The **Welsh Local Shop** Report 2019

A report by the Association of Convenience Stores

#LSRWales

the voice of local shops

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CONTENTS

INTRODUCTION

The Welsh Local Shop Report provides a comprehensive picture of the convenience sector in Wales, including detail on the stores themselves, the people who own and run stores and the communities in which they trade.

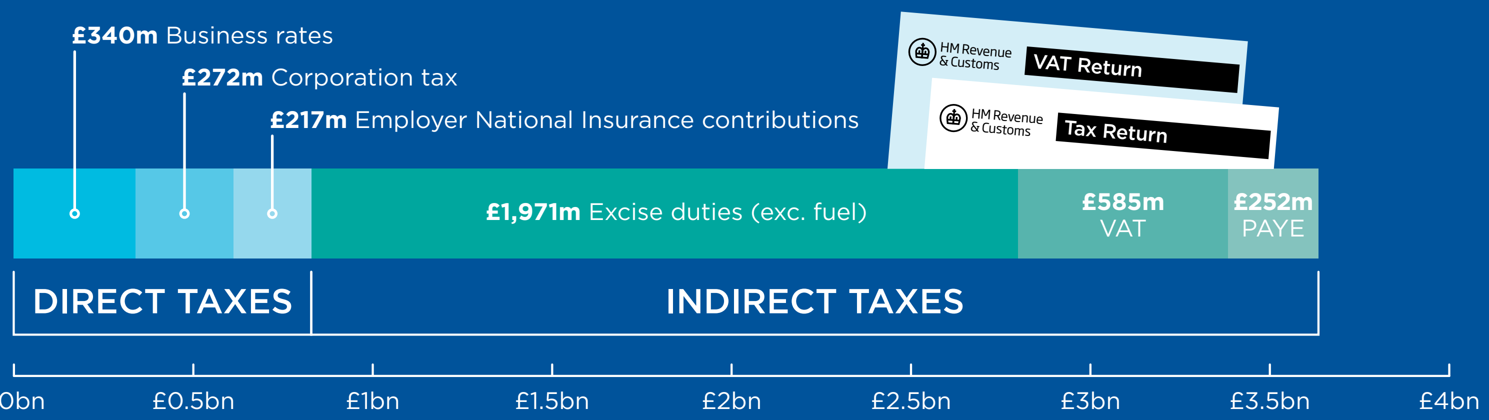
The Welsh Local Shop Report highlights the unique challenges that convenience stores in Wales face, especially in areas like service provision, rural/urban split and population density. The information in this report is gathered from our own primary research, surveying 220 independent retailers in Wales in addition to multiple and co-operative businesses across the UK representing over 7,500 stores. The report also draws on data kindly supplied by HIM, IGD, Plunkett Foundation and William Reed.

Some of the figures in the report have been scaled to reflect the entire Welsh convenience sector. Detailed information about the methodology and calculations in the report can be found on pages 22-23.

ECONOMIC CONTRIBUTION

OVER THE LAST YEAR, **THE UK CONVENIENCE SECTOR CONTRIBUTED**

OVER **£8.8bn** IN GVA & OVER **£3.6bn** IN TAXES



Source: ACS / Retail Economics 2018 (UK data)

THERE ARE **2,923** CONVENIENCE STORES IN WALES

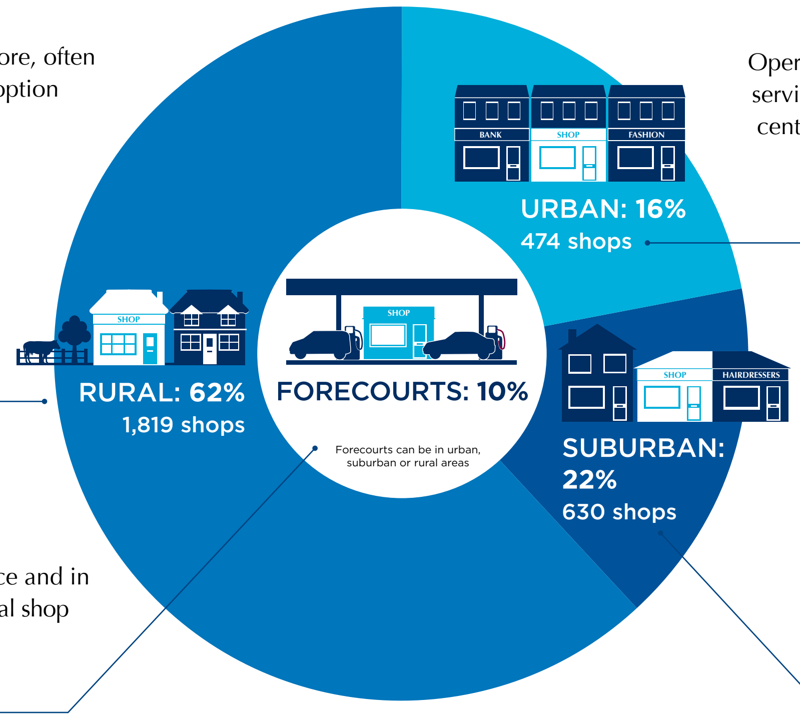
LOCATION

RURAL

A 'traditional' convenience store, often providing the only shopping option for the local community.

URBAN

Operating as part of a mix of stores serving the needs of those living in centres and the shopping needs of workers and residents.



FORECOURTS

In some locations providing an important commuter service and in others providing the main local shop for the whole community.

SUBURBAN

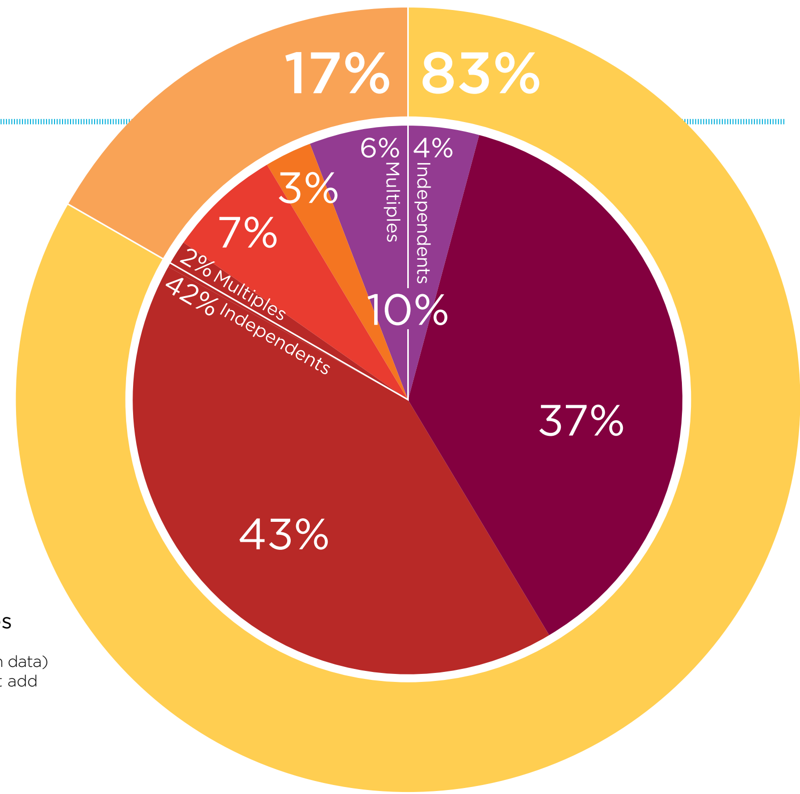
Providing a focal point for suburban communities and estates sometimes standalone or alongside a small number of other local services.

Source: WRBM 2018 (Welsh data)

SHOP OWNERSHIP

The vast majority of shops in the Welsh convenience sector are owned and operated by small businesses. Together, independent retailers make up 83% of the stores in Wales.

Convenience stores operating on petrol forecourts are an important part of the market with a combination of multiple owned and run stores and independently owned and run stores making up 10% of the Welsh convenience sector. More information about forecourts can be found in the ACS Forecourt Report.



- Unaffiliated independents
- Symbol groups
  - Independents
  - Multiples
- Multiples
- Co-operatives
- Forecourts
  - Independents
  - Multiples
- Small businesses
- Multiple chains and co-operatives

Source: WRBM 2018 (Welsh data) Internal segments may not add up due to rounding

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» 2019 HIGHLIGHTS

» SHOPS

THERE ARE 2,923 CONVENIENCE STORES IN WALES

83% OF WELSH CONVENIENCE STORES ARE RUN BY INDEPENDENT RETAILERS

81% OF WELSH INDEPENDENT RETAILERS TRADE WITH LESS THAN FIVE OTHER RETAIL/ SERVICE BUSINESSES CLOSE BY

65% OF WELSH INDEPENDENT STORES ARE SMALLER THAN 1,000 SQUARE FEET

» SALES

TOTAL VALUE OF WELSH SALES £2.5bn (in the convenience sector in the year to March 2018)

TOTAL VALUE OF UK SALES £39.1bn

OPENING TIME: AM

CLOSING TIME: PM

Typical convenience stores in Wales are open **7am until 10pm**

8% of stores in Wales are open 24 hours

» INVESTMENT

TOP FIVE AREAS OF INVESTMENT

- Refrigeration 39%
- Internal building maintenance 30%
- Shelving 23%
- In-store lighting 18%
- Till systems (e.g. EPoS) 11%

OVER THE LAST YEAR CONVENIENCE STORES IN WALES HAVE INVESTED » £44m IN THEIR BUSINESSES

76% of independents in Wales are funding investment from their own reserves

» TECHNOLOGY & SERVICES

79% of stores in Wales offer contactless payment

Parking	55%
Free to use cash machine	48%
Parcel collection point	36%

81% of stores in Wales have an alcohol licence

» JOBS

CONVENIENCE STORES IN WALES PROVIDE ALMOST 23,000 JOBS

17% of stores in Wales only employ family members

35% of employees are the only income earner in their household

AVERAGE TRAVEL COST = £1.63 per day

AVERAGE TRAVEL TIME = 13 minutes

» ENTREPRENEURS

23% OF SHOP OWNERS IN WALES WORK MORE THAN 70 HOURS PER WEEK

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

68% Started business | 32% Inherited family business

26% ARE UNDER THE AGE OF 40

» COMMUNITIES

81% of independent Welsh retailers **engaged** in some form of **community activity** in the past year

58% of carrier bag donations went to a **local charity**

MOST POSITIVE IMPACT ON LOCAL AREA

1. Post offices
2. Convenience stores
3. Pubs

TOP THREE MOST WANTED SERVICES

1. Specialist food shops
2. Banks
3. Non-food

» CUSTOMERS

THE AVERAGE SPEND OF A CONVENIENCE SHOPPER IN WALES IS £5.99

81% of customers pay by cash

MODE OF TRAVEL TO STORES

- 49% Walk/on foot
- 47% Drive
- 2% Public transport
- 1% Other

41% of convenience store customers travel **less than ¼ mile** to their store

THE AVERAGE SHOPPER VISITS THEIR LOCAL WELSH STORE 3.3 times per week

See Methodology section (pages 22-23) for full source list

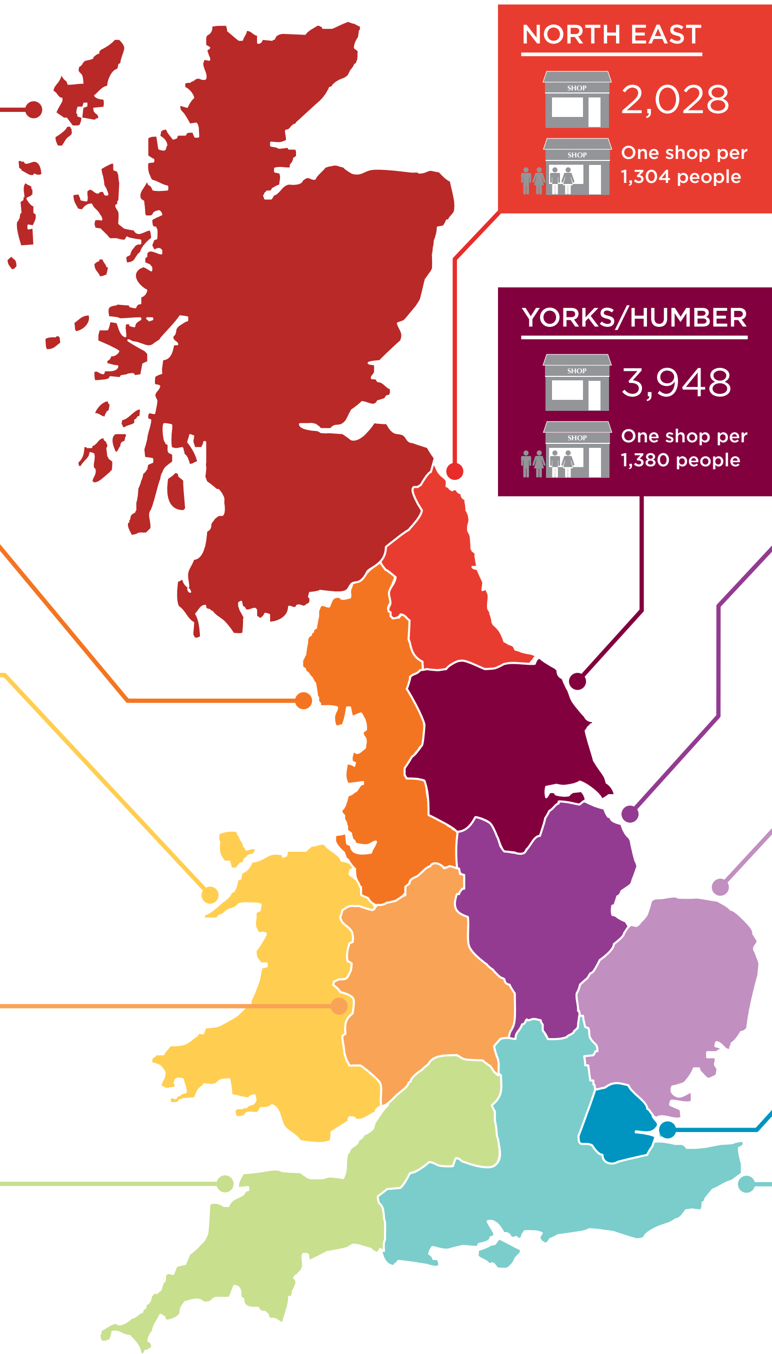
SHOPS

THERE ARE **2,923** CONVENIENCE STORES IN WALES

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

83% of Welsh convenience stores are run by **INDEPENDENT** RETAILERS

UK SHOP NUMBERS



		One shop per
SCOTLAND	4,962	1,093 people
NORTH EAST	2,028	1,304 people
ENGLAND TOTAL	38,377	1,449 people
NORTH WEST	5,048	1,438 people
YORKS/HUMBER	3,948	1,380 people
EAST MIDLANDS	3,500	1,363 people
WALES	2,923	1,069 people
EASTERN	3,918	1,575 people
WEST MIDLANDS	4,423	1,325 people
LONDON	5,765	1,531 people
SOUTH WEST	4,072	1,365 people
SOUTH EAST	5,675	1,600 people

All data on this page – source: WRBM 2018 and ONS 2017

SHOP SIZE

	1-999 sq. ft.	1,000-1,999 sq. ft.	2,000-3,000 sq. ft.
Multiples	28%	32%	40%
Independents	65%	26%	9%

Source: ACS/HIM 2018 (multiples based on UK average)

NEIGHBOURING BUSINESSES

ISOLATED STORE – 46%
No other retail/service businesses close by.

LOCATED ON A SMALL PARADE – 35%
Up to five retail/service businesses close by.

LOCATED ON A LARGER PARADE OR A HIGH STREET – 12%
Up to 10 retail/service businesses close by.

LOCATED ON A MAIN HIGH STREET OR WITHIN A CITY CENTRE – 7%
More than 10 retail/service businesses close by.

Source: ACS/HIM 2018 (independents only) (Welsh data)

PREMISES OWNERSHIP

Source: ACS/HIM 2018 (independents only) (Welsh data)

TOTAL VALUE OF WELSH SALES

£2.5bn

(in the convenience sector in the year to March 2018)

TOTAL VALUE OF UK SALES

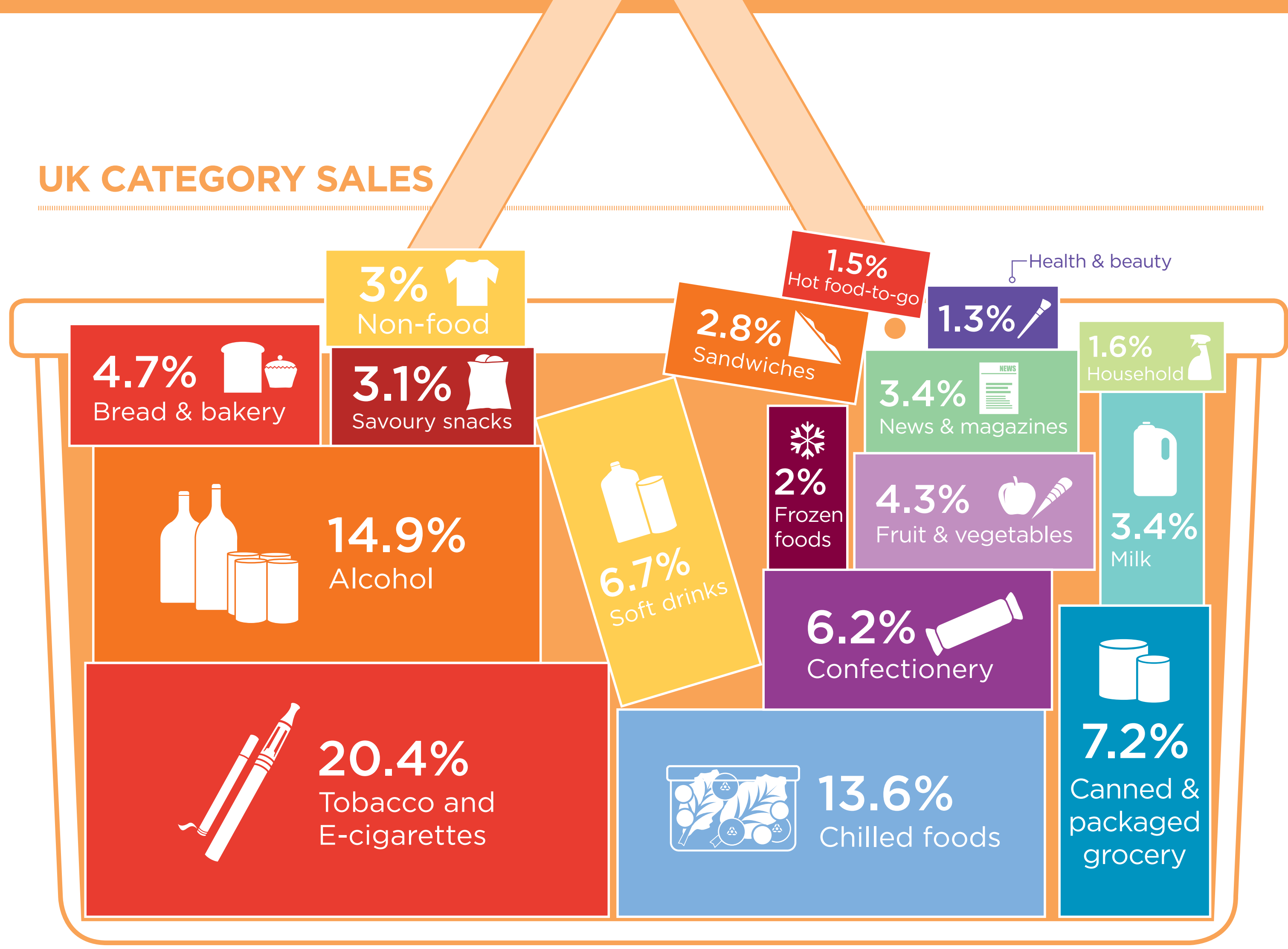
£39.1bn

UK TURNOVER GREW 2.9% BETWEEN 2017 AND 2018

SALES BY STORE TYPE (UK AVERAGE)

Market share	Store type
38.0%	Symbols
23.4%	Multiples
16.6%	Unaffiliated Independents
11.7%	Co-operatives
10.4%*	Forecourts

UK CATEGORY SALES



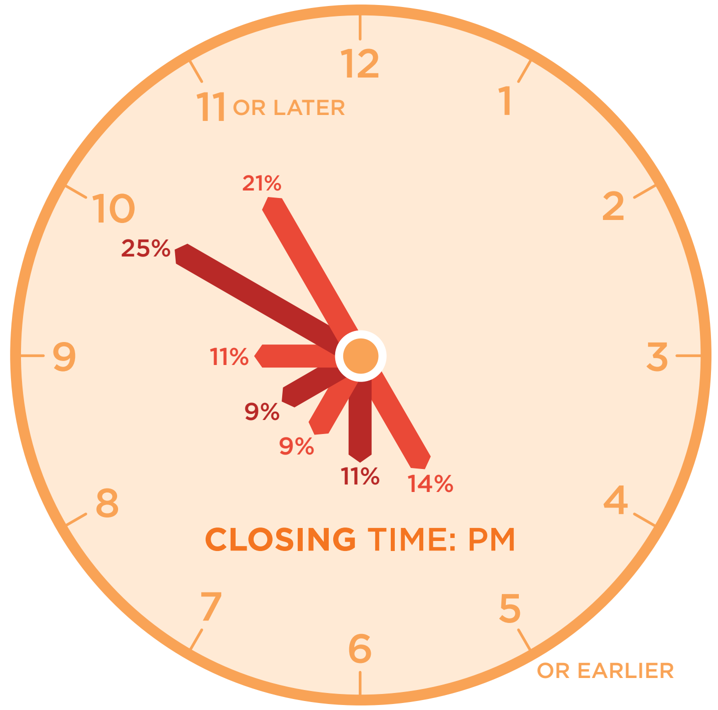
Source: IGD 2018 (UK data)

OPENING HOURS IN WELSH CONVENIENCE STORES

8% of stores are open 24 hours

2% of stores are closed on Sunday

Average number of **hours open** per day: Mon-Sat: 14.09 Sun: 12.54

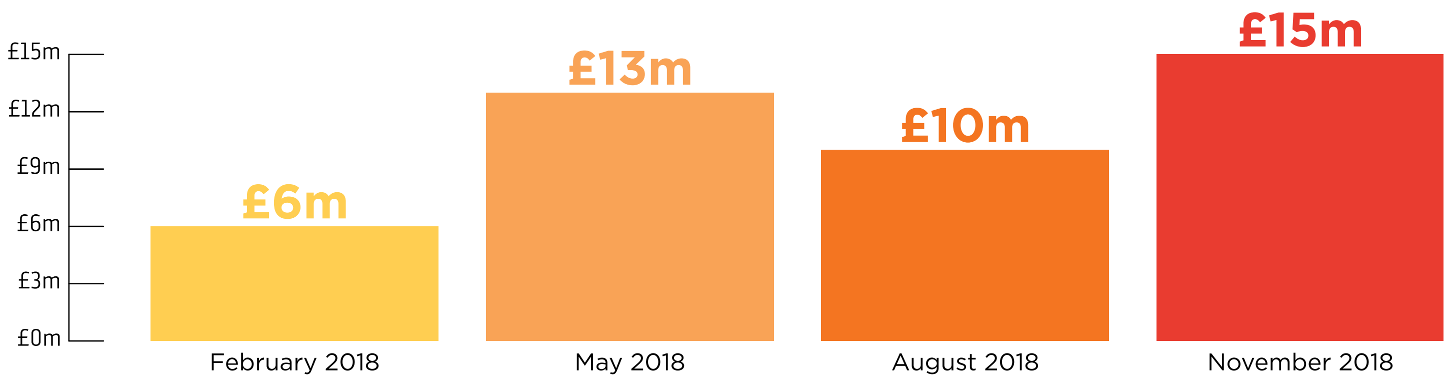


All data on this page – source: IGD 2018 (UK data)
* Forecourt sales excludes fuel

Source: ACS/HIM 2018 (Welsh data)

OVER THE LAST YEAR CONVENIENCE STORES IN WALES HAVE INVESTED » £44m IN THEIR BUSINESSES

INVESTMENT PER QUARTER



AVERAGE ANNUAL INVESTMENT BY STORE TYPE

Welsh unaffiliated independents: £7,241

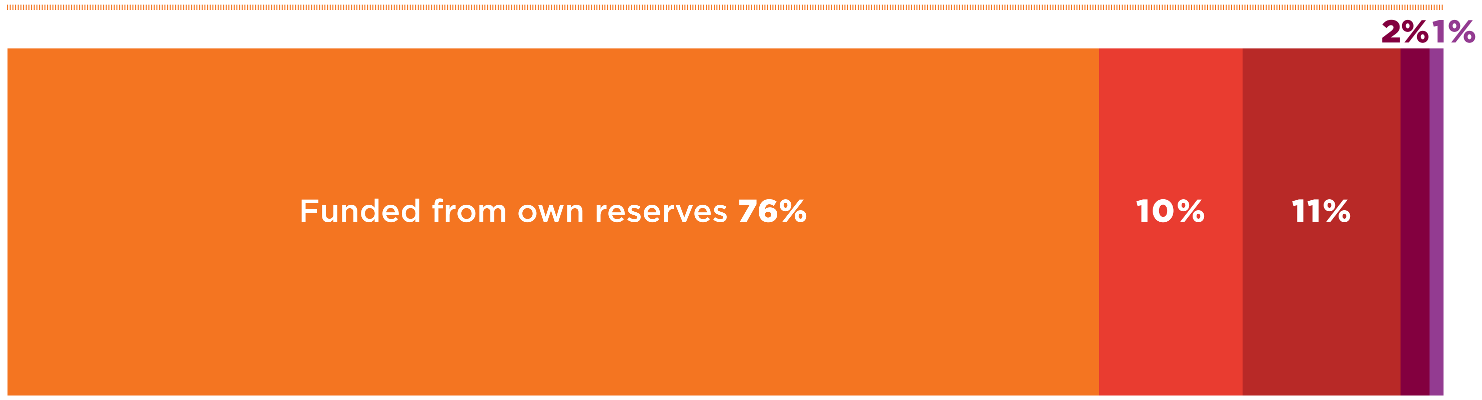
Welsh symbol retailers: £14,666

Multiples (UK): £35,699

PERCENTAGE OF STORES INVESTING

- 25% Welsh unaffiliated independents
- 20% Welsh symbol retailers
- 41% Multiples (UK)

SOURCES OF INVESTMENT



Key: Funded/provided by suppliers; Funded/provided by symbol group; Other business/wholesale funding; Financial institutions

AREAS OF INVESTMENT (OF THOSE INVESTING)

- Refrigeration **39%**
- Internal building maintenance **30%**
- Shelving **23%**
- In-store lighting **18%**
- Till systems (e.g. EPoS) **11%**
- Freezer space **11%**
- Store signage **11%**
- Air-conditioning **10%**
- Crime prevention measures **10%**
- Full store refits **6%**
- Internal building development **5%**
- Parking provision **3%**
- Improving store access **2%**

Source: ACS Investment Tracker 2018 (Welsh data)

AMOUNT OF REFRIGERATION

STORE SIZE	UP TO 5m	BETWEEN 5m & 10m	BETWEEN 10m & 15m	MORE THAN 15m
FOR STORES 1-999 sq. ft.	49%	31%	19%	1%
FOR STORES 1,000-1,999 sq. ft.	19%	35%	32%	15%
FOR STORES 2,000-3,000 sq. ft.	13%	22%	17%	48%

Source: ACS/HIM 2018 (Welsh data)

All data on this page - source: ACS Investment Tracker 2018 (Sources of Investment refers to independents only) (Welsh data unless stated UK data)

» TECHNOLOGY & SERVICES

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

Mobile phone top-up	86%
Lottery	83%
Bill payment services	67%
Cash back	64%
Wheelchair access	64%
Parking	55%*
Free to use cash machines	48%
Community noticeboard	43%
Wide aisles to improve accessibility	38%
Post office	29%
Plants or horticulture products	25%*
Home news delivery	22%
Loyalty card	22%
Local grocery delivery	20%
Charged cash machines	17%
Hearing aid loops	14%
Customer toilets	11%
Dry cleaning	7%
Photo booth	2%
Prescription collections	2%
Key cutting services	<1%

Licensing

Alcohol licence	81%
Late night refreshment licence	14%
Fireworks licence	8%

Parcel services

Click and collect service	39%*
Parcel collection point	36%*

Car wash

Jet wash (manual)	5%
Automatic machine car wash	4%
Hand car wash (attended)	2%

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ACS FARNBOROUGH
ACS.ORG.UK

FREEZER UNITS	79%
CUSTOMER OPERATED COFFEE MACHINE	34%
HOT FOOD COUNTER OR CABINET	22%
IN-STORE BAKERY	21%
FOOD PREPARATION AREA/KITCHEN	20%
MICROWAVE FOR CUSTOMERS	16%
RECYCLING BINS	13%
SERVE OVER COFFEE MACHINE	13%
FOOD-TO-GO CONCESSION E.G. SUBWAY/COFFEE SHOP	10%
SEATING AREAS	10%

DEBIT. PIN VERIFIED.
LOYALTY CARD POINTS EARNED: 14
POINTS BALANCE: 3741

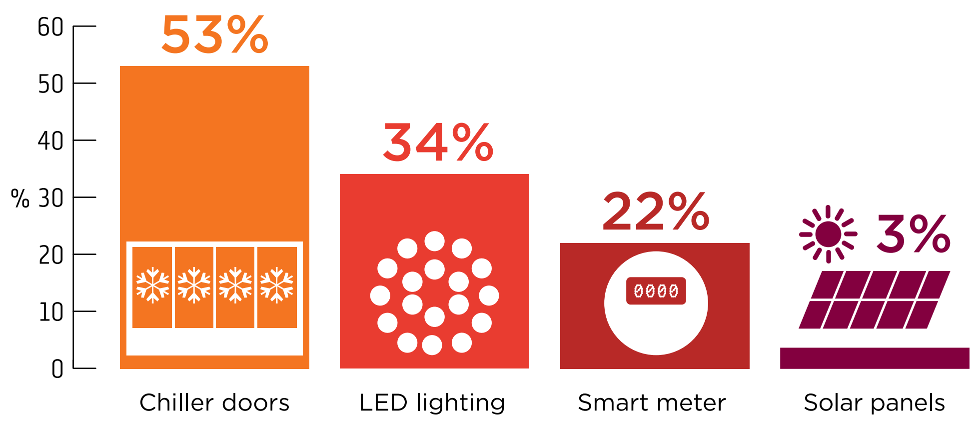
··· WE LOOK FORWARD TO YOUR NEXT VISIT ···

CCTV	84%
EPoS	68%
Facebook	33%
Store website	29%
Twitter	18%
Digital advertising screens	17%
In-store Wi-Fi	15%
Mobile marketing platform/loyalty scheme	8%
Digital shelf edge labels	7%
Instagram**	5%
Self-service checkouts	3%
WhatsApp**	2%

PAYMENT METHODS

92%	Debit card
86%	Credit card
79%	Contactless payment
64%	Mobile payment

ENERGY SAVING



All data on this spread - source ACS/HIM 2017/2018 except
* which are 2018 only. ** Independents only (Welsh data)

CONVENIENCE STORES IN WALES PROVIDE ALMOST 23,000 JOBS

Source: ACS/HIM 2018 (Welsh data)

32% of colleagues have childcare commitments outside of work

22% of colleagues care for other family members

76% of colleagues rate on the job training in their store as good or very good

On the job training is considered **the most valuable staff benefit**

72% OF COLLEAGUES ARE SATISFIED WITH THEIR JOB

TRAVEL TO WORK

→ AVERAGE TRAVEL COST

£1.63 per day

→ AVERAGE TRAVEL TIME

13 minutes

→ MODE OF TRAVEL TO WORK

- 55% Walk/on foot
- 32% Drive
- 10% Public transport
- 3% Other

FUTURE PLANS

1	35%	A similar role with my current employer
2	23%	A more senior role with my current employer
3	12%	A job outside of the sector
4	10%	A similar/more senior role with a different employer in the same industry
5	6%	Not working
6	14%	Other

CONTRIBUTION TO HOUSEHOLD INCOME

- **35%** I am the only income earner in my household
- **50%** There is more than one earner, I do not earn the most
- **8%** There is more than one earner, I earn the most
- **7%** There is more than one income earner in my household and we earn roughly the same

COLLEAGUES IN WALES

Male 27% | 73% Female

20% 16-24 years old

20% Over 60 years old

→ HOURS WORKED

- 0-16: 43%
- 17-30: 32%
- 31-40: 18%
- 40+: 7%

→ LENGTH OF EMPLOYMENT

	%
Less than one year	30%
One to five years	36%
Six to 10 years	15%
More than 10 years	19%

60% of retailers employ at least one family member

40% of retailers employ no family members

17% of retailers employ family only

ENTREPRENEURS

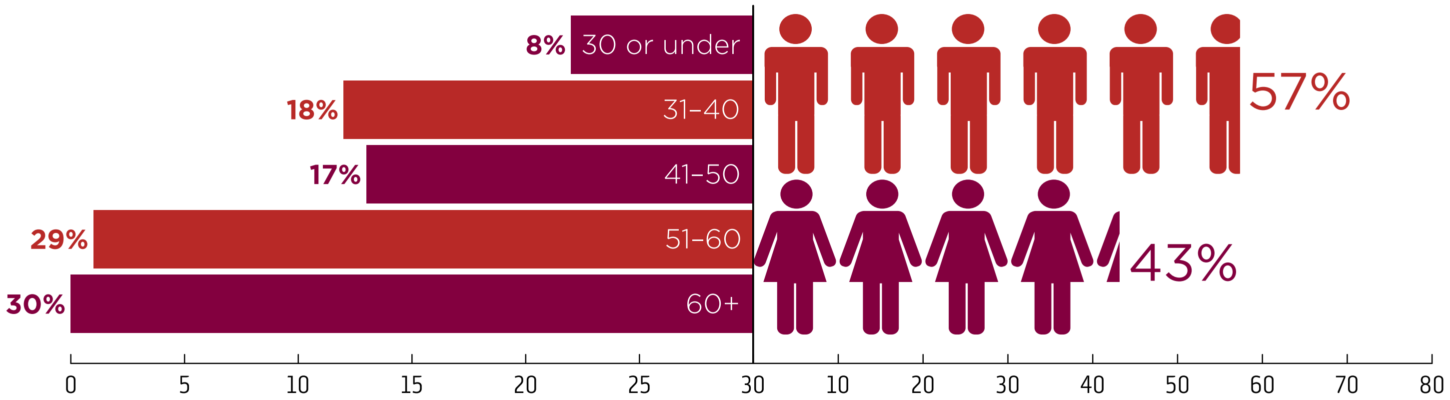
23% OF SHOP OWNERS IN WALES **WORK MORE THAN 70 HOURS PER WEEK**

22% take **no holiday** per year

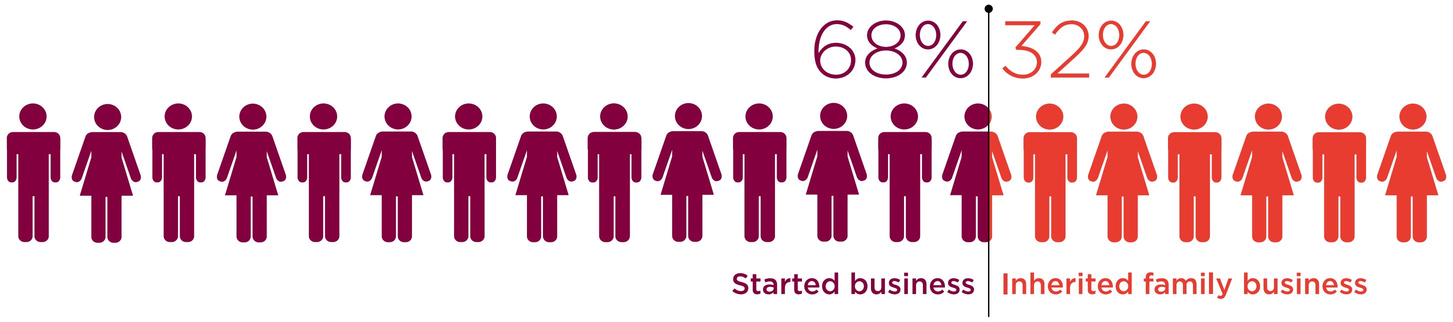
25% have been in the business **for more than 25 years**

41% OF BUSINESSES ARE OWNED **BY FAMILY PARTNERSHIPS**

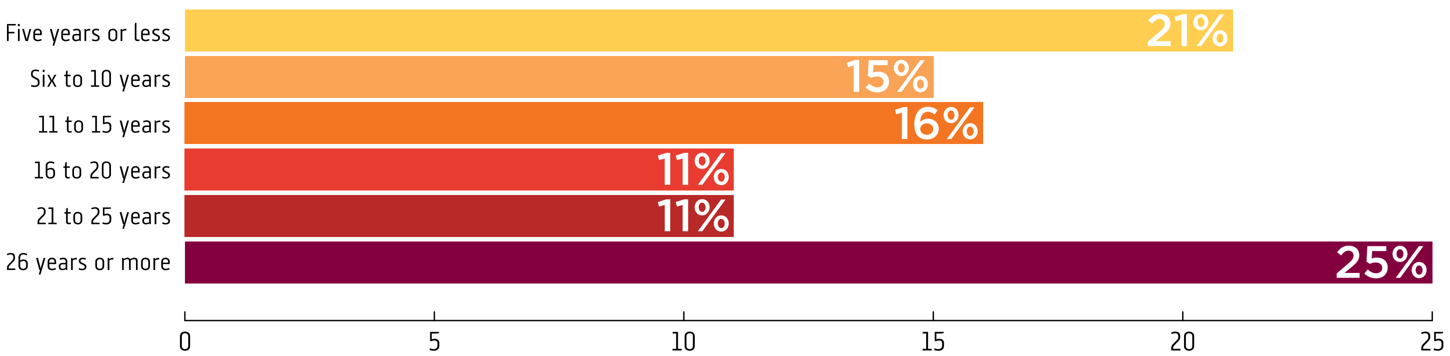
OWNERSHIP AGE AND GENDER



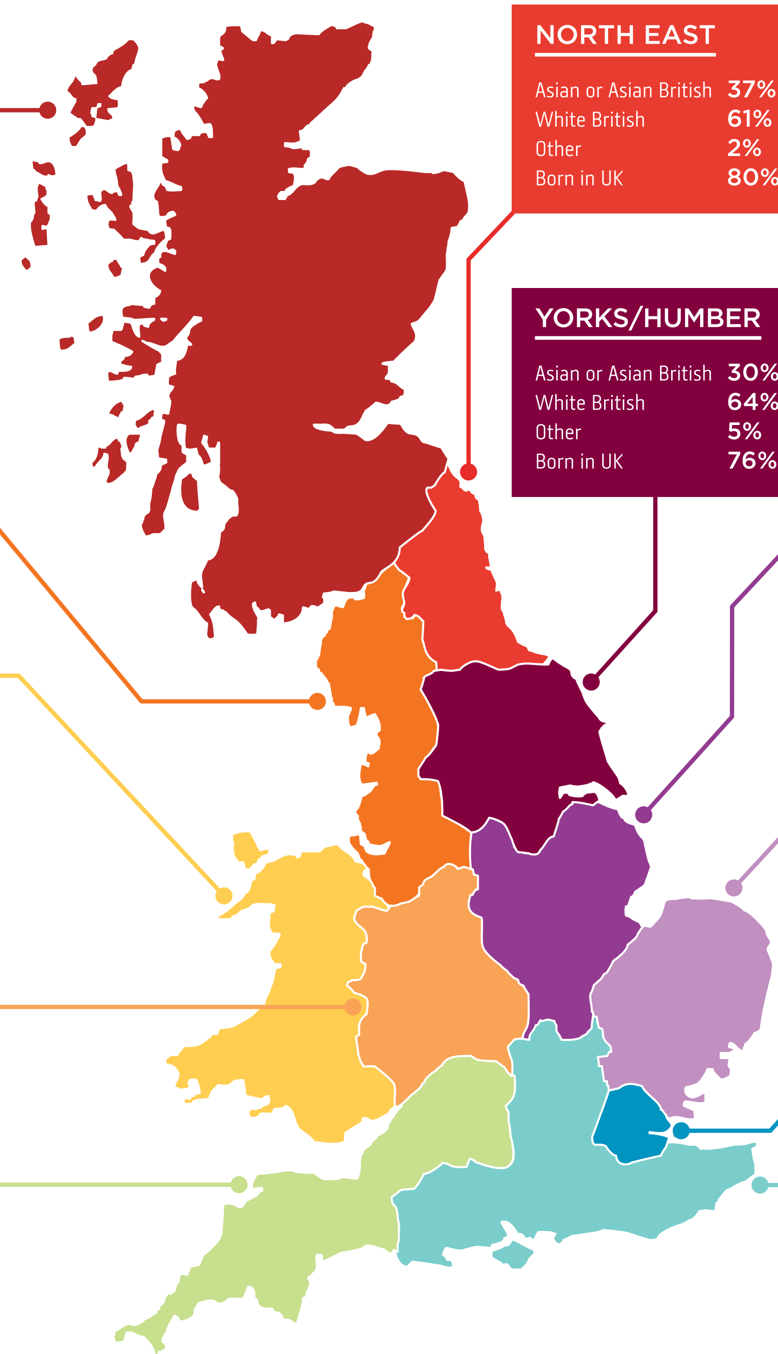
ENTRY TO THE SECTOR



TIME IN BUSINESS



ETHNICITY OF OWNERS



	Asian or Asian British	White British	Other	Born in UK
SCOTLAND	26%	62%	12%	80%
NORTH EAST	37%	61%	2%	80%
ENGLAND TOTAL	41%	53%	6%	67%
NORTH WEST	34%	59%	7%	72%
YORKS/HUMBER	30%	64%	5%	76%
EAST MIDLANDS	51%	44%	5%	59%
WALES	18%	74%	8%	81%
EASTERN	36%	59%	5%	67%
WEST MIDLANDS	58%	37%	5%	65%
LONDON	66%	25%	8%	40%
SOUTH WEST	11%	84%	5%	88%
SOUTH EAST	49%	43%	8%	57%

LANGUAGES SPOKEN IN WALES

27% of retailers in Wales speak Welsh

پنجابی
ਪੰਜਾਬੀ

8% of shop owners speak **Punjabi**

हिन्दी

4% of shop owners speak **Hindi**

ગુજરાતી

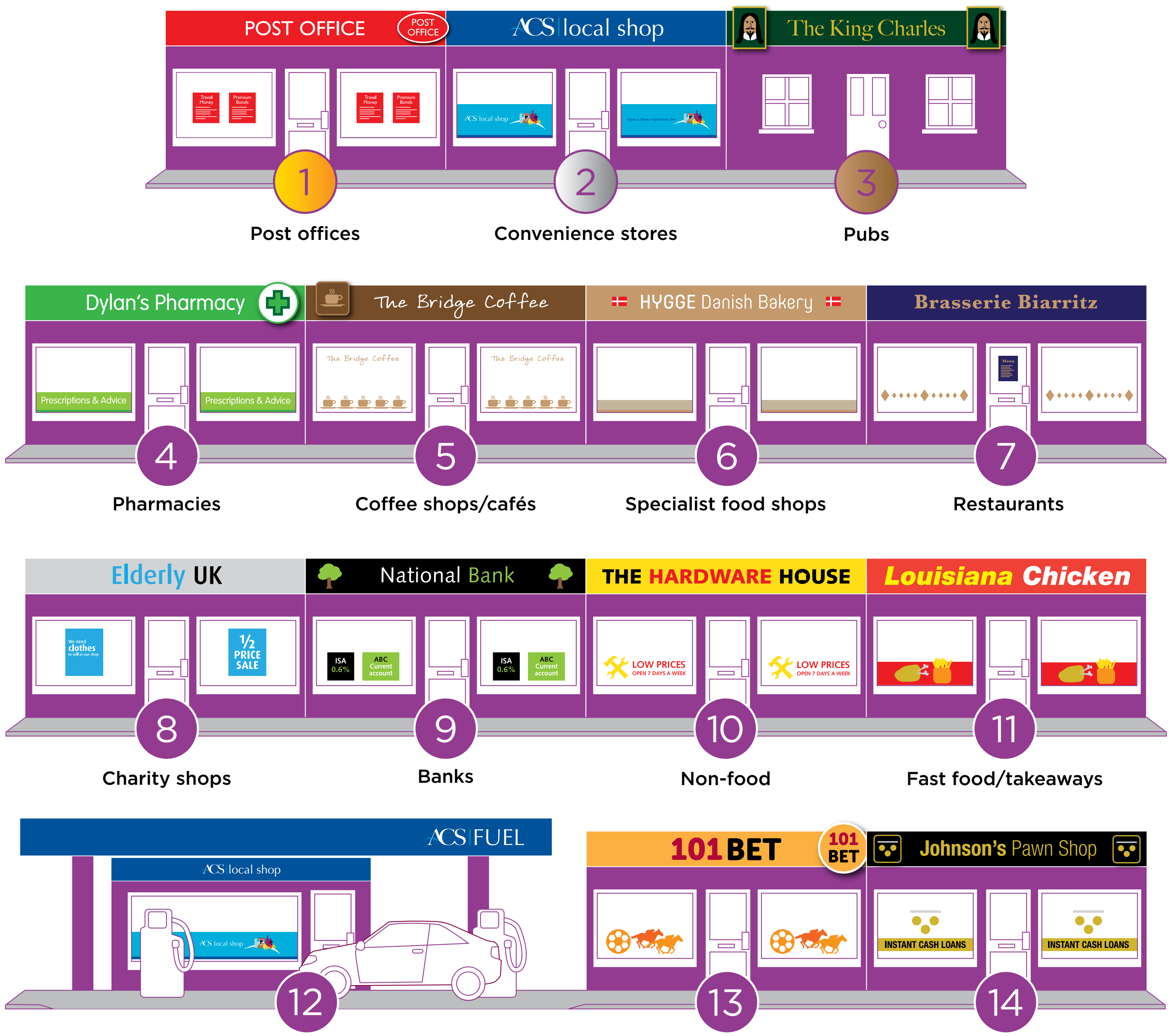
4% of shop owners speak **Gujarati**

اردو

3% of shop owners speak **Urdu**

All data on this spread – source ACS/HIM 2018 (independents only) (Welsh data)

MOST POSITIVE IMPACT ON THE LOCAL AREA



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

TOP THREE MOST WANTED SERVICES

1. Specialist food shops
2. Banks
3. Non-food

COMMUNITY ACTIVITY IN WALES

81% of independent Welsh retailers **engaged** in some form of **community activity** in the past year

- **Collecting money for a national or local charity** (excluding carrier bag charging) – 74%
- Providing funding, or in kind support, to a community event – 17%
- Providing sponsorship to a local sports team or other community activity – 13%
- **Donating to a food bank** – 7%
- Taking part in community, council or local business association meeting or project – 6%

Source: ACS Voice of Local Shops 2018, with the exception of donating to a food bank – Source: ACS/HIM 2018 (independents only) (Welsh data)

CARRIER BAG DONATIONS

- **58%** A local charity
- **18%** Another national charity
- **15%** A health charitable cause
- **8%** An environmental charitable cause

Source: ACS Voice of Local Shops, November 2017 (Welsh data)

COMMUNITY OWNED SHOPS IN WALES

There are **19** community owned shops trading in Wales out of...346 trading across the UK

OVER HALF of community owned shops in Wales offer postal services

Over **1/3** have cafés

646 paid jobs and volunteer positions created

Community owned shops in Wales generated on average a turnover of **£155,894** per store

Community owned shops are resilient forms of business. **The success rate is 95%**

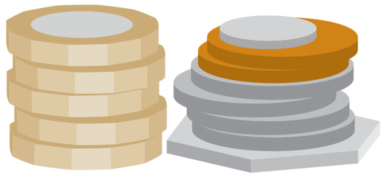
The average for a small business is **41%**

(UK data)

Source: The Plunkett Foundation 2017/2018 (Welsh data)

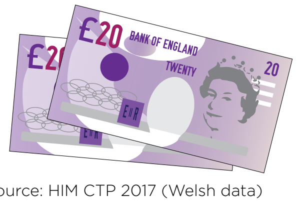
CUSTOMERS

THE AVERAGE SPEND OF A CONVENIENCE SHOPPER IN WALES IS



£5.99

81% of customers pay by cash



Source: HIM CTP 2017 (Welsh data)

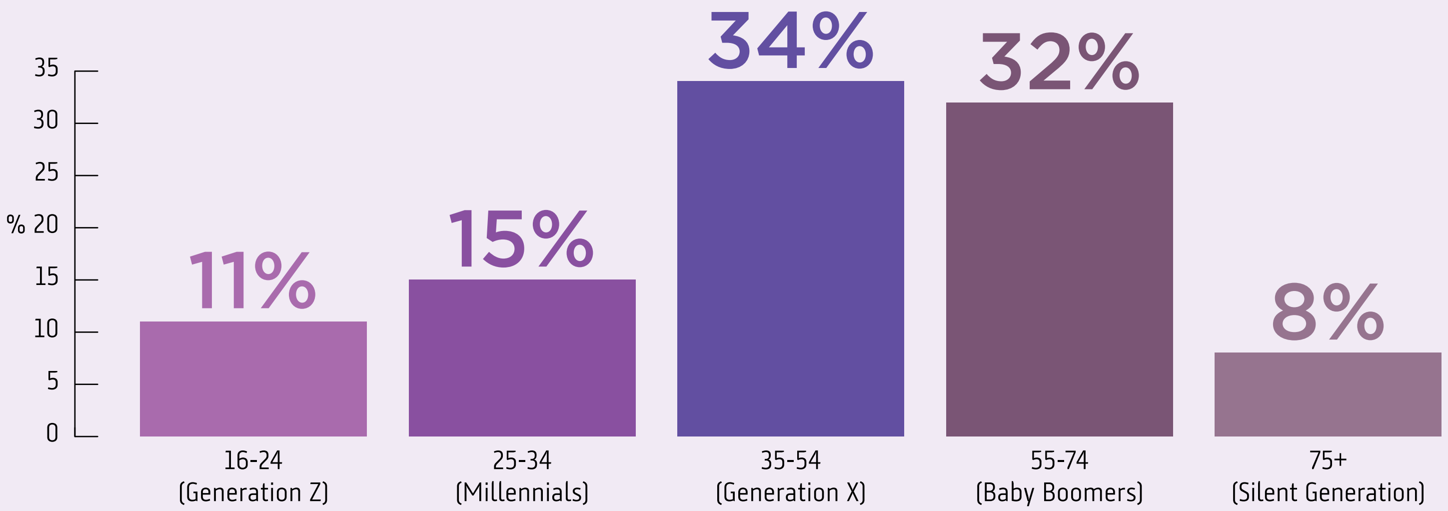
40% WORK FULL TIME

THE AVERAGE SHOPPER VISITS THEIR LOCAL WELSH STORE 3.3 times per week

11% are buying impulse purchases on SPECIAL OFFER

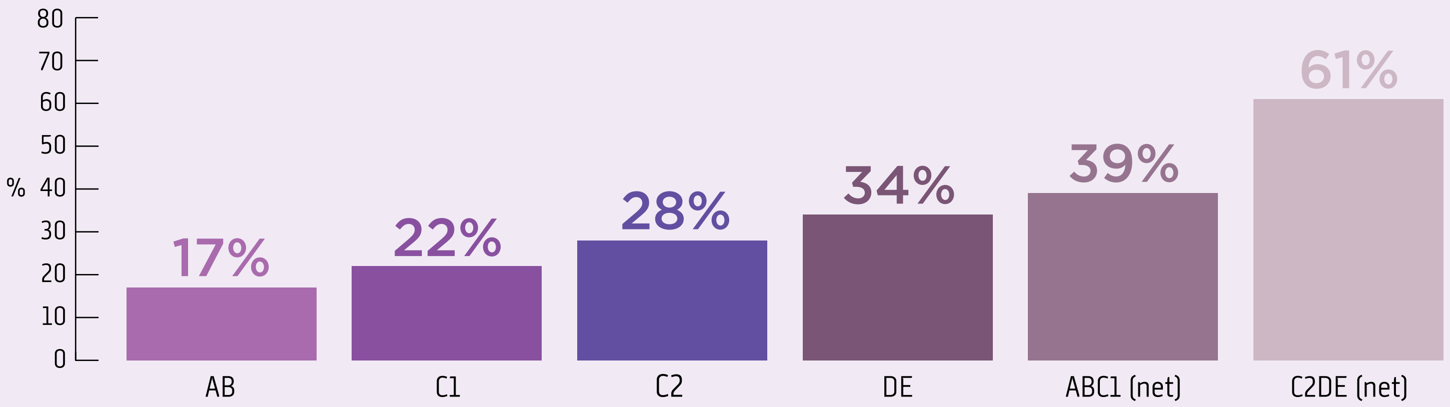
CUSTOMER PROFILE

→ AGE PROFILE OF SHOPPERS



→ GENDER PROFILE

→ SOCIAL GROUPS



TOP TEN DRIVERS TO STORES

1. It's close to where I live
2. It's close to where I work
3. Friendly and helpful staff
4. I like to support my local store
5. Long opening hours
6. Parking
7. Having the products that I want in stock
8. It is independently owned
9. Local staff who know me
10. Fast speed of service/ short queues

MODE OF TRAVEL TO STORES

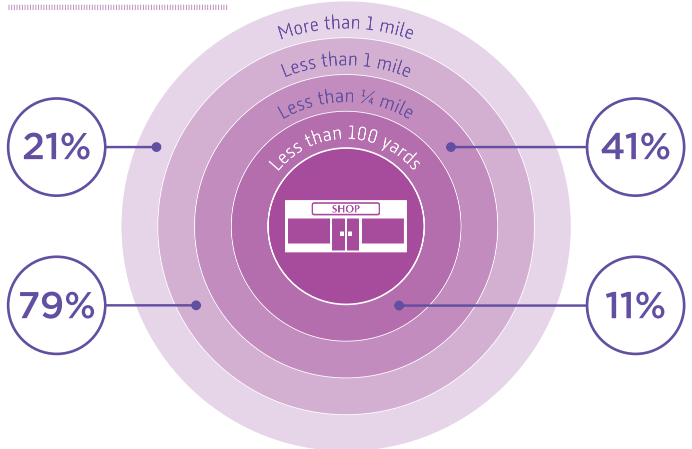
49% Walk/on foot

47% Drive

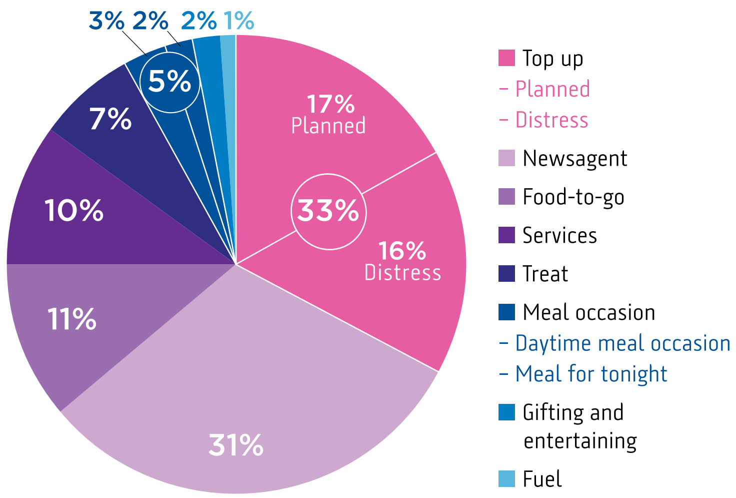
2% Public transport

1% Other

DISTANCE TRAVELLED TO STORE



SHOPPER MISSIONS



VISIT FREQUENCY

Every day: 20%

Most days (5-6 times a week): 13%

Every other day (3-4 times a week): 21%

About once a week (1-2 times a week): 30%

Less than once a week: 18%

» METHODOLOGY

ACS Welsh Shop Report draws on data from the ACS Local Shop Report 2018.

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 2,420 independently owned convenience store businesses in the UK. ACS commissioned HIM Research and Consulting to aid in the design and delivery of the survey. The survey was carried out over the phone by BCC Marketing between 2nd July and 24th July 2018. 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, each returning 220 responses. The data in the Welsh report refers to the 220 independent Welsh respondents. A copy of the survey questions is available on request by emailing katie.cross@acs.org.uk

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 7,669 stores. A copy of the survey questions is available on request by emailing katie.cross@acs.org.uk

The results of these two surveys have been collated and figures for unaffiliated independents, symbol group independents, independent forecourts 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.

Please note there has been a change in methodology this year and the total number of stores has been revised from 49,918 in 2017 to 46,262 in 2018. These changes are due to a change in store classification and methodology and should not be interpreted as a significant reduction in store numbers overall.

Convenience Retailing 2018 report – IGD (Institute of Grocery Distribution)
This report is compiled by the IGD based on the sales data up to the end of March 2018.

ACS Economic Report
ACS commissioned Retail Economics to provide an economic overview of the convenience sector. For more information on this project please visit the ACS website or email katie.cross@acs.org.uk

Convenience Tracking Programme 2018 – HIM Research and Consulting
This programme is a survey of over 20,000 convenience shoppers conducted at the 'moment of truth' in store.

Population data – The Office of National Statistics
Data is taken from mid-2017 population estimates.

Community Barometer
Populus surveyed a nationally representative online sample of 2,074 UK adults aged 18+, between 14th and 15th May 2018. Respondents were surveyed using a questionnaire designed by ACS in collaboration with Populus.

ACS Voice of Local Shops
A quarterly telephone survey with a sample of 1,210 independent retailers, covering the nine regions of England, along with Wales and Scotland. Welsh data refers specifically to 100 independent retailers in Wales. The sample consists of unaffiliated, symbol group and forecourt independents and are represented in the survey in the same proportion as they are in the market. HIM Research and Consulting 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 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 unaffiliated independents, symbol group independents 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 of the survey (Feb 2018 to Nov 2018) unless stated otherwise.

ACS Colleague Survey
An online and paper survey with a sample of 3,843 staff working within the convenience sector. The fieldwork was conducted between 21st December 2017 and the 6th March 2018. The data in this report excludes store managers and refers to a sample of 2,779 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 katie.cross@acs.org.uk

Community Shops – Plunkett Foundation
The number of community owned shops in Wales is obtained from the Plunkett Foundation database and refers to 2018 data.

All other data on community shops is obtained from the Plunkett Foundation report 'Community Shops - A better form of business 2017'. 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.

References

Store numbers (page 3) – Figures sourced from WRBM.

Location (page 3) – Rural/urban/suburban split sourced from WRBM. Definitions are based on population density and are derived from postcode data:

- Urban (density above 30 people per sq. km).
- Suburban (density 10-30).
- Rural (density 0-10).

Shop ownership (page 3) – ACS calculation based on figures sourced from WRBM.

Shops (page 6-7)
- Store numbers – Figures sourced from WRBM.
- Store numbers were divided by the mid-2017 population estimates to obtain population per store.
- Premises Ownership – Results refer to Welsh independent retailers only (including unaffiliated, symbol group and independent forecourt stores). When calculating ownership "Some of the properties are owned and some are rented" responses have been excluded.

Sales (page 8-9)
- Sales/ Market share – Figures sourced from the IGD Convenience Retailing 2018 report.
- Category Sales– Figures sourced from the IGD Convenience Retailing 2018 report. Please note sales category figures have been restated for 2016 and 2017 and this years data should not be compared to previous ACS Local Shop Reports.
- Opening hours – ACS independent and multiple surveys asked respondents what time of day they open and close for the different days of the week. Results for unaffiliated independents, symbol groups, independent forecourts and multiples were collated and combined according to their proportion of stores in the market, to determine overall results for the sector.

Investment (page 10-11)
- Investment per quarter – Average investment per store was obtained from the Voice of Local Shops survey for Welsh independent retailers and from the Multiple Investment Tracker survey for multiples. Respondents were asked to estimate the cost of investment in their store over the last three months. The average investment per store was then multiplied by the number of stores for each store type in the sector, (figures taken from WRBM) and added together to give a total investment figure for each quarter.
- Top areas of investment – For unaffiliated independents and independent symbol groups the data was obtained from the Voice of Local Shops survey and for multiples, results were obtained from the Multiple Investment Tracker survey. Results for unaffiliated independents, symbol group independents and multiples were collated and combined according to their proportion of stores in the market. The results were calculated for the latest four quarters (February 2018 to November 2018) and an overall average was taken.
- Refrigeration – The Independent Retailer Survey and Multiple Retailer Survey asked respondents to estimate how much refrigeration they provided for their stores of 1-999 sq. ft., 1000-1999 sq. ft. and 2000-3000 sq. ft. The results for unaffiliated independents, symbol groups, independent forecourts and multiples were collated and combined according to their proportion of stores in the market.
- Sources of investment – Data was obtained from the Voice of Local Shops survey and refers to independent retailers only (including unaffiliated and symbol group independents). Results were calculated for the latest four quarters (February 2018 to November 2018) and an overall average was taken.

Technology and Services (page 12-13)
- Data obtained from independent and multiple retailer surveys. Results for unaffiliated independents, symbol groups, independent forecourts and multiples were collated and combined according to their proportion of stores in the market, to determine overall results for the sector. Where specified, data reflects an average of 2018 and 2017 results, as two-year averages account for any variations in sampling and methodology changes.

Jobs (page 14-15)
- Jobs – Per store employment figures obtained from ACS independent and multiple surveys. Results for unaffiliated independents, symbol groups, independent forecourts and multiples were collated and combined according to their proportion of stores in the market, in order to determine overall results for the sector.

  The average employment figure was calculated by dividing the total number of jobs in the sector by the total number of stores in the sector. The following averages were identified for jobs per store in each retailer type:

  - Unaffiliated independents (excluding forecourts): 3.92.
  - Independently owned symbol stores (excluding forecourts): 8.89.
  - Independently owned forecourts: 6.44.
  - Multiples (Inc. co-operatives, forecourt multiples, multiply owned symbol stores): 16.18.
  - Sector average: 7.86.

- People – Data for age, gender, hours worked and length of employment were obtained from the ACS independent and multiple surveys and were collated and combined according to their proportion of stores in the market. Data for family employment refers to independent retailers only (including unaffiliated, symbol group and forecourt independents).
- Data for travel, future plans, income, commitments, job satisfaction and on the job training were obtained from the ACS Colleague Survey.

Entrepreneurs (page 16-17)
- All data in this section was obtained from the ACS Independent Retailer Survey and reflects independent retailers only (including those who own symbol stores and forecourts).
- Ethnicity of owners – 'prefer not to say' responses were excluded from analysis. 'Asian or Asian British' category combined results received for each of the following categories: Asian or Asian British, Indian, Pakistani, Bangladeshi, any other Asian background.
- 'Prefer not to say responses' were also excluded from ownership age.

Communities (page 18-19)
- Most positive impact – respondents were asked "which of the following types of services do you believe has the most positive impact on your local area? Select up to three which you think have the most positive impact" and answers were ranked to reflect opinion.
- Top three most wanted services – respondents were asked "for each of the following types of services, please indicate whether you think that it would be beneficial for your local area to have more or less of these types of services, or if you think the number should remain the same?"
- Community activity – data was obtained from averaging the results from the most recent four ACS VOLS surveys (February 2018 to November 2018) and reflects independent retailers only (including those who own symbols stores and forecourts).
- Carrier bag donations – Percentage of retailers who donate their carrier bag charge obtained from ACS Voice of Local Shops survey November 2017.
- Community shops – number of community owned shops obtained from Plunkett Foundation 2018 database. All other data was obtained from Plunket Foundation Community Shops Report 2017.

Customers (page 20-21)
- All data in this section was obtained from HIM CTP 2018, except for the percentage of customers who pay by cash which has been taken from HIM CTP 2017.

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 represents convenience stores in Wales by engaging with Welsh government officials on the latest policy developments, Welsh Members of Parliament and Assembly Members directly, as well as by providing the secretariat for the Cross Party Group on Small Shops.

For more information about ACS, visit our website.

ACS.org.uk

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

him · IGD · Plunkett Foundation · Populus · RetailEconomics · William Reed INFORMING BUSINESS GROWTH

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