ITEM No. 6

AYRSHIRE JOINT PLANNING STEERING GROUP
16 December 2009

Ayrshire Household Shopping Survey 2009

PURPOSE OF REPORT

1 To present a summary of the main findings of the survey of household shopping patterns which was completed in June this year and provide a comparison with the survey which was carried out in 2003.

BACKGROUND

2 A survey of shopping patterns of a representative sample of households in Ayrshire was undertaken on behalf of the three Councils in June 2009. The survey is essentially a repeat of the shopping survey carried out in 2003 for the replacement Ayrshire Joint Structure Plan. The new survey will help inform the development of retail and town centre policies in the emerging local development plans and provides an essential evidence base for the assessment of retail planning applications (for full results see Appendix).

KEY FINDINGS

3 The survey asked households where they shop for food & groceries and several non-food categories. A summary of the key findings for each of these is presented below.

Food and Groceries

- Ayrshire remains highly self-contained for food and grocery shopping.
- Only around 1% of expenditure is exported to other locations.
- Home Delivery Services and internet shopping are not significant.
- There is a significant level of leakage (circa 12% of available expenditure in East Ayrshire) from the southern half of East Ayrshire (Cumnock and the Doon Valley areas) to Ayr and this position has worsened since 2003, when the figure was circa 9%.
- Within North Ayrshire, Ardrossan has increased its share of the North Ayrshire market significantly, following the development of the new Asda store in the town, whereas Saltcoats has seen its share reduce.
- North Ayrshire has the most de-centralised pattern of shopping whereas Ayr and Kilmarnock dominate shopping within their respective local authority areas implying greater travel distances for those living outside the two main towns.
- The large supermarket chains remain as the most popular destinations for food and grocery shopping. After allowing for over-representation of supermarkets in the survey

responses (which is a feature of this type of cold-call telephone survey) the results suggest that 70% of locally available expenditure is spent within the stores operated by Tesco, Asda and Morrisons.

- The most frequently quoted reason for choosing where to shop for food and groceries was proximity to home (45% of respondents). An overall look at the survey results however would suggest that the availability of a large supermarket operated by one of the top three chains is a more significant factor in choice of destination.
- 81% of food shopping related journeys are undertaken by private car. Only 9% of journeys are by foot and 7% by bus. The high car usage reflects the concentration of shops within key towns generally, and large supermarkets in particular. It may also reflect the desire by households to undertake one large weekly shop and a preference for private car travel over other modes.

Clothes and Footwear

- Ayrshire's level of self-containment for this category of shopping has remained stable since 2003 at around three quarters of available expenditure.
- Internet and catalogue shopping increased from around 3% to 8%.
- Leakage to the Glasgow Conurbation has remained relatively stable at around one fifth of available expenditure despite the development of new large scale shopping centres such as Silverburn and the Forge, etc. However, this position is not uniform across Ayrshire.
- Ayr remains the most significant shopping destination within Ayrshire, but its market share has reduced markedly (from circa 40% to circa 30%) as a result of reduced inflow from East and North Ayrshire and increased usage of the internet and catalogues for this type of shopping.
- South Ayrshire, however, remains much more self-contained than East and North Ayrshire and manages to retain a significant amount of expenditure within Ayrshire.
- North Ayrshire has witnessed a modest increase in the level of retention, suggesting that recent improvements in the clothing retail offer have improved the attraction of Irvine. However, there remains a significant amount of leakage (circa 44% in 2009 compared to 55% in 2003) to centres outside the council area.
- Leakage from East Ayrshire remains high at about 50% of available expenditure. Leakage to Glasgow Conurbation appears to have increased, with Silverburn being a notable draw (circa 6% of available expenditure). The increase in leakage has not been offset by an increase in import from the elsewhere in Ayrshire suggesting a worsening position for clothing retailers within East Ayrshire.

Electrical and Domestic Appliances

4. The 2003 survey asked respondents where they last bought "electrical goods or domestic appliances", whereas the 2009 survey split these into two separate questions. The results for the two questions are similar and are therefore compared together with the 2003 joint category.

- The survey results suggest that overall Ayrshire has become less self-contained for electrical and domestic goods shopping since 2003. This is as a result of increased leakage to stores in the Glasgow Conurbation and increased usage of internet and catalogue shopping.
- Leakage to the Glasgow Conurbation has increased from 2% in 2003 to 7% in 2009.
- Use of internet and catalogues has increased from 4% in 2003 to 13% in 2009.
- Heathfield's dominance in 2003 has declined from around a quarter of Ayrshire expenditure to around one fifth but remains the dominant electrical appliance shopping destination within South Ayrshire.
- Lamont Drive in Irvine has declined sharply in significance for this type of shopping whilst the Riverway has strengthened its market position.
- Cumnock has seen its share of the market decline from circa 5% to less than 1%.

DIY

- Ayrshire remains highly self-contained (94%) for DIY and hardware shopping.
- Internet/catalogue shopping is not significant (1%).
- As in 2003, the retail parks are the most important destinations for this form of retailing. However, Heathfield has shown a decline in its share of the Ayrshire market from circa 36% to circa 25%. The other retail parks have also shown declines in market share but to a lesser extent. In contrast, the 2009 survey responses showed a more important role for town centres than was the case in 2003. It is not clear whether this represents a shift in shopping habits or whether this is the result of statistical variation as there has been no substantial change in the distribution of DIY shops.

Furniture and Floor-coverings

- Ayrshire is less self contained for furniture and floor-coverings now than in 2003 (77% compared to 88%, respectively). Increased leakage to the Glasgow Conurbation is the main factor behind this decline, although the survey results indicate that use of the internet and catalogues have increased marginally.
- Ayr (town centre and Heathfield Retail Park) is the single most important destination for Ayrshire consumers and attracts around 30% of custom. Ayr town centre has strengthened its role for furniture and floor-coverings whereas the outlying areas along Prestwick Road have declined sharply. The town centre has continued to perform well notwithstanding recent significant store closures such as MFI.
- Both East and North Ayrshire are relatively not self-contained for this type of shopping (52% and 54%, respectively). This position has remained static since 2003 in East Ayrshire but marks a decline in the case of North Ayrshire.
- The Riverway Retail Park in Irvine has shown the most significant decline. In 2003, the retail park attracted some 15% of the Ayrshire available expenditure, whereas in 2009, this proportion was reduced to 5%. North Ayrshire's decline in its share of the Ayrshire expenditure on this category of goods is mainly attributable to increased leakage to the Glasgow Conurbation.

- Within East Ayrshire, Kilmarnock town centre is the most significant destination for furniture and floor-coverings, followed by Queen's Drive Retail Park. This is the same position as 2003.

CONCLUSION

4. In overall terms, food and grocery expenditure is contained within Ayrshire. Only in the southern half of east Ayrshire is there evidence of leakage, which is primarily directed towards Ayr. This would suggest that there are opportunities to improve and expand the food and grocery retail offer within those communities. Shopping patterns are highly influenced by the spatial distribution of the larger supermarkets. The concentration of these within Ayr in South Ayrshire and Kilmarnock in East Ayrshire implies significant demand for travel and implies underinvestment in communities which do not benefit from this type of store.

5. The position regarding non-food shopping is mixed. The patterns for clothes and footwear and DIY and hardware shopping in 2009 appear to be similar to those found in 2003. However, the results suggest that Ayr is to some extent loosing dominance within Ayrshire, albeit it remains an important centre within an Ayrshire context. It is apparent from the results that the internet and catalogue shopping is expanding particularly within the electrical and domestic appliances categories and to a lesser extent within the clothing sector. Leakage to the Glasgow Conurbation has increased for electrical, domestic appliances and furniture, but has remained at a steady level for clothing and DIY. The former is particularly significant to the health of Ayrshire's town centres and it is encouraging to note that the combined impact of the growth in use of the internet and the attraction of new out-of-centre shopping destinations within Glasgow have not had a more significant impact. However, it should be recognized that Ayr town centre is an important anchor for retail expenditure and employment and the erosion of its market share may have implications in the future for the success of Ayrshire as a whole in retaining expenditure.

6. The 2003 survey data was used to prepare a "*Retail Capacity Assessment"* for each of the three Council areas. The capacity assessments were used to quantify how much additional retail floorspace would need to be allocated through reviews of the local plans. The changes identified between the 2003 and 2009 household shopping surveys indicate a need to update this analysis, particularly in light of the current recession which has impacted adversely upon the retail sector.

RECOMMENDATIONS

7. It is recommended that

- The Steering Group is asked to note this report and agree to wider dissemination of the results via the Ayrshire Joint Planning Unit website; and ask the AJPU manager to bring forward a review of the Retail Capacity Assessments contained within the approved Ayrshire Joint Structure Plan.

Ian Johnson
Manager
Person to Contact: Alan Edgar (01292) 673764

Ayrshire Level Summary

Ayrshire Food and Grocery Shopping Results 2009	2009	2003
Summary		
Total Retained	97%	98%
Total Exported	2%	2%
Home Delivery/Internet	1%	<1%
Retained Expenditure Detail		
East Ayrshire	26%	31%
North Ayrshire	40%	38%
South Ayrshire	31%	31%
Exported Expenditure Detail		
Glasgow Conurbation	2%	0%

Clothes and Footwear	2009	2003
Ayrshire Summary		
Total Retained	73%	76%
Total Exported To Stores Outwith Ayrshire	19%	21%
Internet and catalogues	8%	3%
Retained Expenditure Detail		
Ayr	31%	40%
Kilmarnock	16%	19%
Irvine	16%	14%
Elsewhere Ayrshire	10%	3%
Exported Expenditure Detail		
Glasgow	10%	17%
Braehead	3%	2%
Silverburn	3%	not applicable
Elsewhere UK	2%	2%

Electrical & Domestic Appliances	2009		2003
Ayrshire Summary	Electrical	Domestic	Electrical & Domestic
Total Retained	77%	83%	94%
Total Exported To Stores Outwith Ayrshire	9%	6%	2%
Internet and catalogues	13%	11%	4%
Retained Expenditure Detail			
Heathfield	18%	16%	25%
Riverway	16%	16%	12%
Lamont Drive	<1%	0%	11%
Queen's Drive	6%	9%	6%
Glencairn	4%	5%	8%
Irvine Town Centre	7%	7%	4%
Kilmarnock Town Centre	7%	6%	7%
Ayr Town Centre	7%	7%	7%
Cumnock Town Centre	<1%	1%	5%
Rest of Ayrshire	10%	16%	9%
Exported Expenditure Detail			
Glasgow Conurbation	7%	5%	2%
Braehead	1%	1%	0%
Silverburn	<1%	0%	not applicable
Elsewhere	1%	0%	0%

DIY	2009	2003
Ayrshire Summary		
Total Retained	94%	98%
Total Exported To Stores Outwith Ayrshire	5%	2%
Internet and catalogues	1%	0%
Retained Expenditure Detail		
Hawkhill, Stevenston	16%	20%
Riverway, Irvine	8%	11%
Irvine Town Centre	3%	0%
Rest of North Ayrshire	6%	1%
Heathfield, Ayr	25%	36%
Ayr Town Centre	3%	0%
Queen's Drive, Kilmarnock	23%	25%
Glencairn, Kilmarnock	0%	2%
Kilmarnock Town Centre	4%	0%
Cumnock Town Centre	1%	0%
Rest of East Ayrshire	1%	1%
Exported Expenditure Detail		
Glasgow	4	1%
Greenock	1	1%

Furniture & Floor-coverings	2009	2003
Ayrshire Summary		
Total Retained	77%	88%
Total Exported To Stores Outwith Ayrshire	18%	10%
Internet and catalogues	5%	2%
Retained Expenditure Detail		
Hawkhill, Stevenston	6%	2%
Lamont Drive, Irvine	0%	1%
Riverway, Irvine	5%	15%
Rest of Irvine	7%	5%
Garnock Valley	1%	1%
Largs	1%	1%
Rest of North Ayrshire	3%	5%
Heathfield, Ayr	13%	17%
Ayr Town Centre	17%	11%
Ayr OOC	0%	10%
Rest of South Ayrshire	2%	0%
Queen's Drive, Kilmarnock	6%	4%
Glencairn, Kilmarnock	1%	0%
Kilmarnock Town Centre	14%	12%
Rest of East Ayrshire	0%	4%
Exported Expenditure Detail		
Braehead	5%	4%
Rest of Glasgow Conurbation	12%	6%
Rest of Scotland	1%	0%
SFOT	5%	2%

East Ayrshire Summary

East Ayrshire Food and Grocery Shopping Results 2009		
Summary	2009	2003
Total Retained	77%	81%
Total Exported To Stores Outwith East Ayrshire	21%	19%
Home Delivery/Internet	2%	0%
Imported from North Ayrshire*	3%	5%
Imported from South Ayrshire**	2%	7%
Retained Expenditure Detail		
Kilmarnock	63%	63%
Auchinleck	7%	6%
Cumnock	3%	4%
Rest of East Ayrshire	4%	8%
Exported Expenditure Detail		
Irvine	4%	6%
Rest of North Ayrshire	<1%	2%
Ayr	12%	9%
Rest of South Ayrshire	1%	2%
Glasgow Conurbation	2%	0%
Imported Expenditure Detail		
Irvine*	2%	1%
Rest of North Ayrshire*	1%	4%
Dundonald (KA2 9)**	1%	1%
Rest of South Ayrshire**	1%	6%

*proportion of available expenditure in North Ayrshire
** proportion of available expenditure in South Ayrshire

Clothes and Footwear	2009	2003
East Ayrshire Summary		
Total Retained	43%	49%
Total Exported To Stores Outwith East Ayrshire	49%	50%
Internet/catalogues	7%	2%
Retained Expenditure Detail		
Kilmarnock	39%	49%
Cumnock	3%	0%
Rest of East Ayrshire	1%	0%
Exported Expenditure Detail		
Ayr	23%	30%
Glasgow	12%	11%
Braehead	1%	2%
Silverburn	6%	not applicable
Rest of South Ayrshire	1%	<1%
North Ayrshire	4%	3%
Elsewhere UK	2%	3%
Imported Expenditure		
% of Available North Ayrshire Expenditure	10%	8%
% of Available South Ayrshire Expenditure	2%	4%

Electrical and Household Domestic Appliances	2009		2003
East Ayrshire	Electrical	Domestic	Electrical & Domestic
Total Retained	53%	65%	65%
Total Exported To Stores Outwith East Ayrshire	34%	23%	28%
Internet and catalogues	13%	11%	3%
Retained Expenditure Detail			
Queen's Drive	18%	26%	16%
Glencairn	10%	13%	19%
Kilmarnock Town Centre	19%	15%	19%
Cumnock	2%	4%	6%
Rest of East Ayrshire	4%	7%	5%
Exported Expenditure Detail			
Glasgow Conurbation	5%	3%	1%
Braehead	1%	0%	0%
Elsewhere	1%	0%	0%
Riverway, Irvine	4%	2%	3%
Lamont Drive	0%	0%	3%
Irvine Town Centre	2%	1%	<1%
Heathfield, Ayr	13%	10%	18%
Rest of Ayr	6%	6%	3%
Imported Expenditure Detail			
% of North Ayrshire Available Expenditure	2%	3%	10%
% of South Ayrshire Available Expenditure	2%	2%	9%

DIY	2009	2003
East Ayrshire Summary		
Total Retained	77%	77%
Total Exported To Stores Outwith East Ayrshire	22%	22%
Internet and catalogues	0%	0%
Retained Expenditure Detail		
Queen’s Drive, Kilmarnock	62%	70%
Glencairn, Kilmarnock	1%	4%
Kilmarnock Town Centre	10%	0%
Cumnock Town Centre	3%	0%
Rest of East Ayrshire	2%	3%
Exported Expenditure Detail		
Hawkhill, Stevenston	1%	1%
Riverway, Irvine	0%	1%
Rest of North Ayrshire	1%	0%
Heathfield, Ayr	12%	20%
Ayr Town Centre	4%	0%
Glasgow	3%	0%
Imported Expenditure Detail		
% of North Ayrshire Available Expenditure	5%	6%
% of South Ayrshire Available Expenditure	2%	3%

Furniture & Floor-coverings	2009	2003
East Ayrshire Summary		
Total Retained	52%	50%
Total Exported To Stores Outwith East Ayrshire	44%	48%
Internet and catalogues	5%	2%
Retained Expenditure Detail		
Queen’s Drive, Kilmarnock	16%	11%
Glencairn, Kilmarnock	2%	0%
Kilmarnock Town Centre	31%	26%
Cumnock Town Centre	2%	0%
Rest of East Ayrshire	1%	13%
Exported Expenditure Detail		
Hawkhill, Stevenston	2%	2%
Riverway, Irvine	1%	7%
Irvine Town Centre	2%	5%
Garnock Valley	1%	0%
Heathfield, Ayr	9%	9%
Rest of Ayr	14%	16%
Rest of South Ayrshire	1%	0%
Braehead	4%	5%
Rest of Glasgow Conurbation	10%	4%
Elsewhere	1%	0%
Imported Expenditure Detail		
% of North Ayrshire Available Expenditure	8%	7%
% of South Ayrshire Available Expenditure	7%	4%

North Ayrshire Summary

North Ayrshire Food and Grocery Shopping Results 2009		
Summary	2009	2003
Total Retained	92%	89%
Total Exported to Stores Outwith North Ayrshire	6%	11%
Home Delivery/internet	1%	0%
Imported from East Ayrshire*	5%	8%
Imported from South Ayrshire**	7%	11%
Retained Expenditure Detail		
Irvine	37%	43%
Ardrossan	10%	<1%
Saltcoats	8%	17%
Stevenston	15%	9%
Largs	10%	12%
Kilbirnie	6%	3%
Rest of North Ayrshire	6%	6%
Exported Expenditure Detail		
East Ayrshire	3%	5%
South Ayrshire	1%	4%
Glasgow Conurbation	2%	2%
Imported Expenditure Detail	% of Available Expenditure In Council Area	
Dundonald (KA2 9)**	2%	1%
Troon & Loans (KA10 6 & KA10 7)**	4%	5%
Rest of South Ayrshire**	1%	5%
Kilmarnock & Crosshouse*	2%	1%
Stewarton (KA3 5)*	1%	<1%
Rest of East Ayrshire*	2%	6%

*proportion of available expenditure in East Ayrshire
** proportion of available expenditure in South Ayrshire

Clothes and Footwear	2009	2003
North Ayrshire Summary		
Total Retained	47%	41%
Total Exported To Stores Outwith North Ayrshire	44%	55%
Internet/catalogues	8%	4%
Retained Expenditure Detail		
Irvine	32%	33%
Three Towns	8%	4%
Largs	5%	2%
Rest of North Ayrshire	2%	2%
Exported Expenditure Detail		
Glasgow	15%	30%
Braehead	7%	3%
Silverburn	1%	not applicable
Ayr	8%	14%
Rest of South Ayrshire	<1%	<1%
Kilmarnock	10%	8%
Elsewhere	2%	0%
Imported Expenditure Detail		
% of East Ayrshire Available Expenditure	4%	3%
% of South Ayrshire Available Expenditure	4%	3%

Electrical and Household Domestic Appliances	2009		2003
North Ayrshire	Electrical	Domestic	Electrical & Domestic
Total Retained	65%	73%	73%
Total Exported To Stores Outwith North Ayrshire	22%	16%	22%
Internet and catalogues	13%	10%	5%
Retained Expenditure Detail			
Riverway	34%	37%	25%
Lamont Drive	1%	0%	23%
Irvine Town Centre	17%	16%	9%
Rest of North Ayrshire	13%	21%	16%
Exported Expenditure Detail			
Kilmarnock	2%	3%	5%
Ayr	2%	0%	6%
Cumnock	0%	0%	5%
Glasgow Conurbation	12%	9%	5%
Braehead	3%	2%	0%
Silverburn	0%	0%	not applicable
Imported Expenditure Detail			
% of East Ayrshire Available Expenditure	6%	4%	6%
% of South Ayrshire Available Expenditure	8%	9%	12%

DIY	2009	2003
North Ayrshire Summary		
Total Retained	80%	81%
Total Exported To Stores Outwith North Ayrshire	17%	18%
Internet and catalogues	2%	0%
Retained Expenditure Detail		
B&Q, Hawkhill, Stevenston	43%	52%
Riverway, Irvine	19%	25%
Lamont Drive, Irvine	1%	0%
Irvine Town Centre	5%	0%
Three Towns	6%	0%
Rest of North Ayrshire	7%	4%
Exported Expenditure Detail		
Heathfield, Ayr	1%	9%
Queen’s Drive, Kilmarnock	4%	4%
Glencairn, Kilmarnock	0%	2%
Kilmarnock OOC	1%	0%
Glasgow	7%	1%
Greenock	3%	2%
Imported Expenditure Detail		
% of East Ayrshire Available Expenditure	2%	2%
% of South Ayrshire Available Expenditure	6%	8%

Furniture & Floor-coverings	2009	2003
North Ayrshire Summary		
Total Retained	54%	65%
Total Exported To Stores Outwith North Ayrshire	41%	31%
Internet and catalogues	4%	4%
Retained Expenditure Detail		
Hawkhill, Stevenston	13%	4%
Riverway, Irvine	12%	30%
Lamont Drive, Irvine	0%	2%
Rest of Irvine	17%	8%
Garnock Valley	3%	4%
Largs	3%	2%
Rest of North Ayrshire	5%	15%
Exported Expenditure Detail		
Heathfield, Ayr	2%	1%
Rest of Ayr	5%	10%
Queen’s Drive, Kilmarnock	1%	1%
Kilmarnock Town Centre	7%	6%
Breahead	6%	3%
Rest of Glasgow Conurbation	19%	10%
Elsewhere	1%	0%
Imported Expenditure Detail		
% of East Ayrshire Available Expenditure	6%	14%
% of South Ayrshire Available Expenditure	3%	10%

South Ayrshire Summary

South Ayrshire Food and Grocery Shopping Results 2009		
Summary	2009	2003
Total Retained	90%	82%
Total Exported To Stores Outwith South Ayrshire	9%	18%
Home delivery/internet	1%	0%
Imported from East Ayrshire*	13%	11%
Imported from North Ayrshire**	1%	4%
Retained Expenditure Detail		
Ayr	68%	64%
Troon	10%	9%
Girvan	5%	4%
Prestwick	5%	3%
Maybole	1%	<1%
Rest of South Ayrshire	<1%	1%
Exported Expenditure Detail		
East Ayrshire	2%	7%
North Ayrshire	7%	11%
Glasgow Conurbation	<1%	0%
Imported Expenditure Detail		
Dalmellington & Patna (KA6 7)*	7%	6%
Auchinleck & Ochiltree (KA18 2)*	1%	<1%
Mauchline, Catrine & Sorn (KA5 6)*	1%	2%
Rest of East Ayrshire*	4%	3%
North Ayrshire **	1%	4%

*proportion of East Ayrshire available expenditure
**proportion of North Ayrshire available expenditure

Clothes and Footwear	2009	2003
South Ayrshire Summary		
Total Retained	77%	83%
Total Exported To Stores Outwith South Ayrshire	15%	15%
Internet/catalogues	7%	1%
Retained Expenditure Detail		
Ayr	71%	82%
Rest of South Ayrshire	6%	1%
Exported Expenditure Detail		
Glasgow	4%	6%
Braehead	<1%	<1%
Silverburn	2%	not applicable
Irvine	2%	3%
Rest of North Ayrshire	2%	0%
Kilmarnock	1%	4%
Cumnock	1%	0%
Elsewhere	2%	1%
Imported Expenditure Detail		
% of East Ayrshire Available Expenditure	24%	30%
% of North Ayrshire Available Expenditure	8%	14%

Electrical & Domestic Appliances	2009		2003
South Ayrshire	Electrical	Domestic	Electrical & Domestic
Total Retained	73%	75%	74%
Total Exported To Stores Outwith South Ayrshire	14%	14%	22%
Internet and catalogues	12%	11%	3%
Retained Expenditure Detail			
Heathfield, Ayr	43%	43%	52%
Ayr Town Centre	18%	16%	16%
Ayr OOC	7%	12%	6%
Prestwick	1%	0%	0%
Troon	1%	1%	0%
Girvan	2%	3%	0%
Exported Expenditure Detail			
Glasgow Conurbation	3%	2%	1%
Riverway, Irvine	7%	6%	5%
Lamont Drive	0%	0%	6%
Irvine Town Centre	1%	2%	1%
Queen’s Drive, Kilmarnock	0%	0%	1%
Glencairn, Kilmarnock	2%	1%	3%
Kilmarnock Town Centre	0%	1%	1%
Cumnock Town Centre	0%	0%	4%
Imported Expenditure Detail			
% of East Ayrshire Available Expenditure	19%	16%	21%
% of North Ayrshire Available Expenditure	2%	1%	6%

DIY	2009	2003
South Ayrshire Summary		
Total Retained	89%	87%
Total Exported To Stores Outwith South Ayrshire	8%	11%
Internet and catalogues	1%	0%
Retained Expenditure Detail		
Heathfield, Ayr	72%	84%
Ayr Town Centre	7%	0%
Troon	6%	0%
Girvan	2%	0%
Prestwick	2%	0%
Rest of South Ayrshire	1%	3%
Exported Expenditure Detail		
Hawkhill, Stevenston	1%	2%
Riverway, Irvine	3%	6%
Irvine, Town Centre	2%	0%
Queen's Drive, Kilmarnock	2%	3%
Imported Expenditure Detail		
% of East Ayrshire Available Expenditure	16%	20%
% of North Ayrshire Available Expenditure	1%	9%

Furniture & Floor-coverings	2009	2003
South Ayrshire Summary		
Total Retained	74%	79%
Total Exported To Stores Outwith South Ayrshire	22%	20%
Internet and catalogues	4%	1%
Retained Expenditure Detail		
Heathfield, Ayr	31%	40%
Ayr Town Centre	36%	18%
Rest of Ayr	2%	9%
Rest of South Ayrshire	6%	12%
Exported Expenditure Detail		
Hawkhill, Stevenston	2%	0%
Lamont Drive, Irvine	0%	1%
Riverway, Irvine	0%	7%
Rest of Irvine	1%	2%
Queen's Drive, Kilmarnock	2%	1%
Glencairn, Kilmarnock	1%	0%
Kilmarnock Town Centre	4%	3%
Braehead	5%	3%
Rest of Glasgow Conurbation	6%	3%
Elsewhere	1%	0%
Imported Expenditure Detail		
% of East Ayrshire Available Expenditure	24%	25%

% of North Ayrshire Available Expenditure	7%	11%