

# **Moray Town Centre Health Check Assessment 2012**

For further information, please contact:

Rowena MacDougall Tel: 01343 563265, email: [Rowena.macdougall@moray.gov.uk](mailto:Rowena.macdougall@moray.gov.uk)

## 1. Executive Summary

- 1.1 In 2012, Moray Council undertook a series of Town Centre Health Check assessments in Moray. These were in line with framework established in 2010 with Hargest Planning Ltd. Whilst the study undertaken in 2010 was wider including a retail model and household/shopper surveys the 2012 study focuses only on a number of the key Vitality and Viability indicators. This provides a baseline of information as part of the on-going programme of health check assessments.
- 1.2 Assessment was undertaken in the existing town centres of Elgin, Forres, Buckie, Keith and Lossiemouth. The Edgar Road area of Elgin is also assessed. Limited assessment was undertaken in Aberlour, Dufftown, Fochabers and Rothes.
- 1.3 The report does not seek to provide an interpretation of the information obtained- its role is to provide the base information for other studies/analysis to interpret.

### Elgin Town Centre

- 1.4 Comparison outlets continue to be the dominant town centre use. However the town centre has a broad mix of other shops including convenience, retail services and leisure services. There is a good mix of national multiples and independent stores providing variety in the town centre. Vacancy rates are higher than 2010 at 9.8% which is around the Scottish average of 10%. The core of the High Street (around the Plainstones) continues to have the highest footfall although the footfall recorded was down on 2010. This may partly be due to the adverse weather conditions during the count. Levels of footfall are generally good throughout the day but reduce after four o'clock. Limited information was available on rental levels and yields but there was suggestion that this has not changed significantly since 2010.

### Edgar Road

- 1.5 Comparison outlets continue to be the dominant use in the Edgar Road area in terms of number of units and floor space, however there is significant floor space given to convenience retailing. Within this area there is a high percentage (80%) of national multiples. The pedestrian flow recorded was lower than 2010. Vacancy rates are 30% so significantly higher than the national average of 10%.

### Forres

- 1.6 As with other towns comparison retailing is the dominant use in the town centre with significant levels of retail services, convenience and leisure services. 21% of retail units are national multiples and the independent shops give character to the town centre. Vacancy rates have increased from 2010 to 9.8% but continue to be lower than the Scottish average. Pedestrian footfall was lower than 2010 but was quite steady throughout the day.

### Keith

- 1.7 Comparison retailing is the dominant town centre use with convenience and retail services contributing to the mix. The number of national multiples is 13% of the retail uses. The vacancy rate has increased to 12.7% which is above the Scottish average of 10%. The footfall recorded on Saturday was higher than that in 2010 but lower on the Friday.

### Buckie

- 1.8 Comparison continues to the dominant retail use within the town centre, but there are also good levels of convenience floor space. There is also a good mix of retail services, financial and business services and leisure services. National multiples make up 21% of the retailing. The vacancy levels are only 4.82% which is comparable to 2010. Generally footfall was higher than 2010 with the exception of one point where footfall was 14% lower than 2010.

### Lossiemouth

- 1.9 No one use is particularly dominant in Lossiemouth with a fairly even mix between comparison, convenience, retail services and leisure services. Only 8% of retail is national multiples. The vacancy rate has decreased from 2010 but continues to be slightly above the Scottish average of 10.17%. The footfall recorded was lower than 2010.

### Smaller Settlements

- 1.10 The dominant use is Dufftown and Rothes was leisure services, whereas in Aberlour and Fochabers it was comparison. The level of national multiples was lowest in Aberlour being 11% and highest in Rothes at 30%. But caution should be used as there are relatively few shops which can skew the percentage. The vacancy rate was below the Scottish average for all the towns except Rothes where a vacancy rate of 14.3% was recorded.

## 2. Vitality & Viability Indicators

- 2.1 This analysis focuses on an assessment of the performance of the existing 'town centres' of Elgin (and also Edgar Road), Forres, Keith, Buckie and Lossiemouth. In addition, limited audits were carried out for Aberlour, Dufftown, Fochabers and Rothes. This report provides an assessment of existing 'town centre' uses in accordance with Scottish Planning Policy (SPP) criteria and the recommendations of the '*Town Centres Retailing and Methodologies*' paper published by the Scottish Government in December 2007.
- 2.2 SPP defines 'Vitality' as a measure of how lively and busy a town centre is. 'Viability' is defined as a measure of capacity to attract ongoing investment for maintenance, improvement and adaptation to changing needs. Together these measures give an indication of the health of a town centre and, when used consistently over a period of time as part of a town centre health check, can demonstrate changes in

performance that can inform future decision making. A brief description of key Vitality and Viability Indicators assessed in this report are provided below.

- 2.3 **Pedestrian flow** can be defined as the movement of people past a particular location over a specified period of time (e.g. average hourly counts). Data was collected at different times of day (peak/off peak) and on different days of the week in pre-selected locations. Plans of the footfall survey locations are provided in Appendix II.
- 2.4 **Diversity of Uses** surveys have been undertaken, which comprise an analysis of the mix of uses within the centres and the quantum of floor space they occupy. We have used floor space data from the Regional Assessor where available and conducted site surveys of each of the study areas, using GOAD Experian Ltd. categories and classifications; - a table showing GOAD categories is included in Appendix III.
- 2.5 **Retailer representation** is a recording and assessment of those retailers located within the town centre in terms of identity and type (e.g. multiple or independent retailers).
- 2.6 **Vacancy rates** can be defined as either the number of units or amount of vacant floor space not in occupation, expressed as a percentage of the total number of retail units or floor space in a centre. Vacancies are measured for vacant Comparison, Convenience, Retail Services and Leisure Services only. We have also provided a measurement of the length of retail frontage that is vacant in each centre. This is an indicator of the impact that vacancies have on the appearance and feel of a centre, since this is what most shoppers in the centre will be aware of.
- 2.7 **Accessibility** to and from a centre is a key factor in the attractiveness of a centre and is an important indicator underpinning town centre viability. Indicators should encompass most of the following: public and private transport modes, congestion issues, and provision for the disabled and cyclists.
- 2.8 **Environmental quality** is a key factor which contributes directly to the vitality of a centre and, indirectly, to town centre viability. SPP identifies town centre environmental quality as a specific issue covering both positive and negative aspects of the environment.
- 2.9 Information on **tourist** related activity was collected through indicators such as Diversity of Uses (for example identifying restaurants and key tourist facilities). Tourism and day-trippers can make an important contribution to the economy.
- 2.10 Information on **retail rents** and commercial **yields** was collected in 2010. However, despite sending out 16 questionnaires to retail agents in the area none were returned. Agents were therefore asked simply if they thought there had been any change to the figures reported in 2010 for Elgin had changed. One agent responded, and therefore this indicator is only reported for Elgin.
- 2.11 The 2010 Report looked at **Retailer intentions**; the intentions of existing retailers to relocate/occupy more or less space in a centre. This has not been completed for 2012 and will be undertaken on a five yearly basis.

- 2.12 **Crime, safety and perceptions** of are identified in SPP as indicators of vitality in a centre. This was reported in 2010 however the data sourced from Grampian Police relates to Beat Areas which do not correspond to the town centre areas and are much wider areas, sometimes including rural areas as well as urban areas. As this information does not give an indication of the crime and safety of town centres it will only be reported when consumer surveys are undertaken when perceptions of crime and safety can be captured.
- 2.13 **Consumer surveys** were undertaken in 2010, given the scale and cost of this exercise it is only likely to be undertaken on a five yearly basis. Similarly a study in respect of **turnover** was undertaken in 2010 but due to the scale and cost of this it is only likely to be repeated on a five yearly basis or when need arose.

### 3. Elgin Town Centre Health Check

#### Pedestrian Footfall

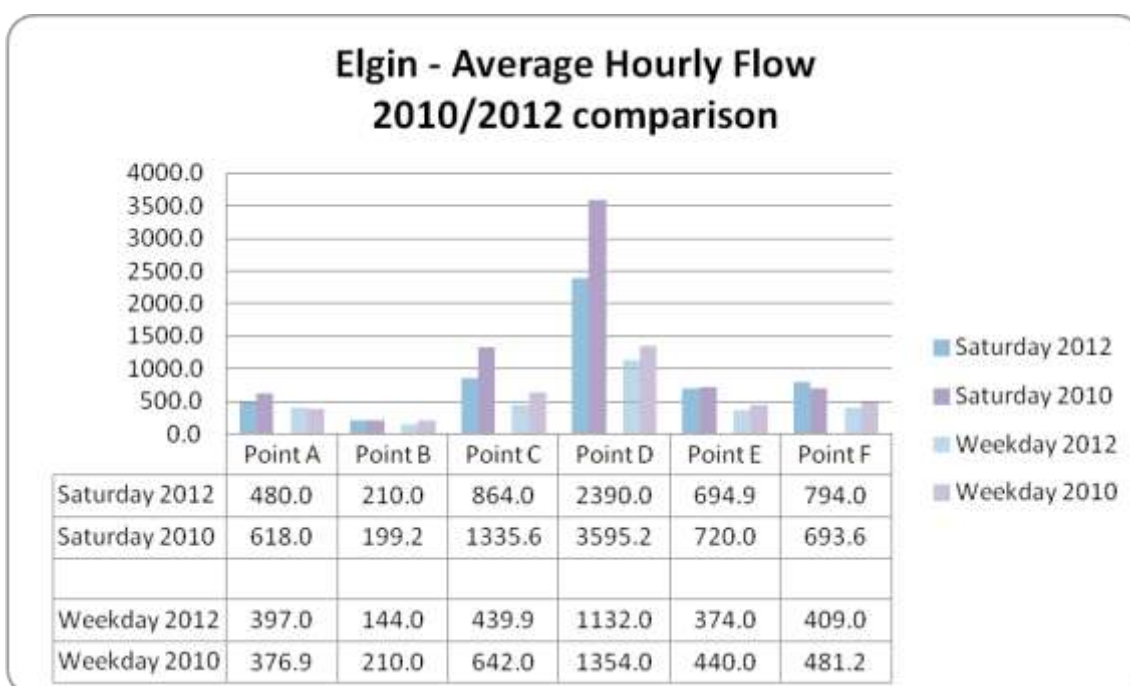
- 3.1 A pedestrian flow count was undertaken by Moray Council staff on Thursday 13<sup>th</sup> and Saturday 29<sup>th</sup> September 2012, between 10.00 and 17.00. Pedestrian footfall data was collected at 6 positions throughout the town centre. Full details of the survey locations are provided below. A plan of the footfall survey locations is provided in Appendix II.

*Table 1: Details of Elgin Town Centre Footfall Survey*

Enumeration Point	Location
A	A96 Underpass
B	West end of High Street (No. 239 High Street)
C	Thunderton Place (No. 5 Thunderton Place)
D	High Street (No. 139 High Street)
E	South Street (No. 58 South Street)
F	East end of High Street (No. 38 High Street)

- 3.2 Of the six locations, the position opposite Boots in the High Street (Point D) recorded the busiest footfall on both the Thursday and Saturday. It should be noted that during the Saturday survey the Farmers' Market was taking place on the Plainstones, which is comparable to 2010 when the market also took place on the Saturday. The lowest pedestrian flow count in the town centre was recorded at the western end of High Street (Point B) on both Thursday and Saturday.
- 3.3 Comparison to the footfall survey undertaken in 2010 shows that generally average hourly flows are lower, with higher flows only being recorded on Saturday at point B and point F. At point A on Thursday the average flow was also higher than 2010. The biggest differences between 2010 and 2012 were at point C and point D where flows were 35% and 33% lower respectively than those recorded on Saturday in 2010. It is notable that the weather during the 2012 count was cold and windy with some wet showers. The weather during the 2010 was not comparable being recorded as dry with only occasional showers. Chart 1 below illustrates the average flows for both 2010 and 2012 at each position on Saturday and Thursday.

Chart 1: Elgin Average Hourly Flow 2010/2012 comparison



- 3.4 Variation in pedestrian flows at different times of the day for the total enumeration period can be analysed. The Thursday count revealed that overall, 24.03% of the total flow occurs between 12.00 and 14.00<sup>1</sup>, whilst 14.76% occurs after 15.00. This figure falls further to 12.83% after 16.00 hours. Further details of the Time of Day Analysis are illustrated in *Table 2* below.

Table 2: Elgin Footfall- Time of Day Analysis- Thursday 13th September 2012

Enumeration Point		10.00-11.00	%	11.00-12.00	%	12.00-14.00	%	14.00-15.00	%	15.00-16.00	%	16.00-17.00	%
<b>A</b>	A96 Underpass	34	8.6	75	18.9	112	28.2	74	18.6	49	12.3	53	13.4
<b>B</b>	West end of High Street	13	9.0	30	20.8	30	20.8	26	18.1	18	12.5	27	18.8
<b>C</b>	Thunderton Place	28	6.4	89	20.4	117	26.8	74	17	61	14	67	15.4
<b>D</b>	High Street	141	12.4	201	17.8	285	25.2	207	18.3	159	14.0	139	12.3
<b>E</b>	South Street	57	15.2	58	15.5	64	17.1	85	22.7	67	17.9	43	11.5
<b>F</b>	East end of High Street	46	11.2	82	20.0	87	21.3	79	19.3	73	17.9	42	10.3
<b>Total</b>		<b>319</b>	<b>11.0</b>	<b>535</b>	<b>18.5</b>	<b>695</b>	<b>24.0</b>	<b>545</b>	<b>18.9</b>	<b>427</b>	<b>14.8</b>	<b>371</b>	<b>12.8</b>

<sup>1</sup> Counts were undertaken continuously between 10.00 and 17.00 hours with counting points being rotated at the same time in each hour (except for one hour between 12.25 and 13.25 when counters took a lunch break.

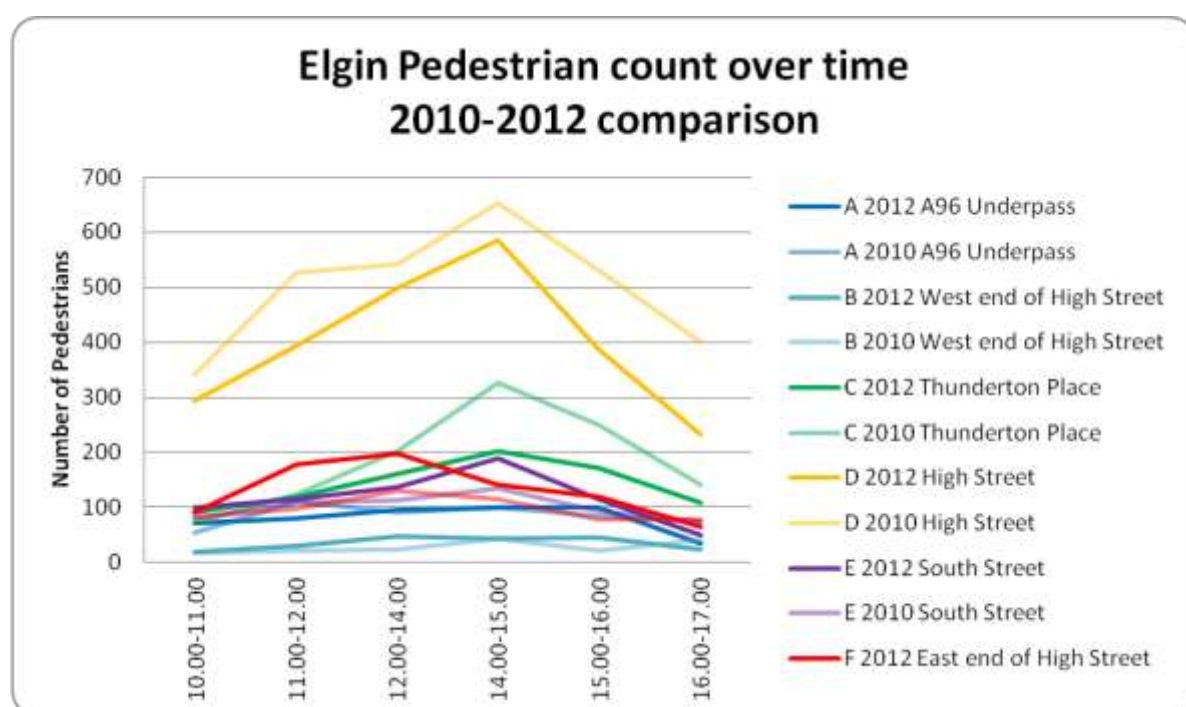
- 3.5 Analysis of the Saturday count revealed that overall 23% of the total flow occurs between 14.00 and 15.00. Similar to the Thursday count, footfall dropped to 9.4% during the period 16.00 to 17.00. Further details of the Time of Day Analysis recorded on Saturday 29<sup>th</sup> September are illustrated in *Table 3* below.

*Table 3: Elgin Footfall- Time of Day Analysis- Saturday 29th September 2012*

Enumeration Point	10.00-11.00	%	11.00-12.00	%	12.00-14.00	%	14.00-15.00	%	15.00-16.00	%	16.00-17.00	%
<b>A</b> A96 Underpass	71	14.8	79	16.5	96	20	99	20.6	100	20.8	35	7.3
<b>B</b> West end of High Street	19	9.1	31	14.8	48	22.9	44	20.9	45	21.4	23	10.9
<b>C</b> Thunderton Place	92	10.8	120	14.1	160	18.7	202	23.6	171	20	109	12.8
<b>D</b> High Street	293	12.2	394	16.5	499	20.9	585	24.5	387	16.2	232	9.7
<b>E</b> South Street	100	14.2	115	16.3	136	19.3	190	26.9	115	16.3	49	7
<b>F</b> East end of High Street	91	11.5	179	22.5	198	24.9	142	17.9	120	15.1	64	8.1
<b>Total</b>	666	<b>12.3</b>	989	<b>16.9</b>	1137	<b>20.9</b>	1262	<b>23.2</b>	938	<b>17.3</b>	512	<b>9.4</b>

- 3.6 Generally the variation in pedestrian flow at different times of the day has remained largely similar to that of 2010, with the peaks and drops largely occurring in the same pattern. The line graph in *Chart 2* illustrates this.

*Chart 2: Elgin Pedestrian count over time 2010-2012 comparison*



## Diversity of Uses

- 3.7 Surveys of the town centre indicate a wide range of different uses and types of property within the town centre. The centre has a wide range of retail and non-retail facilities and activities, including tourist attractions such as Elgin Museum.
- 3.8 *Table 4* below demonstrates that the dominant use within Elgin town centre is Comparison retailing (e.g. clothing; footwear; electrical good etc.). There is also a significant proportion of Retail Services within the town centre (e.g. hairdressers; beauticians; travel agents) and Leisure Services (e.g. hotels; pubs; restaurants; cinemas). There are a smaller proportion of Convenience shops (e.g. supermarkets; grocery stores etc.) but these include the Tesco superstore. Therefore, in terms of floor space, Convenience comprises a significant proportion of the town centre floor space. The town centre also includes a range of other local businesses predominantly in the Financial and Business Services sector such as solicitors, accountants and property agents. Also, in the town centre it should be noted that there are a significant number of dwellings including flats, especially on upper floors and in the peripheral parts of the town centre.
- 3.9 The overall mix of uses and the quantum of floor space they occupy is summarised in the table below.

*Table 4: Elgin- Diversity of Uses*

Summary of Elgin Diversity of Uses Survey				
Type of Use	July 2012		July 2010	
	No. of Outlets	Floor space (sqm)	No. Of Outlets	Floor space (sqm)
Comparison	94	27208.8	98	22296
Convenience	22	16008.5	24	17471
Retail Service	46	7157	44	4676
Leisure Service	67	15630.6*	70	16419*
Financial & Business Service	49	8923.5	46	6564
Health & Medical	9		9	
Public Service	19		6	
Religious Service	5		4	
General Office Use	25		45	
Vacancy	25	5203.6**	15	
Total	361	80,132	361	70,148



**Notes:**

**\*The Regional Assessor does not hold floor space data for Hotels and Public House premises**

**\*\* No floor space data for 130 High Street.**

- 3.10 This is the second year the survey of uses has been completed, and some premises appear not to have been picked up in the 2010 survey. There have also been some changes to the categorisation of certain uses to improve consistency between towns. These adjustments as the study progresses account for some of the differences between categories.

### **Retailer Representation**

- 3.11 There are a number of national multiple retailers located within Elgin, including Marks & Spencer, WH Smiths and M&Co. Site surveys revealed 50 national (Scottish/UK) multiples in the town centre out of a total of 162 comparison, convenience, and retail service outlets – that is 31%. In addition to the multiple retailers, the town centre has a good provision of independent/specialist retailers. South Street, Batchen Street and Commerce Street accommodate a collection of independent stores in small retail units providing a more bespoke range of services.
- 3.12 Within the defined town boundary there are a number of food stores, the largest of which are the 9,887.8 sq m (net) Tesco on Blackfriars Road, the 1,559 sq m Marks & Spencer's store on High Street and the 1,509 sqm Aldi store. Both Tesco and M&S have a substantial portion of floor space for Comparison goods as well as convenience. In *Table 4* above, this has all been classed as 'Convenience' floor space.
- 3.13 9 (5.5%) units in the town centre were identified to be charity shops. This is lower than the 10 units recorded in 2010 and can be compared to both 8.6% in Forres and 5% in Buckie
- 3.14 One of the biggest changes since the 2010 study has been the increase in pawnbrokers, "buy, sell and loan stores" and gold buying outlets. Five outlets of this type were recorded during the survey, and increase from only 1 outlet (Ramsdens) in 2010.

### **Vacancy Rate**

- 3.15 A site survey by Moray Council planning staff during July 2012, confirmed the number of vacant units stood at 25<sup>2</sup>, as illustrated above in *Table \**. Vacancies account for 9.8% of the total number of Comparison, Convenience, Retail and Leisure Service units within the centre. This is slightly below the Scottish average of

---

<sup>2</sup> It should be noted that vacancies are measured for vacant Comparison; Convenience; Retail Service; and Leisure Service outlets only and is based on their last use.

10%. However, this is an increase of 10 units compared to 2010 when the percentage of vacancies was around 6%.

- 3.16 Since completion of the survey in July 2012 there have been some closures of national retailers such as Birthdays, Clintons and Julian Graves. Given these retailers closed as a result of the national economic climate this is not considered to be a reflection of the health of Elgin town centre. Indeed since completion of the survey new retailers have opened such as Elgin Gallery and Coffee Shop, Top 2 Toe and Pink hairdressers.
- 3.17 Floor space data obtained from the Regional Assessor indicates that there is approximately 5,203.6 sq m of vacant floor space with Elgin town centre. There is approximately 133 m of vacant retail frontage in the town centre (figure obtained by scaling off OS-base plans). This figure equate to approximately 9.2% of the retail frontage of the traditional shopping streets in the town centre- (e.g. the core retail area of High Street; Commerce Street; Batchen Street; South Street and Thunderton Place). This is an increase from 6.7% found in 2010.

#### Rent and Yield

- 3.18 Despite issuing questionnaires to 16 agents actively letting retail units within Moray town centres no responses were received other than to advise no involvement in transactions. The agents were therefore contacted to ask simply if they considered there to be any change to the figures reported in 2010 for Elgin. One agent responded confirming they did not consider there to be any change. In 2010 prime zone A rentals were reported as £37 per sq ft for Elgin High Street and £35 per sq ft in other retail locations in Elgin town centre. Yields for Elgin High Street were reported as ranging from 8.5% to 10%, and in more periphery parts of the town centre were estimated to range from 10% to 15%.

#### Accessibility

- 3.19 The east/west alignment of the A96 is paralleled by the Aberdeen to Inverness rail line which serves Elgin. The northern inner relief road has created severance between the town centre core and key neighbourhoods and landscape amenity spaces. The eastern and western approaches to the town centre and the gateways at either end fail to offer an appealing or appropriate quality of introduction to the town centre. The disconnection between the town centre and the railway station located on Station Road is also an issue.
- 3.20 Elgin bus station is located on Alexandra Road, adjacent to the St. Giles Centre. As Moray is a predominantly low density, rural area, bus services are often not commercially viable. Innovative solutions such as community bus services and dial-a-bus services have been developed at a lower cost than standard bus services to meet the transport needs of the population (*Local Transport Strategy*, 2011). The bus services operating in and around Elgin are detailed below.

**Table 5: Elgin bus services**

Service No.	Route	Days Available
<b>10/10A/X10</b>	Aberdeen - Huntly - Keith - Elgin - Forres - Nairn - Inverness	Monday to Sunday
<b>11/JET</b>	Elgin - Forres - Nairn - Inverness Airport - Inverness	Monday to Sunday
<b>31/31A</b>	Elgin - Findhorn - Forres	Monday to Saturday
<b>32</b>	Burghead Hopeman - - Elgin - Bishopmill	Monday to Saturday
<b>33A/33C</b>	Pinefield- Manitoba –Thornhill –Dr Grays- Elgin bus Station- Lossiemouth	Monday to Sunday
<b>34</b>	Kingston – Lhanbryde – Elgin- Bishopmill	Monday to Saturday
<b>35/35A</b>	Aberdeen - Turriff - Banff - Buckie - Elgin - Forres - Nairn - Inverness	Monday to Sunday
<b>36</b>	Dufftown – Aberlour – Elgin	Monday to Saturday
<b>302</b>	Elgin- Keith – Aberchirder - Macduff	Tuesday and Friday
<b>363</b>	Tomintoul - Aberlour - Elgin	Thursday

3.21 There are number of both Council and private operated car parks within the town centre providing 1472 car park spaces, with car parking charged at £1 for up to 2 hours parking, or £3 for 2 to 4 hours parking and £4 for 4 to 10 hours parking. Parking all day at Lossie Green and Lossie Wynd is charged at £1. There is also extensive on-street parking within the town centre. *Table 6* below, summarises the Council operated car parking provision in the town centre.

**Table 6: No. Of Public Car Parking Spaces in Elgin**

No. Of Spaces (as at 05/09/2012)								
Car Park	Car	Disabled	Parent & Child	M/C	Bus	Lorry	Cycle	Pay & Display
<b>Batchen Lane</b>	210	6	7	1				Mon-Sat
<b>Hall Place</b>	28	1						Mon- Sat
<b>Greyfriars Street</b>	63	4						Sat *
<b>HQ Annexe</b>	147	10		4				Sat*
<b>Ladyhill Road</b>	40	3		1				Mon- Sat
<b>Lossie Green</b>	349	7		9		13	3	Mon- Sat
<b>Lossie Wynd</b>	78	2						Mon- Sat

<b>Moray Street</b>	102	3	1	Mon- Sat
<b>Moray Street (office)</b>	5	2		Sat*
<b>Northfield Terrace</b>	74	2		Mon- Sat
<b>North Port</b>	88	10		Mon- Sat
<b>South Street</b>	18	1		Mon- Sat
<b>St. Giles Road</b>	270	13	1	Mon- Sat

\*Car parking available only on Saturdays.

### Environmental Quality

- 3.22 The visual character of Elgin is characterised by the visual landmarks of Ladyhill and the Duke of Gordon monument, Elgin Cathedral, St. Giles Church, Dr. Gray's Hospital, the Anderson Institute and other significant vertical markers. The historic development of Elgin can clearly be detected in the urban form, most notably the linear market place of High Street and the narrow closes which open onto it. The centre has 109 listed buildings and is a designated Conservation Area. The historic environment creates a largely attractive environment, although the appearance of some buildings is tired and unkempt.
- 3.23 In line with other local authorities in Scotland, Moray Council produces LEAMS reports, which utilise Keep Scotland Beautiful's "Cleanliness Index Monitoring System"<sup>3</sup>. This report provides a standardised technique for assessing street cleansing and provides a basis for comparing different towns. Streets are surveyed on an annual basis and graded using the "Cleanliness Index Monitoring System" (e.g. Grade A; B; C; and D). According to the most recent LEAMS report, the majority of inspections undertaken within Elgin town centre were scored as Grade B for cleanliness. Only three inspections were recorded at grade C, two of these were previously or inspected at a later date and graded higher. All other inspections were graded at B or above.

### Tourism

- 3.24 The findings of the Diversity of Uses survey, undertaken by Moray Council staff, found there are six hotels and guesthouses, nine restaurants, 11 bars and pubs, and seven cafes located within Elgin town centre. Elgin Museum is located at 1 High Street and a Tourist Information office is located in Elgin Library, which lies just outside the town centre boundary.

### Elgin Summary

- 3.25 Elgin town centre is an attractive centre which plays an important role in the region. The town centre provides a good range of comparison and convenience retailing

<sup>3</sup> See Keep Scotland Beautiful- [www.keeptoscotlandbeautiful.org](http://www.keeptoscotlandbeautiful.org) for further information.

with a good mix of national multiple retailers and independent stores. This provision is supported by a wide range of other town centre uses that reflect Elgin's role as the principle centre in the region. The Conservation Area and attractive built environment create a pleasing built realm for shoppers.

- 3.26 The vacancy rate accounts for 9.8% of the total number of Comparison, Convenience, Retail and Leisure Service units within the centre, and is below the current Scottish average of 10%. This is an indication of the relative health of the centre.
- 3.27 There are parts of the town centre, including the Lossie Green area that could be enhanced and some of the entrances into the city centre are poor in terms of their legibility and attractiveness.

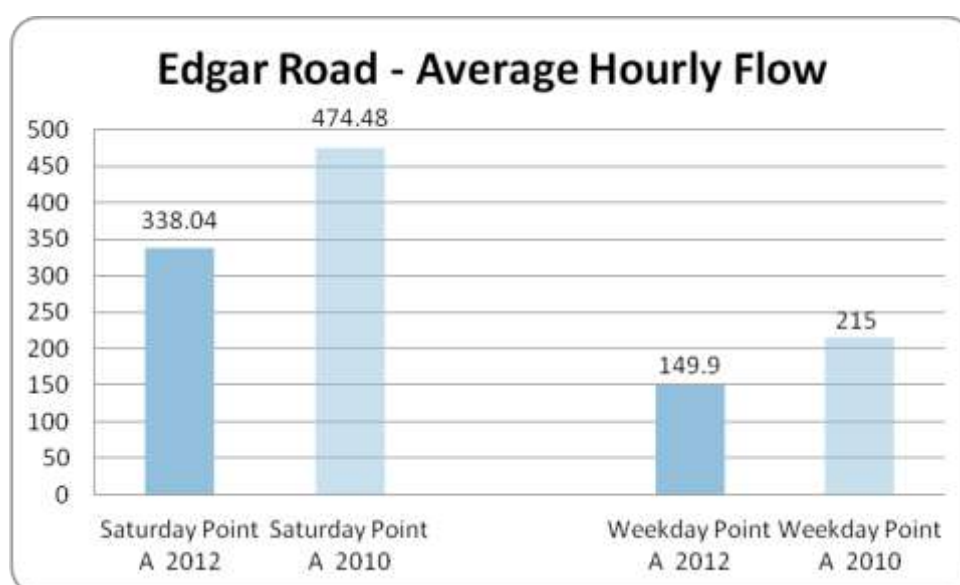
#### **4. Edgar Road Health Check**

- 4.1 Although not part of Elgin town centre, the Edgar Road area (including the Edgar Road and Springfield Retail Parks) is a major commercial centre and a key focus for substantial retail activity. The following Vitality and Viability Indicators have been examined for this area: Pedestrian Footfall; Diversity of Uses; Retailer Representation; Vacancy Rates; and Accessibility.

##### **Pedestrian Footfall**

- 4.2 A pedestrian flow count was undertaken by Moray Council staff on Saturday 1<sup>st</sup> and Friday 21<sup>st</sup> September 2012 at the Springfield Retail Park. Pedestrians, who crossed a point between NEXT and the vacant Peacock store, were counted between 10.00 to 16.30. Caution should be applied when interpreting these results, given the layout of the retail park, a significant number of pedestrians who were shopping in the area didn't cross the count point; therefore, the results outlined below may be misleading.
- 4.3 An overview of the average hourly flows is summarised in the *Chart 3 below* with comparison to the 2010 results. This shows that the average hourly flows are down on 2010, approximately 29% on Saturday and 30% on Friday.

Chart 3: Edgar Road – Average Hourly Flow



### Diversity of Uses

- 4.4 Information on the retail mix of the Edgar Road area of Elgin is set out below. The dominant use is Comparison retailing. Only a small number of units are for Convenience goods but these include the Asda and Allarburn Dairy therefore these make up a significant proportion of the area's floor space.

Table 7: Edgar Road Diversity of Uses

Summary of Edgar Road Diversity of Uses Survey				
Type of Use	July 2012		July 2010	
	No. of Outlets	Floor space (sqm)	No. Of Outlets	Floor space (sqm)
Comparison	15	18046.5	15	18432
Convenience	2	12386.8	2	12438
Retail Service	3	626	0	
Leisure Service	1	269.5	1	
Financial & Business Service	4		0	
Health & Medical	1		1	
Public Service	1		1	
Religious Service	1		0	
General Office Use	0		0	
Vacancy	9	6375.16	9	6878

<b>Total</b>	<b>30</b>	<b>37703.96</b>	<b>27</b>	<b>37748</b>
--------------	-----------	-----------------	-----------	--------------

### Retailer Representation

- 4.5 There are 16 national (Scottish/UK) multiples in the Edgar Road Area out of a total of 20 retail goods shops– that is 80%. This figure is can be contrasted to Elgin town centre, where 31% of the retail goods shops are currently multiples.

### Vacancy Rates

- 4.6 *Table 7* above indicates that the number of vacant units identified by Moray Council planning staff was 9, which is a vacancy rate of 30%. Floor space data obtained from previous planning application documents indicates that there is approximately 6375.16 sqm of vacant floor space in the Edgar Road area. There is approximately 157m of vacant retail frontage in the Edgar Road Retail Park (figure obtained by scaling off OS-base plans).

### Accessibility

- 4.7 Edgar Road is served by both public and private transport. Route numbers 33A and 33C (Pinefield-Manitoba-Thornhill-Dr Grays- Elgin Bus Station– Lossiemouth) service the route at twenty minute intervals Monday to Saturday and hourly on Sundays. Elgin train station is located on Station Road just outside the boundary of the Edgar Road survey area and provides local, regional and national connections. Access across the railway line is via a pedestrian bridge. Both Asda and B&Q provide cycle rack facilities.

### Edgar Road Summary

- 4.8 The Edgar Road area of Elgin provides a significant concentration of trading retail floor space. It is notable that the area has 15 comparison goods retail units (18,046 sqm). Only a small proportion of units are for convenience goods but this includes Asda and therefore a significant proportion of the area's floor space is given over to Convenience.
- 4.9 The number of vacant units was 9, which is a vacancy rate of 30%. Floor space data obtained from previous planning application documents indicates that there is approximately 6,375 sqm of vacant floor space in the Edgar Road area.

## 5. Forres Town Centre Health Check

### Pedestrian Footfall

- 5.1 A pedestrian flow count was undertaken by Moray Council staff on Thursday 20th (between 14.00 and 17.00) and Saturday 22nd September 2012 (between 10.00 and 13.00). Pedestrian footfall data was collected at two positions throughout the town

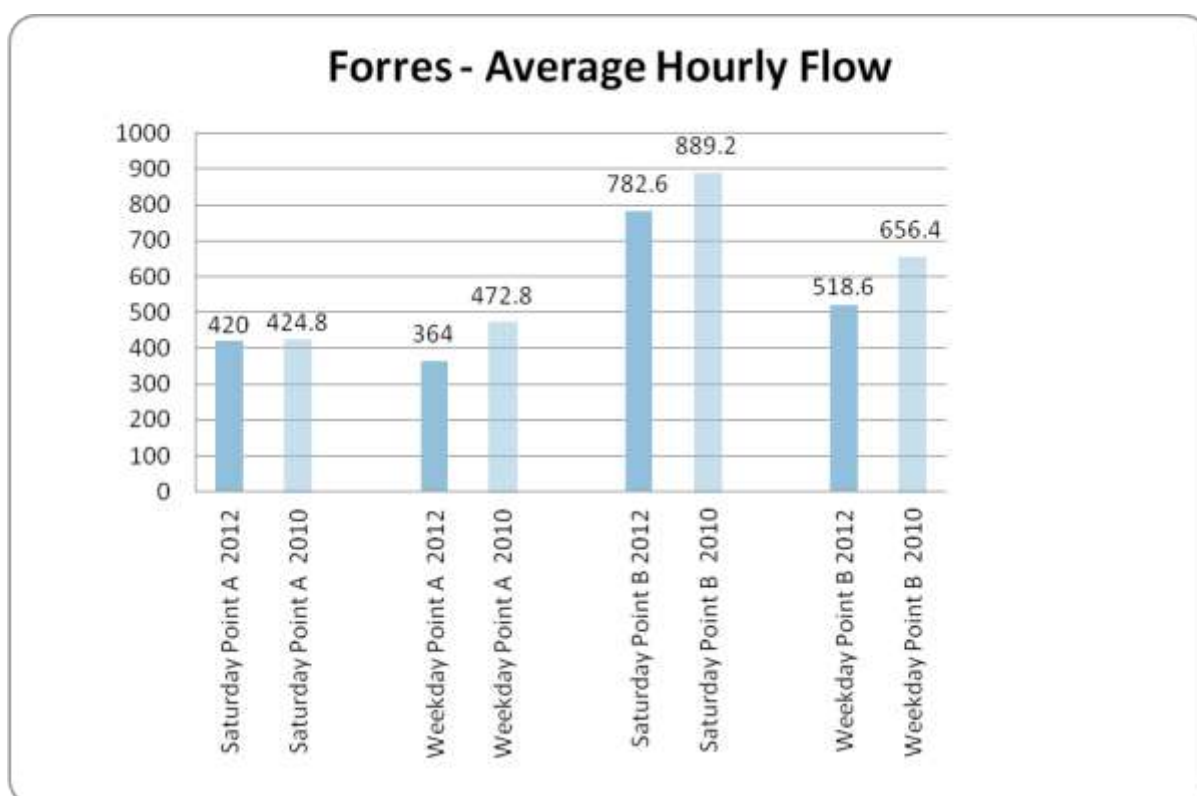
centre. The survey locations are provided below with a plan of the footfall survey location is provided in Appendix II.

**Table 8: Details of Forres Footfall Survey**

Enumeration Point	Location
A	No. 42 High Street- (Superdrug)
B	No. 90 High Street- (Boots Chemist)

- 5.2 Of the two locations point B recorded the busiest footfall on both Thursday and Saturday. The lowest pedestrian flow count in the town centre was recorded at the north-eastern end of High Street, at point A. This was lower by approximately 46% on Saturday and 30% on Thursday when compared to Point B.
- 5.3 An overview of the average hourly flows recorded with a comparison to 2010 survey is shown below. Generally the average flow in 2012 is lower than 2010. The biggest fall was at Point A on the Thursday where the average flow had dropped by 23% compared to 2010.

**Chart 4: Forres Average Hourly Pedestrian Flow**



- 5.4 Analysis of the Thursday count revealed that overall, 39.3% of the total flow occurred between 14.00 and 15.00, whilst 34.9% occurs between 15.00 and 16.00. This figure drops to 26.1% after 16.00 hours. Further details of the weekday Time of Day Analysis is illustrated in *Table 9* below.



**Table 9: Forres- Time of Day Analysis- Thursday 20th September 2012**

Enumeration Point		14.00-15.00	%	15.00-16.00	%	16.00-17.00	%
<b>A</b>	No. 42 High Street- (Superdrug)	119	43.6%	86	31.5%	70	25.6%
<b>B</b>	No. 90 High Street- (Boots Chemist)	141	36.2%	145	37.3%	103	26.5%
<b>Total</b>		<b>260</b>	<b>39.3%</b>	<b>231</b>	<b>34.9%</b>	<b>173</b>	<b>26.1%</b>

- 5.5 The Saturday count revealed that overall the lowest flow (27.9%) occurred between 10.00 and 11.00 increasing thereafter. Further details of the Time of Day Analysis recorded on Saturday 22nd September is illustrated in *Table 10*.

**Table 10: Forres- Time of Day Analysis- Saturday 22nd September 2012**

Enumeration Point		10.00-11.00	%	11.00-12.00	%	12.00-13.00	%
<b>A</b>	No. 42 High Street- (Superdrug)	84	26.7%	121	38.4%	110	34.9%
<b>B</b>	No. 90 High Street- (Boots Chemist)	168	28.6%	202	34.4%	217	37.0%
<b>Total</b>		<b>252</b>	<b>27.9%</b>	<b>323</b>	<b>35.8%</b>	<b>327</b>	<b>36.3%</b>

- 5.6 In general the distribution of footfall is similar to that in 2010 with the peak occurring around lunch time and footfall falling after 13.00. The main difference between 2010 and 2012 is that between 16.00-17.00 in 2010 footfall increased significantly but in 2012 it continued to decrease.

### **Diversity of Uses**

- 5.7 Information on the retail mix of Forres town centre is set out below. The dominant uses within Forres are Comparison retailing (e.g. clothing and footwear) with significant numbers of Retail and Leisure Services (e.g. hairdressers; cafes; travel agents; pubs etc.). Forres town centre provides a range of Convenience shopping however Tesco and Lidl have developed out of centre. There is also a significant number of Financial and Business Services located within Forres town centre.
- 5.8 The overall mix of uses and the quantum of floor space they occupy is summarised in the table below.

**Table 11: Diversity of Uses Forres**

Summary of Forres Diversity of Uses Survey	
July 2012	July 2010

Type of Use	No. of Outlets	Floor space (sqm)	No. Of Outlets	Floor space (sqm)
Comparison	32	3917.2*	34	4701
Convenience	15	2389.6**	12	2269
Retail Service	22	2449.1	17	1316
Leisure Service	23	1386.6***	22	1469
Financial & Business Service	21	4316****	14	3741
Health & Medical	3		4	
Public Service	11		8	
Religious Service	4		3	
General Office Use	6		14	
Vacancy	10	3567.9	7	2274
<b>Total</b>	<b>147</b>	<b>18026.4</b>	<b>135</b>	<b>15770</b>
<b>Notes:</b>  <b>*No floor space data for Orchard Road</b>  <b>**No floor space data for 97j High Street</b>  <b>***The Regional Assessor does not hold floor space data for Hotels and Public House premises</b>  <b>****No floor space data for Lea Road</b>				

- 5.9 The centre also provides a good range of non-retail services in the town centre including: a museum; volunteer offices; a credit union; churches; the town hall; a public library; and the Forres Learning Centre, which forms part of Moray College.

### Retailer Representation

- 5.10 There are 15 national (Scottish/UK) multiples in the town centre out of a total of 69 retail goods/services shops– that is 21%. Six (8.6%) units within the town centre were identified to be charity shops. Much of Forres’s character comes from its independent retail provision.

### Vacancy Rates

- 5.11 *Table 11* above indicates that the number of vacant units identified by Moray Council planning staff was 10, which is a vacancy rate of 9.8%- which is slightly below the average rate for Scotland. Vacancies in Forres have increased from 6 vacant units (7.61%) since this indicator was previously collected for Forres in 2010.

- 5.12 Floor space data obtained from the Regional Assessor indicates that there is approximately 3567.9 sqm of vacant floor space in Forres town centre. There is approximately 42 m of vacant retail frontage in the town centre (figure obtained by scaling off OS-base plans). This figure excludes the vacant Tesco building on Gordon Street. This figure equate to approximately 5.74% of the retail frontage of the traditional shopping streets in the town centre- (e.g. the core retail area of High Street and Tolbooth Street). This is a decrease from the 7.27% found in 2010.

### Accessibility

- 5.13 There are a number of car parks in Forres town centre, including five that are publicly owned and maintained by Moray Council which proved 358 car park spaces and are free to use. *Table 12* below summarises the number of public car parking spaces provided in Forres town centre.

*Table 12: No. of Car Parking Space in Forres*

No. of Spaces (as at 05/09/2012)								
Car Park	Car	Disabled	Parent & Child	M/C	Bus	Lorry	Cycle	Pay & Display
Cumming Street	11	1						Free
High Street	42	5		1				Free
Leask Road	62	4						Free
Leys Road	57	4						Free
Orchard Road	112	7		1				Free
Tulloch Park	74	2						Free

- 5.14 Forres is well served by public transport and a number of regional bus routes include the centre. Forres rail station is located quite a distance from the town centre; however, it provides regular rail services to Inverness and Aberdeen. Forres is located only 30 minutes from Inverness Airport

### Environmental Quality

- 5.15 The town centre falls within a Conservation Area and contains high numbers of historic buildings. Whilst the buildings on the High Street and other core trail street are generally in reasonable condition some of the more residential streets leading off the High Street are more tired with some buildings in a poor state of repair. Although the historic streetscapes help create an aesthetically pleasing environment, traffic is a concern in parts of the centre, especially on High Street. Many of the retailers receive deliveries through their frontage which can lead to traffic hold-ups.

- 5.16 According to the most recent LEAMS report, Forres High Street scored a Grade B for cleanliness. Other Streets within the town centre either scored a grade B or A, with only one inspection out of the 37 undertaken being graded at C.

### Tourism

- 5.17 Forres is a popular destination for tourists with a number of buildings offering tourist attractions including the Falconer Museum. The Museum attracted 14,677 visitors in 2009<sup>4</sup>. The attractive urban environment is also a strength of the town for visitors and tourists.
- 5.18 The findings of the Diversity of Uses surveys found there are two hotels and guesthouses, six restaurants and cafes and five bars and pubs located within Forres town centre.

### Forres Summary

- 5.19 Forres is historically an important town centre for the local community and the tourist economy. There are clear strengths within the centre. The Conservation Area and the quality of the built environment, create a pleasing built realm for shoppers. Forres town centre provides a good range of convenience goods shopping (including the Co-operative store on High Street) and reasonable range of comparison goods shops.
- 5.20 The number of vacant units identified was 10, which is a vacancy rate of 9.8%- which is slightly below the average rate for Scotland and is comparable to Elgin. Overall Forres displays signs of being a vital and viable town centre.

## 6. Keith Town Centre Health Check

### Pedestrian Footfall

- 6.1 A pedestrian flow count was undertaken by Moray Council staff on a Saturday 8<sup>th</sup> (between 10.00 and 13.00) and Friday 14<sup>th</sup> (between 14.00 and 17.00) September 2012. Pedestrian footfall data was collected at two positions. Details of the survey locations are provided below with a plan provided in Appendix II.

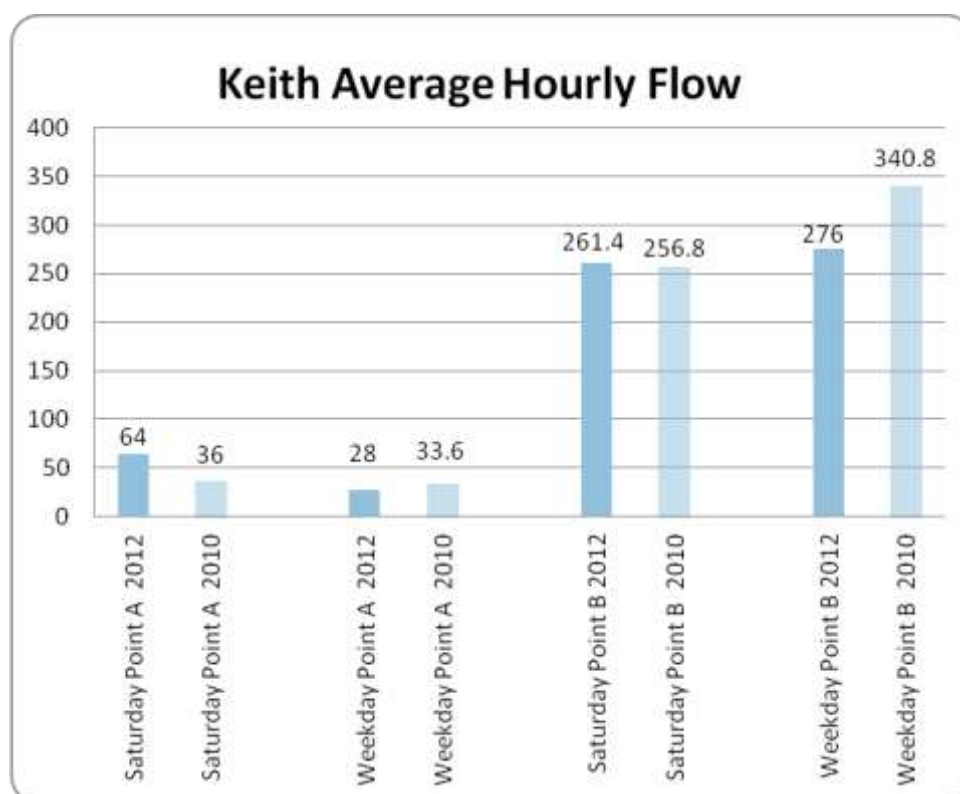
**Table 13: Details of Keith Footfall Survey**

Enumeration Point	Location
A	No. 140 Moss Street- (Pedestrian Crossing on A96 to access TESCO)
B	No.130-132 Mid Street- (Post Office)

<sup>4</sup> Source: Visit Scotland: The 2009 Visitor Attraction Monitor, 2010

- 6.2 Of the two locations, point B recorded the busiest footfall on both Friday and Saturday. The Friday figure is down some 19% compared to 2010 however the Saturday figure is up marginally, approximately 1.8 %.
- 6.3 The lowest pedestrian flow count in the town centre was recorded at the pedestrian crossing on the A96 to access TESCO on both Friday and Saturday. Although extremely low pedestrian activity was recorded at Point A, the average flow on Saturday was around 77% higher than that in 2010.
- 6.4 Overviews of the average hourly flows with the comparable figures for 2010 are recorded below in *Chart 5*.

*Chart 5: Keith Average Hourly Pedestrian Flow*



- 6.5 Analysis of the Friday count revealed that overall, pedestrian flow was highest between 15.00 and 16.00 when 48.2% of the overall footfall occurred. It was noted that at this time there were many from the primary and secondary school. The footfall dropped significantly after 16.00 to 19.3% of the overall total. Further details of the weekday Time of Day Analysis is illustrated in *Table 14*.

**Table 14: Keith- Time of Day Analysis- Friday 14th September 2012**

Enumeration Point		14.00-15.00	%	15.00-16.00	%	16.00-17.00	%
<b>A</b>	No. 140 Moss Street (Pedestrian Crossing on A96 to access TESCO)	11	52.4%	6	28.6%	4	19.0%
<b>B</b>	No. 130-132 Mid Street- (Post Office)	63	30.4%	104	50.2%	40	19.3%
<b>Total</b>		<b>74</b>	<b>32.5%</b>	<b>110</b>	<b>48.2%</b>	<b>44</b>	<b>19.3%</b>

- 6.6 Analysis of the Saturday count revealed pedestrian flow was relatively consistent throughout the morning. Further details of the Time of Day Analysis recorded on Saturday 8<sup>th</sup> September is illustrated in *Table 15* below.

**Table 15: Keith- Time of Day Analysis- Saturday 8th September 2012**

Enumeration Point		10.00-11.00	%	11.00-12.00	%	12.00-13.00	%
<b>A</b>	Pedestrian Crossing on A96 to access TESCO	11	22.9%	13	27.1%	24	50.0%
<b>B</b>	Mid Street- (Post Office)	66	33.7%	70	35.7%	60	30.6%
<b>Total</b>		<b>77</b>	<b>31.6%</b>	<b>83</b>	<b>34%</b>	<b>84</b>	<b>34.4%</b>

- 6.7 The distribution of footfall is across the day is quite different to that of 2010. In 2010 the footfall was lowest in the morning, rising in the afternoon. However in 2012 footfall was relatively steady in the morning rising to a dramatic peak in the afternoon between 15.00 and 16.00 before dropping sharply after 16.00. This sharp drop did not occur in 2010.

### Diversity of Uses

- 6.8 Information on the retail mix of the town centre is set out below. The dominant use within the town centre is Comparison shops with Convenience and Retail Services also contributing significantly to the mix of uses.
- 6.9 In terms of diversity of retail uses, within the town centre boundary, the overall mix of uses is summarised in the table below.

**Table 16: Keith Diversity Uses**

Summary of Keith Diversity of Uses Survey				
July 2012			July 2010	
Type of Use	No. of Outlets	Floor space (sqm)	No. Of Outlets	Floor space (sqm)

<b>Comparison</b>	29	5308.9*	24	4949
<b>Convenience</b>	12	1777.3	11	1353
<b>Retail Service</b>	10	956.1**	12	722.5
<b>Leisure Service</b>	18	1011.5***	19	1360
<b>Financial &amp; Business Service</b>	13	1545.9	11	1209
<b>Health &amp; Medical</b>	0		0	
<b>Public Service</b>	2		2	
<b>Religious Service</b>	1		2	
<b>General Office Use</b>	5		7	
<b>Vacancy</b>	10****	958.8	6	765
<b>Total</b>	<b>100</b>	<b>11558.5</b>	<b>94</b>	<b>10358.5</b>
<b>Notes:</b>  <b>*No floor space data for 31 and 51 Regent Street</b>  <b>** No data for garage</b>  <b>***The Regional Assessor does not hold floor space data for Hotels and Public House premises.</b>  <b>**** No floor space data for vacant pub.</b>				

### Retailer Representation

- 6.10 There are seven national (Scottish/UK) multiples in the town centre out of a total of 51 retail goods/services shops– that is 13.7%. Keith has a strong independent sector with the majority of shops being local stores with a distinct identity. In terms of Convenience, a Co-op store (399.6 sq m) is located within the town centre on Mid Street. The Tesco store is located off Moss Street, adjacent but out with the defined town centre boundary. Two units (3.9%) within the town centre were identified to be charity shops.

### Vacancy Rate

- 6.11 *Table 16* above indicates that the number of vacant units identified was 10, which is a vacancy rate of 12.7%- this is higher than the national average of 10%. It is also an increase from the six units recorded in 2010.
- 6.12 Floor space data obtained from the Regional Assessor indicates that there is approximately 958.8 sqm of vacant floor space in Keith. There is approximately 94.6m of vacant retail frontage in the town centre (figure obtained by scaling off OS-base plans). This figure equates to approximately 9.7% of the retail frontage on the

traditional shopping street in Keith, which is Mid Street. An increase from the 7.9% reported in 2010.

### Accessibility

- 6.13 Keith has good road connections via the A96 running through the town. The centre is also served by frequent bus services which connect the town to neighbouring centres and smaller settlements as well as national coach services. Keith train station is located quite a distance from the town centre.

*Table 17: Keith Bus Services*

Service No.	Route	Days Available
<b>10/10A/X10</b>	Aberdeen - Huntly - Keith - Elgin - Forres - Nairn - Inverness	Monday to Sunday
<b>302</b>	Elgin- Keith – Aberchirder - Macduff	Tuesday and Friday

- 6.14 There are several car parks in Keith, with 211 spaces provided in Council run car parks as well as on street parking in the town centre. The car parks offer free parking. *Table 18* below summarises the number of car parking spaces provided in Keith town centre.

*Table 18: No. of Car Parking Spaces in Keith*

No. of Spaces (as at 05/09/12)								
Car Park	Car	Disabled	Parent & Child	M/C	Bus	Lorry	Cycle	Pay & Display
<b>Bankers Lane</b>	15	1						Free
<b>Coopers Lane</b>	12	1						Free
<b>Innes Lane</b>	36	1						Free
<b>Mid Street</b>	40	2						Free
<b>Regent Square</b>	36	1						Free
<b>Reidhaven Square</b>	59	6		1				Free

### Environmental Quality

- 6.15 Keith Town Centre benefits from being a Conservation Area. Much of the town centre is of reasonable environmental quality and contains a number of listed buildings. The quality of environment is poorer in some locations within the town centre including vacant buildings around the south end of Mid Street. The Keith Conservation Area Regeneration Scheme will see significant investment within the Mid Street Conservation Area and will run from April 2011 to March 2016. Repairs



will be undertaken to key traditional buildings with a grant scheme for other property owners to repair traditional shop fronts, sash and case windows, cast iron rain water goods and other external repairs.

- 6.16 According to the most recent LEAMS report, Mid Street scored Grade A for cleanliness. The majority of inspections undertaken were Grade A with only eight out of the 19 inspections being scored as Grade B.

### Tourism

- 6.17 The findings of the Diversity of Uses surveys, undertaken by Moray Council staff, found there are six hotels and guesthouses located within Keith town centre. Whilst no restaurants were identified in the town centre five cafes and two pubs were noted.

### Keith Summary

- 6.18 There is a reasonable range of convenience goods shopping and comparison goods shops and a good range of retail services available for a town of this size. It is notable that the area has 29 comparison goods retail units; 12 convenience outlets; and 10 retail service units.
- 6.19 There are, however, some weaknesses in the centre. The number of vacant units identified by Moray Council planning staff was 10, which is a vacancy rate of 13.7% - which is above the Scottish average of 10%. A proliferation of vacant buildings is a particular problem around the south end of Mid Street.
- 6.20 In overall terms, the centre exhibits comparatively weaker signs of vitality and viability, than the town centres of Elgin, Forres and Buckie.

## 7. Buckie Town Centre Health Check

### Pedestrian Footfall

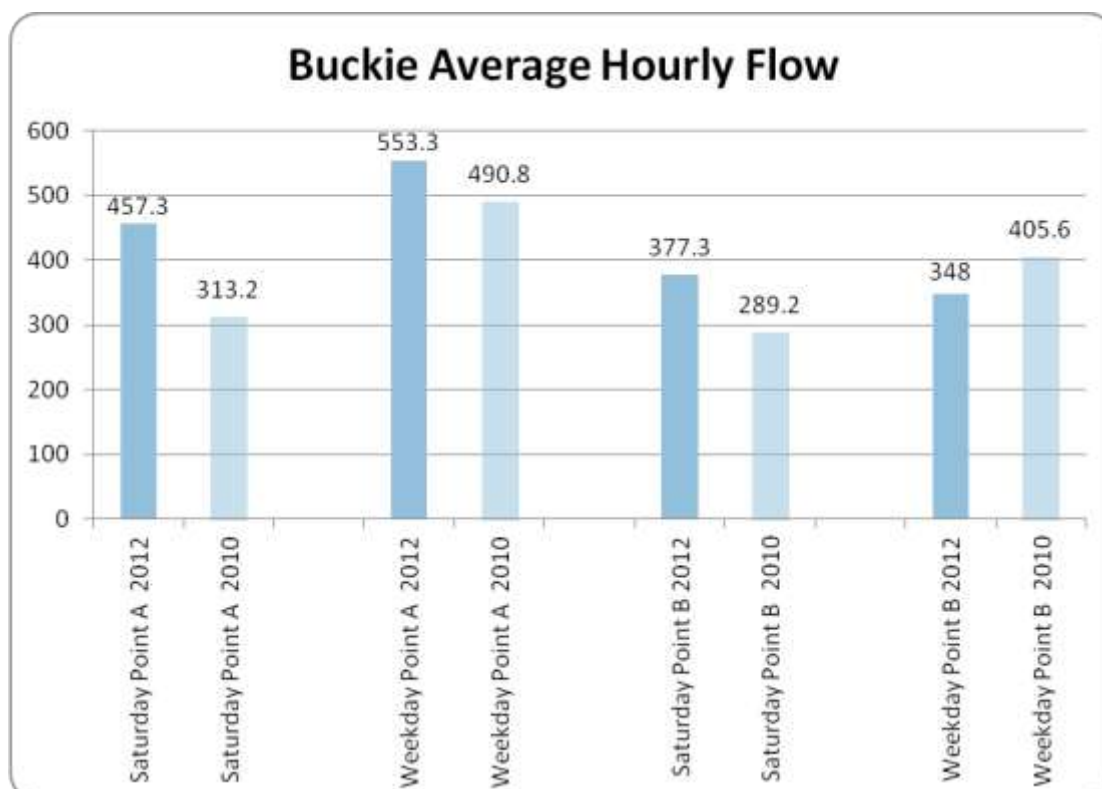
- 7.1 A pedestrian flow count was undertaken by Moray Council staff on Saturday 8<sup>th</sup> September (between 14.00 and 17.00) and Friday 14<sup>th</sup> September 2012 (between 10.00 and 13.00). Details of the survey locations are provided below with a plan provided in Appendix II.

*Table 19: Details of the Buckie Footfall Survey*

Enumeration Point	Location
A	No. 3 High Street
B	No.3-5 East Church Street-

- 7.2 Of the two locations, the position at point A recorded the busiest footfall on Friday and Saturday. Unusually the weekday count was higher than the Saturday, but both were higher than the average flows recorded in 2010.
- 7.3 At point B the average hourly flow on Saturday was 30% higher than that in 2010, however the average flow on the Friday was 14% lower than 2010.
- 7.4 An overview of the average hourly flows together with the 2010 results are summarised in *Chart 6*.

*Chart 6: Buckie Average Hourly Pedestrian Flow*



- 7.5 Analysis of the Friday count revealed that overall, pedestrian flow dipped between 11.00 and 12.00 to 30.5%. Between 10.00 and 11.00 the pedestrian flow was 37.1% of the overall total, and peaked at 40.4% between 12.00 and 13.00. Further details of the weekday Time of Day Analysis is illustrated in *Table 20* below.

*Table 20: Buckie- Time of Day Analysis- Friday 14th September 2012*

Enumeration Point		10.00-11.00	%	11.00-12.00	%	12.00-13.00	%
<b>A</b>	No. 3 High Street- (Asher's Bakery)	145	34.9%	108	26%	162	39%
<b>B</b>	No.3-5 East Church Street-	87	33.3%	83	31.8%	91	34.9%
<b>Total</b>		<b>232</b>	<b>37.1%</b>	<b>191</b>	<b>30.5%</b>	<b>253</b>	<b>40.4%</b>

- 7.6 Analysis of the Saturday count revealed that 45.8% and 32.4% of the overall footfall occurred between the periods 14.00 to 15.00 and 15.00 to 16.00 respectively decreased to 21.7% during the period 16.00 to 17.00. Further details of the Time of Day Analysis recorded on Saturday 8<sup>th</sup> September is illustrated in *Table 21* below.

**Table 21: Buckie- Time of Day Analysis- Saturday 8th September 2012**

	<b>Enumeration Point</b>	<b>14.00-15.00</b>	<b>%</b>	<b>15.00-16.00</b>	<b>%</b>	<b>16.00-17.00</b>	<b>%</b>
<b>A</b>	No. 3 High Street- (Asher's Bakery)	152	443%	127	37%	64	18.7%
<b>B</b>	No.3-5 East Church Street- (Nationwide)	135	47.7%	76	26.9%	72	25.4%
	<b>Total</b>	<b>287</b>	<b>45.8%</b>	<b>203</b>	<b>32.4%</b>	<b>136</b>	<b>21.7%</b>

- 7.7 The distribution of footfall across the day was markedly different to that in 2010. In 2010 footfall peaked between 11.00 and 12.00 before falling to a low between 14.00 and 15.00. Footfall thereafter slightly increased. In 2012 the footfall decreased before rising to a peak between 14.00 and 14.55, at this time in 2010 footfall was decreasing. In 2012 after the rise footfall dropped more sharply, whereas in 2010 whilst lower footfall was recorded over this period it was relatively steady.

### Diversity of Uses

- 7.8 Information on the retail mix of Buckie town centre is set out below. The dominant use is Comparison retailing. There is a reasonable range of Convenience shopping and a good range of Retail Services available for a town of this size. The overall mix of uses and the quantum of floor space they occupy is summarised in the table below.

**Table 22: Buckie Diversity of Uses**

<b>Summary of Buckie Diversity of Uses Survey</b>				
<b>July 2012</b>			<b>July 2010</b>	
<b>Type of Use</b>	<b>No. of Outlets</b>	<b>Floor space (sqm)</b>	<b>No. Of Outlets</b>	<b>Floor space (sqm)</b>
<b>Comparison</b>	35	6611.4*	33	4873
<b>Convenience</b>	8	2289.2**	9	3685
<b>Retail Service</b>	17	1682	14	989

Leisure Service	19	2000.2***	13	1283
Financial & Business Service	17	2556.1	17	1797
Health & Medical	1		1	
Public Service	4		4	
Religious Service	4		3	
General Office Use	6		5	
Vacancy	4	333.4	4	453
<b>Total</b>	<b>116</b>	<b>15472.3</b>	<b>103</b>	<b>17486</b>
<b>Notes:</b>  <b>*No floor space data for The Original Factory Shop</b>  <b>** No floor space data for 32-34 East Church Street (Co-op)</b>  <b>** *The Regional Assessor does not hold floor space data for Hotels and Public House premises.</b>				

- 7.9 Within Buckie town centre, there are also a number of 'town centre' facilities that are used after shopping hours for activities such as eating and drinking. The town contains a number of public houses such as the bar in the Cluny Hotel as well as a collection of restaurants and cafes.

### Retailer Representation

- 7.10 There are 13 national (Scottish/UK) multiples in the town centre out of a total of 60 retail goods/services shops– that is 21%. Three units (5%) were identified to be charity shops.

### Vacancy Rate

- 7.11 *Table 22* above indicates that the number of vacant units identified by Moray Council planning staff was four, which is a vacancy rate of 4.8%. This is well below the national average and comparable to the vacancies found in 2010.
- 7.12 Floor space data obtained from the Regional Assessor indicates that there is approximately 333.4sqm of vacant floor space in Buckie town centre. There is approximately 26m of vacant retail frontage in the town centre (figure obtained by scaling off OS-base plans). This figure equate to approximately 2.6% of the retail frontage of the traditional shopping streets in the town centre- (e.g. the core retail area of East Church Street; West Church Street and High Street). This is a decrease from the 4.5% reported in 2010.

## Accessibility

- 7.13 There are a number of bus services which connect the town to neighbouring centres as well as national coach services. There are several car parks in Buckie with 317 car park spaces provided in Council run car parks (which are free) as well as some on street parking in the town centre. *Table 23* below summarises the number of public car parking spaces provided in Buckie.

*Table 23: No. of Car Parking Spaces in Buckie*

No. of Spaces (as at 05/09/2012)								
Car Park	Car	Disabled	Parent & Child	M/C	Bus	Lorry	Cycle	Pay & Display
Cluny Place	67	6						Free
Cluny Square	62	5		1				Free
Great Eastern Road	20	1						Free
Buckie Drifter	38	2						Free
Marine Place	20	2						Free
Newlands Lane	76	5						Free
North Pringle Street	34	1						Free

## Environmental Quality

- 7.14 The centre has a number of listed buildings in the vicinity of Cluny Square, including the All Saints Episcopal Church Hall on West Church Street.
- 7.15 According to the most recent LEAMS report, West Church Street, East Church Street and High Street all scored a Grade B for cleanliness. Out of 23 inspections of streets within the town centre all scored B or higher, with 2 streets scoring A.

## Tourism

- 7.16 The findings of the Diversity of Uses survey found there are one hotel and six cafes and restaurants as well as a range of takeaways in Buckie town centre. The Fishing Heritage Centre is located out with the defined town centre boundary.

## Buckie Summary

- 7.17 The low level of vacancy and diverse retail offer of Buckie indicates that the town centre is performing well. There is a reasonable range of convenience goods shopping and comparison goods shops and a good range of retail services available for a town of this size.

7.18 The number of vacant units identified by Moray Council planning staff was 4, which is a vacancy rate of 4.8%- which is significantly lower than Keith (12.7%); Forres (9.8%); and Lossiemouth (10.7%).

7.19 In overall terms, the centre exhibits generally good vitality and viability.

## 8. Lossiemouth Town Centre Health Check

### Pedestrian Footfall

8.1 A pedestrian flow count was undertaken by Moray Council staff on Thursday 20th (between 10.00 and 13.00) and Saturday 22nd September 2012 (between 14.00 and 17.15). Pedestrian footfall data was collected at two positions. Following concerns raised about the count locations chosen in 2010 the location at Pitgaveny Quay was replaced by a location at Queen Street, near the Co-op store. Therefore, comparisons to 2010 can only be made in respect of point B at Clifton Road. Details of the survey locations are provided below with a plan at appendix II.

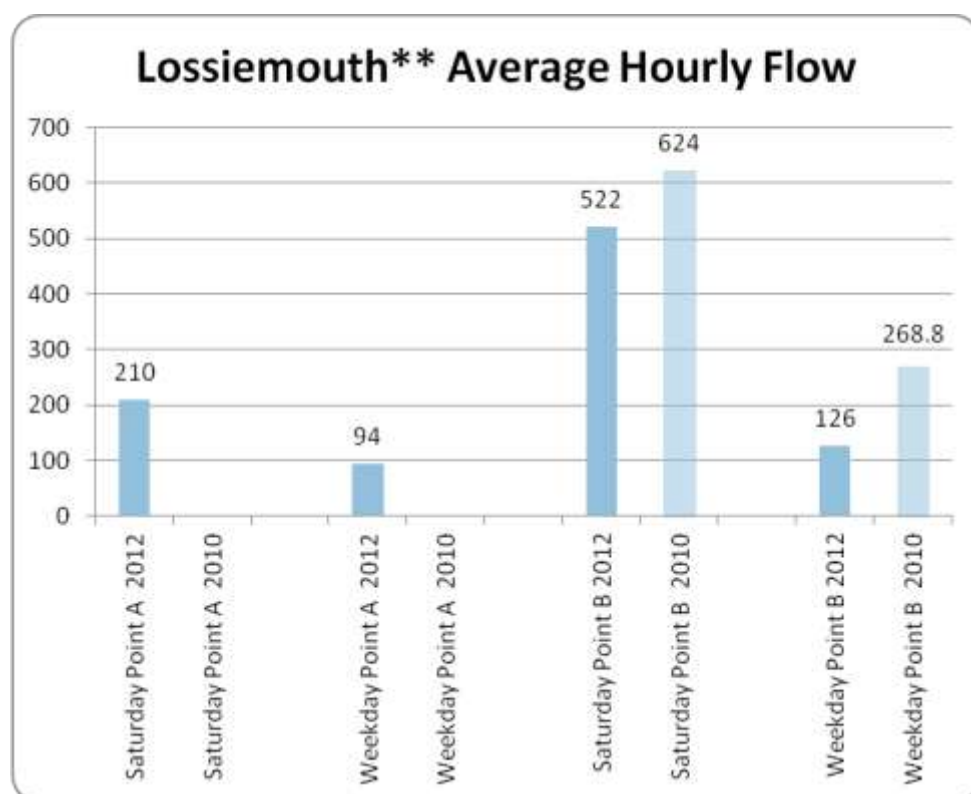
*Table 24: Details of Lossiemouth Footfall Survey*

Enumeration Point	Location
A	No. 80 Queen Street (Co-op)
B	No. 15 Clifton Road- (Rizza's Ices)

8.2 Of the two locations, point B recorded the busiest footfall on Thursday and Saturday. It is notable that the weather conditions were reasonably favourable on both count days, with both days being dry and warm although the Saturday was breezy. However, the footfall is lower than 2010 by approximately 16% on the Saturday and 53% on the Thursday. The lowest pedestrian flow count was recorded point A.

8.3 An overview of the average hourly flows for 2012 together with the 2012 results at point are recorded in *Chart 7* below.

Chart 7: Lossiemouth Average Hourly Pedestrian Flow



\*\* Survey count undertaken at different location in 2010

- 8.4 Analysis of the Thursday count revealed that overall, pedestrian flow was lowest during the 10.00 to 11.00 period and increased significantly to 54.5% between 12.00 and 13.00. Further details of the weekday Time of Day Analysis is illustrated in *Table 25* below.

Table 25: Lossiemouth Footfall- Time of Day Analysis- Thursday 20th September 2012

Enumeration Point		10.00-11.00	%	11.00-12.00	%	12.00-13.00	%
<b>A</b>	No. 78 Queen Street (Co-op)	17	36.2%	11	23.4%	19	40.4%
<b>B</b>	No. 15 Clifton Road- (Rizza's Ices)	6	9.5%	16	25.4%	41	65.1%
<b>Total</b>		<b>23</b>	<b>20.9%</b>	<b>27</b>	<b>24.5%</b>	<b>60</b>	<b>54.5%</b>

- 8.5 Analysis of the Saturday count revealed a more even pattern throughout the afternoon. Further details of the Time of Day Analysis recorded on Saturday 22nd September is illustrated in *Table 26* below.



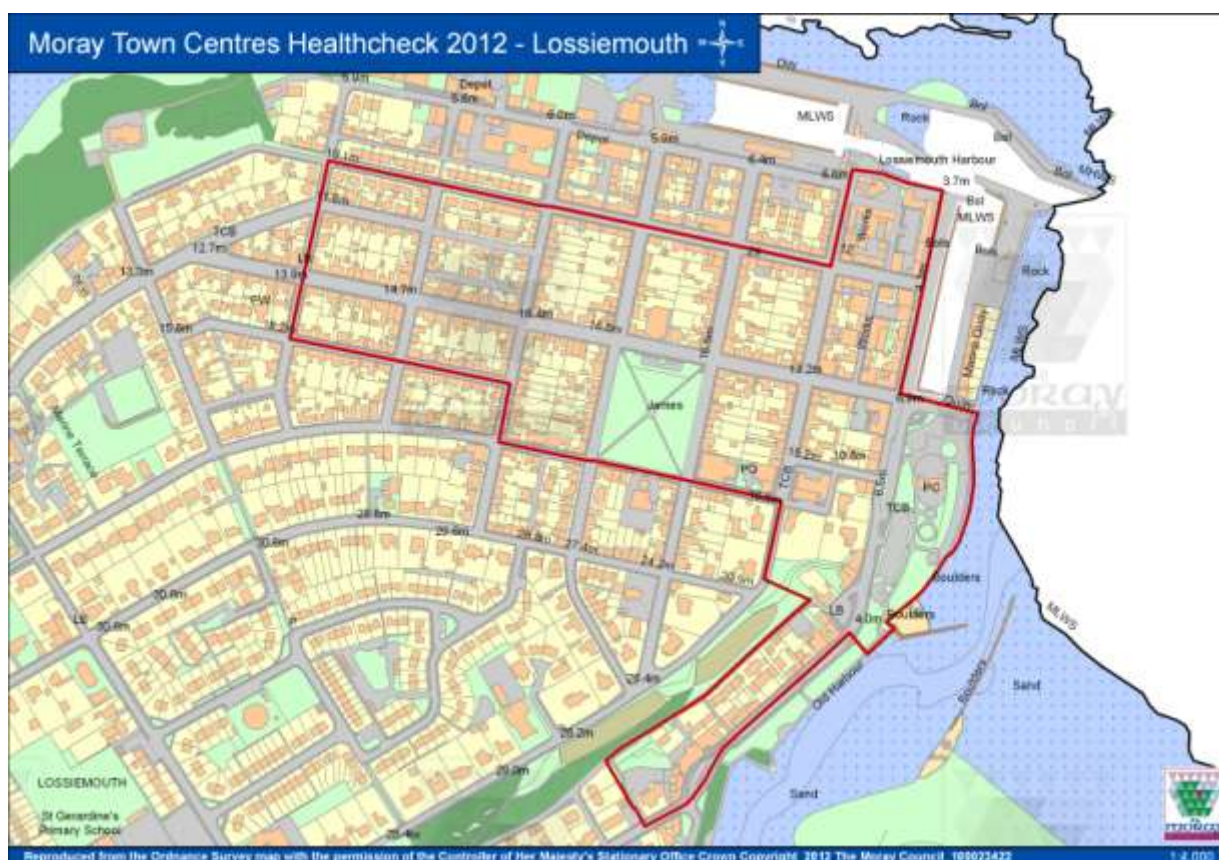
**Table 26: Lossiemouth Footfall- Time of Day Analysis- Saturday 22nd September 2012**

Enumeration Point	14.00-15.00	%	15.00-16.00	%	16.00-17.00	%
<b>A</b> No. 78 Queen Street (Co-op)	37	35.2%	30	28.6%	38	36.2%
<b>B</b> No. 15 Clifton Road- (Rizza's Ices)	83	36.9%	73	32.4%	69	30.7%
<b>Total</b>	120	<b>36.4%</b>	103	<b>31.2%</b>	107	<b>32.4%</b>

- 8.6 Whilst footfall was lower in 2012 than 2010, a similar pattern of the distribution of footfall throughout the day was found with the peak and dips generally occurring at similar times in each year. Generally footfall increased throughout the day, before becoming steadier after 15.00.

### Diversity of Uses

- 8.7 Lossiemouth does not contain a defined 'town centre', however the map of the study area used in 2010 has been used to define the boundaries for the survey. This can be found below (*Map 1*).





- 8.8 The overall mix of uses and the quantum of floor space they occupy is summarised in the table below.

*Table 27: Lossiemouth Diversity of Uses*

Summary of Lossiemouth Diversity of Uses Survey				
July 2012			July 2010	
Type of Use	No. of Outlets	Floor space (sqm)	No. Of Outlets	Floor space (sqm)
Comparison	12	2561.5	11	2048
Convenience	12	594.3	8	669
Retail Service	12	722.3	8	687
Leisure Service	17	1578.6*	14	2167.2
Financial & Business Service	5	755.4**	3	431
Health & Medical	1		2	
Public Service	3		2	
Religious Service	1		0	
General Office Use	1		0	
Vacancy	6	774.2***	6	410
<b>Total</b>	<b>70</b>	<b>6986.3</b>	<b>54</b>	<b>9174.3</b>
<b>Notes:</b>				
* The Regional Assessor does not hold floor space data for Hotels and Public House premises.				
** No floor space data for 5 High Street				
** *No floor space data for 25 Pitgaveny Street (vacant pub).				

### Retailer Representation

- 8.9 There are three national (Scottish/UK) multiples in the town out of a total of 36 retail goods/service shops – that is 8%.

### Vacancy Rate

- 8.10 *Table 27* above indicates that the number of vacant units identified by Moray Council planning staff was 6, which is a vacancy rate of 10.17%- which is around the average trend of 10% for Scotland.

- 8.11 Floor space data obtained from the Regional Assessor indicates that there is approximately 774.2 sqm of vacant floor space in the Lossiemouth study area. There is approximately 73 m of vacant retail frontage in the town centre (figure obtained by scaling off OS-base plans). An increase from 51.8m recorded in 2010.

#### Accessibility

- 8.12 Although there is no railway station within the town, there is reasonable bus. There are frequent services connecting the town to nearby centres including Elgin. This journey takes just twenty minutes and is operated by Stagecoach Monday to Saturday, with a reduced service on Sunday.
- 8.13 Although much of the parking provision is located on the main commercial streets, there is a small car park on Pitgavney Street (circa 8 spaces), where parking is free of charge.

#### Tourism

- 8.14 The findings of the Diversity of Uses survey found there are one hotel and four restaurants and cafes located within Lossiemouth town centre. There are also two caravan sites and several B&Bs located out with the centre. The wider area of Lossiemouth offers an array of attractions for tourists, including both West beach and East beach and a 18 hole golf course.

#### Lossiemouth Summary

- 8.15 There are few multiple retailers and independents predominate in Lossiemouth. In addition to retailing the centre is also a popular destination for tourists with number buildings offering tourist attractions including the Fishery Museum and The Warehouse Theatre on Pitgavney Quay. Convenience shopping needs are provided for by a number of smaller store units within the wider town centre. Otherwise the depth of goods on offer in the centre is somewhat limited. There are three national (Scottish/UK) multiples in the town out of a total of 36 retail goods/services – that is 8%. This figure is lower than the other towns in Moray.
- 8.16 The number of vacant units identified was six, which is a vacancy rate of 10.17% which is slightly above the average trend for Scotland.
- 8.17 In overall terms, Lossiemouth exhibits comparatively weak vitality and viability, compared to the larger towns in Moray.

## 9. Smaller Settlements Health Check

- 9.1 Limited health check assessments were carried out for Aberlour, Dufftown, Fochabers and Rothes. The following Vitality and Viability Indicators have been examined for these areas: Diversity of Uses; Retailer Representation; and Vacancy Rates

## Diversity of Uses

- 9.2 The overall mix of uses and the quantum of floor space is summarised in the table below along with the 2010 results. It is notable that Dufftown has 20 Leisure Service outlets (e.g. restaurants, cafes, hotels and guesthouses etc.), compared to eight in Aberlour, Fochabers and Rothes. This illustrates the importance of tourism to the centre.
- 9.3 Other than specialist stores the main-stream comparison retail range in these smaller settlements is very limited with few fashion retailers. 9.4 Convenience shopping needs are provided for by a number of smaller store units, such as the Co-operative stores in Aberlour, Dufftown and Fochabers. Rothes is serviced by a McColl's and Costcutter.
- 9.4 Given the scale of these settlements, they are well represented by Financial and Business Services (e.g. retail banks), with two retail banks located Aberlour, one in Dufftown and one in Fochabers. Rothes does not contain a financial institution.

*Table 28: Aberlour Diversity of Uses*

Summary of Aberlour Diversity of Uses Survey				
Type of Use	July 2012		July 2010	
	No. of Outlets	Floor space (sqm)	No. Of Outlets	Floor space (sqm)
Comparison	9	702	7	851
Convenience	4	647.4	5	507
Retail Service	5	1910.2	5	323.5
Leisure Service	8	572.9*	8	368
Financial & Business Service	3	404.2	2	233.4
Health & Medical	1		1	
Public Service	3		2	
Religious Service	1		1	
General Office Use	1		1	
Vacancy	1	No Data	0	0
<b>Total</b>	<b>36</b>	<b>4236.7</b>	<b>32</b>	<b>2282.9</b>

**Notes:**

\* No floor space data for 7 Broomfield Square. Also the Regional Assessor does not hold floor space data for Hotels and Public House premises.

*Table 29: Dufftown Diversity of Uses*

Summary of Dufftown Diversity of Uses Survey				
July 2012			July 2010	
Type of Use	No. of Outlets	Floor space (sqm)	No. Of Outlets	Floor space (sqm)
Comparison	8	330.5	8	297
Convenience	6	869.6	6	769
Retail Service	4	110.50*	3	87
Leisure Service	20	1730.3**	21	1898
Financial & Business Service	3	1416.9	2	180
Health & Medical	0		0	
Public Service	3		1	
Religious Service	0		0	
General Office Use	0		0	
Vacancy	4	111.3***	3	26
<b>Total</b>	<b>48</b>	<b>4569.1</b>	<b>44</b>	<b>3257</b>
<b>Notes:</b>				
* No floor space data for 29 Fife Street.				
** The Regional Assessor does not hold floor space data for Hotels and Public House premises.				
** *No floor space data for 10 Conval Street				

*Table 30: Fochabers Diversity of Uses*

Summary of Fochabers Diversity of Uses Survey				
July 2012			July 2010	
Type of Use	No. of Outlets	Floor space (sqm)	No. Of Outlets	Floor space (sqm)
Comparison	9	838.4	9	724

Convenience	4	631.1	6	725
Retail Service	3	125.7	3	118
Leisure Service	8	386.9*	7	118
Financial & Business Service	2	312.2	3	422
Health & Medical	2		2	
Public Service	2		3	
Religious Service	2		1	
General Office Use	2		0	
Vacancy	1	52.6	0	0
<b>Total</b>	<b>34</b>	<b>2346.9</b>	<b>34</b>	<b>2107</b>
<b>Notes:</b>				
* The Regional Assessor does not hold floor space data for Hotels and Public House premises.				

*Table 31: Rothes Diversity of Uses*

Summary of Rothes Diversity of Uses Survey				
Type of Use	July 2012		July 2010	
	No. of Outlets	Floor space (sqm)	No. Of Outlets	Floor space (sqm)
Comparison	3	241.2	2	61
Convenience	4	750.9	4	751
Retail Service	3	403.6	4	259
Leisure Service	8	104.8	8	104.8
Financial & Business Service	4	693.6	2	161
Health & Medical	1		0	
Public Service	4		3	
Religious Service	1		1	
General Office Use	0		0	
Vacancy	3	284	2	No Data
<b>Total</b>	<b>31</b>	<b>2478.1</b>	<b>26</b>	<b>1336.8</b>

## Retailer Representation

- 9.5 The overall number and percentage of national multiples (Scottish/UK) is summarised below. This relates to retail shops and services.

*Table 32: Smaller Settlements- Retailer Representation*

Town	Aberlour	Dufftown	Fochabers	Rothies
<b>Total Retail Goods Shops*</b>	18	18	14	10
<b>No. of National Multiples</b>	2 (11%)	3 (16.7%)	2 (14.3%)	3 (30%)

## Vacancy Rate

- 9.6 The overall number and percentage of vacant outlets identified in the centres of Aberlour, Dufftown, Fochabers and Rothies are set out overleaf. The number of vacant units in Rothies (surveyed July 2012) is four which is a vacancy rate of was 14.3%. This is above the current Scottish average of 10% however there has only been an increase of one unit since the 2010 survey. It is noteworthy, that there is only one vacant premise in both Aberlour and Fochabers, although this is an increase from 2010 when no vacancies were recorded. Dufftown has four vacant units which give a vacancy rate of 9.5% slightly below the current Scottish average of 10%. However, this is an increase of only one vacant unit since the 2010 survey.

*Table 33: Smaller Settlements- Vacancy Rates*

Town Centre	Total no. of Shops*	No. of Vacant Retail Outlets**	% of Vacant Outlets	Vacant Floor space (sqm)	Approximate Length of Vacant Retail Frontage (Meters)
<b>Aberlour</b>	27	1	3.7%	No Data	13
<b>Dufftown</b>	42	4	9.5%	111.3***	40
<b>Fochabers</b>	25	1	4.0%	52.6	7
<b>Rothies</b>	21	3	14.3%	284	24.9

### Notes:

**\*Total Shops:** This figure is compiled from the total number of Comparison; Convenience; Retail Service; and Leisure Service outlets within the town centre

**\*\* Vacant Retail Outlets:** Vacancies are measured for vacant Comparison; Convenience; Retail Service; and Leisure Service outlets only

**\*\*\*Estimate only-** missing data from Regional Assessor

## Smaller Settlements Summary

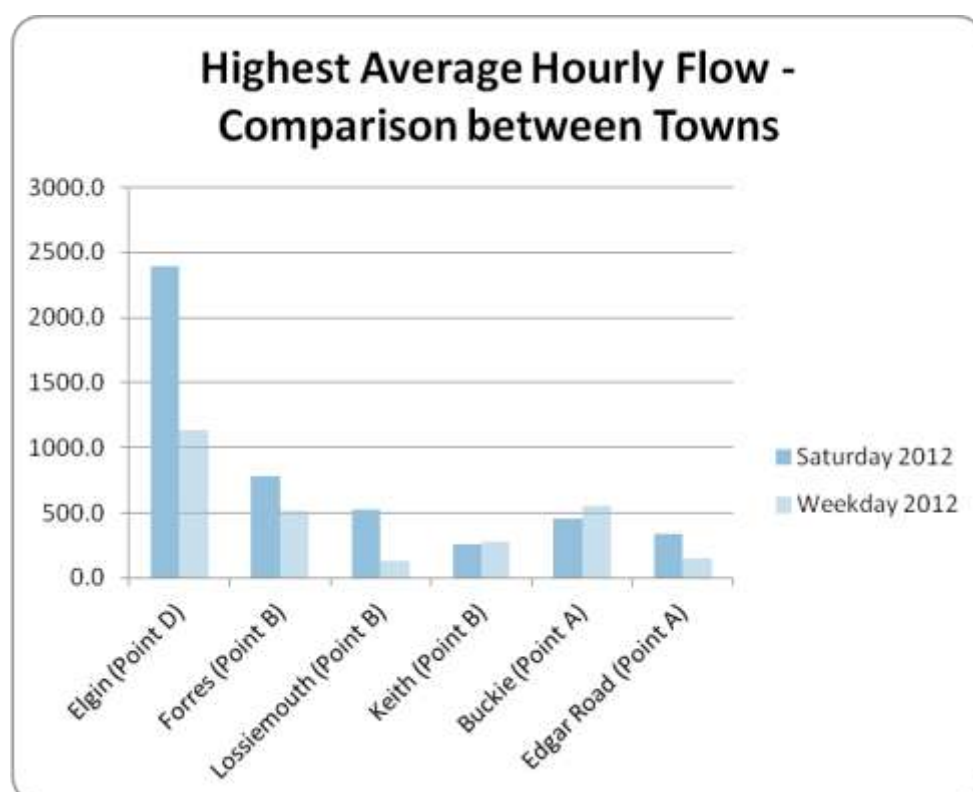
- 9.7 It is notable that Dufftown has 20 Leisure Service outlets (e.g. restaurants, cafes, hotels and guesthouses etc.) which illustrate the importance of tourism to the centre. Convenience shopping needs are provided for by a number of smaller store units, such as the Co-operative stores in Aberlour, Dufftown and Fochabers. Rothes is serviced by a McColls outlet. Given the scale of these settlements, they are well represented by Financial and Business Services (e.g. retail banks), with two retail banks located Aberlour, one in Dufftown and one in Fochabers. Rothes does not contain a financial institution.
- 9.8 The vacancy rate in Rothes was 14.3%, which is above the current Scottish average of 10%. It is noteworthy, that there was only one vacant premise in both Aberlour and Fochabers. Dufftown has a 9.5% vacancy rate which is below the current Scottish average of 10%.

## 10. Comparative Centres

### Pedestrian Footfall

- 10.1 *Chart 8* below, provides an overview of the average hourly flows for the busiest location on each of the town centres for both the weekday and Saturday counts.

*Chart 8: Pedestrian Footfall – Comparison between towns*



## Diversity of Uses

10.2 Table 34 below summarises the main uses within the centres of Elgin (including Edgar Road); Forres; Keith; Buckie; and Lossiemouth.

*Table 34: Diversity of Uses- Comparisons between Towns*

	Elgin		Edgar Road		Forres		Keith		Buckie		Lossiemouth	
Type of Use	No. of units	Floorspace (sqm)	No. of Units	Floorspace (sqm)	No. of Units	Floorspace (sqm)	No. of Units	Floorspace (sqm)	No. of Units	Floorspace (sqm)	No. of Units	Floorspace (sqm)
<b>Comparison</b>	94	27209	15	18046	32	3917	29	5309	35	6611	12	2561
<b>Convenience</b>	22	16008	2	12387	15	2390	12	1777	8	2289	12	594
<b>Retail Services</b>	46	7157	3	626	22	2449	10	956	17	1682	12	722
<b>Leisure Services*</b>	67	15631	1	269	23	1387	18	1011	19	2000	17	1579
<b>Financial &amp; Business Services</b>	49	8923	4	1753	21	4316	13	1546	17	2556	5	1054
<b>Vacancies</b>	25	5204	9	6375	10	3568	10	959*	4	333	6	774
<b>Total</b>	<b>303</b>	<b>80132</b>	<b>34</b>	<b>39456</b>	<b>123</b>	<b>18027</b>	<b>92</b>	<b>11558</b>	<b>100</b>	<b>15471</b>	<b>64</b>	<b>7284</b>
<b>Notes:</b>												
*The Regional Assessor does not hold floorspace data for certain leisure services (e.g. public houses, hotels and guesthouses).												

## Retail Representation

10.3 Table 35 below summarised in tabular format, the number and percentage of national multiples and charity shops in the centres of: Elgin (including Edgar Road); Forres; Keith; Buckie; and Lossiemouth.

*Table 35: Retailer Representation- Comparison between Towns*

Town	Elgin	Edgar Road	Forres	Keith	Buckie	Lossiemouth
<b>Total Retail Goods Shops*</b>	162	20	69	51	60	36
<b>No. of National</b>	50 (31%)	16(80%)	15 (21%)	7 (13.7%)	13 (21%)	3 (8%)



Multiples						
No. of Charity Shops	9 (5.5%)	0	6 (8.6%)	2 (3.9%)	3 (5%)	0 (0%)

## Vacancies

10.4 Table 36 below identifies the number and percentage of vacant units in the centre of: Elgin; Edgar Road; Forres; Keith; Buckie; and Lossiemouth.

*Table 36: Vacant Retail Units – Comparison between Towns*

Town Centre	Total no. of Shops*	No. of Vacant Retail Units**	% of Vacant Units	Vacant Floorspace (sqm)	Approximate Length of Vacant Retail Frontage (Meters)
Elgin	254	25	9.8%	5203***	133
Edgar Road	30	9	30%	6375	157
Forres	102	10	9.8%	3567	42
Keith	79	10	12.6%	958***	94.6
Buckie	83	4	4.8%	333	26
Lossiemouth	59	6	10.17%	744	73

**Notes:**

**\*Total Shops:** This figure is compiled from the total number of Comparison; Convenience; Retail Service; and Leisure Service outlets within the town centre

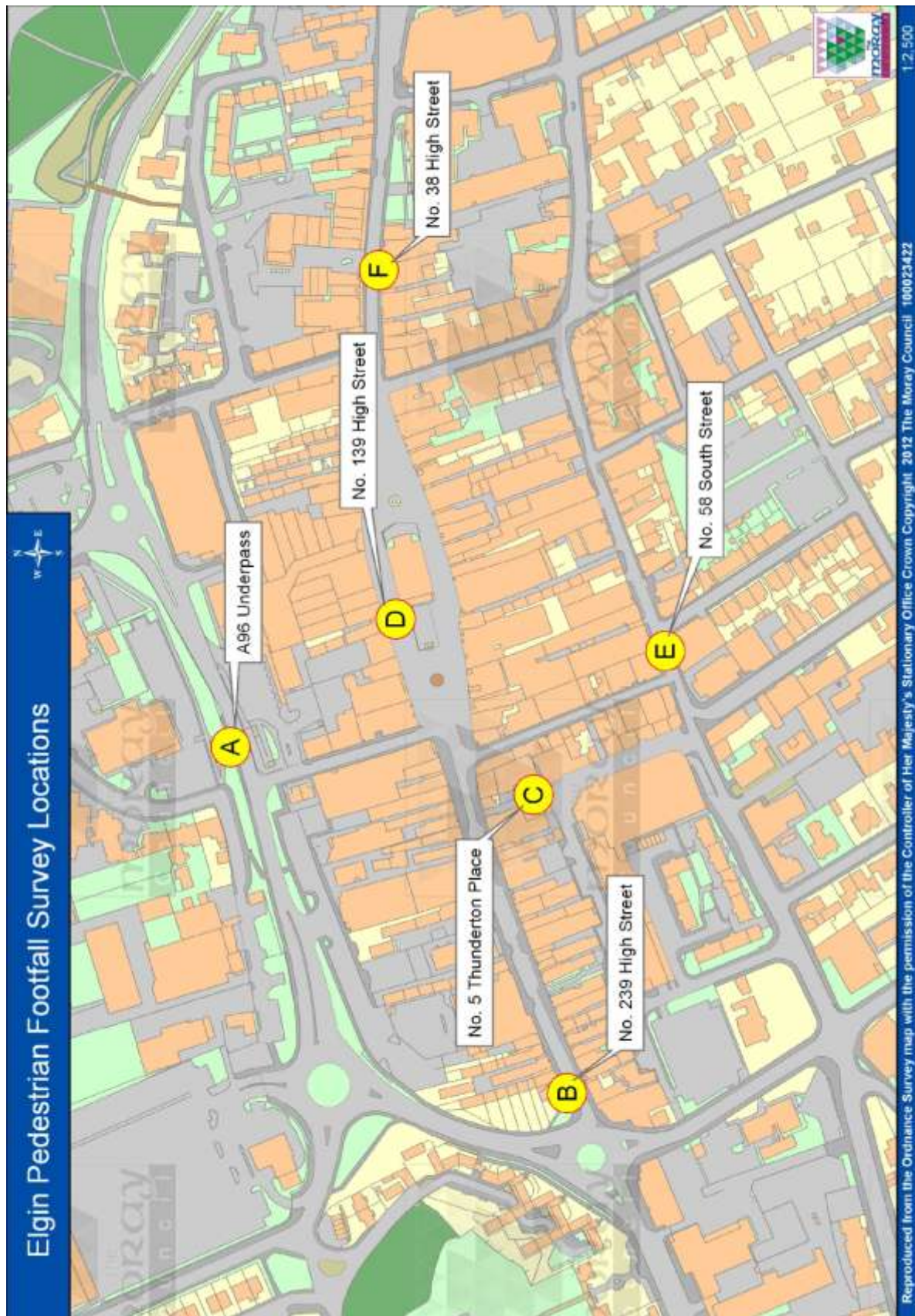
**\*\* Vacant Retail Outlets:** Vacancies are measured for vacant Comparison; Convenience; Retail Service; and Leisure Service outlets only

**\*\*\*Estimate only-** missing data from Regional Assessor

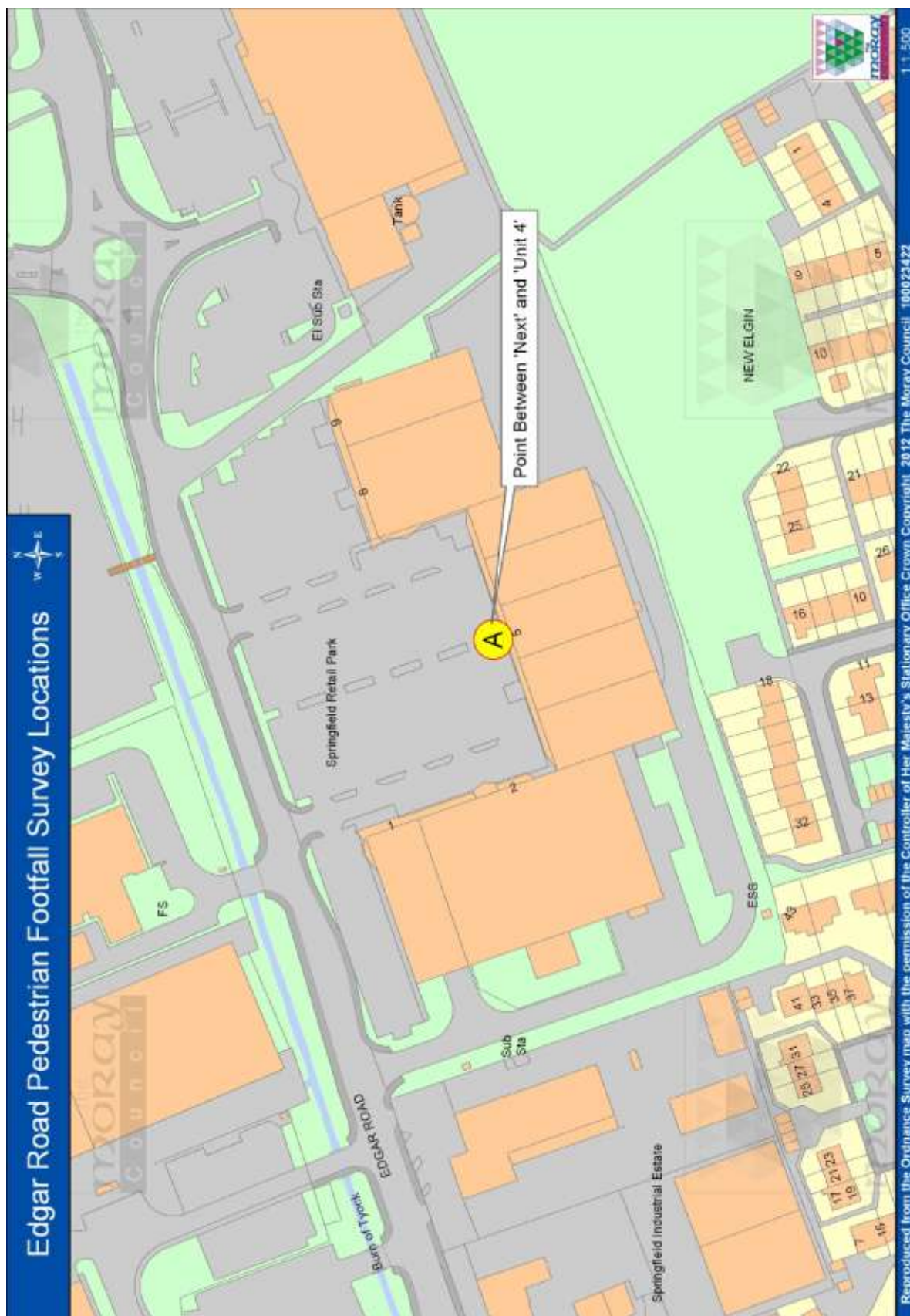
## Appendix I: Location of Key Centres



## Appendix II: Plans of Footfall Survey Locations



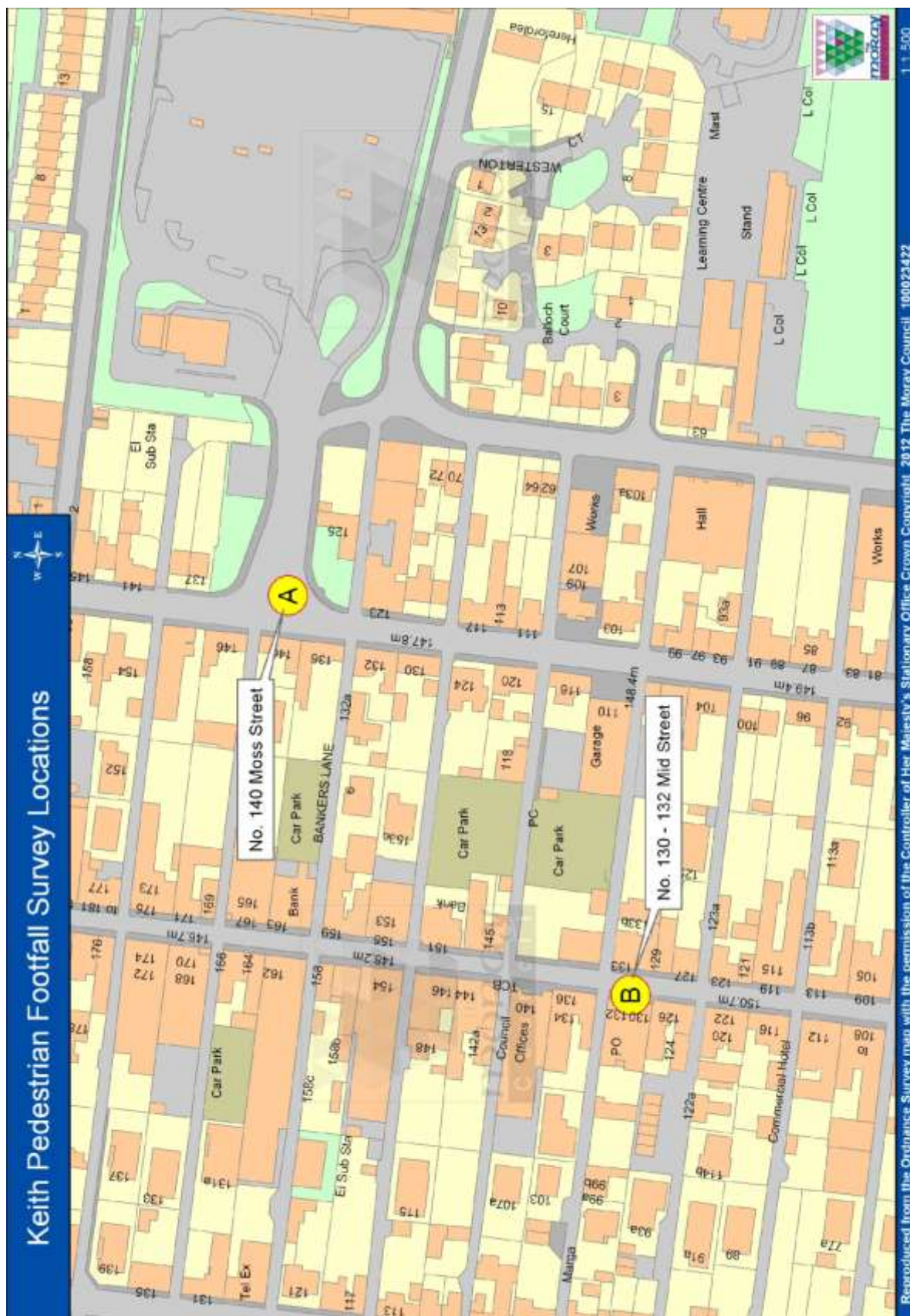




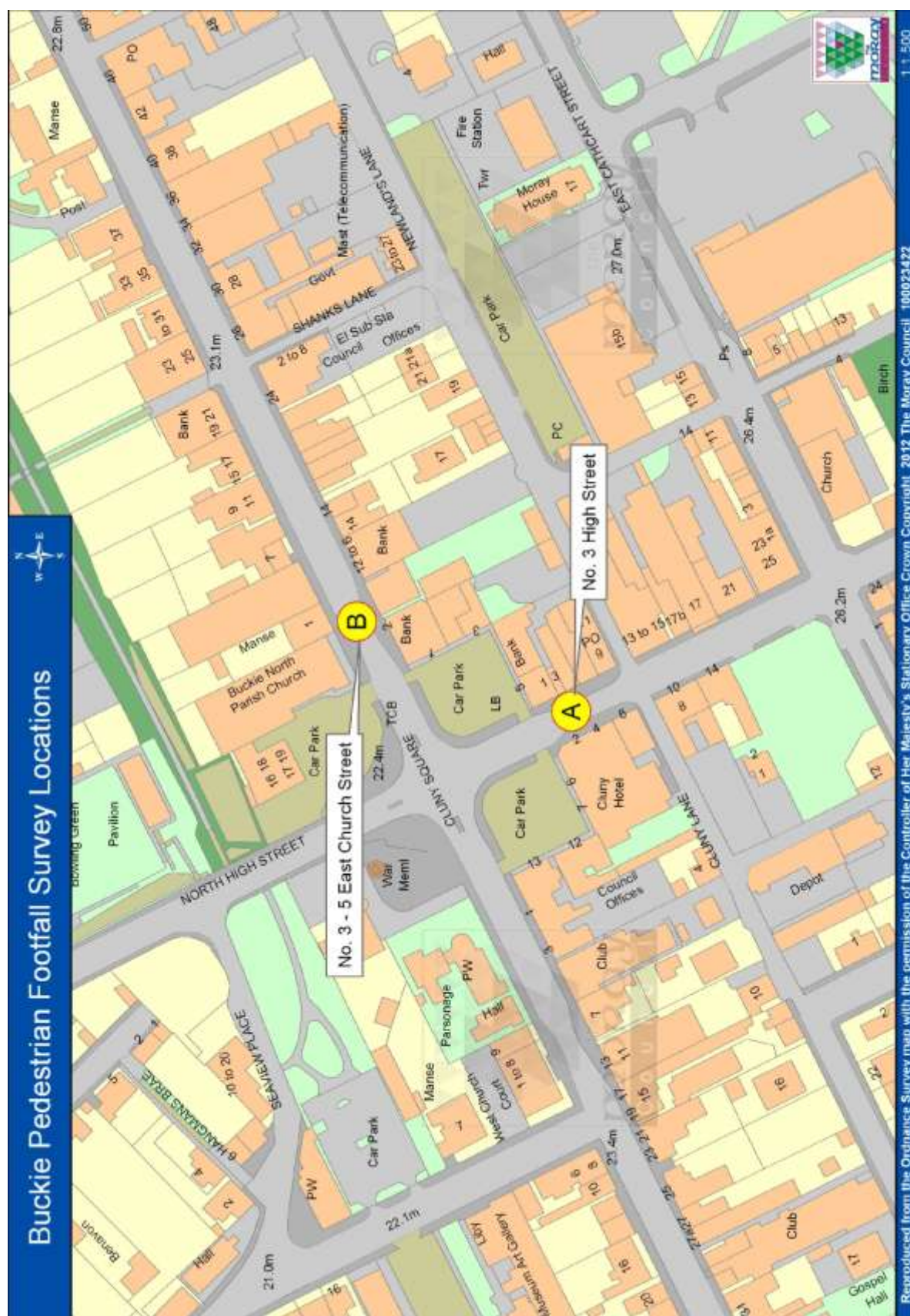




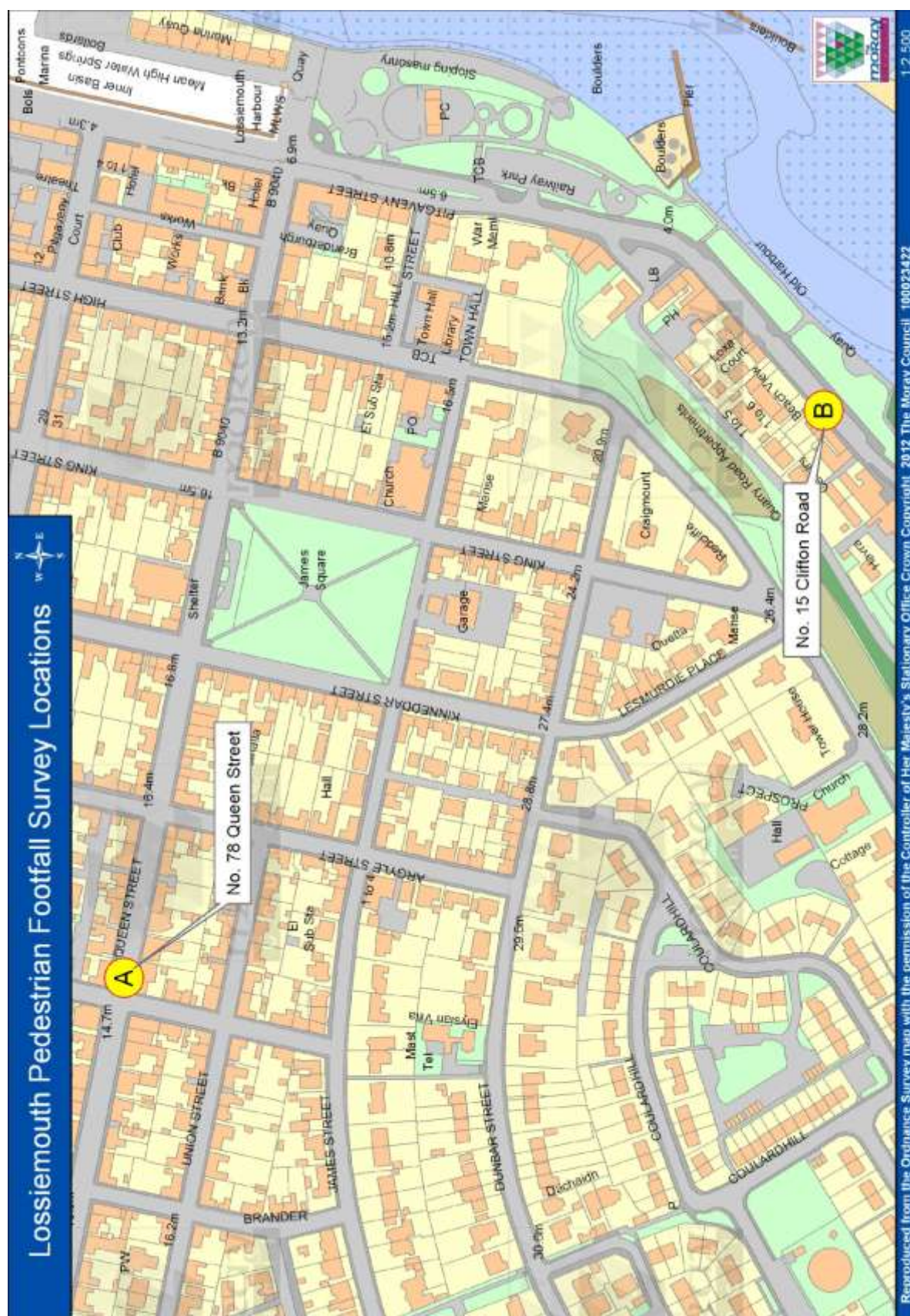














### Appendix III: GOAD Categories and Classifications

GOAD Class	GOAD Sub-Class	Primary Activity	Code
Retail	Comparison	Antiques shops	COM 1
Retail	Comparison	Art & Art dealers	COM 2
Retail	Comparison	Booksellers	COM 3
Retail	Comparison	Carpets and Flooring	COM 4
Retail	Comparison	Charity Shops	COM 5
Retail	Comparison	Chemists & Drugstores	COM 6
Retail	Comparison	Children's & Infants wear	COM 7
Retail	Comparison	Crafts, Gifts, China & Glass	COM 8
Retail	Comparison	Cycles & Accessories	COM 9
Retail	Comparison	Department and Variety Stores	COM 10
Retail	Comparison	DIY & Home Improvement	COM 11
Retail	Comparison	Electrical & Other Durable Goods	COM 12
Retail	Comparison	Florists	COM 13
Retail	Comparison	Footwear	COM 14
Retail	Comparison	Furniture	COM 15
Retail	Comparison	Gardens & Equipment	COM 16
Retail	Comparison	Greeting Cards	COM 17
Retail	Comparison	Hardware & Household Goods	COM 18
Retail	Comparison	Jewellery, Watches & Silver	COM 19
Retail	Comparison	Mixed Clothing	COM 20
Retail	Comparison	Ladies Wear & Accessories	COM 21
Retail	Comparison	Leather & Travel Goods	COM 22
Retail	Comparison	Men's Wear & Accessories	COM 23
Retail	Comparison	Music & Musical Instruments	COM 24
Retail	Comparison	Stationers	COM 25
Retail	Comparison	Office Supplies	COM 26
Retail	Comparison	Other Comparison Goods	COM 27
Retail	Comparison	Photographic	COM 28
Retail	Comparison	Second Hand Goods & Books	COM 29
Retail	Comparison	Sports, Camping & Leisure Goods	COM 30
Retail	Comparison	Telephones & Accessories	COM 31
Retail	Comparison	Textiles & Soft Furnishings	COM 32
Retail	Comparison	Toys, Games & Hobbies	COM 33
Retail	Comparison	Vehicle & Motorcycle Sales	COM 34
Retail	Comparison	Vehicle Accessories	COM 35
Retail	Comparison	Opticians	COM 36
Retail	Convenience	Bakers & Confectioners	CNV 1
Retail	Convenience	Butchers	CNV 2

<b>GOAD Class</b>	<b>GOAD Sub-Class</b>	<b>Primary Activity</b>	<b>Code</b>
Retail	Convenience	Convenience Store, Groceries & Frozen Food	CNV 3
Retail	Convenience	Delicatessen	CNV 4
Retail	Convenience	Fishmonger	CNV 5
Retail	Convenience	Health Foods	CNV 6
Retail	Convenience	Markets	CNV 7
Retail	Convenience	Off licence	CNV 8
Retail	Convenience	Shoe repairs etc	CNV 9
Retail	Convenience	Supermarkets	CNV 10
Retail	Convenience	Confectionery, Tobacconist, Newsagent	CNV 11
Retail	Retail Service	Clothing & Fancy Dress Hire	RS 1
Retail	Retail Service	Dry Cleaner & Laundrette	RS 2
Retail	Retail Service	Filling Stations & Garages	RS 3
Retail	Retail Service	Health & Beauty (e.g. beauticians, nail bars)	RS 4
Retail	Retail Service	Hairdressers/Barbers	RS 5
Retail	Retail Service	Other Retail Outlets	RS 7
Retail	Retail Service	Photo Processing	RS 8
Retail	Retail Service	Photo Studio	RS 9
Retail	Retail Service	Post Offices	RS 10
Retail	Retail Service	Repair, Alterations & Restoration	RS 11
Retail	Retail Service	Travel Agents	RS 12
Retail	Retail Service	Vehicle Rental	RS 13
Retail	Retail Service	Vehicle Repair & Services	RS 14
Retail	Other Retail	Shops	OR 1
Service	Leisure Services	Bars, Wine Bars & Public House	LS 1
Service	Leisure Services	Bingo & Amusement	LS 2
Service	Leisure Services	Cafes	LS 3
Service	Leisure Services	Casino & Betting Offices	LS 4
Service	Leisure Services	Cinemas, Theatres & Concert Halls	LS 5
Service	Leisure Services	Clubs	LS 6
Service	Leisure Services	Disco, Dance & Nightclub	LS 7
Service	Leisure Services	Fast Food & Takeaways	LS 8
Service	Leisure Services	Hotels & Guest Houses	LS 9
Service	Leisure Services	Restaurants	LS 10
Service	Leisure Services	Sports & Leisure Facilities	LS 11
Service	Financial & Business Services	Building Society	FBS 1
Service	Financial & Business	Building Supplies & Services	FBS 2
Service	Financial & Business Services	Business Goods & Services	FBS 3

<b>GOAD Class</b>	<b>GOAD Sub-Class</b>	<b>Primary Activity</b>	<b>Code</b>
Service	Financial & Business Services	Employment & Careers	FBS 4
Service	Financial & Business Services	Financial Services	FBS 5
Service	Financial & Business Services	Legal Services	FBS 6
Service	Financial & Business Services	Other Business Services	FBS 7
Service	Financial & Business Services	Printing & Copying	FBS 8
Service	Financial & Business Services	Property Services	FBS 9
Service	Financial & Business Services	Retail Banks	FBS 10
Service	Health & Medical Services	Chiropodist	HMS 1
Service	Health & Medical Services	Dental Surgery	HMS 2
Service	Health & Medical Services	Doctors Surgery	HMS 3
Service	Health & Medical Services	Health Centre	HMS 4
Service	Health & Medical Services	Nursing Home	HMS 5
Service	Health & Medical Services	Osteopath	HMS 6
Service	Health & Medical Services	Other Health & Medical Service	HMS 7
Service	Health & Medical Services	Rest home	HMS 8
Service	Health & Medical Services	Veterinary surgery	HMS 9
Service	Public Service	Advice Centre	PS 1
Service	Public Service	Community Centre	PS 2
Service	Public Service	Council Offices	PS 3
Service	Public Service	Educational Establishment	PS 4
Service	Public Service	Emergency Services	PS 5
Service	Public Service	Information Centre	PS 6
Service	Public Service	Kindergarten	PS 7
Service	Public Service	Library	PS 8
Service	Public Service	Museum & Art Gallery	PS 9
Service	Public Service	TA/Cadet Centre	PS 10
Service	Public Service	Tourist Information	PS 11
Service	Religious Service	Place of Worship	REL
Vacant	Vacant Retail	Vacant Shop	VAC 1