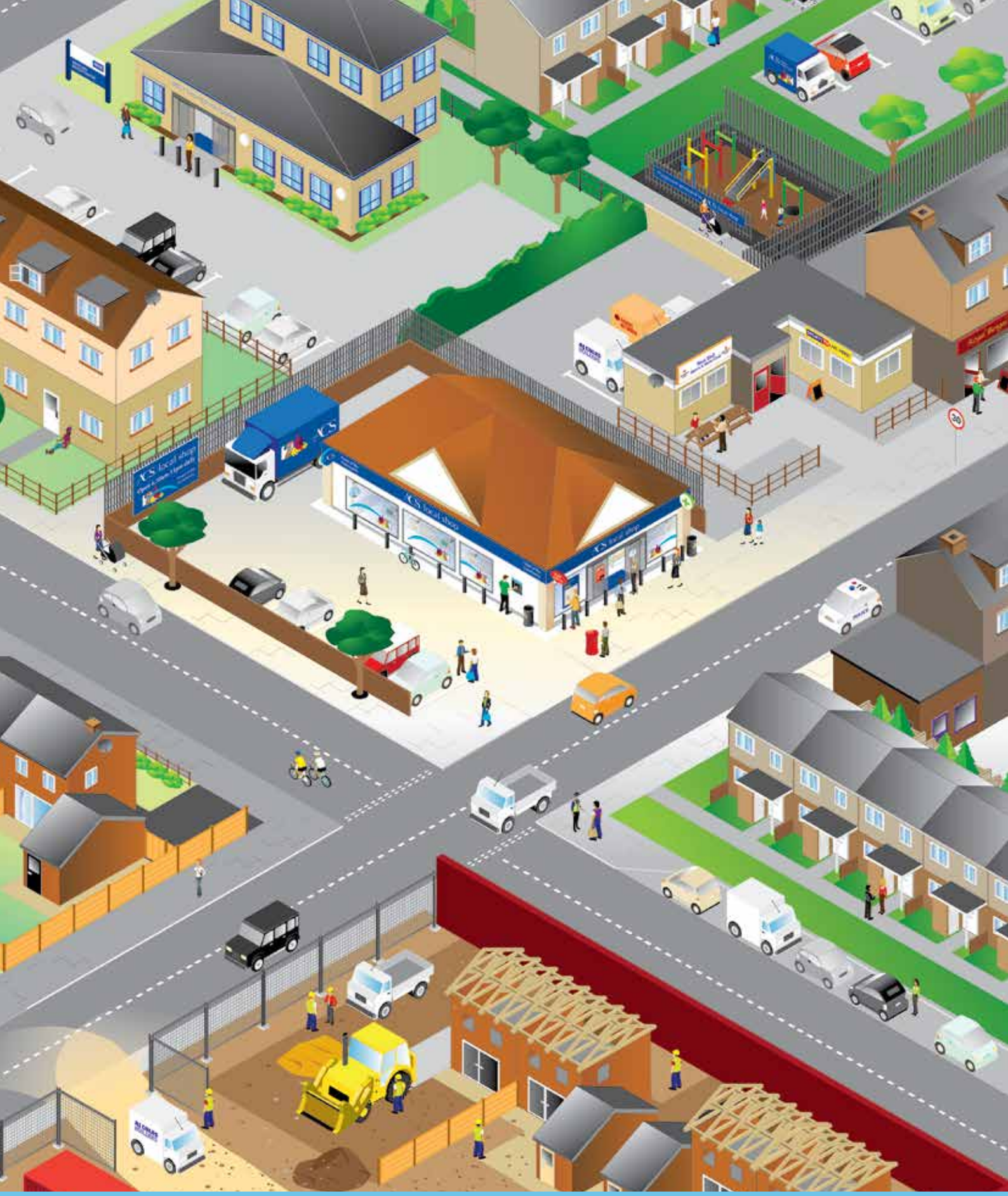

THE WELSH LOCAL SHOP REPORT 2017

ACS | the voice of local shops

A report by the Association of Convenience Stores

ACS | the voice of local shops

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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. All of our submissions to Government can be found in the Lobbying section of our website.

For more information about ACS, visit our website.

ACS.org.uk

CONVENIENCE STORES – THE MODERN LOCAL SHOP

The value the Welsh convenience sector adds to the economy in Gross Value Added is just over... **£309m***

The local shop is a long standing feature of Welsh communities, it is however constantly evolving and changing.

The modern local shop has developed within the convenience store format. It is typically characterised as follows:

- Open for long hours, usually seven days a week, and not subject to restrictions under the Sunday Trading Act.
- Occupying a small store premises – usually smaller than 280 square metres or 3,000 square feet (see page 7).
- Stocking a broad range of product categories (see page 9).

Beyond these three defining characteristics is a significant amount of variety. Local shops operate in and serve all types of communities across Wales.

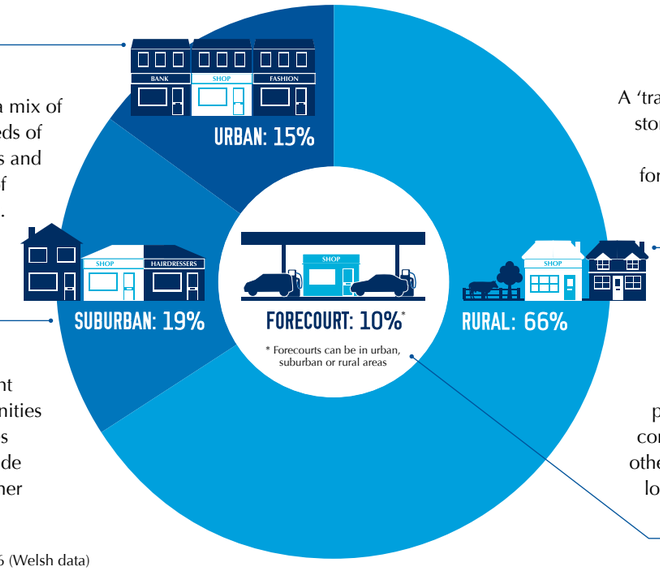
Industry experts tend to categorise the industry by ownership types (for a full breakdown see page 7) – there are:

- Co-operatives – groups of stores that are owned by their customers, the biggest by far is The Co-operative Group, but there are a number of smaller co-operative societies operating convenience stores around the country;
- Multiples – chains of stores run from a head office (examples are McColl's Retail Group, BP and Tesco Express);
- Symbol groups – these are groups usually organised by a wholesaler that are made up of independent businesses but collaborate in joint buying and marketing initiatives (examples are Spar, Costcutter, Londis, Mace and Best One);
- Franchises – these stores are run by independent retailers who enter into a franchise agreement with a brand to develop their store. These stores are included within the multiple segment;
- Non-affiliated independents – these tend to be the smallest businesses in the market.

*Source: ACS Costs Barometer 2014

LOCATION

Convenience stores in Wales trade in a wide variety of Locations meeting many needs:



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

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

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

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

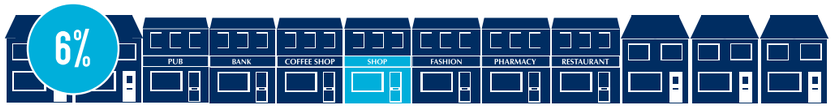
Source: WRBM/Nielsen 2016 (Welsh data)

NEIGHBOURING BUSINESSES

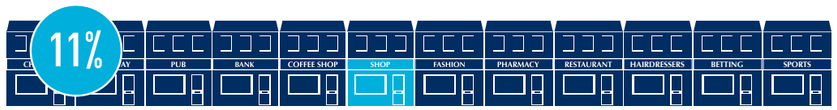
ISOLATED STORE
no other retail/service businesses close by

LOCATED ON A SMALL PARADE
up to 5 retail/service businesses close by

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



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



Source: ACS/him! 2016 (Welsh data)

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SUMMARY

Data related to overall sales is sourced from the Institute of Grocery Distribution; data related to shops is sourced from William Reed Business Media and Nielsen, data related to Customers is sourced from him! research and consulting; data relating to communities is sourced from the ACS Community Barometer conducted with ComRes. All other data is sourced from bespoke research for ACS. The full methodology is available on page 22.

SHOPS

- There are 3,096 convenience stores in Wales.
- 41,675 **in England**.
- 5,324 **in Scotland**.
- 89% of Local shops in Wales are owned and operated by **small business owners**.
- 72% of retailers in Wales **own the premises** they operate from.

FEATURES

The Welsh convenience sector includes a range of features and services to meet the needs of customers, including staples **like lottery** (76%), **mobile phone top up** (62%) and **bill payment services** (58%) as well as emerging technologies like **contactless payment** (40%), **smart meters** (26%) and **digital advertising screens** (21%).

Many stores are also ensuring that they meet the needs of disabled customers, with over a third (36%) **featuring wheelchair access**.

SALES

- The **total value of sales** in the Welsh convenience sector in the year to April 2016 was £2.3 billion.
- **Turnover** in the Welsh convenience sector **has grown by almost** £25m over the last year.

Sales by ownership

- **Symbol groups*** account for 37.9% of sales in the sector.
- **Multiple chains** and **co-operatives** account for 34.5% of total sales.
- **Non-affiliated independents** account for 16.9% of sales.

Sales by category

- **Chilled and fresh fruit and veg** accounts for 23.8% of sales.
- **Bread and bakery** accounts for 5.5% of sales.
- **Sandwiches** account for 2.8% of sales.

* Symbol group means retailers – usually independents – trading together under a common brand.

COMMUNITIES

Convenience stores and **Post Offices** are the two services that are seen to have the **most positive impact** on their local area by councillors, consumers and MPs.

- 89% of independent retailers in Wales engaged in some form of **community activity** over the last year.
- **Wales is the most engaged region in the UK** in terms of community activity.

CUSTOMERS

The **average spend in a convenience store** is £6.13.

79% of customers **pay by cash**.

More than half of customers (56%) **walk** to their local convenience store, with 5% **using public transport**.

More than one in five customers (22%) **visit** their local shop **every day**.

INVESTMENT

Local shops in Wales have **invested £53m** in their businesses **over the last year**.

The most popular form of investment is in **building maintenance**, with 40% making an investment over the last year.

The **average annual investment** per store type in Wales is:

- Independents: £9,490.
- Symbol groups: £14,180.
- Multiples: £33,454.

ENTREPRENEURS

Four in five store owners in Wales (80%) **are first time investors**, as opposed to inheriting their business.

Convenience store owners in Wales work very long hours, with 20% of **shop owners taking no holiday** in the year and 20% working **more than 70 hours per week.**

21% of owners in Wales have been in their business for **more than 25 years**.

Ethnicity

78% of business owners in Wales **describe themselves as White British**, while 18% **describe themselves as Asian or Asian British**.

83% of **store owners in Wales speak English** as their **first language**. 9% **of store owners in Wales speak Welsh**.

JOBS

Convenience stores in Wales provide over 25,000 **jobs**.

Job profiles

- 65% of staff in Welsh stores are **women**.
- 18% of staff in Welsh stores are aged **16 to 24**.
- 14% of staff in Welsh stores are **over 60** years old.

26% of employees in Welsh stores **work 31 hours per week** or more. 41% of staff in Welsh stores have **worked at their shop** for **more than five years**.

36% of convenience store staff in the UK **are the only income earner** in **their families**.

The **average travel time for staff** to work in UK convenience stores is 13 minutes.

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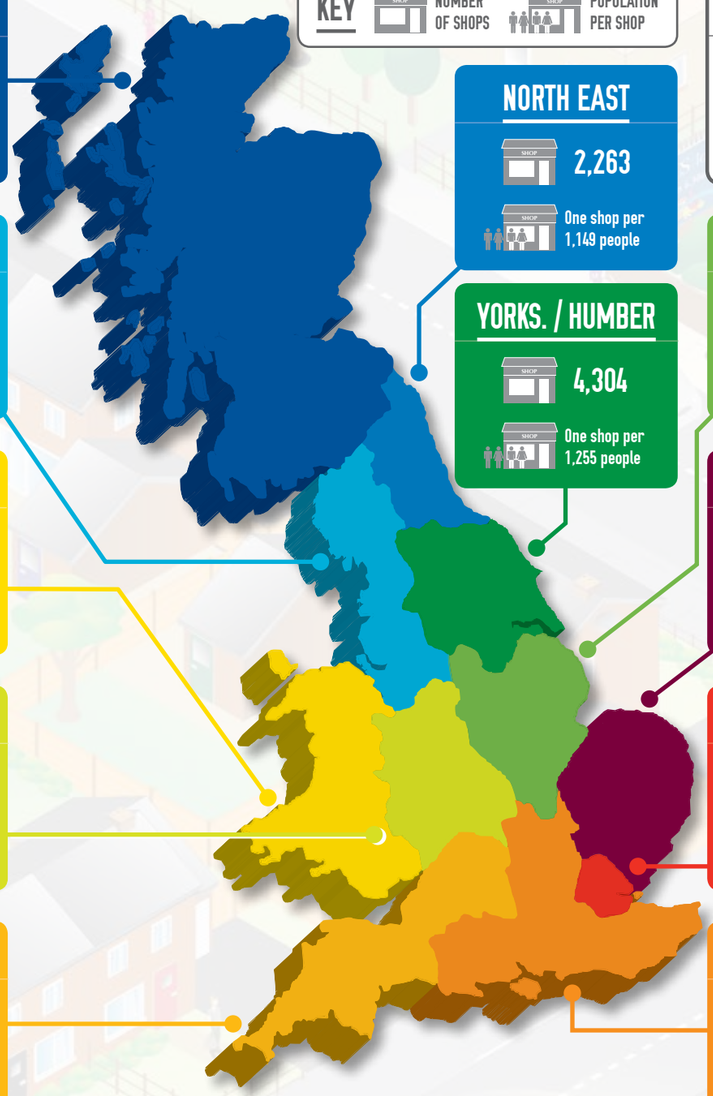
SHOPS

3,096
CONVENIENCE STORES IN WALES

Wales has more shops per head than any English region

89% of convenience stores in Wales are run by INDEPENDENT RETAILERS

SHOP NUMBERS



KEY: NUMBER OF SHOPS / POPULATION PER SHOP

SCOTLAND
5,324
One shop per 995 people

NORTH WEST
5,425
One shop per 1,309 people

WALES
3,096
One shop per 1,001 people

WEST MIDLANDS
4,761
One shop per 1,197 people

SOUTH WEST
4,330
One shop per 1,247 people

NORTH EAST
2,263
One shop per 1,149 people

YORKS. / HUMBER
4,304
One shop per 1,255 people

ENGLAND TOTAL
41,675
One shop per 1,302 people

EAST MIDLANDS
3,789
One shop per 1,214 people

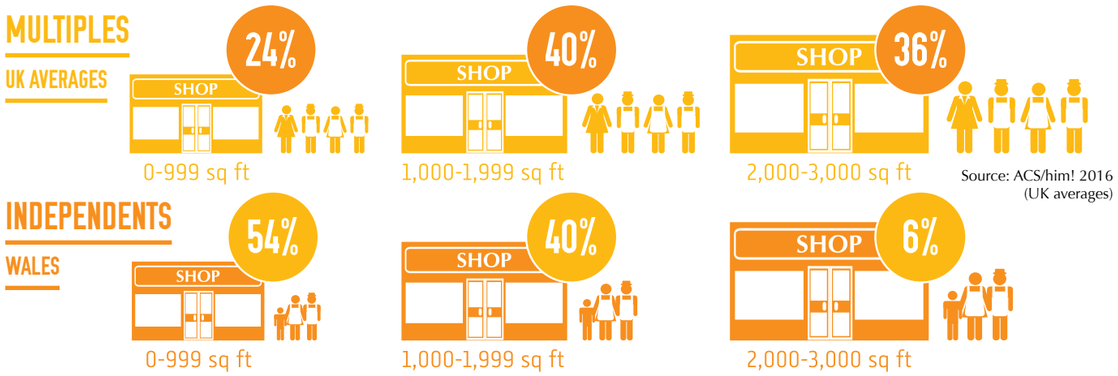
EASTERN
4,278
One shop per 1,403 people

LONDON
6,517
One shop per 1,304 people

SOUTH EAST
6,008
One shop per 1,481 people

All data on this page – source: WRBM/Nielsen 2016 and ONS 2015

SHOP SIZE



Source: ACS/him! 2016 (UK averages)

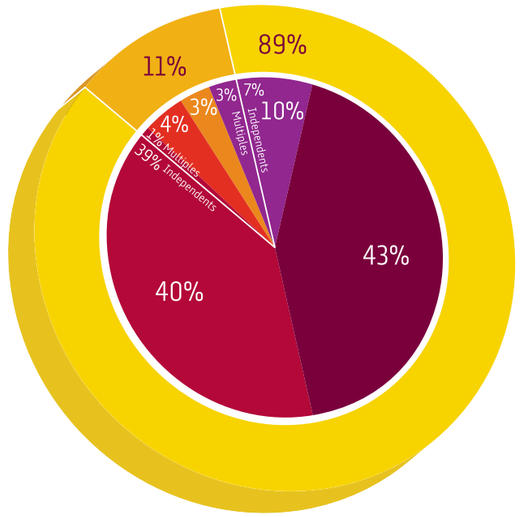
Source: ACS/him! 2016 (Welsh data)

SHOP OWNERSHIP

The vast majority of shops in the convenience sector are owned and operated by small business owners. Together independent retailers make up 89% of the Welsh convenience sector.

Symbol groups are groups of independent retailers trading under a common customer facing brand – familiar symbol groups include brands such as Spar, Costcutter, Nisa Local, Premier and Simply Fresh. 39% of stores in Wales are run by Independent retailers that choose to trade in this way. However, there are also stores that trade under these brands but are chains of stores that are run from a central head office.

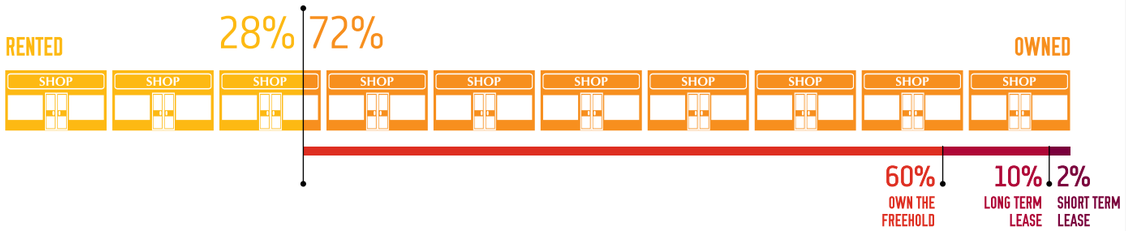
Convenience stores operating on petrol forecourts are an important part of the market with a combination of multiply owned and run stores and independently owned and run stores making up 10% of Welsh convenience stores.



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

Source: WRBM/Nielsen 2016 (Welsh data)

PREMISES OWNERSHIP



Source: ACS/him! 2016

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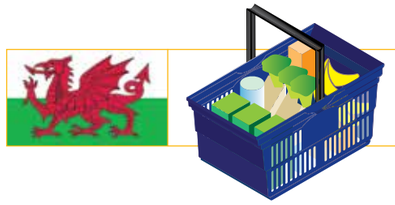
SALES

Total value of sales for Welsh convenience stores

in the year to April 2016

£2.3bn



Turnover grew by...

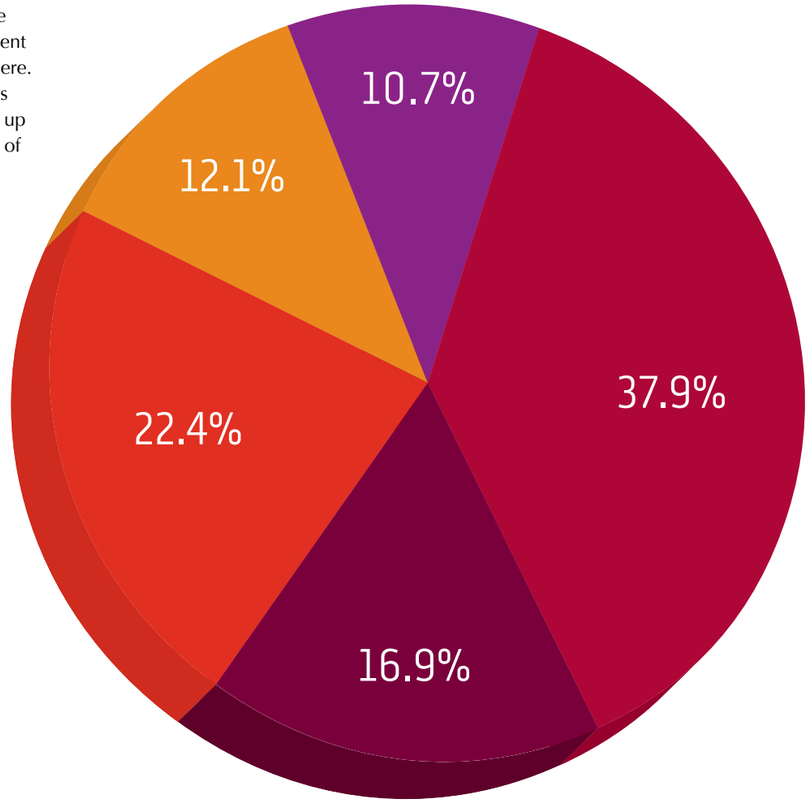
ALMOST £25m

between 2015 and 2016

Source – ACS, based on IGD 2016 data

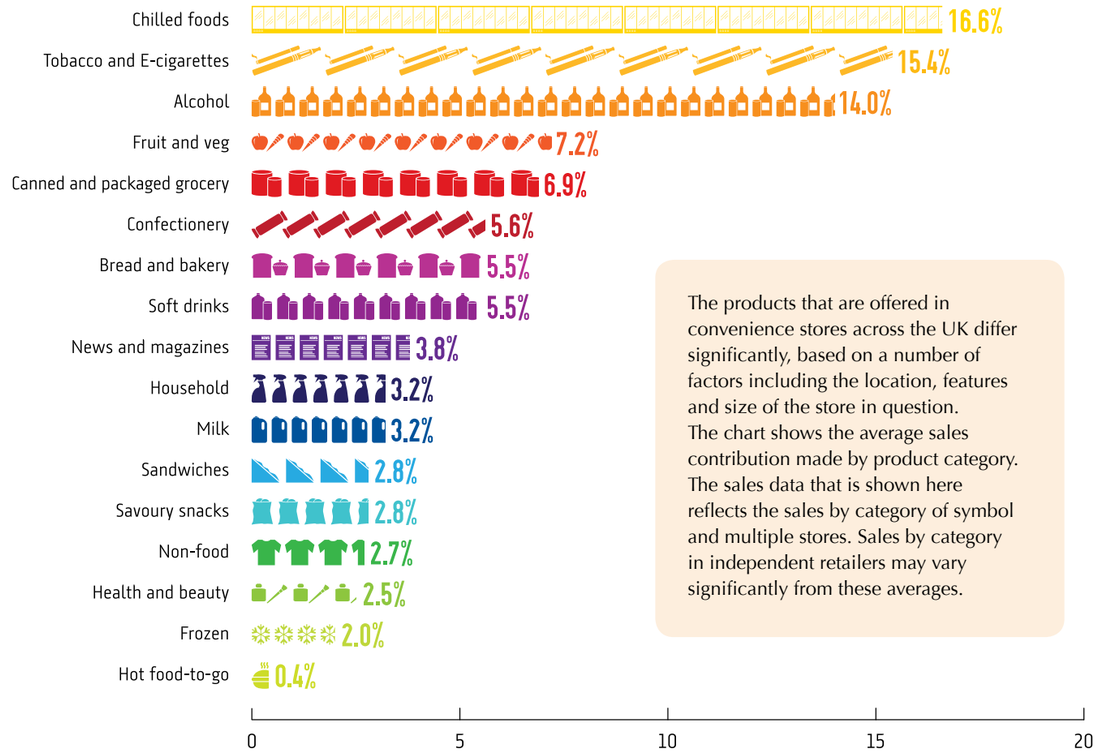
MARKET SHARE OF SALES

Sales in the convenience store sector are split between different types of operators as shown here. The distribution of sales differs from how the market is made up (see page 7), with some types of stores likely to receive higher average turnovers.



Source: IGD 2016

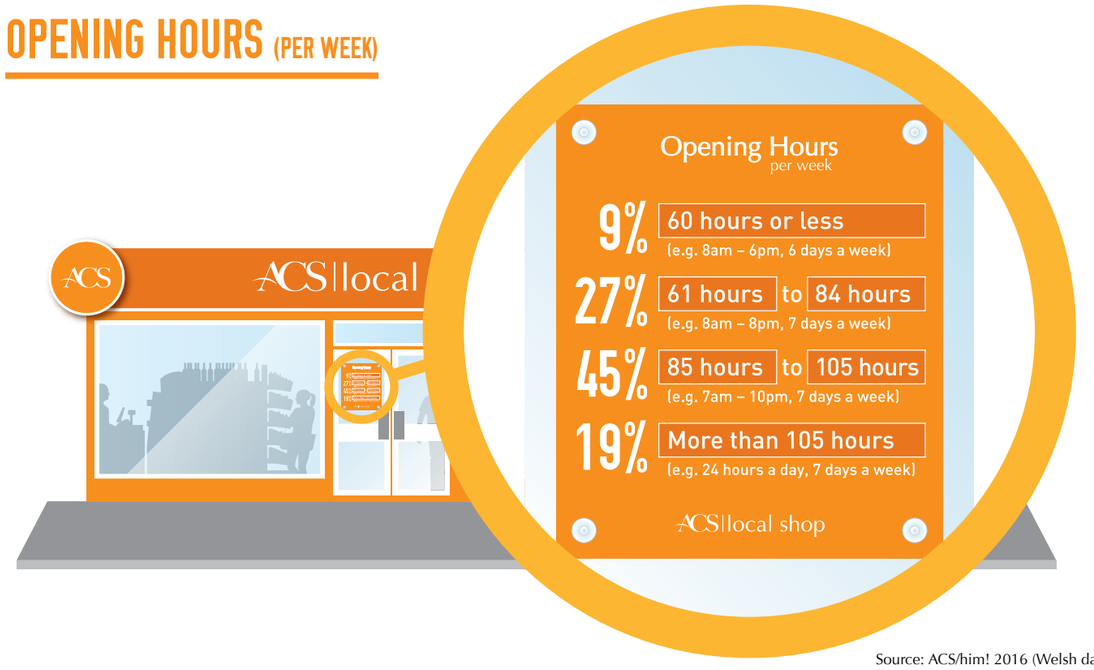
SHOP CATEGORIES



The products that are offered in convenience stores across the UK differ significantly, based on a number of factors including the location, features and size of the store in question. The chart shows the average sales contribution made by product category. The sales data that is shown here reflects the sales by category of symbol and multiple stores. Sales by category in independent retailers may vary significantly from these averages.

Source: IGD 2016 (UK averages)

OPENING HOURS (PER WEEK)



Source: ACS/him! 2016 (Welsh data)

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INVESTMENT

OVER THE LAST YEAR CONVENIENCE STORES IN WALES HAVE INVESTED £53 million IN THEIR BUSINESSES

INVESTMENT PER QUARTER

FEBRUARY	MAY	AUGUST	NOVEMBER
£6m	£10m	£14m	£23m

2016

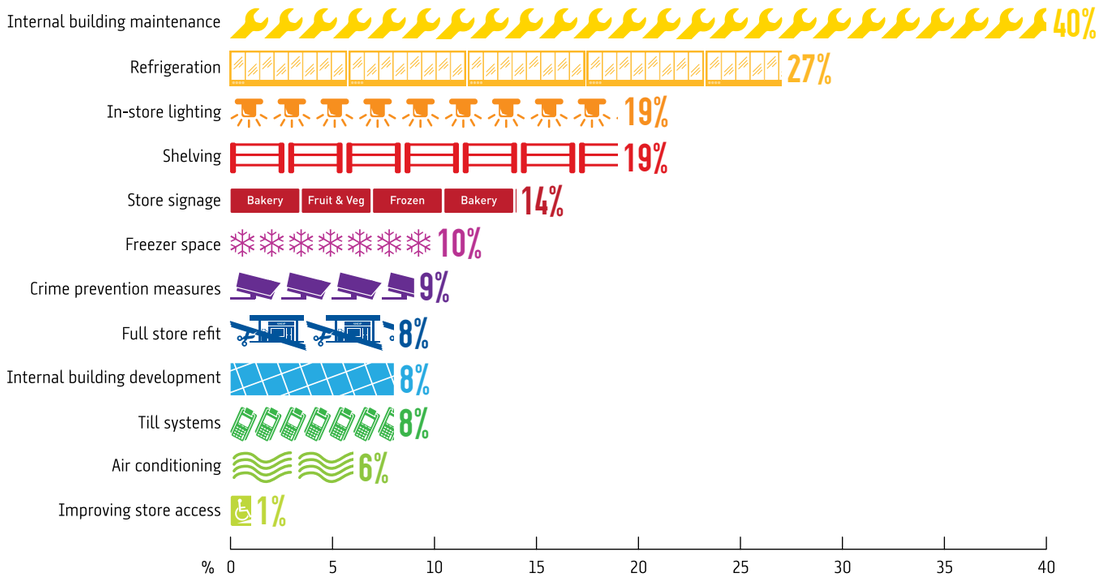
AVERAGE ANNUAL INVESTMENT PER STORE TYPE

Welsh independents: £9,490

Welsh symbols: £14,180

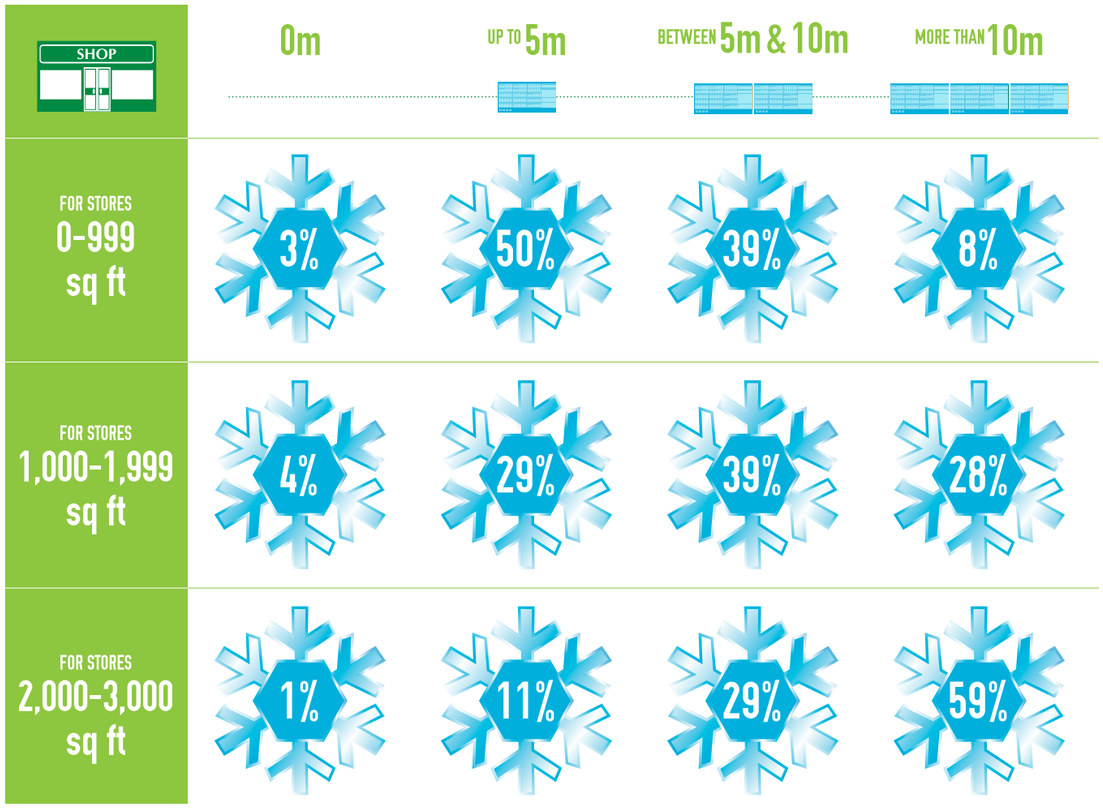
Multiples (UK average): £33,454

AREAS OF INVESTMENT (OF THOSE INVESTING)



All data on this page – source: ACS Investment Tracker 2016 (Welsh data unless otherwise specified)

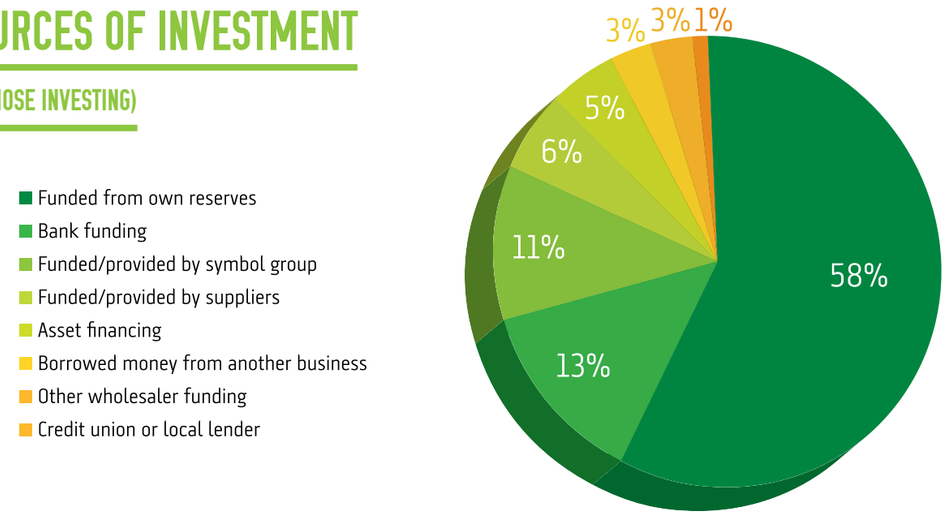
REFRIGERATION



Source: ACS/him! 2016 (Welsh data)

SOURCES OF INVESTMENT

(OF THOSE INVESTING)



Source: ACS Investment Tracker 2016 (Welsh independents only)

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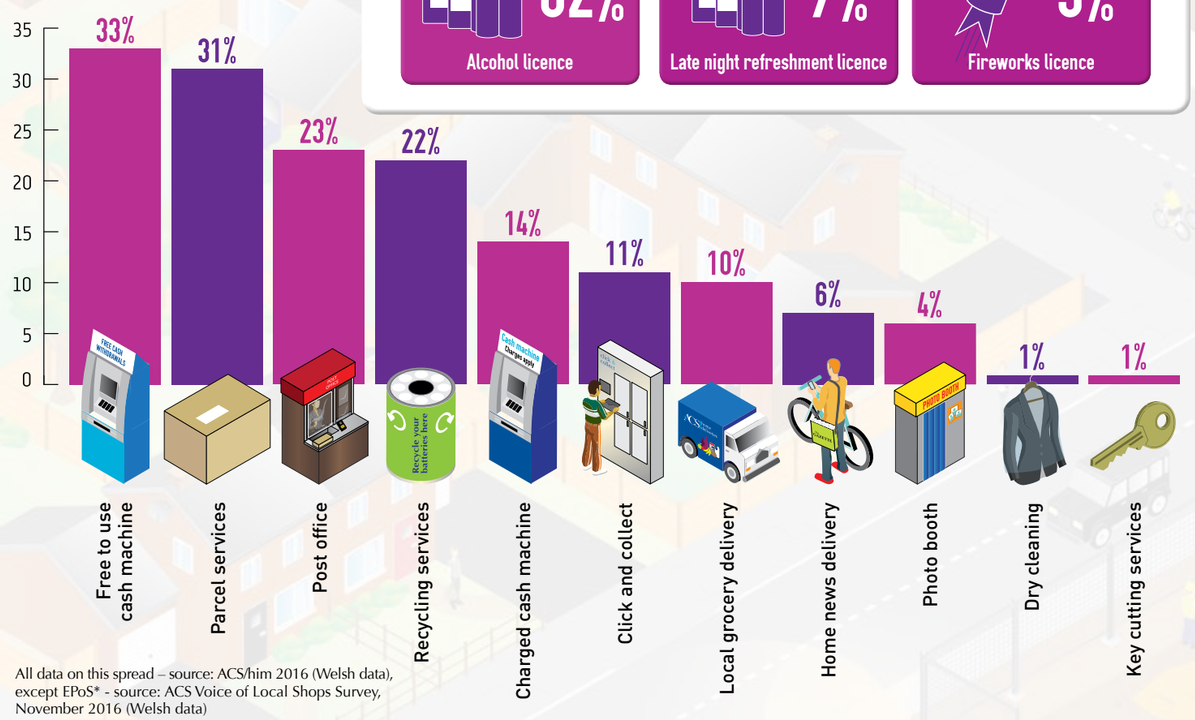
FEATURES

BEHIND THE COUNTER

- Lottery 76%
- EPoS 72%*
- Mobile phone top up 62%
- Bill payment services 58%
- Cash back 54%
- Loyalty card 28%
- Car Wash 6%
- Self serve checkout 2%
- Prescription collections 1%

SERVICES



LICENSING

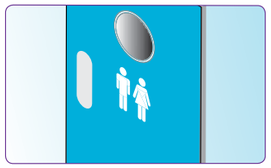
- Alcohol licence 82%
- Late night refreshment licence 7%
- Fireworks licence 3%

All data on this spread – source: ACS/him 2016 (Welsh data), except EPoS* - source: ACS Voice of Local Shops Survey, November 2016 (Welsh data)

IN-STORE

CCTV 76%

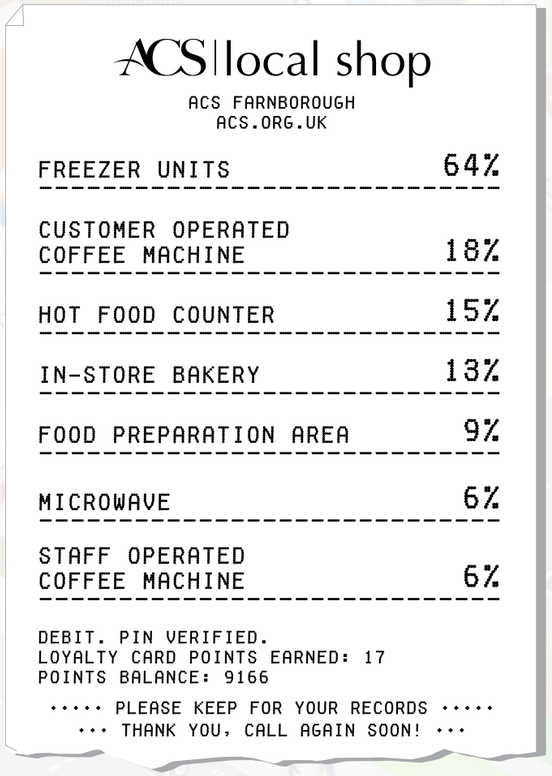
Community noticeboard 19%



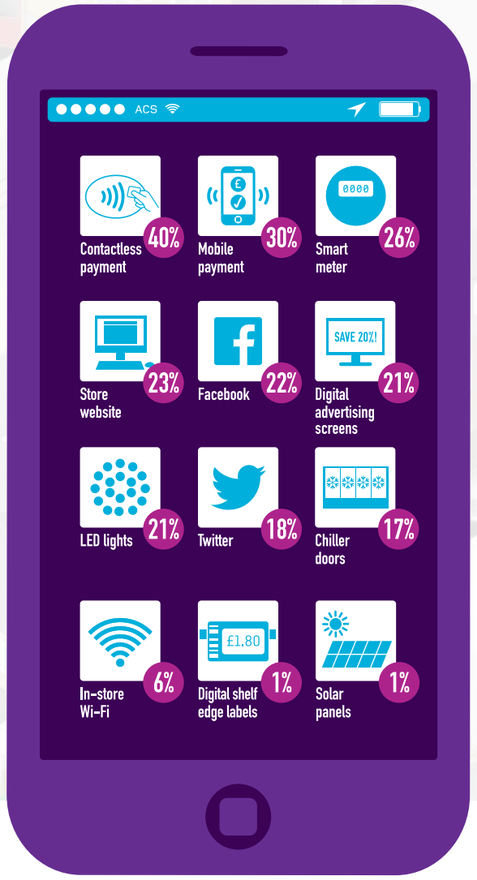
Customer toilets 11%

Seating area 4%

FOOD AND DRINK



TECHNOLOGY



ACCESSIBILITY

Wheelchair access 36%

Wider aisles to improve accessibility 10%

Hearing aid loops 8%

Home delivery for older customers 7%

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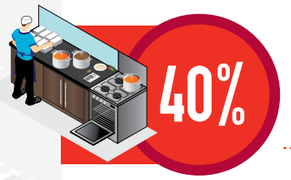
JOBS

Convenience stores in Wales provide over **25,000 JOBS**



40% of Welsh shops offer food safety training

Independent shops in Wales make first aid training available to over... **2,600** people

12% of convenience store staff have study commitments outside work*

Source: ACS/him! 2016 (Welsh data)

*Source: ACS Colleague Survey 2016 (UK averages)

TRAVEL

AVERAGE TRAVEL COST

£2.00 per day

AVERAGE TRAVEL TIME

13 minutes

MODE OF TRAVEL TO WORK

51% Walk/on foot

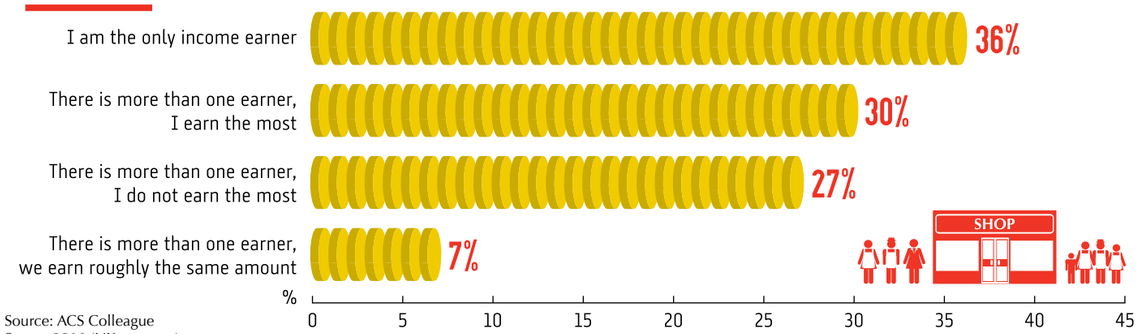
37% Drive

10% Public transport

2% Other

Source: ACS Colleague Survey 2016 (UK averages)

INCOME



Source: ACS Colleague Survey 2016 (UK averages)

PEOPLE

GENDER PROFILE

AGE PROFILE

FAMILY EMPLOYMENT

HOURS WORKED

LENGTH OF EMPLOYMENT

All data on this page – source ACS/him! 2016 (Welsh data). Family employment data refers to independent retailers only.

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ENTREPRENEURS

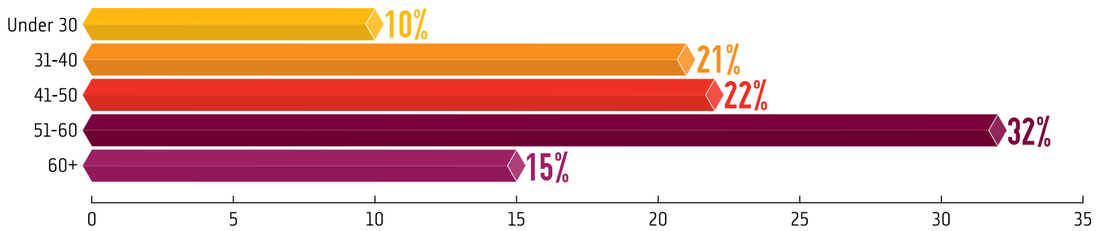
20% of Welsh shop owners work more than 70 hours per week

20% of Welsh shop owners take no holiday per year

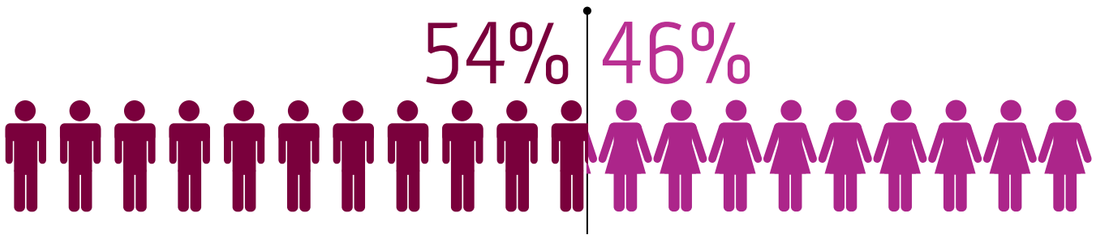
34% of Welsh businesses are owned by family partnerships

21% have been in the business for more than 25 years

OWNERSHIP AGE PROFILE

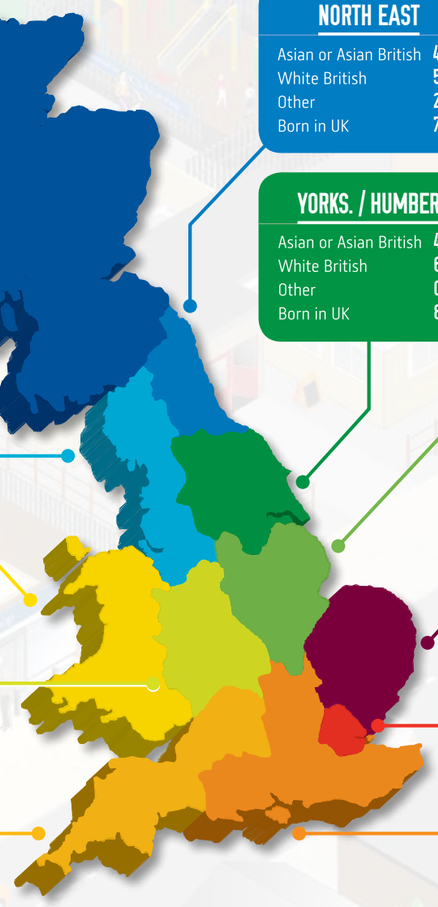


OWNERSHIP GENDER PROFILE



All data on this spread – source ACS/him! 2016 (Welsh independents only)

ETHNICITY OF OWNERS



SCOTLAND

Asian or Asian British	41%
White British	57%
Other	2%
Born in UK	73%

NORTH WEST

Asian or Asian British	41%
White British	56%
Other	3%
Born in UK	73%

WALES

Asian or Asian British	18%
White British	78%
Other	4%
Born in UK	86%

WEST MIDLANDS

Asian or Asian British	58%
White British	41%
Other	1%
Born in UK	63%

SOUTH WEST

Asian or Asian British	13%
White British	85%
Other	2%
Born in UK	89%

NORTH EAST

Asian or Asian British	42%
White British	56%
Other	2%
Born in UK	78%

YORKS. / HUMBER

Asian or Asian British	40%
White British	60%
Other	0%
Born in UK	81%

ENGLAND TOTAL

Asian or Asian British	48%
White British	49%
Other	3%
Born in UK	64%

EAST MIDLANDS

Asian or Asian British	60%
White British	39%
Other	1%
Born in UK	65%

EASTERN

Asian or Asian British	35%
White British	62%
Other	3%
Born in UK	67%

LONDON

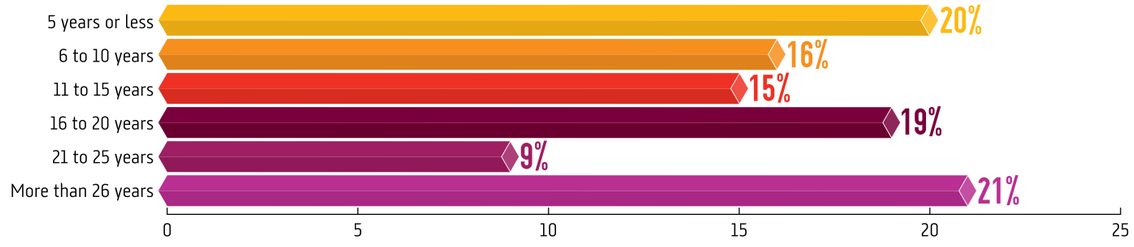
Asian or Asian British	83%
White British	11%
Other	6%
Born in UK	29%

SOUTH EAST

Asian or Asian British	45%
White British	51%
Other	4%
Born in UK	60%

BUSINESS PROFILE

TIME IN BUSINESS



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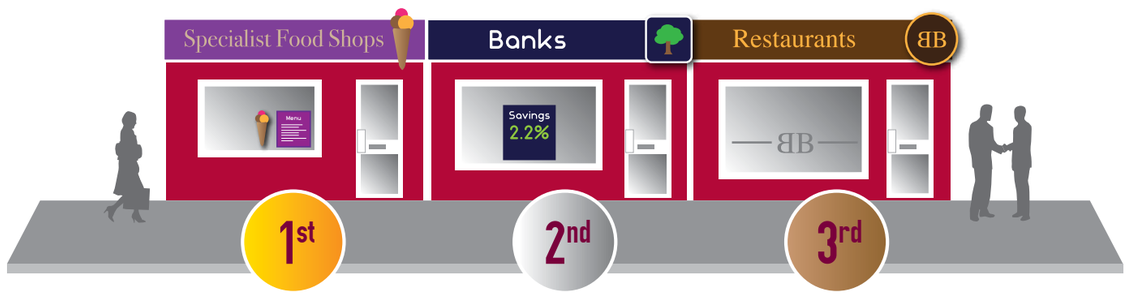
COMMUNITIES

MOST POSITIVE IMPACT ON LOCAL AREA

TOP THREE MOST WANTED SERVICES

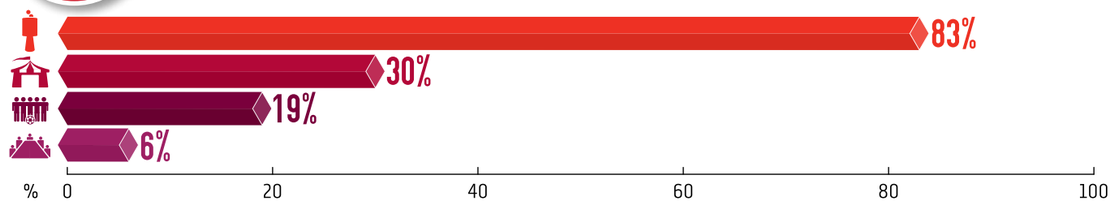


All data on this page – source: ACS Community Barometer 2016 (Welsh data)

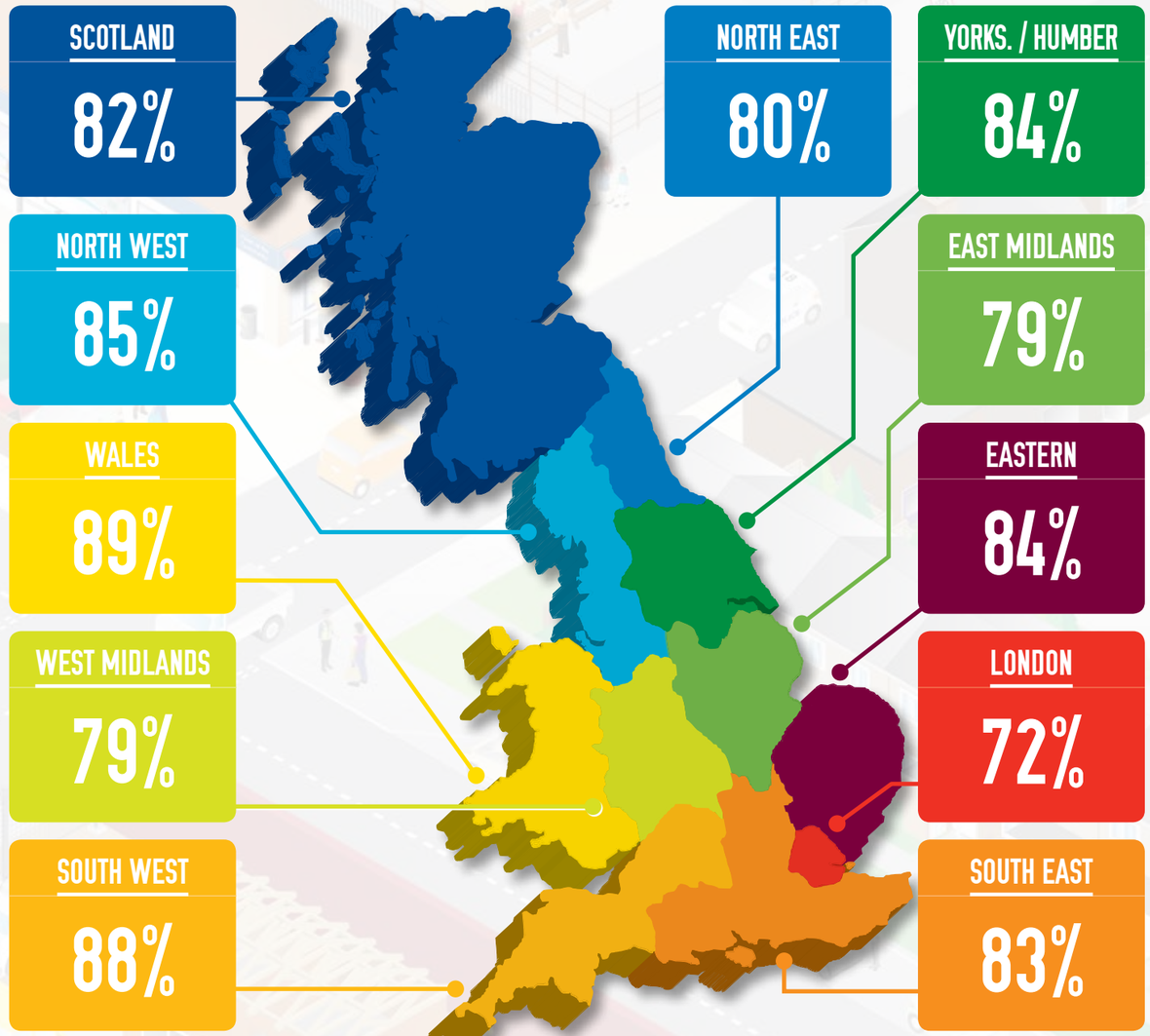
COMMUNITY ACTIVITY

KEY
- Collecting money for a national or local charity
- Providing funding, or in kind support, to a community event
- Providing sponsorship to a local sports team or other community activity
- Community, council or local business association meeting or project

89% of independent Welsh retailers engaged in some form of community activity in the past year



TOTAL COMMUNITY ACTIVITY BY REGION



All data on this page – source: ACS/him! 2016

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CUSTOMERS

the average spend is £6.13

79% of customers pay by cash

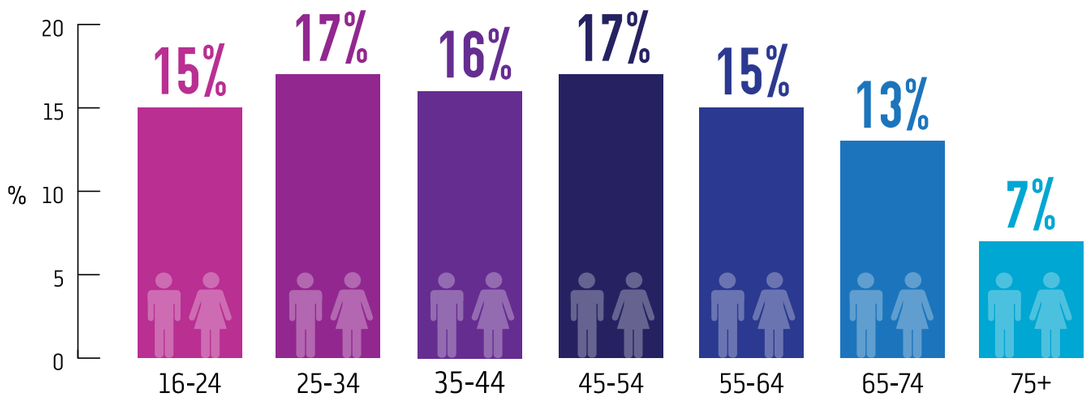
43% work full time

the average shopper visits their local store 3.6 times per week

21% are buying on SPECIAL OFFER

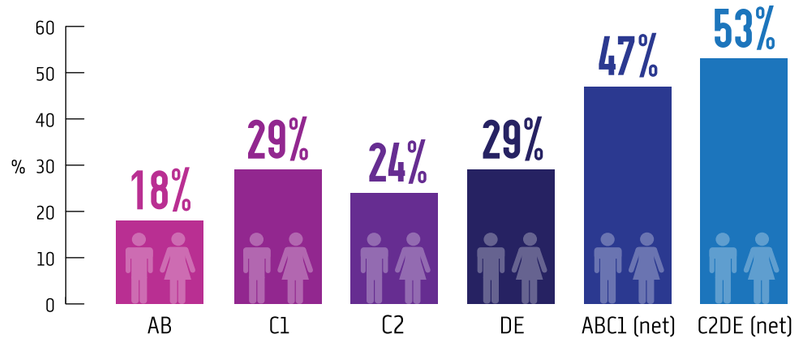
CUSTOMER PROFILE

AGE OF PROFILE OF SHOPPERS



GENDER PROFILE

SOCIAL GROUPS



All data on this spread – source: him! CTP 2016 (UK averages)

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. Local staff who know me
6. Long opening hours
7. Having the products that I want in stock
8. Value for money
9. Parking
10. Shop cleanliness/ tidiness

MODE OF TRAVEL TO STORES

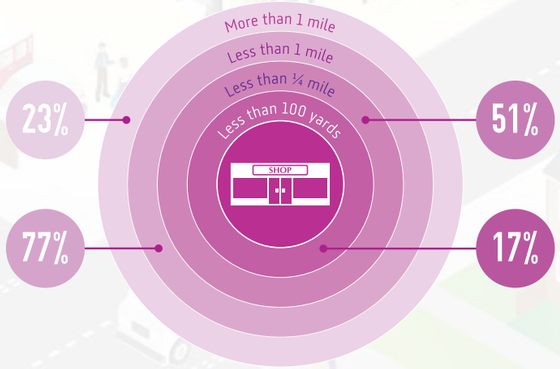
56% Walk/on foot

35% Drive

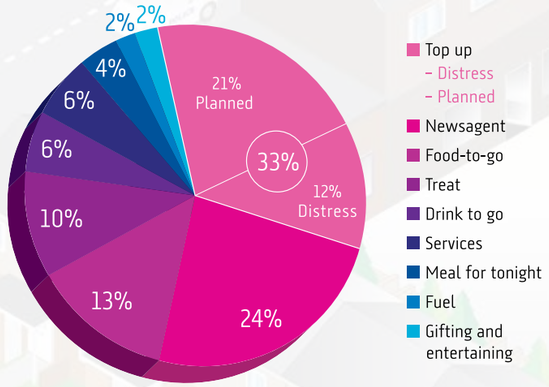
5% Public transport

4% Other

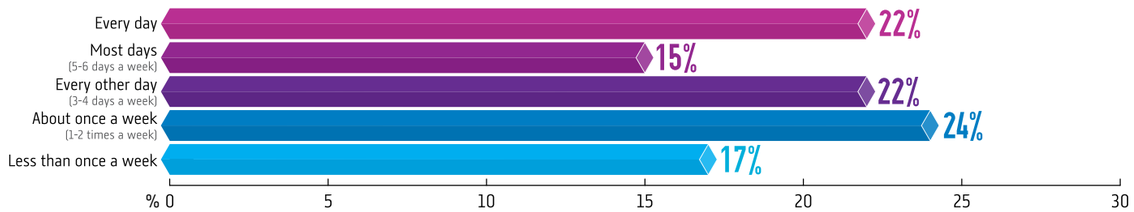
DISTANCE TRAVELLED TO STORE



SHOPPER MISSIONS



VISIT FREQUENCY



METHODOLGY

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 contracted 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 13th June and 8th July 2016. The survey gathered responses from non-affiliated independent convenience stores, independent forecourt stores and independent stores that are part of central buying or marketing (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 as set out in the report, each returning 200 responses. A copy of the survey questions and responses is available on request by emailing katie.cross@acs.org.uk

2. Multiple Retailer Survey – ACS conducted a 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 related to a sample of 5,765 stores. A copy of the survey questions and responses is available on request by emailing katie.cross@acs.org.uk

The results of these two surveys have been collated and figures for non-affiliated 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.

Nielsen and William Reed Business Media Sector data
Nielsen utilises cross referencing data from trade associations, retailers, suppliers and customer lists. This is supplemented by gap analysis and wide-search primary research.

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.

Convenience Retailing 2016 report – Institute of Grocery Distribution
This report is compiled by the IGD based on the sales data up to the end of April 2016.

Convenience Tracking Programme 2016 – 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-2015 UK Population estimates.

Communities data – ComRes
Interviewed counsellors, consumers and MPs.

Councillors – Interviewed 403 local councillors in Britain online between 11th April and 6th May 2016. Data was weighted by party and region to be representative of all councillors in Britain.

Consumers – Interviewed 2,089 adults in Britain between 15th April and 17th April 2016. The sample has been weighted to be nationally representative of the population in Great Britain.

MPs – Interviewed a representative sample of 150 MPs between 8th October 2015 and 12th November 2015, using a combination of paper and online surveys.

ACS Investment Tracker – Data obtained in the form of two surveys:
Voice of Local Shops survey – a sample of 1,210, independently owned convenience store businesses in the UK. ACS contracted him! research and consulting to aid in the design and delivery of the survey.

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 the Local Shop Survey, where relevant, to ensure consistency of results.

The results of these two surveys are collated and combined according to the proportion of non-affiliated 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 (February 2016 to November 2016) unless stated otherwise.

ACS Colleague Survey – A sample of 1,252 staff working within the convenience sector. The sample consists of people working for both independent and multiple retailers and results have been weighted to be nationally representative.

References

The Modern Local Shop (page 3) – percentages for 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).

Gross Value Added is the value of goods and services produced in an area, industry or sector of an economy. This was calculated by calculating the GVA as a percentage of sales for typical shops using the ACS Costs Barometer and multiplying this by the total value of sales as given in the IGD Convenience Retailing 2016 report.

Shops (page 6-7)
- Store numbers- figures sourced from WRBM. Totals for symbols and independents have been restated for 2015 due to a significant number of Bestway retail club stores moving from symbols to the independent category.
- Store figures were divided by the mid-2015 population estimates to obtain population per store.
- When calculating store size, "don't know" responses have been excluded.
- Shop ownership – ACS calculation based on figures sourced from WRBM.
- Premises ownership – Figures for non-affiliated Indies, symbol independents, independent forecourts and multiples were collated and combined according to their proportion of stores in the market. When calculating ownership "Some of the properties are owned and some are rented" responses have been excluded.
- Lease agreement – Results are based on retailers who own their stores.

Sales (page 8-9)
- Store ownership/share of sales – figures sourced from the IGD Convenience Retailing 2016 report.
- Sales/ market share – figures sourced from the IGD Convenience Retailing 2016 report.
- Shop categories – figures sources from the IGD Convenience Retailing 2016 report.

Investment (page 10-11)
- Investment per quarter – Average investment per store was obtained from the Voice of the Local Shops Survey for 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 non-affiliated independents and independent symbol groups the data was obtained from the Voice of the Local Shops Survey and for multiples, results were obtained from the Multiple Investment Tracker survey. Both surveys asked "in your store, which of the following areas have you made investment in over the last three months?" Results for non-affiliated 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 2016 to November 2016) 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 0-999 sq. ft., 1000-1999 sq. ft. and 2000-3000 sq. ft. The results for non-affiliated independents, symbol group members, independent forecourts and multiples were collated and combined according to their proportion of stores in the market.
- Sources of investment – Data was obtained using the Voice of the Local Shops, respondents were asked to report their main source of investment over the last three months. Results reflects statistics for independent retailers (including those who own symbol stores) only. Results were calculated for the latest four quarters (February 2016 to November 2016) and an overall average was taken.

Features (page 12-13)
- All numbers except EPoS: ACS independents and Multiples surveys asked respondents to list which of a selection of services were offered in-store. Results for non-affiliated 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.
- For the EPoS figure data was obtained for independent retailers using the Voice of the Local Shops Survey, November 2016. 1,210 Independent retailers were asked "Does your till system scan bar codes as part of a Point of Sale system?". Multiples figure was taken from the ACS Multiples Survey. Result for non-affiliated independents, symbol groups and multiples were collated and combined according to their proportion of stores in the market.

Jobs (page 14-15)
- Jobs – Per store employment figures obtained from ACS Independents and Multiple surveys. Results for non-affiliated independents, symbol group members, 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): 3.27.
- Independently owned symbol stores (excluding forecourts): 6.91.
- Independently owned forecourts: 8.57.
- Multiples (Inc. co-operatives, forecourt multiples, multiple owned symbol stores): 18.9.
- Store average: 8.16.

- People – Data for age and gender statistics, hours worked, length of employment and holiday were obtained from ACS Independents and Multiple surveys and were collated and combined according to their proportion of stores in the market. Data for family employment statistics are based on the ACS Independent Survey only.

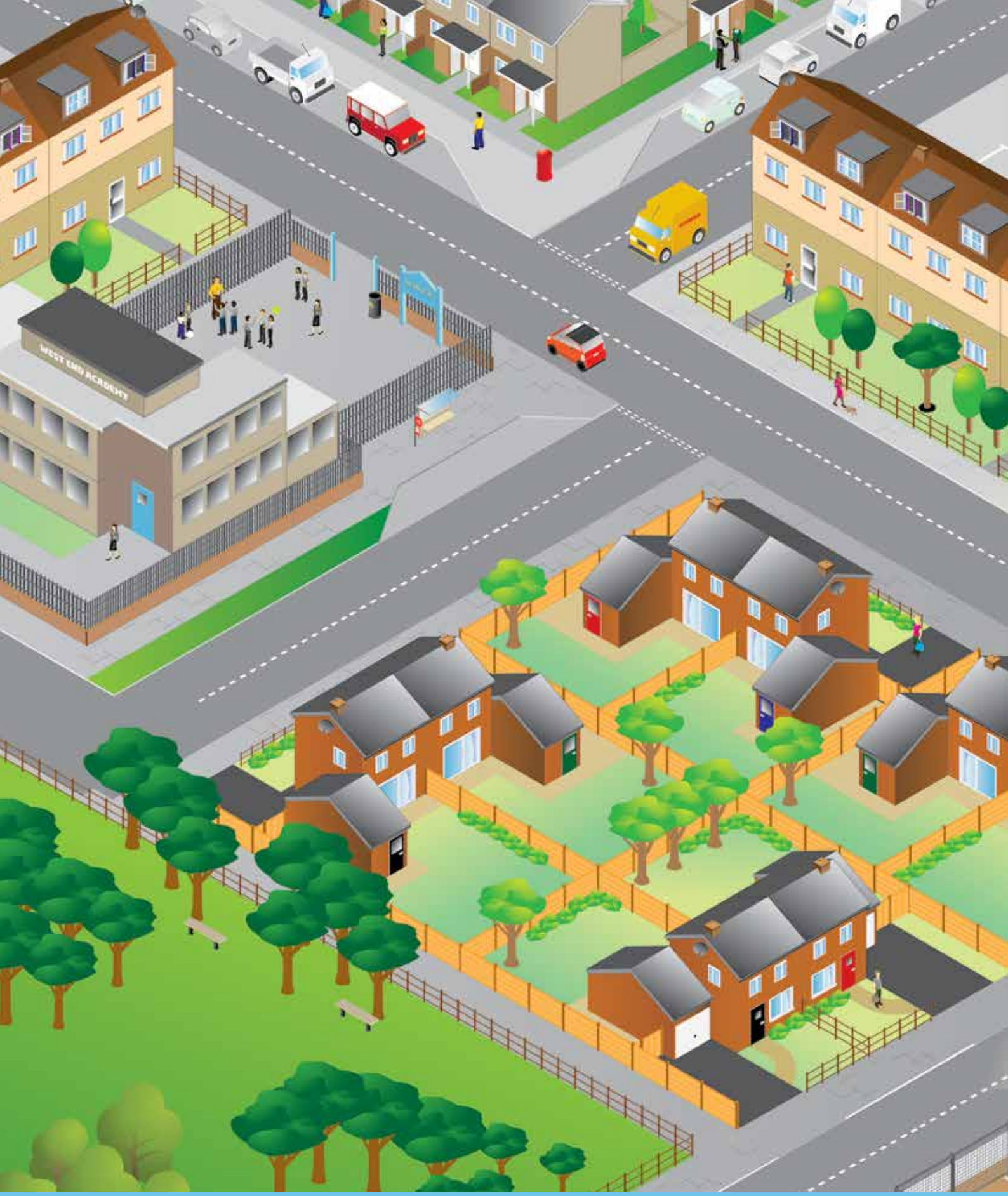
- Data for travel, income and commitments were obtained from the ACS colleague survey.

- Qualifications – ACS Independents and Multiples surveys asked respondents to list which qualifications were offered to staff. Results for non-affiliated independents, symbol group members, 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.

Entrepreneurs (page 16-17)
- All data in this section was obtained from the ACS Independents Survey and reflects statistics for independent retailers (including those who own symbol stores) only.
- 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.

Communities (page 18-19)
- Most positive impact – Respondents were given the following request "Which of the following types of services do you believe has the most positive impact on your local area? Select the three which you think have the most positive impact". Data was weighted to be nationally representative and answers were ranked to reflect opinion.
- Top three most wanted services- Respondents were given the following request "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". Data was weighted to be national representative and answers were ranked to reflect opinion.
- Community activity of shop keepers – Data was obtained from averaging the results from the most recent four ACS VOLS surveys (February 2016 to November 2016) and reflects statistics for independent retailers (including those who own symbols stores) only.

Customers (page 20-21)
- All data in this section was obtained from him! CTP 2016.



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:

him! research & consulting · William Reed · nielsen · IGD · ComRes

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