



# The **Welsh** Local Shop Report 2021

A report by the Association of Convenience Stores

#LSRWales

**ACS** | the voice of  
local shops



## » INTRODUCTION

There are **46,955** convenience stores in mainland UK

**2,967** of these stores are in **Wales**

**Wales has more shops per head** than any other part of mainland UK

Source: WRBM 2020

The Welsh Local Shop Report provides an overview of the Welsh convenience sector, looking at where stores trade, the colleagues we employ, our contribution to the economy and the essential role we play in local communities. The information in this report is gathered from our own primary research with independent and symbol group retailers, in addition to multiple and cooperative businesses, and support from secondary sources. While this report is intended to look at the normal conditions of a store in 2021, some of the figures have been influenced by Covid-19. For more information about the definitions of the wider UK convenience sector, please see ACS' Local Shop Report 2020.

Over the last year, convenience stores in Wales have:

Achieved **£2.8bn** in sales<sup>1</sup>

Contributed **£638m** in GVA<sup>2</sup>

Provided **26,271** jobs<sup>3</sup>

<sup>1</sup> Source: Lumina Intelligence 2020. <sup>2</sup> Source: ACS calculation based on Retail Economics 2020. <sup>3</sup> Source: ACS/Lumina Intelligence 2020

## Investment

Over the last year convenience stores in Wales have **invested** over **£30m** in their businesses

**80%** of fund investments from **own reserves**

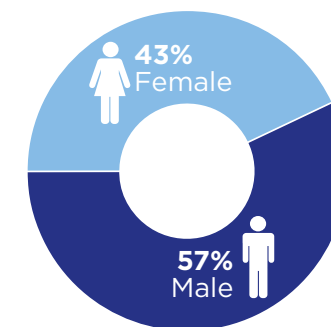
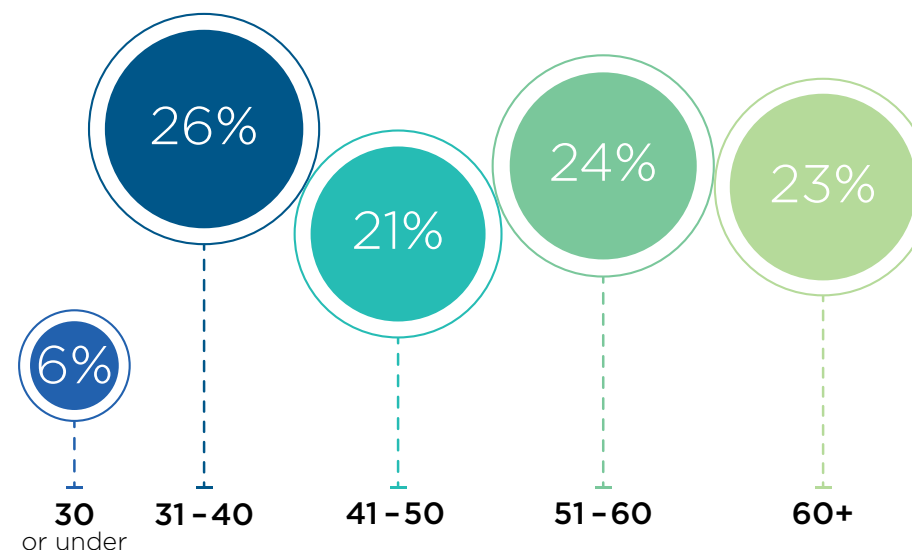
**Refrigeration** is the most common area of investment

## » WHO WE ARE

**88%**\* of convenience stores in Wales are independently owned

**22%** have been in the business for more than 25 years

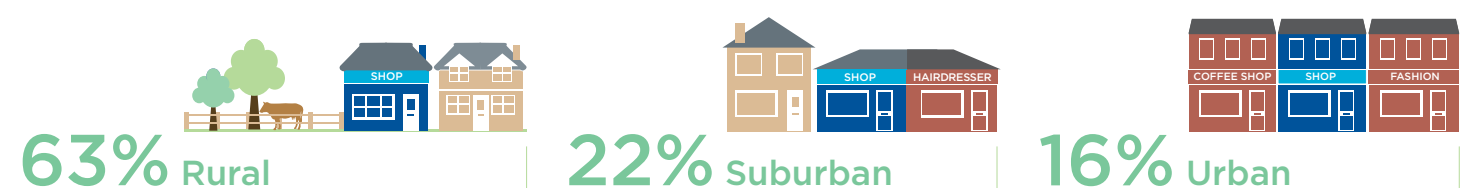
The people who own and run stores are:



White British	80%
Asian or Asian British	19%
Other	1%

Source: ACS/Lumina Intelligence 2020. \* Source: WRBM 2020

## Location



Source: WRBM 2020

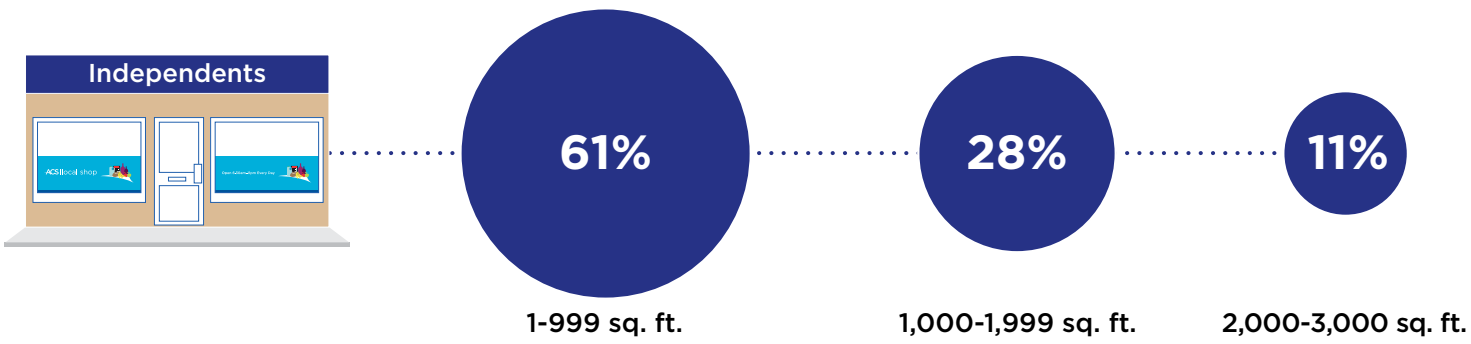
## Neighbouring businesses



Source: ACS/Lumina Intelligence 2020 (independents only)

# » HOW WE OPERATE

## Sales space



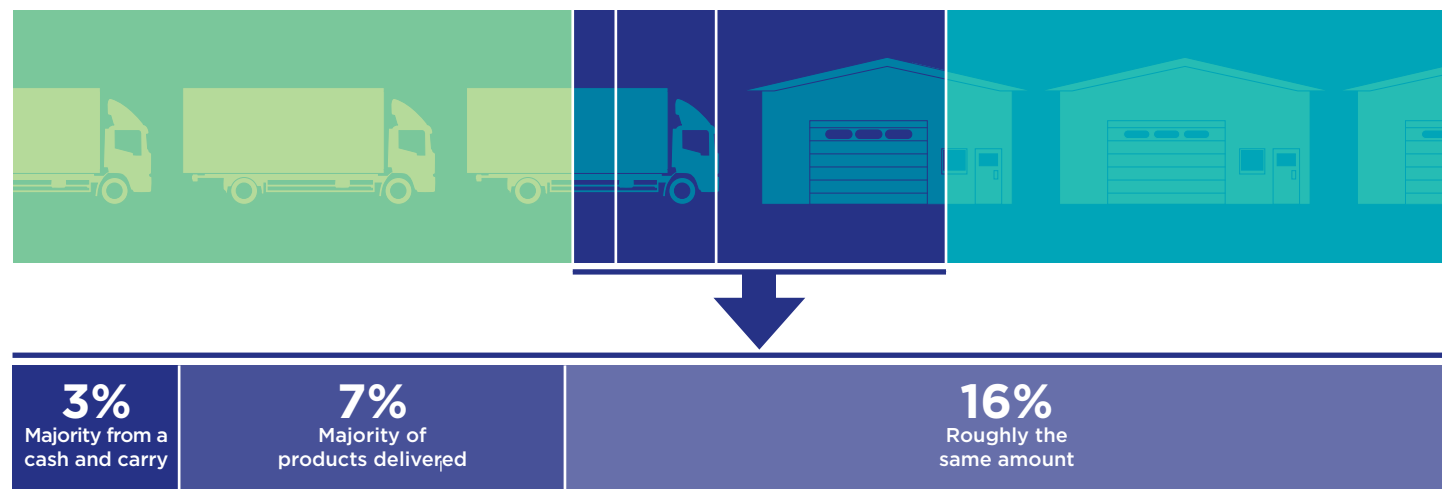
## Premises ownership



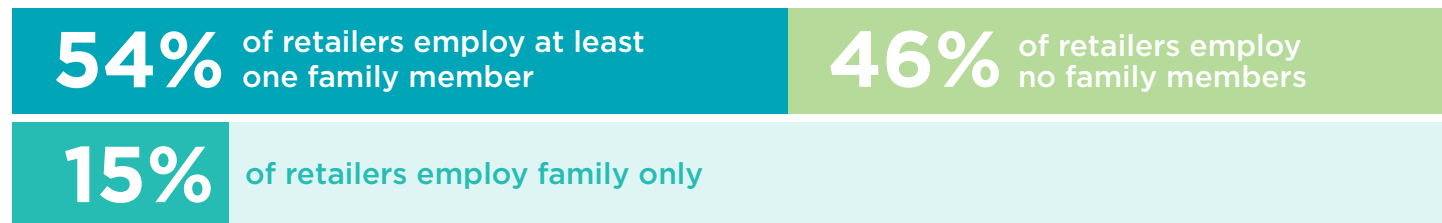
## Average opening hours



## How independent retailers source their products



## Employment of family members

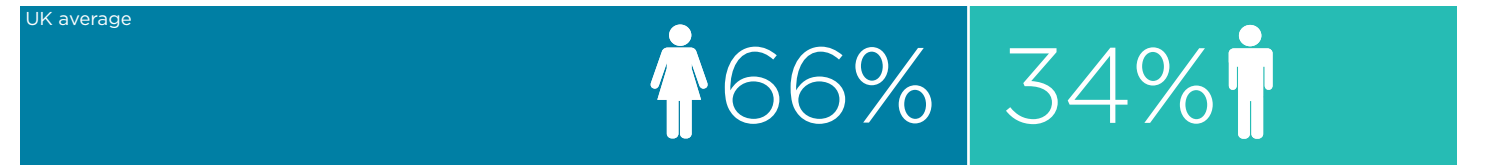


# » OUR COLLEAGUES

Convenience stores provide **26,271** jobs in Wales

Source: ACS/Lumina Intelligence 2020

## Colleagues in the convenience sector are:

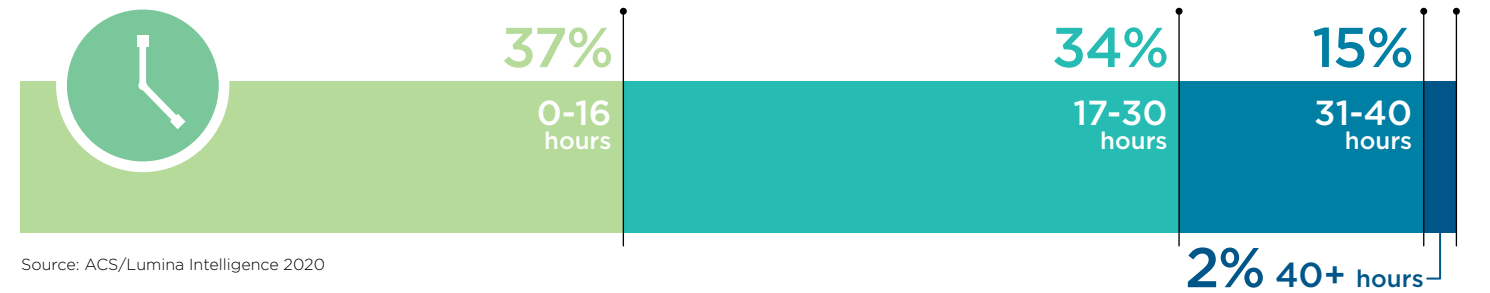


Source: ACS Colleague Survey 2020



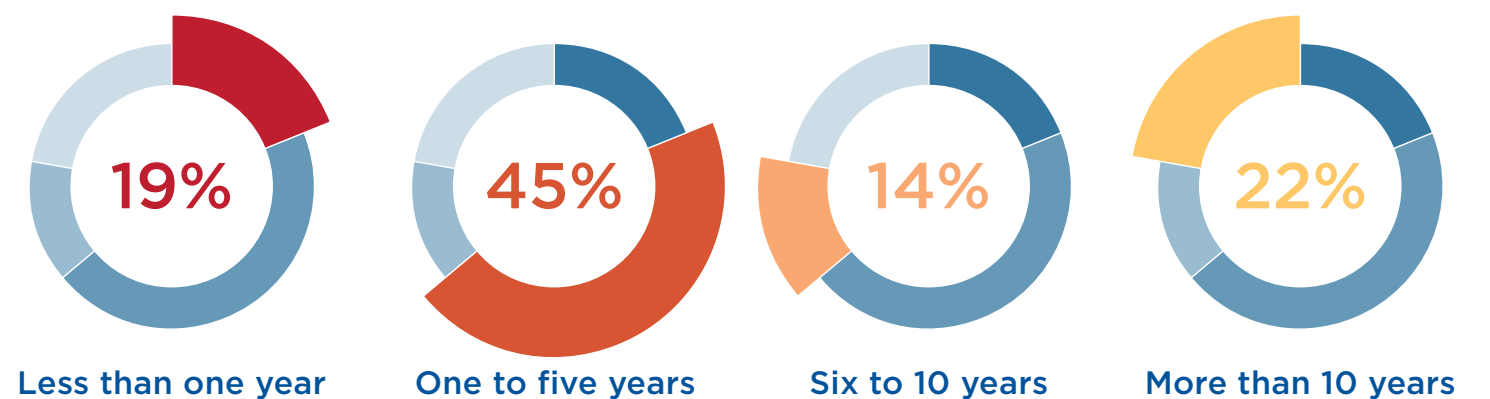
Source: ACS/Lumina Intelligence 2020

## Hours worked



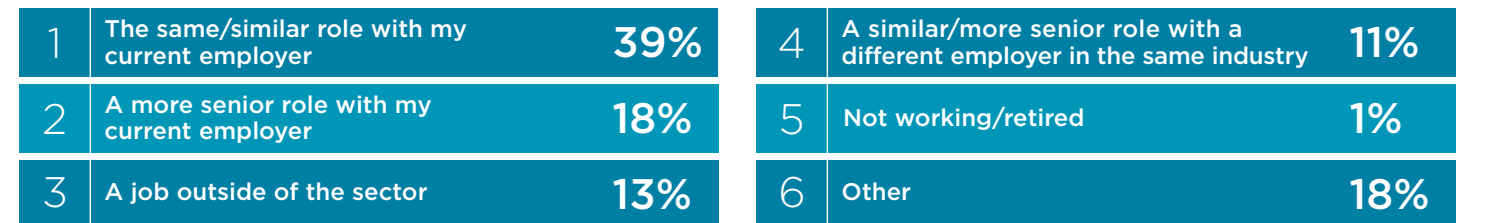
Source: ACS/Lumina Intelligence 2020

## Length of employment



Source: ACS/Lumina Intelligence 2020

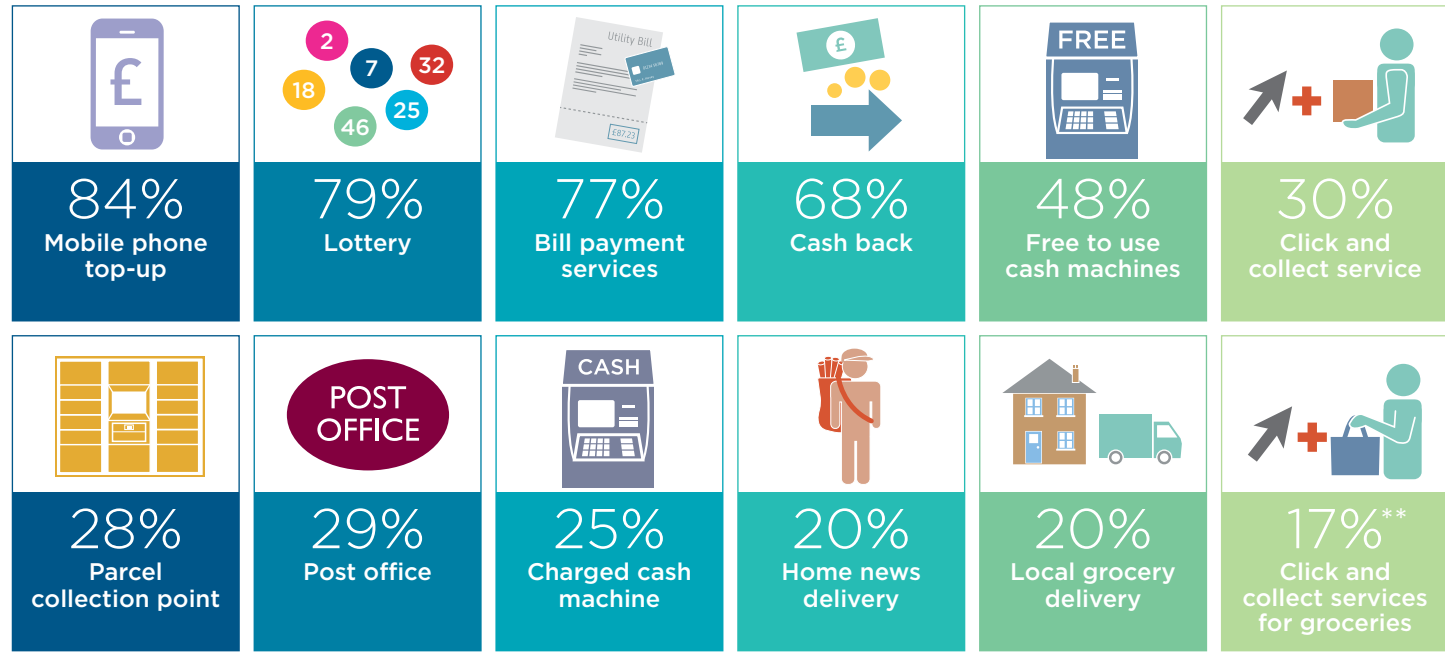
## Future plans



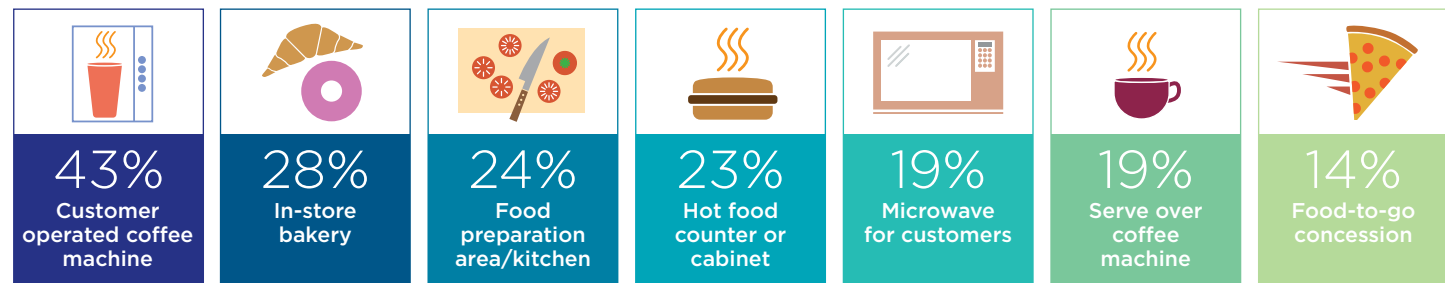
Source: ACS Colleague Survey 2020 (UK average)

# » TECHNOLOGY AND SERVICES

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

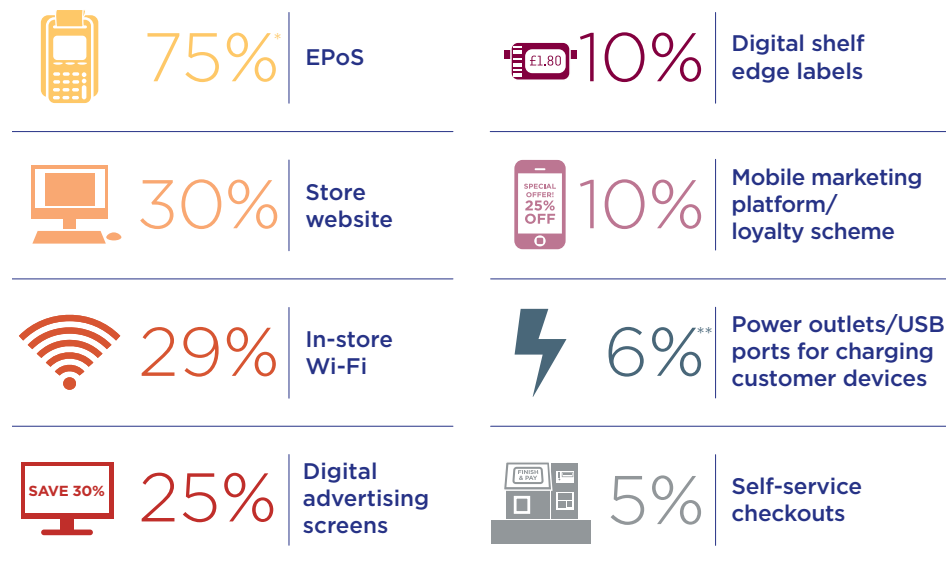


## Food service



## Technology

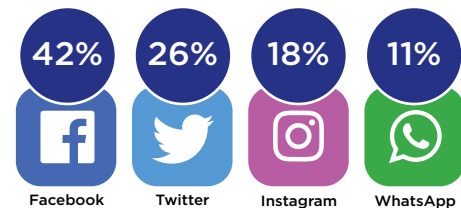
The percentage of stores in the Welsh convenience sector that have each of the following are:



## Payment methods



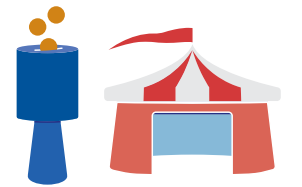
## Social media



90%\* of stores have CCTV

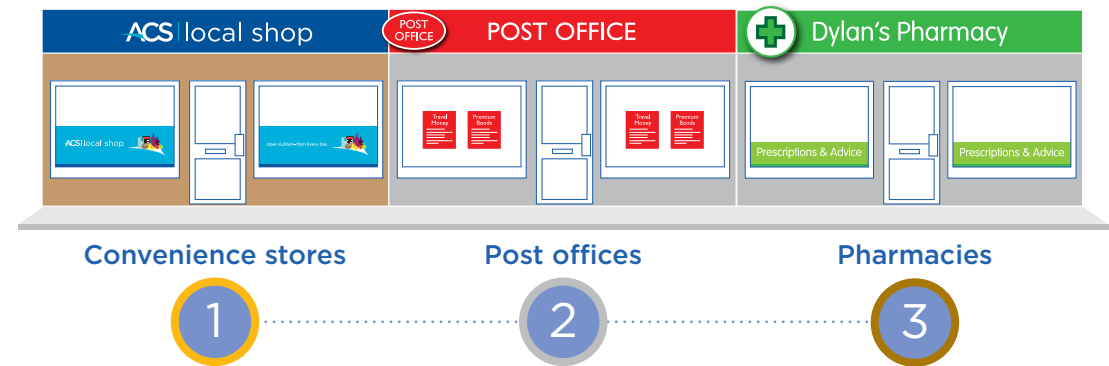
# » WHO WE SERVE

88% of independent retailers engaged in some form of community activity in the past year



Source: ACS VOLS 2019/2020

## Most positive impact on the local area



## Top three most wanted services



Source: ACS Community Barometer 2020

## Customers

The average customer in Wales visits their local store

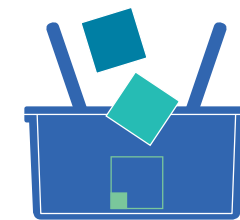
4.20 times per week

44% of shoppers in Wales drive to store... versus 41% UK average

Average distance travelled 2.20 miles

1.50 MILES UK average

The average basket size is 2.1 items



The average spend is

£7.63

Average age is: 48

51%

49%

ACS Welsh Local Shop Report draws on data from the ACS Local Shop Report 2020.

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 2,431 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 13<sup>th</sup> June and 29<sup>th</sup> July 2020. 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. The data in the report refers specifically to 147 independent respondents in Wales.

**2. Multiple Retailer Survey** – ACS conducted an online/paper 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 6,700 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.

#### **Convenience Tracking Programme 2020 –**

##### [Lumina Intelligence](#)

This programme is a survey of over 20,000 convenience shoppers conducted at the 'moment of truth' in-store.

#### **Community Barometer –**

##### [Populus](#)

Populus surveyed a nationally representative online sample of 2,068 UK adults aged 18+, between 10<sup>th</sup> and 13<sup>th</sup> January 2020. Respondents were surveyed using a questionnaire designed by ACS.

For more Community Barometer results please visit the ACS website or email [phoebe.clifford@acs.org.uk](mailto:phoebe.clifford@acs.org.uk)

#### **ACS Voice of Local Shops**

A quarterly telephone survey with a sample of 1,211 independent retailers, covering the nine regions of England, along with Wales and Scotland. Welsh data refers specifically to 69 independent retailers in Wales. 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. Lumina Intelligence aid 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 2,000 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 every quarter and an average has been taken across the latest four quarters (November 2019 to August 2020).

#### **ACS Colleague Survey**

An online and paper survey with a sample of 2,078 staff working within the convenience sector. The fieldwork was conducted between 20<sup>th</sup> January to 24<sup>th</sup> February 2020. The data in this report excludes store managers and refers to a sample of 1,173 colleagues. 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 [phoebe.clifford@acs.org.uk](mailto:phoebe.clifford@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. These sources are referenced alongside the relevant sections of the report, and those organisations are:

**Lumina**  
Intelligence

**Populus**

**RetailEconomics**

**William Reed**  
INFORMING BUSINESS GROWTH

## CONTACTS

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For more details on ACS: Visit: [www.acs.org.uk](http://www.acs.org.uk) Call: 01252 515001

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