

# Community Barometer 2023

New insight into the provision of shops and other local commercial services, their role in benefitting the community, and how people feel about them.

A report by the Association of Convenience Stores



# About the Report

The Community Barometer report is put together from the findings of an Omnibus poll of 1000 UK consumers about their local area\*, conducted by Yonder Consulting in June 2023. The polling asks the following key questions of consumers:

- Which of the following types of services do you think are the **most essential** for the communities in your local area?
- Which of the following types of services do you believe have the **most positive impact** on your local area?
- For each of the following types of services, please indicate whether you think that it would be beneficial for your local area to have **more or less** of these types of services, or if you think the number should remain the same.
- If you were in charge of a fund which you could invest in either your **local town/city centre, or your immediate neighbourhood**, which would you choose to invest in?
- Which of the following elements would you choose to invest in?
- Which best describes your relationship with the people running and working in your local shop?

*\*In the polling, we define the 'local area' as the area within 15 minutes walk of a respondents' home.*

# About the Report

As part of the Community Barometer report, we ask consumers about how they feel about 16 different local services:



Convenience stores



Pharmacies



Post Offices



Specialist Food Shops



Banks



Pubs / Bars



Coffee Shops



Restaurants



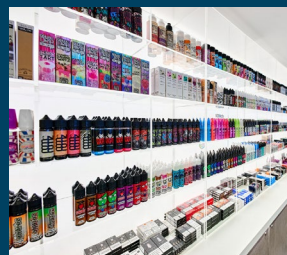
Non-Food Shops



Petrol Stations



Fast Food Shops



Vape Shops



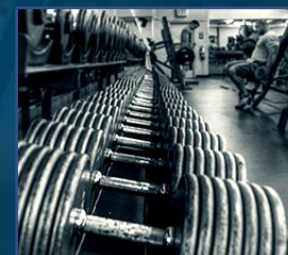
Charity Shops



Pawnbrokers



Hairdressers



Gym or Sports Facilities

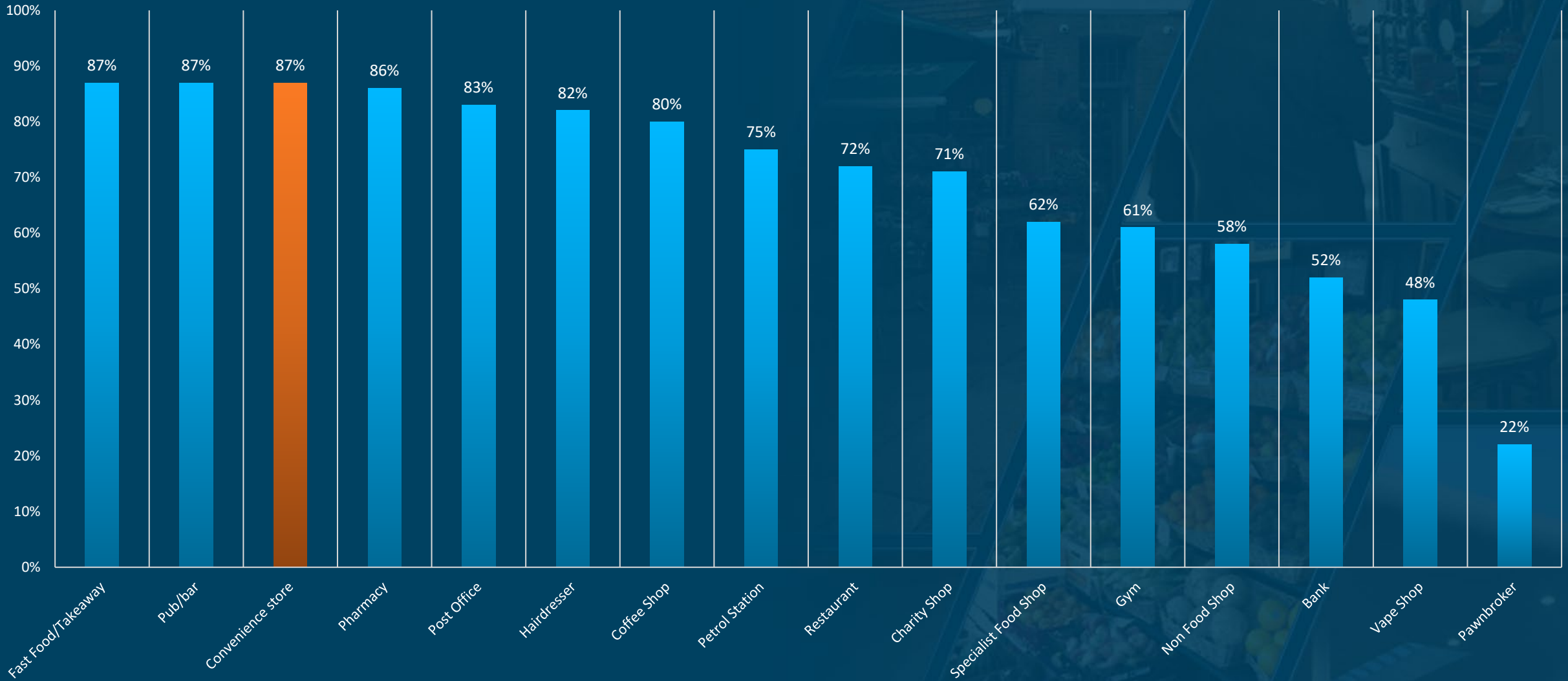
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# Provision And Impact



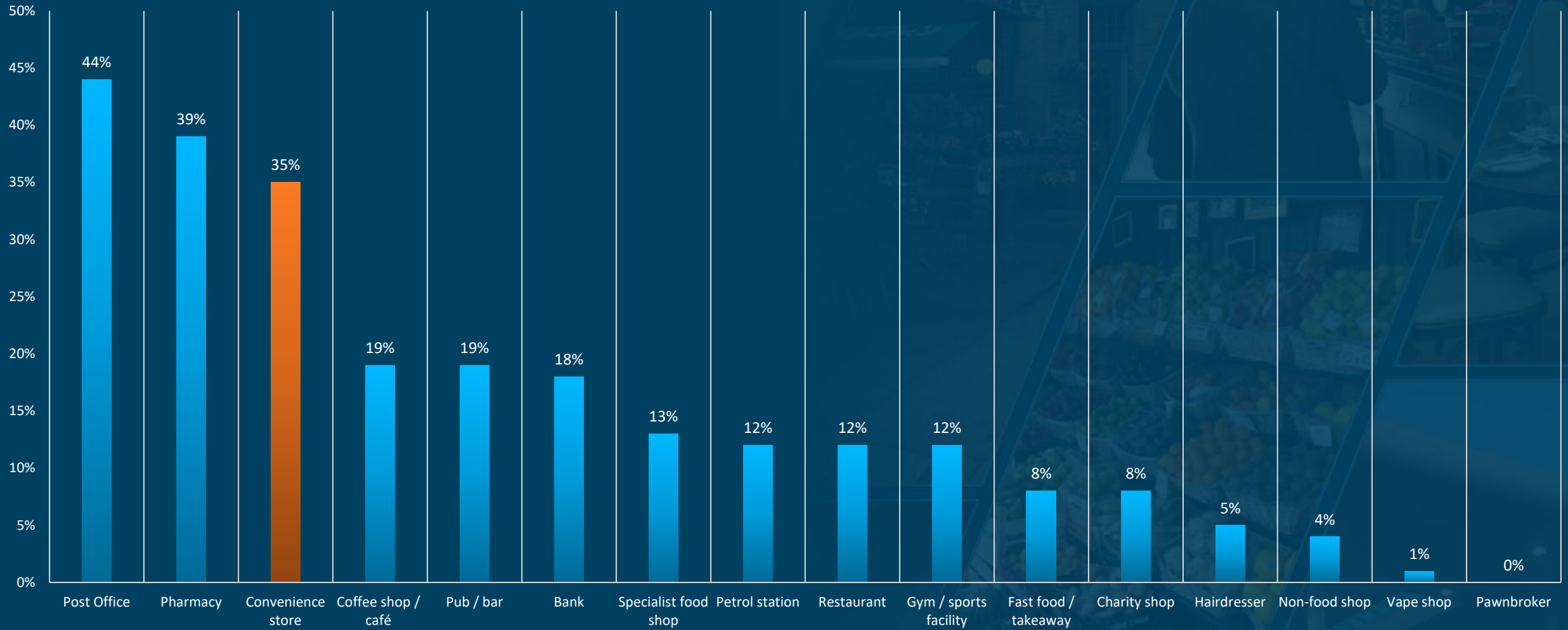
# Service Provision

Which of the following services do you have in your local area?



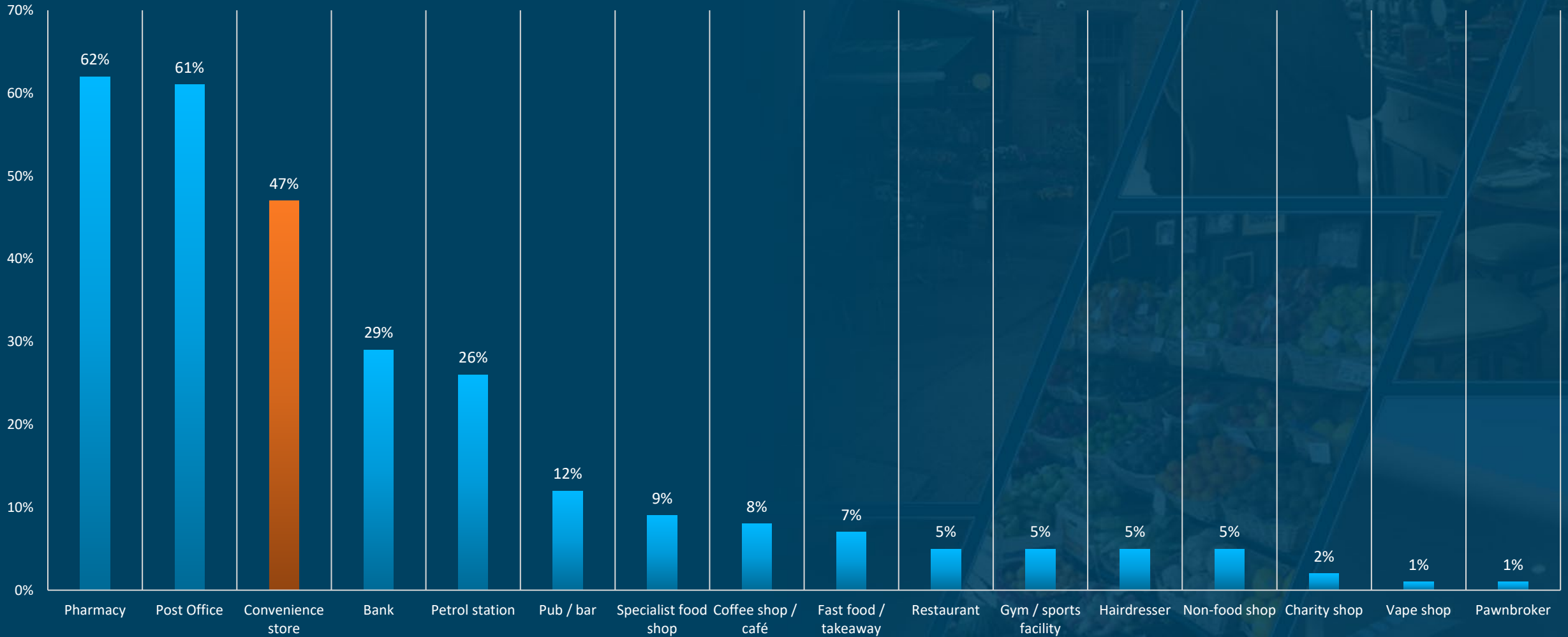
# Most Positive Impact

Which of the following types of services, if any, has the most positive impact on your local area?



# Most Essential Service

Which of the following services, if any, do you think are the most essential for your local area?



# Provision and Impact: Analysis

- Convenience stores operate in every part of the UK, in town and city centres, on high streets, in housing estates, and in rural areas where the provision of other services is scarce. In total, there are 48,590 convenience stores operating in communities across the UK.
- Generally the provision of services near where people live is positive, with the majority of consumers having access to a wide range of services. The most striking example of a lack of service provision is with banks, which have seen a major decline in numbers in recent years.
- The top three services for most positive impact, and for most essential have been very consistent in the years that we have conducted the Community Barometer. The three have often switched places, with Post Offices and pharmacies being top for the most positive and most essential service respectively. In both, convenience stores are third but there is then a significant drop off to the rest of the services listed.
- Convenience stores increasingly feature the services in the top two for most essential and most positive impact – most notably through both Post Office counters in stores, as well as fortress style Post Offices that share space with the store. 3% of convenience stores also offer prescription collections as part of their service to customers.

## Top Three Local Services (Positive Impact)



1  
Post Offices



2  
Pharmacies



3  
Convenience Stores

## Top Three Local Services (Most Essential)



1  
Pharmacies



2  
Post Offices



3  
Convenience Stores

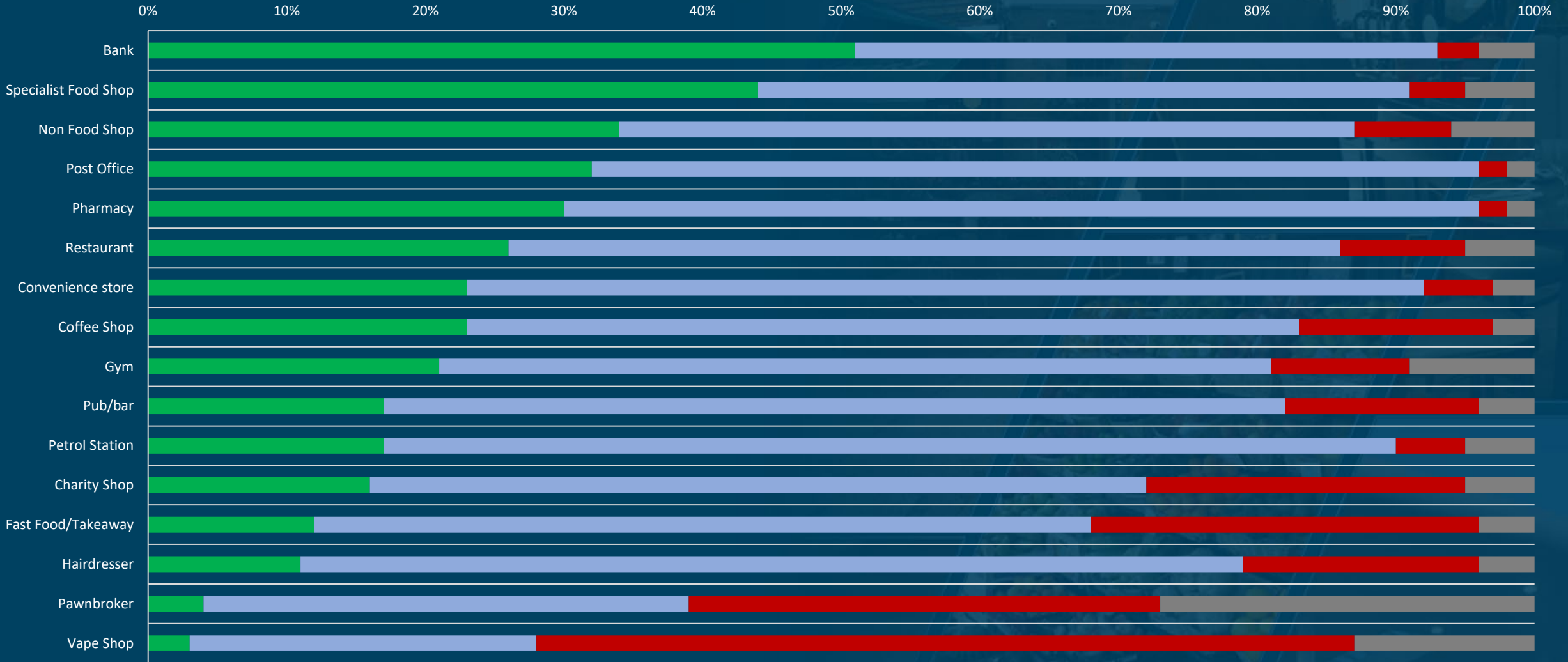
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2023

# Most Wanted Services



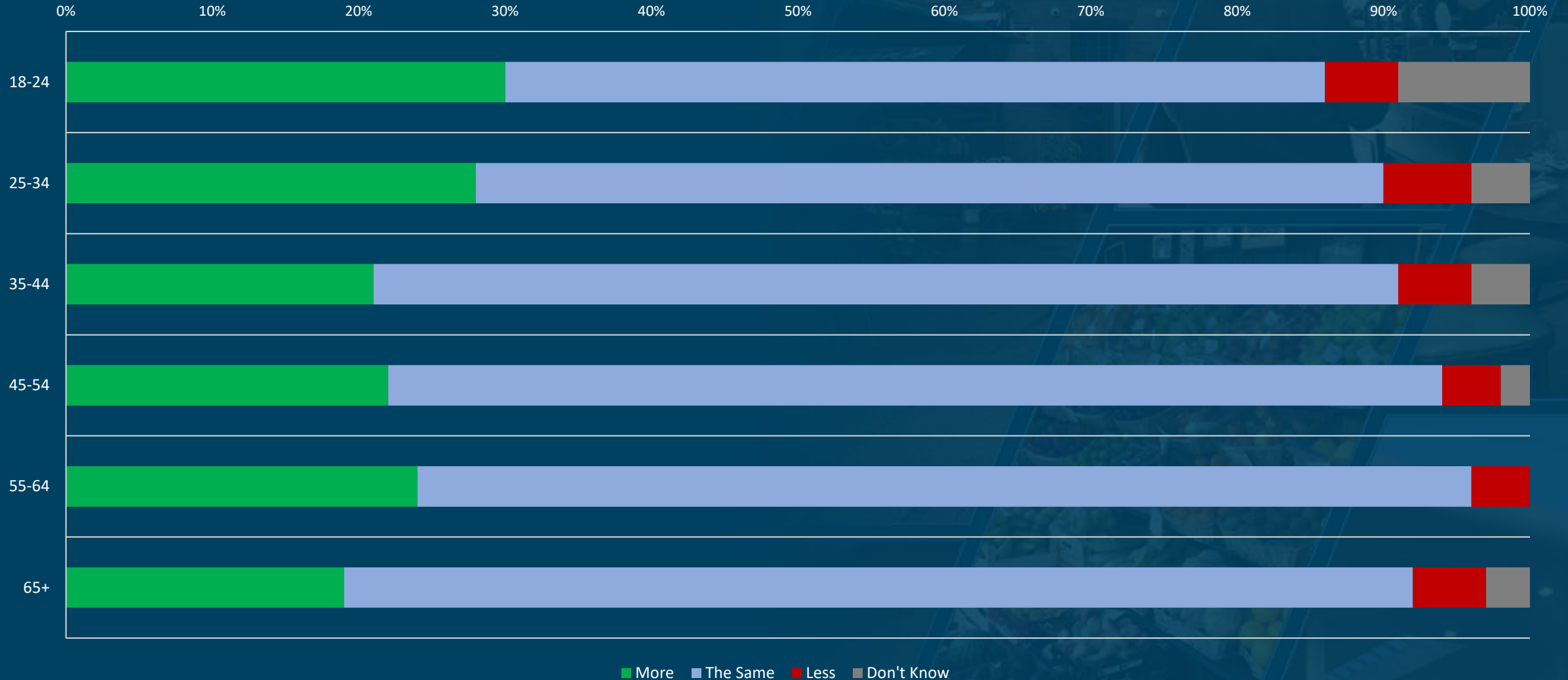
# Most Wanted Service

For each of the following services, would it be beneficial to have more or less of that service in your local area?



# Most Wanted Service: Convenience Stores By Age of Consumer

Do you think that it would be beneficial for your local area to have **more or less convenience stores**



# Most Wanted: Analysis

- It is clear from the views of consumers that the reduction in the number of banks has left a void on high streets and in communities, with bank branches a clear leader in the list of services that people want more of locally.
- There remains a desire for more ‘traditional’ services to be available locally – businesses like specialist food shops such as bakeries and greengrocers, hardware and other non-food stores, Post Offices and pharmacies are all seen as services that are wanted near to where people live.
- The provision of convenience stores in communities is high, so it’s not surprising that people aren’t too concerned about having more of them locally with most being happy with the levels of provision that they have.
- By age, younger consumers tend to be more keen on having a wider provision of convenience stores in their local area. This is in contrast to the idea that it is just older consumers that value the contribution of their local convenience store.
- When asked about where they typically withdraw cash, 60% of consumers said they used a free to use ATM at their local shop compared to just 34% who withdraw cash at a bank branch. Just 8% of consumers said they never withdraw cash.

## Top Three Most Wanted Services



1  
Banks



2  
Specialist Food Shops



3  
Non Food Shops

## Additional Insights

- Across the UK, Scotland, Yorkshire & Humber and the South West are tied as the regions that most need banking services (59% in each region want more banks)
- London consumers polled as the region that was least in need of more banking services, but it was still the top most wanted service (43% in London want more banks)

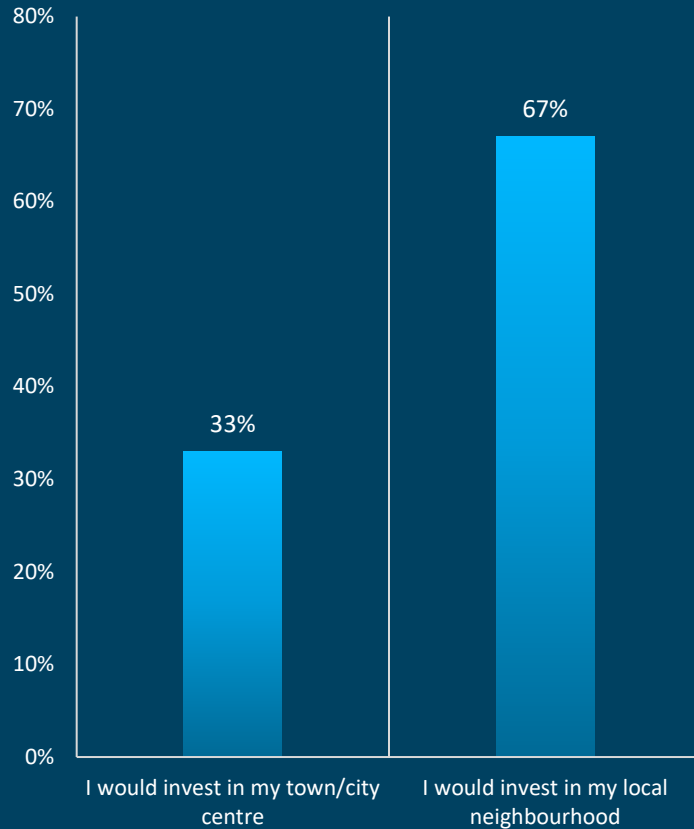
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# Investment Priorities

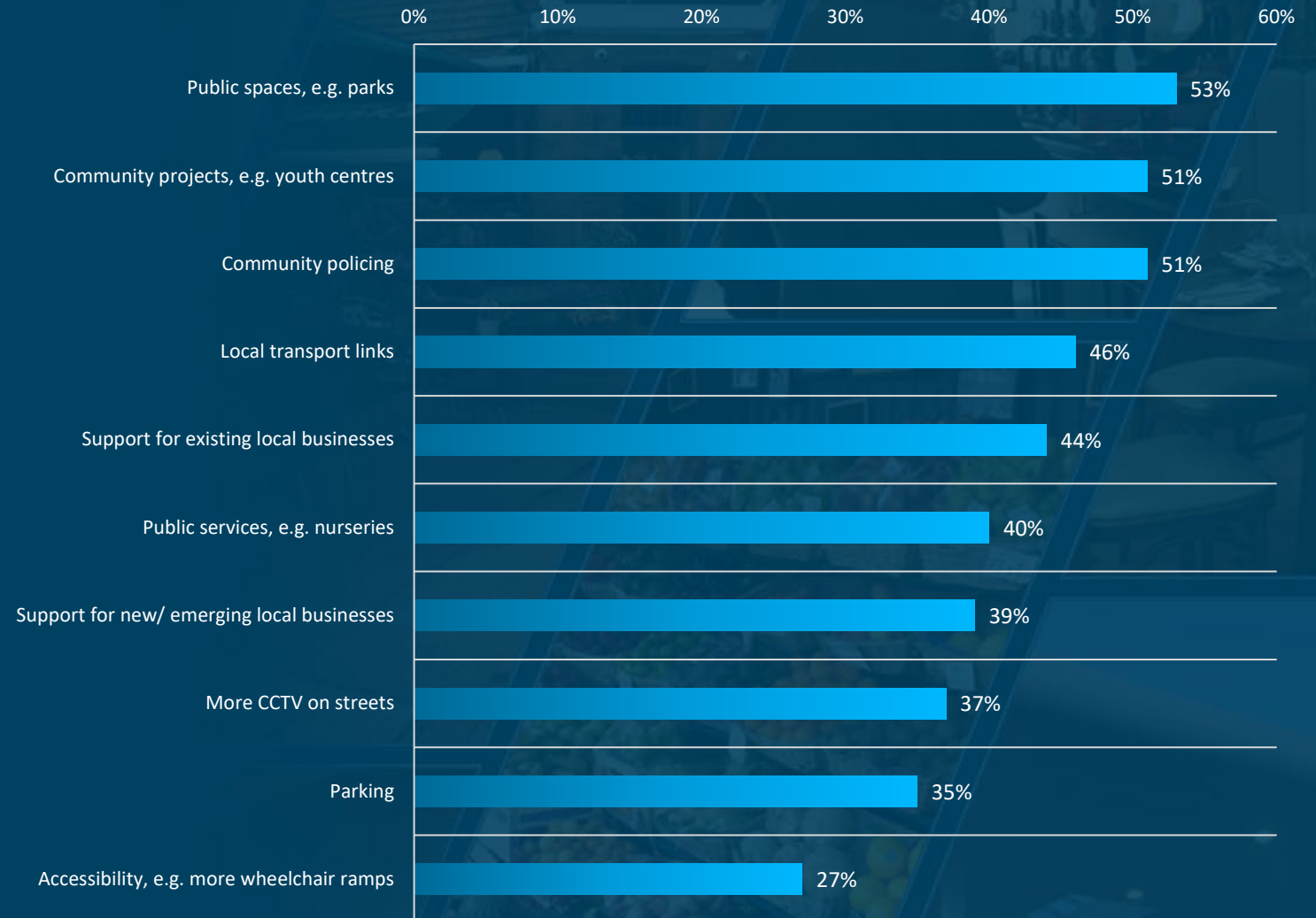


# Local Investment Priorities

If you were in charge of a fund which you could invest in either your local town/city centre or your immediate neighbourhood, which would you choose to invest in?

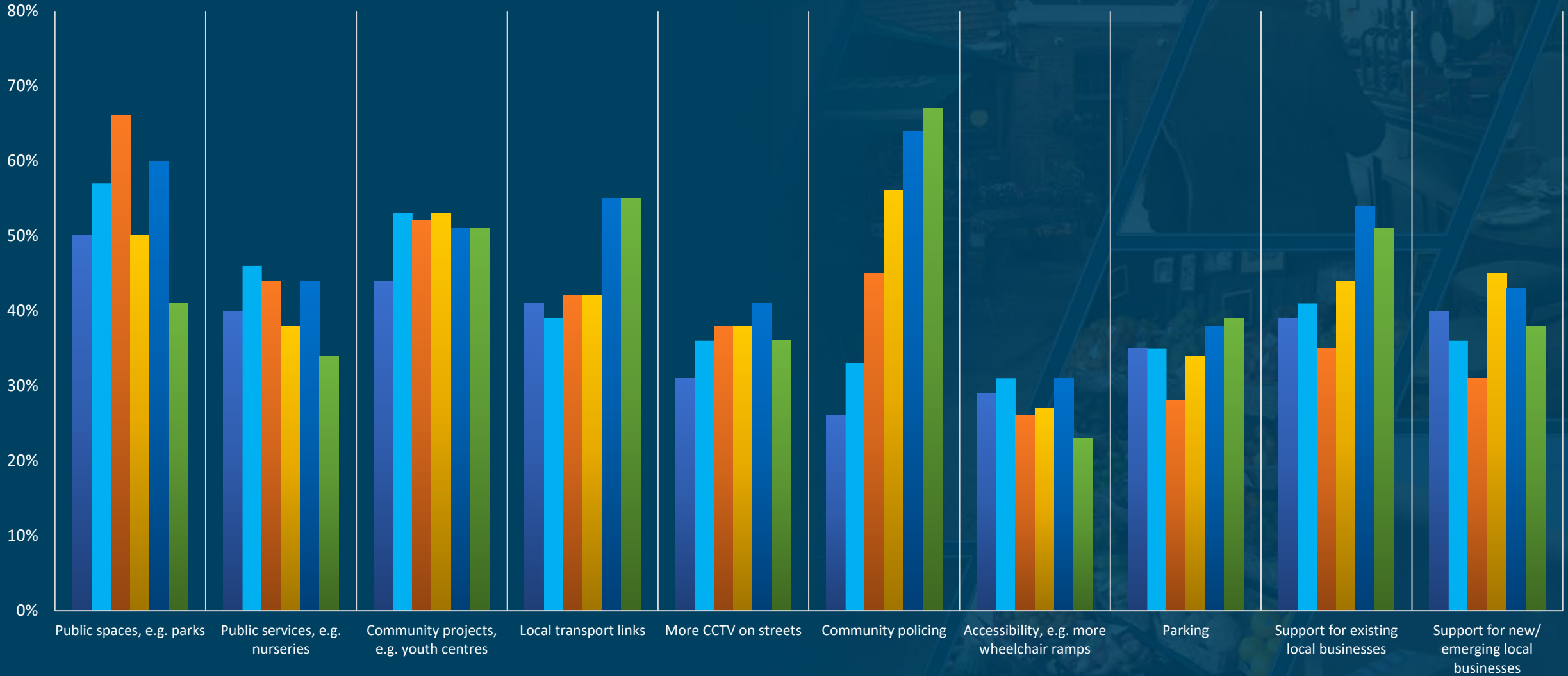


...and which of the following areas would you choose to invest in?



# Local Investment Priorities

...and which of the following areas would you invest in?



# Investment Priorities: Analysis

- The year on year results for the question on where to invest have been very consistent, with around two-thirds of respondents preferring to invest in their immediate local area rather than in their nearest centre.
- We do not believe that this suggests that town centres should be abandoned when it comes to investment, more that it's important that local plans consider targeted investment in service provision in the areas where people live. Remote working has become a staple for millions of people across the UK, so it is unsurprising that there is more of an awareness and appreciation of local service provision.
- The remote working trend is likely driving the need for high quality public spaces and community projects.
- It is clear from the responses that as the age groups increase, the demand for more community policing locally gets higher. This is the most stark trend among different age groups for all of the options surveyed.

## Top Three Investment Priorities



1  
Public spaces



2  
Community projects



3  
Community policing

## Additional Insights

- Across the UK, the South West was the region that polled as most keen on having more public spaces (64% would invest in this area)
- Support for existing local businesses was lowest across the UK in London (33%, compared to UK average of 44%)

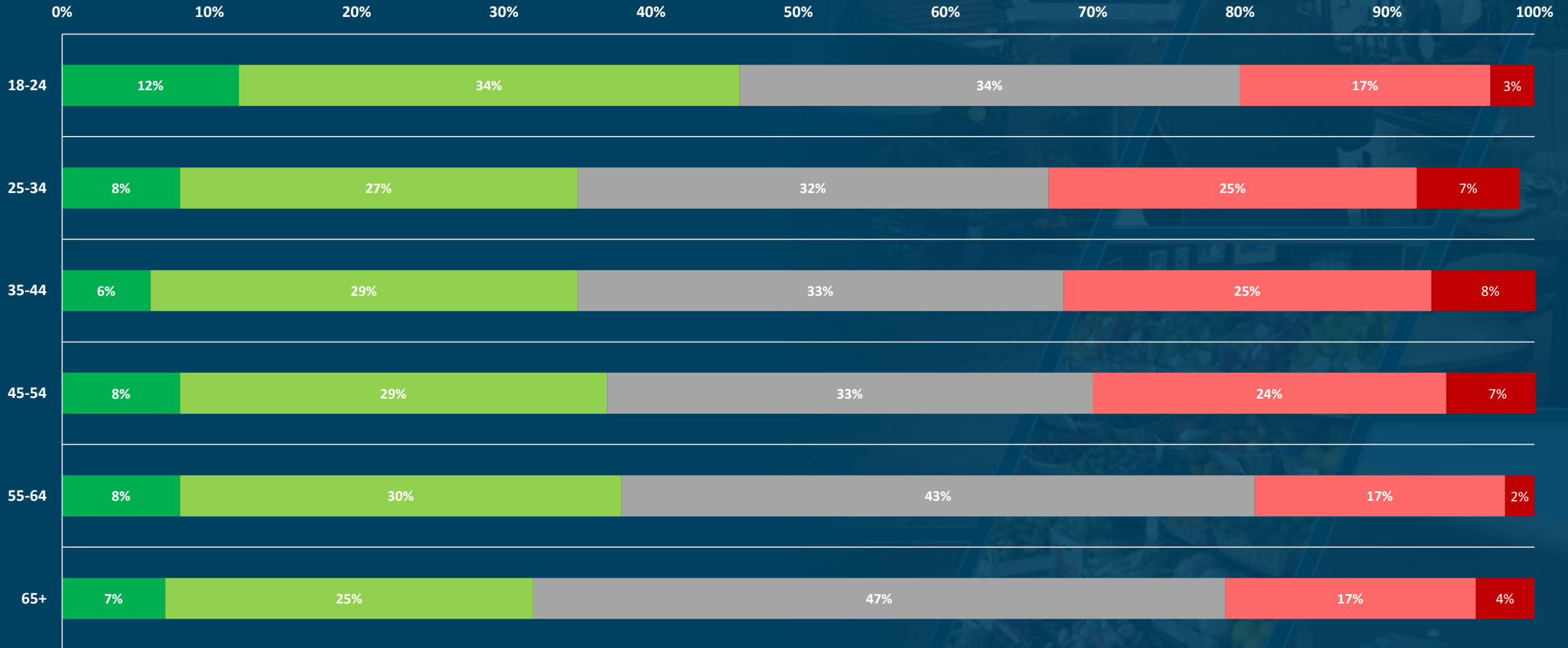
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Community



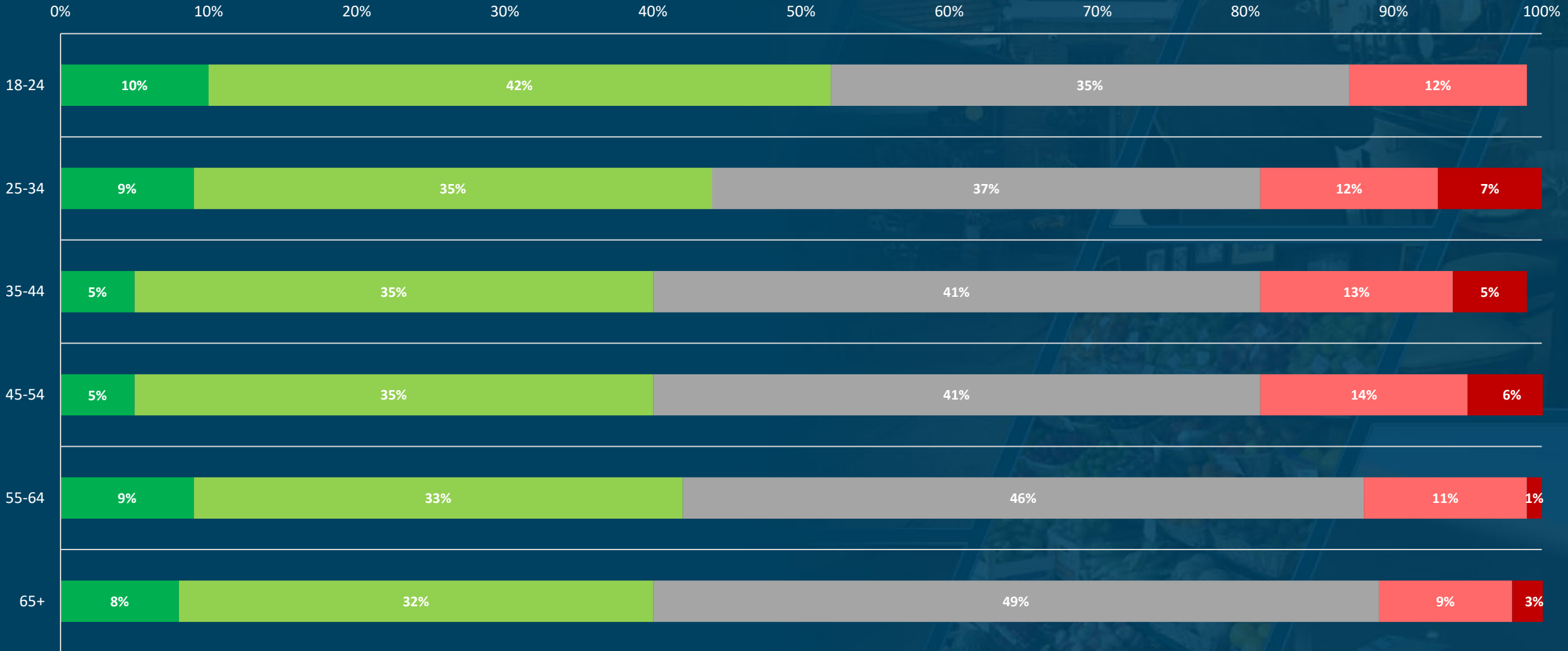
# Convenience Stores and their Place in the Community

How much do you agree with the following statement: **“My local shop acts as a community hub”**



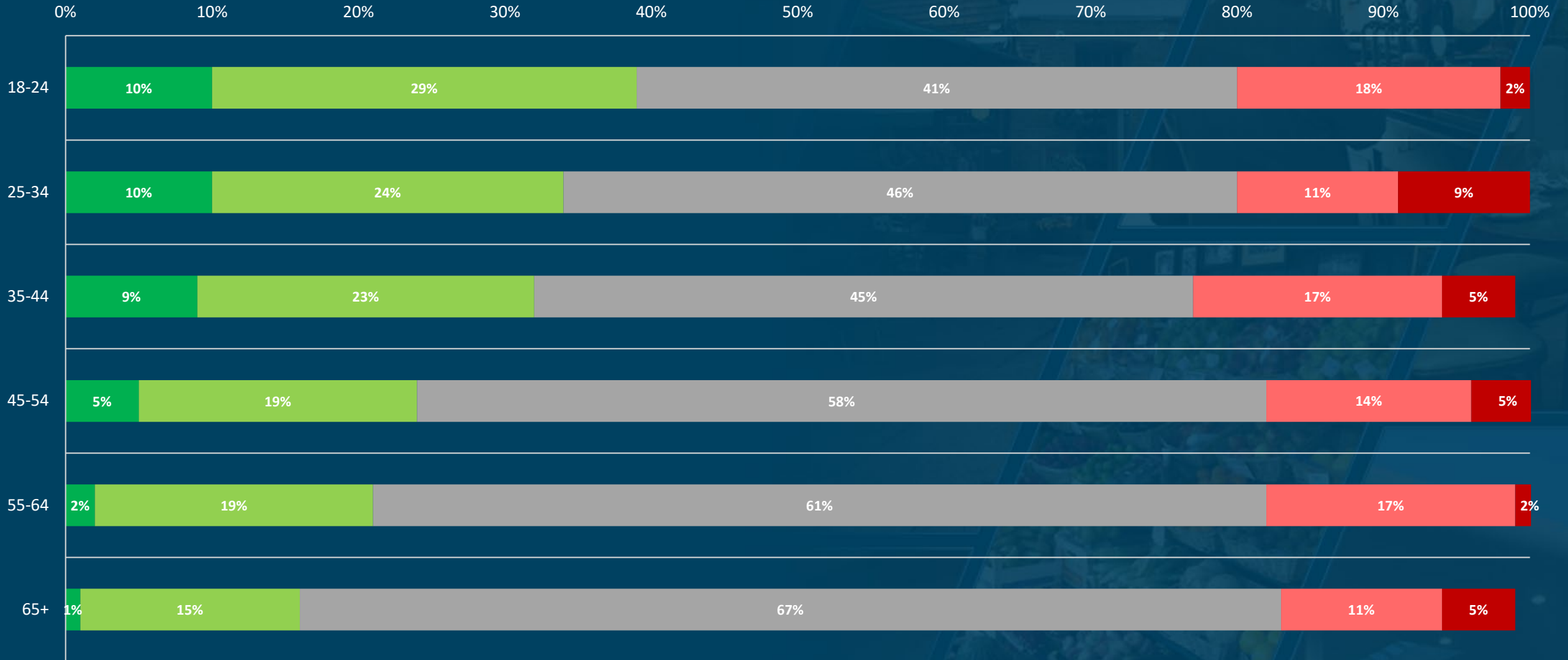
# Convenience Stores and their Place in the Community

How much do you agree with the following statement: **“My local shop helps to reduce loneliness in my community”**



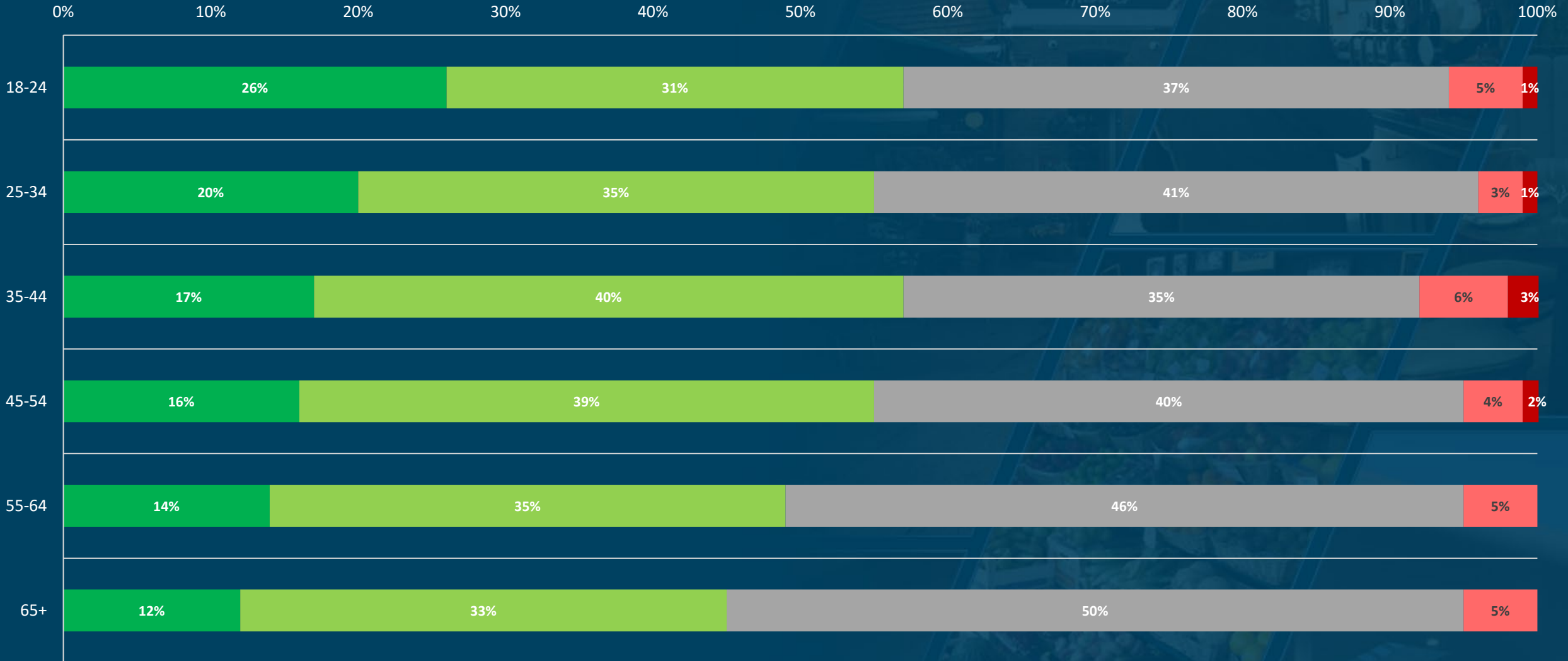
# Convenience Stores and their Place in the Community

How much do you agree with the following statement: **“My local shop helps keep people safe at night”**



# Convenience Stores and their Place in the Community

How much do you agree with the following statement: **“My local shop takes preventing underage sales seriously”**



# Convenience Stores and their Place in the Community

How much do you agree with the following statements...



# Convenience Stores and Community: Analysis

- Convenience stores have a really important role to play during the cost of living crisis, helping people to save money by being able to walk to their local shop, as well as saving people having to make multiple trips by providing a multitude of services under one roof.
- On the different questions asked about community engagement, consumers responded most positively to local shops' responsibility when it comes to preventing underage sales. This was most prevalent among 18-24 year olds, who will typically be the group most likely to be asked for identification when in store.
- Young people (18-24 year olds) were the most positive age group when asked about their local shop as a community hub. This again challenges the notion that convenience stores are just an important community service for older customers.
- It is clear that convenience stores play a crucial role in helping to reduce loneliness and keep people safe at night. Those most likely to be out late (younger age groups) are more positive about this area.
- Loneliness has historically been seen as something that affects older consumers more acutely than younger ones, but there is no strong age correlation in the groups when asked about their local shop as a factor in reducing loneliness locally. This may be a consequence of more remote working and people socialising less on a day to day basis.

## Top Three Ways Convenience Stores Help in the Cost of Living Crisis

1. Help people save money on fuel as they don't have to travel as far
2. Help people save money on fuel as there are a variety of services in one place
3. Help people manage food waste by shopping little and often

## Additional Insights

80%

of convenience store customers come from within a mile of the store

73%

of convenience stores engaged in some form of community activity last year

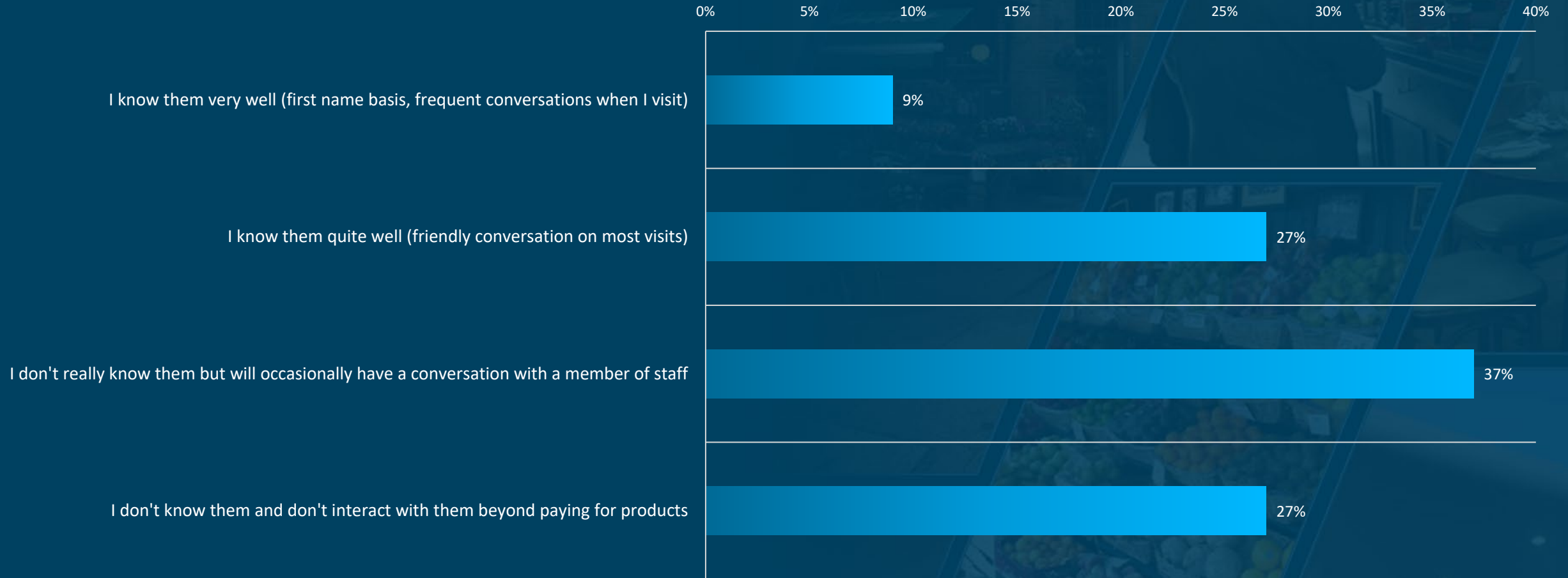
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Local  
Relationships

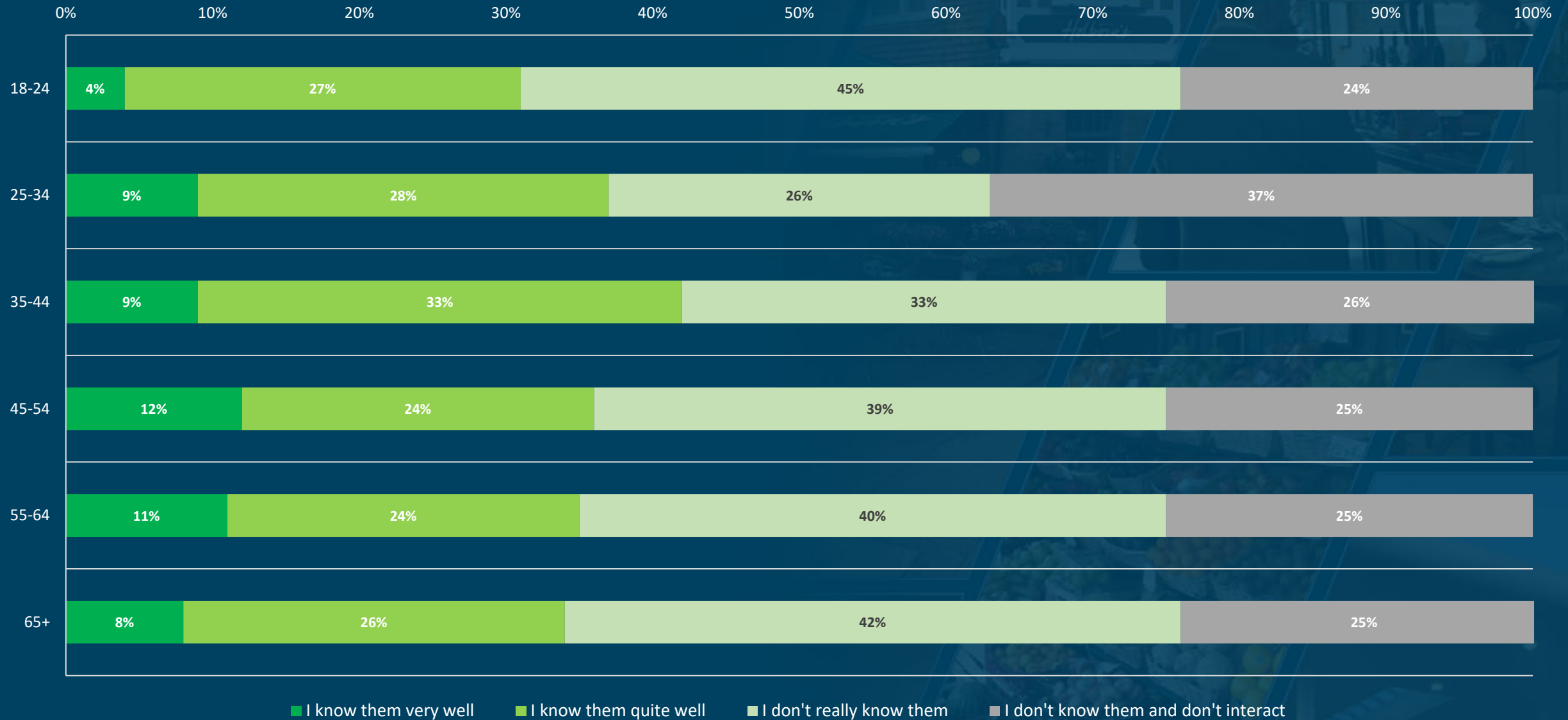


# Customer's Relationships with Local Shop Colleagues

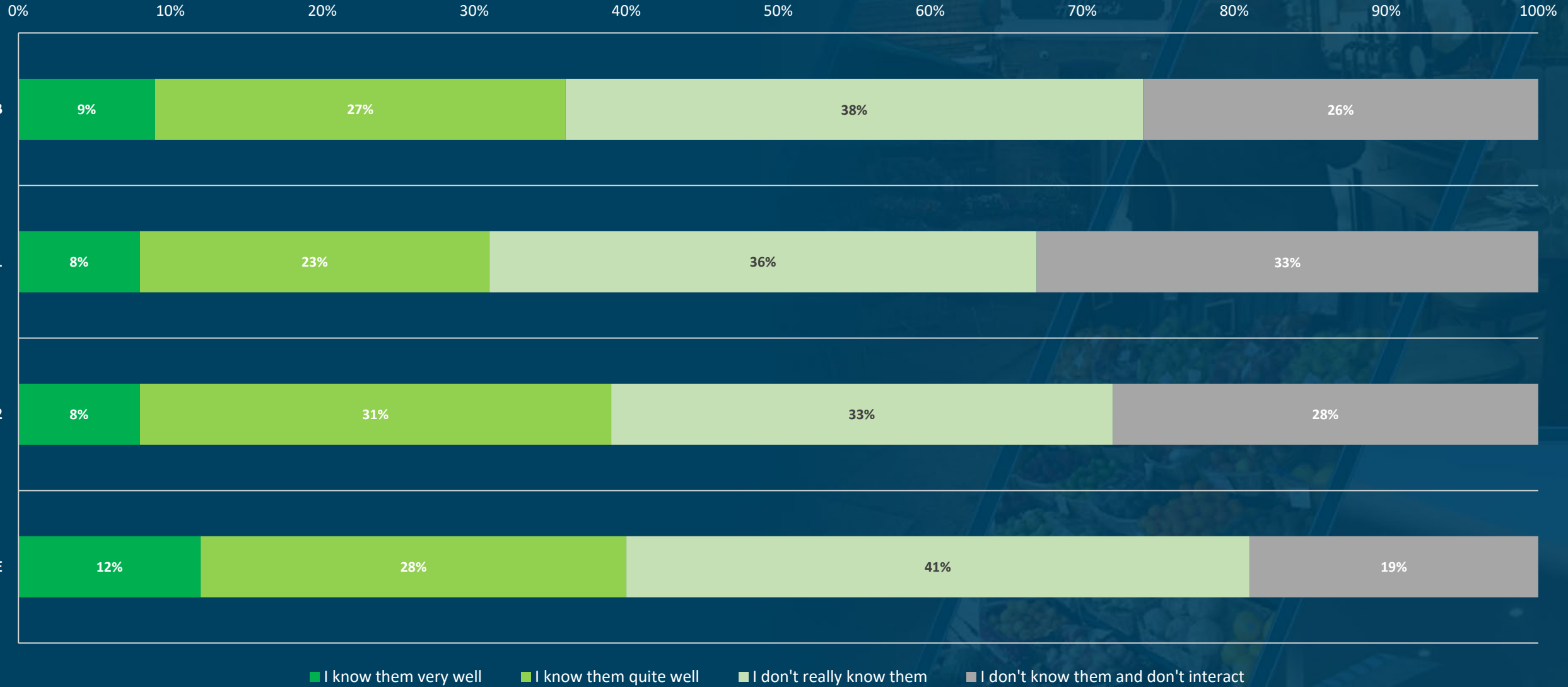
Which of the following best describes your relationship with the people running and working in your local shop?



# Customer's Relationships with Local Shop Colleagues: By Age



# Customer's Relationships with Local Shop Colleagues: By Social Group



## Local Relationships: Analysis

- One of the reasons why convenience stores are consistently rated as positive, essential services is the intangible social benefit they provide to local people, especially those who are vulnerable or otherwise isolated. For many, the conversation that a person has with a colleague in their local shop could be the only human interaction they have that day. This previously has been suggested to affect mainly older consumers, but the results throughout the Community Barometer suggest that all age groups benefit from the community role that local shops play.
- Local shops remain extremely well placed to respond to the concerns of customers. 36% of convenience stores donate food to local food banks, and a growing number are working in partnership with apps like Too Good to Go and Gander to provide reduced price items that are near their best before dates.
- The growth of self service tills in stores is not necessarily aimed at reducing the number of interactions between customers and colleagues. They serve to help those who don't want to interact get in and out quickly, whilst freeing up colleagues to have higher quality conversations with customers that want to talk.

### Across the UK...

- Scotland is the 'friendliest' part of the UK, with 17% of consumers saying they know the people in their local shop very well, compared to a UK average of 9%
- The South West is the region where the highest proportion of consumers (35%) don't know or interact with the people working in their local shops, compared to UK average of 27%

### Additional Insights

**12%** of convenience stores provide self service checkouts for customers

The average convenience store customer visits their local store **2.7** times per week

# Community Barometer 2023

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