



COMMUNITY BAROMETER 2017



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INTRODUCTION

Local shops come in all kinds of shapes and sizes, but one thing they have in common is that they are a focal point for their local community. Those communities are usually based around the places where people live, but they can also be based around work or the daily commute. Understanding how people feel about their local shops and services tells us something about how they feel about the communities where they live.

That is why the Association of Convenience Stores has produced the Community Barometer. It provides new insight into the provision of shops and other local commercial services and how people feel about them. The insights are generated by looking at three different viewpoints, those of:

- Consumers (the general public)
- Retailers
- Local councillors

By comparing how these three different groups feel about the provision of services available close to where they live, what they would like more or less of, and what they want to see done to support shops and service provision in their local area; we have generated insights that should inform decision making in national and local government, as well as helping retailers as they consider how to make investments in their business in new services for their local customers.

More details on how the data was gathered is available on p7.

PROVISION / NEED FOR SERVICES

When asked about whether there are enough outlets providing different services within ten minutes of their home, the top services that consumers and councillors feel they have a good amount of are:

- Convenience stores (1st)
- Pharmacies (2nd)
- Pubs/Bars (3rd)

Even though consumers and councillors say these services are well-provided for locally, they still want to see more of them, with the balance of respondents saying they think it would benefit the local community for more of these outlets to be available.

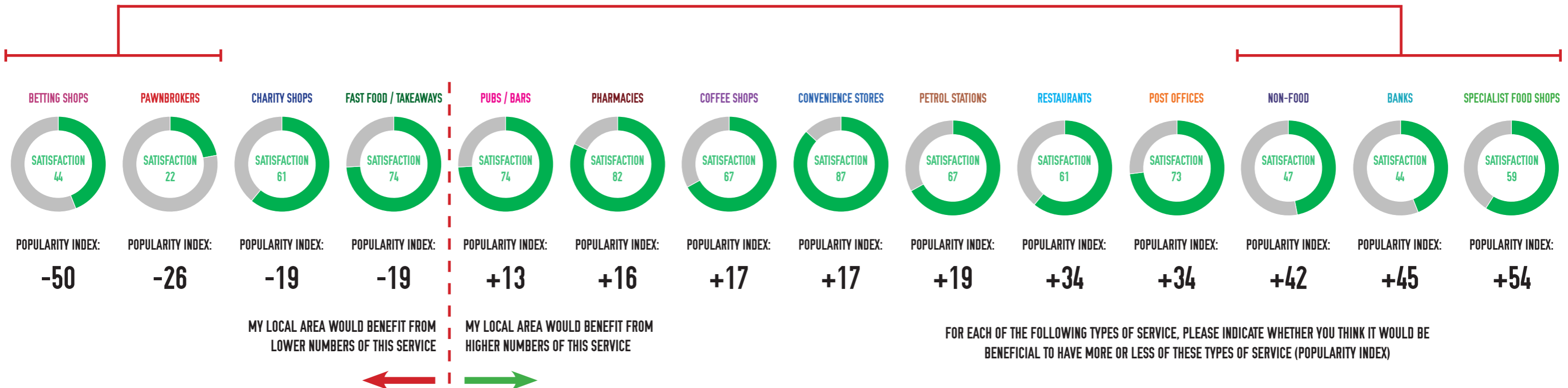
There are other types of outlets like banks and non-food stores where consumers and councillors are underwhelmed with the existing provision of these businesses, and really want to see more of them.

Specialist food shops are the most popular in terms of local people wanting to see more of them, and also score high on the satisfaction ratings for the number of these outlets currently available.

There are some outlets that consumers and councillors want to see less of in their local area, notably betting shops and pawnbrokers.

HOW SATISFIED ARE YOU WITH THE PROVISION OF EACH OF THE FOLLOWING TYPES OF SERVICE WITHIN TEN MINUTES WALK OF YOUR HOME? (SATISFACTION)

LEAST SATISFIED WITH THE CURRENT PROVISION OF THESE SERVICES (BOTTOM FIVE)



LOCAL IMPACT

For the third year running, Post Offices are seen to have the most positive impact on local communities, followed closely by convenience stores and specialist food shops. Over recent years, more convenience stores have been including post office services as part of their overall offering, as well as developing things like deli counters and fresh meat from local suppliers (bridging the gap left by the declining presence of specialist food stores in communities).

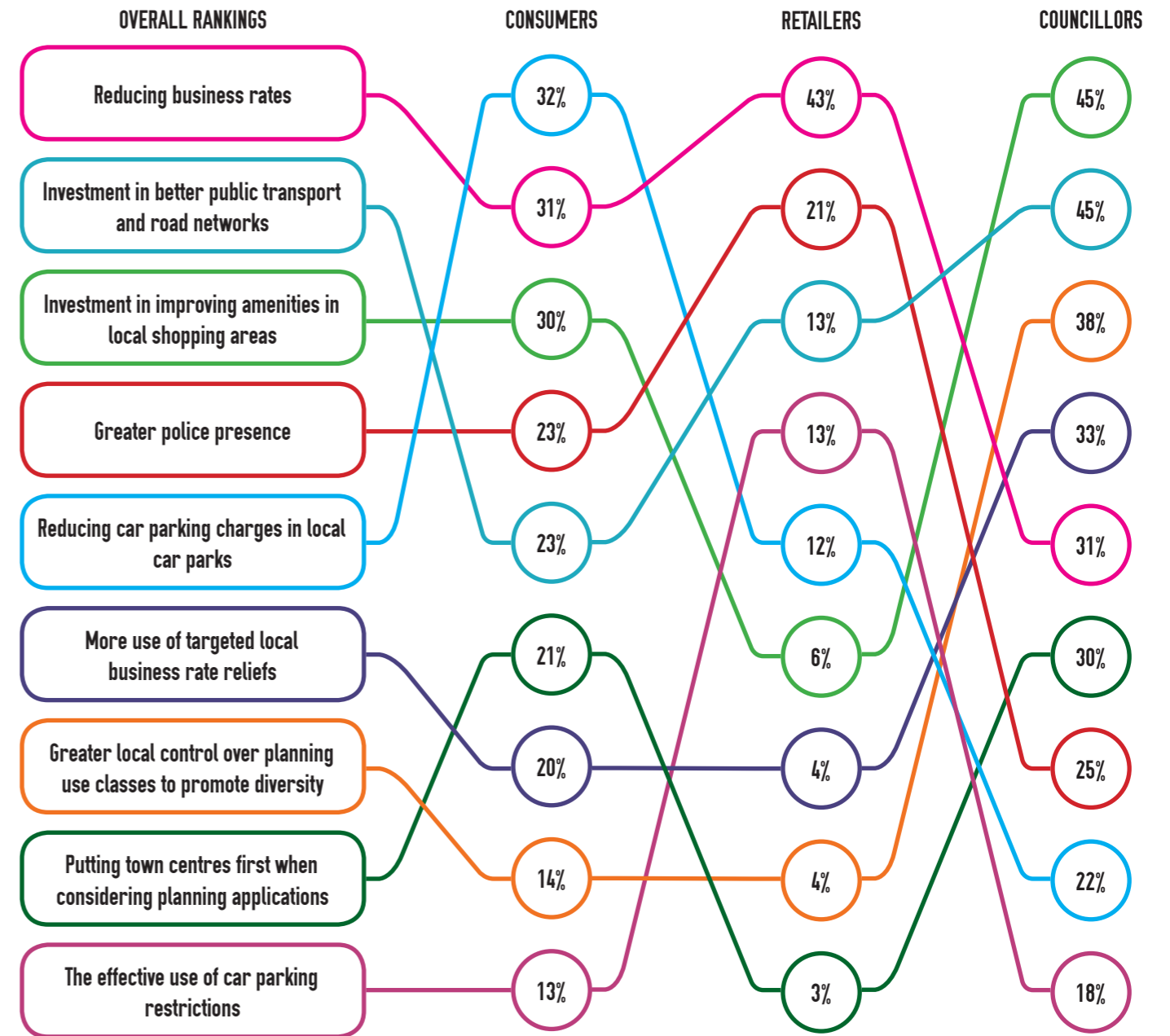
The views of consumers and councillors are broadly similar in terms of their ranking of each type of service, although there is some discrepancy when it comes to the impact of charity shops. Consumers hold charity shops in higher regard than councillors, perhaps due to the heavy discounts that charity shops receive compared with other business types.

WHICH OF THE FOLLOWING SERVICES HAS THE MOST POSITIVE IMPACT IN YOUR LOCAL AREA?*



*Participants were asked to choose **up to three** options for the services that have the most positive impact in their local area.

WHICH OF THE FOLLOWING POLICIES SUPPORTING LOCAL SHOPS SHOULD BE A PRIORITY IN YOUR AREA?*



*Participants were asked to choose **up to three** options for the services that have the most positive impact in their local area.

POLICY PRIORITIES

For the third year running, the top priority for retailers is a reduction in business rates. ACS research indicates that 30% of retailers experienced an increase in their business rates as a result of the 2017 revaluation, with some seeing increases in their bills of 100% or more. While 31% of councillors believed that reducing rates should be a priority, investment in public transport and improving local amenities are seen as higher priority areas.

The area where there is the most significant difference of opinion between the three groups is on reducing car parking charges locally. Consumers view this as the most important area, while this is the second least important area for councillors.

21% of retailers believe that a greater police presence should be a priority in their area. ACS research shows that 71% of retailers are not happy with the consistency of police response to incidents of crime.

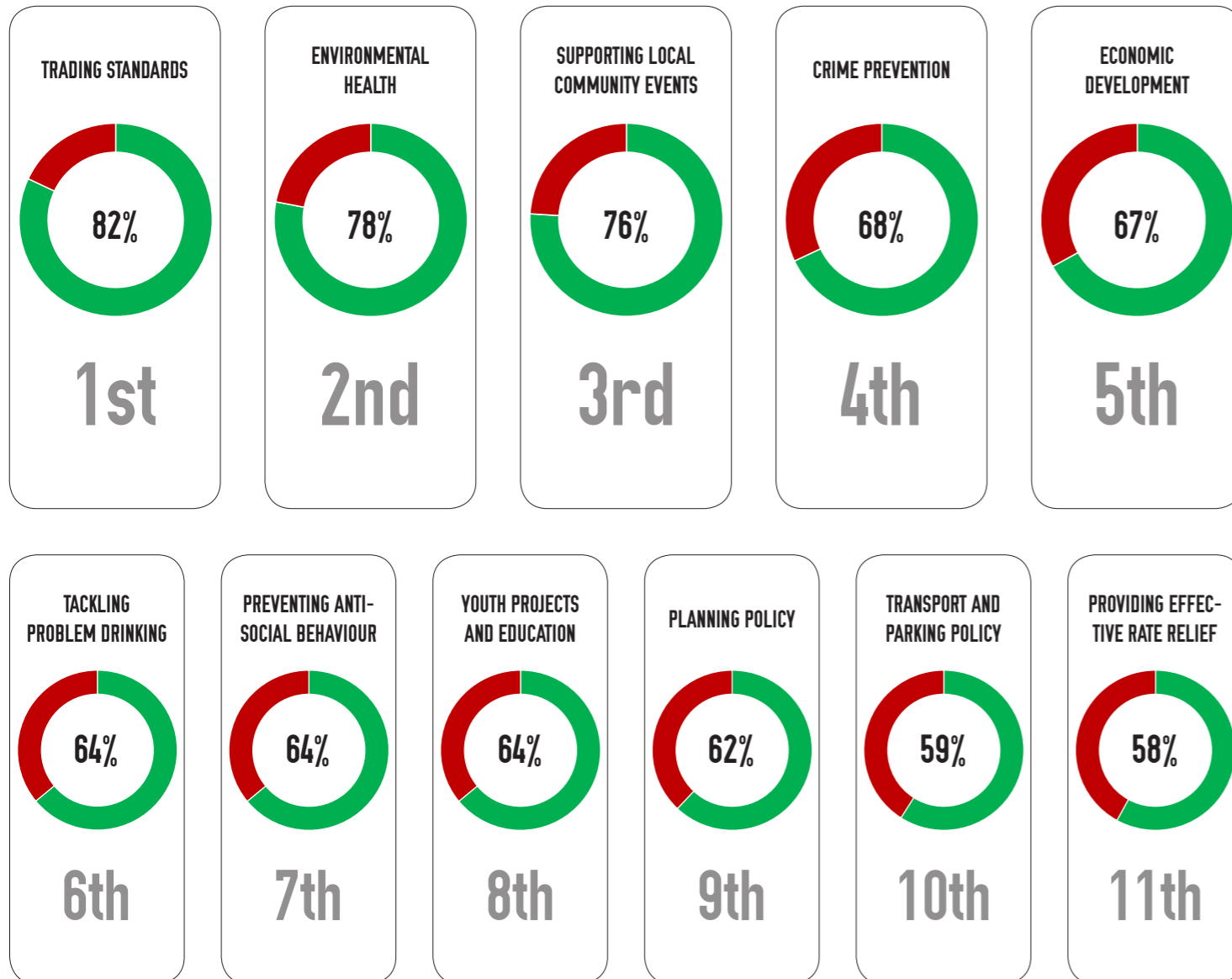
COUNCIL PERFORMANCE

All groups appear to be most satisfied with the performance of enforcement officers in their area (trading standards and environmental health), with consumers and councillors rating council performance worst in supporting businesses with rate relief. This tallies with wider concerns elsewhere in the survey about the impact of business rates.

Councillors tend to rate their own council's performance across all areas more positively than their residents or local business owners. This is particularly evident for tackling problem drinking (66% positive for councillors compared to 51% for consumers) and local economic development (74% positive for councillors compared to 54% for consumers).

Across all areas, council performance has improved slightly on 2016's numbers.

HOW WOULD YOU RATE YOUR COUNCIL'S PERFORMANCE IN THE FOLLOWING AREAS?



METHODOLOGY

The ACS Community Barometer consists of the following five questions:

Question 1: How satisfied are you with the provision of each of the following types of services in the area within ten minutes walk of your home?

(Very satisfied / Fairly satisfied / Fairly unsatisfied / very unsatisfied / Don't know)

Options: Post offices / Specialist food shops (e.g. butchers, bakery) / Restaurants / Coffee shops or cafes / Banks / Convenience stores or other local shops / Pubs or bars / Fast food outlets or takeaways / Betting shops / Pawnbrokers / Charity shops / Pharmacies / Petrol Stations / Non-food (e.g. clothing, electrical, hardware etc)

Question 2: 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 numbers should remain roughly the same? (More / The same / Less / Don't know)

Options: Post offices / Specialist food shops (e.g. butchers, bakery) / Restaurants / Coffee shops or cafes / Banks / Convenience stores or other local shops / Pubs or bars / Fast food outlets or takeaways / Betting shops / Pawnbrokers / Charity shops / Pharmacies / Petrol Stations / Non-food (e.g. clothing, electrical, hardware etc)

Question 3: Which of the following types of services do you believe have the most positive impact on your local area?

Options: Post offices / Specialist food shops (e.g. butchers, bakery) / Restaurants / Coffee shops or cafes / Banks / Convenience stores or other local shops / Pubs or bars / Fast food outlets or takeaways / Betting shops / Pawnbrokers / Charity shops / Pharmacies / Petrol Stations / Non-food (e.g. clothing, electrical, hardware etc)

Question 4: Which of the following policies supporting local shops should be a priority in your area?

Options: Greater local control over planning use classes to promote business diversity / Investment in better public transport and road networks / Investment in improving amenities in local shopping areas / Putting town centres first when considering planning applications / Reduction in business rates / More use of targeted local business rate reliefs/ Reduction in car parking charges in local car parks / The effective use of car parking restrictions / Greater police presence/ None of the above / Don't know

Question 5: How would you rate your council's performance in the following areas? (Very good / Fairly good / Fairly poor / Very poor)

Options: Planning policy / Crime prevention / Local economic development / Preventing anti-social behaviour / Youth projects and education / Supporting local community events / Tackling problem drinking/ Transport and parking policy/ Environmental health/ Trading Standards/ Providing effective targeted local rate relief



Councillors: ComRes surveyed 438 local councillors in Great Britain using a combination of paper and online surveys. The fieldwork was conducted between the 19th April and 28th June 2017. Data has been weighted by party and region to be representative of all councillors in Britain. With a sample size of 438 councillors, the margin of error on results at a 95% confidence level is $\pm 4.63\%$. Differences of less than this should be treated as indicative.



Consumers: Populus surveyed a nationally representative online sample of 2,080 UK adults aged 18+, between 14th and 15th June 2017.



Retailers: Polling was conducted as part of the Voice of Local Shops survey collected for ACS by him! – It is a three-monthly survey of 1210 local shop owners trading in convenience stores either as standalone independents or as part of a symbol group. Telephone interviews were undertaken with the symbol and independent convenience store owners in the UK. Researchers interviewed 110 retailers in each of 9 English Regions, 110 in Scotland and 110 in Wales. Telephone interviews were conducted by him! in association with BCC Marketing, a MRS accredited research agency during May 2017.

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, supported by an expanding research programme designed to discover new information about the convenience sector which can be used to inform decision making both in Government and with those involved directly in the success of convenience stores across the UK.

More information about ACS can be found at www.acs.org.uk



Full data tables can be found online at
www.acs.org.uk/communitybarometer



For more details on ACS:

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