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ACS | the voice of  
local shops

James Lowman  
Association of Convenience Stores

Where will the recovery take place?

Association of Convenience Stores Limited  
Federation House, 17 Farnborough Street  
Farnborough, Hampshire GU14 8AG

01252 515001  
01252 515002

## Agenda

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- ACS
- Current trends
- Policy context
- Responses

## About ACS

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- Formed in 1995
- 33,500 shops in Membership
- Buying Groups, Symbol Groups, Multiples Convenience Stores, Independents
- Premier Club of Suppliers
- Lobby group for sector
  - Members of UGAL for EU lobbying
- Providing advice for Members
- Offering networking opportunities
- Website: ACS.org.uk

## 33,500 Members

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## Agenda

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## Stuttering Recovery

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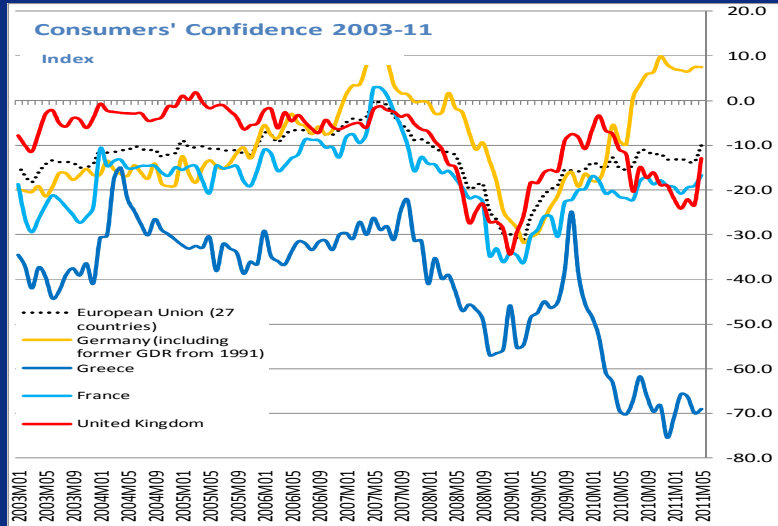


The ONS has cut its forecast for UK economic growth from **0.2 per cent** to **0.1 per cent** for the second quarter of 2011.

The ONS has also revised down its final estimate for first quarter growth in the year from **0.5 per cent** to **0.4 per cent**.

## Consumers Still Negative

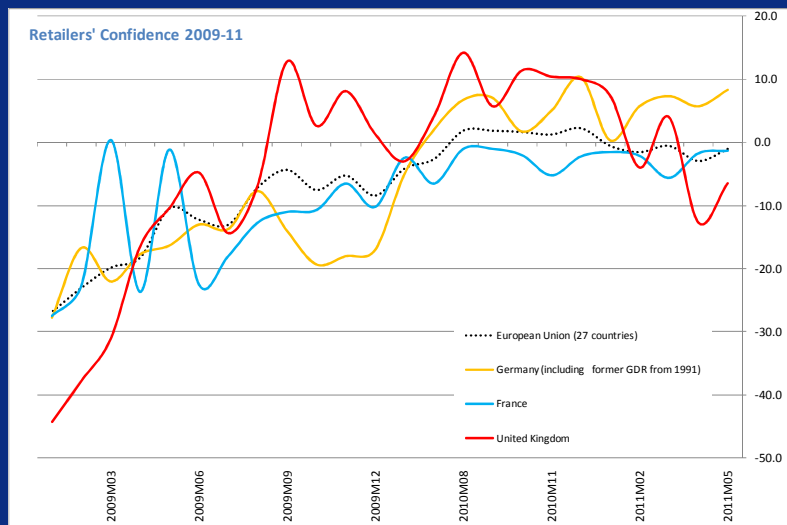
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Source: Eurostat (2011)

## Retailer Confidence Reflects Consumers

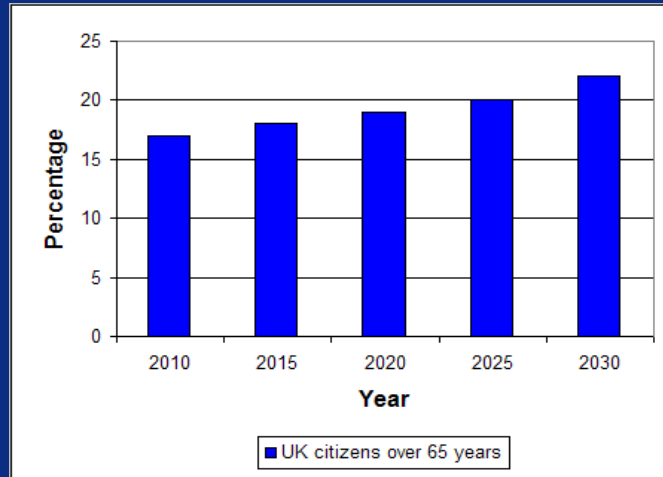
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Source: Eurostat (2011)

## Ageing Population

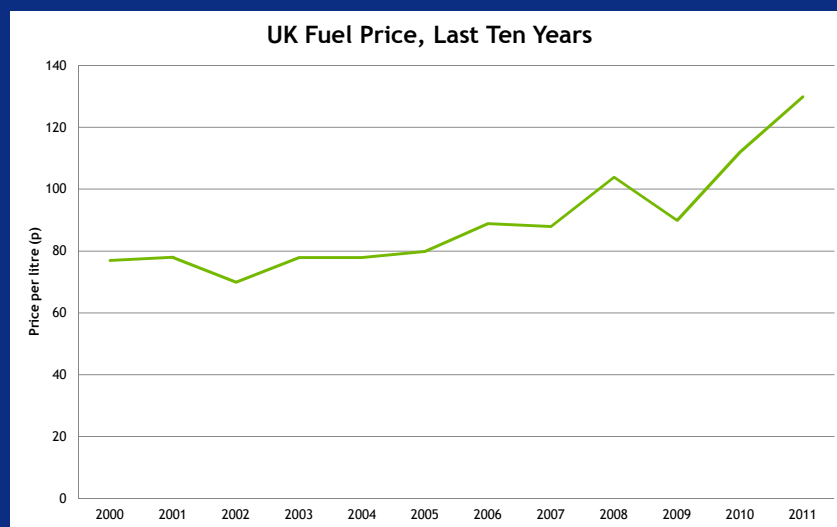
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Source: United Nations forecasts

## Higher Fuel Prices Mean More Local Shopping

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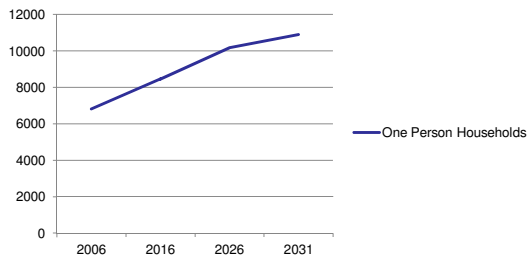


Source: Speedlimit.org.uk

# Rise in Single Person Households

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**Predicted Figures for One Person Households in the Next 20 Years**



Currently, single person households make up 30% of the property market

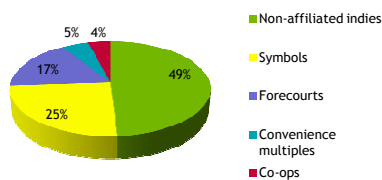
In the next 20 years, the Government anticipates levels of single person households to rise considerably

Source: ONS

# Market Growth

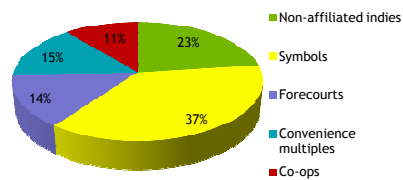
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**2006**



2006: £24.6 billion

**2010**



2010: £30.9 billion

Source: IGD Convenience Retailing Report

## Growth of internet shopping

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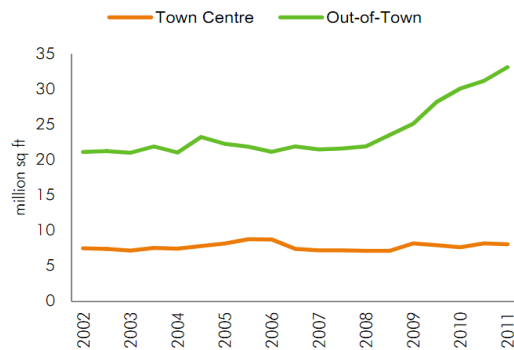
UK shoppers spent a total of **£58.8bn** online in 2010, 18% more than in 2009.

Spending is expected to increase at the same pace this year, to a total of **£69bn**.

## Accelerating growth of out of town stores

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### Total Pipeline (H1 & H2): Town-Centre and Out-of-Town



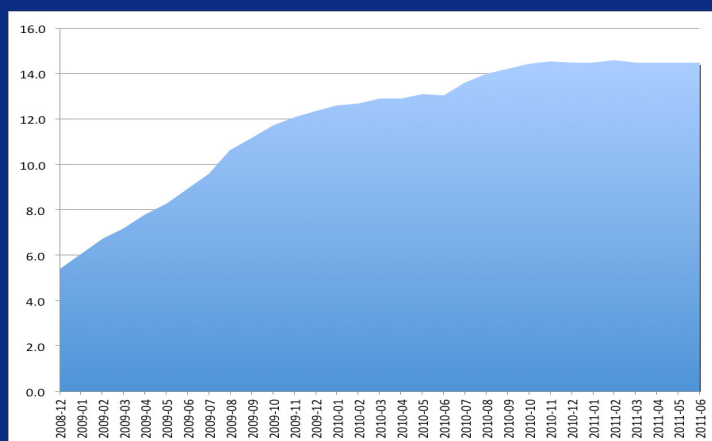
Source: CB Richard Ellis, PMA

There is currently **41m sq ft** of development at pipeline stage, **81%** of which is out of town

## Shop Vacancy rates

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Over the last three years, the UK shop vacancy rate has tripled to 14.5%



Source: Local Data Company

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## The Battle for the High Street

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Source: Local Data Company

## National Planning Policy Framework

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**Town Centre  
First**

**Sustainable  
Development**

## National Planning Policy Framework

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### Local Plans

- How many in place?
- Transitional arrangements
- Who will draw them up?

## National Planning Policy Framework

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- Sequential test
- Impact test
- Independent evidence
- Diversity

## Mary Portas Review

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### Discreet Pro-High Street Measures

- Town Centre Management
- Mentoring
- Marketing



## Mary Portas Review

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### High Street



vs



### Out of Town

- Planning
- Rates
- Parking

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## Responses by Communities

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- Conversion of retail to housing
- Downsizing town centres
- Can this ever be reversed?

## Responses by Convenience Stores

[ACS.org.uk](https://www.acs.org.uk)

- Investment in service offer
- Increasingly local offer
- Community engagement
- Civic leadership

[ACS.org.uk](https://www.acs.org.uk)

Thank you

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