

# Community Barometer 2022

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 May 2022. 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? (options on slide 10)

*\*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



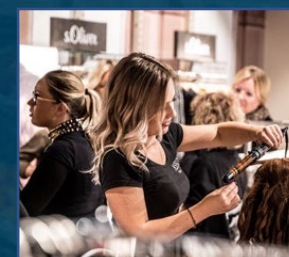
Betting Shops



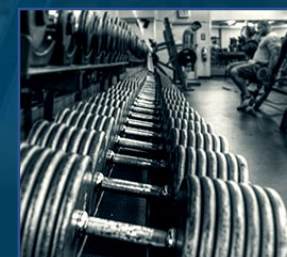
Charity Shops



Pawnbrokers



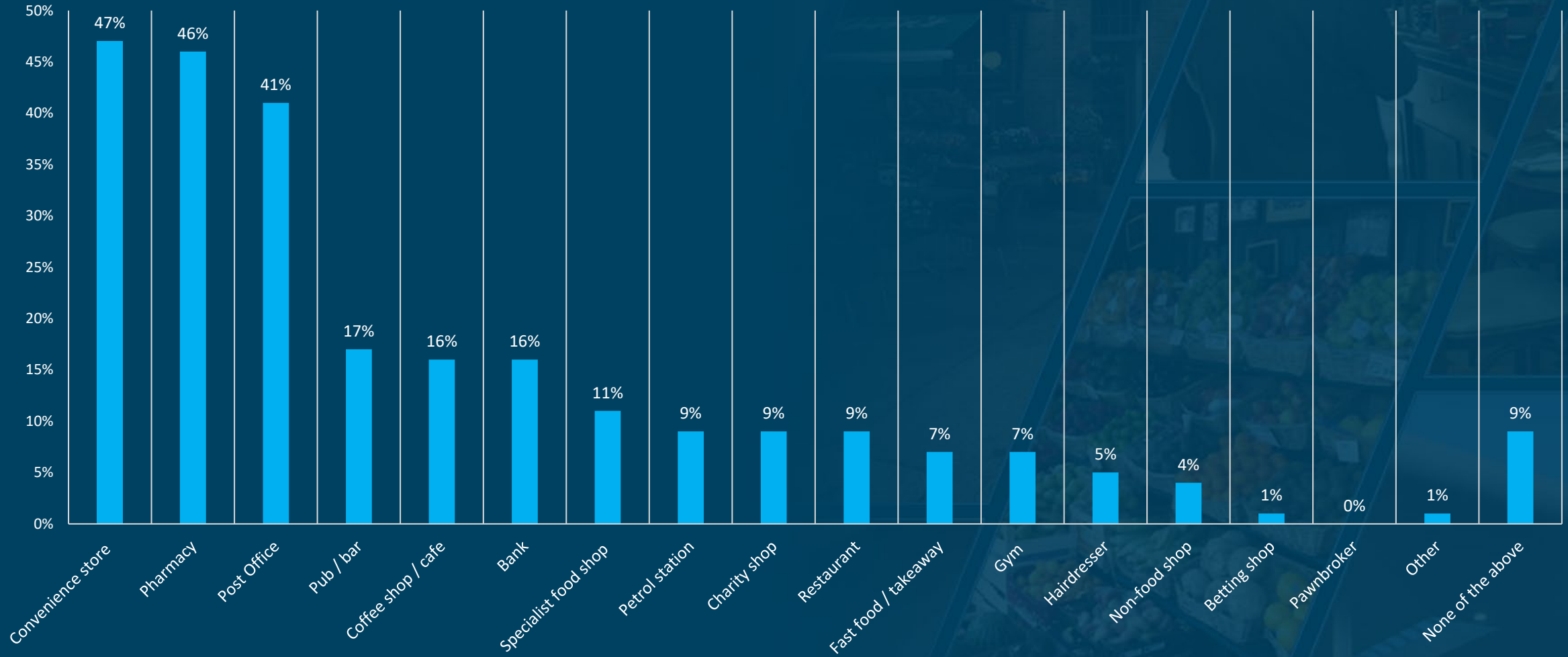
Hairdressers



Gym or Sports Facilities

# Most Positive Impact

Which of the following types of services, if any, do you believe have the most positive impact on your local area?





## Most Positive Impact: Analysis

- Convenience stores have been consistently rated as one of the services that have the most positive impact locally every year since we started producing the Community Barometer a decade ago.
- In recent years, convenience stores have established themselves as local community hubs, especially during the pandemic when thousands of local shop owners went the extra mile to ensure that local people still had access to essential goods and services.
- Many convenience stores also house other positively held services, such as Post Office counters and pharmacies.

## Top Three Local Services



1  
Convenience stores



2  
Pharmacies



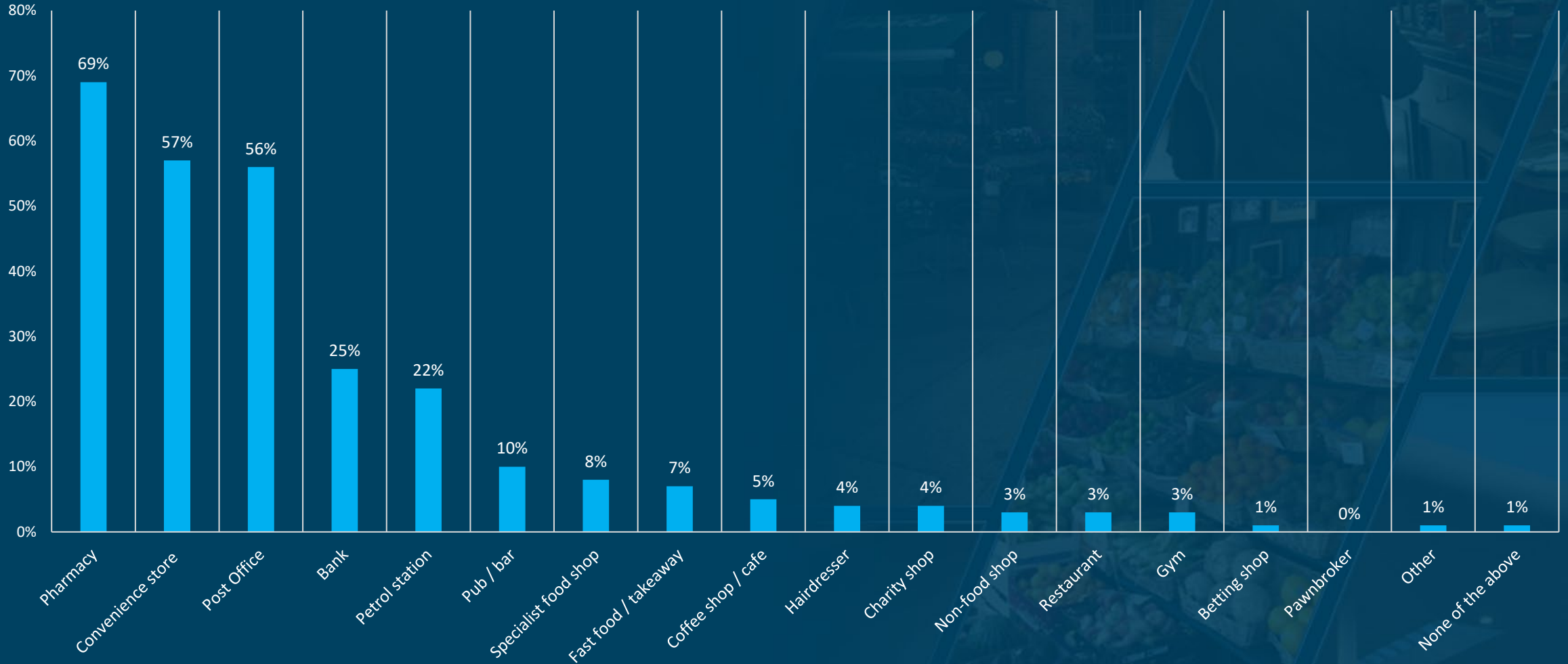
3  
Post Offices

## Additional Insights

- Convenience stores poll the most positively with consumers in the 55-64 age group
- Pharmacies are seen to be the service that has the most positive impact for consumers in the 18-24 age group

# Most Essential Service

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



# Most Essential Service: Analysis

- It is unsurprising to find that pharmacies are seen as the most essential service locally, with the value of pharmacies to consumers never being higher than it has through the pandemic.
- This is the area where petrol stations poll the most favourably, featuring in the top five most essential services. This may be as a result of more consumers being aware of local petrol stations and the services they offer through the pandemic when other services were closed, or with more consumers realising the importance of their local petrol station when there were fuel supply chain issues earlier in the year.

## Top Three Local Services



Pharmacies



Convenience Stores



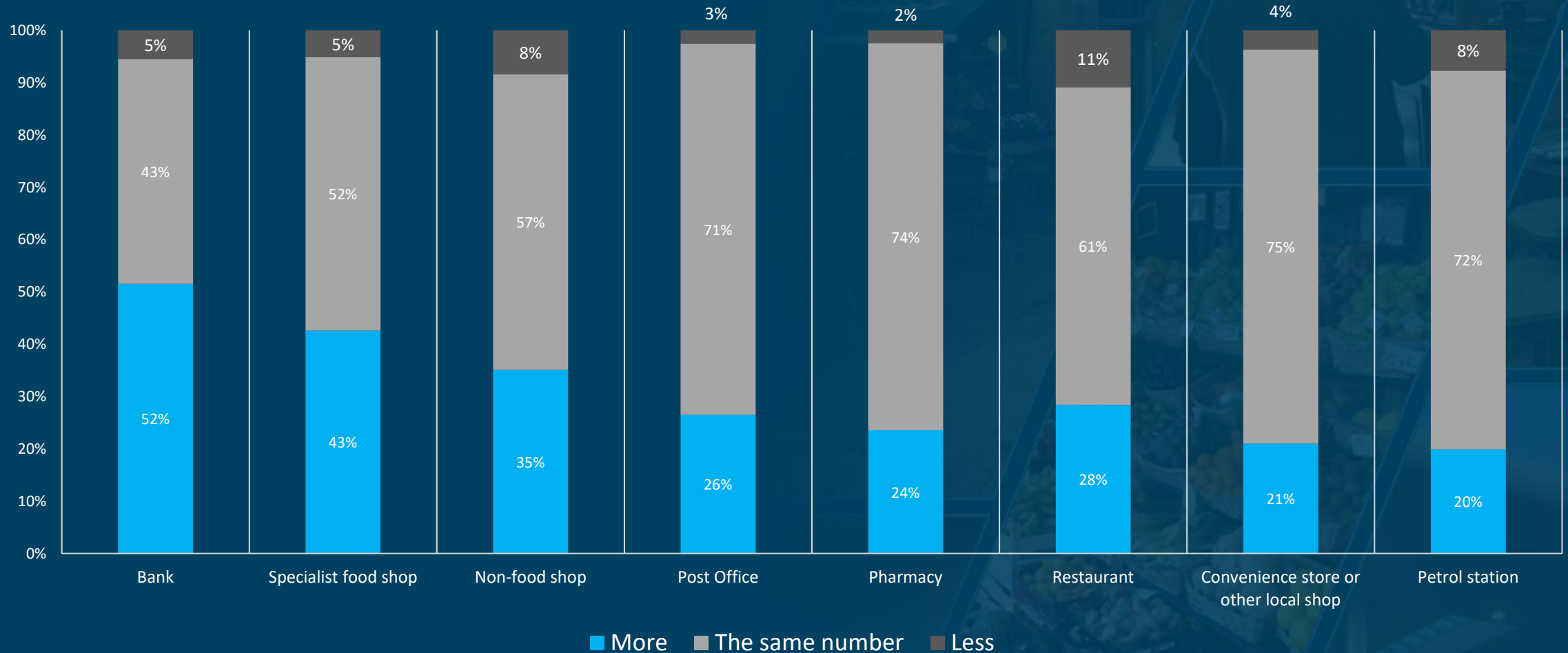
Post Offices

## Additional Insights

- Wales is the UK region where more consumers see convenience stores as essential than any other (72%)
- Pharmacies, Post Offices and petrol stations are all services that have become more essential to consumers than they were in 2021.

# Most Wanted Service

Please indicate whether you think that it would be beneficial for your local area to have more or less of these types of services





# Most Wanted Service: Analysis

- In recent years, there has been a significant reduction in the number of bank branches and ATMs available across the UK, with convenience stores often being the only place where people can access cash for miles.
- Consumers are typically happy with the number of convenience stores that they have in their local area. There are currently around 47,000 convenience stores in the UK, with a unique reach into every community.
- Convenience retailers looking to increase the range of services they offer locally may benefit from looking to the most wanted services such as banking services or a specialist food offer to have the most impact.

## Top Three Most Wanted Services



Banks



Specialist Food Shops



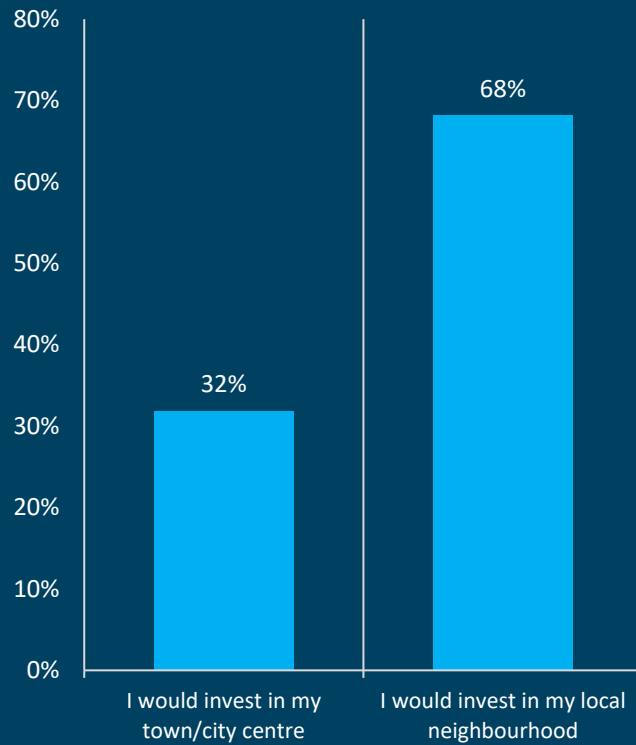
Non-Food Shops

## Additional Insights

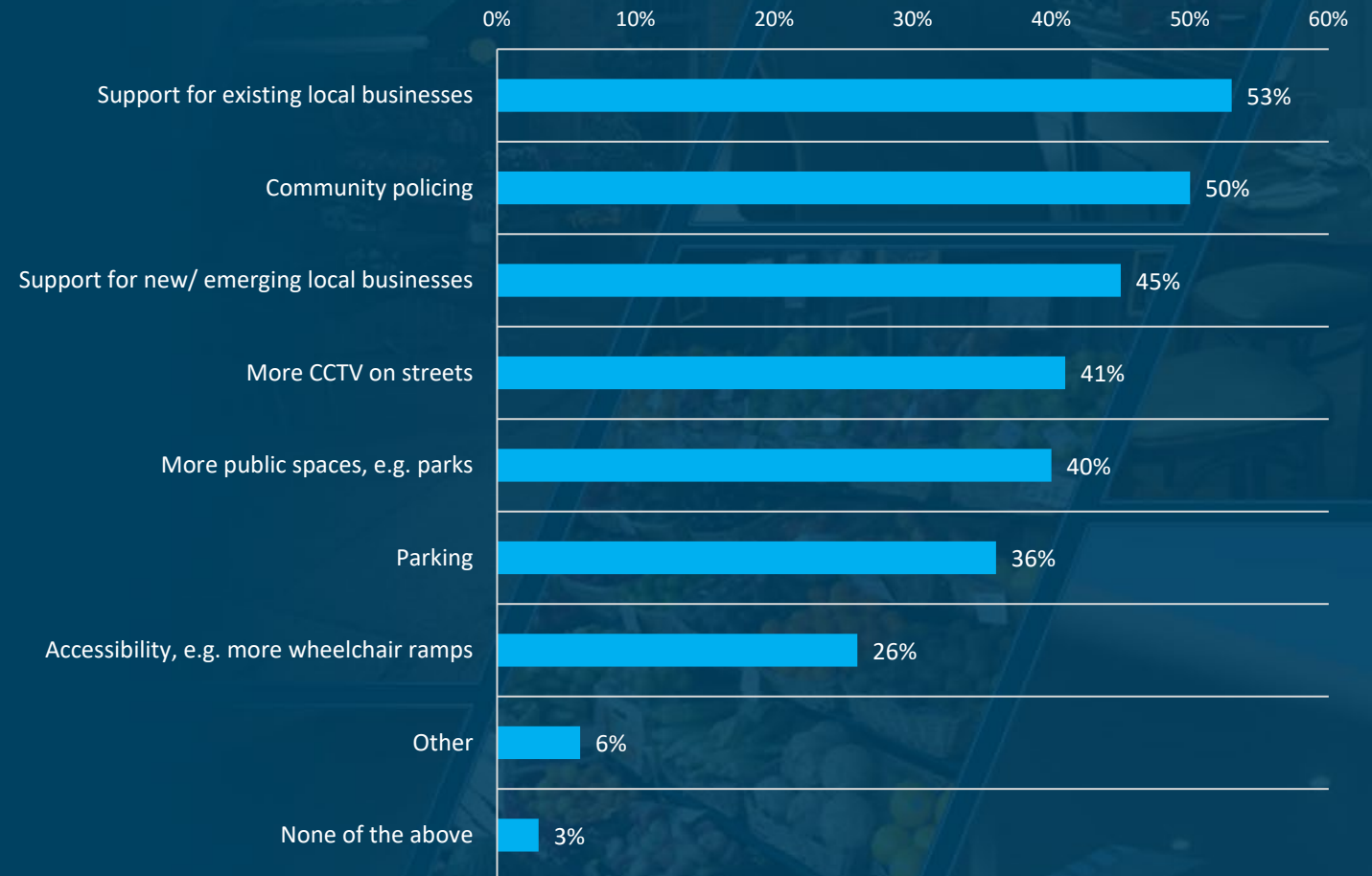
- Across the UK, the South East is the region where more convenience stores are wanted the most (27%)
- 23% of consumers in rural areas want more convenience stores locally, compared to 19% of consumers in urban areas

# 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 elements would you choose to invest in?



# Local Investment Priorities: Analysis

- These findings are important in outlining to those who allocate investment that levelling up is about more than just town centre funding – consumers also want to see more support for businesses in the villages, parades and high streets nearby.
- The demand for local investment from rural consumers especially demonstrates the need for the Government to focus its levelling up agenda on ensuring that rural consumers have access to a diverse range of goods and services, and that rural businesses are supported in being able to provide those goods and services through reliable mobile, broadband and transport connectivity.
- While young people see town centre investment as important, this may not be for retail purposes, instead it is likely that town centres are viewed as positive spaces for socialising.

## Top Three Investment Areas



1  
Support for existing businesses



2  
Community policing



3  
Support for new businesses

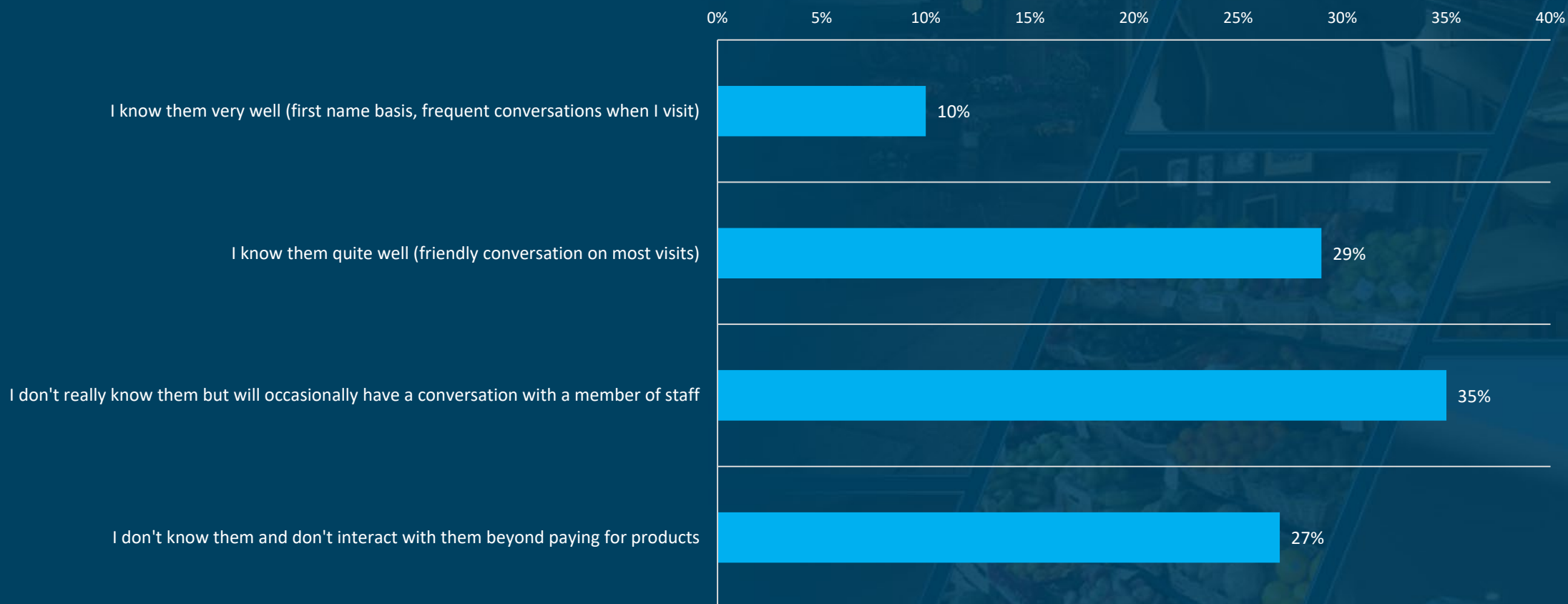
## Additional Insights

- Investment priorities track with age groups, with 18-24s evenly split between town centre (49%) and local area (51%) investment, compared to those over 65 who strongly value local investment (75%) over town centre investment (25%)
- Rural consumers are much more likely to want local investment (84%) than their urban counterparts (64%)



# 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?



## Local Relationships: Analysis

- One of the reasons why convenience stores are consistently rated as a 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 that they have that day.
- Because of the relationships that local shops have with their customers, they are well placed to respond quickly to local concerns. A growing number of retailers donate products to food banks (32%\*) and many are looking into partnerships with apps like Gander and Too Good to Go which signpost products that have been reduced in price.

\*Source: ACS Local Shop Report 2021

## Community Activity in Local Shops

# 80%

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

Source: ACS Local Shop Report 2021

## Additional Insights

- Rural consumers are more likely to know the colleagues in their local shop at least quite well (44%) than their urban counterparts (37%)
- More consumers in Scotland know colleagues in their local shop at least quite well (48%) than any other part of the UK

# Cost of Living Crisis: How Local Shops Can Help

## Top Three Ways that Customers Use Local Shops to Help Manage their Money

Walking to your local shop saves money on fuel as you don't have to travel as far



65% agree

Local shops allow you to use a range of services in one place, saving on trips



61% agree

Local shops are a convenient alternative to delivery apps like Deliveroo or Uber Eats



57% agree



78%

of consumers agree that using local shops is good for the environment, as they don't need to drive to store



# Cost of Living Crisis: How Local Shops Can Help

## More Ways that Customers Use Local Shops to Help Manage their Money

- Buying little and often from local shops helps customers **manage food waste** (53% agree / 12% disagree)
- Buying little and often from local shops helps customers **manage their money** (47% agree / 18% disagree)
- Using local shops to buy food and drink for a 'big night in' **saves money compared to going out** (46% agree / 16% disagree)

## Additional Insights

Consumers in London are most likely to see local shops as a convenient alternative to delivery apps like Deliveroo/Uber Eats

(69% agree)



Consumers in the DE demographic are most likely to see local shops as helpful in managing food waste

(61% agree)



Consumers in the WM region are the most likely to use local shops to save money for a big night in (61%) compared to those in the NE who are least likely to do so (39%)



# Cost of Living Crisis: How Local Shops Can Help

## Healthy Start

- Healthy Start is a government scheme that helps women who are pregnant or have young children buy healthy food and milk and get free Healthy Start vitamins
  - It is a digital scheme that offers a prepaid card to those applying for Healthy Start instead of paper vouchers
- 
- Owners of the pre-paid card can use it in most shops that sell eligible products
  - Retailers can begin accepting payments via the customer's pre-paid card immediately



# Community Barometer 2022

For more information, contact:

**Rosie Wiggins**

Research Executive

[Rosie.Wiggins@acs.org.uk](mailto:Rosie.Wiggins@acs.org.uk)

**Chris Noice**

Communications Director

[Chris.Noice@acs.org.uk](mailto:Chris.Noice@acs.org.uk)

