THE LOCAL SHOP REPORT 2013

ACS the voice of local shops

A report by the Association of Convenience Stores

CONTENTS

ABOUT THE REPORT

The Local Shop Report 2013 is the second edition of this introduction to the economically and socially vital convenience store sector. The report contains all the insights from the 2012 report updated to reflect the changes in this dynamic market place, it also includes new insights that have been included based on feedback on the 2012 report.

New for the 2013 report is a chapter developed by ACS in conjunction with the world leading Oxford Institute for Retail Management that highlights some of the key trends that are shaping the near future for local shops.

This report brings together data from well-respected research organisations such as him! Research and Consulting, the Institute of Grocery Distribution, Nielsen and William Reed Business Media, with new research designed and commissioned by ACS. Together these data sources provide a rich picture of the economic and social value of local shops.

CONVENIENCE STORES – THE MODERN LOCAL SHOP

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:

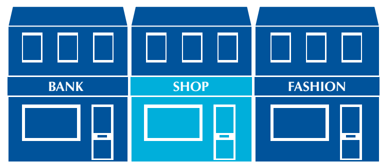
- Open for long hours, usually seven days a week, and not subject to restrictions under the Sunday Trading Act.
- Occupying a small store premises - usually smaller than 280 square metres or 3,000 square feet (see page 7).
- Stocking a broad range of product categories (see page 9).

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

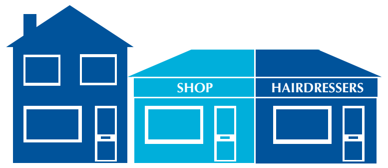
Industry experts tend to categorise the industry by ownership types (for a full breakdown see page 7) – there are:

- 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);
- Unaffiliated independents – these tend to be the smallest businesses in the market.

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

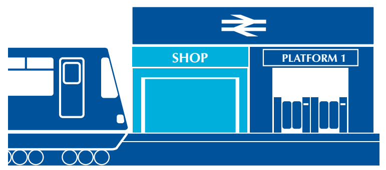


High Street
Operating as part of a mix of stores serving the needs of those living in centres and the shopping needs of workers and shoppers.



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

Rural village
A 'traditional' local shop often providing the only local shopping option for the local community.



Commuter sites
A shop located in high volume commuter sites like railway stations, where people can buy things to eat or consume on the go, or on their way to and from work.

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

Convenience stores are located in communities of all types:

RURAL 38%

SUBURBAN 25%

URBAN 37%

Source: WRBM/Nielsen

SUMMARY

ACS | the voice of local shops

SHOPS

There are 49,888 convenience stores providing access to essential grocery retail throughout mainland Britain.

- 41,356 in England.
- 5,536 in Scotland.
- 2,996 in Wales.

Scotland has more shops per head than any other part of the country with one shop for every 949 people, whereas the south east region has the least with one shop for every 1,431 people.

The vast majority – 77% – of the shops are owned and operated by small business owners or 'independents'. Shops run by independents tend to be smaller both in terms of size and business turnover.

Over half – 58% – of the total number of convenience stores are very small (under 1,000 square feet).

More than 57% of independent retailers own the premises they operate from (rather than rent).

Convenience stores on petrol forecourts are an important part of the market with a combination of multiple and independent stores making up 17% of convenience stores.

JOBS

Convenience stores provide around 375,000 jobs.

- 310,814 in England.
- 41,606 in Scotland.
- 22,517 in Wales.

Job profiles
Jobs in convenience are local and flexible therefore it attracts a wide variety of people:

- 65% of employees are women.
- 26% are aged between 16 and 24.
- 9% are aged over 60.

74% of employees work part time (less than 30 hours a week). Many have care commitments with 52% looking after pre-school or school age children and 21% engaged in full or part time study.

Staff turnover defined as people employed for less than one year is 14%.

58% of employees have worked between one and five years, 24% over 10 years.

Convenience stores offer valuable career and training opportunities. 90% of businesses offer in store training.

Family Employment
Amongst independent businesses 31% employ only themselves and members of their family. 64% employ at least one other member of their family.

CUSTOMERS

The age profile of customers matches closely to the distribution of ages in the population, suggesting that most people use convenience stores.

There is a slight bias towards older customers and women.

Customers are overwhelmingly local with more than 81% travelling less than a mile to use the store. 57% travel to their local shop by foot, compared to 39% by car and 3% by public transport.

86% of customers use their local shop at least once a week. 22% use their local shop every day.

SALES

The total value of sales in convenience stores is £35.6bn which accounts for 1/5 of the UK grocery market.

Sales in convenience grew by 5% year on year.

Sales by ownership
Symbol groups* are the biggest contributor to sales, accounting for 41.5% (£14.8bn) of the total amount of sales. Non-affiliated independents account for 18.4% (£6.5bn) total sales.

Multiple chains and co-operatives account for 29% (£10.3bn) of total sales.

Sales by category
Convenience stores are increasingly catering for top up grocery shopping needs with chilled and fresh fruit and veg accounting for 19.3% of sales.

Diversification into a range of additional services is a vital feature for example:

- 54% provide cash machines.
- 64% of independents provide bill payment services.

Home delivery, often seen as the preserve of the major supermarkets is an important feature of convenience retailing with one in four of all stores providing home grocery delivery.

* Symbol group means independent and multiple retailers trading together as part of a group.

ENTREPRENEURS

The vast majority of shops (77%) are run by small business owners. It is an entrepreneurial sector; more than 73% of owners are the first generation of their family to own or run a business in the UK.

Among this group:

- One third are women.
- One in 10 is under 30 years old.
- One in five has been in business for less than 5 years.
- One in five business owners own more than one shop.

Convenience store owners work very long hours – 57% work longer than 50 hours a week and 28% take less than 10 days holiday per year

Ethnicity
Almost half of business owners cite themselves to be Asian or British Asian (46%) and just over half (51%) cite themselves to be White British.

There are significant variations between regions; in London 86% of independent retailers are Asian, whereas they account for only 17% of owners in the south west.

The predominant non-English languages spoken by retailers are Punjabi, Gujarati, Hindi and Urdu.

In Wales 27% of retailers speak Welsh.

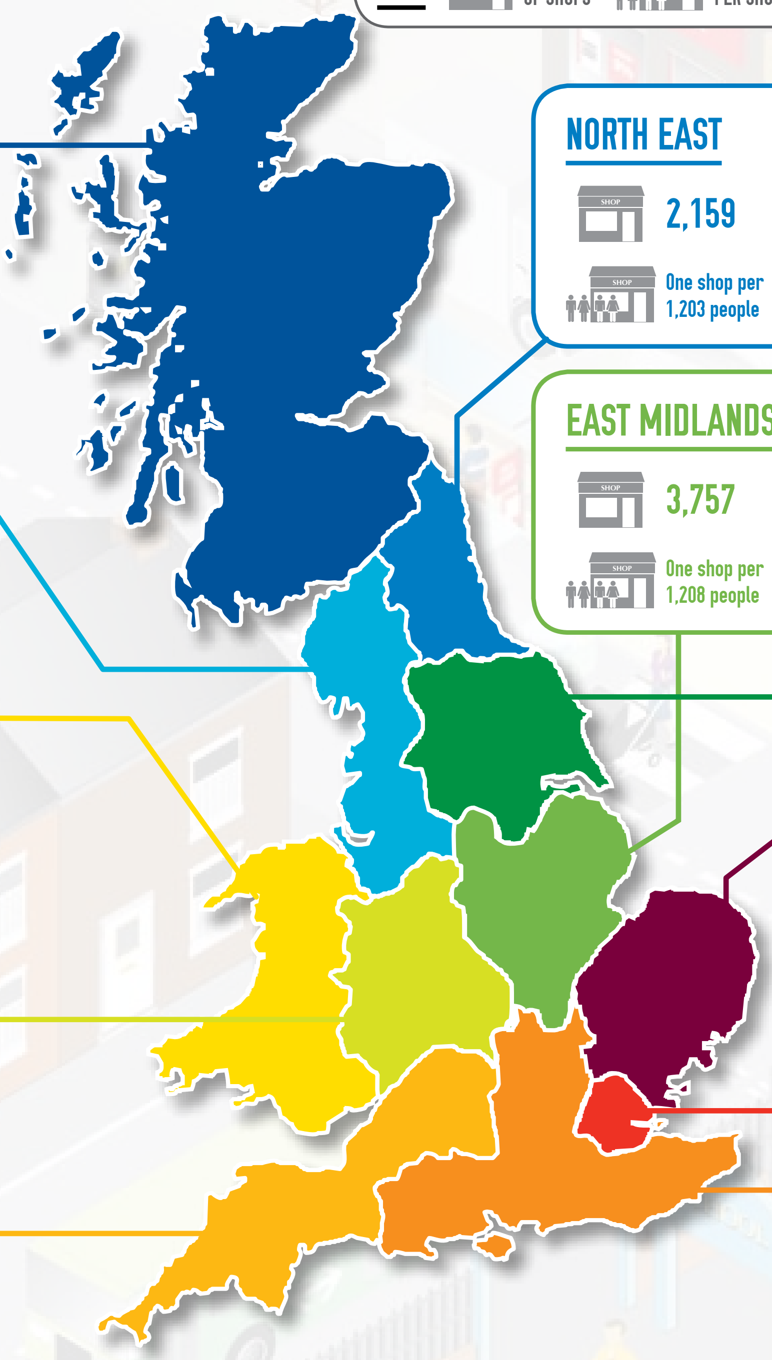
Data related to overall Sales is sourced from the Institute of Grocery Distribution; data related to Shops is sourced from William Reed Business Media and Nielsen, data related to Customers is sourced from him! Research and Consulting. All other data is sourced from bespoke research for ACS. For comprehensive details as to the sources used see the full report at www.acs.org.uk/research

SHOPS

SHOP NUMBERS

There are **49,888 convenience stores in England, Wales and Scotland.** Scotland has more shops per head of the population than any other part of the country with one shop per 949 people, whereas the south east has the least with one shop per 1,431 people.

KEY: NUMBER OF SHOPS / POPULATION PER SHOP



	Number of shops	Population per shop
SCOTLAND	5,536	One shop per 949 people
NORTH WEST	5,510	One shop per 1,281 people
WALES	2,996	One shop per 1,023 people
WEST MIDLANDS	4,777	One shop per 1,174 people
SOUTH WEST	4,590	One shop per 1,155 people
NORTH EAST	2,159	One shop per 1,203 people
EAST MIDLANDS	3,757	One shop per 1,208 people
ENGLAND TOTAL	41,356	One shop per 1,284 people
YORKS. / HUMBER	4,135	One shop per 1,297 people
EASTERN	4,299	One shop per 1,364 people
LONDON	6,084	One shop per 1,349 people
SOUTH EAST	6,045	One shop per 1,431 people

Source: WRBM/Nielsen 2013 and ONS 2011

SHOP SIZE

Source: ACS Survey 2013

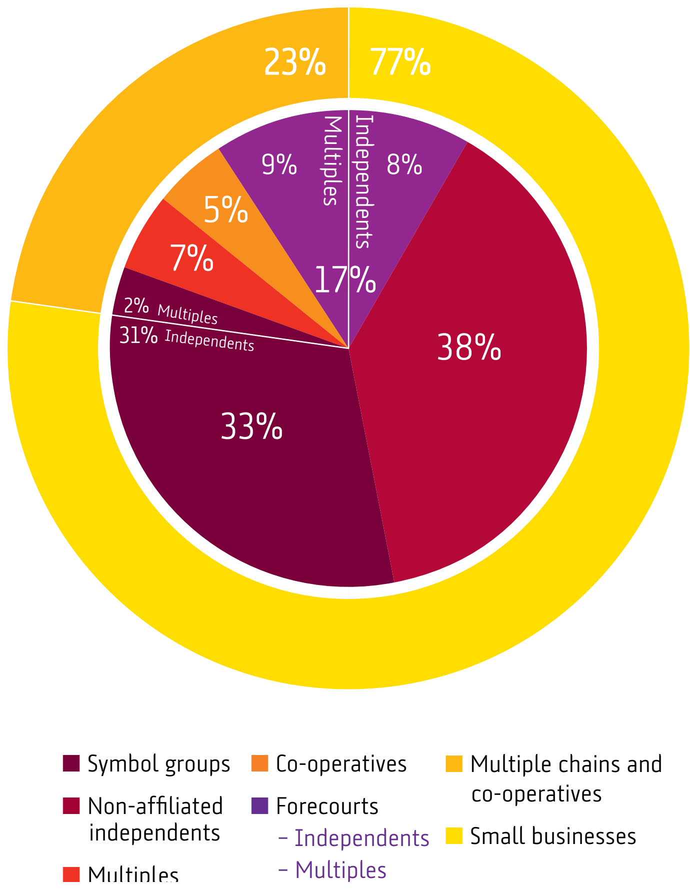
A majority of convenience stores are very small less than 1,000 square feet (or 93 square metres). Independent retailers tend to run smaller stores, whereas higher percentages of multiple and symbol stores are in the larger categories.

SHOP OWNERSHIP

The vast majority of shops in the convenience sector are owned and operated by small business owners or 'independents'. Together independents operate 77% of the shops in the sector. However shops run by independents tend to be smaller, both in terms of size and turnover. The chart on page 8 shows how multiple chains and co-operatives represent a significantly higher proportion of sales as compared to the number of stores they operate.

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 15,000 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 run from a centralised head office.

Convenience stores operated 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 18% of the convenience sector.



Source: WRBM/Nielsen 2013

PREMISES OWNERSHIP

Source: ACS Survey of Independent Retailers 2013

SALES

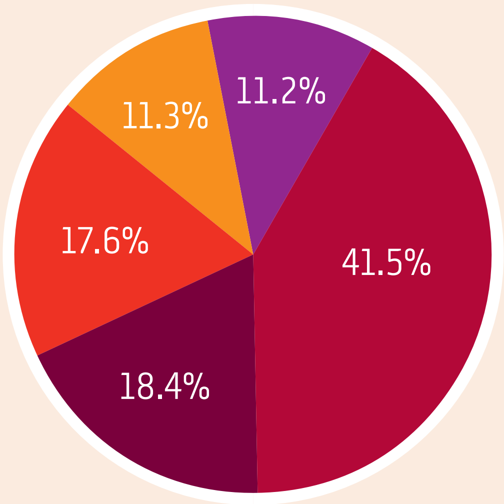
The total value of sales through the convenience market in 2012 was £35.6 billion. This amounts to 1/5 of the total grocery market. It is also a sector in considerable growth having increased by a healthy 5% over the last year.

Convenience stores offer a wide range of products and services within their communities, with notable and increasing variety in both the range of goods and services on offer. These range from the innovative click and collect facilities, to highly personal home grocery delivery services. The role of the local shop as provider of services such as bill payment and cash machines is well established.

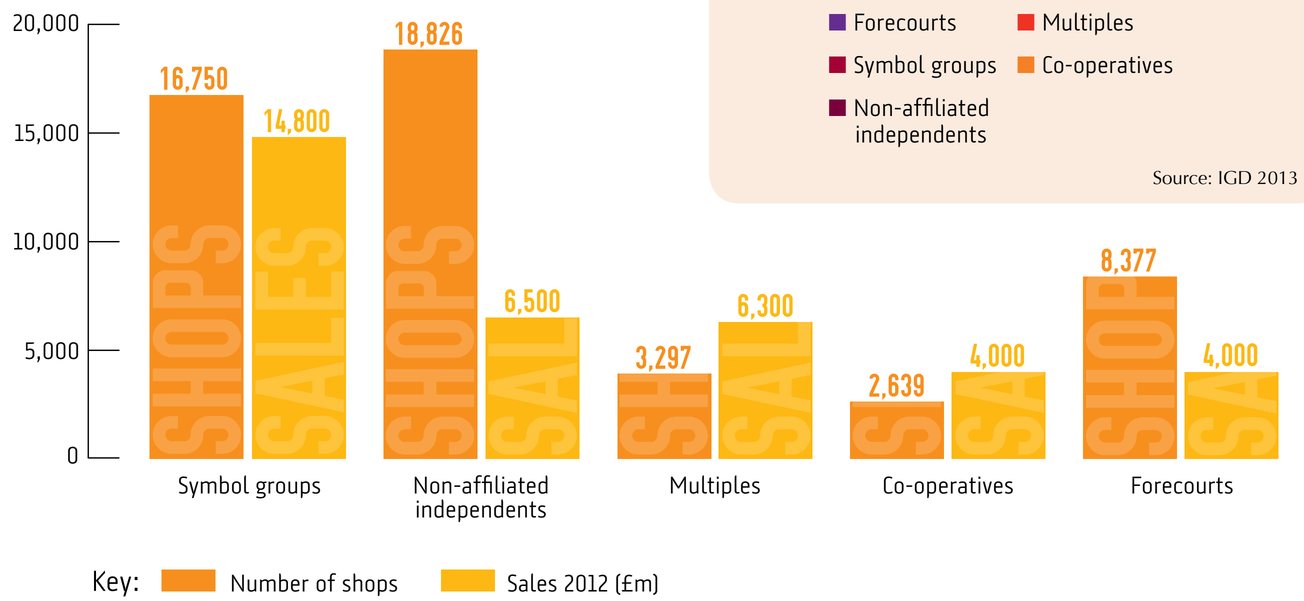
SHOP OWNERSHIP / SHARE OF SALES

Independent retailers' significant predominance in terms of number of stores is reflected in them also being the biggest contributor to the overall sales of the sector. However they significantly under trade compared to multiple and co-operative run shops, these two business types account for only 12% of the shops, but 29% of the sales.

SALES / MARKET SHARE



Source: IGD 2013

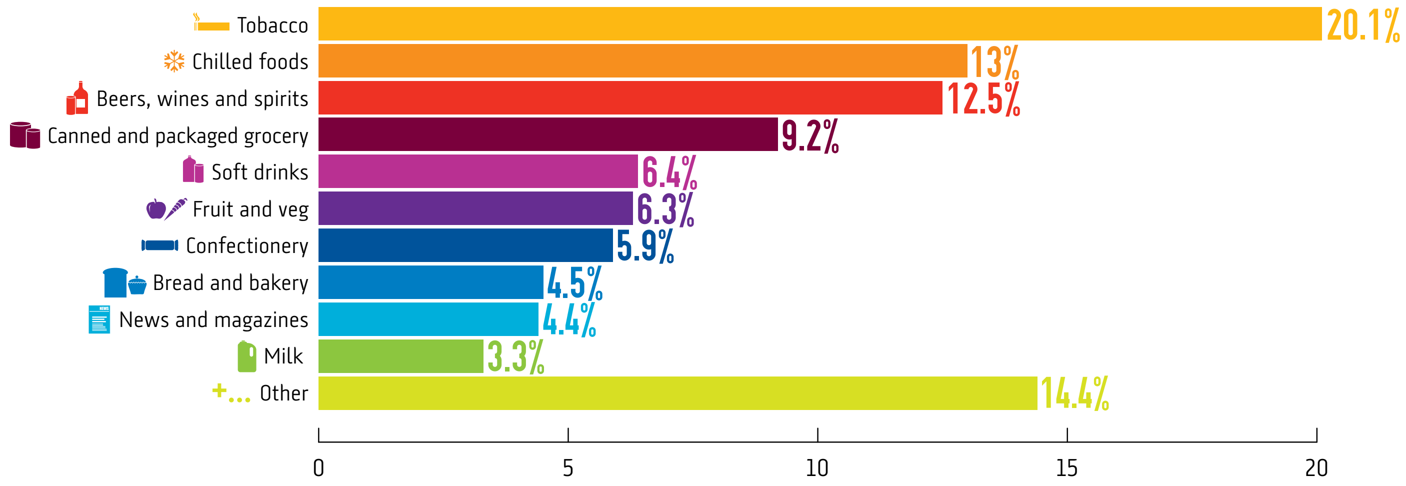


WRBM/Nielsen, sales data: IGD 2013

SHOP CATEGORIES

There is a lot of variety between the offering of different convenience stores depending on the type of store that they are, the location where they trade and their ownership type.

This chart shows the average sales contribution made by the main product categories.



Source: IGD 2013

More than 1 in 4 shops offer grocery delivery

54% of shops have cash machines

64% of independent shops offer bill payment services

4,730 (17%) feature contactless payment

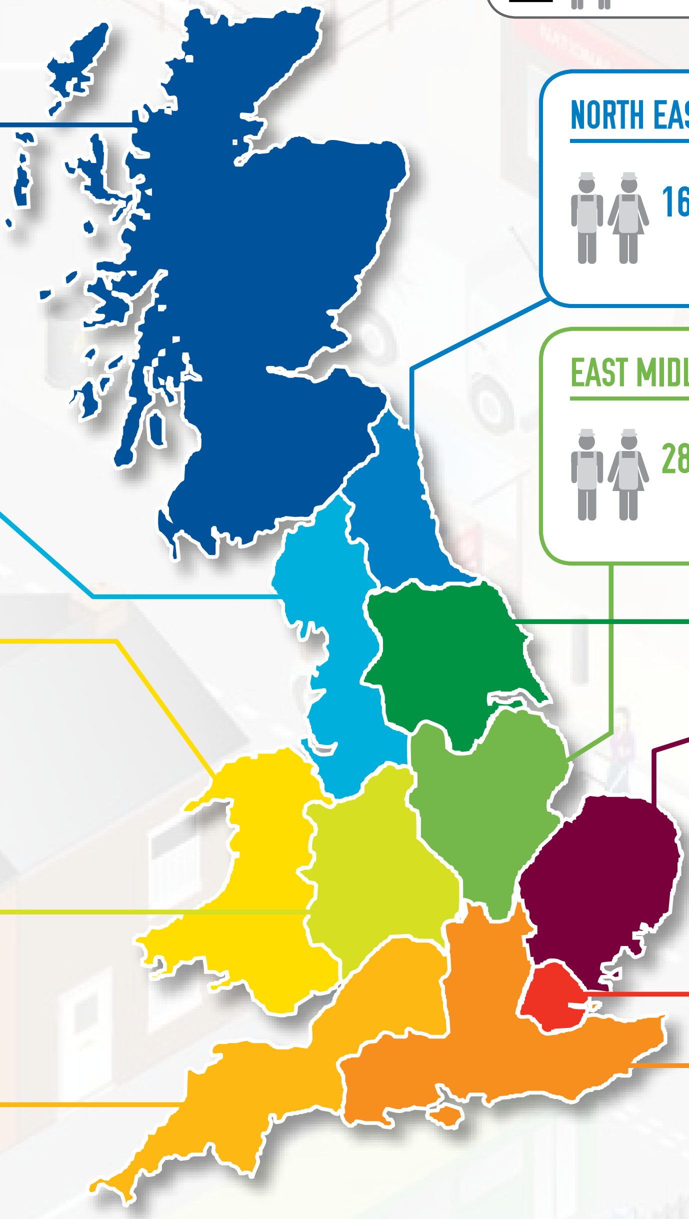
Source: ACS Survey 2013

JOBS

Convenience stores provide around 375,000 jobs, an average of 7.5 employees per store. The majority of employees are women; more than two thirds of employees work part time (less than 30 hours per week). This part time work is often filled by people juggling other lifestyle commitments for example 52% of employees have childcare commitments.

Amongst independent businesses, family employment is an important feature, 31% of independents employ only themselves and other family members. 64% employ at least one member of their family.

KEY: TOTAL NUMBER OF JOBS



	Total number of jobs
SCOTLAND	41,606
NORTH WEST	41,411
WALES	22,517
WEST MIDLANDS	35,902
SOUTH WEST	34,496
NORTH EAST	16,226
EAST MIDLANDS	28,236
ENGLAND TOTAL	310,814
YORKS. / HUMBER	31,077
EASTERN	32,309
LONDON	45,725
SOUTH EAST	45,432

26% of employees are aged 16-24

90% of shops offer in-store training

45% of shops offer staff the opportunity of formal qualifications

PEOPLE

GENDER PROFILE →

35% 65%

AGE PROFILE

26% 16-24 years old

9% Over 60 years old

FAMILY EMPLOYMENT →

64% Employ at least one other family member

36% Employ no family members

31% Employ family only

HOURS WORKED →

0-16: 35%

16-30: 39%

30-40: 20%

40+: 6%

LENGTH OF EMPLOYMENT →

	%
More than 10 years	24%
More than 5 years	34%
More than 1 year	58%
Less than 1 year	14%

%: 0, 10, 20, 30, 40, 50, 60

EMPLOYEE LIFESTYLES →

	%
Care commitments for children of pre-school or school age	52%
Care commitments for either disabled or elderly dependents	6%
Engage in full or part time study	21%
Are retired or semi-retired	14%
Engage in other paid employment	10%

%: 0, 10, 20, 30, 40, 50, 60

All data on these pages – source: ACS Survey 2013

ENTREPRENEURS

The vast majority of shops are run by small business owners. More than 73% are new entrepreneurs and one in five established their business within the last five years. These business owners work very long hours, with more than 57% working more than 50 hours per week.

Almost half of business owners (46%) cite themselves to be Asian or Asian British, compared to 51% that cite themselves to be white British. A third of retailers are first generation immigrants. There are significant regional variations in the country; in London 86% of independent retailers are Asian British, where as they only account for 17% in the south west.

40% of businesses are owned by family partnerships

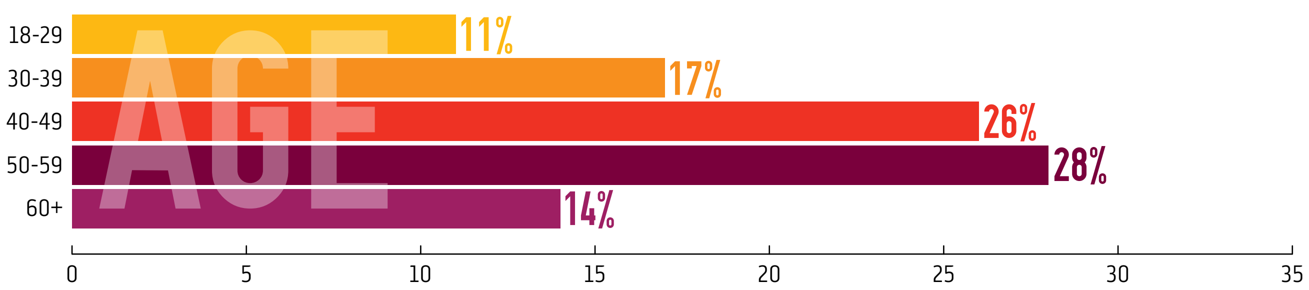
1 in 10 is under 30 years old

1 in 5 local shop owners own more than one shop

28% take less than 10 days holiday per year

57% of shop owners work more than 50 hours per week

OWNERSHIP AGE PROFILE

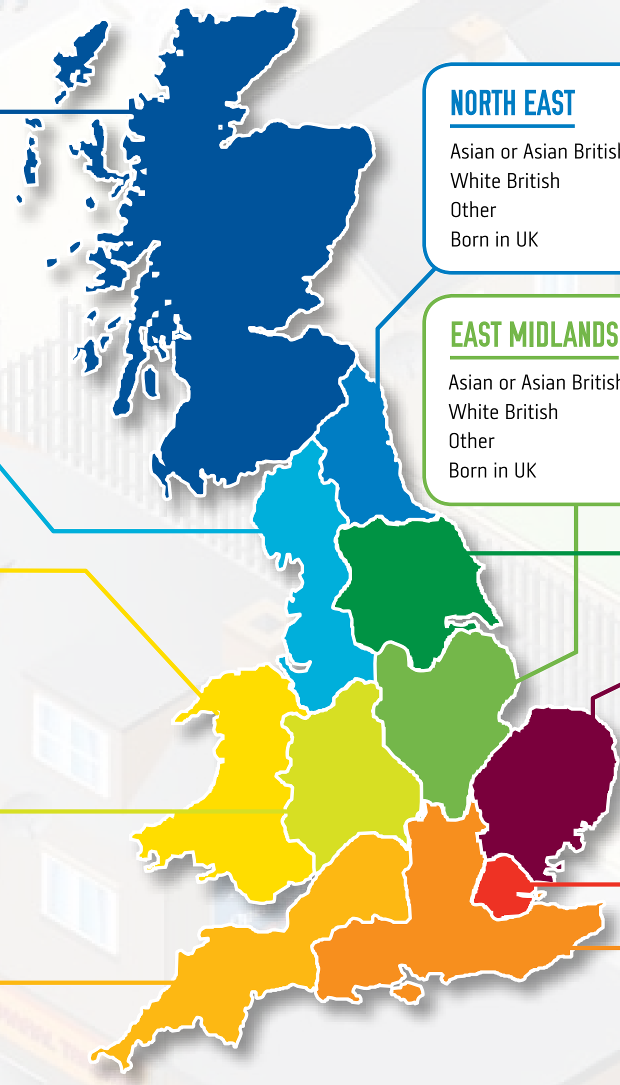


OWNERSHIP GENDER PROFILE

67% | 33%

All data on this page – source: ACS Survey 2013

ETHNICITY OF OWNERS



SCOTLAND	
Asian or Asian British	35%
White British	61%
Other	2%
Born in UK	77%

NORTH WEST	
Asian or Asian British	39%
White British	59%
Other	1%
Born in UK	76%

WALES	
Asian or Asian British	18%
White British	79%
Other	1%
Born in UK	86%

WEST MIDLANDS	
Asian or Asian British	65%
White British	32%
Other	0%
Born in UK	62%

SOUTH WEST	
Asian or Asian British	17%
White British	81%
Other	0%
Born in UK	83%

NORTH EAST	
Asian or Asian British	42%
White British	57%
Other	2%
Born in UK	76%

EAST MIDLANDS	
Asian or Asian British	58%
White British	40%
Other	1%
Born in UK	61%

ENGLAND TOTAL	
Asian or Asian British	50%
White British	47%
Other	2%
Born in UK	63%

YORKS. / HUMBER	
Asian or Asian British	34%
White British	64%
Other	2%
Born in UK	81%

EASTERN	
Asian or Asian British	46%
White British	52%
Other	2%
Born in UK	63%

LONDON	
Asian or Asian British	86%
White British	5%
Other	6%
Born in UK	22%

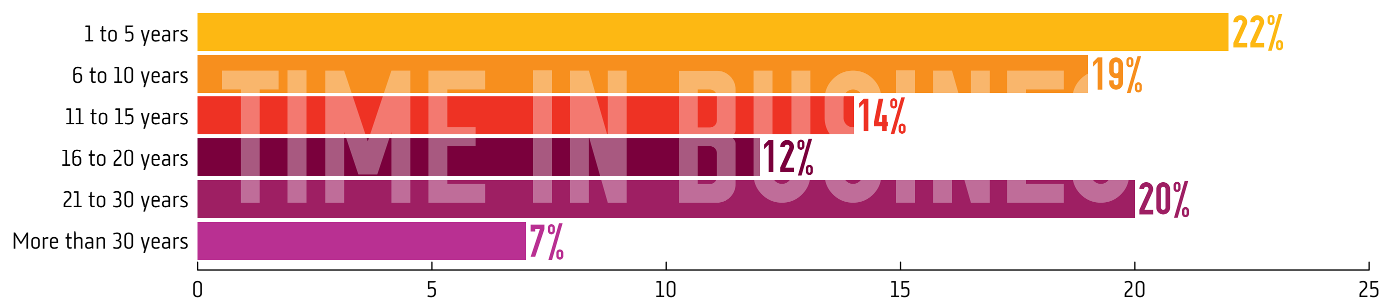
SOUTH EAST	
Asian or Asian British	63%
White British	33%
Other	2%
Born in UK	47%

BUSINESS PROFILE

73% | 27%

First time investor | Inherited family business

TIME IN BUSINESS



All data on this page – source: ACS Survey 2013

CUSTOMERS

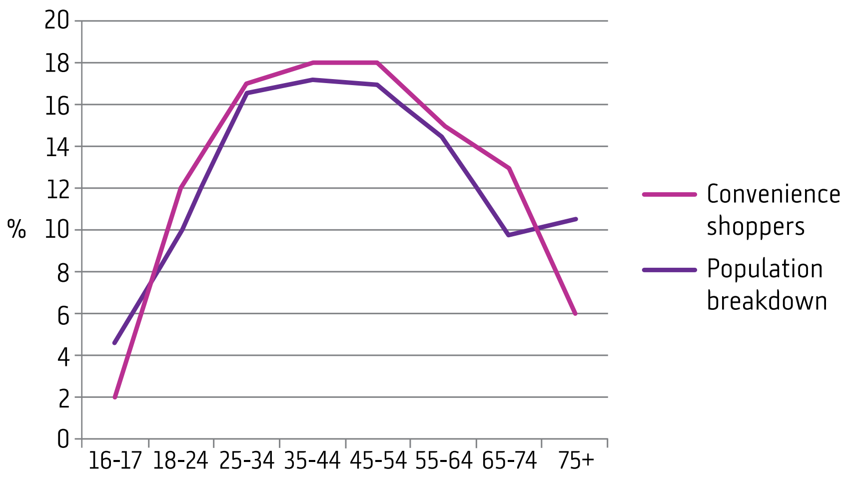
Everyone uses the local shop, the age of customers matches closely to the distribution of ages in the population with a slight bias towards greater use by older customers and women.

Customers are overwhelmingly local with 81% having travelled less than one mile and 57% having walked to the shop. Customers also shop frequently, 86% having visited at least once a week.

CUSTOMER PROFILE

the average spend is £6.04p

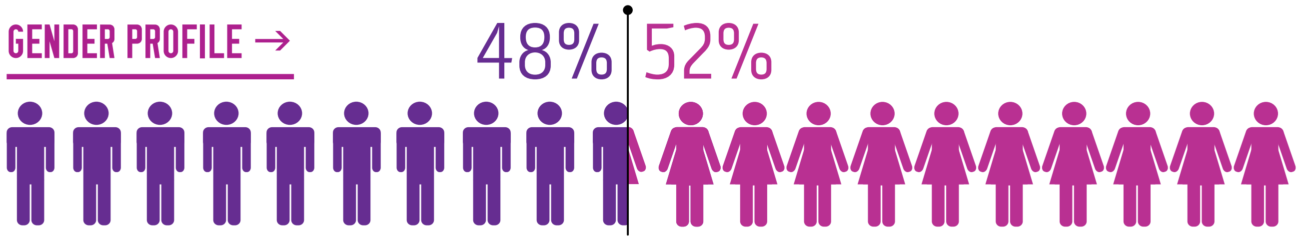
AGE OF SHOPPERS/AGE OF POPULATION →



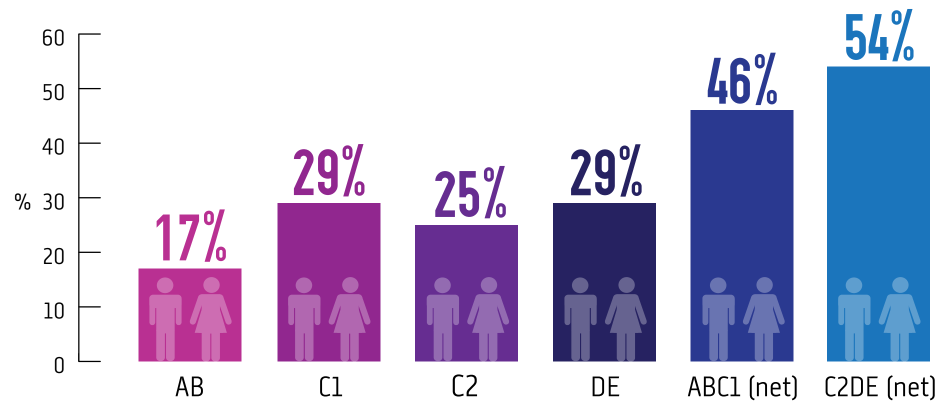
23% live alone

87% of customers pay by cash

GENDER PROFILE →

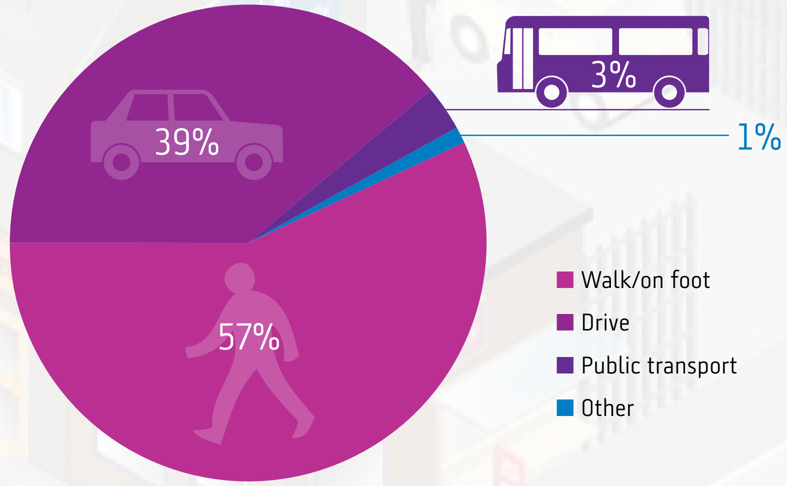


SOCIAL GROUPS →

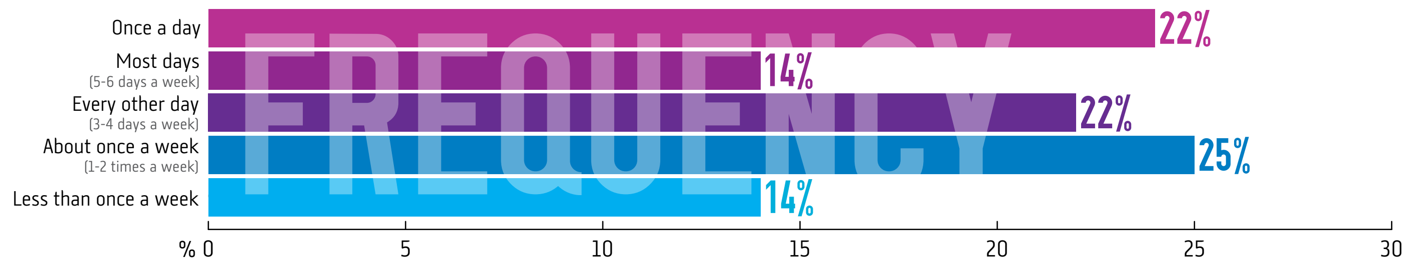


DISTANCE TRAVELLED TO STORE

MODE OF TRAVEL TO STORES



VISIT FREQUENCY



All data on this page – source: him! CTP 2013

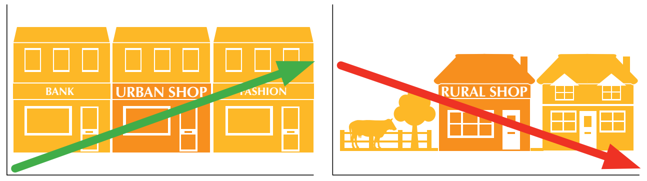
Source: him! CTP 2013

THE FUTURE

SHOPS

Large number of store openings and closures will continue to take place, resulting in stable or slightly increasing numbers of stores overall.

There will be increasing opportunity for new stores in urban and prime locations with potential decline in sub-prime and rural locations.

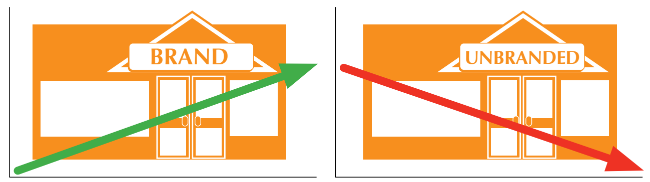


Pressure on space in stores as they seek to accommodate more ranges and services that customers want.

SALES

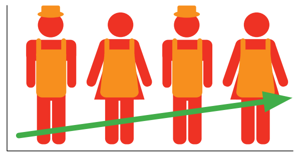
The convenience sector is projected to grow by 5.3% a year over the next five years.

This growth will not be evenly shared. Multiples and groups are likely to expand faster than unaffiliated independents which may even decline.



As competition intensifies more retailers will focus on specialism in certain products (such as green grocery or local produce) or services (such as delivery).

JOBS



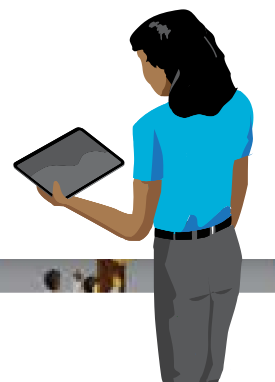
Provision of jobs will grow in line with moderate growth in store numbers.

Staff will be required to develop new skills to meet changing use of stores especially the provision of services.

Local shops will continue to provide flexible employment opportunities for growing numbers of people with lifestyle commitments such as study or care commitments.

ENTREPRENEURS

Retailers will continue to reflect modern Britain, including growing numbers of young people starting businesses and strong representation of ethnic minority communities.



Retailers will have significant access to new technology to help them manage their business, use of this technology will become increasingly mainstream.

There will be a continuing blurring of the lines about what customers use convenience stores for including greater overlap with cafés and takeaways, delicatessens, pharmacies and post offices.

Local shops face increasing expectation that they will play a role in the community over and above their role as a service provider.

CUSTOMERS

Increasing demand for convenience shopping will be fuelled by changing demographics, especially projected growth in single person households.

Increasing use of the internet for shopping will lead to opportunities for convenience in the form of growing click and collect services in particular, especially for non-food ranges not stocked instore. Instore Wi-Fi is less likely to be used in convenience stores.

These pages have been developed by ACS in conjunction with the Oxford Institute of Retail Management, Saïd Business School, University of Oxford. For more details on the sources for the different trends see page 18.

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 2,200 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 Ltd between 28th June and 19th July 2013. 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 to download at www.acs.org.uk/research

2. Multiple Retailer Survey – ACS conducted a survey of its multiple chain members. This survey was based on the questions asked in the independent retailer survey, where relevant, to ensure consistency and accuracy of results. This survey returned results related to a sample of 5,852 stores. A copy of the survey can be found at www.acs.org.uk/research

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

In addition to this new primary data, The Local Shop Report also uses data from several secondary sources. These are:

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.

William Reed Business Media (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 2012 report – Institute of Grocery Distribution
This report is compiled by the IGD based on the sales data up to the end of 2012.

Convenience Tracking Programme – him! Research and Consulting
This programme is a survey of over 20,000 convenience shoppers conducted at the 'moment of truth' instore. References are to the 2013 survey (unless otherwise referenced).

Population data – The Office of National Statistics
Data is taken from Region and Country Profiles – Population and Migration released on 28 October 2011.

References

The Modern Local Shop (page 3) – Percentages for population density sourced from William Reed Business Media. Definitions are based on population density, and are derived from post code data:

- Urban (density above 30 people per sq km).
- Suburban (density 10-30).
- Rural (density 0-10).

Shops (page 6-7)
- Store numbers – Figures sourced from WRBM. These figures were divided by ONS regional population figures to obtain store per population results.
- Store size – Data obtained from ACS independents and multiple surveys. Figures for unaffiliated 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.
- 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. Of those responding a significant proportion (18%) did not answer the question and therefore we cannot provide a definitive view of the split between owned and leased premises in the sector.

Sales (page 8-9)
- Store ownership/share of sales – Figures sourced from the IGD Convenience Retailing 2013 report.
- Sales/market share – Figures sourced from the IGD Convenience Retailing 2013 report.
- Shop categories – Figures sourced from the IGD Convenience Retailing 2012 report.
- Services – ACS Independents and Multiples surveys asked respondents to list which of a selection of services were offered in-store. Results for unaffiliated 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 10-11)
- Jobs – Per store employment figures obtained from ACS Independents and Multiples surveys. Results for unaffiliated 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:

- Non-affiliated independent – 3.73.
- Symbol group independent – 7.65.
- Multiple/co-operative/forecourt multiples/symbol group multiples – 14.78.
- Forecourt independents – 5.69.
- Whole sector average – 7.5.

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

Entrepreneurs (page 12-13)
- All data in this section obtained from ACS Independents survey and reflects statistics for independent retailers only. Results for unaffiliated independents and symbol group members were collated and combined according to their proportion of stores in the market, in order to determine overall results for the sector.
- Ethnicity of owners – Asian or Asian British category combined results received for each of the following categories: Asian or Asian British; Bangladeshi; Pakistani; Indian; and, Any other Asian background.

Customers (page 14-15)
- All data in this section was obtained from him! CTP 2013.

The future (page 16-17)
Sales
- the 5.3% growth projection and the difference in growth projections between multiples, groups and independents is sourced from IGD Convenience Retailing 2013.
- the growing trend towards specialism is sourced from the Oxford Institute of Retail Management (OXIRM) scenario planning project for ACS to be completed in 2014.

Shops
- the commentary on store numbers, location and space in this section is sourced from the OXIRM scenario planning project for ACS to be completed in 2014.

Entrepreneurs
- the trends in diversity of entrepreneurs is based on ACS analysis derived from The Local Shop Report survey work.
- the commentary on greater use of technology in store management is sourced from the OXIRM scenario planning project for ACS to be completed in 2014.

Jobs
- the projection on job creation is based on ACS analysis of trends in store numbers received as part of researching The Local Shop Report.
- the growing need for employee skills is sourced from the OXIRM scenario planning project for ACS to be completed in 2014.
- the trends in employee lifestyles is based on ACS research both for The Local Shop Report and the Voice of Local Shops survey.

Customers
- the information on changing population demographics is sourced from the Office of National Statistics.
- the future intentions of retailers in terms of internet retailing and services is based on research undertaken by ACS in the Voice of Local Shops survey.
- the changing customer expectations point is sourced from the OXIRM scenario planning project for ACS to be completed in 2014.
- the role of local shops as community retailers is sourced from the ACS/OXIRM research into the community role of local shops – see www.acs.org.uk/research

Comparisons 2012/2013 (p19)
Further information on analysis in this chapter as follows:
Shop size: The percentage of retailers (independent and multiple) reporting that their premises was in the 0-999 sq ft band was 53% in 2012 and in 2013 it was 58% (more details page 6).
Fastest growing category: Total value of sales in the fruit and veg category in 2012 was £2bn, in 2013 it was £2.24bn. This is an increase of 12% (this figure is based on an extrapolation taking the total value of sales in the sector as reported on page 8, and the category share data on page 9).
Services: The percentage of independent retailers reporting that they provide home grocery delivery has increased from 16% in 2012 to 27% in 2013.
Length of employment: The proportion of employees who are reported to have worked for their employer for more than 10 years has increased from 20.5% in 2012 to 24% in 2013.
Distance travelled to store: Data from The Local Shop Report 2012 was sourced from the him! CTP report from 2009, at that time the most recent time this question had featured in their research. The 2013 data was collected as part of their research conducted in 2013.

Corrections
The following are corrections from the The Local Shop Report 2012 which were identified post-publication.

Shop numbers: Eastern: 4,251 (one shop per 1,372 people).
South east: 6,224 (one shop per 1,369 people).

Jobs: Eastern: 31,768; south east: 46,510.

Length of employment: More than 10 years: 20.5% (was listed as 2.5%).

COMPARISON 2012/2013

This page shows some of the significant changes between 2012 and 2013 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.

ACS the voice of local shops

STORE NUMBERS

2012 SHOP 49,840

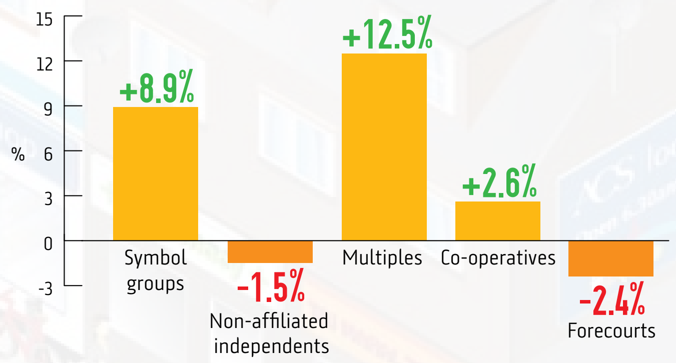
2013 SHOP 49,888 ▲

SHOP SIZE

▲ Stores of sizes 0–999 sq ft represent 5% more of convenience stores

SHOP 0-999 sq ft +5%

SALES



FASTEST GROWING CATEGORY

+12%

▲ **Fruit and veg:**
Sales (by value) of fruit and vegetables grew by 12%

SERVICES

▲ **Grocery delivery:**
11% more retailers offer grocery delivery

+11% ACS home deliveries

FAMILY EMPLOYMENT

▲ **Employ family only:** 27% in 2012, 31% in 2013

▲ **Employ at least one other family member:** 60% in 2012, 64% in 2013

JOBS

2012: 372,465

▲ 2013: 374,944

LENGTH OF EMPLOYMENT

+3.5%

▲ An additional 3.5% of staff have been in post for more than 10 years

STORE OWNERSHIP

+4%

▲ An additional 4% of store owners are women

DISTANCE TRAVELLED TO STORE

Less than one mile away:

2012* 77%

▲ 2013 81%

*Data from The Local Shop Report 2012 taken from him! CTP report 2009

AVERAGE SPEND

2012: £5.63 ▲ 2013: £6.04

VISIT FREQUENCY

At least once a week:

2012 84%

▲ 2013 86%

ACKNOWLEDGEMENTS

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

him! William Reed nielsen IGD Oxford Institute of Retail Management

CONTACT

For more details on this report, contact
Jacqui Gracey at ACS at jacqui.gracey@acs.org.uk

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

ACS the voice of local shops