use of online wholesaler platforms



88% of rural independents operate **one store**

Working hours

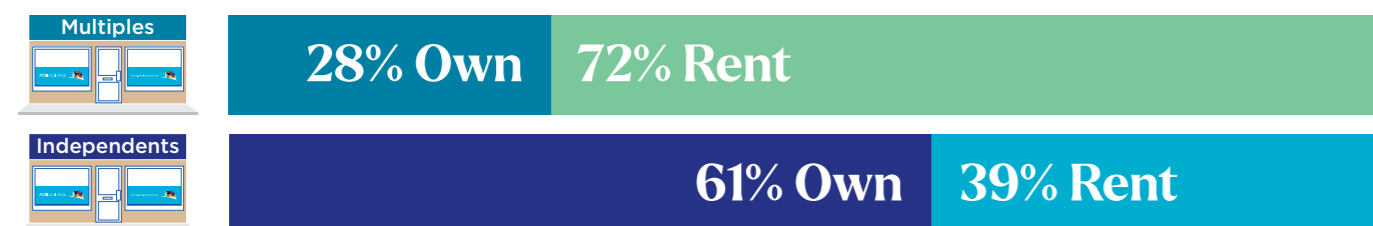
7% of shop owners work more than **70 hours** per week

23% take **no holiday** per year

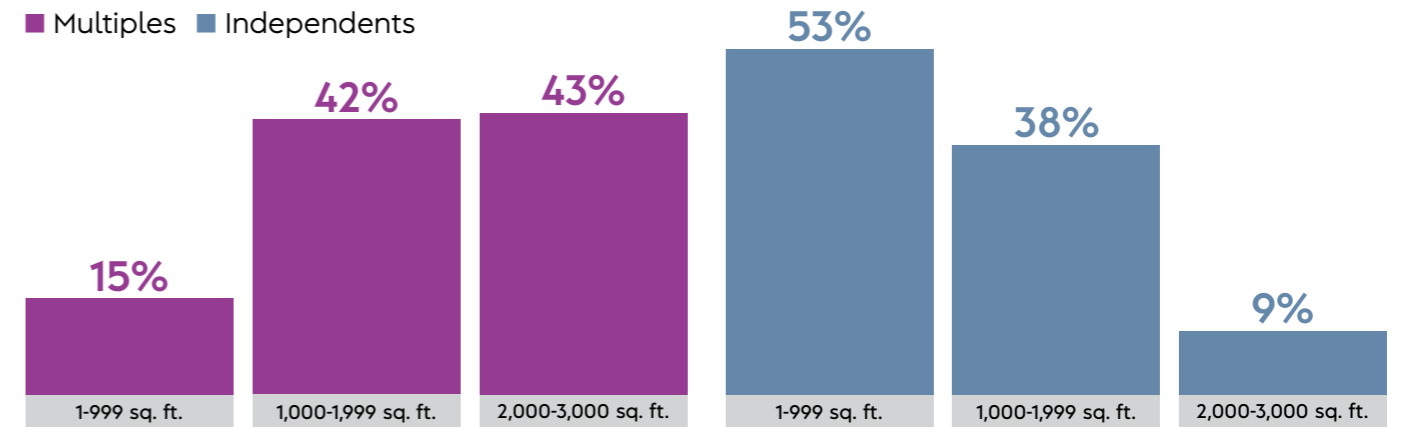
Opening hours



Premises ownership



Sales space



Source: ACS/Lumina Intelligence 2021

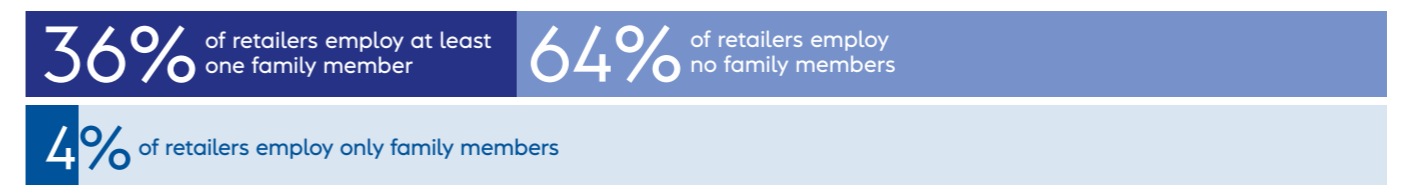
Source: ACS/Lumina Intelligence 2022

Business origin

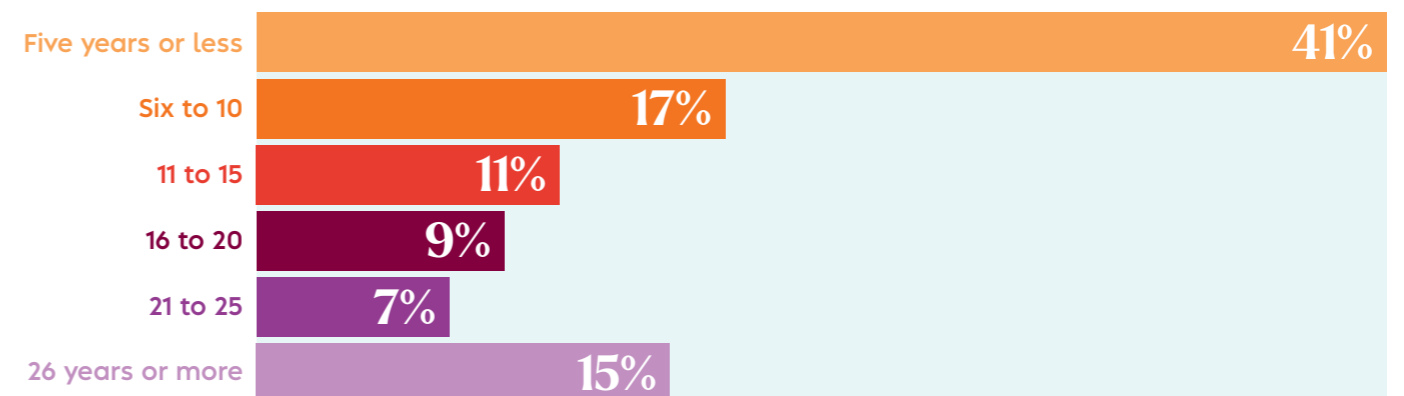


Source: ACS/Lumina Intelligence 2021

Employment of family members



Time in business



Rural convenience stores in mainland UK provide over **142,000 jobs**

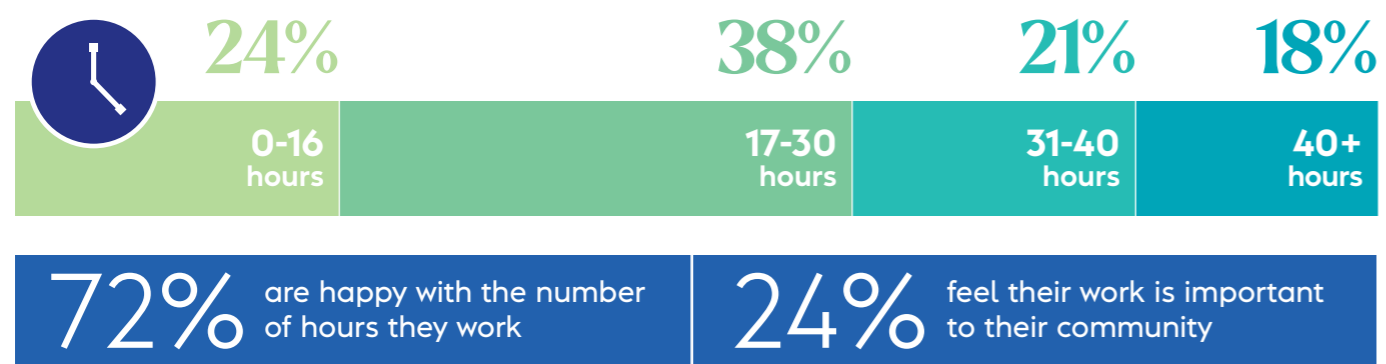
Colleagues in the convenience sector worked a combined **3.4m hours** over the last year

Source: ACS/Lumina Intelligence 2022

Colleagues in the convenience sector are:



Hours worked



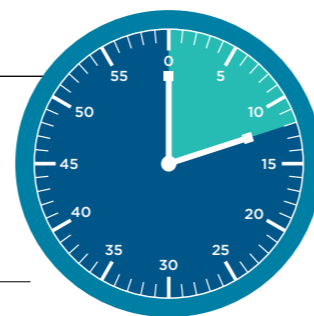
Travel to work

Average travel cost

£2.55 per day

Average travel time

12 minutes

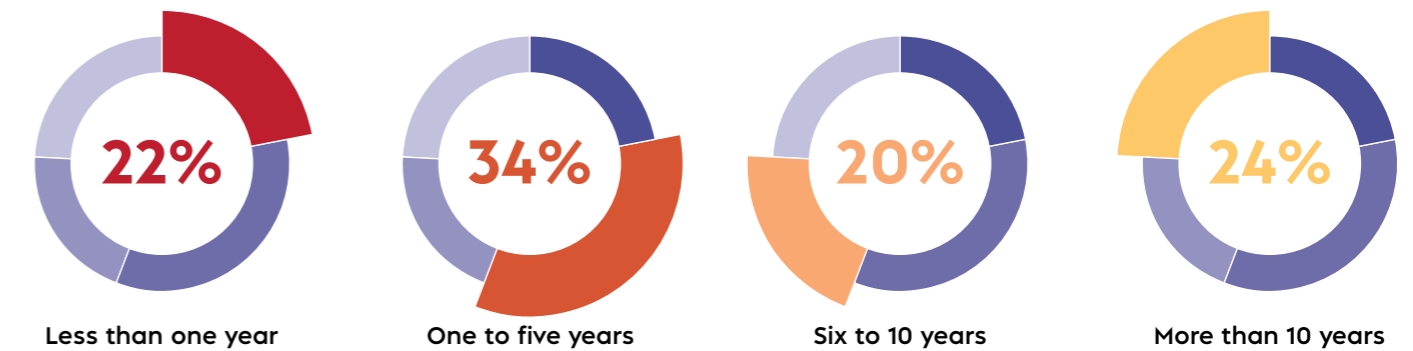


Mode of travel to work

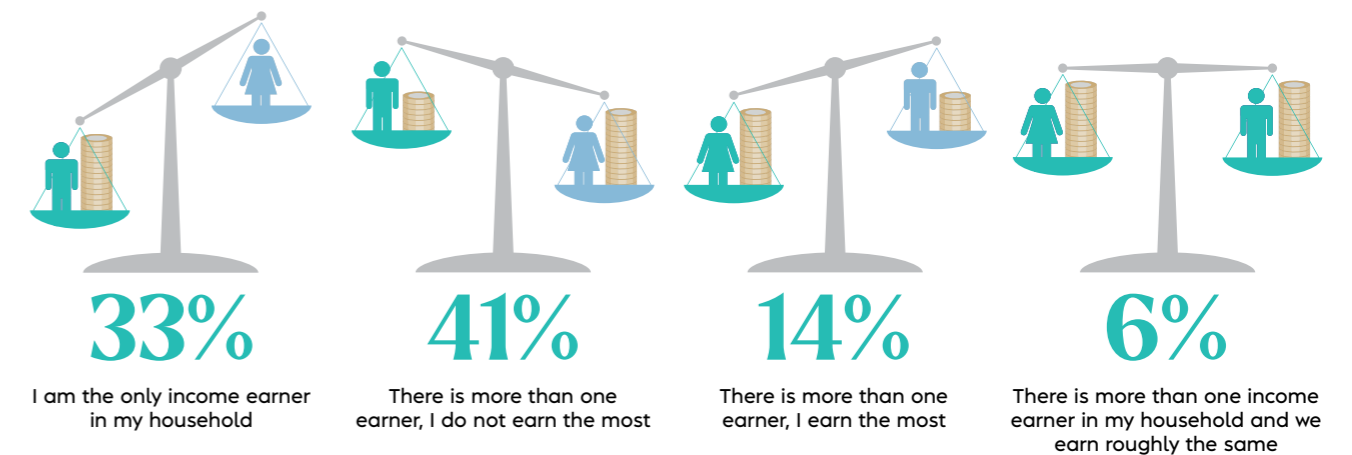


65% are satisfied with their job **96%** are employed on a permanent contract

Length of employment



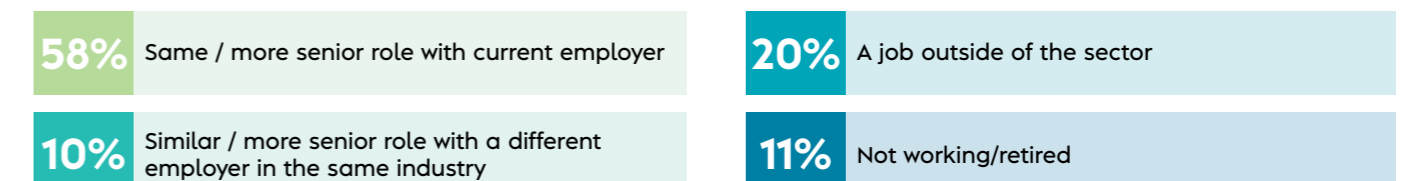
Contribution to household income



Job security

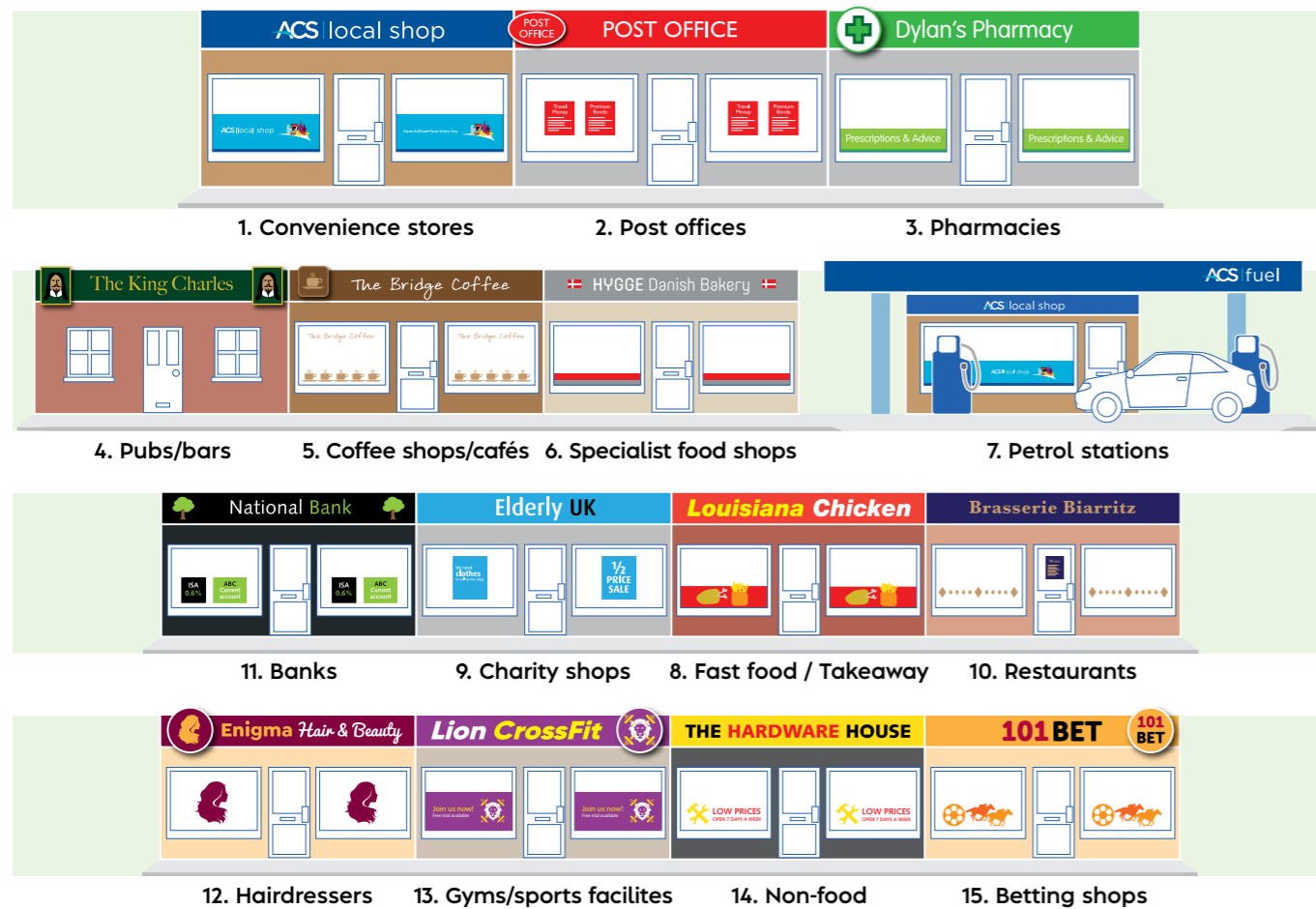


Future plans

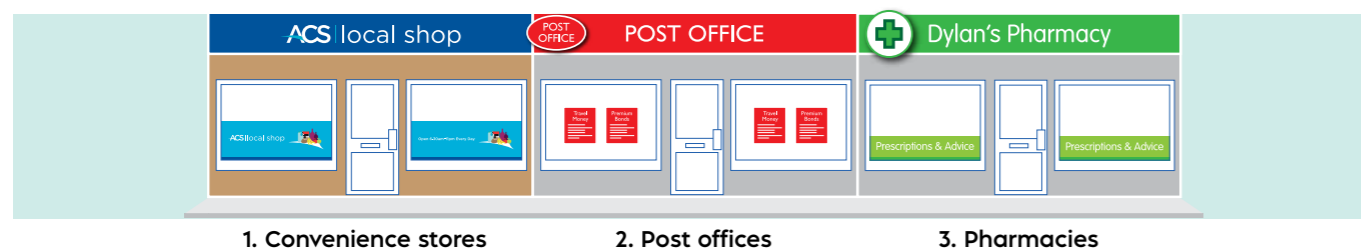


(UK figures)

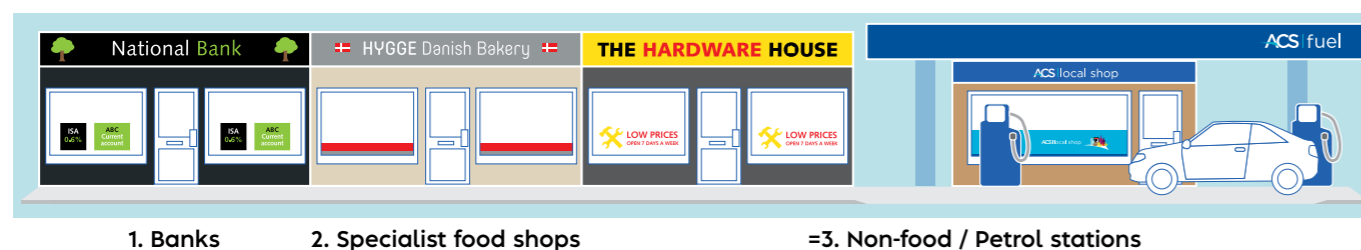
Most positive impact on the local area



Top three most essential rural services



Top three most wanted rural services

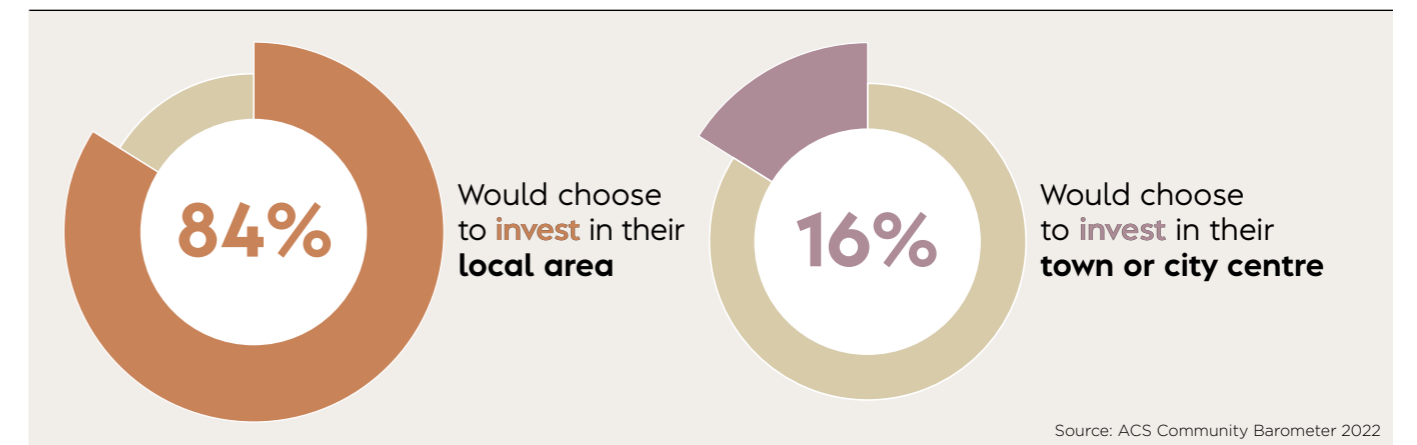


Community activity



Source: ACS Voice of Local Shops polling February 2022 - November 2022

If consumers were given a fund to invest in their local neighbourhood or town/city centre



Source: ACS Community Barometer 2022

Community owned shops



Source: Plunkett Foundation 2021

Source: Plunkett Foundation 2022

Methodology

ACS Rural Shop Report draws on data from the ACS Local Shop Report 2022.

New primary data for the Local Shop Report was undertaken by ACS in the form of two surveys:

1. Independent Retailer Survey – A sample of 2,124 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 by BCC Marketing 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. Rural data refers to a sample of 993 respondents who reported that they operate in a 'rural area'.

2. Multiple Retailer Survey – ACS conducted an online survey of its multiple chain members. This survey was based on the questions asked in the Independent Retailer Survey, where relevant, to ensure consistency and accuracy of results. This survey returned results relating to a sample of 5,600 stores.

The results of these two surveys have been collated and figures for independents and multiples have been combined according to the proportion of stores in the market, in order to determine overall results for the sector.

William Reed Business Media (WRBM) – Store numbers and sector data
WRBM continually updates data through re-registering customers thereby adding changed recipients, closures and new stores. This is through postal, telephone research, online delivery and events, plus the ongoing work of the editorial teams on its brands Convenience Store, Forecourt Trader and The Grocer.

ACS Economic Report

ACS commissioned Retail Economics to provide an economic overview of the convenience sector in 2018. ACS have updated the figures for 2023 based on revised data.

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.

Community Barometer

Yonder 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

ACS Voice of Local Shops

A telephone survey with a sample of 1,100 independent retailers, covering the nine regions of England, along with Wales and Scotland. The sample consists of unaffiliated, symbol group and forecourt independents which are represented in the survey in the same proportion as they are in the market. This survey runs three times a year, with Lumina Intelligence aiding in the design and delivery of the survey.

ACS Investment Tracker – Data obtained in the form of two surveys:

ACS Voice of Local Shops survey – Questions are asked relating to the amount retailers have invested over the past quarter, what they have invested in and how they have funded their investments.

Multiples Investment Tracker survey – A sample of over 3,000 multiple stores in the UK. Questions in the Multiple Investment Tracker survey are based on the questions asked in the Voice of Local Shops survey, where relevant, to ensure consistency of results.

The results of these two surveys are collated and combined according to the proportion of independent and multiple stores in the sector. The ACS Investment Tracker is completed three times a year and an average has been taken across the 2022's surveys (February 2022 to November 2022).

ACS Colleague Survey

An online and paper survey with a sample of 11,354 staff working within the convenience sector. The fieldwork was conducted between 14th December 2021 and 4th March 2022. The data in this report excludes store managers and refers to a sample of 4,075 colleagues working in rural areas. Store managers have been excluded from the analysis to be consistent with previous reports. For more Colleague Survey results please visit the ACS website or email rosie.wiggins@acs.org.uk

Community Shops – Plunkett Foundation

The number of community owned shops is obtained from the Plunkett Foundation database.

All other data on community shops is obtained from the Plunkett Foundation report 'Community Shops 2022'. The report is based on statutory data sourced from the Financial Conduct Authority and Companies House; electronic questionnaires and follow up telephone surveys; together with information held by Plunkett on every community shop.

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. These sources are referenced alongside the relevant sections of the report, and those organisations are:



Contacts

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Follow us on Twitter: [@ACS_Localshops](https://twitter.com/ACS_Localshops)

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