Moray Town Centre Health Check 2016

Elgin Town Centre Health Check 2016

There have been various retail activities across Elgin Town Centre since 2014. Two national multiples, Brighthouse and Poundworld, took up relatively large units within the town centre. Other smaller independent new outlets have included Pencil Me In on Batchen Street, Doolittle Doggy Daycare on Lossie Wynd and Curious Minds Education Centre. In comparison to 2012 it was notable that there was an increase in Electronic Cigarette or "Vaping" outlets and also independent shops offering mobile/pc repairs and accessories. In contrast to this there was a decrease in pay-day/cash for gold outlets which had emerged in the 2014 Audit. Vacancies have been created with the closure of Junners toy shop, Sign of the Times, Partco, Café Ecosse and other units.

There has been movement between premises by a number of retailers and service providers. For example Dorothy Jacks moved from the High Street into the former New Look in the St Giles Centre, Cotton Loom moved from Batchen to Commerce Street, Esquire moved further west up the High Street, Crafted Moray moved from the High Street into a unit on South Street formerly occupied by Sound and Vision and the Citizen Advice Bureau moved from Batchen to Moss Street. Whilst in some cases this movement between units has resulted in vacancies, the movement within the town centre suggests continued confidence in the location by existing retailers.

Diversity of Uses and Vacancies

Type of Use	Number of Units (2016)	Comparison to 2014	Floorspace (sqm)	Comparison to 2014
Comparison	86	No change	23765.5	Down 99.5 m ²
Convenience	18	No change	15682.5	Up 112.3 m ²
Retail Service	47	Up 2 units	4598.3	Down 490 m ²
Leisure Service	65	Down 2 units	15867.6	Down 415 m ²
Financial & Business Service	39	Down 9 units	8357.4	Down 490.1 m ²
Health & Medical	11	Up 2 units	Data not recorded	
Public Service	21	Up 2 units	Data not recorded	
Religious Service	5	No change	Data not recorded	
General Office Use	28	Up 1 unit	Data not recorded	
VACANCY	36	Down 3 units	7991	Up 471 m ²
VACANCY %	14.29%	Down 1%	11.77%	Up 0.76%

The Space in Use Survey was undertaken on the 19 July 2016.

Vacant Frontage

Vacant frontage is measured (scaling off OS base plans) in the core retail areas of the central High Street, South Street, Commerce Street and Batchen Street.

	Vacant Retail Frontage in Core Retail areas	% of Frontage that is vacant
2016	174m	13.44%
Comparison to 2014	Up 3m	Up 0.2 %

Retailer Representation

National multiples (such as Marks and Spencer, Poundland, WH Smith etc.) within the Comparison, Convenience and Retail Service category are counted.

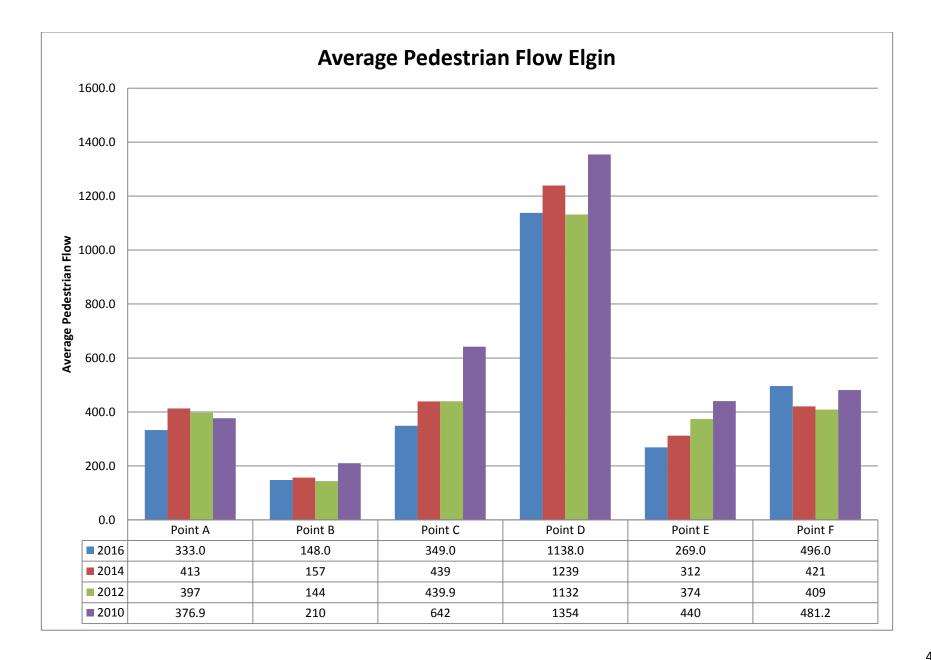
	Number of Units	% of Comparison, Convenience and Retail Service units
National Multiples (Comparison, Convenience and Retail Service)	52	34.%
Comparison to 2014	1 up	No change

Pedestrian Counts

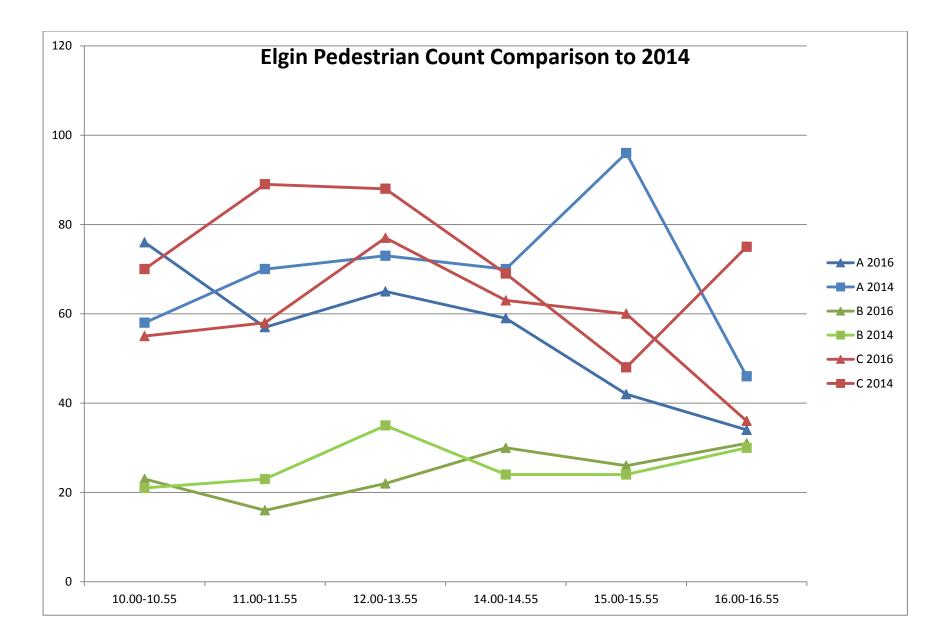
Pedestrian counts were undertaken on Thursday 23 June 2016. The weather was dry with sunny spells which is comparable to the conditions in 2014. It is notable that the count took place on the day of the EU Referendum and some schools may therefore have been off. Also previous years pedestrian counts were undertaken in September. These differences may account for some of the differences highlighted.

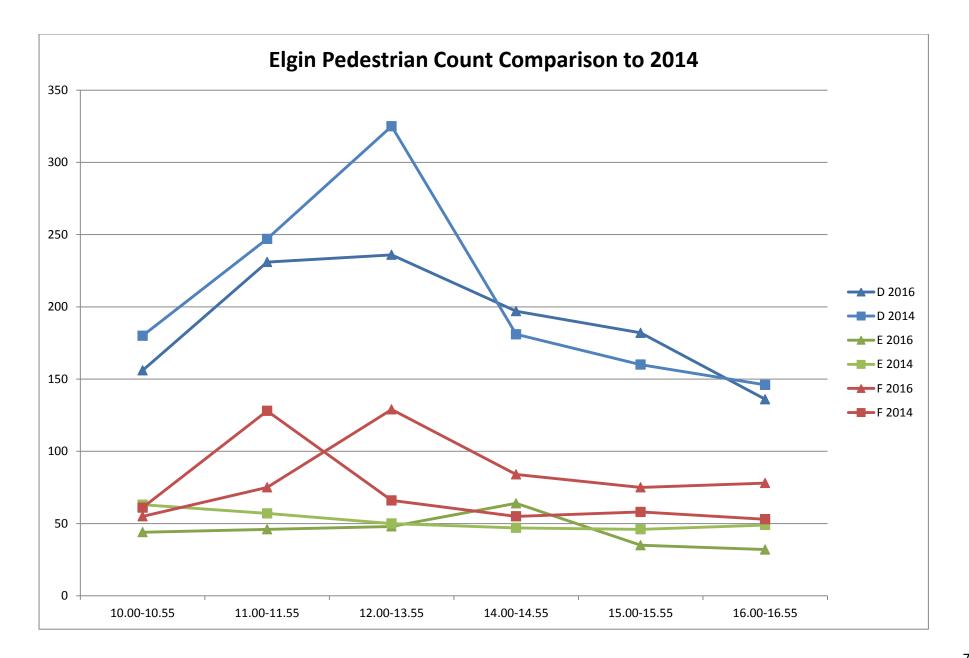
Count Point and Location	Point A	Point B Point C I		Point D Point E		Point F	
	A96 Underpass	High Street West end	Thunderton Place	High Street	South Street	High Street East end	
Hourly average pedestrian flow	333	148	349	1138	269	496	

Comparison to 2014 Down 80	Down 9	Down 90	Down 101	Down 43	Up 75



	Enumeratio	10.00- 10.55	Compariso n to 2014	11.00- 11.55	Compariso n to 2014	12.00	Compariso n to 2014	14.00- 14.55	Compariso n to 2014	15.00	Compariso n to 2014	16.00	Compariso n to 2014
	n Point					13.55				15.55		16.55	
	A96		Up 18		Down 13		Down 8		Down 11		Down 54		Down 12
Α	Underpass	76		57		65		59		42		34	
			Up 2		Down 7		Down 13		Up 6		Up 2		Up 1
	West end of												
В	High Street	23		16		22		30		26		31	
			Down 15		Down 31		Down 11		Down 6		Up 12		Down 39
	Thunderton												
С	Place	55		58		77		63		60		36	
			Down 24		Down 16		Down 89		Up 16		Up 22		Down 10
D	High Street	156		231		236		197		182		136	
			Down 19		Down 11		Down 2		Up 17		Down 11		Down 17
Е	South Street	44		46		48		64		35		32	
	East end of		Down 6		Down 53		Up 63		Up 29		Up 17		Up 25
F	High Street	55		75		129		84		75		78	
	Total	409	Down 44	483	Down 131	577	Down 60	497	Up 51	420	Down 12	347	Down 52
	% of Total	14.96	No change	17.67	Down	21.11	No change	18.18	Up	15.37	Up	12.69	Down
	flow	%		%		%	Ū	%		%		%	





Edgar Road Elgin

New occupiers since the 2014 audit include B&M in the former Homebase unit, and Anytime Fitness has occupied Unit 4 at Elgin Retail Park. Screwfix has occupied part of the former Magnet unit and the remaining part continues to be vacant. Edmundson Electrical is now occupied by Ceiling to Floor.

Diversity of Uses and Vacancies

The Space in Use Survey was undertaken on the 10 August 2016.

Type of Use	Number of Units (2016)	Comparison to 2014	Floorspace (sqm)	Comparison to 2014
Comparison	20	Up 1 unit	21382.15	Up 663.65 m ²
Convenience	2	No change	12386.8	No change
Retail Service	2	Down 1 unit	547.2	Down 78.8 m ²
Leisure Service	3	Up 1 unit	972.86	Up 516.36 m ²
Financial & Business Service	3	Down 1 unit	1232.5	Down 521 m ²
Health & Medical	1	No change	Data not recorded	
Public Service	1	No change	Data not recorded	
Religious Service	0		Data not recorded	
General Office Use	0		Data not recorded	
VACANCY	5	No change	3260.35	Down 255.86 m ²
VACANCY %	15.63%	Down 0.5%	8.46%	Down 0.87%

Note: VACANCY figures are for units where the last former use was Comparison, Convenience, Retail Service or Leisure Service. Vacant Banks are therefore not included in vacancy figures. **FLOORSPACE** there is no floorspace data for Hotels and Public House premises.

Retailer Representation

National multiples (such as Boots, B&Q, Matalan, Currys etc.) within the Comparison, Convenience and Retail Service category are counted.

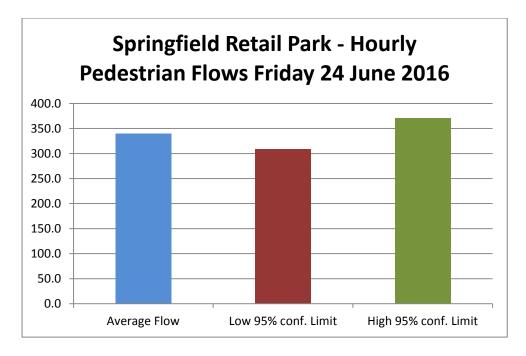
	Number of Units	% of Comparison, Convenience and Retail Service units
National Multiples (Comparison, Convenience and Retail Service)	18	75%
Comparison to 2014	Down 1	Down 4 %

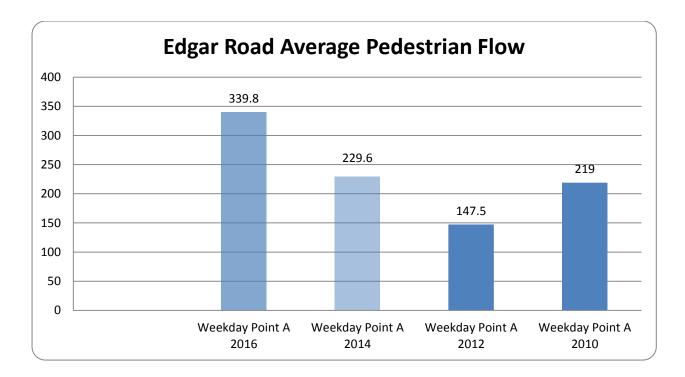
Pedestrian Counts

Pedestrian counts were undertaken on Friday 24 June 2016. The weather was dry and bright, which is comparable to 2014. Previous years pedestrian counts were undertaken in September. This may account for some of the differences highlighted.

Count Point and Location	Point A
	Between Next and Costa
Hourly average pedestrian flow	339.8
Comparison to 2014	Up 110.2

The first column shows the average of the data collected. The 95% confidence figures show the lower and upper levels of the range of figures that we can be 95% certain contains the "true mean" i.e. the true mean could be higher or lower than the standard average due to the limitations of the study.





Forres Town Centre Health Check 2016

The main changes across the High Street appear to have been within restaurant/takeaways with these changing hands rather than becoming vacant. Home Comforts now occupies the former FUSED store and a Turkish Barber now occupies the former Blythswood shop. A photographer is now occupying 132 High Street which had been vacant in 2014. There have been several new vacancies including the Hydro Electric shop, Oh How Sweet and Sweet Explosion. The former TESCO store on Gordon Street is no longer counted as it has been demolished since the 2014 survey. This has significantly reduced the vacant floorspace in comparison to 2014.

Diversity of Uses and Vacancies

The Space in Use Survey was undertaken on the 29 June 2016.

Type of Use	Number of Units (2016)	Comparison to 2014	Floorspace (sqm)	Comparison to 2014
Comparison	29	Down 3 units	4714.8	Down 209.2 m ²
Convenience	13	Down 2 units	2268.9	Down 91.3 m ²
Retail Service	21	Up 1 units	2489.6	Up 73.8 m ²
Leisure Service	25	Up 2 units	1292.3	No change
Financial & Business Service	20	Down 1 unit	4491.1	Up 220 m ²
Health & Medical	4	Down 1 unit	No data recorded	
Public Service	12	No change	No data recorded	
Religious Service	3	No change	No data recorded	
General Office Use	8	Up 3 units	No data recorded	
VACANCY	9	Up 1 unit	834.7	Down 1713.6 m ²
VACANCY %	9.28%	Up 1.12%	7.2%	Down 11.62%

Vacant Frontage

Vacant frontage is measured (scaling off OS base plans) in the core retail areas of the central High Street and Tolbooth Street.

	Vacant Retail Frontage in Core Retail areas	% of Frontage that is vacant
2016	37.51m	5%
Comparison to 2014	Up 18.51m	Up 2.5 %

Retailer Representation

National multiples (such as Boots, McColls, Co-op etc.) within the Comparison, Convenience and Retail Service category are counted.

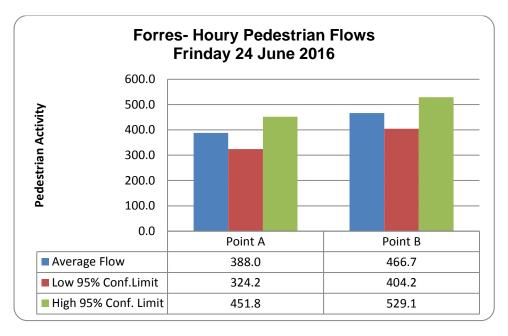
	Number of Units	% of Comparison, Convenience and Retail Service units
National Multiples (Comparison, Convenience and Retail Service)	13	20.63%
Comparison to 2014	Down 1	No change

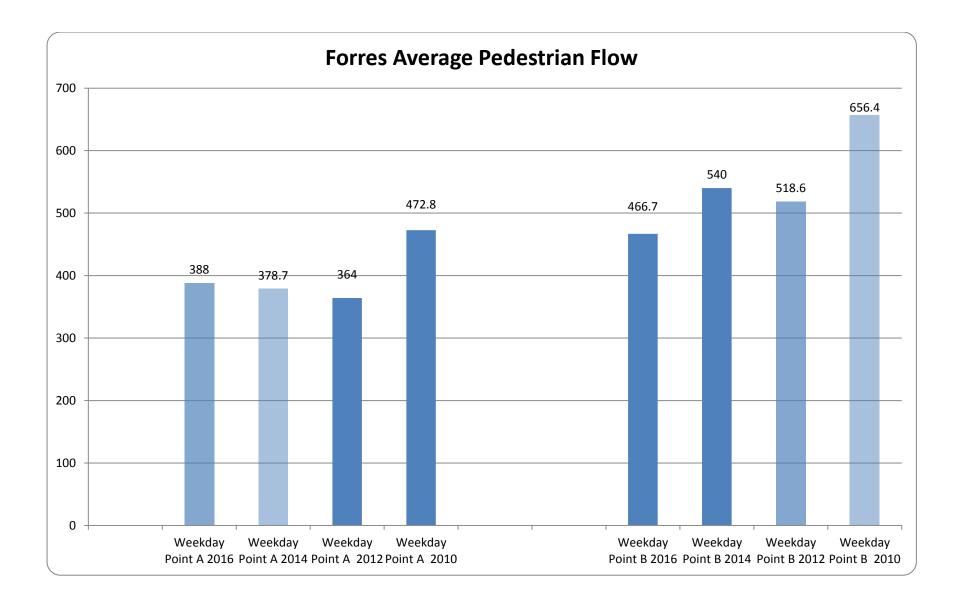
Pedestrian Counts

Pedestrian counts were undertaken on Friday 24 June 2016. The weather was overcast with some rain towards the end of the survey this is different conditions to 2014 when it was sunny. Previous years pedestrian counts were undertaken in September. These differences may account for some of the differences highlighted.

Count Point and Location	Point A	Point B
	42 High Street - Savers	90 High Street - Boots
Hourly average pedestrian flow	388	466.7
Comparison to 2014	Up 9.3	Down 73.3

The first column shows the average of the data collected. The 95% confidence figures show the lower and upper levels of the range of figures that we can be 95% certain contains the "true mean" " i.e. the true mean could be higher or lower than the standard average due to the limitations of the study.





	Enumeration Point	14.00-14.55	Comparison to 2014	15.00-15.55	Comparison to 2014	16.00-16.55	Comparison to 2014
А	High Street- opposite Savers	86	Down 11	113	Down 6	92	Up 24
В	High Street- opposite Boots Chemist	113	Down 14	129	Down 35	108	Down 6
	Total	199	Down 25	242	Down 41	200	Up 18
	% of Total Flow	31%	Down 1.5%	37.8%	Down 3.3%	31.2%	Up 4.8%

Keith Town Centre Health Check 2016

Several new retail units have opened since 2014; these include Be So Crafty, Lotus Petal and MAC Hair. In addition to this there has been work completed to the Greigs building and another shop unit gaining consent for conversion to residential. This work has helped to improve the appearance of the town centre. The Pop Up shop continues to be active. Strathisla Bakery has moved to a new unit and the former bakery unit remains vacant. Other new vacancies include the former gallery on Reidhaven Square and a unit formerly occupied by Taylors. The Royal Bank of Scotland has also closed.

Diversity of Uses and Vacancies

The Space in Use Survey was undertaken on the 6 July 2016.

Type of Use	Number of Units (2016)	Comparison to 2014	Floorspace (sqm)	Comparison to 2014
Comparison	27	Down 1 unit	5488.3	Down 323 m ²
Convenience	13	No change	1422.7	Up 12.3 m ²
Retail Service	12	Up 3 units	960	Up 192.2 m ²
Leisure Service	18	Down 1 unit	997.7	Down 80.9 m ²
Financial & Business Service	12	Down 2 units	1391.8	Down 225.7 m ²
Health & Medical	1	No change	No data recorded	
Public Service	1	Down 1 unit	No data recorded	
Religious Service	1	No change	No data recorded	
General Office Use	5	No change	No data recorded	
VACANCY	5	Down 1 unit	641.9	Down 17.7 m ²
VACANCY %	6.67%	Down 1.33%	6.75%	No change

Note: VACANCY figures are for units where the last former use was Comparison, Convenience, Retail Service or Leisure Service. Vacant Banks are therefore not included in vacancy figures. **FLOORSPACE** there is no floorspace data for Hotels and Public House premises.

Vacant Frontage

Vacant frontage is measured (scaling off OS base plans) in the core retail area of Mid Street.

	Vacant Retail Frontage in Core Retail areas	% of Frontage that is vacant
2016	45.33m	4.6%
Comparison to 2014	Down 36.67m	Down 3.8 %

Retailer Representation

National multiples (such as Spar, Post Office etc.) within the Comparison, Convenience and Retail Service category are counted.

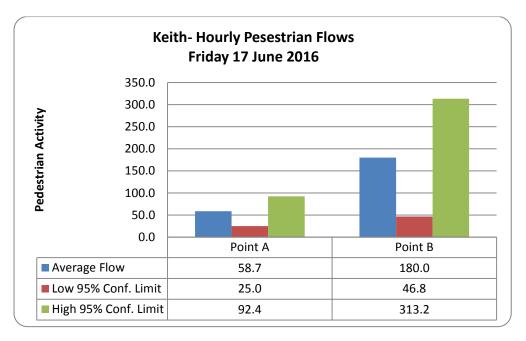
	Number of Units	% of Comparison, Convenience and Retail Service units
National Multiples (Comparison, Convenience and Retail Service)	5	9.6%
Comparison to 2014	Down 1	Down 2.4%

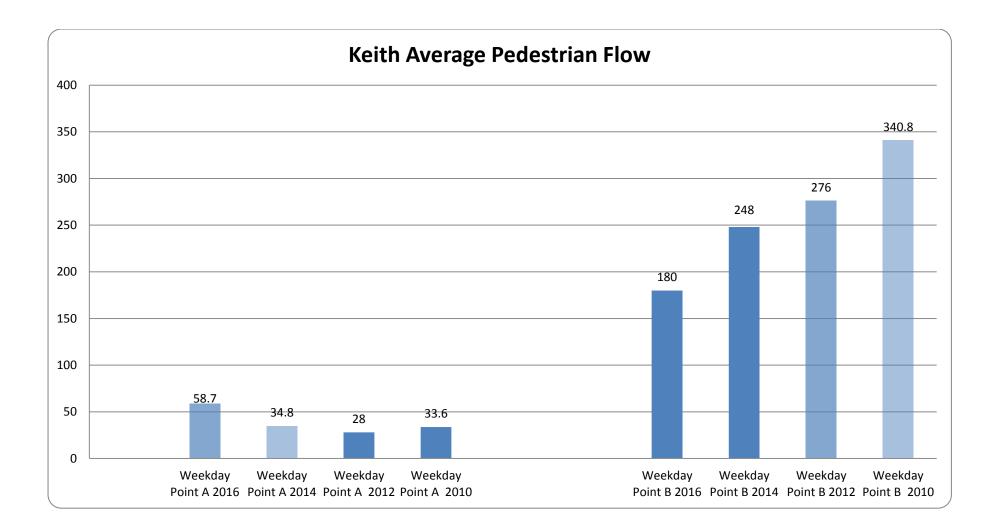
Pedestrian Counts

Pedestrian counts were undertaken on Friday 17June 2016. The weather was wet and cold, which is comparable to the poor conditions in 2014. Previous years pedestrian counts were undertaken in September. This may account for some of the differences highlighted.

Count Point and Location	Point A	Point B
	140 Moss Street – Access to Tesco	130-132 Mid Street – Post Office
Hourly average pedestrian flow	58.7	180
Comparison to 2014	Up 23.9	Down 68

The first column shows the average of the data collected. The 95% confidence figures show the lower and upper levels of the range of figures that we can be 95% certain contains the "true mean" " i.e. the true mean could be higher or lower than the standard average due to the limitations of the study.





	Enumeration Point	14.00-14.55	Comparison to 2014	15.00-15.55	Comparison to 2014	16.00-16.55	Comparison to 2014
А	140 Moss Street – Access to Tesco	11	Up 4	19	Up 4	14	Up 10
В	130-132 Mid Street – Post Office	35	Down 10	78	Down 17	22	Down 24
	Total	46	Down 6	97	Down 13	36	Down 14
	% of Total Flow	25.7%	Up 1.2%	54.2%	Up 2.3%	20.1%	Down 3.5%

Buckie Town Centre Health Check 2016

Since 2014 there have been a number of changes to retail units in Buckie. New retailers such as the Pram Boutique, Amaryllis Gifts and Home and Buckie Home Hardware have opened. Too Cute and Motion Fitness have occupied previously vacant units and existing businesses have expanded into other formerly vacant units. The Scottish Hydro Electric shop has become vacant since the 2014 survey.

Diversity of Uses and Vacancies

The Space in Use Survey was undertaken on the 1 July 2016.

Type of Use	Number of Units (2016)	Comparison to 2014	Floorspace (sqm)	Comparison to 2014
Comparison	28	Up 1 unit	5669	Up 58.8 m²
Convenience	7	No change	2187.2	No change
Retail Service	15	No change	1498.1	Up 11.5 m²
Leisure Service	21	Up 2 units	2294.1	Up 239.9 m ²

Financial & Business Service	13	Down 2 units	2398.5	Down 214.5 m ²
Health & Medical	5	Up 2 units	No data recorded	
Public Service	5	No change	No data recorded	
Religious Service	4	No change	No data recorded	
General Office Use	2	Up 1 unit	No data recorded	
VACANCY	8	Down 3 units	610.9	Down 329.9 m ²
VACANCY %	10.13%	Down 3.79%	4.98%	Up 2.04 %

Vacant Frontage

Vacant frontage is measured (scaling off OS base plans) in the core retail areas of the East Church Street, West Church Street, Cluny Square, and High Street.

	Vacant Retail Frontage in Core Retail areas	% of Frontage that is vacant
2016	54.8 m	5.69%
Comparison to 2014	Down 16.2m	Down 1.71 %

Retailer Representation

National multiples (such as Superdrug, M&Co, Co-op, Lidl etc.) within the Comparison, Convenience and Retail Service category are counted.

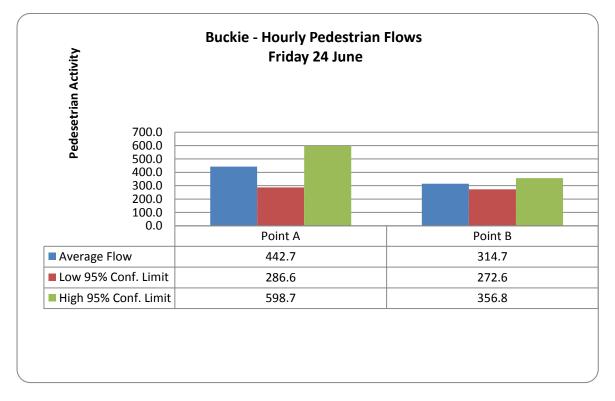
	Number of Units	% of Comparison, Convenience and Retail Service units
National Multiples (Comparison, Convenience and Retail Service)	14	28%
Comparison to 2014	Down 1	Down 2%

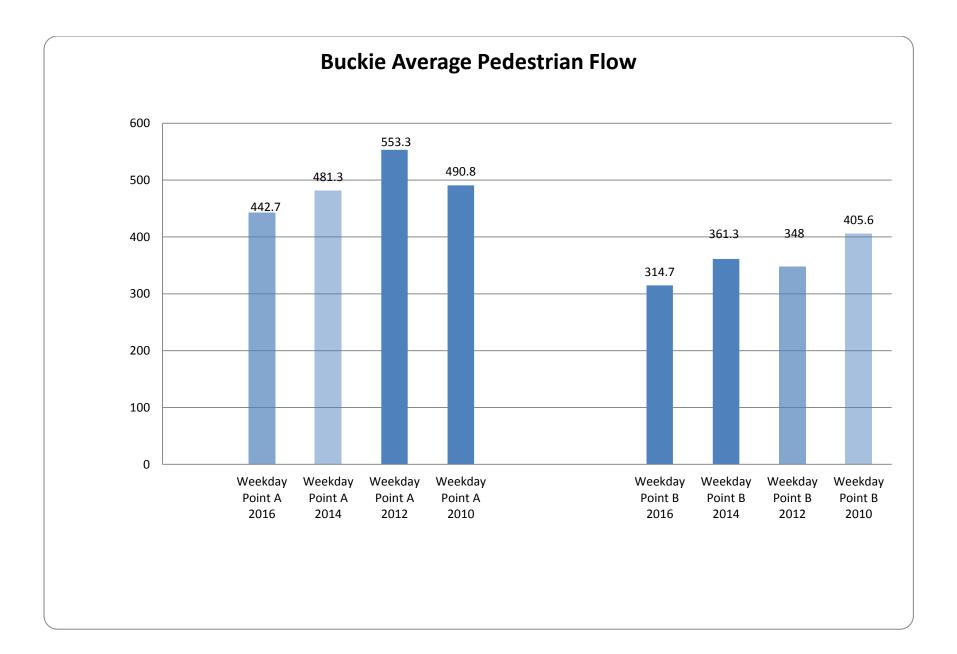
Pedestrian Counts

Pedestrian counts were undertaken on Friday 24 June 2016. The weather was wet and cold, which is comparable to the poor conditions in 2014. Previous years pedestrian counts were undertaken in September. This may account for some of the differences highlighted.

Count Point and Location	Point A	Point B
	3 High Street – Opposite Ashers Bakery	3-5 East Church Street
Hourly average pedestrian flow	442.7	314.7
Comparison to 2014	Down 38.6	Down 46.6

The first column shows the average of the data collected. The 95% confidence figures show the lower and upper levels of the range of figures that we can be 95% certain contains the "true mean" " i.e. the true mean could be higher or lower than the standard average due to the limitations of the study.





	Enumeration Point	10.00- 10.55	Comparison to 2014	11.00- 11.55	Comparison to 2014	12.00- 12.55	Comparison to 2014
А	3 High Street – Opposite Ashers Bakery	57	Down 80	155	Up 45	120	Up 6
В	3-5 East Church Street	80	Down 10	84	Up 9	72	Down 34
	Total	137	Down 90	239	Up 54	192	Down 28
	% of Total Flow	24.1%	Down 11.8 %	42.1%	Up 12.8%	33.8%	Down 1%

Lossiemouth Town Centre Health Check 2016

In Lossiemouth there have been several new occupiers including Deli-cious, Morscot Utilities, Smugglers Bar, and S Fear Kickboxing. Since 2014 there have been a number of units closed which remain vacant these include Royal Bank of Scotland, Post Office, Campbell Bakers, Pandora's Box and Holistic Health.

Diversity of Uses and Vacancies

The Space in Use Survey was undertaken on the 13 July 2016.

Type of Use	Number of Units (2016)	Comparison to 2014	Floorspace (sqm)	Comparison to 2014
Comparison	10	Down 2 units	2637	Up 75.5 m²
Convenience	6	No change	576	Up 33.9 m ²
Retail Service	9	Down 1 unit	409.5	Down 251.7 m ²
Leisure Service	18	Up 2 units	1995.3	Up 416.7m ²
Financial & Business Service	5	No change	931.1	Down 237.7 m ²

VACANCY %	15.69%	Up 0.31%	8.77%	Down 2.78%
VACANCY	8	No change	540.6	Down 157.3 m ²
General Office Use	1	Up 1 unit	No data recorded	
Religious Service	2	Up 1 unit	No data recorded	
Public Service	4	Up 1 unit	No data recorded	
Health & Medical	2	Up 1 unit	No data recorded	

Vacant Frontage

Vacant frontage is measured by scaling off OS base plans.

	Vacant Retail Frontage in Core Retail areas
2016	61.59m
Comparison to 2014	Down 32.41 m

Retailer Representation

National multiples (such as Lloyds Pharmacy, Co-op etc.) within the Comparison, Convenience and Retail Service category are counted.

	Number of Units	% of Comparison, Convenience and Retail Service units
National Multiples (Comparison, Convenience and Retail Service)	2	8%
Comparison to 2014	No change	No change

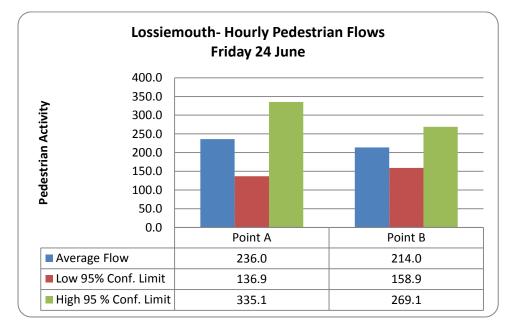
Pedestrian Counts

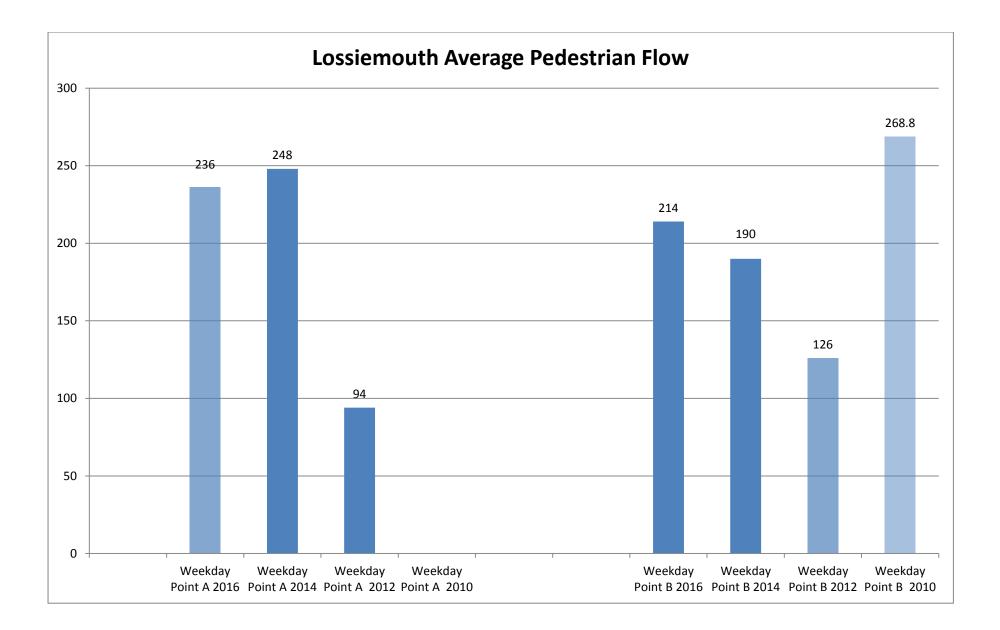
Pedestrian counts were undertaken on Friday 24 June 2016. The weather was fair and sunny, which is comparable to 2014. Previous years pedestrian counts were undertaken in September. This may account for some of the differences highlighted.

Count Point and Location	Point A	Point B
--------------------------	---------	---------

	80 Queen Street Opposite Co-op	15 Clifton Road Rizza's Ices
Hourly average pedestrian flow	236	214
Comparison to 2014	Down 12	Up 24

The first column shows the average of the data collected. The 95% confidence figures show the lower and upper levels of the range of figures that we can be 95% certain contains the "true mean". " i.e. the true mean could be higher or lower than the standard average due to the limitations of the study.





	Enumeration Point	10.00-10.55	Comparison to 2014	11.00-11.55	Comparison to 2014	12.00-12.55	Comparison to 2014
A	80 Queen Street Opposite Co-op	23	Down 16	45	Down 5	50	Up 15
В	15 Clifton Road Rizza's Ices	43	Up 4	35	Up 5	29	Up 3
	Total	66	Down 12	80	No change	79	Up 18
	% of Total Flow	29.3%	Down 6.3 %	35.6%	Down 0.9%	35.1%	Up 7.2%

Smaller Settlements

Aberlour

The Space in Use Survey was undertaken on the 14 July 2016.

Type of Use	Number of Units (2016)	Comparison to 2014	Floorspace (sqm)	Comparison to 2014
Comparison	7	Down 1 unit	510.9	Down 32.2 m ²
Convenience	5	Up 1 unit	806.3	Up 158.9 m ²
Retail Service	4	No change	1661.6	Down 126.7 m ²
Leisure Service	9	No change	572.9	No change
Financial & Business Service	2	No change	233.4	No change
Health & Medical	2	No change	No data recorded	
Public Service	3	No change	No data recorded	
Religious Service	1	No change	No data recorded	

General Office Use	1	No change	No data recorded	
VACANCY	0	No change	0	No change
VACANCY %	0%	No change	0%	No change

Dufftown

The Space in Use Survey was undertaken on the 14 July 2016.

Type of Use	Number of Units (2016)	Comparison to 2014	Floorspace (sqm)	Comparison to 2014
Comparison	10	No change	356.8	No change
Convenience	6	Down 1 unit	825.8	Down 86.4 m ²
Retail Service	4	Down 1 unit	82.3	Down 54 m ²
Leisure Service	18	Down 2 units	1294.3	Down 393.4 m ²
Financial & Business Service	2	Down 1 unit	1328.2	Down 88.7 m ²
Health & Medical				
Public Service	3	No change	No data recorded	
Religious Service				
General Office Use				
VACANCY	4	Up 3 units	308.8	Up 249.6 m ²
VACANCY %	9.52%	Up 7.19%	10.77%	Up 8.89%

Note: VACANCY figures are for units where the last former use was Comparison, Convenience, Retail Service or Leisure Service. Vacant Banks are therefore not included in vacancy figures. **FLOORSPACE** there is no floorspace data for Hotels and Public House premises.

Fochabers

The Space in Use Survey was undertaken on the 1 July 2016.

Type of Use	Number of Units (2016)	Comparison to 2014	Floorspace (sqm)	Comparison to 2014
Comparison	7	Down 1 unit	693	Down 75.1 m ²
Convenience	4	Up 1 unit	631.1	No change
Retail Service	3	No change	125.7	No change

Leisure Service	9	No change	439.5	No change
Financial & Business Service	2	No change	312.2	No change
Health & Medical	2	No change	No data recorded	
Public Service	2	No change	No data recorded	
Religious Service	1	No change	No data recorded	
General Office Use	2	No change	No data recorded	
VACANCY	1	No change	70.3	No change
VACANCY %	4.17%	No change	3.59%	No change

Rothes

The Space in Use Survey was undertaken on the 14 July 2016.

Type of Use	Number of Units (2016)	Comparison to 2014	Floorspace (sqm)	Comparison to 2014
Comparison	7	Up 2 units	811.9	Up 317.1 m ²
Convenience	3	Down 1 unit	474.9	Down 276 m ²
Retail Service	2	No change	362.5	No change
Leisure Service	9	No change	153	No change
Financial & Business Service	4	No change	203.6	No change
Health & Medical	1	No change	No data recorded	
Public Service	4	No change	No data recorded	
Religious Service	1	No change	No data recorded	
General Office Use				
VACANCY	2	Down 1 unit	234.5	Down 41.1 m ²
VACANCY %	8.7%	Down 4.34%	11.51%	Down 2.02%

Note: VACANCY figures are for units where the last former use was Comparison, Convenience, Retail Service or Leisure Service. Vacant Banks are therefore not included in vacancy figures. **FLOORSPACE** there is no floorspace data for Hotels and Public House premises.