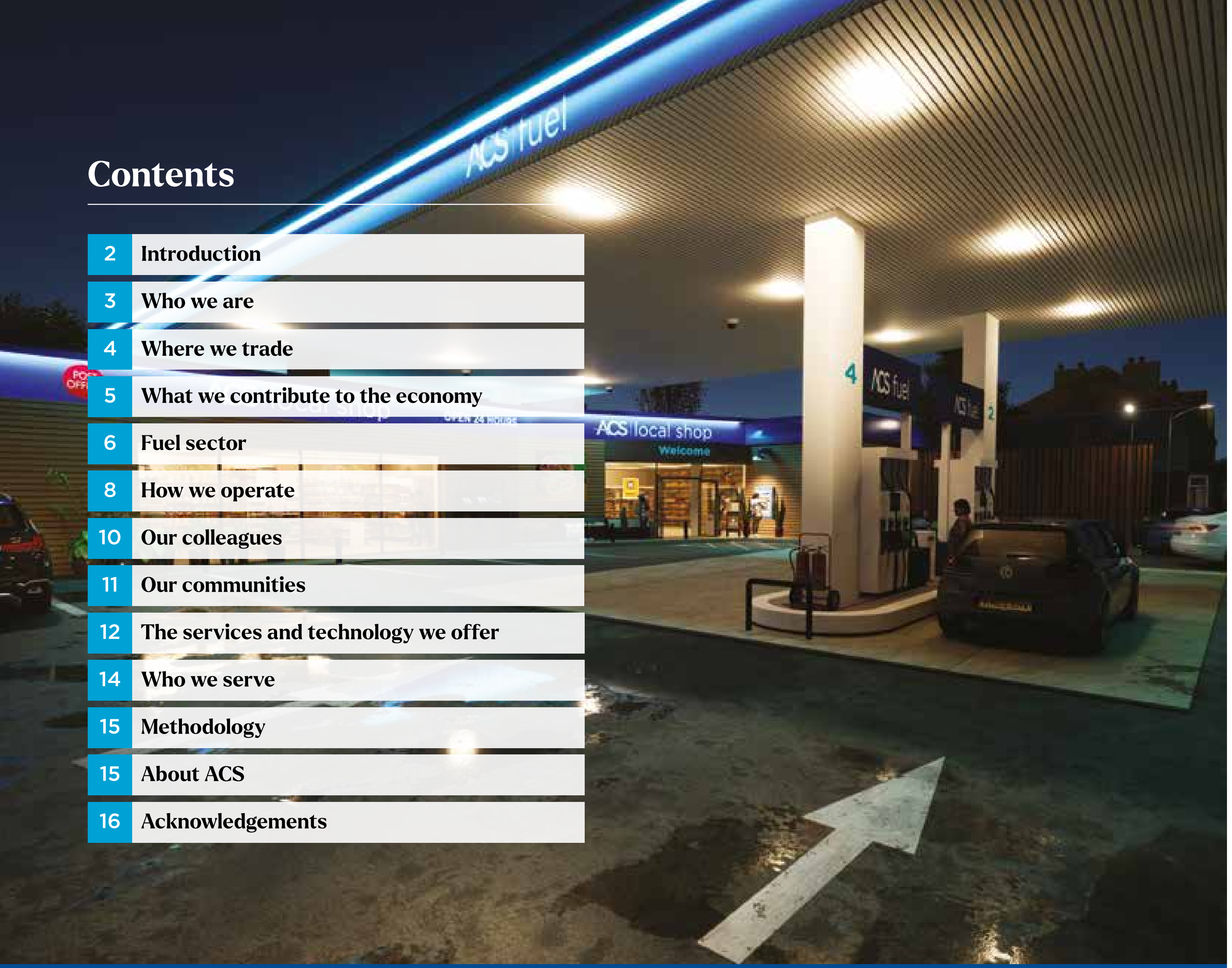
The Forecourt Report 2023

A report by the Association of Convenience Stores

#ForecourtReport

ACS | the voice of local shops



Contents

The importance of forecourt stores

This is the ninth edition of the Forecourt Report, outlining the crucial contribution that the UK's forecourts make to the economy and the communities that they serve. Forecourts are an important part of the wider convenience sector, with thousands of customers seeing forecourts as their main local shop. Forecourts are also innovating with new technology and services, investing in alternative power options for vehicles and continuing to diversify their product mix.

Compared to the rest of the convenience sector, forecourts tend to face much higher running costs, especially on business rates due to the way that forecourts are valued. Despite these challenges, forecourts are committed to investment and improving their offer to customers. Forecourts provide over 89,000 jobs for local people and have invested an average of over £11,700 per store. Forecourt retailers are also active in their communities, with 78% taking part in some form of community engagement, including initiatives like local football club sponsorship, litter picks, and collecting for local food banks.

The information in this report is gathered from our own primary research, using forecourt specific data from the Local Shop Report survey. The report also draws on data that has been kindly provided by Experian Catalist, Portland Fuel, Zap-Map, Lumina Intelligence, Nielsen, Yonder and William Reed. Detailed information about the methodology and calculations in the report can be found on page 15.

Who we are

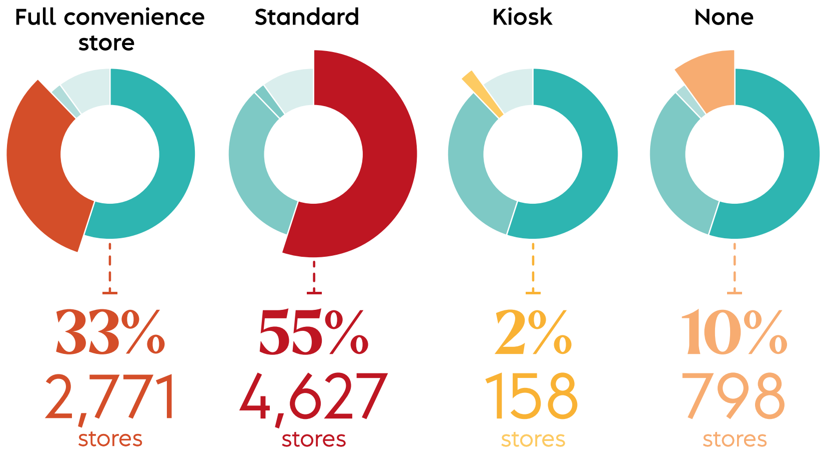
ACS the voice of local shops

There are **8,354** fuel forecourt sites in the UK

7,398 have shops

Source: Experian's V2 2023 database release, August 2023

Store types



Source: Experian's V2 2023 database release, August 2023

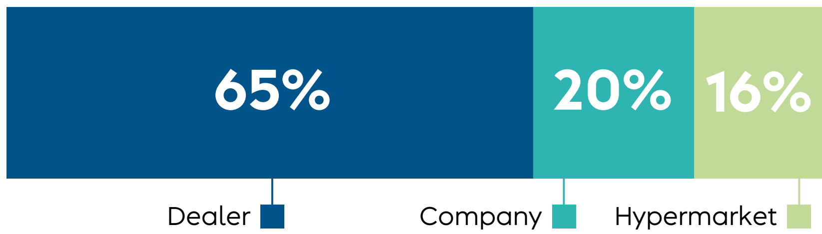
Full convenience store
Likely to be a modern branded shop development offering a wide range of convenience shopping for the motorist on the move. Often has dedicated shop parking.

Standard
Traditional forecourt shop building, selling newspapers, cigarettes, confectionery, oil, plus some food, pre-packed sandwiches, snacks and drink items.

Kiosk
May sell a small amount of oil, cigarettes and confectionery.

None
No operating shop. Unmanned locations and some sites where payment is made in other premises e.g. a car dealership.

Forecourt shop ownership



Source: Experian's V2 2023 database release, August 2023

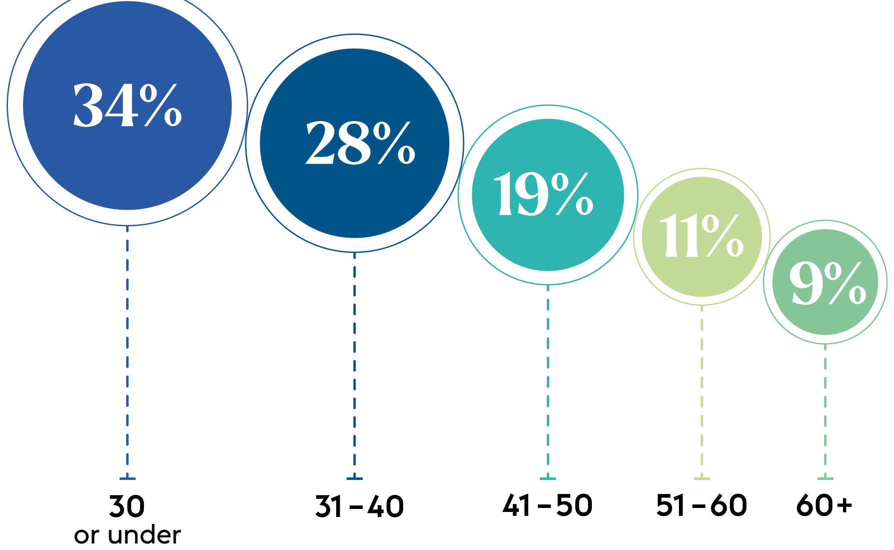
Dealer
An independently owned site usually supplied under an agreement with an oil company whose name usually appears on the brand sign. Also includes unbranded sites with no oil company identification.

Company
Owned by the supplying oil company whose name appears on the brand sign.

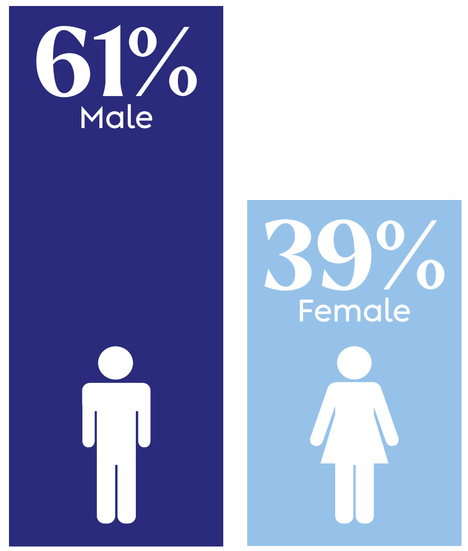
Hypermarket
Owned and operated by the multiple retailers (hypermarket groups). Also includes sites that may be away from the main hypermarket store but are owned and branded by the hypermarket; and includes Co-op stores with Co-op branded forecourts.

Entrepreneurs

The people who own and run stores are:



Source: ACS / Lumina Intelligence 2023 (independents only)



Source: ACS / Lumina Intelligence 2023 (independents only)

Where we trade

There are **7,398** forecourts with shops in the UK

Source: Experian's V2 2023 database release, August 2023

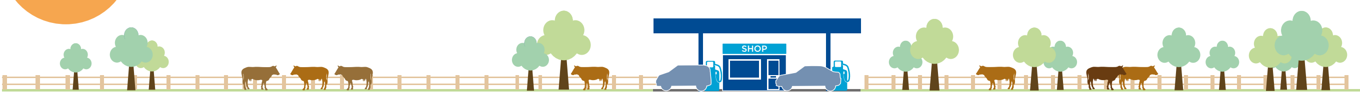
Locations

Urban transient	2,986 stores	40%
Residential	2,057 stores	28%
Rural	1,245 stores	17%
Commercial/industrial	982 stores	13%
Motorway	128 stores	2%

Source: Experian's V2 2023 database release, August 2023

Neighbouring businesses

37% No other retail/service businesses close by



30% Up to five retail/service businesses close by

9% Up to 10 retail/service businesses close by

23% More than 10 retail/service businesses close by

Source: ACS / Lumina Intelligence 2021 (with shops; independents only)

What we contribute to the economy

The total value of **forecourt sales £4.9bn**

Source: Experian's V2 2023 database release, August 2023

Top 10 forecourt sales categories (multiples only)

1	£849m	Tobacco & vaping
2	£482m	Soft drinks
3	£282m	Beers, wines & spirits
4	£242m	Non-food
5	£218m	Confectionery
6	£167m	Convenience & deli of which £76m is sandwiches
7	£110m	Crisps, snacks, nuts & seeds
8	£69m	Health, beauty, toiletries & baby
9	£56m	Dairy of which £31m is fresh milk
10	£32m	Household & pet

Source: NielsenIQ Scantrack 2023. Data reflects multiple forecourt retailers only

Investment

Over the last year independent forecourts have invested **£11,708** per store » **45%** funded by own reserves

Source: ACS Investment Tracker / Voice of Local Shops polling 2022-2023

Top ten areas of investment (of those investing)

- Shelving 35%
- Till system (e.g. EPoS) 31%
- Refrigeration 30%
- In-store lighting 21%
- Store signage 20%
- Air-conditioning 17%
- Technology 16%
- Freezer space 15%
- Internal building maintenance 14%
- Improving store access 12%
- Crime prevention measures 11%

Source: ACS Investment Tracker / Voice of Local Shops polling 2022-2023

Vehicle fuel and power

There are around:

530,000
PHEVs in the UK

856,000
fully electric vehicles
registered in the UK

In the UK overall there are:

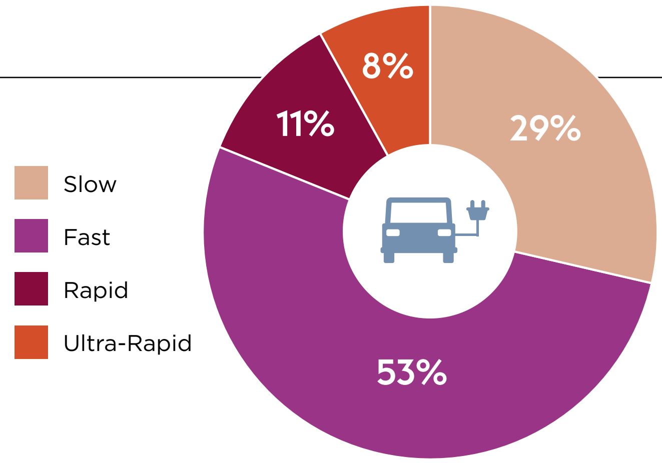
48,450 electric charging points at **29,062** locations

In the last 12 months, over

8,600 **charge points** were added to the UK network

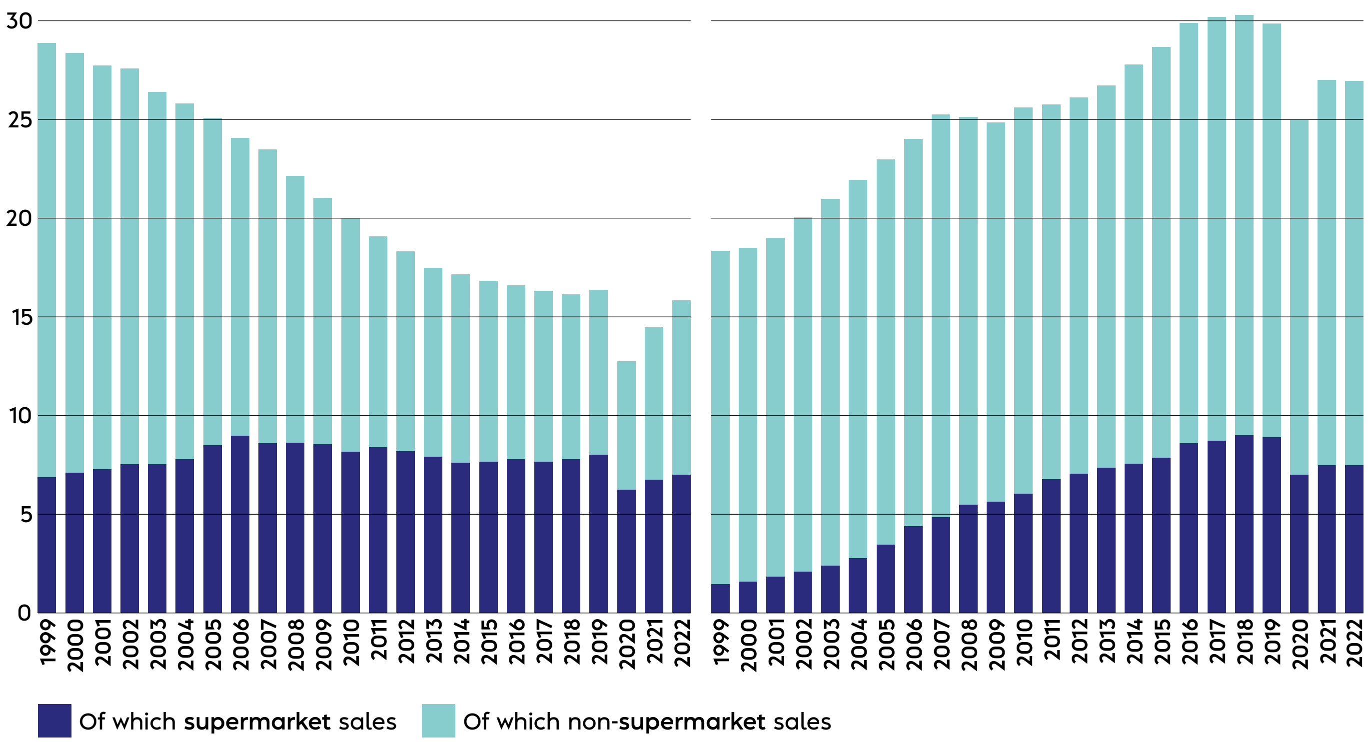
Source: Zap-Map, August 2023

UK charging points by type



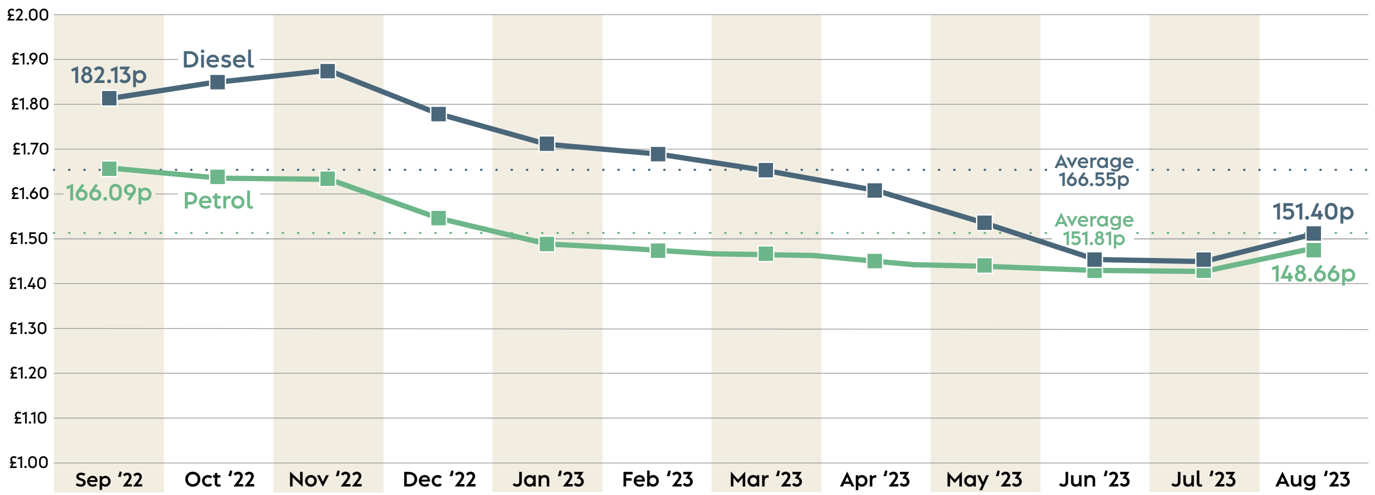
Source: Zap-Map, August 2023

Fuel sales (billions of litres)

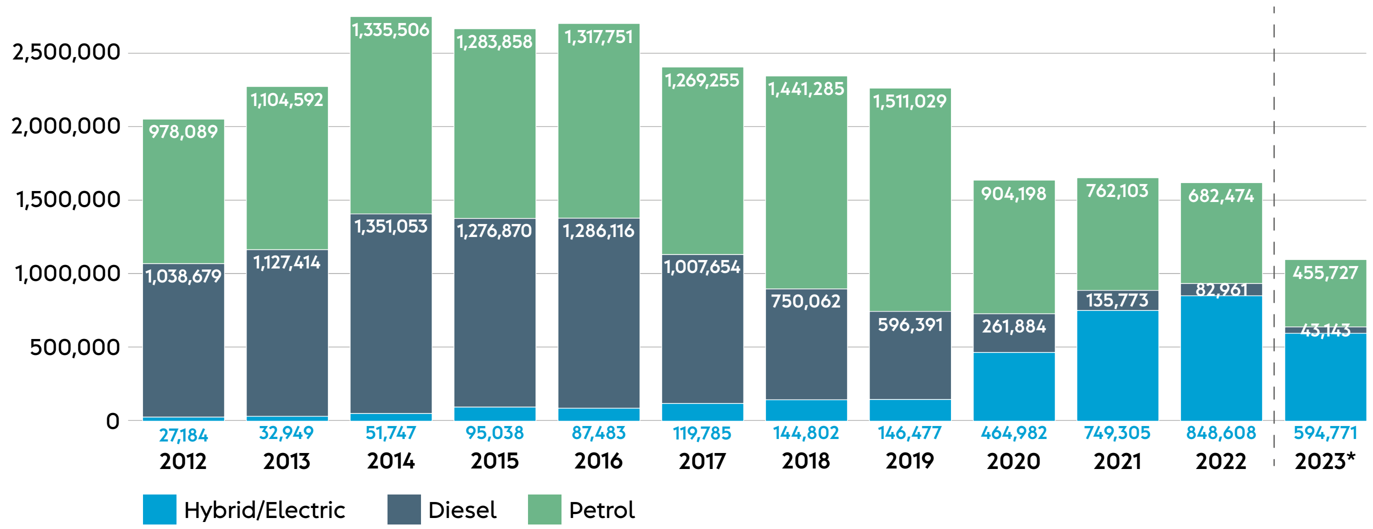


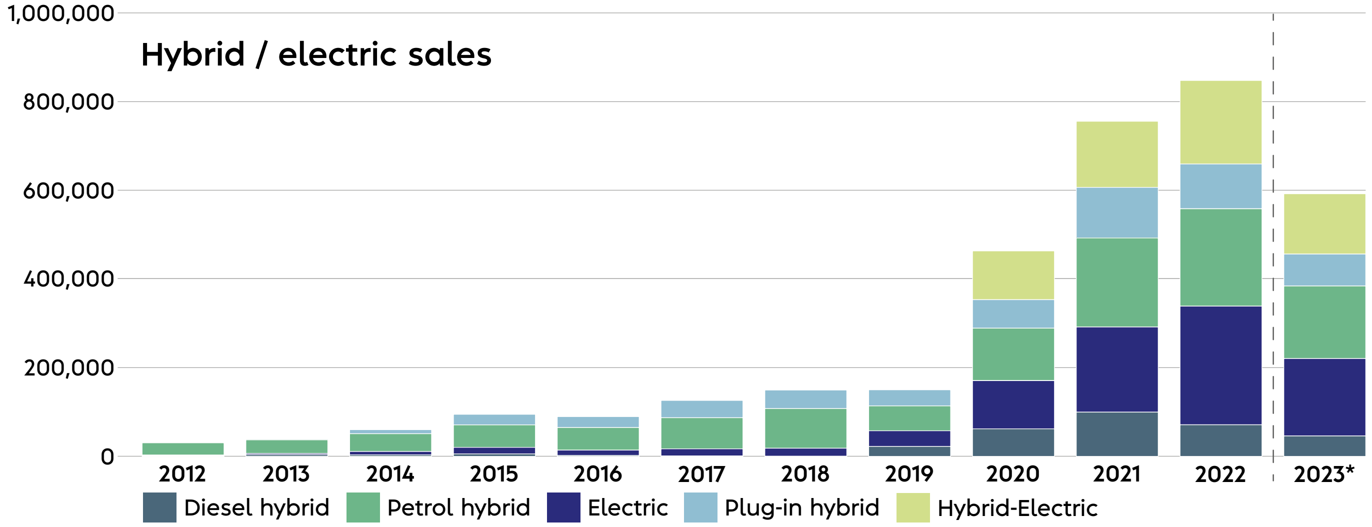
Source: Portland Fuel 2023

Fuel pricing trends (monthly average)



New car registrations by fuel type





*All years are full calendar year, except 2023 which is January to July inclusive

Source: All data on this spread Portland Fuel 2023

How we operate

ACS the voice of local shops

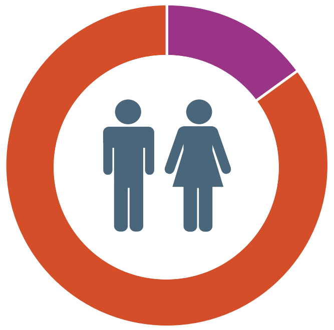
79% of independents operate **one store**

Working hours

2% of forecourt retailers work more than **70 hours** per week

21% take **no holiday** per year

Business origin



15% inherited family business

85% started business

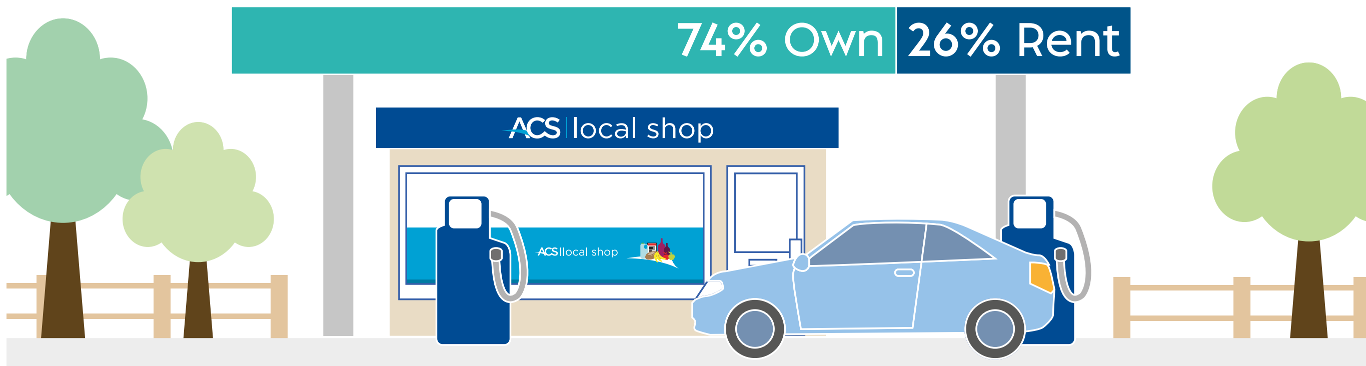
Employment of family members

20% of retailers employ at least one family member

80% of retailers employ no family members

Premises ownership (independents only)

74% Own | 26% Rent



Sales space*

42%	46%	12%
1-999 sq. ft.	1,000-1,999 sq. ft.	2,000-3,000 sq. ft.

Opening hours

Open 24 hours

38% of **independent** forecourts

89% of **multiple** forecourts

Average opening hours

15.03 Monday to Saturday

14.26 Sunday

Online and social media presence

Facebook	X (Twitter)	Instagram	WhatsApp	TikTok
62%	36%	33%	15%	14%

Accessibility

69%	56%	51%	12%
Wheelchair access	Wide aisles	Parking	Hearing aid loops

Energy saving

51%	51%	26%	7%
Chiller doors	LED lighting	Smart meter	Solar panels

Our colleagues

The forecourt sector in mainland UK provides over **89,000 jobs**

Source: ACS/Lumina Intelligence 2022

Colleagues in the forecourt sector are:

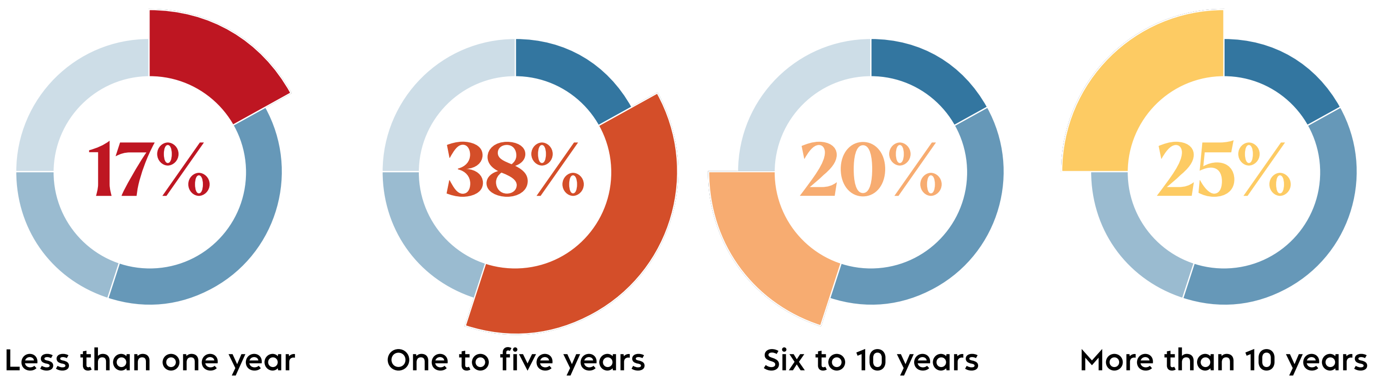
Source: ACS Colleague Survey 2023 (overall convenience sector)

Source: ACS/Lumina Intelligence 2023

Hours worked

Source: ACS Colleague Survey 2023 (overall convenience sector)

Length of employment

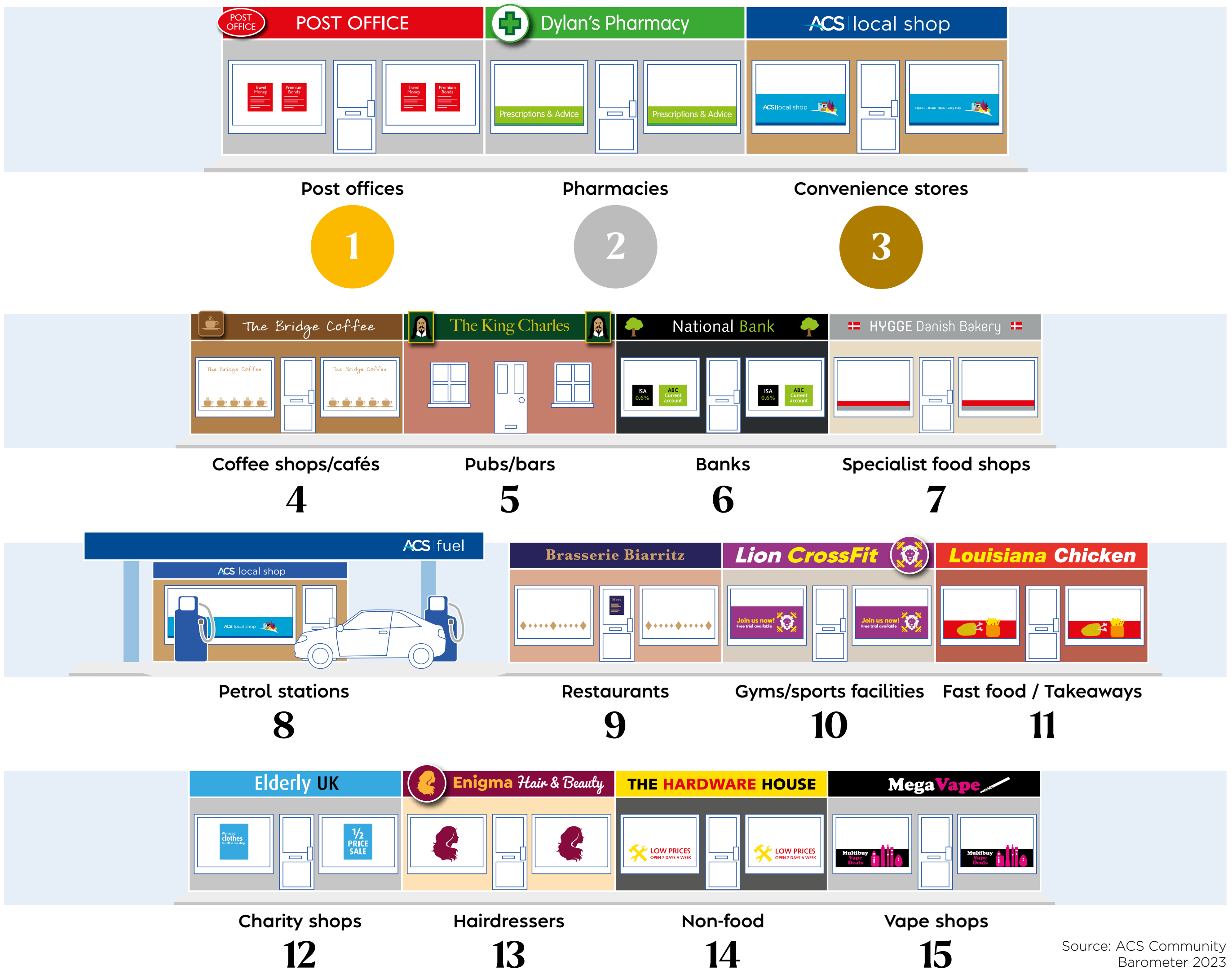


Source: ACS Colleague Survey 2023 (overall convenience sector)

Our communities

ACS the voice of local shops

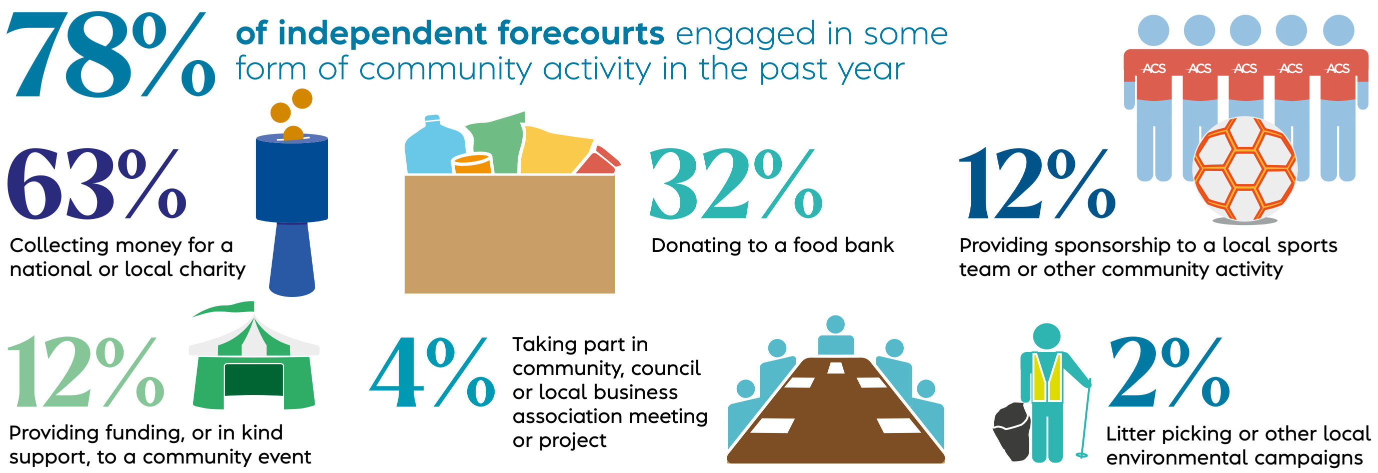
Most positive impact on the local area



Source: ACS Community Barometer 2023

Community activity

78% **of independent forecourts** engaged in some form of community activity in the past year



63% Collecting money for a national or local charity

32% Donating to a food bank

12% Providing sponsorship to a local sports team or other community activity

12% Providing funding, or in kind support, to a community event

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

2% Litter picking or other local environmental campaigns

Source: ACS Voice of Local Shops polling 2022-2023

The services and technology we offer

The percentage of forecourts that provide each service is as follows:

- 73% Bill payment services
- 71% Lottery
- 66% Mobile phone top-up
- 51% Cash back
- 47% Wood/domestic burning fuel
- Car wash: 46% Car wash (overall). Of which: 35% Automatic machine car wash; 52% Jet wash (manual); 15% Hand car wash (attended)
- Cash machine: 39% Free to use cash machine; 18% Charged cash machine
- 36% Customer toilets
- 31% Click and collect services
- 31% Community noticeboard
- 28% Plants/horticulture products
- 26% Parcel collection point
- 23% Food bank collection
- 22% Local grocery delivery
- 15% Click and collect services for groceries
- 14% Post office
- 14% Recycling bins
- 11% Home news delivery
- 10% Indoor seating area
- 2% Photo booth
- 2% Prescription collections
- 1% Key cutting services

Food service

- 71% Customer operated coffee machine
- 37% Food preparation area/kitchen
- 27% In-store bakery
- 25% Hot food counter or cabinet
- 20% Food-to-go concession
- 18% Microwave for customers
- 15% Serve over coffee machine

Source: ACS/Lumina Intelligence/Experian 2022-2023

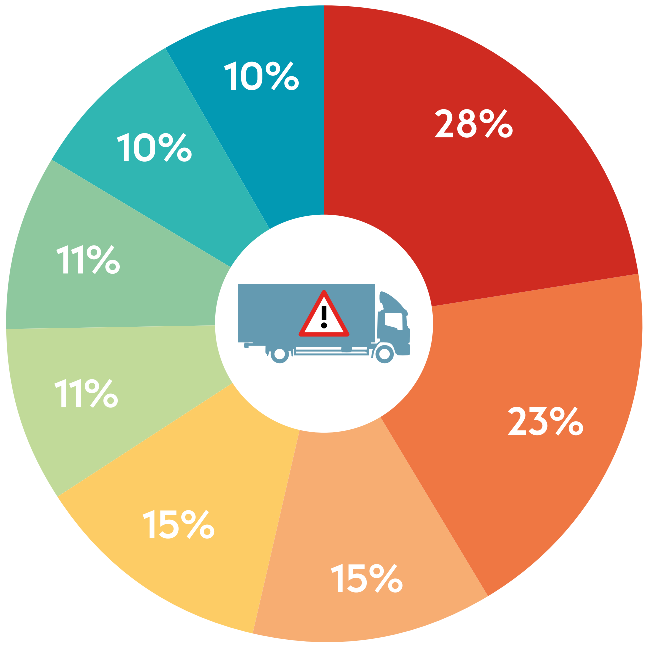
The percentage of forecourts that have each of the following is:

- 69% EPoS
- 57% Store website
- 43% In-store Wi-Fi
- 31% Digital advertising screens
- 20% Mobile marketing platform/ loyalty scheme
- 12% Electronic shelf edge labels
- 10% Self-service checkouts
- 7% Power outlets/USB ports for charging customer devices

Source: ACS/Lumina Intelligence/Experian 2022-2023

Shop product sourcing issues

60% of retailers experienced issues affecting the supply of products for their business



- Late deliveries
- Incomplete deliveries
- Availability at cash & carry
- Increased costs of deliveries
- Cancelled deliveries
- Shorter shelf life on fresh products
- Purchase restrictions at cash & carry
- Restrictions on orders

Source: Voice of Local Shops polling May 2023 (excludes fuel supply)

Payment methods

99%	Cash
99%	Debit card
99%	Credit card
97%	Contactless and mobile payment
46%	Card not present transactions

Source: ACS/Lumina Intelligence 2023

Forecourt services

19%	Pay at pump
10%	LPG (liquid petroleum gas)
8%	Electric vehicle charging point
8%	Red diesel
7%*	Ad Blue (pumped)

Source: ACS/Lumina Intelligence/Experian 2022-2023
*Source: Experian's V2 2023 database release, August 2023

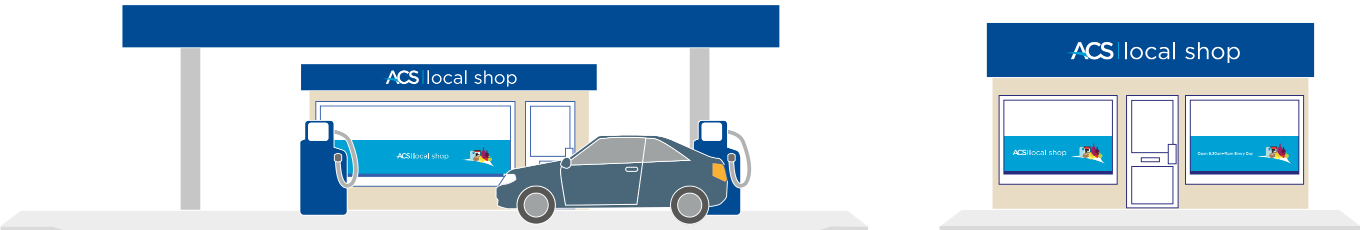
Who we serve

Forecourt customers are:

57% 43%

Source: Lumina Intelligence CTP 2023

Customers travel to store



The average distance travelled to store is: Forecourt shopper **3.28** miles Standalone convenience shopper **1.59** miles

Source: ACS Community Barometer 2023 / Lumina CTP 2022

63% of forecourt shoppers **drive to store** versus 37% for standalone convenience shoppers

Source: Lumina Intelligence CTP 2023

How often customers visit

Every day Mon 1 Tue 2 Wed 3 Thu 4 Fri 5 Sat 6 Sun 7 — 19%

Most days (5-6 times a week) Mon 1 Tue 2 Wed 3 Thu 4 Fri 5 Sat 6 Sun 7 — 19%

Every other day (3-4 times a week) Mon 1 Tue 2 Wed 3 Thu 4 Fri 5 Sat 6 Sun 7 — 12%

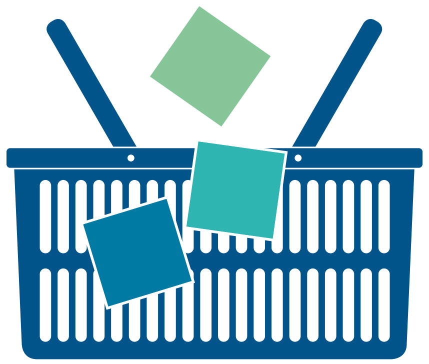
About once a week (1-2 times a week) Mon 1 Tue 2 Wed 3 Thu 4 Fri 5 Sat 6 Sun 7 — 25%

Less than once a week Mon 1 Tue 2 Wed 3 Thu 4 Fri 5 Sat 6 Sun 7 — 24%

The average customer visits their **local** store **3.6** times per week

Source: Lumina Intelligence CTP 2023

Purchases



The average basket size is **3.0** items

The average spend is **£11.38** excluding fuel

Source: Lumina Intelligence CTP 2023

Methodology

ACS the voice of local shops

Primary data for The Forecourt Report was undertaken by ACS in the form of two surveys:

1. **Independent Forecourt Survey** – A sub-sample of the Local Shop Report dataset, specifically the 200 independent retailers which are fuel forecourts (both symbol group and unaffiliated forecourt independents). The Local Shop Report includes a sample of 2,124 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 between 12th June and 14th July 2023. 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 Forecourt Survey** – ACS conducted an online/paper survey of its multiple forecourt members. This survey was based on the questions asked in the Independent Forecourt Survey, where relevant, to ensure consistency.

ACS Voice of Local Shops survey

ACS conducts quarterly surveys of 100 independent forecourt retailers, to establish the amount retailers have invested over the past quarter, what they have invested in and how they have funded their investments. The survey also looks at the community activity undertaken by independent retailers. The data included in the report is an average of the latest four quarters (November 2022– May 2023). Data in the report refers to independent forecourt retailers only.

Market Summary Report 2022 – Experian

Experian surveyors visit 4,500 forecourts spread over each 12-month period – circa 50% of the UK forecourt network each year. Experian surveyors are typically ex-oil company or ex-forecourt shop suppliers and are very familiar with the forecourt sector. During a visit, surveyors update data and take photos of the forecourt sites. The number of forecourt sites in the UK includes forecourts in Northern Ireland. Where specified within the report the data refers to forecourts specifically with a shop located on site.

Portland Fuel

Portland Analytics' price assessments reflect trading transactions conducted in North West European wholesale markets. This is further supplemented through analysis of a wide range of historical customer, supplier and government data sources.

Zap-Map

Data correct as of September 2023. For more information about the data please visit: https://www.zap-map.com

Sales Category data 2023 – Nielsen

The data included in the report refers to sales for multiple forecourt retailers only. Category definitions are revised throughout the year to align with retailers and therefore categories may not be directly comparable with previous forecourt reports. For more information please visit: https://www.nielsen.com/uk/en.html

Convenience Tracking Programme 2023 – Lumina Intelligence

This programme is a survey of over 20,000 convenience shoppers conducted at the 'moment of truth' in-store. 'Forecourt shoppers' refers to customers shopping specifically at forecourt stores rather than standalone convenience stores.

Community Barometer

Populus surveyed a nationally representative online sample of 1,000 UK adults aged 18+, in June 2023. 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

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

About ACS

The Association of Convenience Stores is a trade association representing local shops across the UK.

We represent our members through effective lobbying, industry leading advice and networking opportunities for retailers and suppliers.

Our membership includes a diverse range of convenience store retailers, from stand-alone family run independent stores to symbol groups and multiple convenience stores. These retailers operate in neighbourhoods, villages, on petrol forecourts and in city centres.

ACS' core purpose is to lobby Government on the issues that make a difference to local shops.

We represent the interests of retailers on a range of issues, including business rates, energy, regulation, planning, alcohol and many more.

ACS produces several reports throughout the year, looking in detail at different aspects of the convenience store sector, all of which are available free to members.

We can also provide further breakdowns of The Forecourt Report data to members. Please contact Rosie Wiggins at rosie.wiggins@acs.org.uk for further details.

For more information about ACS, visit our website.

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.

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