

**AYRSHIRE JOINT PLANNING STEERING GROUP  
25 NOVEMBER 2010**

---

**Retail Capacity Assessment**

---

**PURPOSE OF THE REPORT**

1. To advise and update the Steering Group on the work being undertaken to prepare sub regional retail capacity assessments across Ayrshire and to provide details of the town centre monitoring work.

**RETAIL CAPACITY ASSESSMENT**

2. The approved Joint Structure Plan retail strategy was supported by a Retail Capacity Assessment undertaken in 2005. This type of study provides an estimate of the likely future potential demand for additional retail floorspace which local development plans should seek to accommodate within town centres or other appropriate retailing locations.
3. The 2005 study was prepared prior to the economic recession of 2007 and is considered to be out of date as a consequence of the changed economic circumstances and new retail development that has occurred since the capacity assessment was undertaken. An updated capacity assessment is necessary to provide evidence to support the preparation of the new local development plans.
4. The work undertaken to date includes the commissioning and analysis of the Ayrshire Household Shopping Survey 2009, a survey of existing retail floorspace and the purchase of relevant data including the Mintel Retail Rankings and household expenditure estimates.
5. Unlike the previous capacity assessment, which was carried out at local authority level, the revised assessment is seeking to estimate capacity at a sub regional level.. This has required a significant amount of additional analysis of the data from the household shopping survey compared to the previous methodology and the resolution of a number of data quality issues associated with the lower geographic scale of the analysis. Consequently, whilst it had been intended to complete the study in time for this meeting of the Steering Group, this has not proved possible. It is anticipated that the work will be complete by the end of December and disseminated to the individual Councils thereafter.

## STUDY OF CHANGES IN TOWN CENTRE FLOORSPACE

6. Part of the evidence based required to undertake the retail capacity assessment is a survey of all existing retail floorspace. A detailed survey of retail floorspace was carried out by the Joint Planning Unit in 2004 for the preparation of the 2005 capacity assessment. Following this initial survey, more detailed surveys were undertaken in 2006, 2008 and 2009 which looked at all town centre uses (excluding residential). This detailed level of monitoring, allows for examination of changes in the extent and mix of town centre land uses over time and forms the basis of a town centre health check.
7. Appendix A attached to this report provides summary statistics for each local authority area. A set of statistics is currently being prepared for each town centre which will allow for monitoring of performance of individual town centres and for comparison between centres. The data will also be useful in confirming the different roles that town centres perform and in identifying a network of centres.
8. Comparing the 2006, 2008 and 2009 surveys indicates that the total number of retail units (both in town centres and outwith) has remained steady, whereas the amount of retail floorspace has increased slightly by 2%. It should be borne in mind that these are net changes and that there has been a number of units that have closed as well as new ones that have opened.
9. The continued importance of town centres as centres of retailing is highlighted by the fact that 70% of shop units are located within these areas. The total number of retail units in town centres has declined slightly (-3%) although the total retail floorspace has increased slightly in the North and South Ayrshire town centres. Within the East Ayrshire town centres, both the number of units and total retail floorspace have declined moderately (-4% and -5% respectively). Outwith town centres, the number of retail units and the amount of floorspace have increased (+4% and 4 ½ %), primarily as the consequence of the opening of new out-of-centre supermarkets.
10. The vacancy rate amongst town centre retail units is comparatively high in all three Council areas with an average of 20% of all retail units lying vacant. The rate in North Ayrshire is the most concerning with an average of 25% being vacant. In terms of the area of retail floorspace that is vacant, the most significant rise has been within South Ayrshire, where the rate increased by 8% between 2008 and 2009. This significant rise can be attributed to the loss of a number of multiple retailers during the recession in 2007 and 2008, with Ayr being particularly affected.
11. The vacancy rate amongst all town centre uses is less alarming than it is for retail only. In terms of the overall numbers of town centre units (excluding residential units) around 13% are unoccupied. However, where these are concentrated in particular streets, the effect can be very negative on the image and investment potential of the town centres concerned. Town centre vacancy rates have been increasing over time and this is clearly a cause for concern.
12. The dominant land uses within town centres are service uses (banks, takeaways, hairdressers, doctors surgeries, public offices, etc). On average, just under half of all town centre units are used for services. Retail is the next most significant land use, with

around 40% of units being in retail use. Class 4 Offices (those not primarily intended for visiting members of the public) and other miscellaneous uses make up the remaining ten percent.

13. The only discernable change in the mixture of town centre uses has been a gradual increase in the proportion of units that are service units. These have increased proportionately by 3%.

## **SUMMARY**

14. The Joint Planning Unit's monitoring of retail units and town centre uses indicates that net growth in floorspace has occurred outwith town centres between 2006 and 2009 and that within town centres, retail units and floorspace have remained fairly static. The vacancy rate amongst town centre retail units has risen and is at a level which is of concern in terms of the continued vitality and viability of some centres.
15. The period covered by the monitoring exercise is very short and it is important not to draw too many conclusions regarding how the mixture of land uses is changing over time. However, the national long term trends towards, fewer, larger retail units and increasing proportion of service uses within high streets, appear to be evident over this brief period. Continued monitoring in future years will be essential if the longer term pattern of change is to be understood and appropriate recommendations made for future planning policy.

## **RECOMMENDATION**

16. The Ayrshire Joint Planning Steering Group is asked to:
  - note the contents of this report;
  - agree that the Joint Planning Unit will disseminate the results of the retail capacity study directly to the planning policy teams with a further report to the Steering Group at the next meeting;
  - agree to the publication of a summary of the results of the town centre land uses monitoring exercise on the Joint Planning Units website; and
  - agree to a further survey of town centre land uses during 2011 to maintain the evidence base for town centre planning policy.

John Esslemont  
Acting Manager  
Ayrshire Joint Planning Unit

Person to Contact: Alan Edgar 01292 673764 [alan.edgar@south-ayrshire.gov.uk](mailto:alan.edgar@south-ayrshire.gov.uk)

## APPENDIX A – Monitoring Summary Statistics

NUMBER OF OCCUPIED AND UNOCCUPIED RETAIL UNITS BY LOCAL AUTHORITY				
	2006	2008	2009	NET CHANGE 06-09
EAST	621	614	604	-17
NORTH	682	697	693	+11
SOUTH	826	810	803	-23
AYRSHIRE	2129	2121	2100	-29

NET FLOORSPACE OF OCCUPIED AND UNOCCUPIED RETAIL UNITS BY LOCAL AUTHORITY				
	2006	2008	2009	NET CHANGE 06-09
EAST	114,733	113,330	112,825	-1908
NORTH	103,606	108,046	107,382	+3776
SOUTH	146,066	151,956	151,049	+4983
AYRSHIRE	364,405	373,332	371,256	+6851

TOWN CENTRE NUMBER OF OCCUPIED AND UNOCCUPIED RETAIL UNITS BY LOCAL AUTHORITY				
	2006	2008	2009	NET CHANGE 06-09
EAST	428	418	412	-16
NORTH	484	484	477	-7
SOUTH	605	582	575	-30
AYRSHIRE	1517	1484	1464	-53

TOWN CENTRE FLOORSPACE OF OCCUPIED AND UNOCCUPIED RETAIL UNITS BY LOCAL AUTHORITY				
	2006	2008	2009	NET CHANGE 06-09
EAST	61,193	58,252	57,889	-3304
NORTH	60,261	63,889	61,932	+1671
SOUTH	96,033	98,841	97,686	+1653
AYRSHIRE	217,487	220,982	217,507	+20

NON TOWN CENTRE NUMBER OF OCCUPIED AND UNOCCUPIED RETAIL UNITS BY LOCAL AUTHORITY				
	2006	2008	2009	NET CHANGE 06-09
EAST	193	196	192	-1
NORTH	198	213	216	+18
SOUTH	221	228	228	+7
AYRSHIRE	612	637	636	+24

NON TOWN CENTRE FLOORSPACE OF OCCUPIED AND UNOCCUPIED RETAIL UNITS BY LOCAL AUTHORITY				
	2006	2008	2009	NET CHANGE 06-09
EAST	53,540	55,078	54,936	+1,396
NORTH	43,345	44,158	45,451	+2,106
SOUTH	50,034	53,115	53,363	+3,329
AYRSHIRE	146,919	152,351	153,750	+6,831

PROPORTION OF OCCUPIED AND UNOCCUPIED RETAIL UNITS LOCATED WITHIN TOWN CENTRES (%)				
	2006	2008	2009	NET CHANGE 06-09
EAST	69	68	68	-1
NORTH	71	69	69	-2
SOUTH	74	72	72	-2
AYRSHIRE	71	70	70	-2

PROPORTION OF OCCUPIED & UNOCCUPIED NET RETAIL FLOORSPACE LOCATED WITHIN TOWN CENTRES (%)				
	2006	2008	2009	NET CHANGE 06-09
EAST	53	51	51	-2
NORTH	58	59	58	0
SOUTH	66	65	65	-1
AYRSHIRE	60	59	59	-1

NUMBER OF VACANT RETAIL UNITS BY LOCAL AUTHORITY AREA				
	2006	2008	2009	NET CHANGE 06-09
EAST	120	126	114	-6
NORTH	118	126	120	+2
SOUTH	162	140	166	+4
AYRSHIRE	400	392	400	0

VACANT RETAIL FLOORSPACE BY LOCAL AUTHORITY AREA				
	2006	2008	2009	NET CHANGE 06-09
EAST	15,697	16,326	15,716	+19
NORTH	8,135	8,587	8,790	+655
SOUTH	15,823	11,968	18,953	+3130
AYRSHIRE	39,655	36,881	43,459	+3804

NUMBER OF VACANT TOWN CENTRE RETAIL UNITS BY LOCAL AUTHORITY AREA				
	2006	2008	2009	NET CHANGE 06-09
EAST	86	86	82	-4
NORTH	82	84	82	0
SOUTH	113	99	125	+12
AYRSHIRE	281	269	289	+8

AMOUNT OF TOWN CENTRE VACANT RETAIL FLOORSPACE BY LOCAL AUTHORITY AREA				
	2006	2008	2009	NET CHANGE 06-09
EAST	11,112	8,631	8,326	-2,786
NORTH	5,342	6,247	6,615	+1,273
SOUTH	11,271	8,997	17,033	+5,762
AYRSHIRE	27,725	23,875	31,974	+4,249

PROPORTION OF TOWN CENTRE RETAIL UNITS THAT WERE VACANT BY LOCAL AUTHORITY AREA (NUMBER OF UNITS)				
	2006	2008	2009	NET CHANGE 06-09
EAST	20%	21%	20%	0
NORTH	24%	26%	25%	+1%
SOUTH	19%	18%	20%	+1%
AYRSHIRE	19%	18%	20%	+1%

PROPORTION OF TOWN CENTRE RETAIL FLOORSPACE THAT WAS VACANT BY LOCAL AUTHORITY AREA				
	2006	2008	2009	NET CHANGE 06-09
EAST	18%	15%	14%	-4%
NORTH	9%	10%	11%	+2%
SOUTH	12%	9%	17%	+6%
AYRSHIRE	13%	11%	15%	+2%

NUMBER OF ALL OCCUPIED AND UNOCCUPIED TOWN CENTRE UNITS (INCLUDING RETAIL BUT EXCLUDING RESIDENTIAL)				
	2006	2008	2009	NET CHANGE 06-09
EAST	1084	1092	1087	+3
NORTH	1233	1247	1242	+9
SOUTH	1292	1294	1293	+1
AYRSHIRE	3609	3633	3622	+13

EAST AYRSHIRE TOWN CENTRES MIX OF USES (OCCUPIED UNITS) (EXCLUDING RESIDENTIAL USES)				
	2006	2008	2009	NET CHANGE 06-09
RETAIL (%)	37	37	37	0
SERVICES (%)	45	48	48	+3
OFFICES (%)	16	14	14	-2
OTHER (%)	2	2	1	-1

NORTH AYRSHIRE TOWN CENTRES MIX OF USES (OCCUPIED UNITS) (EXCLUDING RESIDENTIAL USES)				
	2006	2008	2009	NET CHANGE 06-09
RETAIL (%)	39	39	39	0
SERVICES (%)	48	49	49	+1
OFFICES (%)	11	10	10	-1
OTHER (%)	2	3	2	0

SOUTH AYRSHIRE TOWN CENTRES MIX OF USES (OCCUPIED UNITS) (EXCLUDING RESIDENTIAL USES)				
	2006	2008	2009	NET CHANGE 06-09
RETAIL (%)	45	45	43	-2
SERVICES (%)	43	45	46	+3
OFFICES (%)	9	8	8	-1
OTHER (%)	2	3	2	0