Ayrshire Joint Planning Unit

MONITOR 2010

framework indicators for a Sustainable Ayrshire

Further copies of MONITOR 2010 are available from the

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AYRSHIRE JOINT STRUCTURE PLAN - MONITOR 2010

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Foreword

Welcome to **MONITOR 2010** the sixth in a series of monitoring statements prepared by the Ayrshire Joint Structure Plan and Transportation Committee and now by the Ayrshire Joint Planning Steering Group.

The series of reports provide a baseline against which the aims of the Structure Plan for Ayrshire and the wider goal of sustainable development can be measured.

In choosing the set of indicators within this report account has also been taken of the recommendations of the Sustainability Appraisal Group, which advised on sustainability during the preparation of the Structure Plan, objectives set within the Strategic Environmental Assessment, the UK shared framework[1] for sustainable development and principles set within Scottish Planning Policy.

It should be noted however that the planning system through Structure and Local Plans cannot necessarily influence in any direct way all of the indicators used in this document.

Nevertheless, we hope that you will find the information presented in this report of interest and can support the local authorities in Ayrshire meet the challenges faced in the future.

[1]One Future - Different Path: The UK's Shared Framework for Sustainable Development.

Context

a shared vision

for Ayrshire

A Shared Vision

The Ayrshire Joint Structure Plan " Growing a Sustainable Ayrshire" establishes a framework that brings together the aspirations of communities with those of business and industry, and the area's many supporting agencies and organisations, to provide a strategic land use context to the year 2025. The plan identifies where priorities lie and seeks to co-ordinate delivery through specifically agreed action and investment. To guide this process the plan sets a shared vision for progress and seeks to achieve strong & vibrant communities, a sustainable and growing economy a good quality of life and a healthy environment which together will make a positive contribution to the well being of Ayrshire and the wider Glasgow City Region and Scotland as a whole.

Whilst the vision seeks to capture the ideas at the heart of sustainable development achieving this goal, as the indicators chosen illustrate, will require significant progress and integrated action. If we share the vision and wish to set Ayrshire on a more sustainable track it is important that the scale of the task can be measured at the outset.

As previous monitoring has illustrated significant progress can be made over a relatively short period, significant challenges however remain.

A Vision for Ayrshire in 2025

Ayrshire will be a competitive place contributing to a thriving Scotland, that is receptive to change, open and welcoming to new people, new ideas, new activities and new ways of living: with strong vibrant communities: a well- connected, growing, diversified and sustainable economy; an excellent quality of life and healthy environment; with all people enjoying the highest levels of prosperity, choice and accessibility in partnership with the wider West of Scotland.

Source: AJSP, 22 November 2007

Introduction

Indicators

The set of indicators published in Monitor 2010 extend the 'Baseline Indicators' published in previous monitoring reports. A set of additional indicators covering "Well Being" and a range of contextual indicators introduced in 2006 to cover demographic, economic and housing issues have been continued.

The intent of the indicators is to communicate progress and highlight where future action could lie. Whilst the grouping of indicators is undoubtedly arbitary, it is hoped that the groupings which are in this Monitoring report, will highlight priority action areas and will assist the reader in "tracking progress" toward a delivery of the vision.

Indicator Themes

- **The Sutainable Use of Resources & Climatic Change**
- **Protecting natural resources and enhancing the Environment**
- **Well Being**
- **Sustainable Communities & Equity**
- **Context**

Sustainable Development

As with the previous set of indicators produced for the previous monitoring reports. Progress toward sustainable objectives is represented in the text by:

Moving towards sustainability

Moving away from sustainability

Could go in either direction

Tracking Progress

The direction of each indicator has also been colour coded to reflect change from previous years.

Red	*Deterioration*
Orange	*No significant change*
Green	*Improvements made*

Opportunity to Comment

We hope that you find the indicators presented of interest. A more extensive range of background material can be found on our web site at www.ayrshire-jsu.gov.uk. We would welcome any comment you wish to make on the content of the document by e-mail or by direct correspondence.

COMMENT SHOULD BE SENT TO:

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Meeting the Challenge - Measuring Progress

A Summary of Key Points in MONITOR 2010

SUSTAINABLE USE OF RESOURCES & CLIMATE CHANGE

- Climate Change is having an impact on Ayrshire. The national target is to reduce emissions by 42% by 2020 and set annual emission targets for 2010-22
- Average domestic gas and electricity consumption has fallen since 2005
- Ayrshire continues to play a significant role in meeting national renewable targets
- Coal production from opencast mining has declined.
- There have been significant increases in recycling rates.

PROTECTING NATURAL RESOURCES AND ENHANCING THE ENVIRONMENT

- A framework has been set for the protection of habitats and species in Ayrshire. A revised Action Plan is being implemented.
- Significant improvements but water quality remains a concern.
- Air quality is good and continues to improve.
- Farm woodland and farm infrastructure have seen significant increases since 1991. Grazing land has noticeably decreased. Grant aided woodland planting has fallen sharply.
- Over half of Ayrshire's land area is under some form of enhanced landscape protection. The impact of renewable proposals on many valued landscapes remains a concern.
- A framework for Scotland's soils has been published.

WELL BEING

- Average gross disposable income in parts of Ayrshire remains amongst the lowest in Scotland.
- Life expectancy continues to rise.
- Unemployment has risen and is above the Scotland and UK averages.
- Ayrshire has significant levels of the population within the 16-19 years age group not in education, training or employment - these are amongst the highest in Scotland.
- The skills within the workforce continue to improve, particularly those with degree qualifications. This will have a positive effect on Ayrshire's economy and on peoples ability to take up improved job opportunities throughout the West of Scotland.

COMMUNITIES

- There remains significant disparity between and within communities. 21% of children in North Ayrshire live in 'workless households'.
- The majority of residents within Ayrshire perceive that they have well placed facilities and services.
- The proportion of non car journeys to work has remained static in recent years.
- Recorded crimes are falling.
- Serious and fatal road accident casualties have fallen.
- South Ayrshire is seen by it's residents as a particularly good place to live.
- Though some derelict and urban vacant land has been brought back into use, the total area remains stable.
- The lack of resources to monitor adequately the impact of development on the heritage resource remains an area of concern.
- The number of homes built in the Irvine Bay 'priority regeneration area' has decreased in terms of absolute numbers but has remained steady in proportionate terms. The numbers of homes built within the Coalfield community area has increased in absolute and proportionate terms.
- A significant proportion of retail expenditure is retained within town centres. The number of retail 'shops' has fallen in town centres.

CONTEXTUAL

Economy

- There has been substantial losses of employment in key sectors of the economy.
- Recent improvements in company survival rates are a positive step in helping to grow indigenous talent & achieving improved business performance. The birth rate of new firms remains low.
- GDP per head is below the Scottish and UK average.
- In the longer term continued growth in retail expenditure is anticipated.
- Passengers using Glasgow Prestwick International Airport has fallen significantly during the recession.

Demographics and Households

- Households have grown despite modest changes in population.
- Population within Ayrshire is forecast to fall and age as a result of natural change and migration.
- Along with the rest of Scotland there has been a significant drop in volume and value of house sales.

Sustainable Use of Resources & Climate Change

CHALLENGES

- To reduce CO_2 emissions and mitigate the impacts of climate change
- To conserve the use of natural resources
- To facilitate renewable energy
- To reduce waste streams and encourage recycling and support "Zero Waste" objectives

Climate Change

Emissions of Greenhouse Gases*	1990	2007	2008	Change from 1990	Change from 2007
Greenhouse Gas Emissions excluding International Aviation & Shipping	68.1	55.3	53.7	-21.1%	-2.9%
International Aviation	0.4	1.2	1.1	157.3%	-12.4%
International Shipping	1.6	1.2	1.3	-17.3%	5.5%
Total Greenhouse Gas Emissions including International Aviation & Shipping	70.1	57.8	56.1	-20.0%	-3.0%

*Million Tonnes Carbon Dioxide Equivalent
Source: Scottish Government, 2010

CO_2 Emissions (Kt CO_2 - 2005-2008)	2005	2006	2007	2008
East Ayrshire	744	738	745	674
North Ayrshire	1,316	1,309	1,286	1,284
South Ayrshire	712	754	771	729
Ayrshire	2,772	2,801	2,802	2,687
Scotland	41,253	41,777	41,829	41,024

Source: DECC - 2008 Carbon Emissions at Local Authority, Published 2010

Scottish Greenhouse Gas Emissions by Source: 2008 share, 2008 Comparisons with 1990 and 2007

National Communication Categories	% share of 2008	% change from 1990	% change from 2007
Energy Supply	35%	-13%	-6%
Transport	22%	7%	-2%
Business and Industrial process	14%	-37%	-4%
Agriculture	14%	-22%	-3%
Residential	13%	-2%	4%
Waste Management	5%	-52%	4%
International Aviation and Shipping	4%	20%	-4%
- International Aviation	2%	157%	-12%
Public	2%	-23%	7%
Land Use, Land Use Change & Forestry	-8%	78%	1%
Total Greenhouse Gas Emissions	100%	-20%	-3%

Source: DECC - 2008 Carbon Emissions at Local Authority, Published 2010

CO_2 Emissions

The effects of climate change are already being seen, with increases in mean temperature and higher levels of rainfall recorded, along with an increase in the frequency of storms. If greenhouse gas emissions continue to rise these effects are likely to become more pronounced. Climate change will have wide ranging implications for the economy, the built and natural environment and people's lives and whilst it is important to reduce Scotland's contribution to the causes of global warming it is also necessary to prepare to adapt to the changes that now seem to be inevitable. To meet these challenges the Climate Change (Scotland) Act was passed in 2009. It introduces a statutory framework for greenhouse gas emission targets and duties on Scottish public bodies.

Net emissions of greenhouse gases including international aviation and shipping for Scotland fell by 20% between 1990 and 2008 from 70.0mt of carbon dioxide equivalent to 56mt.

The increase in travel by road and air has however led to an increase in transports' contribution to greenhouse gas emissions. Across Scotland emissions grew (by 7% and 157% for transport and international aviation respectively from their 1990 levels) and now account for around a quarter of all Scottish CO_2 emissions. Until recently the growth in the transport sector contrasted with a decline in other areas.

Power generation emits the largest amount of greenhouse gases and accounts for 35% of the total.

Climate Change is having an impact on Ayrshire. The national target is to reduce emissions by 42% by 2020 and set annual emission targets for 2010-22

Resource Use

Domestic Water Consumption

Water is something that is often taken for granted. It is however a vital resource and consumed every day at home, in work and in schools. On average each person uses approximately 143 litres per day*. Encouraging sustainable use will not only protect and conserve this resource but also save energy in treatment and pumping. In 2010 work commenced to install a new storm water network from Kilmarnock and Irvine to the Waste Water Treatment Works at Meadowhead. Plans to upgrade, replace or repair 600 miles of existing water main pipes across Ayrshire will improve water supply and provide fresher drinking water.

*Scottish Water

Resource Use

Gas & Electricity Consumption

The levels of gas and electricity consumption give an indication of resource use in Ayrshire. Currently most electricity is generated by non-renewable fossil fuels, making it unsustainable as well as contributing to environmental problems such as global warming and air pollution. In addition to encouraging the move towards energy supplies with a smaller environmental footprint, it is also important to promote energy saving measures such as improving levels of insulation in buildings. As the figures show domestic electricity energy use across Ayrshire is slightly below the Scottish average whilst gas consumption is slightly above in East and South Ayrshire. The figures for North Ayrshire's gas and electricity consumption for industry and commerce are above average due to the presence of more energy intensive industry and commerce in the area.

Average domestic gas and electricity consumption has fallen since 2005

	Electricity			
	Average Domestic Consumption per Customer (kWh)		Average Industrial and Commercial Consumption per Customer (kWh)	
	2005	2008	2005	2008
East Ayrshire	4,040	3,745	56,700	60,320
North Ayrshire	4,350	3,964	117,000	113,634
South Ayrshire	4,390	4,062	60,000	63,520
Total Scotland	4,630	4,236	75,300	75,716

Source: Dept of Energy and Climate Change. Sub National Gas Sales 2005, 2006, 2007, 2008 (Revised January 2010). Sub National Authority Electricity Consumption Statistics 2005, 2006, 2007 and 2008 (Revised January 2010).

	Gas			
	Average Domestic Consumption per Customer (kWh)		Average Industrial and Commercial Consumption per Customer (kWh)	
	2005	2008	2005	2008
East Ayrshire	20,660	18,431	675,200	661,804
North Ayrshire	19,810	17,361	2,482,900	2,909,555
South Ayrshire	21,610	19,219	601,000	860,383
Total Scotland	20,040	18,043	745,900	818,875

Source: Dept of Energy and Climate Change. Sub National Gas Sales 2005, 2006, 2007, 2008 (Revised January 2010). Sub National Authority Electricity Consumption Statistics 2005, 2006, 2007 and 2008 (Revised January 2010).

Resource Use

Renewable Energy

The Scottish Government has revised its target of electricity generated from renewables to 31% by 2011 and 80% of Scottish electricity consumption by 2020. It seems likely that existing renewable energy installed plus capacity that has been consented but not yet built will be sufficient to meet and exceed the 2011 target. Ayrshire plays a valuable role in achieving these targets with a number of significant wind farms currently operational or being planned, including what is Europe's largest wind farm of 140 turbines, generating 322mw (part of which is in East Ayrshire).

Ayrshire continues to play a significant role in meeting national renewable targets

Wind Energy in Ayrshire
Proposals operating or with consent

Council	Site	Location	No. of Turbines	Installed Capacity (mw)
East Ayrshire	Hare Hill	New Cumnock	20	13
	Whitelee	Whitelee Forest	25	57.5
	Whitelee Extension	Whitelee Forest		
	Phase 1		36	130
	Phase 2		39	141
North Ayrshire	Wardlaw Wood	Dalry	6	12
	Millour Hill	Dalry	6	18
	Kelburn	Largs	14	28
	Haupland/Busbie Muir	Ardrossan	15	30
South Ayrshire	Hadyard Hill	Dailly/Barr	53	130
	Arecleoch	Barrhill	60	180
	Mark Hill	Barrhill	28	84
Ayrshire			302	823.5

Source: AJPU 2010

Resource Use

Opencast Coal Production 2000 - 2007			
Year*	No. of Sites	Employment	Production (m. tonnes)
1999/2000	15	637	2.9
2000/2001	14	581	3.5
2001/2002	13	874	4.5
2002/2003	11	805	4.2
2003/2004	10	596	3.9
2004/2005	13	693	3.8
2005/2006	8	731	4.0
2006/2007	7	477	3.3
2007/2008	8	594	3.4
2008	8	623	3.2
2009	8	638	2.9

*Since 2008 Statistics published for January to December. Prior to 2008 published for April/March
Source: The Coal Authority Production and Manpower Returns 2010

Mineral Depletion

The geology of Ayrshire has provided opportunity for the supply of minerals over many centuries. In the future, efficient management of this resource will provide opportunity for sustained growth and employment. There are currently three significant resources that are developed commercially. These are:

- Coal worked by opencast method
- Aggregates (hardrock and sand and gravel)
- Other specialised products such as Bauxitic clay, limestone and Hydrofacturing Sands

Recent figures suggest that opencast coal production has fallen and employment in the industry has dropped to 1999/2000 levels. Opencast coal extraction in Ayrshire accounts for 48% of opencast coal production, within Scotland and 30% of all UK coal surface production, 17% of total UK production. 8 sites are currently in operation, all within East Ayrshire. The East Ayrshire Community Coalfield Environment Initiative was launched in 2002 and seeks to restore open cast sites with the aim of improving the landscape, creating habitat for wildlife and enhancing access for recreation.

Coal production from opencast mining has declined.

Waste

Council	MSW (tonnes)*	MSW Landfilled (tonnes)	% MSW Recycled/ Composted
East Ayrshire	71,931	41,650	42.1
North Ayrshire	87,963	56,550	35.7
South Ayrshire	82,240	48,316	41.3
Ayrshire	242,134	146,516	39.5
Total Scotland	3,288,069	2,076,388	34.3

*MSW managed by Local Authorities 2008/2009
Source: SEPA and Digest, 2010

Zero Waste Targets		
	Recycling or Composting	Landfill
2000	40%	
2013	50%	
2020	60%	
2025	70%	5%

Note: Targets apply to household waste (no longer municipal waste)
Source: Scottish Government

Recycling Performance (Recycling & Compost Rates) %		
	2002/2003	2008/2009
East Ayrshire	4.38	41.7
North Ayrshire	12.36	31.1
South Ayrshire	5.21	43.1
Scotland	7.97	31.7

Source: SEPA, Waste Digest 2010

Waste

Waste production can represent a significant misuse of valuable resources, as well as generating greenhouse gases and causing a wide range of environmental problems. In common with the rest of Scotland, Ayrshire is continuing to increase levels of waste that is recycled whilst reducing landfill tonnage.

The Zero Waste Plan for Scotland was published in 2010 and sets out targets for recycling and landfilling. Of the 20 million tonnes of waste produced annually in Scotland only 2.9 million (15%) is household waste.

There have been significant increases in recycling rates.

Protecting Natural Resources and Enhancing the Environment

CHALLENGES

- To protect, enhance and where necessary restore species and habitats
- To protect and enhance the water environment including coastal and river systems
- To protect the environment from pollution
- To protect and use soils in a sustainable way
- To protect, enhance and where necessary restore landscape character local distinctiveness and scenic value
- To protect enhance and create green spaces important for recreation and biodiversity

Biodiversity

Habitat Action Plans (and associated habitats)	
Habitat Action Plan name	**Prioritised Habitats**
Coastal HAP	Coastal sand dunes* Coastal vegetated shingle* Coastal and flood plain grazing marsh* Coastal salt marsh* Maritime cliffs and slopes* Saline lagoons* Mudflats* Coastal scrub and cliff woodland Coastal grasslands
Raised Bog HAP	Lowland Raised Bog*

*UK BAP Priority Habitat
Source: Ayrshire Biodiversity Action Plan

Key Species with Action Plans	
Species	**Action Plan name**
Water vole	Water vole (Arvicola terrestris)
Farmland Birds	Skylark (Alauda arvensis) Corn bunting (Miliaria calandra) Eurasian tree sparrow (Passer montanus) Grey partridge (Perdix perdix) Reed bunting (Emberiza schoeniclus) Common linnet (Carduelis cannabina)

Source: Ayrshire Local Biodiversity Action Plan, 2008

LBAP

In 1992 the United Kingdom Government signed the Convention on Biological Diversity at the Earth Summit in Rio. There was recognition of the need to protect the biodiversity of the planet from dangers such as pollution, global warming, unchecked economic growth, exploitation of natural resources and ozone depletion.

The UK Government recognized action must be taken at both national and local levels and a framework of Local Biodiversity Action Plans (LBAPs) was implemented to co-ordinate local action to conserve biodiversity.

In Ayrshire the LBAP was completed in 2001 and an action plan for 2001-2005 was drawn up. The Plan was prepared by the (then) Ayrshire Biodiversity Group who remained in place to oversee its implementation. The original Ayrshire LBAP provided a major assessment of Ayrshire's biodiversity and was a valuable tool for directing conservation effort.

Since its publication the Scottish Biodiversity Strategy has been published and the Conservation (Scotland) Act 2004 has come into force. It places a duty on all local authorities and statutory bodies to further conservation and biodiversity.

A review of progress of the Ayrshire LBAP in 2007 highlighted shortcoming which are now being addressed throught the recently published Ayrshire Biodiversity Action Plan. This sets out agreed action on a number of urgent conservation issues illustrated by the table opposite. Progress on these actions will be revised in 2011.

A framework has been set for the protection of habitats and species in Ayrshire. A revised Action Plan is being implemented.

Water Quality

River and Coastal

The Water Framework Directive, implemented in Scotland through the Water Environment and Water Services (Scotland) Act 2003, establishes a framework for the management and protection of Scotland's natural water environment. In line with the Directive, the key mechanism for ensuring integrated action is the river basin management planning system. A River Basin Management Plan has been developed for the whole of Scotland and includes rivers, lochs, estuaries and coastal waters out to three nautical miles. An Area Management Plan has been prepared for the Clyde Area and includes a plan summary, catchment profiles and an action plan. Targeted efforts are being directed toward the North Ayrshire streams Doon, Garnock, Ayr and Irvine river catchments. In 2009 three of the monitored bathing beaches in Ayrshire failed. These 'fails' were attributed to diffuse urban and rural drainage.

Monitored Bathing Waters						
Beach	**2000**	**2005**	**2006**	**2007**	**2008**	**2009**
Girvan	M	M	M	F	M	M
Maidens	F	M	M	M	M	M
Culzean	M	G	G	G	G	G
Heads of Ayr	M	G	M	G	M	F
Ayr (South Beach)	F	M	M	F	M	M
Prestwick	M	M	M	F	M	M
Troon (South Beach)	F	G	M	G	M	M
Irvine	M	M	M	F	M	F
Saltcoats/Ardrossan	F	M	M	M	F	F
Seamill	F	F	G	M	M	M
Largs (Pencil Beach)	M	M	M	M	M	M
Millport Bay	M	M	M	G	M	M
Fails	5	1	0	4	1	3
% of Total	42	8	0	33	8	25

Notes: G-Guidance, M-Mandatory, F-Fail
Source: SEPA, Scottish Bathing Waters, 2009

Significant improvements but water quality remains a concern.

Air Pollution

Concentration & Emissions of Air Pollution

The Environment Act of 1995 established the requirement for a national Air Quality Strategy as a framework for air quality. The strategy proposed standards for eight major pollutants comprising Benzene,1.3-Butadiene,Carbon Monoxide, Lead, Nitrogen Dioxide, PM10 (particulates) and Sulphur Dioxide. Part IV of the act also requires local authorities to assess the air quality of their area.

The addendum to the Air Quality Strategy supplements the existing air quality objectives and sets new long-term objectives up to the year 2010. Each local authority is required to continue to work towards the achievement of objectives in their area.

Councils undertake additional monitoring where necessary, for example of PM10 particulates and progress reports are published on a regular basis.

There are no Air Quality Management Areas in Ayrshire.

Pollutant	East Ayrshire	North Ayrshire	South Ayrshire
Benzene	√	√	√
1,3 Butadiene	√	√	√
Carbon Monoxide	√	√	√
Lead	√	√	√
Nitrogen Dioxide	√	√	√
PM10	√	√	√
Sulphur Dioxide	√	√	√
Nitrogen Dioxide	√	√	√

√ = All sites meet National Air Quality Strategy objectives
Source: East Ayrshire, North Ayrshire and South Ayrshire Councils Air Quality Management Progress Reports

Air Quality is good and continues to improve

Landscape

Changes in Arable and Grassland Agricultural Land (ha)	1991	2001	2007	(ha) 2009	% change 1991-2009
Crops	11,062	10,522	10,963	10,650	-3.7
Grass for mowing and grazing under 5 years	22,676	17,717	17,563	19,767	-12.8
Grass for moving and grazing over 5 years	85,057	97,332	97,231	103,354	+21.5
Rough Grazing	117,061	98,174	98,031	86,846	-25.8
Farm Woodland	3,418	6,103	8,537	17,432	+410.0
Other (roads, yards and buildings)	2,613	3,864	4,198	3,275	+25.3
Total	241,647	234,572	236,525	244,324	-0.1

Source: Scottish Agricultural Census, Scottish Government 2009

Woodland Planting in Ayrshire (ha)	2004/05	2005/06	2006/07	2007/08	2008/10
Conifers	206	147	325.3	9.0	N/A
Broad Leaves	110.5	236	334.5	142.3	N/A
OG*	70.8	89.8	110.5	35.0	N/A
Total	387.3	472.7	770.3	186.3	308+

*open space grant-aided for forest design purposes (biodiversity, landscape etc)
+figure may need to be revised. Data under review.
Source: Forestry Commission

Farm woodland and farm infrastructure have seen significant increases since 1991. Grazing land has noticeably decreased. Grant aided woodland planting has fallen sharply.

Land Cover Change

The overall change in arable and grassland agricultural land since 1991 has been relatively small, however within this figure there have been some significant changes to agricultural types. Agriculture, like other industries responds to the market and reacts to alterations in levels of subsidies. The changes that can be seen are likely to be largely attributable to this. There has been a noticeable drop in the amount of land given over to grazing. Farm woodland has increased significantly. The amount of land taken up by uses such as farm buildings has also increased.

Grant aided woodland planting has shown a significant drop since earlier monitoring periods and planting is now less than 200ha per annum.

Landscape

Landscape Protection Areas

The landscape of Ayrshire is a valuable resource and makes a significant contribution to the economic, environmental and cultural life of the area. It is difficult to put a measurement on the quality of the landscape, however there are ways of assessing it that provide a justifiable case for identifying some landscapes as particularly fine. This was how the National Scenic Area and Sensitive Landscape Character Areas were designated for extra protection. This Designation does not necessarily mean that they are more important than other landscapes but rather that they are in a condition which is worth protecting. The figures show that a significant proportion of Ayrshire is under some specialised form of environmental protection but what is not shown is that these areas are mostly some distance from the main settlements. Structure Plan policy has sought to redress this by establishing the principle of protected landscape areas around the main settlements in central Ayrshire. This protection will be implemented through the local development plan process.

	ha
National Scenic Area	24,292
Sensitive Landscape Character Areas (includes the National Scenic Area)	160,914
Greenbelt	3,468
Total Ayrshire Area	339,173

Source: Ayrshire Joint Planning Unit

Over half of Ayrshire's land area is under some form of enhanced landscape protection. The impact of renewable proposals on many value landscapes remains a concern.

Land and Soil

Land and Soil Quality

Soil remains a valuable resource and an important ecosystem. Safeguarding good quality and locally important agricultural land and extensive hill-grazing areas is of vital importance. The pressures on this resource are substantial. The recognition of the need to protect soil quality has arisen over recent years following greater research into the linkage between air, water and soil. In Ayrshire the main pressures on soil are from agricultural and foresty practices, industry and the application of organic wastes to land which threaten the current long-term sustainable use of soils.

Soil is a finite resource. SEPA have recognised that there is a lack of data on trends in soil properties which makes it impossible to assess whether current land use practices are sustainable and have recommended that a soil protection strategy should be implemented for Scotland. The European Commission have recently adopted a thematic strategy for soil protection and a soil framework directive to address soil degradation has been proposed. The Scottish Government published a "Scottish Soil Framework" in May 2009. This highlighted the importance of soils within Scotland to Scotland's economy, biodiversity, food production preserving culture and heritage and as a carbon sink and identified actions to address the threats to Scottish Soils.

Ranking of threats to soils across all soil functions at national scale

	Threats to Scottish soil
high	Climate change
	Loss of organic matter
	Sealing
	Acidification and Eutrophication
	Loss of biodiversity
	Contamination by heavy metals
	Soil erosion
	Pesticides
	Compaction and structure
low	Salinisation

Source:

"Scotland's soils are one of the nations greatest natural assets. They are valuable but vulnerable. It is important that we find effective ways to use them sustainably"

Roseanna Cunninghame
Minister for Environment, 2009

A framework for Scotland's soil has been developed.

Well Being

CHALLENGES

- To improve the well-being of existing and future residents of Ayrshire

Income within the Community

Per Head Gross Disposable Household Income (£)	1995	2007	95-07	% Change
N & E Ayrshire	7300	12,400	5,100	70
South Ayrshire	7900	13,800	5,900	75
Scotland	8200	13,600	5,400	66
UK	8600	14,300	5,700	60

Source: SLIMS

Relative Income Levels 1995-2007	% of Scottish Average		% of UK Average	
	1995	2007	1995	2007
N & E Ayrshire	89	91	84.9	87
South Ayrshire	96.3	101	91.9	96

Source: SLIMS

Average gross disposable income in parts of Ayrshire remains amongst the lowest in Scotland

Gross Disposable Income per Head

Income available to a community is a good indicator of relative wealth or poverty. Work is the main but not the only source of income. Gross Disposable Household Income (GDHI) measures the total amount of money available to each person in the average household after taking account of all types of income and allowing for financial outgoings. It is a good guide in assessing household prosperity relative to other areas.

Ayrshire GDHI is below both the Scottish and UK levels. Ayrshire as a whole has improved its position relative to Scotland over the period 1995 to 2007. GDHI in North & East Ayrshire have grown in line with the Scottish average and UK average. South Ayrshire has exceeded Scottish and UK growth and now has a higher level than the Scottish average.

Health Inequality

Life Expectancy at Birth 1995-97 & 2007-09	1995-97		2007-09		% Change 95/97 to 07/09	
	Males	Females	Males	Females	Males	Females
Ayrshire	72.5	77.8	74.8	79.6	3.2%	2.3%
Scotland	72.3	77.9	75.4	80.8	4.3%	2.8%
UK	73.7	79.1	77.9	82.0	5.7%	3.7%

Source: ONS

Life Expectancy at Birth 1995-97 & 2007-09	Males		Females		% Change		Male UK Ranking*	
	95-97	07-09	95-97	07-09	Males	Females	95-97	07-09
East Ayrshire	72.4	74.6	77.4	78.8	3.0	1.8	413	390
North Ayrshire	71.8	74.0	77.8	79.2	3.1	1.8	407	395
South Ayrshire	73.4	75.9	78.3	80.9	3.4	3.3	329	361

*2007/09 Ranked out of 404, 1995/97 Ranked out of 432
Source: ONS & GROS

Life expectancy continues to rise

Life Expectancy

Life expectancy at birth is an indicator of geographic in equalities in health and mortality. It is a good summary measure that allows comparisons between areas and over time. Life expectancy measures the average number of years a new born baby would survive if throughout its life it experienced the areas age specific mortality rates. The figure reflects mortality for those living in the area rather than those born there who live elsewhere. It does not indicate the remaining expectation of life at any given age. Life expectancy will be influenced by whole range of factors including physical and social environment, income, diet, lifestyle and genetics.

Life expectancy for both men and women continues to rise and narrow between the sexes. Ayrshire's average life expectancy for both men and women is similar to the Scottish averages but lags behind the UK, particularly for men.

While there are differences within Ayrshire, the striking difference is between Ayrshire and other parts of the UK. Ranked out of 404 local authorities on a UK wide basis for male life expectancy all 3 areas are in the bottom 10%.

Life expectancy for females within East Ayrshire is the lowest in the UK, with the exception of Glasgow City, West Dunbartonshire and North Lanarkshire.

There is a gap of ten years between Kensington and Chelsea in London and East Ayrshire.

Employment

Employment Rate

Providing opportunities for employment ensures people can improve their living standards, meet their social needs and ensure they can participate fully in the community.

In contrast being without a job for long periods of time not only results in loss of income but can lead to ill-health, stress and family breakdown. The 'employment rate' measures the proportion of the working age population who are actually in a job and is a key indicator of local economic prosperity. The employment rate in Ayrshire has risen markedly in the last ten years. This increase resulted from an increase in employed residents combined with a decline in working age population. The employment situation for Ayrshire's residents has improved markedly as improving transport links make community easier.

Since 2008 unemployment in Ayrshire has risen sharply and is currently around 17,200. A rise of over 50% since 2007. Employment rates remain below the national average.

Unemployment has risen and is above the Scotland and UK averages.

Employment Rate & Earnings, 2009

	Employment Rate	Average Weekly Earnings
Ayrshire	73%	£386
Scotland	75%	£388
GB	74%	£400

Source: SLIMS

Unemployment Rates

	2005/ 2006	2006/ 2007	2007/ 2008	2008/ 2009	2009/2 010*
East Ayrshire	6.6	6.4	5.8	9.0	9.6
North Ayrshire	8.0	6.7	6.9	10.3	10.9
South Ayrshire	5.8	5.2	5.2	7.0	8.2
Scotland	5.3	5.0	4.5	6.6	7.3
GB	5.4	5.3	5.3	7.4	7.9

Note: Unemployment rates by Local Authority
*April/March 09/10, all other years Oct/Sept
Source: SLIMS

Working Age Employment Rates (%)

	2007	2008	2009
East Ayrshire	73.1	74.6	69.8
North Ayrshire	71.5	71.8	67.0
South Ayrshire	77.2	75.4	73.0
Scotland	76.0	75.6	73.9

Employment rates cover working age (Men 16-64), Women 16-59)
Source: Annual Population Survey (Jan-Dec), 2010

Economic Opportunity

Proportion of 16-19 Age Group NEET and Scottish Rankings		
	% NEET 2008	% NEET 2008
East Ayrshire	12.9	11.7
North Ayrshire	12.8	12.0
South Ayrshire	10.1	9.6
Ayrshire	12	11.2
Scotland	8.9	8.8

Source: SLIMS

Ayrshire has significant levels of the population with the 16-19 age group not in Education, Training or Employment - these remain amongst the highest in Scotland.

Proportion of 16-19 years not in Education, Training or Employment

It's estimated that around 11% of 16-19 years are not in employment, education or training. This is among the highest level within Scotland. International comparisons show that Scotland has one of the highest NEET rates in OECD countries.

The number of 16-19 year olds that are not in employment, education or training is calculated by combining the number of:

- 16-17 year olds unemployed school leavers; and
- 18-19 year old benefit claimants.

Over 2,100 young people fall into these categories.

Education

Qualifications in the Workforce 2008			
	NVQ Level 4 & above	Below NVQ Level 4 & Above	No Qualification
Ayrshire	29%	56%	15%
Scotland	34%	53%	13%
GB	29%	59%	12%

Source: SLIMS

Degree Level Qualifications 2008		
	NVQ Level 4 & above	
	2000	2008
Ayrshire	20%	29%
Scotland	25%	34%
GB	23%	29%

Source: SLIMS

The skills within the workforce continue to improve, particularly those with degree level qualifications. This will have a positive effect on Ayrshire's economy and on peoples ability to take up improved job opportunities throughout the West of Scotland

Qualifications in the workforce

The development of a well educated workforce offers many benefits. To an economy it is important when attracting new investment to the area; to the individual, education and training broadens lifetime employment and further education opportunities. Increasingly the changing nature of employment and the potential for growth in the knowledge economy will in the future demand and depend on a highly skilled workforce able to adapt to and drive change.

The level of skills of the workforce has improved broadly in line with national levels but recently ahead of GB levels. Around half of those in work have NVQ Level 3 or above (ie Highers or above). More than one in four have degree level qualifications below the Scottish but equal with the GB average 29% average. There are however still significant numbers of the workforce with no qualifications (15%) although there are wide differences within Ayrshire – South Ayrshire is below the national average and East and North Ayrshire are signifcantly above. This impacts on employment opportunities and income levels. In 2009 88% of those with degree level qualifications (NVQ Level 4) are in work against 47% of those with no qualifications. On average people with degrees earn twice as much as those with no qualifications. This is in line with the situation nationally.

Sustainable Communities & Equity

CHALLENGES

- To promote a more inclusive society and reduce levels of poverty
- To encourage sustainable travel patterns and promote greater access to facilities
- To promote good quality design in new development and improve the quality of the built environment
- To promote safer communities
- To enhance the environment and regenerate degraded environment
- To encourage the reuse of existing land
- To enhance community “livability” by protecting, enhancing and where necessary restoring the historic environment
- To develop strong and vibrant communities by realising their potential for regeneration and growth

Communities

Area	Scotland	East Ayrshire	North Ayrshire	South Ayrshire
Proportion of Population Aged Over 60 in receipt of Pension Credit[1]	28%	34%	31%	25%
Proportion of Children Living in Out of Work Benefit Households[2]	16.7%	19.5%	21.1%	15.9%
Proportion of Working Age Population in Receipt of Key Benefits[3]	14.9%	18.3%	19.1%	14.4%
Proportion of Working Age Population in Receipt of Job Seekers Allowance[4]	4.3%	6.0%	6.7%	4.6%
Proportion of Single Adults Households with Annual Net Income of Less than 10k[5]	30%	36%	41%	26%
Proportion of S4 Pupils Gaining 5+ Awards at Level 5 or Better[6]	35%	28%	29%	41%
Proportion of Population Living within one of the 10% most Deprived Areas of Scotland[7]	9.5%	12.5%	13.9%	5.9%

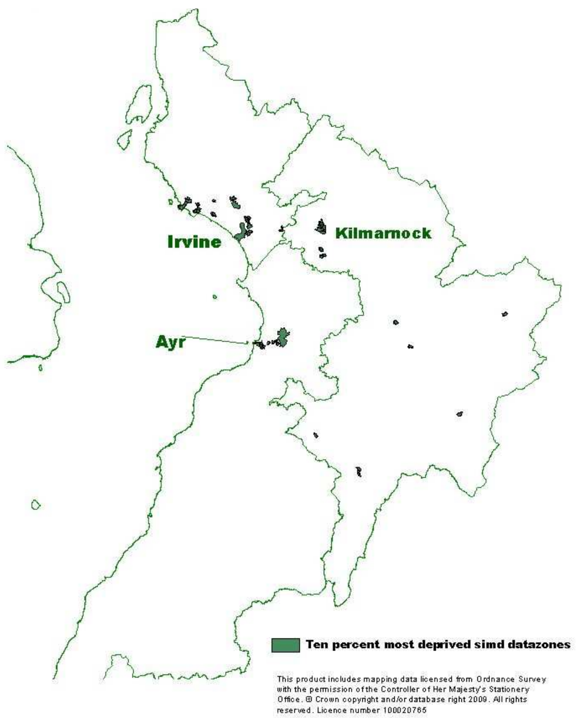
[1]Sources: DWP Pension Credit Caseload Feb 2010 and GROs Mid Year Population Estimates 2009
[2]Source: DWP 0-18 year olds living in out of work benefit households 2008 and GROs Mid Year Population Estimates 2008
[3]Source: DWP working age claimant, out-of-work statistical group August 2008
[4]Source: DWP Jobseeker's Allowance Caseload February 2010 and GROs Mid Year Popultion Estimate 2009
[5]Source: Scottish Household Survey 2007/8
[6]Source: SQA examination results 2009/10 Table 6:54 attainment by local authority
[7]Source: SIMD 2009 and GROs Mid Year Population Estimates 2007

There remains significant disparity between and within communities. 21% of children in North Ayrshire live in 'workless households'

Poverty/Deprivation

Many people in Ayrshire are excluded from participating fully in the economic, social and cultural life of the community by virtue of poverty, unemployment, low skills, bad health, poor housing and other factors. The causes of poverty in Ayrshire are many but often related to long term structural changes in the economy. East Ayrshire and North Ayrshire have persistently performed worse than the Scottish population as a whole in respect of employment, benefit dependency, household income and other related factors. Monitoring since 2000 suggests that whilst the economic circumstances of the population have improved in absolute terms, there remains a disparity between Ayrshire and the picture for Scotland as a whole.

Scottish Index of Multiple Deprivation 2009



Mobility

Access to Facilities and Services

Access to basic services such as local supermarkets, post offices, medical facilities, etc are essential if the basic needs of the community are to be met. Providing these services in a way that is accessible to all members of the community is therefore essential. Access to these basic services is generally perceived to be good by Ayrshire residents. Access to outpatient's services however continues to be a concern for residents, particularly in North Ayrshire.

A key objective of landuse and transport planning in Ayrshire in recent years has been to improve the relative accessibility of Ayrshire with the wider west of Scotland, Scottish and UK economies. This remains a significant challenge and has only been partially successful. Recent research undertaken by SPT has illustrated that within a Strathclyde context the three Ayrshire council areas have relatively poor accessibility to jobs by both car and public transport, reflecting their geography to the main employment centres.

The majority of residents within Ayrshire perceive that they have well placed facilities and services.

Access to Facilities & Services
% of population who consider services and facilities to be conveniently located (2005/2006)

Facility	North Ayrshire	East Ayrshire	South Ayrshire	Scotland
Post Office	91	82	93	86
Bank	72	67	75	86
Grocery/Food	94	95	96	94
Chemists	92	88	91	88
Outpatients	57	68	61	52
Doctors	85	82	82	81

Source: Scottish Household Survey 2005/06

Mobility

Travel Mode: Journeys to Work not using a Car

Co-ordinated planning of land use and transport can reduce the need to travel and encourage modal shift and provide environmental benefits, particularly for journeys to work. To facilitate this it is essential that transport is considered comprehensively from the outset as part of the land-use development process.

Co-ordinated action to decrease dependence on the private car should be pursued wherever possible.

Across Ayrshire the proportion of non-car journeys to work has remained relatively constant, this in contrast to Scotland where the number of journey options appears to be increasing.

The proportion of non-car journeys to work has remained static in recent years

Journeys to Work not using a Car (%)

	1993	1997	2001	2005	2008
Ayrshire	26.7	26.5	25.7	26.9	25.3
Scotland	35	31	31	32	33

Source: SHS, Employed Adults (16+) not working from home 2007/08

Journeys to Work - Usual Method of Travel (non Car)

	2007/08
East Ayrshire	16
North Ayrshire	27
South Ayrshire	33
Scotland[1]	33

Source: SHS, November 2009

Safety

Crimes Recorded 2009-10			
	Crimes Recorded	Rate	Index (Scotland = 100)
East Ayrshire	7,967	663	102
North Ayrshire	9,313	687	106
South Ayrshire	5,688	510	78
Ayrshire	22,968	629	97
Scotland	338,028	651	100

Source: Scottish Government . Crimes recorded as rate per 10,000 of resident population

Crime

Reducing crime is an important element towards creating sustainable communities.

The information illustrates that the crime rate for North and East Ayrshire is above that of Scotland. The lowest recorded crime rate is within South Ayrshire. Almost one third of recorded crime in Ayrshire is associated with vandalism. Recorded crime has fallen by 2600 since 2007/08.

Recorded crimes are falling

Safety

Number of Road Casualties in Ayrshire by Severity 1997-2009				
	1997	2001	2007	2009*
Fatal	15	35	22	19
Serious	227	228	135	159
Slight	1189	1117	880	837
TOTAL	1,431	1,380	1,037	1,015

*Provisional figures

Road Casualties in Ayrshire (Fatal & Serious)			
	1994 - 98 (average)	2005 - 2009 (average)	Change
East Ayrshire	140	54	-86
North Ayrshire	133	66	-67
South Ayrshire	120	58	-62
Ayrshire	393	178	-215

Source: Statistical Bulletin, Transport Series TRW/2010/1 June 2010 (final figure due November 2010

Road Casualties

In general, significant improvements in road safety have been achieved in recent years, particularly regarding serious casualties. The three authorities are already working with other agencies in an effort to improve road safety and have published Road Safety Plan documents. 'Tomorrow's Roads - Safer for Everyone' (DETR, 2000), states that by 2010, the Government wishes to achieve a 40% reduction (50% children) in the numbers of people killed or seriously injured in road accidents and a 10% reduction in the slight casualty rate, compared with the average for 1994-98. In line with these targets, the three Ayrshire Councils are committed to, for example, report on and monitor accident trends, implement road safety measures at accident blackspots and promote road safety programmes. The need for intervention is increasingly important given the trends for traffic growth as illustrated previously.

Serious and fatal road accident casualties have fallen

Environmental Quality

Rating of Neighbourhood as a Place to Live

Council	Very Good	Fairly Good	Fairly Poor	Very Poor	No opinion
East Ayrshire	48	45	5	2	0
North Ayrshire	52	38	7	3	0
South Ayrshire	63	32	3	2	0
Scotland	55	39	4	2	0

Note: Scotland figure, 2009. Figures by local authority are for 2005/06, up to date figures are not available.
Source: Scottish Household Survey, 2009.

It is important to achieve an understanding of how people perceive their environment, as this is likely to encompass many of the other indicators. It also gives a qualitative dimension to indicators, which takes into account things that are harder to measure such as the quality of the built environment. The planning system has a key role in ensuring future development is of good design and creates areas where people want to live. Improving standards of development will enhance the perception the community have of their neighbourhood. Other datasets within the Scottish Household survey show a clear link between household income and how households rate their neighbourhood as a place to live.

South Ayrshire is seen by its residents as a particularly good place to live

Environmental Quality

Reuse of Vacant Land

Ongoing diversification and change within the urban environment can create areas of vacant and derelict land. There should be an onus on redeveloping this land as soon as possible to prevent it detracting from the quality of the surrounding environment. Furthermore the efficient use of land within urban areas reduces pressure to accommodate development in areas of the countryside, where it may have a greater environmental footprint.

Though some derelict and urban vacant has been brought back into use, the total area remains stable

Derelict and Urban Vacant Land

Council	Area of Derelict and Urban Land (ha)				Number of Sites (2009)
	2002	2004	2008	2009	
East Ayrshire	333	319	340	329	117
North Ayrshire	418	530	1,294	1,297	253
South Ayrshire*	156	147	119	87	39
Ayrshire	907	996	1,753	1,713	409
Scotland	10,644	10,510	10,858	10,863	4,065

Source: Scottish Vacant and Derelict Land Survey 2009 (Published January 2010)

Derelict and Urban Vacant Land Brought Back into Use Since 2007 Survey

Council	Area of Derelict and Urban Land (ha)
East Ayrshire	4
North Ayrshire	3
South Ayrshire*	27
Ayrshire	34
Scotland	324

Source: Scottish Vacant and Derelict Land Survey 2009 (Published January 2010)

Percentage of People with 0-500 metres of any Derelict Site 2009

Council	%
East Ayrshire	25.5
North Ayrshire	41.1
South Ayrshire*	22.7
Scotland	30.1

Source: Scottish Vacant and Derelict Land Survey 2009 (Published January 2010)

Historic Environment

Buildings at Risk	East	North	South	Total
At Risk	68	44	63	175
For Investigation	0	3	4	7
Restoration in Progress	4	4	2	10
Saved	32	21	20	73
Demolished	24	14	14	52

Source: Scottish Civic Trust Buildings at Risk Register 2010

Listed/Unlisted Buildings	East	North	South	Total
A listed within Conservation Areas	0	1	3	4
A listed outwith Conservation Areas	3	1	9	13
B listed within Conservation Areas	8	9	11	28
B listed outwith Conservation Areas	11	8	9	28
C(s) listed within Conservation Areas	7	8	4	19
C(s) listed outwith Conservation Areas	8	2	8	18
Unlisted within Conservation Areas	22	15	12	49
Unlisted outwith Conservation Areas	9	0	7	16
Total within Conservation Areas	37	33	30	100
Total outwith Conservation Areas	31	11	33	75
Total	68	44	63	175

Source: Scottish Civic Trust Buildings at Risk Register 2010

Buildings at Risk

The natural and built environment provides an important background against which we live and work, it reinforces local distinctiveness and defines a link between past and present. It is a finite, non-renewable resource, only partly protected by statutory and non-statutory designations. At this stage the impact of development is impossible to measure, except for the 'buildings at risk' indicator which is used as an example. In 2009/10 a resurvey of property was undertaken. This identified significant numbers of additional property. In recent years progress has been made in the restoration of previous buildings at risk, however since 1990, 52 recorded buildings have been lost, these include 18 A & B listed properties.

The lack of resources to monitor adequately the impact of development on the heritage resource remains an area of concern

Community Regeneration

House Completions	Average per annum 1997/07	2008/09
Coalfield Communities	136	154
Irvine Bay	299	314

Source: AJPU

Share of Total Ayrshire House Completions	1997/07	2007/08	2008/09
Coalfield Communities	10%	4%	13%
Irvine Bay	24%	29%	26%

Source: AJPU

House Completions+

The three Councils have identified specific regeneration priorities through their own Community planning processes and have sought to provide co-ordinated funding and action. The challenge for the joint structure plan is to give further support to community regeneration by providing both the economic and development context within which this regeneration can take place.

The number of homes built in the Irvine Bay 'priority regeneration area' has decreased in terms of absolute numbers but has remained steady in proportionate terms. The number of homes built within the Coalfield community area has increased in absolute and proportionate terms.

+A fuller analysis is presented in the annual housing monitor.

Community Regeneration

Town Centre Retail Consents

Town centres play an important role in our community. They offer a wide range of services to the community, to the visitor and provide a focus for employment, shopping and leisure facilities. Within Ayrshire the town centres are generally well integrated with the transportation network. However they often display characteristics of physical decline, a poor range of shops and services and poorly managed and maintained public areas. Focusing demand for these services and facilities toward town centres as well as promoting integrated management of them, will ensure continuing reinvestment in the urban fabric. Within the last year a significant impact has been made in Ayr Town Centre with the opening of the Ayr Central. Further monitoring will report on the implementation of further investment.

Bi-annual monitoring of location of retail outlets indicates that the majority of retail businesses are located with designated town centres. Recent new developments have tended to be in town centre or edge of town centre locations.

A significant proportion of retail expenditure is retained within town centres. The number of retail 'shops', has fallen in town centres.

% of Shops Located in Town Centres (number of retail outlets)			
Council Area	**2006**	**2008**	**2009**
East Ayrshire	70%	69%	67%
North Ayrshire	72%	70%	69%
South Ayrshire	74%	73%	71%

Source: AJPU (shops include retail warehouses)

% of Shops Located in Town Centres (floor area)			
Council Area	**2006**	**2008**	**2009**
East Ayrshire	52%	53%	51%
North Ayrshire	62%	58%	56%
South Ayrshire	66%	66%	61%

Source: AJPU (shops include retail warehouses)

Larger Scale Retail Developments Completed Since 2006					
Occupier	**Address**	**Description**	**Town Centre**	**Edge of Centre**	**Out of Centre**
Vacant	Queen's Drive, Kilmarnock	New-build retail warehouse			√
Lidl	High Glencairn Street, Kilmarnock	New-build Supermarket	√		
Tesco Extra	West Shaw Street, Kilmarnock	New-build Supermarket (under construction)		√	
Spar and Vacant	Meiklewood, Kilmarnock	Redevelopment of parade of shops to form new neighbourhood centre			√
Aldi, Argos, Halfords, Boots & Vacant	East Road, Irvine	New-build Supermarket and retail Warehouse units	√		
Asda	Harbour Road, Ardrossan	New-build Supermarket	√		
Lidl	Kilwinning Road, Dalry	New-build Supermarket			√
Tesco Express & Superdrug	Main Street, Prestwick	New-build convenience store and non-food unit	√		
Debenhams, Next, River Island, Primark, JD, H&M, Clarks, Cherry Soda & Vacant	Ayr Central, Kyle Street, Ayr	New-build shopping centre	√		
Asda	Viccarton Street, Girvan	New-build Supermarket		√	
Tesco	West Shaw Street, Kilmarnock	New-build Supermarket		√	
Sainsbury's	Ayr Road, Prestwick	New-build Supermarket			√
Aldi	Ayr Road, Prestwick	Refurbishment			√

Source: AJPU

Context

CHALLENGES

- To support sustainable economic growth
- To stabilise the population within Ayrshire and meet future housing needs

Economy

Workplace Employment in Ayrshire by Sector, 1995-2008				
Employment by Industry	Total Employment		Change 1995-2008	
	1998	2008	No.	% change
Agriculture	*	*	*	*
Utilities	*	*	*	*
Manufacturing	27,200	14,500	-12,700	-47%
Construction	10,600	6,900	-3,700	-35%
Retail & Catering	31,100	32,800	1,700	6%
Transport & Communications	6,200	7,300	1,700	17%
Financial & Business Services	9,600	13,000	3,300	35%
Public Services	31,100	41,700	10,500	34%
Other Services	5,700	7,900	2,200	38%
All Employees	125,400	128,600	3,200	3%

Source: Annual Business Inquiry 2008; Annual Employment Survey, 1995

Employment Change, 2000-2009				
	Total Employment		Change 2000-09	
	2000	2009	No.	%
Ayrshire	143,000	161,000	18,000	12.5%
Scotland	2,220,000	2,418,200	198,200	8.9%
GB	25,417,000	27,148,800	1,731,800	6.8%

Figures for Residential Employment
Source: Annual Population Survey, 2007; Local Area Labour Force Survey 2000

Working Age Employment Rates (%)			
	2007	2008	2009
East Ayrshire	73.1	74.6	69.8
North Ayrshire	71.5	71.8	67.0
South Ayrshire	77.2	75.4	73.0
Scotland	76.0	75.6	73.9

Employment rates cover working age (Men 16-64), Women 16-59)
Source: Annual Population Survey (Jan-Dec), 2010

People of working Age in Employment

In common with many of the regional economies within Europe, Ayrshire continues to undergo a restructuring of it's employment base. This has seen a shift away from manufacturing and extractive industries as the main source of employment toward sectors such as micro-electronics, telecommunications, civil aviation, computers and particularly the service sectors which now dominate the labour market.

While this transition has resulted in substantial job losses, overall employment has been growing during the last decade.

In the future it is hoped that a more diverse economy will be more resilient in the face of changes in the demand for goods and services than has been experienced in recent years.

The creation of additional jobs provides a considerable challenge for the future particularly within the sectors which offer good employment growth prospects. Worryingly employment within Ayrshire in potential growth sectors such as electronics, food and drink and life sciences have all fallen since the late 90's.

Public services in Ayrshire employ a third of the labour force and has been a key driver of the employment growth in Ayrshire creating 10,500 new jobs in the last decade.

Economy

High Technology/Tradeable Employment Sectors

If Ayrshire is to retain future competitiveness and prosperity it must continue to ensure a concentration of 'high tecnology' sectors such as pharmaceuticals, office machinery/computers, aerospace and electrical/electronic engineering as well as tradeable sectors such as tourism/cultural services, agricultural, professional and computing services.

Whilst Ayrshire currently has a relatively high proportion of employees working in high technology sectors, 3% compared to 2% nationally, there has been a substantial decline – 54% from 1999 to 2007 (net loss of 4910 jobs). This is in contrast to a 44% decline in jobs in these sectors nationally. The proportion of employment within 'tradeable' sectors has also fallen in line with national trends.

High Technology Employment	1999	2001	2003	2007
	Number (%)	Number (%)	Number (%)	Number (%)
Ayrshire	9,010 (7.6)	6,707 (5.4)	5,200 (4.3)	4,100 (3.0)
Scotland	78,993 (3.8)	61,706 (2.7)	45,600 (2.0)	35,800 (2.0)
GB	793,101 (3.2)	593,629 (2.3)	509,300 (2.0)	446,700 (2.0)

*percentage of all employment
Source: SLIMS

Tradeable Employment (%)	1997	1999	2001	2003	2005	2007
Ayrshire	36	33	29	26	25	24
Scotland	33	32	32	29	28	28
GB	35	33	32	30	29	29

'Tradeable' industries contain manufacturing, agricultural, hotels and the majority of professional and computing sciences
Source: SLIMS

There has been substantial losses of employment in key sectors of the economy.

Economy

Business Vitality

A measure of the rate at which companies form and go out of business is an important indicator of the enterprise and business activity within the economy. In general economies which have higher "birth rates" are likely to be more successful and dynamic.

As the table opposite shows the number of new VAT registerd business in 2007 was 2.5% per 1000 adults. This is higher than previous years but continues to be significantly below the UK national average. One Year 'survival rates' for firms in Ayrshire have shown steady improvement and, most recently (2006), is higher than the Scottish and UK rates at 97.3%.

VAT registrations per head of population, "business density", is also a useful measure of enterprise within the local economy. In Ayrshire"business density" was 28 per 1,000 head of population, below the Scottish figure and substantially below the average for the UK of 40. To close this gap in Ayrshire would require the formation of an additional 3,800 companies.

Company Birth Rate* (2007)	
East Ayrshire	2.3
North Ayrshire	2.4
South Ayrshire	2.9
Ayrshire	2.5
Scotland	3.4
GB	4.1

*per 1000 adults
Source: SLIMS

Company Gap in Ayrshire (2008)	VAT Registered No.	Business Per Head*	Change in the number of businesses to achieve average
Ayrshire	8,500	28	n/a
Scotland	141,900	34	1,600
GB	1,964,900	41	3,800

*Business per 1000 adults
Source: SLIMS

Recent improvements in company survival rates are a positive step in helping to grow indigenous talent & achieving improved business performance. The 'birth rate of new firms remains low.

Economy

Economic Growth GVA per head 1997-2006 (UK= 100)											
	Year										
	97	98	99	00	01	02	03	04	05	06	07
Scotland	97	96	95	94	94	94	94	94	95	96	97
East Ayrshire/ North Ayrshire	76	73	71	69	68	66	66	65	64	64	63
South Ayrshire	86	85	84	85	83	81	79	80	81	82	83
UK	100	100	100	100	100	100	100	100	100	100	100

Source: SLIMS

GVA per employee 1995—2007 (productivity)	1995	2007
East & North Ayrshire	£28,500	£40,300
South Ayrshire	£24,900	£38,700
Ayrshire	£27,200	£39,700
Scotland	£26,300	£41,200
Great Britian	£27,400	£45,800

Source: SLIMS

Economic Output

Growth in output (GVA) is the principal measure of the wealth created within an economy. It is a key indicator of economic prosperity. The total GVA of Ayrshire is estimated to be around £4.9bn, equivalent to 5% of GDP for Scotland.GVA grew at under 0.7% per annum in the last 10 years. This is significantly below the Scottish average of over 2.3% and further behind the UK average of just under 3%. The poor relative performance of Ayrshire over the period 1997 to 2007 is shown by GVA per head falling from 76% of the UK figure in 1997 to 63% in 2007 for East & North Ayrshire and 86% to 83% for South Ayrshire.

GVA per employee is a measure of productivity, improvements in productivity are central to sustained economic growth.

The figure for Ayrshire is below both the comparable Scottish figure but below the equivalent GB figure. Productivity in the industrial sector grew by over 60% in the decade 1997/2007, much higher than the figure for services (33%).

GDP per head is below the Scottish and UK average

Economy

	Year	Council Area Expenditure Estimate (£millions) (2001 constant prices)			
		East	North	South	Ayrshire
Convenience Expenditure	2009	193	269	236	698
	2015	200	278	244	721
Non-Bulky Comparison	2009	135	146	260	541
	2015	155	166	296	617
Bulky Comparison	2009	88	110	128	326
	2015	112	142	165	418

Source: AJPU

In the longer term continued growth in retail expenditure is anticipated.

Retail Expenditure

National estimates of consumer spending suggest that the long term trend since the 1980s of rapid growth in spending faltered in 2009 as the recession took hold. Spending on convenience goods slowed and spending on comparison goods fell in the final half of 2009. Economic forecasts produced by Oxford economics suggest low growth rates to 2020 of 0.4% per annum for convenience spending and 3.8% for comparison goods.

The implications of lower growth in consumer spending generally and continued high rates of leakage of spending on comparison goods and increasing trends towards use of internet indicate a weakening of the town centre economies of Ayrshire.

Economy

Airport

Glasgow Prestwick International Airport is a major asset to the development of the economy in Ayrshire. Until recently, it had seen dramatic growth in the number of new routes, passengers and freight, predominantly due to the expansion of the low-cost airline market and the development of an inter-continental freight hub.

During the recession passenger numbers have fallen from a peak of 2.4m in 2007 to 1.8 million in 2009.

Total freight has also fallen significantly from around 31 million tonnes in 2007 to 13 million in 2009.

The recent draft Master Plan is optimistic about the prospects for growth at the airport, projecting a doubling of passenger numbers by 2018 and freight growth by 4% per annum.

Passengers using Glasgow Prestwick International Airport has fallen significantly during the recession

Glasgow Prestwick International Airport			
	Passengers (thousands)	Freight (tonnes)	Air Transport Movements
2005	2,388,000	29,676	20,834
2006	2,379,960	29,030	19,771
2007	2,404,250	31,574	20,859
2008	2,396,741	23,011	20,709
2009	1,804,890	13,419	15,702

Source: Infratil, 2010 (year to December)

Demographics & Households

	Households 1981-2009				
	1981	1991	2001	2009	Change 1981-2009
East Ayrshire	44,602	48,779	50,404	53,459	8,857
North Ayrshire	47,242	54,443	58,781	61,814	14,572
South Ayrshire	40,282	45,410	48,804	51,255	10,973
Ayrshire	132,126	148,632	157,989	166,528	34,402

Source: GRO Scotland

	Housing Stock 2001-2009		
	2001	2009	Net Change
East Ayrshire	52,983	56,121	+3,138
North Ayrshire	62,321	66,204	+3,883
South Ayrshire	50,754	53,424	+2,670
Ayrshire	166,058	175,749	+9,691

Source: GRO Scotland

Households

During the last 30 years there has been a sustained increase in the number of households and a significant fall in average size.

As the table illustrates between 1981 and 2009 households grew by 34,000, during this period average household size had fallen from just below 3 persons per house to just over two. The main drivers for this change have been the rapid rise in one person households, social changes and growing affluence. This change has been despite modest changes in population over this period.

Households have grown despite modest changes in population

Demographics & Households

Projected Percentage Change in Population 2008-33				
Council Area	All Ages	Children (0-15)	Working Ages	Pensionable Ages
East Ayrshire	0	-8	-7	27
North Ayrshire	-4	-15	-12	27
South Ayrshire	-1	-5	-9	21
Ayrshire	-2	-10	-9	25
Scotland	7	-2	2	31

Source: GRO Scotland

	Trends in Net Civilian Migration (persons per annum)				
		Year			
	Average 2001-05	05/06	06/07	07/08	08/09
East Ayrshire	-30	+12	+301	+412	+321
North Ayrshire	+36	-192	+366	+281	-218
South Ayrshire	+172	+287	+457	+235	+147
Ayrshire	+228	+107	+1124	+928	+250
Scotland	+7,418	+21,167	+26,811	+19,976	+21,695

Source: GRO Scotland

	Components of Population Change 2001-2009				
Council Area	2001	Natural Change	Migration	Other	2009
East Ayrshire	120,310	-1,167	1,049	18	120,210
North Ayrshire	135,820	-1,501	1,191	0	135,510
South Ayrshire	112,160	-3,259	2,640	-101	111,440
Ayrshire	368,290	-5,927	4,880	-83	367,160
Scotland	5,064,200	-9,572	140,036	-664	5,194,000

Source: Register General for Scotland

Demographics/migration

The scale of future population changes is uncertain at the moment because of recent increases in immigration to Scotland and the UK, as a result of EU expansion.

There are two factors which affect population change, natural change the difference between births and deaths and net migration, the net movement of people into and out of an area.

At the moment the decline in Ayrshire's population appears to have halted and is now stable. In the long term it is forecast to fall. By 2033 a quarter of the population will be of pensionable age.

Population within Ayrshire is forecast to fall and age as a result of natural change and migration

Demographics & Households

Volume & Value

The buoyancy of the private sector housing market within Scotland and Ayrshire was in recent years an important driver in the economy, supporting regeneration initiatives, providing affordable homes and funding infrastructure.

Along with the rest of Scotland, Ayrshire has seen a significant drop in the volume and value of house transactions as a consequence of the recent recession. The market has fallen by 60% since its peak in 2007/8.

This is having a direct impact on employment and regeneration aspirations.

Along with the rest of Scotland there has been a significant drop in volume and value of house sales

Volume of House Transactions

Volume	03/04	04/05	05/06	06/07	07/08	08/09	09/10	Change 08/09 - 09/10
East Ayrshire	2,433	2,641	3,093	3,436	3,431	1,923	1,390	-27.7%
North Ayrshire	3,068	3,490	3,962	4,158	4,377	2,041	1,591	-22.0%
South Ayrshire	2,984	2,895	3,108	3,090	3,392	1,804	1,587	-12.0%
Ayrshire	8,485	9,026	10,163	10,684	11,200	5,768	4,568	-20.8%
Scotland	130,320	129,278	142,947	151,315	149,958	87,148	72,486	-16.8%

Source: Registers of Scotland

Average House Price of Transaction

Price (Average)	03/04	04/05	05/06	06/07	07/08	08/09	09/10	Change 08/09 - 09/10
East Ayrshire	74,165	86,166	96,480	110,680	124,520	124,013	115,573	-6.8%
North Ayrshire	74,893	88,693	97,203	110,062	120,183	117,859	112,157	-4.8%
South Ayrshire	100,258	113,199	129,983	145,444	159,687	147,658	148,836	0.8%
Ayrshire	83,105	96,019	107,889	122,062	134,797	129,843	125,522	-3.3%
Scotland	100,921	114,924	123,706	138,945	154,356	152,450	150,869	-1.0%

Source: Registers of Scotland

Value of House Transactions

Value (millions)	03/04	04/05	05/06	06/07	07/08	08/09	09/10	Change 08/09 - 09/10
East Ayrshire	179.9	228.2	300.3	380.7	427.6	242.0	161.3	-33.3%
North Ayrshire	228.2	310.0	386.8	458.4	528.2	244.0	179.2	-26.6%
South Ayr-shire	298.6	328.0	402.7	452.7	545.0	267.9	237.4	-11.4%
Ayrshire	706.7	866.1	1,089.7	1,291.7	1,500.8	753.9	577.8	-23.4%
Scotland	13,161.7	14,875.3	17,722.0	21,068.1	23,226.3	13,459.2	10,979.5	-18.4%

Source: Registers of Scotland

Framework Indicators for a Sustainable Ayrshire

No.	Indicator	Key Objectives & Issues Addressed by Policy	Baseline Indicator	SSSNI*	SEA Objective	Sustainability Indicators		
	Sustainable Use of Resources & Climate Change							
1	Greenhouse Gas Emissions	Reduction in CO_2 emissions	CO_2 emissions	S				↑
			Transport	S	18	↓		
2	Resource Use	To conserve the use of existing energy resources and facilitate renewable energy	Domestic Water Consumption				↔	
			Gas & Electricity Consumption		11			↑
			Renewable Energy	S	12			↑
			Mineral Depletion				↔	
3	Waste	To reduce waste streams & encourage recyling	Waste Recycled	S	15			↑
	Protection Natural Resources and Enhancing the Environment							
4	Biodiversity	To protect, enhance and where necessary restore species and habitats	LBAP		4		↔	
5	Water Quality	To protect and enhance the water Environment including coastal and river systems	River Coastal	S	3 & 16	↓		
6	Air Quality	To protect the environment from pollution	Concentration & Emissions of Air Pollution	S	16			↑
7	Soil Quality	To protect and use soils in a sustainable way	Land and Soil Quality		2 & 16			↑
8	Landscape	To protect, enhance and where necessary restore landscape character local distinctiveness and scenic value	Land Cover Change		5			↑
		To protect enhance & create green spaces important for recreation and biodiversity	Landscape Protection Areas		6			↑
	Well Being							
9	Income within the Community	To improve the well-being of existing and future residents	Gross Disposable Income per head				↔	
10	Health Inequality		Life Expectancy	S				↑
11	Employment		Employment Rate					↓
12	Economic Opportunity		Proportion of 16-19 years not in Education, Training or Employment	S		↓		
13	Education		Qualifications in the Workforce					↑
	Sustainable Communities & Equity							
14	Poverty/Deprivation	To promote a more inclusive society and reduce levels of poverty	% Households with Dependant Children and no Working Adults % Pensioners in Low Income Households	S			↔	
15	Mobility	To encourage sustainable travel patterns and promote greater access to facilities	Modal Shift-Trips to Work	S			↔	
			Accessibility		13 & 14		↔	
16	Safety	To promote safer communities	Crime	S				↑
			Road Accidents					↑
17	Environmental Quality	To enhance the environment and regenerate degraded environment	Satisfaction with local area/ environmental quality/design quality	S	7			↑
		To encourage the reuse of existing land To promote good design in new development	Reuse of vacant land		10		↔	
18	Historic Environment	To enhance community '"iivability" by protecting, enhancing and where necessary restoring the historic environment	Buildings at Risk		9		↔	
19	Community Regeneration	To develop strong and vibrant communities by realising their potential for regeneration and growth	House completions				↔	
			Town centre retail consents			↓		
	Context							
20	Economy	To support sustainable economic growth	Economic Output	S			↔	
			Employment					
			High Technology/Tradeable				↔	
			Business Vitality					↑
			Retail Expenditure			↓		
			Airport Growth				↓	
21	Demographics and Households	To stabilise the population with Ayrshire and meet future housing needs	Demographics/migration	S			↔	
			Households					↑
			House Price Index			↓		

*Scotland's Sustainable Strategy National Indicator

Ayrshire - Measuring Progress Against Scotland's Sustainable Development Strategy

No.	Grouping	Indicator	Scotland	Ayrshire
1	Health Inequality	Life Expectancy (at birth)		
		Male (average age)	75.4	74.8
		Female (average age)	80.8	79.6
2	Air Quality	Number of Air Quality Management Areas (AQMA's)	20	0
3	Economic Opportunity	% of 16-19 year olds not in Education or Training	9	12
		% of People of Working Age in Employment	75	73
4	Community	Neighbourhood Satisfaction (% Very or Fairly Good)	94	95
5	Crime	Recorded Crimes (per 10,000 population)	651	629
6	Households	Childhood Poverty (% Children Living in Workless Households)	16.7	19.5 21.1 15.9
7	Waste	Municipal Waste Arisings (% Recycled)	34.3	39
8	Biodiversity	Composite Indicator of Bird Populations (1995-2008) (Bird Species in Decline)	21 out of 60	N/A
9	River Quality	Kilometres of River Identified as "poor" or "seriously polluted" (% network)		Indicator Replaced
10	Climate Change	Greenhouse Gas Emissions (CO_2 equivalent (mt))	56.1	2.7
11	Sustainable Energy	Electricity generated from Renewable Sources (% of Gross Consumption)	9 Gw* (22%)	823.5 mw*
12	Transport	Total Vehicle Kilometers (Traffic Growth Vehicle Kilometres 1998 - 2008, major roads)	11.2%	24%
13	Learning	Number of Eco-schools (% Registered/% Green Flag)	(98/31)	(99/40)
14	Economy	Economic Output: GVA per head (UK= 100)	97	63[1] 83[2]
15	Demography	Age Profile of Population (% of population of Working Age 16 - 64)		
		Males	67	65
		Females	59	56

Indicator worse than Scottish average

Indicator better than Scottish average

Indicator not available or not used

Footnote:

Indicator 4 - South Ayrshire
Indicator 6
Figures for East Ayrshire/North Ayrshire/South Ayrshire
Indicator 14
[1]East & North Ayrshire, [2]South Ayrshire
Indicator 11 - Consented Renewable Schemes

Indicators listed above are based on those published by the Scottish Government in February 2009. These seek to align with the outcomes within the UK Framework for Sustainable Development.

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Scottish Civic Trust

Scottish Renewables Forum

Scottish Water

Strathclyde Partnership for Transport