Cameron Research
Strategic Research & Planning

ibp Strategy & Research

South Ayrshire Town Centre Assessment

Maybole Town Centre: Shopper and Resident Surveys

November 2014

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

European Union
European Regional Development Fund
Investing in your future

A project supported by the European Union's INTERREG IVA Programme managed by the EU Programmes Body

south AYRSHIRE COUNCIL

CONTENTS

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 Maybole Shoppers and Residents surveys. The Business surveys and the South Ayrshire Residents survey are detailed in separate reports.**

Methodology

1.9 **Shopper Survey**: 100 face-to-face interviews were undertaken with shoppers in Maybole Town Centre. Shoppers were randomly recruited at a central location in the High Street.

1.10 **Residents Survey**: 75 face-to-face interviews were undertaken with residents within Maybole 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 MAYBOLE CONCLUSIONS: SHOPPER AND RESIDENT

Shoppers and residents are primarily visiting Maybole town centre for food shopping and, to a lesser extent, the financial/professional services and food/drink outlets. Frequency of visiting these premises is contributing to usage of Maybole town centre and will be important to maintain the status of these – and potentially to improve them.

The key spontaneous and prompted reason for visiting the town centre was the convenience of it being a main shopping area; other reasons for visiting were relatively low. Food shopping is an important factor in usage of Maybole town centre, but a high proportion of shoppers and residents are also using Ayr town centre/Ayr Heathfield for their main food shopping and, in particular, for their non-food shopping.

Important factors relating to positive views of the town centre was the presence of financial/professional services, cafes/restaurants, the safe/secure environment and access by public transport. Of clear concern was the traffic congestion and traffic system in the town centre which generated a high amount of spontaneous and prompted feedback from shoppers and residents. Improvements could also be considered in provision of public toilets and of public seating and in the provision of more non-food shops.

Further opportunities exist to improve the shopping experience with the provision of more shops of different types: more large/chain stores, more discount/pound shops, better variety of food shops and more small/independent shops. The convenience of visiting local outlets in Maybole drives usage but, for many, the variety and quality of shops/services is achieved by visiting Ayr town centre and, to a lesser extent, to Ayr Heathfield.

Analysis of evening usage of Maybole is limited by a small analysis base, but directionally there is an opportunity to increase the variety of things to do in evening.

3.0 OVERALL SUMMARY: MAYBOLE SHOPPER AND RESIDENT

Profile of shoppers and residents

65% of shoppers were female, which is expected in town centre 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 53% of shoppers and 44% of residents aged 55+.

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 Maybole town centre.

Overall usage

The main purpose for visiting Maybole town centre was for food shopping, by shoppers and residents alike; residents are more likely to be using financial/professional services and food/drink outlets such as takeaway/sandwich shops and cafes/restaurants. Frequency of food shopping at least 3 times a week was 57% among residents and 54% among shoppers, showing that the presence of this retail sector is contributing to usage of the town centre. Residents were making higher weekly use of financial/professional services than shoppers.

Frequency of usage of the town centre in the past year is very stable. Time spent in the town centre is relatively quick, with the majority of respondents spending less than two hours overall and around half walking to the town centre, suggesting usage from the immediate vicinity which benefits convenience.

Purchase behaviour

The main purchases made generally reflect the higher usage of food shops in Maybole and also of the business/financial services. The average total spend by shoppers on the occasion of their last visit was £33.11 and the average total for residents on their most recent visit was £31.21.

The **main** prompted reason for using Maybole shops/services was the convenience of it being the closest shopping area (84% of residents and 69% of shoppers). **Other** prompted reasons for usage were relatively low.

Attitudes and factors that would increase usage

The main town centre features most commonly rated positively were financial/professional services, cafes/restaurants and positive feel. Also receiving positive ratings were safe/secure environment, access to public transport and library/public hall/council facilities. Shoppers and residents rated the town centre relatively negatively for traffic congestion and traffic system *"Bypass, huge fast lorries is dangerous", "A bypass is badly needed".* Provision of non-food shops and availability of public toilets were also more commonly rated negatively.

The most popular prompted change to the shops/services to encourage increased usage of the town centre was the overall provision of more shops: large/chain stores, small/specialised shops, less empty shops and better variety of food shops: *"It needs everything – more clothing, shoes and a freezer shop", "More shops, there is actually nothing here, you have to go to Ayr".* Both surveys felt there were too few large/chain stores and discount/pound shops.

Usage of different locations for shopping/services

The main locations used by residents and shoppers were Maybole town centre for services, Ayr town centre for non-food shopping and Ayr Heathfield for food shopping. Closeness to a main shopping area was a key reason for usage and, to a lesser extent, the variety and quality of shops/services.

Evening usage of town centre

A small proportion of shoppers and resident visited Maybole town centre in the evening and further statistical analysis is not possible. However, the town centre features commonly receiving negative ratings for evening usage were: variety of things to do and availability of car parking.

4.0 MAYBOLE SHOPPER SUMMARY

Shopper profile

There was a female skew to the shopper profile, with 65% of respondents being female and 35% male; a female gender skew is typical for shopper surveys of this type. Shoppers were from a range of age groups, with 53% over the age of 55. The occupational status of the head of household was mainly working (47%) and 34% were retired.

The majority of shoppers lived locally (68%), a further 15% worked in the town centre and 16% were visitors to the area.

Overall usage

The **main** purposes for visiting the town centre was for food shopping (39%), financial/professional services (13%) and business/work (13%). **Other** purposes were showed a broader set of responses: food shopping (23%), non-food shopping (18%), financial/professional services (17%) and takeaway/sandwich shops (13%). Respondents were making frequent shopping trips to Maybole town centre for shopping: 54% visited at least 3 times a week for food shopping, 29% for financial/professional services and 25% for non-food shopping.

Frequency of usage of Maybole town centre has been very stable in the past year – 85% of shoppers use it about the same frequency. 47% of shoppers used a car to travel to the town centre, with 43% walking. The majority of shoppers (57%) intended to spend under 1 hour in the town centre and further 32% to spend 1-2 hours.

Purchase behaviour

Purchases made or service used (or intended) reflected the dominance of food shopping in Maybole: 57% for food retail, 41% for business/financial services, 23% for non-food retail and 20% bar/café/restaurants (20%). There was an average of £11.25 spent on food shopping and the average spend on other categories being under £10. The total average spend in Maybole town centre on the occasion of this visit was £33.11.

The key **main** reason for shopping in Maybole was clearly the convenience of it being the closest main shopping area; this was provided by 73% of shoppers as a spontaneous reason and 69% when prompted: *"Handy for me", "Just live 10 minutes away", "Live in this area so these are the closest"*. **Other** reasons for shopping were relatively low i.e. to visit special shops/services (17%) and quality of shops/services (12%).

Attitudes and factors that would increase usage

Features of Maybole town centre rated higher as **very good/good** were: street cleaning (72%), financial/professional services (68%), positive feel (61%), cafes/restaurants (60%), safe/secure environment (57%) and library/public hall/council services (59%). A number of features were rated higher as **very poor/poor:** non-food shopping (35%), provision of public toilets (37%), availability of public seating (34%) and food shopping (28%). Of particular concern to shoppers was the traffic in town centre: traffic congestion and traffic system both received 90% rating as poor/very poor.

The key spontaneous improvements for shopping in the town centre were the traffic (66%) and better shops (46%): *"Bypass, huge fast lorries is dangerous", "A bypass is badly needed", "More chain stores like Farmfoods or Iceland", "A good variety of shops, clothing shoes kids shops", "A bigger supermarket but cheaper".*

The most popular changes to shops/services which would encourage increased usage of the town centre were the overall provision of more shops: more small/specialised shops (67%), more large/chain stores (50%), less empty shops (44%) and more variety of food shops (31%). The opportunity for provision of improved shopping in town centre was confirmed when shoppers were asked about the balance of different types of outlets in town centre: 72% felt there were too few large/chain stores, 59% too few small/independent shops and 49% too few discount/pound shops.

Usage of different locations for shopping/services

The **main** locations for food shopping were Ayr Heathfield (30%) and Ayr town centre (33%); 53% primarily used Ayr Town centre for non-food shopping and the main location for financial services was Maybole town centre (46%), although 38% used Ayr town centre. **Other** location usage confirms Ayr town centre as a key support location for shopping and use of café/restaurants. Closeness to a main shopping area was the key reason for usage and a good variety of shops/services was also a key factor.

Evening usage of town centre

Only 18% of shoppers visited the town centre in the evening and the numerical base of 18 is too low for numerical analysis of usage of, and attitudes towards, Maybole town centre; directionally the features most commonly rated as **very poor/poor** were: variety of things to do in the evening and availability of car parking.

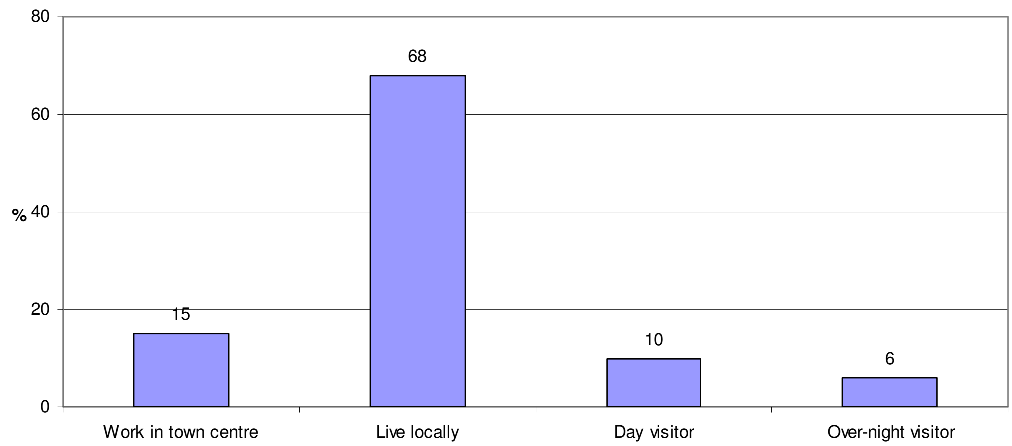
5.0 MAYBOLE SHOPPER KEY FINDINGS: TOWN CENTRE

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. The majority (68%) lived locally, 15% worked in the town centre and 16% were visitors to the area. Further detailed analysis of the data shows that 12% of visitors live outside South Ayrshire.

Figure 5.1 Type of visitor to town centre

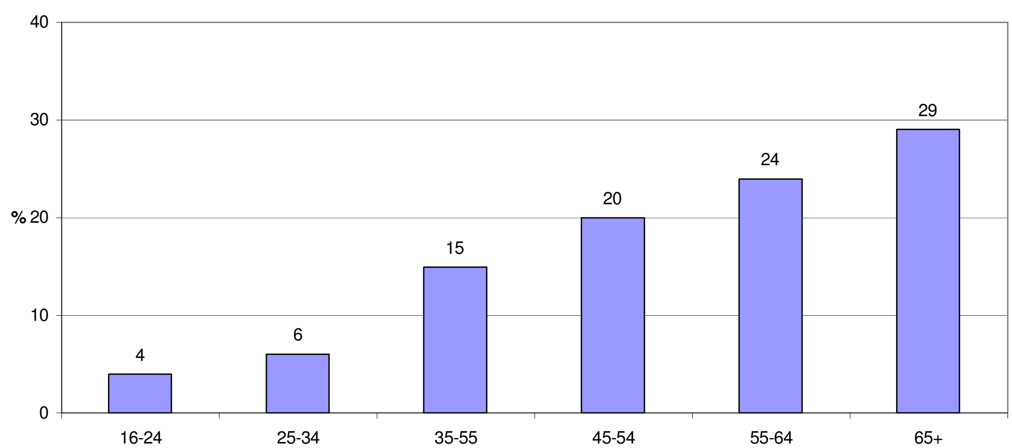
Which type of visitor to this town centre best describes you today? Base 100



5.2 There was a female skew to the shopper profile, with 65% female and 35% male; this profile is typical of this type of shopper survey. The age group profile of visitors is shown in Figure 5.2, 53% of shoppers were aged 55+.

Figure 5.2 Age of visitor to town centre

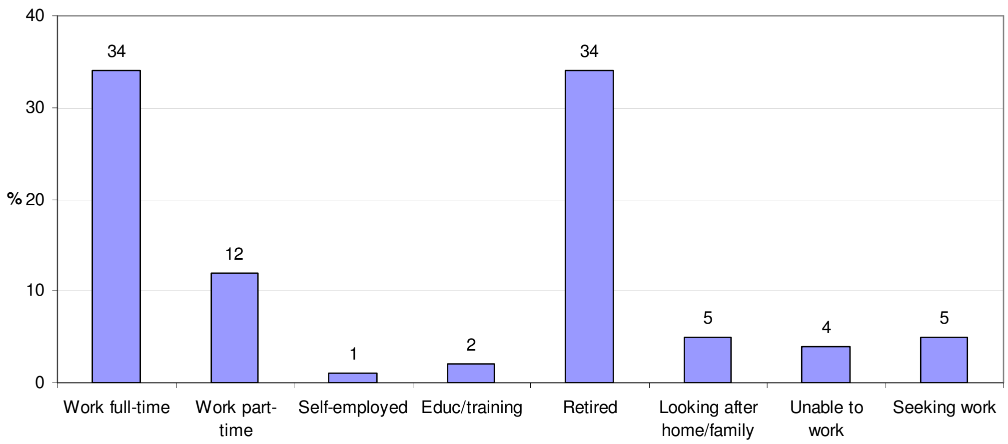
Into which of these age bands do you fall? Base 100



5.3 Analysis of the occupational status of the head of household for shoppers shows that the majority were working: 34% were working full time and a further 12% part-time. 34% 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 100

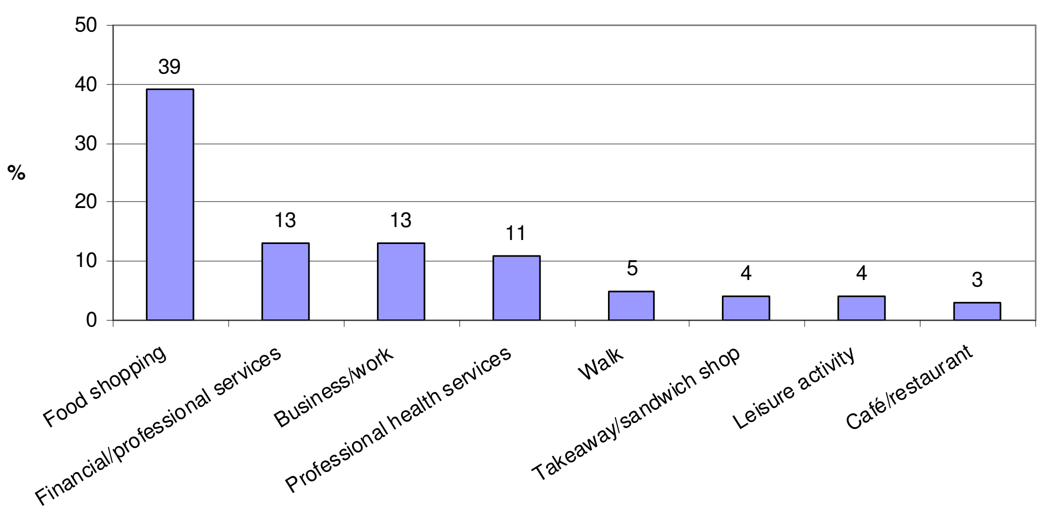


Overall usage

5.4 Shoppers were shown a list and asked to select **one main** purpose for their current visit. The most common responses are shown below. Food shopping was the highest main purpose (39%), use of financial/professional services (i.e. bank, solicitor) was 13% and use of professional health services (i.e. dentist, optician) was 11%. Other main reasons to visit were relatively low.

Figure 5.4 Main purpose for visit

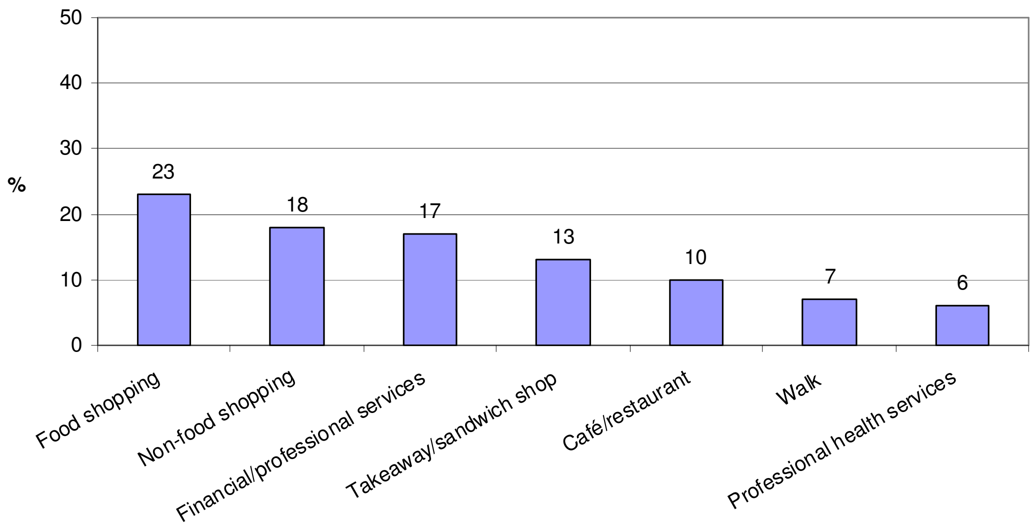
What is your MAIN reason for visiting this town centre today? Base 100



5.5 Shoppers were then asked to select any **other purposes** for their current visit and those most commonly mentioned are shown below. This generated a slightly broader range of purposes: food shopping 23%, non-food shopping 18%, financial/professional services 17%, takeaway/sandwich shops 13% and café/restaurants 10%.

Figure 5.5 Other purposes for visit

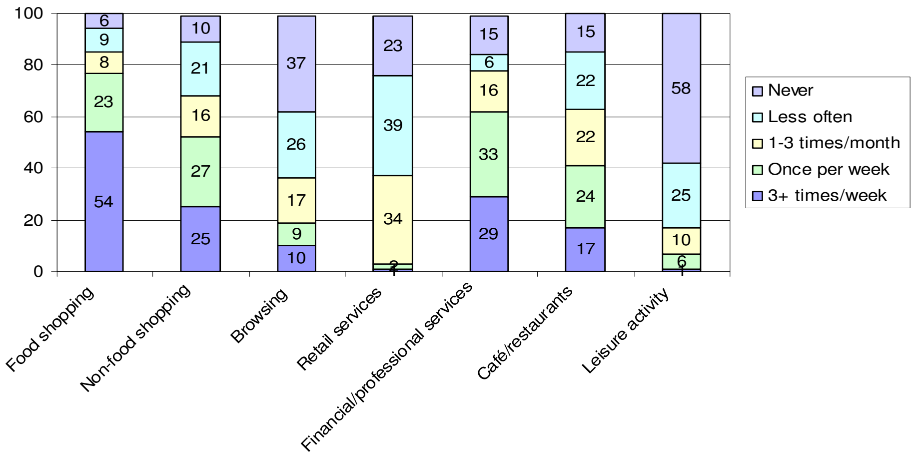
What OTHER reasons do you have for visiting this town centre today? Base 100



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. 54% of respondents visit at least 3 times a week for food shopping and 29% visit at least 3 times a week for professional/financial services and 25% for non-food shopping. However, 58% of respondents never visit the town centre for a leisure activity and 37% never browse/window shop in town[1].

Figure 5.6 Frequency of usage[2]

How often do you visit this town centre during the day? Base 100



5.7 Figure 5.7 shows how the frequency of shopper visits to town centre has changed over the last year. The majority (85%) are using the centre about the same frequency as last year, reflecting stability in usage. The main reason for changed usage was due to personal circumstances and a full listing of reasons 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: 100	
	%
More often	4
About the same	85
Less often	10

[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.

5.8 Table 5.8 shows that 47% of shoppers used a car to travel to the town centre on this occasion and 43% walked.

Table 5.8 Method of transport to travel to town centre
How did you travel to this town centre today?

Base: 100	
	%
Car	47
Walk	43
Bus	7

5.9 Table 5.9 shows that over half (57%) were planning to spend less than 1 hour in the town centre and 32% intended to spend between 1-2 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?

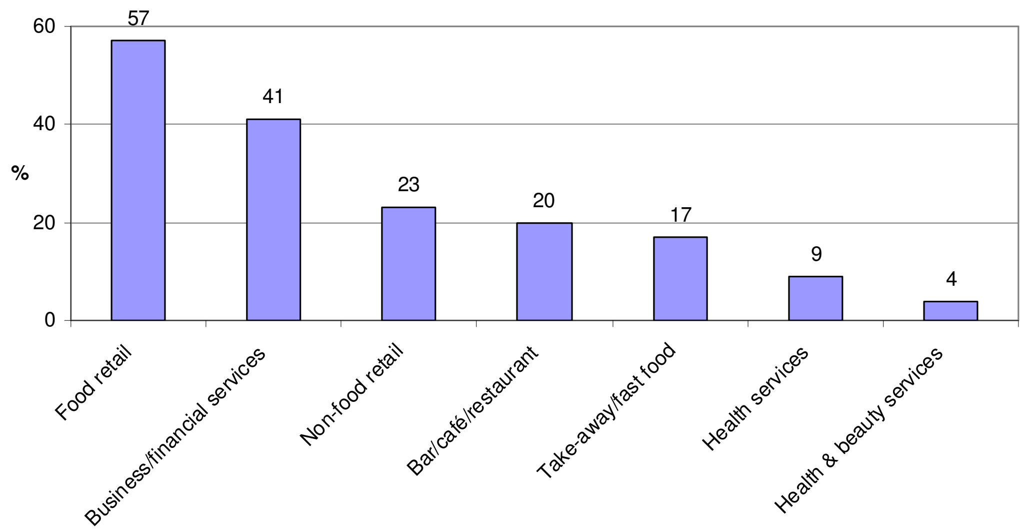
Base: 100	
	%
Less than 1 hour	57
1-2 hours	32
3-4 hours	5
5-6 hours	3
All day	3

Purchase behaviour

5.10 The main types of purchases made or services used (or intended to) were: food retail (57%), business/financial services (41%), non-food retail (23%) and bar/café/restaurants (20%).

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? Base 100



5.11 For each of the types of shopping or services used or intended to use, shoppers were asked their spend/likely spend on this occasion, using a range of spend categories. Taking the mid-point values from the various categories of expenditure (and assuming 'more than £100' as £100), the average spend per shopping/service type has been calculated, based on those who gave an answer. Food shopping has the highest average spend (£11.25) and the total average spend in the town centre on this occasion was £33.11

Table 5.11 Average spend on this occasion

Business and Financial Services	£8.70
Bar/Cafe/Restaurant	£2.45
Retail (non-food)	£1.70
Retail (food)	£11.25
Takeaway and Fast Food	£1.94
Health Services (e.g. dentist, opticians)	£2.69
Health and Beauty Services (e.g. hairdresser, nail salon)	£3.11
Other	£1.28
Total	**£33.11**

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. The key category was that of convenience (73%). A selection of verbatim comments is shown in Table 5.12.1 and full listing of comments can be found in the appendices.

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: 81	
	%
Convenience generally	73
Closeness to work	12
Specific shops/service	9
Friends/family	5
Passing through	4

Table 5.12.1 Example of verbatim reasons for using town centre

Reasons to use	**Town Centre**
Convenience generally	"Handy from where I stay" "I just live 10 minutes away from it" "It's the closest to where I live" "I live in this area, so these shops are the closest." "It's walking distance for me"
Closeness to work	"I work on Main Street" "It's the closest to where I live"
Specific shop/service	"My dentist is here" "My local hairdresser is here" "Fruit shop and butchers are great quality"

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**. Confirming the spontaneous answer shown in Section 5.12, proximity as a main shopping area was the primary prompted reason to visit Maybole town centre (69%). Other reasons were: to visit specific shops/services (17%), quality of shops/services (12%) and quality of café/restaurants (8%).

Figure 5.13 Reasons for visit

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

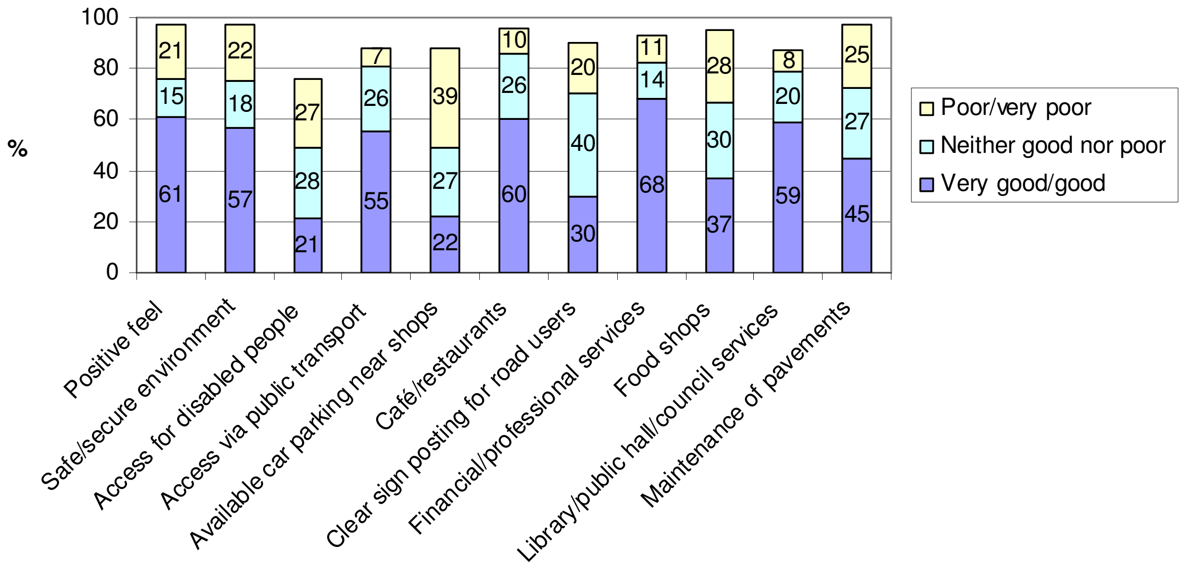
Base: 100	Main reason	Other reasons
	%	%
Closest main shopping area	**69**	5
Specific shop/service	9	17
Quality of shops/services	4	12
Quality of café/restaurants	3	8
Attractive/well-maintained centre	2	5
Positive feel to town centre	2	4
Good public transport	1	2
Good car parking	0	4
Variety of shops/services	0	2
Other answers	5	9

Attitudes and factors that would encourage usage

5.14 A list of town centre features was shown and shoppers asked to rate each one as: very good, good, neither good nor poor, poor or very poor. A summary of ratings for the first 10 features is shown in Figure 5.14 and the remaining features in Figure 5.15. Features commonly rated as very good/good were: financial/professional services (68%), positive feel (61%), café/restaurants (60%), safe/secure environment (57%) and library/public halls/council services (59%). A number of features were commonly rated as poor/very poor: available car parking near shops (39%), access for disabled people (27%), food shopping (28%) and maintenance of pavements (25%).

Figure 5.14 Attitudes towards town centre

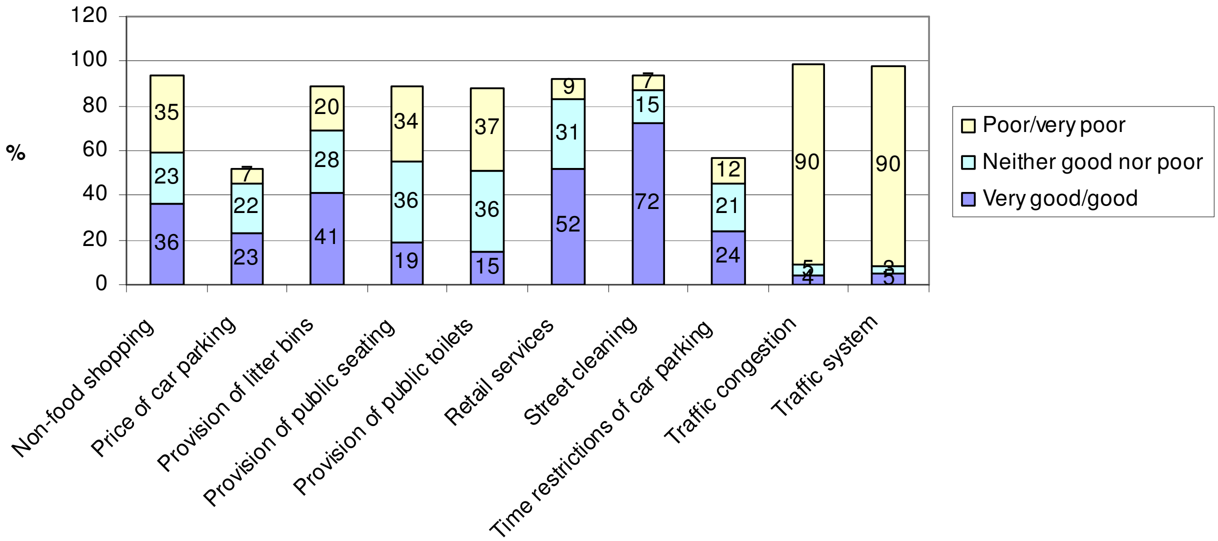
How do you rate this town centre with regard to the following? Base 100



5.15 Analysis of the remaining town centre features shows features which were commonly rated as **very good/good**: street cleaning (72%) and retail services i.e. hair dresser, shoe repair (52%). Features which were commonly rated as **poor/very poor** were: traffic congestion (90%), traffic system (90%), non-food shopping (35%), provision of public seating (34%) and provision of public toilets (37%). The traffic issues in Maybole were of particular concern: separate data analysis shows these features received significant ratings as **very poor**: traffic congestion 61% and traffic system 59%.

Figure 5.15 Attitudes towards town centre

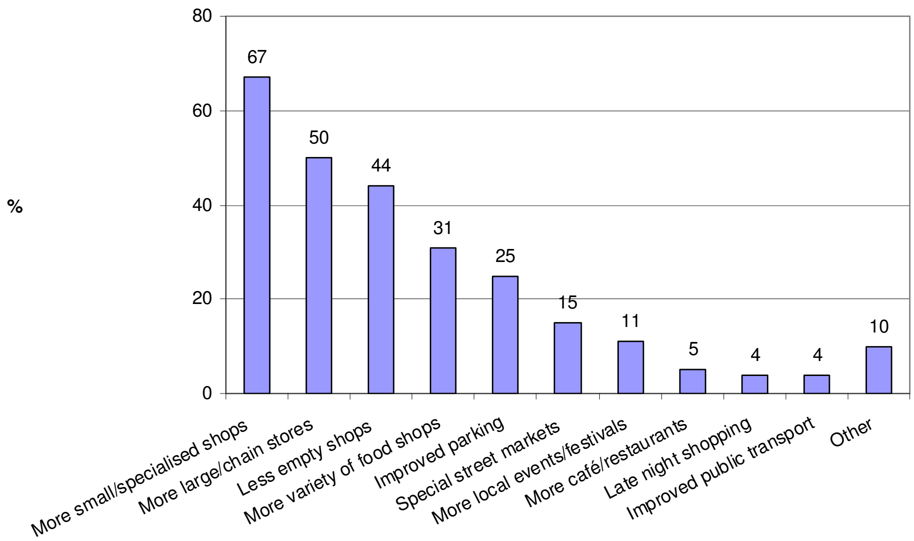
How do you rate this town centre with regard to the following? Base 100



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: more small/specialised shops (67%), more large/chain stores (50%), less empty shops (44%) and more variety of food stores (31%). The main 'other' answer was for a bypass or one-way system.

Figure 5.16 Changes to attract more usage of town centre

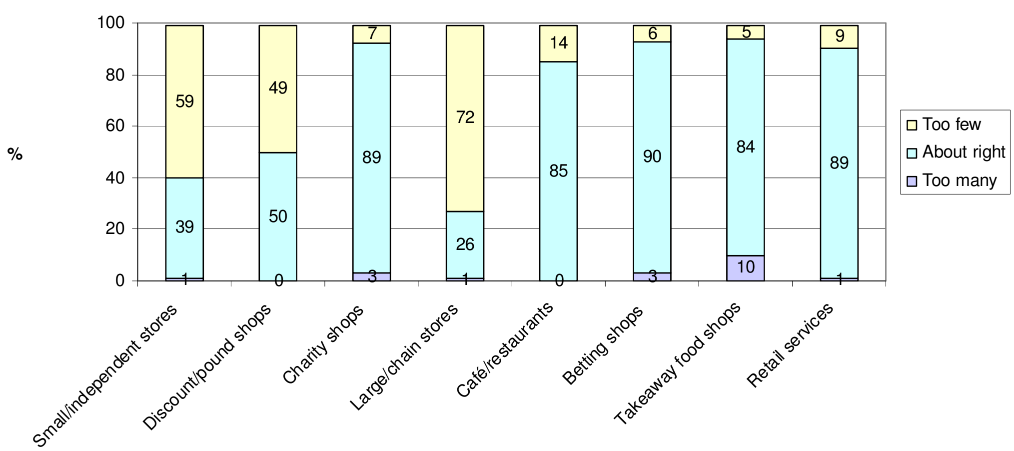
Which, if any, of these changes to shops/services would encourage you to use this town centre more? Base 100



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. For several types of outlets the balance was just right. However, 72% felt there were **too few** large/chain stores, 59% too few small/independent shops and 49% too few discount/pound 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 100



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 traffic (66%). 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: 82	
	%
Less traffic/traffic improvements	66
Improvements to shops	46
Better/cheaper parking	24
Fill empty shops	10

Table 5.18.1 Example of verbatim reasons for improving town centre

Reasons to use	**Town Centre**
Less traffic/traffic improvements	"A bypass is needed badly; the pavements are too narrow" "A bypass to get rid of congestion" " Bypass, do something about road, huge problem big fast lorries dangerous" "If they did something with the road, it's very dangerous, big lorries driving fast, old people struggle to cross the road"
Improvements to shops	"More food shops and a nice food place opened at night time, there is only a Chinese" "More chain stores, like Farmfoods or Iceland" "A good variety of shops - clothing; shoes; kids shops; a bigger supermarket but cheaper" "Could be doing with a cheap shop like Aldi or Lidl"
Better/cheaper parking	Needs more parking, there is hardly anywhere" "Trying to get parked when road is so busy" "Needs better parking with a crossing at the Whitehall"

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. Table 5.19 shows the most commonly mentioned locations used by these shoppers for different types of shopping or services. Ayr was the primary location used for food shopping; either Ayr Heathfield (30%) or Ayr town centre (33%). Ayr town centre was the primary location for non-food shopping (53%) and for café/restaurants (46%). The primary location for services was Maybole town centre (financial 46% and retail 38%), although over a third of respondents used Ayr town centre for these services (38% respectively).

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 100

	Food	Non-food	Financial services	Retail services	Café/ restaurant
	%	%	%	%	%
Ayr, Heathfield	30	13	2	1	1
Ayr, Town Centre	33	53	38	38	46
Girvan Town Centre	11	8	6	8	7
Irvine Rivergate/Town	2	2	1	2	1
Maybole Town Centre	**17**	**18**	**46**	**43**	**37**
Other/not answered	7	6	7	8	8

5.20 Shoppers were then asked to select any **other locations** for shopping and services and responses are shown in Table 5.20. Results show that Ayr town centre was the key other location for services and shops.

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 100

	Food	Non-food	Financial service	Retail services	Café/ restaurant
	%	%	%	%	%
Ayr, Heathfield	12	10	6	0	2
Ayr, Town Centre	20	27	21	18	34
Girvan Town Centre	12	11	6	6	12
Irvine Rivergate/Town	4	5	2	1	1
Maybole Town Centre	21	20	8	5	11
Prestwick Town Centre	1	1	2	0	3
Glasgow City Centre	0	3	1	0	3

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 as a main shopping area was the main reason for use. For food and non-food shopping, a good variety of shops/services was a key factor (32% and 33% respectively) and also quality of shops/services (26% respectively).

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?

	Food	**Non-food**	**Financial services**	**Retail services**	**Café/ restaurant**
	%	%	%	%	%
Closest main shopping area	**58**	**57**	**80**	**75**	**67**
Variety of shops and services	**32**	**33**	15	13	17
Quality of shops and services	**26**	**26**	6	9	11
Good car parking	14	11	10	8	8
Good public transport	6	5	5	4	5
Quality of café/restaurants	7	4	5	3	**8**

Evening usage of town centre

5.22 Of the 100 shoppers interviewed, 18% visited the town centre in the evening and 67% did not. Those who did not most commonly gave the following reasons: no need/ don’t go out 71% and prefer to go elsewhere 24%.

5.22 The base of shoppers who visit Maybole Town Centre in the evening is too low to show numerical analysis for the purposes and frequency of visiting town centre in the evening.

5.24 A list of features about the town centre in the evening was shown and shoppers asked to rate each one as: very good, good, neither good nor poor, poor or very poor. Statistical analysis cannot be conducted on the low base who answered this question but directionally the features which were commonly rated as **very poor/poor** were: variety of things to do in the evening and availability of car parking.

6.0 MAYBOLE 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% over the age of 55. The occupational status of the head of household was mainly working (48%) and 33% were retired.

Overall usage

The key **main** purposes for normally visiting the town centre were for food shopping (50%) and financial/professional services (30%). **Other** purposes most commonly mentioned were: financial/professional services (63%), non-food shopping (57%), professional health services (55%), takeaway/sandwich shops (52%) and café/restaurants (36%). Residents are making regular visits to the town centre: 57% visit at least three times a week for food shopping, 82% visit once a week for use of financial/professional services and 66% visit once a week for café/restaurants. The presence of these outlets is contributing to the frequency of usage of the town centre.

Frequency of usage of the town centre has been very stable in the past year – 98% claiming no change. 51% of residents normally walk to the town centre, reflecting the convenience and closeness, and 38% use a car. Time spent in the town centre is relatively quick: 90% generally spend under 2 hours in the town centre and 33% less than one hour.

Purchase behaviour

The main purchase made or services used at residents' most recent visits to the town centre were food shopping (63%), business/financial services (48%) and bar/restaurants (32%). The total average spend in the town centre on residents' most recent visit was **£31.21*.***

The key spontaneous and **main** prompted reason for residents visiting Maybole town centre was the convenience of it being the closest main shopping area (spontaneous 92% and prompted 84%): *"My local area", "It's within walking distance from my house", "Quickest to visit when I run out of something".* **Other** prompted reasons for using the town centre were relatively low: quality of shops/services (18%) and variety of shops/services (12%).

Attitudes and factors that would encourage usage

The town centre features in Maybole that were most commonly rated as **very good** were: financial/professional services (31%), cafes/restaurants (30%) and access via public transport (25%). Also rated highly as **good** were: library/public halls/council facilities (86%), street cleaning (79%), retail services i.e. hair dresser, shoe repair (72%), safe/secure environment (69%) and positive feel (66%).

Features most commonly rated as **very poor** included: traffic congestion (38%), traffic system (37%) and non-food shopping (16%). Features rated as **poor** included: traffic congestion (78%), traffic system (73%), non-food shopping (55%), provision of public toilets and seating (40% respectively).

The key spontaneous category to improve shoppers' experience in the town centre was better shops (78%): *"Everything – more clothing, shoes and a freezer shop", "More shops, there is actually nothing here, you have to go to Ayr" "More shops, food clothes basic needs and a decent restaurant"*

The most popular prompted changes which would encourage increased use of the town centre also concerned provision of shops: more small/specialist shops (62%), more large/chain stores (51%), more variety of food stores (45%) and less empty shops (45%). This is confirmed by analysis of the balance of the types of outlets in Maybole town centre: 93% of respondents felt there were too few large/chain stores, 84% too few small/independent stores, 53% too few discount/pound shops and 56% too few café/restaurants.

Usage of different locations for shopping/services

Ayr town centre was the **main** location for non-food shopping, Ayr Heathfield for food shopping and Maybole town centre for financial services. Ayr town centre was generally the most used **other** location. The key reason for usage of a location was it being the closest main shopping area and, to a lesser extent, the variety of shops/services.

Evening usage of town centre

Less than 10% of residents visited Maybole town centre in the evening and this is too low to show numerical analysis for the purposes and frequency of visiting town centre or for rating features.

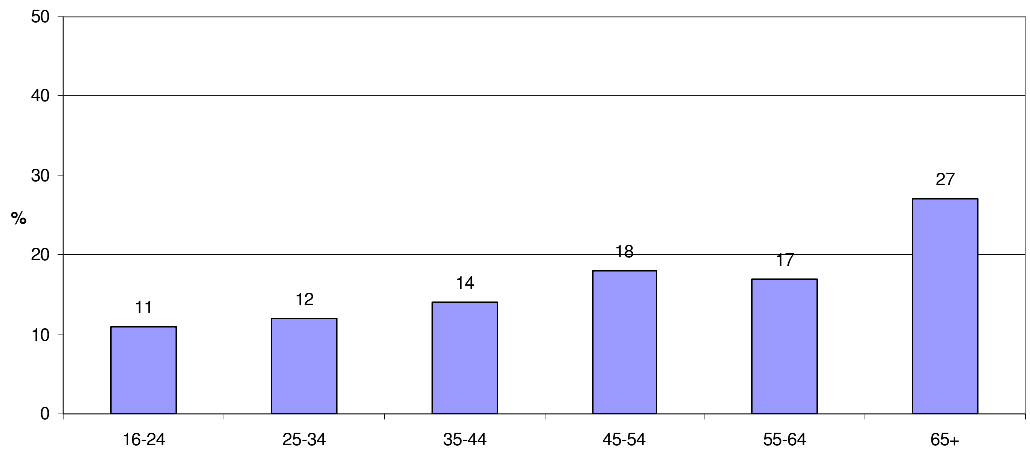
7.0 MAYBOLE RESIDENT KEY FINDINGS: TOWN CENTRE

Resident profile

7.1 The survey was designed to ensure that the reported gender and age profile of residents broadly matched the representative demographic profile of South Ayrshire residents. Accordingly, 53% of residents were female and 47% male. 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

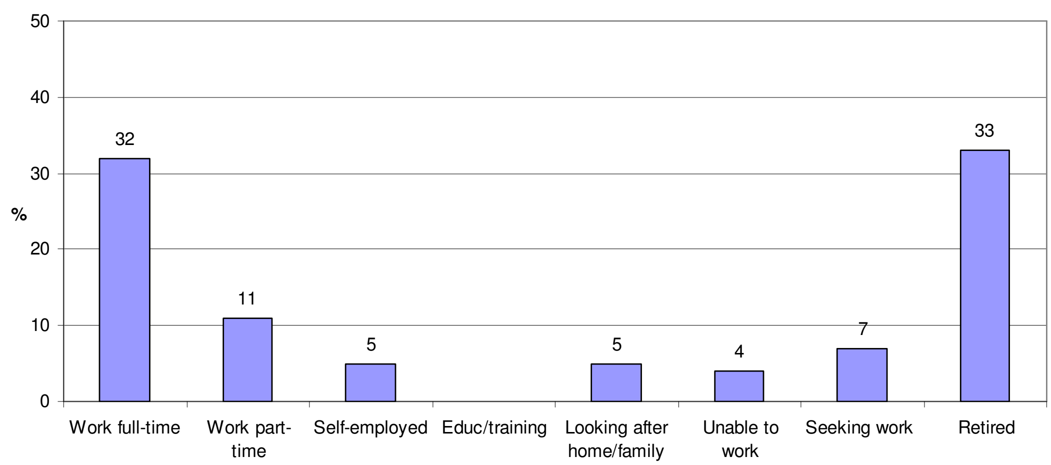
Into which of these age bands do you fall? Base 73



7.2 Analysis of the occupational status of the head of household for residents shows that 48% were working and 33% were retired.

Figure 7.2 Occupational status of head of household

Which best describes the current occupational status of your head of household? Base 73

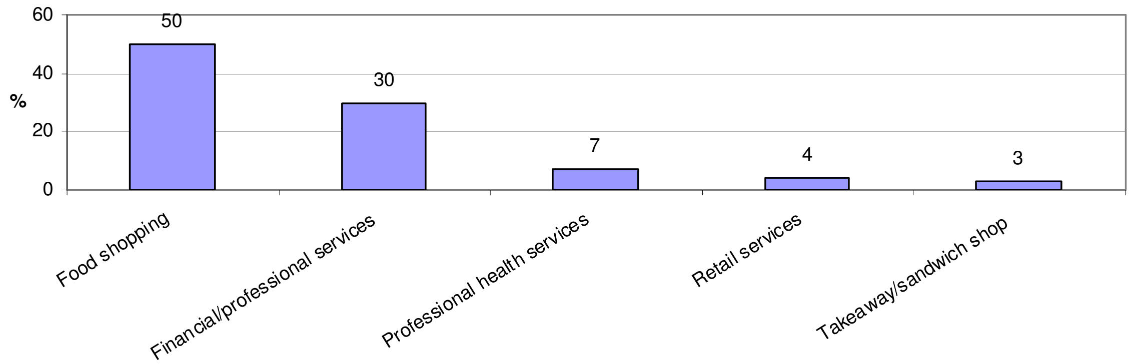


Overall usage

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 main purpose was food shopping (50%) and use of financial/professional services (30%).

Figure 7.3 Main purpose for normal visit

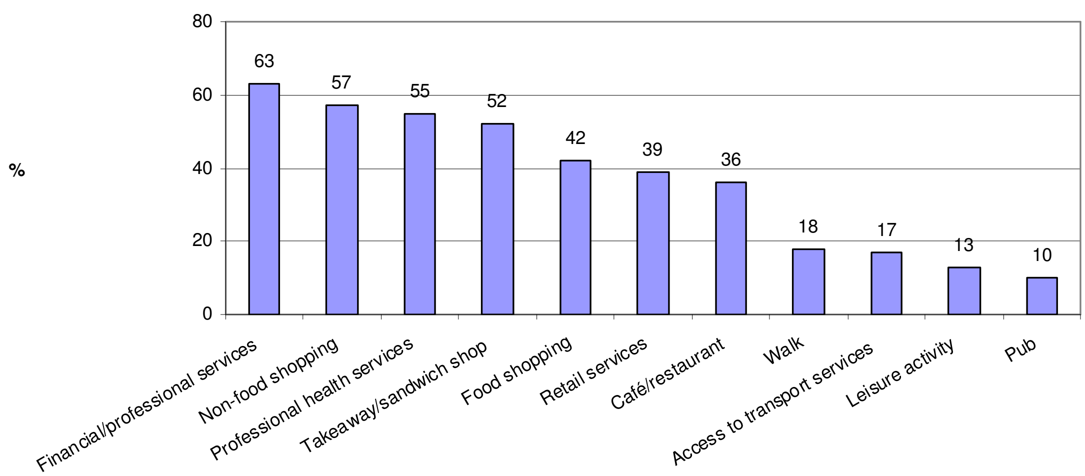
What is your MAIN reason for normally visiting this town centre? Base 75



7.4 Residents were then asked to select any **other purposes** for a normal visit and this generated a broader set of responses. The most common other purposes were: financial/professional services (63%), non-food shopping (57%), professional health services (55%), takeaway/sandwich shop (52%) and food shopping (42%).

Figure 7.4 Other purposes for normal visit

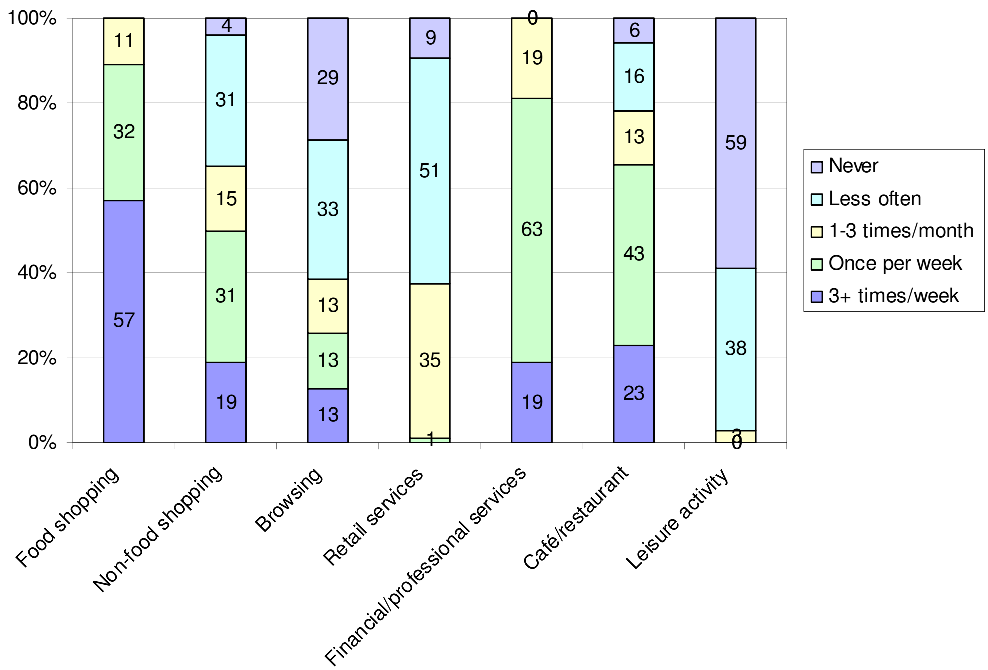
What OTHER reasons do you have for normally visiting this town centre? Base 73



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 frequency of food shopping was highest; 57% of respondents making at least 3 visits per week for food shopping. Highest for usage at least once a week were: professional/financial services (82%) and cafes/restaurants (66%).

Figure 7.5 Frequency of usage

How often do you normally visit this town centre during the day? Base 75



7.6 Figure 7.6 shows how frequency of resident visits to the town centre has changed over the last year. Usage is very stable, with 98% of respondents claiming no change in usage.

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: 73	
	%
More often	0
About the same	98
Less often	2

7.7 Around half (51%) walk to the town centre and 38% drive.

Table 7.7 Method of transport to travel to town centre

How do you normally travel to the town centre?

Base: 73	
	%
Walk	51
Car	38
Bus	8
Train	3

7.8 33% of residents normally spend less than 1 hour when visiting the town centre and a further 57% spend between 1-2 hours. 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?

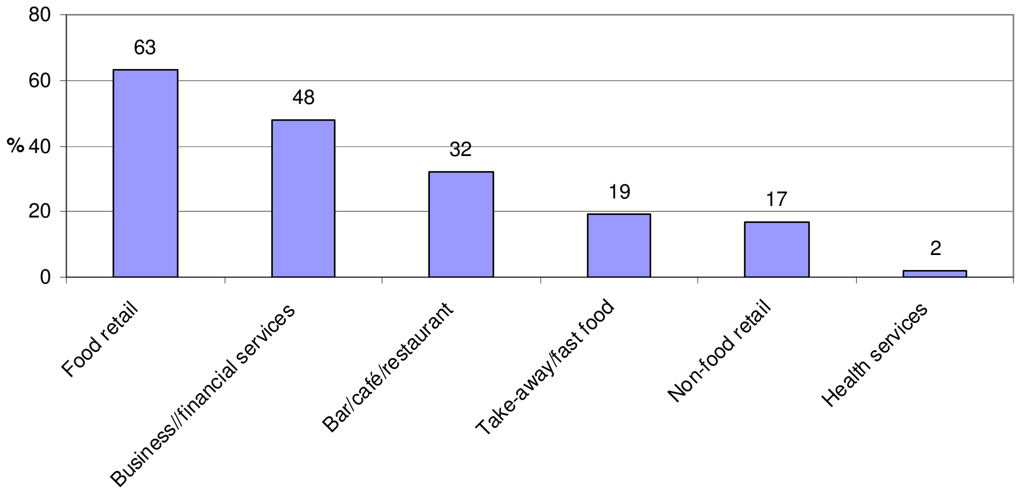
Base: 73	
	%
Less than 1 hour	33
1-2 hours	57
3-4 hours	9
5-6 hours	1
All day	0

Purchase behaviour

7.9 The types of shopping or services respondents used on their most recent visit to the town centre are shown in Figure 7.9. Most common were: food shopping (63%), business/financial services (48%) and bar/café/restaurant (32%).

Figure 7.9 Types of shopping of services used

What did you buy/what services did you use? Base 73



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 per shopping/service type has been calculated, based on those who gave an answer. Average spend on business/financial services was highest (£15.07) and the total average spend on residents' last visits was **£31.21.**

Table 7.10 Average spend on last occasion

Business and Financial Services	£15.07
Bar/Cafe/Restaurant	£3.25
Retail (non-food)	£2.11
Retail (food)	£9.54
Takeaway and Fast Food	£0.75
Health Services (e.g. dentist, opticians)	£0.00
Health and Beauty Services (e.g. hairdresser, nail salon)	£0.50
Total	**£31.21**

Reasons for usage of town centre

7.11 Table 7.11 shows the key reasons residents gave for using this town centre rather than somewhere else. This was asked as an open-ended question and respondent verbatim answers were coded into categories. The key category was that of convenience (92%). 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 do you use the shops/services in this town centre as opposed to using somewhere else?

Base: 70	
	%
Convenience generally	92
Support local shops/services	5
Positive to shops/service	4
Visit specific shop/service	4
Positive to people/friendly	1
Closeness to work	1

Table 7.11.1 Example of verbatim reasons for using town centre

Reasons to use	**Town Centre**
Convenience generally	*"I can walk down easily, it's near where I live"* *"It's handy for me, I work in Prestwick but I live here"* *"It's my local area, where I live"* *"It's within walking distance from my house"* *"Quickest when run out of something"* *"I can walk down in 10 mins"* *"Quicker and closer"*
Support local shops/services	*"It's where I live, I like to support local business"* *"Get what I need here, got to support local retailers"*

7.12 Residents were shown a list of reasons for visiting the town centre and asked to select **one main** reason for their last visit and then **other reasons**. The most common main reason was because it was the closest main shopping area (84%). Other reasons showed a wider range, although none was mentioned by more than 20% of residents: quality of shops/services (19%), quality of cafes/restaurants (18%), a specific shop/service (14%).

Table 7.12 Reasons to visit

What is your MAIN reason for using shops or services in this town centre?
What OTHER reasons for using shops or services in this town centre?

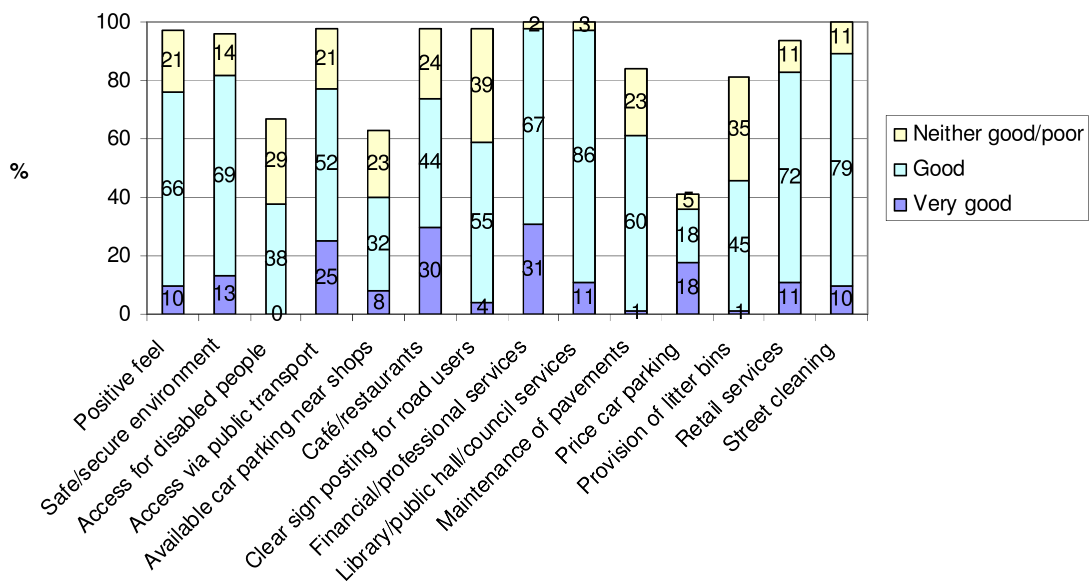
Base: 73	Main reason	Other reasons
	%	%
Closest main shopping centre	**84**	13
Positive feel to centre	9	12
Quality of café/restaurants	3	18
Quality of shops/services	2	19
Public transport	2	5
Attractive/well-maintained centre	0	1
Variety of shops/services	0	12
Specific shop/service	0	14
Good car parking	0	9

Attitudes and factors that would encourage usage

7.13 A list of features was shown and residents asked to rate each one as: very good, good, neither good nor poor, poor or very poor. Table 7.13 shows those statements which were generally rated positively (**very good or good).** Features most commonly rated as **very good** were: financial/professional services (31%), cafes/restaurants (30%) and access via public transport (25%). Features most commonly rated as **good** included: library/pubic halls/council facilities (86%), street cleaning (79%), retail services i.e. hair dresser, shoe repair (72%), safe/secure environment (69%) and positive feel (66%).

Table 7.13 Attitudes towards town centre

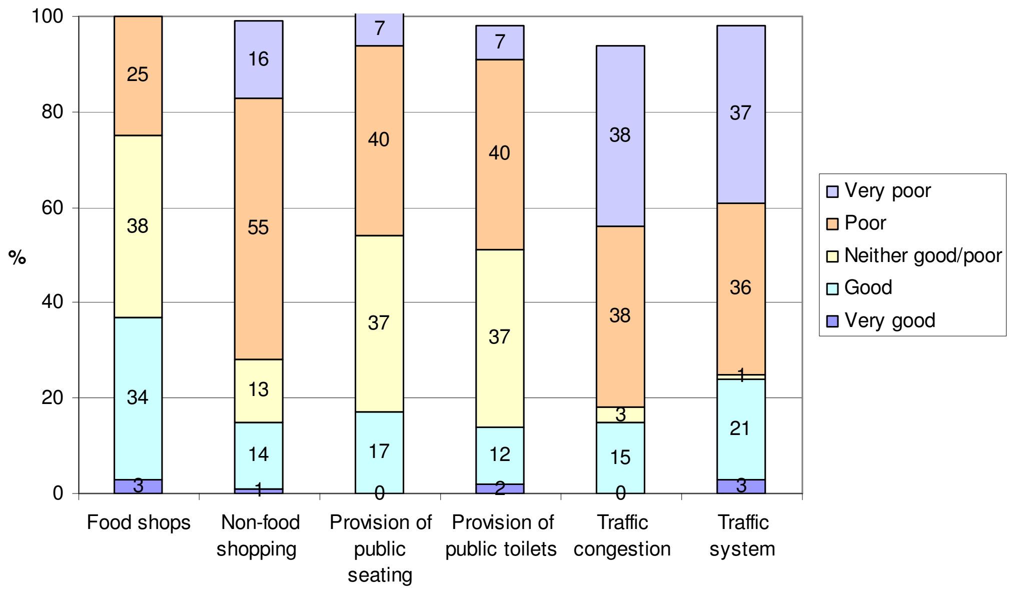
How do you rate this town centre with regard to the following? Base 73



7.14 Some features were rated as poor or very poor. Features most commonly rated as **very poor** included: traffic congestion (38%), traffic system (37%) and non-food shopping (16%). Features most commonly rated as **poor** included: non-food shopping (55%), provision of public toilets (40%), provision of public seating (40%).

Table 7.14 Attitudes towards town centre

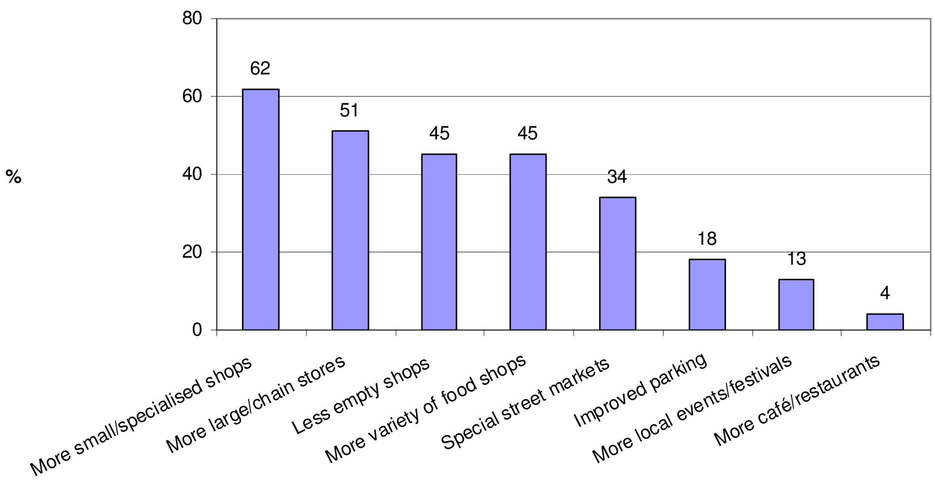
How do you rate this town centre with regard to the following? Base 73



7.15 Table 7.15 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/specialist shops (62%), more large/chain stores (51%), more variety of food stores (45%) and less empty shops (45%).

Table 7.15 Changes to attract more usage of town centre

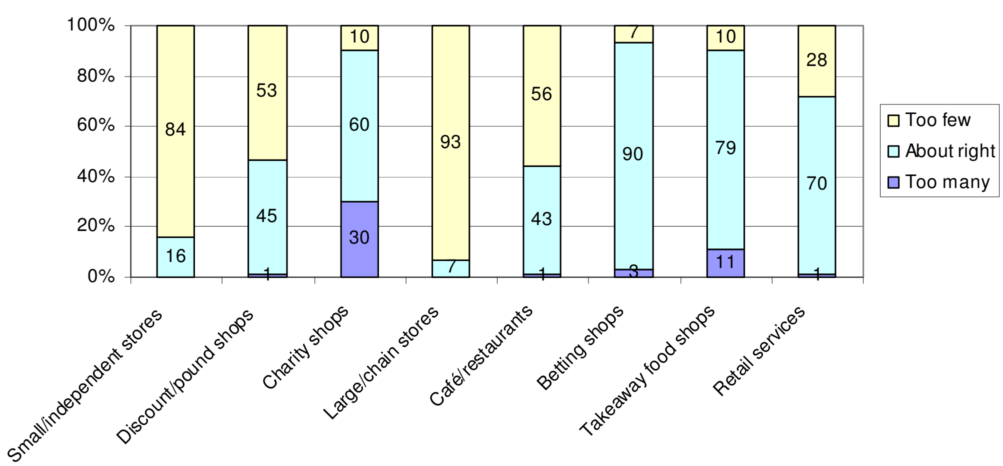
Which, if any, of these changes to shops/service would encourage you to use this town centre more? Base 73



7.16 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. There was a clear indication for more shops in town: 93% felt there were too few large/chain stores, 84% too few small/independent stores, 53% too few discount/pound shops and 56% too few café/restaurants.

Table 7.16 Attitudes towards types of outlets

What do you think about the number of these types of outlets in this town centre? Base 73



7.17 Table 7.17 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 (78%). A selection of verbatim comments is shown in Table 7.17.1 and full listing of comments can be found in the appendices.

Table 7.17 Improvements to shopping experience

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

Base: 69	%
Improvements to shops/services	78
Less traffic/improvements	39
Fill empty shops	16
Better/cheaper parking	5

Table 7.17.1 Example of verbatim reasons for improving town centre

Reasons to use	Town Centre
Improvements to shops/services	"Big supermarkets and shop selling clothes, shoes, toys" "Everything- more clothing, shoes and a freezer shop" "More clothes shops and food shops" "More shops, there is actual nothing here, you have to go into Ayr" "More shops, food, clothes basic needs and a decent restaurants" "More shops. There is only the co-op and it's very expensive, if you need anything you have to go to Ayr" "More beauty shops and baby shops"
Less traffic/improvements	"Do something about the road, it's really dangerous. Big lorries should be diverted somewhere else" "The big lorries cut though and the road it's too narrow" "We need a fly-over, the road is terrible, big lorries driving through too fast all time" "Do something about the road, it's very dangerous and trying to get along pavement with pram and small child is impossible, pavements too narrow"
Fill empty shops	"Fill empty shops as they bring town down" "Fill empty shops, give shops a paint" "Get all empty shops filled with independents, the empties maker it look run down"

Usage of different locations for shopping/services

7.18 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 Heathfield was the main location for food shopping (45%) and Ayr town centre for non-food shopping (62%). Maybole town centre was the primary location for financial services (76%) and retail services (51%).

Table 7.18 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 73

	Food	Non-food	Financial services	Retail services	Café/ restaurant
	%	%	%	%	%
Ayr, Heathfield	45	10	4	4	0
Ayr, Town Centre	15	62	7	34	45
Girvan Town Centre	12	5	2	2	3
Irvine Rivergate	0	3	0	0	3
Maybole Town Centre	**25**	**16**	**76**	**51**	**43**
Prestwick Town Centre	3	3	9	7	5
Glasgow City Centre	0	1	1	0	4
Other/Not answered	0	0	1	2	0

7.19 Residents were then asked to select any **other locations** for shopping and services and responses are shown in Table 7.19. Maybole town centre was the key other location for shopping (food 26% and non-food 20%) and Ayr town centre for financial services (23%),

Table 7.19 Other locations used for shopping and services

Which of these shopping areas are OTHER locations for each of these types of shopping or services? Base 73

	Food	Non-food	Financial services	Retail services	Café/ restaurant
	%	%	%	%	%
Ayr, Heathfield	20	10	7	0	4
Ayr, Town Centre	1	13	23	13	23
Girvan Town Centre	9	6	0	0	7
Irvine Rivergate	7	14	5	4	4
Kilmarnock Town Centre	9	25	6	2	24
Maybole Town Centre	26	20	6	17	19
Prestwick Town Centre	2	2	4	4	4
Glasgow City Centre	4	13	8	8	14
Silverburn	2	6	2	0	5

7.20 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. Closest shopping area and variety of shops/services were the key reasons for all types of shopping and services.

Table 7.20 Reasons to use main location for shopping and services

What are your reasons for using this location for this type of shopping/services? Base 73

	Food	Non-food	Financial service	Retail services	Café/ restaurant
	%	%	%	%	%
Closest main shopping area	33	27	90	60	50
Variety of shops and services	62	72	8	32	41
Quality of shops and services	16	18	4	15	11
Quality of cafes/restaurants	0	3	1	1	10

Evening usage of town centre

7.21 Of the 73 residents interviewed, only 8% visited the town centre facilities in the evening and 92% did not. Those who did not gave the following primary reasons: no need/don't go out 53% and prefer to go elsewhere 40%.

7.22 The base of shoppers who visit Maybole Town Centre in the evening is too low to show numerical analysis for the purposes and frequency of visiting town centre in the evening.

7.23 A list of features about the town centre in the evening was shown and shoppers asked to rate each one as: very good, good, neither good nor poor, poor or very poor. Statistical analysis cannot be conducted on the low base who answered this question.