International Ayr Show 2024: Event Impact Assessment

Report for South Ayrshire Council

May 2025

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THE INTERNATIONAL AYR SHOW FESTIVAL OF FLIGHT

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Gross Direct Spend: £7.9m

Net Direct Spend: £6.1m

Net Additional GVA: £2.9m

2-day event, held in September 2024

Total attendees 260,000

The overall experience was rated highly – 96% said it was good or very good.

99% reported that their experience at the festival has made it more likely they would return to South Ayrshire in the future.

1 Introduction

The International Ayr Show Festival of Flight is a two-day air show that takes place on the Ayr Shorefront. The main attraction is the air show itself which features a variety of different aircraft and displays.

The 2024 event took place on the Friday 6th and Saturday 7th September. As well as the air show there were also a variety of family friendly attractions on the ground including:

- A funfair.
- Local Traders market.
- A variety of street food options.
- Exhibitions from aerospace companies and educational institutions.

The event is currently Scotland's only dedicated air show and attracted a total of 260,000 attendees over the two days of the event, with 40,000 attending on the Friday and 220,000 on the Saturday.

South Ayrshire Council have commissioned EKOS to conduct an evaluation study to determine the economic impact and success of the 2024 event.

1.1 Study method

The Economic Impact assessment (EIA) has been undertaken based on eventIMPACTS guidance and using a bespoke Excel-based impact model. The impact assessment has been informed by a survey of event attendees and local businesses (during the event) and was undertaken by South Ayrshire Council (SAC).

The report is set out as follows:

- **Chapter 2** presents findings from the visitor and business surveys.
- **Chapter 3** presents findings from the Economic Impact Assessment.
- **Appendix A** presents detailed business survey analysis.
- **Appendix B** presents technical details of the Economic Impact Assessment.

2 Visitor and Business Survey

A face-to-face survey was undertaken onsite with visitors during the 6th and 7th September 2024. A total of 434 visitors were surveyed. The survey was undertaken by teachers from Prestwick Academy and volunteer Ryanair apprentices.

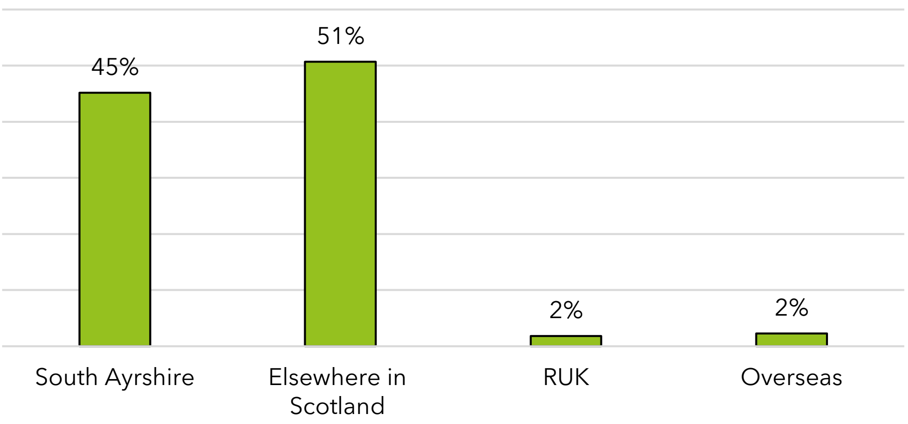
In addition, an online survey was distributed to local businesses and traders. A total of 112 local businesses and 16 traders that had stalls at the event responded.

This chapter provides full details of the visitor survey and a summary of the key findings and highlights from the business surveys. Full details of the business survey results can be found in **Appendix A**.

2.1 Visitor Feedback

Less than half (45%) of respondents live in South Ayrshire with the majority from elsewhere in Scotland, **Figure 2.1**.

Figure 2.1: Respondents by home location

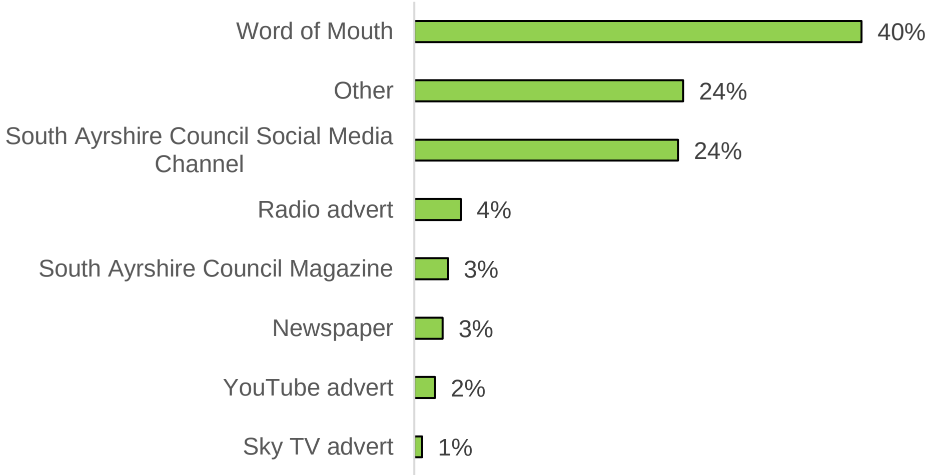


N=434

Finding out about the International Ayr Show 2024

Word of mouth (40%) was the most common way for visitors to become aware of the event. South Ayrshire Council social media channels were also important (24%). 24% of respondents reported they found out through 'other' means, however, they were not asked to specify, **Figure 2.2**.

Figure 2.2: How did you hear about the International Ayr Show 2024?

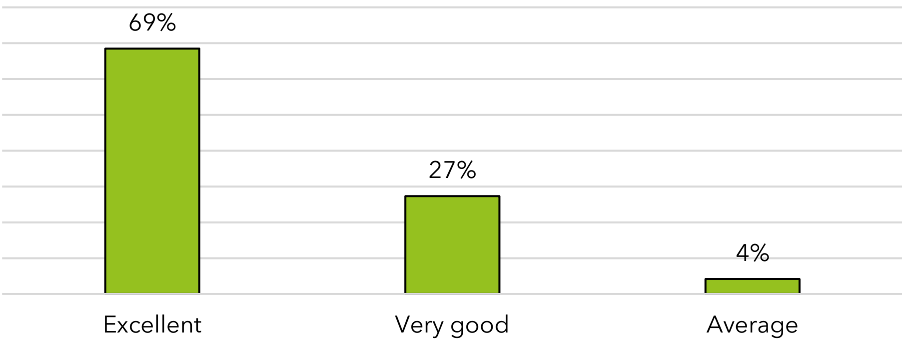


N=432.

Views on the International Ayr Show 2024

Attendees were overwhelmingly positive about the event, with 69% rating it as excellent and 27% very good, **Figure 2.3**.

Figure 2.3: How would you rate the event?



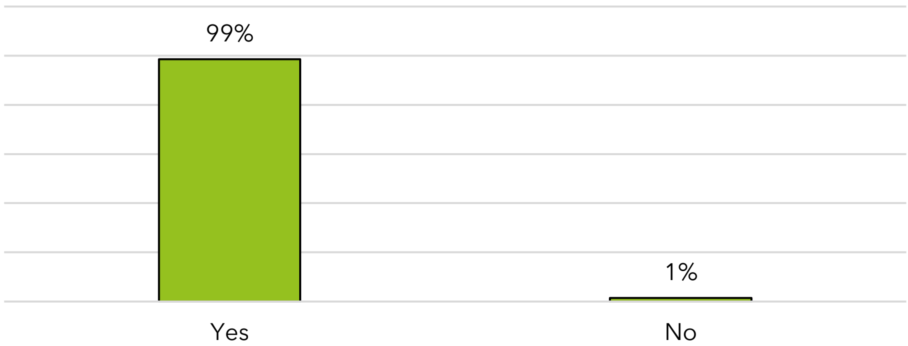
N=432

Asked to explain the reasons for their rating, the most common reasons were:

- They enjoyed the airshow (51 comments).
- A great family day out/ lots to do for kids (34 comments).
- The event was well organised (27 comments).
- There were lots of different activities (22 comments).
- There was a good atmosphere (18 comments).
- Happy that the event was free (16 comments).

The vast majority of respondents (99%) would return to South Ayrshire following their experience of the event, **Figure 2.4**. It seems likely from this result that the International Ayr Show provides a considerable benefit to tourism in South Ayrshire by encouraging repeat visitors.

Figure 2.4: Following your experience in South Ayrshire, would you return to the area?



N=432

2.1.1 Business Feedback

Business Types and Locations

- Main sectors represented: Retail (50%), Food and Drink (41%).
- Main locations: Ayr Town Centre (53%), Troon (23%), Prestwick (20%), Ayr Shore Front (4%).

Revenue Impact

- One in three (33%) of businesses saw an increase in revenue, particularly:
    - Food and Drink: 44% increased revenue.

- Accommodation: 80% reported increased revenue.

- 60% of businesses surveyed did not report any changes to their 'normal' weekend revenue.
- Many said visitors bypassed town centres on their way to the event site at the shorefront, limiting the impact it had on their business.

Comparison to Previous Years

- Around half of the surveyed businesses reported that they felt the 2023 and 2024 events were similar in terms of the quality of the offer and range of activities.
- Around one in five (19%) thought the 2024 event was better than 2023, while around one third (34%) felt that the 2023 event was better.
- Feedback from those that felt 2023 was better included congestion from traffic and a slight disconnect from the town centre.

Economic Benefit

- 44% of businesses and traders believed that the event had a positive economic impact in Ayr and across South Ayrshire.
- 54% did not think it had any notable economic benefit and felt the event could have had a greater impact if better linkages and connections were made with the town centre to encourage visitor footfall.

2.1.2 Trader Experience:

- 100% would recommend participation to other traders and most (92%) reported an overall positive experience.
- Future events could have improved signage to direct visitors to the trading stalls and improved access to the site.

3 Economic Impact Assessment

This chapter presents a summary assessment of the economic impacts generated through the International Ayr Show, Festival of Flight 2024 on the South Ayrshire economy. Full technical details of the impact assessment can be found in **Appendix B**.

Key messages are as follows.

- **Total Event Attendees: 260,000**
- **Gross Direct Spend: £7.9m**
- **Net Direct Spend: £6.1m**
- **Net GVA: £2.9m**

3.1 Approach

The Economic Impact Assessment (EIA) is based on the feedback provided by the 434 interviews onsite at the International Ayr Show 2024.

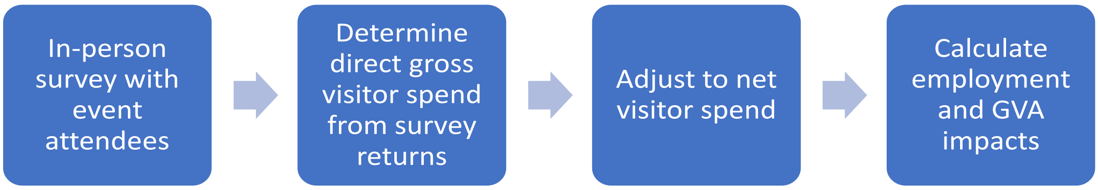
The fieldwork design and collection were undertaken by SAC using teachers from Prestwick Academy and volunteer Ryanair apprentices. The data gathered has directly informed the EIA and where there are gaps or incomplete data we have utilised benchmarks for similar events and/or data sourced from official publications.

The survey sought details on the visitors' home residence, and actual and estimated spend during attendance at the event, in the wider town and outwith the event. Spend typically covers transport, eating/drinking, accommodation, retail, and 'other'.

This data was then used to conduct an economic impact assessment in line with the eventIMPACTS methodology using a bespoke Excel model.

A simplified flowchart of the economic impact process is provided in Figure **3.1**.

Figure 3.1: Economic Impact Process



3.2 Gross Impacts

Gross impacts are determined by the responses to the survey questions around spending at the event and elsewhere in South Ayrshire.

It should be noted that respondents were not asked their exact spend, but were asked to give a range. In order to adjust these ranges to whole numbers, we took the midpoint for each. Ranges and actual values used are presented in **Table 3.1**.

Table 3.1: Conversion from Range to Values

Spending Range	Value Used in EIA
£1-£29	£15
£30-£59	£45
£60-£99	£75
£100-£199	£150
£200+	£250

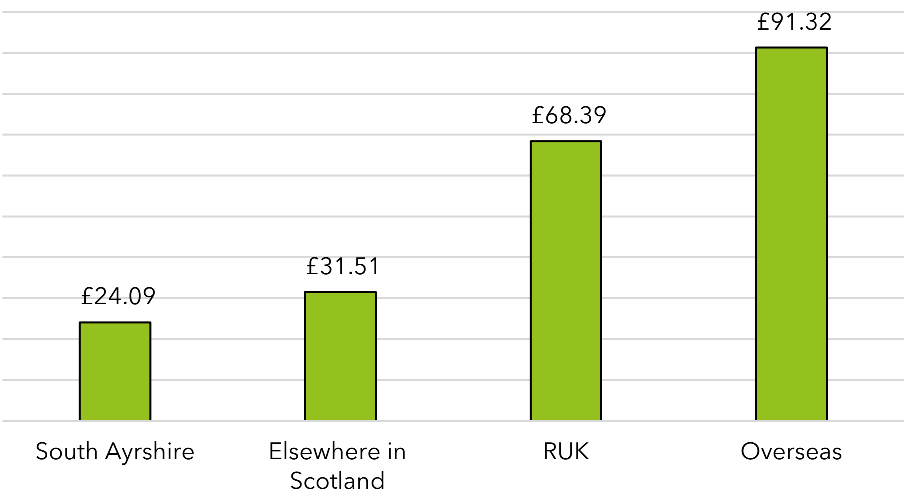
Total spend by survey respondents was £47,295 in South Ayrshire, **Figure 3.2**.

Figure 3.2: Total Spend

N=434

Respondents were asked for the total spend by their entire party. Party sizes ranged from 1 to 42, and the total population was therefore 1,551. This equates to average spend as outlined in **Figure 3.3**.

Figure 3.3: Average Spend per attendee by Place of Residence



N=434

Visitors from the rest of the UK and overseas had notably larger average spend, likely driven by additional food and drink and accommodations costs.

3.2.1 Total Visitor Numbers

Visitor numbers were estimated at 260,000 by the event organisers, with 220,000 attending on the Saturday and 40,000 attending on the Friday. We have assumed that visitors were asked about spend on the day of their visit and have therefore not made allowances for unique visitors.

3.2.2 Grossed Up Impacts

The expenditure impacts are grossed up to the total population based on the inverse of the proportion responding to the survey (e.g. a response rate of 5% generates a grossing up factor of 100%/5% = 20).

Therefore, with a total respondent population of 1,551 and a total number of unique attendees of 260,000, the impacts are grossed up by 168. Responses from different geographic areas are separately grossed up and summed.

Total gross spend/expenditure at the International Ayr Show 2024 is therefore estimated at **£7.9m** at the South Ayrshire level.

3.3 Net Impacts

The net impact is what is generated by the International Ayr Show 2024 event, adjusted for displacement, leakage, deadweight and multiplier effects.

3.3.1 Deadweight

Deadweight is a measure of the extent to which impacts would have happened anyway in the absence of the public sector (SAC) funding support for hosting the event. Deadweight was judged to be zero as the event would not have proceeded in the absence of the public sector support.

3.3.2 Leakage

Leakage assesses the level of expenditure that takes place outside the 'target' geographic area at which the economic impact is being assessed. This has been judged to be zero, as impact questions were specifically about spend/expenditure that took place within South Ayrshire.

3.3.3 Displacement

Displacement is a measure of the extent to which the event has moved expenditure from one part of the economy to another through increased competition.

Displacement is judged based upon several factors, which are:

- Their place of residence.
- The importance of the event in their decision to visit (and spend money) within South Ayrshire.

The place of residence is important, as for those residing within the geographical area of study, displacement is 100% in line with the eventIMPACTS methodology. This means that the spend of a resident of South Ayrshire would not be included at the South Ayrshire level or at higher level geographies. This is due to the assumption that their spend at the event would have taken place within that geographic area if they had not attended.

Their importance of their visit to South Ayrshire is important to determine how attributable attendee spend is to the event. If they had visited solely to attend the event then their spend would be fully attributable, if they had visited for other reasons, then spend would be partly attributable.

There was no question asked about the importance of the festival to attendees decision to visit South Ayrshire. We have therefore employed assumptions based on benchmark estimates form previous large-scale event impact assessments.

Based on these responses we have assumed the levels of displacement as set out in **Table 3.2**.

Table 3.2: Displacement (%)

	Displacement at South Ayrshire Level
South Ayrshire Resident	100%
Resident Elsewhere in Scotland	5%
Resident Elsewhere in UK	10%
Resident Overseas	15%

3.3.4 Multipliers

Multipliers relate to the impact of additional economic impact that occurs because of spending through additional income, supplier purchases, and longer-term effects.

Multipliers are sourced from the Scottish Input/ Output tables for the relevant sectors. Data is only available at the Scotland level; we have therefore adopted a conservative approach to estimating the potential multiplier effects of 33% at the South Ayrshire level.

3.3.5 Net Spend

Applying these additionality factors generates an estimated net overall spend/expenditure of £6.1m at the South Ayrshire level.

3.4 Net GVA

Organiser spend will contribute to the economic impact of the festival. In this case net organisational spend for the overall International Ayr Show 2024 event was close to break-even so overall net additional expenditure is unchanged.

We then convert the net spend figure above to GVA. GVA is a measure of economic activity and accounts for the overall value added to the economy by the event. On a basic level this is the sum of profits and wages generated.

Using the spending to GVA ratio of 48% outlined in the eventIMPACTS methodology, this equates to net additional GVA as outlined in **Table 3.3**.

Table 3.3: Net Additional Impacts

	Net Spend	Net GVA
South Ayrshire	£6.1m	£2.9m

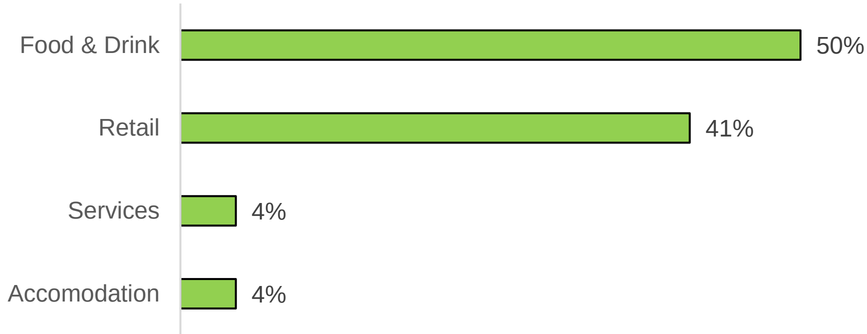
Appendix A: Business Surveys

An online survey was distributed to local businesses and traders. A total of 112 local businesses and 16 traders responded.

Local Business Survey

Most businesses that responded to the survey were retail (50%) or food and drink services businesses (41%), **Figure A.1**.

Figure A.1: Business Type[1]

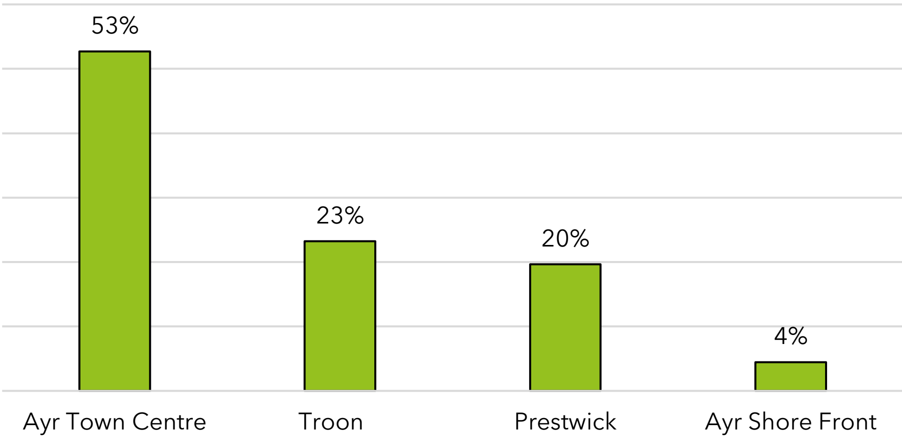


N=112

Most respondents were located in Ayr Town Centre (53%), with most of the remainder located in Troon (23%) and Prestwick (20%). Only 4% of respondents were located in the immediate environs of the event at Ayr Shorefront, **Figure A.2**.

[1] Services include hairdresser, nail bars, etc.

Figure A.2: Location



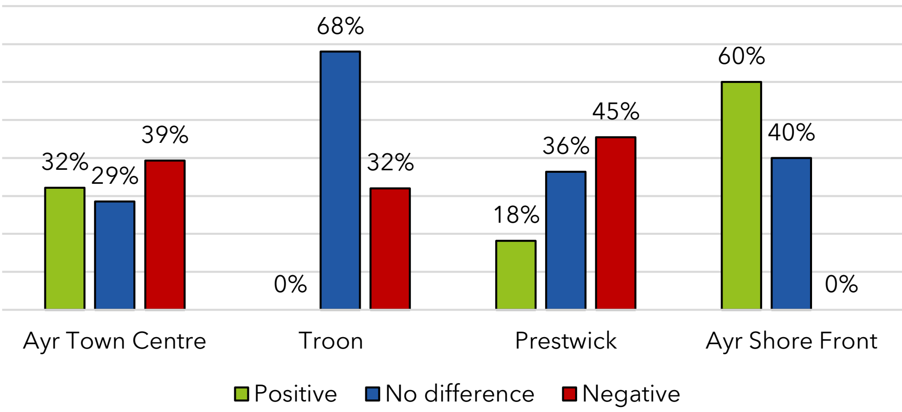
N=112

Change in Customer Traffic

23% of respondents reported a positive effect on their customer traffic. On the other hand, 37% reported a fall in traffic.

Figure A.3 outlines the changes in customer traffic by location. Troon is notable in that no businesses reported an increase in traffic, whilst only 18% of business in Prestwick reported an increase. Businesses in Ayr town centre were more positive.

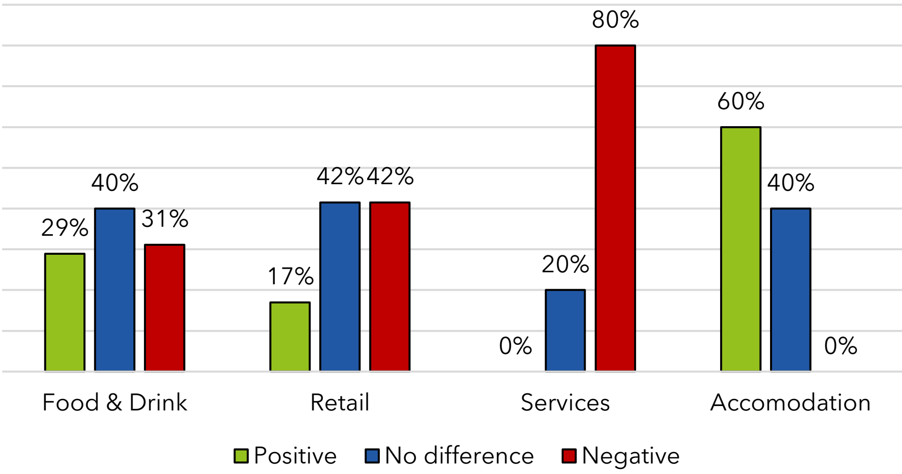
Figure A.3: Change in Customer Traffic by Location



Ayr Town Centre N=56, Troon N=25, Prestwick N=22, Ayr Shore Front N=5

Figure A.4 looks at change in customer traffic by business type. For both Retail and Food & Drink, more respondents reported lower traffic, than higher traffic, however, this difference was much more pronounced for retail businesses. Services businesses generally saw a negative impacts, whilst accommodation providers generally saw a positive impact.

FigureA.4: Change in Customer Traffic by Business Type



Food & Drink N=45, Retail N=53, Services N=5, Accommodation N=5

Of those that reported a negative impact, the main reasons given were:

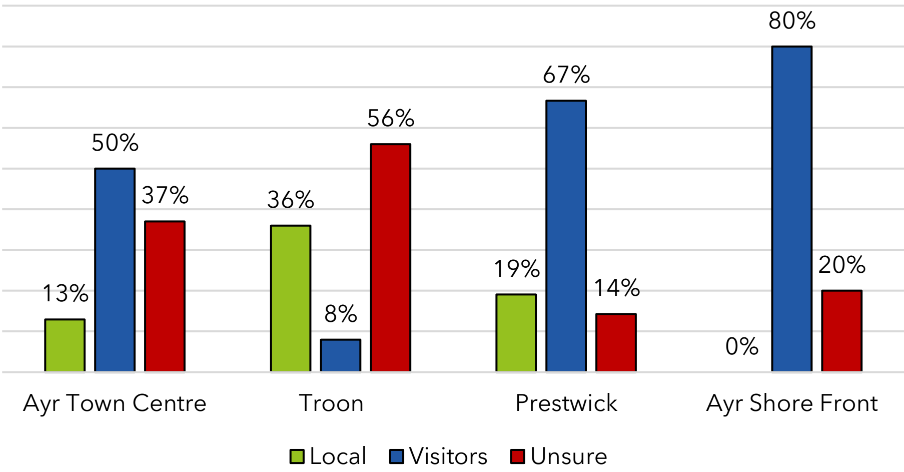
- Visitors generally did not spend time in their area.
- Regular locals were put off because of the high levels of traffic.

Local and Visitors

45% of respondents reported that the most of their customers during the event were visitors, compared to 19% who reported mainly locals, whilst 36% were unsure.

Businesses located in Ayr Town Centre, Prestwick and on the Ayr Shorefront reported that customers were generally visitors to the area, whilst businesses in Troon reported it was mainly locals, **Figure A.5.**

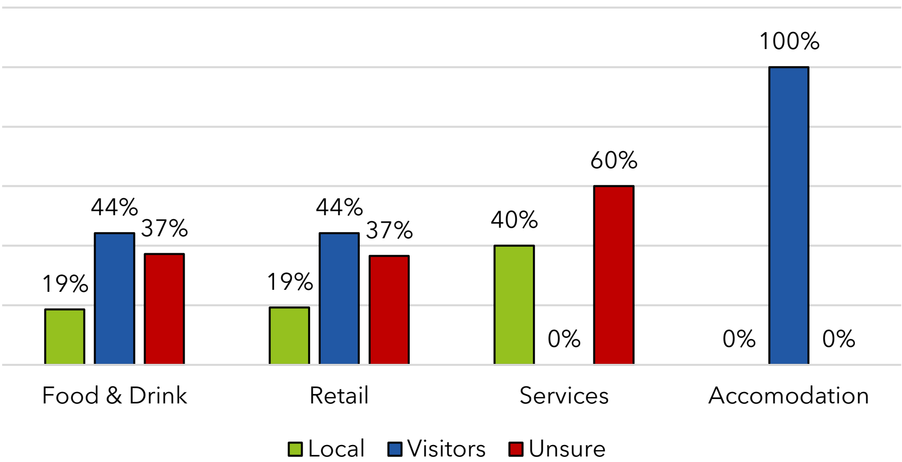
Figure A.5: Were most customers local residents or visitors? By Location



Ayr Town Centre N=54, Troon N=25, Prestwick N=21 Ayr Shore Front N=5

The local visitor/split for retail and food & drink businesses was broadly the same as the overall average. No services businesses reported more visitors, whilst all accommodation providers reported more visitors than locals, **Figure A.6**.

Figure A.6: Were most customers local residents or visitors? By Business Type



Food & Drink N=43, Retail N=52, Services N=5, Accommodation N=5

Event impact on revenue

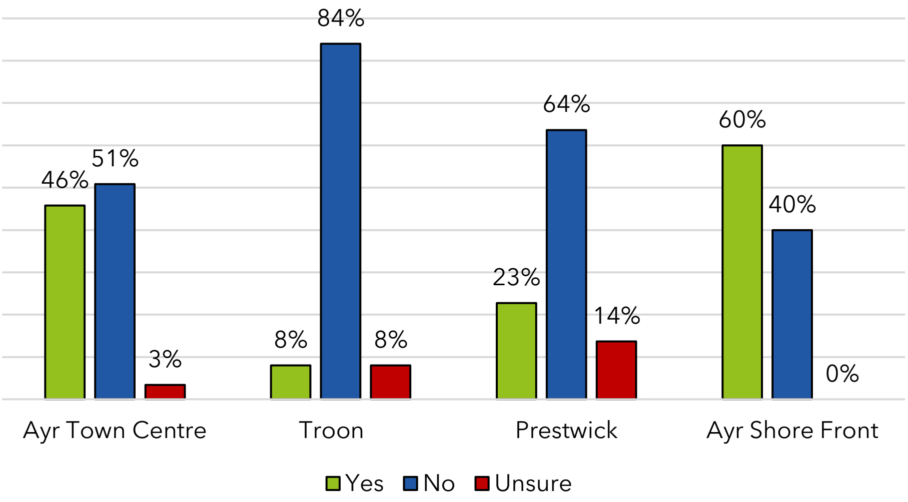
33% of respondent businesses saw an increase in revenue during the week of the event, compared to 60% who did not.

Those that did not see an increase in revenue gave reasons why they did not. The two most common reasons were:

- Visitors to the Ayr Show generally bypassed the town centre and spent their time at the beach front.
- The number of visitors increased the level of traffic which put off local regular customers.

In Troon and Prestwick, businesses generally did not see an increase in revenue during the week of the event. In Ayr, the number of businesses seeing an increase in revenue was far higher, **Figure A.7**.

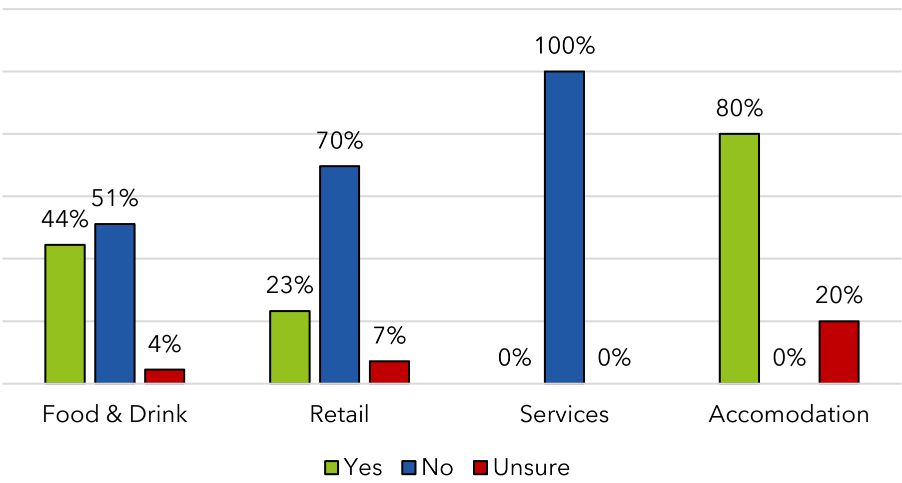
Figure A.7: Did your business experience an increase in revenue during the week of the event? By Location



Ayr Town Centre N=56, Troon N=25, Prestwick N=22, Ayr Shore Front N=5

Food & drink businesses (44%) were far likelier to see an increase in revenue than retail businesses (23%). No services businesses saw an increase in revenue, whilst most (80%) accommodation providers did, **Figure A.8**.

Figure A.8: Did your business experience an increase in revenue during the week of the event? By Business Type



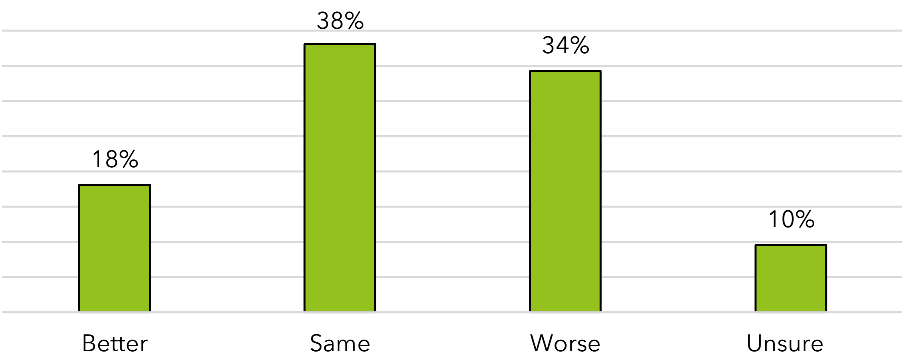
Food & Drink N=45, Retail N=56, Services N=5, Accommodation N=5

Comparison to Previous Year

19% of respondents believed that this year's event was better that the previous year's event, with 34% reporting that it was worse, **Figure A.9**.

The reasons given for this were broadly similar to those outlined earlier – visitors generally bypassed town centres, and locals were put off by the increase in traffic.

Figure A.9: How did 2024 compare to 2023?



N=105

Accommodating Demand

28% of businesses took on more staff, bought more stock or increased their opening hours due to the event. On the other hand, 23% cut their staff or cut their opening hours, **Figure A.10**.

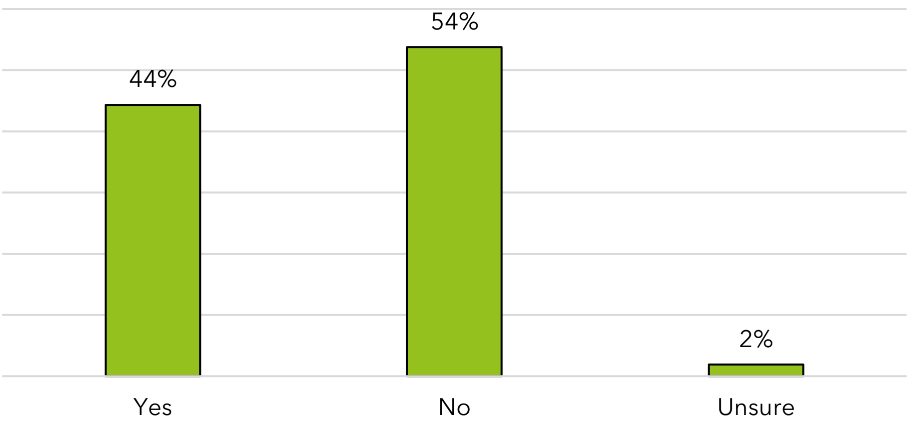
Figure A.10: Did you adjust your operations (e.g., extend hours, hire more staff) to accommodate demand?

N=111

Impact on Local Economy

44% of respondents believe that the event had a positive economic impact on their business and the local economy, **Figure A.11**.

Figure A.11: Do you believe this event positively impacts your business and the local economy?



N=106

Traders Survey

An online survey was also conducted with local traders who participated onsite at the event. There was a total of 15 responses.

Almost all respondents (92%) rated their experience of participating in the event as good or very good. One respondent felt it was average.

All respondents reported that the atmosphere at the event was either positive (31%) or very positive (69%).

The main thing that respondents enjoyed about the event were:

- The atmosphere was good.
- Lots of new customers.
- Enjoyed meeting other local traders.
- It was well organised.

The main challenges that traders faced were:

- A lack of signage to let people know what was in the marquee.
- There were some issues with access for traders due to not all parking attendants not having full knowledge of the access arrangements.

Just over half of traders were positive (15%) or very positive (38%) about the location and layout of the local traders' marquee. 46% were neither positive nor negative.

The main concerns were:

- A lack of signage.
- Only one side of the marquee was open on the Friday, limiting accessing. However, this was resolved on the Saturday.

The vast majority (85%) of traders felt that there was enough variation across the type of traders who participated in the event.

Most (77%) reported that footfall was higher compared to other events, however, more respondents felt that the income they received was less than they expected (54%) than those who felt it was more than expected (46%).

Finally, all but one respondent would be interested in participating in the Ayr Show in future, and all would recommend the event to other traders.

Appendix B: EIA Technical Details

This appendix set out the technical details of the EIA that has been conducted for the International Ayr Show 2024.

Our approach is in keeping with the principles for economic impact assessment as set out in the eventIMPACTS website.

Geographic Area of Study

Impacts are calculated at the South Ayrshire level.

Routes to Impact

It is important to note the mechanisms through which each event generates impacts, known as the Routes to Impact. In this case, the Routes to Impact are largely derived from expenditure by visitors with data gathered from the visitor surveys, both at the event, and off-site expenditure in shops, restaurants, hotels, etc.

To gather visitor expenditure data, a face-to-face survey was undertaken onsite over the course of the event. This survey was undertaken by South Ayrshire Council with no involvement from EKOS.

Respondents were asked a number of questions to determine economic impact. These were:

- their place of residence.
- their individual spend during their trip to the event.

Visitor Spend

Table B.1 outlines the detailed spend of survey respondents by place of residence and type of spend.

Table B.1: International Ayr Show 2024 Detailed Spend by Place of Residence

	At the event	In the wider town	Out with the event, e.g. accommodation /eating out etc.t
South Ayrshire Resident	£9,930	£4,945	£585
Resident elsewhere in Scotland	£15,585	£6,050	£5,180
Resident elsewhere in UK	£390	£625	£900
Resident Overseas	£890	£920	£1,295
Total	£26,795	£12,540	£7,960

Total Visitor Numbers

Visitor numbers were estimated at 260,000 by the event organisers, with 220,000 attending on the Saturday and 40,000 attending on the Friday. We have assumed that visitors were asked about spend on the day of their visit and have therefore not made allowances for unique visitors.

Grossed Up Impacts

The expenditure impacts are grossed up to the total population based on the inverse of the proportion responding to the survey (e.g. a response rate of 5% generates a grossing up factor of 100%/5% = 20).

Therefore, with a total respondent population of 1,551 and a total number of unique attendees of 260,000, the impacts are grossed up by 168. Responses from different geographic areas are separately grossed up and summed.

Total gross spend/expenditure at the International Ayr Show, Festival of Flight 2024 is therefore estimated at **£7.9m** at the South Ayrshire level.

Net Impacts

The net impact is what is generated by the International Ayr Show 2024 event, adjusted for displacement, leakage, deadweight and multiplier effects.

Deadweight

Deadweight is a measure of the extent to which impacts would have happened anyway in the absence of this event. This was judged to be zero as nothing would have happened in the absence of this event.

Leakage

Leakage is expenditure that takes place outside the geographic area at which the economic impact is being assessed. This has been judged to be zero, as impact questions were specifically about spend that took place within South Ayrshire.

Displacement

Displacement is a measure of the extent to which the event has simply moved expenditure from one part of the economy to another.

Displacement is judged based upon two factors, which are:

- their place of residence.
- the importance of the event to the visit to South Ayrshire.

The place of residence is important, as for those residing within the geographical area of study, displacement is 100% in line with the eventIMPACTS methodology. So, for example, the spend of a resident of South Ayrshire would not be included at the South Ayrshire level or at higher level geographies. This is due to the assumption that their spend at the event would have taken place within that geographic area if they had not attended.

Their importance of their visit to South Ayrshire is important to determine how attributable attendee spend is to the event. If they had visited solely in order to attend the event then their spend would be fully attributable, if they had visited for other reasons, then spend would not be attributable or only partly attributable.

There was no question asked about the importance of the festival to attendees' decision to visit South Ayrshire. We have therefore used our professional judgement based upon our experience of similar events to estimate the levels of displacement.

Based on these responses we have assumed the levels of displacement as set out in **Table B.3**.

Table B.3: Displacement (%)

	Displacement at South Ayrshire Level
South Ayrshire Resident	100%
Resident elsewhere in Scotland	5%
Resident elsewhere in UK	10%
Resident Overseas	15%

Multipliers

Multipliers relate to the impact of additional economic impact that occurs as a result of spending through additional income, supplier purchases, and longer-term effects. Multipliers are applied to GVA and employment factors.

There are two main mechanisms through which multiplier effects are realised:

- income effect – the money received through the event is paid out in wages to workers which is subsequently spent in the local economy driving additional economic impact.
- supplier effect – money is spent in the local economy on suppliers for the event, driving additional economic impact.

Multipliers are taken from the Scottish Input/ Output tables for the relevant sectors and is outlined in **Table B.4**. Data is only available at the Scotland level; we have therefore adopted a conservative approach to estimating the potential multiplier effects 33% at the South Ayrshire level.

Table B.4: Multipliers

	Event Spend Multiplier
Sector	Average of Retail, Food & Beverage Services, Sport & Recreation
Scotland Multiplier	1.66
South Ayrshire Multiplier	1.22

Net Spend

Applying these additionality factors generates an estimated net overall spend/expenditure of £6.1m at the South Ayrshire level.

Net Organisational Spend

As well as the impacts generated through visitor spend, we must also consider the economic impacts generated through spending in the local economy on organising the event.

In line with eventIMPACTS methodology, this is considered as Net Organisational Spend which is calculated at total organisational spend minus total organisational income.

Net organisational spend is then added to net direct visitor spend to generate total net direct spend. Net organisational spend is then added to net direct spend to determine the overall economic impact.

In this case, the organisation of the International Ayr Show 2024 had a break-even level of spend and net organisational spend was therefore zero, and contributing no additional economic impacts.

GVA

We then convert the net spend figure above to GVA. GVA is a measure of economic activity and accounts for the overall value added to the economy by the event. On a basic level this is the sum of profits and wages generated.

Using the spending to GVA ratio of 48% outlined in the eventIMPACTS methodology, this equates to net additional GVA and net additional FTE jobs as outlined in **Table B.2**.

Table B.2: Net Additional Impacts

	Net Spend	Net GVA
South Ayrshire	£6.1m	£2.9m