



The Welsh Local Shop Report 2022

A report by the Association of Convenience Stores

#LSRWales

ACS | the voice of
local shops

Introduction

There are **47,079** convenience stores in mainland UK

2,975 of these stores are in **Wales**

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

There are almost 3,000 convenience stores in Wales, providing essential groceries and services to their customers, employing over 25,000 people with local, flexible jobs, and making a positive difference in their communities. The Welsh Local Shop Report highlights the importance of these stores and acts as a snapshot of the work that retailers and colleagues have done throughout the last year. The information in this report is gathered from our own primary research with independent and symbol group retailers, in addition to multiple and cooperative businesses, and support from respected secondary sources. For more information about the wider UK convenience sector, please see ACS' Local Shop Report 2021 which is available at [ACS.org.uk](https://www.acs.org.uk)

Why we are important

£2.7bn total sales

£619m in GVA

25,000+ jobs

Investment

Over the last year, convenience stores in **Wales** have **invested over £35m** in their businesses

67% of fund investments from **own reserves**



Refrigeration is the most common area of investment (independents only)

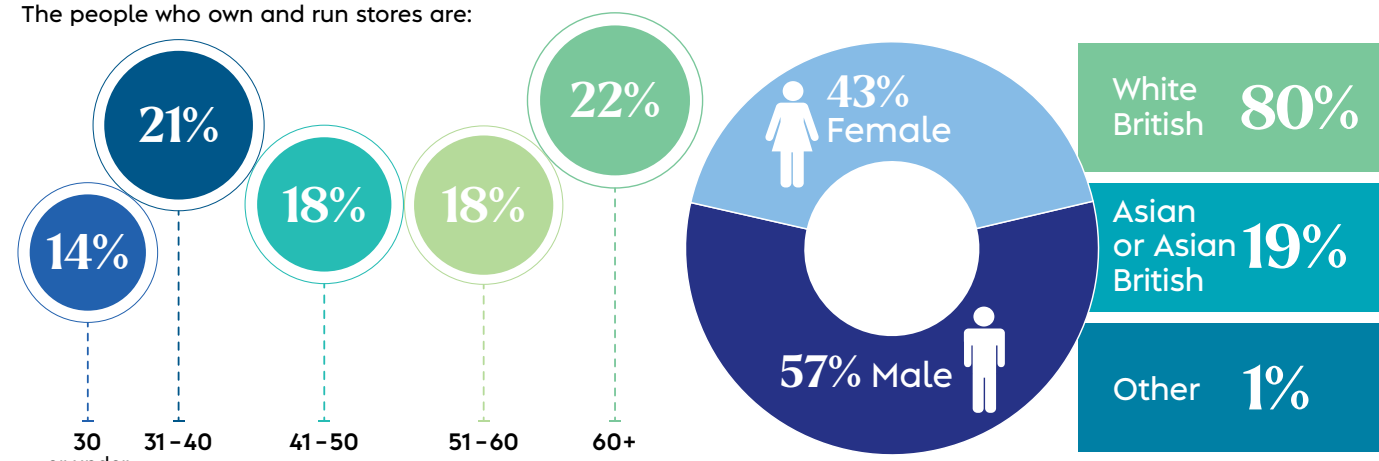
Who we are

ACS | the voice of local shops

88%* of convenience stores in Wales are independently owned

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

The people who own and run stores are:



Source: ACS/Lumina Intelligence 2020

Source: ACS/Lumina Intelligence 2021
* Source: WRBM 2021

Location

63% Rural



22% Suburban



16% Urban



Source: Source: WRBM 2021

Neighbouring businesses

37%

Isolated store

No other retail/service businesses close by.



36%

Located on a small parade

Up to five retail/service businesses close by.



12%

Located on a larger parade or a high street

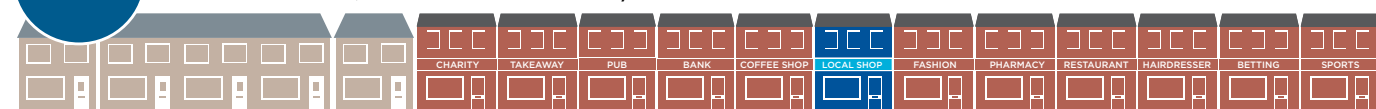
Up to 10 retail/service businesses close by.



15%

Located on a main high street or within a city centre

More than 10 retail/service businesses close by.



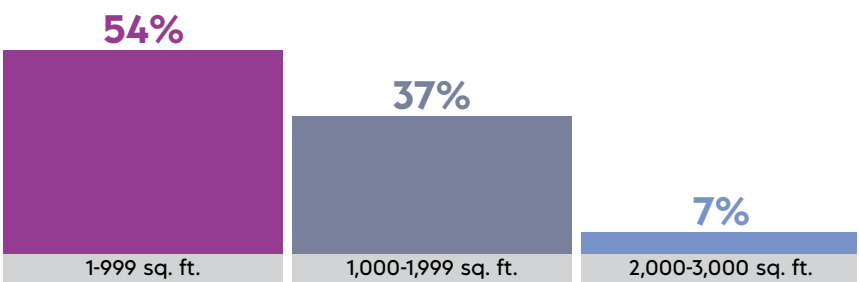
Source: ACS/Lumina Intelligence 2021 (independents only)

3

January 2022

How we operate

Sales space (Independents only)



Average opening hours



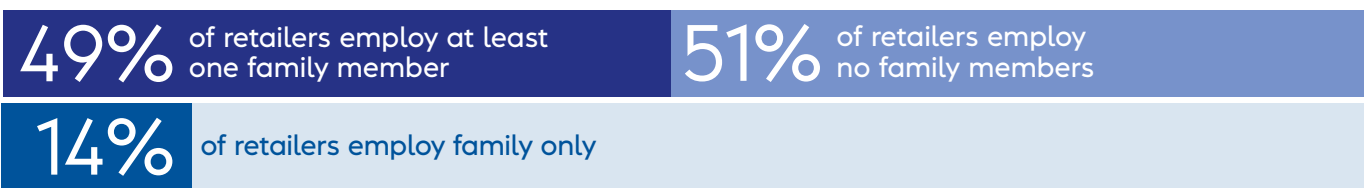
Premises ownership



How independent retailers source their products



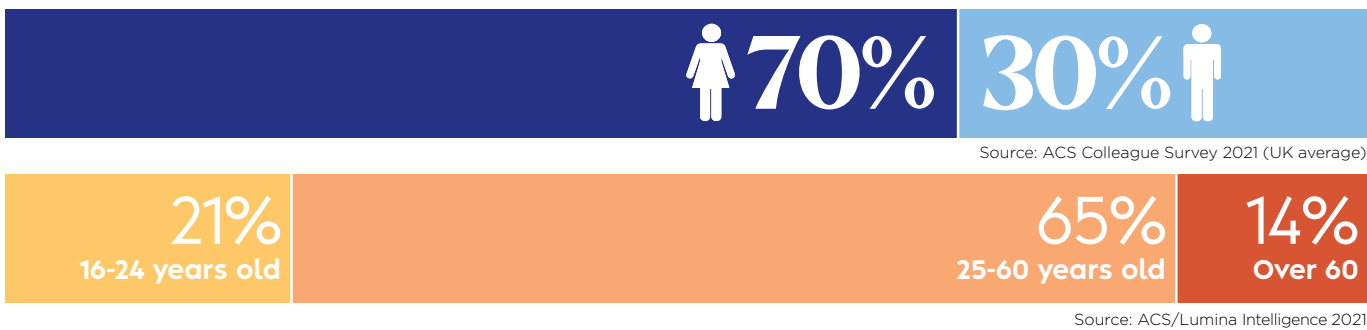
Employment of family members



Our colleagues



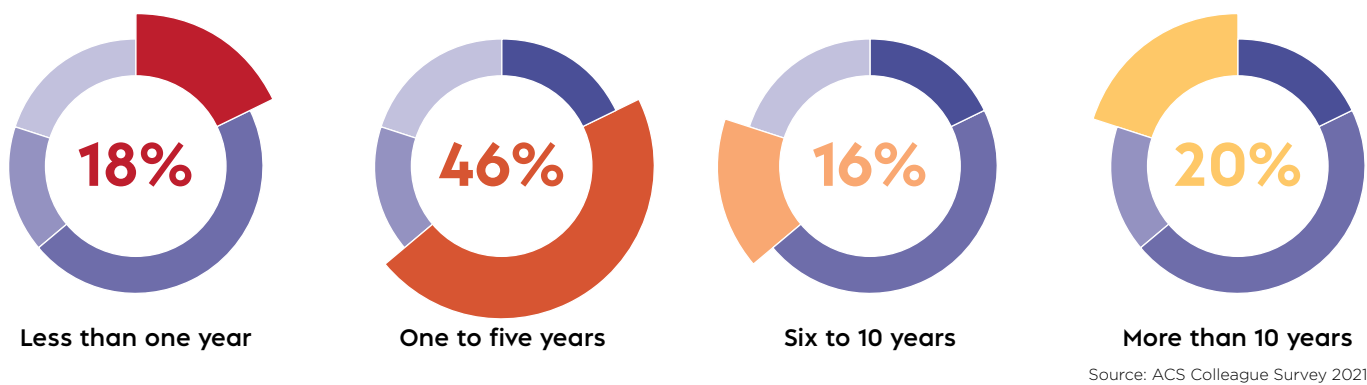
Colleagues in the convenience sector are:



Hours worked



Length of employment

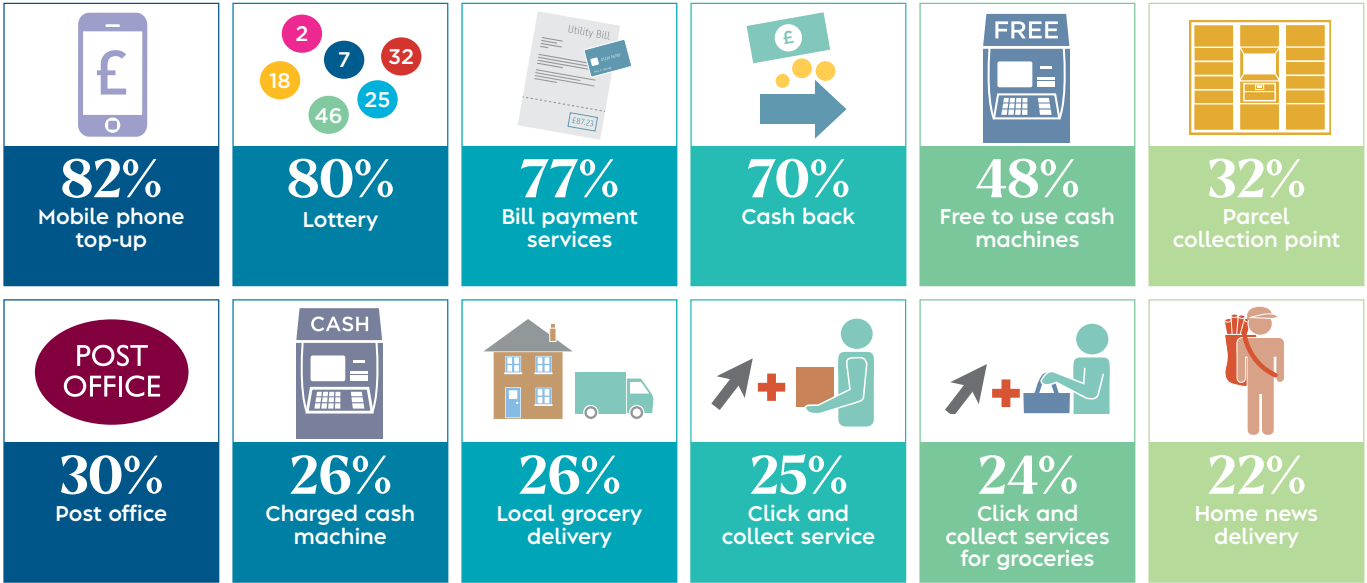


Future plans

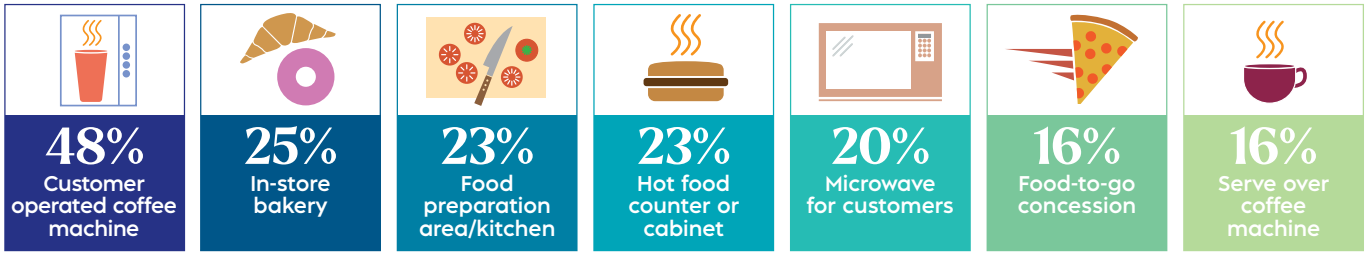


The services and technology we offer

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

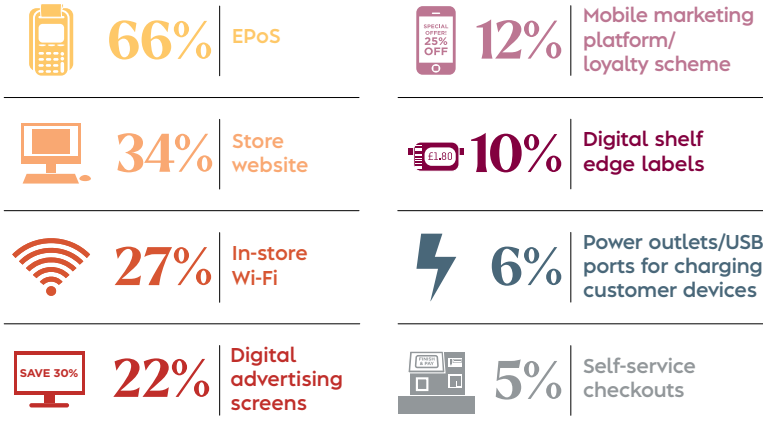


Food service

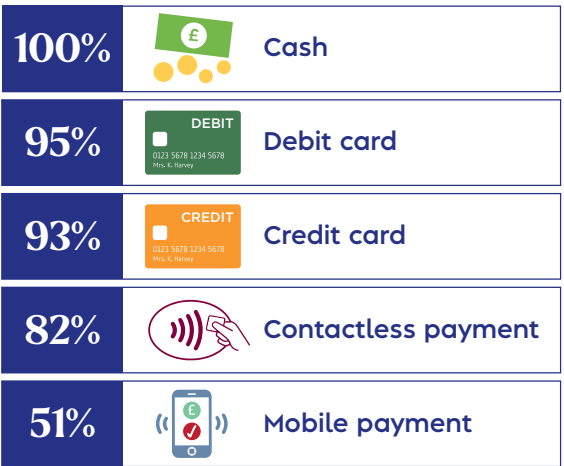


Technology

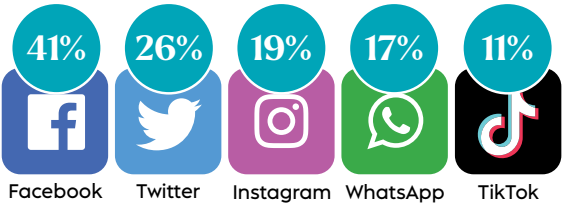
The percentage of stores in the Welsh convenience sector that have each of the following are:



Payment methods



Social media



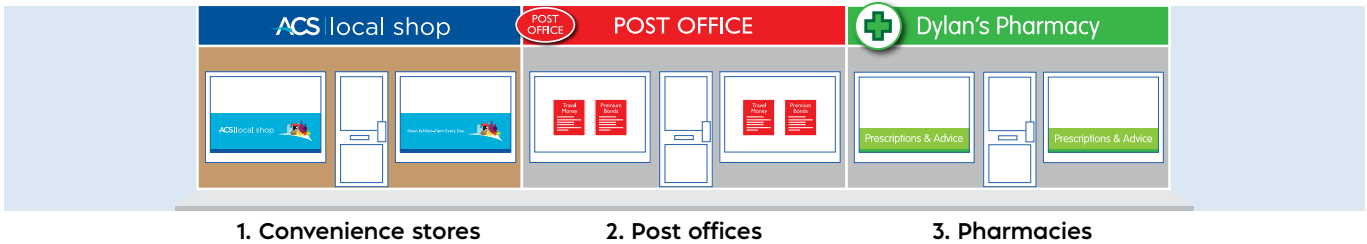
Source: ACS/Lumina Intelligence 2020-2021

Who we serve

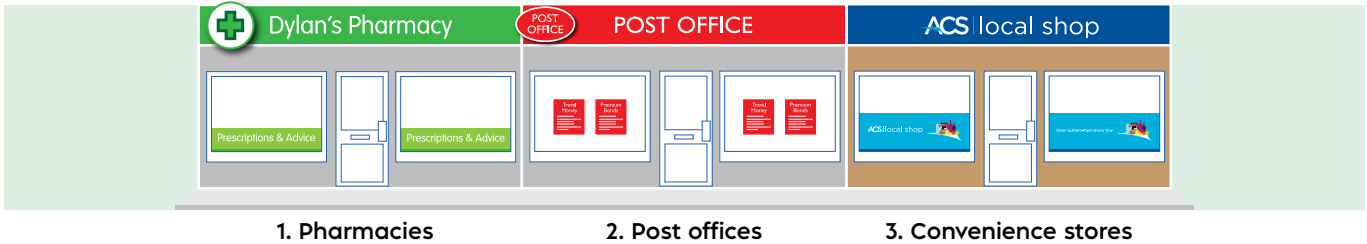
83% of independent retailers in Wales engaged in some form of community activity in the past year



Most positive impact on the local area



Top three most essential services



Source: ACS Community Barometer 2021

Customers

The average customer in Wales visits their local store

2.4 times per week

47% of shoppers in Wales drive to store...

versus **42%** UK average

Average age is: **51**

The average basket size is **3.3** items

The average spend is **£10.91**



Source: Lumina Intelligence CTP 2021

Methodology

ACS Welsh Shop Report draws on data from the ACS Local Shop Report 2021.

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

1. Independent Retailer Survey – A sample of 2,420 independently owned convenience store businesses in the UK. ACS commissioned Lumina Intelligence to aid in the design and delivery of the survey. The survey was carried out over the phone by BCC Marketing between 31st May and 23rd July 2021. 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. The data in the report refers specifically to 186 independent respondents in Wales.

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 6,200 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.

Convenience Tracking Programme 2021 – 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 1,075 UK adults aged 18+, between 25th and 27th June 2021. Respondents were surveyed using a questionnaire designed by ACS.

For more Community Barometer results please visit the ACS website or email rosie.wiggins@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. Welsh data refers specifically to 69 independent retailers in Wales. 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 2,000 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 (February 2021 to November 2021).

ACS Colleague Survey

An online and paper survey with a sample of 7,403 staff working within the convenience sector. The fieldwork was conducted between 4th January to 19th February 2021. The data in this report excludes store managers and refers to a sample of 251 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 rosie.wiggins@acs.org.uk

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:

Lumina
Intelligence

Populus

Retail Economics

William Reed
INFORMING BUSINESS GROWTH

Contacts

For more details on this report, contact
Rosie Wiggins via email at rosie.wiggins@acs.org.uk

For more details on ACS: Visit: www.acs.org.uk Call: 01252 515001
Follow us on Twitter: [@ACS_Localshops](https://twitter.com/ACS_Localshops)

#LSRWales

© ACS 2022. Design & illustration by www.fluiddesignstudio.com

ACS | the voice of
local shops