Your Town Audit:
Alloa
September 2015
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This report presents a summary of the Your Town Audit (YTA) for Alloa, conducted by Scotland's Towns Partnership and EKOS Economic and Social Development. The detailed YTA Framework and Data Workbook are provided under separate cover.

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

The Understanding Scottish Places (USP) data platform provides a summary analysis for Alloa and identifies eight comparator towns that have similar characteristics – Saltcoats, Arbroath, Motherwell, and Buckhaven / Methil / Methilhill / Leven, and to a slightly lesser extent Greenock, Clydebank, Whitburn and Cowdenbeath. The USP platform – www.usp.scot – describes Alloa in the following general terms:

**Alloa’s Typology:** Social and council housing are the norm in these large towns. Manufacturing and construction are the dominant forms of employment. Health and social work services are particularly active. There is a relatively high level of unemployment. Educational attainment is low. Car ownership is low, meaning that many residents in these towns are reliant on public transport.

**Alloa’s Interrelationships:** Alloa is an ‘interdependent to independent town’, which means that it has good number of assets in relation to its population. This type of town has some diversity of jobs; and residents largely travel shorter distances to work and study, although some travel longer distances. These towns attract people from neighbouring towns to access some of their assets and jobs.
Comparing Alloa to the eight towns with similar USP typology and interrelationships shows that Alloa is more independent in relation to the number and diversity of jobs, and on the distance that people travel to study and to work. It is reliant on neighbouring locations for access to GPs and hospitals, has fewer children in primary schools, and fewer people per retail outlet.

In line with a request from Clackmannanshire Council, this Alloa YTA report presents the results of our analysis using the Scottish Government’s Town Centre Toolkit – an online resource available via the USP website. The Toolkit provides advice, guidance and case studies across three thematic areas: accessible, active and attractive.

**Active, Attractive and Accessible Town Centre: Alloa Town Centre Business Improvement District**

Alloa has had a Business Improvement District covering its town centre since 2008 – as a holistic body with a ‘whole town’ approach the BID covers all three themes within the Toolkit.

After securing renewal ballot in 2013, the BID is in its second term and has pursued a range of projects to improve the appearance of the town centre and to boost economic activity and footfall. Projects have included a shopfront numbering scheme, repairing the clock on High Street and restoring traditional lampposts, and offering grants for shopfront improvements.

In 2009, the BID was instrumental in securing £2m for Alloa through the Scottish Government Town Centre Regeneration Fund, which was put towards various projects that improved the overall appearance of the town centre. This included investing in a number of different art works, shop front improvements, signage and streetscape projects. These improvements were clearly evident at the time of the audit, including the mirrored figures on the High Street and ceramic tiles, in the window of a vacant unit, on King Street. The town centre also benefits from floral displays throughout the central shopping area.

Alloa Town Centre BID has also organised and promoted a regular programme of events, including a twice yearly wedding show, a beer festival, Christmas lights switch-on, a range of children’s events throughout the year, and the visit of a Continental market.
Accessible Town Centre

Situated 8 miles east of Stirling, Alloa is the largest town in Clackmannanshire and is the administrative centre of the local authority area. The town has a retail core focused on a traditional high street, with most of its leisure and other services and a key tourist attraction on the periphery of the town centre.

The town enjoys reasonably good transport connections to central Scotland, with Glasgow around 45 minutes’ drive away, and Edinburgh approximately one hour. Road access to the county was improved in 2008 when the Clackmannanshire Bridge opened, by-passing Kincardine.

Trains run to Glasgow and Stirling each hour throughout the day, following the reopening of the Stirling to Alloa railway line in 2008. There is also rail connectivity with Edinburgh, although this usually involves changing at Stirling and takes around 1 hour 20 minutes. Although the railway line extends beyond Alloa to Kincardine, this is purely used for freight, but does establish the potential for passenger services continuing to Fife at some point in the future.

Bus services connect Alloa with surrounding towns and villages, Stirling and the district hospital in Larbert, and run frequently throughout the day from early morning until after 11pm. There is also a bus connection with Dunfermline.

National Cycle Route 76, the ‘Round the Forth’ route which has a mix of traffic free and on road cycling, passes through Alloa. The town also takes in Route 767, which runs north towards Dollar. Clackmannanshire Council maintain a register of core paths, which intersect Alloa and link it with the surrounding countryside.

In terms of connectivity, however, the town suffers from a lack of reliable 3G or 4G mobile reception. The most recent BID plan (2013-18) does, however, include a proposal to investigate the feasibility of town centre Wi-Fi. Alloa also benefits from superfast broadband, which has been available in the town since 2012.
Alloa Town Centre and Business Improvement District Areas
Active Town Centre

Population and Housing

Alloa’s total population is just over 19,000. The town centre is roughly proportional to the wider settlement, coming in at just under 1,700 people, around 9% of the town’s total inhabitants. However, the town centre population has increased by 10% over the last decade, set against a 4% increase in the town as a whole. This compares with average increases of 7% and 5% for Clackmannanshire and Scotland respectively over the past ten years.

Just over two-thirds of housing in the town centre is in flatted accommodation (67%), typically one or two bedroom and Council Tax band A/B/C. Tenure is split between social rented (41%), private ownership (39%) and private rented (20%), with a fairly considerable number of second/holiday homes (69 units). Both the town centre and wider settlement have a dwelling vacancy rate of 2.5%.

The average purchase price of a town centre dwelling is just over half that of the wider town (£64k compared with £125k) and has increased by 41% over the past ten years.

Alloa Town Centre Housing Mix
Employment

Around 47% of Alloa’s jobs are located in the town centre. National statistics record 585 businesses within Alloa as a whole, with the YTA street audit finding just under 200 within the town centre (i.e. businesses immediately visible from the street). This means there are 18.5 employees in Alloa per town centre business – fairly typical of the other towns in which audits have been undertaken, including Ayr (12), Kirkcaldy (17) and Hamilton (27).

Retail

We identified 106 retailers in the town centre, focused around High Street, Drysdale Street, Shillinghill and Mill Street. Overall vacancy in the town centre is just over 10%, considerably lower than YTA comparators Hamilton (13%), Kilmarnock (15%), Ayr (16%) and Kirkcaldy (17%). There are, however, some concentrations of vacant units around the town centre, such as on Mill Street. It may be beneficial to map vacant units, including photos, to give a better picture of where these are.

Shops within Alloa town centre typically open 9am to 5pm/5.30pm Monday to Saturday, with fewer shops and shorter hours on Sundays.
Town Centre Unit Mix

The town centre is dominated by retail, amounting to 53% of all business units. The YTA analysis is based on the following retail definitions:

- **Convenience Retail:** primarily low cost goods that are typically bought out of habit or on impulse i.e. food, drink (alcohol and non-alcohol), news, tobacco, etc – 15 convenience retailers identified in Alloa town centre;

- **Comparison Retail:** all other retail purchases comprising goods bought at infrequent intervals where consumers will compare and contrast products and prices – 52 comparison retailers identified in Alloa town centre; and

- **Retail Services:** services that consumers would expect to find in a town centre including hairdresser, beauty salon, repair of goods, hire of specialist clothing, health clinics, post office, travel agent, etc – 39 retail service operators identified in Alloa town centre.
Just under two-thirds of retailers in Alloa town centre are independent, while 34% are part of a chain. While this mix is fairly typical, Alloa’s offering of national chains is dominated by supermarkets, retail services and charity shops, with a low number of national comparison retailers such as clothes shops. In particular, there is a high incidence of charity shops (9) and hairdressers (17). In this respect, the town has similarities with Musselburgh, where a YTA Audit was carried out earlier in 2015.

A street market is held each Thursday in the car park at the foot of Candleriggs. This was underway at the time the YTA audit was undertaken, with around five stalls present, selling fruit and vegetables, meat, clothes, homewares and e-cigarettes respectively. In November 2015, funding of £25,925 was secured from the Scottish Government’s Town Centre Communities Capital Fund by Alloa Town Centre BID to develop the Alloa Market Project. The 2013-18 BID Business Plan sets out an aspiration for a weekly or monthly producers’ market, held on Saturdays, which will become a regular attraction to bring shoppers into the town centre.
The town centre has retained a number of specialist, niche and independent stores including jewellers, butchers and a florist, which have potential to draw in a loyal footfall on a regular basis, creating customers for other businesses.

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<tr>
<th>Comparison retail</th>
<th>Convenience retail</th>
<th>Retail services</th>
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<td>52</td>
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**Attractive Town Centre**

Alloa’s Co-op department store closed in 2007 and the building was demolished in 2013, with planning permission granted for a mix of residential units and flats. This development has not yet been realised, and with the site located centrally on Primrose Street, it detracts from the overall appearance of the town centre (pictured right). However, in May 2015 Clackmannanshire Council announced that it is working towards building affordable housing on the site, which will provide a significant boost to the wider regeneration efforts in the town centre. There is also an aspiration to have a mix of retailers on the site. If this faces delays, there may be potential for temporary use or landscaping to improve the visual appearance and impact of the site.

Large Tesco and Asda supermarkets are located on either side of the town centre, with a high number of car parking spaces, as well as an Aldi. A Lidl is located centrally on Mar Street, while there is also a Morrisons on the edge of the town. The most recent Clackmannanshire Local Development Plan recognises that Alloa’s convenience retail offering has reached capacity, but states that there may be opportunities to further develop its mix of comparison shops, although this may be difficult given the level of comparison goods carried by the supermarket operators.
Also of note is the large construction/DIY supply shop, Beaton’s Building Supplies, on Whins Road, north of the town centre.

The 2015 Clackmannanshire resident’s survey noted that 33% of respondents believed the area does “not have a good choice of shopping facilities” – among the highest negative rating of any question in the survey.

**Leisure**

The leisure offering in the town centre is dominated by evening economy uses, which is itself largely composed of takeaway food outlets. There are, however, a number of licensed premises spread throughout the town centre, including the relatively new development on the site of the former Thistle Brewery. This takes in a pub and restaurant, with an attractive streetscape and custom signage on Mill Road. A large brewery kettle further adds to the sense of place.

Elsewhere, the redevelopment of a prominent vacant building on Drysdale Street into a Wetherspoons pub has significantly improved the vibrancy of this section of the town centre. Its success is a good demonstration of the potential for developing evening activity in Alloa town centre.

Located just to the west of the town centre is a cluster of artists’ studios, gallery space and a café which provides opportunities to people experiencing barriers to employment. Known as the Makers’ Village, it has given a new lease of life to disused buildings in the area and demonstrates the potential of finding new uses for vacant town centre units, and generating footfall that will benefit other businesses.
Leisure Services and the Evening Economy

The council headquarters, Kilncraigs, and much of the town’s cultural and leisure assets are located within the town centre – a particular strength, as this draws in the footfall of both employees and visitors. Alloa Athletic, who won promotion to the Scottish Championship in 2013, play at the Indodrill Stadium (formerly Recreation Park), located around 10 minutes’ walk to the east of the town centre. Attendance last year averaged 876 per match. The Alloa Leisure Bowl is located on the northern edge of the town centre, while the Forth Valley College Alloa campus is to its east. The leisure centre includes a gym, swimming pool, sauna and sports hall.

The 500 capacity town hall – an attractive, listed building – is suitable for a range of uses and hosts a wide variety of events throughout the year, including concerts, shows, community events and weddings. A key asset within the town centre is the revamped Speirs Centre. This opened its doors in late 2014 as a modern concept library / community hub, following a multi-million pound refurbishment, and will draw footfall that will also make use of the town centre’s retail, leisure and service offering.

There are no hotels within the town itself, with the Royal Oak Hotel closing in 2011 and now on the Buildings at Risk Register, and the Claremont Lodge Hotel closing more recently and currently up for sale. However, two high-end hotels – plus a country house wedding venue without accommodation – are located on the northern edge of the town, both set within sizeable grounds and each advertising themselves as being suitable for weddings and events. Given the hotels’ location, they are unlikely to have much spinoff benefit for town centre retailers on a regular basis.

Attractions and Heritage

The main tourist attraction in the town centre is Alloa Tower, a medieval towerhouse open to the public and run by the National Trust for Scotland. It opens between April
and October. Clackmannanshire has a number of such towerhouses – a Tower Trail has been developed by Clackmannanshire Council to further their attraction to visitors.

Clackmannanshire also boasts a number of sculptures by the acclaimed artist Andy Scott, two of which are located in Alloa town centre. Alloa Town Centre Business Improvement District has developed an Andy Scott trail leaflet to encourage visits to the town, which includes a map and details of each sculpture.

Other key attractions in the local area include Gartmorn Dam Country Park, the Ochil Hills and Clackmannanshire's range of golf courses. An interesting historical feature of the town is the grave of John Jameson, the founder of Jameson Whisky.

Much of Alloa is covered by a conservation area, which takes in a considerable number of listed buildings, as shown on the map below.
Attractiveness Review

The YTA includes an independent review on place and quality impressions, with Alloa scoring relatively well. It was clear during the audit that much has been done over recent years to regenerate the town centre, although the quality of public realm was not necessarily consistent throughout. However, the town centre was tidy, felt safe and was well signposted.

The art works spread throughout the town centre, as well as the floral displays, are effective in improving the vibrancy of the central shopping area.

Alloa is susceptible to Scottish weather, an important factor to take into account in the design and layout of the town centre. There are some examples of this around the town centre, including the covered walkway at Maple Court and the bus stops on Shillinghill. Other areas – especially to the north and south of the central shopping area, around the ring road – are particularly exposed.

Alloa has a high number of car parking spaces in its town centre – a large amount of space around the fringes is occupied by car parks. All council operated car parks in Clackmannanshire are free of charge and appear well used. Alloa Town Centre BID is committed to protecting the free parking in the town centre. However, the car parks, roundabouts and ring road that flank much of the town centre make it less pedestrian friendly, as people need to cross busy roads to move between the railway station, college, town hall and central shopping area (pictured right), detracting from its sense of place. However, the extensive free parking also brings economic advantages and removes an element of competition with out-of-town retail.

Business confidence in the town centre (from a sample of 15 traders interviewed during the audit) is moderate, averaging at a score of 5.2 out of 10. Some cited declining footfall and trade.
Individual shop fronts and window displays were graded out of ten during the on-street audit, with a town centre average score of 7.2 for the condition of shop fronts and 7.5 for quality of window display. Alloa achieved a relatively high score compared to audits of other towns – likely indicative of its low percentage of vacant units and recent shop front improvement efforts by Alloa Town Centre BID. Both shop front and shop window scores ranged from 3 to 10.
YTA Summary and Key Points

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

Accessible Town Centre

- Alloa has good accessibility by car, with car access on virtually all streets where retail, leisure and other services are located. There are a large number of car parking spaces around the edge of the town, as well as on-street spaces. All town centre car parking is free;

- however, the open spaces left by the car parks and roads around the town centre can make it less pedestrian friendly. At some points this gives the impression of vehicles being dominant and does restrict pedestrian access e.g. extensive use of pedestrian guard rails around the edge of the town centre, or pedestrians having to skirt the edge of roundabouts;

- there is some finger post signage to guide visitors, but this is in a mix of styles, being most modern and less cluttered in the town centre than on the edges and access routes e.g. from the train station;

- bus and rail access to the town centre is frequent with good connections across the Central belt of Scotland;

- the recent public realm improvements have included cycle parking provision across the town centre and at the key access points; and

- lighting around the town centre is generally good, being predominantly white but with some traditional columns; the town centre is covered by CCTV.

Active Town Centre

- efforts should be made to utilise public space in the town centre for more cultural and civic events, boosting footfall and normalising its reputation and status as a lively hub of activity throughout the year. There is potential to consider how Alloa’s town centre businesses can further benefit from the array of cultural and social events held in Alloa Town Hall;

- there are aspirations for a greater retail mix in Alloa town centre; however, this may be challenging with four supermarkets, two of which already have a sizeable comparison offering, but there may be future opportunities that can be taken advantage of;
• protect the independent and niche traders which bring character to the town centre, and additional footfall from loyal customers; and

• continue the successful town centre focused activities and functions of Alloa Town Centre BID. Social media is particularly useful for promoting the town centre – the Alloa Live page has excellent reach in this regard.

Attractive Town Centre

• Alloa has an impressive array of art works which, alongside the floral displays supported by Alloa Town Centre BID, give a good initial impression of the town centre;

• the redevelopment of the Thistle Brewery site offers a good model for town centre regeneration in Alloa, with its attractive streetscape that combines modern rendering with a sense of the area’s heritage, and a strong overall identity focused on its brewery past;

• the prominent vacant site adjacent to the Speirs Centre detracts from the town centre – the proposed housing and retail development will be a major boost to regeneration. If this experiences delays, finding a temporary use or landscaping the area would improve the appearance of the town centre, particularly given its proximity to the new Speirs Centre;

• there are good physical assets in the town centre, notably the town hall and Speirs Centre buildings; and

• questions could be inserted into the annual residents’ survey on perceptions of Alloa and/or other town centres in Clackmannanshire, providing a useful baseline that can be measured each year.