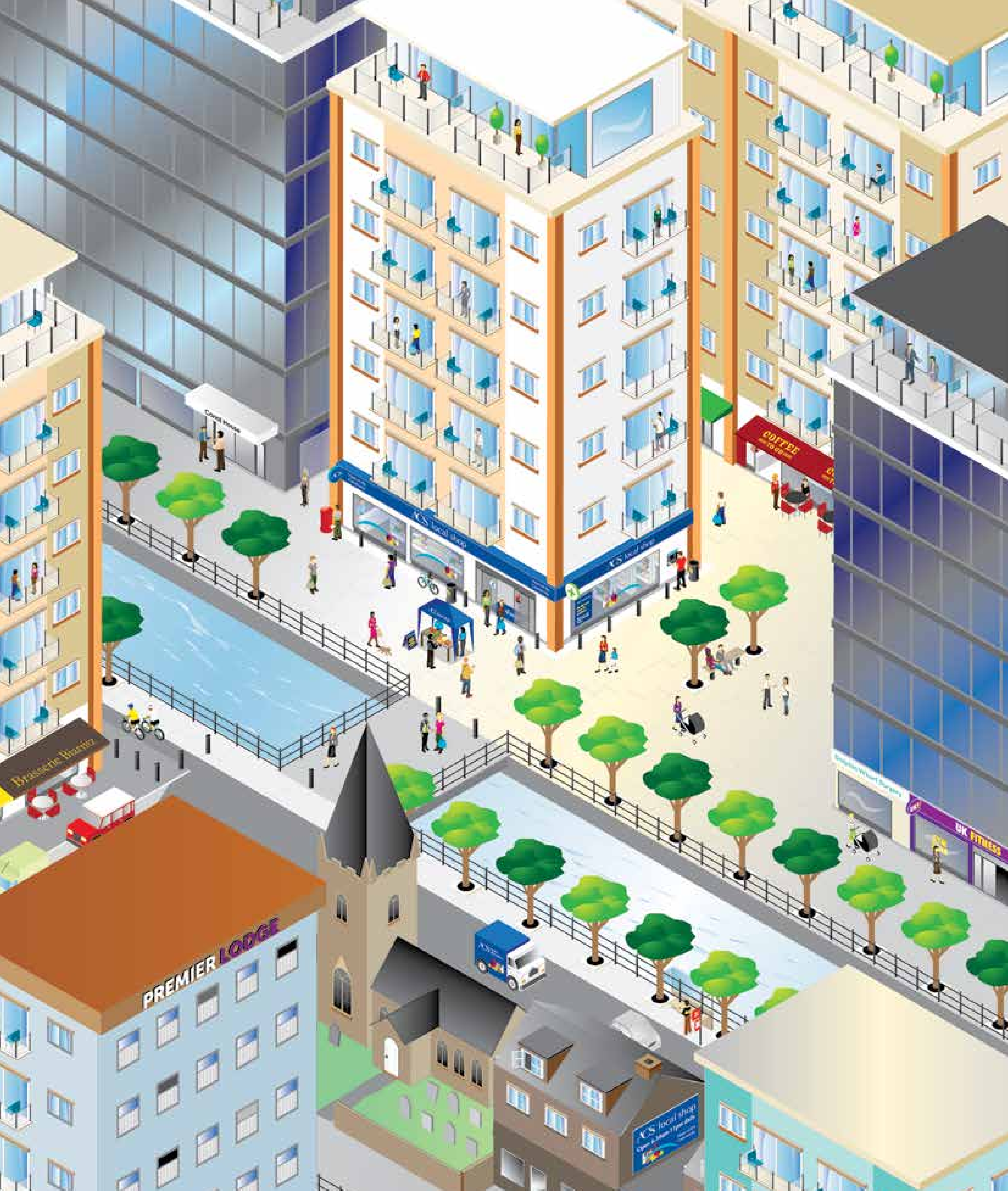


THE LOCAL SHOP REPORT 2015

A report by the Association of Convenience Stores

ACS the voice of local shops

#LocalShopReport

the voice of local shops

CONTENTS

ABOUT ACS

The Association of Convenience Stores is a trade association representing local shops across the UK. We represent our members through effective lobbying, industry leading advice and networking opportunities for retailers and suppliers.
Our membership includes a diverse range of convenience store retailers, from stand-alone family run independent stores to symbol groups and multiple convenience stores. These retailers operate in neighbourhoods, villages, on petrol forecourts and in city centres.

ACS' core purpose is to lobby Government on the issues that make a difference to local shops. We represent the interests of retailers on a range of issues, including business rates, energy, regulation, planning, alcohol and many more. All of our submissions to Government can be found in the Lobbying section of our website.

For more information about ACS, visit our website.

ACS.org.uk

ABOUT THE REPORT

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.

#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 premises - usually smaller than 280 square metres or 3,000 square feet (see page 7).
- Stocking a broad range of product categories (see page 9).

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

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

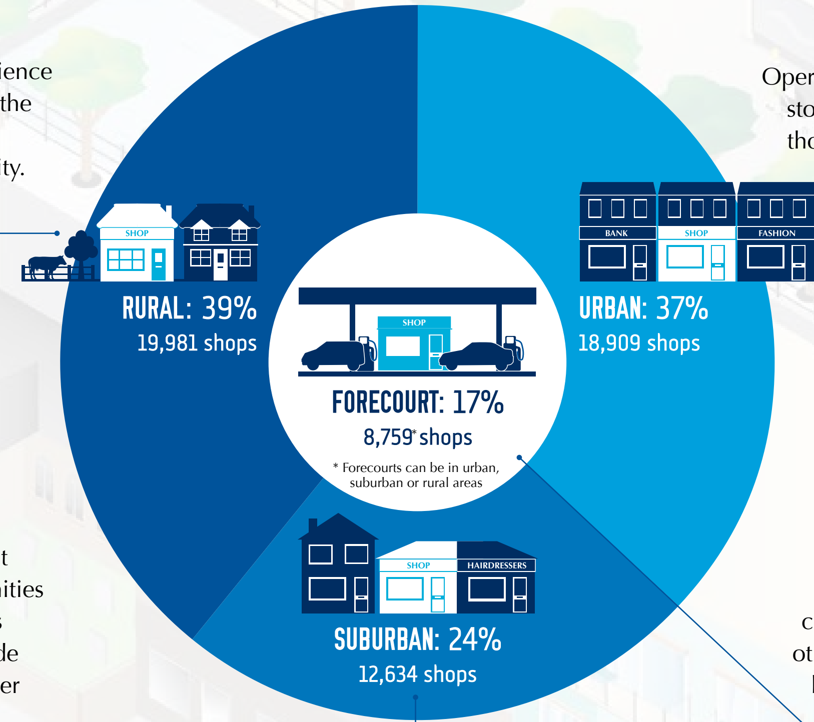
- Co-operatives – groups of stores that are owned by their customers, the biggest by far is The Co-operative Group, but there are a number of smaller co-operative societies operating convenience stores around the country;
- Multiples – chains of stores run from a head office (examples are McColl's Retail 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.

* Source: ACS Costs Barometer ** Source: ONS

Convenience stores trade in a wide variety of locations, meeting many needs:

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 shoppers.



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

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

Source: WRBM/Nielsen

ACS | the voice of local shops

SUMMARY

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

SHOPS

- There are **51,524** convenience stores in mainland UK.
- **42,755 in England**.
- **5,602 in Scotland**.
- **3,167 in Wales**.
- Scotland has more shops per head than any other part of the UK with **one shop for every 946 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.

SALES

- 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.

COMMUNITY

- 83% of independent retailers engaged in some form of **community activity** over the last year.
- The **South West** is the most engaged region, with **90% involved in community activity**.
- **Convenience stores and Post Offices** are the two services deemed to have the **most positive impact on high streets** by consumers and councillors.

FEATURES

Stores now feature a variety of services and offerings for consumers. Popular services **like mobile phone top up (80%) lottery (77%)** and an **alcohol licence (88%)** are staples of convenience. However, stores are also diversifying their service offering to include more technology and green features:

- 27% of stores **use smart meters**.
- 26% of stores **provide recycling services** for customers.
- 14% of stores **include digital advertising screens**.

CUSTOMERS

- 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 **56% female / 44% male**.
- 25% of customers **use their local shop every day**.

JOBS

Convenience stores provide over **407,000 jobs in mainland UK**.

- **338,348 in England**.
- **44,332 in Scotland**.
- **25,063 in Wales**.

Job profiles

- 63% of staff are **women**.
- 22% are aged **16 to 24**.
- 11% are **over 60** years old.

31% of employees **work 31 hours per week** or more. 83% of staff have **worked at their shop for at least one year** and 23% have worked there for **over ten years**.

Convenience stores offer their staff valuable training and development opportunities. **35% of convenience stores offer food safety training** while **independent stores** alone **make first aid training available to nearly 48,000 people**.

Family employment

Amongst independent businesses, 26% employ only themselves and members of their family, while 54% **employ at least one family member**.

ENTREPRENEURS

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 (15%) being **30 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, 27% of retailers speak Welsh**.

ACS | the voice of local shops

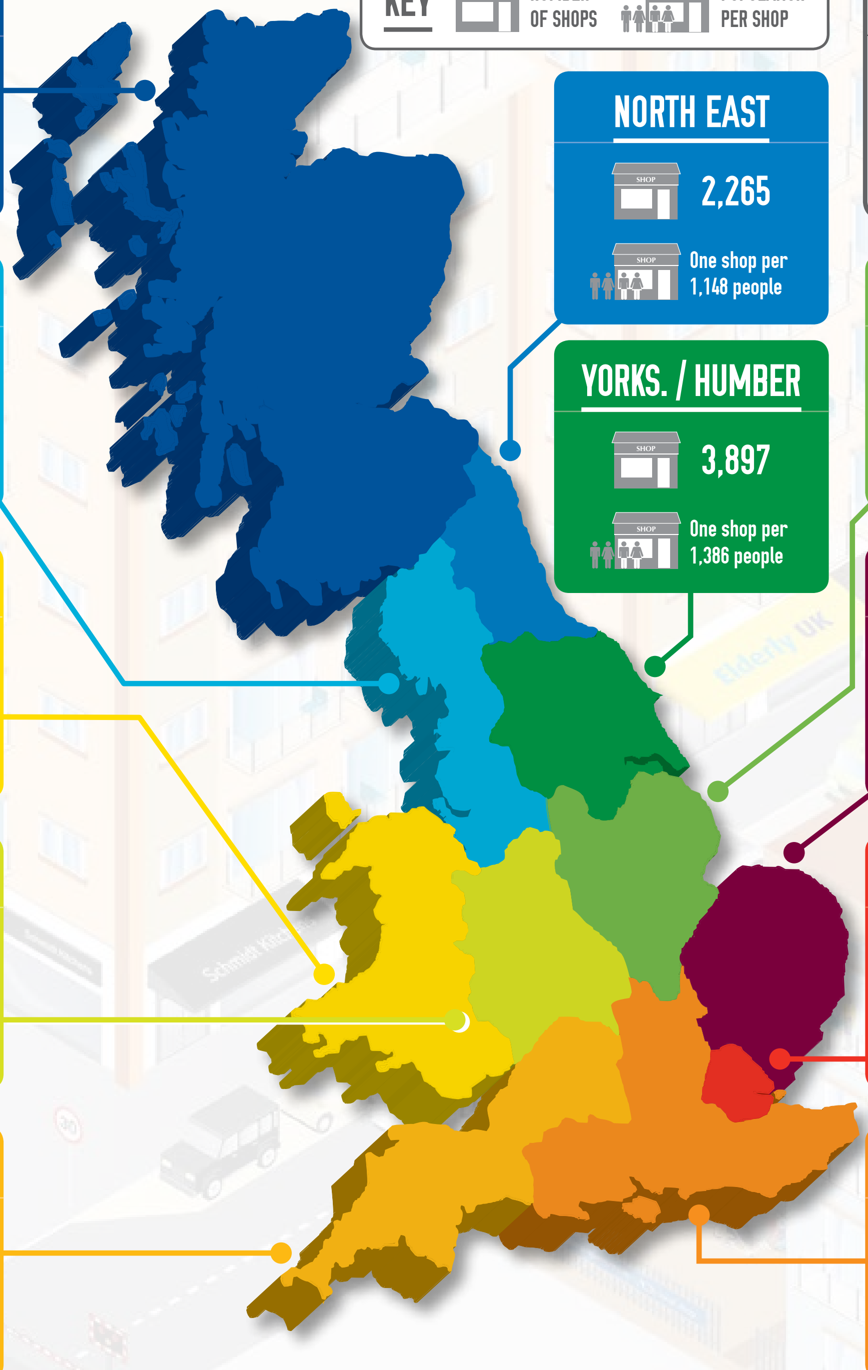
SHOPS

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

75% of convenience stores are run by **INDEPENDENT RETAILERS**

SHOP NUMBERS

KEY: NUMBER OF SHOPS | POPULATION PER SHOP



	Number of shops	Population per shop
SCOTLAND	5,602	One shop per 946 people
NORTH WEST	5,686	One shop per 1,249 people
WALES	3,167	One shop per 979 people
WEST MIDLANDS	4,824	One shop per 1,182 people
SOUTH WEST	4,876	One shop per 1,107 people
NORTH EAST	2,265	One shop per 1,148 people
YORKS. / HUMBER	3,897	One shop per 1,386 people
ENGLAND TOTAL	42,755	One shop per 1,270 people
EAST MIDLANDS	3,874	One shop per 1,187 people
EASTERN	4,363	One shop per 1,375 people
LONDON	6,551	One shop per 1,298 people
SOUTH EAST	6,419	One shop per 1,387 people

Source: WRBM/Nielsen 2015 and ONS 2014

SHOP SIZE

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.

Source: ACS Survey 2015

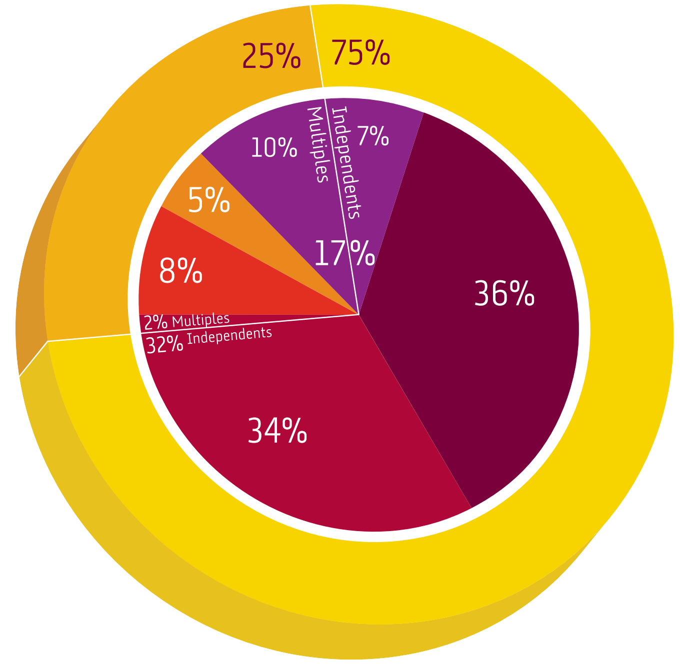
	0-999 sq ft	1,000-1,999 sq ft	2,000-3,000 sq ft
MULTIPLES	17%	46%	37%
INDEPENDENTS	61%	32%	7%

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.



Source: WRBM/Nielsen 2015

PREMISES OWNERSHIP

Source: ACS/him! 2015 (independent retailers only)

ACS | the voice of local shops

SALES

Total value of sales **£37.7 billion**
in the convenience sector in the year to April 2015

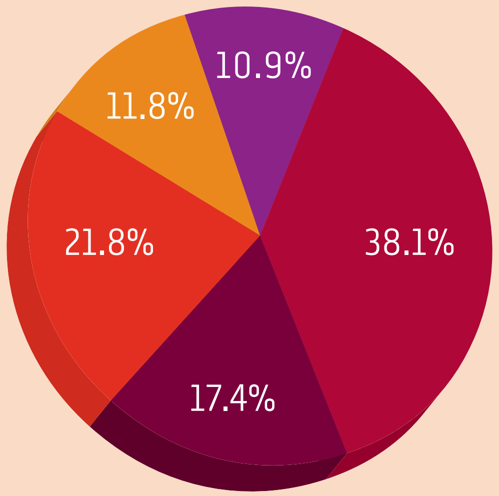
This amounts to over ONE FIFTH of the total grocery market

Turnover grew by... OVER 5%
between 2014 and 2015

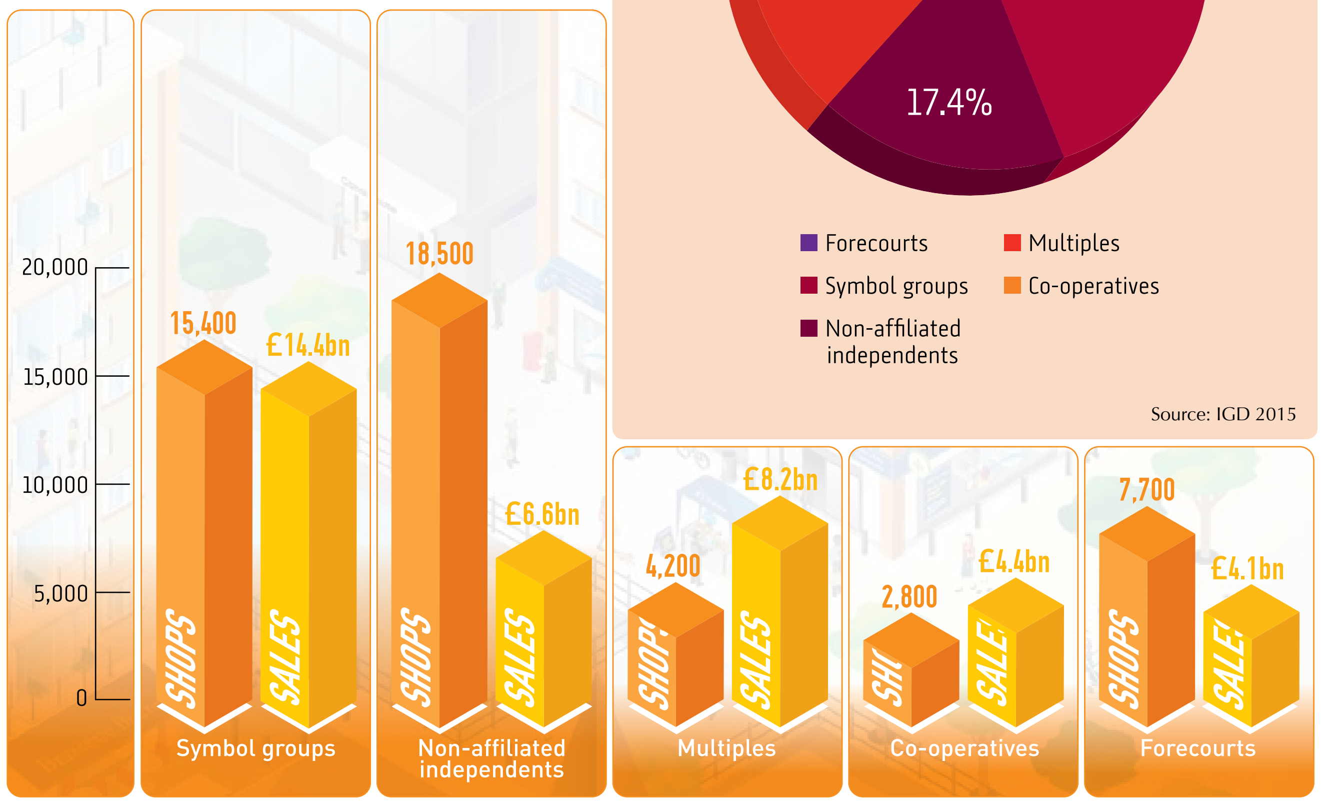
SHOP OWNERSHIP AND SALES

Independent retailers (non-affiliated and symbol) continue to make the biggest contribution to the overall sales of the sector, in addition to having the highest number of stores by a significant margin. However, there is continued strong growth in multiple retailing which now accounts for over a fifth of the market share of the sector.

MARKET SHARE OF SALES



Source: IGD 2015



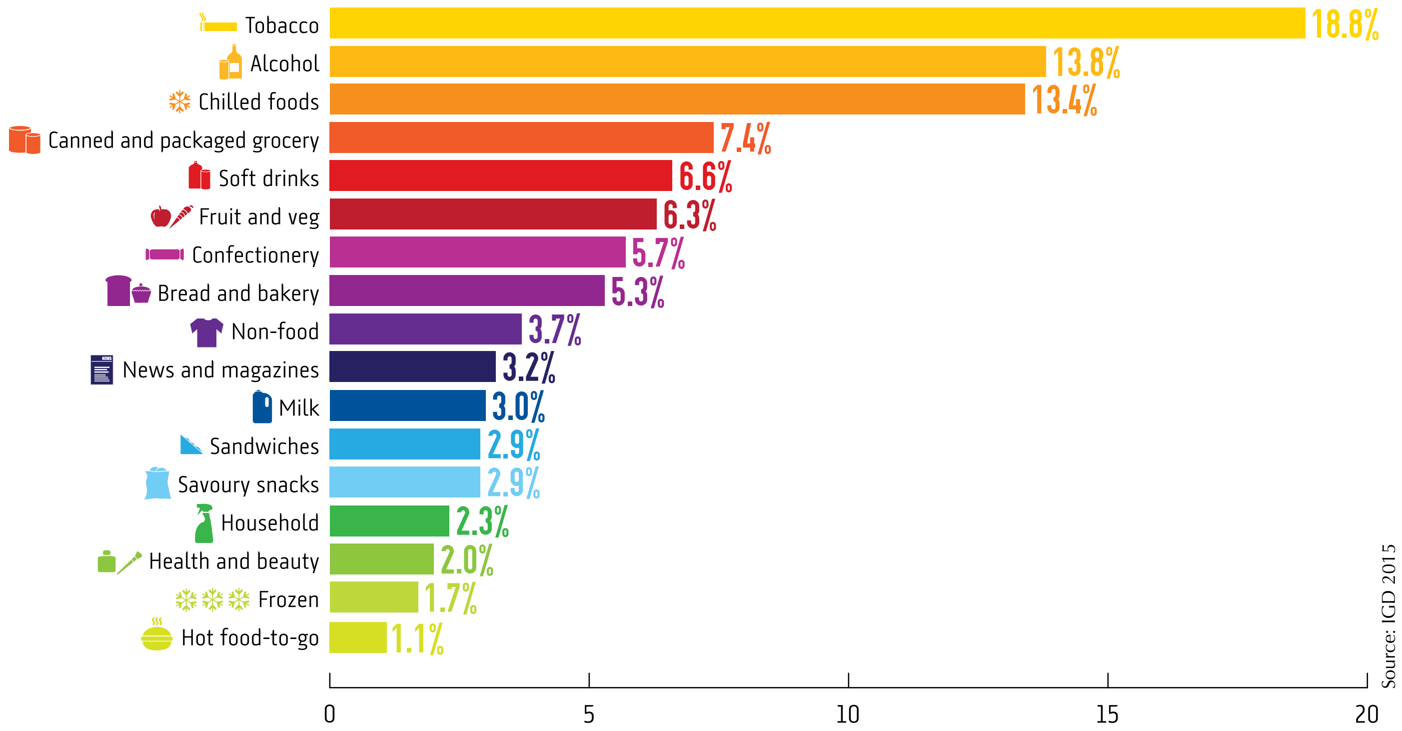
Key: Stores 2015 (1,000s) Sales 2015 (£bn)

Source: IGD 2015

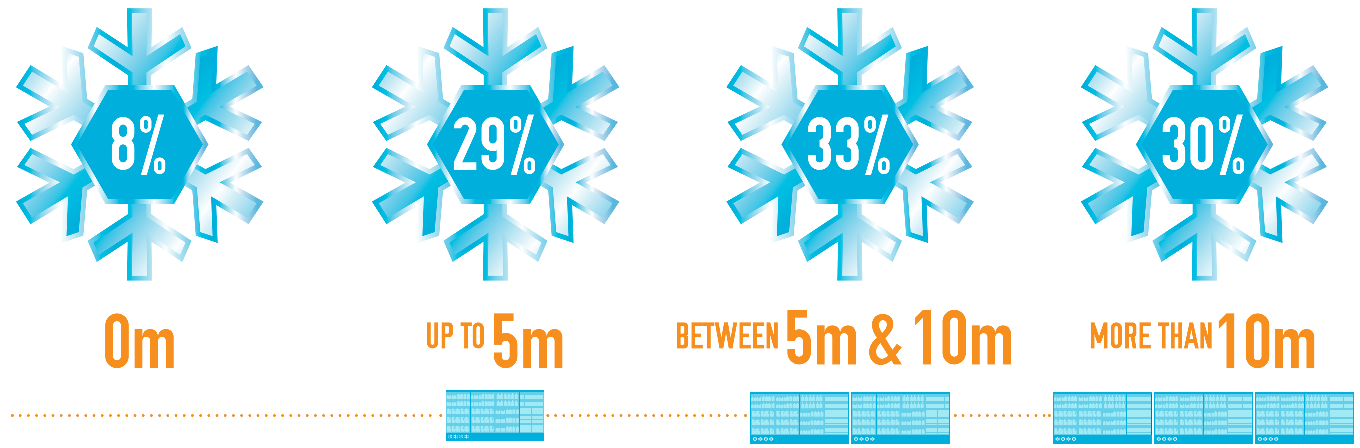
SHOP CATEGORIES

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.

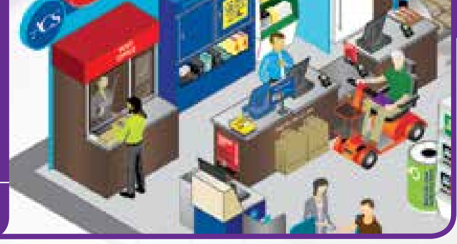
There have been significant changes in the prevalence of these categories in-store over the last year – for more information on comparisons go to pages 20-21.



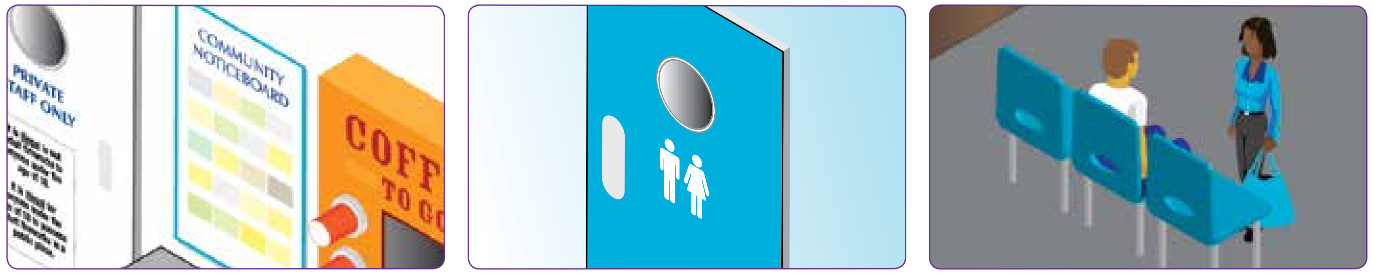
REFRIGERATION



Source: ACS/him! 2015



IN-STORE



Community noticeboard	32%
Customer toilets	7%
Seating area	5%

BEHIND THE COUNTER

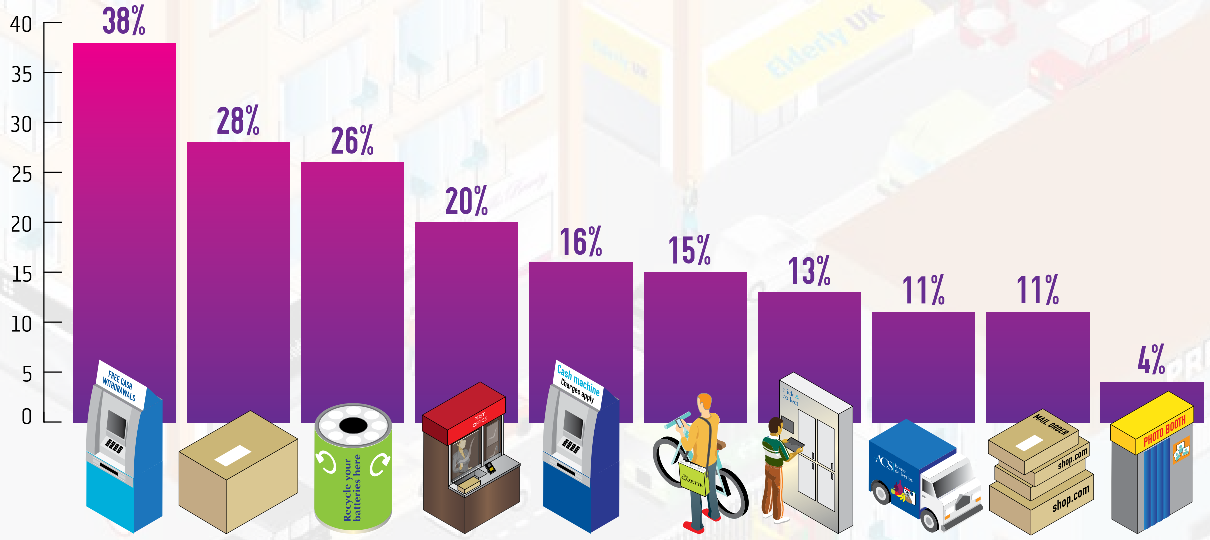
Convenience stores now offer a wide range of services and features in-store for their customers. The following data shows the percentage of the sector that incorporates each feature in-store.

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%

LICENSING

Alcohol licence	88%
Late night refreshment licence	5%
Fireworks licence	5%

SERVICES



Free to use cash machine	38%
Parcel services	28%
Recycling services	26%
Post office	20%
Charged cash machine	16%
Home news delivery	15%
Click and collect	13%
Local grocery delivery	11%
Online / mail order collections	11%
Photo booth	4%

FOOD AND DRINK

ACS | local shop

ACS FARNBOROUGH
ACS.ORG.UK

FREEZER UNITS	81%
COLD FOOD-TO-GO	49%
COFFEE MACHINE	24%
HOT FOOD-TO-GO	15%
HOT FOOD COUNTER	14%
IN-STORE BAKERY	10%
FOOD PREPARATION AREA	8%
MICROWAVE	6%

DEBIT. PIN VERIFIED.
LOYALTY CARD POINTS EARNED: 17
POINTS BALANCE: 9166

••• PLEASE KEEP FOR YOUR RECORDS •••
••• THANK YOU, CALL AGAIN SOON! •••

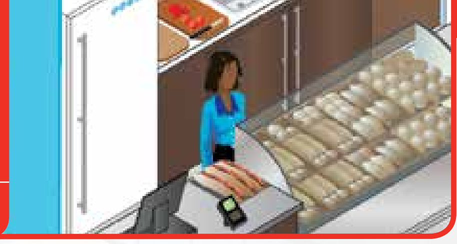
TECHNOLOGY

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 shelf edge labels	3%
Solar panels	1%

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

JOBS

ACS the voice of local shops



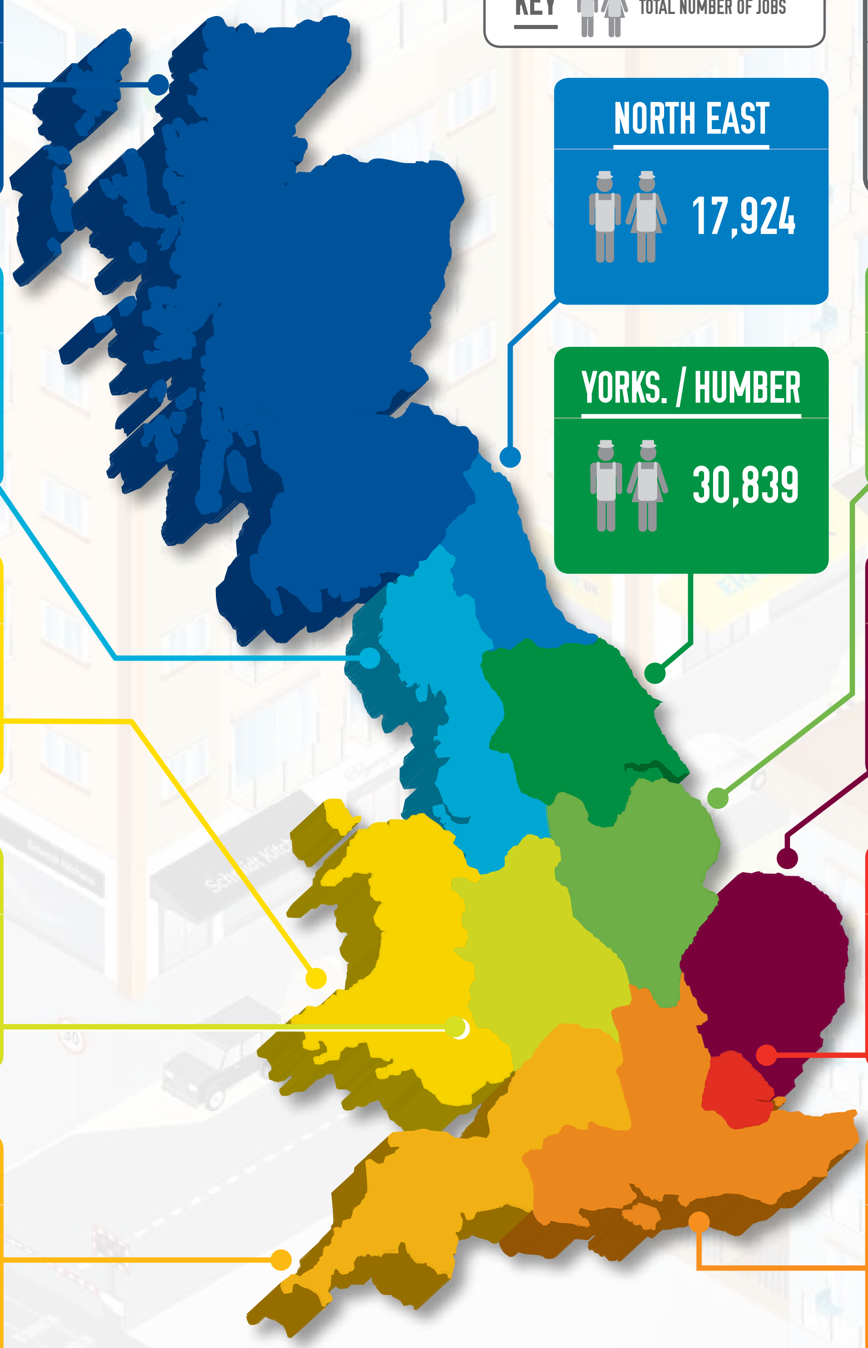
Convenience stores provide over **407,000** jobs in mainland UK

35% of shops offer food safety training

Independent shops alone make first aid training available to nearly... **48,000** people

CONVENIENCE STORE SECTOR JOBS

KEY: TOTAL NUMBER OF JOBS



	Total number of jobs
SCOTLAND	44,332
NORTH WEST	44,997
WALES	25,063
WEST MIDLANDS	38,175
SOUTH WEST	38,587
NORTH EAST	17,924
YORKS. / HUMBER	30,839
ENGLAND TOTAL	338,348
EAST MIDLANDS	30,657
EASTERN	34,527
LONDON	51,842
SOUTH EAST	50,798

PEOPLE

GENDER PROFILE

37% | 63%

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

26% Employ family only

HOURS WORKED

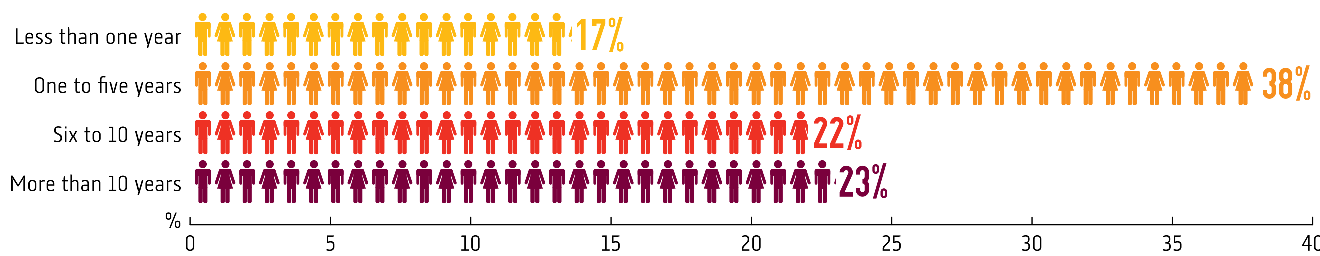
0-16: 36%

17-30: 27%

31-40: 23%

40+: 14%

LENGTH OF EMPLOYMENT



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

ACS | the voice of local shops

ENTREPRENEURS

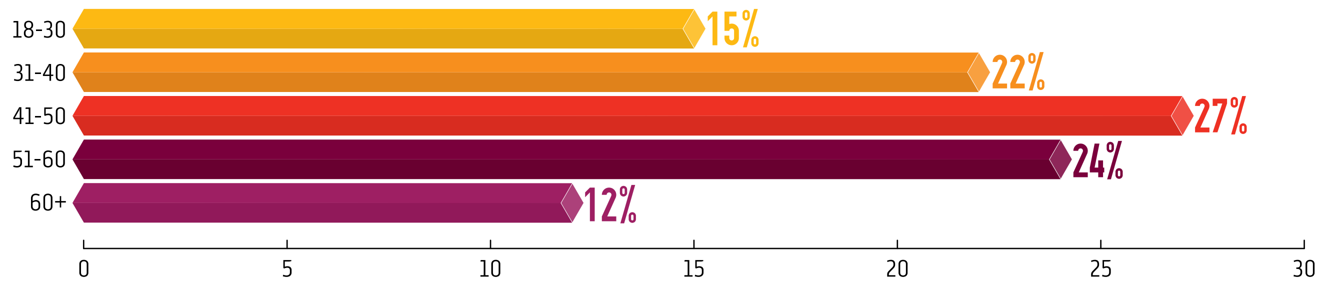
25% of shop owners work more than 70 hours per week

23% have been in the business for more than 25 years

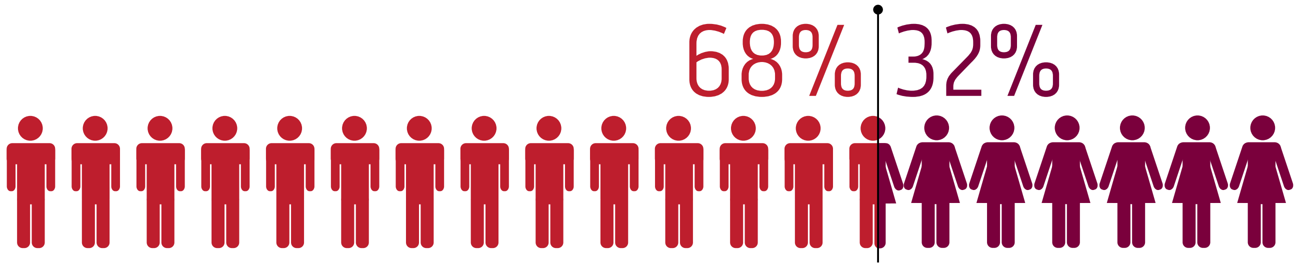
36% of businesses are owned by family partnerships

20% of shop owners take no holiday per year

OWNERSHIP AGE PROFILE



OWNERSHIP GENDER PROFILE



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

ETHNICITY OF OWNERS

SCOTLAND	
Asian or Asian British	43%
White British	52%
Other	5%
Born in UK	72%

NORTH EAST	
Asian or Asian British	52%
White British	47%
Other	1%
Born in UK	70%

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

NORTH WEST	
Asian or Asian British	48%
White British	51%
Other	1%
Born in UK	68%

YORKS. / HUMBER	
Asian or Asian British	42%
White British	56%
Other	2%
Born in UK	75%

EAST MIDLANDS	
Asian or Asian British	31%
White British	68%
Other	1%
Born in UK	77%

WALES	
Asian or Asian British	21%
White British	72%
Other	6%
Born in UK	80%

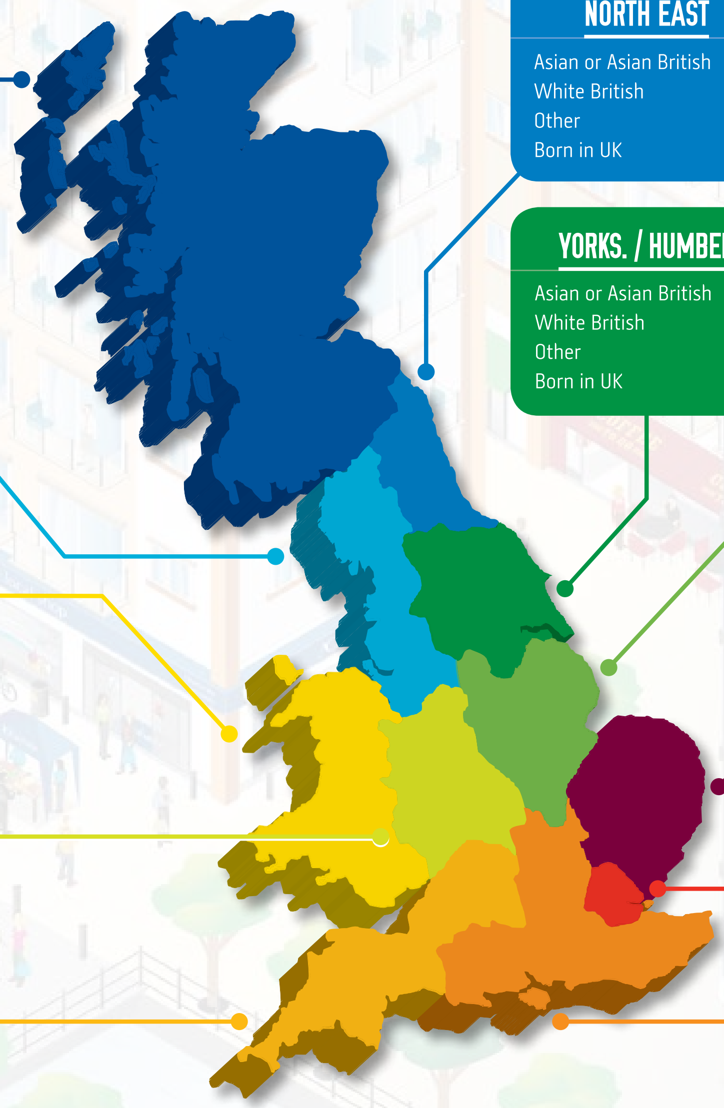
EASTERN	
Asian or Asian British	59%
White British	39%
Other	3%
Born in UK	55%

WEST MIDLANDS	
Asian or Asian British	60%
White British	38%
Other	2%
Born in UK	64%

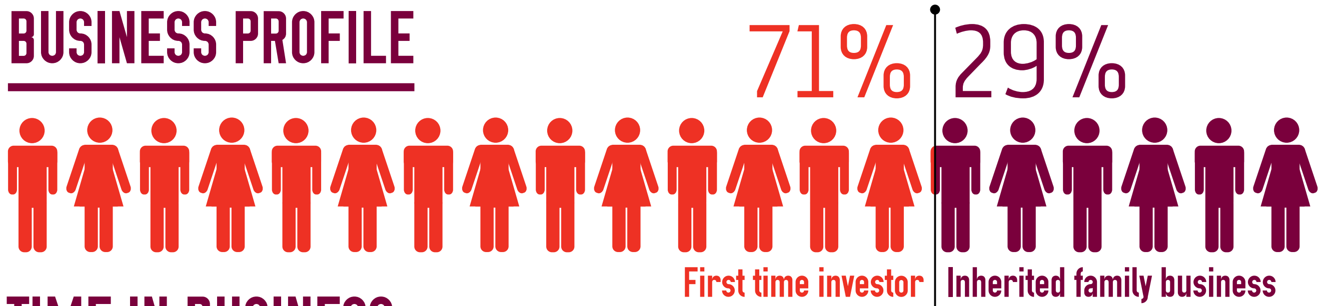
LONDON	
Asian or Asian British	83%
White British	11%
Other	6%
Born in UK	24%

SOUTH WEST	
Asian or Asian British	12%
White British	86%
Other	1%
Born in UK	86%

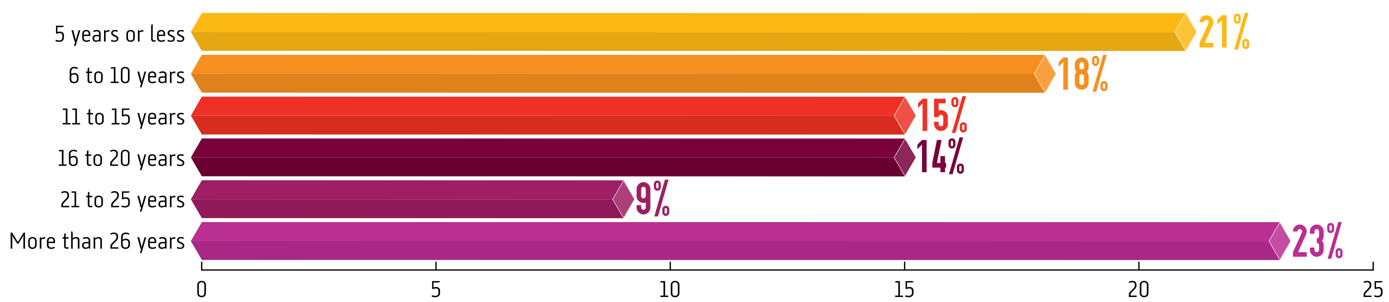
SOUTH EAST	
Asian or Asian British	48%
White British	46%
Other	6%
Born in UK	56%



BUSINESS PROFILE



TIME IN BUSINESS

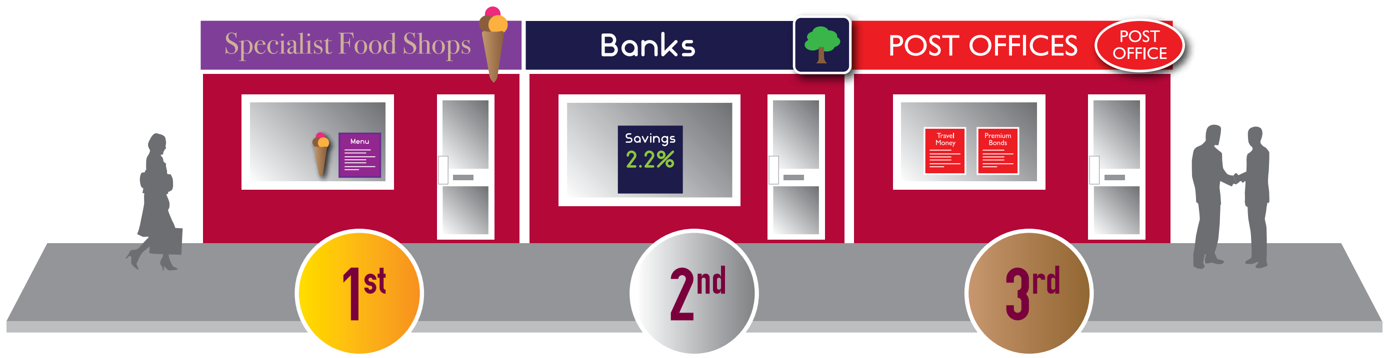


ACS | the voice of local shops

COMMUNITIES

MOST POSITIVE IMPACT ON LOCAL AREA

TOP THREE MOST WANTED SERVICES



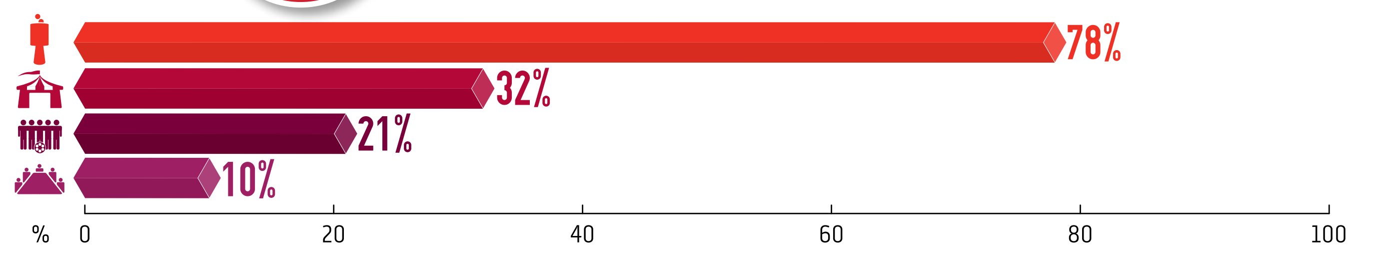
All data on this page – source: ACS/ComRes 2015

COMMUNITY ACTIVITY

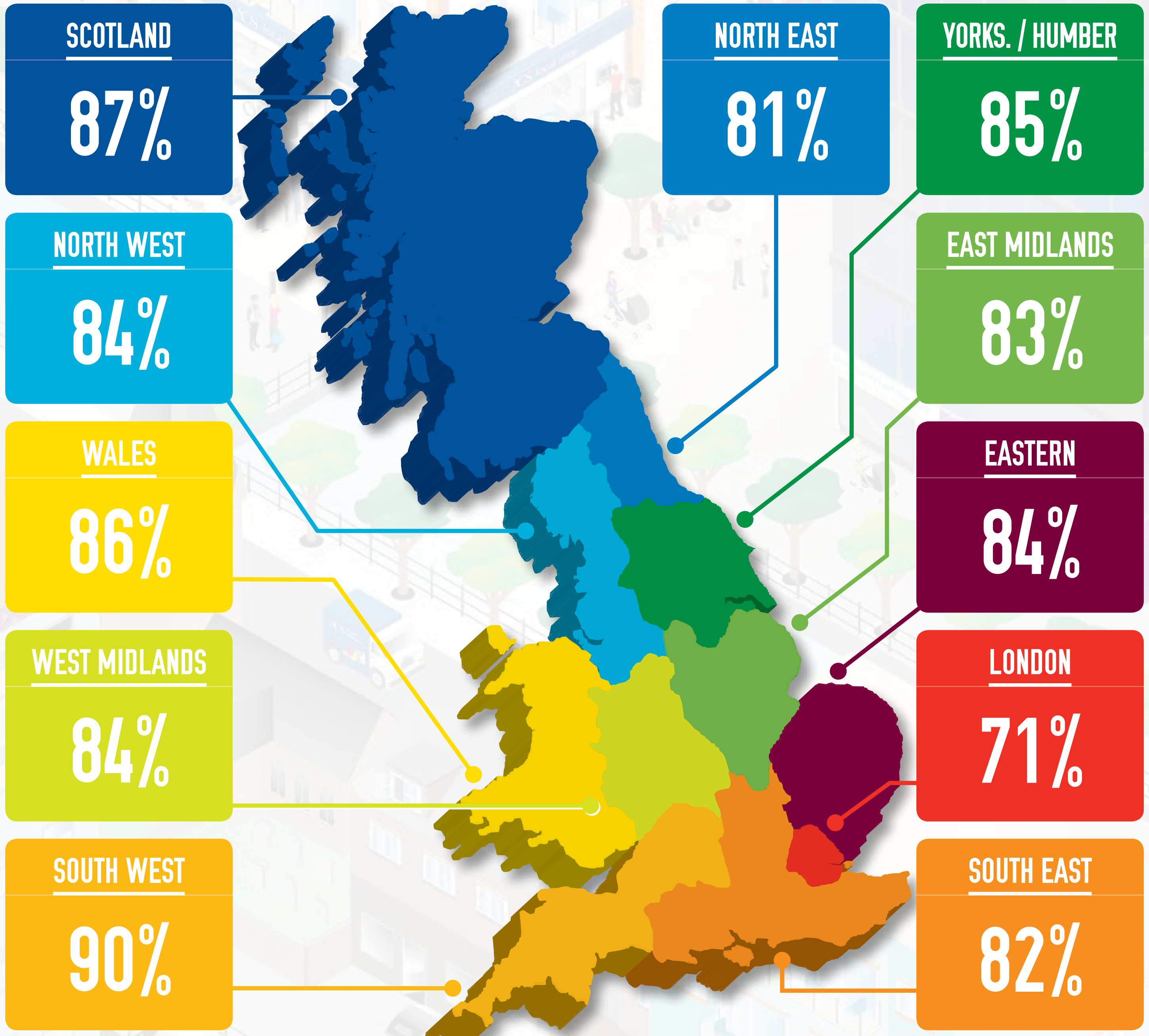
KEY
- Collecting money for a national or local charity
- Providing funding, or in kind support, to a community event
- Providing sponsorship to a local sports team or other community activity
- Community, council or local business association meeting or project

MAINLAND UK

83% of independent retailers engaged in some form of community activity in the past year



TOTAL COMMUNITY ACTIVITY BY REGION



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

ACS | the voice of local shops

CUSTOMERS

the average spend is £6.45

81%* of customers pay by cash

44% work full time

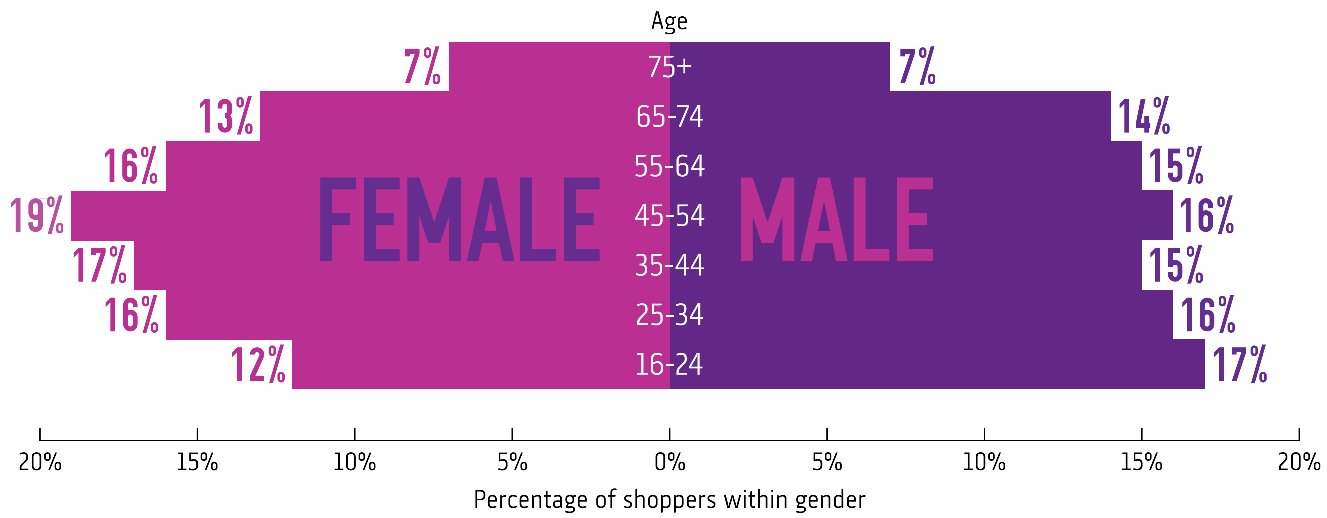
the average shopper visits their local store 3.8 times per week

17% are buying on SPECIAL OFFER

* Source: him! CTP 2014

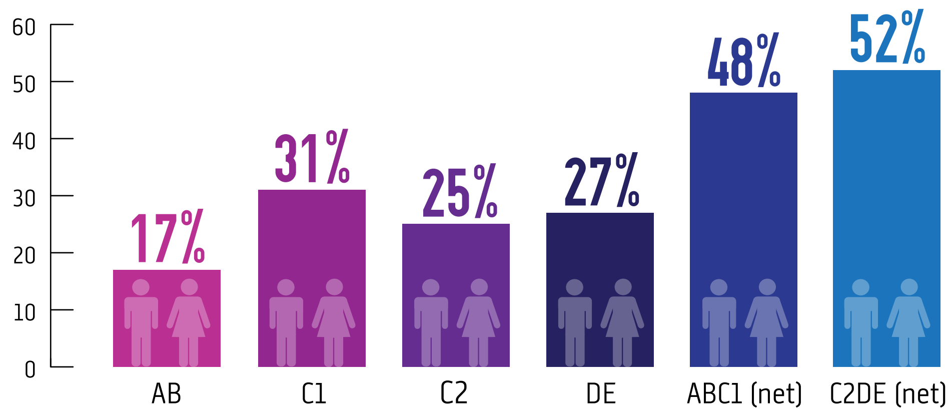
CUSTOMER PROFILE

AGE OF POPULATION / AGE OF SHOPPERS

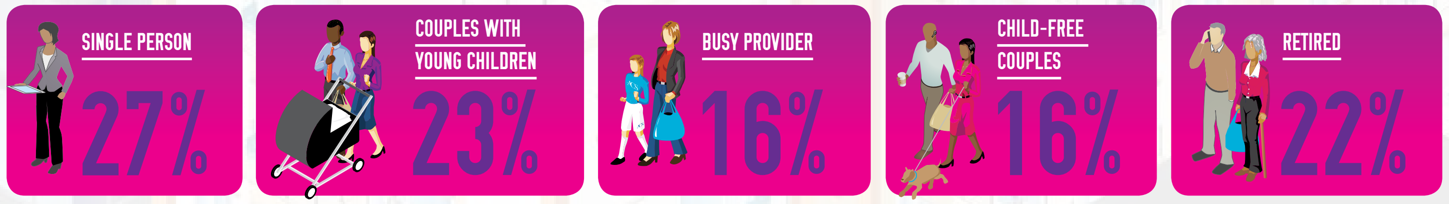


GENDER PROFILE

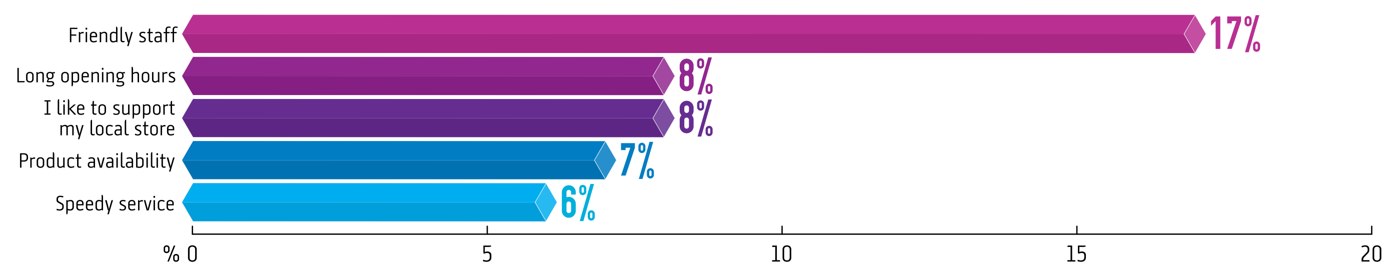
SOCIAL GROUPS



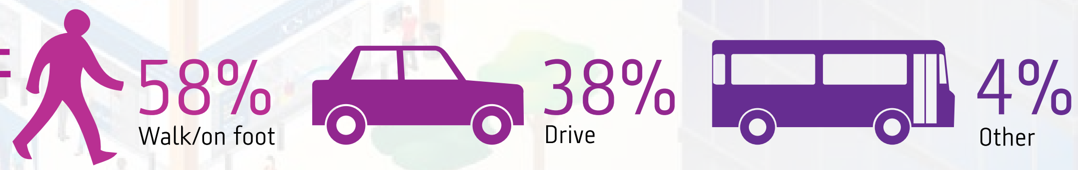
SHOPPER PROFILES



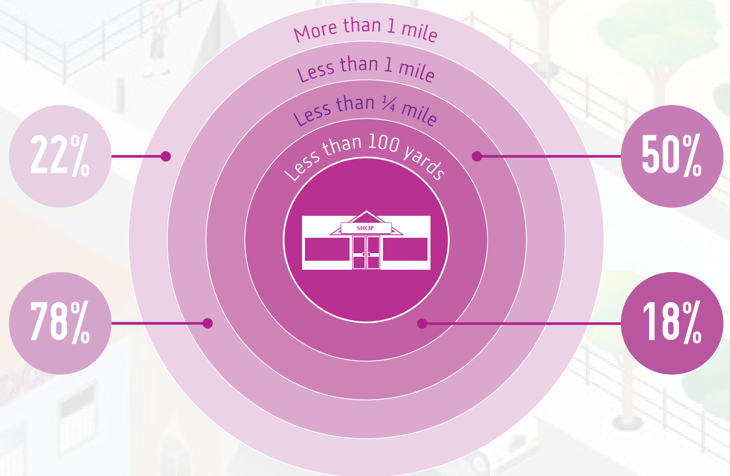
TOP FIVE DRIVERS TO STORES



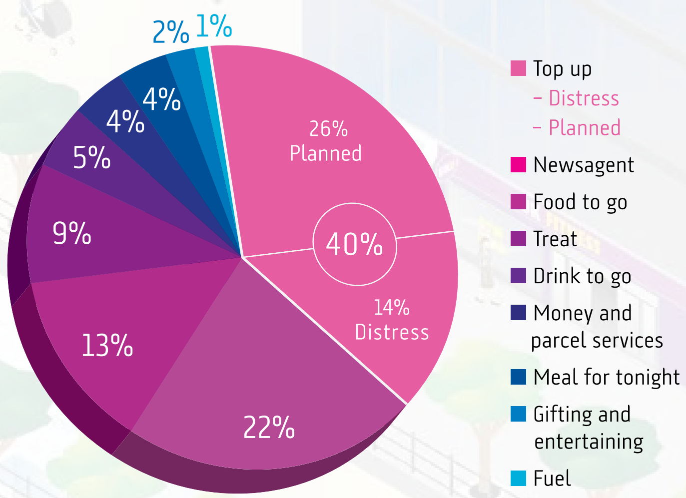
MODE OF TRAVEL TO STORES



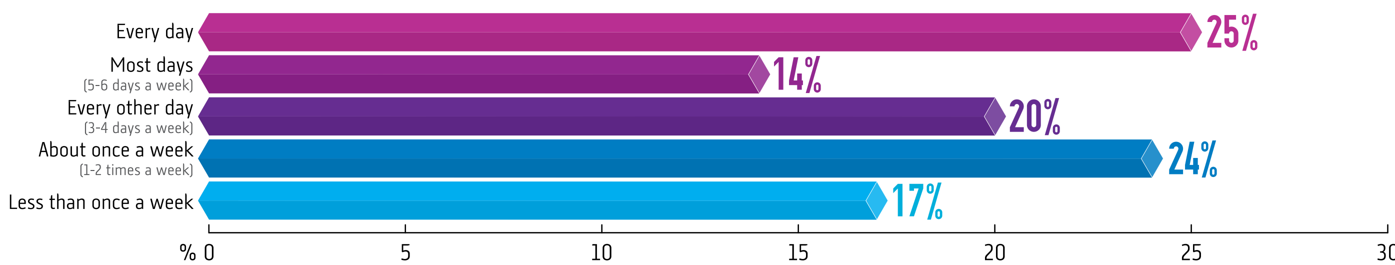
DISTANCE TRAVELLED TO STORE



SHOPPER MISSIONS



VISIT FREQUENCY



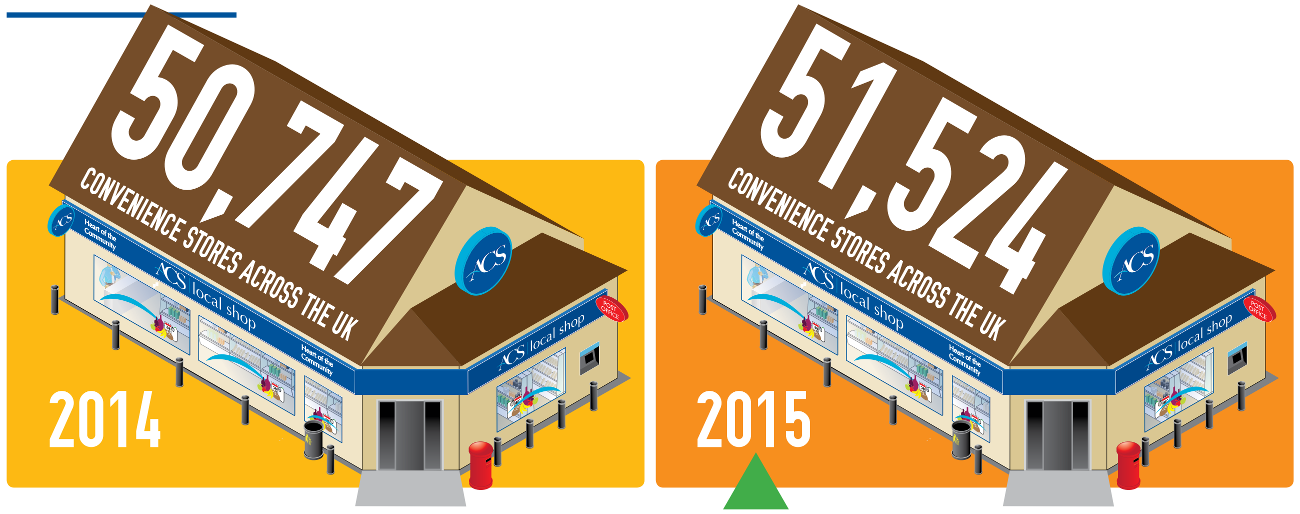
All data on this spread – source: him! CTP 2015 unless stated otherwise

ACS | the voice of local shops

COMPARISONS

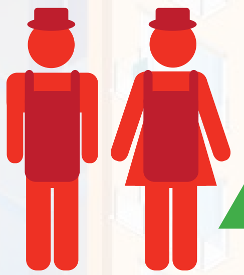
This page shows some of the significant changes between 2014 and 2015 Local Shop Reports. More detailed comparisons of the two reports are available to ACS members. Contact details are on the back page of this report.

STORE NUMBERS



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

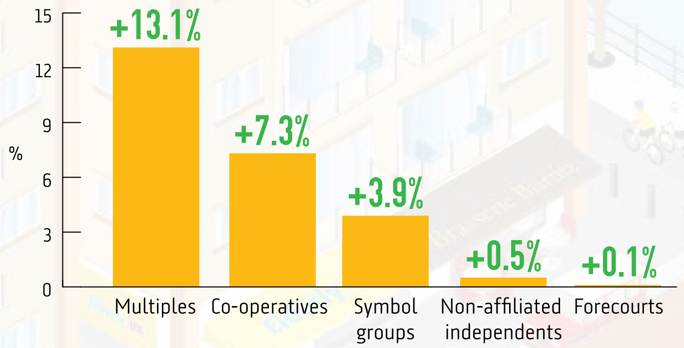
JOBS



2014: 386,710

2015: 407,743

SALES



DISTANCE TRAVELLED TO STORE

Customers travelling more than a mile:

2014 19%

2015 22%

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

AVERAGE SPEND

2014: £6.13

2015: £6.45

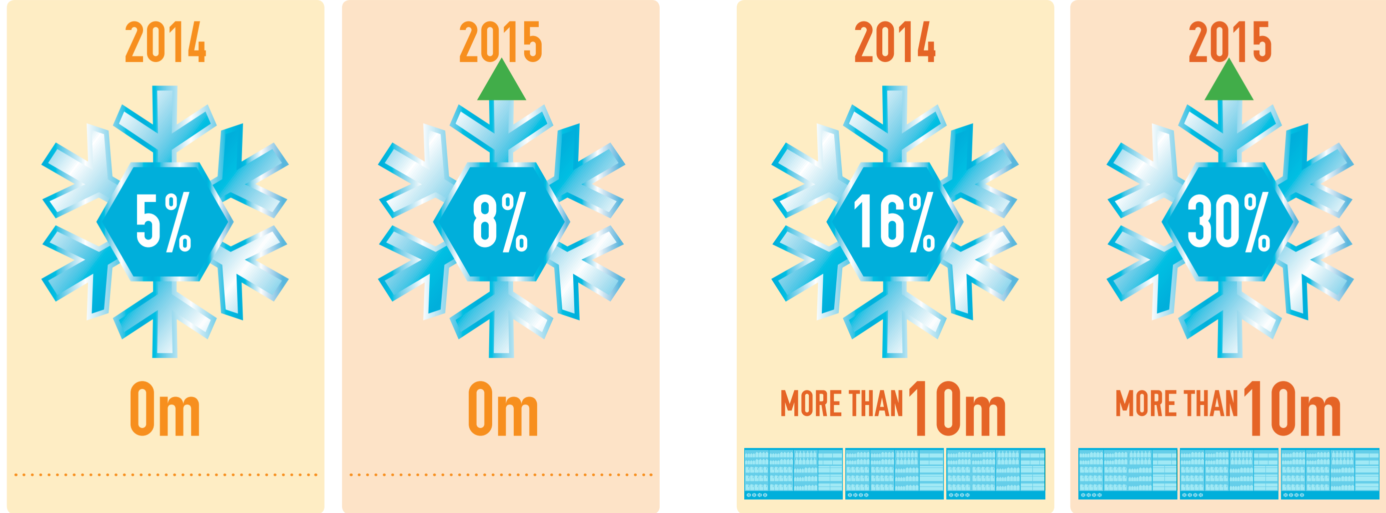
ENTREPRENEURS

AGED 18-30

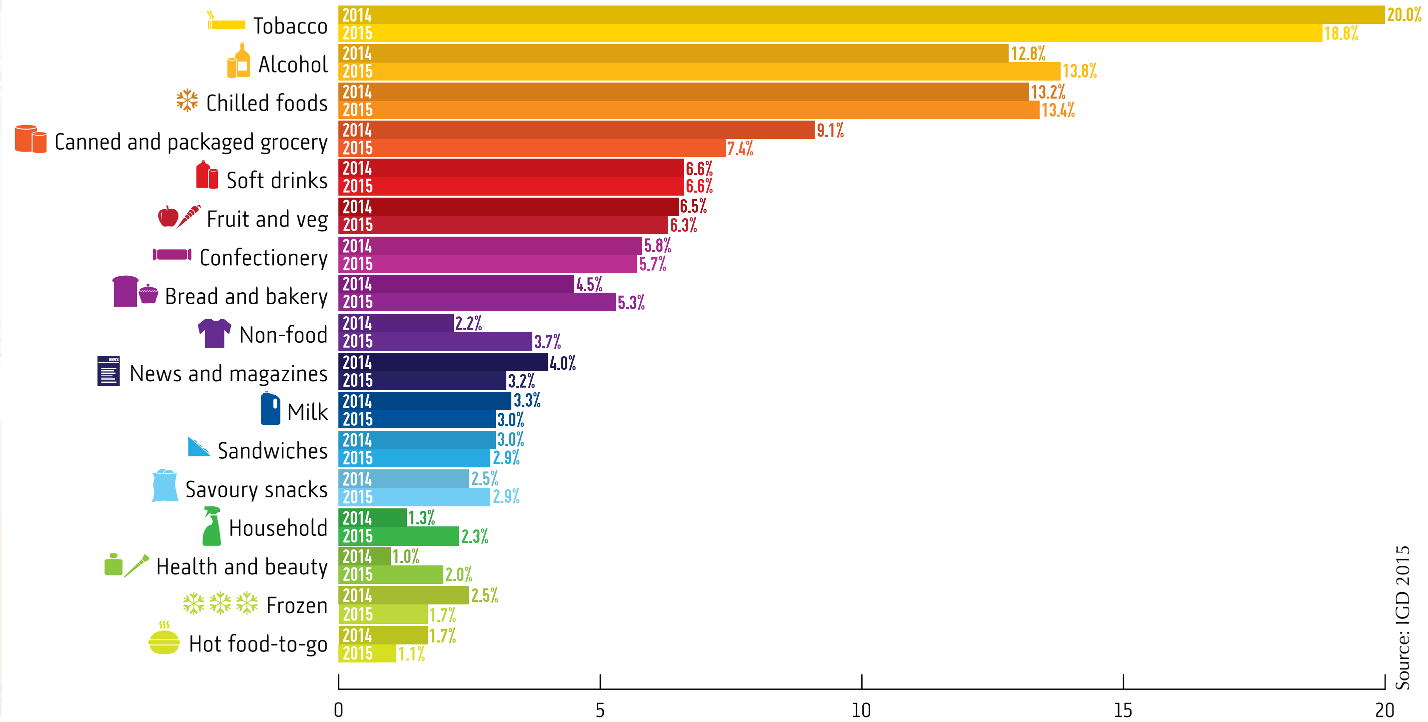
2014 11%

2015 15%

REFRIGERATION



SHOP CATEGORIES



FASTEST GROWING SHOPPER PROFILE

COUPLES WITH YOUNG CHILDREN

2014 19%

2015 23%

VISIT FREQUENCY

MOST DAYS OR EVERY DAY

2014 36%

2015 39%

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 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 buying or marketing (known as 'symbol') groups. These are represented in the survey in the same proportion as they are represented in the market. The survey covers the nine regions of England, along with Wales and Scotland as set out in the report, each returning 200 responses. A copy of the survey questions and responses is available on request by emailing peter.fairfax@acs.org.uk

2. Multiple Retailer Survey – Multiple Retailer Survey – ACS conducted a survey of its multiple chain members. This survey was based on the questions asked in the independent retailer survey, where relevant, to ensure consistency and accuracy of results. This survey returned results related to a sample of 4,999 stores. A copy of the survey questions and responses is available on request by emailing peter.fairfax@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 utilises cross referencing data from trade associations, retailers, suppliers and customer lists. This is supplemented by gap analysis and wide-search primary research.

WRBM continually updates data through re-registering customers thereby adding changed recipients, closures and new stores. This is through postal, telephone research, online delivery and events.

Convenience Retailing 2014 report – Institute of Grocery Distribution
This report is compiled by the IGD based on the sales data up to the end of 2014.

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 of 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 abides by its rules. 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 above 30 people per sq km).
- Suburban (density 10-30).
- Rural (density 0-10).

Gross Value Added is the value of goods and services produced in an area, industry or sector of an economy. This was calculated by calculating the GVA as a percentage of sales for typical shops using the ACS Costs Barometer and multiplying this by the total value of sales as given in the IGD Convenience Retailing 2015 Report.

Shops (page 6-7)
- Store numbers-figures sourced from WRBM. These figures were divided by the mid-2014 ONS regional population estimates to obtain population per shop.
- When calculating store size, don't know responses have been excluded.
- Store Ownership – ACS calculation based on figures sourced from WRBM.
- Premises Ownership – this figure relates to independent retailers only and is based on their response to the questions in the survey.

Sales (page 8-9)
- Store ownership/share of sales – figures sourced from the IGD Convenience Retailing 2015 Report. IGD have restated the size of the convenience channel to ensure that all sales attributed to it are meeting IGD's 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 services 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.

  Figures for jobs per region were calculated by obtaining an average employment figure per store and multiplying this by the number of stores in each region. 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:

  - Independents (non-affiliated and independently-owned symbol stores, excluding forecourts): 5.49.
  - Independent forecourts (including independent-owned symbol forecourts): 5.75.
  - Multiples (inc. co-operatives, forecourt multiples, multiple-owned symbol stores): 17.72.
  - Whole sector average: 7.91.

- People – Data for age and gender statistics, family employment, hours worked, length of employment and employee lifestyles was obtained from ACS Independents and Multiples surveys.

- Qualifications – ACS Independents and Multiples surveys asked respondents to list which qualifications were offered to staff. 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 statistics for independent retailers (including those who own symbol stores) only.

- Asian or Asian British category combined results received for each of the following categories: Asian or Asian British, Indian, Pakistani, Bangladeshi, any other Asian background.

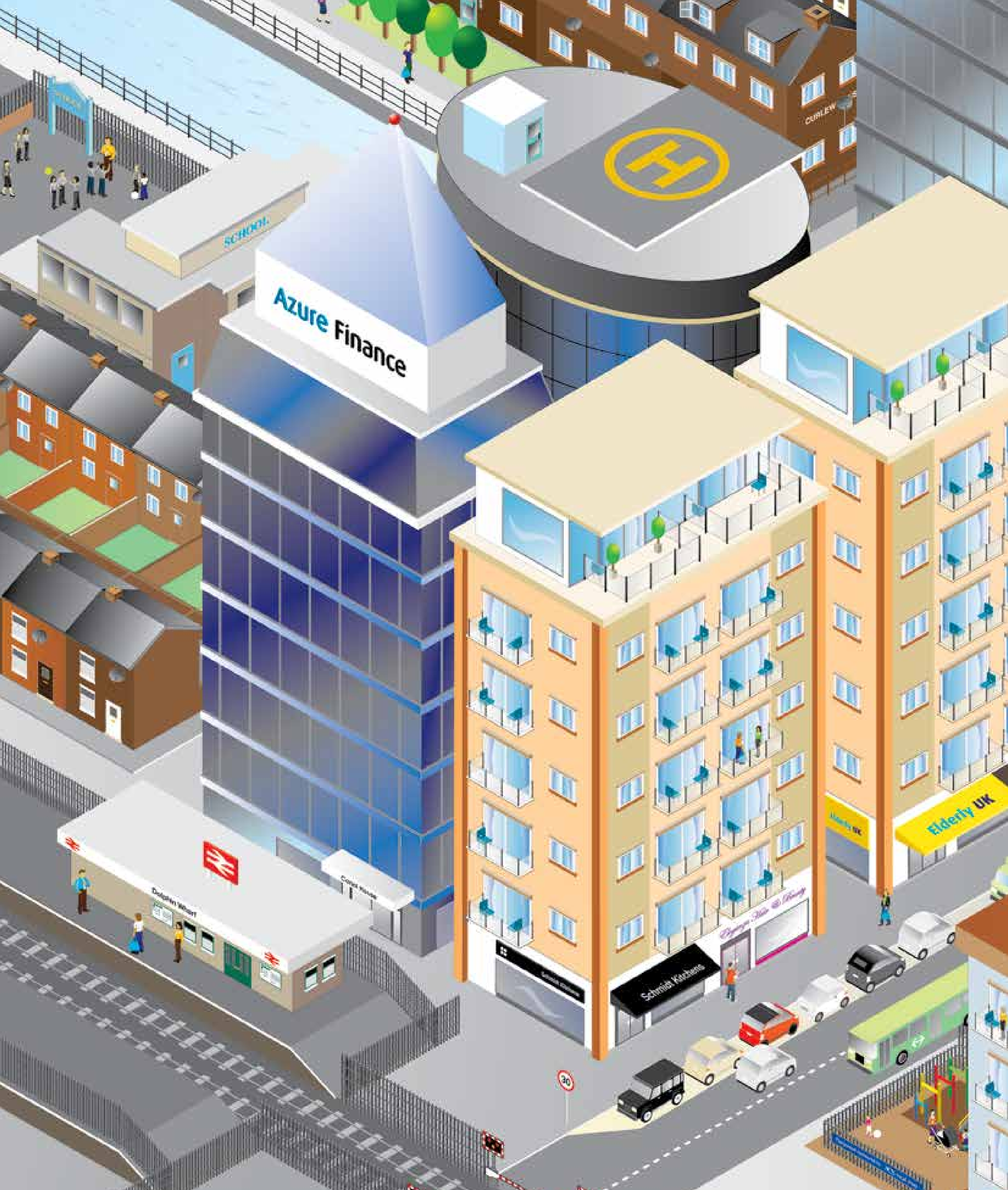
Communities (page 16-17)
- Most positive impact - Members of the public were given the question and request "Which of the following types of services do you believe has the most positive impact on your local area? Select the three which you think have the most positive impact". Data were weighted to be nationally representative of the population in Great Britain. Answers 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. Answers 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 (including those who own symbol stores) only.

Customers (page 18-19)
- All data in this section was obtained from him! CTP 2014.

NOTES



ACKNOWLEDGEMENTS

This report would not have been possible without the support of a number of industry and research organisations that have helped by providing data. These sources are referenced alongside the relevant sections of the report, and those organisations are:

CONTACTS

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

the voice of local shops

#LocalShopReport