Moray Town Centre Health Check Assessment 2014

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Executive Summary

1.1 In 2014, Moray Council undertook a series of Town Centre Health Check assessments in Moray. These were in line with the framework established in 2010 with Hargest Planning Ltd. Whilst the study undertaken in 2010 was wider including a retail model and household/shopper surveys the 2014 study focuses only on a number of the key Vitality and Viability indicators. This provides a baseline of information as part of the on-going programme of health check assessments.

1.2 Assessment was undertaken in the existing town centres of Elgin, Forres, Buckie, Keith and Lossiemouth. The Edgar Road area of Elgin is also assessed. Limited assessment was undertaken in Aberlour, Dufftown, Fochabers and Rothes.

1.3 The report does not seek to provide an interpretation of the information obtained- its role is to provide the base information for other studies/analysis to interpret.

Elgin Town Centre

1.4 Comparison outlets continue to be the dominant town centre use. However the town centre has a broad mix of other shops including convenience, retail services and leisure services. There is a good mix of national multiples and independent stores providing variety in the town centre. Vacancy rates are higher than 2012 at 15%. The core of the High Street (around the Plainstones) continues to have the highest footfall and footfall was generally similar to 2012.

Edgar Road

1.5 Comparison outlets continue to be the dominant use in the Edgar Road area in terms of number of units and floor space, however there is significant floor space given to convenience retailing. Within this area there is a high percentage (79%) of national multiples. The pedestrian flow recorded was higher than 2012. Vacancy rates are lower than 2012 at 16%.

Forres

1.6 As with other towns comparison retailing is the dominant use in the town centre with significant levels of retail services, convenience and leisure services. 21% of retail units are national multiples and the independent shops give character to the town centre. Vacancy rates have decreased since 2012 to 8.16%. Pedestrian footfall was higher than 2012.

Keith

1.7 Comparison retailing is the dominant town centre use with convenience and retail services contributing to the mix. The number of national multiples is 12% of the retail uses. The vacancy rate has decreased since 2012 to 8%. The footfall recorded was lower than 2012 but weather was particularly adverse which may have impacted on pedestrian activity.

Buckie

1.8 Comparison continues to the dominant retail use within the town centre, but there are also good levels of convenience floor space. There is also a good mix of retail services, financial and business services and leisure services. National multiples make up 30% of the retailing. The vacancy levels have increased significantly from 4.82% in 2012 to 13.92%. Generally footfall was lower than 2012.

Lossiemouth

1.9 Leisure uses dominate in Lossiemouth but there is a fairly even mix between comparison, convenience, and retail services. Only 7.6% of retail is national multiples. The vacancy rate has increased from 10.17% in 2012 to 16%. This is an increase of two units compared to 2012. The footfall recorded on Clifton Road was lower than 2012 but footfall on Queen Street was higher.

Smaller Settlements

1.10 The dominant use in Dufftown and Rothes was leisure services reflecting that these towns are popular tourist destinations. In Fochabers and Aberlour both comparison and leisure uses are dominant. Vacancy rates are all below 5% with the exception of Rothes where 3 vacancies were recorded and a vacancy rate of 13%. However it is noted that there has been no increase in the number of vacant units in Rothes since 2012.

Summary Table of Key Findings

1.11 A summary table of key findings is set out below.

Town	Comparison		Convenience		Retail Service		Leisure Service		Vacancy		Vacancy Rate		% of National Multiples	
	2014	2012	2014	2012	2014	2012	2014	2012	2014	2012	2014	2012	2014	2012
Elgin	86	94	18	22	45	46	67	67	39	25	15.3	9.8	34	31
Edgar Road	19	15	2	2	3	3	2	1	5	9	16	30	79	80
Forres	32	32	15	15	20	22	23	23	8	10	8.16	9.8	21	21
Keith	28	29	13	12	9	10	19	18	6	10	8	12.66	12	13.7
Buckie	27	35	7	8	15	17	19	19	11	4	13.92	4.82	30	21
Lossiemouth	12	12	6	7	10	12	16	17	8	6	16	10.1	7.6	8
Aberlour	8	9	4	4	4	5	9	8	0	1	0	3.7	6.25	11

Dufftown	10	8	7	6	5	4	20	20	1	4	2.3	9.5	13.6	16.7
Fochabers	8	9	3	4	3	3	9	8	1	1	4.2	4.0	14.3	14.3
Rothes	5	3	4	4	2	3	9	8	3	3	13	14.3	27	30

2. Vitality & Viability Indicators

2.1 This analysis focuses on an assessment of the performance of the existing 'town centres' of Elgin (and also Edgar Road), Forres, Keith, Buckie and Lossiemouth. In addition, limited audits were carried out for Aberlour, Dufftown, Fochabers and Rothes. This report provides an assessment of existing 'town centre' uses in line with Scottish Planning Policy (SPP) criteria and the recommendations of the '*Town Centres Retailing and Methodologies'* paper published by the Scottish Government in December 2007.

2.2 Vitality' is a measure of how lively and busy a town centre is. 'Viability' is a measure of capacity to attract ongoing investment for maintenance, improvement and adaptation to changing needs. Together these measures give an indication of the health of a town centre and, when used consistently over a period of time as part of a town centre health check, can demonstrate changes in performance that can inform future decision making. A brief description of key Vitality and Viability Indicators assessed in this report are provided below.

2.3 **Pedestrian flow** can be defined as the movement of people past a particular location over a specified period of time (e.g. average hourly counts). Data was collected at different times of day (peak/off peak) and on different days of the week in pre-selected locations. Plans of the footfall survey locations are provided in Appendix II.

2.4 **Diversity of Uses** surveys have been undertaken, which comprise an analysis of the mix of uses within the centres and the quantum of floor space they occupy. Floor space data from the Regional Assessor is used where available and conducted site surveys of each of the study areas, using GOAD Experian Ltd. categories and classifications; - a table showing GOAD categories is included in Appendix III.

2.5 **Retailer representation** is a recording and assessment of those retailers located within the town centre in terms of identity and type (e.g. multiple or independent retailers).

2.6 **Vacancy rates** can be defined as either the number of units or amount of vacant floor space not in occupation, expressed as a percentage of the total number of retail units or floor space in a centre. Vacancies are measured for vacant Comparison, Convenience, Retail Services and Leisure Services only. We have also provided a measurement of the length of retail frontage that is vacant in each centre. This is an indicator of the impact that vacancies have on the appearance and feel of a centre, since this is what most shoppers in the centre will be aware of.

2.7 **Accessibility** to and from a centre is a key factor in the attractiveness of a centre and is an important indicator underpinning town centre viability. Indicators should encompass most of the following: public and private transport modes, congestion issues, and provision for the disabled and cyclists.

2.8 **Environmental quality** is a key factor which contributes directly to the vitality of a centre and, indirectly, to town centre viability.

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

2.10 Information on **retail rents** and commercial **yields** was collected in 2010. However, despite sending out 9 questionnaires to retail agents operating in the area none were returned.

2.11 The 2010 Report looked at **Retailer intentions**; the intentions of existing retailers to relocate/occupy more or less space in a centre. This has not been completed for 2014.

2.12 **Crime, safety and perceptions of** are indicators of vitality in a centre. This was reported in 2010 however the data sourced from Grampian Police relates to Beat Areas which do not correspond to the town centre areas and are much wider areas, sometimes including rural areas as well as urban areas. As this information does not give an indication of the crime and safety of town centres it will only be reported when consumer surveys are undertaken when perceptions of crime and safety can be captured.

2.13 **Consumer surveys** were undertaken in 2010, given the scale and cost of this exercise it is only likely to be undertaken on a five yearly basis or when need arises. Similarly a study in respect of **turnover** was undertaken in 2010 but due to the scale and cost of this it is only likely to be repeated on a five yearly basis or when need arises.

3. Elgin Town Centre Health Check

Pedestrian Footfall

3.1 A pedestrian flow count was undertaken by Moray Council staff on Saturday 27 September 2014 and Thursday 2 October 2014, between 10.00 and 17.00. Pedestrian footfall data was collected at 6 positions throughout the town centre. Full details of the survey locations are provided below. A plan of the footfall survey locations is provided in Appendix II.

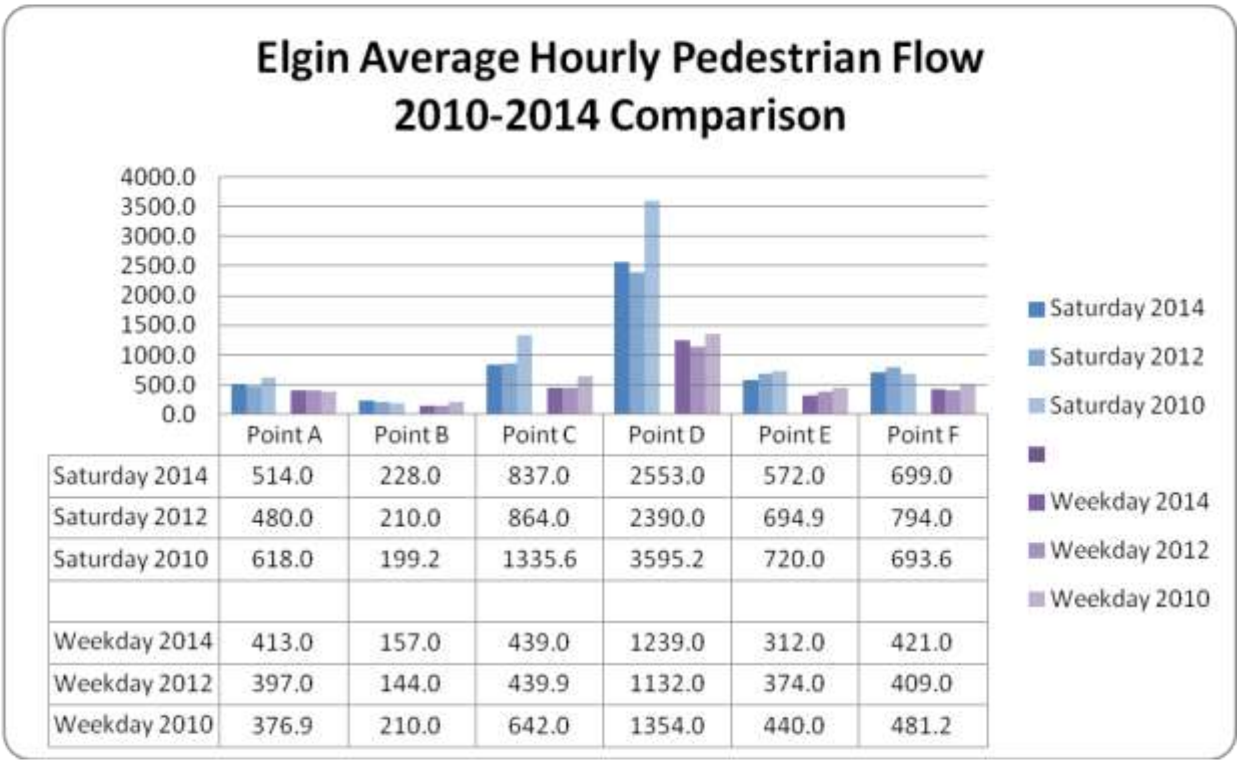
Table 1: Details of Elgin Town Centre Footfall Survey

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

3.2 Of the six locations, the position opposite Boots in the High Street (Point D) recorded the busiest footfall on both the Thursday and Saturday. It should be noted that during previous Surveys the Farmers' Market was taking place on the Plainstones, however this was not possible in 2014 however there was a continental market taking place on the Saturday during the count. The lowest pedestrian flow count in the town centre was recorded at the western end of High Street (Point B) on both Thursday and Saturday.

3.3 Comparison to the footfall survey undertaken in 2012 shows marginal increases at Points A, B, D on both Thursday and Sunday and at Point F on Thursday. At Point C the Saturday count was marginally lower than 2012 and the same for Thursday. At Point E the flow was lower on both Thursday and Saturday compared to 2012. At Point F on Saturday the flow was some 12% lower than 2012 however the 2014 flow is higher than that in 2010. The biggest differences between 2012 and 2014 are at point C where flows are around 17% lower. Increases in flow are generally smaller ranging from 3 to 9%. The weather in 2014 was generally bright and dry but breezy. The weather during the 2012 count was cold and windy with some wet showers. Chart 1 below illustrates the average flows for 2010, 2012, and 2014 at each position on Saturday and Thursday.

Chart 1: Elgin Average Hourly Flow 2010/2012/2014 comparison



	Point A	Point B	Point C	Point D	Point E	Point F
Saturday 2014	514.0	228.0	837.0	2553.0	572.0	699.0
Saturday 2012	480.0	210.0	864.0	2390.0	694.9	794.0
Saturday 2010	618.0	199.2	1335.6	3595.2	720.0	693.6
Weekday 2014	413.0	157.0	439.0	1239.0	312.0	421.0
Weekday 2012	397.0	144.0	439.9	1132.0	374.0	409.0
Weekday 2010	376.9	210.0	642.0	1354.0	440.0	481.2

3.4 Variation in pedestrian flows at different times of the day for the total enumeration period can be analysed. The Thursday count revealed that the peak in flow occurred between 12.00-14.00, with the lowest flow occurring 16.00-17.00, when 13.5% of the flow occurred. Further details of the Time of Day Analysis are illustrated in *Table 2* below.

Table 2: Elgin Footfall- Time of Day Analysis- Thursday 2 October 2014

	Enumeration Point	10.00-11.00	%	11.00-12.00	%	12.00-14.00	%	14.00-15.00	%	15.00-16.00	%	16.00-17.00	%
A	A96 Underpass	**58**	14	**70**	17	**73**	18	**70**	17	**96**	23	**46**	11
B	West end of High Street	**21**	13	**23**	15	**35**	22	**24**	15.5	**24**	15.5	**30**	19
C	Thunderton Place	**70**	16	**89**	20	**88**	20	**69**	16	**48**	11	**75**	17
D	High Street	**180**	14.5	**247**	20	**325**	26	**181**	14.5	**160**	13	**146**	12
E	South Street	**63**	20	**57**	18	**50**	16	**47**	15	**46**	15	**49**	16
F	East end of High Street	**61**	14.5	**128**	30	**66**	16	**55**	13	**58**	14	**53**	12.5
	Total	**453**	15	**614**	20.5	**637**	21.5	**446**	15	**432**	14.5	**399**	13.5

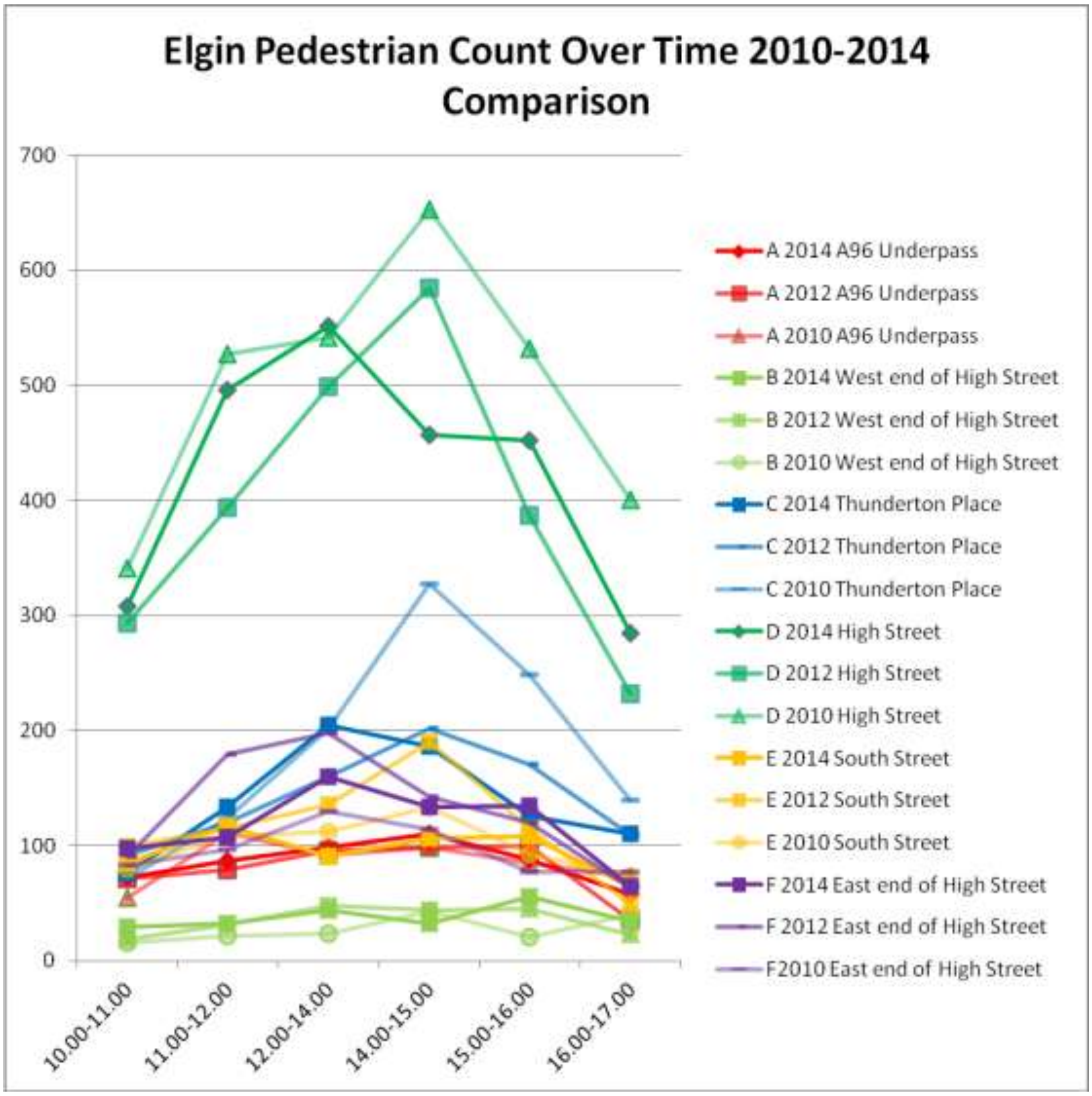
3.5 Analysis of the Saturday count showed that similar to the Thursday count the peak in flow occurred between 12.00-14.00 when 21% of the flow was recorded. Also the lowest flow occurred between 16.00-17.00 when 11.5% of the flow was recorded. Further details of the Time of Day Analysis recorded on Saturday 27th September are illustrated in *Table 3* below.

Table 3: Elgin Footfall- Time of Day Analysis- Saturday 27th September 2014

	Enumeration Point	10.00-11.00	%	11.00-12.00	%	12.00-14.00	%	14.00-15.00	%	15.00-16.00	%	16.00-17.00	%
A	A96 Underpass	**72**	14	**87**	17	**99**	19	**110**	21.5	**88**	17	**58**	11.5
B	West end of High Street	**30**	13	**32**	14	**44**	19	**32**	14	**56**	24.5	**34**	14.5
C	Thunderton Place	**76**	9	**134**	16	**205**	24.5	**186**	22.5	**126**	15	**110**	13
D	High Street	**308**	12	**496**	19	**551**	22	**457**	18	**456**	18	**285**	11
E	South Street	**85**	15	**117**	20.5	**91**	16	**106**	18.5	**108**	19	**65**	11
F	East end of High Street	**98**	14	**107**	15.5	**160**	23	**134**	19	**135**	19.5	**65**	9
	Total	**669**	12.5	**973**	18	**1150**	21	**1025**	19	**969**	18	**617**	11.5

3.6 Generally the variation in pedestrian flow at different times of the day has remained largely similar to that of 2012, with the peaks and drops largely occurring in the same pattern. The line graph in *Chart 2* illustrates this.

Chart 2: Elgin Pedestrian count over time 2010-2014 comparison



Diversity of Uses

3.7 Surveys of the town centre indicate a wide range of different uses and types of property within the town centre. The centre has a wide range of retail and non-retail facilities and activities, including tourist attractions such as Elgin Museum.

3.8 *Table 4* below demonstrates that the dominant use within Elgin town centre is Comparison retailing (e.g. clothing; footwear; electrical goods etc.). There is also a significant proportion of Retail Services within the town centre (e.g. hairdressers; beauticians; travel agents) and Leisure Services (e.g. hotels; pubs; restaurants; cinemas). There are a smaller proportion of Convenience shops (e.g. supermarkets; grocery stores etc.) but these include the Tesco superstore. Therefore, in terms of floor space, Convenience comprises a significant proportion of the town centre floor space. The town centre also includes a range of other local businesses predominantly in the Financial and Business Services sector such as solicitors, accountants and property agents. Also, in the town centre it should be noted that there are a significant number of dwellings including flats, especially on upper floors and in the peripheral parts of the town centre.

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

Table 4: Elgin- Diversity of Uses

Summary of Elgin Diversity of Uses Survey				
	July 2014		July 2012	
Type of Use	**No. of Outlets**	**Floor space (sqm)**	**No. Of Outlets**	**Floor space (sqm)**
Comparison	86	23865	94	27208.8
Convenience	18	15570.2	22	16008.5
Retail Service	45	5088.3	46	7157
Leisure Service	67	16282.6*	67	15630.6*
Financial & Business Service	48	8847.5	49	8923.5
Health & Medical	9		9	
Public Service	19		19	
Religious Service	5		5	
General Office Use	27		25	
Vacancy	39	7520**	25	5203.6***
Total	**363**	**77173.6**	**361**	**80,132**

Notes:

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

**** No floor space data for vacant pubs and 18 South Street**

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

3.10 There have been some changes to the categorisation of certain uses to improve consistency between towns. These adjustments as the study progresses account for some of the differences between categories.

Retailer Representation

3.11 There are a number of national multiple retailers located within Elgin, including Marks & Spencer, WH Smiths and M&Co. Site surveys revealed 51 national (Scottish/UK) multiples in the town centre out of a total of 149 comparison, convenience, and retail service outlets – that is 34%. In addition to the multiple retailers, the town centre has a good provision of independent/specialist retailers. South Street, Batchen Street and Commerce Street accommodate a collection of independent stores in smaller retail units providing a more bespoke range of services.

3.12 Within the defined town centre boundary there are a number of food stores, the largest of which are the 9,887.8 sq m (net) Tesco on Blackfriars Road, the 1,559 sq m Marks & Spencer's store on High Street and the 1,509 sqm Aldi store. Both Tesco and M&S have a substantial portion of floor space for Comparison goods as well as convenience. In *Table 4* above, this has all been classed as 'Convenience' floor space.

3.13 7 (4.7%) units in the town centre were identified to be charity shops. This is lower than the 9 units recorded in 2010.

3.14 One of the biggest changes highlighted in the 2012 study was the increase in pawnbrokers, "buy, sell and loan stores" and gold buying outlets. In 2012 five outlets of this type were recorded during the survey, an increase from only 1 outlet (Ramsdens) in 2010. In July 2014 there was a small reduction in these to four outlets.

Vacancy Rate

3.15 A site survey by Moray Council planning staff during July 2014, confirmed the number of vacant units stood at 39[1], as illustrated above in *Table 4.* Vacancies account for 15.3% of the total number of Comparison, Convenience, Retail and Leisure Service units within the centre. This is a significant increase from 2012 when 25 units were recorded, representing 9.8% of the total number of Comparison, Convenience, Retail and Leisure Service units. This is also above the 10% average used in Scotland to indicate the relative health of a town centre. It is also above the average vacancy rate for Scotland of 13.7% reported by the BBC/Local Data Company.

3.16 New vacancies since 2012 include several national retailers such as JJB Sports, Dorothy Perkins, New Look, First Choice Travel, and Comet. In addition to the nationals a number of independent retailers have also accounted for the increase in vacancies including Geddes and Mellis, The Olive Tree, Elgin Fancy Dress and Eterno Bride. It is also noted that at the time of the survey two pubs accounted for the new vacancies, The Thunderton and The Cooperage. There are a number of units which have remained vacant for several years including 186 and 188 High Street, 51 South Street (Old Junners) and 7 Batchen Street. Since the survey was completed in July there has been activity in some of the vacant stores for example Bright House has opened in the former JJB Sports, the Cooperage has reopened, and a new Orthodontist has moved into 89 High

[1] It should be noted that vacancies are measured for vacant Comparison; Convenience; Retail Service; and Leisure Service outlets only and is based on their last use.

Street. However, vacancy levels remain high and impact on the appearance of the town centre.

3.17 Floor space data obtained from the Regional Assessor indicates that there is approximately 7,520 sq m of vacant floor space with Elgin town centre. There is approximately 171 m of vacant retail frontage in the town centre (figure obtained by scaling off OS-base plans). This figure equates to approximately 13% of the retail frontage of the traditional shopping streets in the town centre- (e.g. the core retail area of High Street; Commerce Street; Batchen Street; South Street and Thunderton Place). This is an increase from 9.2% found in 2012.

Accessibility

3.18 The east/west alignment of the A96 is paralleled by the Aberdeen to Inverness rail line which serves Elgin. The northern inner relief road has created severance between the town centre core and key neighbourhoods and landscape amenity spaces. The eastern and western approaches to the town centre and the gateways at either end fail to offer an appealing or appropriate quality of introduction to the town centre. The disconnection between the town centre and the railway station located on Station Road is also an issue.

3.19 Elgin bus station is located on Alexandra Road, adjacent to the St. Giles Centre. As Moray is a predominantly low density, rural area, bus services are often not commercially viable. Innovative solutions such as community bus services and dial-a-bus services have been developed at a lower cost than standard bus services to meet the transport needs of the population (*Local Transport Strategy*, 2011). The bus services operating in and around Elgin are detailed below.

Table 5: Elgin bus services

Service No.	Route	Days Available
10/10A/X10	Aberdeen - Huntly - Keith - Elgin - Forres - Nairn - Inverness	Monday to Sunday
11/11a	Elgin - Forres - Nairn - Inverness Airport - Inverness	Monday to Sunday
30A/30C	Bishopmill Circular	Monday to Saturday
31/31B	Elgin – Findhorn/Kinloss - Forres	Monday to Saturday
32	Burghead Hopeman - - Elgin - Bishopmill	Monday to Saturday
33A/33C	Pinefield- Manitoba –Thornhill –Maryhill- Elgin bus Station- Lossiemouth	Monday to Sunday
34/34A	Kingston/ Garmouth– Lhanbryde – Elgin- Bishopmill	Monday to Saturday
35/X35	Aberdeen - Turriff - Banff - Buckie - Elgin	Monday to Sunday

36	Dufftown – Aberlour –Craigellachie -Rothes– Elgin	Monday to Saturday
590	Lossiemouth-Bishopmill – St Slyvesters	School Days only
363	Tomintoul - Aberlour - Elgin	Thursday

3.21 There are a number of both Council and private operated car parks within the town centre providing 1455 car park spaces, with car parking charged at £1 for up to 2 hours parking, or £2 for 2 to 4 hours parking and £4 for 4 to 10 hours parking. Parking all day at Lossie Green and Lossie Wynd is charged at £1. There is also extensive on-street parking within the town centre. *Table 6* below, summarises the Council operated car parking provision in the town centre.

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

No. Of Spaces (as at 08/02/2012)								
Car Park	**Car**	**Disabled**	**Parent & Child**	**M/C**	**Bus**	**Lorry**	**Cycle**	**Pay & Display**
Batchen Lane	210	6	7	1				Mon-Sat
Hall Place	28	1						Mon- Sat
Greyfriars Street	63	3						Sat *
HQ Annexe	135	10		4				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
Northfield Terrace	74	2						Mon- Sat
North Port	88	10						Mon- Sat
South Street	18	1						Mon- Sat
St. Giles Road	270	13		1				Mon- Sat

*Car parking available only on Saturdays.

Environmental Quality

3.22 The visual character of Elgin is characterised by the visual landmarks of Ladyhill and the Duke of Gordon monument, Elgin Cathedral, St. Giles Church, Dr. Gray's Hospital, the Anderson Institute and other significant vertical markers. The historic development of Elgin can clearly be detected in the urban form, most notably the linear market place of High Street and the narrow closes which open onto it. The centre has 109 listed buildings and is a designated Conservation Area. The historic environment creates a largely attractive environment, although the appearance of some buildings is tired and unkempt.

3.23 Elgin Conservation Regeneration Scheme (CARS) was launched in August 2013 and investment in town centre buildings has been made. The Elgin Conservation Area Regeneration Scheme will run for five years and therefore more investment is anticipated. Repairs will be undertaken to key traditional buildings with a grant scheme for other property owners to repair traditional shop fronts, sash and case windows, cast iron rain water goods and other external repairs.

Tourism

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

Elgin Summary

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

3.26 The vacancy rate accounts for 15.3% of the total number of Comparison, Convenience, Retail and Leisure Service units within the centre. There is an increased rate of vacancy since 2012 and vacancies are higher than the Scottish Average of around 10%. The increased vacancy levels have impacted on the appearance of the town centre. Pedestrian footfall has remained relatively similar to 2012 levels with the exception of South Street and the east end of the High Street were lower.

3.27 There are parts of the town centre, including the Lossie Green area that could be enhanced and some of the entrances into the city centre are poor in terms of their legibility and attractiveness.

3.28 There are various initiatives and projects working in partnership in Elgin to enhance the town centres vitality and viability. In July 2014 Elgin was one of only three towns chosen as part of Business Community's Healthy High Street campaign. This initiative is supported by businesses such as Marks and Spencer, Boots, and Santander. The campaign provides support over a three year period with access to business expertise and resources to help High Streets. The impact of the campaign will be assessed against footfall, vacancy, and job creation indicators. Elgin BID has also been successful in their renewal ballot and have been given a mandate by businesses for another five year term from February 2015. The business plan sets out actions and a vision for a thriving and busy city centre with a supportive and involved business community. The Moray Council are also one of nine authorities signed up to developing a project to test approaches to help simplify planning processes in town centres.

4. Edgar Road Health Check

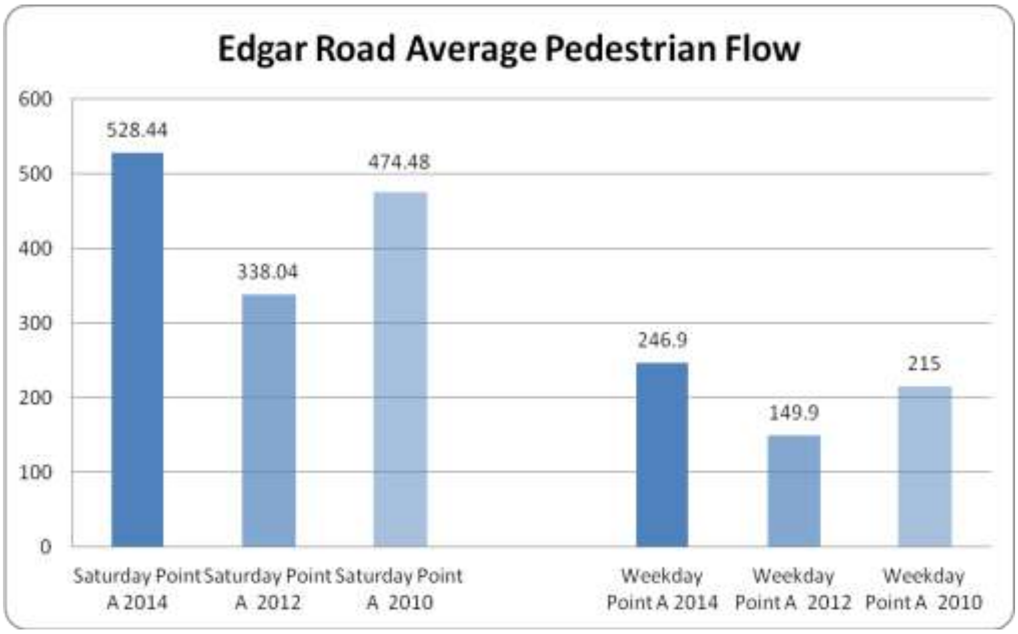
4.1 Although not part of Elgin town centre, the Edgar Road area (including the Edgar Road and Springfield Retail Parks) is a major commercial centre and a key focus for substantial retail activity. The following Vitality and Viability Indicators have been examined for this area: Pedestrian Footfall;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

Pedestrian Footfall

4.2 A pedestrian flow count was undertaken by Moray Council staff on Friday 12 and Saturday 13 September 2014 at the Springfield Retail Park. Pedestrians, who crossed a point between NEXT and Costa Coffee, were counted between 11.00 to 15.30. Caution should be applied when interpreting these results, given the layout of the retail park, a significant number of pedestrians who were shopping in the area didn't cross the count point; therefore, the results outlined below may be misleading.

4.3 An overview of the average hourly flows is summarised in the *Chart* 3 *below* with comparison to the 2012 results. This shows that the average hourly flows have increased, approximately 56% on Saturday and 64% on Friday.

Chart 3: Edgar Road – Average Hourly Flow



Diversity of Uses

4.4 Information on the retail mix of the Edgar Road area of Elgin is set out below. The dominant use is Comparison retailing. Only a small number of units are for

Convenience goods but these include the Asda and Allarburn Diary therefore these make up a significant proportion of the area's floor space.

Table 7: Edgar Road Diversity of Uses

Summary of Edgar Road Diversity of Uses Survey				
	July 2012		July 2010	
Type of Use	**No. of Outlets**	**Floor space (sqm)**	**No. Of Outlets**	**Floor space (sqm)**
Comparison	19	20718.5	15	18046.5
Convenience	2	12386.8	2	12386.8
Retail Service	3	626	3	626
Leisure Service	2	456.5	1	269.5
Financial & Business Service	4		4	
Health & Medical	1		1	
Public Service	1		1	
Religious Service	0		1	
General Office Use	0		0	
Vacancy	5	3516.21	9	6375.16
Total	**37**	39457.51	**37**	37703.96

Retailer Representation

4.5 There are 19 national (Scottish/UK) multiples in the Edgar Road Area out of a total of 24 retail goods shops– that is 79%. This figure can be contrasted to Elgin town centre, where 34% of the retail goods shops are currently multiples.

Vacancy Rates

4.6 *Table 7* above indicates that the number of vacant units identified by Moray Council planning staff was 5, which is a vacancy rate of 16%. This is a reduction from 30% in 2012. Floor space data obtained from previous planning application documents indicates that there is approximately 3516.21 sqm of vacant floor space in the Edgar Road area where 5 units are vacant.

Accessibility

4.7 Edgar Road is served by both public and private transport. Route numbers 33A and 33C (Pinefield-Manitoba-Thornhill-Maryhill- Elgin Bus Station– Lossiemouth) service the route at twenty minute intervals Monday to Saturday and hourly on Sundays.

Elgin train station is located on Station Road just outside the boundary of the Edgar Road survey area and provides local, regional and national connections. Access across the railway line is via a pedestrian bridge. Both Asda and B&Q provide cycle rack facilities.

Edgar Road Summary

4.8 The Edgar Road area of Elgin provides a significant concentration of trading retail floor space. It is notable that the area has 19 comparison goods retail units (20718.5 sqm). Only a small proportion of units are for convenience goods but this includes Asda and therefore a significant proportion of the area's floor space is given over to Convenience. The number of vacant units was 5, which is a vacancy rate of 16%. Whilst still high this is a significant reduction compared to the 9 units recorded in 2012.

4.9 In overall terms, the Edgar Road area of Elgin has exhibited improved signs of vitality and viability.

5. Forres Town Centre Health Check

Pedestrian Footfall

5.1 A pedestrian flow count was undertaken by Moray Council staff on Friday 26 September (between 14.00 and 17.00) and Saturday 27 September 2014 (between 10.00 and 13.00). Pedestrian footfall data was collected at two positions throughout the town centre. The survey locations are provided below with a plan of the footfall survey location is provided in Appendix II.

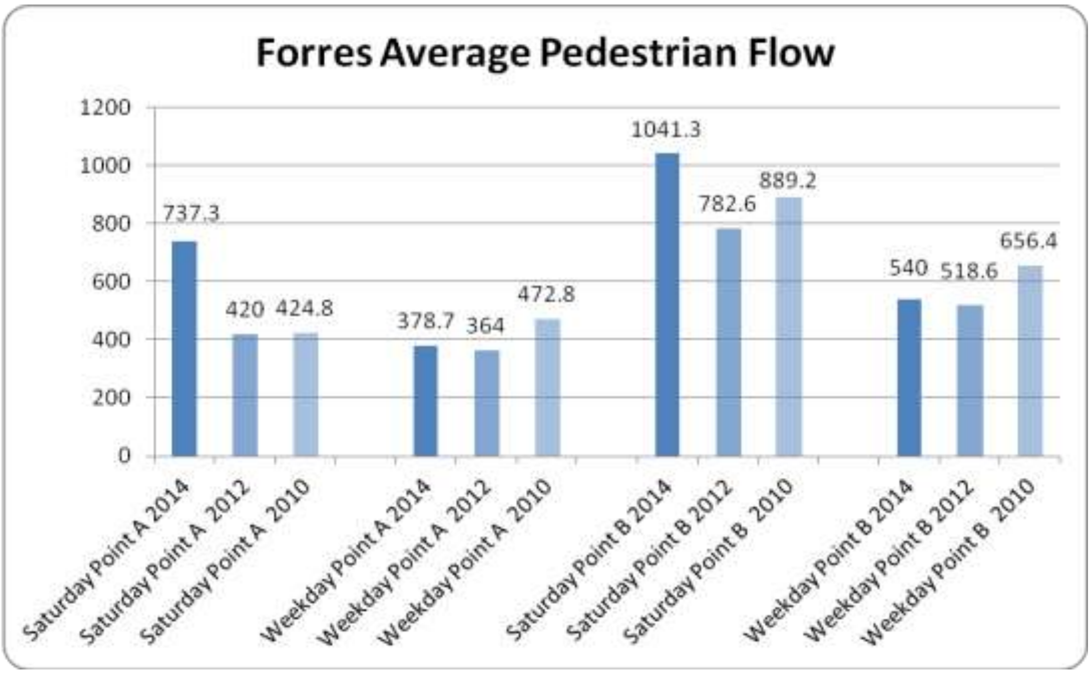
Table 8: Details of Forres Footfall Survey

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

5.2 Of the two locations point B recorded the busiest footfall on both Friday and Saturday. The lowest pedestrian flow count in the town centre was recorded at the north-eastern end of High Street, at point A on Friday.

5.3 An overview of the average hourly flows recorded with a comparison to 2010 and 2012 survey is shown below. The average flow in 2014 was higher than 2010. The biggest increases were on Saturday however, it is noted the count took place on Forres Culture Day when various family focused activities were taking place.

Chart 4: Forres Average Hourly Pedestrian Flow



5.4 Analysis of the Friday count revealed that overall, 41% of the total flow peaked between 15.00 and 16.00. Further details of the weekday Time of Day Analysis is illustrated in *Table 9* below.

Table 9: Forres- Time of Day Analysis- Friday 26 September 2014

	Enumeration Point	14.00-15.00	%	15.00-16.00	%	16.00-17.00	%
A	No. 42 High Street- (Superdrug)	97	34%	119	42%	68	24%
B	No. 90 High Street- (Boots Chemist)	127	31.5%	164	40.5%	114	28%
	Total	224	**32.5%**	283	**41%**	182	**26.5%**

5.5 The Saturday count revealed that overall the lowest flow (22%) occurred between 10.00 and 11.00 increasing thereafter. Further details of the Time of Day Analysis recorded on Saturday 27 September is illustrated in *Table 10*.

Table 10: Forres- Time of Day Analysis- Saturday 27 September 2014

	Enumeration Point	10.00-11.00	%	11.00-12.00	%	12.00-13.00	%
A	No. 42 High Street- (Superdrug)	106	19%	176	32%	271	49%
B	No. 90 High Street- (Boots Chemist)	188	24.%	235	30.%	358	46%
	Total	294	**22%**	411	**31%**	629	**47%**

Diversity of Uses

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

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

Table 11: Diversity of Uses Forres

Summary of Forres Diversity of Uses Survey				
	July 2014		July 2012	
Type of Use	**No. of Outlets**	**Floor space (sqm)**	**No. Of Outlets**	**Floor space (sqm)**
Comparison	32	4924*	32	3917.2*
Convenience	15	2360.2**	15	2389.6**
Retail Service	20	2415.8	22	2449.1
Leisure Service	23	1292.3***	23	1386.6***
Financial & Business Service	21	4271.1****	21	4316****
Health & Medical	5		3	
Public Service	12		11	
Religious Service	3		4	
General Office Use	5		6	
Vacancy	8	2548.3	10	3567.9
Total	**144**	17811.7	**147**	18026.4

Notes:

***No floor space data for Orchard Road**

****No floor space data for 97j High Street**

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

******No floor space data for Lea Road**

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

Retailer Representation

5.10 There are 14 national (Scottish/UK) multiples in the town centre out of a total of 67 retail goods/services shops– that is 21%. Five (7.5%) units within the town centre were identified to be charity shops. Much of Forres's character comes from its independent retail provision.

Vacancy Rates

5.11 *Table 11* above indicates that the number of vacant units identified by Moray Council planning staff was 8, which is a vacancy rate of 8.16%- which is below the average 10% which is generally used in Scotland to indicate the relative health of a town centre. Vacancies in Forres have decreased from 10 vacant units (9.8%) recorded in 2012.

5.12 Floor space data obtained from the Regional Assessor indicates that there is approximately 2548.3 sqm of vacant floor space in Forres town centre. There is approximately 19 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 equates to approximately 2.5% of the retail frontage of the traditional shopping streets in the town centre- (e.g. the core retail area of High Street and Tolbooth Street). This is a decrease from the 5.74% found in 2012.

Accessibility

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

Table 12: No. of Car Parking Space in Forres

No. of Spaces (as at 08/02/2012)								
Car Park	**Car**	**Disabled**	**Parent & Child**	**M/C**	**Bus**	**Lorry**	**Cycle**	**Pay & Display**
Cumming Street	11	1						Free
High Street	42	5		1				Free
Leask Road	62	4						Free
Leys Road	57	4						Free
Orchard Road	112	7		1				Free
Tulloch Park	74	2						Free

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

Environmental Quality

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

Tourism

5.16 Forres is a popular destination for tourists with a number of buildings offering tourist attractions including the Falconer Museum. The attractive urban environment is also a strength of the town for visitors and tourists.

5.17 The findings of the Diversity of Uses surveys found there are three hotels and guesthouses, seven restaurants and cafes and six bars and pubs located within Forres town centre.

Forres Summary

5.18 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. The number of vacant units identified was 8, which is a vacancy rate of 8.16%- which is a reduction in vacancies since 2012 and below the average rate for Scotland.

5.19 In overall terms, Forres exhibits comparatively strong vitality and viability compared to other towns in Moray.

6. Keith Town Centre Health Check

Pedestrian Footfall

6.1 A pedestrian flow count was undertaken by Moray Council staff on Friday 5th (between 10.00 and 13.00) and Saturday 6th (between 14.00 and 17.00) September 2014. Pedestrian footfall data was collected at two positions. Details of the survey locations are provided below with a plan provided in Appendix II.

Table 13: Details of Keith Footfall Survey

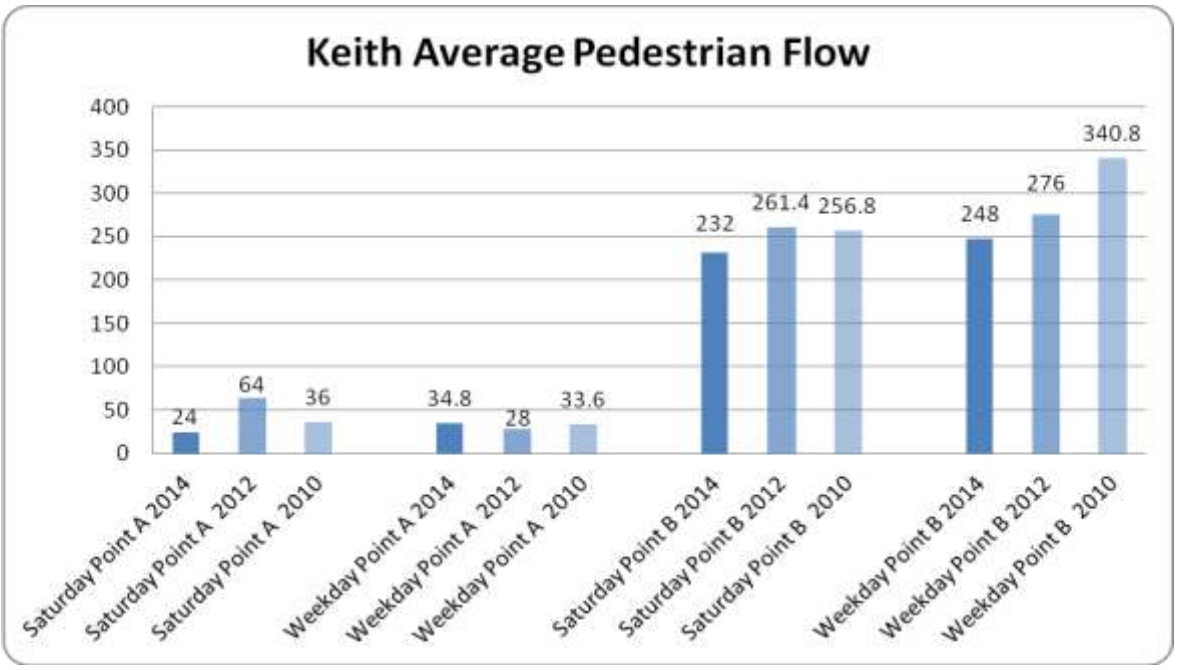
Enumeration Point	Location
A	No. 140 Moss Street- (Pedestrian Crossing on A96 to access TESCO)
B	No.130-132 Mid Street- (Post Office)

6.2 Of the two locations, point B recorded the busiest footfall on both Friday and Saturday. The Friday figure is down some 10% compared to 2012 and the Saturday figure is also down approximately 11 %. It is noted that the weather was particularly wet and windy at times which may have affected pedestrian activity.

6.3 The lowest pedestrian flow count was recorded at the pedestrian crossing on the A96 to access TESCO on both Friday and Saturday. Although extremely low pedestrian activity was recorded at Point A, the average flow on Friday was higher than 2012

6.4 Overviews of the average hourly flows with the comparable figures for 2010 and 2012 are recorded below in *Chart 5*.

Chart 5: Keith Average Hourly Pedestrian Flow



6.5 Analysis of the Friday count revealed that overall, pedestrian flow was highest between 15.00 and 16.00 when 52% of the overall footfall occurred. It was noted that at this time there were many from the primary and secondary school. Further details of the weekday Time of Day Analysis is illustrated in *Table 14*.

Table14: Keith- Time of Day Analysis- Friday 5 September 2014

	Enumeration Point	14.00-15.00	%	15.00-16.00	%	16.00-17.00	%
A	No. 140 Moss Street (Pedestrian Crossing on A96 to access TESCO)	**7**	27%	**15**	**58%**	**4**	15%
B	No. 130-132 Mid Street- (Post Office)	**45**	24%	**95**	**51%**	**46**	25%
	Total	**52**	24.5%	**110**	**52%**	**50**	23.5%

6.6 Analysis of the Saturday count revealed pedestrian flow was relatively consistent throughout the morning. Further details of the Time of Day Analysis recorded on Saturday 6 September is illustrated in *Table 15* below.

Table 15: Keith- Time of Day Analysis- Saturday 6 September 2014

	Enumeration Point	10.00-11.00	%	11.00-12.00	%	12.00-13.00	%
A	Pedestrian Crossing on A96 to access TESCO	8	44.5%	6	33.5%	4	22%
B	Mid Street- (Post Office)	45	26%	59	34%	70	40%
	Total	53	**28%**	65	**34%**	74	**38%**

Diversity of Uses

6.8 Information on the retail mix of the town centre is set out below. The dominant use within the town centre is Comparison shops with Convenience and Retail Services also contributing significantly to the mix of uses.

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

Table 16: Keith Diversity Uses

Summary of Keith Diversity of Uses Survey				
	July 2012		July 2012	
Type of Use	No. of Outlets	Floor space (sqm)	No. Of Outlets	Floor space (sqm)
Comparison	28	5811.3*	29	5308.9*
Convenience	13	1410.4*	12	1777.3
Retail Service	9	767.8	10	956.1**
Leisure Service	19	1078.6	18	1011.5***
Financial & Business Service	14	1617.5	13	1545.9
Health & Medical	1		0	
Public Service	2		2	
Religious Service	1		1	
General Office Use	5		5	
Vacancy	6	659.6	10****	958.8
Total	**98**	11345.2	**100**	11558.5

Notes:

***No floor space data for 31 and 55 Regent Street**

**** No data for garage**

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

****** No floor space data for vacant pub.**

Retailer Representation

6.10 There are six national (Scottish/UK) multiples in the town centre out of a total of 50 retail goods/services shops– that is 12%. Keith has a strong independent sector with the majority of shops being local stores with a distinct identity. In terms of Convenience, a Spar store (399.6 sq m) is located within the town centre on Mid Street. The Tesco store is located off Moss Street, adjacent but outwith the defined town centre boundary. Two units (4%) within the town centre were identified to be charity shops.

Vacancy Rate

6.11 *Table 16* above indicates that the number of vacant units identified was six, which is a vacancy rate of 8%- this is lower than the 10% average used in Scotland to indicate the relative health of a town centre and a decrease of four units from 2012 when 10 (12.66%) units were vacant

6.12 Floor space data obtained from the Regional Assessor indicates that there is approximately 659.6 sqm of vacant floor space in Keith. There is approximately 82m of vacant retail frontage in the town centre (figure obtained by scaling off OS-base plans). This figure equates to approximately 8.4% of the retail frontage on the traditional shopping street in Keith, which is Mid Street. This is a decrease from the 9.7% reported in 2012.

Accessibility

6.13 Keith has good road connections via the A96 running through the town. The centre is served by frequent regional bus services which connect the town to Aberdeen and Elgin. Services to smaller settlements are more limited and operate around school hours. Keith train station is located quite a distance from the town centre.

Table 17: Keith Bus Services

Service No.	Route	Days Available
10/10A/X10	Aberdeen - Huntly - Keith - Elgin - Forres - Nairn - Inverness	Monday to Sunday
351	Cullen- Keith	School days only
353	Dufftown-Mulben- Keith	School days only
354	Milton of Rothiemay-Keith	School days only
360	Aberlour-Dufftown- Keith	School days only
362	Tomintoul-Dufftown- Keith	Tueday

6.14 There are several car parks in Keith, with 198 spaces provided in Council run car parks as well as on street parking in the town centre. The car parks offer free parking. *Table 18* below summarises the number of car parking spaces provided in Keith town centre.

Table 18: No. of Car Parking Spaces in Keith

No. of Spaces (from Council website November 2014)								
Car Park	Car	Disabled	Parent & Child	M/C	Bus	Lorry	Cycle	Pay & Display
Bankers Lane	15	1						Free
Coopers Lane	12	1						Free
Innes Lane	36	1						Free
Mid Street	40	2						Free
Regent Square	36	1						Free
Reidhaven Square	59	6		1				Free

Environmental Quality

6.15 Keith Town Centre benefits from being a Conservation Area. Much of the town centre is of reasonable environmental quality and contains a number of listed buildings. The quality of environment has improved since 2012 as the Keith Conservation Regeneration Scheme (CARS) has resulted in significant investment in buildings. The Keith Conservation Area Regeneration Scheme will run until March 2016 and therefore more investment is anticipated. Repairs will be undertaken to key traditional buildings with a grant scheme for other property owners to repair traditional shop fronts, sash and case windows, cast iron rain water goods and other external repairs.

Tourism

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

Keith Summary

6.17 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 28 comparison goods retail units; 13 convenience outlets; and 9 retail service units.

6.18 Improvements can be seen when comparing the survey results over time. The number of vacant units identified by Moray Council has reduced from 10 in 2012 to 6 in 2014, which is a vacancy rate of 8%- which is below the Scottish average of 10%. There has been investment in buildings within the town centre which has contributed to an improvement in the appearance and amenity of the town centre.

6.19 In overall terms, there has been an improvement on some of the key indicators since 2012 with the exception of footfall where a drop was recorded.

7. Buckie Town Centre Health Check

Pedestrian Footfall

7.1 A pedestrian flow count was undertaken by Moray Council staff on Friday 12 September (between 14.00 and 17.00) and Saturday 13 September 2014 (between 10.00 and 13.00). Details of the survey locations are provided below with a plan provided in Appendix II.

Table 19: Details of the Buckie Footfall Survey

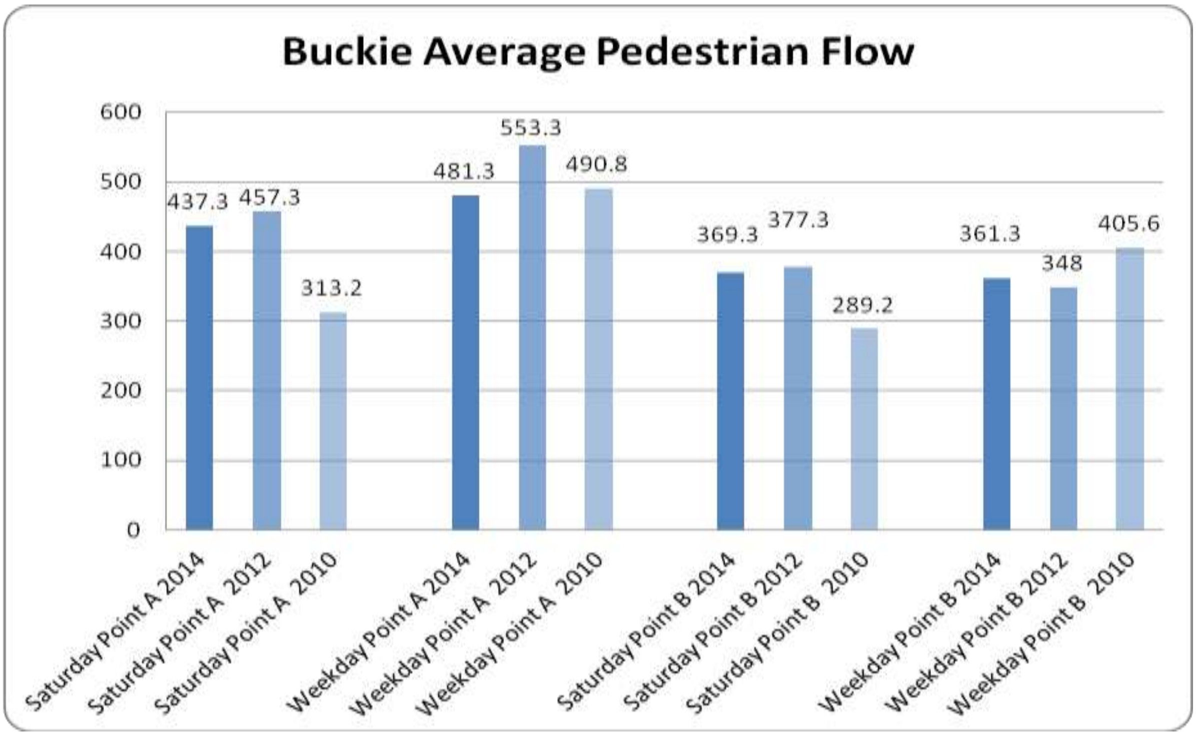
Enumeration Point	Location
A	No. 3 High Street
B	No.3-5 East Church Street-

7.2 Of the two locations, the position at point A recorded the busiest footfall on Friday and Saturday. The weekday count at point A was higher than the Saturday, which reflects the survey findings in 2012. The survey found flows were lower than 2012 with the Saturday count being approximately 4% lower and the Friday count approximately 13% lower.

7.3 At point B the average hourly flow on Friday was 4% higher than that in 2012, however the average flow on the Saturday was 2% lower than 2012.

7.4 An overview of the average hourly flows together with the 2010 and 2012 results are summarised in *Chart 6*.

Chart 6: Buckie Average Hourly Pedestrian Flow



7.5 Analysis of the Friday count revealed that overall, pedestrian flow dipped between 11.00 and 12.00 to 29% but was relatively consistent throughout the morning. Further details of the weekday Time of Day Analysis is illustrated in *Table 20* below.

Table 20: Buckie- Time of Day Analysis- Friday 12 September 2014

	Enumeration Point	10.00-11.00	%	11.00-12.00	%	12.00-13.00	%
A	No. 3 High Street- (Asher's Bakery)	137	38%	110	30.5%	114	31.5%
B	No.3-5 East Church Street-	90	33%	75	28%	106	39%
	Total	227	**36%**	185	**29%**	220	**35%**

7.6 Analysis of the Saturday count revealed that 40% and 40.5% of the overall footfall occurred between the periods 14.00 to 15.00 and 15.00 to 16.00 respectively. Footfall then decreased to 19.5% during the period 16.00 to 17.00. Further details of the Time of Day Analysis recorded on Saturday 13 September is illustrated in *Table 21* below.

Table 21: Buckie- Time of Day Analysis- Saturday 13 September 2014

	Enumeration Point	14.00-15.00	%	15.00-16.00	%	16.00-17.00	%
A	No. 3 High Street-(Asher's Bakery)	138	42%	133	40.5%	57	17.5%
B	No.3-5 East Church Street-(Nationwide)	105	38%	111	40%	61	22%
	Total	243	**40%**	244	**40.5%**	118	**19.5%**

Diversity of Uses

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

Table 22: Buckie Diversity of Uses

Summary of Buckie Diversity of Uses Survey				
	July 2014		**July 2012**	
Type of Use	**No. of Outlets**	**Floor space (sqm)**	**No. Of Outlets**	**Floor space (sqm)**
Comparison	27	5610.2*	35	6611.4*
Convenience	7	21872**	8	2289.2**
Retail Service	15	1486.6	17	1682
Leisure Service	19	2054.2***	19	2000.2***
Financial & Business Service	15	2613	17	2556.1
Health & Medical	3		1	
Public Service	5		4	
Religious Service	4		4	
General Office Use	1		6	
Vacancy	11		4	333.4
Total	**111**		**116**	15472.3

Notes:

***No floor space data for The Original Factory Shop**

**** No floor space data for 32-34 East Church Street (Co-op)**

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

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

Retailer Representation

7.10 There are 15 national (Scottish/UK) multiples in the town centre out of a total of 49 retail goods/services shops– that is 30%. Two units (4%) were identified to be charity shops.

Vacancy Rate

7.11 *Table 22* above indicates that the number of vacant units identified by Moray Council planning staff was 11, which is a vacancy rate of 13.92%. This is above the 10% average used in Scotland to indicate the relative health of a town centre and higher than 2012 when only four vacancies representing a vacancy rate of just 4.82% was recorded . The rate is however close to the Scottish average 13.71% reported in December 2014 by the BBC/Local Data Company.

7.12 Floor space data obtained from the Regional Assessor indicates that there is approximately 940.8sqm of vacant floor space in Buckie town centre. This is approximately 2.94% of the Comparison, Convenience, Retail Service and Leisure Service floor space. This indicates that the vacant units are relatively small. There is approximately 71m of vacant retail frontage in the town centre (figure obtained by scaling off OS-base plans). This figure equate to approximately7.4% 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 increase from the 2.6% reported in 2012.

Accessibility

7.13 There is a town service (number 38a/c) operating within Buckie. The service running between Elgin and Aberdeen (35/X35) runs half hourly and stops in Buckie and also connects to neighbouring centres such as Cullen, Portknockie, Findochty and Portgordon. There are several car parks in Buckie with 317 car park spaces provided in Council run car parks (which are free) as well as some on street parking in the town centre. *Table 23* below summarises the number of public car parking spaces provided in Buckie.

Table 23: No. of Car Parking Spaces in Buckie

No. of Spaces (from Council website November 2014)								
Car Park	**Car**	**Disabled**	**Parent & Child**	**M/C**	**Bus**	**Lorry**	**Cycle**	**Pay & Display**
Cluny Place	67	6						Free
Cluny Square	62	5		1				Free
Great Eastern Road	20	1						Free
Buckie Drifter	38	2						Free
Marine Place	20	2						Free
Newlands Lane	76	5						Free
North Pringle Street	34	1						Free

Environmental Quality

7.14 The centre has a number of listed buildings in the vicinity of Cluny Square, including the All Saints Episcopal Church Hall on West Church Street.

Tourism

7.15 The findings of the Diversity of Uses survey found there is one hotel and seven cafes and restaurants as well as a range of takeaways in Buckie town centre. The Fishing Heritage Centre is located just outside the defined town centre boundary.

Buckie Summary

7.16 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.

7.17 The number of vacant units identified by Moray Council planning staff was 11, which is a vacancy rate of 13.92%. This is higher than the Scottish average of around 10% and is a significant increase when compared to the 4.82% recorded in 2012. A fall in footfall was also recorded when compared to 2012.

7.18 In overall terms, Buckie shows comparatively weak signs of vitality and viability compared to 2012 and other Moray towns but appears to reflect national trends.

8. Lossiemouth Town Centre Health Check

Pedestrian Footfall

8.1 A pedestrian flow count was undertaken by Moray Council staff on Friday 19 (between 10.00 and 13.00) and Saturday 20 September 2014 (between 14.00 and 17.15). Pedestrian footfall data was collected at two positions. Details of the survey locations are provided below with a plan at appendix II.

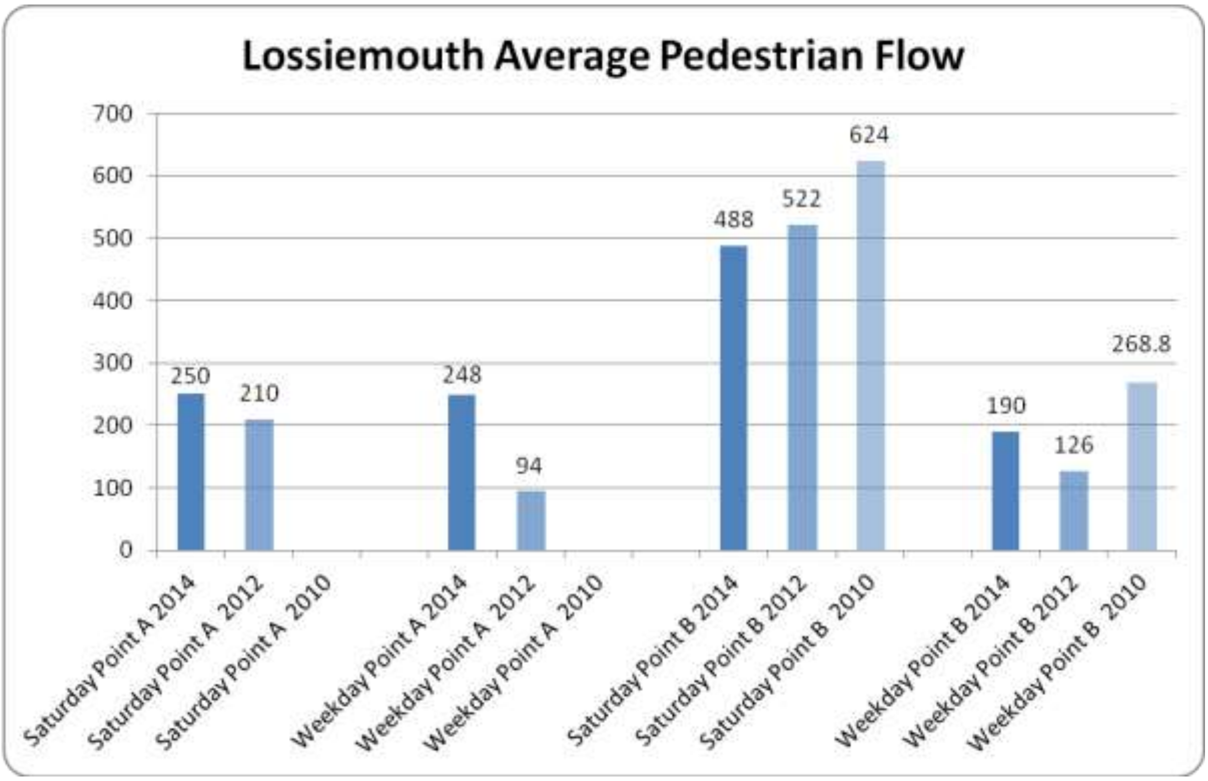
Table 24: Details of Lossiemouth Footfall Survey

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

8.2 Of the two locations, point B recorded the busiest footfall on Saturday. It is notable that the weather conditions were reasonably favourable on both count days, with both days being dry and warm although the Saturday was breezy. Generally footfall was higher with the exception of Saturday at point B when footfall dropped 6.5% compared to 2012. A significant increase was noted at point A on Friday when footfall was over two and half times that of 2012.

8.3 An overview of the average hourly flows for 2014 together with the 2010 and 2012 results at point are recorded in *Chart 7* below.

Chart 7: Lossiemouth Average Hourly Pedestrian Flow



** Survey count undertaken at different location in 2010 for Point A

8.4 Analysis of the Friday count revealed that overall, pedestrian flow was lowest during the 12.00 to 13.00 period. Further details of the weekday Time of Day Analysis is illustrated in *Table 25* below.

Table 25: Lossiemouth Footfall- Time of Day Analysis Friday 19 September 2014

	Enumeration Point	10.00-11.00	%	11.00-12.00	%	12.00-13.00	%
A	No. 78 Queen Street (Co-op)	39	31.5%	50	40.5%	35	28%
B	No. 15 Clifton Road- (Rizza's Ices)	39	41%	30	31.5%	26	27.5%
	Total	78	**35.5%**	80	**36.5%**	61	**28%**

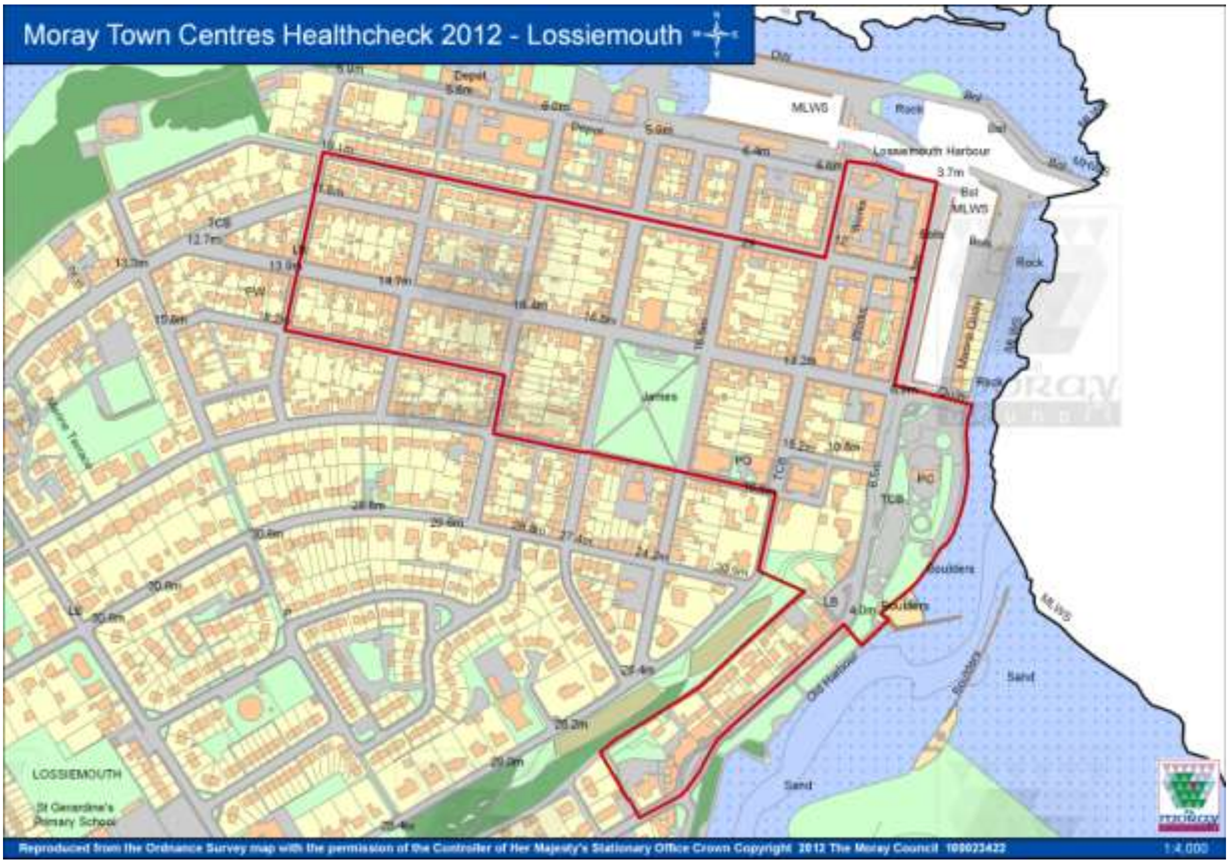
8.5 Analysis of the Saturday count revealed a relatively even pattern throughout the afternoon. Further details of the Time of Day Analysis recorded on Saturday 20 September is illustrated in *Table 26* below.

Table 26: Lossiemouth Footfall- Time of Day Analysis- Saturday 20 September 2014

	Enumeration Point	14.00-15.00	%	15.00-16.00	%	16.00-17.00	%
A	No. 78 Queen Street (Co-op)	45	36%	36	29%	44	35%
B	No. 15 Clifton Road- (Rizza's Ices)	77	31.5%	94	38.5%	73	30%
	Total	122	**33%**	130	**35%**	117	**32%**

Diversity of Uses

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



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

Table 27: Lossiemouth Diversity of Uses

Summary of Lossiemouth Diversity of Uses Survey				
	July 2014		July 2012	
Type of Use	No. of Outlets	Floor space (sqm)	No. Of Outlets	Floor space (sqm)
Comparison	12	2561.5	12	2561.5
Convenience	6	542.1	7	594.3
Retail Service	10	661.2****	12	722.3
Leisure Service	16	1578.6*	17	1578.6*
Financial & Business Service	5	1168.8	5	755.4**
Health & Medical	1		1	
Public Service	3		3	
Religious Service	1		1	
General Office Use	1		1	
Vacancy	8	697.9*	6	774.2***
Total	**63**	7095.5	**65**	6986.3

Notes:

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

**** No floor space data for 5 High Street**

**** *No floor space data for 25 Pitgaveny Street (vacant pub).**

******No data for hair and beauty within 4 Pitgaveny Street**

Retailer Representation

8.9 There are two national (Scottish/UK) multiples in the town out of a total of 36 retail goods/service shops – that is 7.6%.

Vacancy Rate

8.10 *Table 27* above indicates that the number of vacant units identified by Moray Council planning staff was 8, which is a vacancy rate of 16%. This is an increase of two units since the 2012 health check. This is above the Scottish average of 13.72% reported by the BBC/Local Data Company in December 2014 and above the 10% average used in Scotland to indicate the relative health of a town centre.

8.11 Floor space data obtained from the Regional Assessor indicates that there is approximately 697.9 sqm of vacant floor space in the Lossiemouth study area. There is approximately 94 m of vacant retail frontage in the town centre (figure obtained by scaling off OS-base plans). An increase from 73m recorded in 2012.

Accessibility

8.12 Although there is no railway station within the town, there are reasonable bus connections. There is a regular service connecting the town to Elgin (33A/C). This journey takes around twenty minutes and is operated by Stagecoach Monday to Saturday, with a reduced service on Sunday.

8.13 Although much of the parking provision is located on the main commercial streets, there is a small car park on Pitgavney Street (circa 8 spaces), where parking is free of charge.

Tourism

8.14 The findings of the Diversity of Uses survey found there is one hotel and three restaurants and cafes located within Lossiemouth town centre. There are also two caravan sites 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 an 18 hole golf course.

Lossiemouth Summary

8.15 There are few multiple retailers and independent retailers predominate in Lossiemouth. In addition to retailing the centre is also a popular destination for tourists with number buildings offering tourist attractions including the Fishery Museum and The Warehouse Theatre on Pitgavney Quay. Convenience shopping needs are provided for by a number of smaller store units within the wider town centre. Otherwise the depth of goods on offer in the centre is somewhat limited. There are two national (Scottish/UK) multiples in the town out of a total of 36 retail goods/services – that is 7.6%. This figure is lower than the other towns in Moray.

8.16 The number of vacant units identified was eight, which is a vacancy rate of 16%- which is higher than the average trend for Scotland.

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

9. Smaller Settlements Health Check

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

Diversity of Uses

9.2 The overall mix of uses and the quantum of floor space is summarised in the table below along with the 2012 results. It is notable that Dufftown has 20 Leisure Service outlets (e.g. restaurants, cafes, hotels and guesthouses etc). This illustrates the importance of tourism to the centre.

9.3 Other than specialist stores the main-stream comparison retail range in these smaller settlements is very limited with few fashion retailers. Convenience shopping needs are provided for by a number of smaller store units, such as the Co-operative stores in Aberlour, Dufftown and Fochabers. Rothes is serviced by a McColl's and Costcutter.

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

Table 28: Aberlour Diversity of Uses

Summary of Aberlour Diversity of Uses Survey				
	2014		2012	
Type of Use	**No. of Outlets**	**Floor space (sqm)**	**No. Of Outlets**	**Floor space (sqm)**
Comparison	8	543.1	9	702
Convenience	4	647.4	4	647.4
Retail Service	4	1788.3	5	1910.2
Leisure Service	9	572.9*	8	572.9*
Financial & Business Service	2	233.4	2	404.2
Health & Medical	2		1	
Public Service	3		3	
Religious Service	1		1	
General Office Use	1		1	
Vacancy	0	0	1	No Data
Total	**34**	3785.1	**36**	4236.7
Notes:* No floor space data for 7 Broomfield Square. Also the Regional Assessor does not hold floor space data for Hotels and Public House premises.				

Table 29: Dufftown Diversity of Uses

Summary of Dufftown Diversity of Uses Survey				
	2014		2012	
Type of Use	No. of Outlets	Floor space (sqm)	No. Of Outlets	Floor space (sqm)
Comparison	10	356.8	8	330.5
Convenience	7	912.2	6	869.6
Retail Service	5	136.3*	4	110.50*
Leisure Service	20	1687.7**	20	1730.3**
Financial & Business Service	3	1416.9	3	1416.9
Health & Medical	0		0	
Public Service	3		3	
Religious Service	0		0	
General Office Use	0		0	
Vacancy	1	111.3***	4	111.3***
Total	**49**	4569.1	**48**	4569.1

Notes:

*** No floor space data for 29 Fife Street.**

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

Table 30: Fochabers Diversity of Uses

Summary of Fochabers Diversity of Uses Survey				
	2014		2012	
Type of Use	**No. of Outlets**	**Floor space (sqm)**	**No. Of Outlets**	**Floor space (sqm)**
Comparison	8	768.1	9	838.4
Convenience	3	631.1	4	631.1
Retail Service	3	125.7	3	125.7
Leisure Service	9	439.5*	8	386.9*
Financial & Business Service	2	312.2	2	312.2
Health & Medical	2		2	
Public Service	2		2	
Religious Service	1		1	
General Office Use	2		2	
Vacancy	1	70.3	1	52.6
Total	**33**	2346.9	34	2346.9
Notes:				
*** The Regional Assessor does not hold floor space data for Hotels and Public House premises.**				

Table 31: Rothes Diversity of Uses

Summary of Rothes Diversity of Uses Survey				
	2014		2012	
Type of Use	No. of Outlets	Floor space (sqm)	No. Of Outlets	Floor space (sqm)
Comparison	5	494.8	3	241.2
Convenience	4	750.9	4	750.9
Retail Service	2	362.5	3	403.6
Leisure Service	9	153*	8	104.8
Financial & Business Service	4	203.6**	4	693.6
Health & Medical	1		1	
Public Service	4		4	
Religious Service	1		1	
General Office Use	0		0	
Vacancy	3	284	3	284
Total	**33**	2478.1	**31**	2478.1

Retailer Representation

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

Table 32: Smaller Settlements- Retailer Representation

Town	Aberlour	Dufftown	Fochabers	Rothes
Total Retail Goods Shops*	16	22	14	11
No. of National Multiples	1 (6.25%)	3 (13.6%)	2 (14.3%)	3 (27%)

Vacancy Rate

9.6 The overall number and percentage of vacant outlets identified in the centres of Aberlour, Dufftown, Fochabers and Rothes are set out below. The only settlement with a vacancy higher than the 10% average used in Scotland to indicate the relative health of a town centre is Rothes, however there has been no increase in the number of vacant units which was also 3 in 2012. It is noteworthy, that there were no vacancies in Aberlour and only one vacant premise in both Dufftown and Fochabers. Since 2012 there has been a reduction in vacancies in Dufftown. In 2012 4 vacancies were recorded in Dufftown.

Table 33: Smaller Settlements- Vacancy Rates

Town Centre	Total no. of Shops*	No. of Vacant Retail Outlets**	% of Vacant Outlets	Vacant Floor space (sqm)	Approximate Length of Vacant Retail Frontage (Meters)
Aberlour	25	0	0%	0	0
Dufftown	43	1	2.3%	59.2	13
Fochabers	24	1	4.2%	70.3	3
Rothes	23	3	13%	275.6	24

Notes:

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

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

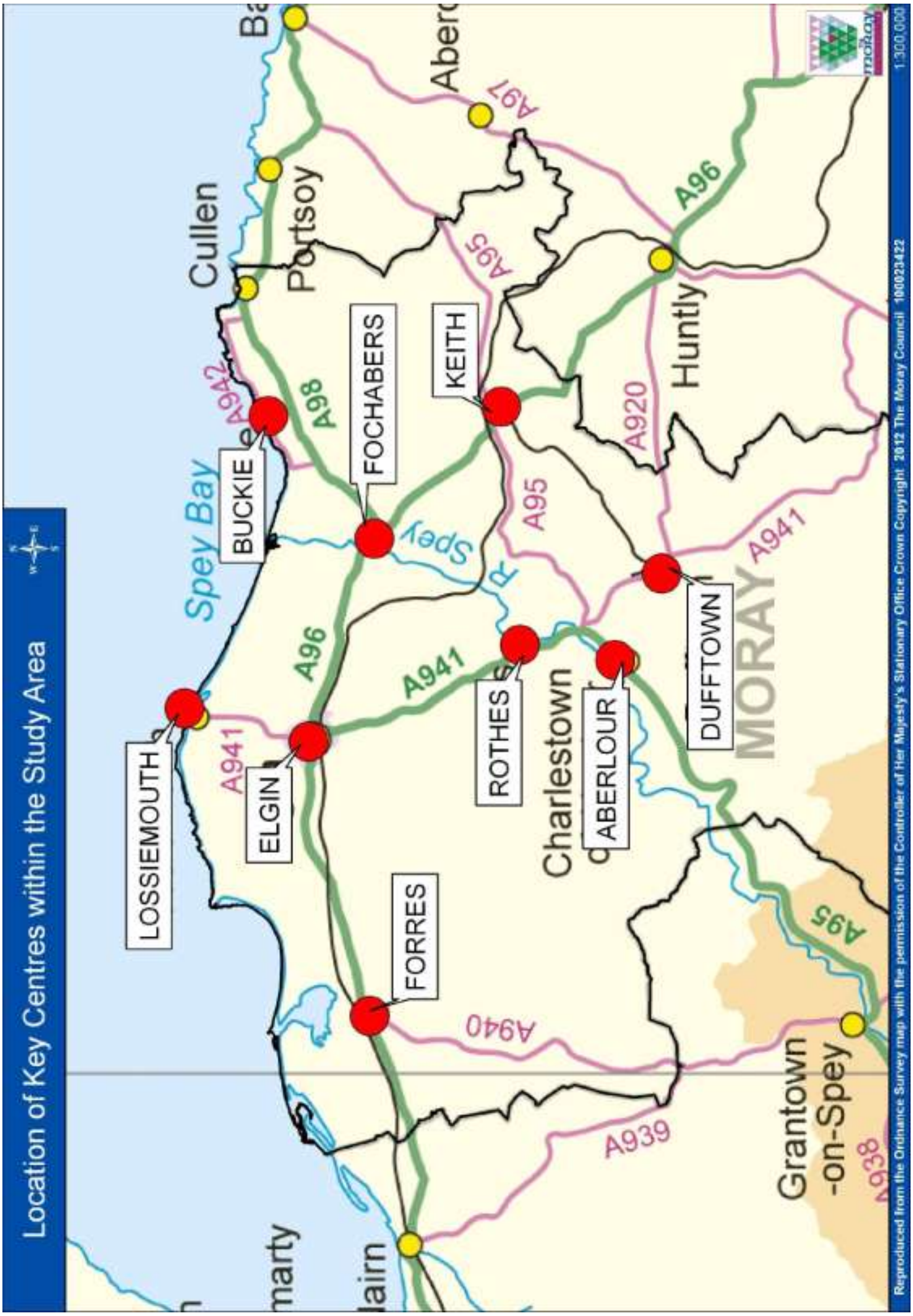
*****Estimate only- missing data from Regional Assessor**

Smaller Settlements Summary

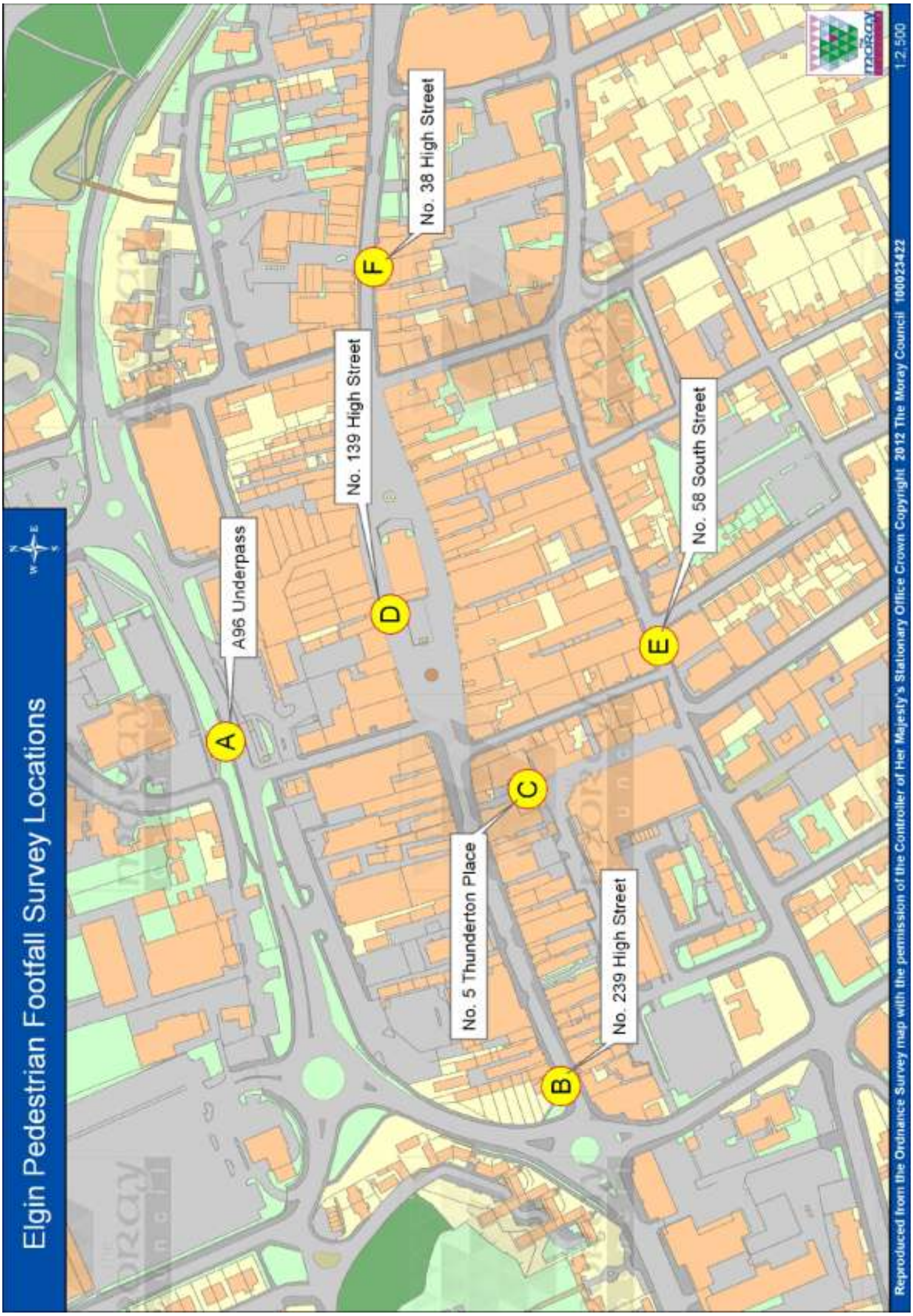
9.7 It is notable that Dufftown has 20 Leisure Service outlets (e.g. restaurants, cafes, hotels and guesthouses etc.) which illustrate the importance of tourism to the centre. Convenience shopping needs are provided for by a number of smaller store units, such as the Co-operative stores in Aberlour, Dufftown and Fochabers. Rothes is serviced by a McColls outlet. Given the scale of these settlements, they are well represented by Financial and Business Services (e.g. retail banks), with two retail banks located Aberlour, one in Dufftown and one in Fochabers. Rothes does not contain a financial institution.

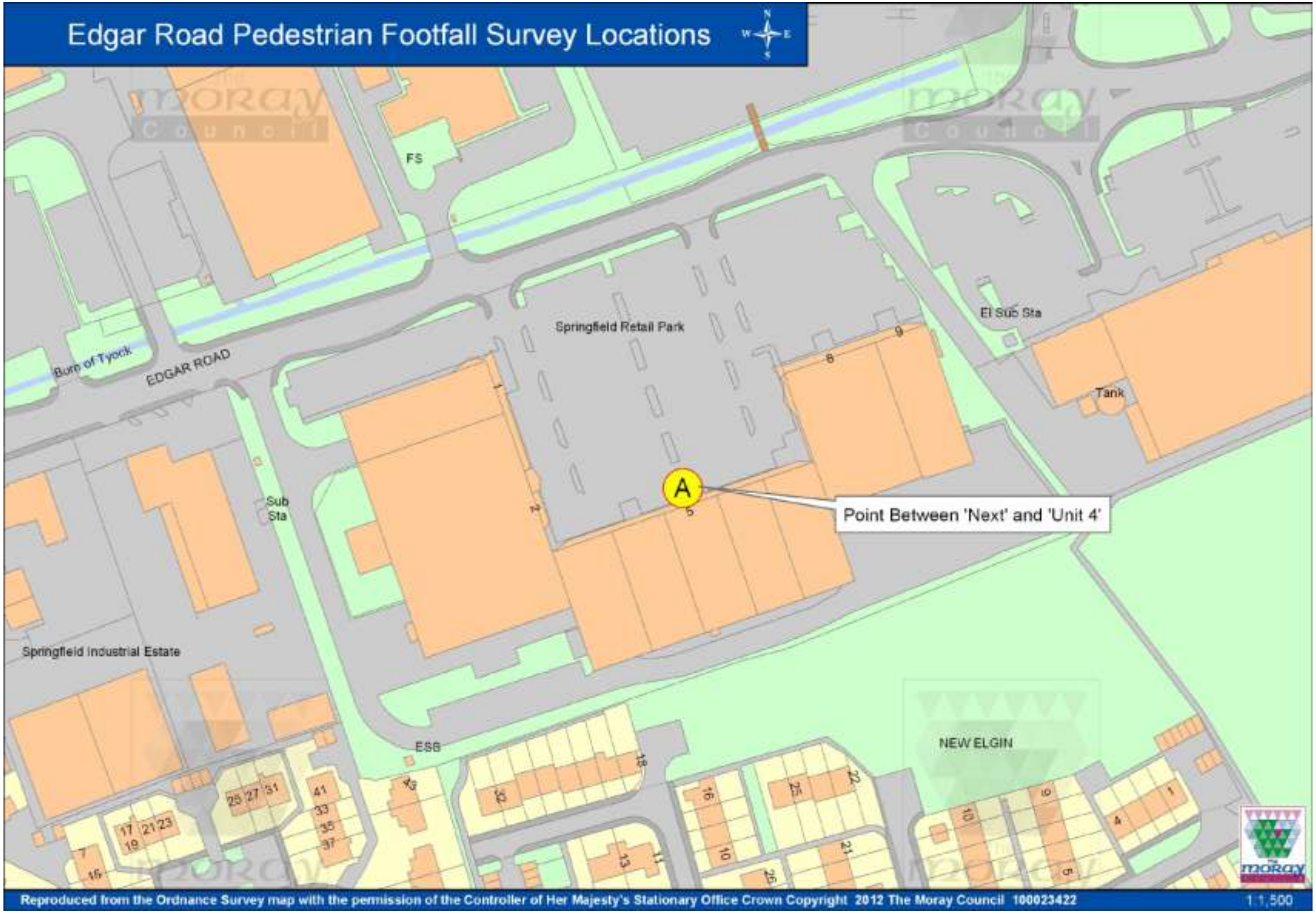
9.8 The vacancy rate in Rothes was 13%, which is above 10% used in Scotland to indicate the relative health of a town centre. However there has been no increase in the number of vacant units since 2012. It is noteworthy, that there was only one vacant premise in both Dufftown and Fochabers and none in Aberlour.

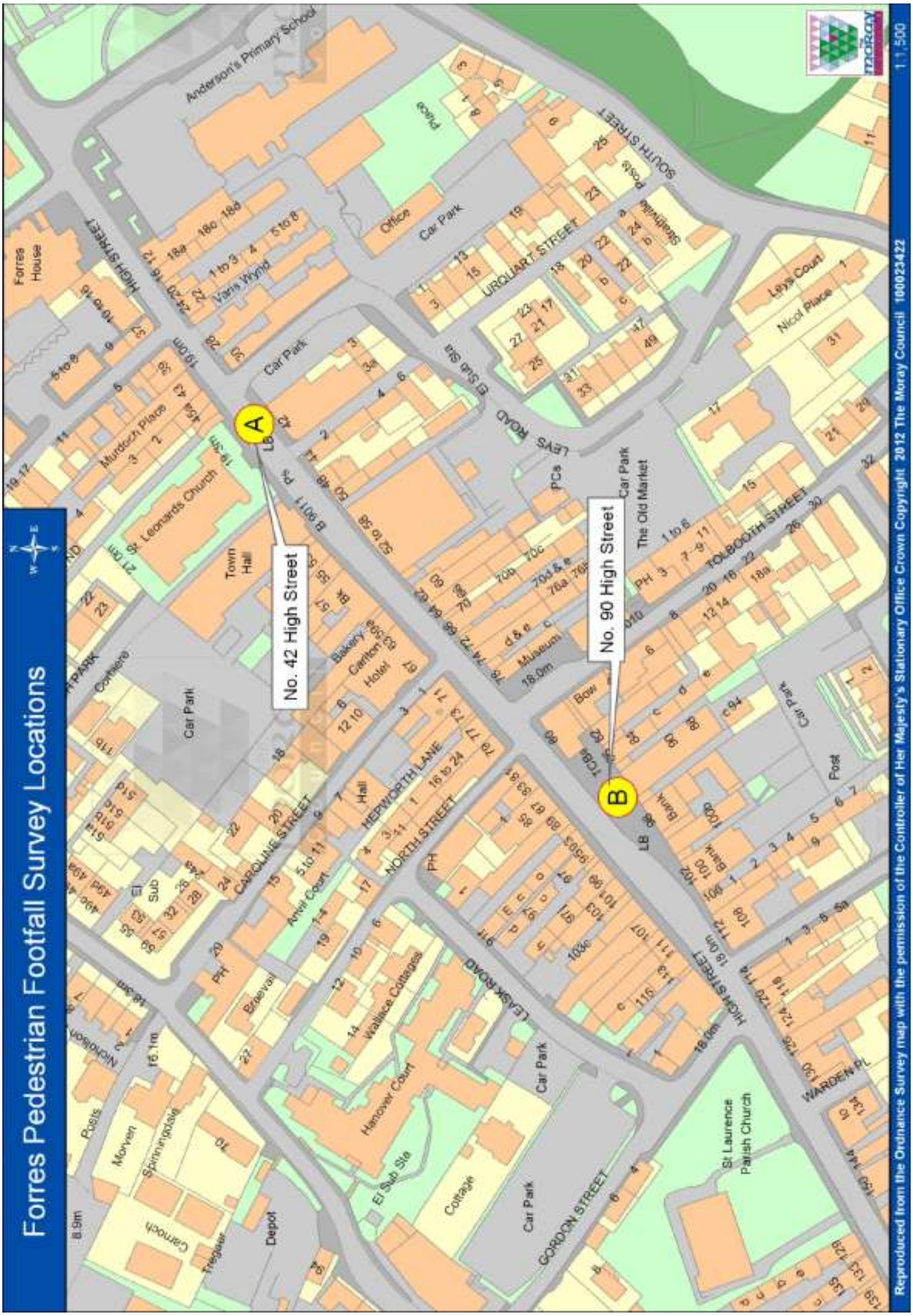
Appendix I: Location of Key Centres



Appendix II: Plans of Footfall Survey Locations




Edgar Road Pedestrian Footfall Survey Locations
Point Between 'Next' and 'Unit 4'
A
Springfield Retail Park
EDGAR ROAD
Burn of Tyock
Springfield Industrial Estate
El Sub Sta
Tank
FS
Sub Sta
ESS
NEW ELGIN
1:1,500


Forres Pedestrian Footfall Survey Locations
A
No. 42 High Street
B
No. 90 High Street
HIGH STREET
Town Hall
St Leonards Church
Anderson's Primary School
Car Park
Museum
The Old Market
TOLBOOTH STREET
URQUHART STREET
SOUTH STREET
LEYS ROAD
NORTH STREET
HEPWORTH LANE
CAROLINE STREET
LEASK ROAD
GORDON STREET
Carlton Hotel
St Laurence Parish Church
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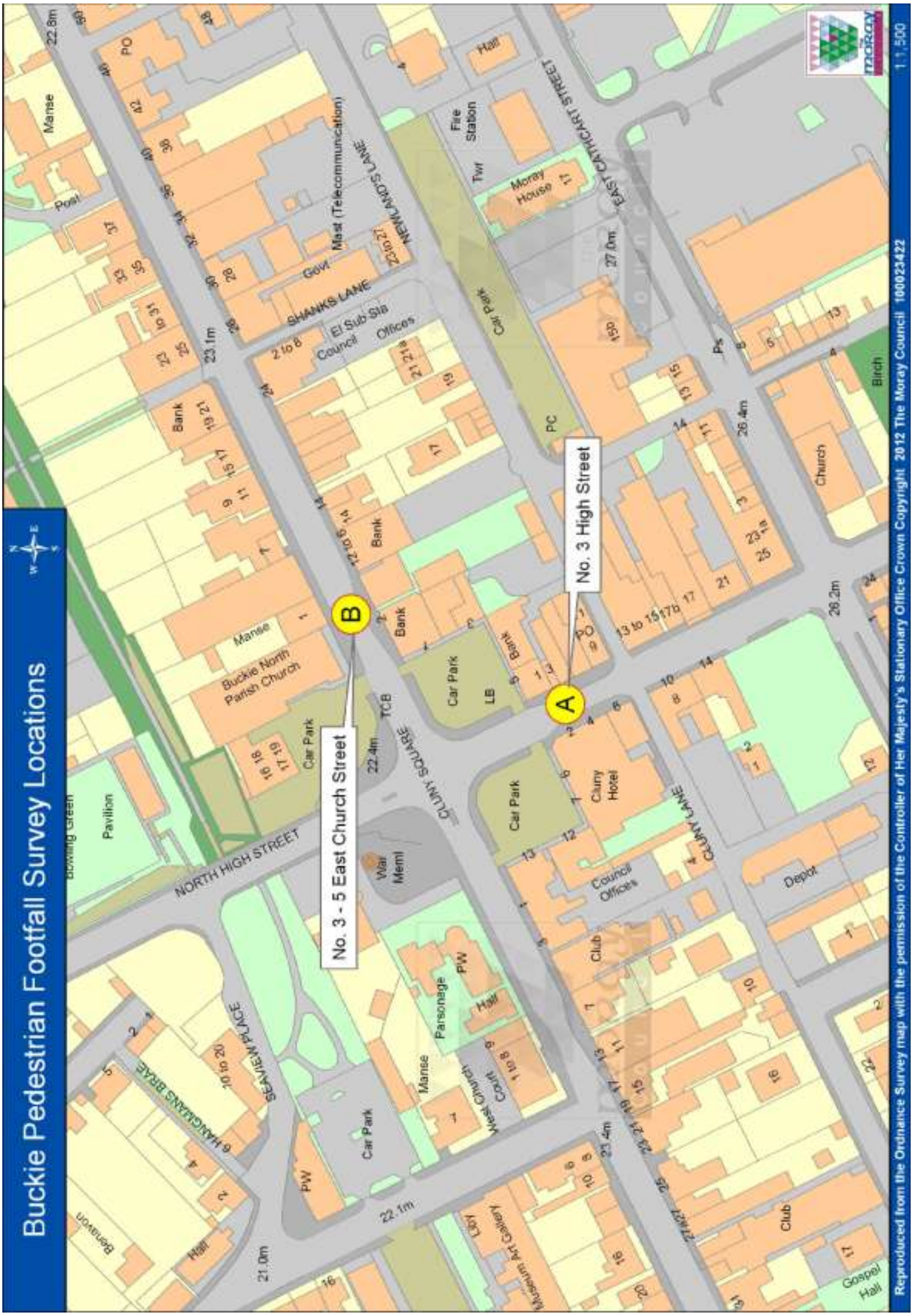
1:1,500

Keith Pedestrian Footfall Survey Locations



Buckie Pedestrian Footfall Survey Locations
A
No. 3 High Street
B
No. 3 - 5 East Church Street
NORTH HIGH STREET
CLUNY SQUARE
SHANKS LANE
NEWLANDS LANE
EAST CATHCART STREET
CLUNY LANE
SEAVIEW PLACE
HANGMANS BRAE
Buckie North Parish Church
Cluny Hotel
Council Offices
War Meml
Car Park
Manse
Parsonage
West Church Court
Museum Art Gallery
Fire Station
Moray House
Depot
Pavilion
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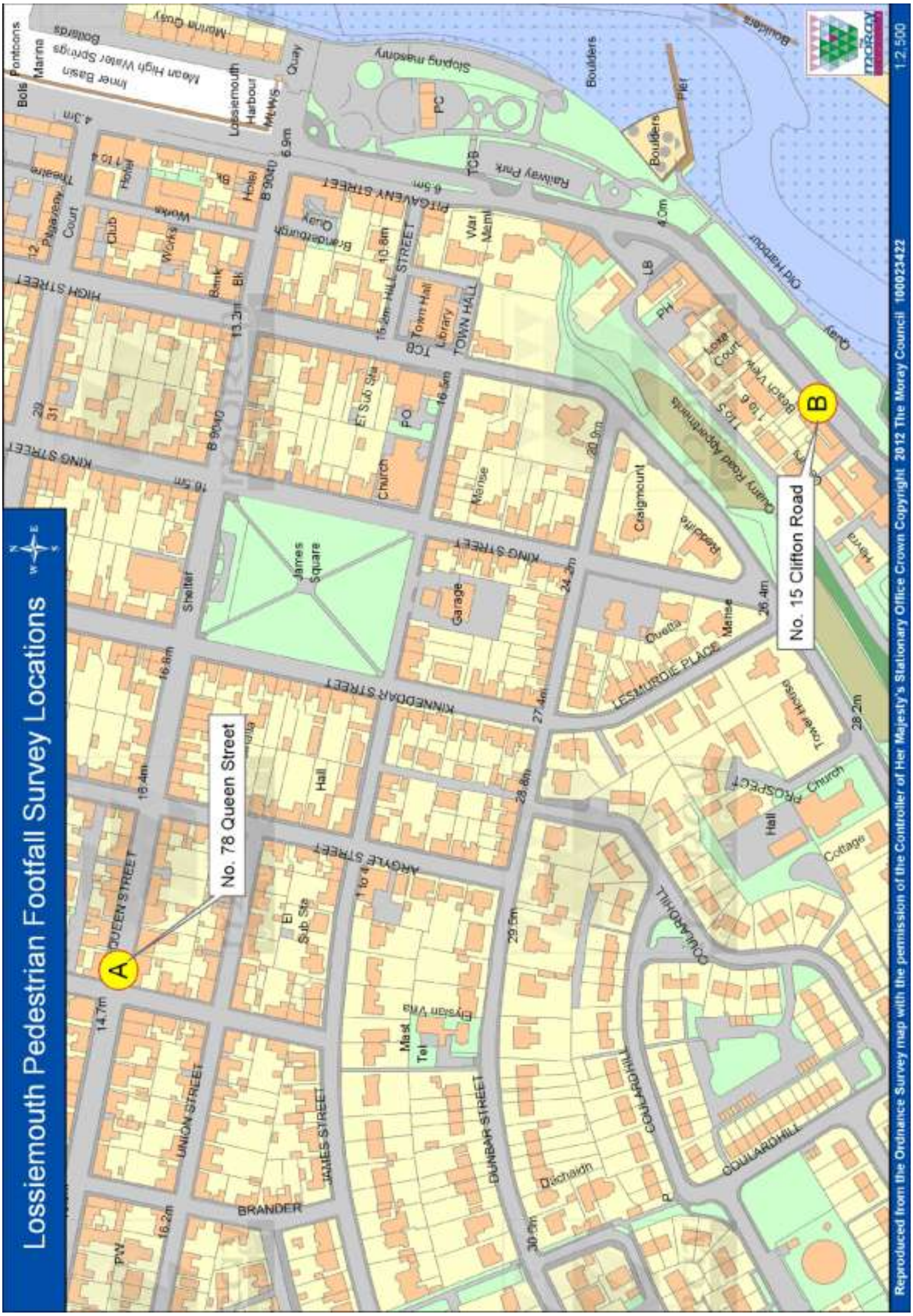
1:1,500



Lossiemouth Pedestrian Footfall Survey Locations
A
No. 78 Queen Street
B
No. 15 Clifton Road
QUEEN STREET
UNION STREET
JAMES STREET
BRANDER
DUNBAR STREET
ARGYLE STREET
KINNEDDAR STREET
KING STREET
HIGH STREET
HILL STREET
PITGAVENY STREET
LESMURDIE PLACE
PROSPECT
COULARDHILL
James Square
Railway Park
Old Harbour
Marina Quay
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1:2,500

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