Moray Town Centre Health Check Assessment 2010

For further information, please contact:

Pamela Harty   Tel: 01343 563265, email: pamela.harty@moray.gov.uk

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Executive Summary

ES.1 In 2010, Moray Council undertook a series of Town Centre Health Checks assessments in Moray. On the instruction of Moray Council, Hargest Planning Ltd. and NEMS Market Surveys were commissioned to assist in the establishment of a Town Centre Health Check Framework. Hargest Planning Ltd., in conjunction with NEMS Market Surveys, were appointed to:

- Advise Moray Council Planning staff on the use of key Vitality and Viability Indicators (including information sources and application);
- Develop a strategic retail model for Moray;
- Identify the level of expenditure leakage from Moray; and
- Undertake a sample survey of Moray households and shoppers in order to identify current shopping patterns.

ES.2 Subsequently, Moray Council Planning staff undertook an assessment of the performance of the existing 'town centres' of Elgin (and also Edgar Road), Forres, Keith, Buckie and Lossiemouth, 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. Limited audits were also carried out for Aberlour, Dufftown, Fochabers and Rothes.

ES.3 The Town Centre Health Check (hereafter referred to as TCHC) provides a baseline of information which can be compared with future Health Check assessments of Moray's towns. The 2010 Moray TCHC will form part of an on-going programme of health check assessments, which are intended to be updated on a regular basis. TCHC data will:

- Provide an evidence base for use in other studies and strategies (e.g. The Elgin City Region for the Future project);
- Support the preparation and implementation of the local development plan and economic development policies; and
- Provide a baseline for assessing the impacts of proposed retail development proposals on the town centre.

ES.4 It is notable that 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.

ES.5 An overview of the TCHC assessments for each of the study areas is summarised briefly below.

Elgin Town Centre

ES.6 Elgin town centre is a healthy and attractive centre which plays an important role in the region. The town centre provides a good range of comparison and convenience retailing with a good mix of national multiple retailers and independent stores for a town of its size. 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. There are clear strengths within the centre. The Conservation Area and attractive built environment create a pleasing built realm for shoppers.

ES.7 The vacancy rate in Elgin accounts for 6.4% of the total number of Comparison, Convenience, Retail and Leisure Service units within the centre (see paragraph 3.24), and is below the current Scottish average of 10%. This is an indication of the relative health of the centre.

ES.8 Details on the rental values being achieved in Elgin have been collated through discussion with commercial agents. Prime zone 'A' rentals of £37 per sq ft are being achieved in the High Street main shopping area. Further evidence would suggest that rentals of £35 per sq ft are being experienced in other retail locations including Batchen Street and South Street. Benchmarking data obtained from *Aberdeenshire Long Term Retail Requirements Study 2009*, estimates that £35 per sq ft are being achieved for prime zone rents in Inverurie. This figure can be contrasted to £115 per sq ft prime zone A rents being achieved in Inverness and £163 per sq ft in Aberdeen.

ES.9 Spending generated by residents on convenience and comparison items in centres and stores in Moray represents retail turnover. Data has been obtained from a review of the strategic retail model, undertaken by Hargest Planning Ltd, as part of the wider health check study. Based on the information derived from the strategic retail model, turnover rates for retail goods businesses in the town centre appear to be healthy. It is estimated that the total turnover for all retail goods shops in the town centre is currently £106.99m: that is £47.97m for convenience shops (this is high reflecting the size of the Tesco superstore); £50.62m for general comparison; and £8.40m for bulky goods (e.g. furniture; floor coverings; household textiles; domestic appliances; hardware; DIY and decorator's supplies).

ES. 10 Based on information derived from the model, the figures for Special Forms of Trading (SFT) for Moray residents in 2010 amounted to a total figure of £27.31m. SFT includes each of the following: internet shopping; home delivery; purchases over the telephone; car boot sales; mobile shops etc. The total figure can be disaggregated as follows: Convenience £6.4m; General Comparison £14.94m; and Bulky Goods £5.97m.

ES. 11 Thus, the total available expenditure in Moray is broken down as follows: 6.5% is spent on SFT; 71.2% is spent in shops; and 22.3% is spent outwith Moray as expenditure leakage.

ES.12 As noted above in Paragraph ES.11, 22.3% (i.e. £93.88m) of the total available expenditure in Moray is spent outwith the area. The total figure can be disaggregated as follows: Convenience -£2.70m; General Comparison £74.64m; and Bulky Goods £21.93m. (Convenience leakage accounts for -2%. This means there is a marginal net inflow due to Asda drawing from the Highlands area and tourists exceeding leakage to Inverness[1]).

[1] Data obtained from previous Hargest Wallace Planning Ltd. and Asda Stores Ltd. 2007 study.

ES.13 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 appearance and attractiveness. Overall, Elgin is a vital and viable town centre by national standards.

Edgar Road Area of Elgin

ES.14 The Edgar Road area of Elgin provides a significant concentration of trading retail floorspace. It is notable that the area has 15 comparison goods retail units (18,432 sqm). Only a small proportion of units are for convenience goods but these include the Asda and Lidl stores and so, when one considers floorspace and turnover, convenience goods retailing comprises a significant proportion of the area's floorspace and turnover.

ES.15 The number of vacant units identified by Moray Council planning staff was 9, which is a vacancy rate of 50%. Elgin Retail Park has been developed, but only one unit is currently occupied by Matalan. Floorspace data obtained from previous planning application documents indicates that there is approximately 6,878 sqm (gross internal floor area) of vacant floorspace in the Edgar Road area.

ES.16 Based on the information in the retail model, it is estimated that the total turnover for all retail goods shops in the area is currently £86.52m. As noted above in paragraph ES.9, it is estimated that the total turnover for all retail goods shops in Elgin town centre is currently £106.99m.

Forres Town Centre

ES.17 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 and reasonable range of comparison goods shops, however, there is no town centre anchor store – Tesco and Lidl have developed out of centre. However, there is a Co-operative store located within the defined town centre boundary.

ES.18 The number of vacant units identified by Moray Council planning staff was 7, which is a vacancy rate of 8.2%- which is slightly below the average rate for Scotland.

ES.19 Based on the information in the retail model it is estimated that the total turnover for all retail goods shops in Forres town centre is currently £10.25m: that is £4.86 for convenience shops; £4.64m for general comparison; and £0.76m for bulky goods. Turnover rates are average for this type of centre. Overall, Forres is a relatively vital and viable town centre.

Keith Town Centre

ES.20 Keith town centre provides 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 study area[2] has 24 comparison goods retail units (4,949sqm); 11 convenience outlets (1,353 sqm); and 12 retail service units (722.5 sqm). There are 5 national (Scottish/UK) multiples in the town centre out of a total of 35 retail goods shops (retail services are excluded from this analysis) – that is 14%. This can be compared to 42% in Elgin town centre, 17% in Forres town centre and 26% in Buckie town centre.

ES.21 There are, however, some weaknesses in the centre. The number of vacant units identified by Moray Council planning staff was 6, which is a vacancy rate of 9.1%- higher than both Forres (8.2%) and Buckie (5.8%). Respondents to the Keith Business Survey commented that the proliferation of vacant buildings around the south end of Mid Street is a particular problem.

ES.22 According to the analysis of the strategic retail model, Keith town centre had an estimated annual retail goods turnover in the region of £9.6m in 2010. Of this total, £2.69m was derived from convenience shops; £5.02m for general comparison; and £1.89m for bulky goods. Turnover rates are close to average for this type of centre. The retail turnover figures stated above, excludes the Tesco store, which is located just outside the town centre boundary. Based on the information in the retail model, the estimated total turnover for the Tesco store is £10.93m (i.e. £8.87m convenience and £2.06m general comparison).

ES.23 In overall terms, the centre exhibits comparatively weaker signs of vitality and viability, than the town centres of Elgin, Forres and Buckie.

Buckie Town Centre

ES.24 The low level of vacancy and diverse retail offer in Buckie indicates that the town centre is performing well. It is notable that the area has 33 comparison goods retail units (4,873 sqm); 9 convenience outlets (3,685 sqm); and 14 retail service units (989 sqm). 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.

ES.25 The number of vacant units identified by Moray Council planning staff was 4, which is a vacancy rate of 5.8%- which is significantly lower than Keith (9.1%); Forres (8.2%); and Lossiemouth (13.3%).

ES.26 Based on the information in the strategic retail model, turnover rates are close to the average for type of centre. It is estimated that the total turnover for all retail goods shops in Buckie town centre is currently £17.47m: that is £9.53m for convenience shops; £6.56m for general comparison; and £1.36m for bulky goods.

ES.27 In overall terms, the centre exhibits generally good vitality and viability.

Lossiemouth Centre

ES.28 Lossiemouth does not contain a defined 'town centre', however a map of the study area can be found in Paragraph 8.7. There are few multiple retailers and

[2] Excludes Fife Keith town centre.

independents predominate in Lossiemouth. In addition to retailing the town is also a popular destination for tourists with certain buildings offering tourist attractions, including the Fishery Museum and 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. Most higher order comparison goods shopping trips are attracted to the larger centre of Elgin. There are 2 national (Scottish/UK) multiples in the town out of a total of 19 retail goods shops (retail services are excluded from this analysis) – that is 11%. This figure is significantly lower than the other towns in Moray.

ES.29 The number of vacant units identified by Moray Council planning staff was 6, which is a vacancy rate of 13.3%- which is above the average rate for Scotland.

ES.30 According to the analysis of the retail model, Lossiemouth centre had an estimated annual retail goods turnover in the region of £5.16m in 2010. Of this total, £2.46m was derived from convenience shops; £1.18m for general comparison; and £1.52m for bulky goods.

ES.31 In overall terms, Lossiemouth exhibits comparatively weak vitality and viability, compared to the larger towns in Moray.

Smaller Settlements

ES.32 Limited TCHC assessments were carried out for Aberlour, Dufftown, Fochabers and Rothes given their size and amount of information readily available on these centres.

ES.33 It is notable that Dufftown has 21 Leisure Service outlets (e.g. restaurants, cafes, hotels and guesthouses etc.), compared to 8 in Aberlour, 7 in Fochabers and 8 in Rothes. This illustrates 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, a small bakery and a butcher shop. Given the scale of these settlements, they are well represented by Financial Services (e.g. retail banks), with 2 retail banks located Aberlour, 1 in Dufftown and 2 in Fochabers. Rothes does not contain a financial institution.

ES.34 The vacancy rate in Rothes (surveyed July 2010) was 11.8%, which is above the current Scottish average of 10%. It is noteworthy, that there were no vacant premises in either Aberlour or Fochabers. Dufftown has a 7.9% vacancy rate which is below the current Scottish average.

1 Introduction

Study approach

1.1 This Paper provides an assessment of the existing town centre uses within Moray, focusing on the health of the main centres of Elgin, including Edgar Road, Forres, Keith, Buckie and Lossiemouth. It also provides an assessment of some other smaller centres, including Aberlour, Dufftown, Fochabers and Rothes– see Section 9. A plan showing the location of the key centres within the Study Area is included at Appendix I.

1.2 The Town Centre Health Check (TCHC) provides a baseline of information which can be compared with future Health Check assessments of Moray's towns. The 2010 Moray TCHC will form part of an on-going programme of health check assessments, which will be updated on a regular basis- (certain indicators, such as consumer surveys, will be updated every five years due to cost implications). TCHC data will:

- Provide an evidence base for use in other studies and strategies (e.g. The Elgin City Region for the Future project);
- Support the preparation and implementation of the local development plan and/or economic development policies; and
- Provide a baseline for assessing the impacts of proposed retail development proposals on the town centre.

1.3 The surveys undertaken and the development of a strategic retail model (developed from the consumer survey information) are directly applicable to other areas of work. It is notable that 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.

1.4 The Appendices comprise further details on town centre study areas, GOAD definitions, and pedestrian footfall survey locations. A supplementary 'Technical Appendix', containing consumer survey findings, is available separately. Please contact the Planning and Development section, for further details.

1.5 The principal information sources that we have used are as follows:

- Moray Council field surveys undertaken during July 2010;
- Regional Assessor information on floorspace, available at September 2010;
- Local estate agents for local market information;
- Valuation Office for information on rents and yields;
- Pedestrian Flow surveys undertaken by Moray Council staff in September and October 2010;
- Extensive householder, shopper and business surveys; and
- We have also drawn on material from previous health check assessments for the purpose of comparing the performance of Moray's town centres with competing centres such as Inverness, and Aberdeen.

Structure of the Report

1.6 Following this introduction, the report is structured as follows:

Section 2-	Methodology
Section 3-	Elgin Town Centre Health Check Assessment
Section 4-	Edgar Road Health Check Assessment
Section 5-	Forres Town Centre Health Check Assessment
Section 6-	Keith Town Centre Health Check Assessment
Section 7-	Buckie Town Centre Health Check Assessment
Section 8-	Lossiemouth Town Centre Health Check Assessment
Section 9-	Smaller Settlements' Health Check Assessment
Section 10-	Comparative Centres

2 Methodology

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 Paper 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.

Vitality & Viability Indicators

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 health check measures the strengths and weaknesses of a town centre and analyses the factors which contribute to its vitality and viability. A brief description of key Vitality and Viability Indicators assessed in this report are provided below in paragraphs 2.3 to 2.15.

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 comprises an analysis of the mix of uses within the centres and the quantum of floorspace they occupy. We have used floorspace data from the Regional Assessor 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 Retail and retail service **vacancy rates** can be defined as either the number of units or amount of vacant floorspace not in occupation, expressed as a percentage of the total number of retail units or floorspace in a centre. 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 will have on the appearance and feel of a centre, since this is what most shoppers in the centre will be aware of.

2.7 **Retailer intentions** can be defined as intentions of existing retailer to relocate/occupy more or less space in a centre and those of currently unrepresented retailers to take space in a town centre should appropriate units be available.

2.8 **Retail rents** are most frequently quoted as "prime Zone A" rents for town centres. Zone A rents reflect the established approach to the valuation of shops whereby the most valuable part of the shop is located at the front (generating greater sales) with values declining in other parts of units.

2.9 Commercial **yields** (typically "all risks yield") are a simple benchmark to assess the comparative attractiveness of different shopping centres. It is the ratio of rental income to capital value and is expressed in terms of the open market rent of a property as a percentage of capital value.

2.10 **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.

2.11 **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.

2.12 Information on **tourist** related activity was collected through indicators such as Diversity of Uses (for example identifying restaurants and key tourist facilities) and consumer survey information. Tourism and day-trippers can make an important contribution to the economy.

2.13 **Crime, safety and perceptions** of both are identified in SPP as indicators of vitality in a centre. The assessment of crime information is relevant to Health Check work, helping to identify any problem areas in a town centre and how these might best be addressed or influence improvements. For example issues relating to the evening economy, management and security in the town centre the role of residential accommodation in the town centre, environmental /access issues and the design of new development.

2.14 **Consumer surveys** provide a direct indication of the views of people who are most directly concerned with the future of the centre and are useful as a contribution to understanding the vitality and viability of a centre. Moray Council implemented a survey of town centre businesses to establish business linkages, business performance, investment intentions and employment issues. In undertaking the wider health check study, we have also commissioned NEMS Market Surveys to undertake the following surveys:

- A telephone survey of 1,000 households, to establish current patterns of shopping for various categories of convenience (food) and comparison (non-food) goods, including quantification of retail expenditure leakage outwith Moray and through special forms of trading; and
- A survey of 600 shoppers in Elgin, Forres, Keith, Buckie and Lossiemouth to identify strengths, weaknesses and suggestions for improvement in each centre.

2.15 Information on the **turnover** of centres provides a direct assessment of the commercial viability of a centre. Assessments of the existing catchment population and available expenditure provide an indicator of the centre’s commercial potential and a comparison of the two will indicate the extent to which a centre is effectively serving the market available.

3 Elgin Town Centre Health Check

Pedestrian Footfall

3.1 A pedestrian flow count was undertaken by Moray Council staff on Thursday 16th and Saturday 18th September 2010, 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

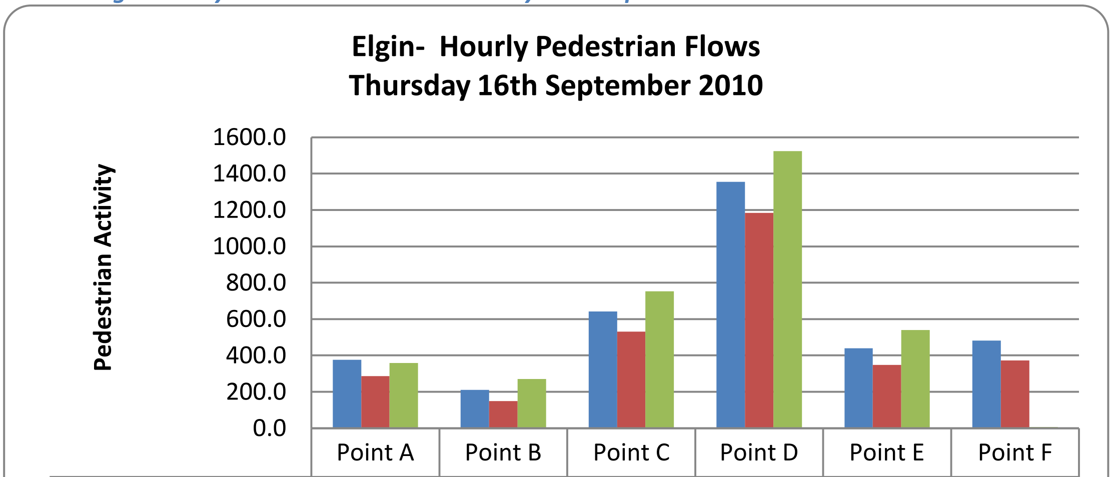
Enumeration Point	Location
A	A96 Underpass
B	West end of High Street (No. 239 High Street)
C	Thunderton Place (No. 5 Thunderton Place)
D	High Street (No. 139 High Street)
E	South Street (No. 58 South Street)
F	East end of High Street (No. 38 High Street)

3.2 Of the six locations, the position outside Boots in High Street (Point D) recorded the busiest footfall with an average hourly figure of 1,354 persons on the Thursday and 3,595 persons on the Saturday.

3.3 The lowest pedestrian flow count in the town centre was recorded at the western end of High Street (Point B) with an average hourly figure of 210 persons on the Thursday and 199.2 persons on the Saturday.

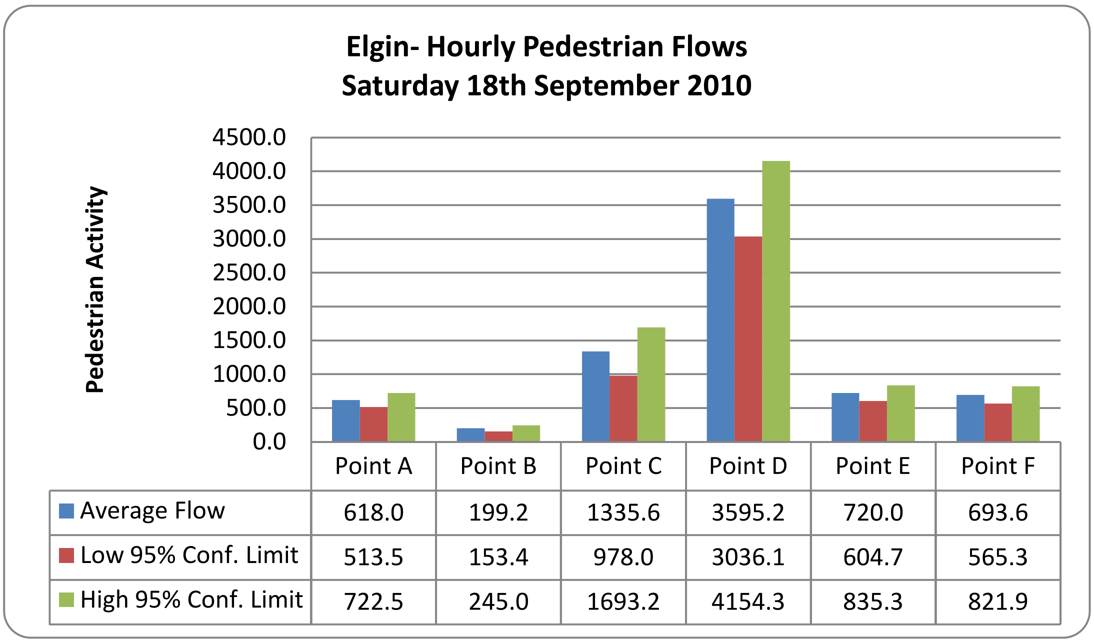
3.4 An overview of the average hourly flows (together with 95% confidence limits) recorded on both Thursday 16th and Saturday 18th September are illustrated in *Charts 1* and *2* below.

Chart 1: Elgin Hourly Pedestrian Flows- Thursday 16th September



	Point A	Point B	Point C	Point D	Point E	Point F
Average Flow	376.9	210.0	642.0	1354.0	440.0	481.2
Low 95% Conf. Limit	286.7	149.0	531.4	1184.8	347.9	372.0
High 95% Conf. Limit	359.2	271.0	752.6	1523.2	540.1	7.0

Chart 2: Elgin Hourly Pedestrian Flows- Saturday 18th September 2010



3.5 We can also look at the variation in pedestrian flows at different times of the day for the total enumeration period. Analysis of the Thursday count revealed that overall, 21.5% of the total flow occurs between 12.00 and 13.55[3], whilst 14.9% occurs after 15.00. This figure falls further to 14% after 16.00 hours. It is notable that there were occasional showers throughout the day, and temperatures were approximately 13 degrees Celsius. Further details of the Time of Day Analysis are illustrated in *Table 2* below.

Table 2: Elgin Footfall- Time of Day Analysis- Thursday 16th September 2010

	Enumeration Point	10.00-10.55	%	11.00-11.55	%	12.00-13.55	%	14.00-14.55	%	15.00-15.55	%	16.00-16.55	%
A	A96 Underpass	94	24.9	60	15.9	80	21.2	59	15.6	37	9.8	47	12.4
B	West end of High Street	32	18.2	26	14.8	40	22.7	27	15.3	17	9.7	33	18.8
C	Thunderton Place	63	11.8	78	14.6	121	22.6	76	14.2	109	20.4	88	16.4
D	High Street	179	13.2	284	21.0	275	20.3	227	16.8	189	14.0	200	14.8
E	South Street	51	13.8	54	14.6	92	24.9	59	15.9	73	19.7	41	11.1
F	East end of High Street	59	14.7	93	23.2	81	20.2	72	18.0	55	13.7	41	10.2
	Total	478	**14.9**	595	**18.5**	689	**21.5**	520	**16.2**	480	**14.9**	450	**14.0**

[3] 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.

3.6 Analysis of the Saturday count revealed that overall 23% of the total flow occurs between 14.00 and 14.55. Similar to the Thursday count, footfall dropped to 13.5% during the period 16.00 to 16.55. Weather conditions were more favourable than the weekday count, and temperatures were approximately 15 degrees Celsius. It should be noted that during the survey, the Farmers' Market was taking place on the Plainstones, which is likely to have increased footfall in this area. Further details of the Time of Day Analysis recorded on Saturday 18th September are illustrated in *Table 3* below.

Table 3: Elgin Footfall- Time of Day Analysis- Saturday 18th September 2010

	Enumeration Point	10.00-10.55	%	11.00-11.55	%	12.00-13.55	%	14.00-14.55	%	15.00-15.55	%	16.00-16.55	%
A	A96 Underpass	55	10.7	111	21.6	92	17.9	99	19.2	85	16.5	73	14.2
B	West end of High Street	16	9.6	22	13.3	24	14.5	43	25.9	21	12.7	40	24.1
C	Thunderton Place	71	6.4	124	11.1	202	18.1	327	29.4	249	22.4	140	12.6
D	High Street	341	11.4	527	17.6	542	18.1	653	21.8	532	17.8	401	13.4
E	South Street	80	13.3	108	169.7	112	18.7	134	22.3	93	15.5	73	12.2
F	East end of High Street	83	14.4	97	16.8	130	22.5	114	19.7	77	13.3	77	13.3
	Total	646	**10.8**	989	**16.6**	1102	**18.5**	1370	**23.0**	1057	**17.7**	804	**13.5**

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, as defined in the *Moray Local Plan 2008*. Elgin town centre accommodates a range of retail facilities that are discussed in detail below. In addition to retailing, the centre also has a wide range of non-retail facilities and activities, including tourist attractions such as Elgin Museum on High Street. Of particular significance, and religious and tourist importance, is St. Giles Church with its prominent position on High Street.

3.8 Further information on the retail mix is set out below but it is notable that the town centre has 236 no. Retail, Retail Service and Leisure Service businesses within the town centre boundary. *Table 4* below demonstrates that the dominant uses within Elgin town centre are comparison shops and services. There are 98 Comparison goods retail units (e.g. clothing; footwear; electrical good etc.) and a further 44 units are classified as Retail Services (e.g. hairdressers, beauticians, travel agents). Only a small proportion of units are for Convenience goods (e.g. supermarkets; grocery stores etc.) but these include the Tesco superstore and so, when one considers floorspace and turnover, convenience goods retailing comprises a significant proportion of the town centre floorspace and turnover.

3.9 All categories of retail goods shops identified by GOAD reports (Experian Ltd.) are present within the town centre – although in some cases choice of retail goods shops is limited (e.g. motor accessories and variety/catalogue stores).

3.10 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. There is a good spread of Retail Service uses (e.g. hairdressers, beauticians, travel agents) throughout the centre which contributes to a varied street scene and encourages footfall around the centre. Amongst the most dispersed service uses are hair and beauty units which can be found on most streets within the centre. Whilst there are some notable and prominent ground level units, such as the LCTG on Batchen Street (106 sq m), grouping of such uses tends to occur within smaller and upper floor units.

3.11 To the north-east of the town centre there are extensive areas of public open space and parkland, and the pedestrianised High Street also provides a significant area of open space in the heart of the town centre. 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.

3.12 The overall mix of uses and the quantum of floorspace they occupy is summarised in the table below.

Table 4: Elgin- Diversity of Uses

Summary of Elgin Diversity of Uses Survey (July 2010)

Type of Use	No. of Outlets	Floor space (sqm)
Comparison	98	22296
Convenience	24	17471
Retail Service	44	4676
Leisure Service	70	16419*
Financial & Business Service	46	6564
Health & Medical	9	1237
Public Service	6	17350**
Religious Service	4	2743
General Office Use	45	7563
Vacancy	15	2722
Total	**361**	**99,041**

Notes:
*The Regional Assessor does not hold floor space data for Hotels and Public House premises
** Figure includes the former Supermarket building (3111 sqm) which is not yet occupied by Moray Council- building currently under renovation.

3.13 It should be noted that the categories used, are those based on the classifications provided by GOAD Experian Ltd., as recommended by the '*Town Centres Retailing and Methodologies'* paper published by Scottish Government in December 2007. A table summarising the principal GOAD categories and classifications used in this study can be found in Appendix III.

3.14 Benchmarking data, obtained from previous Hargest Planning Ltd studies, is set out below in *Table 5*. It is notable that there are 208 comparison and 34 convenience retail outlets in Inverness centre, compared to 98 comparison goods retail units and a further 24 convenience retail units in Elgin town centre. In this instance, Elgin is most comparable with St. Andrews- with 102 comparison and 20 convenience units. Note 'Retail Services' here includes all retail services plus financial services and leisure services (but does not include bars and pubs and other uses that are not Class 1 uses) - i.e. slight difference in definitions from those used in the Moray TCHC survey.

Table 5: Diversity of Uses- Benchmarking Data

		Inverness	Aberdeen	Inverurie	Peterhead	St Andrews
No of retail units	Convenience	34	74	12	12	20
	Comparison	208	397	58	66	102
	Retail services*	121	308	37	49	60
	Vacant	55	65	6	23	5
	Total	***418***	***844***	***113***	***150***	***187***
	Vacant %	13%	8%	5%	15%	3%
Floor area (GFA sq m)	Convenience	12980	18882	6372	1781	3078
	Comparison	56450	140708	13039	12586	16891
	Retail services*	16010	64974	6497	5514	n/a
	Vacant	14660	24403	3210	2661	n/a
	Total	***100100***	***248967***	***29118***	***22542***	***19969***
	Vacant %	15%	10%	11%	12%	Data Unavailable
Data Source		Highland Council	Hargest Wallace Planning Ltd./ Aberdeen City Council	Hargest Wallace Planning Ltd./ Aberdeenshire Council	Hargest Wallace Planning Ltd./ Aberdeenshire Council	Hargest Wallace Planning Ltd./ Fife Council

3.15 A range of consumer surveys were conducted as part of this study, including Business, Household and Shopper surveys. Respondents were asked a range of questions relating to the range of retail and other services provided in Elgin town centre, the results of which are set out overleaf. A supplementary 'Technical Appendix', containing consumer survey findings, is available separately. Please contact the Planning and Development section, for further details.

Table 6: Elgin- Diversity of Uses- Survey Responses

Question	Business Survey	Householder Survey	Shopper Survey
Range of shopping	Poor	Adequate	Adequate
Range of other services for personal business (e.g. banks, building societies, estate and travel agents)	Good	Good	Adequate
Provision of other facilities and services (e.g. Council services, leisure or sports facilities)	Adequate	Adequate	Good
Range of places for entertainment (e.g. including eating out/ cinema etc.)	Poor	Adequate	Adequate

Retailer Representation

3.16 There are a number of national multiple retailers located within Elgin, including Marks & Spencer, WH Smiths and M&Co. Site surveys revealed 49 national (Scottish/UK) multiples in the town centre out of a total of 118 retail goods shops (retail services are excluded from this analysis) – that is 42%. This figure is similar to other centres that serve a sub-regional function (e.g. 48% of Inverness's retail goods shops are currently multiples). In contrast, the national multiple retailer representation in Inverurie and Peterhead is 26% and 22% respectively[4].

3.17 Although most of Elgin town centre's retail provision is located within the historic streets, there is one shopping centre within the retail core. The St. Giles Centre accommodates 6,389 sq m (net) in 26 units, in addition to 283 car parking spaces. The St. Giles Centre is currently occupied by a variety of national retailers including a Monsoon outlet (282.1 sq m) as well as several smaller independent units such as Witkowski Jewellers (48.2 sq m). The 308.5 sq m former Evans unit and the 82.5 sq m former Moray Mobility unit are currently the only vacant stores in the complex.

3.18 Within the defined town boundary there are a number of foodstores, the largest of which are the 9,887.8 sq m (net) Tesco on Blackfriars Road and the 1,559 sq m Marks & Spencer's store on High Street. These units, alongside the further convenience retailing provided by the Aldi store (1,150.9 sq m net), ensures that the amount of convenience floorspace and range of goods offered is good. It is notable that both Tesco and M&S have a substantial portion of floorspace for comparison goods as well as convenience. In *Table 4* above, this has all been classed as 'Convenience' floorspace, whereas the retail model disaggregates this space in these (and other) retail units.

3.19 The Tesco store provides a wide range of convenience and comparison goods within a store that also includes a cafe, a telecoms counter, a petrol station and a photo-processing facility. It is located within walking distance to the bus station and

[4] Data obtained from sources outlined in Table 5.

provides a destination shopping facility at the north western end area of the town centre. The store has circa 28 checkouts and parking provision for 474 cars.

3.20 10 (8%) units in the town centre were identified to be charity shops – this can be compared to both 6% in Forres and Keith and 7% in Buckie

3.21 In addition to the multiple retailers, the town centre has a good provision of independent/specialist retailers. South Street, which runs parallel to High Street, accommodates a collection of independent stores in small retail units providing a more bespoke range of services than the national multiples elsewhere in the centre. The independent sector has been commented upon by others (including those consulted in this study through the consumer surveys) as being a strength of the town centre.

3.22 As expected with a 'County town', there is also a significant presence of financial and property services in the town. A concentration of such services is found on the eastern end of High Street and Commerce Street. Unlike the retail core, where upper floors are largely occupied by storage and ancillary space, the upper floors of the buildings in the South Street area are dominated by offices, the majority of which correspond to the ground floor commercial frontage.

Vacancy Rate

3.23 Town centres are constantly evolving and vacant units provide opportunities for retailers to locate in such centres and add to the diversity of retailer representation. Vacant units are therefore not necessarily a sign of stagnation or weakness; they are a function of the economic cycle within all retail centres.

3.24 A site survey by Moray Council planning staff during July 2010, confirmed the number of vacant units stood at 15[5], as illustrated above in *Table 4.* The vacancy rate accounts for 6.4% 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. Floorspace data obtained from the Regional Assessor indicates that there is approximately 2,722 sq m of vacant floorspace with Elgin town centre[6]. There is approximately 97 m of vacant retail frontage in the town centre (figure obtained by scaling off OS-base plans). This figure equate to approximately 6.7% 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 indicator of the impact that vacancies have on the appearance and feel of Elgin centre, since this is what most shoppers in the centre will be aware of.

[5] It should be noted that vacancies are measured for vacant Comparison; Convenience; Retail Service; and Leisure Service outlets only.

[6] This figure does not include the former Safeway building (3,111 sq m) which is currently under refurbishment by The Moray Council.

Retailer Intentions

3.25 A survey of town centre retailers was implemented by Moray Council, to ascertain the intentions of existing retailers to relocate/ occupy more or less space in the town centre over the next five years. There was 16% response rate to the Elgin Business Survey.

3.26 Respondents were asked to indicate their intention to maintain their business in the town centre over the next five years. Over three-quarters (78%) of the respondents to the Elgin Business Survey indicated that they intended to maintain their business in Elgin town centre over the next five years.

3.27 Respondents were asked to estimate how they expected their business turnover to change in the next three years. Analysis of the results suggests that retailers are forecasting a 4.3% decline in turnover over the next three years.

3.28 Analysis of the survey responses found that 39% of respondents intend to invest in their business over the next 5 years, with the level of investment ranging from £5,000 to £100,000.

3.29 The survey also asked respondents how they expected to invest in their business, in an attempt to enhance understanding about the intentions of existing retailers located with the town centre. Respondents indicated that they expected to invest in their businesses in the following ways:

- Make substantial equipment improvements;
- Refurbish premises;
- Building & improvement;
- Invest in training & introduce more services & exclusive products;
- Invest in new vehicles; and
- Improve shop frontages.

3.30 A majority of respondents (74%) indicated that they were not looking for new premises within the town centre, however, of this figure, 13% suggested that they were looking for new premises outwith the town centre. Their reasons for looking for new premises include the following:

- *"Looking to purchase in a nice area, that doesn't look as run down";*
- *"Looking for a premise that has free/better parking which would encourage more customers to visit my shop".*

3.31 Discussions with commercial agents operating in the area indicate that occupier demand for retail premises in most locations throughout Scotland remains subdued. Development activity is curtailed by the lack of debt finance available within the property market. Consumer confidence in Scotland is considered to be lower than the rest of the UK, with concerns that public sector job cuts in Scotland may lead shoppers and consumers to be more cautious about spending. Occupier demand for the comparison retail sector is mainly latent in Elgin. Ryden LLP has recently secured a letting for 77 High Street for a discount store (795 sq ft net internal ground floor area), where rental offers in the region of £30,000 per annum were sought.

3.32 The convenience sector shows some resilience during otherwise challenging times for the wider retail sector. Sainsbury's have submitted a Proposal of Application Notice for the Auction Mart site on Linkwood Road (designated as 'OPP6' in *Moray Local Plan 2008*), for the development of supermarket and filling station. The application is anticipated to be submitted shortly. Discussions with commercial agents also indicated that Home Bargains are actively seeking a suitable premise within the wider town area.

Rent and Yield

3.33 Retail rents are most frequently quoted as "prime Zone A" rents for town centres. Zone A rents reflect the established approach to the valuation of shops whereby the most valuable part of the shop is located at the front (generating greater sales) with values declining in other parts of units.

3.34 Details on the rental values being achieved in Elgin have been collated through discussion with commercial agents. Prime zone 'A' rentals of £37 per sq ft are being achieved in the High Street main shopping area. Further rental evidence would suggest that rentals of £35 per sq ft are being experienced in other retail locations including Batchen Street and South Street. Benchmarking data obtained from *Aberdeenshire Long Term Retail Requirements Study 2009*, estimates that £35 per sq ft are being achieved for prime zone rents in Inverurie. This figure can be contrasted to £115 per sq ft prime zone A rents being achieved in Inverness and £163 per sq ft in Aberdeen.

3.35 Commercial yields (typically "all risks yield") are a simple benchmark to assess the comparative attractiveness of different shopping centres. It is the ratio of rental income to capital value and is expressed in terms of the open market rent of a property as a percentage of capital value. It is important to note that a low yield is indicative of greater market confidence (i.e. lower risk) whereas a high yield indicates less confidence (i.e. high risk).

3.36 Details on the retail yield values being achieved in Elgin have been collated through discussion with commercial agents. In the absence of significant transaction information, agents estimate that yield values for the key retail units on High Street range from 8.5% to 10%. Retail yield for units in more periphery parts of the town centre are estimated to range from 10% to 15%. In July 2008, the Valuation Office estimated that retail yield in Elgin was 8.25%. *Table 7* overleaf sets out the reported yields for the centres of Inverness, Aberdeen, Dumfries and St. Andrews, in April 2007 and 2009.

Table 7: Yield Data

	Inverness	Aberdeen	Dumfries	St. Andrews
2007	6.25%	5.25%	>10%	8.00%
2009	8.00%	7.00%	8.50%	Data Unavailable
Data Source	Highland Council	Hargest Wallace Planning Ltd./ Aberdeen City Council	Hargest Wallace Planning Ltd.	Hargest Wallace Planning Ltd./ Fife Council

Turnover

3.37 The level and growth of turnover in town centres are important indicators of town centre health. Based on the information in the retail model, turnover rates for retail goods businesses in the town centre appear to be healthy. It is estimated that the total turnover for all retail goods shops in the town centre is currently £106.99m: that is £47.97m for convenience shops (this is high reflecting the size of the Tesco superstore); £50.62m for general comparison; and £8.4m for bulky goods. A summary of turnover data for comparable town centres in Scotland, obtained from Hargest Planning Ltd., is provided below in *Table 8.*

Table 8: Turnover- Benchmarking Data

	Inverness	Aberdeen	Inverurie	Peterhead	St. Andrews
Convenience Turnover	67.50	55.96	40.71	3.48	14.40
Comparison Turnover	217.00	576.33	27.93	30.05	39.20
Total Turnover	***284.50***	***632.29***	***68.64***	***33.53***	***53.60***
Data Source	Highland Council	Hargest Wallace Planning Ltd./ Aberdeen City Council	Hargest Wallace Planning Ltd./ Aberdeenshire Council	Hargest Wallace Planning Ltd./ Aberdeenshire Council	Hargest Wallace Planning Ltd./ Fife Council

3.38 Based on the information in the retail model, it is estimated that the total net expenditure leakage for all retail shops in Moray is 22.3%. Convenience leakage accounts for -2%. This means there is a marginal net inflow due to Asda drawing from the Highlands area and tourists exceeding leakage to Inverness[7]. The development of a Sainsbury's at Nairn will reduce this figure close to 0%. The retail model suggests there is substantial general comparison leakage (43%), especially to Inverness and also Aberdeen. Likewise, the model demonstrates that there is also significant 'bulky goods' leakage (31%), primarily to retail parks in Inverness and Aberdeen.

3.39 The strategic retail model also quantifies the amount of expenditure leakage through Special Forms of Trading (SFT). SFT includes each of the following: internet shopping; home delivery; purchases over the telephone; car boot sales; mobile shops etc. The retail model applied national forecasts of SFT to Moray. Answers to questions on SFT in the household survey indicated levels comparable to those estimated for the UK

[7] Data obtained from previous Hargest Wallace Planning Ltd. and Asda Stores Ltd. 2007 study.

as a whole. Based on information derived from the model, the figures for SFT for Moray residents in 2010 amounted to a total figure of £27.31m. The total figure can be disaggregated as follows: Convenience - £6.4m; General Comparison - £14.94m; and Bulky Goods - £5.97m.

3.40 Thus, the total available expenditure in Moray is broken down as follows: 6.5% is spent on SFT; 71.2% is spent in shops; and 22.3% is spent outwith Moray as expenditure leakage.

Accessibility

3.41 The east/west alignment of the A96 is paralleled by the Aberdeen to Inverness rail line which serves Elgin. The road infrastructure, particularly the northern inner relief road, has created severance between the town centre core and key neighbourhoods and landscape amenity spaces, as commented upon by respondents of the Elgin Business Survey. Furthermore, 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.

3.42 Elgin bus station is located on Alexandra Road, adjacent to the St. Giles Centre. As Moray is a predominantly low density, rural area, normal bus services are often not commercially viable. Rural isolation, coupled with a low wage economy, are major factors in exacerbating social exclusion. 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 (*Draft Local Transport Strategy*, April 2010). *Map 1* overleaf, illustrates the public transport provision available in Elgin.

Map 1: Elgin Public Transport (Source: Aberdeenshire & Moray Public Transport Guide 2010)

3.43 According to the '*Elgin Traffic Review*' report completed by Jacobs Consultancy in November 2009, the high traffic volumes in Elgin are due to a combination of local and strategic traffic. The proportion of traffic on the A96 and A941 travelling to, from or within Elgin is significantly greater than through-traffic. This indicates that Elgin is an origin or destination for a large proportion of traffic in the area. Sections of the A96 in Elgin town centre with flow ranges between 15,000 vehicles per day (vpd) and 18,000 vpd are observed to have a high traffic contribution from local collector and distributor roads feeding into the trunk road.

3.44 There are number of both Council and private operated car parks within the town centre, with car parking charged at £1 per hour for short term parking, or £4 for 4 to 10 hours parking. There is also extensive on-street parking within the town centre.

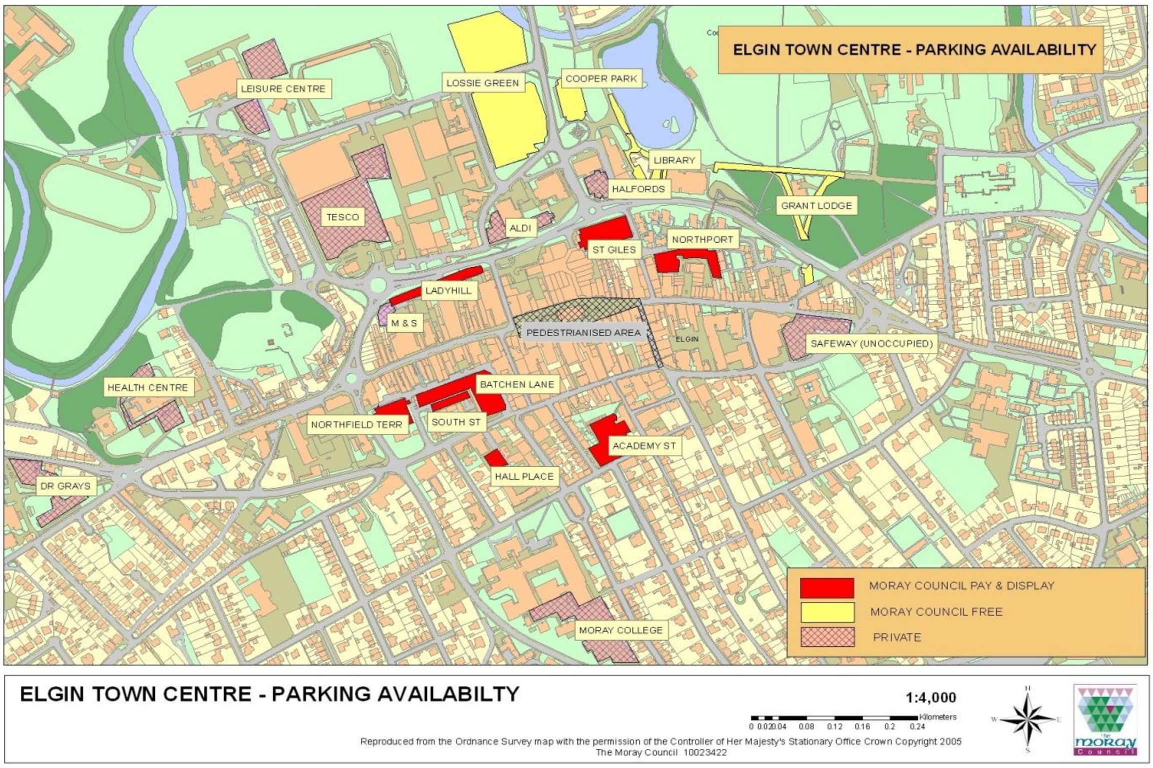
Table 9 below, summarises the Council operated car parking provision in the town centre.

Table 9: No. of Public Car Parking Spaces in Elgin

	No. of Spaces (surveyed 16/09/2010)								
Car Park	**Car**	**Disabled**	**Parent & Child**	**M/C**	**Bus**	**Taxi**	**Lorry**	**Cycle**	**Pay & Display**
Batchen Lane	209	6	7	1					Mon-Sat
Hall Place	28	1							Mon- Sat
Greyfriars Street	63	3							Sat
Ladyhill Road	40	3		1					Mon- Sat
Lossie Green	349	7		9			13	3	Mon- Sat
Lossie Wynd	78	2							Mon- Sat
Moray Street	102	3		1					Mon- Sat
Moray Street (office)	5	2							Sat
Northfield Terrace	74	2							Mon- Sat
North Port	88	10							Mon- Sat
South Street	18	1							Mon- Sat
St. Giles Road	270	13							Mon- Sat

3.45 A map-based view of the car parking provision of Elgin is displayed below in *Map 2*.

Map 2: Elgin Town Centre- Parking Availability



3.46 Respondents to the consumer surveys were asked to rate car parking provision; cost of parking; ease of travel by public transport and ease of travel by private car in Elgin town centre. The results of the surveys are set out below.

Table 10: Elgin- Accessibility- Survey Responses

Question	Business Survey	Householder Survey	Shopper Survey
Car Parking Provision	Adequate	Adequate	Good
Cost of Car Parking	Poor	Adequate	Good
Ease of Travel by Public Transport	Adequate	Good	Good
Ease of Travel by Private Car	Adequate	Good	Good

Environmental Quality

3.47 The visual character of Elgin is characterised by the visual landmarks of the Ladyhill and Duke of Gordon monument, Elgin Cathedral, St. Giles Church, Dr. Gray's Hospital, the Anderson Institute and other significant vertical markers which greatly aid orientation and create a striking skyline when viewed from certain approaches. 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.

3.48 The centre has 109 no. listed buildings and is a designated Conservation Area. Although the historic environment does create a largely attractive environment, the appearance of some parts of the town, e.g. western end of High Street, are tired and unkempt.

3.49 In line with other local authorities in Scotland, Moray Council produce monthly LEAMS reports, which utilise Keep Scotland Beautiful's "Cleanliness Index Monitoring System"[8]. This report provides a standardised technique for assessing street cleansing and provides a basis for comparing different towns. Each street is surveyed on an annual basis and is graded using the "Cleanliness Index Monitoring System" (e.g. Grade A; B; C; and D). According to the most recent LEAMS report, Elgin town centre scored a Grade B for cleanliness.

3.50 The impact of litter/general cleanliness on shopper and pedestrian amenity should not be underestimated. A range of consumer surveys were conducted as part of this study. Respondents were asked to rate the overall environmental quality of Elgin town centre, the results of which are set out below.

Table 11: Elgin- Environmental Quality- Survey Responses

Question	Business Survey	Householder Survey	Shopper Survey
Overall Environment Quality of Elgin Town Centre	Adequate	Good	Good

[8] See Keep Scotland Beautiful- www.keepscotlandbeautiful.org for further information.

Tourism

3.51 Information on Tourism was derived from the Visit Scotland website[9] and the Highlands and Islands Enterprise Moray website. Caution should be used when interpreting the results summarised below, as they do not relate specifically to the town centre but rather are a snap-shot of the overall tourism sector within Moray.

3.52 The *Moray Tourism Audit*[10], which was compiled by the Stevens View Partnership in 2004, utilises information from the *Scottish Tourism Economic Activity Monitor* (STEAM) report[11]. The key findings of the audit showed:

- There were 257,540 day visitors who spent a total of £9.42m or £36.58 per person, per trip.
- There were 107,180 tourists who stayed with friends or relatives for a total of 489,570 days and spent a total of £9.72m or £19.85 per person, per day.
- There were 265,660 tourists staying in serviced accommodation for 505,230 nights (average stay of 1.9 nights) and who spent a total of £43.25m or £85.60 per person, per day.
- There were 110,770 tourists staying in non-serviced accommodation for a total of 808,790 nights (average stay 7.3 nights) and who spent a total of £24.24m or £29.97 per person, per day.

3.53 The *Moray Tourism Audit* report, states that the dominance of a low value accommodation base may be suppressing tourist spend. The report concludes that the Moray market services a low spend, business market (individuals attending meetings, blue collar workers involved in defence or manufacturing activities), rather than the more lucrative corporate /conference markets that generally drive up yields from business tourism.

3.54 The findings of the Diversity of Uses surveys, undertaken by Moray Council staff, found there are 6 hotels and guesthouses and 19 restaurants located within Elgin town centre. Elgin Museum is located at No. 1 High Street and a Tourist Information office is located in Elgin Library, which lies just outside the town centre boundary. Elgin Museum attracted 7,486 visitors in 2009, a 7% increase on the 2008 visitor numbers[12]. Johnston's Cashmere Visitor Centre is located outwith the town centre, however it features on Visit Scotland's 'Top 5 Visitor Attractions' for the Aberdeen and Grampian region and attracted 202,200 visitors in 2009.[13]

3.55 The consumer surveys asked respondents to rate facilities and attractions for tourist in Elgin town centre, the results of which are set out overleaf.

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[9] See www.visitscotland.org/research_and_statistics for more information.
[10] http://www.moraytourism.org/wmslib/PDFs/Moray_Tourism.pdf
[11] http://www.moraytourism.org/market_research/economic_impact.aspx
[12] Source: Visit Scotland: The 2009 Visitor Attraction Monitor, 2010
[13] Source: Visit Scotland: Tourism in Northern Scotland, 2009

Table 12: Elgin- Tourism- Survey Responses

Question	Business Survey	Householder Survey	Shopper Survey
Facilities and attractions for tourists	Good	Good	Adequate

Crime and Safety

3.56 Crime statistics obtained from the *'Moray Division Public Performance Report Quarter 1 2009/2010'* provide a measure of the number of crimes and offences that can be considered as antisocial behaviour and impact on local communities. It should be noted that these figures do not relate specifically to the town centre, but rather to the whole of Elgin and the surrounding rural areas.

Table 13: Recorded Crime in Elgin

	Recorded Crime in Moray	Recorded Crime in Elgin
Recorded- Moray Division	**Q1 09/10**	**Q1 09/10**
Disregard for community/ personal wellbeing	491	204
Acts directed at people	43	14
Environmental damage	340	111
Misuse of public space	2	1
Total	**876**	**330**

3.57 According to the *Moray Road Safety Plan 2008-2010*, pedestrian casualties accounted for 12% of all road accident casualties in Moray during 2003- 2007. This is compared with over 16% in Scotland. The report suggests that nationally around 18% of pedestrian accidents happen at or near a pedestrian crossing, and 95% happen in built up areas. In Moray, during the period 2003-2007, approximately 82% of pedestrian accidents happened in built up areas. There is no specific information available regarding Elgin town centre. A number of schemes have been introduced with measures to aid pedestrians such as refuge islands, road narrowing to reduce road widths at crossing points, traffic calming at various schools throughout Moray as well as introducing controlled pelican and zebra pedestrian crossings.

3.58 During Quarter 1 of 2009/2010 there were no recorded fatal accidents on Moray roads, as illustrated by *Table 14* below.

Table 14: Persons killed or injured in road accidents- Moray

Persons Killed or Injured in Road Accidents (National Indicator)- Moray	Q1 09/10
Adults Killed	0
Adults seriously injured	8
Adults with slight injuries	48
Children killed	0
Children seriously injured	0
Children with slight injuries	6
Total	**62**

3.59 Crime, safety and perceptions of both, should not be underestimated as indicators of vitality in a centre. Crime and fear can also have an effect on the viability of a centre, if this puts off potential shoppers/users of a centre. Low crime rates can also encourage retailers and other local businesses to invest in a centre.

3.60 Consumer survey respondents were asked to rate both safety (from vehicles and traffic) and crime levels in Elgin town centre, the results of which are outlined below.

Table 15: Elgin- Crime and Safety- Survey Responses

Question	Business Survey	Householder Survey	Shopper Survey
Safety (from vehicles and traffic)	Adequate	Good	Good
Crime levels	Adequate	Good	Good

Elgin Town Centre Health Check Summary

3.61 Elgin town centre is a healthy and attractive centre which plays an important role in the region. The town centre provides a good range of comparison and convenience retailing 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. There are clear strengths within the centre. The Conservation Area and attractive built environment create a pleasing built realm for shoppers.

3.62 The vacancy rate accounts for 6.4% 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.

3.63 Details on the rental values being achieved in Elgin have been collated through discussion with commercial agents. Prime zone 'A' rentals of £37 per sq ft are being achieved in the High Street main shopping area. Further rental evidence would suggest that rentals of £35 per sq ft are being experienced in other retail locations including Batchen Street and South Street. Benchmarking data obtained from *Aberdeenshire Long Term Retail Requirements Study 2009*, estimates that £35 per sq ft are being achieved for prime zone rents in Inverurie. This figure can be contrasted to £115 per sq ft prime zone A rents being achieved in Inverness and £163 per sq ft in Aberdeen.

3.64 Based on the information in the retail model, turnover rates for retail goods businesses in the town centre appear to be healthy. It is estimated that the total turnover for all retail goods shops in the town centre is currently £106.99m: that is £48.8m for convenience shops (this is high reflecting the size of the Tesco superstore); £50.62m for general comparison; and £8.40m for bulky goods.

3.65 Based on information derived from the model, the figures for SFT for Moray residents in 2010 amounted to a total figure of £27.31m. The total figure can be disaggregated as follows: Convenience - £6.4m; General Comparison - £14.94m; and Bulky Goods - £5.97m.

3.66 Thus, the total available expenditure in Moray is broken down as follows: 6.5% is spent on SFT; 71.2% is spent in shops; and 22.3% is spent outwith Moray as expenditure leakage.

3.67 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. Overall, Elgin is a vital and viable town centre by national standards.

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, Asda, Lidl and B&Q) is a major commercial centre and a key focus for substantial retail activity. Inclusion of this area (to allow comparison to other centres) is also relevant for a limited range of indicators. The following Vitality and Viability Indicators have been examined for this area: Pedestrian Footfall; Diversity of Uses; Retailer Representation; Vacancy Rates; Turnover; and Accessibility.

Pedestrian Footfall

4.2 A pedestrian flow count was undertaken by Moray Council staff on Friday 1st and Saturday 2nd October 2010 at the Springfield Retail Park. Pedestrians, who crossed a point between the NEXT and Peacock store, were counted for five minute intervals, during the period 10.00 to 16.30. Cautions should be applied when interpreting these results, as the survey only recorded pedestrians who crossed the specific count point. 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 (together with 95% confidence limits) recorded on both Friday 1st and Saturday 2nd October is summarised in the *Chart* 3 and *4* below.

Chart 3: Springfield Retail Park- Hourly Pedestrian Flows- Friday 1st October 2010

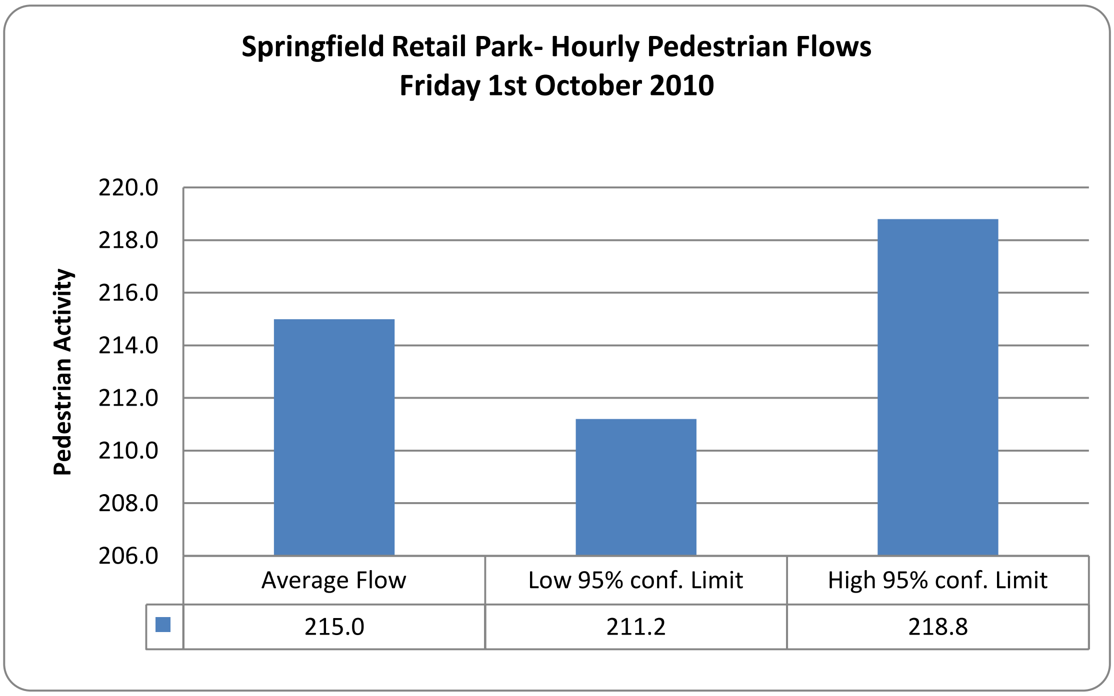
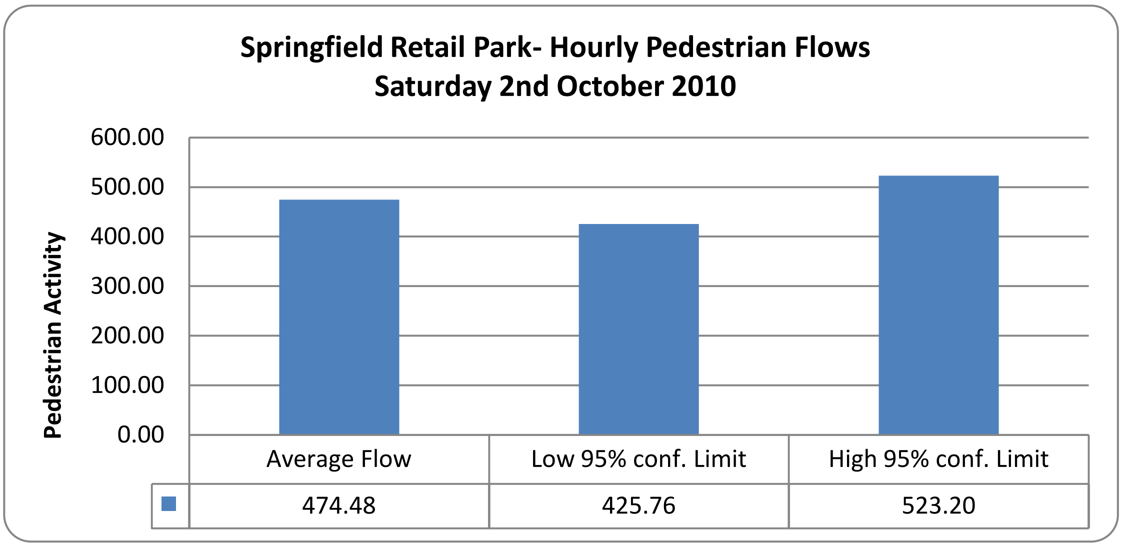


Chart 4: Springfield Retail Park- Hourly Pedestrian Flows- Saturday 2nd October 2010



Diversity of Uses

4.4 The Edgar Road area of Elgin provides a significant concentration of trading retail floorspace including the Asda superstore, B&Q superstore and the Springfield Retail Park. In total, the area has approximately 30,870 sqm gross retail floor area which is approximately 8,897 sqm less than the total gross comparison and convenience floor area of the town centre and is, by a considerable margin, the largest concentration of retail activity outwith Elgin town centre in Moray.

4.5 Information on the retail mix of the Edgar Road area of Elgin is set out below. It is notable that the area has 15 comparison goods retail units (18,432 sqm). Only a small proportion of units are for convenience goods but these include the Asda and Lidl stores and so, when one considers floorspace and turnover, convenience goods retailing comprises a significant proportion of the area's floorspace and turnover.

Table 16: Edgar Road- Diversity of Uses

Summary of Edgar Road Diversity of Uses Survey (July 2010)		
Type of Use	No. of Outlets	Floor space (sqm)
Comparison	15	18432
Convenience	2	12438
Retail Service	0	0
Leisure Service	1	Data Unavailable
Financial & Business Service	0	0
Health & Medical	1	270
Public Service	1	2713*
Religious Service	0	0
General Office Use	0	
Vacancy	9	6878
Total	**29**	**40,731**
Notes: *Territorial Army Centre		

Retailer Representation

4.6 There are 14 national (Scottish/UK) multiples in the Edgar Road Area out of a total of 16 retail goods shops (retail services are excluded from this analysis) – that is 87.5%. This figure is can be contrasted to Elgin town centre, where 42% of the retail goods shops are currently multiples.

Vacancy Rates

4.7 *Table 16* indicates that the number of vacant units identified by Moray Council planning staff was 9, which is a vacancy rate of 50%. Floorspace data obtained from previous planning application documents indicates that there is approximately 6,878 sqm (gross internal floor area) of vacant floorspace in the Edgar Road area. There is approximately 153.2 m of vacant retail frontage in the Edgar Road Retail Park (figure obtained by scaling off OS-base plans).

Turnover

4.8 Based on the information in the retail model, it is estimated that the total turnover for all retail goods shops in the area is currently £86.52m: that is £45.17m for convenience shops (this is high reflecting the size of the Asda superstore); £19.19m for general comparison; and £22.15m for bulky goods.

Accessibility

4.9 Edgar Road is served by both public and private transport. Route numbers 328 and 329 (Elgin-Pinefield/Thornhill/Bilbohall– Lossiemouth) service the route at twenty minute intervals Monday to Saturday and hourly on Sundays- (see Map 1, Paragraph 3.41). Elgin train station located on Station Road, provides local, regional and national connections. Both Asda and B&Q provide cycle rack facilities.

Edgar Road Health Check Summary

4.10 The Edgar Road area of Elgin provides a significant concentration of trading retail floorspace. It is notable that the area has 15 comparison goods retail units (18,432 sqm). Only a small proportion of units are for convenience goods but these include the Asda and Lidl stores and so, when one considers floorspace and turnover, convenience goods retailing comprises a significant proportion of the area's floorspace and turnover.

4.11 The number of vacant units identified by Moray Council planning staff was 9, which is a vacancy rate of 50%. Floorspace data obtained from previous planning application documents indicates that there is approximately 6,878 sqm (gross internal floor area) of vacant floorspace in the Edgar Road area.

4.12 Based on the information in the retail model, it is estimated that the total turnover for all retail goods shops in the area is currently £86.52m: that is £45.17m for convenience shops (this is high reflecting the size of the Asda superstore); £19.19m for general comparison; and £22.15m for bulky goods. As noted above in paragraph

3.37, it is estimated that the total turnover for all retail goods shops in Elgin town centre is currently £106.99m.

5 Forres Town Centre Health Check

Pedestrian Footfall

5.1 A pedestrian flow count was undertaken by Moray Council staff on Thursday 2nd (between 14.00 and 17.15) and Saturday 4th September 2010 (between 10.00 and 13.15). Pedestrian footfall data was collected at 2 positions throughout the town centre. Full details of the survey locations are provided below. A plan of the footfall survey location in provided in Appendix II.

Table 17: Details of Forres Footfall Survey

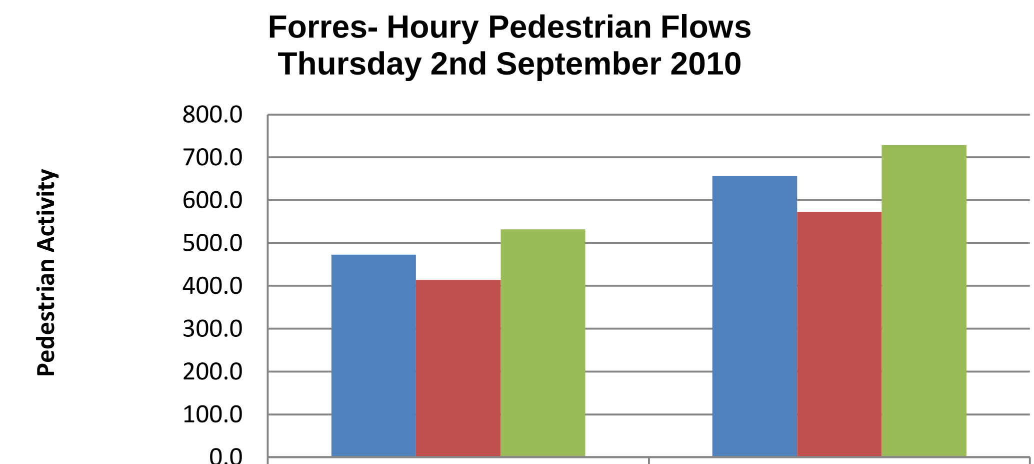
Enumeration Point	Location
A	No. 42 High Street- (Superdrug)
B	No. 90 High Street- (Boots Chemist)

5.2 Of the two locations, the position outside Boots in High Street (Point B) recorded the busiest footfall with an average hourly figure of 656.4 persons on Thursday 2nd and 889.2 persons on Saturday 4th September.

5.3 The lowest pedestrian flow count in the town centre was recorded at the north-eastern end of High Street, - at Superdrug (Point A), with an average hourly figure of 472.8 persons on the Thursday and 424.8 persons on the Saturday.

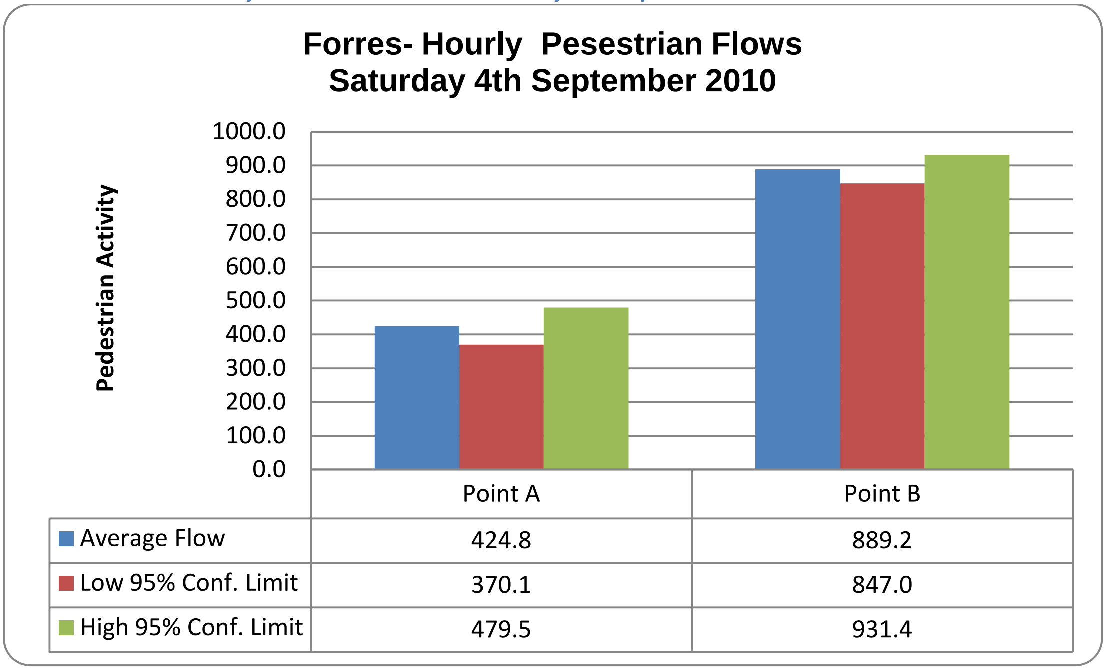
5.4 An overview of the average hourly flows (together with 95% confidence limits) recorded on both Thursday 2nd and Saturday 4h September are summarised in *Chart 5* and *6* below. It is notable that weather conditions were very favourable on both count dates, with sunny conditions and temperatures ranging from 15-17 degrees Celsius.

Chart 5: Forres Hourly Pedestrian Flows- Thursday 2nd September 2010



	Point A	Point B
Average Flow	472.8	656.4
Low 95% Conf.Limit	413.4	572.5
High 95% Conf. Limit	532.2	728.3

Chart 6: Forres Hourly Pedestrian Flows- Saturday 4th September



5.5 We can also look at the variation in pedestrian flows at different times of the day for the total enumeration period. Analysis of the Thursday count revealed that overall, 32.6% of the total flow occurs between 14.00 and 14.55, whilst 30.3% occurs between 15.00 and 15.55. This figure rises to 37% after 16.00 hours. This increase can be accounted for by employees finishing work. Further details of the weekday Time of Day Analysis is illustrated in *Table 18* below.

Table 18: Forres- Time of Day Analysis- Thursday 2nd September 2010

	Enumeration Point	14.00-14.55	%	15.00-15.55	%	16.00-16.55	%
A	No. 42 High Street-(Superdrug)	111	32.1%	105	30.3%	130	37.6%
B	No. 90 High Street-(Boots Chemist)	158	33.1%	145	30.3%	175	36.6%
	Total	269	**32.6%**	250	**30.3%**	305	**37.0%**

5.6 Analysis of the Saturday count revealed that overall 31.6% of the total flow occurs between 10.00 and 10.55, increasing to 33.8% during the period 11.00 to 11.55. The overall total flow increased further to 34.5%, between 12.00 and 12.55. Further details of the Time of Day Analysis recorded on Saturday 4th September is illustrated in *Table 19* overleaf.

Table 19: Forres- Time of Day Analysis- Saturday 4th September 2010

	Enumeration Point	10.00-10.55	%	11.00-11.55	%	12.00-12.55	%
A	No. 42 High Street-(Superdrug)	92	29.2%	109	34.6%	114	36.2%
B	No. 90 High Street-(Boots Chemist)	220	32.7%	225	33.5%	227	33.8%
	Total	312	**31.6%**	334	**33.8%**	341	**34.5%**

Diversity of Uses

5.7 Forres accommodates a range of retail facilities which are discussed below. In addition to retailing, the centre also contains a range of non-retail facilities and activities which reflect the role of the centre. There is a public library on the edge of the town centre and a small museum on Tolbooth Street.

5.8 Information on the retail mix of Forres town centre is set out below. The table demonstrates that the dominant uses within Forres are comparison shops (e.g. clothing and footwear) and services (e.g. hairdressers; cafes; travel agents etc.). It is notable that the area has 34 comparison goods retail units (4,701sqm); 12 convenience outlets (2,269 sqm), including the Co-operative store; 17 retail service units (1,316 sqm); 22 Leisure Services uses; and 14 Financial & Business Services (3741 sqm). Forres town centre provides a good range of convenience goods shopping and reasonable range of comparison goods shops, however, there is no town centre anchor store – Tesco and Lidl have developed out of centre.

5.9 The overall mix of uses and the quantum of floorspace they occupy is summarised in the table below.

Table 20: Forres- Diversity of Uses

Summary of Forres Diversity of Uses Survey (July 2010)		
Type of Use	**No. of Outlets**	**Floor space (sqm)**
Comparison	34	4701
Convenience	12	2269
Retail Service	17	1316
Leisure Service	22	1469*
Financial & Business Service	14	3741
Health & Medical	4	293
Public Service	8	5838
Religious Service	3	1750
General Office Use	14	618
Vacancy	7	2274**
Total	**135**	**24,269**

Notes:
*The Regional Assessor does not hold floor space data for Hotels and Public House premises
** No. 29 Caroline Street is a vacant public house; however the Regional Assessor does not hold floorspace data on this building.

5.10 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.

5.11 Within Forres town centre, there are also a number of 'town centre' facilities that are used after shopping hours for activities such as eating and drinking. In particular, there are several notable public houses/hotels such as The Carlton Hotel and The Newmarket Bar and Restaurant. Additionally, there are a number of restaurants located within the centre, including Chapter One. Overall we consider that the variety of out-of-hours activities, given the town's size, is fair.

5.12 Consumer survey respondents were asked a range of questions relating to the range of retail and other services provided in Forres town centre.

Table 21: Forres- Diversity of Uses- Survey Responses

Question	Business Survey	Householder Survey	Shopper Survey
Range of shopping	Adequate	Adequate	Adequate
Range of other services for personal business (e.g. banks, building societies, estate and travel agents)	Good	Good	Good
Provision of other facilities and services (e.g. Council services, leisure or sports facilities)	Good	Adequate	Adequate
Range of places for entertainment (e.g. including eating out/ cinema etc.)	Adequate	Adequate	Adequate

Retailer Representation

5.13 There are 8 national (Scottish/UK) multiples in the town centre out of a total of 48 retail goods shops (retail services are excluded from this analysis) – that is 17%. This rate is comparable to Peterhead with a 22% multiple representation. 3 (6%) units within the town centre were identified to be charity shops.

5.14 Much of Forres's character comes from its independent retail provision, which has been commented upon by others (including those consulted in this study through the consumer surveys) as being a strength of the town centre.

Vacancy Rates

5.15 *Table 20* above indicates that the number of vacant units identified by Moray Council planning staff was 7, which is a vacancy rate of 8.2%- which is slightly below the average rate for Scotland. However, vacancies in Forres have increased from 5 vacant units (5.9%) since this indicator was previously collected for Forres in 2008[14].

[14] Figure obtained from the '*Linkwood and Edgar Road Area Cumulative Retail Impact Assessment Final Report'*, February 2009.

5.16 Floorspace data obtained from the Regional Assessor indicates that there is approximately 2,274 sqm of vacant floorspace in Forres town centre. However, this is an estimate as data is unavailable for No. 29 Caroline Street, which is a vacant public house. There is approximately 53.2 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 7.27% 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 an indicator of the impact that vacancies have on the appearance and feel of Forres centre, since this is what most shoppers in the centre will be aware of.

Retailer Intentions

5.17 There was a 9.4% response rate to the Forres Business Survey. The majority (60%) of the respondents to the survey indicated that they intended to maintain their business in the town centre over the next five years. Similarly, 60% of the existing retailers suggested that they intend to invest in their business over the next 5 years, with the average level of investment being £1,000. Analysis of the survey responses found that a higher proportion of retailer (80%), were not actively seeking a new premises within the town centre.

5.18 When asked how they think business has changed for the whole of the town centre over the past three years, the majority of respondents felt it had 'Declined Moderately'.

5.19 Respondents were asked to estimate how they expected their business turnover to change in the next three years. Analysis of the results suggests that retailers are forecasting a 17.9% decline in turnover over the next three years. Despite the negative responses of the survey, retailers noted the major strengths of Forres town centre as including the following:

- Service & support;
- Free parking;
- Attractive Scotland in Bloom displays;
- Reasonable choice of shops;
- Lots of individual shops- few big names;
- A brilliant supportive community; and
- Tourist/ visitors trade.

Rent and Yield

5.20 There is no published retail rental and yield values for Forres town centre and the local agents contacted did not hold information in this regard.

Turnover

5.21 Based on the information in the retail model it is estimated that the total turnover for all retail goods shops in Forres town centre is currently £10.25m: that is £4.86

for convenience shops; £4.64m for general comparison; and £0.76m for bulky goods. Turnover rates are average for this type of centre.

Accessibility

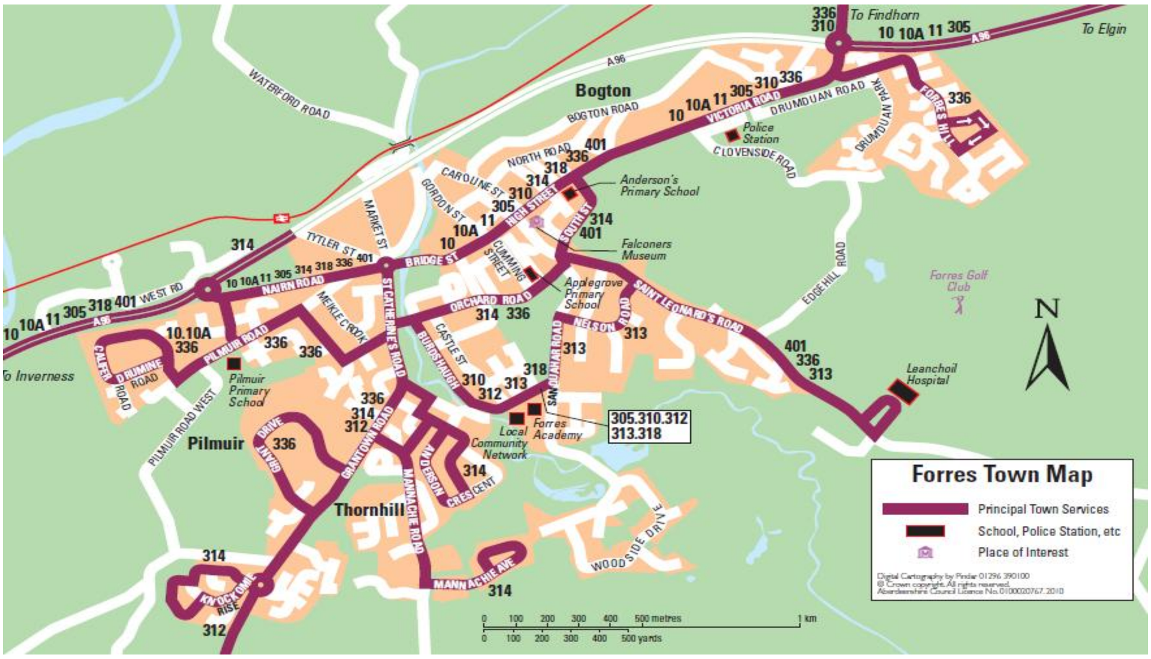
5.22 There are a number of car parks in Forres town centre, including five that are publicly owned and maintained by Moray Council. These car parks are free to use. *Table 22* below summarises the number of public car parking spaces provided in Forres town centre.

Table 22: No. of Car Parking Space in Forres

				No. of Spaces (surveyed 16/09/2010)					
Car Park	**Car**	**Disabled**	**Parent & Child**	**M/C**	**Bus**	**Taxi**	**Lorry**	**Cycle**	**Pay & Display**
Cumming Street	11	1							
High Street	42	5		1					
Leask Road	62	4							
Leys Road	57	4							
Tulloch Park	80	2							

5.23 Forres is well served by public transport and a number of regional bus routes include the centre, as illustrated by *Map 3* below. 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, which provides links to Edinburgh and London, and also links the area to the Islands as well as Europe.

Map 3: Forres Public Transport (Source: Aberdeenshire and Moray Public Transport Guide 2010)



5.24 Consumer survey respondents were asked to rate car parking provision; cost of parking; ease of travel by public transport and ease of travel by private car in Forres town centre. The results of the surveys are set out below.

Table 23: Forres- Accessibility- Survey Responses

Question	Business Survey	Householder Survey	Shopper Survey
Car Parking Provision	Good	Good	Good
Cost of Car Parking	Very Good	Good	Very Good
Ease of Travel by Public Transport	Good	Good	Good
Ease of Travel by Private Car	Good	Good	Good

Environmental Quality

5.25 The town centre falls within a Conservation Area and consequently contains high numbers of historic buildings incorporating many different historic periods. Although the historic streetscapes help create an aesthetically pleasing environment, traffic is a concern in parts of the centre, especially on High Street, as commented upon by the respondents of the Forres Business Survey. Many of the retailers receive deliveries through their frontage and this can lead to traffic hold-ups caused by large lorries attempting to manoeuvre through the street.

5.26 According to the most recent LEAMS report, Forres town centre scored a Grade B for cleanliness. The impact of litter/general cleanliness on shopper and pedestrian amenity should not be underestimated. The respondents to the consumer surveys were asked to rate the overall environmental quality of Forres town centre, the results of which are set out below.

Table 24: Forres: Environmental Quality- Survey Responses

Question	Business Survey	Householder Survey	Shopper Survey
Overall Environment Quality of Forres Town Centre	Good	Good	Good

Tourism

5.27 Forres is a popular destination for tourists with a number of buildings offering tourist attractions including the Falconer Museum and the Tourist Information office. Founded in 1871, the museum tells the story of Dr Hugh Falconer, an eminent 19th century geologist, archaeologist and palaeontologist who discovered the theory of "Punctuated Equilibrium". The Museum attracted 14,677 visitors in 2009, a 6.6% decrease on the 2008 visitor numbers[15]. The attractive urban environment is also a strength of the town for visitors and tourists. The Mercat Cross stands in the centre of High Street. It was erected in 1844 and is built in a striking gothic style.

5.28 The findings of the Diversity of Uses surveys, undertaken by Moray Council staff, found there are 2 hotels and guesthouses and 4 restaurants located within Forres

[15] Source: Visit Scotland: The 2009 Visitor Attraction Monitor, 2010

town centre. The Falconer Museum and a tourist information office are also located within the town centre.

5.29 Consumer survey respondents were asked to rate facilities and attractions for tourist provided in Forres town centre, the results of which are set out below.

Table 25: Forres- Tourism- Survey Responses

Question	Business Survey	Householder Survey	Shopper Survey
Facilities and attractions for tourists	Adequate	Good	Adequate

Crime and Safety

5.30 Crime statistics obtained from the '*Moray Division Public Performance Report Quarter 1 2009/2010'* provide a measure of the number of crimes and offences that can be considered as antisocial behaviour and impact on local communities. Caution should be used when interpreting these results as the Forres Inspectorate area includes the whole of Forres, Aberlour, Rothes, Dufftown, Tomintoul and the rural areas around these towns.

Table 26: Recorded Crimes in the Forres Inspectorate Area

	Recorded Crime in Moray	Recorded Crime in Forres
Recorded- Moray Division	**Q1 09/10**	**Q1 09/10**
Disregard for community/ personal wellbeing	491	98
Acts directed at people	43	13
Environmental damage	340	69
Misuse of public space	2	0
Total	**876**	**180**

5.31 Respondents of the consumer surveys were asked to rate both safety (from vehicles and traffic) and crime levels in Forres town centre, the results of which are outlined below in *Table 27*.

Table 27: Forres- Crime and Safety- Survey Responses

Question	Business Survey	Householder Survey	Shopper Survey
Safety (from vehicles and traffic)	Poor	Good	Good
Crime levels	Adequate	Good	Good

Forres Town Centre Health Check Summary

5.32 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, however, there is no town centre anchor store – Tesco and Lidl have developed out of centre.

5.33 The number of vacant units identified by Moray Council planning staff was 7, which is a vacancy rate of 8.2%- which is slightly below the average rate for Scotland.

5.34 Based on the information in the retail model it is estimated that the total turnover for all retail goods shops in Forres town centre is currently £10.25m: that is £4.86 for convenience shops; £4.64m for general comparison; and £0.76m for bulky goods. Turnover rates are average for this type of centre. Overall, Forres is a relatively 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 Friday 10th (between 14.00 and 17.15) and Saturday 11th (between 10.00 and 13.15) September 2010. Pedestrian footfall data was collected at 2 positions throughout the town centre. Details of the survey locations are provided below. A plan of the footfall survey location in provided in Appendix II.

Table 28: Details of Keith Footfall Survey

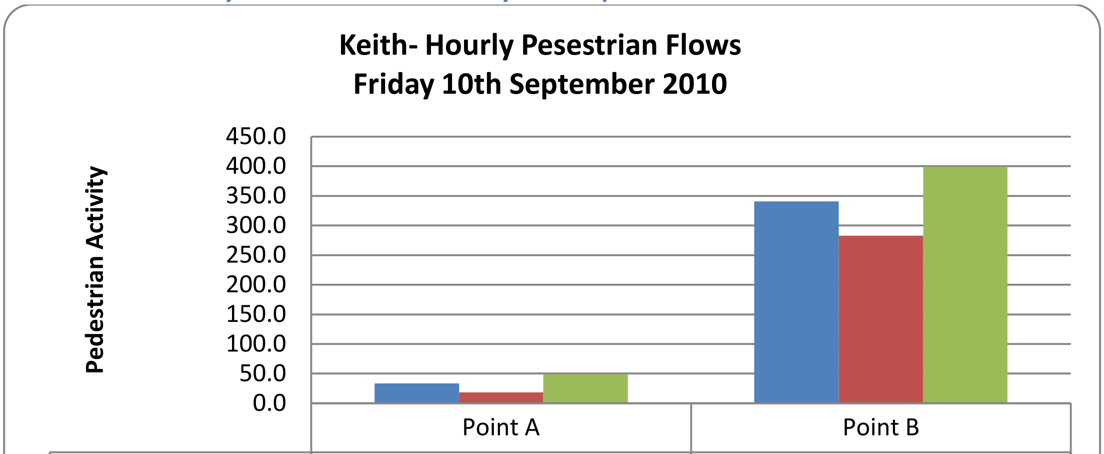
Enumeration Point	Location
A	No. 140 Moss Street- (Pedestrian Crossing on A96 to access TESCO)
B	No.130-132 Mid Street- (Post Office)

6.2 Of the two locations, the position outside the Post Office on Mid Street (Point B) recorded the busiest footfall with an average hourly figure of 340.8 persons on the Friday and 256.8 persons on the Saturday. Pedestrian footfall was much lower in Keith compared to both Buckie (average hourly flow was 490.8 persons on Friday 10th September) and Forres (average hourly flow was 472.8 persons on Thursday 2nd September). The weather conditions on these days were similar.

6.3 The lowest pedestrian flow count in the town centre was recorded at the pedestrian crossing on the A96 to access TESCO with an average hourly figure of 2.6 persons on the Thursday and 3 persons on the Saturday. Although extremely low pedestrian activity was recorded at Point A, a much larger number of cars were observed both entering and exiting the TESCO car park, suggesting that people drive their cars to this location, rather than walking from the town centre.

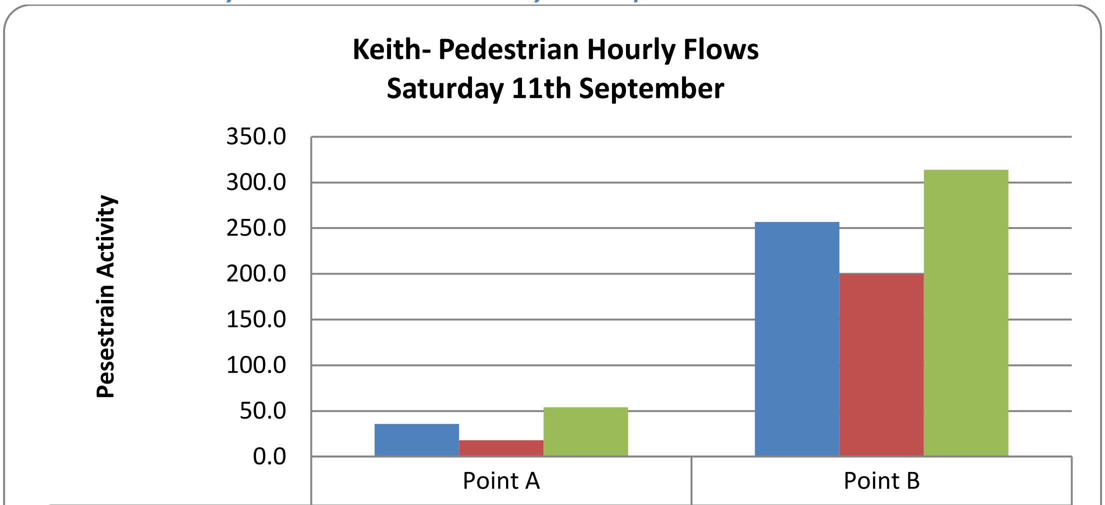
6.4 An overview of the average hourly flows (together with 95% confidence limits) recorded on both Friday 10th and Saturday 11th September is summarised in *Charts 7* and *8* overleaf.

Chart 7: Keith- Hourly Pedestrian Flows- Friday 10th September 2010



	Point A	Point B
Average Flow	33.6	340.8
Low 95% Conf. Limit	18.2	282.5
High 95% Conf. Limit	49.0	399.1

Chart 8: Keith- Hourly Pedestrian Flows- Saturday 11th September 2010



	Point A	Point B
Average Flow	36.0	256.8
Low 95% Conf. Limit	18.1	199.8
High 95% Conf. Limit	53.9	313.8

6.5 We can also look at the variation in pedestrian flows at different times of the day for the total enumeration period. Analysis of the Friday count revealed that overall, pedestrian flow was consistent during the course of the count period. Further details of the weekday Time of Day Analysis is illustrated in *Table 29* overleaf.

Table 29: Keith- Time of Day Analysis- Friday 10th September 2010

	Enumeration Point	14.00-14.55	%	15.00-15.55	%	16.00-16.55	%
A	No. 140 Moss Street (Pedestrian Crossing on A96 to access TESCO)	10	40.0%	12	48.0%	3	12.0%
B	No. 130-132 Mid Street- (Post Office)	82	31.8%	84	32.6%	92	35.7%
	Total	92	**32.5%**	96	**33.9%**	95	**33.6%**

6.6 Analysis of the Saturday count revealed that 29.7% and 29.2% of the footfall occurred between the periods 10.00 to 10.55 and 11.00 to 11.55 respectively. The overall total flow increased significantly to 41% during the period 12.00 to 12.55. Further details of the Time of Day Analysis recorded on Saturday 11th September is illustrated in *Table 30* below.

Table 30: Keith- Time of Day Analysis- Saturday 11th September 2010

	Enumeration Point	10.00-10.55	%	11.00-11.55	%	12.00-12.55	%
A	No. 140 Moss Street (Pedestrian Crossing on A96 to access TESCO)	3	12.0%	12	48.0%	10	40.0%
B	No. 130-132 Mid Street- (Post Office)	60	32.1%	50	26.7%	77	41.2%
	Total	63	**29.7%**	62	**29.2%**	87	**41.0%**

Diversity of Uses

6.7 Moray Council staff undertook a site survey of Keith Town Centre[16] during July 2010. Information on the retail mix of the town centre is set out below. It is notable that the area has 24 comparison goods retail units (4,949sqm); 11 convenience outlets (1,353 sqm); and 12 retail service units (722.5 sqm). 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.

6.8 In terms of diversity of retail uses, within the town centre boundary, the overall mix of uses is summarised in the table below.

[16] Survey excludes Fife Keith town centre.

Table 31: Keith- Diversity of Uses

Summary of Keith Diversity of Uses Survey (July 2010)		
Type of Use	**No. of Outlets**	**Floor space (sqm)**
Comparison	24	4949
Convenience	11	1353
Retail Service	12	722.5
Leisure Service	19*	1360**
Financial & Business Service	11	1209
Health & Medical	0***	0
Public Service	2	2588
Religious Service	2	904
General Office Use	7	716
Vacancy	6	765****
Total	**93**	**14,566.5**

Notes:
*Keith Sport & Community Centre is located on Banff Road, Keith.
**The Regional Assessor does not hold floor space data for Hotels and Public House premises
***Both Keith Dental Practice, located on Moss Street, and Keith Health Centre located on Turner Street, are just outside the town centre boundary.
****No. 61 Mid Street is a vacant public house; however the Regional Assessor does not hold floorspace data on this building.

6.9 The town possess a limited range of non-retail services in the town centre including: a clinic; churches; council services, and financial services.

6.10 A range of consumer surveys were conducted as part of this study, including Business, Household and Shopper surveys. Respondents were asked a range of questions relating to the range of retail and other services provided in Keith town centre.

Table 32: Keith- Diversity of Uses- Survey Responses

Question	Business Survey	Householder Survey	Shopper Survey
Range of shopping	Adequate	Adequate	Adequate
Range of other services for personal business (e.g. banks, building societies, estate and travel agents)	Adequate	Good	Good
Provision of other facilities and services (e.g. Council services, leisure or sports facilities)	Adequate	Adequate	Good
Range of places for entertainment (e.g. including eating out/ cinema etc.)	Very Poor	Poor	Adequate

Retailer Representation

6.11 There are 5 national (Scottish/UK) multiples in the town centre out of a total of 35 retail goods shops (retail services are excluded from this analysis) – that is 14%. In terms of convenience goods, a Somerfield store (399.6 sq m net internal area) is located within the town centre on Mid Street. From our site visits, we note that this store is popular with a good range of convenience goods available and circa 4 checkouts. In addition, a Tesco store is located off Moss Street, adjacent to the defined town centre boundary.

6.12 2 units (6%) were identified to be charity shops; this rate is similar to both Forres (6%) and Buckie (7%).

6.13 The independent sector has been commented upon by others (including those consulted in this study through the consumer surveys) as being a strength of the town centre. Respondents of the Keith Business Survey commented that there are some very good local shops in the town centre that provide a friendly service.

Vacancy Rate

6.14 *Table 31* above indicates that the number of vacant units identified by Moray Council planning staff was 6, which is a vacancy rate of 9.1%- higher than both Forres (8.2%) and Buckie (5.8%)

6.15 Floorspace data obtained from the Regional Assessor indicates that there is approximately 765 sqm of vacant floorspace in Keith[17]. However, this is an estimate as data is unavailable for No.56-66 Mid Street, formerly Grieg's, which is a vacant public house. There is approximately 77 m of vacant retail frontage in the town centre (figure obtained by scaling off OS-base plans). This figure equates to approximately 7.9% of the retail frontage on the traditional shopping street in Keith, which is Mid Street.

Retailer Intentions

6.16 Moray Council received a 13% response rate to the Keith Business Survey. The majority of the respondents to the Keith Survey indicated that they intended to maintain their business in the town centre over the next five years. Also, 43% of the existing retailers suggested that they intend to invest in their business over the next 5 years, with the average level of investment ranging from £5,000 to £10,000.

6.17 Analysis of the survey responses found that a higher proportion of retailers (80%), were not actively seeking new premises within the town centre.

6.18 When asked how they think business has changed for the whole of the town centre over the past three years, the majority of respondents felt it had 'Declined Slightly'.

6.19 Respondents were asked to estimate how they expected their business turnover to change in the next three years. Analysis of the results suggests that retailers are forecasting a 0.1% increase in turnover over the next three years. Retailers noted the strengths of Keith town centre as including the following:

[17] This figure does not include the former Tesco building which is located outside the defined town centre.

- Good communication between shop owners;
- Traditional shops;
- Some very good shops with variety and niche markets;
- All shops on one street;
- Personal Service;
- Privately owned business with friendly service;
- Quality products;
- Plenty of free parking; and
- Keith is not pedestrianised- as people like to park near shop doors.

Rent and Yield

6.20 There is no published retail rental and yield values for Keith town centre and the local agents contacted did not hold information in this regard.

Turnover

6.21 According to the analysis of the strategic retail model, Keith town centre had an estimated annual retail goods turnover in the region of £9.6m in 2010. Of this total, £2.69m was derived from convenience shops; £5.02m for general comparison; and £1.89m for bulky goods. Turnover rates are close to average for this type of centre. The retail turnover figures stated above, excludes the Tesco store, which is located just outside the town centre boundary. Based on the information in the retail model, the estimated total turnover for the Tesco store is £10.93m (i.e. £8.87m convenience and £2.06m general comparison).

Accessibility

6.22 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, however, it provides regular services to Inverness and Aberdeen.

6.23 There are several car parks in Keith, with 211 spaces provided in Council run car parks as well as some on street parking in the town centre. The car parks offer free parking. *Table 33* overleaf summarises the number of car parking spaces provided in Keith town centre.

Table 33: No. of Car Parking Spaces in Keith

	No. of Spaces (surveyed 16/09/2010)								
Car Park	**Car**	**Disabled**	**Parent & Child**	**M/C**	**Bus**	**Taxi**	**Lorry**	**Cycle**	**Pay & Display**
Bankers Lane	15	1							
Coopers Lane	12	1							
Innes Lane	36	1							
Mid Street	40	2							
Regent Square	36	1							
Reidhaven Square	59	6		1					

6.24 Consumer survey respondents were asked to rate car parking provision; cost of parking; ease of travel by public transport and ease of travel by private car in Keith town centre. The results of the surveys are set out below.

Table 34: Keith- Accessibility- Survey Responses

Question	Business Survey	Householder Survey	Shopper Survey
Car Parking Provision	Good	Good	Good
Cost of Car Parking	Very Good	Good	Good
Ease of Travel by Public Transport	Adequate	Adequate	Good
Ease of Travel by Private Car	Good	Good	Good

Environmental Quality

6.25 Keith Town Centre benefits from being a Conservation Area. Much of the town centre is of good environmental quality and contains a number of listed buildings. The quality of environment is poorer in some of the fringe locations within the town centre. A proliferation of vacant buildings is a particular problem around the south end of Mid Street.

6.26 According to the most recent LEAMS report, Keith town centre scored a Grade A for cleanliness. The impact of litter/general cleanliness on shopper and pedestrian amenity should not be underestimated. Respondents to the consumer surveys were asked to rate the overall environmental quality of Keith town centre, the results of which are set out below.

Table 35: Keith- Environmental Quality- Survey Responses

Question	Business Survey	Householder Survey	Shopper Survey
Overall Environment Quality of Forres Town Centre	Adequate	Good	Good

Tourism

6.27 The findings of the Diversity of Uses surveys, undertaken by Moray Council staff, found there are 6 hotels and guesthouses located within Keith town centre.

6.28 Consumer survey respondents were asked to rate facilities and attractions for tourist provided in Keith town centre, the results of which are set out below.

Table 36: Keith- Tourism- Survey Responses

Question	Business Survey	Householder Survey	Shopper Survey
Facilities and attractions for tourists	Poor	Adequate	Adequate

Crime and Safety

6.29 Crime statistics obtained from the '*Moray Division Public Performance Report Quarter 1 2009/2010*' provide a measure of the number of crimes and offences that can be considered as antisocial behaviour and impact on local communities. Caution should be used when interpreting these results as the Keith is included in the Buckie Inspectorate area, which comprises Buckie, Cullen, Keith and surrounding rural areas.

Table 37: Recorded Crimes in the Buckie Inspectorate Area

	Recorded Crime in Moray	Recorded Crime in Buckie
Recorded- Moray Division	**Q1 09/10**	**Q1 09/10**
Disregard for community/ personal wellbeing	491	128
Acts directed at people	43	10
Environmental damage	340	98
Misuse of public space	2	1
Total	**876**	**237**

6.30 The consumer survey respondents were asked to rate both safety (from vehicles and traffic) and crime levels in Keith town centre, the results of which are outlined below:

Table 38: Keith- Crime and Safety- Survey Responses

Question	Business Survey	Householder Survey	Shopper Survey
Safety (from vehicles and traffic)	Adequate	Adequate	Good
Crime levels	Adequate	Good	Good

Keith Town Centre Health Check Summary

6.31 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 24 comparison goods retail units (4,949sqm); 11 convenience outlets (1,353 sqm); and 12 retail service units (722.5 sqm). There are 5 national (Scottish/UK) multiples in the town centre out of a total of 35 retail goods shops (retail services are excluded from this analysis) – that is 14%.

6.32 There are, however, some weaknesses in the centre. The number of vacant units identified by Moray Council planning staff was 6, which is a vacancy rate of 9.1%- higher than both Forres (8.2%) and Buckie (5.8%). A proliferation of vacant buildings is a particular problem around the south end of Mid Street.

6.33 According to the analysis of the strategic retail model, Keith town centre had an estimated annual retail goods turnover in the region of £9.6m in 2010. Of this total, £2.69m was derived from convenience shops; £5.02m for general comparison; and £1.89m for bulky goods. Turnover rates are close to average for this type of centre. The retail turnover figures stated above, excludes the Tesco store, which is located just outside the town centre boundary. Based on the information in the retail model, the estimated total turnover for the Tesco store is £10.93m (i.e. £8.87m convenience and £2.06m general comparison).

6.34 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 Friday 10th (between 10.00 and 13.15) and Saturday 11th September 2010 (between 14.00 and 17.15). Pedestrian footfall data was collected at 2 positions in the town centre. Details of the survey locations are provided below. A plan of the footfall survey location in provided in Appendix II.

Table 39: Details of the Buckie Footfall Survey

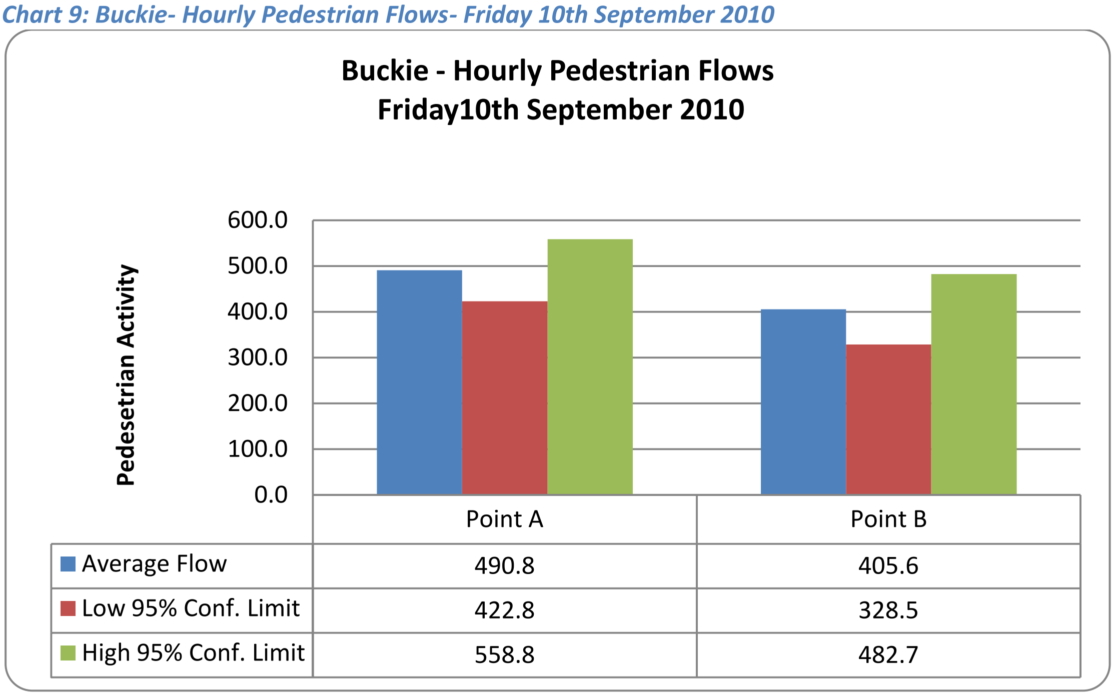
Enumeration Point	Location
A	No. 3 High Street- (Asher's Bakery)
B	No.3-5 East Church Street- (Nationwide)

7.2 Of the two locations, the position at Asher's Bakery on High Street (Point A) recorded the busiest footfall with an average hourly figure of 490.8 persons on the Friday and 313.2 persons on the Saturday.

7.3 Slightly lower pedestrian activity was recorded at on East Church Street- opposite Nationwide, with an average hourly figure of 405.6 persons on the weekday count and 289.2 persons on the Saturday.

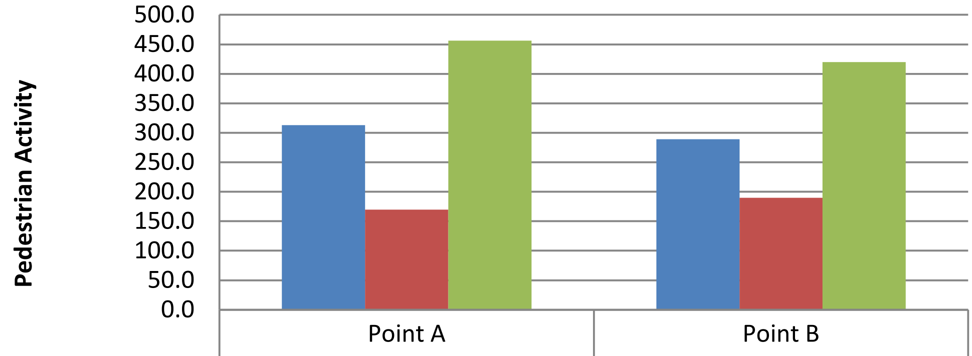
7.4 An overview of the average hourly flows (together with 95% confidence limits) recorded on both Friday 10th and Saturday 11th September are summarised in *Charts 9* and *10* below.

Chart 9: Buckie- Hourly Pedestrian Flows- Friday 10th September 2010



	Point A	Point B
Average Flow	490.8	405.6
Low 95% Conf. Limit	422.8	328.5
High 95% Conf. Limit	558.8	482.7

Chart 10: Buckie- Hourly Pedestrian Flows- Saturday 11th September 2010



	Point A	Point B
Average Flow	313.2	289.2
Low 95% Conf. Limit	169.9	189.6
High 95% Conf. Limit	456.5	420.0

7.5 We can also look at the variation in pedestrian flows at different times of the day for the total enumeration period. Analysis of the Friday count revealed that overall, pedestrian flow was lowest during the 10.00 to 10.55 period and increased significantly to 39.2% between 11.00 and 11.55. Further details of the weekday Time of Day Analysis is illustrated in *Table 40* below.

Table 40: Buckie- Time of Day Analysis- Friday 10th September 2010

	Enumeration Point	10.00-10.55	%	11.00-11.55	%	12.00-12.55	%
A	No. 3 High Street- (Asher's Bakery)	94	25.8%	140	38.5%	130	35.7%
B	No.3-5 East Church Street- (Nationwide)	72	23.9%	121	39.0%	108	34.8%
	Total	166	**25.0%**	261	**39.2%**	238	**35.8%**

7.6 Analysis of the Saturday count revealed that 31.7% and 33.9% of the overall footfall occurred between the periods 14.00 to 14.55 and 15.00 to 15.55 respectively. The overall total flow increased to 34.4% during the period 16.00 to 16.55. Further details of the Time of Day Analysis recorded on Saturday 11th September is illustrated in *Table 41* overleaf.

Table 41: Buckie- Time of Day Analysis- Saturday 11th September 2010

	Enumeration Point	14.00-14.55	%	15.00-15.55	%	16.00-16.55	%
A	No. 3 High Street-(Asher's Bakery)	86	36.1%	82	34.5%	70	29.4%
B	No.3-5 East Church Street-(Nationwide)	59	26.9%	73	33.3%	87	39.7%
	Total	145	**31.7%**	155	**33.9%**	157	**34.4%**

Diversity of Uses

7.7 Buckie accommodates a range of retail facilities which are discussed below. In addition to retailing the centre also hosts a wide range of non-retail facilities and activities. These include a number of leisure units within the town centre including the Carlton Clubs Bingo hall and numerous social clubs.

7.8 Information on the retail mix of Buckie town centre is set out below. It is notable that the area has 33 comparison goods retail units (4,873 sqm); 9 convenience outlets (3,685 sqm); and 14 retail service units (989 sqm). 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. The overall mix of uses and the quantum of floorspace they occupy is summarised in the table below.

Table 42: Buckie- Diversity of Uses

Summary of Buckie Diversity of Uses Survey (July 2010)		
Type of Use	**No. of Outlets**	**Floor space (sqm)**
Comparison	33	4873
Convenience	9	3685
Retail Service	14	989
Leisure Service	13	1283*
Financial & Business Service	17	1797
Health & Medical	1	458
Public Service	4	556**
Religious Service	3	1621
General Office Use	10	1771
Vacancy	4	453
Total	**108**	**17,486**

Notes:
*The Regional Assessor does not hold floor space data for Hotels and Public House premises
**Missing floorspace data for the Fire Station on East Cathcart Street

7.9 There is a good range of convenience goods shopping including supermarkets and reasonable range of comparison goods shops. Both Haldones and Lidl provide key anchor roles for the town centre. Tesco is also now trading in Buckie, however, this is located outside the defined town centre boundary. Buckie also provides a good range of retail service and financial and business outlets.

7.10 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.

7.11 The town centre provides a reasonable range of non-retail services in the town centre including: Job Centre; churches; council services; leisure (bingo). Close to, but outwith the defined town centre, is the library and fishing heritage centre. In overall terms therefore, the centre exhibits generally good vitality and viability.

7.12 A range of consumer surveys were conducted as part of this study, including Business, Household and Shopper surveys. Respondents were asked a range of questions relating to the range of retail and other services provided in Buckie town centre.

Table 43: Buckie- Diversity of Uses- Survey Responses

Question	Business Survey	Householder Survey	Shopper Survey
Range of shopping	Adequate	Adequate	Adequate
Range of other services for personal business (e.g. banks, building societies, estate and travel agents)	Good	Good	Very Good
Provision of other facilities and services (e.g. Council services, leisure or sports facilities)	Adequate	Adequate	Adequate
Range of places for entertainment (e.g. including eating out/ cinema etc.)	Poor	Poor	Poor

Retailer Representation

7.13 There are 9 national (Scottish/UK) multiples in the town centre out of a total of 42 retail goods shops (retail services are excluded from this analysis) – that is 21%. This figure is comparable to other centres such as Peterhead (22%) and Inverurie (26%).

7.14 3 units (7%) were identified to be charity shops – this is comparable to both Forres and Keith (6%).

Vacancy Rate

7.15 *Table 42* above indicates that the number of vacant units identified by Moray Council planning staff was 4, which is a vacancy rate of 5.8%- which is significantly lower than Keith (9.1%); Forres (8.2%); and Lossiemouth (13.3%).

7.16 Floorspace data obtained from the Regional Assessor indicates that there is approximately 453 sqm of vacant floorspace in Buckie town centre. There is approximately 44.4 m of vacant retail frontage in the town centre (figure obtained by scaling off OS-base plans). This figure equate to approximately 4.4% 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 an indicator of the impact that vacancies have on the appearance and feel of Buckie centre, since this is what most shoppers in the centre will be aware of.

Retailer Intentions

7.17 There was an 18% response rate to the Buckie Business Survey. Similar to the Keith survey, 100% of respondents to the Buckie survey suggested that they intend to maintain their business in Buckie town centre over the next 5 years. A higher proportion of retailers (67%) indicate that they intend to invest in their business over the next 5 years. This investment is expected to range from £3,000 to £100,000.

7.18 A smaller proportion (22%) of retailers indicated that they were actively seeking a new premise within the town centre, and the reasons for doing so include; needing bigger premises to expand; and requiring more space to store stock.

7.19 Respondents were asked to indicate how business has changed for the whole of the town centre over the past three years, -the majority of respondents felt it had 'Remained About the Same'.

7.20 Respondents were asked to estimate how they expected their business turnover to change in the next three years. Analysis of the results suggests that retailers are forecasting 8.6% growth in turnover over the next three years.

7.21 Further analysis of survey data identified what existing retailers view as the major strengths of Buckie town centre, and includes the following:

- Compact town centre;
- Good variety of shops;
- Range of independent shops;
- Clean environment;
- Friendly shopkeepers;
- Ample free car parking; and
- Vibrant local community who shop locally.

Rent and Yield

7.22 There is no published retail rental and yield values for Buckie town centre and the local agents contacted did not hold information in this regard.

Turnover

7.23 Based on the information in the strategic retail model, turnover rates are close to the average for type of centre. It is estimated that the total turnover for all retail goods shops in Buckie town centre is currently £17.47m: that is £9.53m for convenience shops; £6.56m for general comparison; and £1.36m for bulky goods.

Accessibility

7.24 There are a number of bus services which connect the town to neighbouring centres and smaller settlements as well as national coach services. There are several car parks in Buckie with 340 spaces provided in Council run car parks as well as some on street parking in the town centre. *Table 44* below summarises the number of public car parking spaces provided in Buckie.

Table 44: No. of Car Parking Spaces in Buckie

	No. of Spaces (surveyed 16/09/2010)								
Car Park	**Car**	**Disabled**	**Parent & Child**	**M/C**	**Bus**	**Taxi**	**Lorry**	**Cycle**	**Pay & Display**
Cluny Place	67	6							
Cluny Square	62	5		1					
Great Eastern Road	20	1							
Buckie Drifter	38	2							
Marine Place	20	2							
Newlands Lane	76	5							
North Pringle Street	34	1							

7.25 Consumer survey respondents were asked to rate car parking provision; cost of parking; ease of travel by public transport and ease of travel by private car in Buckie town centre. The results of the surveys are set out below.

Table 45: Buckie- Accessibility- Survey Responses

Question	Business Survey	Householder Survey	Shopper Survey
Car Parking Provision	Adequate	Good	Poor
Cost of Car Parking	Good	Good	Very Good
Ease of Travel by Public Transport	Adequate	Good	Good
Ease of Travel by Private Car	Good	Good	Very Good

Environmental Quality

7.26 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.

7.27 According to the most recent LEAMS report, Buckie town centre scored a Grade A for cleanliness.

7.28 The respondents to the household, shopper and business surveys were asked to rate the overall environmental quality of Buckie town centre, the results of which are set out below.

Table 46: Buckie- Environmental Quality-Survey Responses

Question	Business Survey	Householder Survey	Shopper Survey
Overall Environment Quality of Buckie Town Centre	Good	Good	Good

Tourism

7.29 The findings of the Diversity of Uses surveys, undertaken by Moray Council staff, found there is one hotel and a range of cafes in Buckie town centre. The Fishing Heritage Centre is located outwith the defined town centre boundary. The 'picturesque' and clean environment of Buckie centre was commented upon by a number of the respondents to the Buckie business survey as being a strength of the town.

7.30 Consumer survey respondents were asked to rate facilities and attractions for tourist provided in Buckie town centre, the results of which are set out below.

Table 47: Buckie- Tourism- Survey Responses

Question	Business Survey	Householder Survey	Shopper Survey
Facilities and attractions for tourists	Poor	Adequate	Poor

Crime and Safety

7.31 Crime statistics for the Buckie Inspectorate Area are provided above in Paragraph 6.29, *Table 37.*

7.32 The consumer survey respondents were asked to rate both safety (from vehicles and traffic) and crime levels in Buckie town centre, the results of which are outlined below:

Table 48: Buckie- Crime and Safety- Survey Responses

Question	Business Survey	Householder Survey	Shopper Survey
Safety (from vehicles and traffic)	Adequate	Adequate	Good
Crime levels	Adequate	Good	Good

Buckie Town Centre Health Check Summary

7.33 The low level of vacancy and diverse retail offer of Buckie indicates that the town centre is performing well. It is notable that the area has 33 comparison goods retail units (4,873 sqm); 9 convenience outlets (3,685 sqm); and 14 retail service units (989 sqm). 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.

7.34 The number of vacant units identified by Moray Council planning staff was 4, which is a vacancy rate of 5.8%- which is significantly lower than Keith (9.1%); Forres (8.2%); and Lossiemouth (13.3%).

7.35 Based on the information in the strategic retail model, turnover rates are close to the average for type of centre. It is estimated that the total turnover for all retail goods shops in Buckie town centre is currently £17.47m: that is £9.53m for convenience shops; £6.56m for general comparison; and £1.36m for bulky goods. 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 2nd (between 10.00 and 13.15) and Saturday 4th September 2010 (between 14.00 and 17.15). Pedestrian footfall data was collected at 2 positions throughout the town. Full details of the survey locations are provided below.

Table 49: Details of Lossiemouth Footfall Survey

Enumeration Point	Location
A	No. 24 Pitgavney Quay- (Harbour Treasures)
B	No. 15 Clifton Road- (Rizza's Ices)

8.2 Of the two locations, the position opposite Rizza's Ices (Point B) recorded the busiest footfall with an average hourly figure of 268.8 persons on the Thursday and 624 persons on the Saturday. It is notable that the weather conditions were very favourable on both count days, with temperatures ranging from 16-18 degrees Celsius. The significant increase in the Saturday count can also be attributed to the occurrence of the Lossiemouth Wall of Rock Music event, which took place on Pitgavney Street adjacent to Marina Quay, on the 3rd and 4th September.

8.3 The lowest pedestrian flow count in the town centre was recorded at the Pitgavney Quay, - opposite Harbour Treasures (Point A), with an average hourly figure of 129.6 persons on the Thursday and 265.3 persons on the Saturday.

8.4 An overview of the average hourly flows (together with 95% confidence limits) recorded on both Thursday 2nd and Saturday 4h September are summarised in *Charts 11* and *12* below.

Chart 11: Lossiemouth- Hourly Pedestrian Flows- Thursday 2nd September 2010

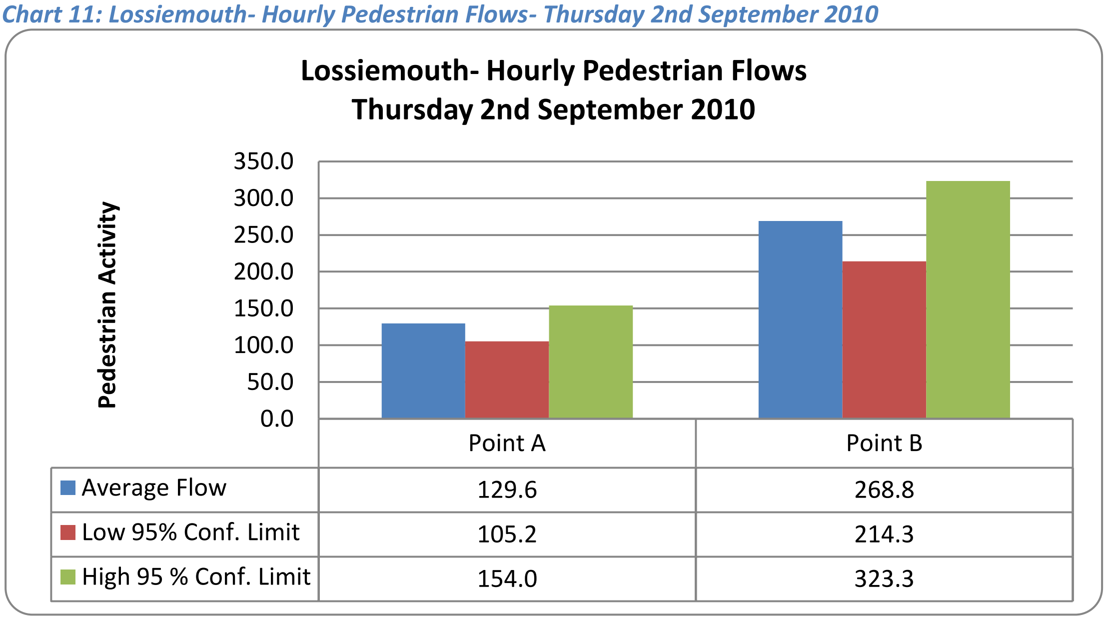
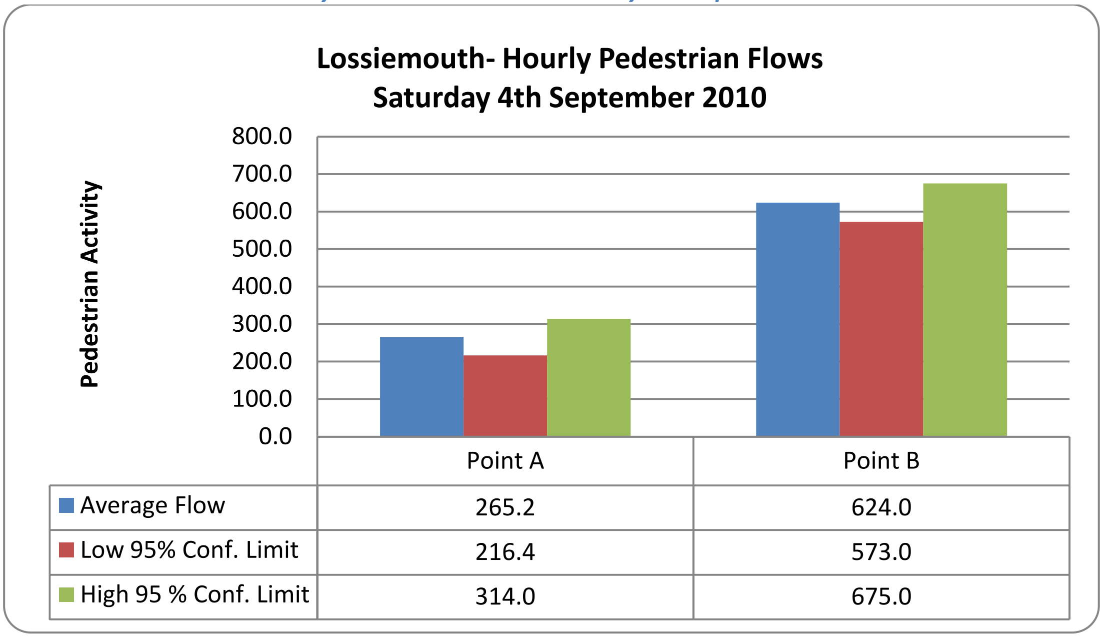


Chart 12: Lossiemouth- Hourly Pedestrian Flows- Saturday 4th September 2010



8.5 Analysis of the weekday count revealed that overall, pedestrian flow was lowest during the 10.00 to 10.55 period and increased significantly to 36.5% between 11.00 and 11.55. Further details of the weekday Time of Day Analysis is illustrated in *Table 50* below.

Table 50: Lossiemouth Footfall- Time of Day Analysis- Thursday 2nd September 2010

	Enumeration Point	10.00-10.55	%	11.00-11.55	%	12.00-12.55	%
A	No. 24 Pitgavney Quay- (Harbour Treasures)	28	29.2%	36	37.5%	32	33.3%
B	No. 15 Clifton Road- (Rizza's Ices)	58	29.4%	71	36.0%	68	34.5%
	Total	86	**29.4%**	107	**36.5%**	100	**34.1%**

8.6 Analysis of the Saturday count revealed that 33.4% and 34.8% of the overall footfall occurred between the periods 14.00 to 14.55 and 15.00 to 15.55 respectively. The overall total flow decreased to 31.8% during the period 16.00 to 16.55. Further details of the Time of Day Analysis recorded on Saturday 4th[th] September is illustrated in *Table 51* below.

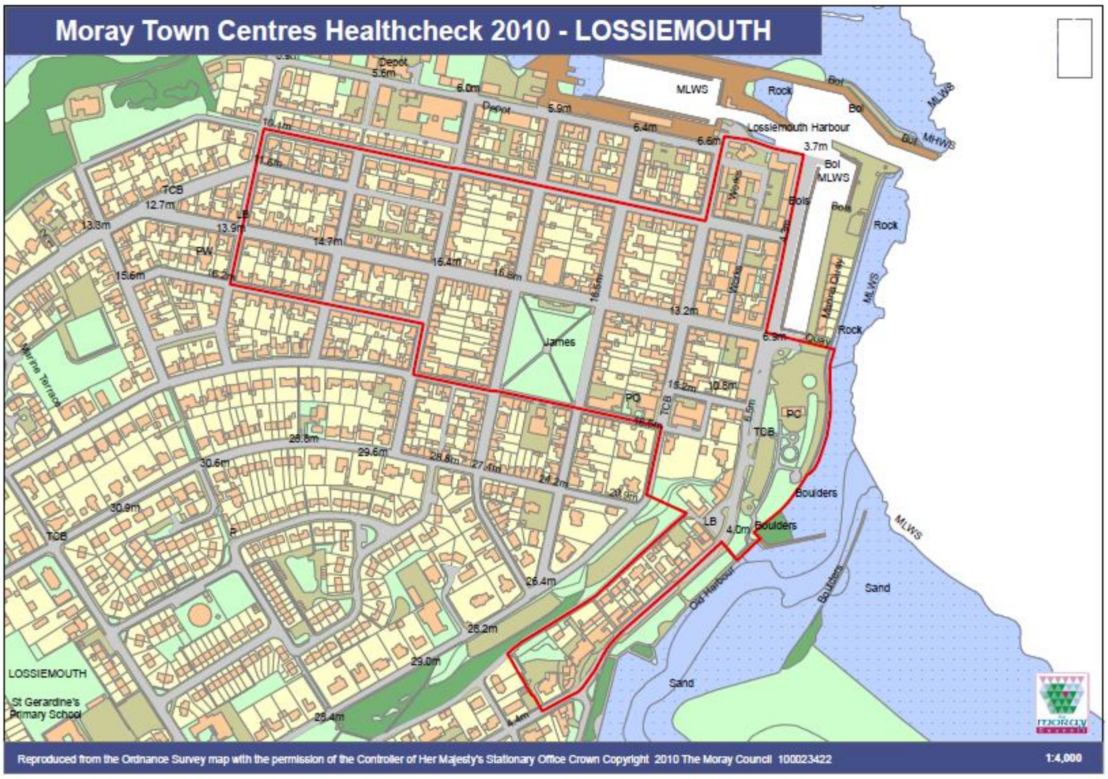
Table 51: Lossiemouth Footfall- Time of Day Analysis- Saturday 4th September 2010

	Enumeration Point	14.00-14.55	%	15.00-15.55	%	16.00-16.55	%
A	No. 24 Pitgavney Quay- (Harbour Treasures)	78	38.2%	73	35.8%	53	26.0%
B	No. 15 Clifton Road- (Rizza's Ices)	150	31.3%	165	34.4%	164	34.2%
	Total	228	**33.4%**	238	**34.8%**	217	**31.8%**

Diversity of Uses

8.7 Lossiemouth does not contain a defined 'town centre', however a map of the study area can be found below (*Map 4*). Lossiemouth centre accommodates a range of retail facilities that are discussed below. In addition to retailing the centre is also a popular destination for tourists with certain buildings offering tourist attractions, including the Fishery Museum and Warehouse Theatre on Pitgavney Quay.

Map 4: Lossiemouth Study Area



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

Table 52: Lossiemouth- Diversity of Uses

Summary of Lossiemouth Diversity of Uses Survey (July 2010)		
Type of Use	**No. of Outlets**	**Floorspace (sqm)**
Comparison	11	2048
Convenience	8	669
Retail Service	8	687
Leisure Service	18	2167.2*
Financial & Business Service	3	431
Health & Medical	2	94.2
Public Service	2	1106
Religious Service	0	762.5
General Office Use	0	799.4
Vacancy	6	410
Total	**58**	**9,174.3**
Note: *The Regional Assessor does not hold floor space data for Hotels and Public House premises		

8.9 Consumer survey respondents were asked a range of questions relating to the range of retail and other services provided in Lossiemouth town.

Table 53: Lossiemouth- Diversity of Uses- Survey Responses

Question	Business Survey	Householder Survey	Shopper Survey
Range of shopping	Poor	Poor	Poor
Range of other services for personal business (e.g. banks, building societies, estate and travel agents)	Adequate	Adequate	Good
Provision of other facilities and services (e.g. Council services, leisure or sports facilities)	Poor	Adequate	Adequate
Range of places for entertainment (e.g. including eating out/ cinema etc.)	Poor	Adequate	Adequate

Retailer Representation

8.10 There are 2 national (Scottish/UK) multiples in the town out of a total of 19 retail goods shops (retail services are excluded from this analysis) – that is 11%. This figure is significantly lower than the other towns in Moray.

Vacancy Rate

8.11 *Table 52* above indicates that the number of vacant units identified by Moray Council planning staff was 6, which is a vacancy rate of 13.3%- which is above the average trend for Scotland.

8.12 Floorspace data obtained from the Regional Assessor indicates that there is approximately 410 sqm of vacant floorspace in the Lossiemouth study area. There is approximately 51.8 m of vacant retail frontage in the town centre (figure obtained by scaling off OS-base plans).

Retailer Intentions

8.13 There was a 22 % response rate to the Lossiemouth Business Survey. The majority of survey respondents (60%) suggested that they intend to maintain their business in Lossiemouth town over the next 5 years. 40% of respondents indicate that they expect to invest in their business over the next five years, with the anticipated level of investment ranging from £5,000 to £10,000, which will be invested in shop front improvements and new equipment.

8.14 The majority of respondents are not actively seeking a new premise within the town.

8.15 Respondents were asked to indicate how business has changed for the whole of the town over the past three years. The majority of respondents felt it had 'Declined Slightly'. Respondents were asked to elaborate on reason for this change, and the following causes were cited:

- People now go elsewhere to shop;
- No development;

- Potential closure of RAF Lossiemouth;
- "Fishing boats are gone".

8.16 Respondents were asked to estimate how they expected their business turnover to change in the next three years. Analysis of the results suggests that retailers are forecasting 7% decline in turnover over the next three years.

8.17 Further analysis of the survey data identified what existing retailers view as the major strengths of Lossiemouth town centre, and includes the following:

- "Loyal customer base (however this is declining)";
- Beautiful scenery attracts people;
- Proximity to beaches;
- Clean environment;
- Free parking;
- Development of harbour area;
- Diverse range of businesses on offer.

Rent and Yield

8.18 There is no published retail rental and yield values for Lossiemouth town and the local agents contacted did not hold information in this regard.

Turnover

8.19 According to the analysis of the retail model, Lossiemouth centre had an estimated annual retail goods turnover in the region of £5.16m in 2010. Of this total, £2.46m was derived from convenience shops; £1.18m for general comparison; and £1.52m for bulky goods.

Accessibility

8.20 Although there is no railway station within the town, there is fairly good bus and coach provision. There are frequent services connecting the town to the nearby centres including Elgin. This journey takes just twenty minutes and is operated by Stagecoach Monday to Saturday, with a reduced service on Sunday. Nevertheless, a good frequency is maintained.

8.21 Although much of the parking provision is located on the main commercial streets, there is a small parking provision on Pitgavney Street, where parking is free of charge. *Table 54* below summarises the number of car parking spaces provided in Lossiemouth centre.

Table 54: No. of Car Parking Space in Lossiemouth

	No. of Spaces (surveyed 16/09/2010)								
Car Park	**Car**	**Disabled**	**Parent & Child**	**M/C**	**Bus**	**Taxi**	**Lorry**	**Cycle**	**Pay & Display**
Pitgavney Street	8	1							

8.22 A range of consumer surveys were conducted as part of this study, including Business, Household and Shopper surveys. Respondents were asked to rate car parking provision; cost of parking; ease of travel by public transport and ease of travel by private car in Lossiemouth town. The results of the surveys are set out below.

Table 55: Lossiemouth- Accessibility- Survey Responses

Question	Business Survey	Householder Survey	Shopper Survey
Car Parking Provision	Adequate	Good	Good
Cost of Car Parking	Good	Good	Very Good
Ease of Travel by Public Transport	Adequate	Adequate	Good
Ease of Travel by Private Car	Good	Good	Good

Tourism

8.23 The findings of the Diversity of Uses surveys, undertaken by Moray Council staff, found there is 1 hotel and 3 restaurants located within Lossiemouth centre. There are also two caravan and several B&Bs located outwith 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. The Lossiemouth Folk Festival occurs in mid July, and the Raft Race takes place in late August.

8.24 Survey respondents were asked to rate facilities and attractions for tourists provided in Lossiemouth, the results of which are set out below.

Table 56: Lossiemouth- Tourism- Survey Responses

Question	Business Survey	Householder Survey	Shopper Survey
Facilities and attractions for tourists	Poor	Good	Good

Crime and Safety

8.25 Crime statistics obtained from the '*Moray Division Public Performance Report Quarter 1 2009/2010'* provide a measure of the number of crimes and offences that can be considered as antisocial behaviour and impact on local communities. Caution should be used when interpreting these results as the Lossiemouth Inspectorate area, includes Lossiemouth, Hopeman, Burghead, Lhanbryde, Fochabers and the rural areas around these towns.

Table 57: Lossiemouth- Recorded Crime

	Recorded Crime in Moray	Recorded Crime in Lossiemouth
Recorded- Moray Division	**Q1 09/10**	**Q1 09/10**
Disregard for community/ personal wellbeing	491	61
Acts directed at people	43	6
Environmental damage	340	62
Misuse of public space	2	0
Total	**876**	**129**

8.26 Consumer survey respondents were asked to rate both safety (from vehicles and traffic) and crime levels in Lossiemouth centre, the results of which are outlined below.

Table 58: Lossiemouth- Crime and Safety- Survey Responses

Question	Business Survey	Householder Survey	Shopper Survey
Safety (from vehicles and traffic)	Adequate	Good	Good
Crime levels	Adequate	Good	Good

Lossiemouth Centre Health Check Summary

8.27 There are few multiple retailers and independents predominate in Lossiemouth. In addition to retailing the centre is also a popular destination for tourists with a 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. Most higher order comparison goods shopping trips are attracted to the larger centre of Elgin. There are 2 national (Scottish/UK) multiples in the town out of a total of 19 retail goods shops (retail services are excluded from this analysis) – that is 11%. This figure is significantly lower than the other towns in Moray.

8.28 The number of vacant units identified by Moray Council planning staff was 6, which is a vacancy rate of 13.3%- which is above the average trend for Scotland.

8.29 According to the analysis of the retail model, Lossiemouth centre had an estimated annual retail goods turnover in the region of £5.16m in 2010. Of this total, £2.46m was derived from convenience shops; £1.18m for general comparison; and £1.52m for bulky goods.

8.30 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; Vacancy Rates; and Turnover.

Diversity of Uses

9.2 The overall mix of uses and the quantum of floorspace they occupy is summarised in the table below. It is notable that Dufftown has 21 Leisure Service outlets (e.g. restaurants, cafes, hotels and guesthouses etc.), compared to 8 in Aberlour, 7 in Fochabers and 8 in Rothes. This illustrates the importance of tourism to the centre.

9.3 Other than specialist stores, such as the kilt shop in Dufftown, the main-stream comparison retail range in these smaller settlements is very limited with few fashion retailers. Because of the predominance of independent retailers, some shops have irregular opening hours.

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 McColls outlet, a small bakery and a butcher shop.

9.5 Given the scale of these settlements, they are well represented by Financial Services (e.g. retail banks), with 2 retail banks located Aberlour, 1 in Dufftown and 2 in Fochabers. Rothes does not contain a financial institution.

Table 59: Aberlour- Diversity of Uses

Summary of Aberlour Diversity of Uses Survey (July 2010)		
Type of Use	**No. of Outlets**	**Floorspace (sqm)**
Comparison	7	851
Convenience	5	507
Retail Service	5	323.5
Leisure Service	8	368*
Financial & Business Service	2	233.4
Health & Medical	1	212.1
Public Service	2	584.1
Religious Service	1	450.5
General Office Use	1	35.8
Vacancy	0	0
Total	**32**	**3,565.4**
Notes: *The Regional Assessor does not hold floor space data for Hotels and Public House premises		

Table 60: Dufftown- Diversity of Uses

Summary of Dufftown Diversity of Uses Survey (July 2010)		
Type of Use	**No. of Outlets**	**Floorspace (sqm)**
Comparison	8	297
Convenience	6	769
Retail Service	3	87
Leisure Service	21	1898*
Financial & Business Service	2	180
Health & Medical	0	0
Public Service	1	83
Religious Service	0	0
General Office Use	0	0
Vacancy	3	26.**
Total	**44**	**3,340**
Notes: *The Regional Assessor does not hold floor space data for Hotel premises **Floorspace data for 10 Conval Street & premises on Fife street (formerly McCANDISH NEWSAGENTS) is not available- site inspection found these premises were vacant		

Table 61: Fochabers- Diversity of Uses

Summary of Fochabers Diversity of Uses Survey (July 2010)		
Type of Use	**No. of Outlets**	**Floorspace (sqm)**
Comparison	9	724
Convenience	6	725
Retail Service	3	118
Leisure Service	7	118*
Financial & Business Service	3	422
Health & Medical	2	39**
Public Service	3	644
Religious Service	1	864
General Office Use	0	0
Vacancy	0	0
Total	**34**	**3,654**
Notes: *The Regional Assessor does not hold floor space data for Hotel premises **Floorspace data for the medical centre at 12 High Street is unavailable		

Table 62: Rothes- Diversity of Uses

Summary of Rothes Diversity of Uses Survey (July 2010)		
Type of Use	**No. of Outlets**	**Floor space (sqm)**
Comparison	1	61
Convenience	4	751
Retail Service	4	259
Leisure Service	8	104.8*
Financial & Business Service	2	161
Health & Medical	0	0
Public Service	3	**
Religious Service	1	429
General Office Use	2	94
Vacancy	2	Data Unavailable
Total	**27**	**1,859.8**
Notes: *The Regional Assessor does not hold floor space data for Hotel premises **Floorspace data unavailable		

Retailer Representation

9.6 The overall number and percentage of national multiples (Scottish/UK) identified in the centres of Aberlour, Dufftown, Fochabers and Rothes are summarised below.

Table 63: Smaller Settlements- Retailer Representation

Town	Aberlour	Dufftown	Fochabers	Rothes
Total Retail Goods Shops*	12	14	15	5
No. of National Multiples	1 (8%)	1 (7%)	2 (13%)	2 (40%)
Note: * Retail services are excluded from this analysis				

Vacancy Rate

9.7 The overall number and percentage of vacant outlets identified in the centres of Aberlour, Dufftown, Fochabers and Rothes are set out overleaf. The vacancy rate in Rothes (surveyed July 2010) was 11.8%, which is above the current Scottish average of 10%. It is noteworthy, that there were no vacant premises in either Aberlour or Fochabers. Dufftown has a 7.9% vacancy rate which is below the current Scottish average of 10%.

Table 64: Smaller Settlements- Vacancy Rates

Town Centre	Total no. of Shops*	No. of Vacant Retail Outlets**	% of Vacant Outlets	Vacant Floorspace (sqm)	Approximate Length of Vacant Retail Frontage (Meters)
Aberlour	25	0	0.0%	0	0
Dufftown	38	3	7.9%	26***	24.9
Fochabers	25	0	0.0%	0	0
Rothes	17	2	11.8%	Data Unavailable	22.9

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

Turnover

9.8 Spending generated by residents on convenience and comparison items in centres and stores in Moray represents retail turnover. Data has been obtained from a review of the strategic retail model, undertaken by Hargest Planning Ltd, as part of the wider health check study. Please find below, a table summarising retail turnover data for Aberlour, Dufftown, Fochabers and Rothes.

Table 65: Smaller Settlements- Retail Turnover

Location	Convenience Turnover (m)	General Comparison Turnover (m)	Bulky Goods Turnover (m)	Total Turnover (m)
Aberlour	£1.4	£1.15	-	£2.55
Dufftown	£1.31	£0.33	-	£1.64
Fochabers	£1.73	£1.01	-	£2.75
Rothes	£1.31	£0.08	-	£1.39
Others/ Local/ Rural	£34.28	£9.42	£11.17	£54.87
Total	**£49.77m**	**£11.99m**	**£11.17m**	**£63.2m**

Smaller Settlements Health Check Summary

9.9 It is notable that Dufftown has 21 Leisure Service outlets (e.g. restaurants, cafes, hotels and guesthouses etc.), compared to 8 in Aberlour, 7 in Fochabers and 8 in Rothes. This illustrates 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, a small bakery and a butcher shop. Given the scale of these settlements, they are well represented by Financial Services (e.g. retail banks), with 2 retail banks located Aberlour, 1 in Dufftown and 2 in Fochabers. Rothes does not contain a financial institution.

9.10 The vacancy rate in Rothes (surveyed July 2010) was 11.8%, which is above the current Scottish average of 10%. It is noteworthy, that there were no vacant premises in either Aberlour or Fochabers. Dufftown has a 7.9% vacancy rate which is below the current Scottish average of 10%.

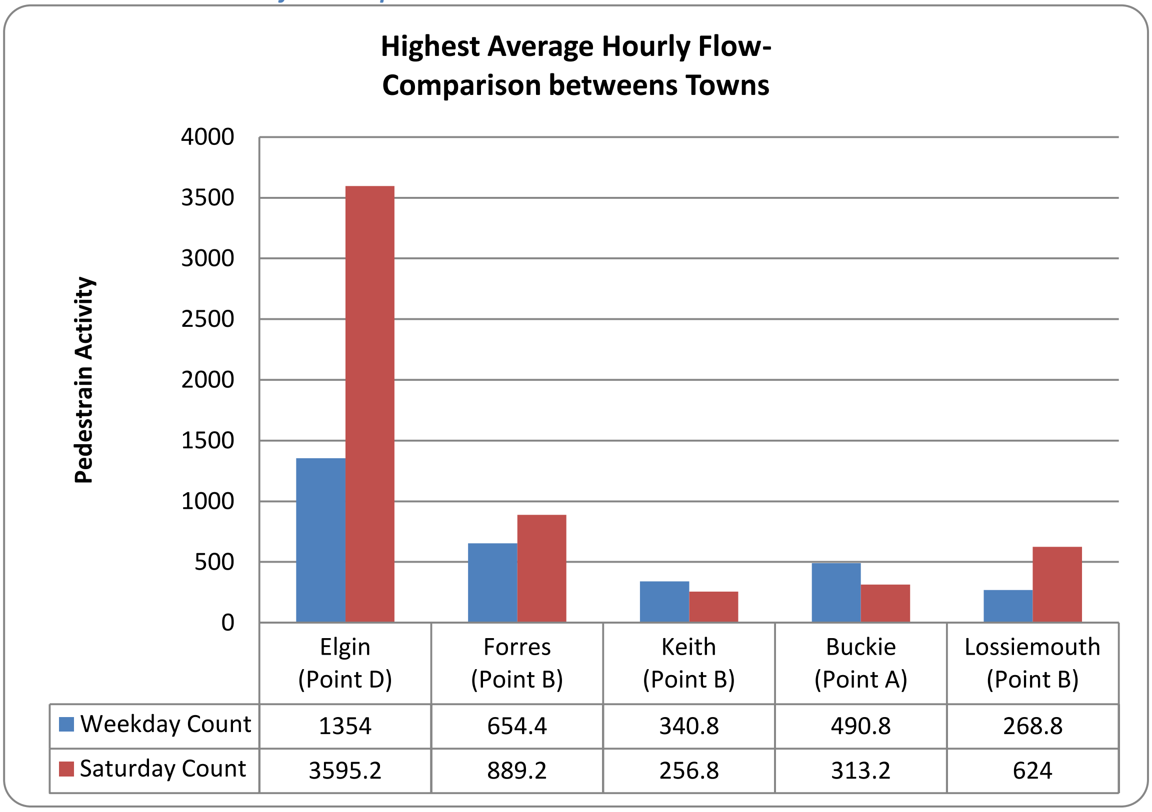
10. Comparative Centres

Pedestrian Footfall

10.1 Pedestrian flow counts were undertaken in accordance with the recommendations of the *Town Centre and Retailing Methodologies* 2007 report.

10.2 *Chart 13* 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 13: Pedestrian Footfall- Comparison between Towns



10.3 As illustrated by *Chart 13* above, the highest pedestrian volumes were recorded in Elgin. For example, the highest average hourly flow was recorded at Point D on both the weekday (1354 pedestrians) and Saturday counts (3595 pedestrians). There was a significant increase in pedestrian activity in Elgin during the Saturday count- however, this may be attributed to the occurrence of the Farmer's Market on the Plainstones, and improved weather conditions compared to the weekday count.

10.4 The lowest overall footfall activity was recorded in Keith, where the highest average hourly flow was recorded at Point B on both the weekday (340.8 pedestrians) and Saturday counts (256.8 pedestrians).

10.5 Pedestrian activity in Lossiemouth increased from an average flow of 268.8 pedestrians during the weekday count, to 624 during the Saturday count. However, weather conditions were very favourable on during the Saturday count, with sunny conditions and temperatures ranging from 16 to 18 degrees Celsius. The significant increase in the Saturday count can also be attributed to the occurrence of the Lossiemouth Wall of Rock Music event, which took place on Pitgavney Street adjacent to Marina Quay, on the 3rd and 4th September.

Diversity of Uses

10.6 Table 66 below summarises the main uses within the centres of Elgin (including Edgar Road); Forres; Keith; Buckie; and Lossiemouth.

Table 66: 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)
Comparison	98	22296	15	18432	34	4701	24	4949	33	4873	11	2048
Convenience	24	17471	2	12438	12	2269	11	1353	9	3685	8	669
Retail Services	44	4676	0	0	17	1316	12	722.5	14	989	8	687
Leisure Services	70	16419	1		22	1469*	19*	1360*	13	1283*	18	2167.2*
Financial & Business Services	46	6564	0	0	14	3741	11	1209	17	1797	3	431
Vacancies	15	2722	9	6878	7	2274	6	765*	4	453	6	410
Total	**297**	**70,148**	**27**	**37748**	**106**	**15,770**	**83**	**10,358.5**	**90**	**13,080**	**54**	**6,412.2**

Notes:
*The Regional Assessor does not hold floorspace data for certain leisure services (e.g. public houses, hotels and guesthouses).

Retailer Representation

10.7 *Table 67* 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 67: Retailer Representation- Comparison between Towns

Town	Elgin	Edgar Road	Forres	Keith	Buckie	Lossiemouth
Total Retail Goods Shops*	118	17	48	35	42	19
No. of National Multiples	49 (42%)	14(82.4%)	8 (17%)	5 (14%)	9 (26%)	2 (11%)
No. of Charity Shops	10 (8%)	0	3 (6%)	2 (6%)	3 (7%)	0 (0%)

Note:
* Retail services are excluded from this analysis

Vacancies

10.8 *Table 68* below identifies the number and percentage of vacant units in the centres of: Elgin (including Edgar Road); Forres; Keith; Buckie; and Lossiemouth.

Table 68: Vacancy Rate- 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	236	15	6.4%	2722	97.2
Edgar Road	18	9	50%	8827	153.2
Forres	85	7	8.2%	2274***	53****
Keith	66	6	9.1%	765***	76.9
Buckie	69	4	5.8%	453	44.4
Lossiemouth	45	6	13.3%	410	51.8

*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

**** Figure excludes the vacant TESCO building (approximately 92 metres vacant frontage) on Gordon Street

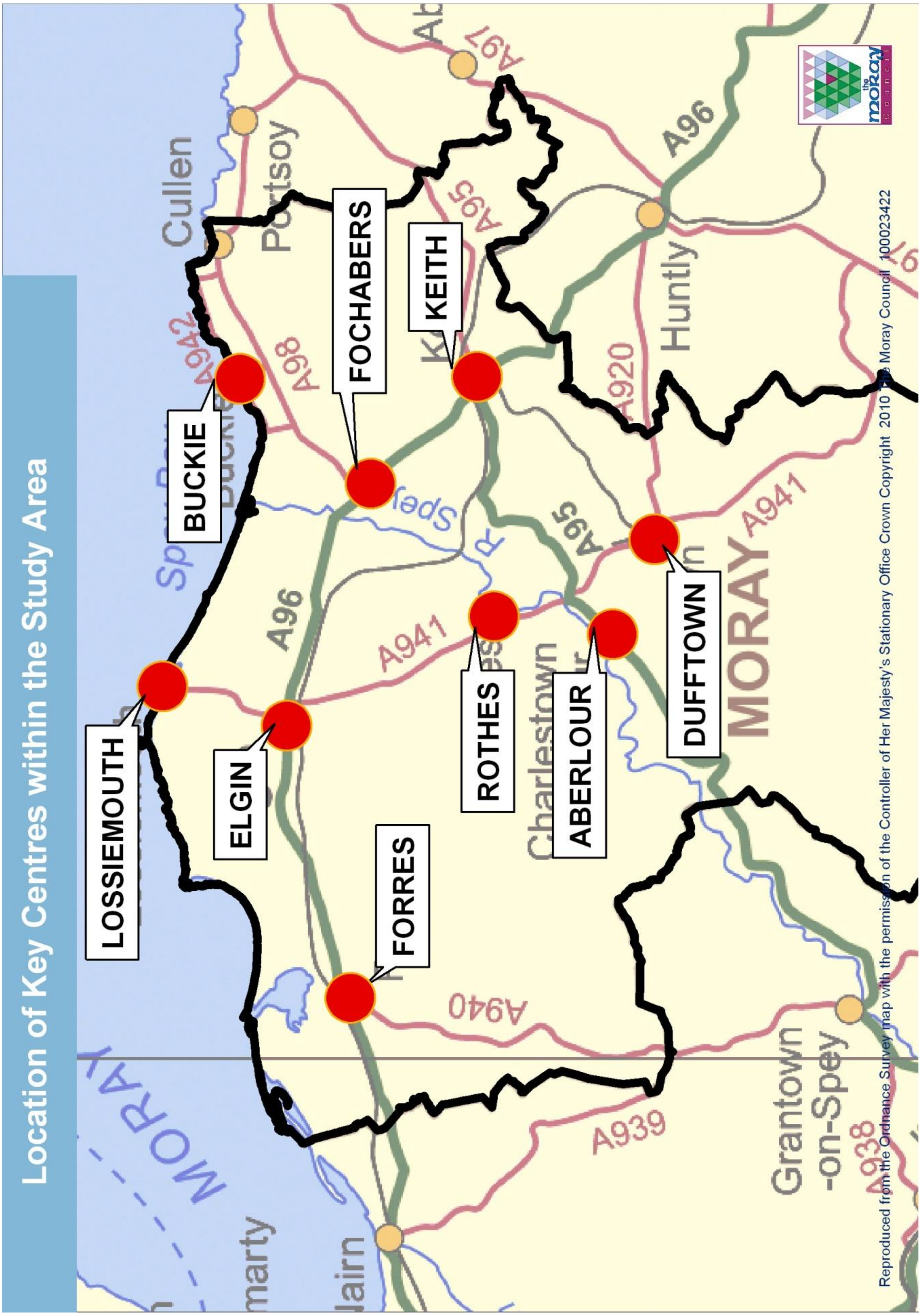
Turnover

10.9 Spending generated by residents on convenience and comparison items in centres and stores in Moray represents retail turnover. Data has been obtained from a review of the strategic retail model, undertaken by Hargest Planning Ltd, as part of the wider health check study. These figures are the estimated turnover for 2010, based on 2008 prices. Please find below, a table summarising retail turnover data for Moray.

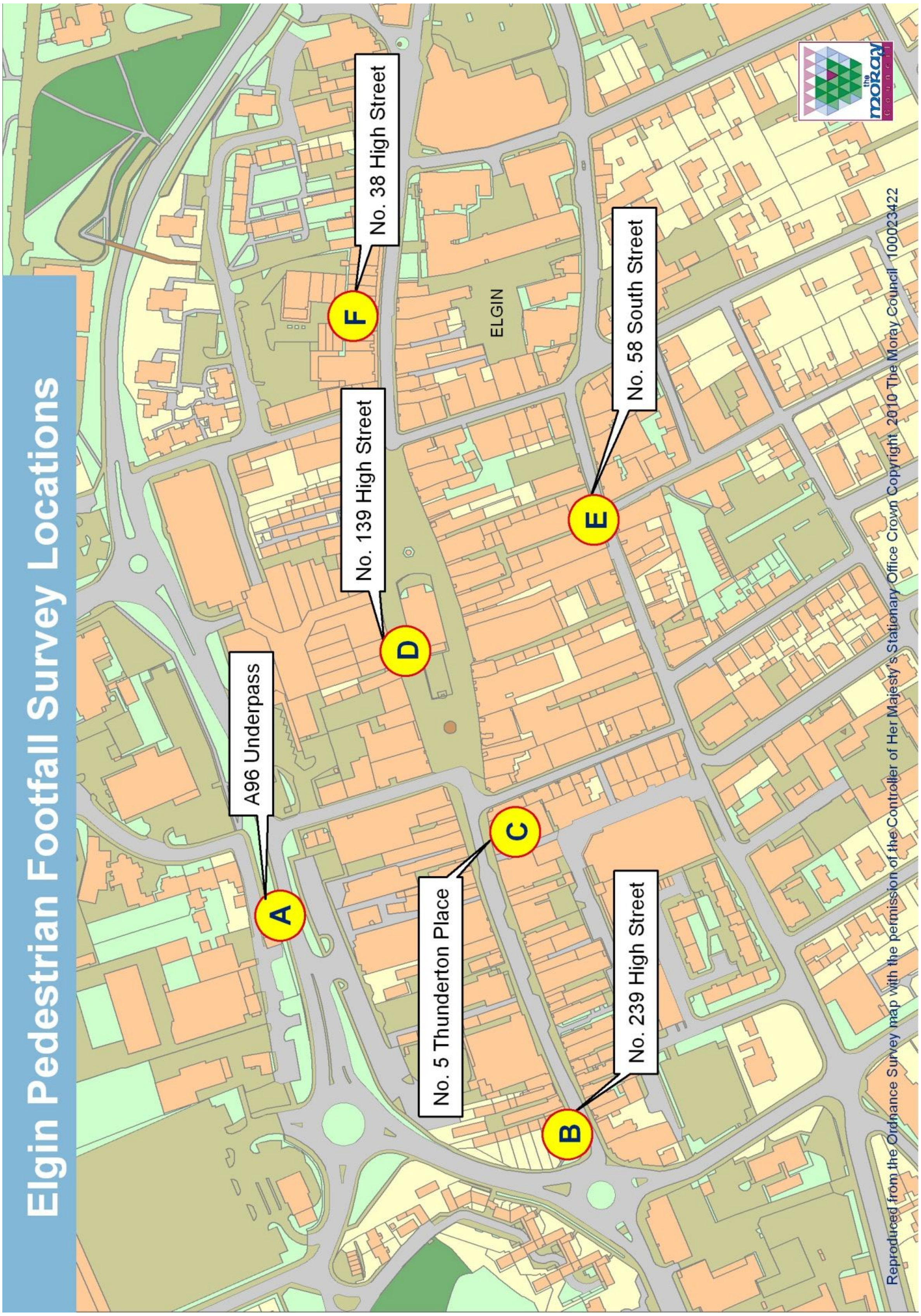
Table 69: Turnover- Comparison between Towns

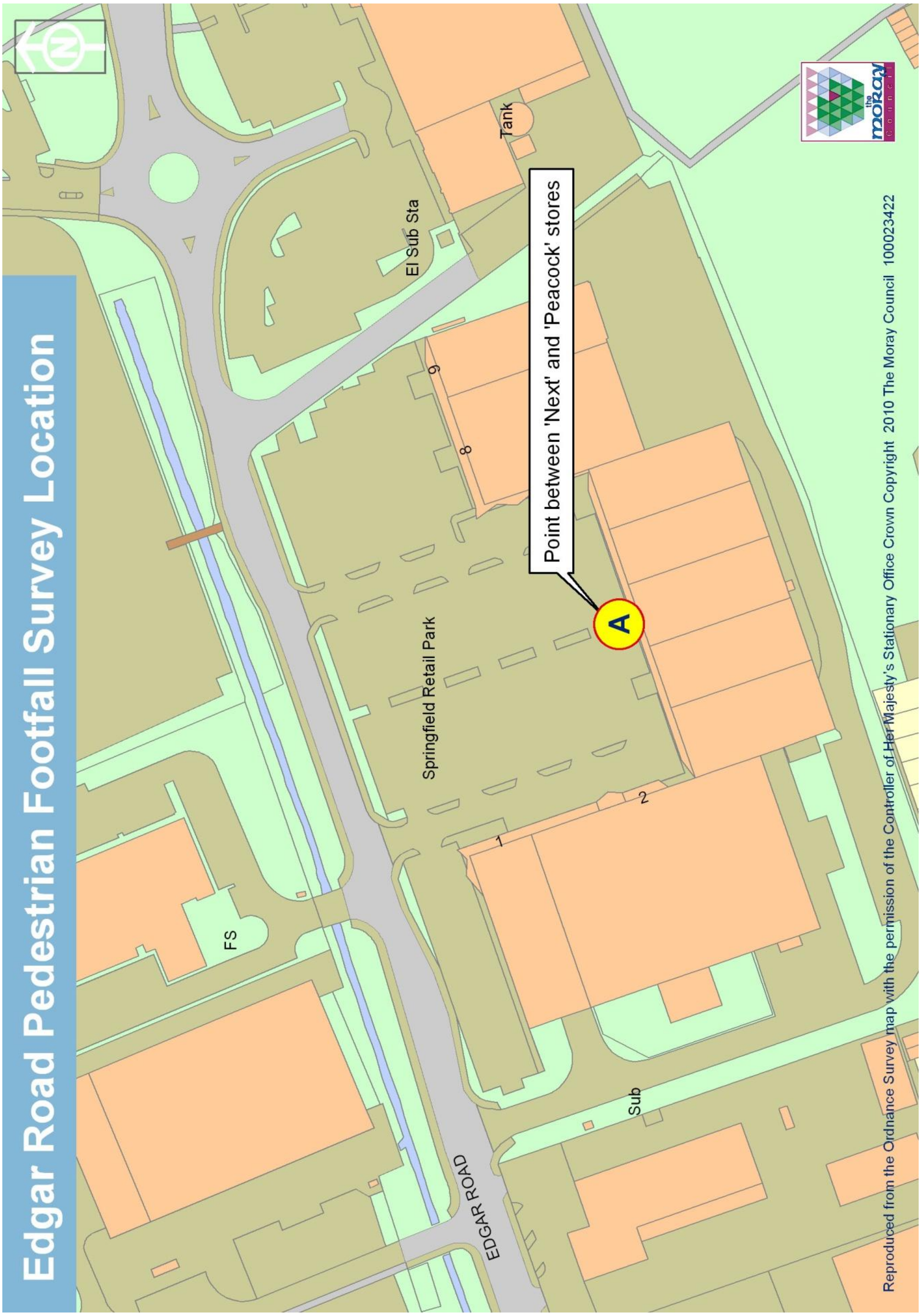
Location	Convenience Turnover	General Comparison Turnover	Bulky Goods Turnover	Total Turnover
Elgin Town Centre	£47.97m	£50.62m	£8.40m	£106.9m
Edgar Road	£45.17m	£19.19m	£22.15m	£86.52m
Buckie Town Centre	£9.53m	£6.56m	£1.36m	£17.46m
Forres Town Centre	£4.86m	£4.64m	£0.76m	£10.25m
Keith Town Centre	£2.69m	£5.02m	£1.89m	£9.6m
Lossiemouth Centre	£2.46m	£1.18m	£1.52m	£5.16m
Aberlour	£1.4m	£1.15m	-	£2.55m
Dufftown	£1.31m	£0.33m	-	£1.64m
Fochabers	£1.73m	£1.01m	-	£2.75m
Rothes	£1.31m	£0.08m	-	£1.39m
Others/Local/Rural	£34.28m	£9.42m	£11.17m	£54.87m
Total	**£152.71m**	**£99.2m**	**£47.25m**	**£299.09m**

Appendix I: Location of Key Centres



Appendix II: Plans of Footfall Survey Locations




Edgar Road Pedestrian Footfall Survey Location
N
El Sub Sta
Tank
Point between 'Next' and 'Peacock' stores
A
9
8
Springfield Retail Park
2
1
FS
Sub
EDGAR ROAD
the moray council
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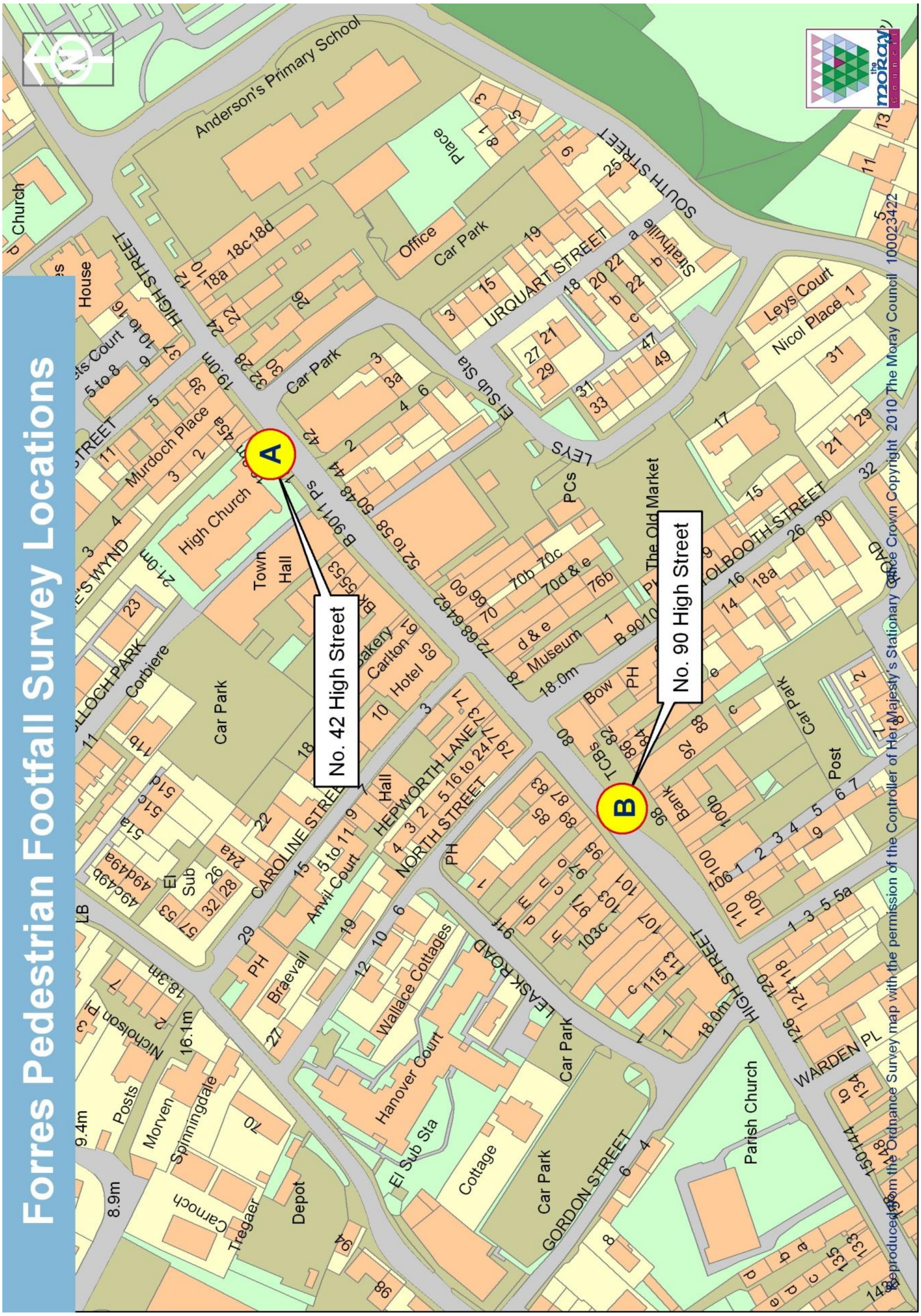
Forres Pedestrian Footfall Survey Locations
No. 42 High Street
No. 90 High Street
A
B
HIGH STREET
CAROLINE STREET
HEPWORTH LANE
NORTH STREET
LEASK ROAD
GORDON STREET
TOLBOOTH STREET
URQUART STREET
SOUTH STREET
LEYS
Anderson's Primary School
High Church
Town Hall
The Old Market
Museum
Parish Church
Car Park
Hanover Court
Wallace Cottages
Anvil Court
Murdoch Place
Leys Court
Nicol Place
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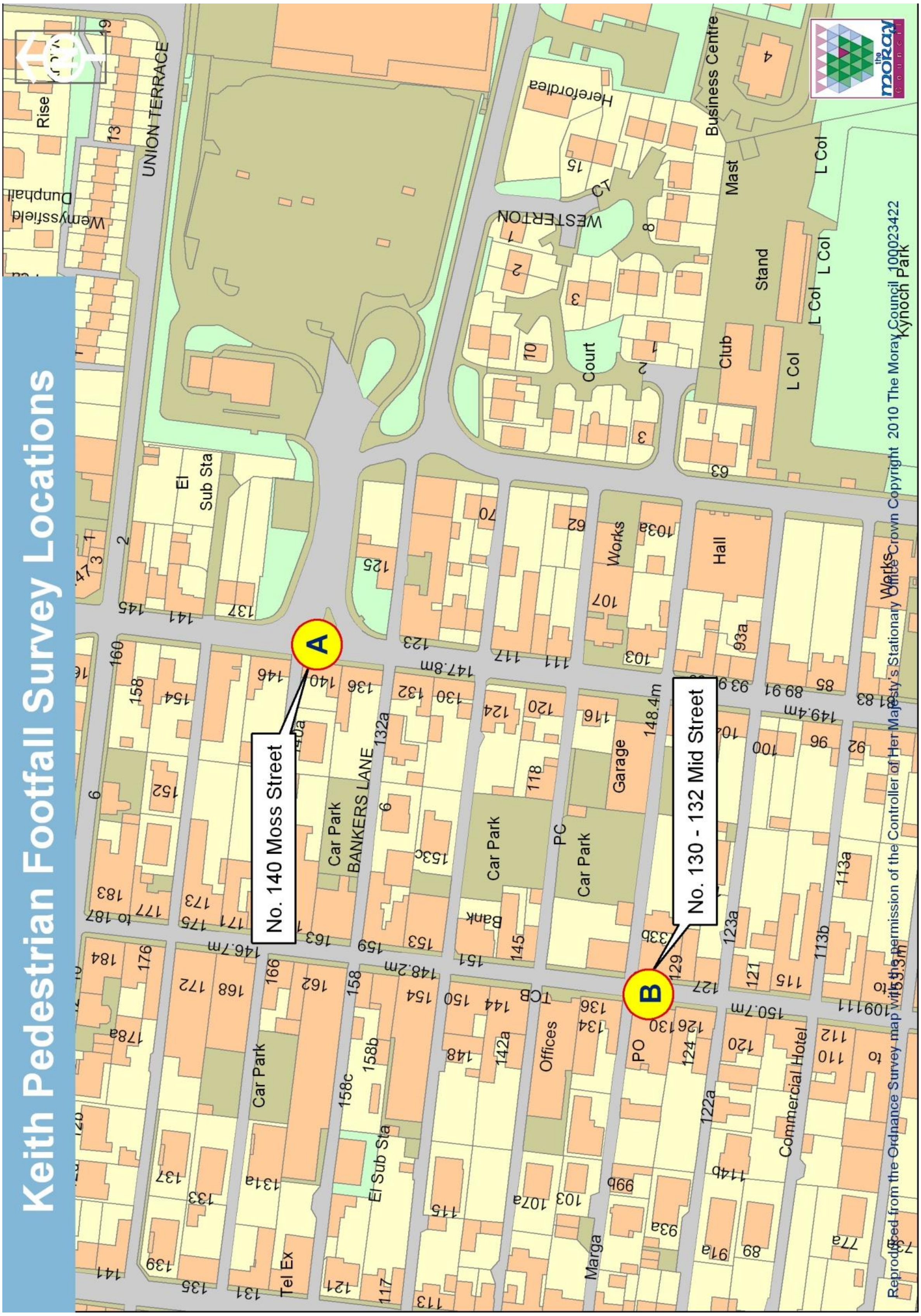
Keith Pedestrian Footfall Survey Locations
A
No. 140 Moss Street
B
No. 130 - 132 Mid Street
UNION TERRACE
BANKERS LANE
WESTERTON
Kynoch Park
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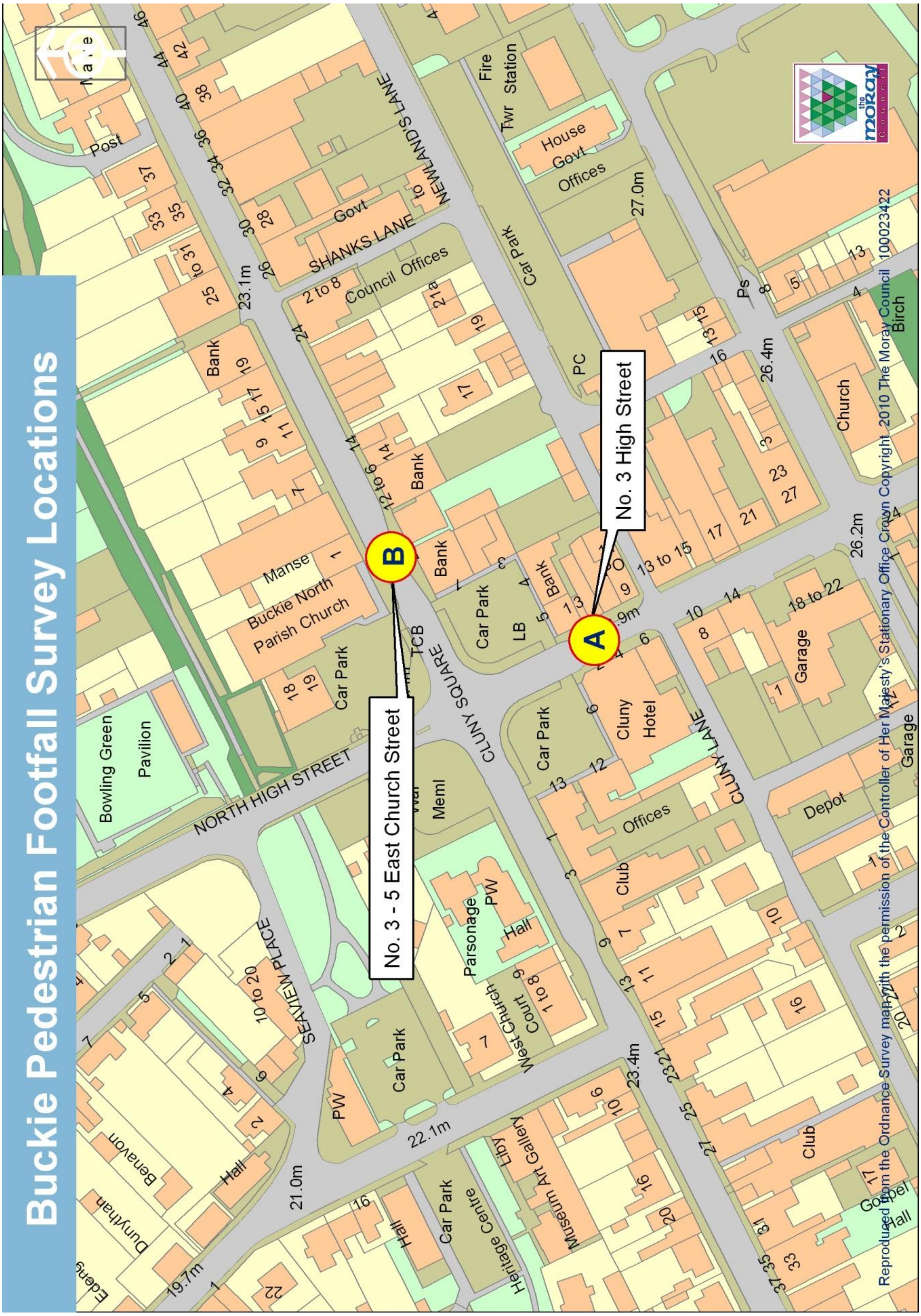
Buckie Pedestrian Footfall Survey Locations
A
No. 3 High Street
B
No. 3 - 5 East Church Street
NORTH HIGH STREET
CLUNY SQUARE
CLUNY LANE
SHANKS LANE
to NEWLANDS LANE
SEAVIEW PLACE
Buckie North Parish Church
Manse
Cluny Hotel
Council Offices
Govt Offices
Fire Station
Bowling Green
Pavilion
West Church Court
Parsonage
Museum Art Gallery
Heritage Centre
War Meml
Car Park
Bank
Church
Garage
Depot
Offices
Club
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Lossiemouth Pedestrian Footfall Survey Locations
A
No. 24 Pitgaveny Quay
B
No. 15 Clifton Road
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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

GOAD Class	GOAD Sub-Class	Primary Activity	Code
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

GOAD Class	GOAD Sub-Class	Primary Activity	Code
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