
# The **Local Shop** Report 2020

A report by the Association of Convenience Stores

#LocalShopReport

ACS the voice of local shops

## Contents



## Introduction

The Local Shop Report provides a comprehensive view of the UK convenience sector, looking at where stores trade, the colleagues we employ, our contribution to the economy and the essential role we play in local communities. The information in this report is gathered from our own primary research, surveying 2,431 independent retailers in addition to multiple and co-operative businesses representing over 6,700 stores. The report also draws on data supplied by William Reed, IGD, Plunkett Foundation, The Retail Data Partnership and Lumina Intelligence.

While this report is intended to look at the normal conditions of a store in 2020/21, some of the figures have been influenced by Covid-19. We address the response of convenience stores to lockdown on page 17 of this report. 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 and online at ACS.org.uk/research

## Who we are

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

**72%** are run by independent retailers

## What we offer


**76%** Bill payment services


**49%** Free to use cash machines

**17%** Local grocery delivery

## Why we are important

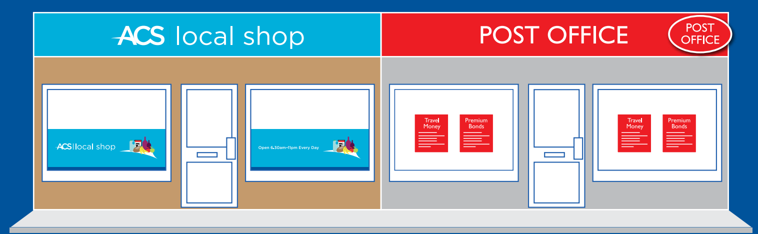
**£44.7bn** total sales

**£10.1bn** in GVA

**£585m** invested

**412,000** jobs

### Most positive impact on the local area




1. Convenience stores
2. Post offices

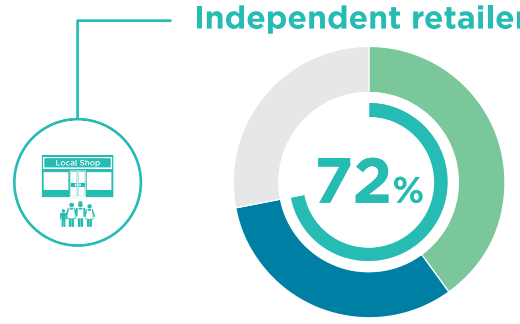




There are **46,955** convenience stores in mainland UK

## Shop ownership

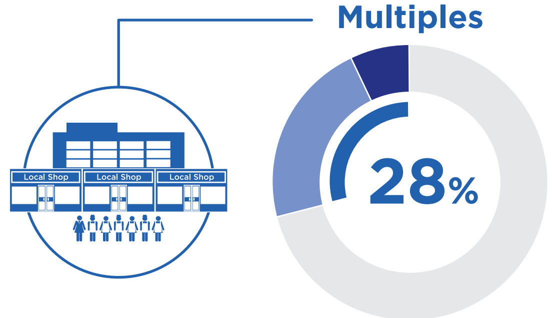
### Independent retailers




**40% Unaffiliated independents** (including unaffiliated forecourts)

**32% Symbol group independents** (including franchises)

### Multiples




**7% Co-operatives**

**21% Other multiples** (including multiple owned forecourts and multiples trading under symbol groups)

Source: WRBM 2020

**Unaffiliated independents**
Independent retailers operating under their own fascia.

**Symbol groups**
Independent retailers who trade under a common fascia e.g. Nisa. Multiple businesses can also trade under a symbol group e.g. A.F. Blakemore (SPAR).

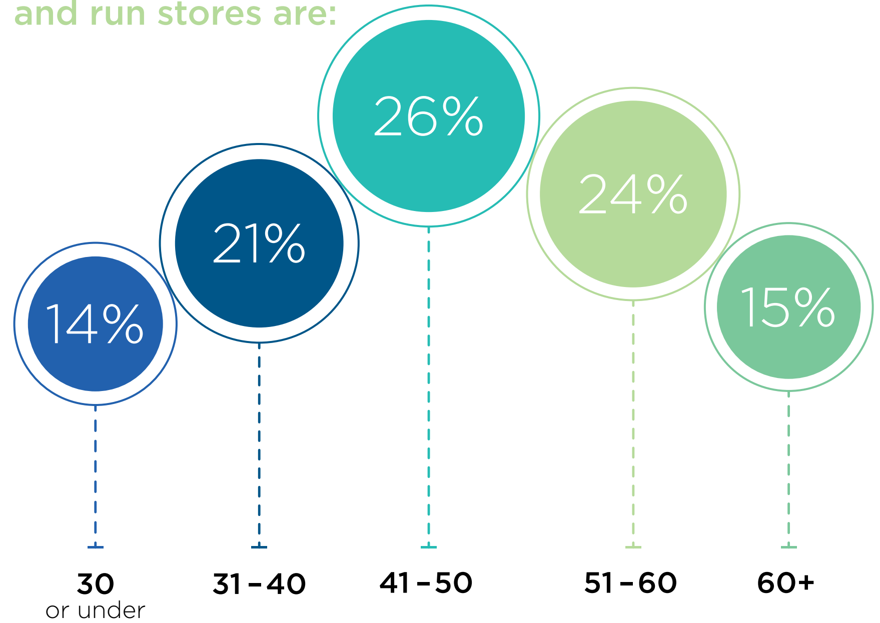
**Co-operatives**
Groups of stores that are owned by their members.

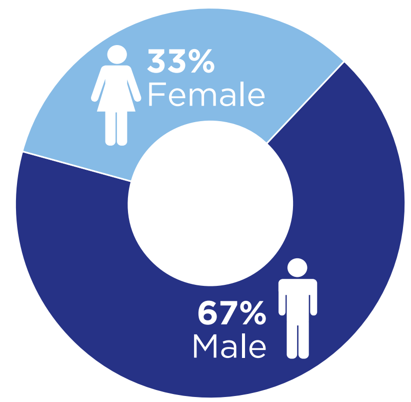
**Convenience multiples**
Retail businesses operating chains of 10 or more convenience stores under a centrally-owned fascia e.g. McColl's.

**Forecourts**
Convenience stores located on petrol filling stations. Forecourts are included within each of the retailer types and can be unaffiliated, symbol group, multiple or co-operative businesses. For more information about the forecourt sector please see the ACS Forecourt Report.

## Entrepreneurs

### The people who own and run stores are:




| | |
|---|---|
| White British | 48% |
| Asian or Asian British | 44% |
| Other | 8% |

Source: ACS/Lumina 2020

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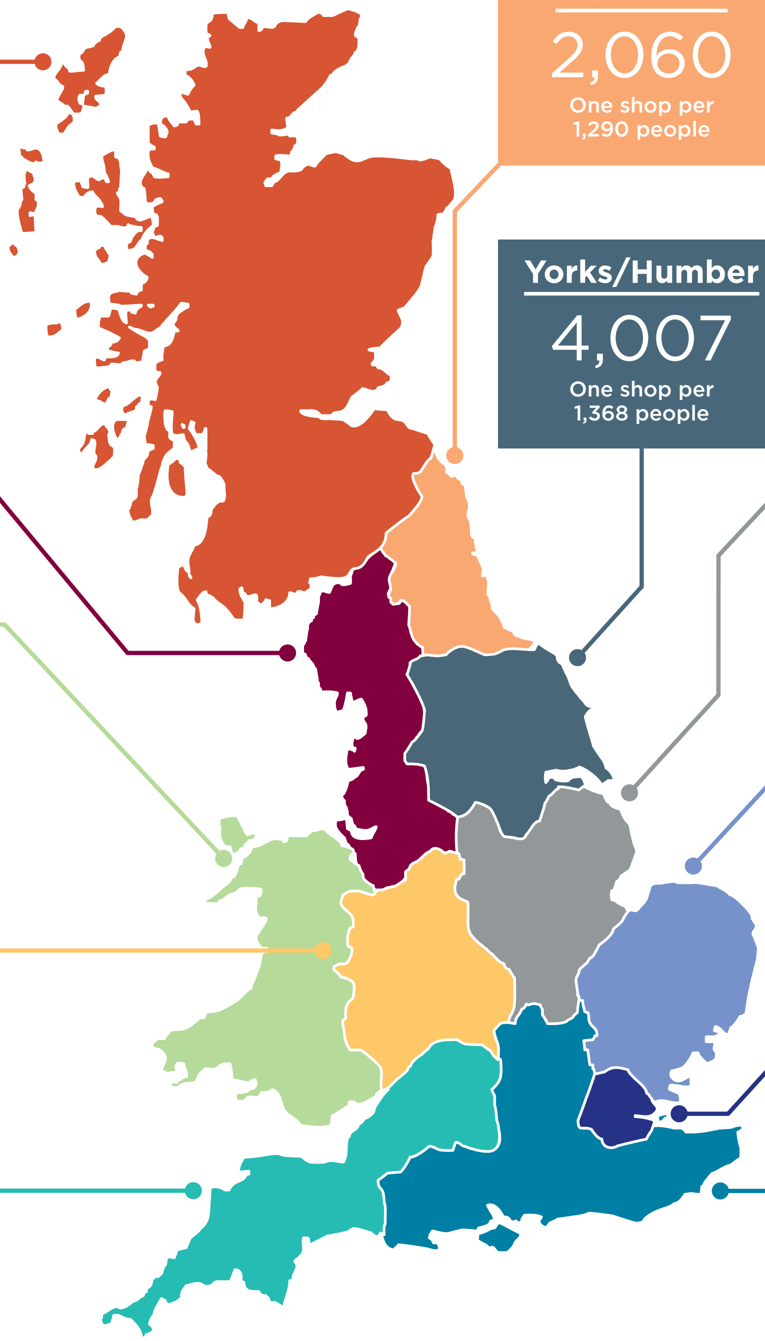
There are **46,955** convenience stores in mainland UK

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

## Shop numbers



**Scotland**
5,025
One shop per 1,082 people

**North East**
2,060
One shop per 1,290 people

**England total**
38,963
One shop per 1,437 people

**North West**
5,131
One shop per 1,421 people

**Yorks/Humber**
4,007
One shop per 1,368 people

**East Midlands**
3,551
One shop per 1,353 people

**Wales**
2,967
One shop per 1,058 people

**Eastern**
3,981
One shop per 1,558 people

**West Midlands**
4,487
One shop per 1,315 people

**London**
5,845
One shop per 1,524 people

**South West**
4,133
One shop per 1,355 people

**South East**
5,768
One shop per 1,583 people

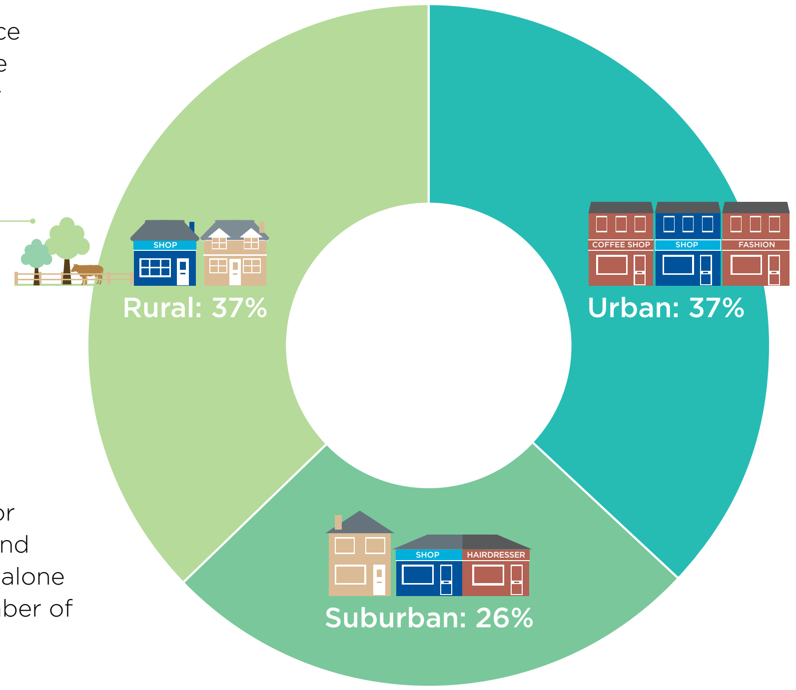


All data on this page – source: WRBM 2020 and ONS 2019

## Location

### 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.

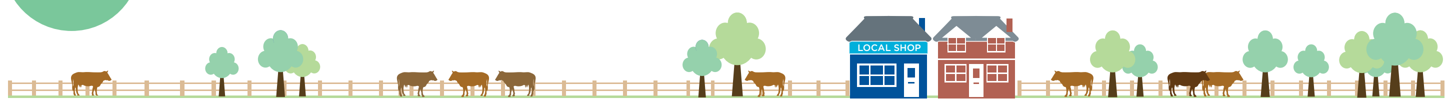



### Urban
Operating as part of a mix of stores serving the needs of those living in centres and the shopping needs of workers and residents.

Source: WRBM 2020

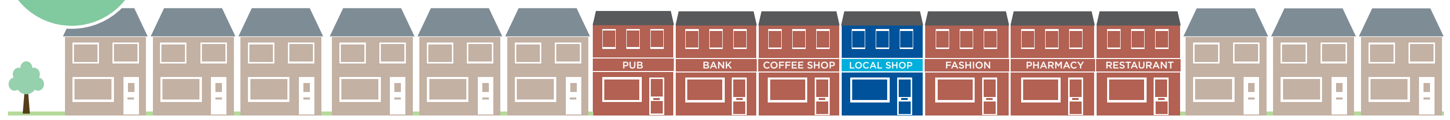
## Neighbouring businesses

**37%** **Isolated store**
**No other** retail/service businesses close by.

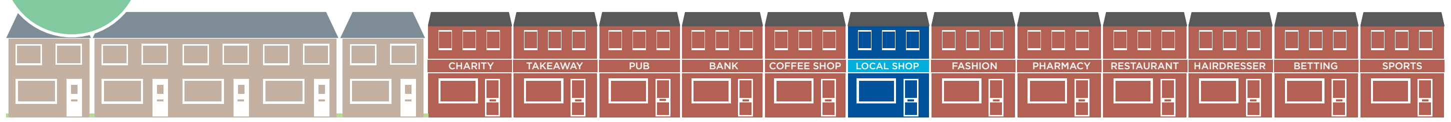


**39%** **Located on a small parade**
**Up to five** retail/service businesses close by.


**9%** **Located on a larger parade or a high street**
**Up to 10** retail/service businesses close by.




**15%** **Located on a main high street or within a city centre**
**More than 10** retail/service businesses close by.




Source: ACS/Lumina 2020 (independents only)

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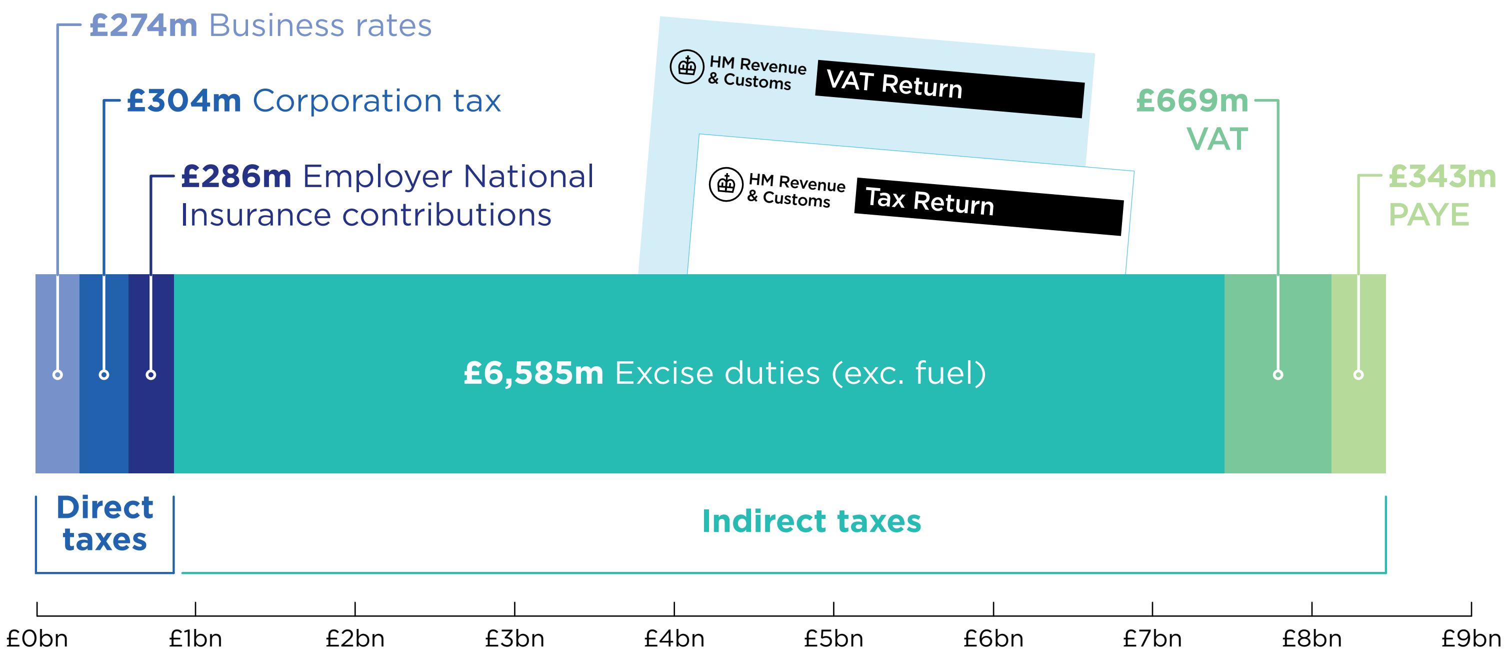
## Economic contribution

Over the last year, **the convenience sector contributed**

# Over **£10.1bn** in GVA and over **£8.9bn** in taxes




Source: ACS 2020/Retail Economics 2019

## Investment

Over the last year convenience stores have **invested** » **£585m** in their businesses

## Average annual investment by store type

Unaffiliated independents: **£8,022**

Symbols **£12,178**

Multiples: **£19,339**

## Proportion of stores investing

**27%** Unaffiliated independents

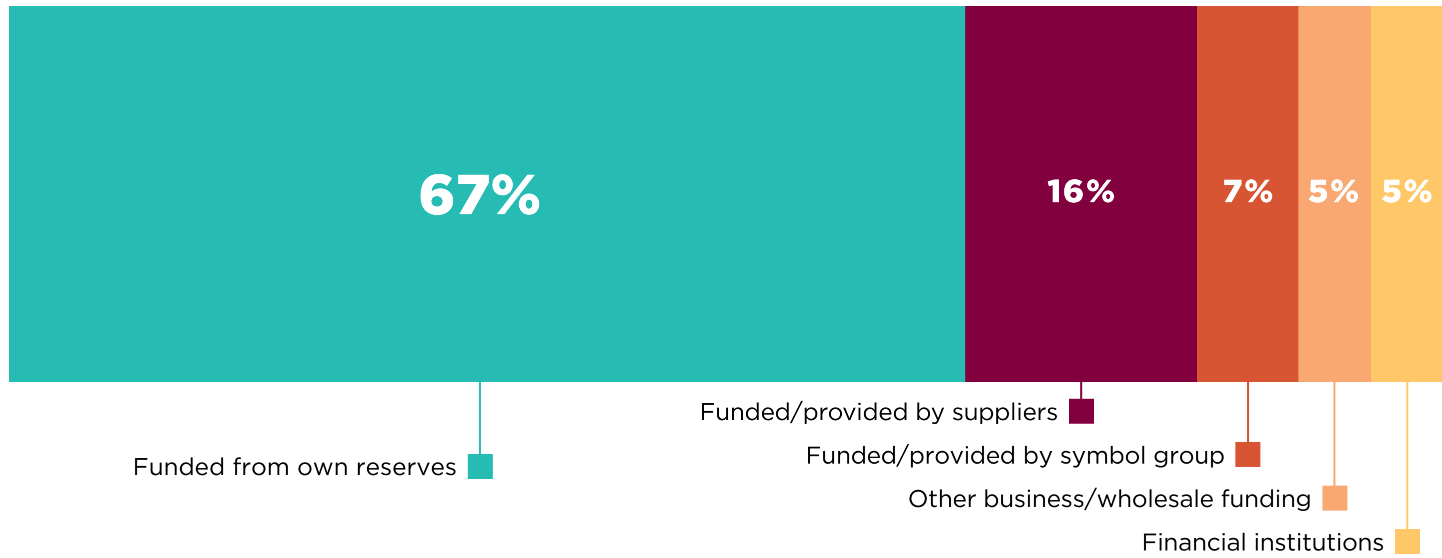
**30%** Symbols

**36%** Multiples

## Areas of investment (of those investing)

- Refrigeration **42%**
- Internal building maintenance **35%**
- In-store lighting **30%**
- Shelving **23%**
- Store signage **15%**
- Air conditioning **12%**
- Crime prevention measures **12%**
- Till systems (e.g. EPOS) **10%**
- Freezer space **8%**
- Full store refits **5%**
- Internal building development **5%**
- Parking provision **5%**
- Improving store access **4%**

## Sources of investment



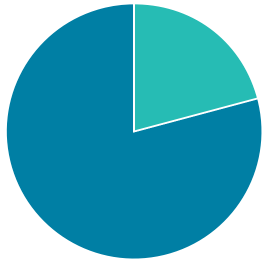

All data on this page – source: ACS Investment Tracker 2019/20
(Sources of investment refers to independents only)

Source: ACS Investment Tracker 2019/2020

# » WHAT WE SELL



Total value of sales

**£44.7bn =**  over one fifth of the total grocery market

(in the convenience sector in the year to March 2020)

A store's product margin typically ranges from: **21% to 31%**

Source: ACS/Lumina 2020

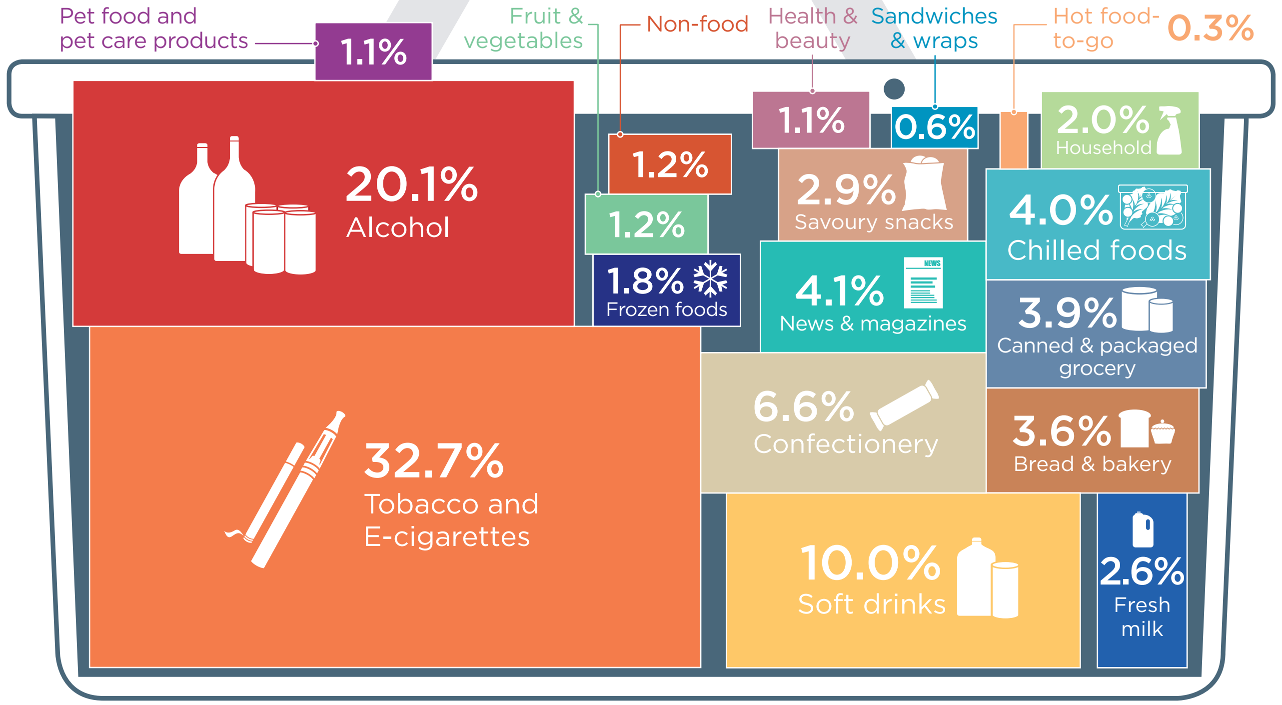
## Convenience market share

| Store type | Market share of sales |
|---|---|
| Symbols | 35.3% |
| Multiples | 23.8% |
| Unaffiliated Independents | 17.7% |
| Co-operatives | 12.4% |
| Forecourts* | 10.9% |

*Excludes forecourt stores operated as symbol, multiple grocer or co-operative fascias. Forecourt sales excludes fuel

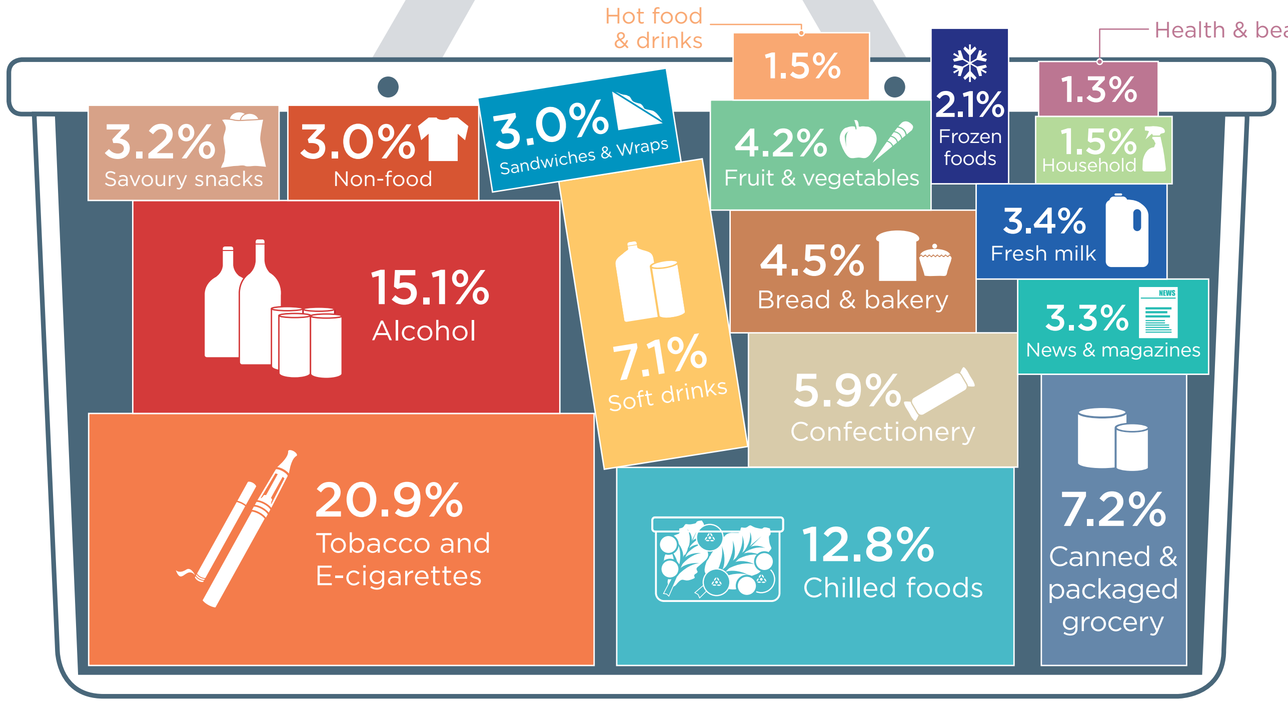
Source: IGD 2020

## Category sales: Independents only (2020)




Source: The Retail Data Partnership 2020 – data refers to independent retailers only

## Category sales: Overall market (2019)

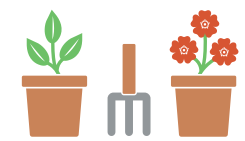



Source: IGD 2019 – data refers to overall convenience market

### The percentage of stores in the convenience sector that sell each of the following products is:

Alcohol licence 78%

Wood/domestic burning fuel 25%



Plants or horticulture products 33%

Source: ACS/Lumina 2020

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

| | | | | | |
|---|---|---|---|---|---|
| 84% Mobile phone top-up | 82% Lottery | 76% Bill payment services | 68% Cash back | 49% Free to use cash machines | 28% Parcel collection point |
| 27% Click and collect service (e.g Collect Plus) | 22% Charged cash machine | 22% Post office | 19% Home news delivery | 17% Local grocery delivery | 12%* Click and collect services for groceries |
| 8% Dry cleaning | 8% Recycling bins | Car wash: 5% Jet wash (manual); 3% Automatic machine car wash; 2% Hand car wash (attended) | 4% Photo booth | 3% Prescription collections | 2% Key cutting services |

Source: ACS/Lumina 2019/2020. *Source = ACS/Lumina 2020

## Food service

| | | | | | | |
|---|---|---|---|---|---|---|
| 37% Customer operated coffee machine | 28% In-store bakery | 22% Hot food counter or cabinet | 19% Food preparation area/kitchen | 14% Serve over coffee machine | 12% Food-to-go concession | 12% Microwave for customers |

Source: ACS/Lumina 2019/2020

## Most valuable services

Consumers think that the **most valuable services** offered in their **convenience store are:**

- Cash machine
- Post office
- Click and collect

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

| | |
|---|---|
| 74% | EPoS |
| 41% | Store website |
| 30% | Digital advertising screens |
| 27% | In-store Wi-Fi |
| 11% | Mobile marketing platform/ loyalty scheme |
| 9% | Digital shelf edge labels |
| 7% | Self-service checkouts |
| 4% | Power outlets/USB ports for charging customer devices |

91%* of stores have CCTV

## Social media

| Facebook | Twitter | Instagram | WhatsApp |
|---|---|---|---|
| 44% | 32% | 21% | 10% |

**More customers searched** for **local shops** on Google during the start of **lockdown** (March 23-29) than any other time in the last 12 months.

Source: Google Trends

## Top five rising searches related to convenience stores

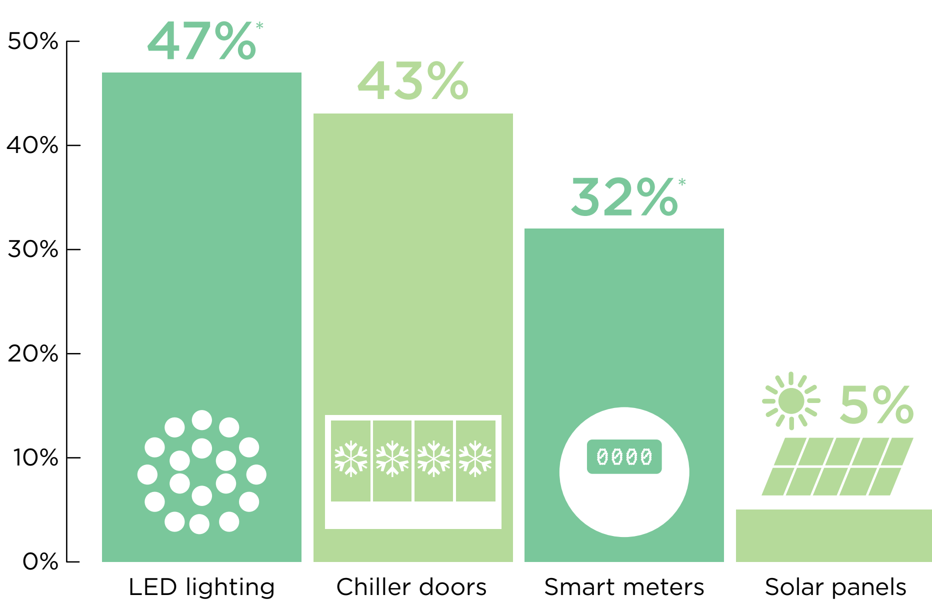
1. Shop near me
2. Local shop near me
3. Local farm shop
4. Local shop delivery
5. Local parcel shop

Source: Google Trends

## Payment methods

| | |
|---|---|
| 100% | Cash |
| 95% | Debit card |
| 92% | Credit card |
| 88%* | Contactless payment |
| 80%* | Mobile payment |

## Energy saving




All data on this page: Source: ACS/Lumina 2019/2020 unless stated otherwise.
*Source = ACS/Lumina 2019

## Convenience stores provide around 412,000 jobs in mainland UK

Source: ACS/Lumina 2020

## Colleagues in the convenience sector are:

66% (female) | 34% (male)

Source: ACS Colleague Survey 2020

23% 16-24 years old | 65% 25-60 years old | 12% Over 60

Source: ACS/Lumina 2020

## Hours worked

43% 0-16 hours | 34% 17-30 hours | 17% 31-40 hours | 6% 40+ hours

Source: ACS/Lumina 2020

33% of colleagues have childcare commitments

37% of colleagues care for other family members

Source: ACS Colleague Survey 2020

## Travel to work

### Average travel cost

£1.44 per day

### Average travel time

13 minutes

### Mode of travel to work

44% Walk/on foot

43% Drive

7% Public transport

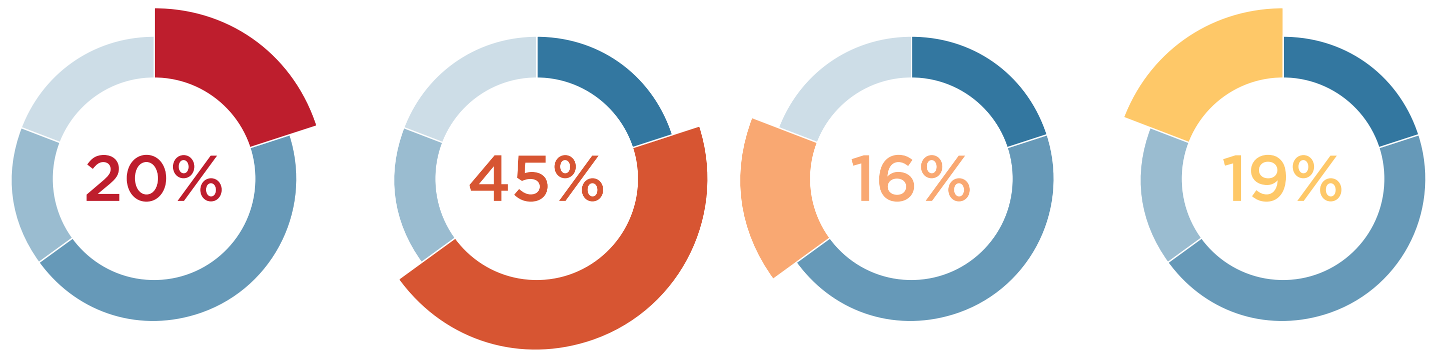
6% Other

71% are satisfied with their job

70% feel valued by their employer

Source: ACS Colleague Survey 2020

## Length of employment



20% Less than one year

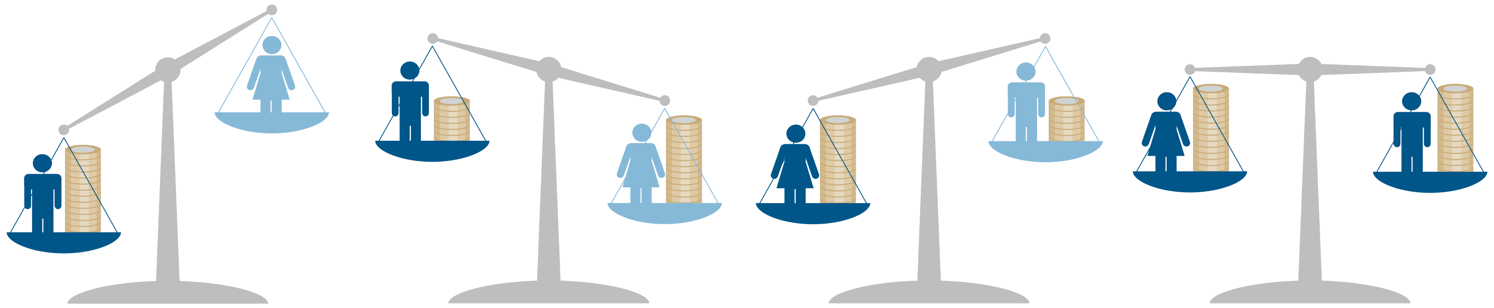
45% One to five years

16% Six to 10 years

19% More than 10 years

Source: ACS/Lumina 2020

## Contribution to household income



32% I am the only income earner in my household

43% There is more than one earner, I do not earn the most

17% There is more than one earner, I earn the most

8% There is more than one income earner in my household and we earn roughly the same

Source: ACS Colleague Survey 2020

## Job security

Very secure 21% | Somewhat secure 45% | Neither secure nor insecure 18% | Somewhat insecure 10% | Very insecure 5%

93% of colleagues have a permanent employment contract

Source: ACS Colleague Survey 2020

## Future plans

| | | |
|---|---|---|
| 1 | The same/similar role with my current employer | 39% |
| 2 | A more senior role with my current employer | 18% |
| 3 | A job outside of the sector | 13% |
| 4 | A similar/more senior role with a different employer in the same industry | 11% |
| 5 | Other | 11% |
| 6 | Not working/retired | 8% |

Source: ACS Colleague Survey 2020

# 92% of independents operate one store

Typical convenience stores **are open**

7am until 10pm

## Sales space

| | 1-999 sq. ft. | 1,000-1,999 sq. ft. | 2,000-3,000 sq. ft. |
|---|---|---|---|
| Multiples | 19% | 32% | 49% |
| Independents | 59% | 34% | 7% |

## Opening hours

### Opening

| | |
|---|---|
| 5am and earlier | 4% |
| 6am | 27% |
| 7am | 42% |
| 8am | 14% |
| 9am and later | 13% |

### Closing

| | |
|---|---|
| 5pm and earlier | 12% |
| 6pm | 7% |
| 7pm | 8% |
| 8pm | 13% |
| 9pm | 13% |
| 10pm | 25% |
| 11pm and later | 23% |

**4%** are open **24 hours**

**6%** Closed on Sunday

### Average opening hours

**14.8** Monday to Saturday

**13.5** Sunday





All data on this page: Source: ACS/Lumina 2020

# 22% of shop owners work more than 60 hours per week

**24%** take **no holiday** per year

Source: ACS/Lumina 2020 (independents only)

## How independent retailers source their products

**36%** I get all of my products delivered

**27%** I get some products delivered and some from a cash and carry

**37%** I get all of my products from a cash and carry

| 5% | 5% | 16% |
|---|---|---|
| Majority from a cash and carry | Majority of products delivered | Roughly the same amount |

Source: ACS/Lumina 2020 (independents only)

## Premises ownership

| | | |
|---|---|---|
| Multiples | 31% Own | 69% Rent |
| Independents | 58% Own | 42% Rent |

Source: ACS/Lumina 2019

## Business origin

**28%** inherited family business

**72%** started business

## Employment of family members

**54%** of retailers employ at least one family member

**46%** of retailers employ no family members

**13%** of retailers employ family only

41% of businesses are owned by **family partnerships**

## Time in business

| Time in business | |
|---|---|
| Five years or less | 28% |
| Six to 10 | 18% |
| 11 to 15 | 13% |
| 16 to 20 | 14% |
| 21 to 25 | 6% |
| 26 years or more | 21% |

## Accessibility in stores

The percentage of convenience stores that have:

- 61% Wheelchair access
- 46% Parking
- 44% Wide aisles
- 24% Hearing aid loops



All data on this page – source: ACS/Lumina 2020 (independents only) apart from family partnerships data (2019) and accessibility (independents and multiples)



## Business impact

| | Increased to a large extent | Increased to a small extent | Stayed the same | Decreased to a small extent | Decreased to a large extent |
|---|---|---|---|---|---|
| Sales (value) | 38% | 28% | | 8% | 26% |
| Footfall | 14% | 23% | 6% | 17% | 40% |
| Average basket spend | 48% | 29% | 1% | 6% | 17% |
| Opening hours | 2% | 1% | 17% | 58% | 21% |

## Services and home delivery

Local shops are now providing over **600,000 home deliveries a week** in their communities

56% **of stores offer 'card not present' transactions**, helping volunteers to shop for vulnerable people locally

## In-store measures

| | |
|---|---|
| Implementing a 2m distance between customers e.g. signage at the queuing area | 92% |
| Limiting the number of customers allowed in-store at any one time | 90% |
| Increasing hygiene measures e.g. staff washing their hands more often | 87% |
| Encouraging customers to pay with contactless payment | 69% |
| Placing plastic screens/Perspex at the till to protect colleagues | 60% |
| Introducing a delivery service | 57% |
| Other | 13% |

Source: ACS Covid-19 Impact Report April-May 2020

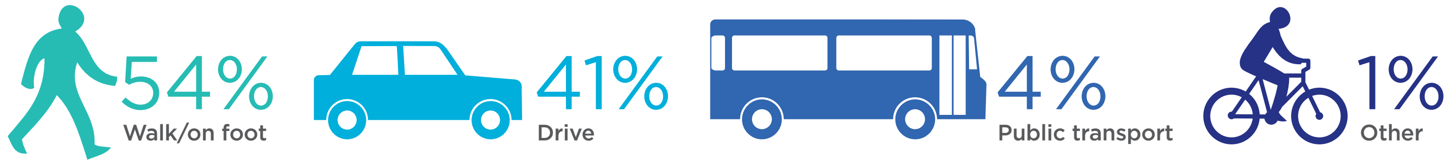
## Convenience customers are:

51% (female) | 49% (male)

Average age is: **48**

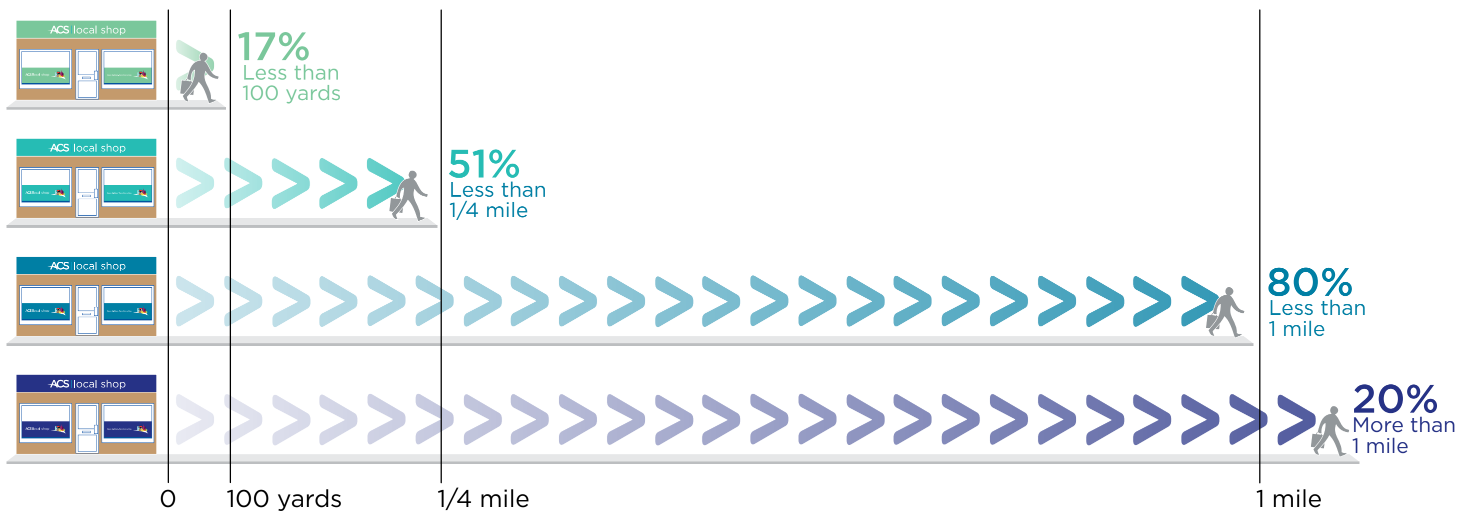
Source: Lumina CTP 2020

## How customers get to store



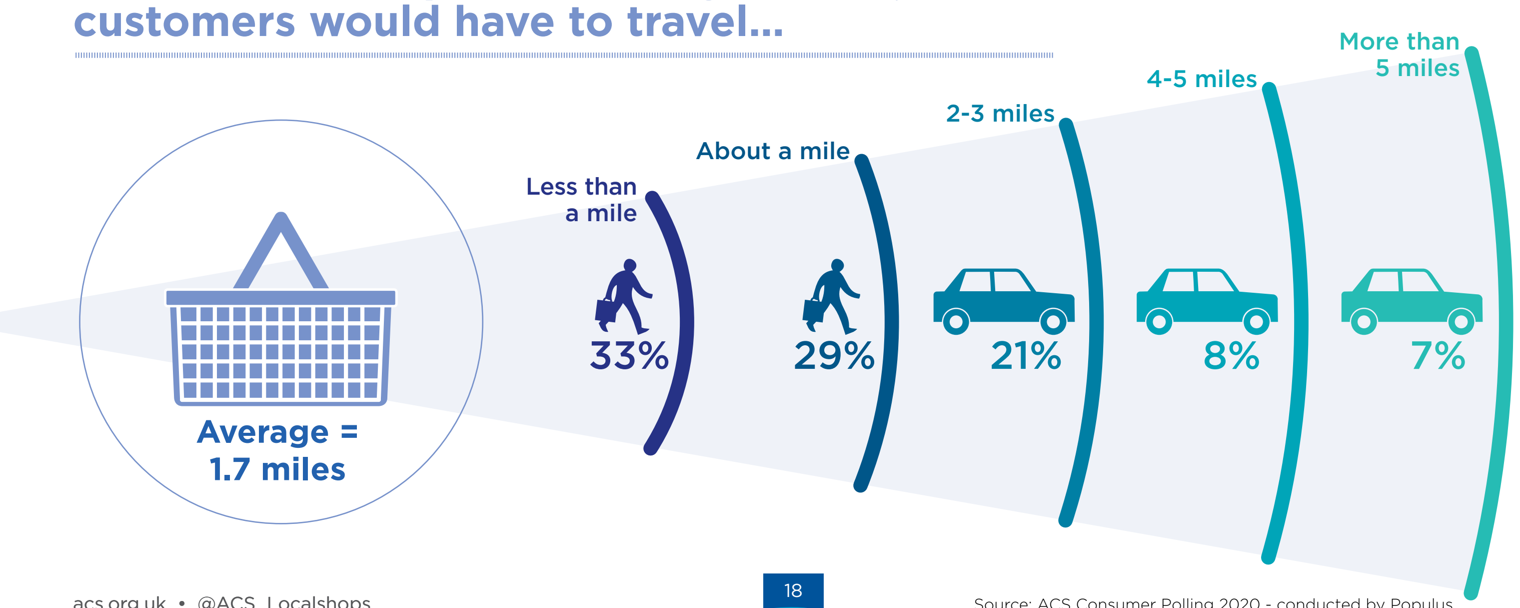

Source: Lumina CTP 2020

## Distance travelled to store




Source: Lumina CTP 2020

## If their local shop was no longer there, customers would have to travel...






Source: ACS Consumer Polling 2020 - conducted by Populus

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## How often customers visit

**Every day** — 22%

**Most days** (5-6 times a week) — 15%

**Every other day** (3-4 times a week) — 24%

**About once a week** (1-2 times a week) — 22%

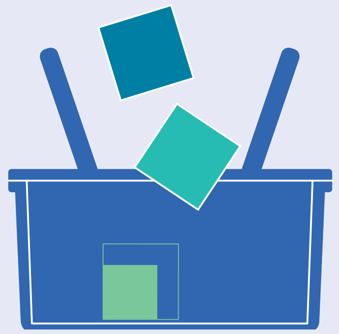
**Less than once a week** — 17%

The average customer visits their local store **3.7** times per week

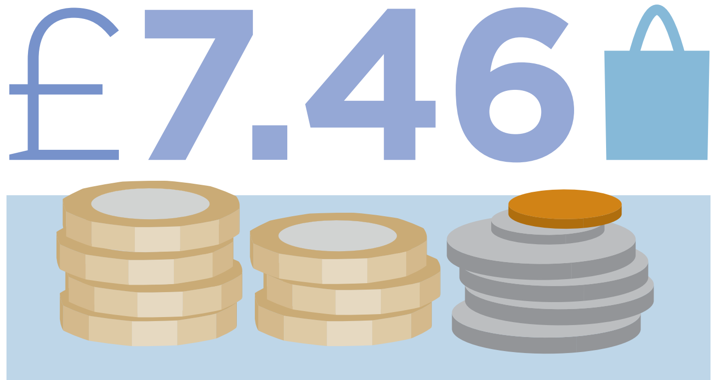
Source: Lumina CTP 2020

## Purchases

The average basket size is **2.5 items**



The average spend is **£7.46**



Source: Lumina CTP 2020

## Customers' relationship with convenience colleagues


10% of customers **know** the people running and working in their local shop **very well**

26% of customers **know** the people running and working in their local shop **quite well**

34% of customers **don't know** the people running and working in their local shop **well**, but will **occasionally have a conversation**

30% of customers **don't know** the people running and working in their local shop and **don't interact with them**

Source: ACS Consumer Polling 2020 - conducted by Populus

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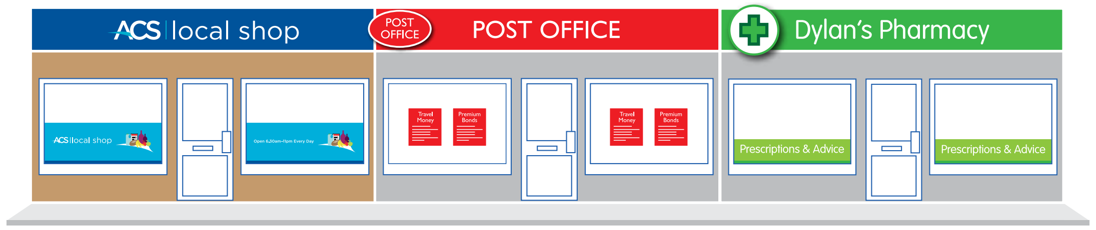
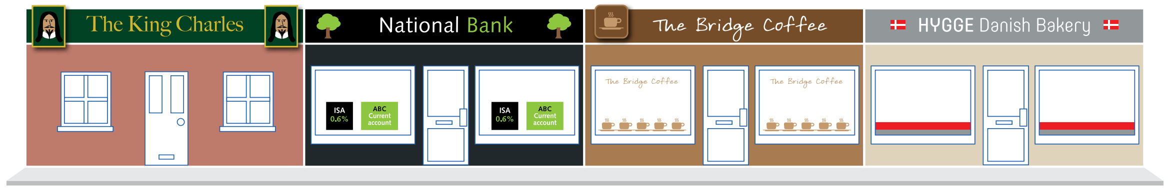
## Most positive impact on the local area

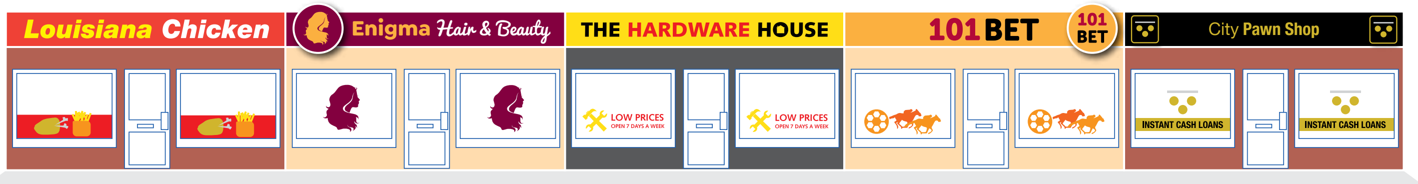



Convenience stores — 1
Post offices — 2
Pharmacies — 3



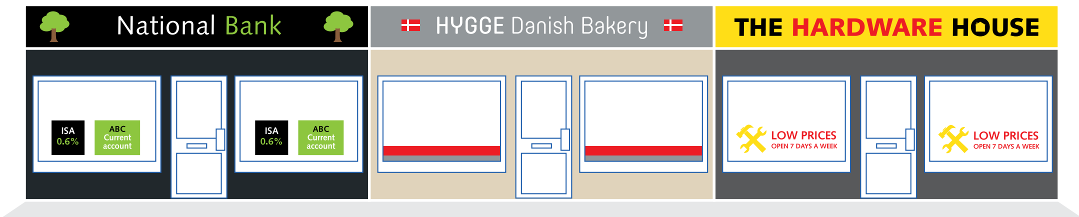

Pubs/bars — 4
Banks — 5
Coffee shops/cafés — 6
Specialist food shops — 7


Petrol stations — 8
Gyms/sports facilities — 9
Charity shops — 10
Restaurants — 11




Fast food/takeaways — 12
Hairdressers — 13
Non-food — 14
Betting shops — 15
Pawnbrokers — 16

## Top three most wanted services




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

## Community activity

**80%** **of independent** retailers engaged in some form of **community activity** in the past year

**71%** Collecting money for a national or local charity

**13%** Providing funding, or in kind support, to a community event

**11%** Providing sponsorship to a local sports team or other community activity

**4%** Taking part in community, council or local business association meeting or project

**6%** Litter picking or other local environmental campaigns

**20%** Donating to a food bank

Source: ACS VOLS 2019/2020

### In-store

**Indoor seating areas 9%**

**Outdoor seating areas 6%**

**Community noticeboards 47%**

**Customer toilets 12%**

Source: ACS/Lumina 2019/20

## Community owned shops

There are **372** community owned shops trading in the UK

Providing essential services to around **1,300** remote, rural communities

Over **700** paid jobs created

Around **7,000** volunteer positions created


Community shops generated a combined turnover of over **£55m**

There are over **1,000 young people** that **benefit** from **work experience** or **volunteering opportunities** in community owned shops

**94%** success rate of **community** owned shops

Source: Plunkett Foundation 2020

New primary data for the Local Shop Report was undertaken by ACS in the form of two surveys:

1. **Independent Retailer Survey** – A sample of 2,431 independently owned convenience store businesses in the UK. ACS commissioned Lumina Intelligence to aid in the design and delivery of the survey. The survey was carried out over the phone by BCC Marketing between 13th June and 29th July 2020. The telephone survey gathered responses from unaffiliated independent convenience stores, independent forecourt stores and independent stores that are part of a central buying or marketing group (known as 'symbol' groups). These are represented in the survey in the same proportion as they are represented in the market. The survey covers the nine regions of England, along with Wales and Scotland.

2. **Multiple Retailer Survey** – ACS conducted an online/paper survey of its multiple chain members. This survey was based on the questions asked in the Independent Retailer Survey, where relevant, to ensure consistency and accuracy of results. This survey returned results relating to a sample of 6,700 stores.

The results of these two surveys have been collated and figures for independents and multiples have been combined according to the proportion of stores in the market, in order to determine overall results for the sector.

**William Reed Business Media (WRBM)** – Store numbers and sector data
WRBM continually updates data through re-registering customers thereby adding changed recipients, closures and new stores. This is through postal, telephone research, online delivery and events, plus the ongoing work of the editorial teams on its brands Convenience Store, Forecourt Trader and The Grocer.

**Independent sales category data** – The Retail Data Partnership
The Retail Data Partnership (TRDP) supplies EPoS systems to independent retailers throughout the UK. Independent sales data is collected by receiving sales data back from around 3,000 sites each day that cover £1.8bn of sales each year.

**ACS Economic Report**
ACS commissioned Retail Economics to provide an economic overview of the convenience sector in 2018. ACS have updated the figures for 2020 based on revised data.

**Convenience Tracking Programme 2020** – Lumina Intelligence
This programme is a survey of over 20,000 convenience shoppers conducted at the 'moment of truth' in-store.

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

For more Community Barometer results please visit the ACS website or email phoebe.clifford@acs.org.uk

**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 which are represented in the survey in the same proportion as they are in the market. Lumina Intelligence aid in the design and delivery of the survey.

**ACS Investment Tracker** – Data obtained in the form of two surveys:
**ACS Voice of Local Shops survey** – Questions are asked relating to the amount retailers have invested over the past quarter, what they have invested in and how they have funded their investments.

**Multiples Investment Tracker survey** – A sample of over 3,000 multiple stores in the UK. Questions in the Multiple Investment Tracker survey are based on the questions asked in the Voice of Local Shops survey, where relevant, to ensure consistency of results.

The results of these two surveys are collated and combined according to the proportion of independent and multiple stores in the sector. The ACS Investment Tracker is completed every quarter and an average has been taken across the latest four quarters (August 2019 to May 2020).

**ACS Colleague Survey**
An online and paper survey with a sample of 2,078 staff working within the convenience sector. The fieldwork was conducted between 20th January to 24th February 2020. The data in this report excludes store managers and refers to a sample of 1,173 colleagues. Store managers have been excluded from the analysis to be consistent with previous reports. For more Colleague Survey results please visit the ACS website or email phoebe.clifford@acs.org.uk

**Community Shops** – Plunkett Foundation
The number of community owned shops is obtained from the Plunkett Foundation database.

All other data on community shops is obtained from the Plunkett Foundation report 'Community Shops 2020'. 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.

**ACS Consumer Polling 2020** – Conducted by Populus
Populus surveyed a nationally representative online sample of 2,078 UK adults aged 18+, between 28th and 30th June 2019. Respondents were surveyed using a questionnaire designed by ACS.

## References

**Who we are (page 3)**
- **Total number of convenience stores in mainland UK** – Figure sourced from WRBM.
- **Shop ownership** – ACS calculation based on figures sourced from WRBM.
- **Entrepreneurs** – Data obtained from the ACS Independent Retailer Survey and reflects independent retailers only (including those who own symbol stores and forecourts). '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.

**Where we trade (page 4-5)**
- **Store numbers** – Figures sourced from WRBM.
- Store numbers were divided by the mid-2019 ONS population estimates to obtain population per store.
- **Location** – 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).
- **Neighbouring businesses** – Data obtained from the ACS Independent Retailer Survey and reflects independent retailers only (including those who own symbol stores and forecourts).

**What we contribute to the economy (page 6-7)**
- **Economic contribution** – ACS calculation based on 2020 data, methodology originally sourced from ACS Economic Project conducted by Retail Economics in 2018.
- **Annual investment** – Average investment per store was obtained quarterly from the Voice of 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 an investment figure for each quarter. Quarterly results were added together to provide an annual amount invested.
- **Top areas of investment** – For unaffiliated independents and independent symbol groups the data was obtained from the Voice of Local Shops survey and for multiples, results were obtained from the Multiple Investment Tracker survey. Results for unaffiliated independents, symbol group independents and multiples were collated and combined according to their proportion of stores in the market. The results were calculated for the latest four quarters (August 2019 to May 2020) and an overall average was taken.
- **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 2019 to May 2020) and an overall average was taken.

**What we sell (page 8-9)**
- **Sales/market share** – Figures sourced from Lumina Intelligence.
- **Overall category sales** – Figures sourced from the IGD UK Convenience Market Report 2019.
- **Independent category sales** – figures sources from the Retail Data Partnership 2020. Data refers to independent sales data only, up to March 2020.
- **Product information** – Data obtained from independent and multiple retailer surveys. Results for independents 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 2019 and 2020 results, as two-year averages to account for any variations in sampling and methodology changes.

**The services and technology we offer (page 10-11)**
- Data obtained from independent and multiple retailer surveys. Results for independents 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 2019 and 2020 results, as two-year averages to account for any variations in sampling and methodology changes.
- **Google trends** – Data refers to the search 'local shops' in the UK. Trend data was sourced in August 2020.
- **Most valuable services** – data obtained from ACS Consumer Polling. Consumers were asked which services they had available to them in their local shop. Consumers were then asked, 'of the services that are available in your local shop/ convenience store, which is the most valuable to you?'

**Our colleagues (page 12-13)**
- **Jobs** – Per store employment figures obtained from ACS independent and multiple surveys. An average number of staff per store figure was calculated for both independent and multiple retailers. The average number of staff per store was then multiplied by the total number of stores in the sector (based on figures from WRBM). Results for independents 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): 4.95.
- Independently owned symbol stores (excluding forecourts): 7.85.
- Independently owned forecourts: 7.82.
- Multiples (Inc. co-operatives, forecourt multiples, multiply owned symbol stores): 17.07.
- Sector average: 9.68.

- Rest of data obtained from ACS Colleague Survey 2020.

**How we operate (page 14)**
- **Sales space** – Data obtained from independent and multiple surveys and refers to sales space.
- **Additional space** – Data obtained from independent and multiple surveys and refers to additional space In-store e.g. office space, food preparation areas, etc. Data excludes don't know responses.
- **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 independents and multiples were collated and combined according to their proportion of stores in the market, to determine overall results for the sector. Average number of hours open includes stores closed on Sunday or open 24 hours. Opening and closing times however exclude those closed on Sunday or open 24 hours.
- **Accessibility** – Data obtained from independent and multiple retailer surveys. Results for independents 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 2019 results, as two-year averages account for any variations in sampling and methodology changes.

**How we operate (page 15-16)**
- **Product sourcing/Family Members/Time in business** – Data obtained from the ACS Independent Retailer Survey and reflects independent retailers only (including those who own symbol stores and forecourts).
- **Premises ownership/Accessibility** – Data obtained from independent and multiple retailer surveys. For independents data reflects an average of 2019 and 2020 results, as two-year averages account for any variations in sampling and methodology changes.

**Covid-19 response (page 17)**
- **Covid Impact Survey** – Online survey conducted between 13th April and 1st May, distributed via email and ACS communications. Sample was self-selecting (not random). Number of participants was 87, representing 4,896 stores and 64,504 staff.

**Who we serve (page 18-19)**
- Majority of data in this section was obtained from Lumina Intelligence CTP 2020.
- Data relating to customers relationship with convenience colleagues and how far customers would have to travel if their shop was no longer there was obtained from ACS Consumer Polling 2020.

**Our communities (page 20-21)**
- **Most positive impact** – respondents were asked "which of the following types of services (if any) do you believe have the most positive impact on your local area? Select up to three. 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?" A wanted index was calculated for each service by taking the % who stated more away from those who stated less. Answers were ranked to reflect opinion.
- **Community activity** – data was obtained from averaging the results from the most recent four ACS VOLS surveys (August 2019 to May 2020) and reflects independent retailers only (including those who own symbols stores and forecourts).
- **Community shops** – number of community owned shops obtained from Plunkett Foundation 2020 database.
- **In-store** – % of retailers who offer each was obtained from independent and multiple retailer surveys. Results for independents 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 2019 and 2020 results, as two-year averages account for any variations in sampling and methodology changes.

Throughout the report, where percentages do not add up to 100%, this is due to rounding.

For more information about the Local Shop Report please visit the ACS website or email phoebe.clifford@acs.org.uk

## 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 Phoebe Clifford at phoebe.clifford@acs.org.uk for further details.

For more information about ACS, visit our website.

ACS.org.uk

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Google, IGD, Lumina Intelligence, Plunkett Foundation, Populus, Retail Economics, The Retail Data Partnership Ltd, William Reed Informing Business Growth

## CONTACTS

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the voice of local shops