



# Your Town Audit: Ayr

October 2016



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## 1. Understanding Scottish Places Summary

This report presents a summary of the Your Town Audit (YTA) for Ayr, conducted by Scotland's Towns Partnership and EKOS. The detailed YTA Framework and Data Workbook are provided under separate cover.

The YTA was developed to provide a framework to measure and monitor the performance of Scotland's towns and town centres using a series of Key Performance Indicators. It provides a comprehensive audit of Ayr with data on up to 180 KPIs across seven themes – Locality, Accessibility, Local Services, Activities + Events, Development Capacity, Tourism, and Place + Quality Impressions.

The [Understanding Scottish Places](#) (USP) data platform provides a summary analysis for Ayr and identifies six comparator towns that have similar characteristics, with the most similar being Kilmarnock, Kirkcaldy and Dysart, Kirkintilloch and Bathgate<sup>1</sup>. The USP platform - [www.usp.scot](http://www.usp.scot) - describes Ayr in the following general terms:

**Ayr's Interrelationships:** Ayr is an interdependent to independent town.

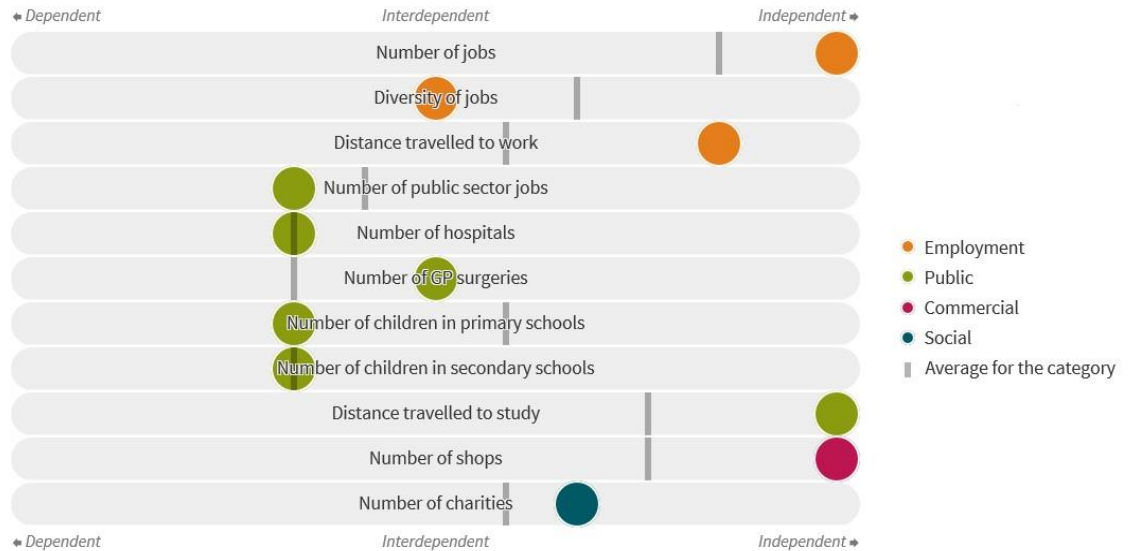
Interdependent to Independent towns have a good number of assets in relation to their population. They have some diversity of jobs; and residents largely travel shorter distances to work and study, although some travel longer distances. These towns attract people from neighbouring towns to access some of their assets and jobs.

**Ayr's Typology:** This type of large town is extremely mixed in terms of demographics. There is a particularly wide range of people, housing and activities. The number of older couples with no children is higher than average. There is a mix of professional and non-professional jobs, and part-time and self-employment are both important for a significant proportion of residents. Socioeconomic status is higher than in other kinds of town and there is a mix of professionals and non-professionals, those with higher and lower educational attainment.

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<sup>1</sup> The other comparator towns are identified as Inverurie and Dalkeith.

## Inter-relationships i

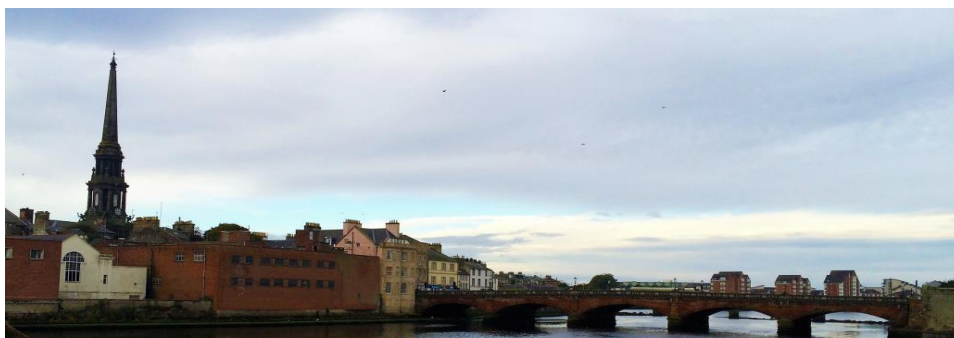


Comparing Ayr to towns with similar USP typology and interrelationships shows it has a similar number of hospitals and children in secondary schools. It differs in its number of jobs, distance travelled to study (both greater), diversity of jobs, and number of children in primary school (both lower).

Building on the USP, this report presents the results of our detailed analysis of Ayr based around the Scottish Government's [Town Centre Toolkit](#) – an online resource available via the USP website which provides advice, guidance and case studies across three thematic areas: accessible, active and attractive.

## 2. Accessible Town Centre

Ayr is an historic coastal town located 37 miles south west of Glasgow. It is the largest town in Ayrshire and the south of Scotland, and forms the administrative centre of the South Ayrshire local authority area.



The town acts as a retail and service hub for a wide catchment population and, along with the surrounding area, is popular with visitors. In 2009, South Ayrshire attracted 1.2m tourists between January and September, just over half of them day visitors. Ayr's esplanade and sandy beach are easily accessible from the town centre, and the beach has been awarded Blue Flag status by Keep Scotland Beautiful each year since 2012.

The town is well connected by bus and train to central Scotland and the wider Ayrshire area, and is around 4 miles south of Prestwick International Airport. The train station is located on the eastern edge of the town centre, and the bus station more centrally; both are a short walk from the main retail area. Trains to Glasgow take around 50 minutes and run half hourly.

Bus and train services from Ayr, connect the town with other settlements in South Ayrshire such as Troon (35 minutes by bus and 15 minutes by train), Prestwick (15 minutes by bus and 5 minutes by train), as well as towns in North Ayrshire such as Irvine (40 minutes by bus and 20 minutes by train) and Kilwinning (55 minutes by bus and 20 minutes by train).

There are a number of on-street parking spaces found in the town centre, as well as a number of off-street car parks which include those located at: the Kyle Centre (360 spaces), Ayr Central (450 spaces), TK Maxx car park (300 spaces) and Boswell Park (210 spaces). Parking, both on-street and off-street, must be paid for, with the costs ranging from 50p per hour to £1 per hour for off-street car parks, and from 30p for 30 minutes to £1.80 for 3 hours for those parking on-street, with a maximum stay length of 3 hours.



Accessing the town centre is relatively easy, as there is an appropriate level of signage for those travelling by foot, car or bike. The pavements and roads in the town centre are in good condition and there are few pot-holes. There are also plenty of pedestrian crosses and traffic lights throughout the town.

The town centre provides access to local services which, alongside a mix of retailers and business services, includes a library, five town/community halls, the local primary and secondary schools, two churches (Holy Trinity Episcopal Church and Free Church of Scotland), and the nearby train station. There is 3G and 4G throughout the town, and although there is no town-wide free WiFi, superfast broadband is available.

### 3. Active Town Centre

#### 3.1 Population and Housing

Ayr has a population of around 49,300 people, having increased by less than 1% over the past decade. Around 800 people, 2% of Ayr's total population, live within the town centre area<sup>2</sup>. Over the last decade, the town centre population has increased by 13%, with the whole settlement increasing by less than 1% over the same period. This compares with average increases of 1% and 5% for South Ayrshire and Scotland respectively over the past ten years. Most of the YTA audited towns have seen a marked increase in town centre living, averaging 7%; this is more pronounced in Ayr.

Almost 90% of all housing within the town centre<sup>3</sup> is in flatted accommodation, although tenure is split between private ownership (40%), private rented (31%) and social rented (29%). At 4.4%, the town centre has a higher housing vacancy rate than Ayr as a whole (2.4%). This is similar to the vacant housing stock found in Hamilton and Musselburgh but higher than Barrhead – 4.2%, 3.0% and 2.0% respectively.

Over two-thirds (68%) of houses in Ayr town centre are in council tax bands A, B and C. The streets surrounding the town centre shopping streets are almost solely residential – a mix of detached / semi-detached properties and flats – these provide a large catchment population for the retail and service businesses.

The average purchase price of a town centre dwelling in Ayr (£96,198) is lower than that of the town as a whole (£169,130)<sup>4</sup>. Prices in the town centre increased 34% in the decade to 2013, and by 50% in wider town. In comparison with other YTA audited towns Ayr has both a lower average price – £113k from 22 YTAs – and a lower average ten year increase – 44% from 22 YTAs.

There is, however, significant variation across the audited towns (from £55k to £200k average price for town centre properties), including £85k in Barrhead, £69k in Dumbarton, £128k in Hamilton, £122k in Kirkcaldy, and £124k in Musselburgh.

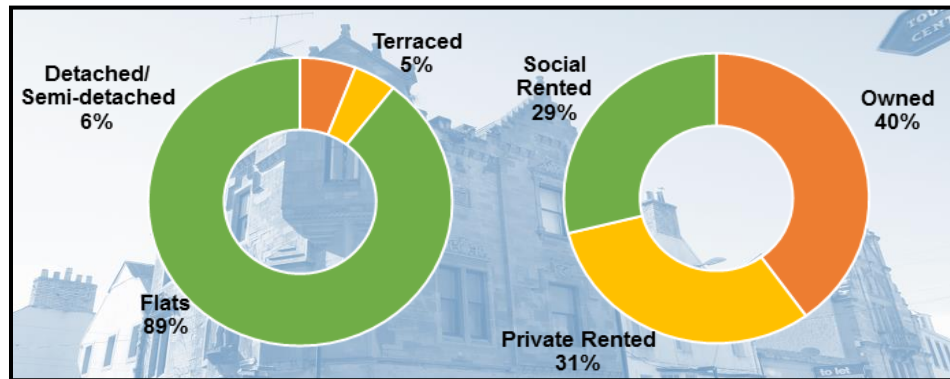
<sup>2</sup> 2011 Scottish Output Zones: S00129996, S00129303, S00129304, S00129305, S00129876, S00129314, S00129312, S00129310, S00129899 and S00129473.

<sup>3</sup> For accessing the most up to date data, this is datazones (2001) S01005585, S01005589 and S01005590.

<sup>4</sup> Scottish Statistics, 2013



Ayr has a higher proportion of second / holiday homes than most towns – at 6.3% this equates to 133 units within Ayr town centre and just under one-third of the total second / holiday home stock within the whole town. The average across 23 YTAs is 2.2%, with Alloa being the only YTA town where a higher rate has been identified, at 6.6%.



### 3.2 Town Centre Employment and Business

The town centre plays an important role in the economy of Ayr, with 25% of the town's jobs located within it. Ayr has a lower average number of jobs per town centre business than its two comparators (Kirkcaldy and Hamilton), with a larger proportion of smaller employers – Ayr has around 11 employees for each town centre business identified, much lower than Kirkcaldy (17) and Hamilton (27).



This correlates with the USP analysis which shows that when compared to similar towns Ayr has a lower proportion of public sector jobs, which tend to be concentrated in larger sized operations, but also reflects the higher density of retail outlets per head of population.

Across 23 YTAs the average is 224 town population per retail unit – as a recognised tourist/ day visitor destination it is unsurprising that Ayr has a lower rate, but somewhat surprising that it is not lower than it is. The lower the rate, the more the town’s retailers rely on spend from out with the town itself – other YTAs that have significantly lower rates include Moffat (51 residents per retail unit), Stornoway (88), Musselburgh (173) and Alloa (180).

### 3.3 Town Centre Retail

The core retail area is focused on the High Street, which runs through the town centre and has the two shopping centres facing on to it and connecting to adjacent streets. However, Ayr has a particularly high number of shop units for a town of its size (significantly higher than any of the other audited towns, average = 88 retailers from 24 YTAs), and retailers are scattered through a large town centre area. A small area to the north of the river is included within the town centre boundary, taking in an Aldi supermarket, a number of independent traders and a large TK Maxx outlet with its own 300-space car park.



While still a large commercial centre, Ayr’s retail performance has been in decline over recent years. The YTA audit found that 16% of retail units in the town centre are vacant, which is the same vacancy rate concluded in the 2015 audit. The average vacancy rate across 23 YTA towns is 9.2% – four small towns have 0%, those with higher than average rates include Hamilton (13%), Kilmarnock (15%), Dumbarton (16%), Kirkcaldy (17%), and Alexandria (19%).

Areas within Ayr that have high levels of vacancy include the Kyle Centre<sup>5</sup> (24% vacancy rate), the upper end of High Street and sections of Newmarket Street, although there are significant numbers of vacant units located across the town.

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<sup>5</sup> The Kyle Centre has recently been acquired and is under new management.



It is important to note that Ayr Renaissance is leading a major long-term project to redevelop the block to the north of High Street and, as such, has acquired eight retail units, five of which are vacant and are in very poor condition. The redevelopment of this block will remove obsolete retail units, create a new anchor for this part of the town centre, and significantly improve the town's appearance at a key entry point.

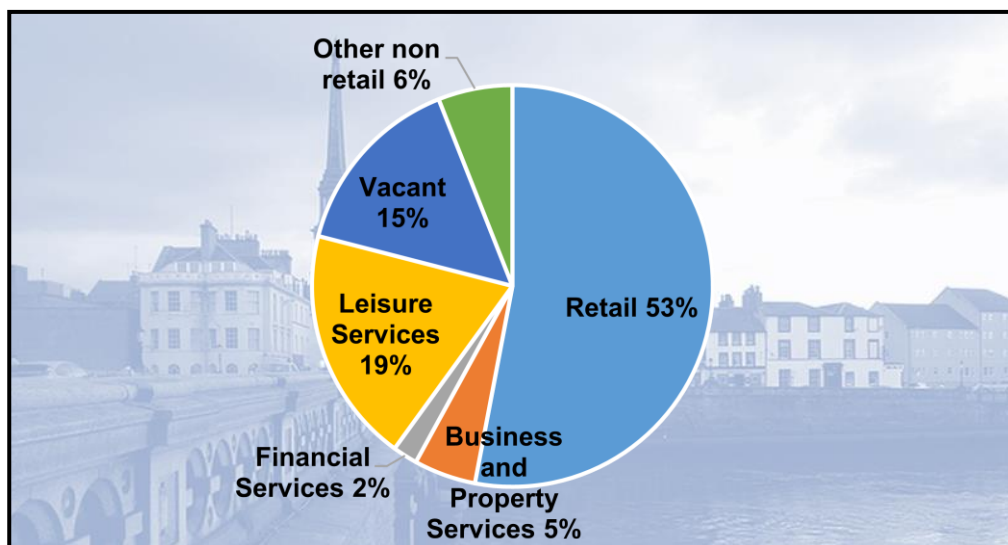


It is also helpful to note that while Ayr has a high vacancy rate there does appear to be some level of churn in the town centre – with 3% of the units changing occupiers since 2015, and 3% of the units which were recorded as vacant in 2015 now being occupied. However, 80% of the vacant units recorded this year were also vacant during the June 2015 audit of the town centre area.

This suggests that the areas in which there seems to be high levels of vacant units needs to be addressed.

Shops located at the Heathfield Retail Park, to the north of Ayr, typically open until 8pm Monday to Saturday and 6pm on Sundays. Within the town centre, larger traders generally open 7 days a week until 5pm or 6pm, with slightly later closing on Thursdays and shorter hours on Sundays. This is comparable with trends in other large traditional towns, but with a relatively large catchment from residents and visitors there may be greater opportunity to extend town centre opening hours.

**Town Centre Unit Mix**

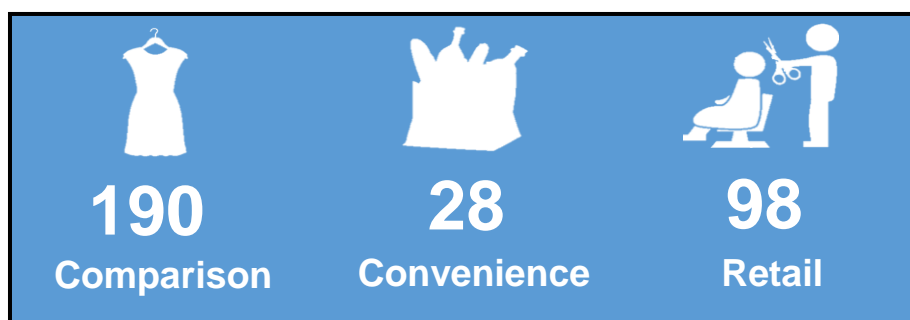


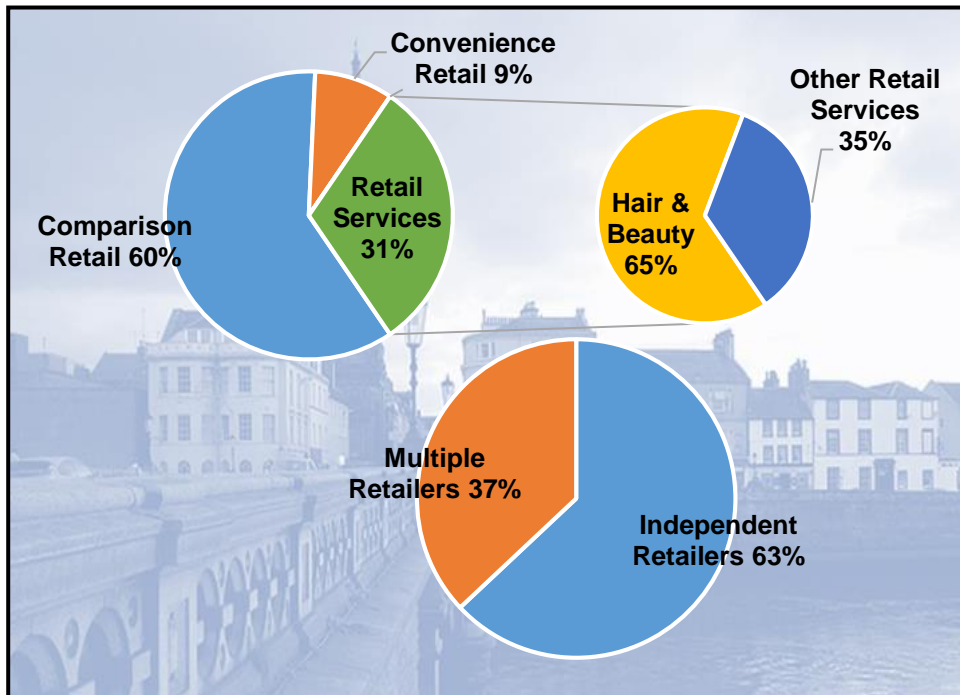
Ayr town centre is dominated by retail, which accounts for 53% of relevant units (average 46%, 24 YTAs). The town has an impressive and varied range of independent retailers, including many niche and high-end traders, alongside a broad assortment of national chains. Key anchors include Marks and Spencer, Debenhams, BHS, TK Maxx and Primark.

In 2014, the Royal Society for Public Health rated Ayr as having the second healthiest high street in the UK, using a method that involved rating its incidence of “health promoting” businesses against those which are “potentially harmful to health”.

The YTA analysis is based on the following retail definitions:

- **Convenience Retail:** primarily low cost goods that are typically bought out of habit or on impulse i.e. food, drink (alcohol and non-alcohol), news, tobacco, etc. – *28 convenience retailers were identified in Ayr town centre;*
- **Comparison Retail:** all other retail purchases comprising goods bought at infrequent intervals where consumers will compare and contrast products and prices – *190 comparison retailers were identified in Ayr town centre;* and
- **Retail Services:** services that consumers would expect to find in a town centre including hairdresser, beauty salon, repair of goods, hire of specialist clothing, health clinics, post office, travel agent, etc. – *98 retail service operators were identified in Ayr town centre.*





Just under two-thirds of retailers (63%) in Ayr town centre are independently operated, with 37% part of a larger chain. Independent traders are spread throughout the town, although with particularly high concentrations in the Arran Mall, Alloway Street, Newmarket and Sandgate. Multiples are, for the most part, clustered on High Street and within Ayr Central shopping centre.

The proportion of independent retailers is marginally below the average for YTA audited towns (68%, 24 YTAs), and while the proportion of comparison retailers (at 60% in Ayr) is significantly higher than the average (42%, 24 YTAs) it is only marginally higher than comparable 'district centre' towns – Hamilton and Kirkcaldy (both 58%), and Kilmarnock (54%).

### 3.4 Town Centre Delivery

Although Ayr does not have a formal Business Improvement District (BID), the town received a significant injection of ERDF funding in late 2014 to deliver town centre improvements along the lines of the BID model. The Ayr Town Centre Steering Group was formed and has pursued a range of projects, including street entertainment in the run up to Christmas, a business, residential and shopper survey, and the installation of footfall counters at three locations. Footfall numbers have, however, not been updated since November 2015 when the average four-week footfall was 791,081. In 2015, nine vacant properties benefitted from having window vinyls installed, an effort to improve the overall appearance of the town centre.



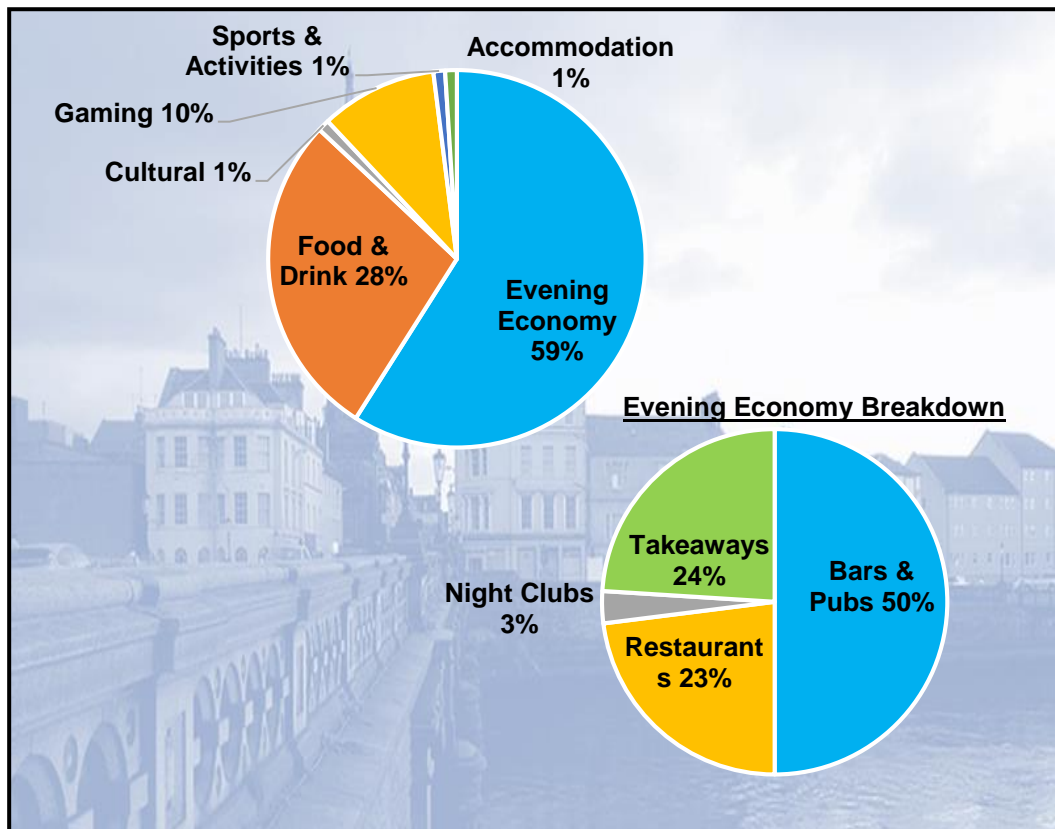
Ayr Renaissance is an arms-length organisation, wholly owned by South Ayrshire Council, tasked with overseeing the regeneration of Ayr town centre and the preservation of its historic townscape. Ayr Renaissance co-sponsor the Mi-Ayr mobile app and website, which promotes local businesses through special offers and discounts that are available through the app. This was launched in early 2014.

Ayr Renaissance is also currently overseeing the Riverside Development of a particularly large area of High Street, which at present is vacant and does little to improve the empty feeling of the town centre. The redevelopment of the Riverside Block is an opportunity to expand commercial office provision in the town centre accommodating workers who will make use of the town centre's retail and leisure offer.

## 4. Attractive Town Centre

### 4.1 Leisure Mix

The leisure offering in Ayr town centre is largely made up of evening economy uses (59%). There is one cinema within the town centre, along with the Gaiety Theatre. The Citadel leisure centre is located near the waterfront, within walking distance of the town centre. An ice rink is located to the north of the town, although is primarily used for curling / sports and is not open for public use. A bowling alley is located on Miller Street on the southern edge of the town centre.



While Ayr has the highest number of evening economy outlets of all the completed YTA audited towns – at 68 outlets – it makes up a comparable proportion of the total make-up of the town’s business base (11% in Ayr, 12% average 22 YTTAs).



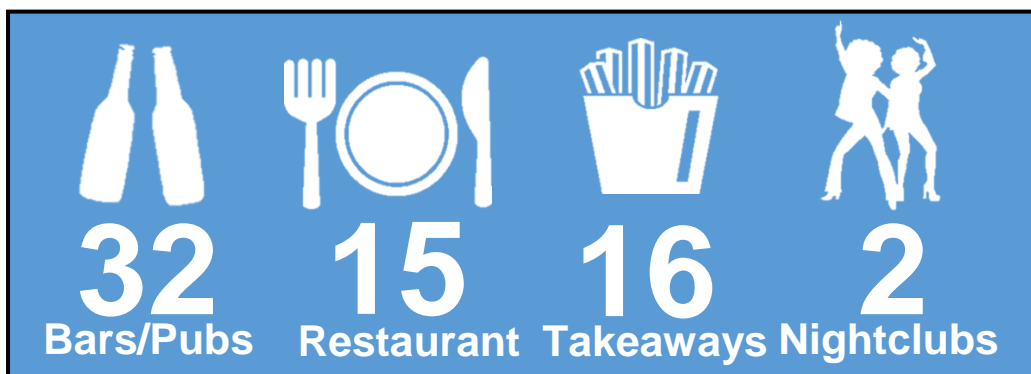
The Dansarena Studios, located within the town centre of Ayr, is a facility used for dance tuition. The studios moved into the over 200 year-old Cathcart Church thirty years ago and has four dance studios. A number of adult and children dance classes are run throughout the week, teaching different dance styles. The company also put on a number of events and workshops throughout the year.

Recently the Gaiety Theatre (a category B-listed building) re-opened following a £2.4m restoration which saw the 1902 main auditorium refurbished and updated to include new seating and wheelchair accessible spaces, new lighting, sound equipment and a more modern stage. Other new features include an upgraded ticket booth, remodelled entrance foyer and back of house facilities.



Photo via Flickr user John Lord [under terms of licence](#)

Ayr town centre has a strong night time economy offer – consistent with its profile as the market town serving a wide catchment across South Ayrshire and beyond. Half of the evening economy in the town centre of Ayr (50%) is comprised of bars and pubs, with a further 24% being Takeaways and 23% being restaurants. There are only two nightclubs in Ayr – Madisons on Carrick Street and Club de Mar on Arthur Street. On Friday and Saturday night, the taxi rank at Smith Street is marshalled. A traffic restriction order is in place on Boswell Park – the centre of Ayr’s night time economy – during the early hours of the morning on these nights, with access limited to taxis and emergency vehicles.





## 4.2 Events and Attractions

Established in 1999, Ayr Farmers' Market was one of the first in Scotland, and the same group of suppliers have now expanded their operations, with the market held in a different town in the west / south of Scotland each weekend. In Ayr, the market is held on the first Saturday of each month and typically has around ten stalls offering a range of high quality local produce. In July 2015, the farmers' market



moved from its usual location behind the Kyle Centre to a more prominent site at the bottom of High Street, in a bid to attract a higher level of footfall. With footfall of around 35,000 – 40,000 in the town centre on a Saturday, there is perhaps scope to increase the number of stalls at the market, which, at ten, is very small for a town of Ayr's size.

The audit did not find a large provision of fresh food available in the town's retail outlets – no fishmonger, no deli, one greengrocer and three butchers. The market could be further enhanced through the redevelopment of the adjacent Corn Market building on High Street as an indoor-outdoor trading environment for local producers and businesses on the ground floor. On Sundays, a car boot sale is held in the grounds of Ayr Racecourse. This is organised by South Ayrshire Council.

Ayr Racecourse is a key attraction, with 30 race days a year, including the Scottish Grand National. The racecourse is located to the north-east of the town and, with the exception of a large Tesco supermarket, is largely surrounded by residential units, so there are limited spin-off benefits for town centre businesses. This is also the case with Somerset Park, the Ayr United football ground, and Northfield Bowling Green, the headquarters of Bowls Scotland and where national events are held.

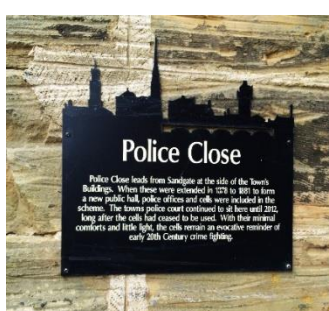


Photo via Flickr user Ian Ferguson, [under terms of license.](#)

The quickest route from the main railway station to the stadium, bowling green and racecourse – along Station Road – avoids the town centre entirely. Those travelling by coach or car, particularly from the central belt, do not need to travel into the town centre to reach these venues.

Similarly, other key attractions, including the Craig Tara caravan park, the NTS Roberts Burns Birthplace Museum (rated five stars by Visit Scotland) and Heads of Ayr Farm Park (four stars) are located on the southern outskirts of the town.

In early 2015, a UK Government Coastal Communities Fund award of £100,000 was granted to Ayr Renaissance, and used to develop a tourist trail through the town centre, which focuses on the town's historic sites.



While Ayr hosts a wide array of cultural and community events each year, many of which are high profile, these are typically held out with the town centre i.e. at the racecourse or Rozelle Park. However, the Scottish Air Show, which attracted around 120,000 visitors to the town throughout the event in September 2016. The event was held at Low Green, just at the edge of the town centre boundary, creating an opportunity to attract additional footfall and spend into the town centre area.

### 4.3 Historic Town Centre

Ayr has been an important market and trading town for 800 years and boasts an impressive historic realm, including the Auld Kirk building which dates from 1654. Despite the town's heritage, however, there are no historic properties operating as visitor attractions in their own right within the town centre.

Most of the town centre is covered by two conservation areas, which contain a high number of listed buildings, which includes 15 Category A listed buildings.

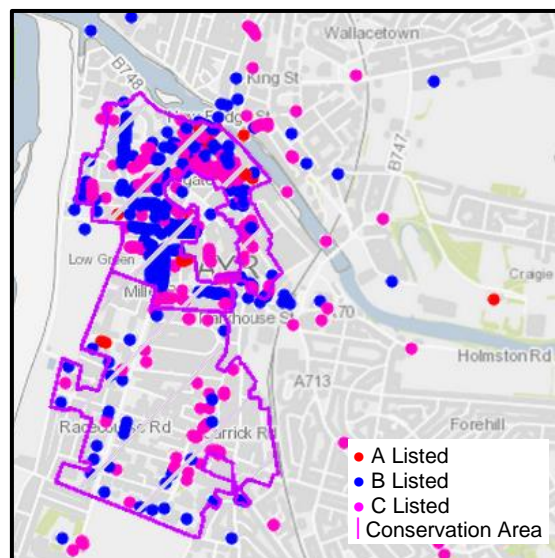




Photo via Flickr user Aaron Bradley [under terms of licence](#)

There are also a number of buildings in Ayr which find themselves on the Buildings At Risk Register. There are 21 at risk buildings in Ayr, with 16 of these being located throughout the town centre area. One of the buildings in the town centre which is now at risk is the Station Hotel, which is located next to Ayr train station and occupies a very large area of land. The building which dates back to 1885 has been vacant since 2013 and was moved to the at risk register in 2014 due to the building being of a very low

condition in some areas. In 2016, repair works began with the erection of scaffolding to the front of the building to allow for repair works.

Another building on the register is the Orient Cinema, which dates back to 1932. The building has been on the register since 2009. During this time the building was purchased by an Ayr motor company who, it is understood, redecorated the front of the building in 2014. However, the building itself is understood to still be unused.



#### 4.4 Comparison

The USP data platform identifies Kirkcaldy as one of the most similar towns in Scotland to Ayr. Both are mid-sized coastal towns with populations of just under 50,000, and similar drive times to the nearest major city, giving them much the same level of independence/ interdependence. The towns differ in terms of the total number of units, with Kirkcaldy recording 396 in the town centre area and Ayr 600. However, the split between uses within two towns are very similar: Retail (Kirkcaldy 54%, Ayr 53%), Leisure (Kirkcaldy 14%, Ayr 19%), Financial Services (Kirkcaldy 3%, Ayr 2%), Business and Property Services (Kirkcaldy 4%, Ayr 5%), and Other Non-Retail (Kirkcaldy 9%, Ayr 6%). Both towns recorded similar high levels of vacant retail units (Kirkcaldy 16%, Ayr 15%).

## 4.5 Place and Quality Impressions

Ayr town centre scores well against Place + Quality Impression KPIs, with clean streets, good pedestrian access, a good range of retailers alongside leisure uses, high quality street furniture and a sense of safety/security in the town centre. Signage in the town centre is also clear, with pedestrian signposts that fit well with the area's historic realm.

Business confidence this year is again higher than other locations where YTA audits have been undertaken – most businesses (56%) reported some level of confidence about their future performance, even where they had a decrease in turnover over the past five years.

The appearance of shop fronts averaged 6.7/10 and shop windows 6.8/10, although the former was brought down by a relatively high level of vacant units, which while well maintained on some streets, on others did detract from the appearance of the nearby townscape. These scores are similar to both Hamilton and Kirkcaldy, but slightly below the YTA averages across 22 town audits.





## 5. YTA Summary and Key Points

The following are offered as final comments on the Your Town Audit of Ayr within the framework of the Scottish Government's Town Centre Toolkit.

### 5.1 Accessible Town Centre

- Ayr is well connected with transport links and a range of services. Although car ownership in the area is high, public transport links are good with regular bus and train services travelling to Glasgow, North Ayrshire and other settlements in South Ayrshire;
- the new Ayr Town Trail will improve the connection between the seafront and the town centre and is intended to increase footfall and economic benefits for town centre traders – it is important that this is maintained and refreshed in the future as required;
- there is good access to financial services with a number of registered banks in the town centre area of Ayr, as well as ATMs throughout;
- parking in Ayr town centre on the street is limited, however, there are approximately 10 off-street car parks which provide the town with 1,900 spaces. This helps draw visitors to the town centre, even on busy weekend days; and
- Ayr has good 3G/4G mobile coverage and access to superfast broadband.

### 5.2 Active Town Centre

- Ayr has a high level of independent retail businesses – this helps to maintain the town's uniqueness;
- 6% of retail units had changed occupiers or changed from being vacant to occupied between the June 2015 and October 2016 audits, this suggests some level of churn within the town centre area.
- there were 92 vacant units recorded during the audit of Ayr. Of these properties 80% were also recorded as being vacant in June of 2015. This suggests that these units are not attractive to occupiers, however, more needs to be done to understand why this is the case;

- the completion of the Riverside Development involving a number of vacant units on High Street, will help the town centre to feel a lot less 'empty'; and
- there is a wide range of events and activities on offer in both the town centre and wider town e.g. Tamfest, Scottish Airshow and Ayr Flower Show, which help bring people to the area. These activities are important to attract footfall for town centre businesses and encourage repeat visits.

### 5.3 Attractive Town Centre

- the town centre of Ayr is attractive and manages to retain a sense of uniqueness due to the high number of retail units being occupied by small and independent businesses;
- the redevelopment of the Riverside block will remove vacant / derelict properties, create attractive new public space and allow development of high quality new property;
- events and activities such as the Ayr Races and Scottish Airshow help to retain the vibrancy of the settlement and bring in extra footfall and trade; and
- as with last year, business confidence was again high, with 56% of businesses very confident/confident about their future. This is promising as it suggests that business owners feel assured of the longevity of the town centre area.