THE LOCAL SHOP REPORT 2015

A report by the Association of Convenience Stores
The 2015 Local Shop Report is the fourth edition of our comprehensive report on the continuing success of the convenience sector. The report continues to build on the strength of our previous publications, providing a deep and wide ranging understanding of the people who run convenience stores, their staff and customers.

In this year’s report, we have included a new chapter focused on the community value of local shops. We look at what retailers are doing in their communities, along with how convenience stores fare compared to other services on the high street.

This report brings together data from well-respected research organisations such as him! Research and Consulting, the Institute of Grocery Distribution, Nielsen, ComRes and William Reed Business Media with new research designed and commissioned by ACS. Together, this data provides our richest ever picture of the economic and social value of local shops.

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’s 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

#LocalShopReport

CONVENIENCE STORES - THE MODERN LOCAL SHOP

The value the convenience sector adds to the economy in Gross Value Added is just over £5bn. That’s over 6% of all UK RETAIL......

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

The modern local shop has developed along 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 premise - 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 the UK.

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);
• Non-affiliated independents – these tend to be the smallest businesses in the market.

CONVENIENCE STORES - THE MODERN LOCAL SHOP
There are 51,524 convenience stores in mainland UK:
- 5,602 in Scotland.
- 3,189 in Wales.

Scotland has more shops per head than any other part of the UK with one shop for every 940 people.
- 75% of local shops are owned and operated by small business owners.
- 61% of independent stores are under 1,000 sq ft, compared to just 17% of multiple stores.
- 65% of independent retailers own the premises they operate from.

The total value of sales in the convenience sector in the year to April 2015 was £37.7 billion.

Turnover in the convenience sector has grown by over 5% over the last year.

Sales by ownership:
- Symbol groups account for 38.1% of sales in the sector.
- Multiple chains and co-operatives account for 33.6% of total sales.
- Non-affiliated independents account for 17.4% of sales.

Sales by category:
- Chilled and fresh fruit and veg accounts for 19.7% of sales.
- Bread and bakery accounts for 5.3% of sales.
- Sandwiches account for 2.9% of sales.
- 92% of stores have some form of refrigeration in-store.

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

The overwhelming majority of local shops (75%) are run by small business owners. The sector is also very entrepreneurial, with over seven in ten being the first person in their family to own or run a convenience store and an increasingly large number (13%) being 18 or under.

Among this group:
- 32% are women.
- 23% have been in the business for more than 26 years.
- 36% own the business in partnership with family members.

Convenience store owners work very long hours, with 25% of shop owners working more than 70 hours per week while 20% take no holiday in the year at all.

Ethnicity
- Just over half of business owners describe themselves as White British (51%) while just under half are Asian or British Asian (45%).

There are significant variations between regions; in London 83% of independent retailers are Asian, whereas this number is only 12% in the South West.

Other than English, the predominant languages spoken by retailers are Bengali, Punjabi and Kashmiri. In Wales, 38% of independent retailers are Asian or British White British (51%).

Convenience store owners make first aid training available to nearly all their staff, while 35% of convenience stores offer food safety training.

The customer base of local shops is 54% female / 44% male.

25% of customers use their local shop every day.

78% of customers travel less than a mile to use their local store.

58% of customers travel to their store by foot, compared to 38% who drive.

The customer base of local shops is 54% female / 44% male.

25% of customers use their local shop every day.
There is a significant difference between stores operated by multiple companies and by independent retailers. Multiple and co-operative owned stores tend to be larger, while the vast majority of independent stores are under 2,000 sq ft.

There are a small number of multiple and co-operative owned stores which are over 3,000 sq ft, but these have not been included for the purposes of this report.

Scotland has more shops per head than any other part of the UK.

75% of convenience stores are run by independent retailers.

### Shop Numbers

<table>
<thead>
<tr>
<th>Region</th>
<th>Number of Shops</th>
<th>One shop per</th>
<th>Population per shop</th>
</tr>
</thead>
<tbody>
<tr>
<td>Scotland</td>
<td>5,602</td>
<td>946 people</td>
<td></td>
</tr>
<tr>
<td>North West</td>
<td>5,686</td>
<td>1,248 people</td>
<td></td>
</tr>
<tr>
<td>Wales</td>
<td>3,167</td>
<td>816 people</td>
<td></td>
</tr>
<tr>
<td>West Midlands</td>
<td>4,824</td>
<td>1,192 people</td>
<td></td>
</tr>
<tr>
<td>South West</td>
<td>4,876</td>
<td>1,197 people</td>
<td></td>
</tr>
<tr>
<td>South East</td>
<td>6,419</td>
<td>1,367 people</td>
<td></td>
</tr>
<tr>
<td>North East</td>
<td>2,265</td>
<td>1,146 people</td>
<td></td>
</tr>
<tr>
<td>East Midlands</td>
<td>3,874</td>
<td>1,187 people</td>
<td></td>
</tr>
<tr>
<td>Yorkshire / Humber</td>
<td>3,897</td>
<td>1,390 people</td>
<td></td>
</tr>
<tr>
<td>London</td>
<td>6,551</td>
<td>1,206 people</td>
<td></td>
</tr>
<tr>
<td>East London</td>
<td>4,363</td>
<td>1,197 people</td>
<td></td>
</tr>
<tr>
<td>England Total</td>
<td>42,755</td>
<td>1,270 people</td>
<td></td>
</tr>
</tbody>
</table>

### Shop Ownership

The vast majority of shops in the convenience sector are owned and operated by small business owners or ‘independents’. Together independents operate 75% of the shops in the sector.

The ‘symbol’ groups are predominantly groups of independent retailers trading under a common customer facing brand – familiar symbol group brands include Spar, Costcutter, Londis, Nisa Local, Premier, Mace and Best One. There are more than 16,000 shops run by independent retailers that choose to trade in this way. However there are also more than 1,000 stores that trade under these brands but are chains of 10 or more stores run from a centralised 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 17% of the convenience sector.

### Premises Ownership

- 65% of convenience stores are owned
- 35% of convenience stores are rented

Source: ACS Survey of Independent Retailers 2014
There is significant variety in the products offered in different types of store, depending on their size, location and ownership type. The chart below shows the average sales contribution made by product category.

There have been significant changes in the prevalence of these categories in-store over the last year – for more information on comparisons go to pages 20-21.

### SHOP CATEGORIES

<table>
<thead>
<tr>
<th>Category</th>
<th>Market Share</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tobacco</td>
<td>13.8%</td>
</tr>
<tr>
<td>Alcoholic</td>
<td>13.4%</td>
</tr>
<tr>
<td>Chilled foods</td>
<td>7.4%</td>
</tr>
<tr>
<td>Canned &amp; packaged food</td>
<td>7.4%</td>
</tr>
<tr>
<td>Soft drinks</td>
<td>6.6%</td>
</tr>
<tr>
<td>Fruit &amp; veg</td>
<td>6.3%</td>
</tr>
<tr>
<td>Confectionery</td>
<td>5.7%</td>
</tr>
<tr>
<td>Bread &amp; bakery</td>
<td>5.3%</td>
</tr>
<tr>
<td>Non-food</td>
<td>3.7%</td>
</tr>
<tr>
<td>News &amp; magazines</td>
<td>3.2%</td>
</tr>
<tr>
<td>Milk</td>
<td>3.0%</td>
</tr>
<tr>
<td>Sandwiches</td>
<td>2.9%</td>
</tr>
<tr>
<td>Savoury snacks</td>
<td>2.9%</td>
</tr>
<tr>
<td>Household</td>
<td>2.3%</td>
</tr>
<tr>
<td>Health &amp; beauty</td>
<td>2.0%</td>
</tr>
<tr>
<td>DIY</td>
<td>1.7%</td>
</tr>
<tr>
<td>Frozen</td>
<td>1.1%</td>
</tr>
</tbody>
</table>

**Source:** IGD 2015

### SALES

**£37.7 billion Turnover grew by...**

**Total value of sales in the convenience sector for the year to April 2015**

This amounts to over **ONE FIFTH** of the total grocery market

**£37.7 billion**

**Over 5%**

**between 2014 and 2015**

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**MARKET SHARE OF SALES**

- Forecourts: 38.1%
- Multiples: 11.8%
- Symbol groups: 10.9%
- Non-affiliated independents: 17.4%
- Co-operatives: 21.8%

**Key:**

<table>
<thead>
<tr>
<th>Category</th>
<th>Sales 2015 (£bn)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Forecourts</td>
<td>£14.6bn</td>
</tr>
<tr>
<td>Multiples</td>
<td>£8.2bn</td>
</tr>
<tr>
<td>Symbol groups</td>
<td>£6.8bn</td>
</tr>
<tr>
<td>Co-operatives</td>
<td>£4.1bn</td>
</tr>
<tr>
<td>Non-affiliated independents</td>
<td>£6.6bn</td>
</tr>
</tbody>
</table>

**Source:** IGD 2015

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**REFRIGERATION**

- **0m**
- **UP TO 5m**
- **BETWEEN 5m & 10m**
- **MORE THAN 10m**

**Source:** ACS/Feefo 2015
Convenience stores now offer a wide range of services and features in-store for their customers. The following data shows the percentage of the sector that incorporates each feature in-store.

**FEATURES**
- **BEHIND THE COUNTER**
  - Mobile phone top up: 80%
  - Lottery: 77%
  - Cash back: 54%
  - Loyalty card: 27%
  - Bill payment services: 53%
  - EPoS: 53%
  - Car Wash: 6%
  - Prescription collections: 1%
  - Self serve checkout: 1%

- **FOOD AND DRINK**
  - Loyalty card: 27%
  - EPoS: 53%
  - Mobile phone top up: 80%
  - Cash back: 54%
  - Lottery: 27%
  - Bill payment services: 53%
  - Mobile phone top up: 80%
  - Cash back: 54%
  - Lottery: 27%
  - EPoS: 53%
  - Car Wash: 6%
  - Mobile phone top up: 80%
  - Cash back: 54%
  - Lottery: 27%
  - EPoS: 53%
  - Car Wash: 6%

- **SERVICES**
  - Free to use cash machine: 38%
  - Parcel services: 26%
  - Recycling services: 26%
  - Post office: 20%
  - Charged cash machine: 16%
  - Home news delivery: 15%
  - Click and collect: 13%
  - Local grocery delivery: 11%
  - Online food delivery: 11%
  - Photo booth: 4%

- **TECHNOLOGY**
  - Chiller doors: 48%
  - Contactless payment: 33%
  - Smart meter: 27%
  - Store website: 25%
  - Facebook: 23%
  - Twitter: 20%
  - Digital advertising screens: 14%
  - LED lights: 12%
  - In-store Wi-Fi: 5%
  - Digital chill edge labels: 3%
  - Solar panels: 12%

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All data on this spread – source: ACS/him! 2015
Convenience stores provide over **407,000** jobs in mainland UK

35% of shops offer food safety training

48,000 people

### CONVENIENCE STORE SECTOR JOBS

<table>
<thead>
<tr>
<th>Region</th>
<th>Jobs</th>
</tr>
</thead>
<tbody>
<tr>
<td>Scotland</td>
<td>44,332</td>
</tr>
<tr>
<td>North West</td>
<td>44,997</td>
</tr>
<tr>
<td>Wales</td>
<td>25,063</td>
</tr>
<tr>
<td>West Midlands</td>
<td>38,175</td>
</tr>
<tr>
<td>South West</td>
<td>38,587</td>
</tr>
<tr>
<td>North East</td>
<td>17,924</td>
</tr>
<tr>
<td>East Midlands</td>
<td>30,657</td>
</tr>
<tr>
<td>Yorks. / Humber</td>
<td>30,839</td>
</tr>
<tr>
<td>Eastern</td>
<td>34,527</td>
</tr>
<tr>
<td>England Total</td>
<td>338,348</td>
</tr>
<tr>
<td>England Total Key</td>
<td></td>
</tr>
</tbody>
</table>

### JOBS

- Convenience stores provide over **407,000** jobs in mainland UK.
- **35%** of shops offer food safety training.
- Independent shops alone make first aid training available to nearly **48,000** people.

**All data on this spread – source: ACS/him! 2015**

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### PEOPLE

**GENDER PROFILE**

- **37%** male
- **63%** female

**AGE PROFILE**

- **22%** 16-24 years old
- **11%** Over 60 years old

**FAMILY EMPLOYMENT**

- **54%** Employ at least one other family member
- **46%** Employ no family members

**HOURS WORKED**

- **36%** 0-16
- **27%** 17-30
- **23%** 31-40
- **14%** 40+

**LENGTH OF EMPLOYMENT**

- **17%** Less than one year
- **38%** One to five years
- **22%** Six to ten years
- **23%** More than ten years

All data on this spread – source: ACS/him! 2015
25% of shop owners work more than 70 hours per week.

23% of shop owners have been in the business for more than 25 years.

36% of businesses are owned by family partnerships.

20% of shop owners take no holiday per year.

**Ethnicity of Owners**

- **Scotland**: Asian or Asian British 62%, White British 23%, Other 11%, Born in UK 20%
- **North East**: Asian or Asian British 48%, White British 32%, Other 11%, Born in UK 70%
- **North West**: Asian or Asian British 22%, White British 56%, Other 12%, Born in UK 60%
- **Yorkshire & Humberside**: Asian or Asian British 23%, White British 48%, Other 12%, Born in UK 62%
- **Wales**: Asian or Asian British 31%, White British 39%, Other 11%, Born in UK 64%
- **West Midlands**: Asian or Asian British 19%, White British 51%, Other 15%, Born in UK 62%
- **South West**: Asian or Asian British 16%, White British 56%, Other 11%, Born in UK 66%
- **London**: Asian or Asian British 35%, White British 27%, Other 20%, Born in UK 64%
- **England Total**: Asian or Asian British 48%, White British 43%, Other 12%, Born in UK 74%
- **Eastern**: Asian or Asian British 50%, White British 35%, Other 11%, Born in UK 63%
- **Yorks. & Humber**: Asian or Asian British 31%, White British 48%, Other 12%, Born in UK 62%
- **Eastern**: Asian or Asian British 53%, White British 30%, Other 8%, Born in UK 63%

**Ownership Age Profile**

- 18-30: 15%
- 31-40: 22%
- 41-50: 27%
- 51-60: 12%
- 60+: 12%

**Ownership Gender Profile**

- Male: 68%
- Female: 32%

**Business Profile**

- 71% First time investor
- 29% Inherited family business

**Time in Business**

- 5 years or less: 18%
- 6 to 10 years: 14%
- 11 to 15 years: 9%
- 16 to 20 years: 15%
- 21 to 25 years: 16%
- More than 25 years: 21%

All data on this spread – source: ACS/ HIM! 2015
**COMMUNITIES**

**MOST POSITIVE IMPACT ON LOCAL AREA**

- 1st: Post Offices
- 2nd: Convenience Stores
- 3rd: Pharmacies
- 4th: Coffee Shops
- 5th: Specialist Food Shops
- 6th: Restaurants
- 7th: Pubs/Bars
- 8th: Banks
- 9th: Fast Food/ Takeaways
- 10th: Charity Shops
- 11th: Betting Shops
- 12th: Pawnbrokers

**TOP THREE MOST WANTED SERVICES**

- 1st: Specialist Food Shops
- 2nd: Banks
- 3rd: Post Offices

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**COMMUNITY ACTIVITY**

- **MAINLAND UK**
  - 83% of independent retailers engaged in some form of community activity in the past year

- **TOTAL COMMUNITY ACTIVITY BY REGION**
  - **SCOTLAND**: 87%
  - **NORTH EAST**: 81%
  - **YORKS./HUMBER**: 85%
  - **NORTH WEST**: 84%
  - **EAST MIDLANDS**: 83%
  - **EASTERN**: 84%
  - **WALES**: 86%
  - **SOUTH EAST**: 82%
  - **SOUTH WEST**: 90%
  - **WEST MIDLANDS**: 84%
  - **LONDON**: 71%

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All data on this page – source: ACS/ComRes 2015.
CUSTOMERS

AGE OF POPULATION / AGE OF SHOPPERS

Gender Profile

44% Female 56% Male

Social Groups

17% A8 31% C1 25% C2 27% DE 52% ABC1 (net) 48% C2DE (net)

CUSTOMER PROFILE

81% of customers pay by cash

the average spend is £6.45

44% work full time

17% are buying on special offer

CUSTOMER PROFILE

Age of Population / Age of Shoppers

75% 13% 7%
65-74 7%
55-64 14%
45-54 15%
35-44 15%
25-34 16%
16-24 15%

Gender Profile

44% Female 56% Male

Social Groups

17% A8 31% C1 25% C2 27% DE 52% ABC1 (net) 48% C2DE (net)

SHOPPER PROFILES

Single Person

27%

Couples with Young Children

23%

Busy Provider

16%

Child-Free Couples

16%

Retired

22%

CUSTOMER PROFILE

Age of Population / Age of Shoppers

75% 13% 7%
65-74 7%
55-64 14%
45-54 15%
35-44 15%
25-34 16%
16-24 15%

Gender Profile

44% Female 56% Male

Social Groups

17% A8 31% C1 25% C2 27% DE 52% ABC1 (net) 48% C2DE (net)

SHOPPER PROFILES

Single Person

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Busy Provider

16%

Child-Free Couples

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Retired

22%

CUSTOMER PROFILE

Age of Population / Age of Shoppers

75% 13% 7%
65-74 7%
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44% Female 56% Male

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17% A8 31% C1 25% C2 27% DE 52% ABC1 (net) 48% C2DE (net)

SHOPPER PROFILES

Single Person

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23%

Busy Provider

16%

Child-Free Couples

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Retired

22%

CUSTOMER PROFILE

Age of Population / Age of Shoppers

75% 13% 7%
65-74 7%
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45-54 15%
35-44 15%
25-34 16%
16-24 15%

Gender Profile

44% Female 56% Male

Social Groups

17% A8 31% C1 25% C2 27% DE 52% ABC1 (net) 48% C2DE (net)

SHOPPER PROFILES

Single Person

27%

Couples with Young Children

23%

Busy Provider

16%

Child-Free Couples

16%

Retired

22%
This page shows some of the significant changes between 2014 and 2015 Local Shop Reports. More detailed comparisons of the two reports are available to ACS members. Contact details are on the back page of this report.

**COMPARISONS**

**STORE NUMBERS**

<table>
<thead>
<tr>
<th></th>
<th>2014</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>Convenience stores across the UK</td>
<td>50,747</td>
<td>51,524</td>
</tr>
</tbody>
</table>

That's a net growth rate of over two shops per day

**JOBS**

|  | 2014: 386,710 | 2015: 407,743 |

**DISTANCE TRAVELLED TO STORE**

Customers travelling more than a mile:

<table>
<thead>
<tr>
<th></th>
<th>2014</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>19%</td>
<td>22%</td>
<td></td>
</tr>
</tbody>
</table>

25% of customers visit their local shop every day (24% in 2014)

**AVERAGE SPEND**


**ENTREPRENEURS**

<table>
<thead>
<tr>
<th>Age Group</th>
<th>2014</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>Aged 18-30</td>
<td>11%</td>
<td>15%</td>
</tr>
</tbody>
</table>

**SALES**

| Type | Multiple | Co-ops | Symbol groups | Non-affiliated Forecast | independents |
|---|---|---|---|---|
| Sales growth | +13.1% | +7.3% | +3.9% | +0.5% | +0.1% |

**SHOP CATEGORIES**

**REFRIGERATION**

<table>
<thead>
<tr>
<th>2014</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>5%</td>
<td>8%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>2014</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>0m</td>
<td>0m</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>2014</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>MORE THAN 10m</td>
<td>MORE THAN 10m</td>
</tr>
</tbody>
</table>

**FASTEST GROWING SHOPPER PROFILE**

<table>
<thead>
<tr>
<th>Category</th>
<th>2014</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>Couples with young children</td>
<td>19%</td>
<td>23%</td>
</tr>
<tr>
<td>Most days or every day</td>
<td>36%</td>
<td>39%</td>
</tr>
</tbody>
</table>

**VISIT FREQUENCY**

**SOURCE:** IGD 2015
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 2,421 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 25th June and 16th July 2015. The survey gathered responses from non-affiliated independent convenience stores and independent stores that are part of central sourcing 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 peter.lattas@acs.org.uk.

The results of these two surveys collated and combined figures for non-affiliated independents, symbol group members and multiples according to their proportion of stores in the market, in order to determine overall results for the sector.

Nielsen and William Reed Business Media sector data

Nielsen values use reference data from trade associations, retailers, suppliers and customer lists. This is supplemented by gap analyses and wide-search primary research. WRBM continually updates data through re-registering customers thereby adding changing recipients, closures and new stores. This is through postal, telephone research, online delivery and events.

Convenience Retailing 2014 report – Institute of Grocery Distribution

This report is compiled by the IGD based on the sales data up to the end of 2013.

Convenience Tracking Programme – him! Research and Consulting

This programme is a survey of over 20,000 convenience shoppers conducted at the ‘moment of truth’ in-store. References are to the 2015 survey (unless otherwise referenced).

Population data – The Office for National Statistics

Data is taken from mid-2014 UK Population Estimates.

Communities data – ComRes

ComRes interviewed 2,067 adults in Great Britain online between 22nd May and 25th May 2015. ComRes is a member of the British Polling Council and is accredited by the Electoral Reform Society. Data tables are available online on the ComRes website.

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: 20 people per sq km.
• Suburban density: 10-20.
• Rural density: 0-10.

Grocery 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 Cost Ramenster and multiplying this by the total value of sales as given in the IGD Convenience Retailing 2015 Report.

Shops (page 6-7)

• More numbers sourced from WRBM. These figures were divided by the mid-2014 CMS regional population estimates to obtain population per shop.
• When calculating store size, don’t let sales responses have been excluded.
• Store Ownership – ACS calculation based on figures sourced from WRBM.
• Premium Ownership – this figure relates to independent retailers only and is based on their response to the questionnaire in the survey.

Sales (page 8-9)

• Store ownership/share of sales – figures sourced from the IGD Convenience Retailing 2015 Report. IGD have rotated the size of the convenience channel to ensure all sales attributed to it are meeting 92% convenience store definition. This has resulted in some smaller stores now being represented as CTNs in the ‘Other’ channel.

• Sales/market share – figures sourced from the IGD Convenience Retailing 2015 Report.
• Shop categories – figures sourced from the IGD Convenience Retailing 2015 Report.
• Refrigeration – ACS Independents and Multiples surveys asked respondents to estimate how much refrigeration they provided in-store. Results for non-affiliated independents, symbol group members and multiples were collated and combined according to their proportion of stores in the market in order to determine overall results for the sector.

Features (page 10-11)

• All numbers, ACS Independents and Multiples surveys asked respondents to list which of a selection of offers were offered in-store. Results for non-affiliated independents, symbol group members and multiples were collated and combined according to their proportion of stores in the market, in order to determine overall results for the sector.

Jobs (page 12-13)

• Jobs – Per store employment figures obtained from ACS Independents and Multiples surveys. Results for non-affiliated independents, symbol group members and multiples were collated and combined according to their proportion of stores in the market, in order to determine overall results for the sector.

People (page 14-15)

• People – Data for age and gender statistics, household employment, hours worked, length of employment and employee flexibility was obtained from ACS Independents and Multiples surveys.

Qualifications – ACS Independents and Multiples surveys asked respondents to list which qualifications were offered in-store. Results for non-affiliated independents, symbol group members 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 14-15)

• All data in this section obtained from ACS Independents survey and reflects claims for independent retailers (excluding 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 16-17)

• Most positive impact – Members of the public were given the question and request “Which of the following types of services do you believe has the most positive impact upon your local area? Select the three which you think have the most positive impact”.
• Data were weighted to be nationally representative of the population in Great Britain. Results were then ranked to reflect national opinion.

• Top three most wanted services – Members of the public 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 were weighted to be nationally representative of the population in Great Britain. Results were then ranked to reflect national opinion.

Community activity of shopkeepers – Data was obtained from averaging results from the most recent four ACS VOLS surveys (May 2014 to May 2015) and reflects statistics for independent retailers (excluding those who own symbol stores only).

Customers (page 18-19)

• All data in this section was obtained from him! CTP 2015.
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:

For more details on this report, contact Chris Noice via email at chris.noice@acs.org.uk

For more details on ACS:
Visit: www.acs.org.uk
Call: 01252 515001
Follow us on Twitter: @ACS_Localshops