



Community Barometer 2021

A report from the Association of Convenience Stores

Introduction

The Community Barometer provides new insight into the provision of shops and other local commercial services, their role in benefitting the community, and how people feel about them.

The Omnibus poll that we conducted 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 reducing loneliness** 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 the presence of these services locally would have a **positive or negative impact on house prices** in your 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.

The local services that we look at in the Community Barometer are as follows:

<p>Convenience Stores Specialist Food Shops Banks Post Offices</p>	<p>Non Food Shops Pharmacies Restaurants Pubs/Bars</p>	<p>Coffee Shops Petrol Stations Fast Food Shops Betting Shops</p>	<p>Pawnbrokers Charity Shops Gym or Sports Facilities Hairdressers</p>
---	---	--	---

By looking at how people view the value of different services in their local communities, we have generated insights that could inform decision making in national and local government, as well as helping convenience retailers as they consider how to make investments in their business in new services for their local customers. ACS has developed a number of policy recommendations based on the findings of the Community Barometer on how the government can level up service provision in communities, which is available at www.acs.org.uk.

More information about the methodology for this research, as well as previous versions of the Community Barometer are available on the ACS website at www.acs.org.uk

Most Positive Impact



Convenience stores have polled as one of the top three services that have an overall positive impact on their local area for several years, followed closely by pharmacies and Post Offices. In the polling data, there is a significant gap between the top three services listed and the rest - this is perhaps due to many of the other services being closed at times over the last year.

These latest results are unsurprising considering the enormously valuable role that convenience stores have played throughout the pandemic, with thousands of stores stepping up to provide additional services and often being the only place where local people can get their groceries.

In times both with and without restrictions, convenience stores have established themselves as community hubs, with retailers, colleagues and customers alike having strong local ties and stores being a place where local relationships can thrive. Figures from the 2020 Local Shop Report show that over a third of customers in convenience stores either know the people working in their local shop quite well or very well.

Most Essential Services



When people consider what they actually need in their local area, pharmacies, convenience stores and Post Offices all perform very well, followed closely by banks and petrol stations. To some extent, all of the top five essential services are being offered in a modern convenience store through Post Office and pharmacy counters within both standalone and forecourt stores, in addition to the provision of free-to-use ATMs. Convenience stores also deliver value by providing those services close by - figures from the 2020 Local Shop Report show that if their local shop wasn't there, 4/10 consumers would have to travel more than two miles to access essential groceries and services.

Throughout the pandemic, convenience stores have cemented their 'essential business' status by supporting elderly, vulnerable and isolating local customers through links with councils and the introduction of delivery services, often as simple as providing a phone number for people to call and let the retailer know what they need. At the peak of the first lockdown, over 600,000 home deliveries were going out from convenience stores every week.

Impact on Reducing Loneliness



Loneliness has been a serious issue throughout the pandemic, especially for vulnerable people and for those living alone. Services that act as social hubs poll the most positively with consumers, with convenience stores in the top three.

Convenience stores play an important role in reducing loneliness for local people. As one of the only services that was able to deliver to people's homes during the pandemic, store colleagues were able to check in on the most isolated and vulnerable in addition to getting essential groceries to them, and for those that are able to make it to the store in person, the social interaction, albeit short, with colleagues cannot be underestimated. The conversation that an elderly or vulnerable customer has with a colleague in a convenience store may well be the only social interaction they have that day.

Most Positive Impact on House Prices



The provision of local services is one of the most important considerations for people when purchasing a new home, with areas that feature a wide range of positively thought of services having a knock on effect on house prices (often referred to as the 'Waitrose effect'). Despite the movement online of many services, it's striking that consumers are still looking for physical service providers like the Post Office and banks, as well as local food and grocery stores. Figures from the 2020 Local Shop Report show that more than one in five (22%) people visit their local convenience store every day, which will become even more important as people move to a hybrid working pattern.

Most Wanted Services

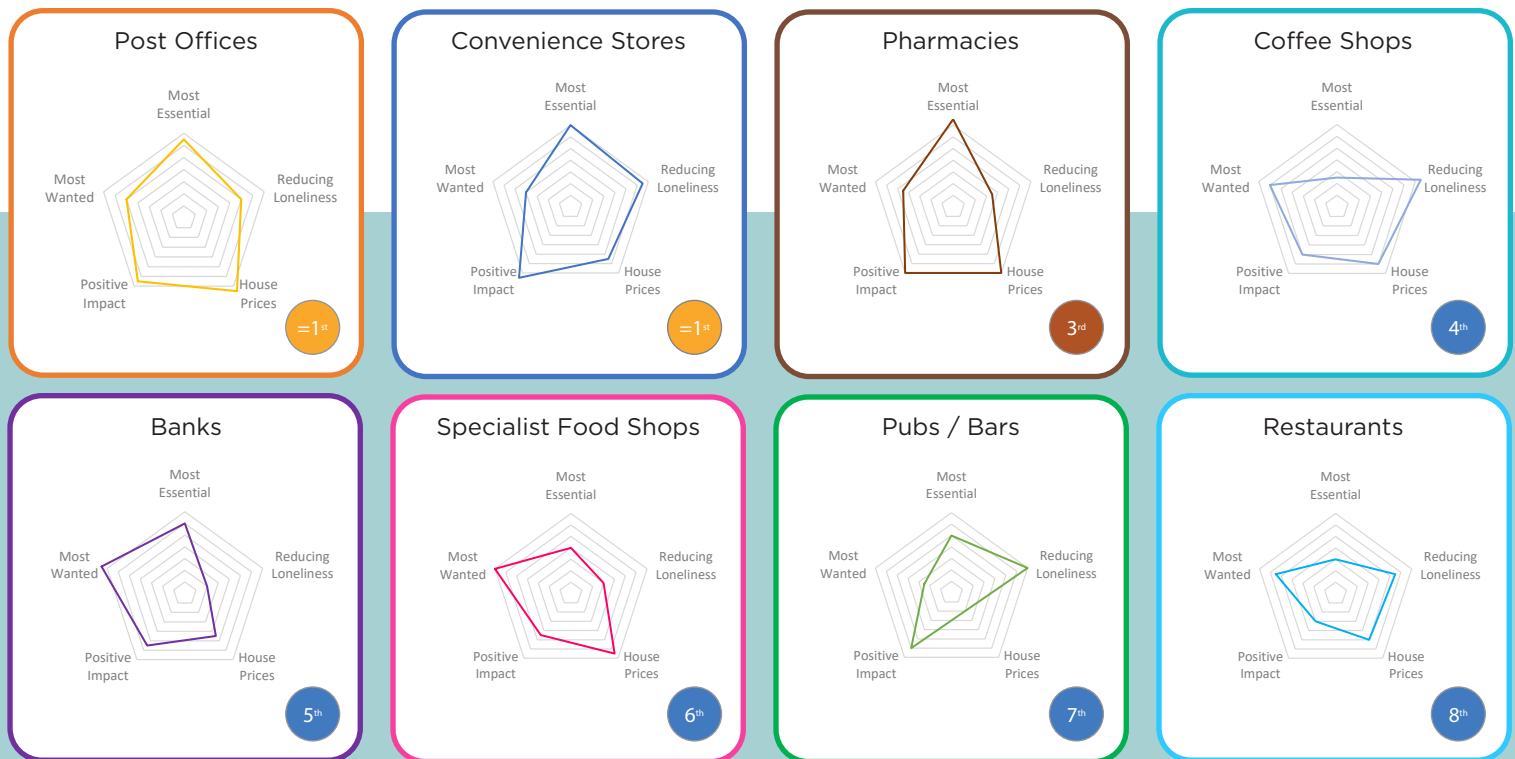


The Most Wanted metric looks at whether consumers want more or less of a service in their local communities. For those services that are well-thought of but also well-provisioned across communities, such as convenience stores (there are over 46,000 stores covering almost every area of the UK), consumers are likely to rank them in the middle of the pack.

It is unsurprising to see that the services that are diminishing in number taking up the top three spots in the Most Wanted rankings. The reduction in the number of banks and specialist stores in recent years has been well documented, but it's important to recognise consumers' continued desire to have banks and banking services available near them, despite the availability of those services online.

Summary: Comparing Services

The Community Barometer provides more detail on the overall ranking of each of the top eight services below. Each service has been ranked from 1-16 on the five key survey questions and then mapped to provide a snapshot of the comparative significance of that service to local consumers.



About ACS

The Association of Convenience Stores is the voice of over 33,500 local shops, supporting its members through effective lobbying, comprehensive advice and innovative networking opportunities. ACS' core purpose is to lobby Government on the issues that make a difference to local shops.

For more information about the Community Barometer, please contact Rosie Wiggins at Rosie.Wiggins@acs.org.uk or on 01252 515001