Rural Study: Rural Ayrshire and the Isles of Arran & Cumbraes (Annex – B)

Report for South Ayrshire Council

Prepared by

In collaboration with

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Socio-Economic Statistics and Analysis

1. Introduction

This Annex presents the statistical analysis of the rural area of North, East and South Ayrshire which has been conducted in relation to the 'Rural Study: Rural Ayrshire and the Isles of Arran & Cumbraes'. The study has been commissioned by South Ayrshire Council.

This report presents the detailed findings of the socio-economic review of available data from sources such as the Scottish National Statistics (SNS), the Scottish Index of Multiple Deprivation (SIMD), Scottish Household Survey, Annual Population Survey, NOMIS (Office of National Statistics), Annual Business Inquiry (ABI), Scottish Census Results On Line (SCROL), and others.

As the current Census data (2011) is unavailable in Scotland, we needed to present data from the 2001 Census.

In addition, our research has included a comparator LEADER area (Forth Valley and Lomond LEADER). In order not to present an over-complex analysis, we have added the comparative analysis as a separate chapter of this Annex.

A summary of the key findings of the statistical analysis is presented in the main body of the 'Rural Study' report.

1.1 Area Definition

The statistical analysis has been undertaken at a number of levels to reflect the various geographical and thematic characteristics of the study area including the differences in defining rural Scotland.

Scottish Government Definition of Rural Scotland and LEADER

The Scottish Government urban rural classification system contains a number of increasingly refined definitions of the urban and rural areas in Scotland.

Based on the three-fold urban/rural definition, 'rural' is defined as any settlement with a population of less than 3,000. By analysing drive times to larger settlements this is further divided into:

- Accessible rural: those with a less than 30 minute drive time to the nearest settlement with a population of 10,000 or more;
- Remote rural: those with a greater than 30 minute drive time to the nearest settlement with a population of 10,000 or more.

However, the areas included in the LEADER Programme go further than the 'accessible and remote rural' definitions. The European Commission defines LEADER areas as any settlement up to 10,000 population. This coincides with the six-fold Scottish urban rural definition[1] whereby remote and accessible towns are also deemed to be 'rural'.

- Accessible Small Towns: Settlements of between 3,000 and 10,000 people and within 30 minutes drive of a settlement of 10,000 or more; and
- Remote Small Towns: Settlements of between 3,000 and 10,000 people and with a drive time of over 30 minutes to a settlement of 10,000 or more.

In addition, the eligibility for LEADER (Axis 4 funding under the SRDP) is slightly more flexible as it accepts even towns with more than 10,000 inhabitants (Other Urban Towns – according to the six-fold Scottish urban rural definition) if the geographic and thematic justification is made for their inclusion into the respective LEADER area (in the case of Ayrshire LEADER there are 18 'other urban' datazones).

Study Area

In order to maintain a broad understanding of the rural area in Ayrshire, the analysis has been undertaken for rural (accessible and remote rural areas with less than 3,000 population), LEADER (rural, towns, and other urban areas) as well as urban areas within each of the three local authority areas within Ayrshire:

- North Ayrshire;

- East Ayrshire; and
- South Ayrshire.

To determine the rural/LEADER/urban split each local authority has been analysed at datazone[2] level. In total, Ayrshire is made up of 480 datazones: 179 in North Ayrshire; 154 in East Ayrshire and 147 in South Ayrshire.

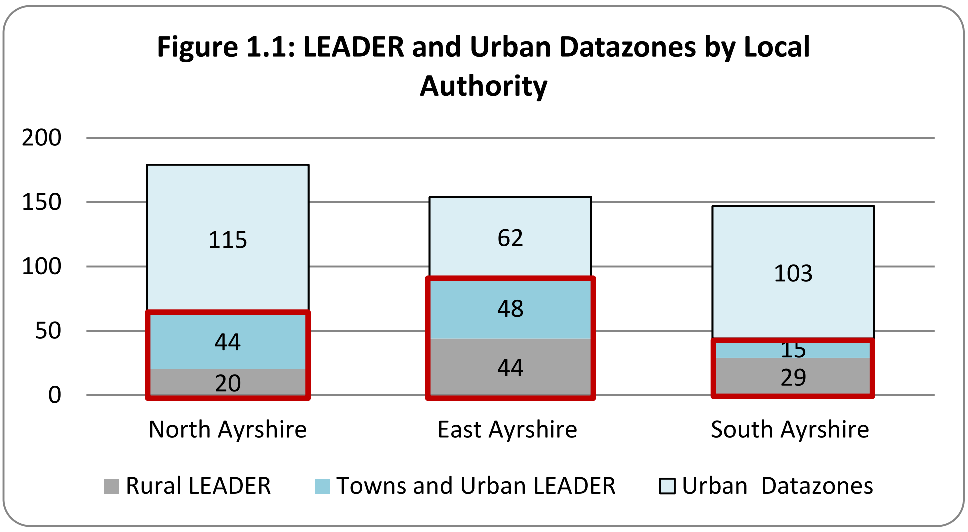
The datazones for each local authority area have then been grouped in terms of the urban/rural definition (see above) and the LEADER area. **Table 2.1** details the breakdown of local authority area.

Table 1.1: Local Authority by Urban/Rural/LEADER Split

	Rural (accessible and remote)	LEADER (inclusive of rural, towns and urban datazones)	Urban (towns and urban)	Total
North Ayrshire	20	64	159	**179**
East Ayrshire	44	92	110	**154**
South Ayrshire	29	44	118	**147**
Total Ayrshire	**93**	**200**	**387**	**480**

Source: Scottish Government Urban Rural Classification

Figure 1.1 provides a visual representation of the LEADER area and the extent to which the area also includes towns and urban areas. The LEADER area is outlined in red.



Source: Scottish Neighbourhood Statistics (SNS)

[2] "Data zones are groups of 2001 Census output areas and have populations of between 500 and 1,000 household residents. Where possible, they have been made to respect physical boundaries and natural communities" Scottish Government.

2. Demographics

Population

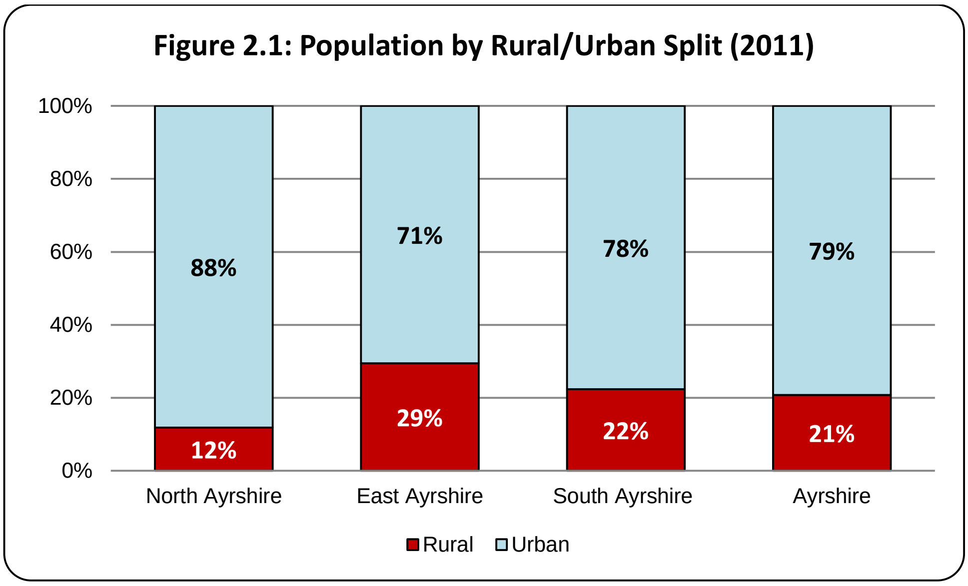
The total Ayrshire population in 2011 of 366,890 accounted for 6.4% of the total population in Scotland. Although the distribution of the population across the three local authorities is relatively even, North Ayrshire is the largest local authority area with 135,130 residents accounting for 37% of Ayrshire's total population, **Table 2.1.**.

Table 2.1: Population (2011)

	Population	As a % of Total Ayrshire Population
North Ayrshire	135,130	37%
East Ayrshire	120,200	33%
South Ayrshire	111,560	30%
Total Ayrshire	**336,890**	**100%**

Source: SNS – mid year population estimate

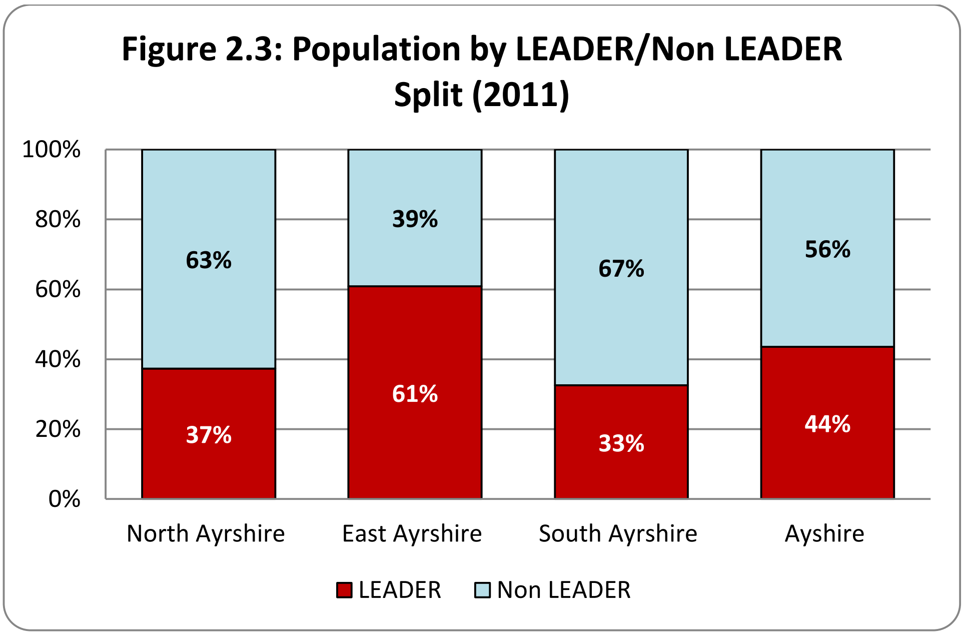
Each local authority area population has been further split into rural (accessible and remote) and urban (including towns) locations, as **Figure 2.1** shows.



Source: SNS – mid year population estimate

Although North Ayrshire has the largest overall population it has the lowest rural population out of the three local authority areas, 16,075 (12% of its overall population), compared with 35,435 (22%) and 24,167 (29%) for East and South Ayrshire respectively.

When analysis is undertaken for the LEADER area (including small towns and some 'other urban' areas), the population split alters as shown in **Figure 2.2**. Most noticeably the East Ayrshire rural area as defined by LEADER significantly increases by one third to 61%. Whereas in South Ayrshire the inclusion of small towns and other urban areas is fairly small and the LEADER area is 11% larger in population than the accessible and remote rural area. This indicates a relatively strong concentration (67%) of urban population in this local authority.



Source: SNS – mid year population estimate

Population Composition (Gender and Age)

The gender composition for each of the Local Authority areas is in line with the national average of 48% male and 52% female although the rural areas in Ayrshire show a slightly higher percentage of male population than the Scottish average, **Table 2.2 and 2.3** (over).

Table 2.2: Gender (2011)

	Male	Female
Rural North Ayrshire	49%	51%
Rural East Ayrshire	50%	50%
Rural South Ayrshire	49%	51%
LEADER N Ayrshire	48%	52%
LEADER E Ayrshire	48%	52%
LEADER S Ayrshire	49%	51%
North Ayrshire	47%	53%
East Ayrshire	48%	52%
South Ayrshire	48%	52%
Scotland	**48%**	**52%**

Source: SNS – mid year population estimate

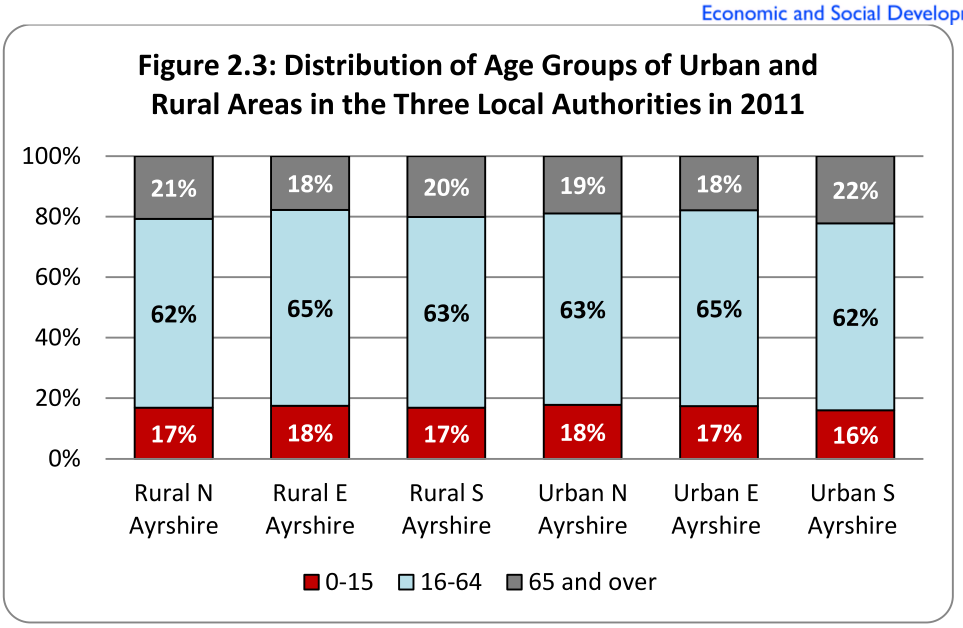
Table 2.3: Gender (2011)

	Male	Female
Total Rural Ayrshire	49%	51%
LEADER Ayrshire	48%	52%

Source: SNS – mid year population estimate

In terms of age distribution, the Scottish population presented a 17%, 66%, 17% split of the three age groups (0-15, 16-64 and 65 and over). The rural areas of Ayrshire are similar to the national and local authority averages although with a slightly higher proportion of over 65 year olds due to a slightly smaller percentage of working age population.

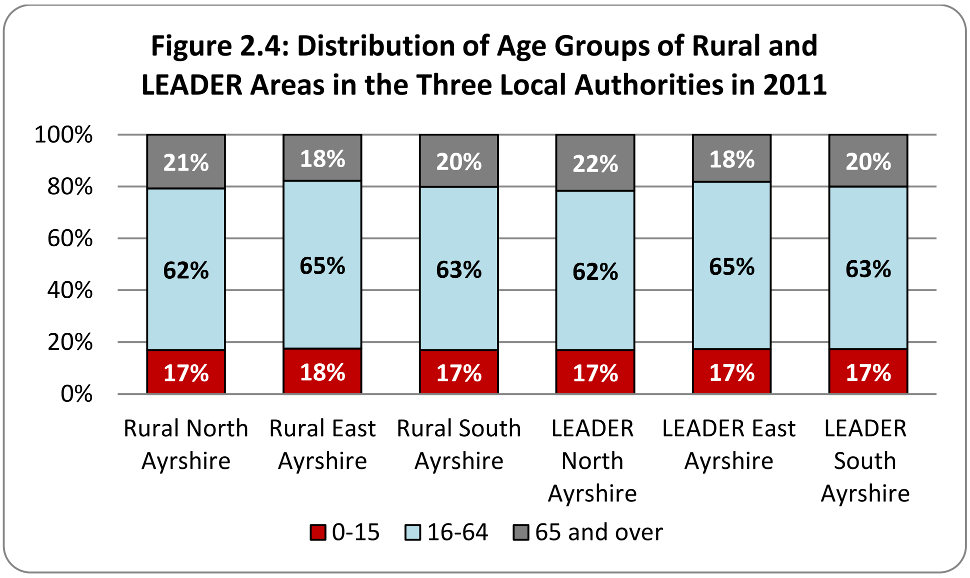
Figure 2.3 (over) illustrates how the rural and urban areas compare in their age distribution across the three local authority areas in Ayrshire.



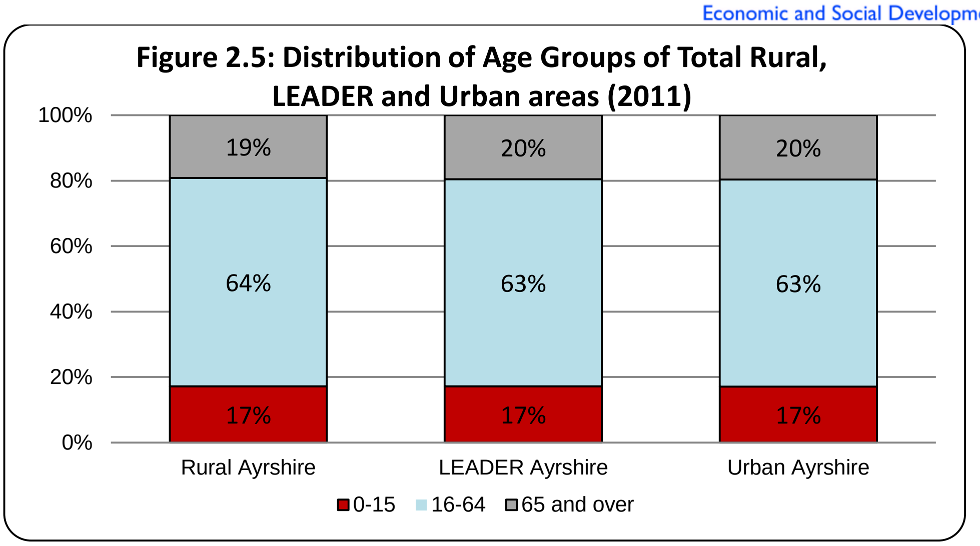
Source: SNS – mid year population estimate

Figure 2.3 shows that the distribution of age groups between rural and urban areas is not significantly different in any of the three local authorities. Only in rural North Ayrshire, there is a slightly higher percentage of 65 year olds and over (21%) than in its urban counterpart (19%).

Rural and LEADER age distribution follows the same distribution pattern, with the working age population ranging from 62% to 65% of the total population (slightly below the Scottish average of 66%), **Figure 2.4**.



Source: SNS



Source: SNS

Focussing on a more detailed age composition of the rural Ayrshire and the LEADER area, **Figure 2.6** shows the distribution across a more detailed range of age groups.

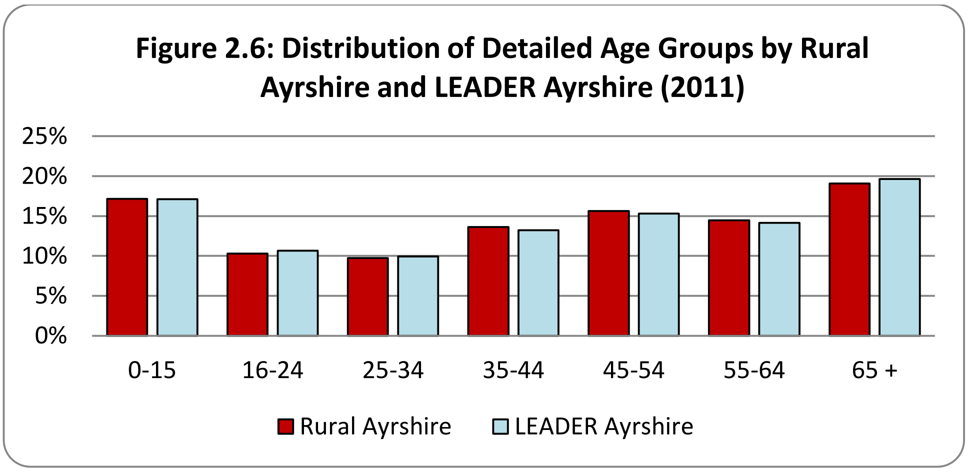


Figure 2.7, **2.8 and 2.9** (over) show the detailed age groups for each local authority area by their rural, LEADER and urban areas. The comparison shows that the age profiles of the three rural and LEADER areas are fairly similar.

Figure 2.7: Distribution of Detailed Age Groups across the Rural Areas of Ayrshire Local Authorities (2011)

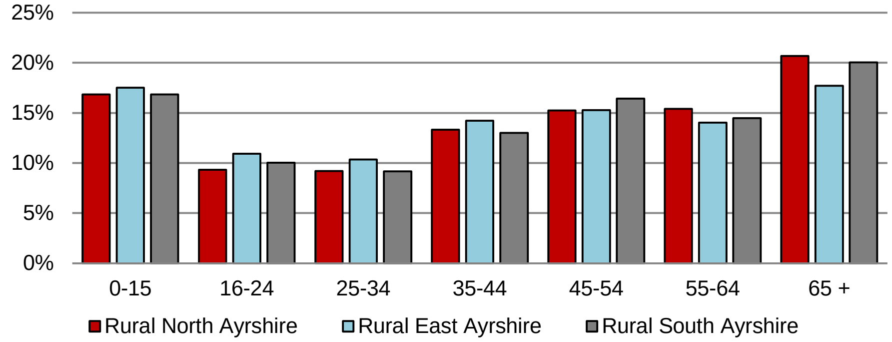


Figure 2.8: Distribution of Detailed Age Groups across the LEADER Areas of Local Authorities (2011)

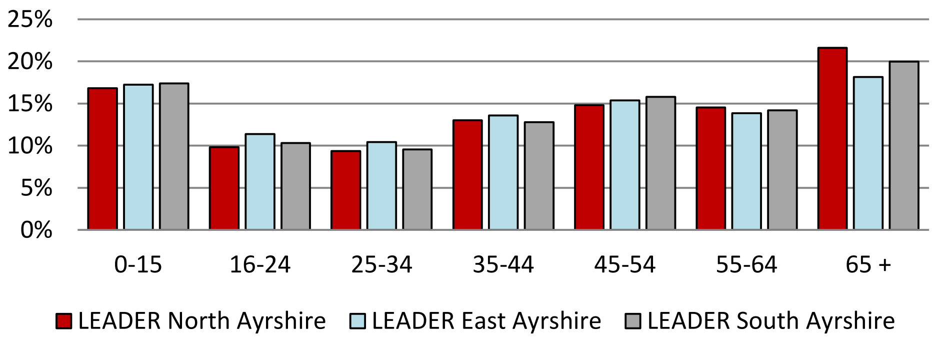
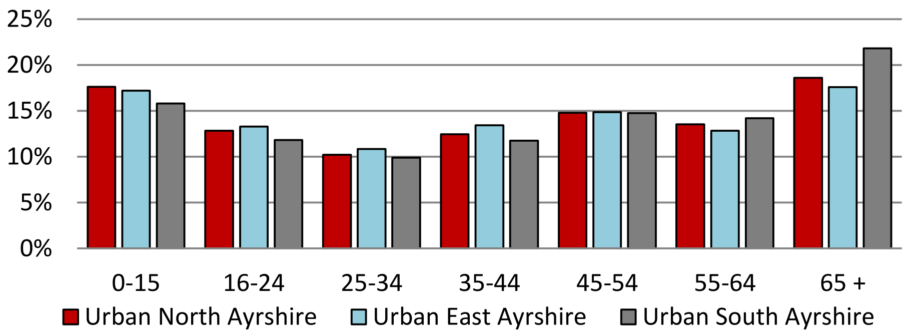


Figure 2.9: Distribution of Detailed Age Groups across the Urban Areas of Ayrshire Local Authorities (2011)



Source: SNS – mid year population estimate (Figure 2.6. to 2.8)

Those aged 65 and over account for the largest percentage of the population across all three local authorities for rural, LEADER and urban areas. At the same time, the youngest age group 0-15 year olds is the second largest group, whereas the age groups of young adults (16-24 and 25-34) represent the smallest groups in all rural, LEADER and urban areas.

The distribution in the respective urban areas is very similar, apart from a slightly larger percentage of 16-24 year olds residing in urban than in the rural areas as **Figure 2.7** to **Figure 2.9** illustrate.

Population Trend

Although the population change of the three local authorities in Ayrshire has been relatively stable (slight decline of up to -1% in South Ayrshire), the population throughout the rural and LEADER areas of Ayrshire have experienced growth over the ten years between 2001 and 2011. The rural areas, and particularly the rural area of North Ayrshire, have experienced a substantial increase of almost one fifth (18%) during this time as **Table 2.4 and 2.5** indicate.

Table 2.4: Total Population Trend 2001-2011

	2001	2011	Change	% Change
Rural N Ayrshire	13,658	16,075	2,417	18%
Rural E Ayrshire	32,899	35,435	2,536	8%
Rural S Ayrshire	23,561	24,972	1,411	6%
LEADER N Ayrshire	47,620	50,476	2,856	6%
LEADER E Ayrshire	72,422	73,191	769	1%
LEADER S Ayrshire	34,974	36,297	1,323	4%
N Ayrshire	135,800	135,200	-600	-0.4%
E Ayrshire	120,300	120,200	-100	-0.1%
S Ayrshire	112,200	111,600	-600	-1%
Scotland	5,064,200	5,254,800	190,600	4%

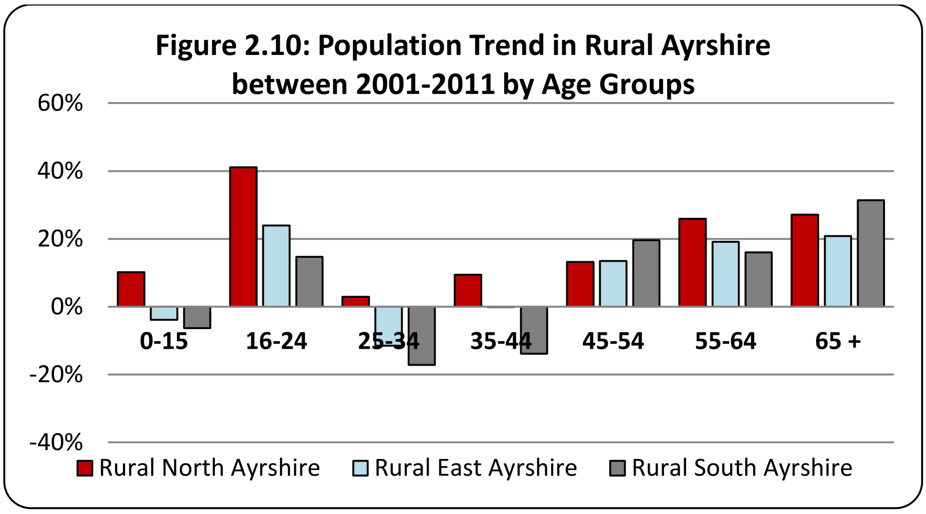
Source: SNS – mid year population estimate

Table 2.5: Total Rural and LEADER Population Trend 2001-2011

	2001	2011	Change	% Change
Rural Ayrshire	70,118	76,482	6,364	9%
LEADER Ayrshire	155,016	159,964	4,948	3%

Source: SNS – mid year population estimate

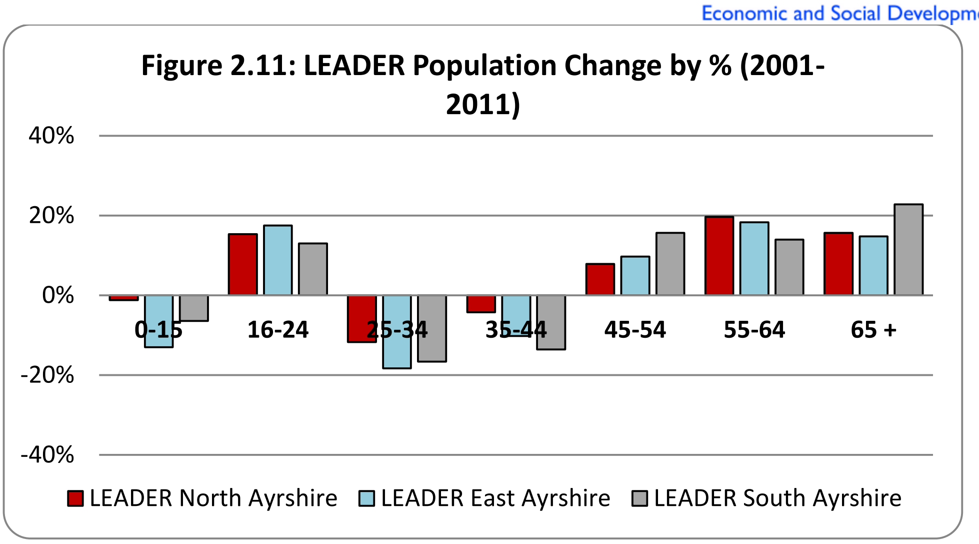
Figure 2.10 and Figure 2.11 details the trends in age groups in rural and LEADER areas.



Source: SNS – mid year population estimate

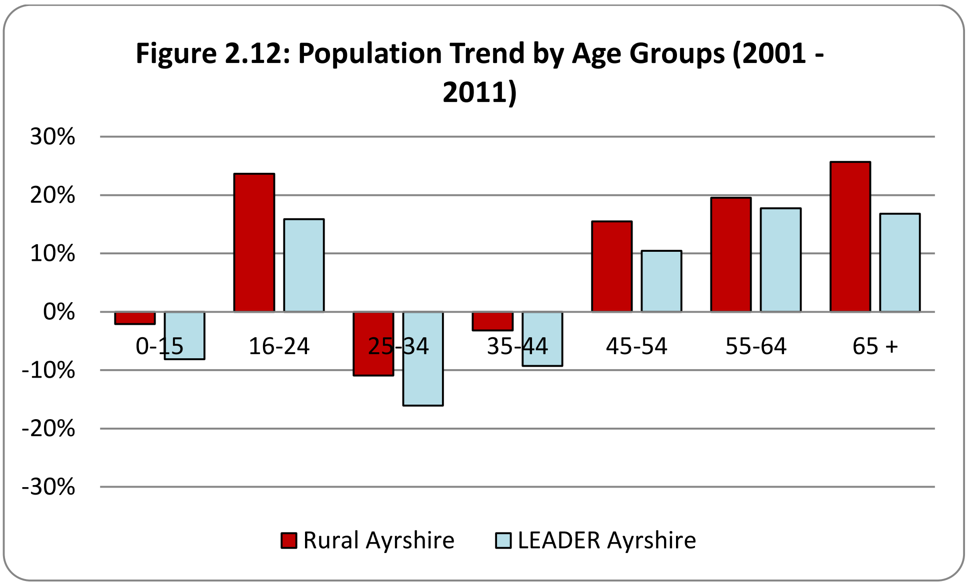
Figure 2.10 illustrates that particularly rural North Ayrshire has experienced an increase across all age groups between 2001 and 2011. This is most noticeable by the increase of circa 40% for those aged 16-24. Although the 16-24 year olds have also increased in rural East and South Ayrshire (24% and 15% respectively), their other young age groups (0-15, 16-24 and 25-34) have declined.

The population trends of the LEADER area are similar to the rural areas as shown in **Figure 2.11**. The main difference being that not only East and South Ayrshire but also LEADER North Ayrshire has experienced a decrease for age groups 0-15 and 25-44, indicating that the remote and accessible towns of North Ayrshire are decreasing their numbers of young people.



Source: SNS – mid year population estimate

Figure 2.12 presents the population trend by age group for the total rural area of Ayrshire and its LEADER area.



Migration

Information regarding migration to and from areas is only available at the local authority level and above. The three Ayrshire local authorities have been compared with the national average in **Table 2.6 (over)**.

Table 2.6: Migration within Scotland by Local Authority

	2006/07	2010/11	Change	% Change
In-Migration				
North Ayrshire	4,358	3,579	-779	-18%
East Ayrshire	3,708	3,160	-548	-15%
South Ayrshire	3,916	3,484	-432	-11%
Scotland	**91,768**	**87,879**	**-3,889**	**-4%**
Out-Migration				
North Ayrshire	3,993	3,577	-416	-10%
East Ayrshire	3,409	3,264	-145	-4%
South Ayrshire	3,456	3,045	-411	-12%
Scotland	**64,957**	**60,921**	**-4,036**	**-6%**
Net Migration				
North Ayrshire	365	2	-363	-99%
East Ayrshire	299	-104	-403	-135%
South Ayrshire	460	439	-21	-5%
Scotland	**26,811**	**26,958**	**147**	**1%**

Source: Local Area Migration (2011)

Between the 2006/07 and 2010/2011, all areas in Ayrshire have experienced a decrease in both in and out migration, i.e. whilst previously between 3,400 and over 4,000 moved in or out of areas, four years later both migration directions have reduced on average by 400 people indicating reduced mobility. In percentage terms, this reduction in migration is far stronger than at the Scottish level, for example whereas in-migration has reduced by 4% in Scotland, in North Ayrshire the equivalent value is 18%. Only in terms of negative change in out-migration, East Ayrshire is below the Scottish average.

In terms of net migration, in 2006/07 all three local authorities registered a positive net-migration between 299 and 460 more people migrating into the area than out. This changed in 2010/2011, whereby North, and East Ayrshire reported a significant drop in net migration (-99% and -135%, respectively). In the case of East Ayrshire, there are now 104 more people moving out of the area than in. Despite a 5% decline since 2006/07, South Ayrshire still reports a positive net-migration of 439.

Ethnic Groups

For ethnic groups, information is only available at local authority and national level, it should also be noted that the information is taken from the 2001 census. **Table 2.6** details all three Ayrshire local authorities to be predominantly white (99.3% for each);

this is 1.3 percentage points higher than the national average. There seems to be a particularly lower percentage of Pakistani and other South Asian ethnic groups living in Ayrshire (between 0.1% and 0.2 %) than compared to the Scottish average of 0.8%.

Table 2.7: Ethnic Groups by Local Authority/National Level by Five Category Classification

	White	Indian	Pakistani and other South Asian	Chinese	Other
East Ayrshire	99.3%	0.1%	0.2%	0.2%	0.2%
North Ayrshire	99.3%	0.2%	0.1%	0.2%	0.2%
South Ayrshire	99.3%	0.2%	0.1%	0.2%	0.2%
Scotland	**98%**	**0.3%**	**0.8%**	**0.3%**	**0.6%**

Source: SCROL (2001)

3. Housing

This section focuses on the housing make up of the three rural and LEADER areas within Ayrshire. It should be noted that apart from data for housing costs, information is drawn from the Census data.

Ownership

Tables 3.1 and 3.2, over, details ownership of households within the rural and LEADER area in relation to the local authority and national average.

Table 3.1: Housing Tenure (2001)

	Owned Outright	Owned Mortgage/ Loan	Shared Owner-ship	Council Rented	Private Let	Other Social	Rented from Employer	Rented from Relative	Other
Rural North Ayrshire	40%	32%	0.3%	11%	8%	4%	2%	2%	1%
Rural East Ayrshire	23%	33%	0.2%	35%	4%	3%	1%	1%	0.4%
Rural South Ayrshire	30%	38%	0.4%	20%	7%	1%	2%	1%	0.5%
LEADER North Ayrshire	33%	36%	0.3%	21%	3%	5%	1%	1%	0.4%
LEADER East Ayrshire	21%	37%	0.2%	35%	3%	3%	0.5%	1%	0.3%
LEADER South Ayrshire	29%	37%	0.3%	23%	2%	6%	1%	1%	0.4%
North Ayrshire	23%	38%	0.3%	28%	6%	4%	0.3%	1%	0.3%
East Ayrshire	20%	39%	0.2%	34%	3%	3%	0.3%	1%	0.3%
South Ayrshire	30%	40%	0.4%	21%	2%	5%	1%	1%	0.3%
Scotland	23%	39%	1%	23%	6%	6%	1%	1%	0.4%

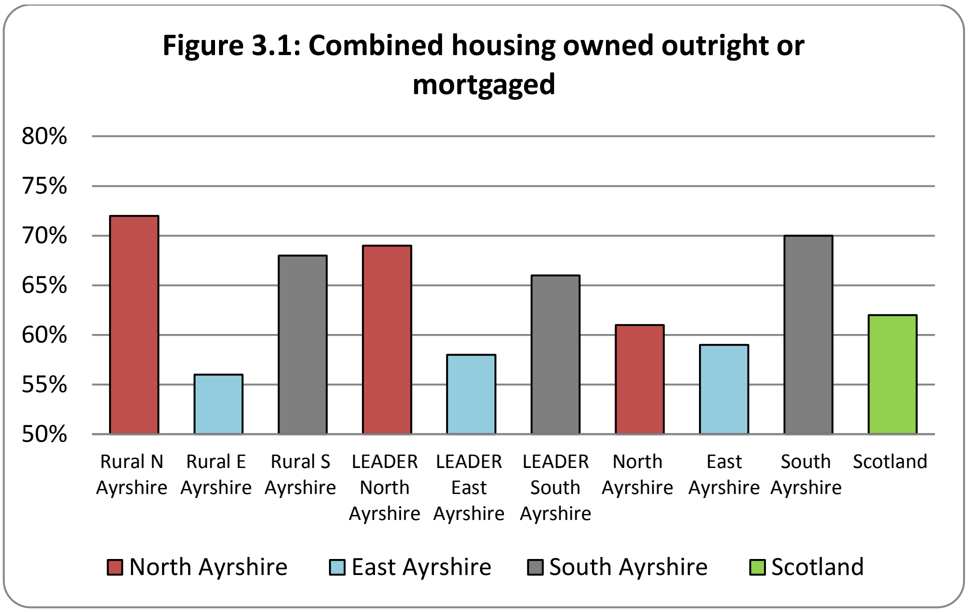
Source: SNS

Table 3.2: Housing Tenure (2001)

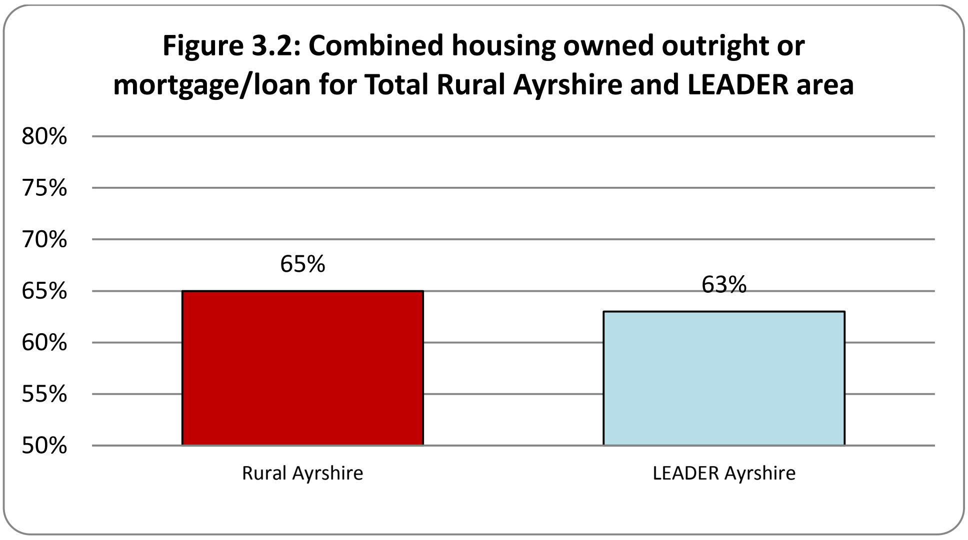
	Owned Outright	Owned Mortgage/ Loan	Shared Owner-ship	Council Rented	Private Let	Other Social	Rented from Employer	Rented from Relative	Other
Rural Ayrshire	28%	35%	0.3%	25%	3%	6%	1%	1%	1%
LEADER Ayrshire	26%	36%	0.2%	28%	3%	4%	1%	1%	0.4%

Source: SNS

The data shows that the majority of houses within the rural and LEADER areas of Ayrshire are either owned outright or by a mortgage, **Figure 3.1 and 3.2.** summarise the findings.



SNS



SNS

Rural North Ayrshire has the highest percentage with nearly three quarters of households in the rural location being owned outright or by mortgage/loan (72%) 10% higher than the national level (62%).

Rural and LEADER areas of East Ayrshire are below the local authority and national levels for housing owned outright or by a mortgage/loan. Over one third of people in all three areas (rural/LEADER and local authority) live in council rented properties.

Housing Costs

The cost of housing has significantly increased over the ten year period of 2001 to 2011 between 46% (North Ayrshire) and 50% (East Ayrshire) in line with the increases at the Scottish level (48%). The average house prices, however, throughout Ayrshire have remained below the national average as **Table 3.3** indicates. As in 2001, average house prices in 2011 are highest in South Ayrshire.

Table 3.3: Average House Prices at Local and National Level (2001-2011)

	2001	2011	% Change
North Ayrshire	£57,268	£123,185	115%
East Ayrshire	£61,058	£121,842	100%
South Ayrshire	£73,335	£152,166	107%
Total Ayrshire	£63,887	£132,398	107%
Scotland	**£78,220**	**£163,264**	**109%**

Source: SNS

Analysis has been undertaken to determine the percentage of rural and LEADER datazones below the average house price for each of the three local authorities in Ayrshire for 2001 and 2011, **Table 3.4**.

Table 3.4: Percentage of Datazones below Average Local Authority House Prices (2001-2011)

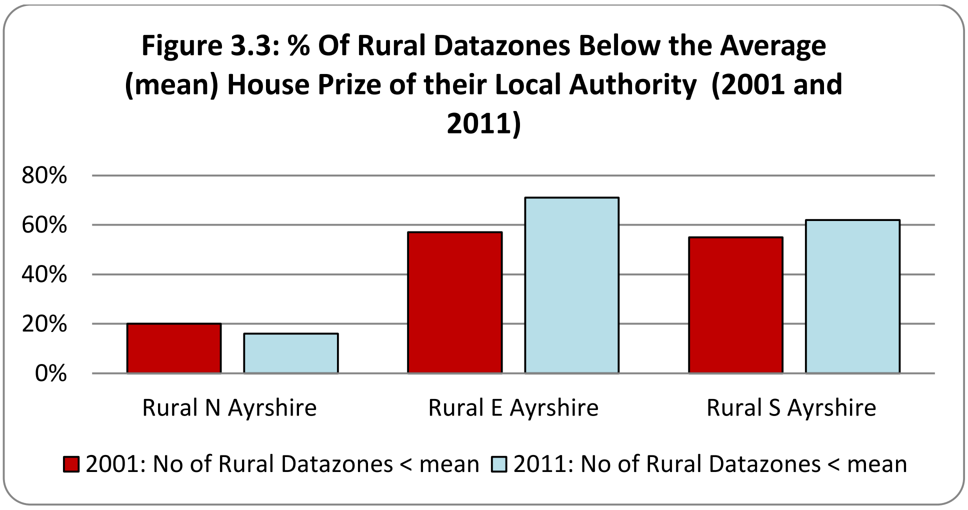
	Rural		LEADER	
	2001	**2011**	**2001**	**2011**
North Ayrshire	20%	16%	50%	48%
East Ayrshire	57%	71%	73%	75%
South Ayrshire	55%	62%	66%	70%
Total Ayrshire	**51%**	**51%**	**67%**	**66%**

Source: SNS

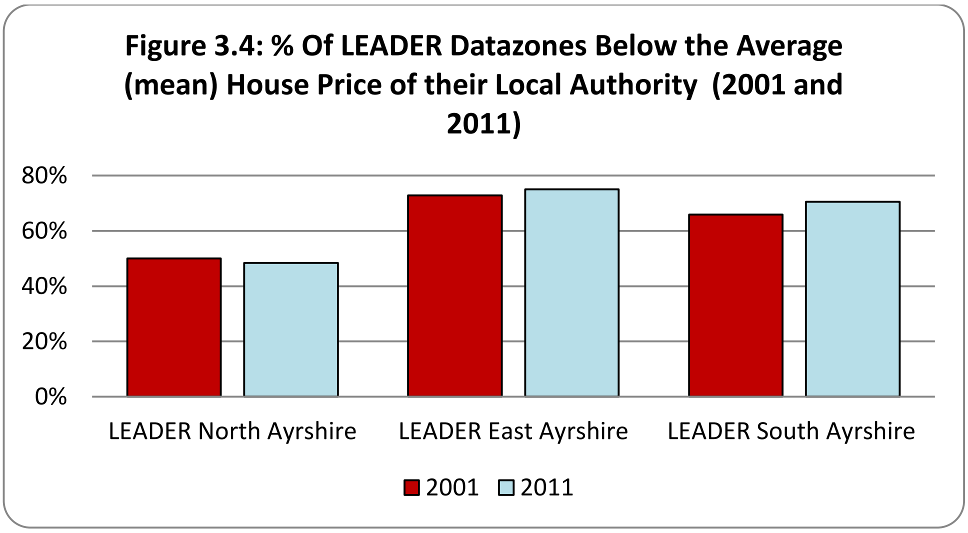
For rural areas within East and South Ayrshire over half of all house prices were below the local authority area mean price in 2001 (57% and 55% respectively). This then increased by 14% and 7% in 2011. For LEADER areas this was intensified, over two thirds of East and South Ayrshire house prices were below the mean price in 2011 (73% and 66%) however only a slight increase was experienced over the ten years.

Both areas for North Ayrshire experienced a decrease in the percentage of house prices being below the local authority mean, i.e. house prices increased within North Ayrshire.

Figure 3.3 and **3.4** visualise the findings, over.



Source: SNS

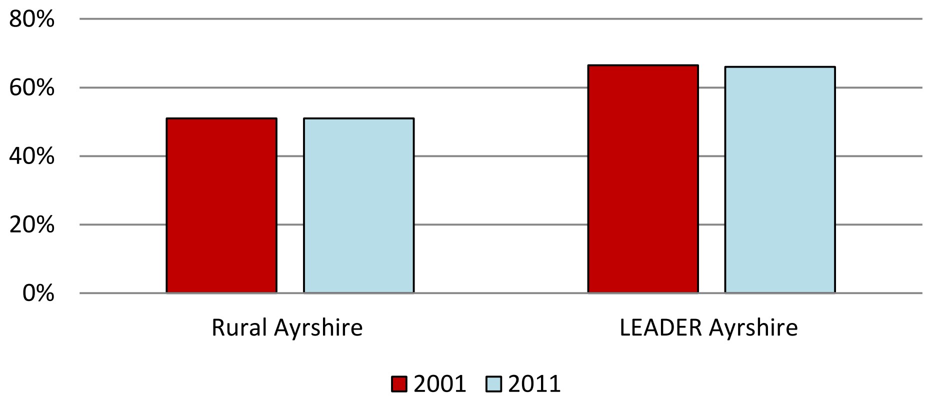


Source: SNS

Based on the mean house price of each local authority, **Figure 3.3** shows that in 2001 in North Ayrshire, four rural datazones (20% of all rural datazones) registered house prices below the local authority's average house price. This has slightly changed in 2011 where only 16%, three rural datazones, had lower than average house prices. This is in contrast to East and South Ayrshire, where a much higher percentage of their rural datazones reported below average house prices and where this situation has increased from 2001 and 2011. In 2011, 31 of 44 rural datazones in East Ayrshire and 18 of 29 rural datazones in South Ayrshire were below their local authorities' mean house prices.

Figure 3.5 shows the percentage of LEADER data zones with below average house prices in 201 and 2011. The figure shows clearly that the inclusion of small remote and accessible towns has increased the number of datazones with below average house prices substantially in the North Ayrshire case (nearly 50% of all datazones in the LEADER area). For East and South Ayrshire there has been a smaller increase around 10%.

Figure 3.5: % Of Total Rural and LEADER Datazones Below the Average (mean) House Price of their Local Authority (2001 and 2011)

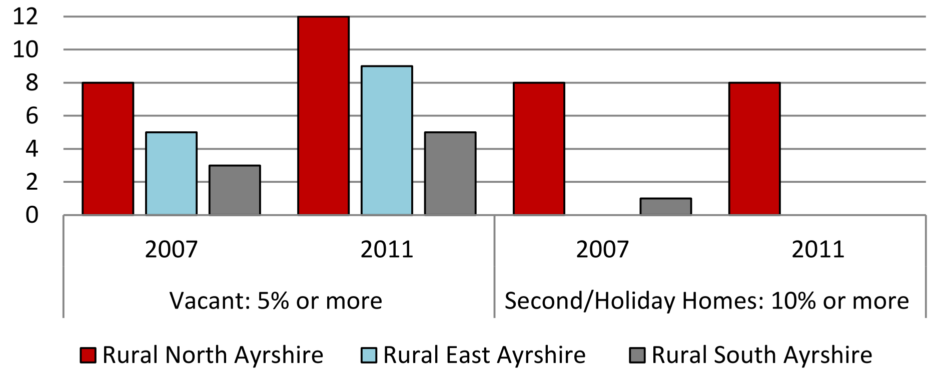


Source: SNS

Occupancy Levels

Further analysis of occupancy levels has been undertaken by determining the percentage of datazones in each location where the percentage of vacant property is 5% or more and where secondary homes represent more than 10% of houses, **Figure 3.6**.

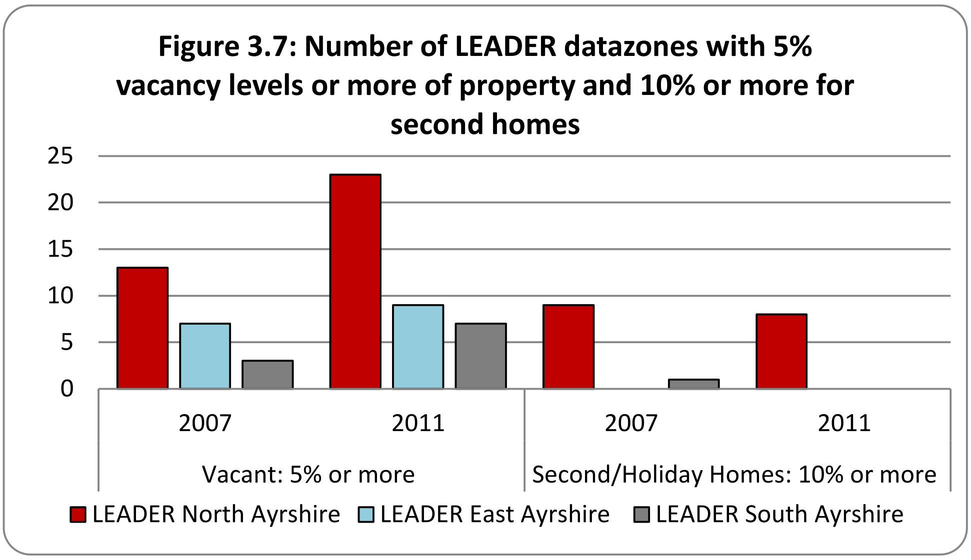
Figure 3.6: Number of Rural datazones with 5% vacancy levels or more of property and 10% or more for second homes



Source: SNS

Figure 3.6 shows that in all three local authorities there has been an increase in vacancy levels between 2007 and 2011. Rural North Ayrshire has the highest level of datazones with 5% and more vacancy rates in domestic property with an increasing trend from 8 rural datazones in 2007 to 12 rural datazones in 2011. Due to the islands, Arran and the Cumbraes, the presence of secondary homes is particularly high (ranging from 13% to 36%) in eight rural datazones in North Ayrshire.

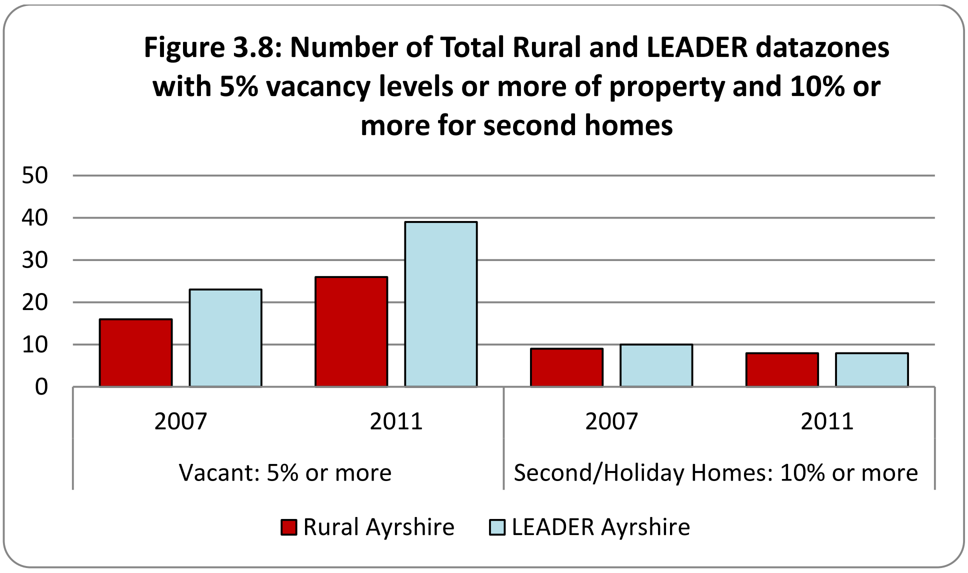
Figure **3.7** shows the same analysis as **Figure 3.6** above but for LEADER datazones.



Source: SNS

The data remains relatively similar to that of the rural location with the most noticeable difference being the increase in the number of datazones within North Ayrshire for domestic households with vacancy levels of 5% or more in 2011 (23 datazones in comparison to rural North Ayrshire of 12 datazones), and an increase of 10 over the five year period.

Figure 3.8 shows the increase in vacancy levels in the Total Rural Ayrshire and the LEADER area between 2007 and 2011.

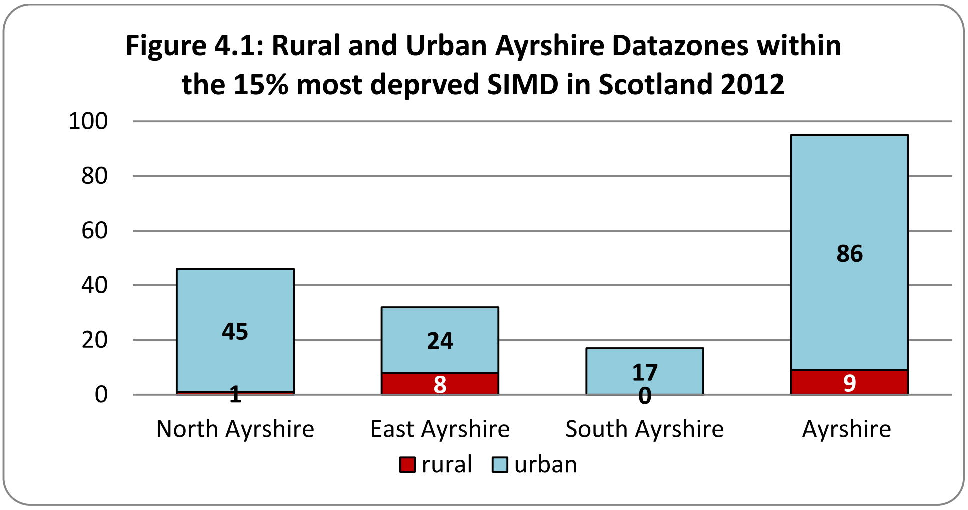


Source: SNS

4. Poverty and Deprivation

This section details the level of poverty and deprivation within each of the local authorities in Ayrshire. We have based our analysis on the most recent Scottish Index of Multiple Deprivation (SIMD) data (2012).

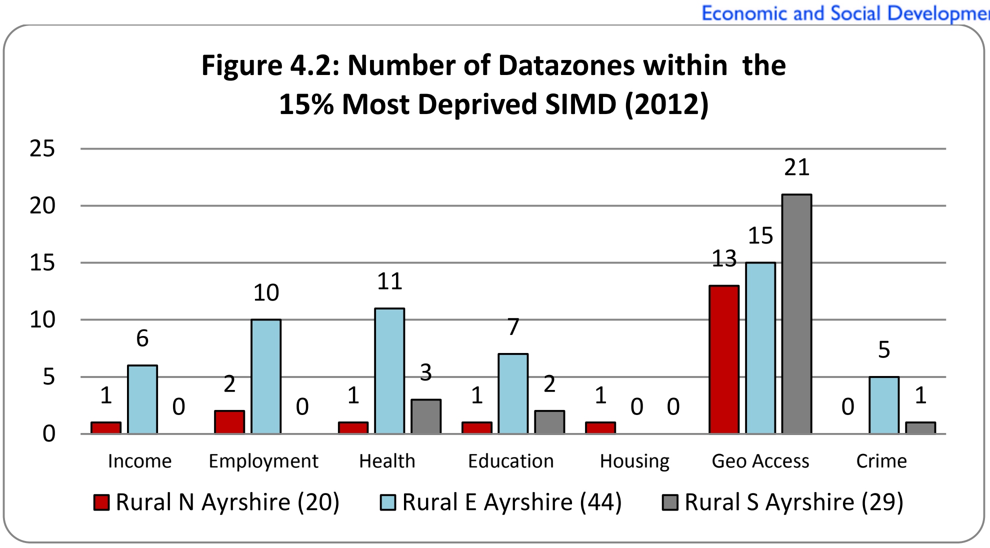
Analysis has been undertaken to determine the number of urban and rural datazones in Ayrshire that are categorised as being within the 15% most deprived areas. This category represents an aggregate value across all seven SIMD domains (income, employment, health, education, housing, geographic access and crime).



Source: SIMD (2012)

Figure 4.1 indicates that the urban area of North Ayrshire has the highest number of datazones within the 15% most deprived areas in Scotland (45 representing 28% of all urban datazones) however only one of the 20 rural datazones within North Ayrshire falls ino this category. In East Ayrshire, there are 24 urban datazones within this category (22% of all urban datazones), and 8 rural datazones representing 18% of its rural area. Whilst there are 17 urban, there are no rural datazones within the 15% most deprived SIMD category in South Ayrshire.

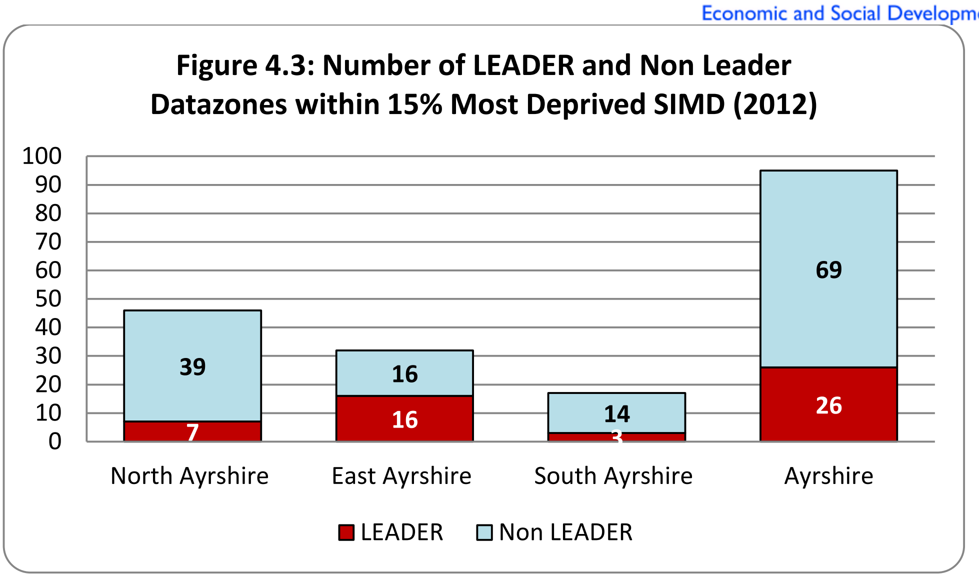
Looking at the individual seven SIMD domains of deprivation separately, **Figure 4.2** shows that more rural areas in Ayrshire are significantly affected in the one or the other domain.



Source: Scottish Index of Multiple Deprivation (2012)

Figure 4.2 shows that the most dominant issue of deprivation in rural areas is geographic access. Most of the rural datazones in South Ayrshire (21 out of 29; 69%) are included in the category of the 15% most deprived datazones in Scotland. Also in North Ayrshire (13 out of 20; 65%) suffer from access issues. In East Ayrshire, however, less rural datazones (34%) are affected by poor geographic access. The illustration further demonstrates that many more datazones in rural East Ayrshire are affected by significant deprivation issues (six out of seven SIMD domains) than the rural areas in North and South Ayrshire. For example, in North Ayrshire it is mainly one datazone which suffers from multiple deprivation, being in the worst 15% regarding income, employment, health, education, and housing. Apart from geographic access, rural South Ayrshire is the least deprived area with only three other domains – health; education; and crime registered as problematic in one to three datazones.

Analysis was also undertaken to determine the number of LEADER/non LEADER datazones categorised as being within the 15% most deprived areas; **Figure 4.3** details this.

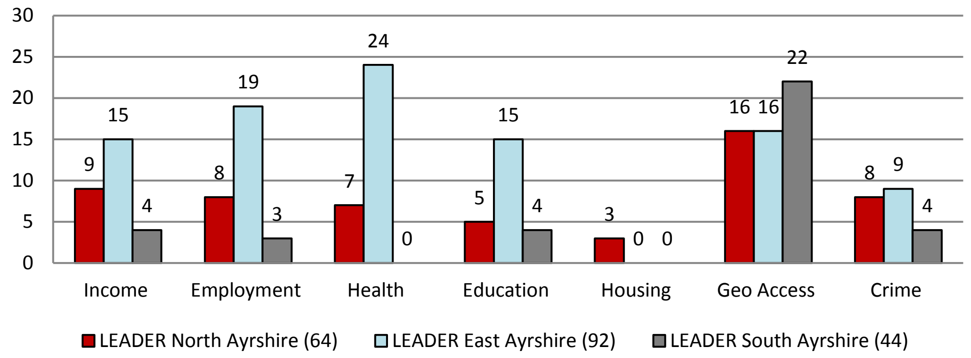


Source: Scottish Index of Multiple Deprivation (2012)

The inclusion of accessible and remote small towns has a substantial impact on the number of datazones within the 15% most deprived SIMD zones in rural/LEADER areas adding six datazones in North Ayrshire, a further eight in East Ayrshire and three in South Ayrshire. East Ayrshire has an equal split of datazones within the 15% most deprived areas within LEADER and non-LEADER defined areas (16 datazones each). However, apart from East Ayrshire, multiple deprivation is a significantly worse problem in urban/non LEADER areas in North and South Ayrshire than in their rural/LEADER areas.

Figures 4.4 and 4.5 depict the breakdown of the seven SIMD domain categories for each of the LEADER local authority areas, total rural Ayrshire and the LEADER area providing the number of datazones within each area within the worst 15% most deprived SIMD.

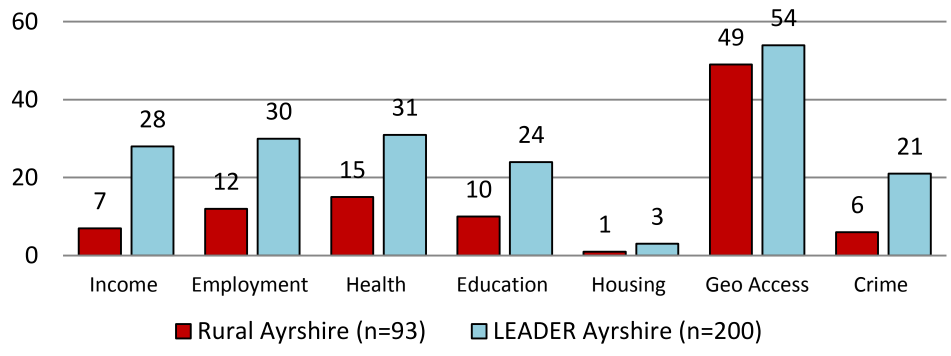
Figure 4.4: Number of LEADER Datazones within the 15% Most Deprived SIMD (2012)



Source: Scottish Index of Multiple Deprivation (2012)

Figure 4.4 details the LEADER East Ayrshire to be the most deprived dominating five of the seven domains (health, employment, income, education and crime) with health being the most cited (24 datazones). LEADER South Ayrshire has relatively low levels of deprivation with no deprivation for health or housing however the area has the poorest geographic access of all three local authorities (22 datazones compared with 16).

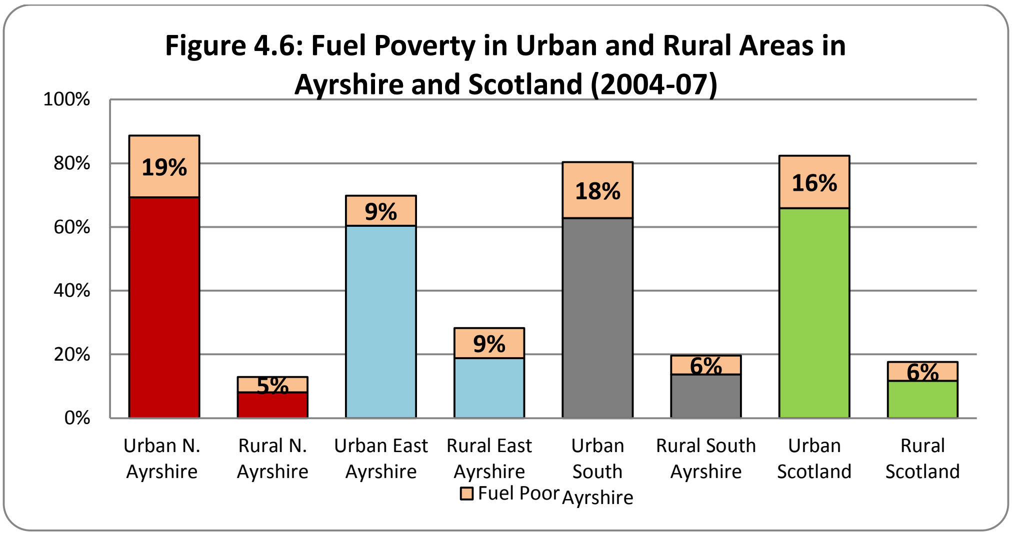
Figure 4.5: Number of Total Rural and LEADER Datazones within the 15% Most Deprived SIMD (2012)



Source: Scottish Index of Multiple Deprivation (2012)

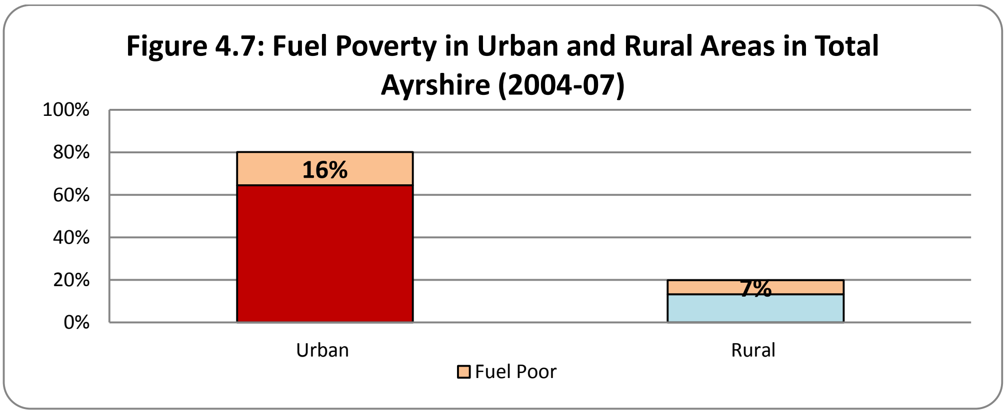
Fuel Poverty

Recent data regarding fuel poverty is available at local authority level only. Although in 2004-07 local authority data was split by rural and urban location (six fold rural classifications), this information has since been discontinued and is only available at local authority level for 2009-11. **Figures 4.6 and 4.7** detail the urban/rural split in 2004/07.



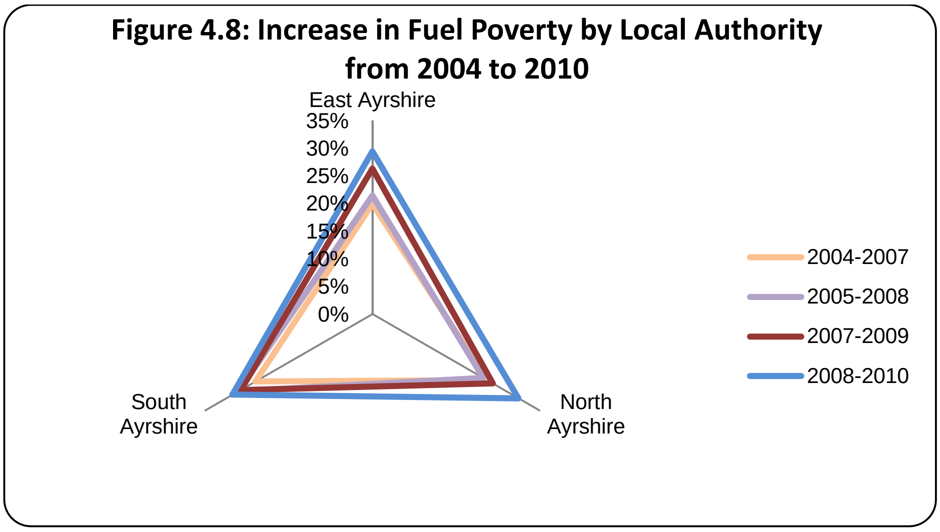
Source: Scottish Household Survey

Fuel poverty levels in rural locations within North and South Ayrshire were relatively similar to the national average of 6% in Rural Scotland, only East Ayrshire experienced a higher percentage of those classified as fuel poor (9%). **Figure 4.6** also illustrates that fuel poverty was much higher in the urban areas of North and South Ayrshire slightly higher than at the Scotland level, with the exception of East Ayrshire which registered the same percentage of urban households suffering from fuel poverty as in their rural area.



Source: Scottish Household Survey

Figure 4.8 illustrates the increase in fuel poverty from 2004 to 2010.



Source: Scottish Household Survey

The percentage of households classified as fuel poor has increased year on year since 2004-2007 for all local authority areas, with the exception of North Ayrshire which experienced a minor decline in 2005-08. A combination of increasing fuel prices and the economic crisis are most likely responsible for this increase. This also indicates that recent energy efficiency programmes and home insulation initiatives have not yet been able to counteract this increasing negative trend.

5. Access to Services and Transport

This section focuses on the access to services and transport within the rural/LEADER areas of Ayrshire in comparison to the relevant total local authority area and national average where appropriate. Further information can be ascertained from Annex C – Capital Asset Report of the Rural Study report providing further detail to the major transport links by local authority area including maps.

Drive Time

Analysis of datazones within less than a five mile drive of key services has been undertaken and detailed in terms of percentage out of the total number of datazones within each area for rural, LEADER and local authority areas, **Table 5.1 and Table 5.2** (over).

Table 5.1: Percentage of Datazones within 5 miles of Key Services (2006-09)

	GP		Post Office		Primary School		Secondary School		Shopping Facilities	
	2006	2009	2006	2009	2006	2009	2006	2009	2006	2009
Rural North Ayrshire (n=20)	55%	80%	70%	80%	85%	100%	20%	35%	15%	55%
Rural East Ayrshire (n=44)	61%	93%	80%	100%	80%	100%	9%	61%	5%	36%
Rural South Ayrshire (n=29)	69%	86%	86%	86%	100%	100%	3%	31%	0%	17%
LEADER North Ayrshire (n=64)	83%	92%	91%	94%	95%	100%	42%	55%	56%	75%
LEADER North Ayrshire (n=92)	80%	97%	90%	100%	90%	100%	30%	71%	32%	60%
LEADER North Ayrshire (n=44)	80%	89%	91%	100%	100%	100%	36%	55%	32%	45%
North Ayrshire (n=179)	94%	97%	97%	98%	98%	100%	65%	82%	67%	91%
East Ayrshire (n=154)	76%	98%	94%	100%	94%	100%	44%	82%	53%	76%
South Ayrshire (n=147)	85%	97%	97%	97%	100%	100%	65%	86%	64%	84%

Source: SNS

The percentage of datazones within five miles of all key services in **Table 5.1** has increased between 2006 and 2009 indicating an improvement, with all datazones within the areas now having access to a primary school within a reasonable distance as well as over 70% of all areas having access to a GP and Post Office.

However, access to secondary schools and shopping facilities, although having increased over the three year period, remains varied. For example, only 17% of rural South Ayrshire (5 datazones) could access shopping facilities within 5 miles drive, compared to 55% of rural North Ayrshire.

Table 5.2: Percentage of Datazones within 5 miles of Key Services (2006-09)

	GP		Post Office		Primary School		Secondary School		Shopping Facilities	
	2006	2009	2006	2009	2006	2009	2006	2009	2006	2009
Rural Ayrshire (n=93)	62%	88%	80%	91%	87%	100%	10%	46%	5%	34%
LEADER Ayrshire (n=200)	81%	94%	91%	98%	94%	100%	36%	62%	40%	62%

Source: SNS

Travel to Work

It should be highlighted that available data has been taken from the 2001 census therefore is a number of years out of date as well as only being available at local authority level or greater.

The most popular method to travel to work for all three local authority areas is by car (driver or passenger|) accounting for circa two thirds for each area (65%, 69%, and 68% relatively), this was followed by on foot circa 12%, **Table 5.3**.

Table 5.3: Method - Travel to Work (2001)

	North Ayrshire	East Ayrshire	South Ayrshire
Car - driver	54.6%	57.6%	58.4%
On foot	12.4%	12.7%	12.0%
Car - passenger	10.8%	11.2%	9.2%
Bus, minibus or coach	10.7%	9.8%	8.6%
Works mainly at or from home	6.9%	6.5%	7.1%
Bicycle	1.4%	0.5%	1.6%
Other	0.6%	0.5%	0.6%
Taxi	0.5%	0.4%	0.6%
Train	1.7%	0.3%	1.4%
Motorcycle etc	0.4%	0.3%	0.5%

Source: NOMIS – 2001 Census (Travel to Work Flow)

Rail Travel

A number of sources were used to decipher the rail links including Scotrail and travellinescotland.com.

Analysis was then undertaken by a “good walking distance” which was determined as a distance walk of 30 minutes or less i.e. roughly two miles. **Table 5.4** detailed the number of LEADER datazones within a good (up to 2miles), mixed (more than 2miles including geographically large datazones with good and poor access) or poor (more than 5 miles) distance to rail travel.

Table 5.4: Percentage of LEADER Datazones within Good/Mixed/Poor Distance to Rail Travel (2013)

	Good (Less than 30 minutes walk)	Mixed (geographically large datazones)[3]	Poor (More than 30 minutes walk)
North Ayrshire	67%	9%	23%
North Ayrshire (excluding islands)	78%	11%	11%
East Ayrshire	38%	10%	52%
South Ayrshire	32%	34%	34%
Ayrshire	**46%**	**15%**	**39%**

Source: Scotrail, www.travellinescotland.com

Overall Ayrshire has varied access to rail links with under half of all datazones being located within a 30 minute walk or less. Each area is detailed below.

North Ayrshire

Excluding the isles of Arran and the Cumbraes, North Ayrshire has the best rail links, with the majority (78%) of datazones within a 30 minute walk of train station. This includes the following services:

- Largs is connected to Glasgow by an hourly service stopping at Glengarnock, Kilwinning, Stevenston, Saltcoats, Ardrossan South Beach, West Kilbride and Fairlie; and
- Ardrossan ferry is linked to Glasgow by an hourly service stopping at Glengarnock, Dalry, Kilwinning, Stevenston, Saltcoats, Ardrossan South Beach and Ardrossan Town.

South Ayrshire

One third of the LEADER datazones within South Ayrshire is located within a thirty minute walk or less (32%), with a further third representing a mixed area (34%) and

[3] In the case of geographically large datazones, access to train stations may vary depending on where the station is located, for example in Rural Cumnock distance to the nearest train station varies between 1 and 10 miles from one end of the datazone to the other.

a further third (34%) with poor access to railway stations. South Ayrshire is serviced by one train line. The service includes:

- Ayr is linked to Glasgow with trains leaving around every 15 minutes, also linking Prestwick International Airport with Glasgow ; and
- Stranraer is linked by a service to Kilmarnock stopping at Barrhill, Girvan, Maybole, Ayr, Prestwick Town, Prestwick Int. Airport and Troon. There is also a service to Glasgow stopping at Barrhill, Girvan, Maybole, Ayr and Kilwinning.

East Ayrshire

East Ayrshire generally has poor rail links to Glasgow with more than half of the LEADER datazones with poor access to rail services (52%). The exceptions to this are the areas around Kilmarnock and New Cumnock:

- New Cumnock is linked to Glasgow on an infrequent service stopping at Auchinleck, Kilmarnock, Kilmaurs, Stewarton and Dunlop; and
- Kilmarnock is linked with Glasgow by a half hourly service stopping at Kilmaurs, Stewarton and Dunlop.

Bus Travel

All of Ayrshire is covered by the Mybus scheme which is a bookable bus service for the disabled and over 80s. Some parts are covered by the 'Mybus rural scheme' which is a bookable service for anyone in inaccessible areas.

North Ayrshire with its large number of population centres has the best bus links to Glasgow. There are few areas in North Ayrshire that do not have bus access to a train station or a direct bus to Glasgow, and those areas that do not are mainly single farms. Arran and the Cumbraes have relatively frequent bus links around the island connected to the ferry services to the mainland.

East Ayrshire has mixed bus links to Glasgow. The areas around Cumnock, New Cumnock and Auchinleck are well served by the X76 which goes directly to Glasgow via Catrine and Kilmarnock as well as a number of local bus services linked to the train station at New Cumnock. Rural areas around Kilmarnock are well served with bus links and has the Mybus rural service as far out as Lugton, Waterside and Darvel. Doon Valley however, has poor bus links to Glasgow with a journey to Ayr required using the 52 bus service which is a frequent service but taking around an hour.

In South Ayrshire, Ayr has frequent bus links to Glasgow. Other larger towns also have bus transport links to Glasgow. However, there are some areas with much less frequent links, such as rural Carrick.

Much of South Ayrshire has poor bus links to Glasgow due to distance, sparse population and lack of access to arterial roads. However, most population centres have bus services to Ayr or other towns with links to Glasgow. The areas around Coylton and the Coalfields have frequent bus links which take no more than half an hour. The area around Dundonald, Loans and Symington has good local bus links to the train station at Prestwick and the A77 where the X77 bus service goes to Glasgow. Carrick has relatively poor links mainly due to its large area and sparse population. Population centres in this area often have infrequent services to Ayr or Girvan, and travelling to Glasgow can take a long time. Much of rural Carrick is served by the Mybus rural service however.

Ferry Travel

There are three ferry services operating within North Ayrshire:

- Largs to Greater Cumbrae;
- Ardrossan to Brodick (Isle of Arran); and
- Clanoig (Isle of Arran) to Lochranza (Argyll and Bute).

Each of the three services are described below.

Largs to Greater Cumbrae

Greater Cumbrae is connected to Largs by a frequent ferry operated by Caledonian MacBrayne with the crossing lasting ten minutes. In the winter the earliest ferry departing Largs is at 6:45am and 7:00am from Greater Cumbrae. Ferries are then every half hour until 20:15 from Largs and 20:30 from Greater Cumbrae. In the spring and autumn there is an additional later ferry on a Friday departing Largs at 22:15 and Greater Cumbrae at 22:30 o'clock.

The service becomes more frequent during the summer with ferries departing every 15 minutes. There is a reduced service on Sunday with the same frequency but first ferries are from 9:15am from Largs and 9:30am from Greater Cumbrae and last ferries 20:15 from Largs and 20:30 from Greater Cumbrae. In the summer prices are £5.40 per person return and £23.20 per car and in the winter they are £3.65 per person return and £19.10 per car (2013 prices).

Ardrossan to Brodick

This ferry service links the largest settlement on Arran to the mainland and is operated by Caledonian MacBrayne. In the winter the first ferry from Ardrossan departs and 7:00am and from Brodick at 8:20am. The service is infrequent with ferries every two hours and 45 minutes with the last service departing Ardrossan at 18:00 and Brodick at 19:20 o'clock.

In the spring and autumn a later 'Friday only' service is introduced departing Ardrossan at 20:30 and Brodick at 21:40 o'clock. In the summer ferries become more frequent with the first ferry at 7:00am from both Ardrossan and Brodick and every one hour and 20 minutes thereafter with the last services leaving at 19:20 from both ports with the later Friday services continuing. There is a later service introduced in the summer on a Saturday with the last ferry leaving Ardrossan at 22:00 o'clock. Throughout the year there is a reduced service on Sundays which is the same as the winter timetable but with first ferry departing Ardrossan at 9:45am and Brodick at 11:05am. In the summer the first service from Brodick is 9:05am and the last service from Ardrossan is 20:00 o'clock. In 2013, prices during the summer are £6.55 per person return and £48.00 per car. In the winter the prices are £4.95 per person return and £31.50 per car.

Claonaig to Lochranza

The Claonaig to Lochranza route is a summertime only service linking the North of Arran with Argyll and Bute and is also operated by Caledonian MacBrayne. The first ferry departs Lochranza at 8:15am and Claonaig at 8:50am. The service is then every one hour and 15 minutes until the last ferry departs Lochranza at 18:25 and

Claonaig at 19:00 o'clock. On a Sunday the first ferry is not until 9:30am from Lochranza and 10:05am from Claonaig. 2013 Prices on this service are £5.95 per person return and £26.25 per car.

6. Employment

This section details employment within Ayrshire.

Working Age Population

The working age population, defined as individuals aged between 16-64 years old, is detailed in **Table 6.1 and Table 6.2**. Across all three geographic areas (rural, LEADER and local authority), Ayrshire has a slightly lower percentage of working age population than the national level (66%).

Table 6.1: Working Age Population (2011)

	Number	% of total population
Rural North Ayrshire	10,046	62%
Rural East Ayrshire	22,953	65%
Rural South Ayrshire	15,762	63%
LEADER N Ayrshire	31,074	62%
LEADER E Ayrshire	47,296	65%
LEADER S Ayrshire	22,738	63%
North Ayrshire	85,400	63%
East Ayrshire	77,800	65%
South Ayrshire	69,300	62%
Scotland	**344,9100**	**66%**

Source: SNS – mid year population estimate

Table 6.2: Working Age Population (2011)

	Number	% of total population
Total Rural Ayrshire	48,761	64%
Total LEADER Ayrshire	101,108	63%
Total Ayrshire	232,500	69%

Source: SNS – mid year population estimate

Economic Activity Rate

The economic activity rate is calculated as the number of people economically active aged between 16-64 years, i.e. working age population. A person is categorised as economically active if they are in employment or are actively seeking employment and claiming Job Seekers Allowance.

Information is unavailable lower than the local authority level for the economic activity rate.

Table 6.3: Economic Activity Rate 16-64 years old (2007-2011)

	2007	2011	% point change
N Ayrshire	73.9%	70.7%	-3.2
E Ayrshire	75.4%	74.7%	-0.7
South Ayrshire	78.1%	74.2%	-3.9
Scotland	**77.5%**	**77%**	**-0.5**

Source: Nomis – Annual Population Survey

The economic activity rate (**Table 6.3**) for each of the three local authority areas has decreased between 2007 and 2011, most noticeably South Ayrshire has experienced a decrease of nearly four percentage points , falling from 78.1% to 74.2% resulting in all local authorities being below the national economic activity rate of 77% of the working age population.

Employment Rate

The employment rate measures the number of people in employment as a rate of the working age population. Data is available at local authority level and above detailed in **Table 6.4**.

Table 6.4: Employment Rate 16 to 64 year old (2007-2011) %

	2007	2011	% point change
N Ayrshire	69.2%	61.0%	-8.2
E Ayrshire	70.2%	66.7%	-3.5
South Ayrshire	74.3%	65.9%	-8.4
Scotland	**73.8%**	**70.7%**	**-3.1**

Source: Nomis - Annual Population Survey

As with the economic activity rate, the employment rate has fallen for the local authority areas as well as Scotland. North and South Ayrshire noticed a decrease of over eight percentage points.

Employment by Industry Sector

Employment data is available between 2008 and 2011. It should be noted that the term “employment” refers to employees and proprietors of the business.

As shown in **Table 6.5** and **Table 6.6**, in 2011, total employment in the rural and LEADER datazones was as follows:

- rural North Ayrshire – 8,681 (23% of local authority area);
- rural East Ayrshire - 12,977 (34% of local authority area);
- rural South Ayrshire – 8,990 (20%of local authority area);
- LEADER North Ayrshire – 16,074 (40% of local authority area);
- LEADER East Ayrshire – 23,333 (63% of local authority area); and
- LEADER South Ayrshire – 15,250 (34% of local authority area).

Table 6.5: Employment (2008-2011)

	2008	2011	% Change	As a % of local authority area
Rural N Ayrshire	9,587	8,681	-9%	23%
Rural E Ayrshire	12,461	12,977	4%	34%
Rural South Ayrshire	9,240	8,990	-3%	20%
LEADER N Ayrshire	17,325	16,074	-7%	40%
LEADER E Ayrshire	23,705	23,333	-2%	63%
LEADER South Ayrshire	17,291	15,250	-12%	34%
N Ayrshire	40,972	37,190	-9%	N/A
E Ayrshire	39,984	40,019	0.08%	N/A
South Ayrshire	48,481	44,289	-9%	N/A
Scotland	**2,462,816**	**2,332,738**	**-5%**	**N/A**

Source: ABI

Table 6.6: Employment (2008-2011)

	2008	2011	% Change	As a % of local authority area
Total Rural Ayrshire	31,288	30,648	-2%	25%
Total LEADER Ayrshire	58,321	54,657	-6%	45%
Total Ayrshire	129,437	121,498	-6%	N/A

Source: ABI

Rural North and South Ayrshire both experienced a decrease in total employment (9% and 3% respectively) whereas rural East Ayrshire experienced an increase of 4%.

Table 6.7 to 6.10 (below) details a breakdown of each of the three rural areas, the LEADER areas and the local authority areas by industry sector. A traffic light system indicates negative change in employment between 2008 and 2011 (red), no change (orange), and positive change in employment (green).

Table 6.7 shows that only Rural East Ayrshire experienced a positive employment increase between 2008 and 2011 (+516), with major job increases reported in business administration and support services (+793), and in health (+437), whilst mining and quarrying and utilities experienced a significant loss of -406 jobs.

Rural South Ayrshire experienced more job reductions particularly in manufacturing where 412 jobs were lost over the reporting period. This was counterbalanced by increases in health (+235) and in arts and entertainment (+168), but an overall loss of- 250 jobs was experienced across all industry sectors.

Rural North Ayrshire suffered significantly by a reduction of -1,008 jobs in manufacturing, and -437 lost jobs in information and communication. Although there were increases in employment in business administration (+255) and in mining, quarrying and utilities (+233), an overall loss of -906 jobs were reported between 2008 and 2011.

Table 6.8 shows the change in employment for the respective LEADER area. The inclusion of small towns has a drastic impact on South Ayrshire, now showing a loss of 2,041 mainly resulting from a major job reduction in public administration and defence (-1,193) during the reporting period. Further high losses have been reported in the transport and storage sector (-608) and in manufacturing (-395).

The positive employment gain experienced in the rural area, has also been reduced to a negative figure through the inclusion of small towns in the East Ayrshire LEADER area, now showing a -375 employment record between 2008-2011. Whilst business administration and health are still growing sectors, further decreases in mining, quarrying and utilities, (-605), manufacturing (-459), construction (-387) and accommodation and food services (-260) are now reported.

In the LEADER North Ayrshire area, the inclusion of small towns has led to a further loss of 345 jobs in the area primarily due to job losses in manufacturing and education. Across the North Ayrshire LEADER area employment has reduced by -1,251.

Although small in actual numbers, the decrease of employment in the agricultural, forestry and fishing sector should be noted. Particularly for North Ayrshire, this sector has reduced by almost 50% (from 45 employess in 2008 to 26 in 2011), and by a third in the East Ayrshire LEADER area. The negative trend was less stark in South Ayrshire.

Table 6.9 shows employment by industry sector in 2011 and its percentage change since 2008 for Total Rural Ayrshire and its LEADER area. The table demonstrates that the only industry sectors experiencing positive change in both areas are Business Administration and Support Services, Professional, Scientific and Technical, Health, Property and Arts and recreational sector. Further small increases are also experienced in the Total Rural Area of Ayrshire in Retail and Transport & Storage.

Table 6.10 shows employment by industry sector in 2011 and its percentage change since 2008 across the three local authority areas and at the Scottish Level. The industry sectors with most negative employment developments include the Finance and Insurance sectors which reduced by 19% at the Scottish level, but had a much more profound impact in the three local authority areas reducing by 32%, 40% and 35% for North, East and South Ayrshire respectively. In addition, the three local authorities suffered proportionately more by reductions in the manufacturing sector where there was an 11% drop at Scottish level, but a 25%, 17% and 12% reduction in North, East and South Ayrshire respectively.

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Table 6.7: Employment by Rural Datazone (2008-11)

	Rural North Ayrshire			Rural East Ayrshire			Rural South Ayrshire		
	2008	2011	Change	2008	2011	Change	2008	2011	Change
Agriculture, forestry & fishing	31	16	-15	99	39	-60	169	140	-29
Mining, quarrying & utilities	698	931	233	1,287	881	-406	194	125	-69
Manufacturing	2,876	1,868	-1,008	512	377	-135	2,845	2,433	-412
Construction	599	676	77	895	674	-221	557	455	-102
Motor trades	112	124	12	126	127	1	67	37	-30
Wholesale	535	378	-157	394	472	78	392	392	0
Retail	853	863	10	387	385	-2	475	554	79
Transport & storage	362	459	97	531	572	41	325	248	-77
Accommodation & food services	911	890	-21	406	316	-90	1,343	1,377	34
Information & communication	512	73	-439	42	43	1	80	117	37
Financial & insurance	38	27	-11	54	14	-40	24	32	8
Property	24	35	11	58	71	13	65	55	-10
Professional, scientific & technical	161	269	108	188	212	24	279	349	70
Business administration & support services	221	476	255	809	1,602	793	489	436	-53
Public administration & defence	391	333	-58	503	496	-7	57	50	-7
Education	382	245	-137	575	594	19	505	413	-92
Health	308	476	168	5,255	5,692	437	1,134	1,369	235
Arts, entertainment, recreation & other services	573	542	-31	340	410	70	240	408	168
Total	**9,587**	**8,681**	**-906**	**12,461**	**12,977**	**516**	**9,240**	**8,990**	**-250**

Source: Nomis – BRES 2008-2011

Table 6.8: Employment by LEADER Datazone (2008-11)[4]

	LEADER North Ayrshire			LEADER East Ayrshire			Leader South Ayrshire		
	2008	2011	Change	2008	2011	Change	2008	2011	Change
Agriculture, forestry & fishing	45	26	-19	134	91	-43	203	187	-16
Mining, quarrying & utilities	762	997	235	1,453	848	-605	197	129	-68
Manufacturing	3,773	2,559	-1,214	2,083	1,624	-459	3,030	2,635	-395
Construction	1,298	1,253	-45	1,583	1,196	-387	868	756	-112
Motor trades	205	217	12	444	347	-97	334	298	-36
Wholesale	712	540	-172	538	599	61	422	430	8
Retail	1,987	1,899	-88	1,600	1,484	-116	810	876	66
Transport & storage	687	786	99	873	990	117	1,041	433	-608
Accommodation & food services	1,713	1,898	185	1,019	759	-260	1,604	1,608	4
Information & communication	556	114	-442	89	93	4	92	129	37
Financial & insurance	122	100	-22	220	126	-94	63	58	-5
Property	53	81	28	138	143	5	146	145	-1
Professional, scientific & technical	429	682	253	497	445	-52	370	431	61
Business administration & support services	735	738	3	1,421	2,322	901	563	530	-33
Public administration & defence	645	614	-31	910	805	-105	1,326	133	-1,193
Education	1,157	931	-226	1,263	1,282	19	990	868	-122
Health	1,383	1,678	295	6,734	7,360	626	4,774	5,091	317
Arts, entertainment, recreation & other services	1,063	961	-102	698	808	110	458	513	55
Total	**17,325**	**16,074**	**-1,251**	**21,697**	**21,322**	**-375**	**17,291**	**15,250**	**-2,041**

[4] Agriculture, forestry and fishing data is marginally larger than equivalent Local Authority data, this is owing to the slight overlap of LEADER

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Table 6.9: Employment by Total Rural and Total LEADER (2008-11)[5]

	Total Rural				Total LEADER			
	2008	2011	Change	Change %	2008	2011	Change	Change %
Agriculture, forestry & fishing	299	1,953	-104	-35%	382	304	-78	-20%
Mining, quarrying & utilities	2,179	1,937	-242	-11%	2,412	1,974	-438	-18%
Manufacturing	6,233	4,678	-1,555	-25%	8,886	6,818	-2,068	-23%
Construction	2,051	1,805	-246	-12%	3,749	3,205	-544	-15%
Motor trades	3,05	288	-17	-6%	983	862	-121	-12%
Wholesale	1,321	1242	-79	-6%	1,672	1,569	-103	-6%
Retail	1,715	1,802	87	5%	4,397	4,259	-138	-3%
Transport & storage	1,218	1,279	61	5%	2,601	2,209	-392	-15%
Accommodation & food services	2,660	2,583	-77	-3%	4,336	4,265	-71	-2%
Information & communication	634	233	-401	-63%	737	336	-401	-54%
Financial & insurance	116	73	-43	-37%	405	284	-121	-30%
Property	147	161	14	10%	337	369	32	9%
Professional, scientific & technical	628	830	202	32%	1,296	1,558	262	20%
Business administration & support services	1,519	2,514	995	66%	2,719	3,590	871	32%
Public administration & defence	951	879	-72	-8%	2,881	1,552	-1,329	-46%
Education	1,462	1,252	-210	-14%	3,410	3,081	-329	-10%
Health	6,697	7,537	840	13%	12,891	14,129	1,238	10%
Arts, entertainment, recreation & other services	1,153	1,360	207	18%	2,219	2,282	63	3%
Total	**31,288**	**30,648**	**-640**	**-2%**	**56,313**	**52,646**	**-3,667**	**-7%**

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Table 6.10: Employment by Local Authority (2008-11)

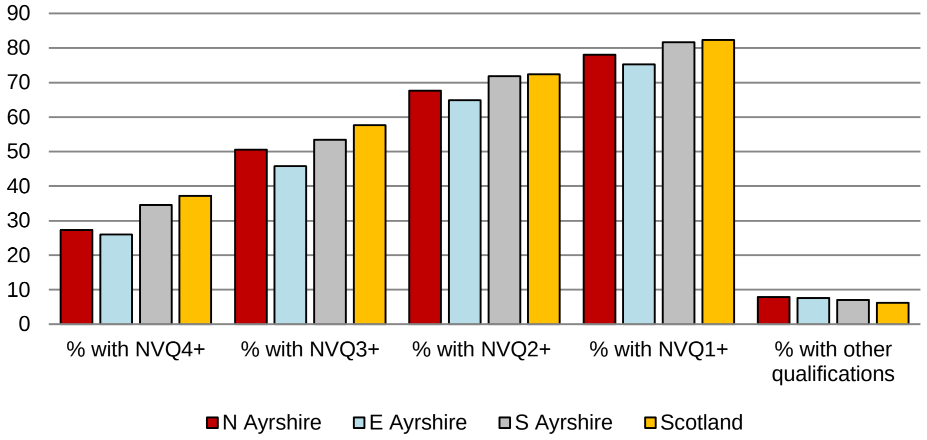
	North Ayrshire			East Ayrshire			South Ayrshire			Scotland		
	2011	**Change**	**% Change**	**2011**	**Change**	**% Change**	**2011**	**Change**	**% Change**	**2011**	**Change**	**% Change**
Agriculture, forestry & fishing	21	-63	-75%	83	-56	-40%	218	-52	-19%	34,685	-1,635	-5%
Mining, quarrying & utilities	1,334	171	15%	1,292	-581	-31%	232	-44	-16%	64,055	5,848	10%
Manufacturing	4,085	-1,388	-25%	3,123	-642	-17%	4,631	-655	-12%	179,577	-21,535	-11%
Construction	2,348	-187	-7%	2,111	-501	-19%	1,798	-222	-11%	128,751	-26,098	-17%
Motor trades	540	60	13%	728	-149	-17%	951	-127	-12%	37,637	-273	-1%
Wholesale	1,129	-293	-21%	1,089	46	4%	1,114	-110	-9%	67,678	-1,0361	-13%
Retail	5,139	-282	-5%	4,024	-416	-9%	6,125	-432	-7%	238,131	-12,375	-5%
Transport & storage	1,401	-77	-5%	1,551	59	4%	2,390	-778	-25%	97,838	-3,886	-4%
Accommodation & food services	3,442	-373	-10%	1,643	-306	-16%	5,044	205	4%	165,905	-12,845	-7%
Information & communication	355	-498	-58%	224	-92	-29%	420	58	16%	56,716	-3,215	-5%
Financial & insurance	385	-182	-32%	491	-329	-40%	597	-321	-35%	84,183	-19,719	-19%
Property	290	-128	-31%	243	-72	-23%	497	-142	-22%	30,383	2,677	10%
Professional, scientific & technical	1,439	599	71%	1,124	-40	-3%	1,592	181	13%	144,913	4,316	3%
Business administration & support services	1,882	74	4%	4,485	840	23%	1,052	-326	-24%	178,825	-1,414	-1%
Public administration & defence	1,981	-178	-8%	3,085	937	44%	1,914	-1,965	-51%	148,317	-1,179	-1%
Education	3,145	-815	-21%	2,814	-181	-6%	3,490	-164	-4%	190,567	-20,302	-10%
Health	6,100	120	2%	10,024	1,445	17%	9,530	667	8%	380,595	1,814	0.5%
Arts, entertainment, recreation & other services	2,175	-342	-14%	1,884	72	4%	2,696	38	1%	103,983	-9,894	-9%
Total	**37,190**	**-3,782**	**-9%**	**40,019**	**35**	**0.1%**	**44,289**	**-4192**	**-9%**	**2,332,738**	**-130,078**	**-5%**

Source: Nomis – BRES 2008-2011

7. Skills, Qualifications and Quality of Employment

The section analyses the skills and qualification of the Ayrshire population. **Figure 7.1** details the percentage of those of working age that have a NVQ qualification.

Figure 7.1: % of working age population with NVQ Qualifications



Source: Annual Population Survey

South Ayrshire performs the best in terms of percentage throughout all four categories across the three local authority area with the exception of 'other qualifications'. It should be noted that all three local authority areas qualification attainments is lower than the national average. **Table 7.1** details the change in qualification attainments from 2007 to 2011.

Table 7.1: NVQ Attainment (2007-2011)

	North Ayrshire		East Ayrshire		South Ayrshire		Scotland	
	2011	% Point Change	2011	% Point Change	2011	% Point Change	2011	% Point Change
% with NVQ4+ - aged 16-64	27.3	-2.3	26.0	0.9	34.5	1.6	37.2	4.1
% with NVQ3+ - aged 16-64	50.6	-1.6	45.8	-1.9	53.5	-2.7	57.6	3.1
% with NVQ2+ - aged 16-64	67.7	1.0	64.9	3.0	71.8	2.1	72.4	3.8
% with NVQ1+ - aged 16-64	78.1	-1.2	75.3	3.5	81.7	0.8	82.3	3.4
% with other qualifications - aged 16-64	7.9	1.4	7.6	0.7	7.1	0.1	6.2	-1.2
% with no qualifications - aged 16-64	14.0	-0.2	17.1	-4.2	11.2	-0.9	11.6	-2.1

Source: Source: Annual Population Survey

Quality of Employment

Table 7.2 details the quality of profession by each local authority. For both North and East Ayrshire the most common profession level is skilled trade (15.6% and 15.4% respectively). In South Ayrshire, the largest professional group with circa 18% of its working age population is within a professional occupation, similar to that of Scotland.

Table 7.2: Quality of Profession (%) (2011)

	North Ayrshire	East Ayrshire	South Ayrshire	Scotland
Professional	12.3	12.1	18.4	18.3
Associate prof & tech	13.4	9.9	13.8	13.6
Elementary	11.1	12.9	10.9	11.8
Skilled trades	15.6	15.4	13.8	11.5
Administrative & secretarial	10.8	11.6	8.8	10.8
Caring, leisure & other service	10.3	12.3	11.0	9.6
Sales & customer service	9.8	8.1	8.3	9.3
Managers, directors & senior officials	8.8	7.0	7.6	8.4
Process, plant & machine operatives	7.5	10.5	6.6	6.6

Source: Annual Population Survey 2007-2011

Table **7.3** details the change in the quality of profession from 2007 to 2011. The most significant change is a decrease of 2.5 percentage points for those within the professional occupation in East Ayrshire.

Table 7.3: Change in Quality of Profession (2007-2011)

	North Ayrshire		East Ayrshire		South Ayrshire		Scotland	
	2011	% Point Change	2011	% Point Change	2011	% Point Change	2011	% Point Change
Professional	12.3	-1.4	12.1	-2.5	18.4	2.4	18.3	0.3
Associate prof & tech	13.4	1.5	9.9	-0.5	13.8	2.4	13.6	1
Elementary	11.1	0	12.9	0.8	10.9	-1.7	11.8	0.3
Skilled trades	15.6	2	15.4	0.9	13.8	0	11.5	-0.5
Administrative and secretarial	10.8	-0.8	11.6	1.7	8.8	-2	10.8	-0.9
Caring, leisure and other service	10.3	0.1	12.3	-0.6	11.0	1.1	9.6	0.3
Sales and customer service	9.8	-0.9	8.1	0.3	8.3	-1.1	9.3	0.4
Managers, directors and senior officials	8.8	1.1	7.0	-0.1	7.6	-1.7	8.4	-0.2
Process, plant and machine operatives	7.5	-1.7	10.5	-0.2	6.6	0.2	6.6	-0.5

Source: Annual Population Survey 2007-2011

8. Business Base

This section details the number of businesses operating within the three local authority sectors. It should be noted that the Annual Business Inquiry (ABI) from which the information has been gathered was discontinued in 2008 therefore analysis can only be undertaken between 2007 and 2008 and is a number of years out of date.

The business base remained relatively stable over the period increasing between 1% and 3% across local authority and the national level. However, rural East and South Ayrshire experienced a marginally higher growth rate of 4% and 5% respectively.

The only exception to this was a decrease experienced by LEADER North Ayrshire (-2%) as can be seen in **Table 8.1** and **Table 8.2**.

Table 8.1: Business Base (2007-2008)

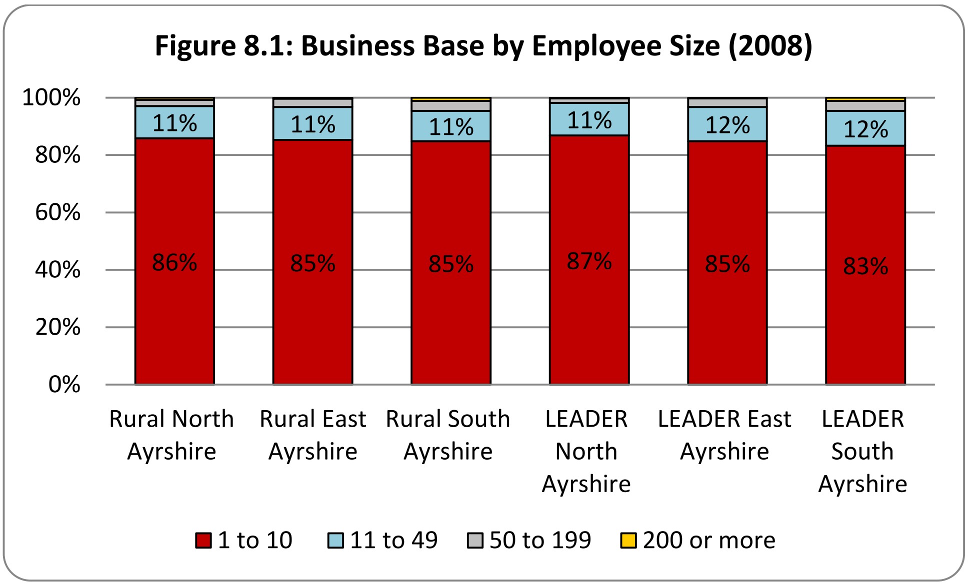
Business Base	2007	2008	Change	% Change
Rural North Ayrshire	822	827	5	1%
Rural East Ayrshire	1,000	1,047	47	5%
Rural South Ayrshire	759	789	30	4%
LEADER N Ayrshire	1,619	1,590	-29	-2%
LEADER E Ayrshire	1,971	2,032	61	3%
LEADER S Ayrshire	1,074	1,099	25	2%
North Ayrshire	3,834	3,888	54	1%
East Ayrshire	3,373	3,469	96	3%
South Ayrshire	3,804	3,865	61	2%
Scotland	**177,365**	**181,470**	**4,105**	**2%**

Source: ABI

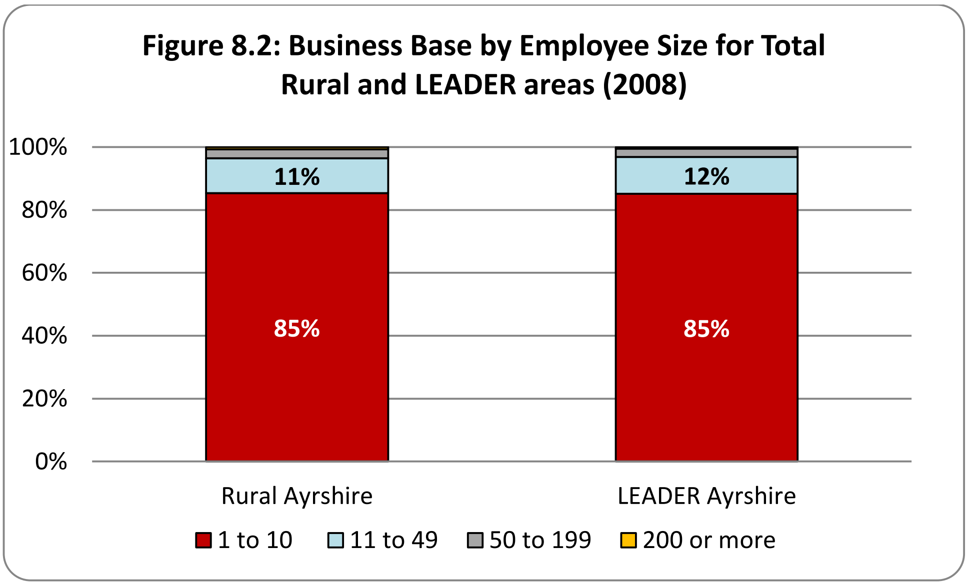
Table 8.2: Business Base Rural Total and LEADER Total (2007-2008)

Business Base	2007	2008	Change	% Change
Rural Ayrshire	2,581	2,663	82	3%
LEADER Ayrshire	4,664	4,721	57	1%

Almost all businesses operating within the rural and LEADER areas were SME's employing between 1-49 employees, with the vast majority being very small enterprises employing between 1 to 10 employees. **Figure 8.1 and Figure 8.2**, detail at various geographic levels.



Source: ABI



Source: ABI

As the following tables show, all areas experienced an increase in business base over the period 2007-2008 with the exception of LEADER North Ayrshire which experienced a decrease of -2%.

Rural East Ayrshire experienced the largest increase in its business base of 5% accounting for 47 businesses of which 43 employed between 1 and 10 employees, detailed further in **Table 8.3**, **8.4, and 8.5** (over).

Table 8.3 Business Base by Employee Numbers – Rural Locations (2007-2008)

	Rural North Ayrshire			Rural East Ayrshire			Rural South Ayrshire		
	2007	2008	Change	2007	2008	Change	2007	2008	Change
1-10	694	710	16	850	893	43	641	669	28
11- 49	101	93	-8	117	120	3	84	84	-
50-199	18	17	-1	29	30	1	26	27	1
200 or more	9	7	- 2	4	4	-	8	9	1
Total	822	827	5	1,000	1,047	47	759	789	30

Source: ABI

Table 8.4: Business Base by Employee Numbers - LEADER Locations (2007-2008)

	LEADER North Ayrshire			LEADER East Ayrshire			LEADER South Ayrshire		
	2007	2008	Change	2007	2008	Change	2007	2008	Change
1 to 10	1,363	1,380	17	1,667	1,723	56	894	915	21
11 to 49	208	180	-28	241	243	2	128	133	5
50 to 199	38	25	-13	57	60	3	40	38	-2
200 or more	10	5	-5	6	6	-	12	13	1
Total	1,619	1,590	-29	1,971	2,032	61	1074	1099	25

Source: ABI

Table 8.5: Business Base by Employee Numbers –Total Rural and LEADER Locations (2007-2008)

	Rural Ayrshire			LEADER Ayrshire		
	2007	2008	Change	2007	2008	Change
1 to 10	2,185	2,272	87	3,924	4,018	94
11 to 49	302	297	-5	577	556	-21
50 to 199	73	74	1	135	123	-12
200 or more	21	20	-1	28	24	-4
Total	2,581	2,663	82	4,664	4,721	57

Source: ABI

Information regarding business VAT registrations/de-registrations i.e. births and deaths, is only available at the local authority level and between the period of 2000 and 2007. The information is, therefore, a number of years out of date (**Table 8.6**).

Table 8.6: Business VAT Registrations/De-registrations

	2000	2007	Change	% Change
Registrations				
E. Ayrshire	195	230	35	18%
N. Ayrshire	230	270	40	17%
S. Ayrshire	250	270	20	8%
Scotland	**11,195**	**14,590**	**3,395**	**30%**
De-registration				
E. Ayrshire	195	180	-15	-8%
N. Ayrshire	205	205	0	0%
S. Ayrshire	210	210	0	0%
Scotland	**10,100**	**9,605**	**-495**	**-5%**
Stock at end of the year				
E. Ayrshire	2,515	2,690	175	7%
N. Ayrshire	2,465	2,695	230	9%
S. Ayrshire	2,865	3,100	235	8%
Scotland	**126,540**	**141,895**	**15,355**	**12%**

Source: Nomis (VAT registration 2000-2007)

In general, local authorities in Ayrshire had between 3% and 5% less business stock at the end of 2007 compared with Scotland. North Ayrshire experienced a decrease in de-registrations of 8% in 201, 3% greater than the national average. Business births increased across the board with the most noticeable increase being within East Ayrshire (18%) however this was still 12% below the national average.

Industry Sectors

Key points to note from the changes in business stock, reported in Table **8.7**, over the seven year period are:

- a decrease was faced by all local authorities and Scotland for the public administration, other community, social and personal services (ranging from 3% to 8% decrease); and

- an increase in real estate, renting and business activities was experienced by all areas and accounted for the largest increase for East and South Ayrshire and Scotland.

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Table 8.7: Changes in Business Stock by Industry (2000, 2007)

	North Ayrshire		East Ayrshire		South Ayrshire		Scotland	
	2007	% Change	2007	% Change	2007	% Change	2007	% Change
Agriculture; Forestry and fishing	530	-15%	265	-5%	470	-9%	19,070	-6%
Mining and quarrying; Electricity, gas and water supply	0	0%	5	0%	0	-100%	405	25%
Manufacturing	170	0%	205	-11%	160	-6%	8,745	-1%
Construction	340	32%	390	26%	320	21%	16,710	25%
Wholesale, retail and repairs	590	2%	600	-2%	665	-4%	27,075	-2%
Hotels and restaurants	240	11%	340	12%	350	13%	13,115	14%
Transport, storage and communication	115	12%	140	10%	135	17%	5,650	11%
Financial intermediation	10	100%	10	0%	10	0%	1,030	11%
Real Estate, renting and business activities	465	32%	535	43%	705	42%	38,825	42%
Public administration; Other community, social and personal services	200	-8%	175	-7%	240	-6%	9,195	-3%
Education; health and social work	30	0%	30	20%	45	29%	2,075	25%
Total	**2,690**	**9%**	**2,695**	**7%**	**3,100**	**8%**	**141,895**	**12%**

Source: Nomis - VAT Registrations/Deregistrations by Industry

Turnover and GVA by Industry Sector

Information regarding turnover and GVA by industry sector is available at local and national level. The most up to date information is 2010 with comparison made against 2008. It should be noted that the industry sectors differ slightly to the BRES definition used earlier in the report therefore a direct comparison can not be made (**Table 8.8**).

Table 8.8: Total Turnover and GVA by Industry Sector (2008-2010)

	Turnover (£m)r	% change	GVA (£m)	% Change
East Ayrshire				
Primary Industries	251.5	-12%	84	-33%
Manufacturing	345.4	-14%	122	-29%
Construction	211.8	-22%	81.6	-34%
Wholesale, retail and repairs	845.6	-4%	141.2	-2%
Transport and storage	121.8	96%	67.4	88%
Accommodation and food service activities	67.0	172%	24.3	127%
Insurance, reinsurance, professional, scientific and technical activities	72.5	-14%	45.3	-19%
Real estate activities	18.3	34%	8.9	-4%
Administrative and support service activities	263.5	9%	174	24%
Education, human health and social work activities	56.2	45%	36.1	51%
Arts, entertainment and recreation	124.8	-13%	20.2	-32%
Other service activities	16.0	19%	9.6	28%

North Ayrshire				
Primary Industries	*	*	*	*
Manufacturing	1,040.6	-10%	325.4	12%
Construction	196.6	-17%	90.2	-20%
Wholesale, retail and repairs	892.7	-2%	162.8	-11%
Transport and storage	120.0	-6%	64	-16%
Accommodation and food service activities	106.5	86%	41.6	60%
Information and communication	49.2	-22%	27.5	-30%
Insurance, reinsurance, professional, scientific and technical activities	68.9	-12%	41.4	-21%
Real estate activities	27.5	20%	12.2	-25%
Administrative and support service activities	122.2	37%	56.2	32%
Education, human health and social work activities	70.6	40%	44.1	44%
Arts, entertainment and recreation	172.5	-5%	23	-44%
Other service activities	*	*	*	*
South Ayrshire				
Primary Industries	*	*	*	*
Manufacturing	1,040.6	-10%	325.4	12%
Construction	196.6	-17%	90.2	-20%
Wholesale, retail and repairs	892.7	-2%	162.8	-11%
Transport and storage	120.0	-6%	64	-16%
Accommodation and food service activities	106.5	86%	41.6	60%
Information and communication	49.2	-22%	27.5	-30%
Insurance, reinsurance, professional, scientific and technical activities	68.9	-12%	41.4	-21%
Real estate activities	27.5	20%	12.2	-25%

Administrative and support service activities	122.2	37%	56.2	32%
Education, human health and social work activities	70.6	40%	44.1	44%
Arts, entertainment and recreation	172.5	-5%	23	-44%
Other service activities	*	*	*	*
Scotland				
Primary Industries	53398.3	-5%	23126.8	-17%
Manufacturing	34496.2	-15%	12354.5	-5%
Construction	15955	-12%	5963.2	-25%
Wholesale, retail and repairs	57554.2	3%	10059.6	-15%
Transport and storage	8957.1	-2%	4480.7	-6%
Accommodation and food service activities	5746.7	9%	2830.9	7%
Information and communication	6862.5	7%	3012	-12%
Insurance, reinsurance, professional, scientific and technical activities	41229.2	19%	24158.3	20%
Real estate activities	2535.5	18%	1214.4	-14%
Administrative and support service activities	9601.3	-11%	4842.4	-12%
Education, human health and social work activities	4376	17%	2371	30%
Arts, entertainment and recreation	6718.6	-2%	1150	-20%
Other service activities	1430.7	6%	689.3	-4%

Source:

9. Unemployment

This section details information regarding unemployment which is defined by the Claimant Count. The claimant count measures the number of people unemployed by those claiming job seekers allowance. **Table 9.1** details the unemployment rate of those of working age i.e. 16 to 64 years old.

Table 9.1: Unemployment Rate – 16-64 years old (%)

	2007	2011	% Point Change
North Ayrshire	6.3	13.8	7.5
East Ayrshire	6.9	10.7	3.8
South Ayrshire	4.9	11.1	6.2
Scotland	**4.8**	**8.2**	**3.4**

Source: Nomis - ABI

In all three local authorities, the unemployment rate was above the national rate. This difference has increased by 2011.The unemployment rate has experienced an increase across all three of the local authority areas as well as at the national level. North Ayrshire experienced the largest increase, 7.5 percentage points, of over twice as much as the national level increase resulting in an unemployment rate of 13.8%.

Table 9.2 and Table 9.3 detail the change in Claimant Count between 2007 and 2012 across all geographic areas.

Table 9.2: Claimant Count (Feb 2007-2012)

	2007	2012	Change	% Change
Rural North Ayrshire	45	215	170	378%
Rural E Ayrshire	460	970	510	111%
Rural South Ayrshire	200	440	240	120%
LEADER N Ayrshire	645	1,155	510	79%
LEADER E Ayrshire	1,250	2,480	1,230	98%
LEADER S Ayrshire	385	815	430	112%
North Ayrshire	4,030	5,820	1790	44%
East Ayrshire	3,010	4,905	1,895	63%
South Ayrshire	2,145	3,335	1,190	55%
Scotland	**89,360**	**151,565**	**62,205**	**70%**

Source: Nomis – Claimant Count

All areas have experienced an increase in the number of people claiming Jobs Seekers Allowance between the period of February 2007 and February 2012. Rural North Ayrshire experienced the largest proportionate increase, 378% over the five year period. All rural and LEADER areas were significantly above their local authority and the Scottish level (70%).

Table 9.3: Total Rural and Total LEADER Claimant Count (Feb 2007-2012)

	2007	2012	Change	% Change
Rural Ayrshire	705	1,625	920	127%
LEADER Ayrshire	2,280	4,450	2,170	95%

Source: Nomis – Claimant Count

Incapacity Benefit/Severe Disability Allowance Claimants

Incapacity Benefits (IB) and Severe Disability Allowance (SDA) Claimants is defined as individuals that are unable to work and meet certain conditions. **Table 9.4** and **Table 9.5** show the relevant data between February 2007 and February 2012.

Table 9.4: IB/SDA Claimants (Feb 2007- Feb 2012)

	2007	2012	Change	% Change
Rural North Ayrshire	575	345	-230	-40.0%
Rural East Ayrshire	2,425	1,375	-1,050	-43.3%
Rural South Ayrshire	1,275	775	-500	-39.2%
LEADER N Ayrshire	2,405	1,415	-990	-41.2%
LEADER E Ayrshire	5,095	2,900	-2,195	-43.1%
LEADER S Ayrshire	2,105	1250	-855	-40.6%
North Ayrshire	8,980	5,270	-3,710	-41.3%
East Ayrshire	7,850	4,550	-3,300	-42.0%
South Ayrshire	6,160	3,780	-2,380	-38.6%
Scotland	**308,630**	**177,460**	**-131,170**	**-42.5%**

Source: Nomis – DWP Benefits

Table 9.4 shows that the number of IB/SDA claimants has decreased for all areas by roughly -40%. South Ayrshire and rural South Ayrshire experience the smallest percentage decrease (38.6% and 39.2% respectively). Rural and LEADER East Ayrshire experienced the largest percentage decrease c.43%, greater than the Scottish level.

Table 9.5: Total Rural and Total LEADER IB/ESA Claimants (Feb 2007- Feb 2012)

	2007	2012	Change	% Change
Rural Ayrshire	4,275	2,495	-1,780	-42%
LEADER Ayrshire	9,605	5,565	-4040	-42%

10. Other Sectors

10.1 Community and Social Enterprise

Social Enterprise

Each local authority has third sector interface organisations that support social enterprise development in Ayrshire. The Ayrshire Community Trust (TACT) supports social enterprises in North Ayrshire, the Council of Voluntary Organisations East Ayrshire (CVOEA) in East Ayrshire, and Voluntary Action South Ayrshire (VASA) in South Ayrshire.

These organisations offer advice and support for social enterprises. They provide assistance with legal issues, compliance with regulations and act as a gateway to funding organisations. Also available is help with organisation and management structure as well as training opportunities, often in conjunction with local further education providers.

Voluntary Actions South Ayrshire (VASA) were able to provide a rough guide to the number of social enterprises operating within the whole of South Ayrshire, as of 2006 there was roughly 130-150 social enterprises.

Arran has circa12 social enterprise (including six golf courses, one child care, village hall, social clubs, Arran National Trust).

10.2 Renewable Industry Sector

Information is readily available for the provision and future development of wind turbines within Ayrshire via various internet sites. Information has been analysed at local authority level (**Table 10.1**).

Wind Farms

Table 10.1: Wind Farms

	Active turbines	Planned turbines
North Ayrshire	71	21
East Ayrshire	235*	236
South Ayrshire	88	77
Ayrshire	394	334
Scotland	**-**	**-**

The current 394 wind turbines in Ayrshire are split into seven different sites. The major sites are Hadyard hill in North Ayrshire with 52 turbines, Arecleoch in South Ayrshire with 60 turbines and Whitelee partially in East Ayrshire with 235 turbines. Whitelee is a particularly large windfarm and straddle East Ayrshire and South Lanarkshire.

Of the 334 planned turbines, the majority are in East Ayrshire with a 75 turbines extension of Whitlee, the 59 turbine Harelaw renewable energy park and five other smaller projects ranging in size from seven to 27 turbines. Two projects are planned for North Ayrshire and five planned for South Ayrshire with none exceeding 23 turbines (source of information: local authorities' websites).

Furthermore, there are a number of projects at the scoping stage of development. It is too early to give a precise estimate of the amount of turbines planned. Of these projects, two are in East Ayrshire, four are in North Ayrshire and six are in South Ayrshire.

10.3 Broadband Provision

Information was available on broadband speeds and availability from BT at the local authority levels with average provision outline in **Table 10.2** and superfast broadband provision in **Table 10.3**. A map is also presented in Annex C – Capital Asset Report of the Rural Study for further information.

Table 10.2: Broadband Provision by Local Authority (2012)

	Average Speed	Score	% < 2Mb/s	Score	Take up	Score
North Ayrshire	8.7	4	10.3%	4	65.9%	3
East Ayrshire	6.8	3	19.4%	3	63.5%	3
South Ayrshire	8.2	3	11.9%	3	65.3%	3

Source: BT

North and South Ayrshire have average current broadband provision compared to the UK average. East Ayrshire, however, has relatively poor broadband provision compared to the UK average. Further analysis is difficult due to the lack of data at datazone level.

We understand that superfast broadband has recently been connected in Kilmarnock, Ardrossan, Stanecastle and Troon which is not taken into account in the above figures.

Table 10.3: Super Fast Broadband Provision at Local Authority Level (2013)

	Available	End 2013	End 2014	Not planned
North Ayrshire	7%	6%	36%	51%
East Ayrshire	16%	33%	0%	52%
South Ayrshire	2%	24%	2%	71%
Ayrshire	**10%**	**22%**	**12%**	**56%**

Source: BT

The BT superfast broadband network across Ayrshire can be regarded as relatively poor, with only four active exchanges in Kilmarnock, Ardrossan, Stanecastle and Troon. An exchange in Ayr is expected to be active by June 2013, exchanges in Cumnock, Darvel, Stewarton, Irvine, Kilwinning, Prestwick and Girvan are expected to be active by the end of 2013 and exchange upgrades in Kilbirnie, Alloway, Beith and Dalry are planned by the end of 2014.

Network Coverage will still be poor after all of the planned upgrades with 56% of rural areas without access to superfast broadband. The situation is particularly difficult in south Ayrshire with 71% of rural areas without access to superfast broadband for the foreseeable future.

11. Comparator Review

11.1 Introduction

This Chapter provides a review of the LEADER North, East and South Ayrshire areas in comparison to the LEADER Forth Valley and Lomond (FVL) area. LEADER FVL was chosen as it is the most similar to Ayrshire in terms of population and population density per sq km, **Table 11.1**.

Table 11.1: Determining Factors

Area	LEADER Funding 2007 - 2013	Area sq km	Pop'n	Pop'n Density per sq km	Key LEADER Programme Themes	
Ayrshire	£4.5m	2,819	148,843	52.8	Revitalising Rural Communities	Rebuilding Rural Community Capacity
Forth Valley & Lomond	£3.73m	2,656	128,733	48.5	Revitalising Rural Communities	Conservation of the Rural Environment

Source: South Ayrshire Council

The LEADER FVL area includes rural Falkirk, Clackmannanshire, Stirling and part of West Dunbartonshire lying within the Loch Lomond and the Trossachs National Park. (It excludes Alloa, Bo'ness, Falkirk, Grangemouth, Polmont, Stenhousemuir and Stirling City).

Analysis has been undertaken for the LEADER areas by combining the datazones from each of the four local authority areas forming part of the LEADER FVL (**Table 11.2**).

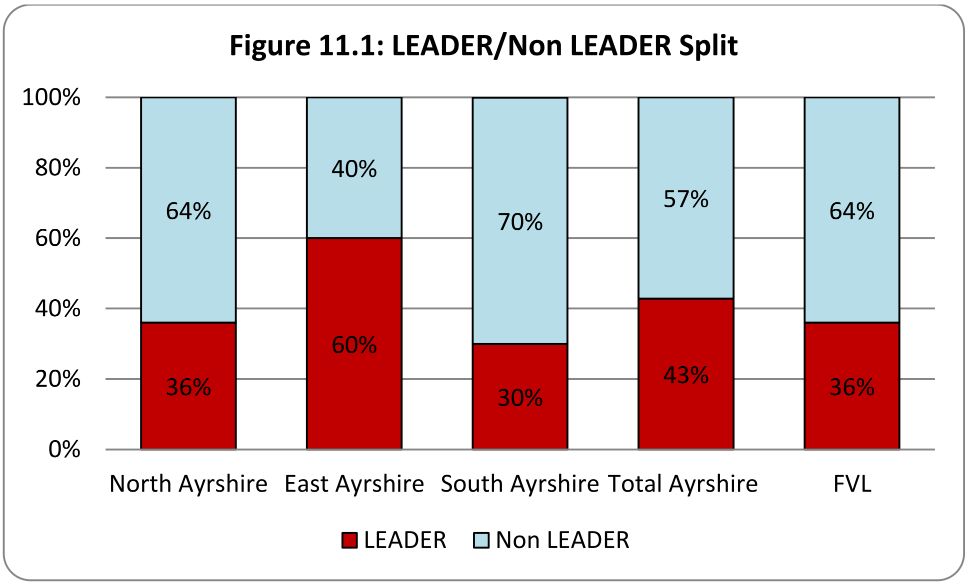
Table 11.2: LEADER/Non LEADER Split

	LEADER	Non LEADER	Total
North Ayrshire	64	115	179
East Ayrshire	92	62	154
South Ayrshire	44	103	147
Total Ayrshire	**200**	**280**	**480**
FVL	**177**	**312**	**489**

Source: South Ayrshire Council, Stirling Council and SNS

Figure 11.1 details the breakdown figuratively.

The LEADER/Non LEADER split in FVL is the same as in North Ayrshire whilst East Ayrshire has a greater proportion of LEADER areas.



Source: South Ayrshire Council, Stirling Council and SNS

11.2 Demographics

Population

In 2011, LEADER FVL had a total population of 143,543 relatively similar to the total population within LEADER Ayrshire (155,428) with the gender make up across all three of the Ayrshire areas as well as FVL following closely to the national average of male 48% and female 52%, **Table 11.3**.

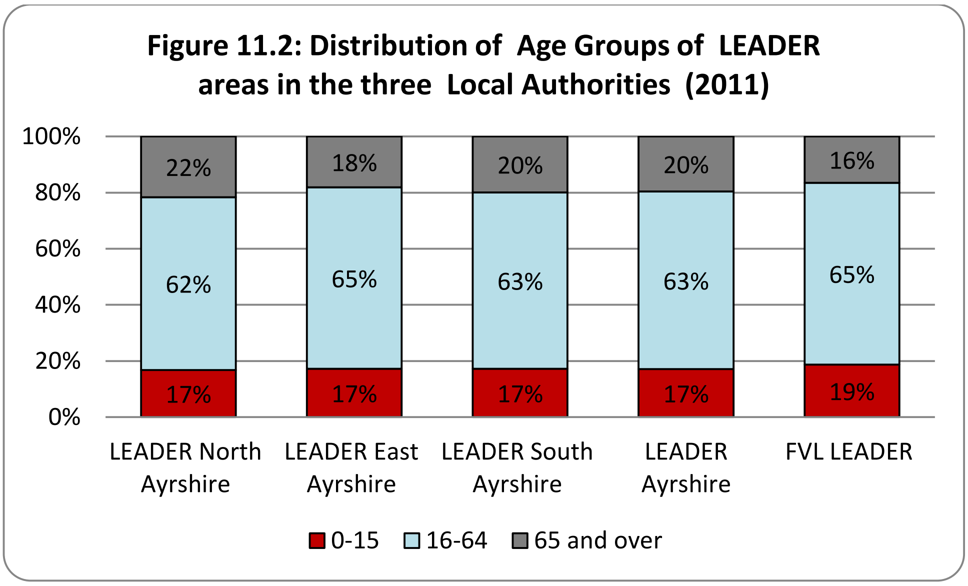
Table 11.3: Gender (2011)

	Male	Female
LEADER N Ayrshire	48%	52%
LEADER E Ayrshire	48%	52%
LEADER S Ayrshire	49%	51%
LEADER Ayrshire	**48%**	**52%**
LEADER FVL	**49%**	**51%**

Source: SNS – mid year population estimate

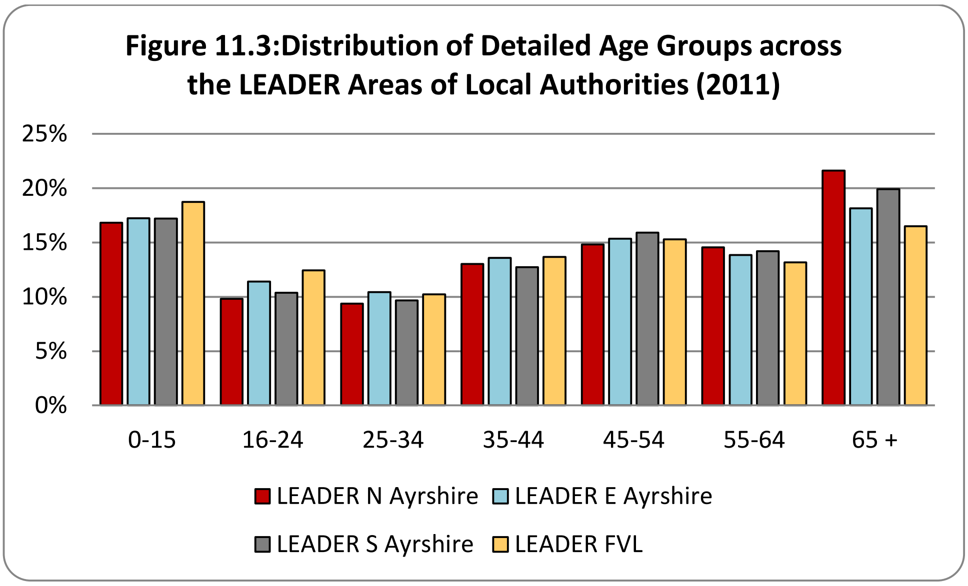
Age

Figure 11.2 shows that the area of LEADER FVL has a lower percentage of individuals aged 65 and over, accounting for less than one fifth of its area's population (16%). This is considerably lower than in the Ayrshire LEADER area which has 20% of the over 65 year group.

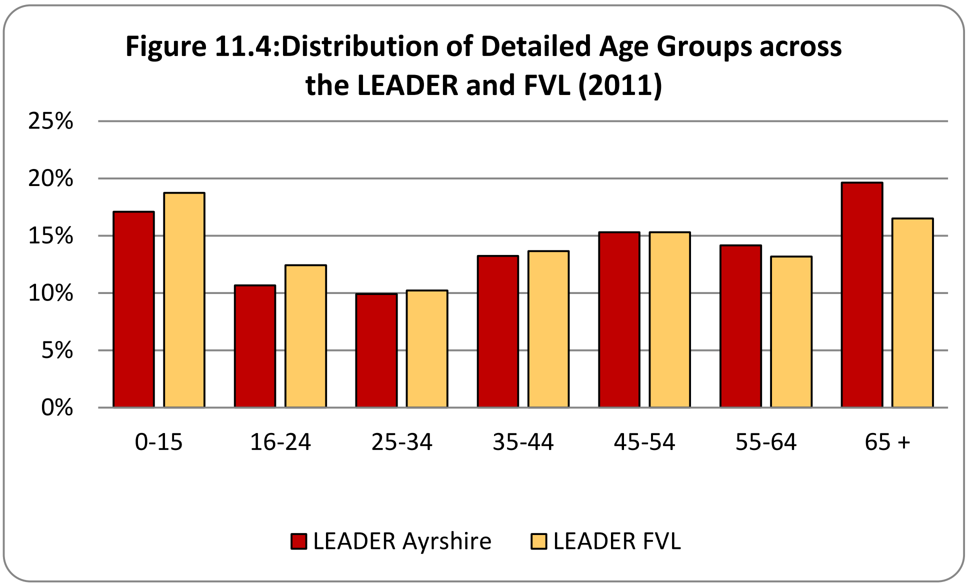


Source: SNS

Looking in more detail at the age categories, **Figure 11.3 and Figure 11.4** highlight that the FVL area has a higher percentage of younger population i.e. 0-24 years old, circa 31%with the older age groups 55 + being below that of all LEADER Ayrshire areas.



Source: SNS



Source: SNS

Population Trend

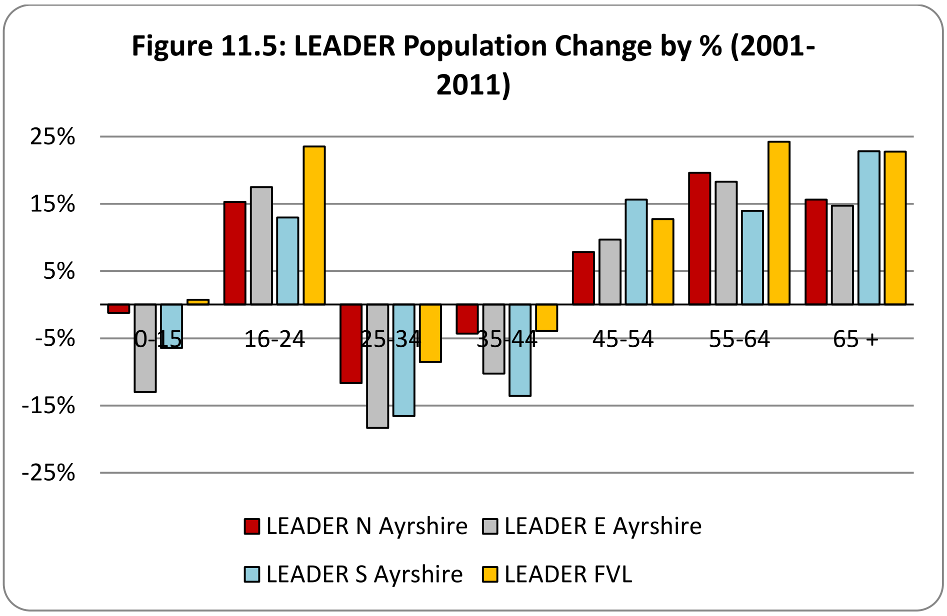
Over the ten year period of 2001 to 2011, both LEADER areas experienced an increase in population, ranging from a low of 1% to a high of 9% with LEADER FVL experiencing the largest increase, **Table 11.4**.

Table 11.4: Total Population Trend 2001-2011

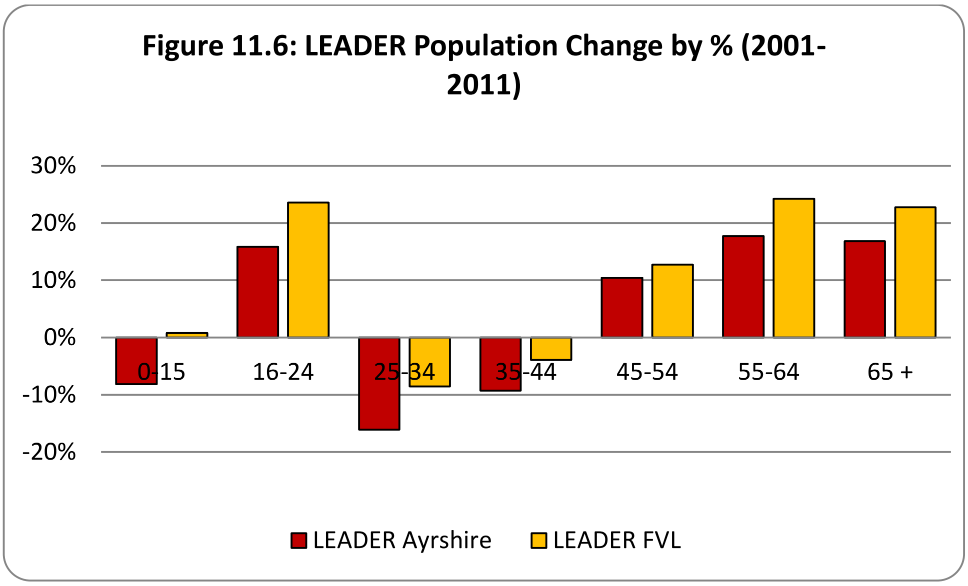
	2001	2011	Change	% Change
LEADER North Ayrshire	47,620	50,476	2,856	6%
LEADER East Ayrshire	72,422	73,191	769	1%
LEADER South Ayrshire	34,974	36,297	1,323	4%
LEADER Ayrshire	**152,428**	**157,153**	**4,725**	**3%**
LEADER FVL	**131,470**	**143,453**	**11,983**	**9%**

Source: SNS – mid year population estimate

Focusing in more depth on the trend in age categories, **Figure 11.5 and Figure 11.6**, LEADER Ayrshire and LEADER FVL follow a similar population trend with 0-15 year old and 25-44 experiencing a decrease with the remaining four age groups, 16-24 and 45+ experiencing an increase. However, the LEADER FVL area specifically experienced an increase of circa one quarter (25%) of 16-24 year olds and a higher increase in the 55-64 age group.



Source: SNS



Source: SNS

11.3 Housing

This sections details housing within the Ayrshire and FVL LEADER areas. The data demonstrate that the FVL area is fairly similar in structure than the Ayrshire LEADER area, but has a higher percentage of owned property with mortgage or loan, **Table 11.5**.

Table 11.5: Housing Tenure (2001)

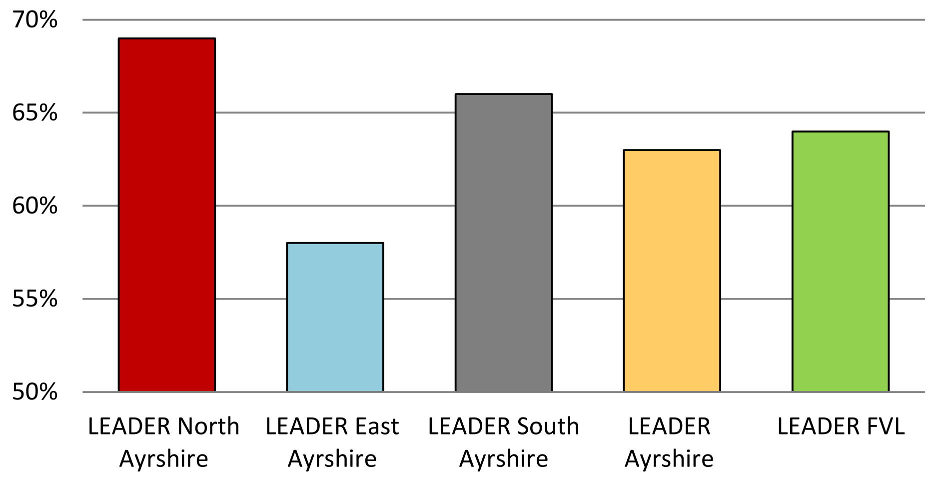
	Owned Outright	Owned Mortgage/ Loan	Shared Own'p	Council Rented	Private Let	Other Social	Rented from Employer	Rented from Relative	Other
LEADER North Ayrshire	33%	36%	0.3%	21%	3%	5%	1%	1%	0.4%
LEADER East Ayrshire	21%	37%	0.2%	35%	3%	3%	0.5%	1%	0.3%
LEADER South Ayrshire	29%	37%	0.3%	23%	2%	6%	1%	1%	0.4%
LEADER Ayrshire	**26%**	**36%**	**0.2%**	**28%**	**3%**	**4%**	**1%**	**1%**	**0.4%**
LEADER FVL	**25%**	**39%**	**0.5%**	**26%**	**3%**	**4%**	**1%**	**1%**	**0.4%**

Source: SNS

LEADER Ayrshire has a slightly higher percentage of Council Rented accommodation with East Ayrshire having the highest percentage of council rented houses (35%), considerably higher than the three other areas including FVL.

Figure 11.7 illustrates the combined values for house ownership, owned outright and by mortgage/loan. The figure demonstrates that LEADER FVL has a higher percentage than its Ayrshire counterpart, but at the same time, North and South Ayrshire have individually the highest values.

Figure 11.7:Combined housing owned outright or mortgage/loan

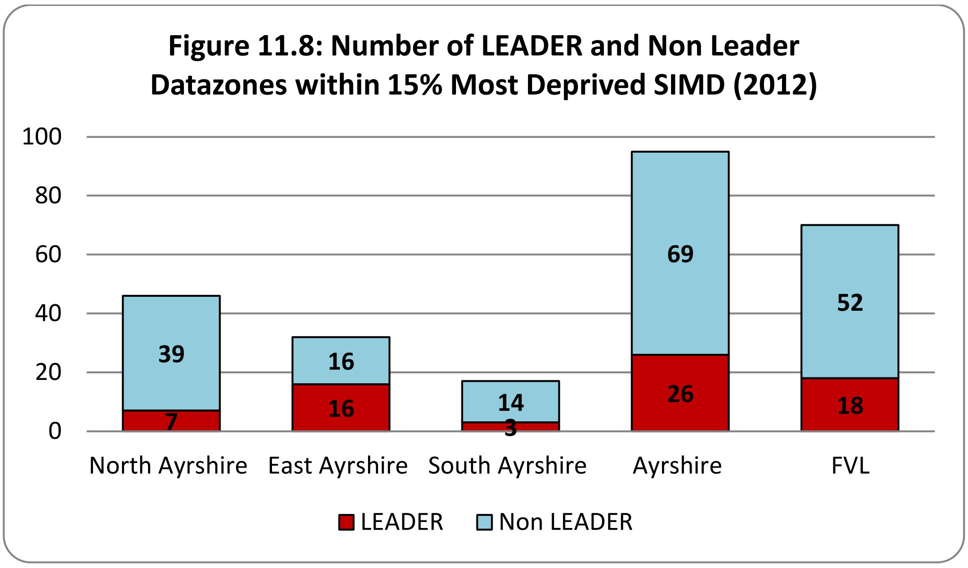


Source: SNS

11.4 Poverty and Deprivation

Data has been sourced from the Scottish Index of Multiple Deprivation (SIMD) to determine the level of deprivation in each of the areas. **Figure 11.8** details the number of datazones within each area categorised within the 15% most deprived areas.

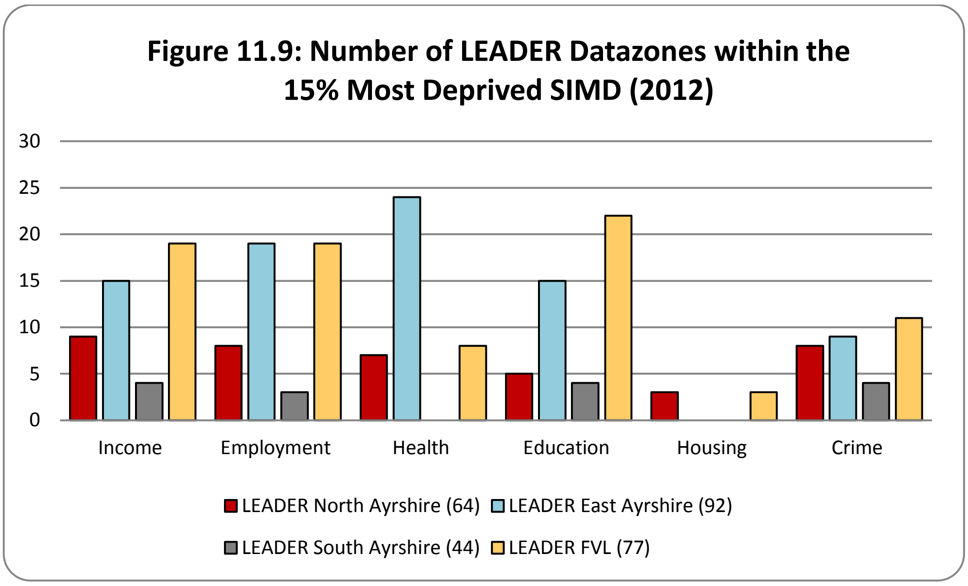
The four local authorities relating to the LEADER FVL area have a total of 56 of the 15% most deprived datazones with roughly one third (18 datazones) of these being located within LEADER areas (32%). When comparing SIMD to the total area within Ayrshire, FVL has a marginally higher level of deprivation (5%) however when compared to the individual areas within Ayrshire, LEADER East Ayrshire is the most deprived with 50% of all 15% most deprived datazones within East Ayrshire being located within the LEADER area.



Source: Scottish Index of Multiple Deprivation (2012)

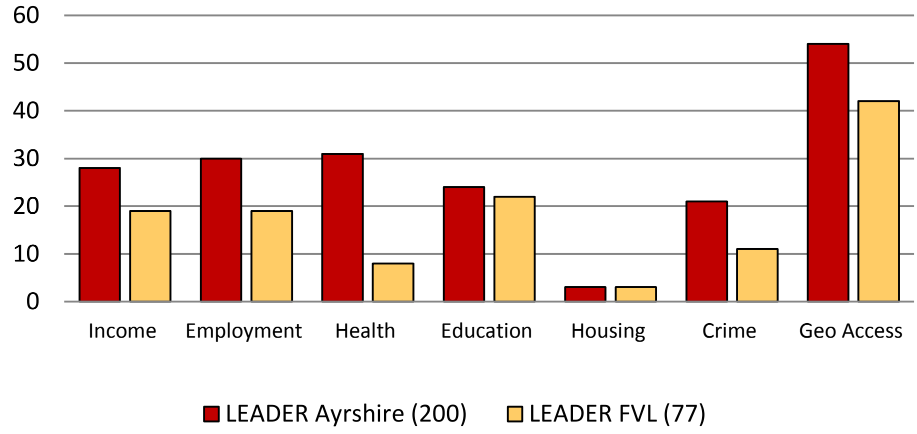
Figure 11.9 and **Figure 11.10** provide further detail by the six most commonly cited categories: Income; Employment; Health; Education; Housing; Crime; and Geographic access (Figure 3.10 only).

By comparing the data between the two LEADER areas (Figure 3.10), the data show that the Ayrshire LEADER area is – apart from housing where it shows similar values - more deprived than FVL in every SIMD domain.



Source: SIMD

Figure 11.10: Number of LEADER Datazones within the 15% Most Deprived SIMD (2012)



Source: SIMD

Drive Time

Drive time has been determined by analysing the percentage of datazones within a five mile drive or less of various facilities, **Table 11.6** details the results.

Table 11.6: Percentage of Datazones within 5 miles of Key Services (2006-2009)

	GP		Post Office		Primary School		Secondary School		Shopping Facilities	
	2006	2009	2006	2009	2006	2009	2006	2009	2006	2009
LEADER North Ayrshire (n=64)	83%	92%	91%	94%	95%	100%	42%	55%	56%	75%
LEADER North Ayrshire (n=92)	80%	97%	90%	100%	90%	100%	30%	71%	32%	60%
LEADER North Ayrshire (n=44)	80%	89%	91%	100%	100%	100%	36%	55%	32%	45%
Total LEADER Ayrshire (n=200)	**81%**	**94%**	**91%**	**98%**	**94%**	**100%**	**36%**	**62%**	**40%**	**62%**
LEADER FVL (n=177)	**81%**	**94%**	**97%**	**100%**	**97%**	**98%**	**35%**	**82%**	**56%**	**84%**

Source: SNS

All areas have experienced an increase between 2006 and 2009 whereby the FVL LEADER area has improved more than Ayrshire in both access to secondary school and shopping facilities (82% and 84% respectively).

11.5 Employment

This section details employment within the Ayrshire and FVL LEADER areas.

Working Age Population

The working age population, defined as individuals aged between 16-64 years old, is detailed in **Table 11.6**. LEADER FVL has a slightly higher percentage of working age population as LEADER East Ayrshire (63% and 65%) respectively.

Table 11.6: Working Age Population (2011)

	Number	% of total population
LEADER N Ayrshire	31,074	62%
LEADER E Ayrshire	47,296	65%
LEADER S Ayrshire	22,738	64%
LEADER Ayrshire	**101,108**	**63%**
LEADER FVL	**92,905**	**65%**

Source: SNS – mid year population estimate

Employment by Industry Sector

Employment data is available between 2008 and 2011. It should be noted that the term “employment” refers to employees and proprietors of the business. Employment as of 2011 in the following areas was:

- LEADER Ayrshire – 54,657 employees; and
- LEADER Forth Valley and Lomond – 41,839 employees.

As **Table 11.7** shows, both LEADER areas have experienced a loss in employment, however in total the Ayrshire LEADER area has lost double the amount of employees than FVL (-3,664 and -1,806 respectively). Greatest losses have been experienced in Ayrshire’s manufacturing sector and in public administration and defence. However, Ayrshire has increased employment well in sectors such as business administration and support services (an area where FVL LEADER has decreased in employment) and in health where both LEADER areas gained significant increases.

Table 11.7: Employment by Total LEADER Ayrshire and FVL Datazone (2008-11)

	LEADER Ayrshire			LEADER FVL		
	2008	2011	Change	2008	2011	Change
Agriculture, forestry & fishing	382	304	-78	284	183	-101
Mining, quarrying & utilities	2,412	1,974	-438	899	765	-134
Manufacturing	8,886	6,818	-2,068	5,850	5,561	-289
Construction	3,749	3,205	-544	4,159	3,337	-822
Motor trades	983	862	-121	596	586	-10
Wholesale	1,672	1,569	-103	1,381	1,610	229
Retail	4,397	4,259	-138	3,541	3,536	-5
Transport & storage	2,601	2,209	-392	1,946	1,865	-81
Accommodation & food services	4,336	4,265	-71	5,596	5,087	-509
Information & communication	737	336	-401	491	369	-122
Financial & insurance	405	284	-121	297	134	-163
Property	337	369	32	666	452	-214
Professional, scientific & technical	1,296	1,558	262	1,734	2,078	344
Business administration & support services	2,719	3,590	871	1,937	1,334	-603
Public administration & defence	2,881	1,552	-1,329	1,237	1,161	-76
Education	3,410	3,081	-329	5,980	5,731	-249
Health	12,891	14,129	1,238	5,245	6,343	1,098
Arts, entertainment, recreation & other services	2,219	2,282	63	1,806	1,707	-99
Total	58,321	54,657	-3,664	**43,645**	**41,839**	**-1,806**

Business Base

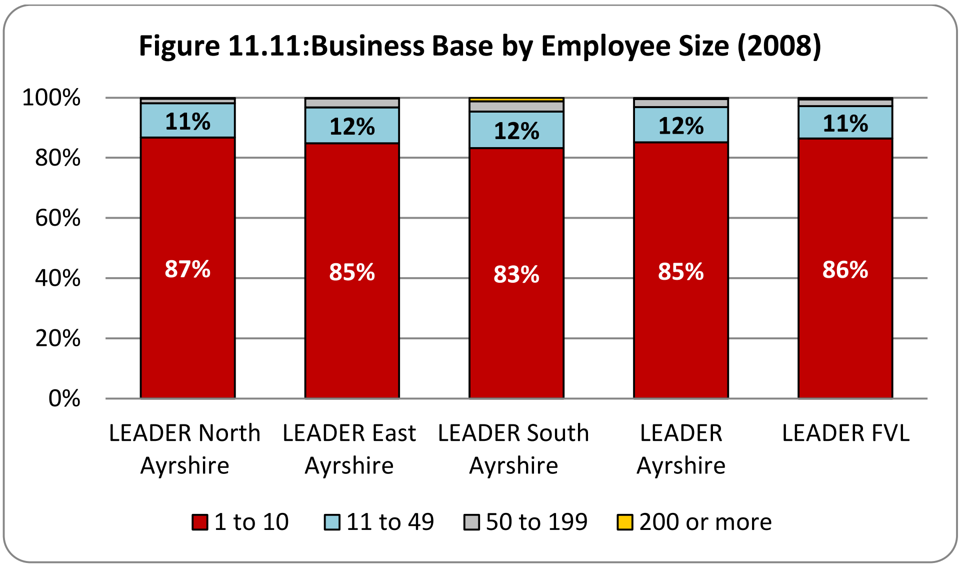
As mentioned earlier, data regarding the business base is only available between 2007/08, therefore, it is a number of years out of date. The number of businesses situated within the FVL and Ayrshire LEADER areas increased during the period with FVL experiencing the largest increase (5%). LEADER North Ayrshire was the only area to experience a decrease in business base (-2%), **Table 11.8**.

Table 11.8: Business Base (2007-2008)

Business Base	2007	2008	Change	% Change
LEADER N Ayrshire	1,619	1,590	-29	-2%
LEADER E Ayrshire	1,971	2,032	61	3%
LEADER S Ayrshire	1,074	1,099	25	2%
LEADER Ayrshire	**4,664**	**4,721**	**57**	**1%**
LEADER FVL	**4,324**	**4,523**	**199**	**5%**

Source: ABI

Almost all businesses operating within the LEADER areas were SME's employing between 1 and 49 employees, **Figure 11.11**, details.



Source: ABI

Focusing in more detail at business base trend by employee size, **Table 11.9 and Table 11.10**, all areas experienced an increase in the number of businesses employing between 1-10 members of staff. However, the FVL LEADER area experienced almost double as much growth than the Ayrshire LEADER area.

In the business size group 11-49 employees, Ayrshire LEADER area suffered a decrease in numbers mainly due to the losses experienced in North Ayrshire. For FVL LEADER the data show a small, but positive increase.

The number of larger businesses (50-199 employees) decreased in both LEADER areas to similar extent. And the figure for large companies was too small to be disclosed for confidentiality reasons in both LEADER areas.

Table 11.9: Business Base by Employee Numbers - LEADER Locations (2007-2008)

	LEADER North Ayrshire			LEADER East Ayrshire			LEADER South Ayrshire		
	2007	2008	Change	2007	2008	Change	2007	2008	Change
1 to 10	1,363	1,380	17	1,667	1,723	56	894	915	21
11 to 49	208	180	-28	241	243	2	128	133	5
50 to 199	38	25	-13	57	60	3	40	38	-2
200 or more	*	*	-	*	*	/	*	*	+

Source: ABI

* data is too small to be disclosed for confidentiality reasons, - indicates a decrease, / no change and + an increase

Table 11.10: Business Base by Employee Numbers - LEADER Locations (2007-2008)

	LEADER Ayrshire			LEADER FVL		
	2007	2008	Change	2007	2008	Change
1 to 10	3,924	4,018	94	3,710	3,908	198
11 to 49	577	556	-21	480	488	8
50 to 199	135	123	-12	114	103	-11
200 or more	*	*	+	*	*	+

11.6 Unemployment

This section details information regarding unemployment which is defined by the Claimant Count. The claimant count measures the number of people unemployed by those claiming job seekers allowance.

Similar to Ayrshire trends, FVL has experienced an increase in those individuals claiming Jobs Seekers Allowance (JSA) captured in Claimant Count data, **Table 11.11**. All areas experienced an increase from 79% upwards. FVL experienced the largest percentage increase (206%), but also started at a much lower point than LEADER Ayrshire with the actual number of claimants in 2012 being less than that of the Ayrshire LEADER area (1,600 claimants in FVL and 2,170 claimants in Ayrshire).

Table 11.11: Claimant Count (Feb 2007-2012)

	2007	2012	Change	% Change
LEADER North Ayrshire	645	1,155	510	79%
LEADER East Ayrshire	1,250	2,480	1,230	98%
LEADER South Ayrshire	385	815	430	112%
LEADER Ayrshire	**2,280**	**4,450**	**2,170**	**95%**
LEADER FVL	**775**	**2,375**	**1,600**	**206%**

Source: Nomis – Claimant Count

The percentage of male claimants decreased across all areas with the opposite occurring for female claimants, mostly LEADER Ayrshire experienced an 18.1 percentage point change from male to female claimants, **Table 11.12.**

Table 11.12: Percentage Change by Gender (Feb 2007-2012)

	Male		Female	
	2012	% Point Change	2012	% Point Change
LEADER North Ayrshire	435	-4.0%	135	4.0%
LEADER East Ayrshire	825	-38.7%	440	38.7%
LEADER South Ayrshire	210	-7.6%	95	7.6%
LEADER Ayrshire	**1470**	**-18.1%**	**670**	**18.1%**
LEADER FVL	**1,905**	**-10.8%**	**470**	**10.8%**

Source: Nomis – Claimant Count
Due to data rounding (all data is rounded to the nearest 5%) total numbers are marginally different when compared to Table 11.11.

Incapacity Benefit/Severe Disability Allowance Claimants

Incapacity Benefits (IB) and Severe Disability Allowance (SDA) Claimants is defined as individuals that are unable to work and meet certain conditions. All areas have experienced a decrease of above 40% between the period of February 2007 and 2012 with the FVL LEADER area being slightly below the Ayrshire LEADER area decreases, **Table 11.13**.

Table 11.13: IB/ESA Claimants (Feb 2007- Feb 2012)

	2007	2012	Change	% Change
LEADER North Ayrshire	2,405	1,415	-990	-41.2%
LEADER East Ayrshire	5,095	2,900	-2,195	-43.1%
LEADER South Ayrshire	2,105	1,250	-855	-40.6%
LEADER Ayrshire	**9,605**	**5,565**	**-4,040**	**-42.1%**
LEADER FVL	**7,205**	**4,200**	**-3,005**	**-41.7%**

Source: Nomis – DWP Benefits

Table 11.13 shows that both areas experienced a similar decrease in claimant numbers (-4,040 in Ayrshire; -3,005 in FVL).