AYRSHIRE JOINT STRUCTURE PLAN 2025:

"Growing a Sustainable Ayrshire"

REPORT OF SURVEY

TECHNICAL REPORT TR05/2006

RETAIL CAPACITY ASSESSMENT

EAST, NORTH & SOUTH AYRSHIRE

2004 TO 2012

The Ayrshire Joint Structure Plan & Transportation Committee is a jointly funded partnership between East Ayrshire Council, North Ayrshire Council and South Ayrshire Council

FOREWORD

This technical report is part of the Report of Survey for the Ayrshire Joint Structure Plan. The full list of technical reports is appended to the back of this document. They are available on request, and in some instances will be subject to a minimum charge.

The purpose of these documents is to provide the reader with the evidence used in determining the policies that go to make up the structure plan. It is intended they will be updated as necessary.

Further information about the contents of this document, together with information about the Ayrshire Joint Structure Plan process and timescale can be obtained from the Ayrshire Joint Structure Plan & Transportation Committee at the address noted below.

Ayrshire Joint Structure Plan & Transportation Committee
Prestwick Municipal Chambers
15 Links Road
Prestwick
Ayrshire
KA9 1QG

Tel: 01292 673760
Fax: 01292 671455
E-Mail: AJSPmail@south-ayrshire.gov.uk

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1 INTRODUCTION

This technical note provides the methodology and detail used in the assessment of retail capacity. This report has been prepared to provide background information to the formulation of policies within the consultation draft of the Ayrshire Joint Structure Plan 2025. The retail capacity assessments within the report are an established method of outlining whether it is necessary to identify additional floor-space within the structure plan.

The purpose of this report is therefore to indicate the capacity of defined areas within Ayrshire (which relate to the administrative areas of the three Ayrshire local planning authorities) to absorb further retail floor-space over the plan period. The assessments compare the supply (turnover) of floor-space to the demand (available expenditure) for floor-space in each catchment. The results contained within this report are intended as a guide only, in order to illustrate the main shopping patterns and trends being exhibited throughout Ayrshire.

2 ASSESSMENT OF POTENTIAL CONVENIENCE AND COMPARISON CONSUMER EXPENDITURE 2004 TO 2012

The purpose of this section is to describe the methodology, data sources and assumptions used to assess future expenditure on convenience and comparison goods within each council area. Convenience goods are classed as food, alcoholic drinks, tobacco and other goods (newspapers and magazines; cleaning materials and matches) and comparison goods are classed as clothing and footwear, DIY and hardware goods, furniture and floorcoverings, audiovisual and other durable goods (radio, television, domestic appliances, etc) and other comparison goods (chemists goods, jewellery, watches, clocks, other non-durable household goods, bicycles, recreational and miscellaneous goods).

The methodology used to assess the current and future retail expenditure of the populations of East, North and South Ayrshire is summarised by the following equation:

$$\text{Expenditure} = \left(\text{Population} \times \text{Expenditure Per Capita}\right) - \text{Special Forms of Trading} - \text{Export of Expenditure} + \text{Import of Expenditure}$$

2.1 Population

The Draft Structure Plan 2025 has as one of its primary objectives the stabilisation of population at the 2005 level. For this reason, it has been assumed in the assessment of expenditure that population will be stable throughout the study period. An estimate of the population of each council area in 2004 was obtained from the GROS 2004 Mid-Year Population Estimates for local authority areas published in April 2005. Population projections were not available at the time of writing. It was assumed that there would be a modest fall in the population between 2004 and 2005, in line with recent commentary on national population trends. The population figures for 2004 were therefore rounded to the nearest 500 as shown in the following Figure. It was assumed that, thereafter, the population would remain stable.

Figure 1 - Population Estimates

	GROS 2004 Mid-Year Estimate	AJSPTC 2005 Estimate
East Ayrshire	119,720	119,500
North Ayrshire	136,020	136,000
South Ayrshire	111,850	112,000
Ayrshire	367,590	367,500

2.2 Expenditure Per Capita

Figures for expenditure on convenience goods and comparison goods per head of population in 2001 for each local authority area were obtained from estimates produced in June 2004 by MapInfo for AJSPTC. A forecast of future spending per capita was then obtained using information supplied in Mapinfo's Information Brief 04/02 on expenditure and price trends. In accordance with the analysis contained in Information Brief 04/02 growth rates of 0.9% per annum for convenience expenditure and 4.95% per annum for comparison expenditure were adopted. The growth rates in consumer spending were applied to the figures obtained for convenience and comparison goods to provide estimates of current and future spending from 2001 to 2012 using the straight line trend projection technique.

2.3 Available Expenditure

The numbers of people in the population were multiplied by the figures for convenience and comparison expenditure to give total projected potential retail expenditures for each Council area between 2004 and 2012. The results are summarised in Figure 2 below:

Figure 2 - Expenditure Before Consideration of SFOT and Import and Export

	Convenience Expenditure 2012 (2001 Constant Prices)	**Comparison Expenditure 2012 (2001 Constant Prices)**
East Ayrshire	£220.76million	£426.22million
North Ayrshire	£247.25million	£476.97million
South Ayrshire	£211.21million	£417.71million

2.4 Adjustments for SFoT and Import and Export of Expenditure

The total potential expenditure on comparison goods was adjusted to take account of Special Forms of Trading (mail order, internet, vending machine and party plan). Following consideration of national data and recent Retail Impact Assessments it was assumed that 1.5% of convenience expenditure per annum over the period of the study will be spent in this manner. With respect to comparison goods it has been assumed that SFoT will increase from 7% between 2004 and 2007, to 10% between 2008 and 2010 and 12% between 2011 and 2012.

The total potential expenditure on convenience and comparison goods net of SFoT was further modified to take account of the flow of expenditure between the Ayrshire council areas and outwith Ayrshire. No up-to-date information was available on inflow of expenditure from outwith the structure plan area, however, it was considered that such flows would not substantially alter the outcome of the study.

The rates of import and export between the Ayrshire Councils and the export out of Ayrshire were obtained from the Ayrshire Household Shopping Survey 2003. This study was commissioned by AJSPTC and carried out by NEMS Market Research Ltd in February 2003. The study comprised a home based telephone survey of 2001 households. The import and export rates identified through the Household Shopping Survey are summarised in the following Figure.

Figure 3 - Import and Export of Convenience and Comparison Goods

Direction of Flow	Within Ayrshire				
	Convenience %	Clothes %	Electrical %	DIY %	Furniture %
East to North	8	3	10	2	13
East to South	11	31	22	19	25
North to East	5	8	12	5	7
North to South	4	15	7	10	13
South to East	8	6	9	4	6
South to North	11	4	13	9	9
	Out of Ayrshire				
From East	0	14	1	0.5	12
From North	2	35	5	4	13
From South	0	7	0	0	6

Source: AJSPTC Household Shopping Survey 2003

The effect of the adjustments for SFoT and Import/Export are summarised in Figure 4 below. A full summary of the year on year projected growth in expenditure for each individual retail goods category is contained in Appendix A.

Figure 4 - Net Available Expenditure After Consideration of SFoT and Import/Export

	Convenience 2012 (2001 Constant Prices)		
	East Ayrshire	**North Ayrshire**	**South Ayrshire**
Gross Expenditure	£220.76million	£247.25million	£211.21million
Less SFoT	£3.31million	£3.71million	£3.17million
Less Export	£25.63million	£16.78million	£24.86million
Plus Import	£17.93million	£25.28million	£21.07million
Net Expenditure	£209.69million	£252.04million	£204.25million
	Comparison 2012 (2001 Constant prices)		
Gross Expenditure	£426.22million	£476.97million	£417.71million
Less SFoT	£51.15million	£57.24million	£50.12million
Less Export	£162.62million	£192.98million	£65.689million
Plus Import	£56.42million	£41.35million	£159.27million
Net Expenditure	£268.88million	£262.38million	£465.49million

Comparison expenditure was further sub-divided into bulky and non-bulky goods. Bulky goods include furniture and floor-coverings, DIY and hardware and audiovisual and other durable goods. Non-bulky includes clothing and footwear and “other comparison”(see paragraph 2.1 above for definition). Figure 5 below summarises the expenditure projections for bulky and non-bulky comparison goods.

Figure 5 - Net Available Expenditure For Bulky and Non-Bulky Comparison

	Net Expenditure Bulky Comparison 2012 (2001 Constant Prices)	Net Expenditure Non-Bulky Comparison 2012 (2001 Constant Prices)
East Ayrshire	£104.15million	£164.72million
North Ayrshire	£131.55million	£130.83million
South Ayrshire	£147.59million	£317.89million

The results of the analysis of future expenditure are compared with the projected turnover of the existing floor-space in Section 4 to produce an assessment of future retail capacity.

3 RETAIL FLOORSPACE & TURNOVER

This section provides details of a survey of retail outlets carried out by AJSPTC in August/September 2004 and of the subsequent assessment of the theoretical turnover of the existing retail floorspace.

3.1 Floorspace

A database of retail premises was obtained from the Ayrshire Joint Valuation Board based on the valuation roll for 2003. This database was sifted to extract the retail premises. A survey of the majority (approximately 94%) of the outlets was carried out between August and September 2004. Each premise was categorised using the 1980 Retail Inquiry Business Classification scheme. The gross floor-space figures obtained from the Joint Valuation Board were converted into net measurements using the multipliers set out in Figure 6. In some instances actual surveyed net floor areas were substituted where these were available from planning application data. Supermarkets were divided into their separate convenience and comparison elements.

Figure 6 - Multipliers Used To Convert Gross Floor Space To Net

Type of Outlet	Multiplier
Large Convenience	0.6
Small Convenience	0.65
High Street Comparison	0.6
Retail Warehouse	0.8
Retail Warehouse (Electrical)	0.75

Vacant shop units were recorded. Judgements whether particular premises were vacant were made on the basis of information displayed on the premises regarding availability for let. Where premises were closed at the time of the inspection but no such information was displayed, judgements on whether these units were occupied were made on the basis of the physical condition of the premises, window displays or other such evidence. No direct enquiries were made to the owners of the premises.

3.2 Floor-space Totals

Figure 7 on the following page summarise the results of the survey work.

Figure 7 - Floorspace Summary East, North and South Ayrshire

1980 RIBC	Total Net Floor-Space September 2004 (m^2)		
	East Ayrshire	North Ayrshire	South Ayrshire
Bicycles & Prams	13	409	656
Books & Stationery	1036	609	2,442
Chemists	1851	2,192	1,472
Clothing	14,776	13,326	16,783
Footwear	1,241	1,606	2,194
Comparison Floorspace In Supermarkets	1,926	2,516	3,455
Household Textiles	524	3,548	3,156
Jewellers	257	297	1,242
Florists	568	616	419
Mixed Goods & Department Stores	5,372	8,352	16,220
Other Goods	4,155	5,448	4,703
Toys, Hobbies & Sports	1,058	359	1,717
Photographic Retailers	-	-	259
Sub-Total (non-bulky goods)	**32,776**	**39,277**	**54,719**
Furniture	6,715	3,807	6,936
Floor-coverings	1,510	935	2,872
Hardware, China & Fancy Goods	2,274	3,364	3,113
White Goods & Brown Goods	2,575	3,872	5,360
DIY	7,434	7,143	5,567
Under Construction	3,720	-	1114
Sub-Total (bulky goods)	**24,229**	**19,120**	**24,963**
Total All Comparison	**57,005**	**58,397**	**79,682**
Bakers	1,367	1,324	987
Butchers	1,083	942	1,228
Fishmongers	29	87	121
Greengrocers	287	387	50
Newsagents & Confectionery	1,594	2,456	1,659
Off-Licence	393	700	1,168
Small Convenience Stores	7,948	6,301	4,629
Supermarkets	19,056	20,220	19,793
Total Convenience	**31,755**	**32,418**	**29,634**
Not Surveyed	2,917	10,471	5,773
Vacant	9,848	7,985	12,854
Grand Total	**97,805**	**109,271**	**126,854**

3.3 Turnover To Floor Space Ratios

Turnover to floor space ratios are a key variable in the retail capacity assessment and are used to calculate a theoretical turnover for the floor-space within each council area. The main source used is the Mintel UK Retail Rankings 2005 edition. The Retail Rankings provide data on the sales turnover per square foot of net sales area (ie excluding storage and staff accommodation) for individual retailers. The Retail Rankings tend to cover large retail organisations that operate chains of stores across the UK. The information is, therefore, representative of the level of turnover per square metre that retailers can expect to achieve at the national rather than the local level. This is considered to be a fair comparator for retailers operating in the principal towns, however, lower figures have been adopted for retail premises located elsewhere (see paragraph 3.10 below).

3.4 Adjustments for Retail Price Inflation and VAT

All sales figures quoted in the Retail Rankings are in 2003 current prices and are exclusive of VAT. In order to allow for comparison with the expenditure per capita figures that were quoted in 2001 current prices, the Mintel figures were adjusted to 2001 constant prices using the deflator factor produced by the Office for National Statistics. For all comparison goods, the figures quoted in the Retail Rankings were further adjusted to account for VAT at 17.5%, which is included in the MAPINFO estimates of expenditure per head.

3.5 Sector Averages

The Retail Rankings only provide information for chain store operators and do not cover small or independent operators which form the majority of outlets in Ayrshire. TFRs for operators who are not named in Retail Rankings were estimated by calculating an average for the appropriate sector. The sector averages were obtained by averaging the turnover to floor-space ratios of companies within the convenience and comparison goods categories described in paragraph 2.1 above. Where data was available for sufficient numbers of retailers, the highest and lowest TFRs were omitted to avoid skewing the results.

3.6 Comparison Goods in Supermarkets

Separate turnover to floorspace ratios for comparison goods retailing in grocery stores were not available. The TFR for these outlets was assessed as half of the food TFR. This decision was made on the basis of information supplied in recent Retail Impact Assessments.

The sector average turnover to floor-space ratios used in the study are summarised in Figure 8.

Figure 8 - Summary Of Estimated TFRs

Type of Outlet	TFR 2004 (£'s per m^2) (2001 Constant Prices)
Supermarkets	5498
Small Convenience Stores	6243
Bakers	4461
Butchers	6243
Greengrocers	6243
Fishmongers	6243
Newsagents/Confectioners	6243
Off Licences	6895
Furniture	2296
Carpet	1181
Household Textiles	2486
White Goods and Brown Goods	6346
DIY (high street)	1510
Hardware, China and Fancy Goods & Mixed Goods	3163
Clothing	4335
Footwear	5701
Books and Stationery	4192
Photographic Retailers	6346
Cycles and Prams	3146
Jewellers	10,721
Toys, Hobby and Sports	3,883
Florists	3163
Other Durable	4234
Chemists	7573
Supermarket Comparison	50% of Food TFR

3.7 Turnover to Floorspace Ratios Outwith Main Towns

Earlier retail capacity studies undertaken by AJSPU and retail impact studies prepared in support of planning applications have estimated that the turnover to floorspace ratios of shops located outwith the main towns are considerably lower than for those located within the main towns.

In order to set TFRs on a consistent basis over all of Ayrshire, it was decided to relate the relative performance of different shopping centres to the average rateable value per square metre. Rateable value is ultimately linked to the rental value of a property and therefore the relative profitability of premises. It is notable from the following chart that there are significant differences between the average rateable value of the three main Ayrshire towns and the remaining settlements. Each point on the chart relates to the average rateable value per square metre of the towns and villages in Ayrshire. The majority of settlements have average rateable values which are less than half of those of Ayr, Kilmarnock and Irvine. There is a smaller group which have average rateable values of between 90% and 60% of the values for the main towns. For the purpose of this study it was assumed that there is a direct relationship between average rateable value and turnover. A system of three tiers was devised, reflecting the average rateable value, with each settlement being classed as teir 1, 2 or 3. For those towns in tier 1, the TFRs were given as 100% of those devised above. For tier 2, the TFRs were reduced by 25% and for tier 3, the TFRs were reduced by 60%.

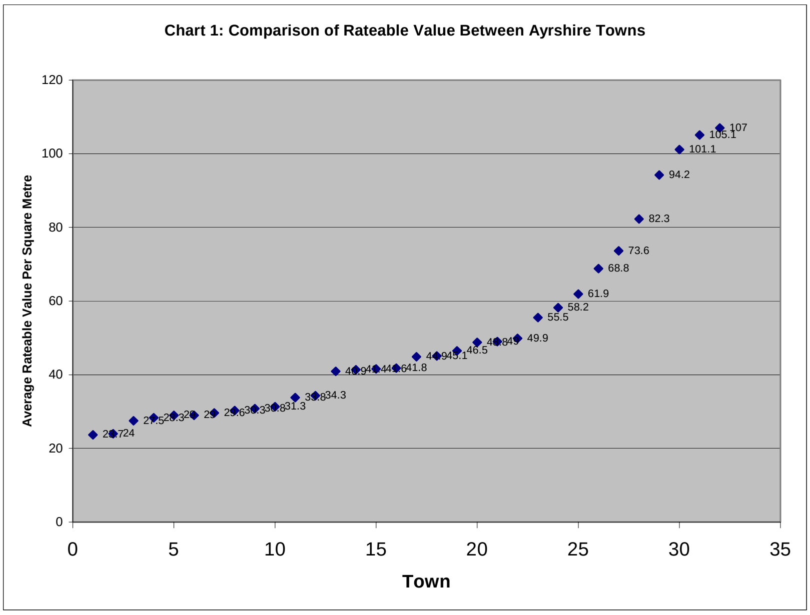

Figure 9 below summarises the average convenience and comparison TFRs produced using this method.

Figure 9 - Summary of TFRs for Tiers 1, 2 and 3

Tier	Average TFR (£ per m^2) Convenience	Average TFR (£ per m^2) Comparison
1	6008	4180
2	4506	3135
3	2403	1672

Tier 1 towns include Ayr, Irvine, Kilmarnock and Largs. Tier 2 towns include Auchinleck, Cumnock, Kilwinning, Prestwick, Saltcoats, Stevenston, Stewarton and Troon. Tier 3 includes all other communities.

3.8 Turnover

The appropriate Turnover To Floor-space Ratios were applied to the floor area of each individual outlet identified in the survey to produce an estimate of the theoretical level of turnover. The total turnover for convenience and comparison retail outlets for each council area, excluding recently completed and allocated and approved development sites, are summarised in Figure 10, below. It should be noted that the theoretical turnover derived from this type of study is used as a benchmark against which to judge whether the current level of provision of floor-space is likely to result in businesses, generally, “over-trading” or “under-trading”. Where the study indicates “over-trading” conditions are likely to exist, this implies that there is additional capacity for floor-space.

Figure 10 - Total Turnover 2004 By Council Area

	Convenience T/O 2004	Comparison T/O Bulky	Comparison T/O Non-Bulky
East Ayrshire	£211.34million	£56.23million	£125.15million
North Ayrshire	£190.37million	£44.82million	£150.18million
South Ayrshire	£196.09million	£68.33million	£216.17million

Notes: T/O = turnover £million (2001 constant prices)
Excludes recently completed, approved and allocated sites

3.9 Turnover of Retail Developments Completed Between 2003 and August 2005

A number of retail premises were built between the publication of the 2003 Valuation Roll and the time that the capacity assessment was carried out. Assessments of the turnover of these premises were made using the method described above and results are summarised in the Figure below.

Figure 11 - Recently Completed Retail Developments

	Category of Goods	Net Floorarea (m^2)	Estimated Turnover 2004 (2001 Constant Prices)
East Ayrshire	Bulky Comparison	3720	£6 million
North Ayrshire	Convenience	2268	£21 million
South Ayrshire	Bulky Comparison	1114	£2 million
South Ayrshire	Non-Bulky Comparison	4358	£13 million

3.10 Future Projections

The turnover totals derived from the survey of shops were projected from 2004 to 2012. The key variable used in this part of the assessment is the rate of change in the efficiency of retail floor-space, in real terms. Experian Retail Planner Briefing Note 2.2 suggests that at the national level figures of 0.75% per annum for convenience floorspace and 2.0% to 2.5% per annum for comparison floorspace are appropriate for forecasting purposes.

The total turnover in 2004 derived from Figures 10 and 11 was projected to 2012 using the efficiency ratios detailed in paragraph 3.16. It should be noted that the proportion of floor-space that was vacant in 2004 was assumed to remain constant. In some instances, in particular towns, it would desirable to reduce the level of vacant floor-space and, therefore, some of the additional capacity identified in this study may be met through reuse of vacant floorspace. Figure 12 below summarise the projected turnover of retail floorspace in 2012 for each local authority area.

Figure 12 - Projected Turnover of Existing Floorspace 2012 (including recently completed floor-space)

	Retail Category	Projected Turnover 2012 of Floorspace Existing in Sept 2004	Projected Turnover of Floorspace completed 2003/2005	Total Projected Turnover 2012*
East Ayrshire	Convenience	£224.36million	-	£224.36million
	Non-bulky comparison	£149.53million	-	£149.53million
	Bulky Comparison	£67.18million	£7.03million	£74.21million
North Ayrshire	Convenience	£202.10million	£21.93million	£224.03million
	Non-bulky comparison	£179.44million	-	£179.44million
	Bulky Comparison	£53.55million	-	£53.55million
South Ayrshire	Convenience	£208.17million	-	£208.17million
	Non-bulky comparison	£258.28million	£15.93million	£274.21million
	Bulky Comparison	£81.65million	£3.05million	£84.70million

*excludes reuse of 100% of floor-space that was vacant at time of 2004 survey

The assessments of projected expenditure and turnover of the existing floorspace are used in the following section to assess the capacity for retail floorspace in 2012.

4 CAPACITY ASSESSMENT

This sections draws together the analysis of future expenditure and turnover of the existing floorspace, to produce an assessment of the future floorspace potential. The design year chosen for the assessment was 2012 and it was considered that longer term projections would be too unreliable.

4.1 Methodology

The potential for future additional retail floorspace is assessed by comparing the projected expenditure available within each "catchment area" with the theoretical turnover of the existing floor space if all businesses were operating at UK average turnover per square metre (as adjusted, see section 3). Where the projected expenditure exceeds the projected turnover of the existing floor-space this implies that there is potential for additional floorspace.

4.2 Convenience Capacity Assessment

Figure 13 - Difference Between Convenience Expenditure and Turnover 2012

	Value of Expenditure 2012	Turnover of Existing Floorspace 2012	Difference £million
East Ayrshire	£209.69million	£224.36million	-£14.67million
North Ayrshire	£252.04million	£224.03million	+£28.01million
South Ayrshire	£204.25million	£208.17million	-£3.91million

Note: all prices are quoted as 2001 constant prices

In order to provide some indication of the implications for land use planning, the capacity figures in Figure 13 are converted into indicative floor-areas in Figure 14 below. This was achieved by applying average turnover to floor-space ratios derived from the assessments of turnover and floor-space for each individual local authority area and projected to 2012 using the assumptions described at 3.16 above.

Figure 14 - Indicative Floor-Space – Convenience

	Difference between expenditure and turnover 2012	Indicative TFR 2012	Indicative Net Floor-space equivalent 2012 (m^2)
East Ayrshire	-£14.67million	Not applicable	Not-applicable
North Ayrshire	+£28.01million	£6459 per m^2	4336
South Ayrshire	-£3.91 million	Not applicable	Not applicable

4.3 Bulky And Non-Bulky Comparison Capacity Assessment

The following two Figures indicate the surplus of expenditure over turnover of the existing floor-space in 2012 for both bulky and non-bulky comparison goods.

Figure 15 - Difference Between Bulky Comparison Expenditure and Turnover 2012

	Value of Expenditure 2012	Turnover of Existing Floor-space 2012	Difference
East Ayrshire	£104.15million	£74.21million	+£29.94million
North Ayrshire	£131.55million	£53.55million	+£77.99million
South Ayrshire	£147.59million	£84.70million	+£62.89million

Note: all prices are quoted as 2001 constant prices

Figure 16 - Difference Between Non-Bulky Comparison Expenditure and Turnover 2012

	Value of Expenditure 2012	Turnover of Existing Floor-space 2012	Difference
East Ayrshire	£164.72million	£149.53million	+£15.19million
North Ayrshire	£130.83million	£179.44million	-£48.61million
South Ayrshire	£317.89million	£274.21million	+£43.68million

Note: all prices are quoted as 2001 constant prices

Using the same methodology as used for convenience goods, the capacity figures in Figure 15 and 16 were converted into indicative floor-areas and the results are set out in Figures 17 and 18 below.

Figure 17 - Indicative Floor-Space – Bulky Comparison

	Difference between expenditure and turnover 2012	Indicative TFR 2012	Indicative Net Floor-space equivalent 2012 (m^2)
East Ayrshire	+£29.94million	£2655 per m^2	11,275
North Ayrshire	+£77.99million	£2801 per m^2	27,847
South Ayrshire	+£62.89million	£3248 per m^2	19,365

Figure 18 - Indicative Floor-Space – Non-Bulky Comparison

	Difference between expenditure and turnover 2012	**Indicative TFR 2012**	**Indicative Net Floor-space equivalent 2012 (m^2)**
East Ayrshire	+£15.19million	4562	3330
North Ayrshire	-£48.61million	4569	na
South Ayrshire	+£43.68million	4642	9409

5 APPROVED AND ALLOCATED RETAIL DEVELOPMENT SITES

This section details those sites with planning permission or allocated through local plans for retail development that will be available to meet some or all of the forecast demand for retail floorspace over the period of the study.

5.1 Convenience

Figure 19 below details those sites allocated through local plans or with planning permission that may be available to meet demand for additional convenience floor-space over the period of the study. An assessment of the future turnover of these developments has been made using the same methodology as has been applied to the existing floor-space.

Figure 19 : Approved and Allocated Convenience Development Opportunities

Site	Status	Net Floorspace	Turnover 2012
High Glencairn Street, Kilmarnock	Consented		
Lidl High Glencairn St, Kilmarnock	Under Construction		
Total East Ayrshire		**2503**	**£16.00million**
East Road, Irvine	Local plan allocation		
Total North Ayrshire		**4738**	**£40.00million**
Old Street, Girvan	Approved		
Total South Ayrshire		**1020**	**£12.76million**

5.2 Comparison

The following Figure list those sites with consent or allocated through local plans that have potential for comparison retailing. These sites have not been identified as either bulky or non-bulky comparison as all have potential for both and the final use will depend upon the format of any proposed development. The assessment of turnover was made using the same methodology as has been used for the existing floor-space. The exceptions are the developments in Ayr and Troon that were derived from a draft capacity assessment prepared by South Ayrshire Council in 2004.

Figure 20 - Approved and Allocated Comparison Development Opportunities

Site	Status	Net Floorspace	Turnover 2012
High Glencairn Street, Kilmarnock	Consented	4480	£12.00million
Kilmarnock Town Centre Study Area	Being Investigated	Not yet known	Not yet known
Total East Ayrshire		**4480**	**£12.00million**
East Road, Irvine	Local plan allocation	13,500	£47.00million
Rivergate Centre Extn	Approved	9000	£31.00million
Total North Ayrshire		**22,452**	**£78.00million**
Afflecks, Ayr	Local plan allocation	Not yet known	Not yet known
Former Safeway, Troon	Existing building	1140	£3.50million
Ayr Central, Ayr	Under construction	14,594	£46.00million
Kyle Centre Extn	Consented	1760	£6.00million
Total South Ayrshire		**17,494**	**£55.50million**

6 SUMMARIES

Section four indicates the scale of additional retail floorspace that could be supported within each council area, assuming the patterns of consumer spending observed in 2003 and other variables remain relevant over the short to medium term. Details of those sites already with planning approval for retail development or allocated through the local plans have also been provided in section five. The capacity assessments are summarised in the following Figures together with comments on the implications for land use planning.

6.1 East Ayrshire

Figure 21 - Capacity Assessment for East Ayrshire 2012 Summary

East Ayrshire Convenience Capacity Assessment 2012	**£million 2012** (2001 constant prices)
Projected convenience expenditure	209.69
Projected turnover of existing convenience floor-space	224.36
Difference between expenditure and turnover	-14.67
Projected turnover of approved and allocated development opportunities	16.00
East Ayrshire Comparison Capacity Assessment 2012	
Projected bulky comparison expenditure	104.15
Projected turnover of existing bulky comparison floorspace	74.22
Difference between bulky comparison expenditure and turnover	+29.94
Projected non-bulky comparison expenditure	164.72
Projected turnover of existing non-bulky comparison floor-space	149.53
Difference between non-bulky comparison expenditure and turnover	+15.19
Projected turnover of approved and allocated development opportunities	12.00

In East Ayrshire, the theoretical turnover of the existing convenience floor-space exceeds the projected expenditure. This implies that there are unlikely to be opportunities for additional floor-space to accommodate the forecast growth in convenience expenditure out with existing town centres over the study period.

Having regard to both the surplus bulky and non-bulky expenditure figures, it is apparent that there are additional opportunities to those already identified. The Kilmarnock Town Centre Action Plan seeks to identify opportunities that will strengthen the role of the town centre as the focus for retailing and sites brought forward under this process will help to accommodate the forecast growth in consumer demand. There are a number of vacant retail properties within town centres throughout East Ayrshire and reuse of these will also contribute towards accommodating the surplus capacity identified through this study.

6.2 North Ayrshire

Figure 22 - Capacity Assessment For North Ayrshire 2012 Summary

North Ayrshire Convenience Capacity Assessment 2012	£million 2012 (2001 constant prices)
Projected Convenience Expenditure	252.04
Projected turnover of existing convenience floor-space	224.03
Difference between expenditure and turnover	+28.01
Projected turnover of approved and allocated development opportunities	40.00
North Ayrshire Comparison Capacity Assessment 2012	
Projected Bulky Comparison Expenditure	131.55
Projected turnover of existing bulky comparison floorspace	53.55
Difference between bulky comparison expenditure and turnover	+77.99
Projected non-bulky comparison expenditure	130.83
Projected turnover of existing non-bulky comparison floor-space	179.44
Difference between non-bulky comparison expenditure and turnover	-48.61
Projected turnover of approved and allocated development opportunities	78.00

A surplus of convenience expenditure is identified in North Ayrshire which would suggest that there is potential for further convenience floor-space within the catchment as a result of growth in expenditure. This surplus could be accommodated through existing local plan allocations and planning consents. In line with national planning policy preference will be to town centre locations.

In respect of comparison retailing, the analysis suggests that whilst there are likely to be opportunities to expand the bulky comparison floor-space, the area currently devoted to non-bulky comparison retailing is likely to be sufficient to meet the projected increase in consumer spending on these items. The opportunities already identified through the local plan and with planning consent are potentially suited to bulky goods retailing, depending upon the final format of any future development proposals.

6.3 South Ayrshire

Figure 23 - Capacity Assessment for South Ayrshire 2012 Summary

South Ayrshire Convenience Capacity Assessment 2012	£million 2012 (2001 constant prices)
Projected Convenience Expenditure	204.25
Projected turnover of existing convenience floor-space	208.17
Difference between expenditure and turnover	-3.91
Projected turnover of approved and allocated development opportunities	12.76
South Ayrshire Comparison Capacity Assessment 2012	
Projected Bulky Comparison Expenditure	147.59
Projected turnover of existing bulky comparison floorspace	84.70
Difference between bulky comparison expenditure and turnover	+62.89
Projected non-bulky comparison expenditure	317.89
Projected turnover of existing non-bulky comparison floor-space	274.21
Difference between non-bulky comparison expenditure and turnover	+43.68
Projected turnover of approved and allocated development opportunities	55.50

The results for South Ayrshire suggest that there is no capacity for additional convenience floor-space as a result of the projected level of growth in consumer spending out with existing town centres over the study period.

The analysis identifies surplus expenditure for both bulky and non-bulky comparison retailing categories. A major new shopping centre is nearing completion in Ayr town centre and it is likely that this will absorb the majority of the non-bulky surplus expenditure. Additional sites for bulky comparison retailing will require to be identified either from the existing stock of approved and allocated sites or from new sites. Consistent with national policy preference will be given to opportunities within town centre and edge of centre sites.

APPENDIX

EAST AYRSHIRE	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Type of Goods										
Food	125,182,366	126,921,777	127,828,740	128,979,198	130,140,011	131,311,271	132,493,073	133,685,510	134,888,680	136,102,678
Alcoholic Drink	22,726,560	23,042,346	23,207,003	23,415,866	23,626,609	23,839,249	24,053,802	24,270,286	24,488,719	24,709,117
Tobacco	41,479,078	42,055,430	42,355,951	42,737,155	43,121,789	43,509,886	43,901,474	44,296,588	44,695,257	45,097,514
Books	5,091,743	5,162,493	5,199,383	5,246,178	5,293,393	5,341,034	5,389,103	5,437,605	5,486,544	5,535,922
Newspapers & Magazines	8,320,653	8,436,269	8,496,553	8,573,022	8,650,179	8,728,031	8,806,583	8,885,842	8,965,815	9,046,507
Sub Total	203,048,778	205,870,144	207,341,259	209,207,331	211,090,197	212,990,008	214,906,918	216,841,081	218,792,650	220,761,784
Net of SFOT @ 1.5%	200,003,046	202,782,092	204,231,140	206,069,221	207,923,844	209,795,158	211,683,315	213,588,465	215,510,761	217,450,358
Less Leakage of Food @ 19%	23,784,650	24,115,138	24,287,461	24,506,048	24,726,602	24,949,142	25,173,684	25,400,247	25,628,849	25,859,509
Plus Import from NAC	6,989,784	7,102,822	7,165,694	7,230,185	7,295,256	7,360,914	7,427,162	7,494,006	7,561,452	7,629,506
Plus Import from SAC	9,585,524	9,730,954	9,831,700	9,920,185	10,009,467	10,099,552	10,190,448	10,282,162	10,374,702	10,468,074
			-	-	-	-	-	-	-	-
Net Potential Expenditure Convenience	192,793,705	195,500,730	196,941,073	198,713,543	200,501,965	202,306,483	204,127,241	205,964,386	207,818,066	209,688,428
Clothes & Footware	80,124,190	84,498,290	88,517,993	92,899,634	97,498,166	102,324,325	107,389,379	112,705,153	118,284,058	124,139,119
Net of SFOT @ 7% to 12%	74,515,497	78,583,409	82,321,734	86,396,659	87,748,349	92,091,892	96,650,441	101,434,638	104,089,971	109,242,425
Less Leakage @ 48%	35,767,439	37,720,037	39,514,432	41,470,397	42,119,208	44,204,108	46,392,212	48,688,626	49,963,186	52,436,364
Plus Import from North Ayrshire	6,632,339	6,960,020	6,958,997	7,303,467	7,417,731	7,784,908	8,170,261	8,574,689	8,799,156	9,234,714
Plus Import from South Ayrshire	4,263,227	4,501,625	4,730,791	4,964,966	5,042,643	5,292,254	5,554,221	5,829,155	5,981,749	6,277,846
Net Potential Expenditure Clothes & Footware	49,643,625	52,325,018	54,497,090	57,194,695	58,089,516	60,964,947	63,982,712	67,149,856	68,907,690	72,318,620
Audio visual equipment and other durables (includes domestic appliances)	35,670,803	37,618,126	39,407,673	41,358,353	43,405,591	45,554,168	47,809,100	50,175,650	52,659,345	55,265,982
Net of SFOT @ 7% to 12%	33,173,847	34,984,857	36,649,136	38,463,268	39,065,032	40,998,751	43,028,190	45,158,085	46,340,223	48,634,064
Less Leakage @ 33%	10,947,369	11,545,003	12,094,215	12,692,879	12,891,461	13,529,588	14,199,303	14,902,168	15,292,274	16,049,241
Plus Import from North Ayrshire	4,427,257	4,679,433	4,910,343	5,153,405	5,234,031	5,493,115	5,765,025	6,050,393	6,208,779	6,516,114
Plus Import from South Ayrshire	2,912,502	3,075,368	3,231,927	3,391,907	3,444,974	3,615,500	3,794,468	3,982,294	4,086,541	4,288,825

Net Potential Expenditure Audio Visual, etc	29,566,237	31,194,655	32,697,191	34,315,702	34,852,577	36,577,779	38,388,379	40,288,604	41,343,270	43,389,762
Hardware and DIY	30,131,019	31,775,917	33,287,542	34,935,275	36,664,572	38,479,468	40,384,202	42,383,219	44,481,189	46,683,008
Net of SFOT @ 7% to 12%	28,021,848	29,551,603	30,957,414	32,489,806	32,998,114	34,631,521	36,345,781	38,144,898	39,143,446	41,081,047
Less Leakage @ 21.5%	6,024,697	6,353,595	6,655,844	6,985,308	7,094,595	7,445,777	7,814,343	8,201,153	8,415,841	8,832,425
Plus Import from North Ayrshire	1,566,919	1,656,170	1,737,895	1,823,921	1,852,456	1,944,153	2,040,388	2,141,388	2,197,444	2,306,218
Plus Import from South Ayrshire	1,092,774	1,153,882	1,212,623	1,272,648	1,292,559	1,356,540	1,423,689	1,494,162	1,533,276	1,609,173
Net Potential Expenditure DIY, etc	24,656,844	26,008,060	27,252,088	28,601,066	29,048,535	30,486,437	31,995,516	33,579,294	34,458,325	36,164,012
Furniture & Floorcoverings	27,969,152	29,496,030	30,899,198	32,428,709	34,033,930	35,718,609	37,486,680	39,342,271	41,289,713	43,333,554
Net of SFOT @ 7% to 12%	26,011,312	27,431,308	28,736,254	30,158,699	30,630,537	32,146,748	33,738,012	35,408,044	36,334,948	38,133,528
Less Leakage @ 50%	13,005,656	13,715,654	14,368,127	15,079,349	15,315,268	16,073,374	16,869,006	17,704,022	18,167,474	19,066,764
Plus Import from North Ayrshire	2,034,145	2,150,010	2,256,104	2,367,781	2,404,825	2,523,864	2,648,795	2,779,910	2,917,516	2,993,890
Plus Import from South Ayrshire	1,630,916	1,722,116	1,809,785	1,899,369	1,993,388	2,092,061	2,195,618	2,304,301	2,418,364	2,538,073
Net Potential Expenditure Furniture, etc	16,670,718	17,587,780	18,434,016	19,346,500	19,713,481	20,689,299	21,713,419	22,788,233	23,503,354	24,598,727
Other Comparison	101,202,392	106,727,182	111,804,345	117,338,661	123,146,924	129,242,697	135,640,210	142,354,401	149,400,944	156,796,290
Net of SFOT @ 7% to 12%	94,118,225	99,256,279	103,978,041	109,124,954	110,832,232	116,318,427	122,076,189	128,118,961	131,472,830	137,980,736
Less Leakage @ 48%	45,176,748	47,643,014	49,909,460	52,379,978	53,199,471	55,832,845	58,596,571	61,497,101	63,106,959	66,230,753
Plus Import from North Ayrshire	8,398,684	8,927,167	9,367,685	9,831,385	9,985,199	10,479,466	10,998,200	11,542,610	11,844,770	12,431,086
Plus Import from South Ayrshire	5,585,813	5,898,169	6,198,430	6,505,252	6,607,028	6,934,076	7,277,312	7,637,539	7,837,473	8,225,428
Net Potential Expenditure Other Comparison	62,925,974	66,438,602	69,634,696	73,081,613	74,224,987	77,899,124	81,755,130	85,802,009	88,048,115	92,406,497
Total Comparison	275,097,557	290,115,545	303,916,752	318,960,631	334,749,183	351,319,267	368,709,571	386,960,695	406,115,249	426,217,954
Net of SFOT @ 7% to 12%	255,840,728	269,807,456	282,642,579	296,633,387	301,274,264	316,187,340	331,838,614	348,264,625	357,381,419	375,071,799
Less Leakage	110,921,909	116,977,302	122,542,078	128,607,911	130,620,002	137,085,693	143,871,434	150,993,070	154,945,733	162,615,547
Plus Import from North Ayrshire	23,059,345	24,372,800	25,231,023	26,479,958	26,894,241	28,225,506	29,622,669	31,088,991	31,967,665	33,482,022
Plus Import from South Ayrshire	15,485,233	16,351,160	17,183,556	18,034,142	18,380,592	19,290,431	20,245,308	21,247,451	21,857,403	22,939,345
Net Potential Expenditure All Comparison	183,463,397	193,554,115	202,515,080	212,539,577	215,929,095	226,617,586	237,835,156	249,607,996	256,260,754	268,877,619

Leakage and Import figures obtained from Ayrshire Joint Structure Plan & Transportation Committee Household Shopping Survey February 2003

NORTH AYRSHIRE	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Type of Goods										
Food	139,795,674	142,056,439	143,313,871	144,603,696	145,905,129	147,218,275	148,543,240	149,880,129	151,229,050	152,590,111
Alcoholic Drink	25,340,605	25,750,412	25,978,345	26,212,150	26,448,060	26,686,092	26,926,267	27,168,603	27,413,121	27,659,839
Tobacco	46,176,214	46,922,973	47,338,318	47,764,363	48,194,242	48,627,990	49,065,642	49,507,233	49,952,798	50,402,373
Books	5,631,246	5,722,314	5,772,966	5,824,922	5,877,347	5,930,243	5,983,615	6,037,467	6,091,805	6,146,631
Newspapers & Magazines	9,291,555	9,441,818	9,525,393	9,611,122	9,697,622	9,784,900	9,872,965	9,961,821	10,051,478	10,141,941
Sub Total Convenience	226,516,857	230,180,070	232,217,541	234,307,499	236,416,266	238,544,013	240,690,909	242,857,127	245,042,841	247,248,227
Net of SFOT @ 1.5%	223,119,104	226,727,369	228,734,278	230,792,887	232,870,022	234,965,853	237,080,545	239,214,270	241,367,199	243,539,503
Less Leakage of Food @ 11%	15,377,524	15,626,208	15,764,526	15,906,407	16,049,564	16,194,010	16,339,756	16,486,814	16,635,195	16,784,912
Plus Food Import From EAC	10,014,589	10,153,742	10,226,299	10,318,336	10,411,201	10,504,902	10,599,446	10,694,841	10,791,094	10,888,214
Plus Food Import From SAC	13,180,096	13,380,062	13,518,587	13,640,255	13,763,017	13,886,884	14,011,866	14,137,973	14,265,215	14,393,602
Net Potential Convenience Expenditure	230,936,265	234,634,965	236,714,639	238,845,071	240,994,676	243,163,628	245,352,101	247,560,270	249,788,312	252,036,407
Clothes & Footware	89,144,346	93,548,655	93,534,900	98,164,878	103,024,039	108,123,729	113,475,854	119,092,908	124,988,007	131,174,914
Net of SFOT @ 7% to 12%	82,904,242	87,000,249	86,987,457	91,293,336	92,721,635	97,311,356	102,128,268	107,183,617	109,989,446	115,433,924
Less Leakage @ 58%	48,084,460	50,460,145	50,452,725	52,950,135	53,778,548	56,440,587	59,234,396	62,166,498	63,793,879	66,951,676
Plus Import from East Ayrshire	2,235,465	2,357,502	2,469,652	2,591,900	2,632,450	2,762,757	2,899,513	3,043,039	3,122,699	3,277,273
Plus Import from South Ayrshire	2,842,152	3,001,083	3,153,861	3,309,977	3,361,762	3,528,169	3,702,814	3,886,103	3,987,833	4,185,230
Net Potential Expenditure Clothes, etc	39,897,398	41,898,690	42,158,245	44,245,078	44,937,299	47,161,696	49,496,200	51,946,262	53,306,099	55,944,751
Audio-visual equipment and other durables (includes domestic appliances)	39,670,766	41,930,404	43,999,489	46,177,464	48,463,248	50,862,179	53,379,857	56,022,160	58,795,257	61,705,622
Net of SFOT @ 7% to 12%	36,893,812	38,995,276	40,919,525	42,945,041	43,616,923	45,775,961	48,041,871	50,419,944	51,739,826	54,300,947
Less Leakage @ 24%	8,854,515	9,358,866	9,820,686	10,306,810	10,468,062	10,986,231	11,530,049	12,100,786	12,417,558	13,032,227
Plus Import from East Ayrshire	3,317,385	3,498,486	3,664,914	3,846,327	3,906,503	4,099,875	4,302,819	4,515,808	4,634,022	4,863,406
Plus Import from South Ayrshire	4,206,947	4,442,198	4,668,339	4,899,422	4,976,074	5,222,389	5,480,898	5,752,202	5,902,782	6,194,970

Net Potential Expenditure Audio Visual, etc	35,563,629	37,577,093	39,432,091	41,383,980	42,031,439	44,111,995	46,295,539	48,587,168	49,859,072	52,327,096
Hardware and DIY	33,697,176	35,616,560	37,374,083	39,224,100	41,165,693	43,203,395	45,341,963	47,586,390	49,941,917	52,414,042
Net of SFOT @ 7% to 12%	31,338,373	33,123,401	34,757,897	36,478,413	37,049,124	38,883,056	40,807,767	42,827,751	43,948,887	46,124,357
Less Leakage @ 19%	5,954,291	6,293,446	6,604,001	6,930,899	7,039,334	7,387,781	7,753,476	8,137,273	8,350,288	8,763,628
Plus Import from East Ayrshire	560,437	591,032	619,148	649,796	659,962	692,630	726,916	762,898	782,869	821,621
Plus Import from South Ayrshire	2,458,743	2,596,234	2,728,402	2,863,458	2,908,257	3,052,216	3,203,301	3,361,864	3,449,870	3,620,639
Net Potential Expenditure Hardware, etc	28,403,262	30,017,221	31,501,447	33,060,769	33,578,010	35,240,121	36,984,507	38,815,241	39,831,337	41,802,989
Furniture & Floorcoverings	31,246,472	33,026,265	34,655,968	36,371,439	38,171,825	40,061,330	42,044,366	44,125,562	46,309,777	48,602,111
Net of SFOT @ 7% to 12%	29,059,219	30,714,426	32,230,050	33,825,438	34,354,642	36,055,197	37,839,929	39,713,006	41,678,800	42,769,858
Less Leakage @ 33%	9,589,542	10,135,761	10,635,917	11,162,395	11,337,032	11,898,215	12,487,177	13,105,292	13,754,004	14,114,053
Plus Import from East Ayrshire	3,381,471	3,566,070	3,735,713	3,920,631	3,981,970	4,179,077	4,385,942	4,603,046	4,723,543	4,957,359
Plus Import from South Ayrshire	2,446,375	2,583,175	2,714,678	2,849,054	2,990,082	3,138,091	3,293,427	3,456,451	3,627,546	3,807,109
Net Potential Expenditure Furniture, etc	25,297,522	26,727,910	28,044,524	29,432,728	29,989,662	31,474,151	33,032,121	34,667,211	36,275,885	37,420,273
Other Comparison	112,885,538	119,988,810	125,909,740	132,142,272	138,683,315	145,548,139	152,752,772	160,314,034	168,249,579	176,577,933
Net of SFOT @ 7 to 12%	104,983,550	111,589,593	117,096,058	122,892,313	124,814,983	130,993,325	137,477,495	144,282,631	148,059,629	155,388,581
Less Leakage @ 58%	60,890,459	64,721,964	67,915,714	71,277,542	72,392,690	75,976,128	79,736,947	83,683,926	85,874,585	90,125,377
Plus Import from East Ayrshire	2,823,547	2,977,688	3,119,341	3,273,749	3,324,967	3,489,553	3,662,286	3,843,569	3,944,185	4,139,422
Plus Import from South Ayrshire	3,723,875	3,932,113	4,132,287	4,336,835	4,404,685	4,622,717	4,851,542	5,091,693	5,224,982	5,483,619
Net Potential Expenditure Other Comparison	50,640,513	53,777,430	56,431,972	59,225,355	60,151,945	63,129,466	66,254,375	69,533,967	71,354,211	74,886,245
Total Comparison	306,644,298	324,110,694	340,104,158	356,939,314	374,607,810	393,150,897	412,611,866	433,036,154	454,471,443	476,967,780
Net of SFOT @ 7% to 12%	285,179,197	301,422,946	311,990,988	327,434,542	332,557,308	349,018,895	366,295,330	384,426,949	395,416,588	414,017,667
Less Leakage	133,373,268	140,970,182	145,429,042	152,627,780	155,015,666	162,688,941	170,742,044	179,193,775	184,190,314	192,986,961
Plus Import from East Ayrshire	12,318,304	12,990,778	13,608,768	14,282,402	14,505,853	15,223,892	15,977,475	16,768,360	17,207,319	18,059,081
Plus Import from South Ayrshire	15,678,091	16,554,803	17,397,566	18,258,745	18,640,861	19,563,583	20,531,981	21,548,314	22,193,013	23,291,567
Net Potential Expenditure Total Comparison	179,802,324	189,998,345	197,568,280	207,347,910	210,688,356	221,117,429	232,062,742	243,549,848	250,626,605	262,381,353

Leakage and Import figures obtained from Ayrshire Joint Structure Plan & Transportation Committee Household Shopping Survey February 2003

SOUTH AYRSHIRE	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Type of Goods										
Food	119,819,053	121,636,924	122,896,250	124,002,316	125,118,337	126,244,402	127,380,602	128,527,027	129,683,770	130,850,924
Alcoholic Drink	21,669,403	21,998,167	22,225,918	22,425,951	22,627,784	22,831,434	23,036,917	23,244,250	23,453,448	23,664,529
Tobacco	38,703,640	39,290,844	39,697,628	40,054,907	40,415,401	40,779,140	41,146,152	41,516,467	41,890,115	42,267,126
Books	4,866,925	4,940,765	4,991,917	5,036,845	5,082,176	5,127,916	5,174,067	5,220,634	5,267,619	5,315,028
Newspapers & Magazines	8,111,541	8,234,608	8,319,862	8,394,741	8,470,294	8,546,526	8,623,445	8,701,056	8,779,365	8,858,380
Sub Total Convenience	193,402,320	196,336,583	198,369,285	200,154,609	201,956,001	203,773,605	205,607,567	207,458,035	209,325,157	211,209,084
Net of SFOT @ 1.5%	190,501,285	193,391,534	195,393,746	197,152,290	198,926,661	200,717,000	202,523,453	204,346,165	206,185,280	208,040,948
Less Leakage of Food @ 19%	22,765,620	23,111,016	23,350,287	23,560,440	23,772,484	23,986,436	24,202,314	24,420,135	24,639,916	24,861,676
Plus Import of Food From EAC	13,770,060	13,961,395	14,061,161	14,187,712	14,315,401	14,444,240	14,574,238	14,705,406	14,837,755	14,971,295
Plus Import of Food From NAC	5,591,827	5,682,258	5,732,555	5,784,148	5,836,205	5,888,731	5,941,730	5,995,205	6,049,162	6,103,604
Net Potential Expenditure Convenience	187,097,552	189,924,172	191,837,175	193,563,709	195,305,783	197,063,535	198,837,107	200,626,641	202,432,280	204,254,171
Clothes & Footware	76,401,926	80,674,286	84,781,209	88,977,879	93,382,284	98,004,707	102,855,940	107,947,309	113,290,701	118,898,591
Net of SFOT @ 7% to 12%	71,053,791	75,027,086	78,846,525	82,749,428	84,044,056	88,204,237	92,570,346	97,152,578	99,695,817	104,630,760
Less Leakage @ 17%	12,079,144	12,754,605	13,403,909	14,067,403	14,287,489	14,994,720	15,736,959	16,515,938	16,948,289	17,787,229
Plus Import from East Ayrshire	23,099,804	24,360,857	25,519,737	26,782,964	27,201,988	28,548,487	29,961,637	31,444,738	32,267,891	33,865,152
Plus Import from North Ayrshire	12,435,636	13,050,037	13,048,119	13,694,000	13,908,245	14,596,703	15,319,240	16,077,543	16,498,417	17,315,089
Net Potential Expenditure Clothes, etc	94,510,087	99,683,376	104,010,471	109,158,990	110,866,800	116,354,706	122,114,264	128,158,920	131,513,836	138,023,771
Audio-visual equipment and other durables (includes domestic appliances)	34,796,917	36,742,744	38,613,224	40,524,579	42,530,545	44,635,807	46,845,280	49,164,121	51,597,745	54,151,833
Net of SFOT @ 7% to 12%	32,361,132	34,170,752	35,910,298	37,687,858	38,277,491	40,172,227	42,160,752	44,247,709	45,406,016	47,653,613
Less Leakage @ 22%	7,119,449	7,517,565	7,900,266	8,291,329	8,421,048	8,837,890	9,275,365	9,734,496	9,989,323	10,483,795
Plus Import from East Ayrshire	7,298,246	7,696,669	8,062,810	8,461,919	8,594,307	9,019,725	9,466,202	9,934,779	10,194,849	10,699,494
Plus Import from North Ayrshire	2,582,567	2,729,669	2,864,367	3,006,153	3,053,185	3,204,317	3,362,931	3,529,396	3,621,788	3,801,066

Net Potential Expenditure Audio Visual, etc	35,122,496	37,079,524	38,937,209	40,864,601	41,503,935	43,558,379	45,714,519	47,977,388	49,233,329	51,670,379
Hardware and DIY	29,375,658	31,018,331	32,597,396	34,210,967	35,904,410	37,681,678	39,546,921	41,504,494	43,558,966	45,715,135
Net of SFOT @ 7% to 12%	27,319,362	28,847,048	30,315,578	31,816,199	32,313,969	33,913,510	35,592,229	37,354,044	38,331,890	40,229,319
Less Leakage @ 13%	3,551,517	3,750,116	3,941,025	4,136,106	4,200,816	4,408,756	4,626,990	4,856,026	4,983,146	5,229,811
Plus Import from East Ayrshire	5,324,151	5,614,804	5,881,909	6,173,063	6,269,642	6,579,989	6,905,698	7,247,531	7,437,255	7,805,399
Plus Import from North Ayrshire	3,133,837	3,312,340	3,475,790	3,647,841	3,704,912	3,888,306	4,080,777	4,282,775	4,394,889	4,612,436
Net Potential Expenditure Hardware, etc	32,225,833	34,024,076	35,732,251	37,500,998	38,087,707	39,973,048	41,951,714	44,028,324	45,180,888	47,417,342
Furniture & Floorcoverings	27,736,673	29,287,695	30,778,657	32,302,200	33,901,159	35,579,267	37,340,440	39,188,792	41,128,637	43,164,505
Net of SFOT @ 2% to 3%	27,181,939	28,701,941	30,163,084	31,656,156	33,223,136	34,867,681	36,593,632	38,405,016	40,306,065	42,301,215
Less Leakage @ 21%	5,708,207	6,027,408	6,334,248	6,647,793	6,976,859	7,322,213	7,684,663	8,065,053	8,464,274	8,883,255
Plus Import from East Ayrshire	6,502,828	6,857,827	7,184,064	7,539,675	7,657,634	8,036,687	8,434,503	8,852,011	9,083,737	9,533,382
Plus Import from North Ayrshire	3,777,698	3,992,875	4,189,907	4,397,307	4,466,104	4,687,176	4,919,191	5,162,691	5,418,244	5,560,082
Net Potential Expenditure Furniture, etc	31,754,258	33,525,236	35,202,806	36,945,345	38,370,015	40,269,331	42,262,663	44,354,665	46,343,772	48,511,423
Other Comparison	100,104,173	105,701,952	111,082,971	116,581,578	122,352,366	128,408,808	134,765,044	141,435,914	148,436,991	155,784,622
Net of SFOT @ 7 to 12%	93,096,881	98,302,816	103,307,163	108,420,867	110,117,129	115,567,927	121,288,540	127,292,322	130,624,552	137,090,468
Less Leakage @ 17 %	15,826,470	16,711,479	17,562,218	18,431,547	18,719,912	19,646,548	20,619,052	21,639,695	22,206,174	23,305,380
Plus Import from East Ayrshire	29,176,650	30,769,447	32,233,193	33,828,736	34,357,992	36,058,712	37,843,619	39,716,878	40,756,577	42,774,028
Plus Import from North Ayrshire	15,747,533	16,738,439	17,564,409	18,433,847	18,722,247	19,648,999	20,621,624	21,642,395	22,208,944	23,308,287
Net Potential Expenditure Other Comparison	122,194,593	129,099,223	135,542,547	142,251,903	144,477,457	151,629,091	159,134,731	167,011,900	171,383,900	179,867,403
Total Comparison	268,415,346	283,425,008	297,853,457	312,597,203	328,070,764	344,310,267	361,353,625	379,240,630	398,013,041	417,714,686
Net of SFOT @ 7% to 12%	251,013,105	265,049,642	278,542,647	292,330,509	297,975,781	312,725,582	328,205,498	344,451,670	354,364,340	371,905,375
Less Leakage	44,284,788	46,761,172	49,141,665	51,574,178	52,606,124	55,210,127	57,943,028	60,811,208	62,591,206	65,689,470
Plus Import from East Ayrshire	71,401,679	75,299,604	78,881,712	82,786,357	84,081,563	88,243,600	92,611,659	97,195,936	99,740,309	104,677,455
Plus Import from North Ayrshire	37,677,272	39,823,361	41,142,590	43,179,149	43,854,693	46,025,501	48,303,763	50,694,799	52,142,282	54,596,959
Net Potential Expenditure Total Comparison	315,807,268	333,411,434	349,425,285	366,721,837	373,305,913	391,784,556	411,177,891	431,531,197	443,655,725	465,490,318

Leakage and Import figures obtained from Ayrshire Joint Structure Plan & Transportation Committee Household Shopping Survey February 2003

Ayrshire Joint Structure Plan 2025: Growing a Sustainable Ayrshire

Publicity Statement & Summary of Consultation

1 AJSP 2025 – Results of Consultation

2 AJSP 2025 – Results of Consultation Appendix 1 - 7

Technical Reports

1 Strategic Assessment of Housing Land Requirements

2 Study of Urban Capacity within Ayrshire

3 Renewables

4 Community Profiles

5 Retail Capacity Assessment - East, North & South Ayrshire 2004 to 2012

6 New Housing – The Key to Developing a Sustainable Ayrshire

7 Distribution of Population and Development Land for Housing between Core Area, Investment Corridors and Non-Corridor Communities

Supporting Environmental Information

1 Environmental Assessment

2 An Assessment of the Impact of the AJSP on Natura 2000 (Appropriate Assessment)

Background Reports

1 Ayrshire Development Study (Drainage)

2 Housing Land Supply 2005 (Draft)

3 Sustainability Report

4 Scottish Executive Form for Objections or Representations

RETAIL CAPACITY ASSESSMENT