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South Ayrshire Town Centre Assessment

Troon Town Centre: Shopper and Resident Surveys

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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 Troon 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 Troon Town Centre. Shoppers were randomly recruited at three locations: junction of Templehill/Ayr Street, junction of Portland Street/Church Street and in the shopping parade (New Look)

1.10 **Residents Survey**: 125 face-to-face interviews were undertaken with residents within Troon town centre boundary and the landward villages of Dundonald and Loans. 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 TROON CONCLUSIONS: SHOPPER AND RESIDENT

Shoppers and residents are attracted by the wide variety and good quality of food shopping in Troon town centre; these outlets are frequently used and are contributing to the usage of the town centre. The quality and variety of shops and services also contribute to the usage of the town centre, resulting in it being the primary location used for shops/services by shoppers and residents.

A proportion of shoppers are likely to be visitors to the area. A key reason for usage of the town centre by shoppers was the quality café/restaurants. Residents were more likely to be using professional health services and financial/professional services and non-food shops.

An important factor in the assessment and use of Troon town centre was the positive rating of features: including price of car parking, safe/secure environment, cafes/restaurants, financial/professional services, retail services and having a positive feel.

Potential opportunities exist to consider improvements in perceived traffic congestion and the traffic system and also in vision of public toilets and of pubic seating. Further opportunities exist to improve the overall shopping experience; more large/chain stores, more discount/pound shops, better variety of food shops and less charity shops.

Most features of Troon town centre in the evening were rated positively, although there are opportunities to improve access via public transport, the presence of good bars/pubs/nightclubs and variety of things to do in evening.

3.0 OVERALL SUMMARY: TROON SHOPPER AND RESIDENT

Profile of shopper and residents

69% 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 41% 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 shoppers lived locally or worked in Troon town centre. However, 27% were visitors to the area.

Overall usage

The **main** purpose for visiting Troon town centre was for the food shopping, by shoppers and residents. Shoppers are more likely to be browsing in the town centre and residents are more likely to be using financial/professional services, professional health services and non-food shopping. Frequency of visiting food shops at least 3 times a week is 66% among residents and 52% among shoppers and over 40% of both samples are using financial/professional services at least once a week; this confirms the contribution of these retail and service sectors in supporting usage of Troon town centre.

Frequency of usage of the town centre by both surveys in the past year is very stable. Shoppers are more likely than residents to use a car (41% vs. 32%).

Purchase behaviour

The main purchase or service types made in both surveys are in the food and non-food shopping and half of shoppers will either visit a bar/café/restaurant or takeaway/fast food outlet. The average total spend by shoppers on the occasion of their visit was £33.84 and the average total for residents on their most recent visits as £24.58.

The key reason for using Troon town centre shops/services was the convenience of it being the closest main shopping area. Other reasons for usage included the quality and variety of the shops and services and a proportion of shoppers were visiting as a day trip/holiday.

Attitudes and factors that would increase usage

Troon town centre was highly rated for a range of features by shoppers and residents; in particular the price of car parking, cafes/restaurants, financial/professional services, retail services, a safe/secure environment and a positive feel.

There were indications of some dissatisfaction with traffic congestion, traffic system and availability of public toilets.

The most popular changes to encourage increased usage of the town centre were: less empty shops, more large/chain stores and better variety of food shops. *"Competition for supermarket" "It's either charity shops or designer. Need something in the middle and cheaper food shops", "Better choice of food shops", "Better range of supermarkets – more competition"* Both surveys felt there were too few large/chain stores, too few discount/pound shops and too many charity shops.

Usage of different locations for shopping/services

The main location used by residents and shoppers for services was Troon town centre, indicating that the retail and service offering is largely meeting their requirements. Ayr town centre is a support location and Irvine Rivergate/town centre to a lesser degree.

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

Evening usage of town centre

33% of shoppers and 37% of residents visit Troon town centre in the evening. Residents are more likely to visit pubs/bars/nightclubs than shoppers (80% vs. 47%).

Most features of the town centre in the evening were rated positively: good café/restaurants, good street lighting, safe/secure environment, positive feel, public transport and attractive/well-maintained environment. There was some dissatisfaction from shoppers for availability of car parking and access via public transport in the evening and from residents for good pubs/bars/nightclubs and variety of things to do in the evening.

4.0 TROON SHOPPER SUMMARY

Shopper profile

There was a female skew to the shopper profile, with 69% of respondents being female and 31% male which is usual for shopper surveys of this type. Shoppers were from a range of age groups, with 41% aged 55+. The occupational status of the head of household was mainly working (57%) and 27% were retired.

The majority of shoppers lived locally (66%). However, 27% 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 shopping, mainly food shopping (41%) and non-food shopping (26%). **Other** purposes included browsing/window shopping (27%), café/restaurant (21%), out for a walk (16%) and takeaway/sandwich shops (16%). Relatively few purposes involved use of services i.e. financial/professional services (5%). Respondents were making frequent shopping trips to the town centre; 52% visited at least 3 times a week for food shopping, (27% on daily basis) and 39% for non-food shopping. 49% of shoppers used financial/professional services at least once a week.

Frequency of usage of the town centre has been stable in the past year (95% saying that their usage has not changed). 41% of shoppers used a car to travel to the town centre, with 28% walking. The majority of shoppers (63%) intended to spend under 2 hours in the town centre, 32% under 1 hour.

Purchase behaviour

The main purchase made or service used (or intended) reflected the dominance of the retail sector in Troon - 67% for non-food retail and 46% for food retail. Over half visited a bar/café/restaurant and/or takeaway shop during their visit. An average of £16.59 was spent on non-food shopping and £6.78 on food shopping. The total average spend in Troon town centre on the occasion of the visit was £33.84

The **main** prompted reason for shopping in Troon on this occasion was the convenience of it being the closest main shopping area (52%). **Other** reasons given by shoppers included the variety of shops/services (48%) and the quality of shops/services (40%). A smaller proportion mentioned the quality of café/restaurants (18%) and the attractive/well-maintained town centre (18%). Spontaneous reasons for their visit reflected convenience (42%) and 21% to visit Troon as a holiday/day trip.

Attitudes and factors that would increase usage

Troon town centre was rated as **very good** for: price of car parking (47%), cafes/restaurants (47%), non-food shopping (41%), positive feel (31%) and safe/secure environment (16%). It was also well regarded for public realm features such as provision of litter bins, access for disabled people, maintenance of pavements and library/public hall/council facilities. The three features rated highest as **poor/very poor** (albeit by a minority of shoppers) were: traffic congestion (25%), the traffic system (27%) and provision of public toilets (21%).

The most popular changes to shops/service which would encourage increased use of the town centre were: more large/chain stores (35%), less empty shops (26%) and more variety of food stores (20%). Generally the balance of different types of outlets was about right in Troon, although 75% of shoppers felt there were too few large/chain stores, 61% too few discount/pound shops and 45% too many charity shops.

The key spontaneous improvement to the shopping experience was an improvement to shops/service – cited by 61*%: "Better choice of food shops", "Better range of supermarkets – more competition", "Empty shops are an eyesore", "Fill-up those empty shops with small businesses."*

Usage of different locations for shopping/services

The **main** location used for different types of shopping or services was Troon town centre, with 13% using Irvine Rivergate as main location for food shopping and 14% Ayr town centre for non-food shopping. **Other** locations used confirm that these are also the key support locations for shopping and services. Closeness for shopping or service use was the key reason for usage and also a good variety of shops/services and quality of shops/services.

Evening usage of town centre

33% of shoppers visited the town centre in the evening and, of these, 47% visited pub/bar/nightclubs and 49% café/restaurants. Weekly usage of pub/bar/nightclub was 30% and was less for café/restaurants – 53% once a month or less.

The evening town centre feature that was most commonly rated as **very good** was good cafes/restaurants (24%) and other evening town centre features commonly rated as **good** were: pubs/bars/nightclubs (71%), safe/secure environment (78%) and positive feel (61%). Two features were rated relatively higher as **poor/very poor**, both concerning access to the town centre in the evening – available car parking (30%) and access via public transport (24%).

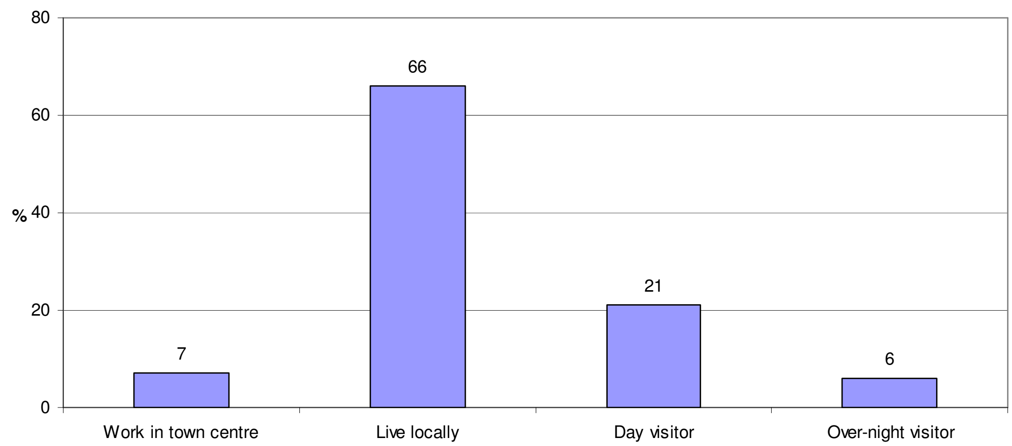
5.0 TROON SHOPPER KEY FINDINGS: TOWN CENTRE

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 (66%) lived locally and 27% were visitors to the area. Further detailed analysis of the data shows that 29% of visitors live outside South Ayrshire, including 3% from outside Scotland. Therefore, not all shoppers and service users surveyed in the town centre are necessarily local residents or workers.

Figure 5.1 Type of visitor to town centre

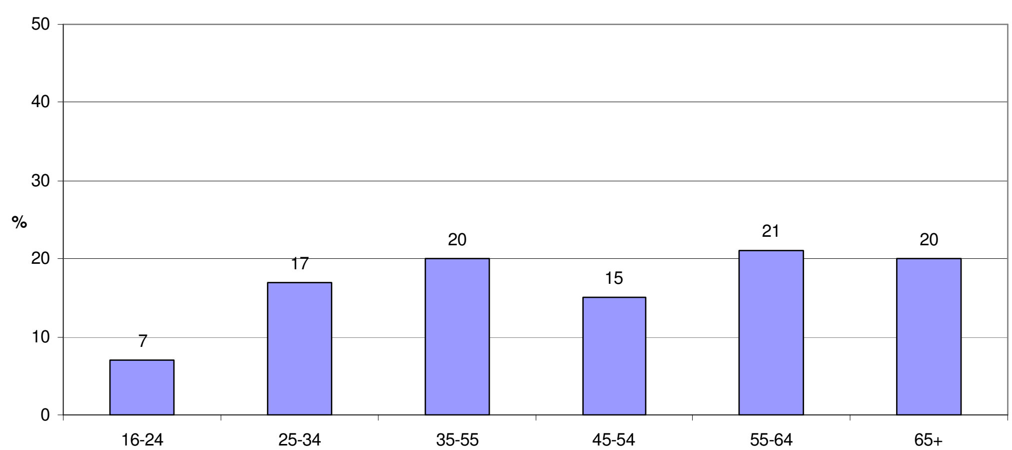
Which type of visitor to this town centre best describes you today? Base 150



5.2 There was a female skew to the shopper profile, with 69% female and 31% male; this gender skew is typical of shopper surveys. The age group profile of visitors is shown in Figure 5.2: 41% 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

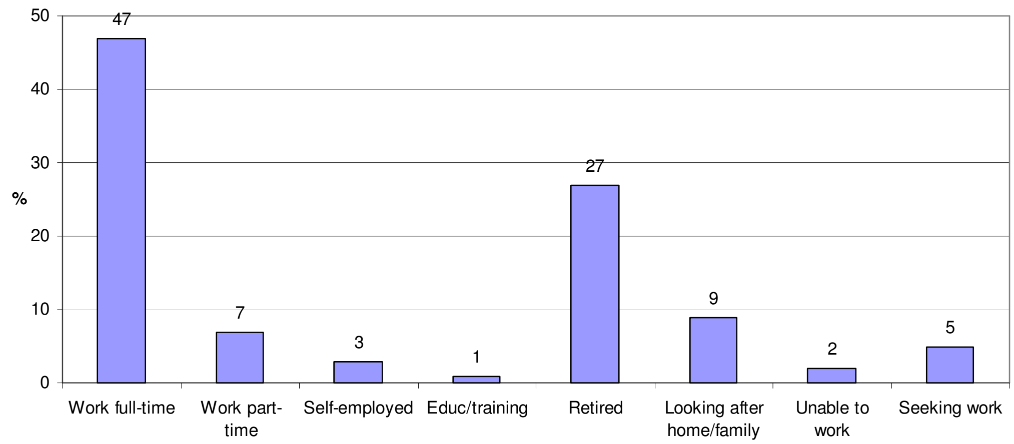


5.3 Analysis of the occupational status of the head of household for shoppers shows that the majority were working: 47% were working full time and a further 7% part-time. 27% of the household heads were retired.

Figure 5.3 Occupational status of head of household

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

Base 150

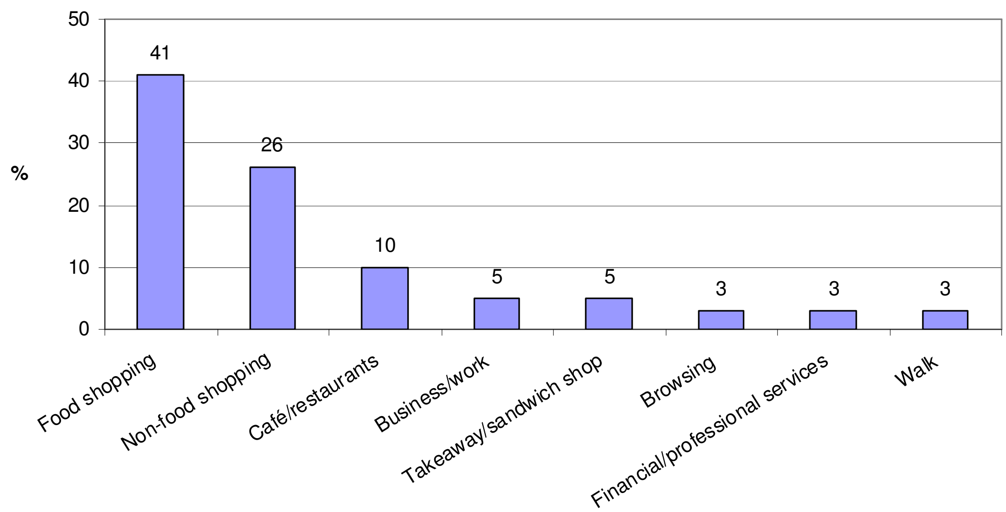


Overall usage

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. Shopping was the highest main purpose: food shopping (41%) and non-food shopping (26%). 10% of shoppers claimed their main purpose was to visit a café/restaurant and a further 5% for takeaway/sandwich shop. Use of services as a main purpose for visiting was relatively low: 3% for professional/financial services i.e. bank, solicitor.

Figure 5.4 Main purpose for visit

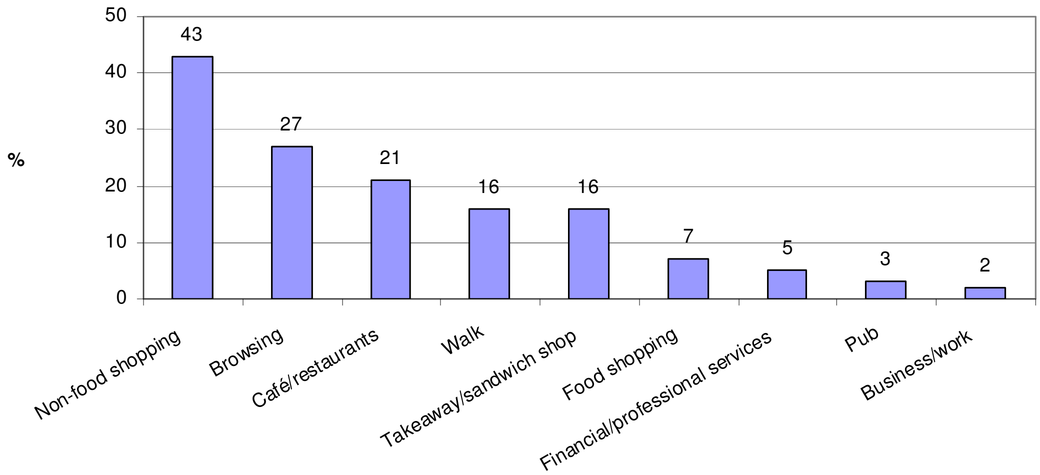
What is your MAIN reason for visiting this town centre today? Base 150



5.5 Shoppers were then asked to select any **other purposes** for their current visit and the most common of these are shown below. This generated a broader set of responses, particularly for non-food shopping (43%), browsing (27%) and use of café/restaurants (21%).

Figure 5.5 Other purposes for visit

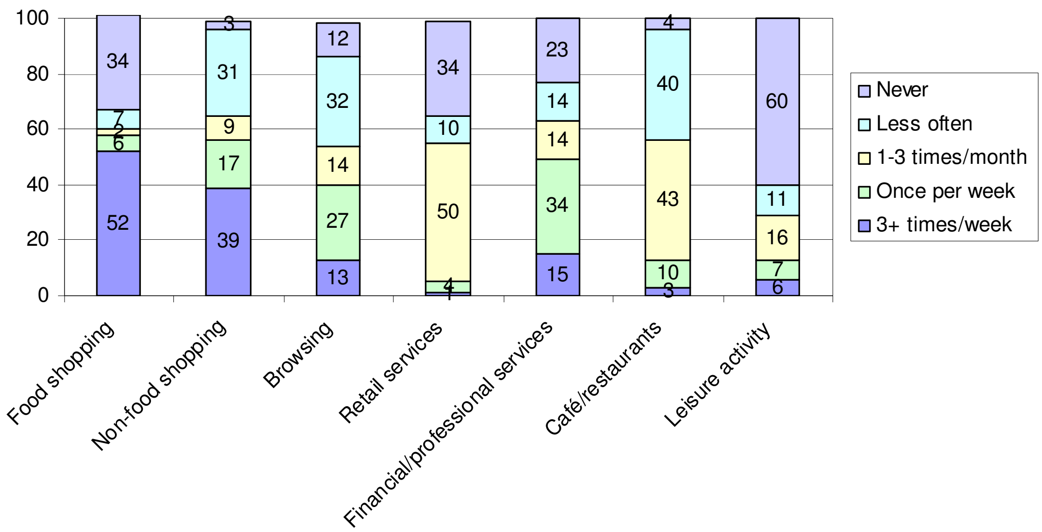
What OTHER reasons do you have for visiting this town centre today? Base 150



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. 52% of respondents visited at least 3 times a week for food shopping (27% visited daily) and 39% visited at least 3 times a week for non-food shopping[1]. Financial/professional services were also frequently used – 49% at least once a week and 56% of shoppers visited café/restaurants at least once a month. 60% of shoppers never visit the town centre for leisure activities.

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 (95%) are using the centre about the same frequency as last year, reflecting strong stability in usage.

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	4
About the same	95
Less often	1

[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 41% of shoppers used a car to travel to the town centre on the occasion of their visit and 28% walked. A total of 27% 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	41
Walk	28
Bus	20
Train	7

5.9 Table 5.9 shows that nearly a third of (32%) were planning to spend less than 1 hour in the town centre and 31% 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?

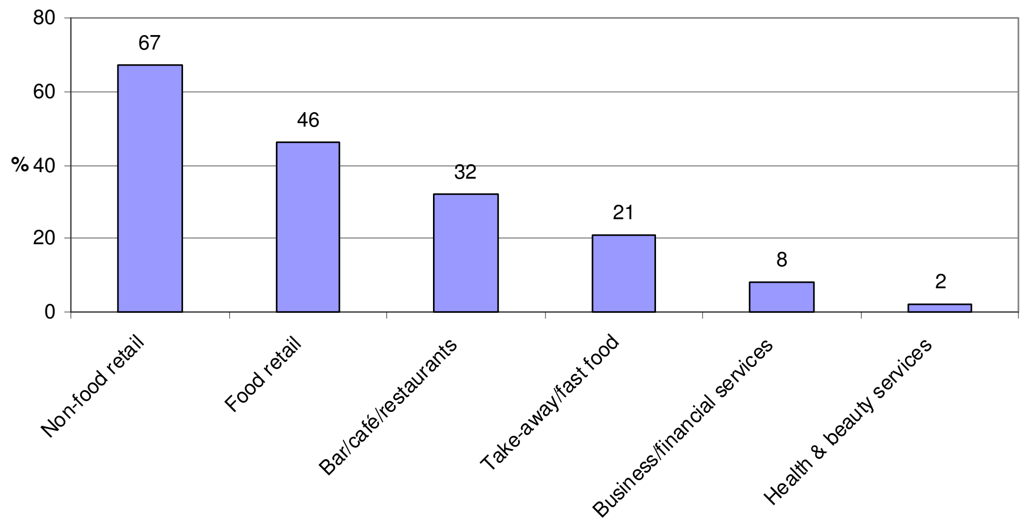
Base: 150	
	%
Less than 1 hour	32
1-2 hours	31
3-4 hours	22
5-6 hours	9
All day	5

__Purchase behaviour__

5.10 The main types of purchases made or services used (or intended to) are shown in Figure 5.10. The main answers reflect the main purpose of the visit which was for shopping: 67% of shoppers had purchased (or intended to) non-food retail and 46% food retail. A total of 53% of shoppers had purchased (or intended to) from bar/café/restaurants or takeaway/fast food shops (32% and 21% respectively). Usage of business/financial services was relatively low.

Figure 5.10 Types of purchases/ services used or intended

What have you bought/expect to buy and/or which services have you used/expect to use today? Base 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. Non-food retail had the highest average spend (£16.59) and the average spend for other categories was under £10. The total average spend in the town centre on the occasion of this visit was £33.84.

Table 5.11 Average spend on this occasion

Business and Financial Services	£2.02
Bar/Cafe/Restaurant	£5.89
Retail (non-food)	£16.59
Retail (food)	£6.78
Takeaway and Fast Food	£1.59
Health Services (e.g. dentist, opticians)	£0.00
Health and Beauty Services (e.g. hairdresser, nail salon)	£0.72
Other	£0.24
Total	**£33.84**

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 (42%) followed by being on holiday/day trip (21%) and closeness to work (13%). 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: all giving an answer	**103**
	%
Convenience generally	42
Holiday/day trip	21
Closeness to work	13
General positive aspects	9
Friends/family	7
Positive to shops/service	5
Specific shops/service	3

Table 5.12.1 Example of verbatim reasons for using town centre

Reasons to use	**Town Centre**
Convenience generally	*"Don't have to travel far"* *"Easier for me to do my shopping"* *"Don't need to travel"* *"Easy to get to – live round the corner"*
Holiday/day trip	*"Like to have a day out in Troon"* *"Nice day to come to the coast"* *"My friends wanted me to come here to meet-up"*
General positive aspects	*"Support local town centre"* *"Knew they would have what I needed"* *"Always liked coming here"* *"Quieter than Kilmarnock"*

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**. As was shown in Section 5.12, proximity to this main shopping area was a key reason to visit (52%); also quality of shops/services (17%) and variety of shops/services (11%). Other reasons most commonly mentioned were: the variety of shops/services (48%) and the quality of shops/services (40%)

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?

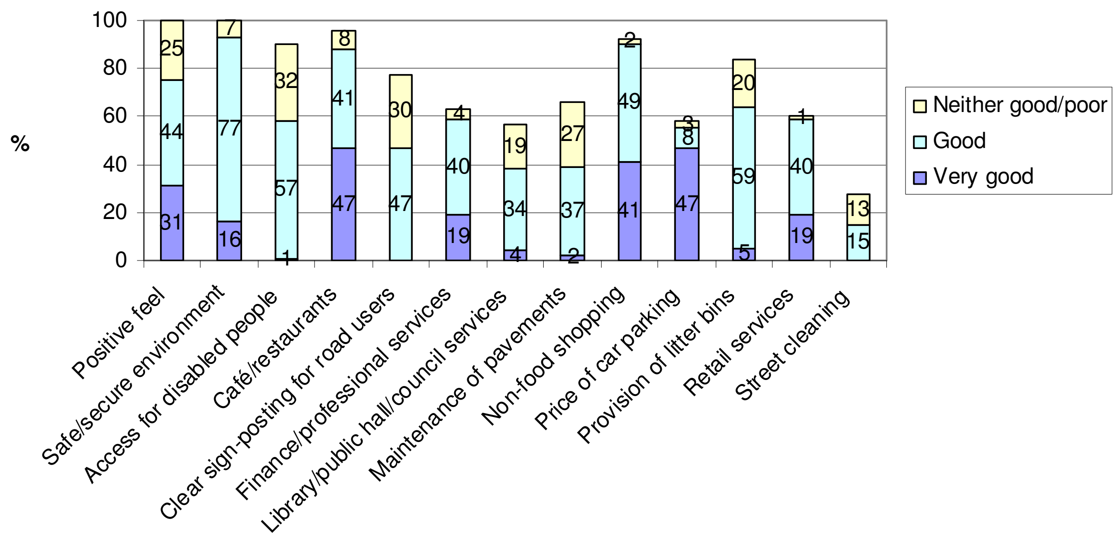
Base: 150	**Main reason**	**Other reasons**
	%	%
Closest main shopping area	**52**	3
Quality of shops/services	17	40
Variety of shops/services	11	48
Quality of café/restaurants	7	18
Specific shops/services	5	5
Attractive/well-maintained town centre	2	18
Good public transport	3	9
Positive feel to town centre	2	12
Good car parking	0	2

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 either: very good, good, neither good nor poor, poor or very poor. Table 5.15 shows those statements which were commonly rated **very good/ good.** The features rated higher as **very good** were: price of car parking (47%), cafes/restaurants (47%), non-food shopping (41%) and positive feel (31%). Features which were rated higher as **good** included: safe/secure environment (77%), provision of litter bins (59%), access for disabled people (57%), clear sign-posting for road users (47%), retail services i.e. hair dresser (40%), maintenance of pavements (37%) and library/public halls/council services (34%).

Figure 5.14 Attitudes towards town centre

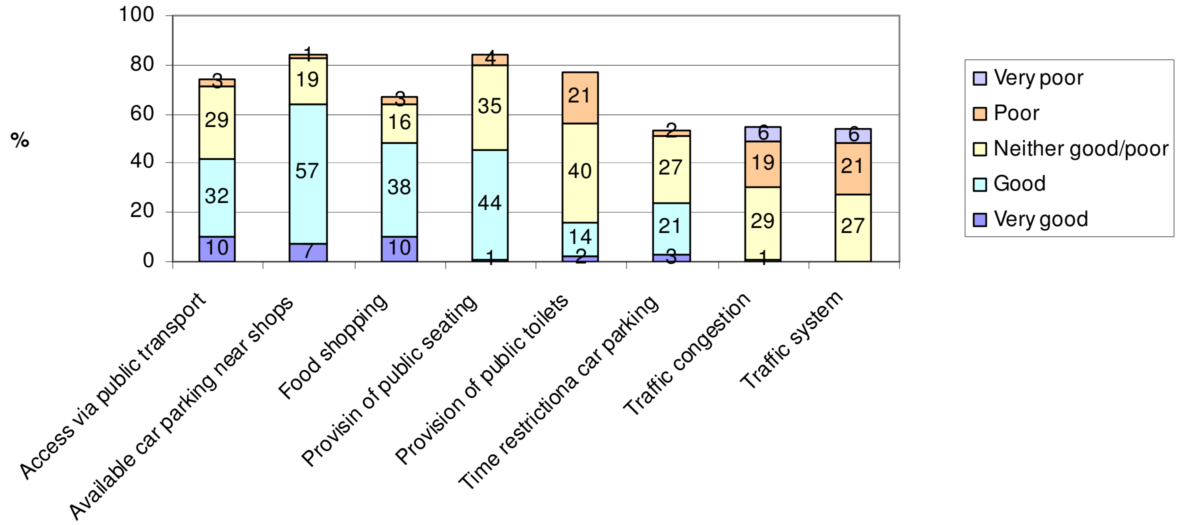
How do you rate this town centre with regard to the following? Base 150



5.15 Only a few features were commonly rated as poor/poor: traffic congestion (25%), traffic system (27%) and availability of public toilets (21%).

Figure 5.15 Attitudes towards town centre

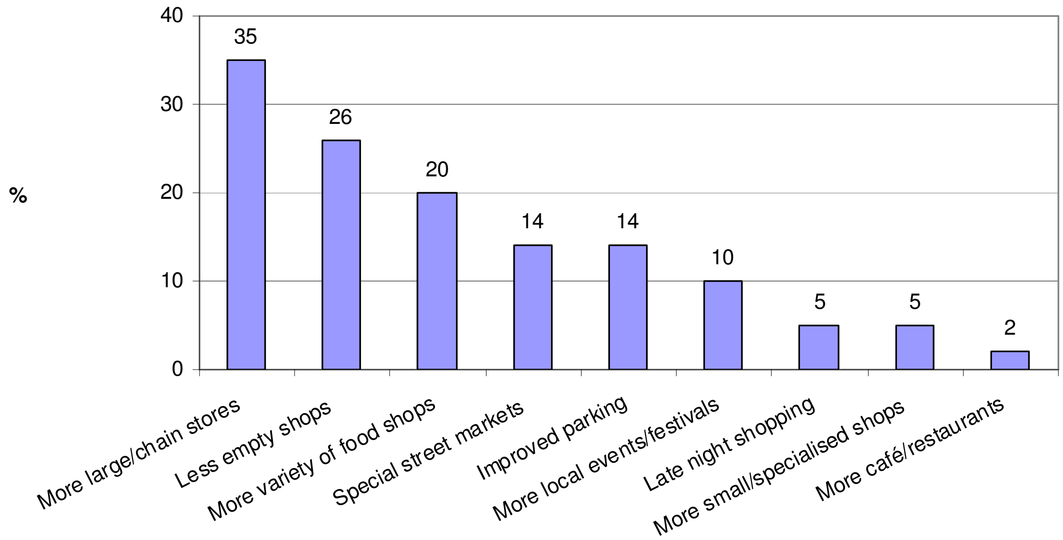
How do you rate this town centre with regard to the following? Base 150



5.16 Table 5.16 shows the changes to town centre which would encourage shoppers to use the town centre more often; shoppers were asked to provide up to three changes from a list and the most common are detailed below. The most popular changes suggested were for more large/chain stores (35%), less empty shops (26%) and more variety of food shops (20%).

Figure 5.16 Changes to attract more usage of town centre

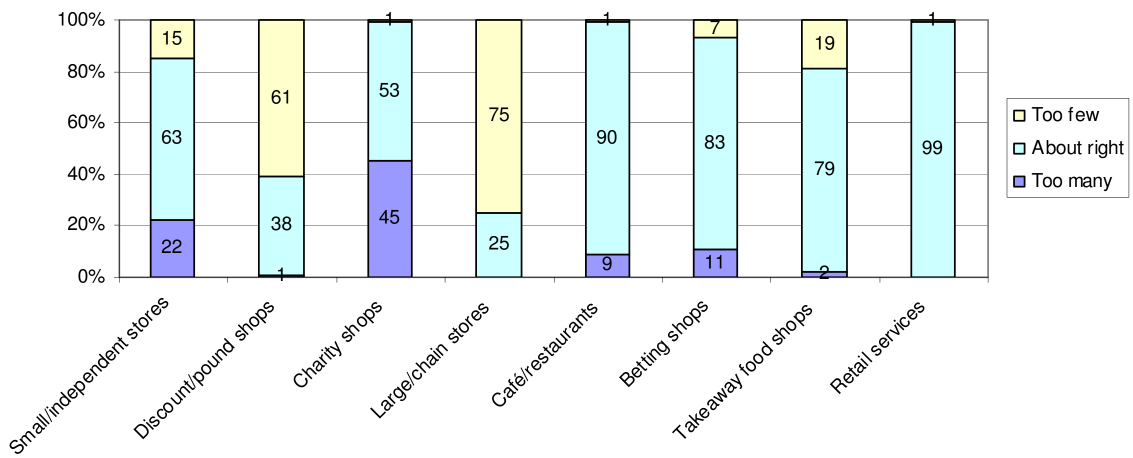
Which, if any, of these changes to shops/services would encourage you to use this town centre more? Base 150



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. Generally the balance was about right, although 75% of shoppers felt there were **too few** large chain stores, 61% felt there were too few discount/ pound shops 61%) and 45% of shoppers indicated there were **too many** charity 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 150



5.18 Table 5.18 shows the spontaneous categories which shoppers felt would improve their shopping experience in the town centre. This was asked as an open-ended question and respondent verbatim answers were coded into categories. The key category was that of improvements to shops (61%). 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: 84	
	%
Improvements to shops	61
Less empty shops	19
Less traffic/traffic improvements	10
Better/cheaper parking	6

Table 5.18.1 Example of verbatim reasons for using town centre

Reasons to use	Town Centre
Improvements to shops	*"Better choice of food shopping"* *"Better range of supermarkets"* *"Bigger shops"* *"Competition for the supermarket"* *"Clothes shops"* *"Better choice of shops"*
Less empty shops	*"Fill up the empty shops"* *"Get people to take on the empty shops"* *"Empty shops are an eyesore"* *"Small businesses taking over empty shops".*
Less traffic/traffic improvements	*"Less Traffic Congestion"* *"One way traffic system"* *"Something needs to be done about the parking. There are a lot of cars blocking the pavement in my street"* *"More all day parking"*

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. Troon town centre was the main location used overall and 13% of shoppers used Irvine, Rivergate as their main location for food shopping and 10% used Kilmarnock town centre.

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 150

	Food	**Non-food**	**Financial services**	**Retail services**	**Café/ restaurant**
	%	%	%	%	%
Ayr, Heathfield	5	2	0	0	0
Ayr, Town Centre	7	14	14	13	13
Irvine, Rivergate	13	11	1	1	1
Irvine Town Centre	3	1	4	2	2
Kilmarnock Town Centre	10	10	9	8	9
Prestwick Town Centre	1	0	1	1	1
Troon Town Centre	**45**	**46**	**56**	**57**	**57**
Silverburn	0	0	0	0	0
Glasgow City	3	3	3	3	3
Other	7	7	7	8	7
Not answered	7	7	7	7	7

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 and Irvine Rivergate/town centre were the key 'other' locations 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 150

	Food	Non-food	Financial services	Retail services	Café/ restaurant
	%	%	%	%	%
Ayr, Heathfield	13	11	0	0	3
Ayr, Town Centre	25	31	33	32	33
Irvine Rivergate	34	24	5	6	13
Irvine Town Centre	17	25	26	26	30
Kilmarnock Town	4	5	5	5	6
Prestwick Town	0	1	4	3	5
Troon Town	10	24	13	5	24
Silverburn	11	14	7	5	14
Braehead	5	7	5	5	9
Glasgow City	1	3	1	1	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 and for food and non-food shopping, a good variety of shops/service was also key (35% and 41% 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	82	77	90	87	81
Variety of shops and services	35	41	7	7	5
Quality of shops and services	21	27	17	23	7
Good car parking	18	15	4	4	5
Good public transport	5	6	5	5	6
Quality of café/restaurants	0	0	0	2	35

Evening usage of town centre

5.22 Of the 150 shoppers interviewed, 33% 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 45% and prefer to go elsewhere 54%.

5.23 Table 5.23 shows the most commonly mentioned purposes of visiting the town centre in the evening. 47% of shoppers visited for pub/bar/night club and 49% for café/restaurants. Around one-third (33%) visit to use takeaway outlets.

Figure 5.23 Purpose of visits to town centre in evening

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

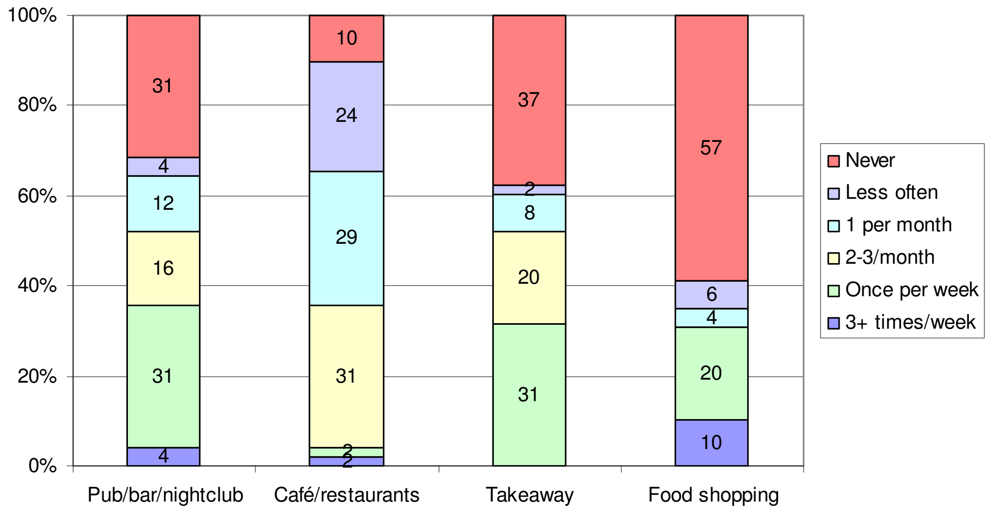
Base: shoppers visiting in evening	**49**
	%
Pub/bar/nightclub	47
Café/restaurant	49
Takeaway	33
Food shopping	24
Society/club	14

5.24 Shoppers were asked how often they visited different types of venues in the evening and results are shown for the most commonly mentioned purposes. 35% of shoppers visit a pub/bar/nightclub at least once a week, 31% visit a takeaway at least once a week and 64% visit a café/restaurant at least once a month.

Figure 5.24 Frequency of using town centre in evening

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

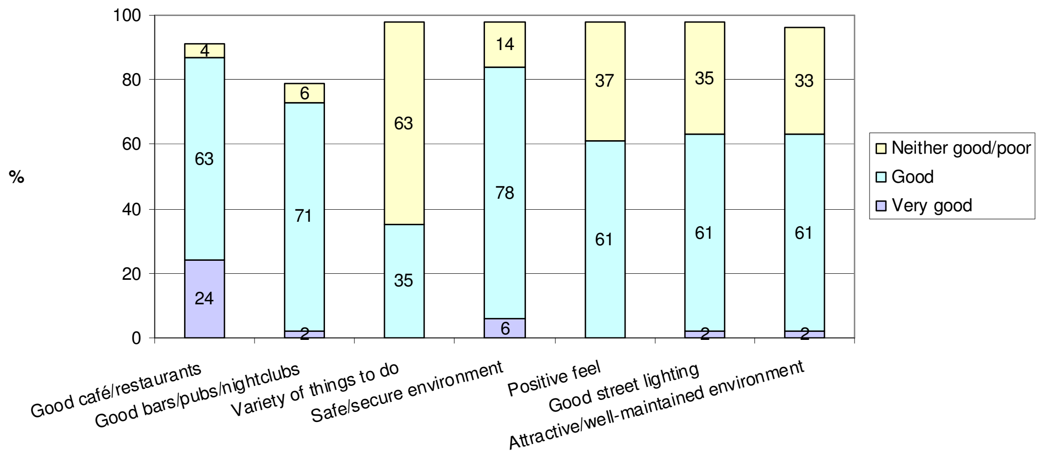
Base: 49 respondents



5.25 A list of attributes of 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. Table 5.25 shows those attributes which were rated generally positively (very good or good). Good café/restaurants was the only feature to receive a significant rating as **very good** (24%). Those attributes commonly rated as **good** were: good bars/pubs (71%) and safe/secure environment (78%).

Table 5.25 Attitudes towards town centre in evening

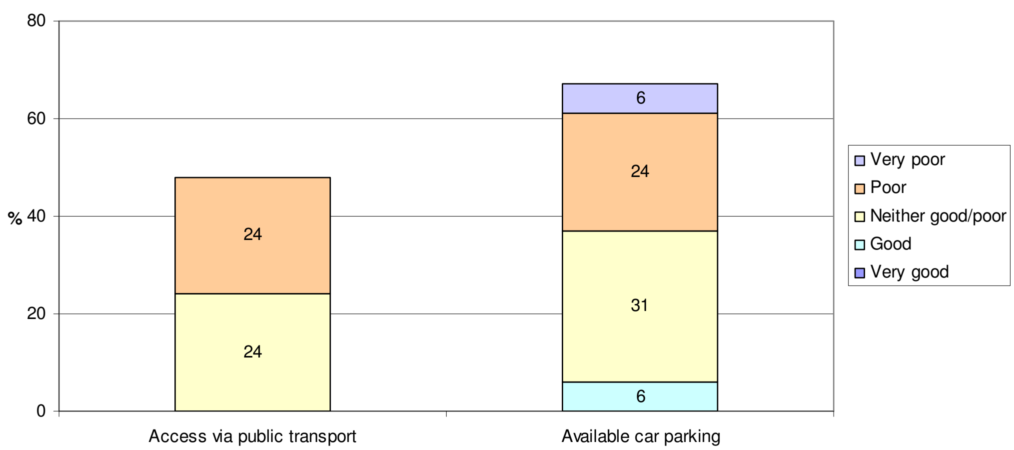
When you visit this town centre in the evening, how do you rate it with regard to these? Base: 49 respondents



5.26 Two attributes received higher ratings as being **poor/very poor**, both concerning access to the town centre in the evening: available car-parking (30%) and access via public transport (24%)

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: 49 respondents



6.0 TROON 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 working (50%) and 31% were retired.

Overall usage

The one main purpose for normally visiting Troon town centre was for food shopping (56%). Other purposes show a broader spread of reasons, including non-food shopping (77%), financial/professional services e.g. bank, solicitor (46%), professional health services e.g. doctor, dentist (31%), take away/sandwich shop (25%) and café/restaurant (19%). Residents are making regular visits to the town centre for shopping: 66% visit at least three times a week for food shopping and 43% for non-food shopping and the presence of these outlets is supporting usage of the town centre. The financial/professional service sector contributes to town centre usage, with 41% of residents using this at least once a week.

Frequency of usage of the town centre has been very stable in the past year (99% claiming no change in frequency of usage). About one-third walk, take the bus or drive into town respectively. The majority (85%) spend under 2 hours in the town centre, 15% less than one hour.

Purchase behaviour

The main purchase made or services used at residents' last visit to the town centre were food shopping (65%) and non-food shopping (40%). The total average spend in the town centre on residents' most recent visits was £24.58.

The key **main** reason for visiting residents visiting Troon was clearly the convenience of it being the closest main shopping area: 81% of respondents mentioned this when prompted and 76% spontaneously: *"Can get most of what I need", "Good size of town centre, not too busy".* **Other** prompted reasons included the quality of the shops/services (45%), variety of shops/services (24%) and good public transport (23%).

Attitudes and factors that would increase usage

The attributes in Troon town centre that were most commonly rated as **very good** were: price of car parking (34%), financial/professional services (20%) and a positive feel (19%). Those most commonly rated as **good** were: safe/secure environment (74%), retail services (72%) and food shopping (70%).

The rating of features as poor/very poor was low, reflecting the general positive perceptions of the town centre among residents. Features most commonly rated as **poor/very poor** were: provision of public toilets (29%), traffic congestion (19%) and traffic system (22%).

They key spontaneous category to improve shopper experience was improved shops/ services (85%): *"Better choice of shops", "More variety of food shopping"," cheaper shopping" "Competition for supermarket" "It's either charity shops or designer. Need something in the middle and cheaper food shops"*

The most popular prompted changes which would encourage increased use of the town centre were more large/chain stores (45%) and better variety of food stores (39%). When asked about the balance of types of outlets in the town centre, 45% of felt there were too many charity shops, 69% too few large/chain stores and 58% too few discount/pound shops.

Usage of different locations for shopping/services

The main location used for all types of shops and services by residents was Troon town centre. Ayr town centre is a support location and also Irvine town centre and Irvine, Rivergate. Closeness of a location as a main shopping area was the key reason for use; other common factors were the variety and quality of shops and services.

Evening usage of town centre

37% of residents visited the town centre in the evening and, of these, 54% are visiting cafés/restaurants and 80% pubs/bars/nightclubs.

Many features of the town centre in the evening were rated positively, including: good café/restaurants, good street lighting, safe/secure environment, positive feel and attractive/well-maintained environment.

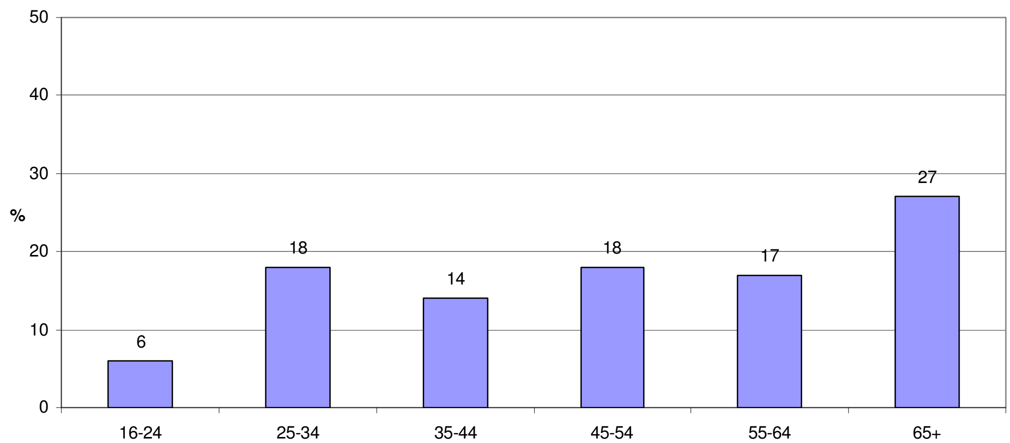
7.0 TROON RESIDENT KEY FINDINGS: TOWN CENTRE

Resident profile

7.1 There 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

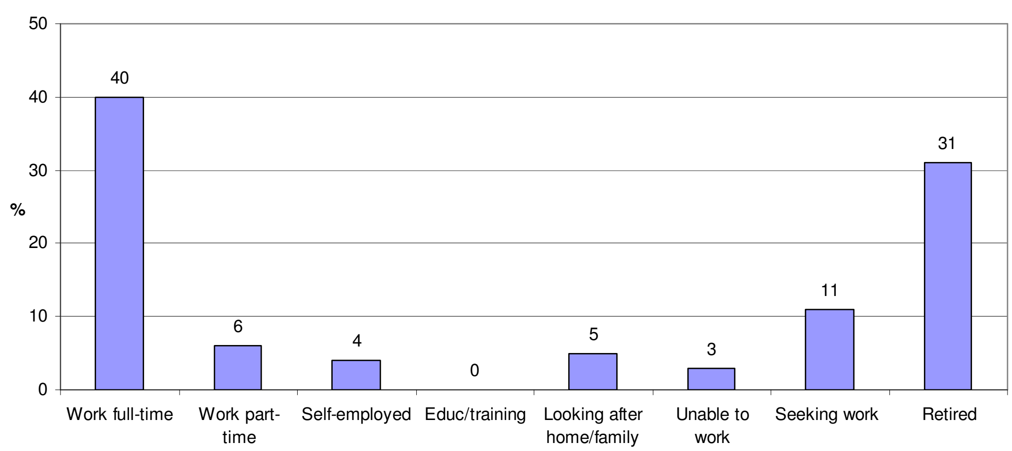
Into which of these age bands do you fall? Base 125



7.2 Analysis of the occupational status of the head of household for residents shows that 50% were working and 31% were retired.

Figure 7.2 Occupational status of head of household

Which best describes the current occupational status of your head of household? Base 125

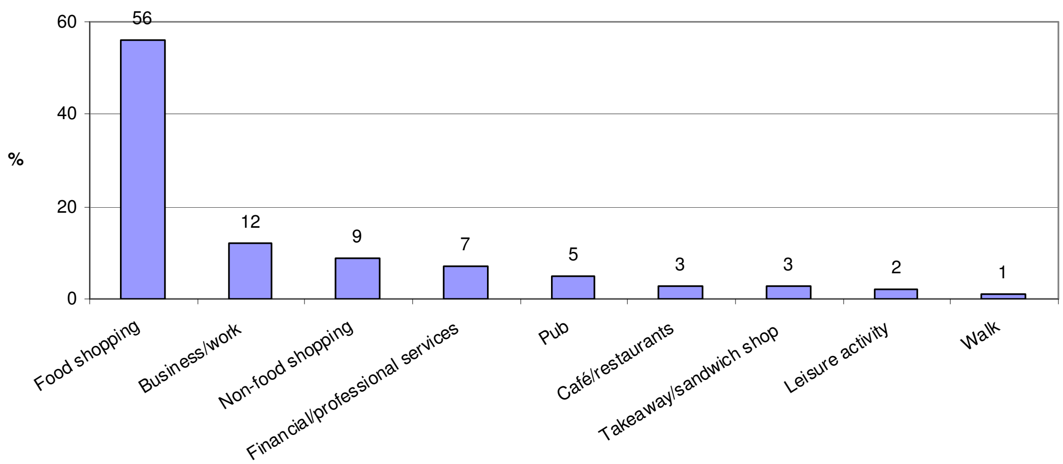


Overall usage

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 (56%).

Figure 7.3 Main purpose for normal visit

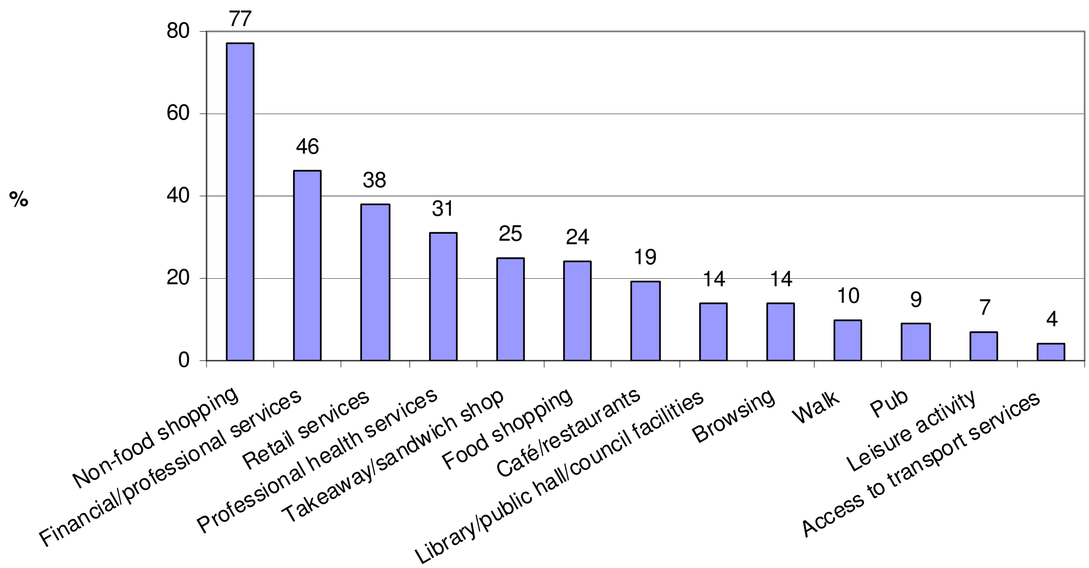
What is your MAIN reason for normally visiting this town centre? Base 125



7.4 Residents were then asked to select any **other purposes** for a normal visit and this generated a broader set of responses, in particular for non-food shopping (77%), financial/professional services (46%,) retail services i.e. hairdresser, shoe repair (38%) and professional health services i.e. doctor, dentist (31%).

Figure 7.4 Other purposes for normal visit

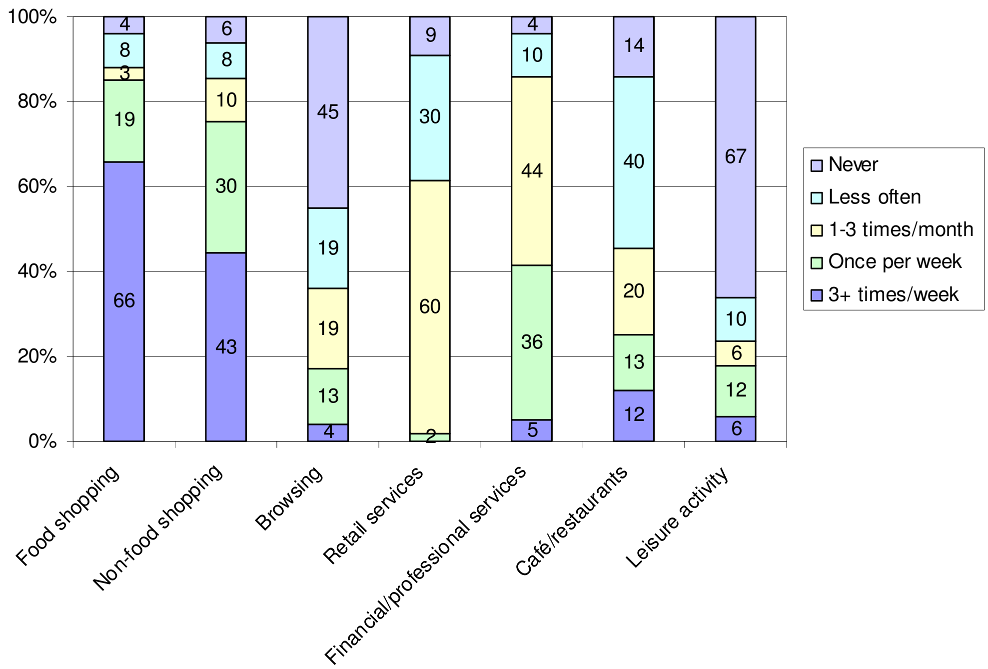
What OTHER reasons do you have for normally visiting this town centre? Base 125



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 shopping was highest: 66% making at least 3 visits per week for food shopping and 43% for non-food shopping. Financial/professional services were used at least once a week by 41% of residents and usage of café/restaurants at least once a week by 25%.

Figure 7.5 Frequency of usage

How often do you normally visit this town centre during the day? Base 125



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 99% 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: 125	
	%
More often	0
About the same	99
Less often	1

7.7 One-third (32%) respectively walk, drive or take a bus to town centre.

Table 7.7 Method of transport to travel to town centre

How do you normally travel to the town centre?

Base: 125	
	%
Walk	32
Car	32
Bus	32
Cycle	1

7.8 15% of residents normally spend less than 1 hour when visiting the town centre and a further 70% 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?

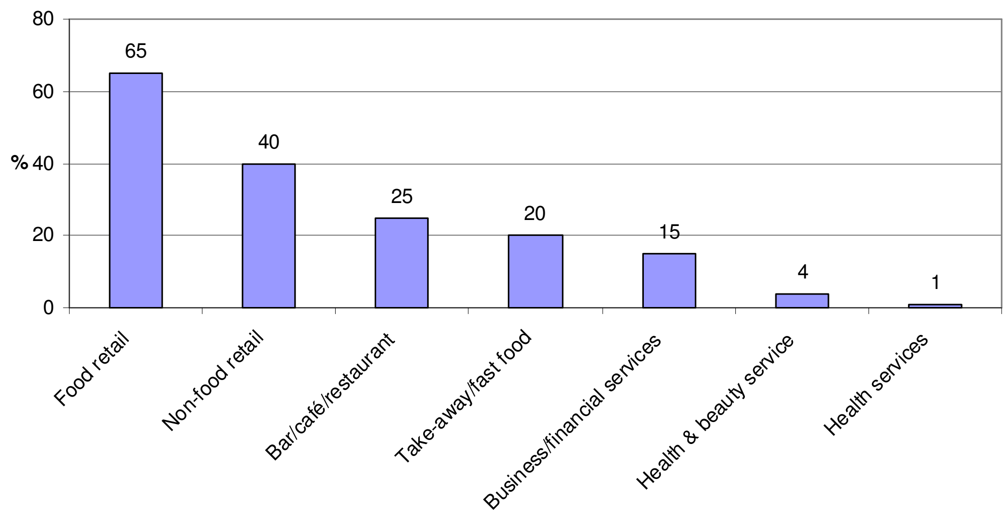
Base: 125	
	%
Less than 1 hour	15
1-2 hours	70
3-4 hours	13
5-6 hours	1
All day	0

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 was food shopping (65%) and non-food shopping (40%).

Figure 7.9 Types of shopping of services used

What did you buy/what services did you use? Base 125



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 each category purchased was under £10 and the total average spend on residents' last visits was £24.58.

Table 7.10 Average spend on last occasion

Business and Financial Services	£5.89
Bar/Cafe/Restaurant	£2.28
Retail (non-food)	£4.68
Retail (food)	£9.42
Takeaway and Fast Food	£0.60
Health Services (e.g. dentist, opticians)	£0.30
Health and Beauty Services (e.g. hairdresser, nail salon)	£1.41
Total	**£24.58**

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 (76%). 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: 117	
	%
Convenience generally	76
Positive to shops/service	6
Positive to people/friendly	2
Support shops/services	2
Closeness to work	13
Visit specific shop/service	1
General positive comments	3

Table 7.11.1 Example of verbatim reasons for using town centre

Reasons to use	**Town Centre**
Convenience generally	*"Closest to home when I'm not working"* *"Can get most of what I need"* *"Easiest to get to"* *"Good size of town centre. Not too busy"* *"Don't have to travel far"* *"I stay here; I was brought up here; I know everybody"*
Positive to shops/services	*"It's my branch at the bank"* *"It's my local shopping centre"* *"Like the variety of shops"* *"the local services are very good"* *"Try to support some of the local business"*
Positive to people/friendly	*"Good atmosphere in Troon"* *"Good feeling/plenty of friends"*

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 shopping area (81%). Other reasons showed a broader set of responses, including: quality of shops/services (45%), variety of shops/services (24%) and good public transport (23%)

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?

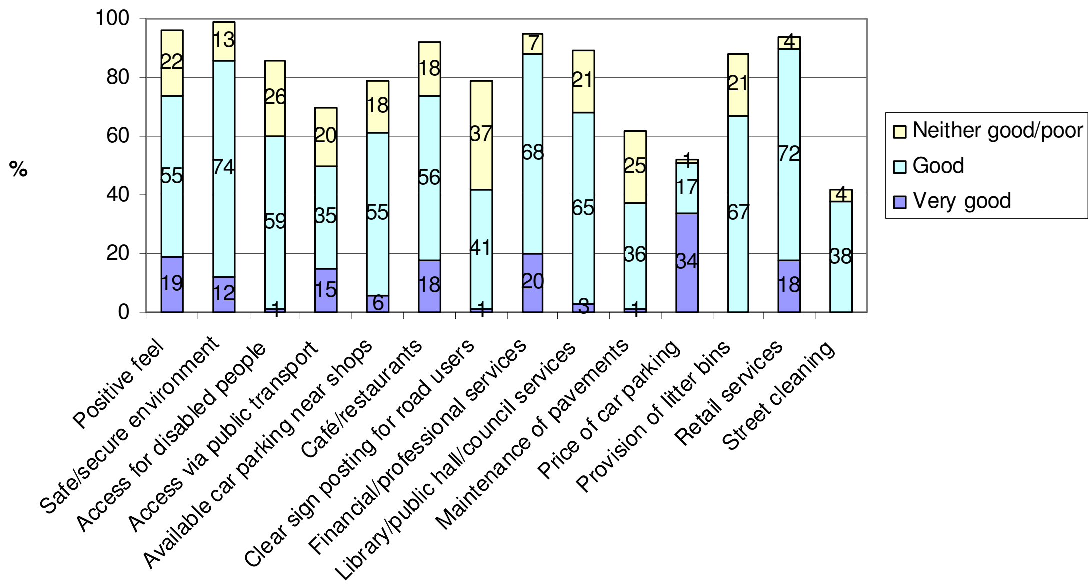
Base: 125	**Main reason**	**Other reasons**
	%	%
Closest main shopping area	**81**	7
Quality of shops/services	5	45
Positive feel to town centre	3	10
Good public transport	2	23
Attractive/well-maintained town centre	2	13
Variety of shops/services	2	24
Specific shop/service	1	3
Good car parking	1	5
Quality of café/restaurants	0	11

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 statements which were generally rated positively (**very good or good).** Features which were commonly rated as **very good** were: price of car parking (34%), financial/professional services (20%) and positive feel (19%) and features commonly rated as **good** included: safe/secure environment (74%), retail services i.e. hairdresser, show repair (72%) and financial/professional services (68%).

Table 7.13 Attitudes towards town centre

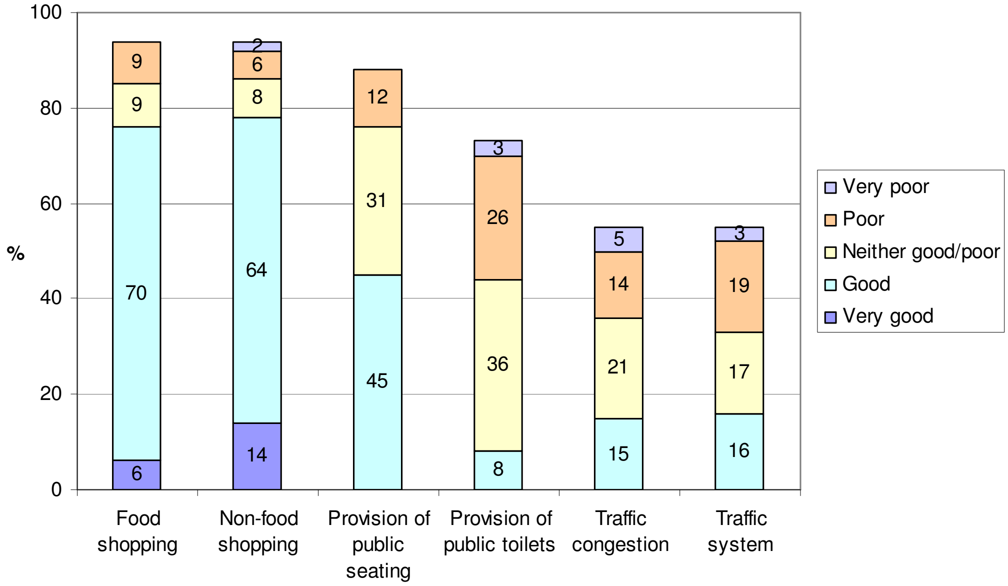
How do you rate this town centre with regard to the following? Base 125



7.14 Ratings as very poor were low overall; features rated higher as **poor/very poor** included: provision of public toilets (29%), traffic congestion (19%) and traffic system (21%).

Table 7.14 Attitudes towards town centre

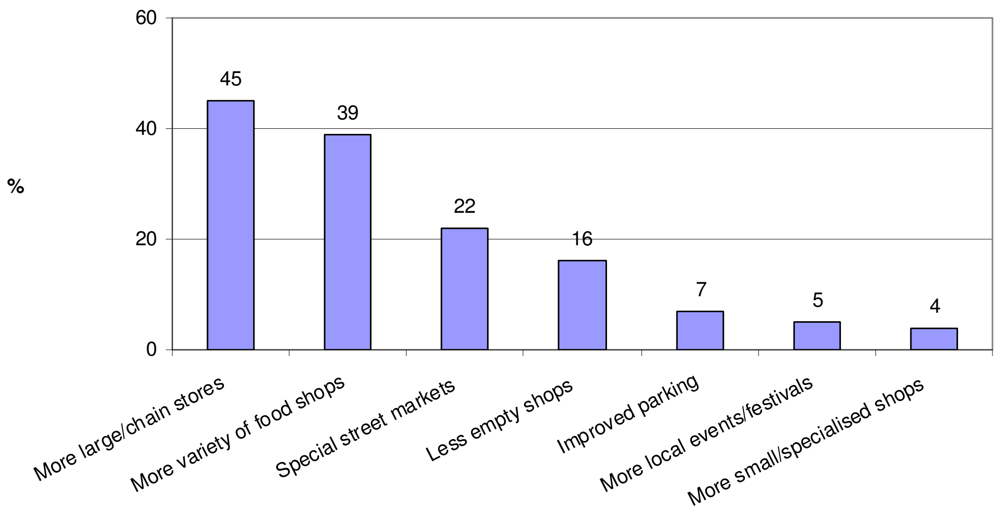
How do you rate this town centre with regard to the following? Base 125



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 suggested were: more large/chain stores (45%) and more variety of food stores (39%).

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 125

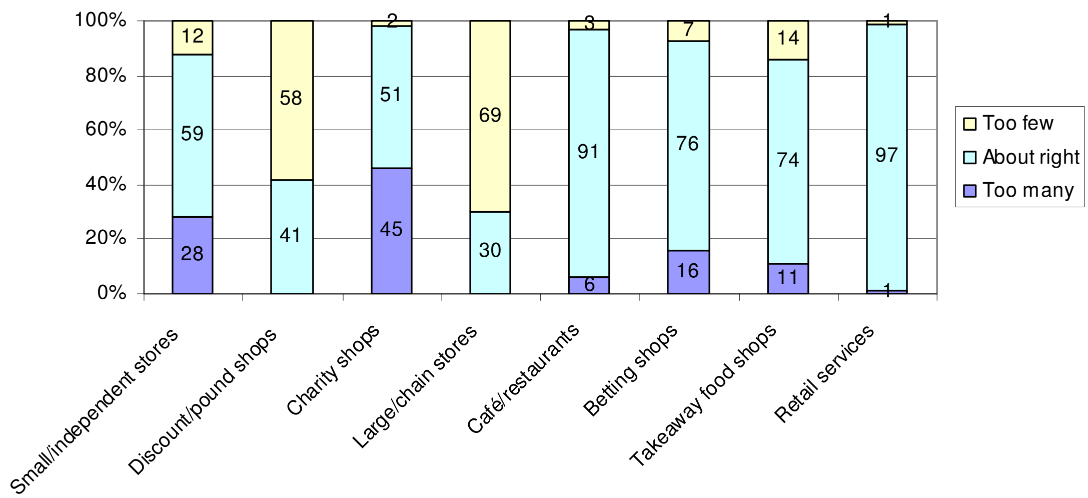


7.16 Residents were shown a list of different types of outlets in the town centre; for each they were asked if there were: too many, about right or too few. Generally the balance was about right; although 45% of residents felt there were too many charity shops, 69% felt there were too few large/chain stores and 58% too few discount/pound 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 125



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 (85%). 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: 82	**%**
Improvements to shops/services	85
Fill empty shops	7
Better/cheaper parking	4
Less traffic/improvements	2

Table 7.17.1 Example of verbatim reasons for improving town centre

Reasons to use	Town Centre
Improvements to shops/services	*"Another big supermarket"* *"Better choice of food shopping"* *"Better choice of shops"* *"More variety of food shopping"* *"Cheaper shopping. Poundshops"* *"Competition for the supermarket"* *"It's either charity shops or designer shops. Need things in the middle, and cheaper food shops"* *"Less charity shops; more young shops - it's all for old people"* *"Pound shop; another supermarket to compete with Morrisons"*

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. Table 7.18 shows the most commonly mentioned main locations. Troon town centre was the main location used by the majority of residents for shopping and services and a small proportion use Irvine Rivergate for food shopping (14%) and for non-food shopping (15%).

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 125

	Food	Non-food	Financial services	Retail services	Café/ restaurant
	%	%	%	%	%
Ayr, Heathfield	1	0	0	0	0
Ayr, Town Centre	5	9	3	3	4
Irvine Rivergate	14	15	0	1	2
Irvine Town Centre	4	4	3	3	5
Kilmarnock Town Centre	7	9	7	7	9
Troon Town Centre	**65**	**59**	**80**	**80**	**74**
Glasgow City Centre	3	0	4	4	4
Other	0	3	2	1	1
Not answered	1	1	1	1	1

7.19 Residents were then asked to select any **other locations** for shopping and services and responses are shown in Table 7.19. Results show that Ayr town centre was a key other location for services and shops, Irvine Rivergate was a key location for food/non-food shopping and Irvine town centre for services (financial and retail) and cafes/restaurants.

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 125

	Food	Non-food	Financial services	Retail services	Café/ restaurant
	%	%	%	%	%
Ayr, Heathfield	9	9	0	0	0
Ayr, Town Centre	31	33	34	31	36
Irvine Rivergate	38	37	10	6	10
Irvine Town Centre	15	17	30	29	32
Kilmarnock Town Centre	8	10	9	8	10
Troon Town Centre	12	23	9	7	10
Glasgow City Centre	3	7	3	6	6
Silverburn	7	7	1	4	7

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 main shopping area was the key reason to use a location; also variety of shops/services for food and non-food shopping and quality of shops/services overall.

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 125

	Food	Non-food	Financial services	Retail services	Café/ restaurant
	%	%	%	%	%
Closest main shopping area	70	67	79	77	71
Variety of shops and services	33	38	15	14	9
Quality of shops and services	30	31	38	39	14
Quality of cafes/restaurants	1	1	1	2	28
Good car parking	17	17	12	12	11
Good public transport	17	17	17	16	15
Attractive/well maintained environment	4	3	3	3	3
Positive feel	6	7	6	6	6

Evening usage of town centre

7.21 Of the 125 residents interviewed, 37% visited the town centre facilities in the evening and 63% did not. Those who did not most commonly gave the following reasons: no need/don't go out 65% and prefer to go elsewhere 35%.

7.22 Table 7.22 shows the most commonly mentioned purposes of visiting the town centre in the evening. 80% of those using town centre in evening visited pubs/bars/nightclubs and 54% visited café/restaurants.

Table 7.22 Purpose of visits to town in evening

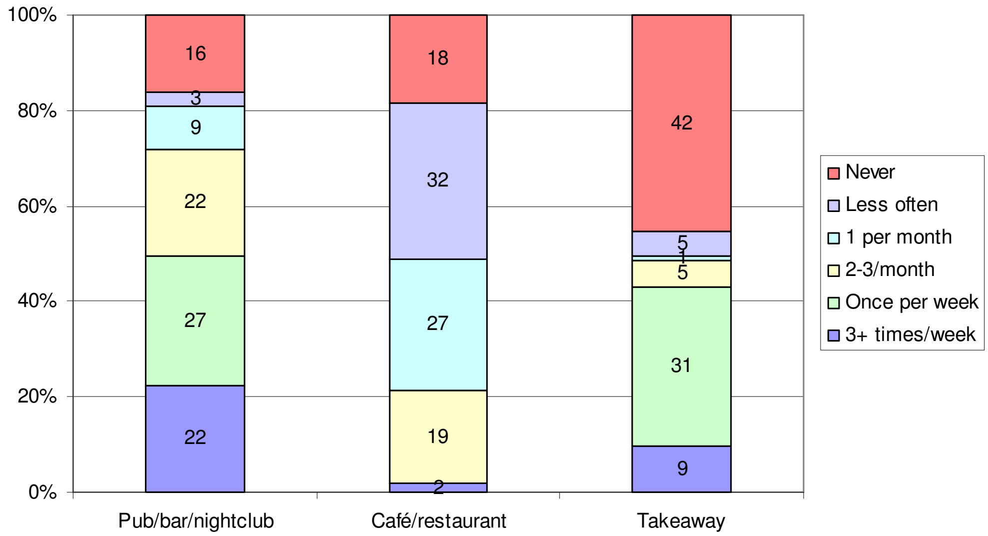
For what purposes do you visit the town centre in the evening?

Base: 46	
	%
Pub/bar/nightclub	80
Café/restaurant	54
Takeaway	60
Society/club	31
Food shopping	3
Church	2

7.23 Residents were asked how often they visited different types of venues in the evening and their frequency of visiting the most commonly mentioned purposes are shown below. 49% of residents visit pub/bar/nightclubs at least once per week and 40% visit takeaway at least once per week.

Table 7.23 Frequency of using town centre in evening

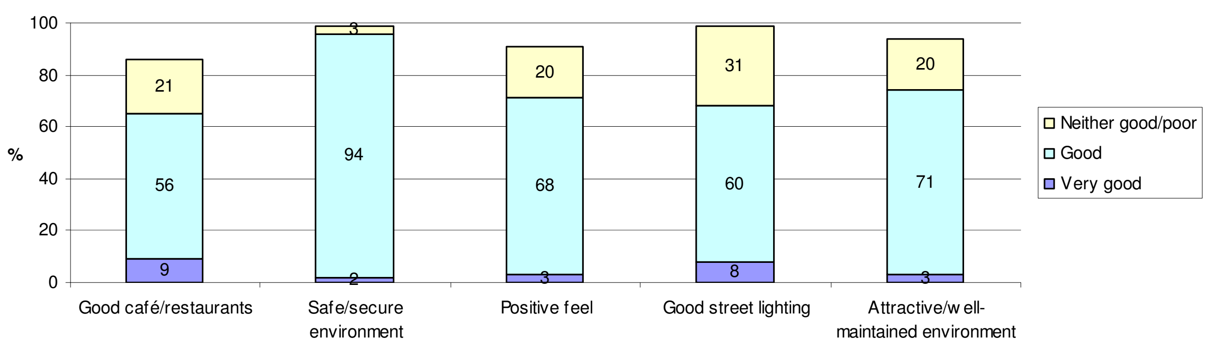
How often do you go into this town centre in the evening for these things? Base 46



7.24 A list of attributes of 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. Table 7.24 shows the statements most commonly rated positively (**very good/good**).

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 46



7.25 Only four attributes were rated by more than 5% of residents as **poor** and none were rated as **very poor**

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 46