The **Local Shop** Report 2018

A report by the Association of Convenience Stores

#LocalShopReport

ACS the voice of local shops

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CONTENTS

INTRODUCTION

The Local Shop Report provides a comprehensive picture of the convenience sector, including detail on the stores themselves, the people working and running stores and the communities in which they trade.

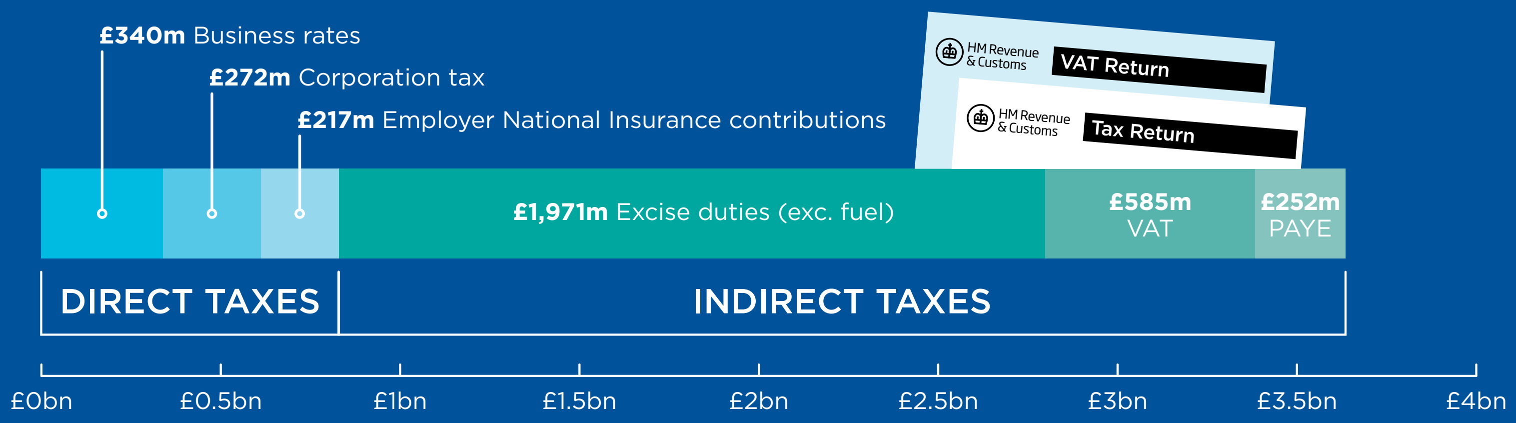
The information in this report is gathered from our own primary research, surveying 2,420 independent retailers in addition to multiple and co-operative businesses representing over 7,500 stores. The report also draws on data kindly supplied by Experian Catalist, HIM, IGD, Plunkett Foundation and William Reed.

Some of the figures in the report have been scaled to reflect the entire 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 CONVENIENCE SECTOR CONTRIBUTED**

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



Source: ACS / Retail Economics 2018

THERE ARE **46,262** CONVENIENCE STORES IN MAINLAND UK

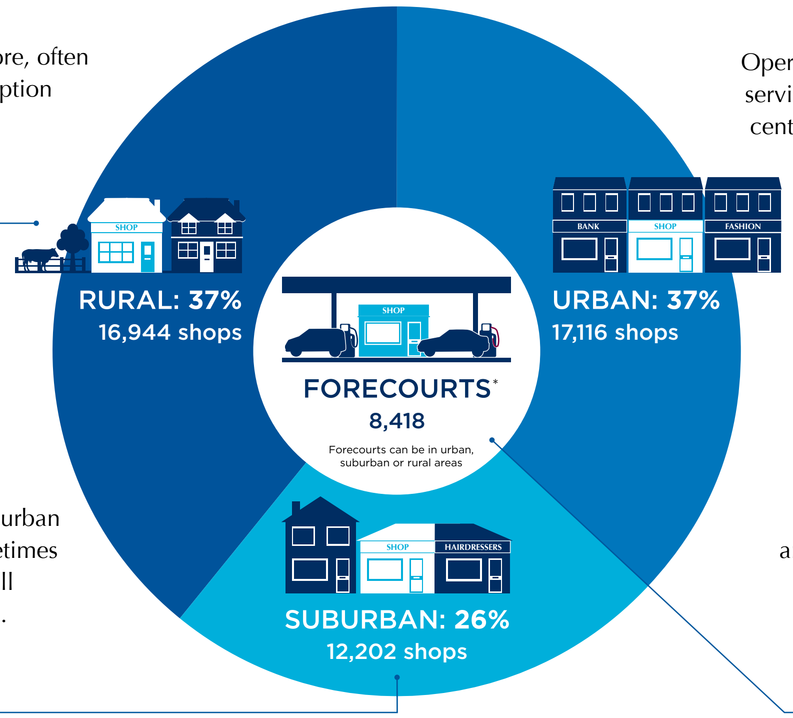
LOCATION

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.



SUBURBAN

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

FORECOURTS

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

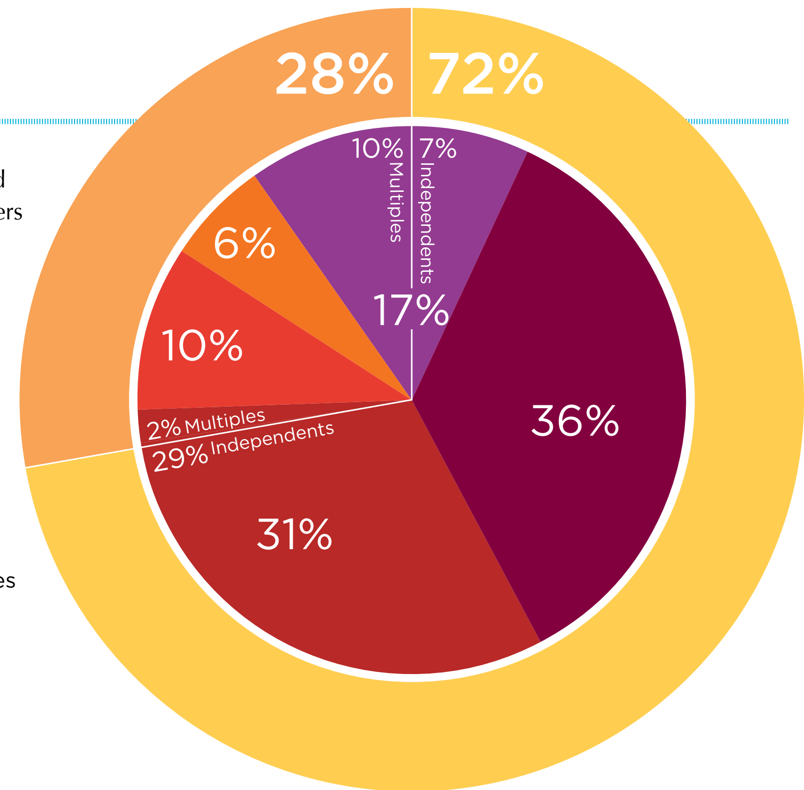
Source: WRBM 2018

* Source: Experian Catalist 2018

SHOP OWNERSHIP

The vast majority of shops in the convenience sector are owned and operated by small businesses. Together, independent retailers make up 72% of the convenience sector.

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 17% of the 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

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» 2018 HIGHLIGHTS

» SHOPS

THERE ARE 46,262 CONVENIENCE STORES IN MAINLAND UK

72% OF CONVENIENCE STORES ARE RUN BY INDEPENDENT RETAILERS

74% OF INDEPENDENT RETAILERS TRADE WITH LESS THAN FIVE OTHER RETAIL/SERVICE BUSINESSES CLOSE BY

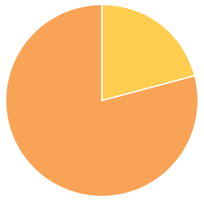
58% OF INDEPENDENT STORES ARE SMALLER THAN 1,000 SQUARE FEET

72% OF MULTIPLE OWNED STORES ARE LARGER THAN 1,000 SQUARE FEET

» SALES

TOTAL VALUE OF SALES £39.1bn = over one fifth of the total grocery market

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



By the end of 2018, sales are predicted to reach... £40.1bn

Typical convenience stores are open 7am until 11pm

OPENING TIME: AM

CLOSING TIME: PM

7% of stores are open 24 hours

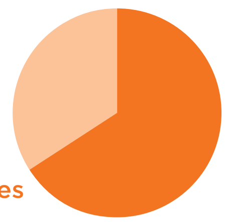
» INVESTMENT

TOP FIVE AREAS OF INVESTMENT

- Refrigeration **34%**
- Internal building maintenance **30%**
- Shelving **20%**
- Till systems (e.g. EPoS) **13%**
- In-store lighting **13%**

OVER THE LAST YEAR CONVENIENCE STORES HAVE INVESTED » £814m IN THEIR BUSINESSES

66% of independents are funding investment from their own reserves



» TECHNOLOGY & SERVICES

80% of stores offer contactless payment

- Parking 59%
- FREE Free to use cash machine 46%
- Parcel collection point 34%

81% of stores have an alcohol licence

» JOBS

CONVENIENCE STORES PROVIDE ALMOST 365,000 JOBS IN MAINLAND UK

Local Shop

24% of stores 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

24% OF SHOP OWNERS WORK MORE THAN 70 HOURS PER WEEK

28% have been in the business for more than 25 years

70% Started business | 30% Inherited family business

27% ARE UNDER THE AGE OF 40

» COMMUNITIES

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

46% of independent retailers have introduced a voluntary charge for plastic bags

MOST POSITIVE IMPACT ON LOCAL AREA

1. Post offices
2. Convenience stores
3. Pharmacies

TOP THREE MOST WANTED SERVICES

1. Specialist food shops
2. Banks
3. Post offices

» CUSTOMERS

THE AVERAGE SPEND IS £6.50

Customers aged 35-54 spend more per visit than any other age group £7.39

MODE OF TRAVEL TO STORES

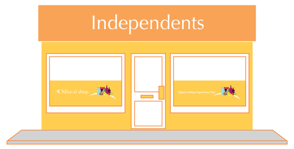
- 54% Walk/on foot
- 39% Drive
- 4% Public transport
- 2% Other

52% of convenience store customers travel less than ¼ mile to their store

THE AVERAGE SHOPPER VISITS THEIR LOCAL STORE 3.4 times per week

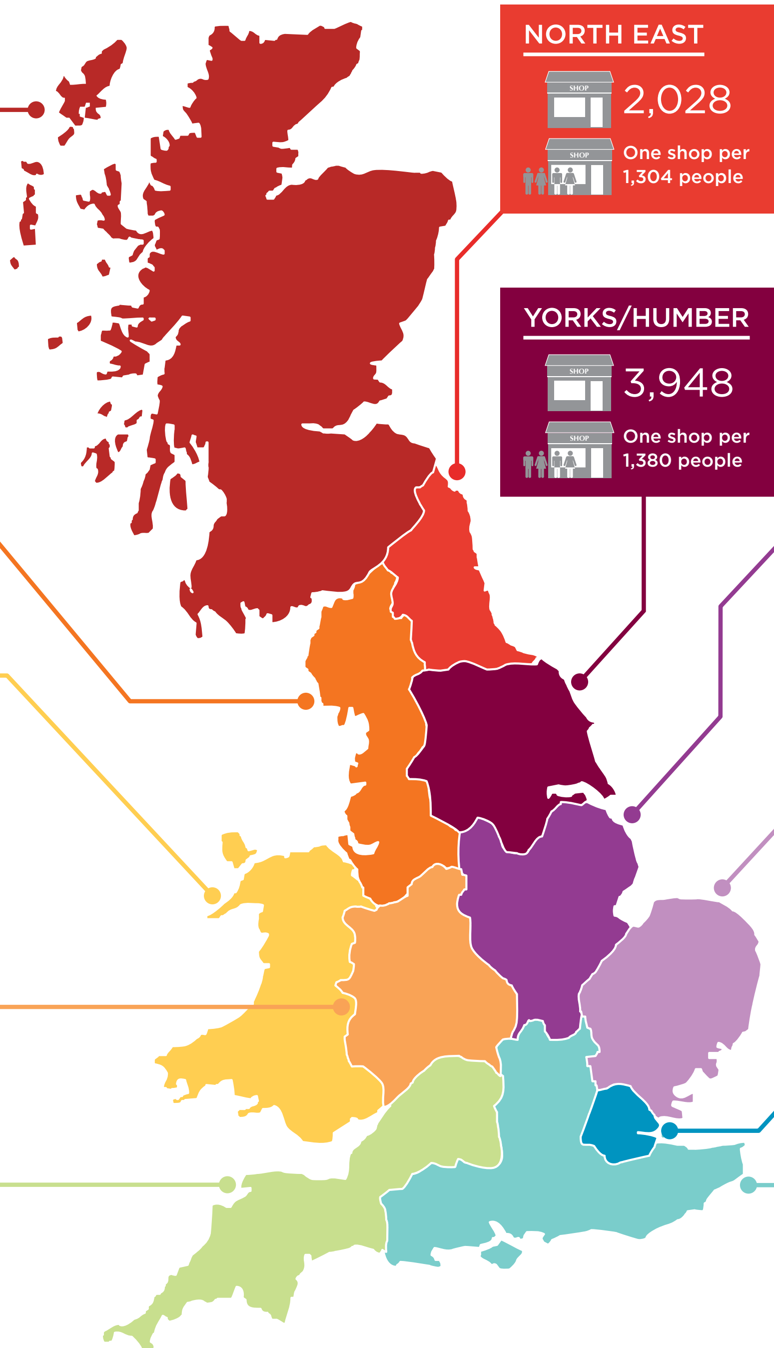
THERE ARE **46,262** CONVENIENCE STORES IN MAINLAND UK

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



72% of convenience stores are run by **INDEPENDENT** RETAILERS

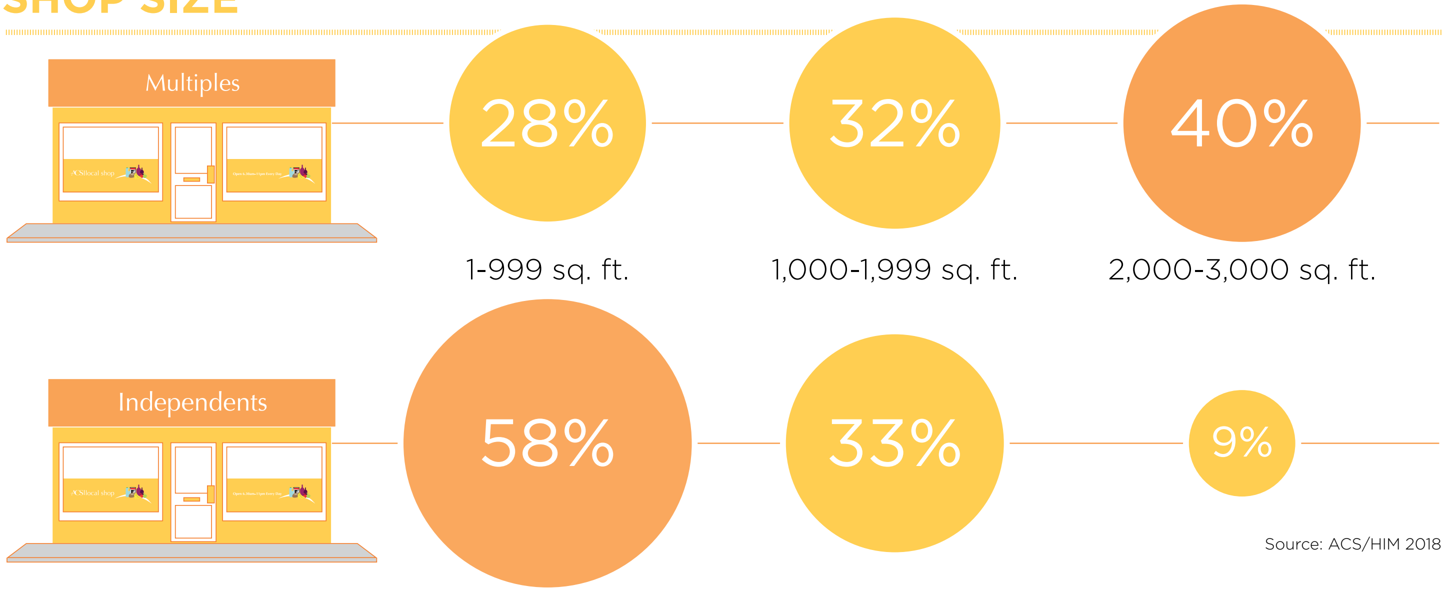
SHOP NUMBERS



Region	Shops	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	58%	33%	9%

Source: ACS/HIM 2018

NEIGHBOURING BUSINESSES

ISOLATED STORE — 38%
No other retail/service businesses close by.

LOCATED ON A SMALL PARADE — 36%
Up to five retail/service businesses close by.

LOCATED ON A LARGER PARADE OR A HIGH STREET — 14%
Up to 10 retail/service businesses close by.

LOCATED ON A MAIN HIGH STREET OR WITHIN A CITY CENTRE — 12%
More than 10 retail/service businesses close by.

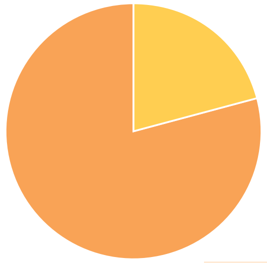
Source: ACS/HIM 2018 (independents only)

PREMISES OWNERSHIP

Source: ACS/HIM 2018 (independents only)

TOTAL VALUE OF SALES

£39.1bn =



over one fifth of the total grocery market

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

TURNOVER GREW 2.9% BETWEEN 2017 AND 2018

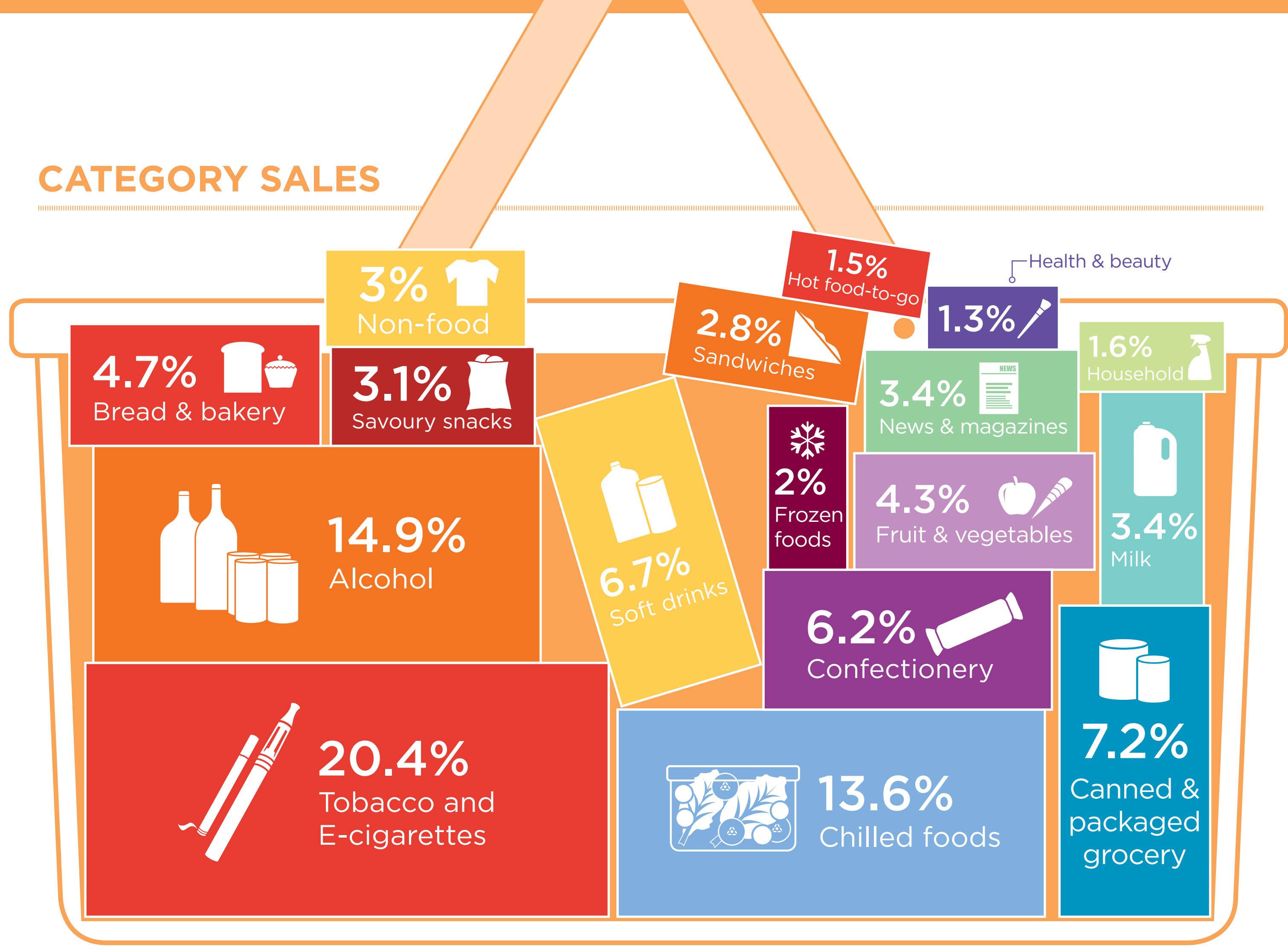
By the end of 2018, **sales are predicted** to reach... **£40.1bn**

SALES BY STORE TYPE

Market share	Store type	Sales per store (average)
38.0%	Symbols	£962,357
23.4%	Multiples	£1,997,596
16.6%	Unaffiliated Independents	£342,789
11.7%	Co-operatives	£1,688,864
10.4%	Forecourts	£992,667*

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

CATEGORY SALES



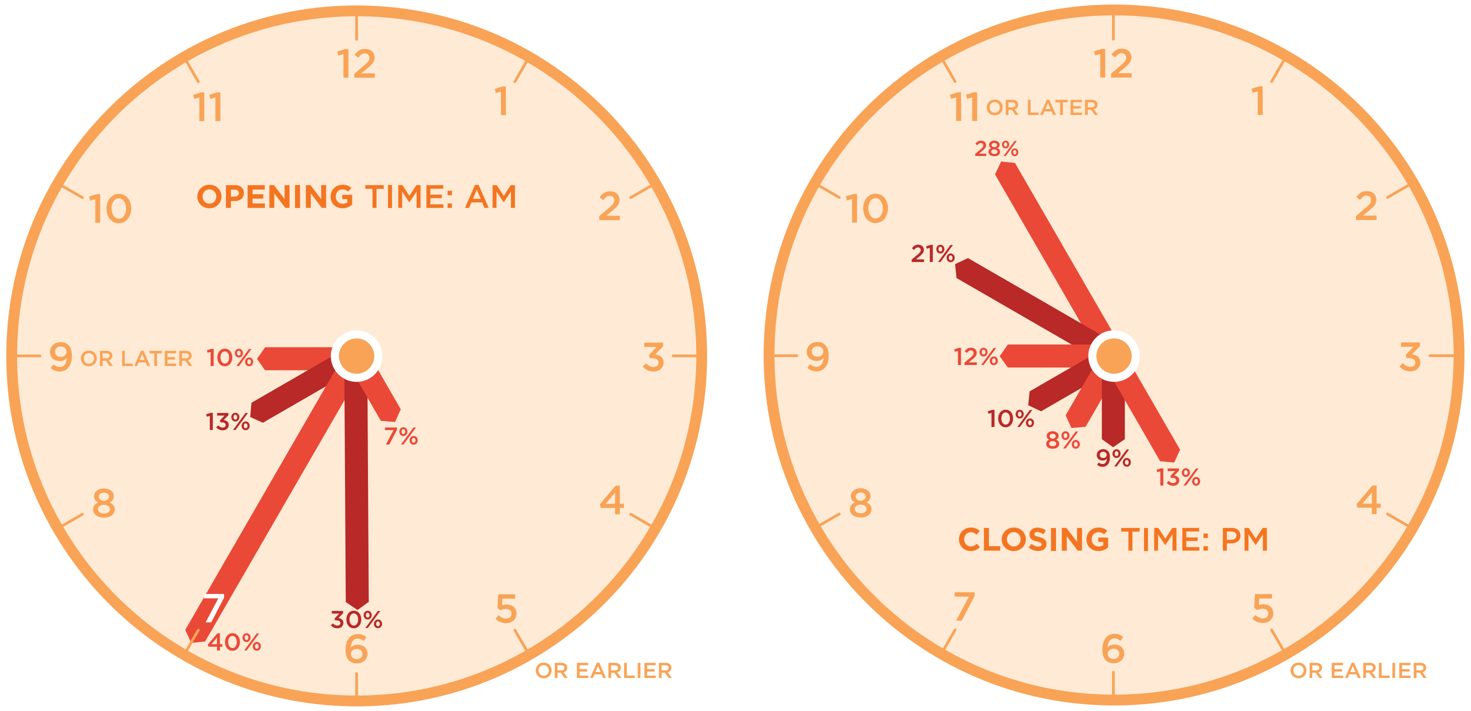
Source: IGD 2018

OPENING HOURS

7% of stores are open 24 hours

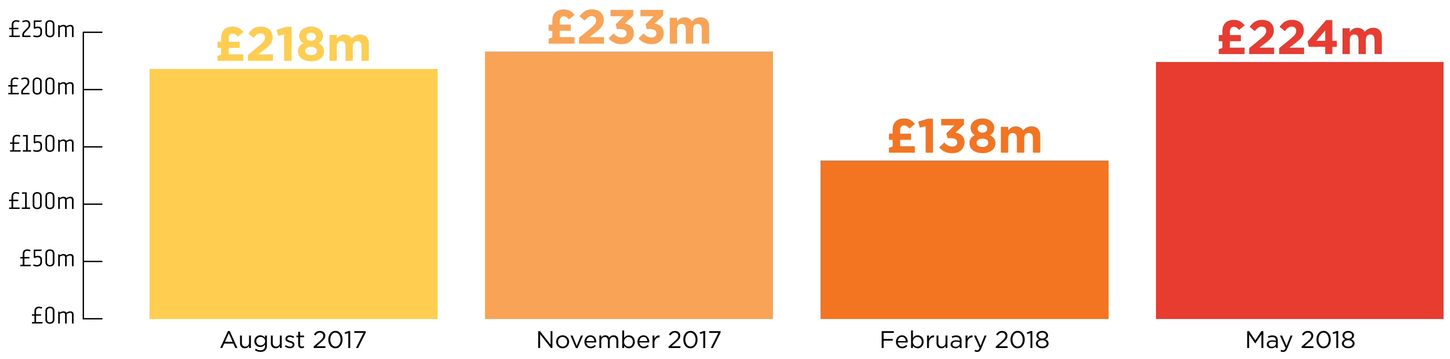
3% of stores are closed on Sunday

Average number of **hours open** per day: Mon-Sat: **14.5** Sun: **13.0**



OVER THE LAST YEAR CONVENIENCE STORES HAVE INVESTED » £814m IN THEIR BUSINESSES

INVESTMENT PER QUARTER



AVERAGE ANNUAL INVESTMENT BY STORE TYPE

Unaffiliated independents: £7,262

Symbols: £13,636

Multiples: £38,331

PERCENTAGE OF STORES INVESTING

21% Unaffiliated independents

25% Symbols

53% Multiples

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 **34%**
- Internal building maintenance **30%**
- Shelving **20%**
- Till systems (e.g. EPoS) **13%**
- In-store lighting **13%**
- Freezer space **12%**
- Air-conditioning **11%**
- Store signage **10%**
- Crime prevention measures **9%**
- Full store refits **8%**
- Internal building development **7%**
- Improving store access **3%**
- Parking provision **2%**

Source: ACS Investment Tracker 2017/18

AMOUNT OF REFRIGERATION

STORE SIZE	UP TO 5m	BETWEEN 5m & 10m	BETWEEN 10m & 15m	MORE THAN 15m
FOR STORES 1-999 sq. ft.	39%	33%	24%	4%
FOR STORES 1,000-1,999 sq. ft.	24%	35%	30%	11%
FOR STORES 2,000-3,000 sq. ft.	22%	19%	18%	41%

Source: ACS/HIM 2018

All data on this page - source: ACS Investment Tracker 2017/18 (Sources of Investment refers to independents only)

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

Feature or service	% of stores
Mobile phone top-up	85%
Lottery	82%
Licensing – Alcohol licence	81%
Licensing – Late night refreshment licence	15%
Licensing – Fireworks licence	7%
Bill payment services	64%
Wheelchair access	60%
Parking	59%*
Cash back	58%
Free to use cash machines	46%
Community noticeboard	37%
Wide aisles to improve accessibility	36%
Parcel services – Parcel collection point	34%*
Parcel services – Click and collect service	32%*
Loyalty card	29%
Plants or horticulture products	24%*
Home news delivery	23%
Post office	23%
Charged cash machines	16%
Hearing aid loops	16%
Local grocery delivery	16%
Customer toilets	13%
Dry cleaning	7%
Car wash – Jet wash (manual)	5%
Car wash – Automatic machine car wash	5%
Car wash – Hand car wash (attended)	2%
Photo booth	3%
Prescription collections	2%
Key cutting services	1%

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ACS FARNBOROUGH
ACS.ORG.UK

FREEZER UNITS	78%
CUSTOMER OPERATED COFFEE MACHINE	30%
IN-STORE BAKERY	22%
HOT FOOD COUNTER OR CABINET	22%
FOOD PREPARATION AREA/KITCHEN	19%
SERVE OVER COFFEE MACHINE	12%
MICROWAVE FOR CUSTOMERS	11%
FOOD-TO-GO CONCESSION E.G. SUBWAY/COFFEE SHOP	10%
SEATING AREAS	9%

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

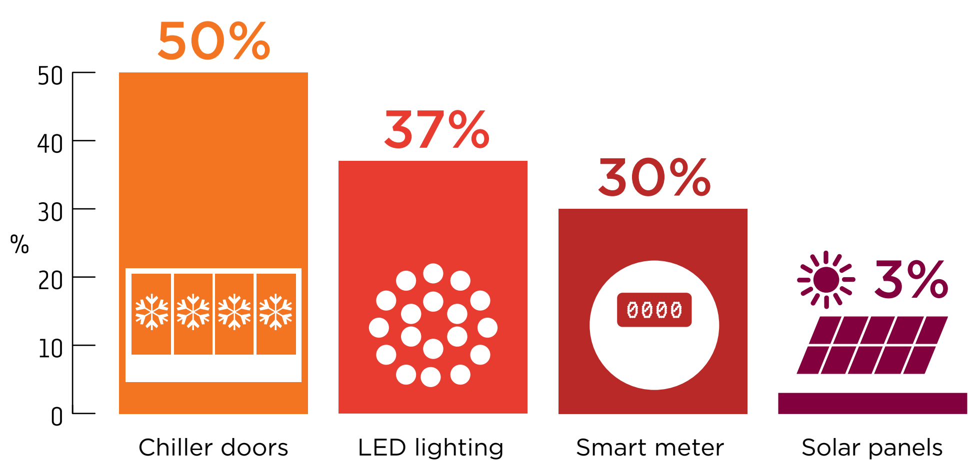
··· WE LOOK FORWARD TO YOUR NEXT VISIT ···

CCTV	87%
EPoS	69%
Facebook	33%
Store website	31%
Digital advertising screens	22%
Twitter	21%
In-store Wi-Fi	14%
Mobile marketing platform/ loyalty scheme	11%
Digital shelf edge labels	5%
Instagram**	5%
WhatsApp**	3%
Self-service checkouts	2%

PAYMENT METHODS

94%	Debit card
88%	Credit card
80%	Contactless payment
63%	Mobile payment

ENERGY SAVING



All data on this spread – source ACS/HIM 2017/2018 except * which are 2018 only. ** Independents only

CONVENIENCE STORES PROVIDE ALMOST

365,000

JOBS IN MAINLAND UK

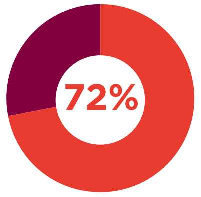
Source: ACS/HIM 2018

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**



OF COLLEAGUES ARE SATISFIED WITH THEIR JOB

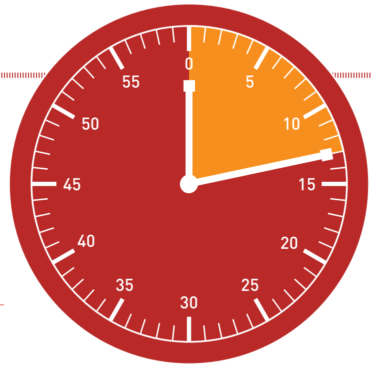
TRAVEL TO WORK

→ 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

PEOPLE

Male 32% | 68% Female

21% 16-24 years old

17% Over 60 years old

→ HOURS WORKED

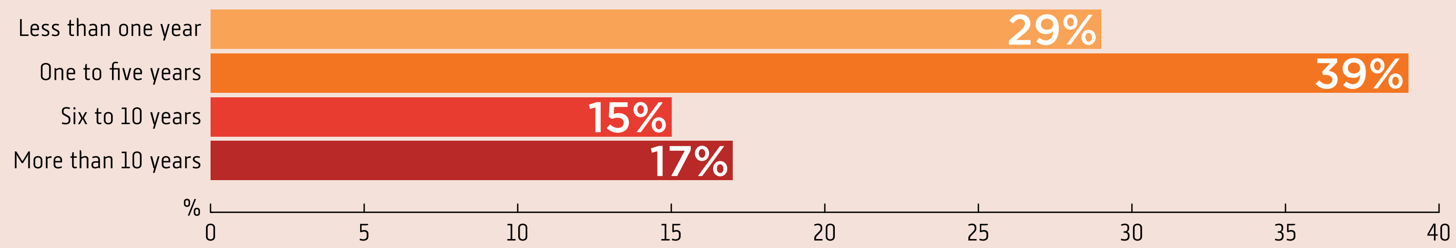
0-16 45%

17-30 30%

31-40 18%

40+ 6%

→ LENGTH OF EMPLOYMENT



63% of retailers employ at least one family member

37% of retailers employ no family members

24% of retailers employ family only

All data on this page – source: ACS Colleague Survey 2018, with the exception of total number of jobs – source: ACS/HIM 2018

All data on this page – source: ACS/HIM 2018, with the exception of family employment which is independents only

ENTREPRENEURS

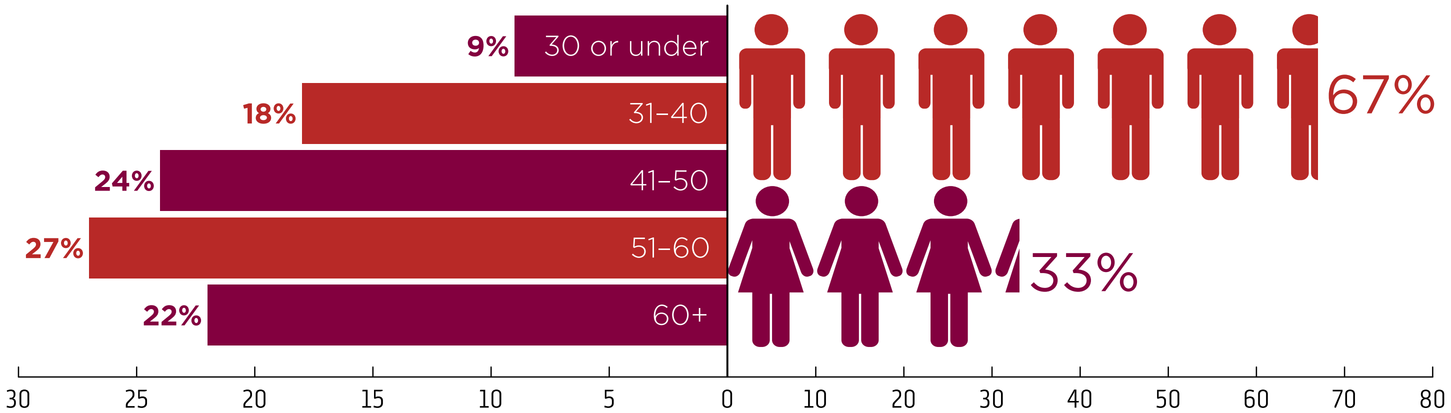
24% OF SHOP OWNERS **WORK MORE THAN 70** HOURS PER WEEK

19% take **no holiday** per year

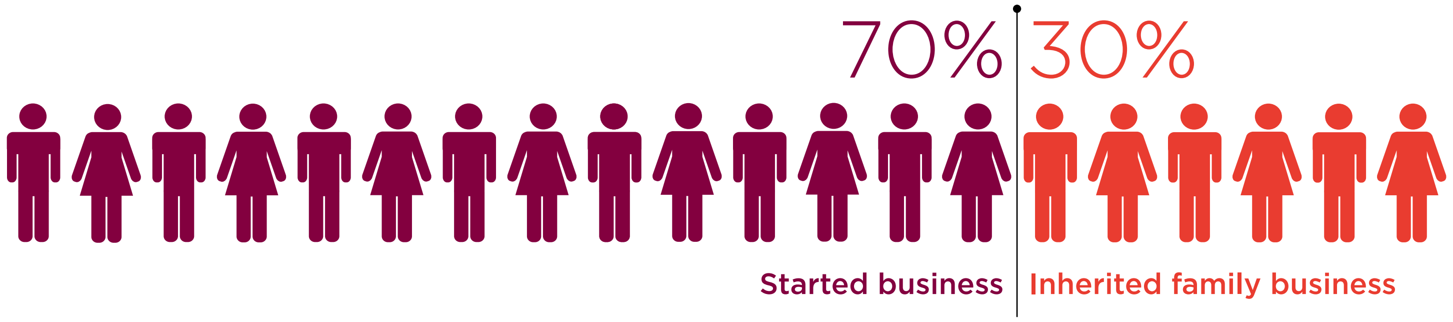
28% have been in the business **for more than 25 years**

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

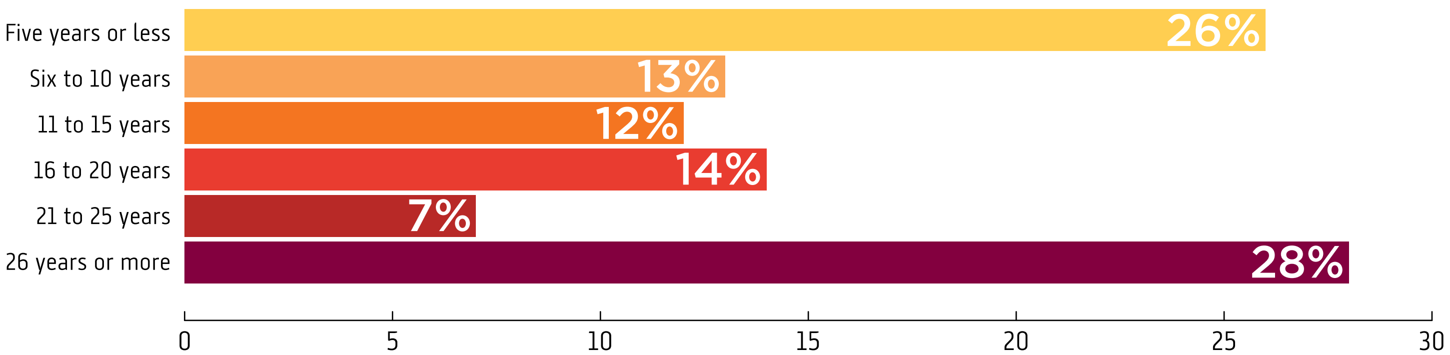
OWNERSHIP AGE AND GENDER



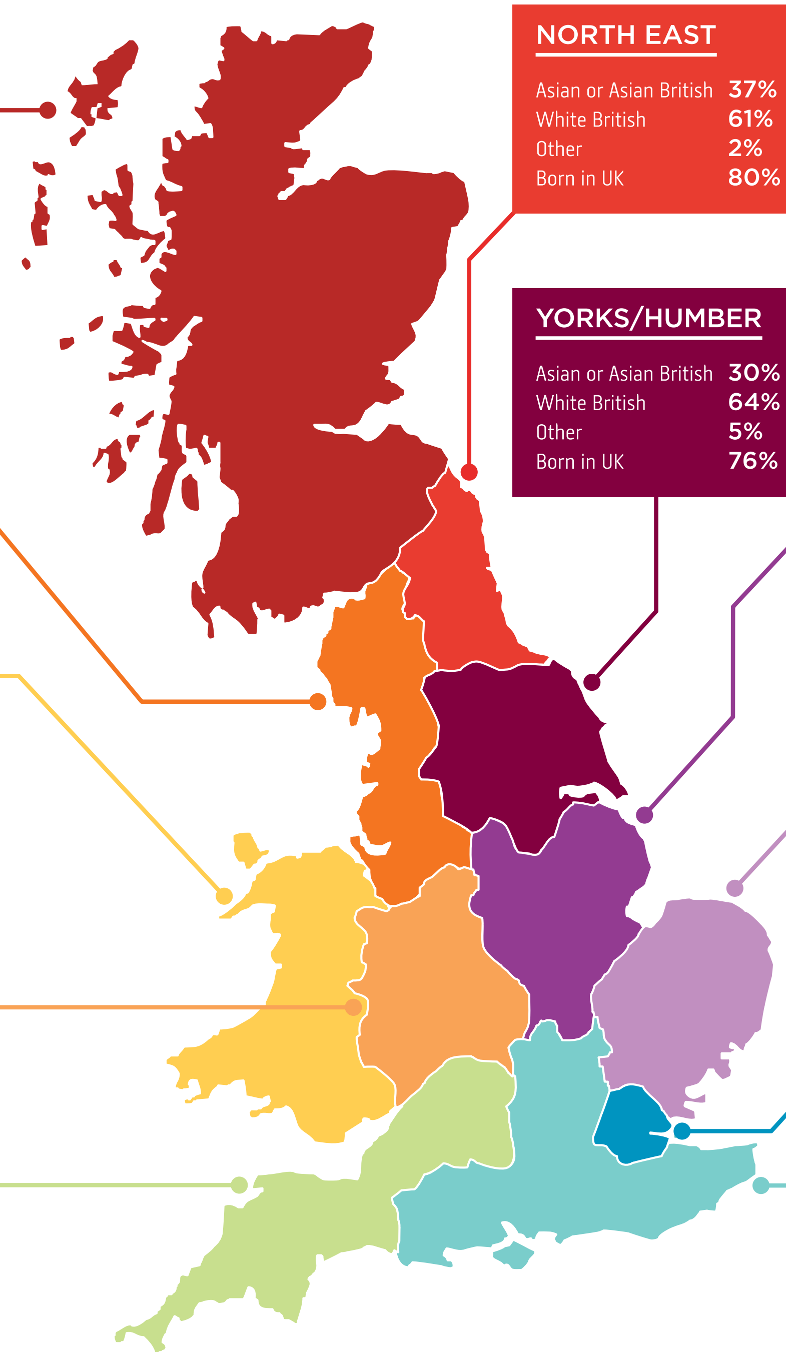
ENTRY TO THE SECTOR



TIME IN BUSINESS



ETHNICITY OF OWNERS



Region	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

27% of retailers in Wales speak Welsh

پنجابی
ਪੰਜਾਬੀ

18% of shop owners speak **Punjabi**

हिन्दी

10% of shop owners speak **Hindi**

ગુજરાતી

9% of shop owners speak **Gujarati**

اردو

5% of shop owners speak **Urdu**

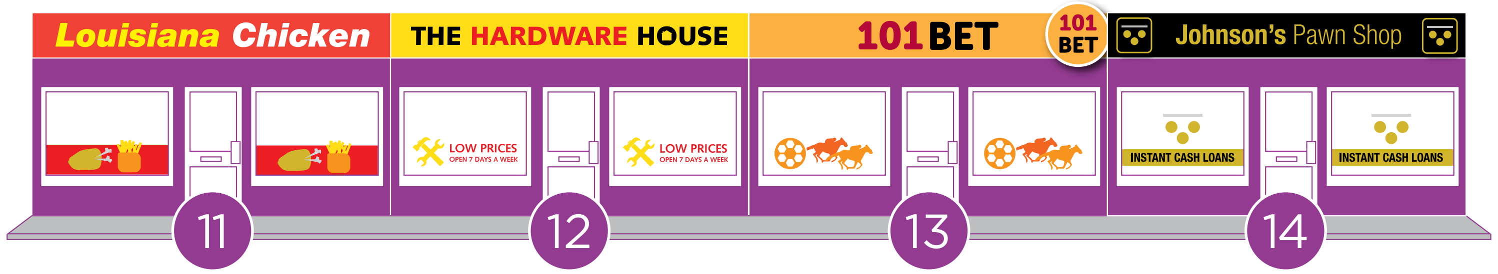
All data on this spread – source ACS/HIM 2018 (independents only)

MOST POSITIVE IMPACT ON THE LOCAL AREA

1 Post offices
2 Convenience stores
3 Pharmacies

4 Specialist food shops
5 Coffee shops/cafés
6 Pubs/bars
7 Banks

8 Restaurants
9 Charity shops
10 Petrol stations



11 Fast food/takeaways
12 Non-food
13 Betting shops
14 Pawnbrokers

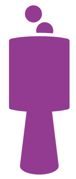
TOP THREE MOST WANTED SERVICES

1 Specialist food shops
2 Banks
3 Post offices

COMMUNITY ACTIVITY

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

Collecting money for a national or local charity

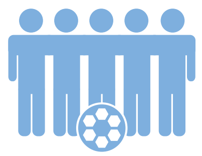


76%

Providing funding, or in kind support, to a community event

13%

Providing sponsorship to a local sports team or other community activity



11%

Donating to a food bank

6%

Taking part in community, council or local business association meeting or project

4%

Source: ACS Voice of Local Shops 2017/2018, with the exception of donating to a food bank - Source: ACS/HIM 2018 (independents only)

ENVIRONMENTAL ACTIVITY

46%

of independent retailers have introduced a voluntary charge for plastic bags

Source: ACS Voice of Local Shops August 2018

59%

of those who charge donate the proceeds to local causes

Source: ACS Voice of Local Shops November 2017

11%

of retailers provide recycling bins for customers

Source: ACS/HIM 2017/2018

COMMUNITY OWNED SHOPS

There are **378** community owned shops trading in the UK

Providing essential services to over **1,400** remote, rural communities

1,114 paid jobs created

9,605 volunteer positions created

Community shops generated a combined turnover of over **£54m**

and donated **£125,000** to community projects

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

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

Source: The Plunkett Foundation 2017/2018

THE AVERAGE SPEND IS **£6.50**

43% WORK FULL TIME

THE AVERAGE SHOPPER VISITS THEIR LOCAL STORE **3.4** times per week

20% are buying on SPECIAL OFFER

76% of customers pay by cash*

* Source: HIM CTP 2017

MODE OF TRAVEL TO STORES

Walk/on foot	54%
Drive	39%
Public transport	4%
Other	2%

DISTANCE TRAVELLED

Less than 100 yards	18%
Less than 1/4 mile	52%
Less than 1 mile	80%
More than 1 mile	20%

0 – 100 yards – 1/4 mile – 1 mile

VISIT FREQUENCY

Every day	19%
Most days (5-6 times a week)	14%
Every other day (3-4 times a week)	22%
About once a week (1-2 times a week)	26%
Less than once a week	19%

CUSTOMER PROFILES

	16-24 GENERATION Z	25-34 MILLENNIALS	35-54 GENERATION X	55-74 BABY BOOMERS	75+ SILENT GENERATION
→ AGE BREAKDOWN	13%	17%	33%	29%	8%
→ AVERAGE VISITS	3.3 times per week	3.2 times per week	3.3 times per week	3.5 times per week	3.9 times per week
→ AVERAGE SPEND (£6.50 shopper average)	£5.15	£6.33	£7.39	£6.56	£5.42
→ TOP DRIVERS TO STORE 1	66% It's close to where I live	62% It's close to where I live	64% It's close to where I live	70% It's close to where I live	82% It's close to where I live
2	16% It's close to where I work	18% It's close to where I work	17% It's close to where I work	9% Friendly and helpful staff	13% Friendly and helpful staff
3	7% Long opening hours	11% Friendly and helpful staff	10% Friendly and helpful staff	9% I like to support my local store	9% I like to support my local store
→ TOP MISSIONS	FOOD-TO-GO 32%	FOOD-TO-GO 21%	TOP-UP (PLANNED) 22%	NEWSAGENT 32%	NEWSAGENT 42%

» METHODOLOGY

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. 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. 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.

Store numbers are for mainland Great Britain and do not include Northern Ireland.

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 UK 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. 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 the 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 (August 2017 to May 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 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 the UK 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 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 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 unaffiliated 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. 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 (August 2017 to May 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., 1,000-1,999 sq. ft. and 2,000-3,000 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 (August 2017 to May 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): 3.87.
  - Independently owned symbol stores (excluding forecourts): 7.54.
  - Independently owned forecourts: 6.52.
  - Multiples (Inc. co-operatives, forecourt multiples, multiply owned symbol stores): 16.18.
  - Sector average: 7.89.

- 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". Data was weighted to be nationally representative 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". Data was weighted to be national representative and answers were ranked to reflect opinion.
- Community activity – Data was obtained from averaging the results from the most recent four ACS VOLS surveys (August 2017 to May 2018) and reflects independent retailers only (including those who own symbols stores and forecourts).
- Environmental activity
  - Data for retailers who have introduced a voluntary charge for plastic bags obtained from ACS Voice of Local Shops survey August 2018 and refers to retailers located in England only.
  - Percentage of retailers who donate their carrier bag charge obtained from ACS Voice of Local Shops survey November 2017. This data excludes retailers who stated they did not charge for carrier bags.
  - Recycling bins data obtained from ACS independent and multiple retailers 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.
- Community Shops – Number of community owned shops obtained from the Plunkett Foundation 2018 database. All other data was obtained from the Plunkett 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 produces several reports throughout the year, looking in detail at different aspects of the convenience store sector, all of which are available free to members. We can also provide further breakdowns of the Local Shop Report data to members. Please contact Katie Cross at katie.cross@acs.org.uk for further details.

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:

experian. him IGD Plunkett Foundation Populus RetailEconomics William Reed INFORMING BUSINESS GROWTH

CONTACT

For more details on this report, contact
Katie Cross via email at katie.cross@acs.org.uk

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

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