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South Ayrshire Town Centre Assessment

Prestwick Town Centre: Shopper and Resident Surveys

November 2014

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European Union
European Regional
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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 Prestwick Shoppers and Residents surveys**. **The Business surveys and the South Ayrshire Residents survey are detailed in separate reports.**

Methodology

1.9 **Shopper Survey**: 150 face-to-face interviews were undertaken with shoppers in Prestwick Town Centre. Shoppers were randomly recruited at two locations: junction of Main Street/Station Road (Prestwick Cross) and junction of Main Street/Kyle Street.

1.10 **Residents Survey**: 127 face-to-face interviews were undertaken with residents within Prestwick town centre boundary and the landward villages of Symington and Monkton. 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 PRESTWICK CONCLUSIONS: SHOPPER AND RESIDENT

A proportion of shoppers are likely to be visitors to the area, mainly day visitors. Shoppers and residents are attracted by the variety and good quality of shops and services available in Prestwick town centre. In particular, the presence of food and non-food shops and financial/professional services are important.

A key main purpose of shoppers was usage of café/restaurants and these outlets were highly rated by residents and shoppers and provide an appealing presence in the town centre. Some residents visit the town centre for a walk or for browsing/window shopping and the variety of shops/services and the positive feel and attractive/well-maintained environment of the town centre support this purpose.

Prestwick town centre provides the main location for use of a variety of shops, services and cafes/restaurants by shoppers and residents. Ayr Heathfield and Ayr town centre are important support locations.

An important factor in the assessment and use of Prestwick town centre, by shoppers and residents, was the high rating received for having a positive feel and for being attractive and well-maintained. Specific public realm details such as good street lighting, well-maintained pavements and provision of litter bins add to this positive assessment. Additionally, residents highly rated the financial/professional services, retail services, access via public transport and library /public facilities.

Elements which were more poorly rated concerned traffic congestion/system and availability of parking near to shops. The provision of public toilets and of public seating also present opportunities for improvement. From the survey feedback, potential exists to increase usage of the town centre with the provision of more small/specialised stores and more discount/pound shops and also to review the current balance of the types of outlet in the town centre.

3.0 OVERALL SUMMARY: PRESTWICK SHOPPER AND RESIDENT

Shopper and resident profile

67% 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 42% 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 Prestwick town centre; however, 35% were visitors to the area.

Overall usage

The main purposes for visiting Prestwick town centre were the shops (food and non-food) and the service sectors (financial/professional services in particular). Residents are more likely to be using financial/professional services and non-food shopping as a **main** purpose for visiting and shoppers are more likely to be using café/restaurants. However, **other** purposes for visiting show usage by both samples of the wide variety of shops and services in Prestwick and, for residents, this includes use of professional health services (i.e. dentist, opticians), browsing/window shopping and going for a walk.

Frequency of usage of the town centre in the past year is stable for both shoppers and residents. Shoppers are more likely than residents to use a car (63% vs. 35%) and residents are more likely to walk into centre. The majority of shoppers and residents spend under 2 hours in the town centre.

Purchase behaviour

The **main** purchase or service types made by shoppers and residents are: business/financial services, food retail and bar/cafes/restaurants, again reflecting the variety of outlets in Prestwick. The average total spend by shoppers on the occasion of their visit was £53.87 and the average total spend for residents on their most recent visit was £51.56.

The key reason for using Prestwick shops/services was due to its location as the closest main shopping area; this was the case for shoppers and residents alike. Other reasons for usage included the positive feel to the town centre, the attractive and well-maintained environment and the variety and quality of the shops/services. Residents spontaneously commented on the people/friendliness of the town centre. *"Good feel to it especially the Main Street has all the types of shops I need and* like", "*Really feel Prestwick has retained its quality of shops", friendly people and good community spirit".*

Attitudes and factors that would increase usage

Prestwick town centre was commonly rated positively for a range of features by shoppers and residents. In particular: having a positive feel, a safe/secure environment and cafes/restaurants. In addition, residents highly rated the financial/professional services, access via public transport and library/public halls/council services.

Shoppers and residents rated the town centre less positively for traffic congestion, traffic system, availability of car parking near to shops and availability of public toilets; residents also gave a lower rating for availability of pubic seating.

The most popular changes to encourage increased usage of the town centre were: more small/specialised shops and improved parking: *"Use The Broadway as an Arts Centre like Harbour Arts in Irvine", "Stop HGVs coming along the Main street", "Need a TK Max or Matalan", "Less charity shops, need more clothes shops".* There were felt to be too few small/independent stores, too few large/chain stores, too few discount/pound shops and too many charity shops.

Usage of different locations for shopping/services

The primary location used by residents and shoppers for services and for cafes/restaurants was Prestwick town centre. There was a difference between the surveys in the primary location used for food shopping: shoppers were most likely to mainly use Prestwick town centre (37%) and residents were most likely to use Ayr, Heathfield (66%). Ayr town centre is a support location for both samples, specifically for financial and retail services and for cafes/restaurants.

Prestwick being the closest main shopping area is a key reason for usage, particularly for shoppers and variety of shops/services was also a factor. For residents, the availability of car parking was a key reason for choice of location for food shopping (72%) and variety of shops/services for non-food shopping (71%).

Evening usage of town centre

45% of shoppers and 59% of residents visit Prestwick town centre in the evening. Around 80% of both samples are visiting cafes/restaurants and shoppers are more likely to visit bars/pubs/nightclubs than residents (84% and 61% respectively).

Most features of the town centre in the evening were rated positively, including good café/restaurants, good bars/pubs/nightclubs, good street lighting, safe/secure environment, positive feel, access via public transport and attractive/well-maintained environment. A small proportion of each survey rated available car parking as poor/very poor (36% of residents and 20% of shoppers).

4.0 PRESTWICK SHOPPER SUMMARY

Shopper profile

There was a female skew to the shopper profile, with 67% of respondents being female and 33% male. Shoppers were from a range of age groups, with 42% over the age of 55. The occupational status of the head of household was mainly working (65%) and 29% were retired.

The majority of shoppers lived locally or worked in the town centre. However 35% 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 food shopping (29%) but **other** reasons included use of a café/restaurant (39%) or financial/professional services (32%). Over one-third of shoppers (37%) visit food shops at least three times a week and 42% visit non-food shops at least once a week and 30% use financial/professional services at least once a week.

Frequency of usage of the town centre has been stable in the past year (83% saying that the frequency of their usage has not changed) and the majority of shoppers (63%) used a car to travel to the town centre. 62% of shoppers intended to spend under 2 hours in the town centre on this occasion.

Purchase behaviour

The main purchase made or service used included bar/cafes/restaurants, business/financial services and food shops, reflecting the variety of outlets available. 60% of shoppers purchased in bars/cafes/restaurants with an average spend of £12.31; 49% purchased from food shops with an average spend of £14.81. The total average spend in Prestwick town centre on the occasion of the visit was £53.87.

The **main** prompted reasons for shopping in Prestwick were the convenience of it being the closest main shopping area (47%) and quality of cafés/restaurants (21%). **Other** reasons given by shoppers included the variety of shops/services (52%), the quality of shops/services (53%), the positive feel to town centre (29%) and the attractive/well-maintained town centre (35%). Spontaneous positive comments included: *"Nearest to me and has a good range of diverse types of shops", "Good feel to it especially the Main Street has all the types of shops I need and* like", "*Really feel Prestwick has retained it's quality of shops"*

Attitudes and factors that would increase usage

Prestwick town centre was rated as **very good** for: cafes/restaurants (59%), having a positive feel (50%), a safe/secure environment (28%) and financial/professional services (28%). It was also positively rated for public realm features such as maintenance of pavements, street cleaning and provision of litter bins.

Some features were more commonly rated as **poor/very poor**: traffic congestion (46%), the traffic system (43%), availability of parking near shops (33%) and provision of public toilets (48%).

The most popular suggested changes which would encourage increased use of the town centre were: more small/specialised shops (63%) and improved parking facilities (49%). When asked about the balance of types of shops, 60% felt there were too few small/independent stores, 53% too few discount/pounds shops and 32% felt there were too many charity shops.

The key spontaneous category for improvement to their shopping experience was better/cheaper parking (63%): *"Better car parking with more on-street parking" "Car parking signs highlighted", "More parking provided especially beside the main shops".*

Usage of different locations for shopping/services

The **main** location used for different types of shopping or services was Prestwick town centre; Ayr town centre was also used as an **other** location for café/restaurants (49%), financial services (40%) and non-food shopping (37%) and Ayr Heathfield for food shopping (37%). Closeness of main shopping area was the key reason for usage as a main location, a good variety of shops/service was a factor for shopping and quality of shops/services was important for café/restaurants.

Evening usage of town centre

45% of shoppers visited the town centre in the evening and, of these, over 80% visited pub/bar/nightclubs and café/restaurants respectively. Weekly usage is 30% for pub/bar/nightclubs and 20% for café/restaurants.

Features of the town centre in the evening were generally rated positively. In particular: **very good** for good bars/pubs/nightclubs (76%) and good café/restaurants (75%). A small proportion rated some features as **poor/very poor** – available car parking (20%) and access via public transport (12%) - but these were generally rated as good.

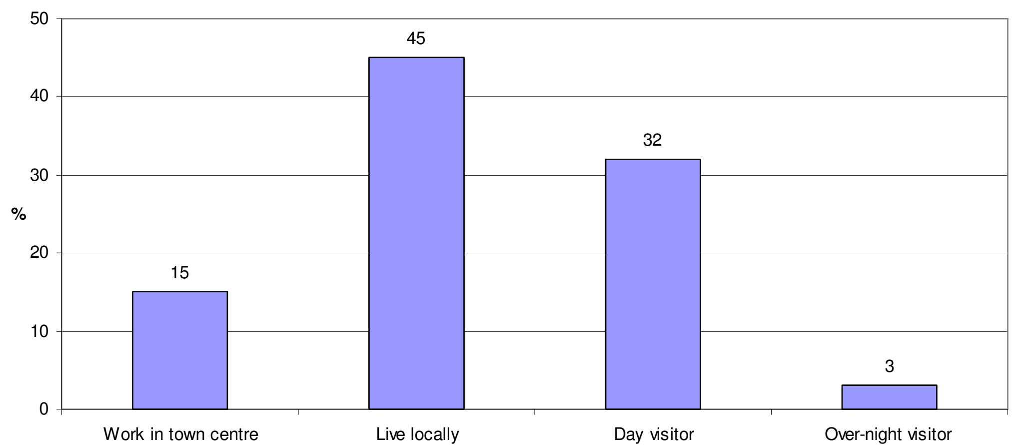
5.0 PRESTWICK SHOPPER KEY FINDINGS: TOWN CENTRE

Shopper profile

5.1 Shoppers were shown a list of types of visitor to the town centre and asked to select one which best described themselves. 60% either lived locally or worked in the town centre and 35% were visitors to the area. Further detailed analysis of the data shows that 29% of visitors live outside South Ayrshire, including 2% from outside Scotland. In the following analysis of this survey, it is important to note that 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

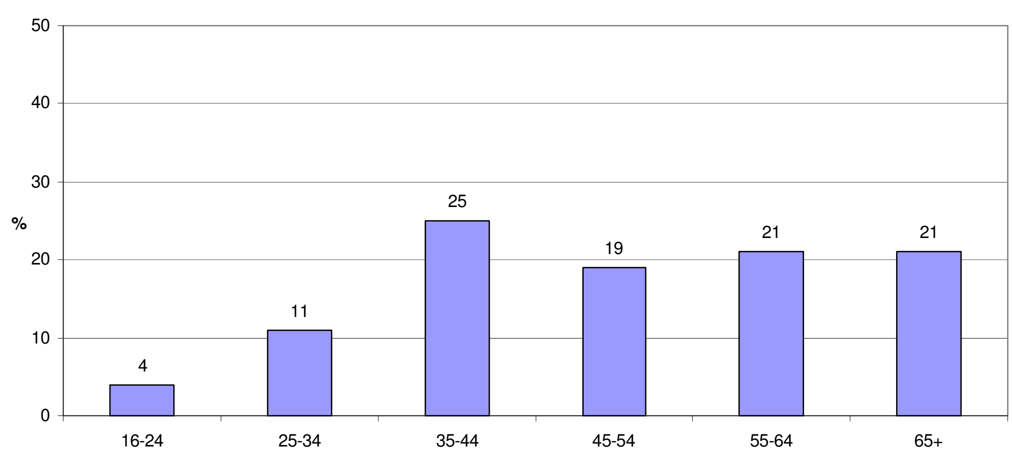
Which type of visitor to this town centre best describes you today? Base 150



5.2 There was a female skew to the shopper profile, with 67% female and 33% male. The age group profile of visitors is shown in Figure 5.2: 42% of shoppers were aged 55+.

Figure 5.2 Age of visitor to town centre

Into which of these age bands do you fall? Base 150

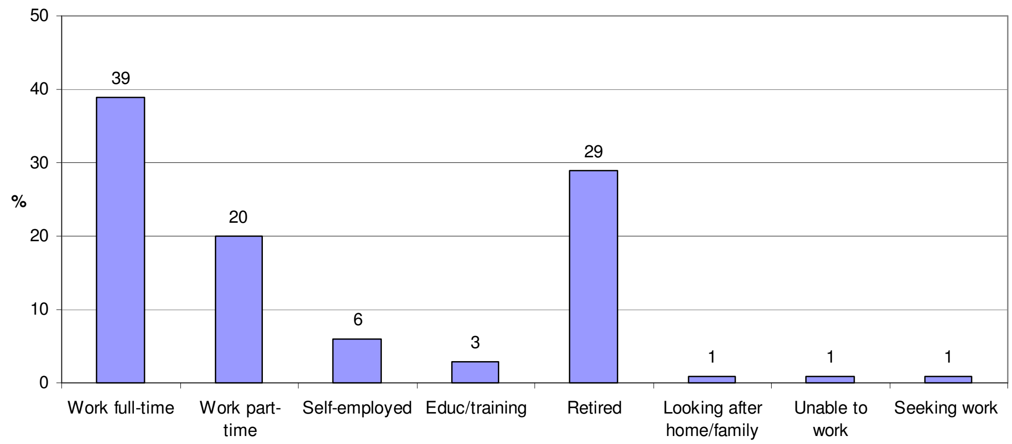


5.3 Analysis of the occupational status of the head of household for shoppers shows that the majority were working: 39% were working full time, 20% part-time and 6% self-employed. 29% of the household heads were retired.

Figure 5.3 Occupational status of head of household

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

Base 150

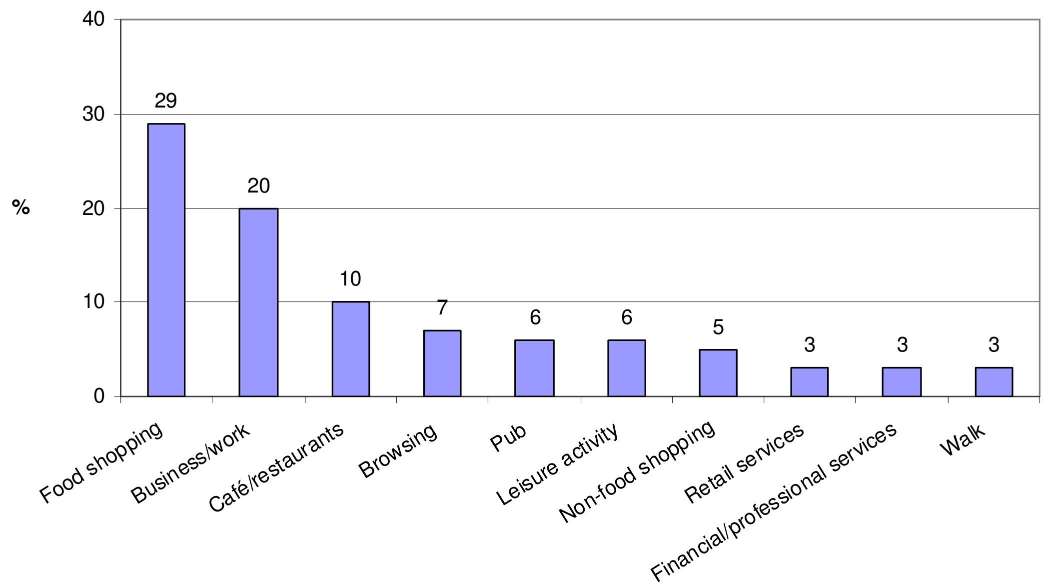


Overall usage

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 (29%) was the highest main purpose, followed by business/work (19%) and café/restaurants (10%). Use of services as a main purpose was low: retail services e.g. hairdresser, shoe repair (3%) and financial/professional services e.g. bank, solicitor (3%).

Figure 5.4 Main purpose for visit

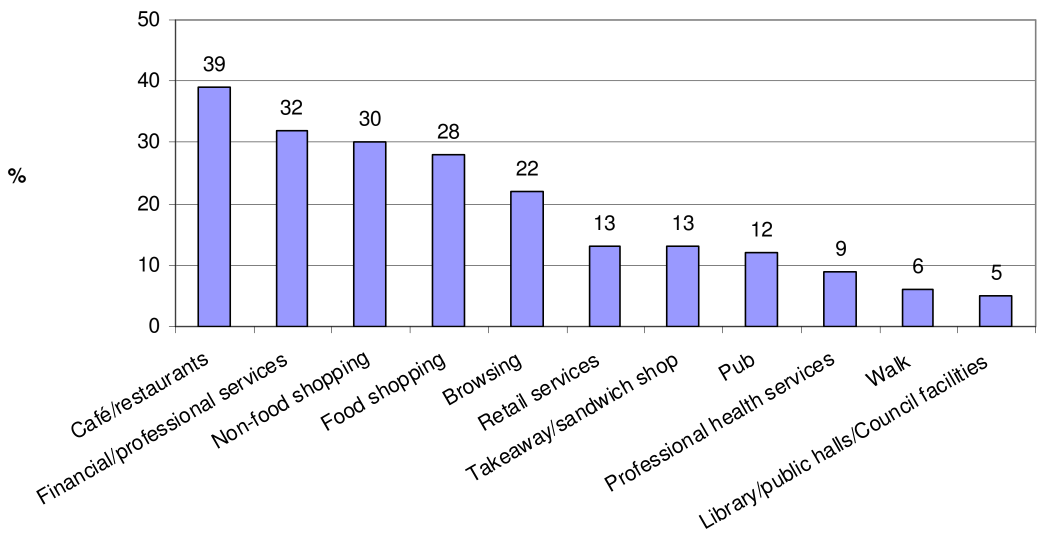
What is your MAIN reason for visiting this town centre today? Base 150



5.5 Shoppers were then asked to select any **other purposes** for their current visit. This generated a broader set of responses. In particular: café/restaurants (39%), financial/professional services (32%), non-food shopping (30%), food shopping (28%) and browsing/window shopping (22%).

Figure 5.5 Other purposes for visit

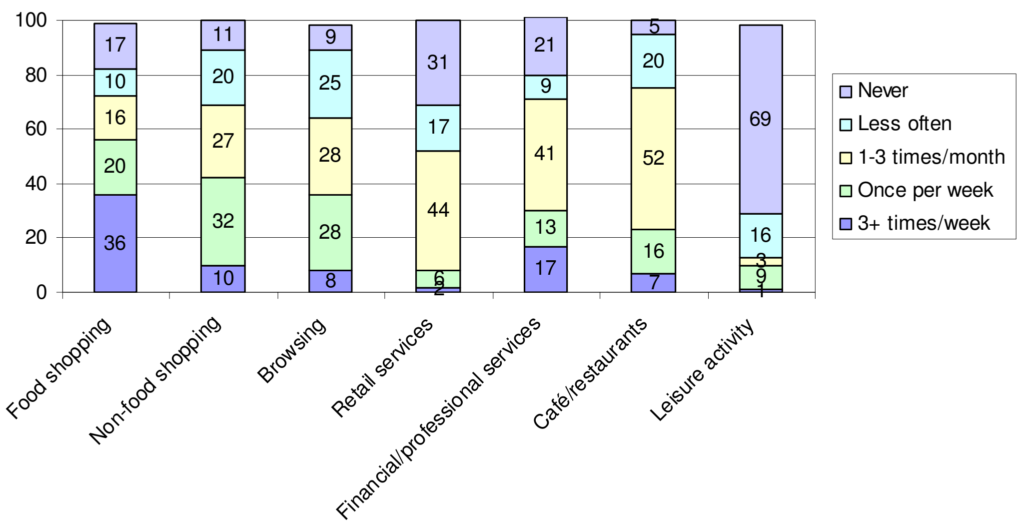
What OTHER reasons do you have for visiting this town centre today? Base 150



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. Food shopping was the most frequent purpose - 37% at least 3 times per week. Most common usage at least once a week was: non-food shopping (42%), browsing (36%)[1] and financial/professional services (30%). Usage at least once a month was 38% for retail services (e.g. hairdresser, shoe repair) and 75% for café/restaurants.

Figure 5.6 Frequency of usage[2]

How often do you visit this town centre during the day? Base 150



5.7 Figure 5.7 shows how the frequency of shopper visits to town centre has changed over the last year. The majority (83%) are using the centre about the same frequency as last year, reflecting stability in usage. The main driver for increased usage was personal circumstances i.e. change in work or family situation. A full list of reason for change in usage is contained in 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: 150	
	%
More often	13
About the same	83
Less often	4

[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 63% of shoppers used a car to travel to the town centre on this occasion; a total of 22% 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: 150	
	%
Car	63
Bus	19
Walk	13
Train	3
Cycle	2

5.9 Table 5.9 shows that nearly a fifth of shoppers (19%) were planning to spend less than 1 hour in the town centre and 43% of shoppers 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?

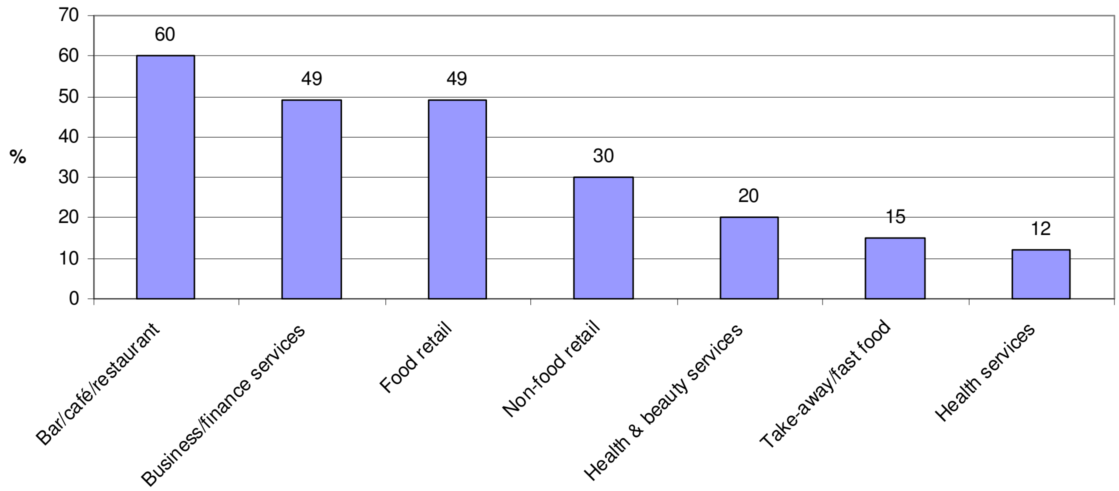
Base: 150	
	%
Less than 1 hour	19
1-2 hours	43
3-4 hours	36
5-6 hours	0
All day	1

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: café/bar/restaurant (60%), business/financial services i.e. bank, estate agent (49%) and food shops (49%).

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 150



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 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. Food/drink – either retail (£14.81) or on-premise (£12.31) had the highest average spend. The total average spend in the town centre on this occasion was £53.87.

Table 5.11 Average spend on this occasion

Business and Financial Services	**£7.74**
Bar/Cafe/Restaurant	**£12.31**
Retail (non-food)	**£6.64**
Retail (food)	**£14.81**
Takeaway and Fast Food	**£2.97**
Health Services (e.g. dentist, opticians)	**£3.03**
Health and Beauty Services (e.g. hairdresser, nail salon)	**£5.24**
Total	**£53.87**

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 (39%) followed by positive comments regarding the shops/services (29%). 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: 123	
	%
Convenience generally	39
Positive to shops/service	29
General positive aspects	16
Holiday/day trip	13
Closeness to work	13
Specific shops/service	6
Friends/family	5

Table 5.12.1 Example of verbatim reasons for using town centre

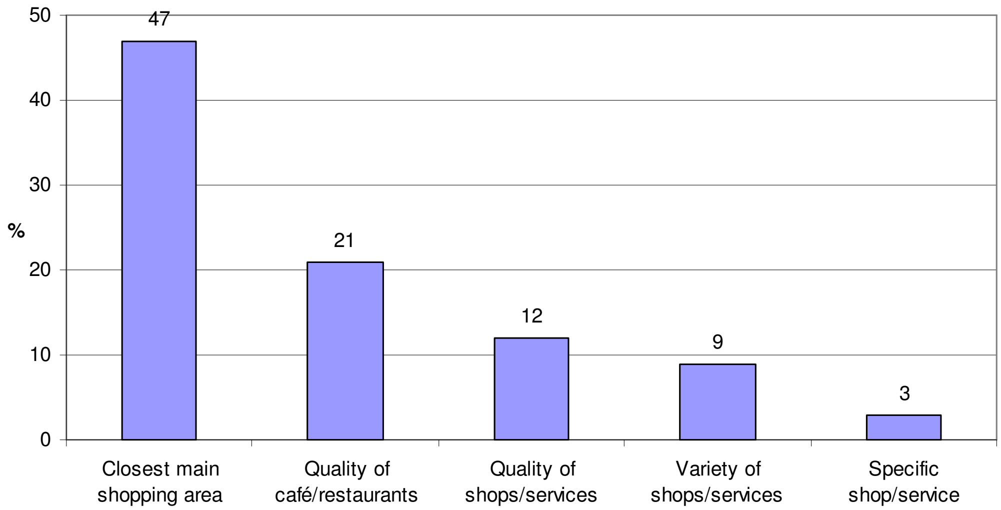
Reasons to use	**Town Centre**
Convenience generally	*"Extremely handy for me for work and my house"; "On my doorstep and handy to use have all the things I need to get"; "Nearest to me and has a good range of diverse types of shops".*
Positive to shops/services	*"Good feel to it especially the Main Street"; Has all the types of shops I need and like"; "Like the range of shops and like the shops"; " I use because they provide good service and goods"; "It's a good mixture of shops"; "Nice cafes, friendly"*
General positive aspects	*"Really feel Prestwick has retained its quality of shops and it's very handy for me"; "Like the size of town centre, nice to walk and browse"; "Like Prestwick for day out with daughter and go for lunch"; "Has a better range and quality of shops than Ayr now"; "Like the feel of the place and inclined to like it better than Kilmarnock where I stay".*

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. Proximity to a main shopping area was a key reason to visit (47%); other factors were quality of café/restaurants (21%) and quality of shops/services (12%).

Figure 5.13 Main reason for visit

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

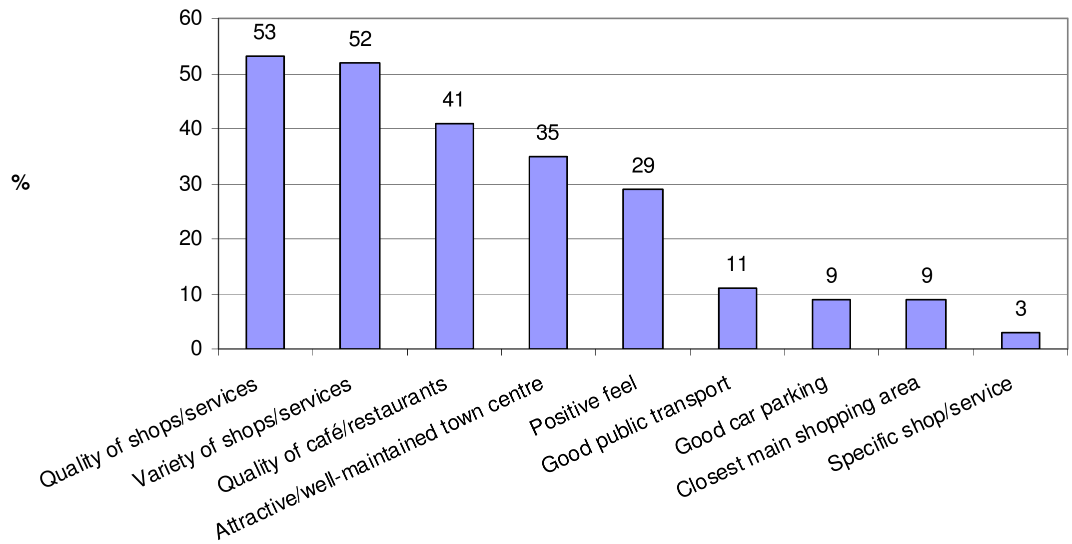
Base 150



5.14 Shoppers were then asked to select any **other reasons** for their current visit. Again the quality of shops/services was important (53%) but also the variety of shops/services (52%), quality of café/restaurants (41%), the attractive/well-maintained town centre (35%) and the positive feel to the town centre (29%).

Figure 5.14 Other reasons for visit

What OTHER reasons do you have for using shops or services in this town centre today? Base 150

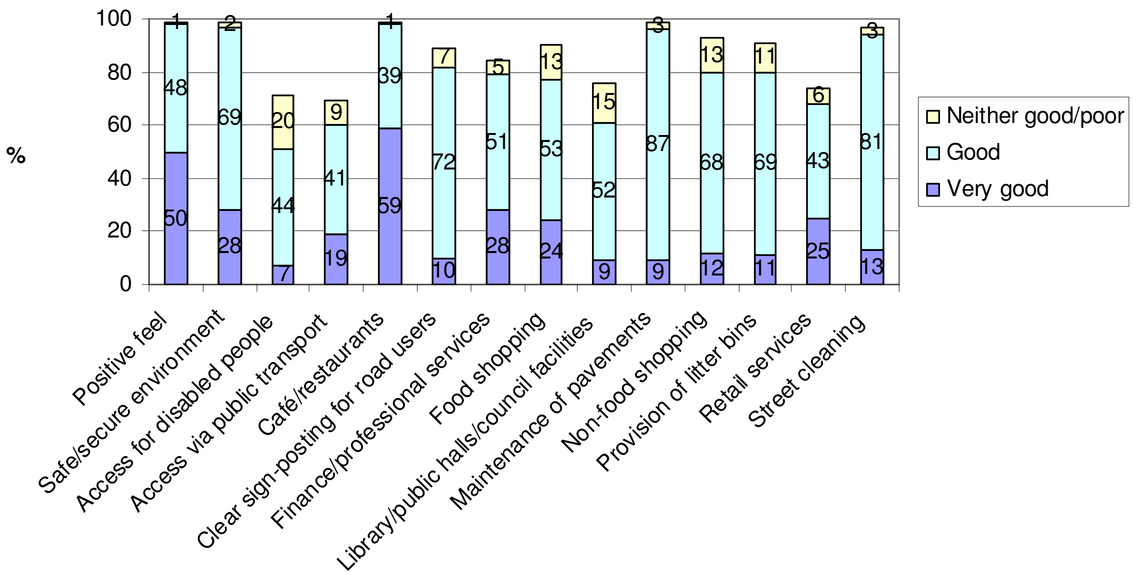


Attitudes and factors that would encourage usage

5.15 A list of features about the town centre was shown and shoppers asked to rate each one as: very good, good, neither good nor poor, poor or very poor. Table 5.15 shows those statements which were generally rated positively (**very good or good).** In particular, cafes/restaurants (59%), a positive feel (50%), a safe/secure environment (28%) and financial/professional services (28%) were commonly rated as **very good**. Other features which were commonly rated as **good** included public realm features: maintenance of pavements (87%), street cleaning (81%), clear sign-posting for road users (72%), provision of litter bins (69%) and non-food shopping (68%).

Figure 5.15 Attitudes towards town centre

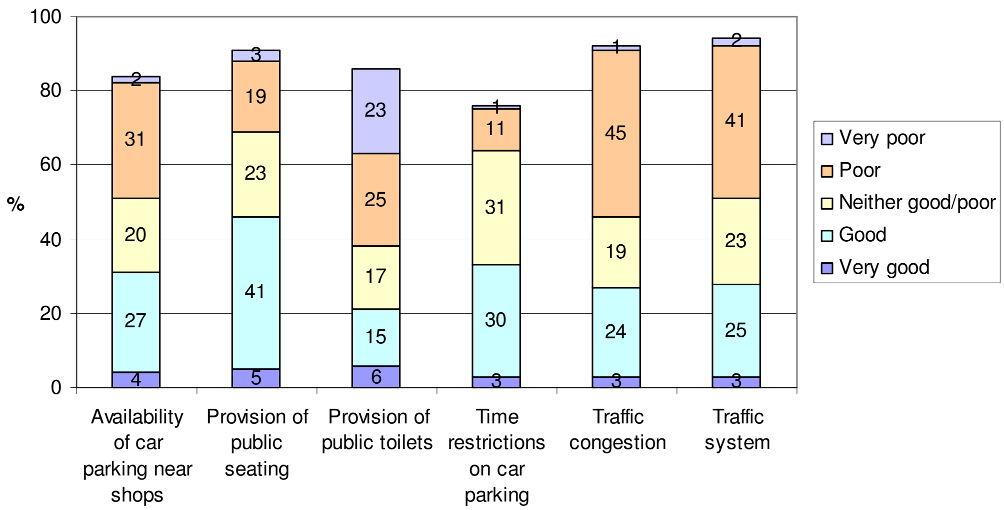
How do you rate this town centre with regard to the following? Base 150



5.16 Some features were rated highest for being **poor or very poor**. In particular, those relating to traffic congestion (46%) and traffic system (43%), although around one-quarter of shoppers rated these features as good. Also commonly rated as **poor/very poor** were: availability of parking near shops (33%) and provision of public toilets (48%) - which comprised the highest score for very poor (23%)

Figure 5.16 Attitudes towards town centre

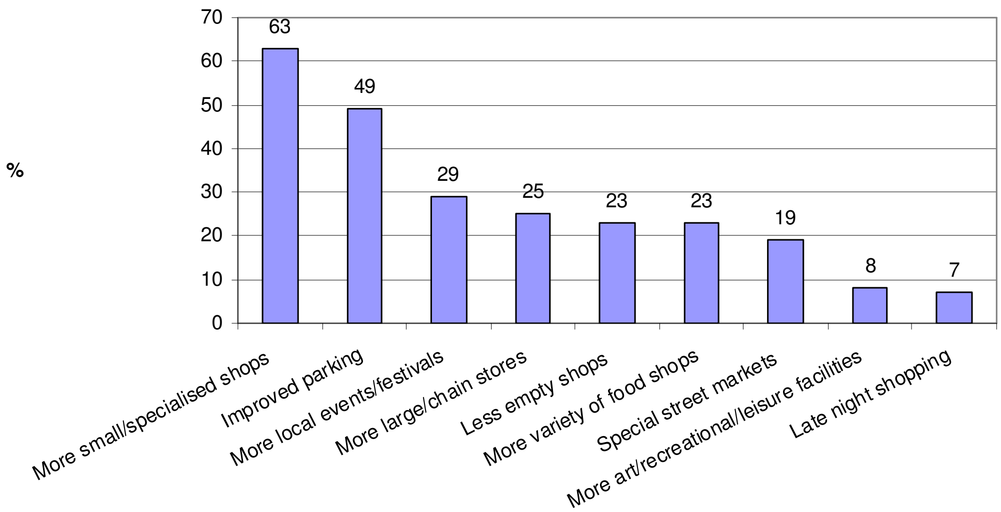
How do you rate this town centre with regard to the following? Base 150



5.17 Table 5.17 shows the changes to the town centre which would encourage shoppers to use the town centre more often; shoppers provided up to three changes from a list and the most common are detailed below. The most popular changes suggested were for more small/specialised shops (63%), improved parking (49%) and more local events/festivals (29%).

Figure 5.17 Changes to attract more usage of town centre

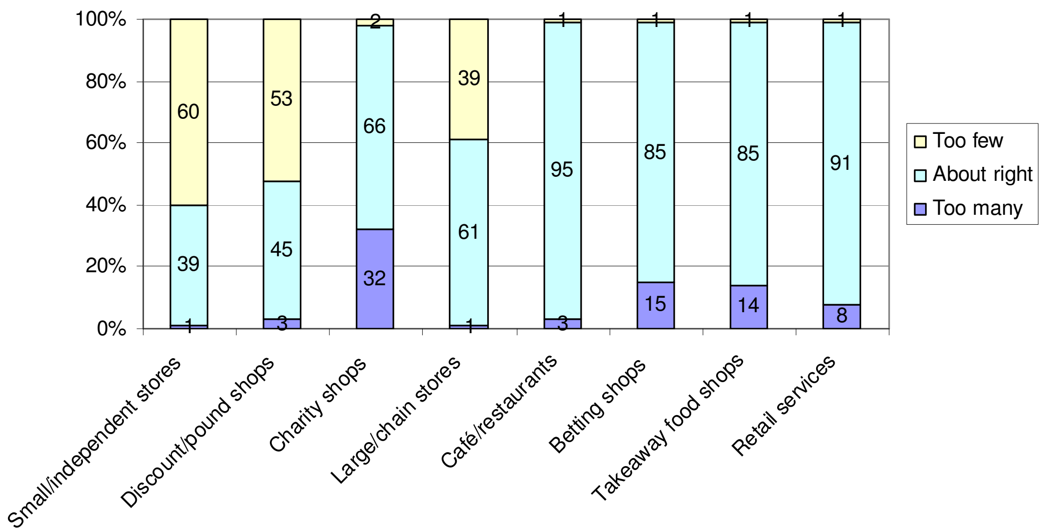
Which, if any, of these changes to shops/services would encourage you to use this town centre more? Base 150



5.18 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. Generally the balance was about right, although 60% felt there were **too few** small/independent stores and 53% **too few** discount/pound shops. Nearly one third (32%) indicated there were **too many** charity shops.

Figure 5.18 Attitudes towards types of outlets

What do you think about the number of these types of outlets in this town centre?
Base 150



5.19 Table 5.19 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 parking (63%). A selection of verbatim comments is shown in Table 5.19.1 and full listing of comments can be found in the appendices.

Table 5.19 Improvements to shopping experience

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

Base: 109	
	%
Better/cheaper parking	63
Improvements to shops/services	33
Less traffic/traffic improvements	5
Fill empty shops	2

Table 5.19.1 Example of verbatim reasons for improving town centre

Reasons to use	Town Centre
Better/cheaper parking	*"Better car parking with more on street parking"; "Better to get on street parking, get it sorted out"; "Car parking signs highlighted"; "Give us a better car parking system, more parking spaces"; "More parking provided especially beside the main shops"*
Improvements to shops/services	*"A wider range of shops, especially food shops, maybe a wider spread of quality shops"; "Farmers and xmas markets"; "More brand name shops"; "More clothing, shoe shops;" "Large clothes shop"*

Usage of different locations for shopping/services

5.20 Shoppers were shown a list of locations for different types of shopping and services and asked to select their **one main** location for each. Prestwick town centre was the primary location used overall, with a smaller proportion (17%) using Ayr, Heathfield for food shopping and 19% using Ayr town centre for non-food shopping.

Table 5.20 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 150

	Food	Non-food	Financial services	Retail services	Café/ restaurant
	%	%	%	%	%
Ayr, Heathfield	17	13	2	2	1
Ayr, Town Centre	10	19	15	15	15
Irvine Rivergate/Town	5	5	4	3	3
Kilmarnock Town Centre	14	15	14	14	14
Prestwick Town Centre	**37**	**30**	**49**	**47**	**49**
Troon Town Centre	3	2	3	3	3
Silverburn	3	5	0	0	1
Glasgow City Centre	1	3	3	3	6
Other/Not answered	12	8	10	13	8

5.21 Shoppers were then asked to select any **other locations** for shopping and services. Ayr town centre was a key other location for: café/restaurants (49%), financial services (40%), non-food shopping (37%) and retail services (33%). Ayr, Heathfield was the highest other location for food shopping (37%). Glasgow city centre was used by 24% of respondents for non-food shopping and Silverburn by 25%.

Table 5.21 Other locations used for shopping and services

Which OTHER shopping areas do you use for each of these types of shopping or services? Base 150

	Food	Non-food	Financial services	Retail services	Café/ restaurant
	%	%	%	%	%
Ayr, Heathfield	37	26	3	2	2
Ayr, Town Centre	19	37	40	33	49
Irvine Rivergate/Town	7	8	4	4	4
Kilmarnock Town Centre	6	11	4	3	5
Prestwick Town Centre	22	27	23	17	27
Troon Town Centre	6	3	4	5	11
Silverburn	3	25	2	0	9
Glasgow City Centre	8	24	17	9	26

5.22 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 main shopping area was a key reason for use. For food and non-food shopping, a variety of shops/services (31% and 38% respectively). Quality of shops/services and quality of café/restaurants was also a factor

Table 5.22 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	82	69	53	49	45
Variety of shops and services	31	38	15	24	16
Quality of shops and services	21	26	19	28	21
Quality of café/restaurant	3	3	4	5	51
Good car parking	20	20	10	9	7
Good public transport	6	5	5	5	5
Attractive/well-maintained	5	3	3	2	5
Positive feel to environment	2	5	5	3	4

Evening usage of town centre

5.23 Of the 150 shoppers interviewed, 45% visited the town centre in the evening and 54% did not. Those who did not most commonly gave the following reasons: no need/ don't go out 65% and prefer to go elsewhere 43%.

5.24 The popularity of the town centre for evening eating and drinking is shown, with over 84% visiting for pub/bar/night club and 82% for café/restaurants.

Table 5.24 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	**68**
	%
Pub/bar/nightclub	84
Café/restaurant	82
Takeaway	49
Food shop	43
Sports, gym, health and fitness	6

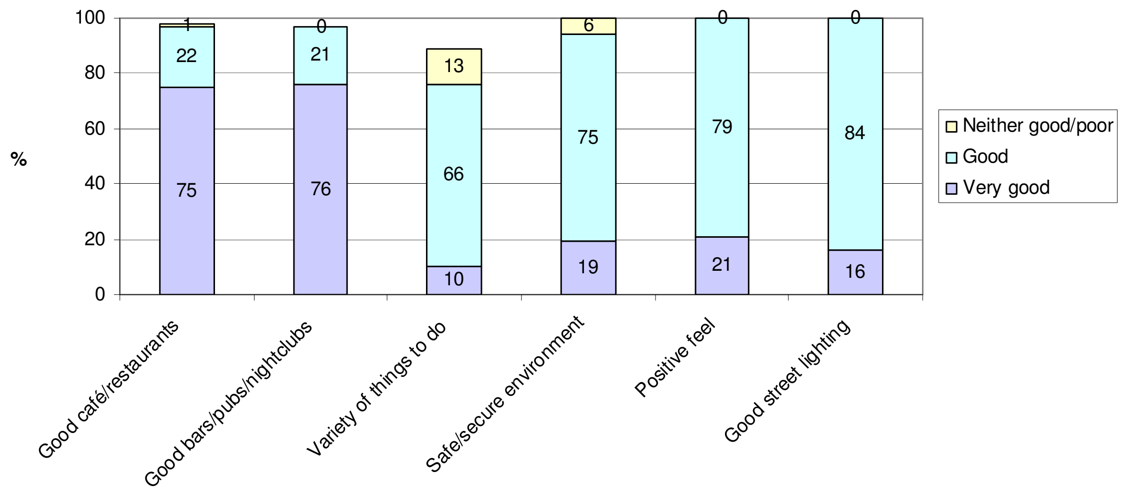
5.25 Venues visited at least once a week in the evening were: pub/bar/nightclubs (30%), café/restaurants (20%) and food shopping (35%).

Figure 5.26 Frequency of using town centre in evening
How often do you go into this town centre in the evening for these things?
Base: 68 respondents

5.26 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 5.26 shows those features which were generally rated positively (very good or good). In particular, good café/restaurants (75%) and good bar/pubs/nightclubs (76%) were commonly rated as **very good**. Those features commonly rated as **good** were: good street lighting (84%), a positive feel (79%) and safe/secure environment (75%).

Table 5.26 Attitudes towards town centre in evening

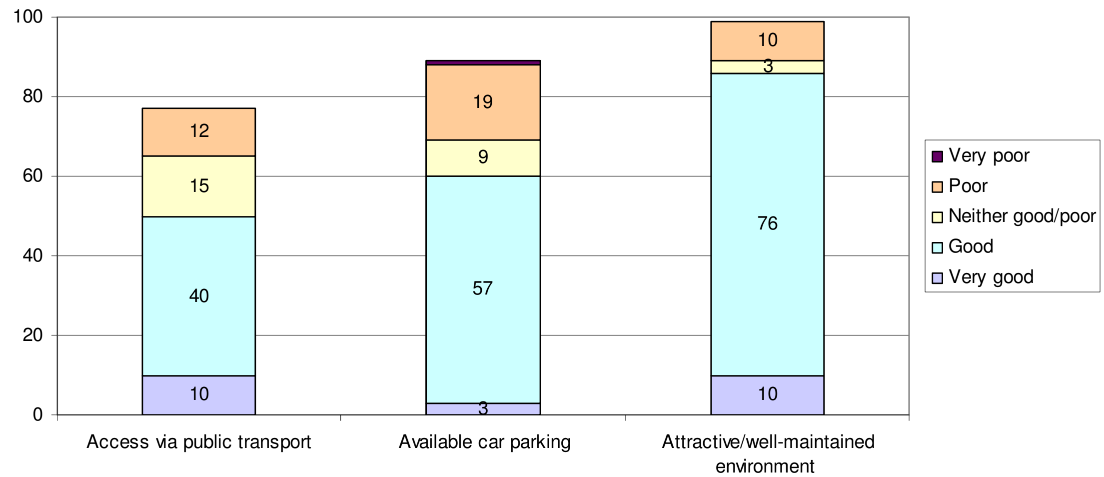
When you visit this town centre in the evening, how do you rate it with regard to these? Base: 68 respondents



5.27 Only 3 features were rated over 10% for being **poor/very poor**: available car-parking (20%), access via public transport (12%) and attractive/well-maintained environment (10%). It should be noted that these features were commonly rated as being good/very good.

Table 5.27 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: 68 respondents



6.0 PRESTWICK 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 47% aged 55+. The occupational status of the head of household was mainly working (51%) and 33% were retired.

Overall usage

The key **main** purposes for visiting Ayr town centre were: use of financial/professional services (22%) and non-food shopping (19%). **Other** purposes most commonly cited included: food shopping (61%), non-food shopping (54%), professional health services (52%) and financial/professional services (32%). Residents are making regular visits to the town centre: about one-third of residents visit at least three times a week for food shopping (35%) and non-food shopping (33%) and 57% visit the town at least once a week to browse/window shop. The financial/professional service sector is used at least once a week by 43% of residents.

Frequency of usage of the town centre has been fairly stable in the past year, with 76% of residents claiming no change in usage frequency. Nearly half (43%) of residents normally walk to the town centre and 35% use a car. The majority (81%) generally spend under 2 hours in the town centre, 25% less than one hour.

Purchase behaviour

The main purchases made or services used at residents' last visit to the town centre were business/financial services (45%), food shops (37%) and bar/café/restaurants (32%), reflecting the wide variety of outlets available. The total average spend in Prestwick town centre on residents' most recent visit was £51.56, with the highest average spend being on non-food retail (£12.81).

The key **main** reason for residents visiting Prestwick was the convenience of it being the closest main shopping area (78%); residents also made positive comments on the shops/services and on the people/friendliness: "*Most of what you need can be got in Town centre, "Handy for everyday things", "nice people and I like the feel of it", "great community spirit".*

These comments are supported by prompted **other** reasons for visiting Prestwick: positive feel (71%), attractive and well-maintained town centre (66%) and the quality of the shops/services (62%).

Attitudes and factors that would increase usage

The features in Prestwick town centre that were most commonly rated as **very good** were: a positive feel (38%) and a safe/secure environment (33%). Also rated as **good** were: presence of financial/professional services (90%), cafes/restaurants (82%) and library/public hall/Council services (82%).

The town centre was rated most commonly as **very poor** for: provision of public toilets (57%), availability of public seating (34%) and availability of car parking near to shops (33%). Also rated as **poor/very poor** were: traffic congestion (74%) and the traffic system (61%).

The most popular changes which would encourage increased use of the town centre were more small/specialised shops (66%) and improved parking facilities (60%). Residents felt there were too few large/chain stores (44%), small/ independent stores (36%) and discount/pound shops (35%). Nearly half (47%) felt there were too many charity shops.

The highest spontaneous category for improving shopping experience was improvements to shops/services (57%): *"Have a Clarks shoe shop", "Would like a Pizzeria", "Use Broadway Centre as an Arts Centre like Harbour Arts in Irvine", "Stop HGV coming along the Main street", "Need a TK Max or Matalan", "Less charity shops, need more clothes shops".*

Usage of different locations for shopping/services

The **main** location used for different types of services was Prestwick town centre: it was the main location used for financial services 82%, retail services 78% and café/restaurants 83%. Ayr was the main location for shopping: food shopping at Heathfield (66%) and non-food shopping at Heathfield and Ayr town centre. Analysis of the **other l**ocations used for shops and services shows that Ayr town centre is a support location for use of financial and retail services and also for cafes/restaurants.

Good car parking was a key reason (72%) to select a main location for food shopping and the variety of shops/service for non-food shopping (71%).

Evening usage of town centre

59% of residents visited the town centre in the evening and, of these, 76% are visiting café/restaurants and 61% pubs/bars/nightclubs. Usage at least once a week was 23% for pubs/bars/nightclubs and 22% for café/restaurants.

Most features of the town centre in the evening were rated positively. Those most commonly rated as very good/good included: good café/restaurants, good bars/pubs/nightclubs, good street lighting, safe/secure environment, positive feel, good public transport and attractive/well-maintained town centre. A small proportion (36%) rated available car parking as poor/very poor.

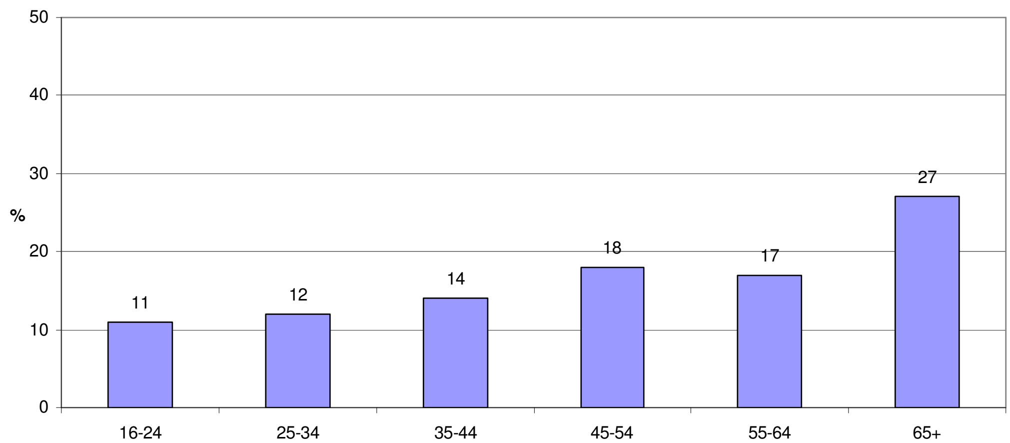
7.0 PRESTWICK RESIDENT KEY FINDINGS: TOWN CENTRE

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 respondents were female and 47% were male and the age group profile of residents is shown in Figure 7.1, 44% of Prestwick residents in the survey were aged 55+.

Figure 7.1 Age of resident

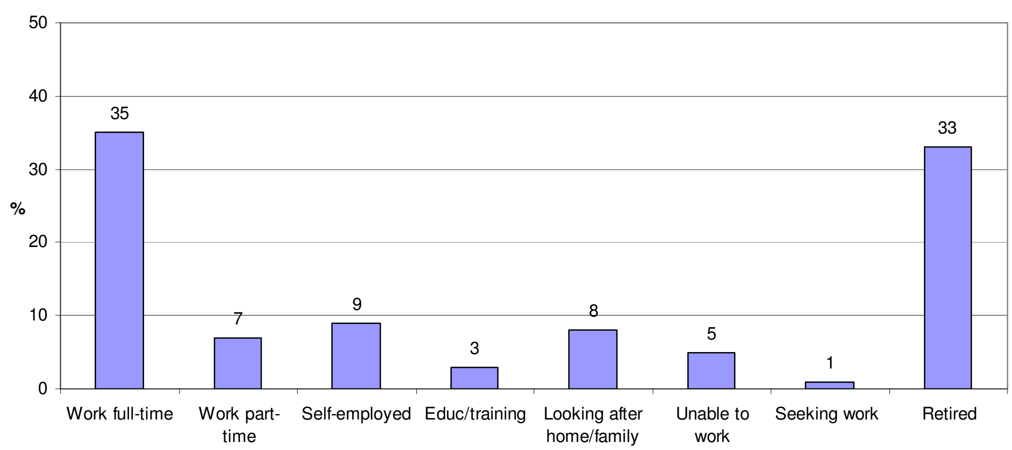
Into which of these age bands do you fall? Base 127



7.2 Analysis of the occupational status of the head of household for residents shows that 51% were working: 35% full-time, 7% part-time and 9% self-employed. 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 127

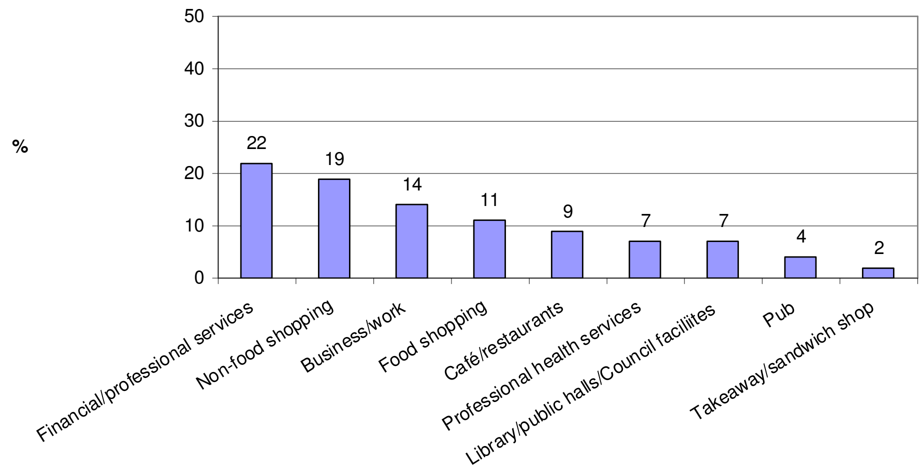


Overall usage

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 purposes were financial/professional services i.e. bank, solicitor (22%) and non-food shopping (19%).

Figure 7.3 Main purpose for normal visit

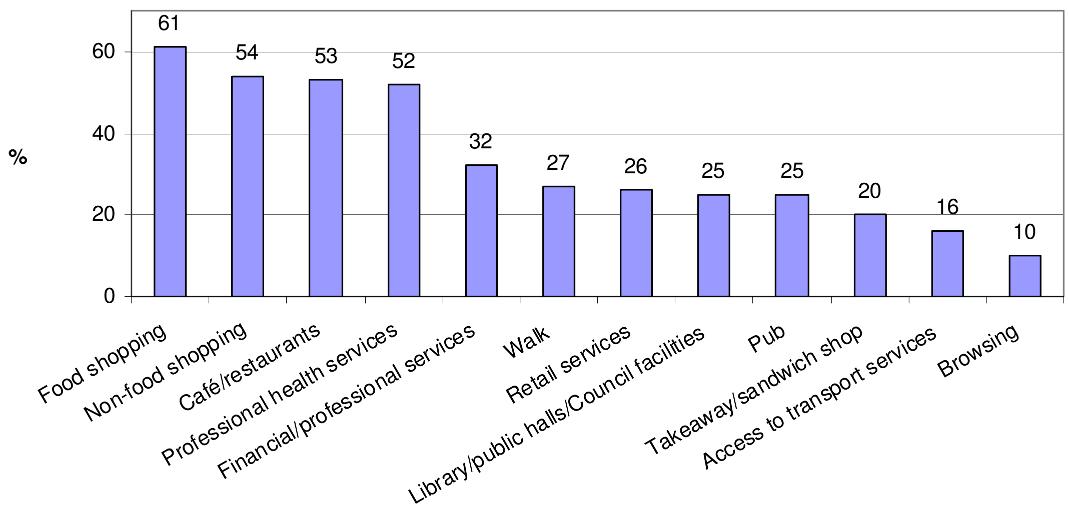
What is your MAIN reason for normally visiting this town centre? Base 127



7.4 Residents were then asked to select any **other purposes** for a normal visit; this generated a broader set of responses, in particular for: food shopping (61%), non-food shopping (54%), café/restaurants (53%), professional health services i.e. doctor, dentist 52% and financial/professional services e.g. bank, solicitor (32%).

Figure 7.4 Other purposes for normal visit

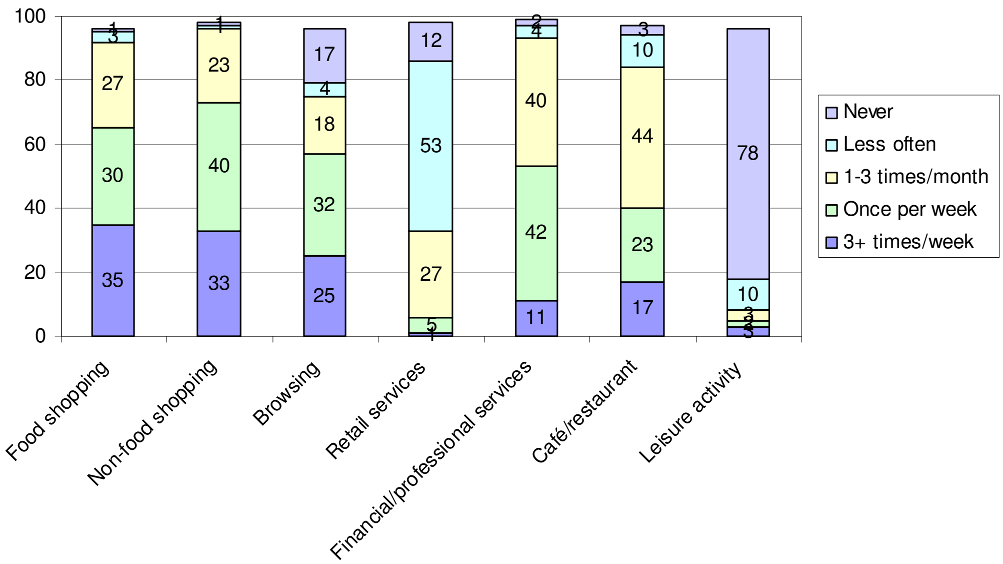
What OTHER reasons do you have for normally visiting this town centre?
Base 127



7.5 A list of types of shopping and services was shown and residents were asked how often, if at all, they normally visited the town centre for each. The frequency of shopping was highest: 35% making at least 3 visits per week for food shopping and 33% for non-food shopping. Visits for browsing/window shopping at least once a week were made by 57%. Financial/professional services were used at least once a week by 53% of residents and usage of retail services was less frequent 33% at least once a month. 78% of residents never normally use the town centre for leisure activities i.e. cinema, health & fitness, society/club.

Figure 7.5 Frequency of usage

How often do you normally visit this town centre during the day? Base 127



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 76% of respondents claiming no change. However 13% visit the town centre less often than last year. The main reasons for using less were changes in personal circumstances i.e. change in work or family situation. A full list of comments for using less often 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: 127	
	%
More often	8
About the same	76
Less often	13

7.7 43% of residents normally walk to the town centre, 35% use a car and 19% use a bus.

Table 7.7 Method of transport to travel to town centre

How do you normally travel to the town centre?

Base: 127	
	%
Walk	43
Car	35
Bus	19
Cycle	3

7.8 One-quarter (25%) of residents normally spend less than 1 hour when visiting the town centre and a further 56% 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?

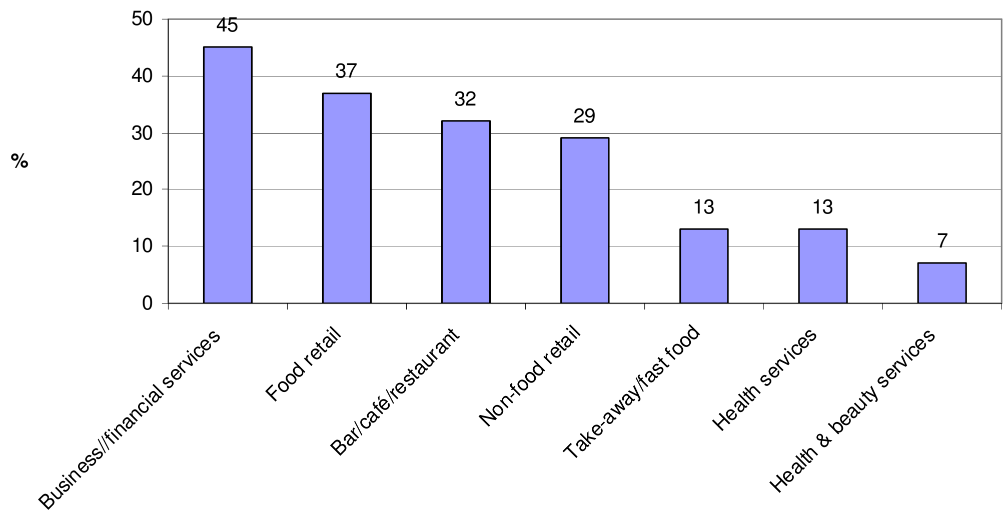
Base: 127	
	%
Less than 1 hour	25
1-2 hours	56
3-4 hours	9
5-6 hours	3
All day	3

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 (45%), food shopping (37%) and bar/café/restaurants (32%).

Figure 7.9 Types of shopping of services used

What did you buy/what services did you use? Base 127



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. The average spend on food and non-food was highest. The total average spend on residents' last visits was £51.56.

Table 7.10 Average spend on last occasion

Business and Financial Services	£4.41
Bar/Cafe/Restaurant	£10.27
Retail (non-food)	£12.81
Retail (food)	£11.41
Takeaway and Fast Food	£3.20
Health Services (e.g. dentist, opticians)	£1.41
Health and Beauty Services (e.g. hairdresser, nail salon)	£8.05
Total	**£51.56**

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 (60%) followed by general positive comments regarding the shops/services in town centre (18%). A selection of verbatim comments is shown in Table 7.11.1 and a 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: 127	
	%
Convenience generally	60
Positive to shops/service	18
People/friendly	13
Support local shops	11
Closeness to work	7
Specific shops/service	5
General positive aspects	5
Friends/relatives	1

Table 7.11.1 Example of verbatim reasons for using town centre

Reasons to use	**Town Centre**
Convenience generally	*“Convenient, can meet friends for coffee”* *“ Convenient to get to”* *“Easy to get to by bus”* *“Handy for everyday things”* *“Local and easy to get to”* *“Most of what you need can be got in town centre”*
Positive to shops/services	*“Some shops that you don't get anywhere else”* *“Like the shops here”* *“Good selection of shops and cafes”* *“Different types of shops in Prestwick”* *“Some very good shops in the town centre”*
People/friendly	*“Nice people like the feel of the town”* *“Great community spirit here”* *“staff are friendly and pleasant”*
Support local shops	*“Like the town centre. Like to support local”* *“Like to support Prestwick trades”*

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 clearly because it was closest main shopping area (78%). The most common other reasons were: positive feel to town centre (71%), attractive and well-maintained town centre (66%) and quality of shops/services (62%)

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?

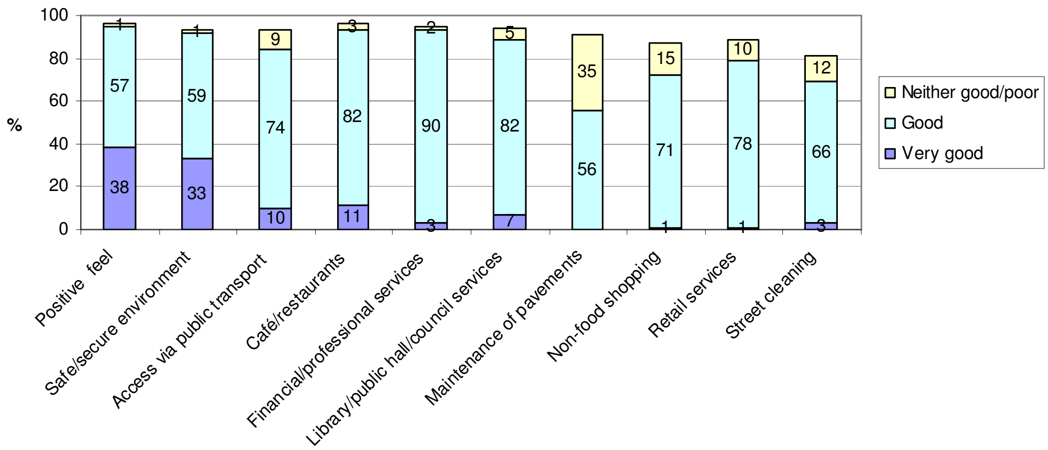
Base: 127	Main reason	Other reasons
	%	%
Closest main shopping area	**78**	13
Positive feel to town centre	5	71
Quality of shops/services	4	62
Quality of café/restaurants	3	48
Attractive/well-maintained town centre	1	66
Variety of shops/services	1	51
Specific shop/service	1	29
Good public transport	0	29
Good car parking	0	0

Attitudes and factors that would encourage usage

7.13 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 7.13 shows those features which were generally rated positively (**very good or good).** In particular, positive feel (38%) and safe/secure environment (33%) were commonly rated as **very good**. Other features which were rated as **good** included: financial/professional services (90%), café/restaurants (82%), and library/public hall/council services (82%).

Table 7.13 Attitudes towards town centre

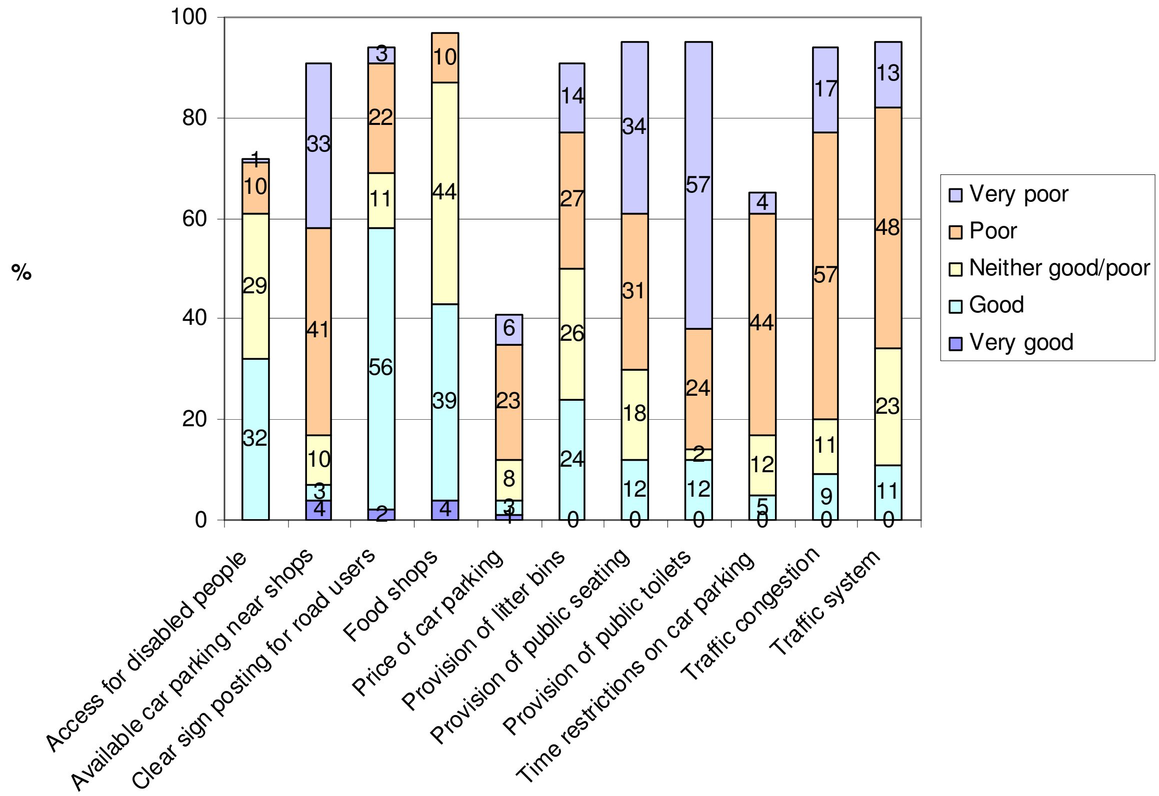
How do you rate this town centre with regard to the following? Base 127



7.14 Features rated most commonly as **very poor** were: availability of public toilets (57%), availability of public seating (34%) and availability of car parking near to shops (33%). Also commonly rated as **poor/very poor** were traffic congestion (74%) and traffic system (61%).

Table 7.14 Attitudes towards town centre

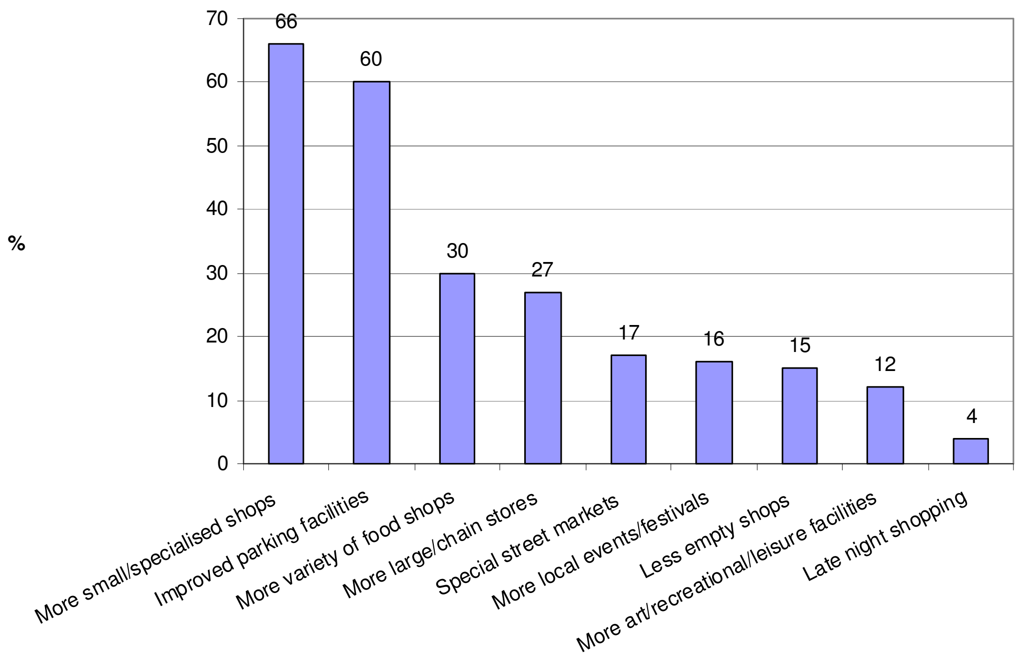
How do you rate this town centre with regard to the following? Base 127



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 suggested changes were: more small/specialised shops (66%) and improved parking facilities (60%).

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 127

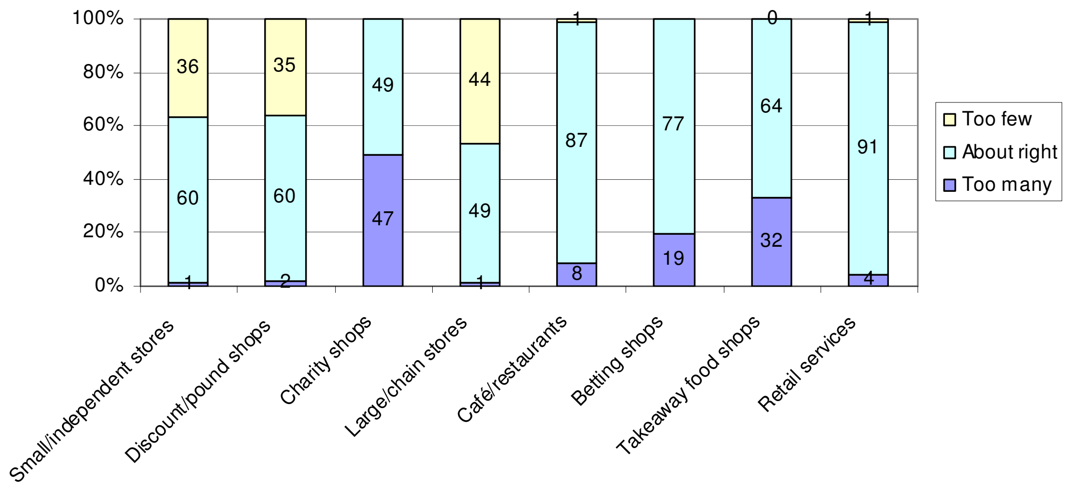


7.16 Residents were shown a list of different types of outlets in the town centre; for each they were asked if there were: too many, about right or too few. Generally the balance was about right, although some residents felt there were too few large/chain stores (44%), too few small/independent stores (36%) and too few discount/pound shops (35%). Nearly half (47%) felt there were too many charity shops.

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 127



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 (57%). A selection of verbatim comments is shown in Table 7.18.1 and a 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: 90	%
Improved shops/services	57
Less traffic/traffic improvements	25
Better/cheaper parking	20
Fill empty shops	4
Better public transport	1

Table 7.17.1 Example of verbatim reasons for improving town centre

Reasons to use	Town Centre
Improved shops/services	*"Have a Clarks shoe shop; would like a Pizzeria"* *"Less charity shops, need more clothes shops"* *"M&Co would be good. Turn Broadway into bowling alley or something for kids"* *"Need a TK Max or Matalan"* *"Need gents shoe shop"* *"Use Broadway as Arts Centre like Harbour Arts in Irvine"* *"Would like 4 star hotel in centre"* *"Regenerate tourism"*
Less traffic/traffic improvements	*"Less heavy traffic, cutting through"* *"Stop HGV coming along the Main street"* *"Lower pavements; more road crossings"*
Better/cheaper parking	*"Do not get rid of the short term parking bays"* *"More parking"* *"Free large carpark more disabled spaces"*

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 was the primary location used overall for shopping – Ayr, Heathfield for food shopping (66%) and Ayr, Heathfield (34%) and Ayr town centre (22%) for non-food shopping. Prestwick town centre was the primary location for services – financial (82%) and retail (78%) and also for café/restaurants (83%).

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 127

	Food	Non-food	Financial services	Retail services	Café/ restaurant
	%	%	%	%	%
Ayr, Heathfield	66	34	1	0	0
Ayr, Town Centre	3	22	4	7	2
Irvine Rivergate/Town	1	8	1	1	1
Kilmarnock Town Centre	6	7	3	5	4
Prestwick Town Centre	**15**	**15**	**82**	**78**	**83**
Troon Town Centre	5	4	7	8	9
Silverburn	0	6	0	1	1
Glasgow City Centre	0	4	0	0	1
Other/Not answered	4	0	2	0	0

7.19 Residents were then asked to select any **other locations** for shopping and services. Results show that Ayr town centre was a key location for: café/restaurants (48%), financial services (49%) and retail services (42%). Ayr, Heathfield was the highest overall other location for non-food shopping (45%).

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 127

	Food	Non-food	Financial services	Retail services	Café/ restaurant
	%	%	%	%	%
Ayr, Heathfield	37	45	1	0	0
Ayr, Town Centre	31	32	49	42	48
Irvine Rivergate/Town	18	40	12	14	23
Kilmarnock Town Centre	10	13	15	12	12
Prestwick Town Centre	37	27	22	24	20
Troon Town Centre	3	8	4	4	15
Silverburn	14	23	1	0	11
Glasgow City Centre	0	10	2	2	5
Braehead Centre	4	8	0	1	6

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. For food shopping, good car parking was a factor (72%); for non-food shopping, the variety of shops (71%); for services, the closeness of location (financial services 59% and retail services (58%); and for café/restaurants, the quality of the premises was key (73%).

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 127

	Food	Non-food	Financial services	Retail services	Café/ restaurant
	%	%	%	%	%
Closest main shopping area	48	32	59	58	52
Variety of shops and services	52	71	22	24	18
Quality of shops and services	36	44	32	36	27
Quality of cafes/restaurants	7	8	29	26	73
Good car parking	72	43	4	1	21
Good public transport	26	30	14	16	10
Attractive/well maintained town centre	15	12	25	29	30
Positive feel	11	8	31	33	30

Evening usage of town centre

7.21 Of the 127 residents interviewed, 59% visited the town centre facilities in the evening and 41% did not. Those who did not most commonly gave the following reasons: no need/don't go out 88% and prefer to go elsewhere 10%.

7.22 Table 7.20 shows the most common purposes of visiting the town centre in the evening. 76% of those using the town centre in the evening visited café/restaurants and 61% visited pubs/bars/nightclubs.

Table 7.20 Purpose of visits to town in evening

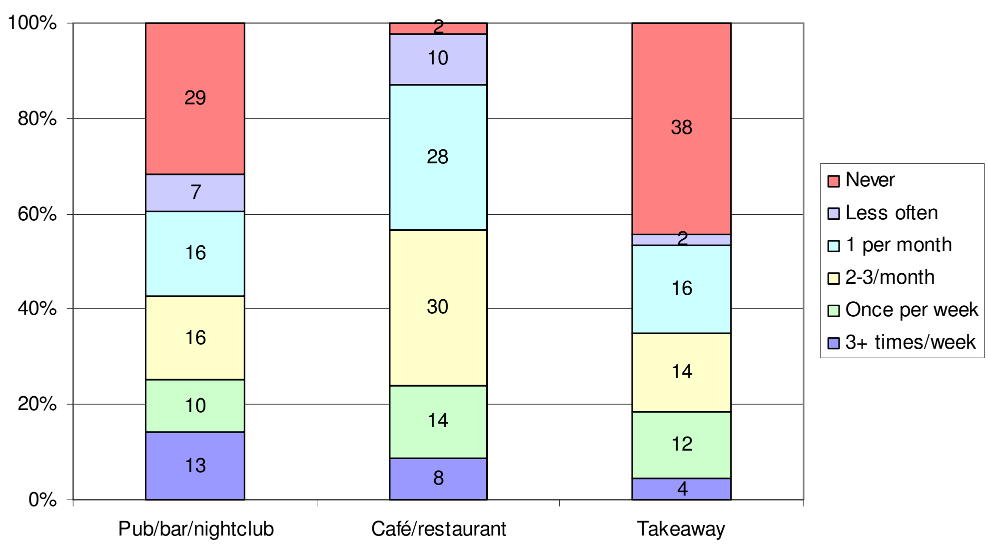
For what purposes do you visit the town centre in the evening?

Base: 75	
	%
Pub/bar/nightclub	61
Café/restaurants	76
Takeaway	25
Society/club	7
Food shopping	2
Sports/gym/health & fitness	2

7.23 Residents were asked how often they visited different types of venues in the evening and the most common elements are show below. 22% of those that use the town centre in the evening visit cafes/restaurants at least once a week and 23% visit pub/bar/nightclubs at least once a week.

Table 7.23 Frequency of using town centre in evening

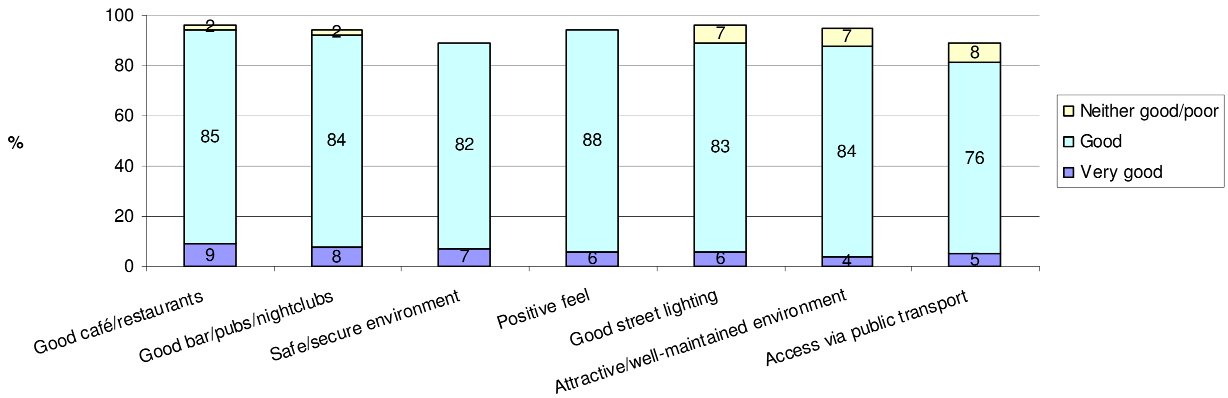
How often do you go into this town centre in the evening for these things? Base 75



7.24 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 that the majority of attributes were rated positively (**very good/good)** for the town centre in the evening.

Table 7.24 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 75



7.25 Only two features were rated by 10% or more of respondents as being poor/very poor: available car-parking (36%) and variety of things to do (10%) – although 63% rated this latter feature as good.

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 75