CR Cameron Research
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South Ayrshire Town Centre Assessment

Ayr Town Centre: Shopper and Resident Surveys

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Cameron Research
67 St Ninians Road
Prestwick KA9 1SL
Tel: 01292 678373

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Appendices (under separate cover)

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1.0 SURVEY BACKGROUND, OBJECTIVES AND METHODOLOGY

Background

1.1 South Ayrshire Council, along with Project Partners, has been awarded funding from the European Regional Development Fund's INTERREG IVA Programme for delivery of the Business Improvement Districts (BIDS) Project. The Project has been funded through Priority 2, Theme 1: Public Sector Collaboration.

1.2 A Joint Committee of 5 local authorities (Ballymena Borough Council, Coleraine Borough Council, Larne Borough Council, Sligo County Council and South Ayrshire Council) has been established with Ballymena Borough Council acting in role of Lead Partner. A Partnership Agreement has been produced to provide governance guidelines and an operating framework.

1.3 The purpose of the study is to gauge the views and priority issues of customers, businesses and residents of the towns. The town centres to be included are: Ayr, Girvan, Maybole, Prestwick, and Troon. The issues to be investigated include public space and environment, accessibility and events. Cameron Research, in partnership with IBP Strategy and Research, were appointed to conduct a series of surveys to establish the views and priority issues of customers, businesses and residents of the towns and their landward villages.

Objectives

1.4 This analysis will inform the development of town centre plans in South Ayrshire to deliver improvements for businesses, shoppers and residents. Overall, the purpose is to inform the South Ayrshire Strategy Plan to provide consumers with a compelling reason to use the shops and services of each town centre. This work will help to inform the strategy and planning process and provide a baseline against which future initiatives can be measured.

1.5 Four distinct surveys were conducted in August 2014:

- **shopper/customer survey:** recruited from within each of the 5 town centres to collect information on their specific shopping trip/services visit, plus perceptions and attitudes towards the town centre offering
- **resident survey:** recruited within the settlement boundary of each of the 5 towns and landward villages to expand the information gathered from the town centre surveys
- **commercial operators/business survey**: to determine issues and concerns regarding the area, from the business perspective
- **South Ayrshire resident survey**: representative population survey within South Ayrshire to ask specifically about usage of, and attitudes towards, Ayr town centre.

1.6 For shoppers and residents, questions included demographics, shopping locations, frequency of visits, shopping patterns, perceptions of safety and cleanliness, awareness of offer, spend profile, areas for improvement and alternative shopping locations.

1.7 For businesses, questions includes size and type of business, trading operations, perceptions of trading circumstances, assessment of town centre facilities, potential barriers to business and areas for improvement.

1.8 **This document presents the key findings for the Ayr Shoppers and Residents surveys. The Business surveys and the South Ayrshire Residents survey are detailed in separate reports.**

Methodology

1.9 **Shopper Survey**: 263 face-to-face interviews were undertaken with shoppers in Ayr Town Centre. Shoppers were randomly recruited at four locations: High Street outside entrance to Kyle Shopping Centre, Junction of High Street/Kyle Street (near Ayr Central Shopping Centre), Newmarket Street/Sandgate.

1.10 **Residents Survey**: 160 face-to-face interviews were undertaken with residents within Ayr town centre boundary and the landward villages. A door-to-door interview methodology was used, based on addresses in the South Ayrshire Edited Electoral Register. A broad spread of ages and genders was achieved in these interviews and results were weighted further to ensure that the age and gender profile was broadly reflective of the South Ayrshire average. This weighting process did not, however, have any material impact on the overall findings.

1.11 This report provides a summary of key results in graphical form with associated commentary.

1.12 Detailed appendices are included under separate cover. These include the survey questionnaire (Appendix 1), detailed data tables (Appendix 2) and a full listing of "other" responses and responses to open-ended questions (Appendix 3).

2.0 AYR CONCLUSIONS: SHOPPER AND RESIDENT

Shoppers and residents are attracted by the shops in Ayr – both food and non-food - and also the cafes/restaurants. Residents are making frequent use of the services – financial/professional, health and retail. As well as for purchases, the shops and services are driving foot-fall to the town centre for browsing/window shopping.

The cafes/restaurants provide an appealing presence in the town centre and the overall convenience of the location for shoppers, residents and visitors was the key reason to visit. The town centre was rated as good overall for positive feel and safe/secure environment and also for access via public transport.

The quality and variety of the shops were a contributing factor for reason to visit, however the overall shopping offering provides the main opportunity to improve Ayr town centre – endorsed by both shoppers and residents. In particular, less empty shops and smaller/specialised shops were suggested. Additionally, the balance of shops could be considered for improvement with less charity shops, more small/independent shops and more large/chain stores.

Provision of public toilets is also an area to consider for improvement and, for residents, improved parking – the price, time restraints and overall availability of parking.

Ayr town centre was the main location for use of shops, services and cafes/restaurants, but residents in particular use a wide range of support locations i.e. Ayr Heathfield for food shopping, Prestwick town centre for professional services and for cafes/restaurants and Glasgow city centre and Silverburn for non-food shopping.

Around half of residents visit Ayr town centre in the evening and most of the features were rated positively, especially the provision of good eating and drinking venues. There are opportunities, however, to improve the variety of things to do in the evening and also the availability of car parking.

3.0 OVERALL SUMMARY: AYR SHOPPER AND RESIDENT

Profile of shoppers and residents

71% of shoppers were female, which is expected in shopper surveys of this type, and 53% of residents were female, which is in-line with demographic profile of South Ayrshire residents. Respondents were from a range of age groups, with 27% of shoppers and 44% of residents aged 55+, showing a younger shopper profile.

The occupational status of head of household in both surveys was most likely to be working. The majority of the shoppers either lived locally or worked in Ayr town centre. However, 38% were visitors to the area.

Overall usage

The **main** purposes for visiting Ayr town centre were the shops - both food and non-food - and other reasons included cafes/restaurants. Residents are more likely to be using a wider range of outlets including financial/professional services and shoppers more likely to be browsing / window shopping. The frequency of food shopping and browsing is supporting usage of Ayr town centre as is the non-food shopping and financial/professional services.

Over 80% of the survey sample use Ayr town centre about the same frequency as a year ago. However, 11% of shoppers and 14% of residents use the town centre less often. Reasons for this are partly personal circumstances and partly issues related to the shops. Residents are more likely than shoppers to use a car to travel to the town centre (61% vs. 54%), reflecting a need to consider provision of satisfactory car parking.

Shoppers are likely to spend a range of times in the town centre but 72% of residents normally spend under two hours.

Purchase behaviour

The main purchase or service types made were different: shoppers were more likely to buy from non-food shops and in bars/cafes/restaurants and residents in business/financial services and food shops. The average total spent by shoppers on the occasion of their visit was £51.64 and the average total for residents on their most recent visit was £62.93.

The key reason for using Ayr town centre shops/services was the convenience of the location as the closest main shopping area; this was the case for both shoppers and residents. Other reasons for usage included the variety and quality of the shops/services – in particular for the residents.

Attitudes and factors that would encourage usage

Ayr town centre was rated as **very good/good** for cafes/restaurants, financial/professional services and access via public transport. It was rated as **good** for a positive feel, safe/secure environment, access via public transport and for library/public hall/Council services.

Both shoppers and residents rated the town centre as **poor** for traffic congestion and traffic system. Residents rated as poor features related to car parking; in particular, the price of parking and time restrictions.

The most popular changes to encourage increased usage of the town centre were the same for both survey samples: improved shopping offering. Specifically, less empty shops, more specialised/smaller shops, more large/chain stores and less charity shops. A proportion of residents also felt improved parking would encourage further usage of the town centre.

Usage of different locations for shopping/services

The main location used by residents and shoppers for shops, services and for cafes/restaurants was Ayr town centre, although a proportion used Ayr Heathfield for food shopping. Other locations for non-food shopping were further afield in Glasgow City, Silverburn or Braehead. Prestwick town was a support location for residents for the use of financial services and cafes/restaurants.

Closeness is a key reason for usage as a main location for shops and services; also quality and variety of shops/services.

Evening usage of town centre

24% of shoppers and 50% of residents visit Ayr town centre in the evening. Amongst those that do visit the town centre in the evening, residents are more likely than shoppers to visit cafes/restaurants in the evening (76% vs. 50%).

Most features of the town centre in the evening were rated positively, especially the provision of good cafés/restaurants and good bars/pubs/nightclubs. Also rated highly were good street lighting, safe/secure environment, positive feel, access via public transport and attractive/well-maintained environment. However, over half of residents that used the town centre in the evening rated variety of things to do in evening as poor (54%) and almost half rated available car parking as poor (47%).

4.0 AYR SHOPPER SUMMARY

Shopper profile

There was a female skew to the shopper profile, with 71% of respondents being female and 29% male, which is usual for shopping surveys of this type. Shoppers were from a range of age groups, with 27% aged 55+ and 33% aged 16-34. The occupational status of the head of household was mainly working (67%).

The majority of shoppers lived locally or worked in the town centre. However 38% were visitors to the area. Therefore, not all shoppers and service users surveyed are necessarily local residents or workers.

Overall usage

The **main** purpose for visiting the town centre was for non-food shopping (23%) or food shopping (16%) and **other** reasons most commonly included browsing/window shopping (38%) and use of a café/restaurant (27%). Use of professional services was relatively low i.e. financial/professional services (14%). Food shopping and browsing were the more frequent purposes for visiting, with around one-third of shoppers visiting at least three times a week for this purpose. Financial/professional services were used at least once a week by 23%.

Frequency of usage of the town centre has been fairly stable in the past year (81% saying that their usage has not changed), with 11% using less often – mainly due to personal circumstances. The majority of shoppers (54%) used a car to travel to the town centre and a total of 29% used public transport. There was a range of intended length of time intended to stay in the centre - 43% under 2 hours, 37% from 3-4 hours and 20% longer.

Purchase behaviour

The main purchase made or service used (or intended) was non-food shopping (49%) where an average of £18.86 was spent; 46% purchased in bar/cafes/restaurants with an average spend of £10.68; 25% purchase from food shops with an average spend of £12.68. The total average spend in Ayr town centre on the occasion of the visit was £51.64.

The key **main** reason for shopping in Ayr town centre was the convenience of it being the closest main shopping area – spontaneous mention of this was 40% and prompted was 53%. *"Has most of the shops I need very handy", "Close for the supermarket", "Work and live in the centre – it has all I need"*. Quality and variety of shops (27% and 32% respectively) were the most common **other** prompted reasons to use Ayr town centre.

Attitudes and factors that would encourage usage

Ayr town centre was rated as **very good/good** for: cafes/restaurants (27%), a safe/secure environment (24%) and access by public transport (21%). Other features rated highest as **good** were: financial/professional services (59%), positive feel (56%) and maintenance of pavements (51%). Some features were quite commonly rated as **poor/very poor,** albeit still by only a minority of respondents: provision of public toilets (24%), the traffic system (19%), and traffic congestion (16%).

The most popular changes to shops/services which would encourage increased use of the town centre were: less empty shops (45%), more large/chain stores (37%) and more small/specialised shops (32%). When asked about the balance of types of outlets, 54% felt there were too few large/chain stores, 33% too few small/independent shops, 54% too many charity shops 44% too many betting shops.

The key spontaneous improvement to the shopping experience was an improvement to shops/services available – cited by 69%: *"Bigger brand names like GAP, Zara- that sort of shop", "Get some big named shops back into the High Street", " Better choice – there's too much sameness here", "More small local run shops", "Sad to see empty shops".*

Usage of different locations for shopping/services

The main location used for different types of shopping or services was Ayr town centre, particularly for use of financial services, retail services and cafes/restaurants. 20% mainly use Ayr Heathfield for food shopping. A proportion used a variety of further afield locations i.e. Dumfries, Stranraer, Carlisle and Belfast/Belfast Victoria Square. This perhaps reflects the home location of visitors to the area as well as residents travelling to other shopping areas.

Other locations commonly used for non-food shopping included Glasgow City (32%) or Silverburn (29%). Closeness for shopping or service use was the key reason for usage as a main location and a good variety and quality of shops was key for non-food shopping.

Evening usage of town centre

24% of shoppers visited the town centre in the evening and of the 76% who did not, over half (55%) preferred to go elsewhere. The key venues used in evening are pub/bar/club (76%) and café/restaurant (50%) and 37% visit the town centre for each of takeaway and cinema/theatre.

Features of the town centre in the evening that were most commonly rated as **very good/good** were: good cafés/restaurants (80%), street lighting (76%), good bars/pubs/nightclubs (67%) and safe/secure environment (60%). Those features most commonly rated as **poor/very poor** were: variety of things to do (30%), access via public transport (25%) and available car parking (17%).

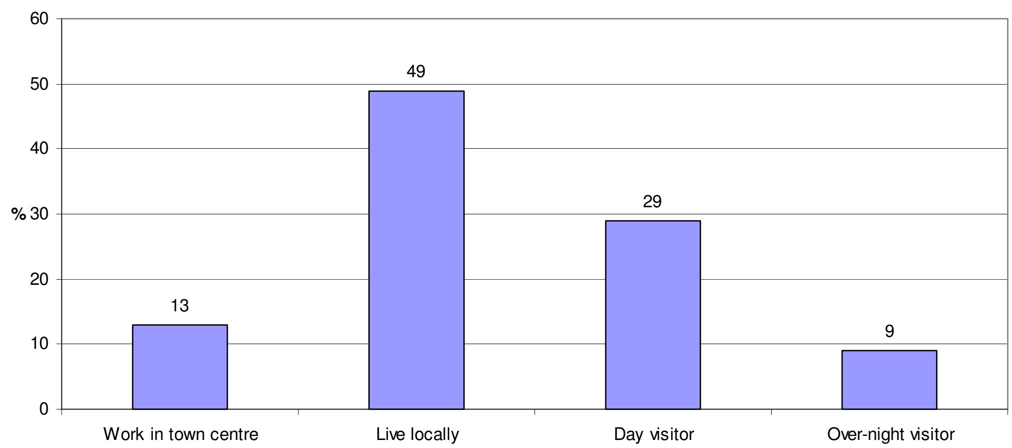
5.0 AYR SHOPPER KEY FINDINGS: TOWN CENTRE

Shopper profile

5.1 Shoppers were shown a list of types of visitor to the town centre and ask to select one which best described themselves. 49% lived locally, 13% worked in the town centre and a total of 38% were visitors to the area. Further detailed analysis of the data shows that 37% of visitors live outside South Ayrshire, including 2% from outside Scotland. Therefore, not all shoppers and service users surveyed in the town centre are necessarily local residents or workers.

Figure 5.1 Type of visitor to town centre

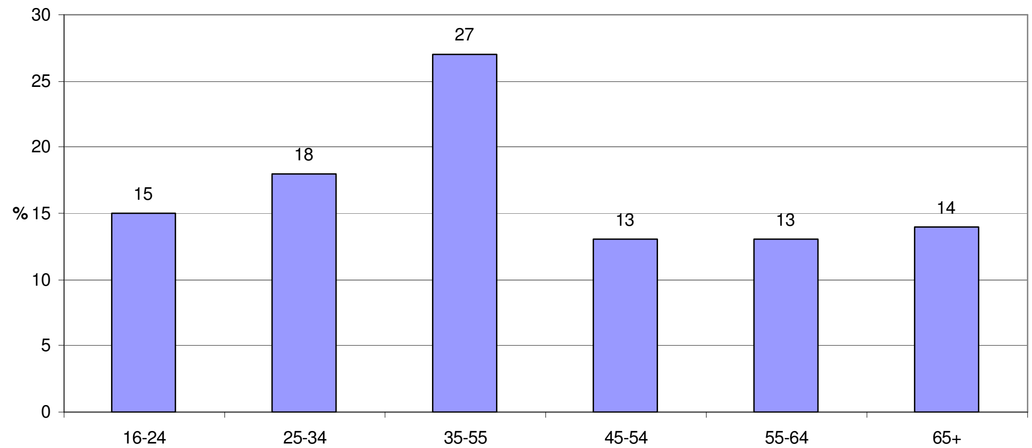
Which type of visitor to this town centre best describes you today? Base 263



5.2 There was a female skew to the shopper profile, with 71% female and 29% male; a female skew is typical in shopper surveys. The age group profile of visitors is shown in Figure 5.2, 33% of shoppers were aged 16-34 and 27% were aged 55+.

Figure 5.2 Age of visitor to town centre

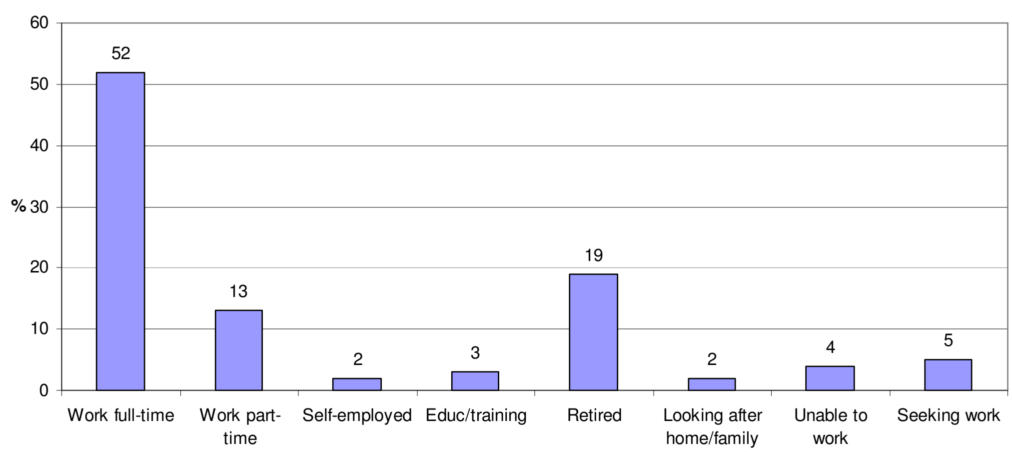
Into which of these age bands do you fall? Base 263



5.3 Analysis of the occupational status of the head of household for shoppers shows that the majority were working: 52% were working full time and a further 13% part-time. 19% of the household heads were retired.

Figure 5.3 Occupational status of head of household

Which best describes the current occupational status of your head of household? Base 263

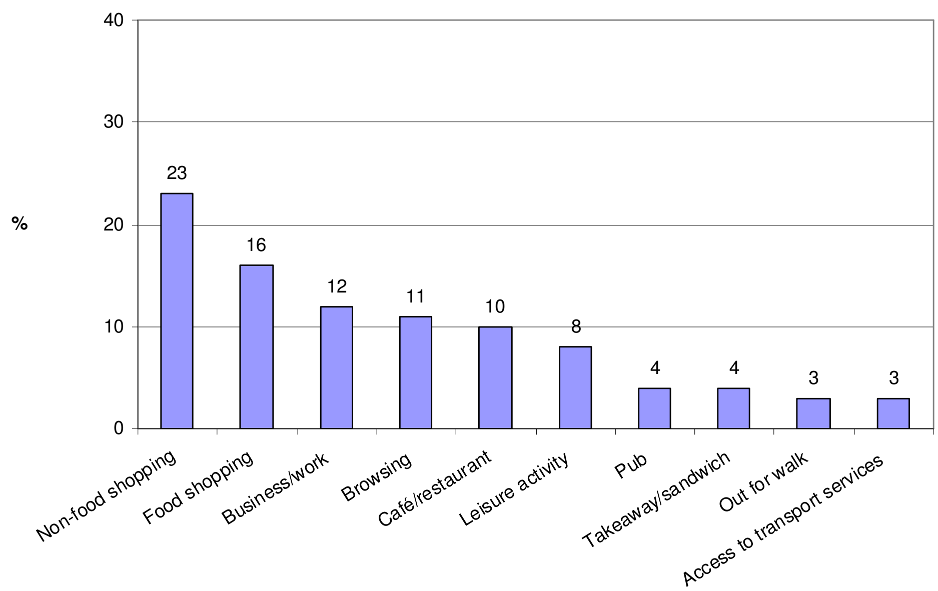


Overall usage

5.4 Shoppers were shown a list of purposes for visiting the town centre and asked to select **one main** purpose for their current visit. The most common responses are shown below. There was a wide range of answers: shopping was highest, either non-food shopping (23%) or food shopping (16%). A total of 18% respondents were mainly visiting to have food and drink: café/restaurant (10%), pub (4%) or takeaway/sandwich (4%).

Figure 5.4 Main purpose for visit

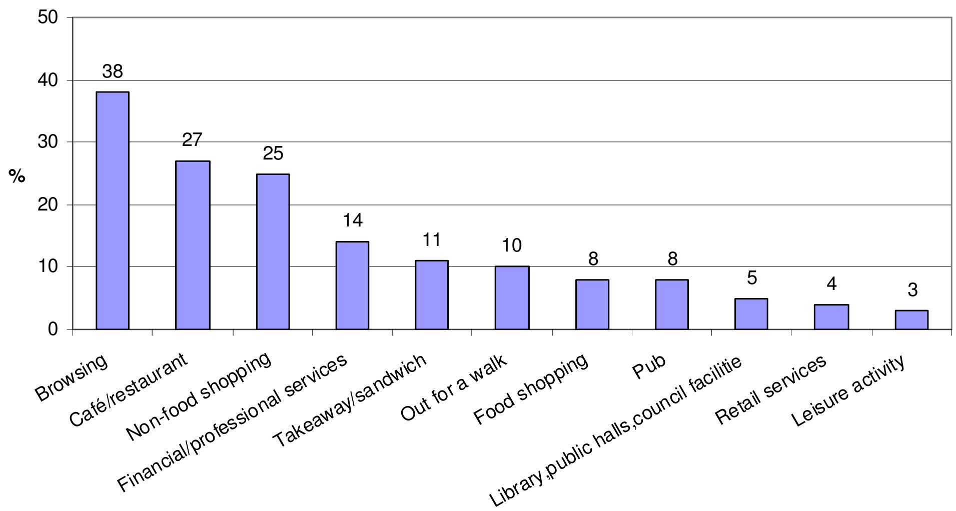
What is your MAIN reason for visiting this town centre today? Base 263



5.5 Shoppers were then asked to select any **other purposes** for their current visit and the most common of these are shown below. This generated a broader set of responses, particularly for browsing/window shopping (38%), café/restaurants (27%) and non-food shopping (25%).

Figure 5.5 Other purposes for visit

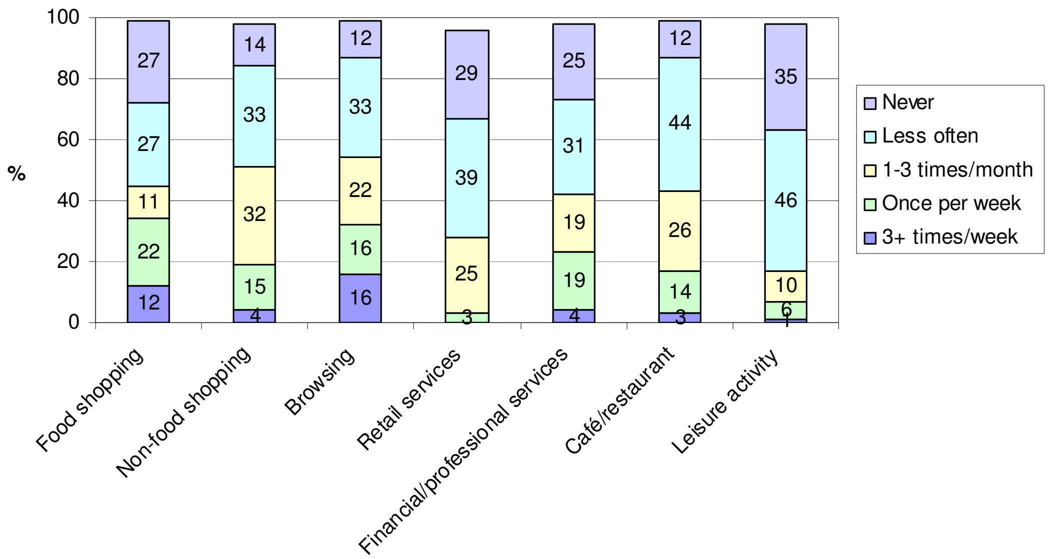
What OTHER reasons do you have for visiting this town centre today? Base 263



5.6 A list of types of shopping/services was shown and shoppers asked how often, if at all, they visited the town centre for each. Shopping for food and browsing were the most frequent purposes for visiting - 34% and 32% respectively at least 3 times per week. Financial services were used at least once a week by 23%[1]

Figure 5.6 Frequency of usage[2]

How often do you visit this town centre during the day? Base 263



[1] Throughout the report, the numbers in certain graphs and tables may not sum to 100%. This may be due to "not answered responses", to rounding of numbers or to the existence of multiple response questions (in which case, results may sum to more than 100%).

[2] There may be occasional graphs where certain individual numbers cannot be identified because these are low numbers. In these circumstances, the reader is directed to the appendices that accompany the report for full details.

5.7 Figure 5.7 shows how the frequency of shopper visits to town centre has changed over the last year. The majority (81%) are using the centre about the same frequency as last year, reflecting stability in usage. The main reason for changed usage was personal circumstances i.e. *"More time and spare money", "On maternity leave so come here more often".* Also some issues related to shops/services i.e*. Feel the town is going down especially the bottom end", "More choice at retail parks and free parking there"*. A full listing of comments can be found in the appendices.

Table 5.7 Change in frequency of visits

How has the frequency of your visiting to this town centre changed over the last year?

Base: 263	
	%
More often	8
About the same	81
Less often	11

5.8 Table 5.8 shows that 54% of shoppers used a car to travel to the town centre on this occasion; a total of 29% used public transport (bus/train).

Table 5.8 Method of transport to travel to town centre

How did you travel to this town centre today?

Base: 263	
	%
Car	54
Bus	26
Walk	13
Train	3
Cycle	2

5.9 Table 5.9 shows that 16% were planning to spend less than 1 hour in the town centre, 27% between 1-2 hours and (37%) between 3-4 hours. NB: for those who work in the centre, this question referred to the period spent on shopping or using a service on this occasion.

Figure 5.9 Length of time shopping/using a service

How long do you intend to spend in this town centre today?

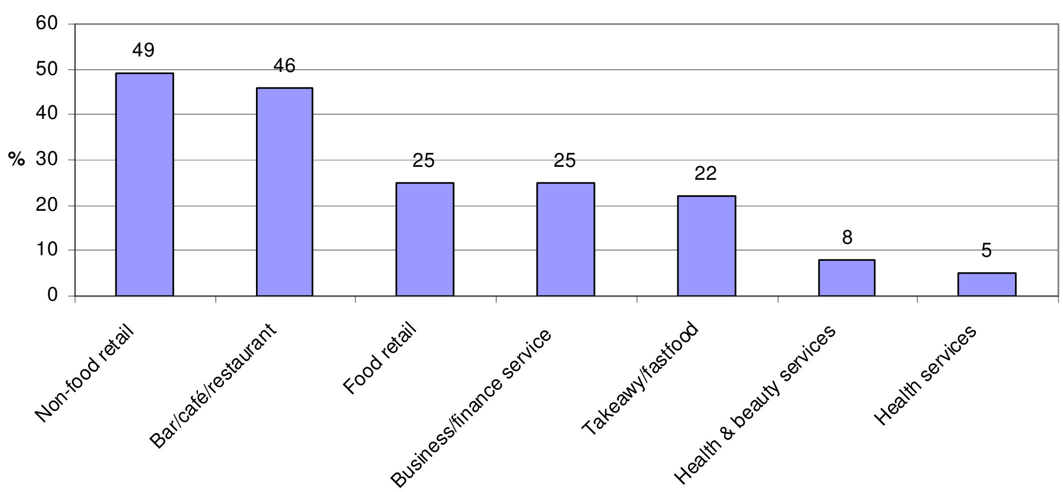
Base: 263	
	%
Less than 1 hour	16
1-2 hours	27
3-4 hours	37
5-6 hours	10
All day	10

Purchase behaviour

5.10 The types of purchases made or services used (or intended to) are shown in Figure 5.10. The main purchases were for non-food shop (49%), bar/café/restaurant (46%), food shop (25%) and business/financial services (25%). Use of health/beauty services and health services were relatively low.

Figure 5.10 Types of purchases/ services used or intended

What have you bought/expect to buy and/or which services have you used/expect to use today? Base 263



5.11 For each of the types of shopping or services, shoppers were asked their spend/likely spend on this occasion, using a range of spend categories. Taking the mid-point values from the categories above (and assuming 'more than £100' as £100), the average spend has been calculated, based on those who gave an answer. Non-food (£18.86) and food (£12.68) shopping had the highest average spend. The average spend in bar/café/restaurant was £10.68. The total average spend in the town centre on this occasion was £51.64.

Table 5.11 Average spend on last occasion

Business and Financial Services	£3.76
Bar/Cafe/Restaurant	£10.68
Retail (non-food)	£18.86
Retail (food)	£12.68
Takeaway and Fast Food	£2.02
Health Services (e.g. dentist, opticians)	£0.46
Health and Beauty Services (e.g. hairdresser, nail salon, beauty therapy)	£3.20
Total	**£51.64**

Reasons for usage of town centre

5.12 Table 5.12 shows the key reasons shoppers gave for using this town centre rather than somewhere else on this occasion. This was asked as an open-ended question and respondent verbatim answers were coded into categories. A selection of verbatim comments is shown in Table 5.12.1 and full listing of comments can be found in the appendices. The key category was that of convenience (40%) followed by general positive comments on the shops/services (14%) and holiday/day trip (13%).

Table 5.12 Reasons for using town centre

Why are you using the shops/services in this town centre today as opposed to using somewhere else?

Base: 210	
	%
Convenience generally	40
General positive aspects	14
Holiday/day trip	13
Positive to shops/service	10
Closeness to work	10
Specific shops/service	10
Passing through	5
Friends/family	4

Table 5.12.1 Example of verbatim reasons for using town centre

Reasons to use	Town Centre
Convenience generally	*"Couldn't be better, I work and live in the centre. Can get what I want with the shops here"* *"Easy to get to and get around for me"* *"Extremely handy for me, has most of the shops I need. Has some good quality shops, but not as much as years ago"* *"Handy for supermarket"* *"Enjoy lunch here monthly"* *"I can walk here. I like to walk"*
General positive aspects	*"I love coming to Ayr town centre"* *"It's a nice day out to wander round about here"* *"Nice town"* *"Nice variety of shops"* *"Like certain restaurants and pubs"* *"Work and live in the centre. Has all I need for immediate use. Shops just about meet my needs".*
Holiday/day trip	*"When we get off the Ferry, Ayr is the first place to go"* *"On a day out and a walk by the sea"* *"Nearest to Craig Tara"* *"Near caravan park where we are staying*

5.13 Shoppers were shown a list of reasons for visiting the town centre and asked to select **one main** reason for their current visit and then **other reasons**. Proximity to this main shopping area was the highest main reason to visit (53%). Other reasons concerned the outlets: variety of shops/services (32%), quality of shops/services (27%) and quality of café/restaurants (24%). The main answer for 'other' was "*Passing through/day trip/visit".*

Figure 5.13 Main and other reasons for visit

What is your MAIN reason for using the shops or services in this town centre today?

What OTHER reasons do you have?

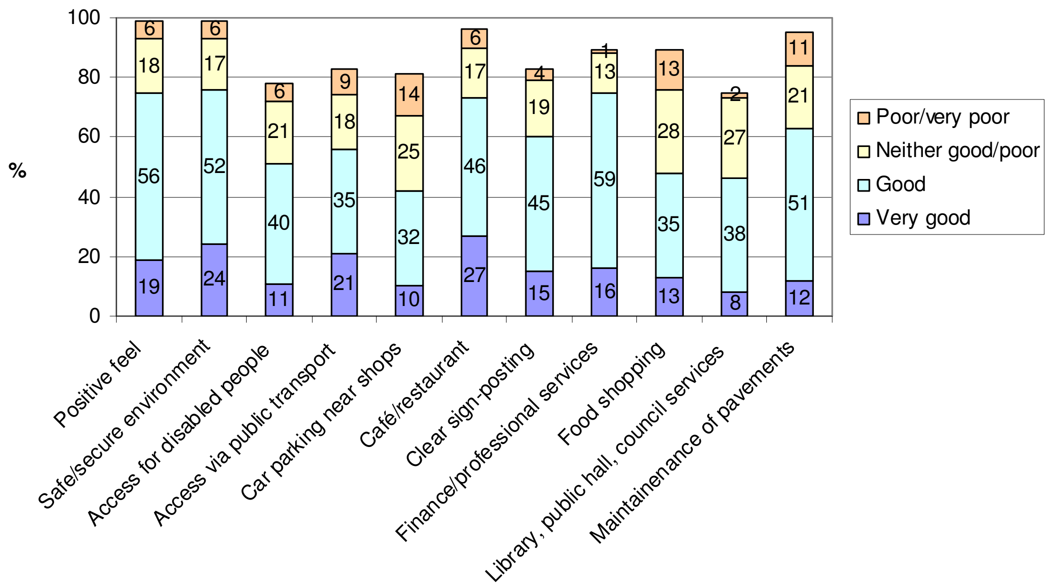
Base: 100	**Main reason**	**Other reasons**
	%	%
Closest main shopping area	**53**	8
Quality of café/restaurants	6	**24**
Quality of shops/services	2	**27**
Variety of shops/services	9	**32**
Specific shop/service	2	6
Attractive/well-maintained centre	4	16
Good car parking	3	12
Positive feel to town centre	2	18
Good public transport	1	11
Other answers	14	3

Attitudes and factors that would encourage usage

5.14 A list of features about the town centre was shown and shoppers asked to rate each one as either: very good, good, neither good nor poor, poor or very poor. Results are shown in Tables 5.14/15. Features rated highest for **very good** included: cafes/restaurants (27%), a safe/secure environment (24%) and access via public transport (21%). Other features which were commonly rated as **good** included: financial/professional services (59%), positive feel (56%) and maintenance of pavements (51%).

Figure 5.14 Attitudes towards town centre

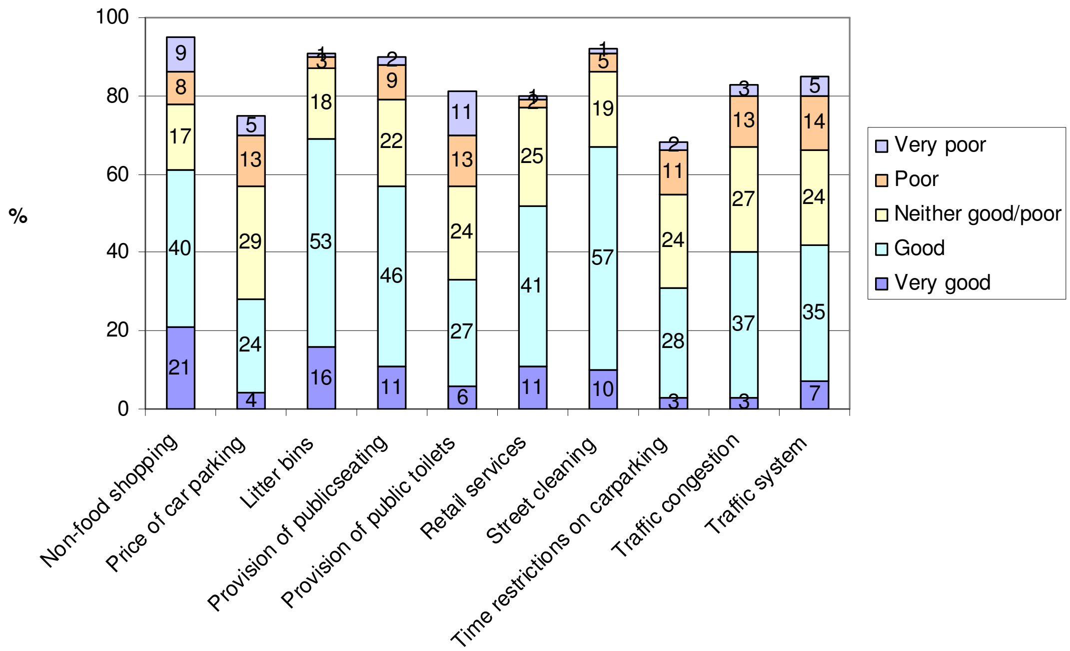
How do you rate this town centre with regard to the following? Base 263



5.15 Features rated highest as **poor/very poor** included: provision of public toilets (24%), traffic system (19%), price of car parking (18%), non-food shopping (17%) and traffic congestion (16%), although many rated these features positively.

Figure 5.15 Attitudes towards town centre

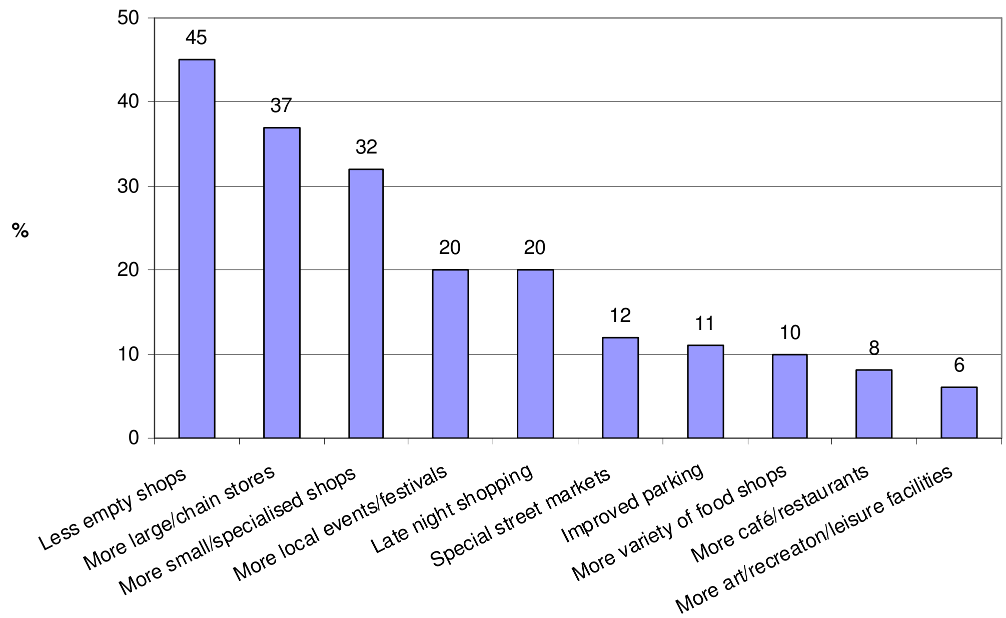
How do you rate this town centre with regard to the following? Base 263



5.16 Table 5.16 shows the changes to town centre which would encourage shoppers to use the town centre more often; shoppers were asked to provide up to three changes from a list and the most common are detailed below. The most popular changes suggested were for less empty shops (45%), more large/chain stores (37%) and more small/specialised shops (32%).

Figure 5.16 Changes to attract more usage of town centre

Which, if any, of these changes to shops/services would encourage you to use this town centre more? Base 263

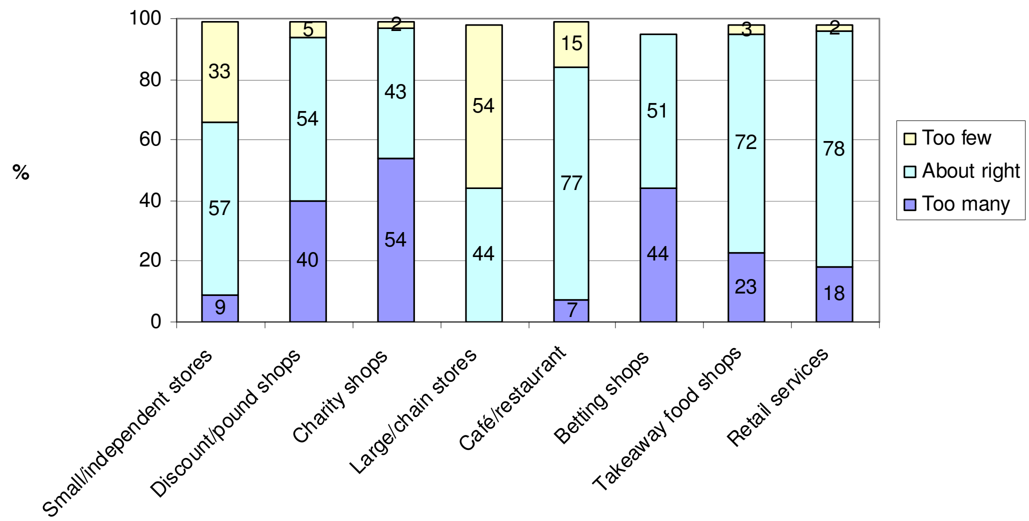


5.17 Shoppers were shown a list of different types of outlets in the town centre and for each they were asked if there were: too many, about right or too few. 54% felt there were too few large/chain stores and 33% too few small/independent stores. 54% felt there were too many charity shops and 44% too many betting shops.

Figure 5.17 Attitudes towards types of outlets

What do you think about the number of these types of outlets in this town centre?

Base 263



5.18 Table 5.18 shows the spontaneous categories which shoppers felt would improve their shopping experience in the town centre. This was asked as an open-ended question and respondent verbatim answers were coded into categories. The key category was that of improvements to shops/services (69%). A selection of verbatim comments is shown in Table 5.18.1 and full listing of comments can be found in the appendices.

Table 5.18 Improvements to shopping experience

What do you think would improve your shopping experience in this town centre?

Base: 154	
	%
Improvements to shops/services	69
Better/cheaper parking	12
Fill empty shops	10
Less traffic/traffic improvements	3

Table 5.18.1 Example of verbatim reasons for improving town centre

Reasons to use	**Town Centre**
Improvements to shops/services	*"A choice of shops. Too much sameness here"* *"A general quality of shopping in all aspects"* *"Bigger brand names like GAP, Zara- that sort of shop"* *"Get some big named shops back into the high street. Allow cafes and restaurants to have chairs and tables outside"* *"High Street names and brands"* *"More large shops like Frasers"* *"More exciting places. Less hairdressers, bookies and charity shops"* *"Young people's shops"* *"Less charity more real shops"* *More small local run shops"*
Better/cheaper parking	*"Reduce the price of parking"* *"Nothing other than the price of the parking"* *"Cheaper parking"*
Fill empty shops	*"Sad to see empty shops"* *"Stop closing the shops down, it's spoiling the look of the town"* *"Too many shops shutting down."*

Usage of different locations for shopping/services

5.19 Shoppers were shown a list of locations for different types of shopping and services and asked to select their **one main** location for each; the key areas are shown here. Ayr Town Centre was the main location used overall, with a smaller proportion (20%) using Ayr, Heathfield for food shopping. 'Other' answers included Dumfries, Stranraer, Carlisle, Edinburgh and Belfast/Belfast Victoria Square, perhaps reflecting home location of visitors to the area or residents travelling to other shopping areas.

Table 5.19 Main location for shopping and service types

Which of these shopping areas is your MAIN location for each of these types of shopping or services? Base 263

	Food	Non-food	Financial	Retail services	Café/ restaurant
	%	%	%	%	%
Ayr, Heathfield	20	4	1	1	1
Ayr, Town Centre	**31**	**38**	**50**	**45**	**41**
East Kilbride Town Centre	3	6	3	4	3
Irvine Rivergate	2				
Kilmarnock Town Centre	4	4	3	3	4
Silverburn	2	7	1	2	3
Glasgow City	7	13	9	11	11
Other	23	18	22	22	19

5.20 Shoppers were then asked to select any **other locations** for shopping and services. Ayr remained a key location, although use of retail parks/city locations was higher for non-food purchase – Silverburn (29%) and Glasgow City (32%).

Table 5.20 Other locations used for shopping and services

Which OTHER shopping areas do you use for each of these types of shopping or services? Base 263

	Food	Non-food	Financial	Retail services	Café/ restaurant
	%	%	%	%	%
Ayr, Heathfield	19	8	3	2	3
Ayr, Town Centre	19	19	26	21	22
East Kilbride Town Centre	6	17	6	6	8
Irvine Rivergate	6	8	5	0	4
Kilmarnock Town Centre	5	5	3	2	7
Prestwick Town Centre	6	4	4	2	11
Troon Town Centre	3	5	2	4	6
Braehead	8	17	4	6	11
Silverburn	17	29	9	10	21
Glasgow City	13	32	15	16	27
Other	15	12	15	16	14

5.21 Shoppers were given a list of reasons why they might mainly use a shopping or service location and asked to select as many as applied; the most common responses are shown below. For all types of shopping and services, the closeness of the location was the main factor for use. For non-food shopping, a good variety of shops was also an important factor (31%).

Table 5.21 Reasons to use main location for shopping and services

What are your reasons for using this location for this type of shopping/services? Base: 263

	Food	Non-food	Financial services	Retail services	Café/ restaurant
	%	%	%	%	%
Closest main shopping area	71	63	73	68	65
Variety of shops and services	14	31	10	13	12
Quality of shops and services	14	25	10	15	14
Good car parking	12	10	5	3	4
Good public transport	3	5	3	3	3
Attractive/well-maintained environment	3	3	2	2	3

Evening usage of town centre

5.22 24% visited the town centre in the evening and 76% did not. Those who did not most commonly gave the following reasons: prefer to go elsewhere (55%) no need/ don't go out (26%) and don't live here (11%).

5.23 Table 5.23 shows the purposes of visiting the town centre in the evening. The most common purposes were to visit to a pub/bar/nightclub (76%) and café/restaurant (50%). Leisure and social reasons were also common i.e. cinema/theatre (37%) and sports/gym/health and fitness (18%).

Table 5.23 Purpose of visits to town centre in evening

For what purposes do you visit the town centre in the evening?

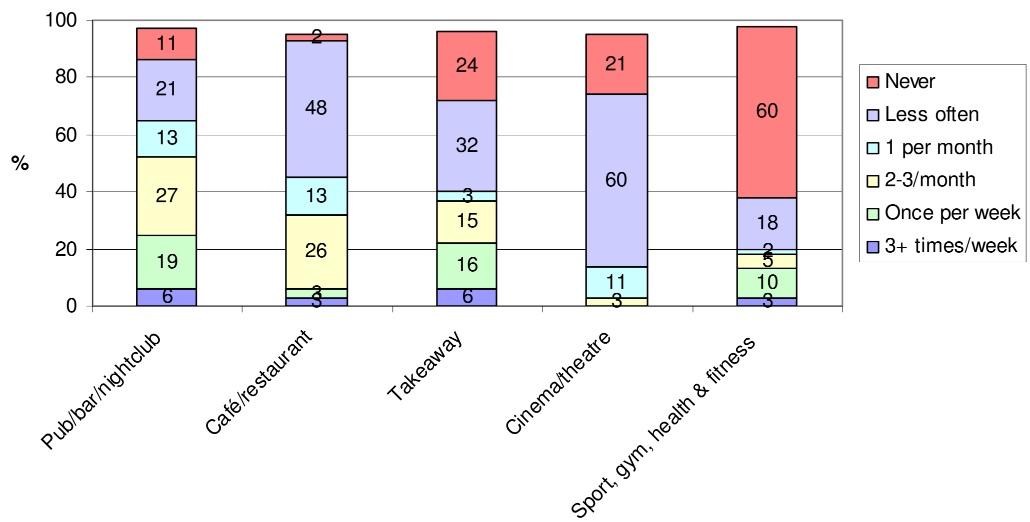
Base: shoppers visiting in evening	**62**
	%
Pub/bar/nightclub	76
Café/restaurant	50
Takeaway	37
Cinema/ theatre	37
Sports, gym, health and fitness	18
Food shopping	6

5.24 Shoppers were asked how often they visited different types of venues in the evening and the results for the most common things are set out below. 25% visit a pub/bar/nightclub at least once a week and 22% use a takeaway at least once a week.

Figure 5.24 Frequency of using town centre in evening

How often do you go into this town centre in the evening for these things?

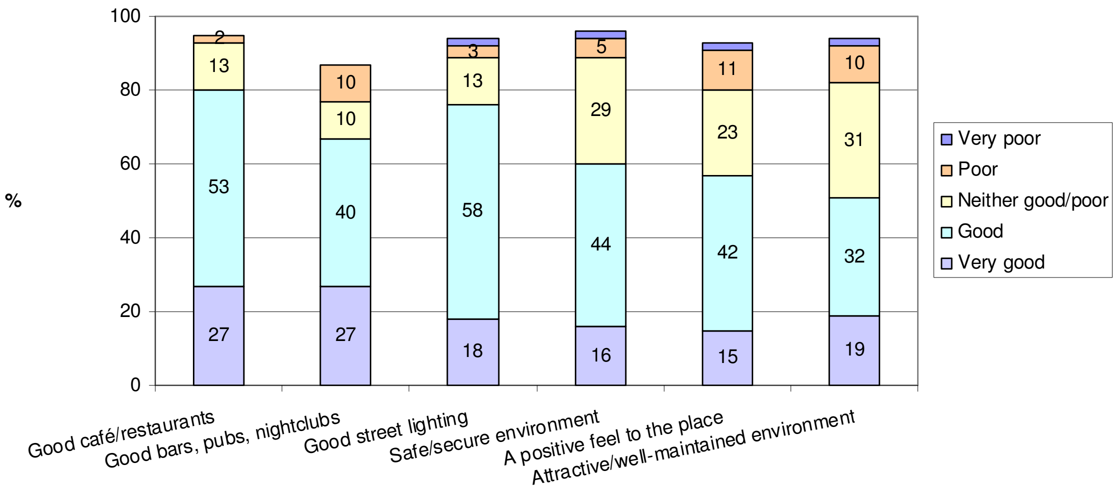
Base: 62 respondents



5.25 A list of attributes of the town centre in the evening was shown and shoppers were asked to rate each one as: very good, good, neither good nor poor, poor or very poor. Features which were rated most commonly as **very good/good** included: good cafés/restaurants (80%), good street lighting (76%), and good bar/pubs/nightclubs (67%).

Table 5.25 Attitudes towards town centre in evening

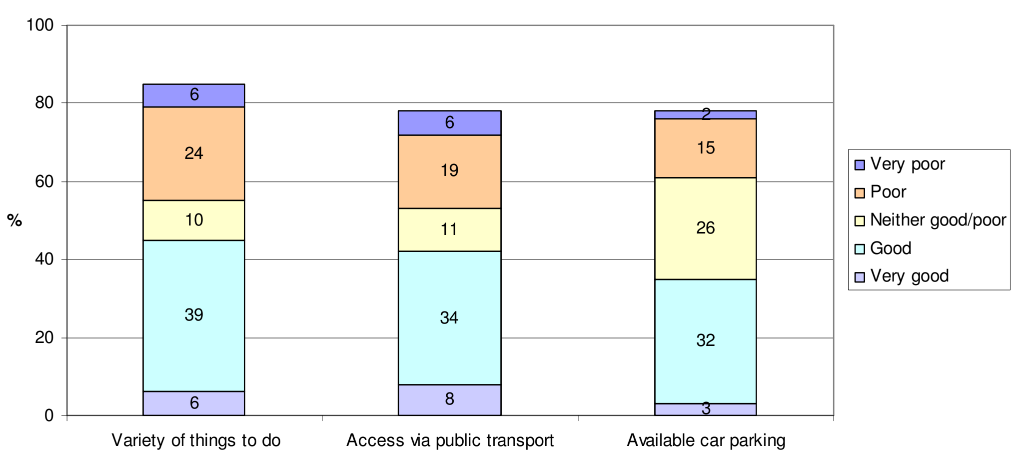
When you visit this town centre in the evening, how do you rate it with regard to these? Base: 62 respondents



5.26 Certain evening features were rated over 20% for being **poor/very poor**: variety of things to do (30%), access via public transport (25%) and available car parking (17%). However, around one-third of respondents rated these as good/very good.

Table 5.26 Attitudes towards town centre in evening

When you visit this town centre in the evening, how do you rate it with regard to these? Base: 62 respondents



6.0 AYR RESIDENT SUMMARY

Resident profile

53% of respondents were female and 47% were male; this is in-line with the demographic profile of South Ayrshire. Residents were from a range of age groups, with 44% aged 55+. The occupational status of the head of household was mainly working (53%) and 29% were retired.

Overall usage

The one **main** purpose for normally visiting Ayr town centre was for food shopping (64%). **Other** purposes most commonly cited included non-food shopping (71%) and use of services i.e. financial/professional (57%), retail (51%) and professional health (46%). 42% were using café/restaurants.

Residents are making regular visits to the town centre, especially for retail usage. The most frequent usage was for food shops: 28% at least 3 times a week. At least weekly usage was apparent for: food shopping (70%), financial/professional services (42%), non-food shopping (34%) and browsing/window shopping (30%).

Frequency of usage of the town centre has been fairly stable in the past year – 83% claiming no change; however, 14% visit less often due to changes in personal circumstances, issues related to shops and the state of the town centre: "P*oor state of the place – needs a good upgrade".* Over half (61%) of residents normally drive to the town, indicating a need for satisfactory car parking, and 72% spend under 2 hours in the town centre.

Purchase behaviour

The main purchase made or services used at residents' last visit to the town centre were business/financial services (56%), food shops (55%), bar/café/restaurants (46%) and non-food shops (45%); reflecting a range of shops/services being used in town centre. The total average spend in Ayr town centre on residents' most recent visit was £62.93, with the highest average spend being on food shopping (£22.37).

The key **main** reason for visiting residents visiting Ayr was the convenience of being the closest main shopping area (61% spontaneous and 82% prompted) *"Nearest to us and still has reasonable shops", "Can get to all the shops easily" "Has good shops that cover my needs".* **Other** prompted reasons included variety (58%) and quality (57%) of the shops/services.

Attitudes and factors that would increase usage

The services in Ayr that were most commonly rated as **very good** were: retail services (26%), financial/professional services (22%) and cafes/restaurants (23%). Other features which were rated positively included: non-food shopping, street cleaning, safe/secure environment and library/public hall/Council services. The feature which was rated most commonly as **very poor** was availability of public toilets (52%). Other features commonly rated as **poor** included elements of traffic and parking: traffic congestion (51%), traffic system (46%), price of car parking (41%) and time restrictions on car parking (38%)

The key spontaneous categories to improve shopper experience were: improved shops/services (59%), improvements to parking (27%) and fill empty shops (25%): *"Better all round variety and style of shops", "General make-over of town centre", "It's depressing and lacks atmosphere", "Lots of empty shops, lost its character by moving the shops from the High Street into Mall", "Parking is poor in the town centre", "Get rid of all the empty shops".*

The most popular prompted changes which would encourage increased use of the town centre were: more small/specialised shops (66%), more large/chain stores (51%), less empty shops (47%) and improved parking (37%). This is confirmed in residents' answers when asked about the balance of types of stores; 78% felt there were too few small/independent stores and 54% too few large/chain stores; 67% felt there were too many charity shops in the town centre.

Usage of different locations for shopping/services

The main location used for shops and particular for services was clearly Ayr town centre: specifically, it was the main location used for financial services (90%), retail services (84%) and cafés/restaurants (82%). Prestwick town centre provided a support location for services and cafés/restaurants and Silverburn, Glasgow City and Braehead were also used for non-food shopping. Closeness of a location for use of shops and services was the key reason for use; other common factors were variety of shops and retail services and quality of cafes/restaurants

Evening usage of town centre

50% of residents visited the town centre in the evening and, of these, 76% are visiting cafés/restaurants and 69% pubs/bars/nightclubs. Of the residents who did not visit the town centre in the evening, 39% stated they preferred to go elsewhere.

Most features of the town centre in the evening were rated positively. Those most commonly rated as **very good** were: cafés/restaurants (41%) and bars/pubs/nightclubs (31%). Features commonly rated as **good** included: safe/secure environment (46%) and positive feel (49%).

Features rated most commonly as **poor/very poor** were: variety of things to do (54%) and available car parking (47%).

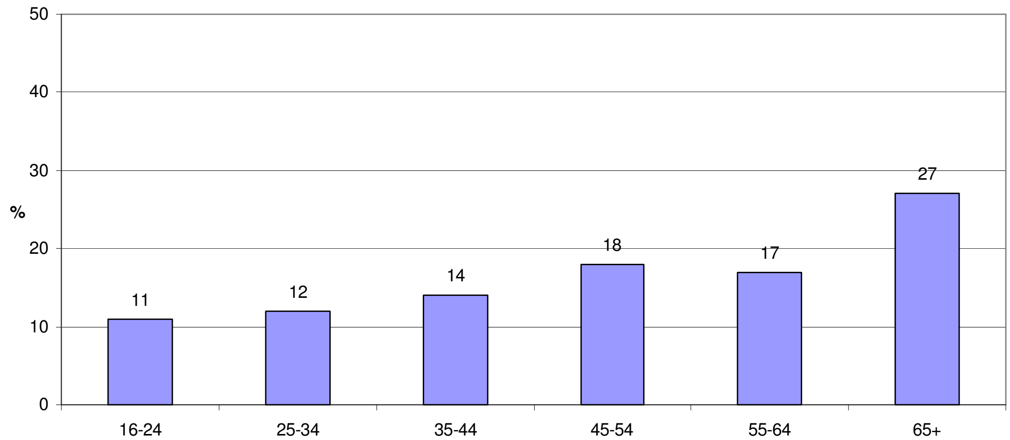
7.0 AYR RESIDENT KEY FINDINGS: TOWN CENTRE

Resident profile

7.1 53% of respondents were female and 47% were male; this is in-line with the demographic profile of South Ayrshire. The age group profile of residents is shown in Figure 7.1, 44% of residents in the survey were aged 55+.

Figure 7.1 Age of resident

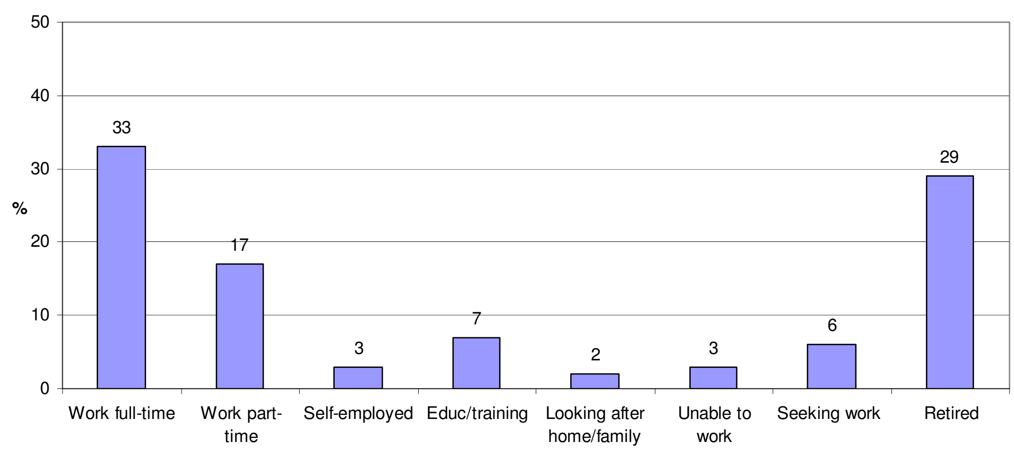
Into which of these age bands do you fall? Base 160



7.2 Analysis of the occupational status of the head of household for residents shows that 53% were working and 29% were retired.

Figure 7.2 Occupational status of head of household

Which best describes the current occupational status of your head of household? Base 160

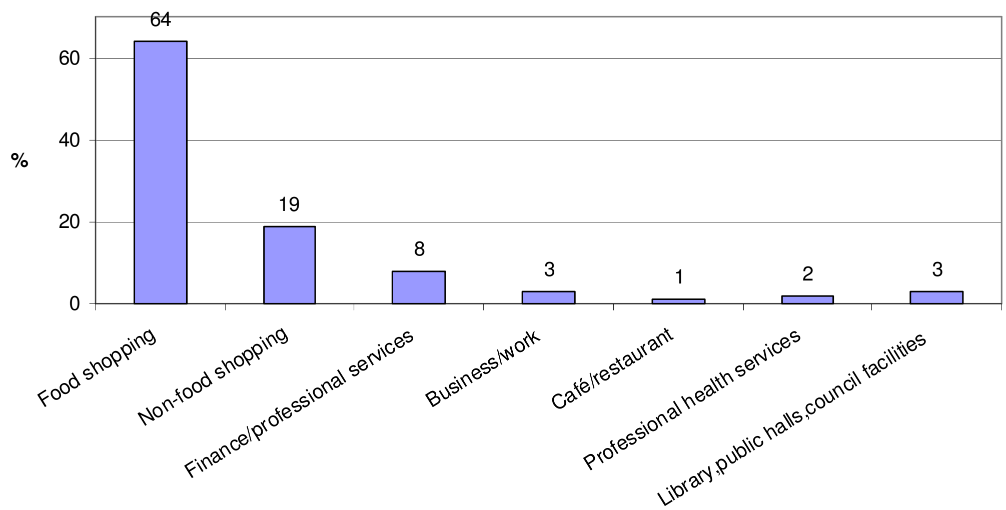


Overall usage

7.3 Residents were shown a list of purposes for visiting the town centre and asked to select **one main** purpose for their normal visit during the day. The most common responses are shown below. The key purpose was clearly for food shopping (64%).

Figure 7.3 Main purpose for normal visit

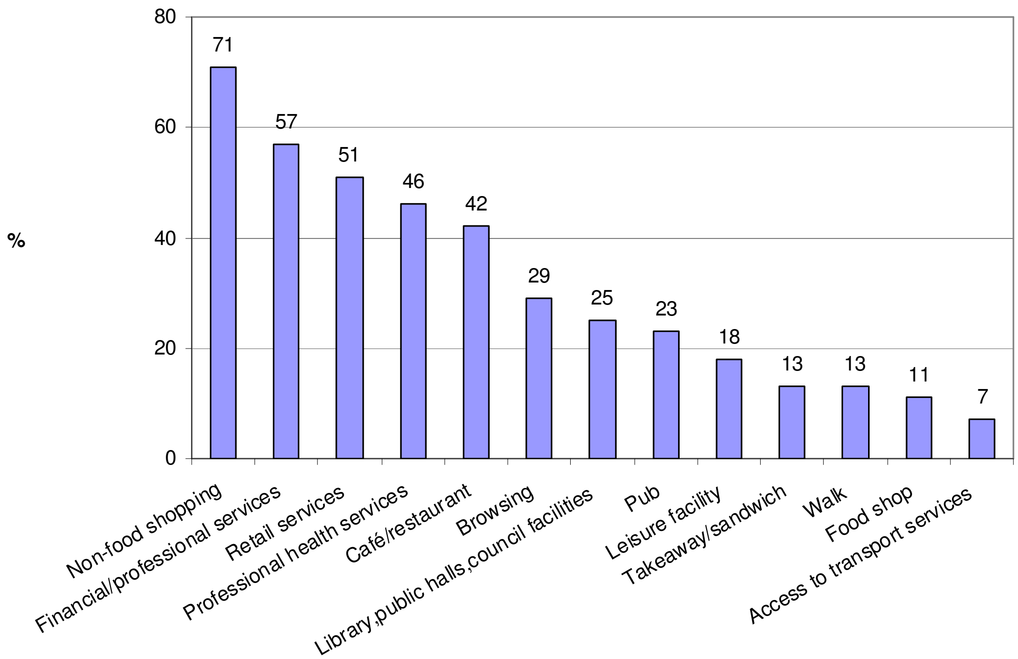
What is your MAIN reason for normally visiting this town centre? Base 160



7.4 Residents were then asked to select any **other purposes** for a normal visit and this generated a broader set of responses, in particular for use of services. The most common other purposes were: non-food shops (71%), financial services (57%), retail services (51%), professional health services (46%) and café/restaurants (42%).

Figure 7.4 Other purposes for normal visit

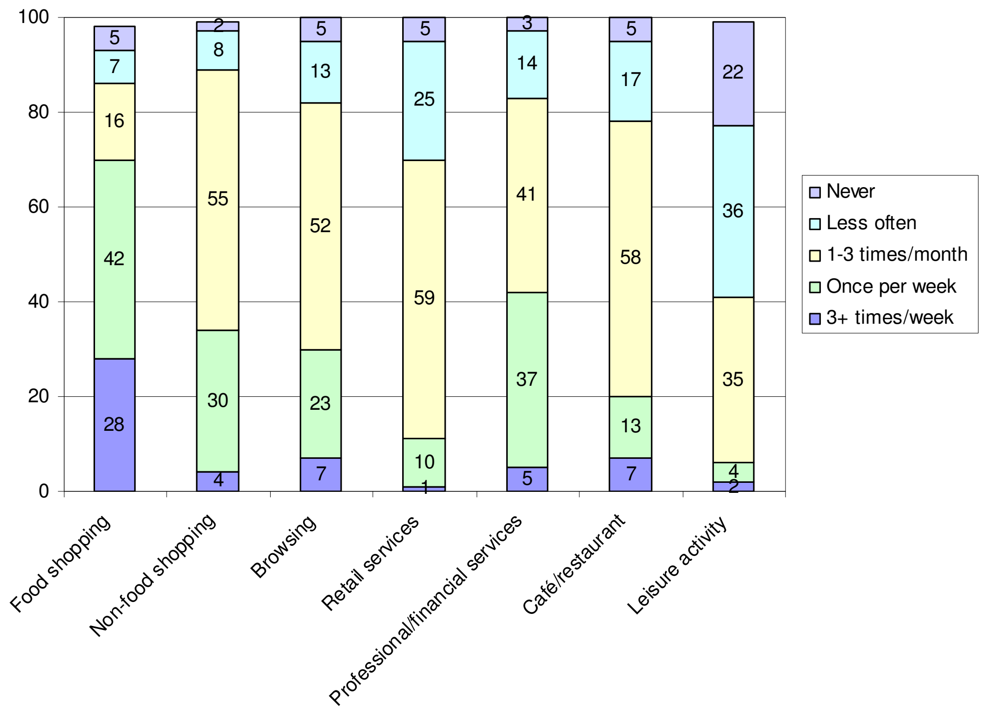
What OTHER reasons do you have for normally visiting this town centre? Base 160



7.5 A list of types of shopping and services was shown and residents were asked how often, if at all, they visited the town centre for each. The most frequent usage was for food shops: 28% at least 3 times a week. A least once a week usage was: food shops (70%), professional/financial services (42%), non-food shopping (34%) browsing/window shopping (30%).

Figure 7.5 Frequency of usage

How often do you normally visit this town centre during the day? Base 160



7.6 Figure 7.6 shows how frequency of resident visits to the town centre has changed over the last year. Usage is stable with 83% of respondents claiming no change; however, 14% visit the town centre less often than last year. The main reasons for using the town centre less often were changes in personal circumstances, issues related to shops and perception of the town centre being run down. Some specific comments for using less often: *"There are no shops and services that are as good as they used to be", "Lack of service quality shops, parking too expensive", "Poor state of the place - needs a good going over to upgrade it".* A full list of comments is contained in the appendices.

Table 7.6 Change in frequency of visits

How has the frequency of your visits to this town centre changed over the last year?

Base: 160	
	%
More often	2
About the same	83
Less often	14

7.7 61% of residents normally drive to the town centre.

Table 7.7 Method of transport to travel to town centre

How do you normally travel to the town centre?

Base: 160	
	%
Car	61
Walk	20
Bus	20
Cycle	2

7.8 The majority of residents (72%) generally spend less than 2 hours when visiting the town centre. NB: for those that work in the centre, this question referred to the period spent on shopping or using a service.

Figure 7.8 Length of time shopping/using a service

How long do you normally spend in the town centre?

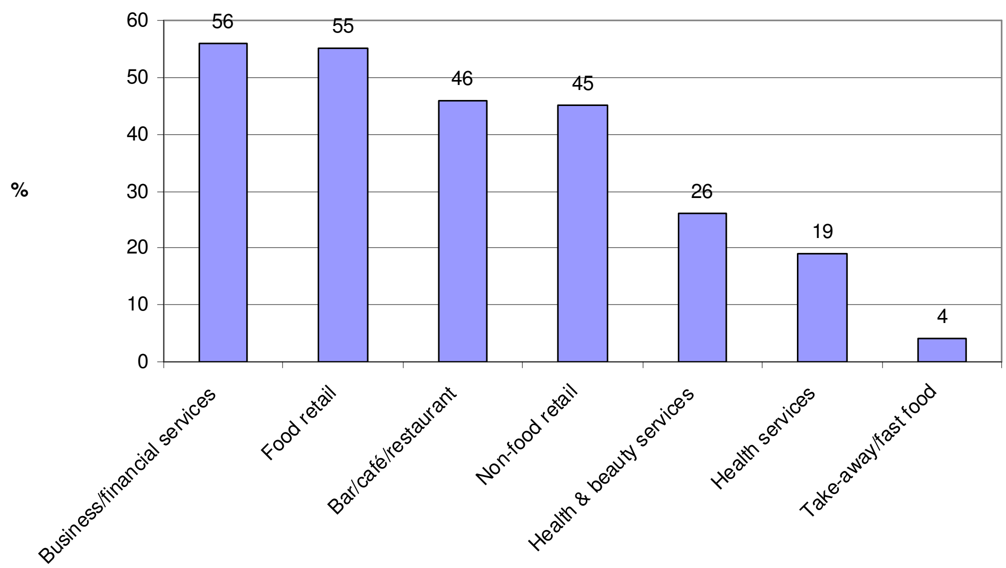
Base: 160	
	%
Less than 1 hour	11
1-2 hours	61
3-4 hours	28
5-6 hours	0
All day	3

Purchase behaviour

7.9 The types of shopping or services respondents used on their last visit to the town centre are shown in Figure 7.9. Most common was business/financial services (56%) and food shops (55%), followed by bar/café/restaurants (46%) and non-food shops (45%). Results show a range of shops/services are being used by residents in Ayr town centre.

Figure 7.9 Types of shopping of services used

What did you buy/what services did you use? Base 160



7.10 For each of the types of shopping or services used on their last visit, residents were asked their spend**,** using a range of spend categories. Taking the mid-point values from the categories above (and assuming 'more than £100' as £100), the average spend has been calculated, based on those who gave an answer. Average spend on food shopping was highest (£22.37) and over £10 was spent, on average, on business/financial services and non-food shopping. The total average spend in the town centre on residents' last visits was £62.93

Table 7.10 Average spend on last occasion

Business and Financial Services	£11.45
Bar/Cafe/Restaurant	£7.47
Retail (non-food)	£10.28
Retail (food)	£22.37
Takeaway and Fast Food	£1.13
Health Services (e.g. dentist, opticians)	£4.16
Health/Beauty Services (e.g. hairdresser, nail salon)	£6.07
Total	**£62.93**

Reasons for usage of town centre

7.11 Table 7.11 shows the key spontaneous reasons residents gave for using the town centre rather than somewhere else on this last occasion. This was asked as an open-ended question and respondent verbatim answers were coded into categories. The key category was that of convenience (61%) and also positive comments on shops (40%). A selection of verbatim comments is shown in Table 7.11.1 and full listing of comments can be found in the appendices

Table 7.11 Reasons for using town centre

Why are you using the shops/services in this town centre as opposed to using somewhere else?

Base: 160	
	%
Convenience generally	61
Positive to shops/service	40
Positive to people/friendly	1
Use specific shops/services	2
Support local shops/service	3
Closeness to work	4
General positive comments	14

Table 7.11.1 Example of verbatim reasons for using town centre

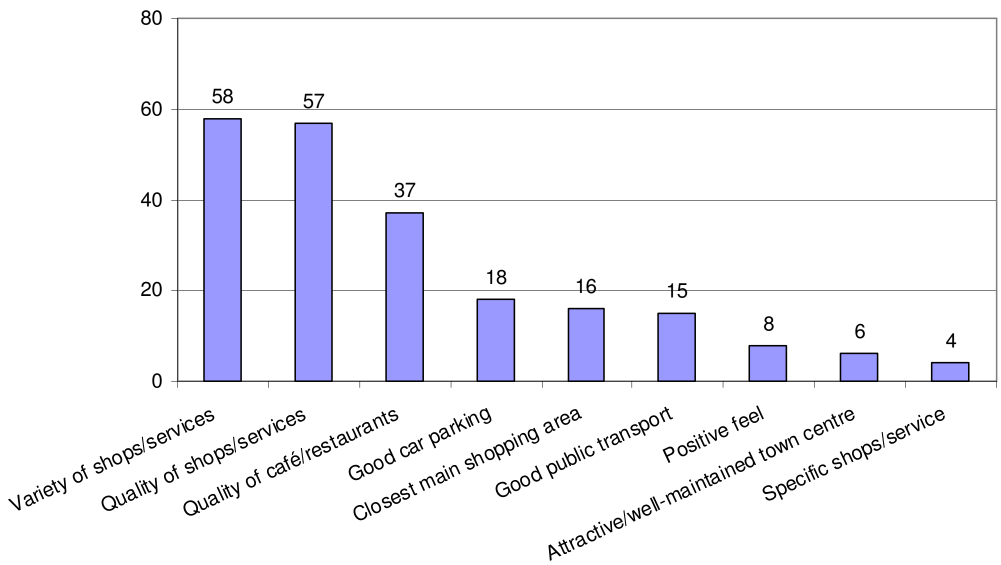
Reasons to use	**Town Centre**
Convenience generally	*"Nearest to us and still have some reasonably good shops"* *"It's where my services are"* *"Handy to get to"* *"Can get to all the shops easily".* *"On my doorstep, couldn't be handier, good range of shops"*
Positive to shops/services	*"Try and support local trade"* *"Have most of the types I need and most are reasonably priced"* *"Type of shops suit me, like style and type of shops"* *"I like the centre and its style. Old world - like New Market Street"* *"Has must of the shops I need and they are reasonably priced. Quality for some of them makes me use them"* *"Still has some good shops that cover my needs"*
General positive	*"Meet friends there. Nice cafes"* *"Supporting local area, traders"*

7.12 Residents were shown a list of reasons for using the shops or services in the town centre and asked to select **one main** reason. The most common main reason for using the town centre was because it was the closest main shopping centre – 82% of residents gave this as their main reason. The only other significant main reason was variety of shops (6%).

7.13 Residents were then asked to select any **other reasons** for using the town centre from the list provided and the range of answers is shown in Figure 7.13. The variety (58%) and quality (57%) of shops and services were the key other reasons, followed by quality of cafes/restaurants (37%). Reasons such as parking/public transport and the environment/feel of the town were less commonly mentioned.

Figure 7.13 Other reason for visit

What OTHER reasons for using shops/ services in this town centre? Base 160

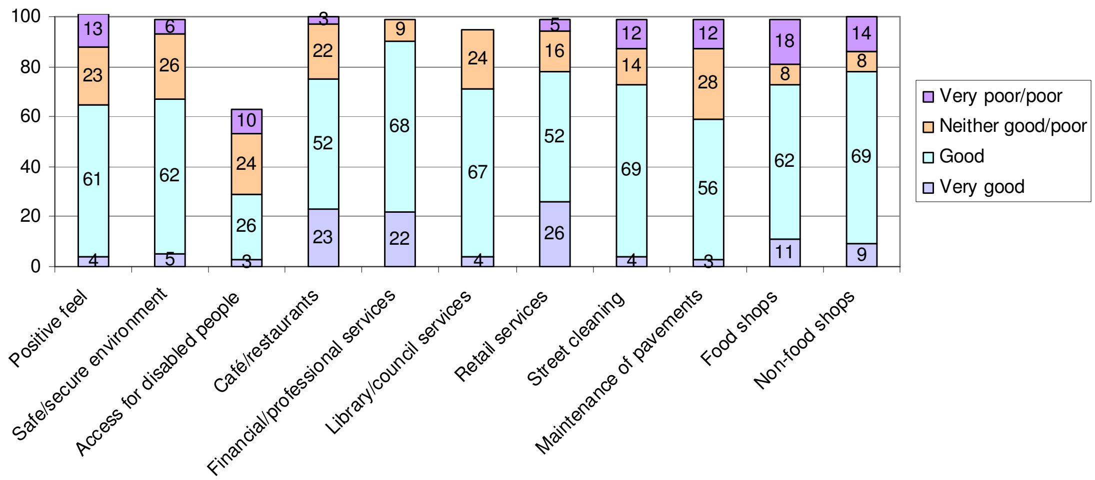


Attitudes and factors that would encourage usage

7.14 A list of features about the town centre was shown and residents asked to rate each one as: very good, good, neither good nor poor, poor or very poor. Table 7.14 shows those statements which were rated positively. Features most commonly rated as **very good** tended to be the service outlets: retail services (26%), financial/professional services (22%) and cafes/restaurants (23%). Other features which were commonly rated as **good** included non-food shops (69%), street cleaning (69%), library/public hall/ Council services (67%) and safe/secure environment (62%).

Table 7.14 Attitudes towards town centre

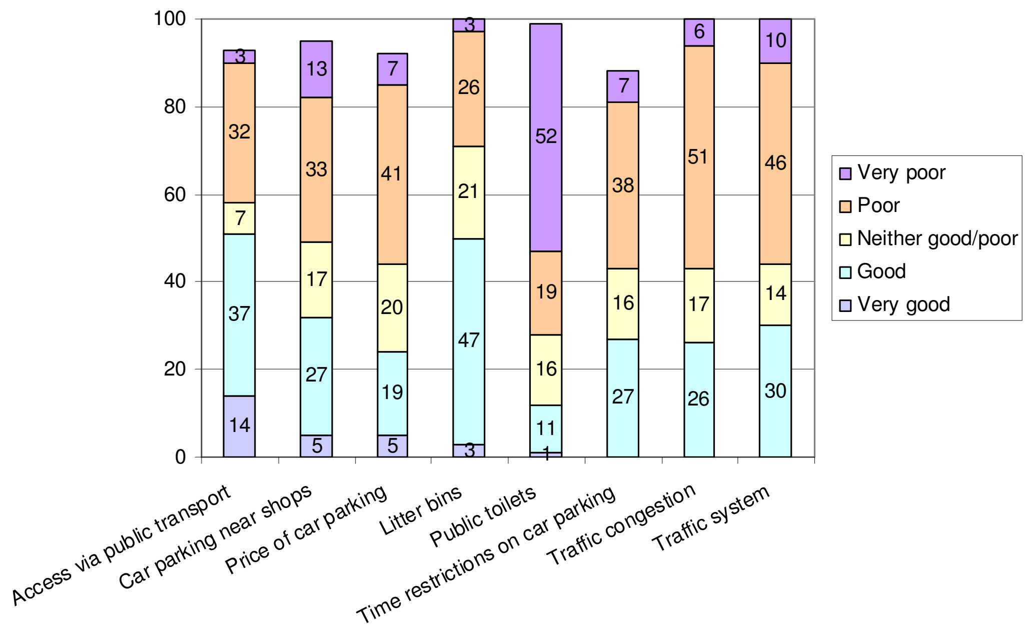
How do you rate this town centre with regard to the following? Base 160



7.15 The feature rated most commonly as **very poor** was availability of public toilets (52%). Other features rated commonly as **poor** included those associated with traffic, access to the town centre or parking: traffic congestion (51%), traffic system (46%), price of parking (41%) and time restrictions on car parking (38%).

Table 7.15 Attitudes towards town centre

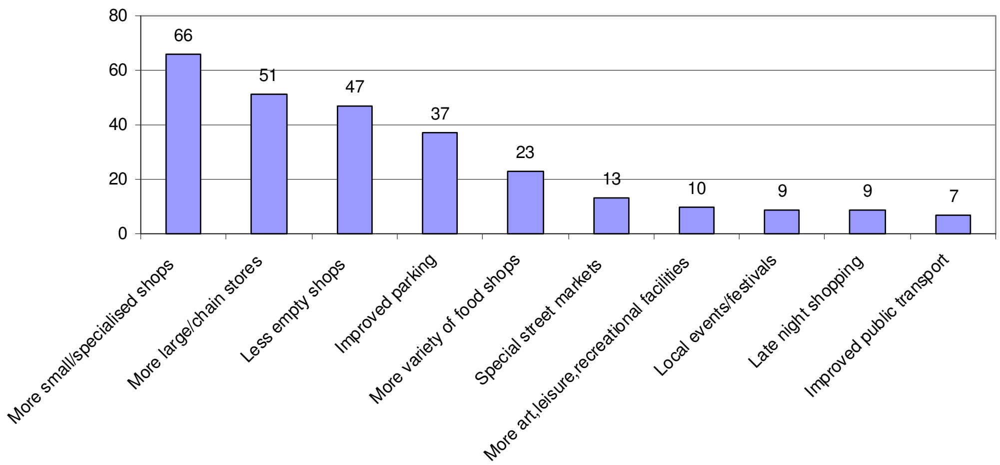
How do you rate this town centre with regard to the following? Base 160



7.16 Table 7.16 shows the changes to town centre which would encourage residents to use the town centre more often; residents were asked to provide up to three changes from a list and the most common responses are shown below. The most popular changes were: more small/specialised shops (66%), more large/chain stores (51%), less empty shops (47%) and improved parking (37%).

Table 7.16 Changes to attract more usage of town centre

Which, if any, of these changes to shops/service would encourage you to use this town centre more? Base 159

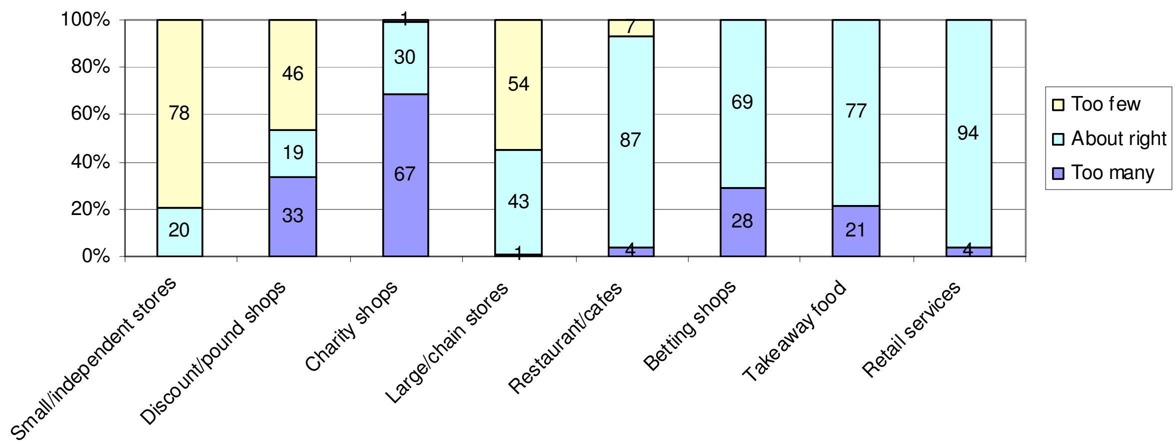


7.17 Residents were shown a list of different types of outlets in the town centre; for each they were asked if there were: too many, about right or too few**.** Residents felt there were too few small/independent stores (78%), too few large chain stores (54%) and too many charity shops (67%).

Table 7.17 Attitudes towards types of outlets

What do you think about the number of these types of outlets in this town centre?

Base 160



7.18 Table 7.18 shows the spontaneous categories which residents felt would improve their shopping experience in the town centre. This was asked as an open-ended question and respondent verbatim answers were coded into categories. The key category was that of improvements to shops/services (59) followed by improved parking (27%) and fill empty shops (25%). A selection of verbatim comments is shown in Table 7.18.1 and full listing of comments can be found in the appendices.

Table 7.18 Improvements to shopping experience

What do you think would improve your shopping experience in this town centre?

Base: 142	%
Improvements to shops/services	59
Improvement to parking	27
Fill empty shops	25
Less traffic/improvements	5
Improve public transport	1

Table 7.18.1 Example of verbatim reasons for improving town centre

Reasons to use	Town Centre
Improvements to shops/services	*"A better all-round variety of shops and style of shop with a range of shops"* *"General make-over, town centre is depressing lacks atmosphere"* *"Fill empty shops with independent food etc, butchers and fishmonger"* *"Kyle Centre is needing more shops - this is in middle of High Street- not good"* *"Lots of empty shop, lost a lot of it's character by moving shops at High Street into Mall"* *"Let the premises at the bottom of the High Street, Revamp New Market Street, bring more shops to the Kyle"*
Better/cheaper parking	*"Parking is poor in the town centre"* *"Centre of town is poor for parking and there's a full charge"* *"Pay £50 p.a. for parking; it should be free"*
Fill empty shops	*"Get rid of all the empty shops. Get back the indoor malls we used to have, Improve the fronts of some of the shops"* *"Open the empty shops"*

Usage of different locations for shopping/services

7.19 Residents were shown a list of locations for different types of shopping and services and asked to select their **one main** location for each. Ayr, and particularly Ayr town centre, was the primary location for shopping and particularly for services.

Table 7.19 Main location for shopping and service types

Which of these shopping areas is your MAIN location for each of these types of shopping or services? Base 160

Base: 160	Food	Non-food	Financial services	Retail services	Café/ restaurant
	%	%	%	%	%
Ayr, Heathfield	36	12	1	2	1
Ayr, Town Centre	**58**	**68**	**90**	**84**	**82**
Irvine Rivergate/Town	2	3	2	2	2
Kilmarnock Town Centre	1	3	1	1	2
Prestwick Town Centre	1	1	3	5	8
Silverburn	1	6	0	0	1
Glasgow City	0	3	0	1	1

7.20 Residents were then asked to select any **other locations** for shopping and services and responses are shown in Table 7.20. Prestwick is a key support location for Ayr residents and also Glasgow City, Silverburn and Braehead for non-food shopping and cafés/restaurants.

Table 7.20 Other locations used for shopping and services

Which of these shopping areas are OTHER locations for these types of shopping or services? Base 160

Base: 160	Food	Non-food	Financial services	Retail services	Café/ restaurant
	%	%	%	%	%
Ayr, Heathfield	44	37	4	2	6
Ayr, Town Centre	30	24	29	24	20
Irvine Rivergate/Town	8	10	3	3	4
Kilmarnock Town Centre	7	11	4	2	9
Prestwick Town Centre	20	17	29	25	39
Silverburn	12	29	4	2	14
Glasgow City	1	45	18	8	31
Braehead	3	23	0	0	15

7.21 Residents were given a list of reasons why they might mainly use a shopping or service location and asked to select as many as applied. The closeness of location was the key reason for choice of location; also, variety of shops and services (44%) for non-food shopping.

Table 5.21 Reasons to use main location for shopping and services
What are your reasons for using this location for this type of shopping/services?
Base 160

Base: 160	Food	Non-food	Financial services	Retail services	Café/ restaurant
	%	%	%	%	%
Closest main shopping area	79	76	63	58	56
Variety of shops and services	37	44	22	37	17
Quality of shops and services	20	26	18	35	18
Quality of cafes/restaurants	2	4	3	3	51
Good car parking	3	27	4	1	3
Good public transport	12	13	9	9	8

Evening usage of town centre

7.22 50% of residents visited the town centre facilities in the evening. Of those who did not, 39% preferred to go elsewhere.

7.23 Table 7.23 shows the most common purposes of visiting the town centre in the evening.

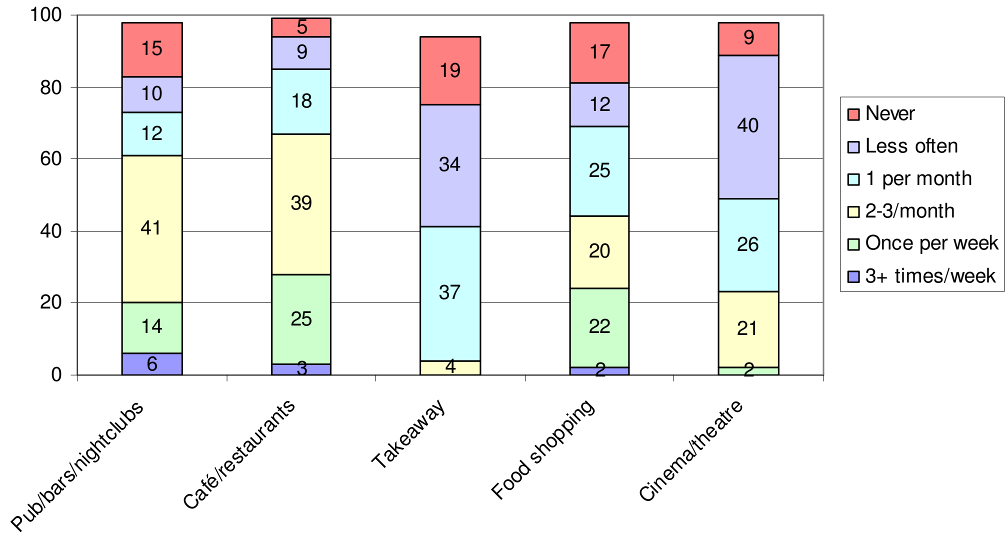
Table 7.23 Purpose of visits to town in evening
For what purposes do you visit the town centre in the evening?

Base: 80	
	%
Café/restaurant	76
Pub/bar/nightclub	69
Cinema/theatre	68
Takeaway	43
Food shopping	29
Sports, gym, health and fitness	5
Society/club	5

7.24 Residents were asked how often they visited different types of venues in the evening and the responses for the most common elements are shown below. 28% of those that use the town centre in the evening visit cafes/restaurants and 20% visit pubs/bars/nightclubs at least once a week

Table 7.24 Frequency of using town centre in evening

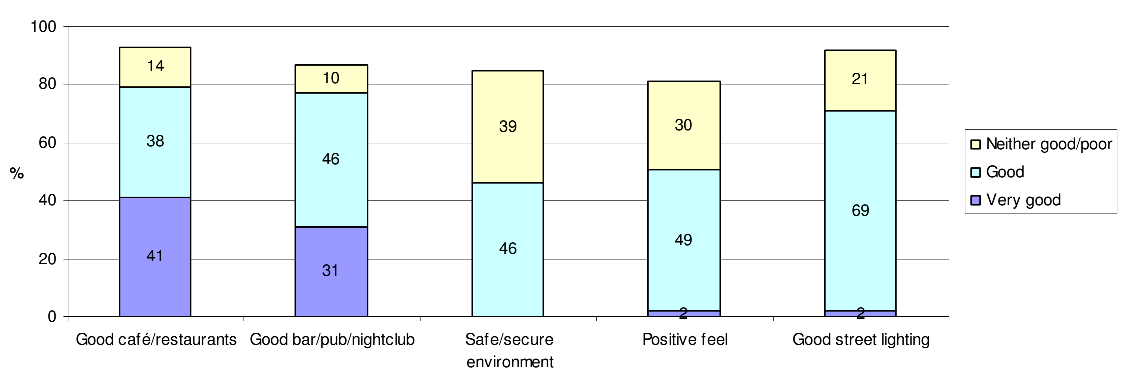
How often do you go into this town centre in the evening for these things? Base 80



7.25 A list of attributes of the town centre in the evening was shown and shoppers were asked to rate each one as: very good, good, neither good nor poor, poor or very poor. Table 7.25 shows statements which were generally rated positively: highest for **very good** were: good cafés/restaurants (41%) and good pubs/bars/nightclubs (31%). 46% gave a **good** rating for safe/secure environment and 49% gave a good rating for a positive feel.

Table 7.25 Attitudes towards town centre in evening

When you visit the town centre in the evening, how do you rate it with regard to these? Base 80



7.26 Table 7.26 shows features which were generally rated more negatively. Features rated most commonly as **poor/very poor** included variety of things to do (54%) and available car parking (47%)

Table 7.26 Attitudes towards town centre in evening

When you visit the town centre in the evening, how do you rate it with regard to these? Base 80