



Department
of Energy &
Climate Change

DECC Non - domestic building energy use project phase I

Annex 3: Profile of Independents and Small Chains

June 2013

Profile of Independents and Small Chains

Floor areas for different activity sectors in the food and mixed retail sector are shown in the table below:

Table 1: Profile of Independent /Small Chain Food/ Mixed Retailers - Gross and Net Floor Area m² (Independents and Small Chains – Fewer than 100 outlets: N=24,807, n=862)

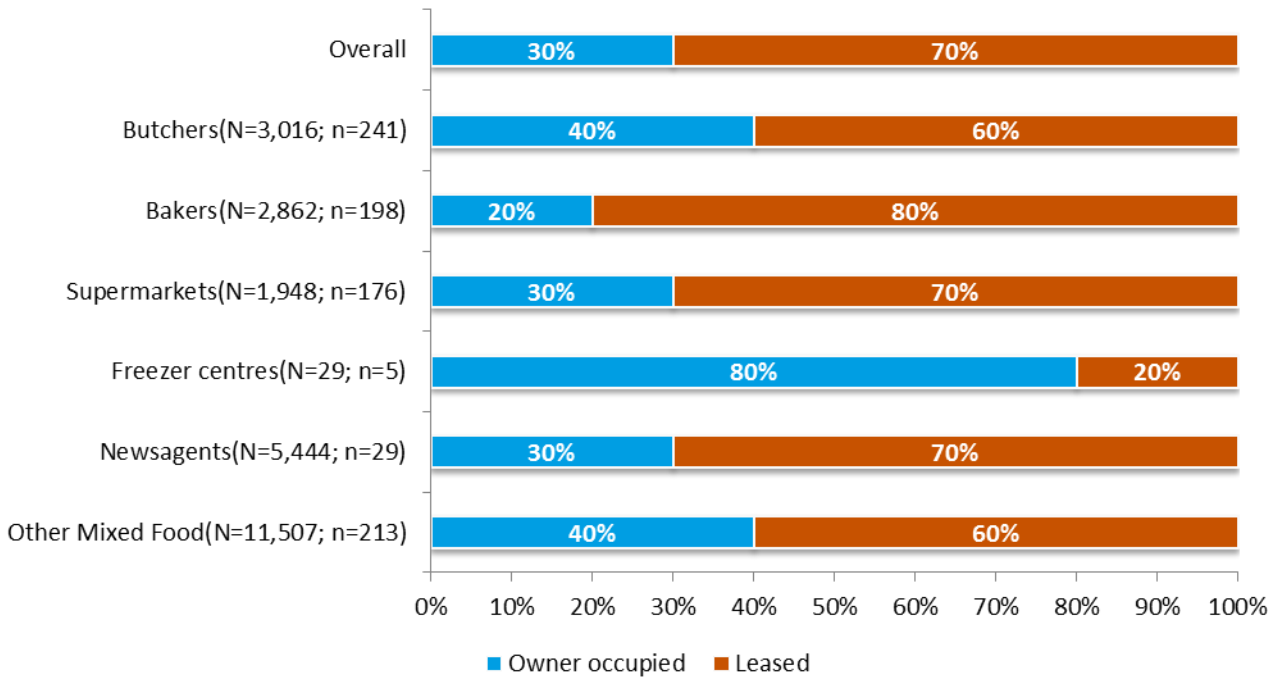
Activity sector	n	N	Gross floor area of premises (m ²)			Net retail floor space (m ²)		
			Total [95% confidence interval] ¹	Mean	Median	Total [95% confidence interval]	Mean	Median
Butchers	241	3,016	558,600 [488,672-628,528]	185	140	553,933 [485,381-622,485]	184	140
Bakers	198	2,862	610,183 [536,329-684,036]	213	140	607,587 [533,811-681,362]	212	140
Supermarkets	176	1,948	455,602 [402,570-508,635]	234	149	453,791 [400,807-506,775]	233	141
Freezer centres	5	29	15,381 [10,791-	525	465	15,373 [10,787-	525	465

¹ The confidence intervals calculated are an estimate considering the design effect of weighting the dataset. Calculations have included cases for which energy use was imputed; however given the large number of sites able to provide floor area, exclusion of imputed cases does not greatly affect confidence intervals. Due to the small sample size the lower bound for independent freezer centres was negative. Therefore, the unweighted floor areas were used in combination with the lower bounds for multi-site freezer centres to estimate the overall lower bound.

Activity sector	n	N	Gross floor area of premises (m ²)			Net retail floor space (m ²)		
			30,640]			30,646]		
			Total [95% confidence interval]	Mean	Median	Total [95% confidence interval]	Mean	Median
Newsagents	29	5,444	750,551 [719,637-781,465]	138	130	734,187 [703,063-765,311]	135	120
Other mixed food retail	213	11,507	1,967,173 [1,823,107-2,111,238]	171	93	1,955,008 [1,810,810-2,099,206]	170	93
Total	862	24,807	4,357,489 [3,981,204-4,744,542]	176	119	4,319,878 [3,944,758-4,705,784]	174	111

Approximately 75% of the total gross floor space occupied by independent and small chain food mixed retailers is owned/leased by independents. Seven out of ten of all premises occupied by independent and small chain food and mixed retailers are leased (70%) – a leasing to ownership ratio of 2.33:1. However the proportion which owned their premises compared to lease did differ significantly by sector whereby butchers (40%) and other mixed food retail (40%) were more likely to own their premises compared to bakers (20%), as illustrated in the chart overleaf.

Figure 1: Ownership vs Leasing Split by Activity Sector (independents and small chains – fewer than 100 outlets: N=24,807, n=862)



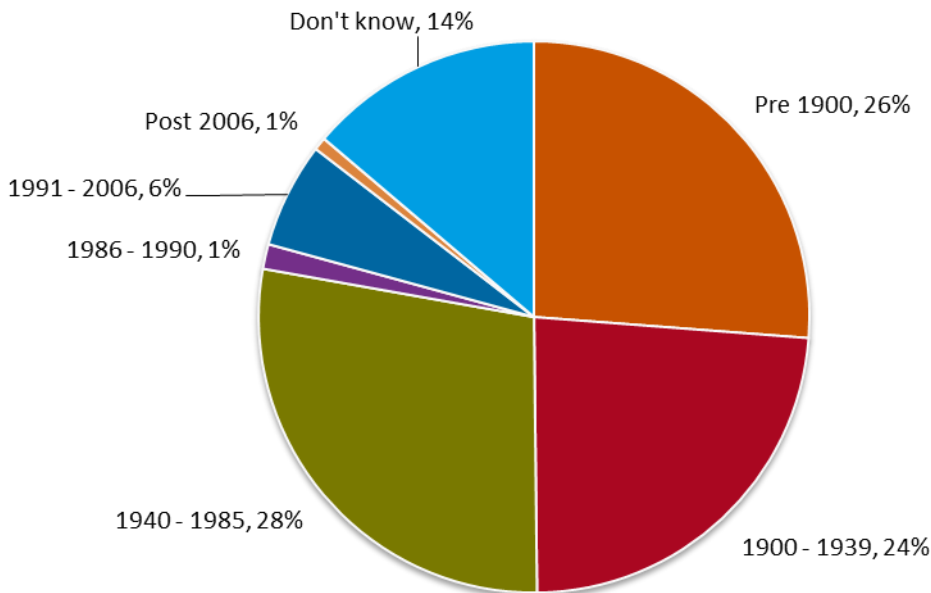
Where premises were leased rather than owned, the average length of the lease was 10 years, though the length of lease was less for butchers (7 years) and supermarkets (8 years).

Table 2: Average Length of Lease where Leased (years) for Independents and Small Chains (fewer than 100 outlets)

Activity sector	Average length of lease (years)
Butchers	7
Bakers	10
Supermarkets	8
Freezer centres	2
Newsagents	10
Other mixed food retail	10
Total	10

Just over a quarter of all food/mixed retail premises operated by independents/small chains date back to pre-1900 (26%), with 50% of all premises having been constructed before 1940, as illustrated in Figure 2 below:

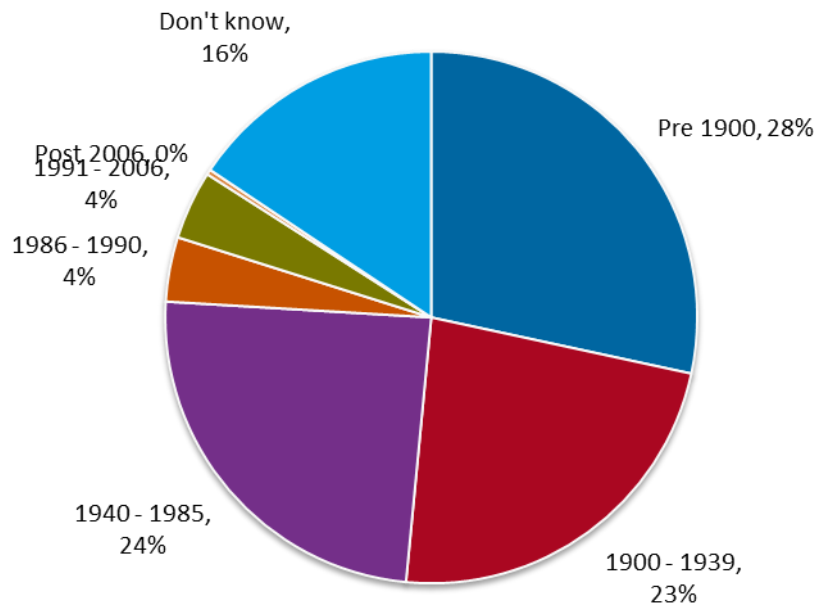
Figure 2: Age of Premises (independents and small chains – fewer than 100 outlets: N=24,807, n=862)



The overall profile of premises by year of construction is similar across all sectors. However, one difference is that a greater proportion of butchers (35%) and other food/mixed retail (28%) occupy shops built pre-1900 compared to bakers (23%), newsagents and supermarkets (both 21%).

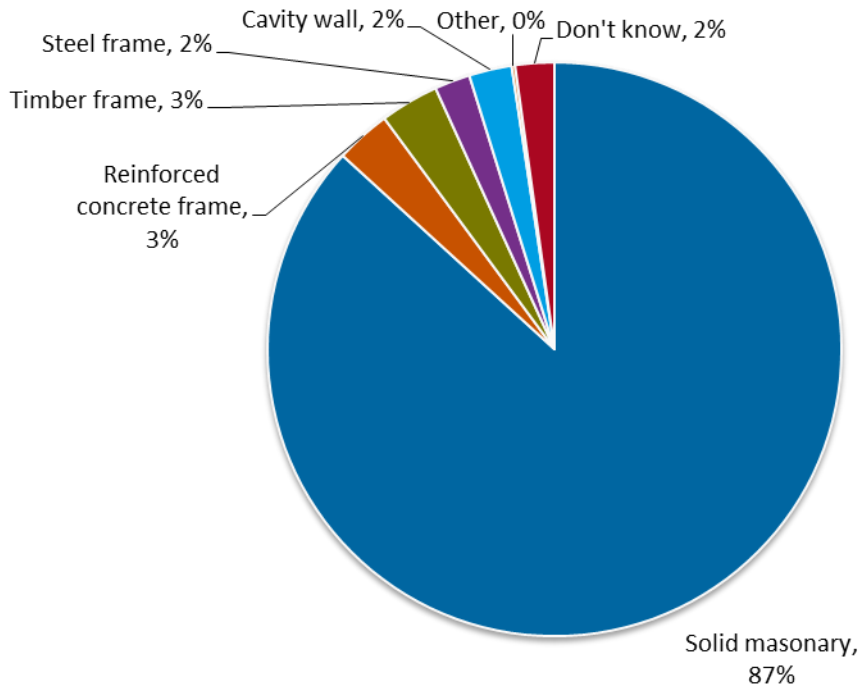
The proportion of total floor space that relates to buildings constructed before 1940 (51%) is similar than the proportion of premises constructed before 1940 (50%), as illustrated in Figure 3 below:

**Figure 3: % of Gross Floor Area by Age of Building Construction
(independents and small chains – fewer than 100 outlets: N=24,807, n=862)**



According to the responses received from respondents, almost nine out of every ten premises (87%) are solid masonry buildings:

Figure 4: Building Construction Type (independents and small chains – fewer than 100 outlets: N=24,807, n=862)



The reported profile of building construction was similar across all activity sectors covered in the survey.

© Crown copyright 2013
Department of Energy & Climate Change
3 Whitehall Place
London SW1A 2AW
www.gov.uk/decc

URN 13D/142c