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**REPORT TO: ECONOMIC DEVELOPMENT AND INFRASTRUCTURE  
SERVICES COMMITTEE ON 15 NOVEMBER 2016**

**SUBJECT: MORAY TOWN CENTRE HEALTH CHECKS 2016**

**BY: CORPORATE DIRECTOR (ECONOMIC DEVELOPMENT,  
PLANNING & INFRASTRUCTURE)**

**1. REASON FOR REPORT**

- 1.1 To report the key findings of the Moray Town Centre Health Checks 2016 and to note that the Planning and Regulatory Services Committee on 1 November 2016 agreed that the Moray Town Centre Health Check Report 2016 will be a material consideration in future retail planning policy and planning application decision making.
- 1.2 This report is submitted to Committee in terms of Section III (E) (3) of the Council's Scheme of Administration relating to exercising the statutory functions of the Council in relation to economic development.

**2. RECOMMENDATION**

- 2.1 **It is recommended that the Committee agree to consider and note:**
- i) the findings of the Moray Town Centre Health Checks Report 2016;**
  - ii) that the Town Centre Health Check Report 2016 will be published on the Planning and Development website pages; and**
  - iii) that the Town Centre Health Checks Report 2016 has been adopted by the Planning and Regulatory Services Committee as a material consideration in future retail planning policy and planning application decision making and to the publication of the report.**

**3. BACKGROUND**

- 3.1 Scottish Planning Policy (SPP) indicates the importance of assessing the performance of town centres through health checks. SPP sets out a range of indicators that may be relevant. Paragraph 64 of SPP states the purpose of the health check is to "assess a town centre's strengths, vitality and viability, weaknesses and resilience. It will be used to inform development plans and decisions on planning applications. Health checks should be regularly updated, to monitor town centre performance, preferably every two years."

- 3.2 A Town Centre Health Check Framework was developed in 2010 in conjunction with Hargest Planning Ltd and has been used to prepare biennial health checks since 2010.
- 3.3 In order to accommodate the Town Centre Health Check within existing workloads and to allow completion of the field work over a shorter period changes have been made to data collection. The primary change has been to change the timing of the pedestrian footfall survey from September to June to bring this closer to the Space in Use Survey and to reduce the footfall surveys from two days (including one Saturday) to one weekday only. Other information not collected includes rate and yield information; crime and safety information; accessibility; environmental quality; and tourism. This has not been collected due to the lack of response from previous surveys or the subjectivity of the assessments. Retailer intentions, consumer surveys and turnover indicators have not been monitored due to the scale and cost of undertaking the survey and need for specialist consultants. Requests for assistance with Town Centre Health Check data collection were made at a Joint Community Council meeting and to the Moray Town Partnership in April 2015 but no volunteers came forward.
- 3.4 The Town Centre Health Check data will:
- Provide an evidence base for use in other studies and strategies;
  - 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 town centres.
- Past health check reports are available on The Moray Council website.
- 3.5 The Moray Council's planning department undertook an assessment of the existing town centres of Elgin, Forres, Keith, Buckie, and Lossiemouth. Limited audits were also undertaken in Aberlour, Dufftown, Fochabers, Rothes and the Edgar Road area of Elgin.
- 3.6 The principle sources of information used are as follows:
- Field surveys undertaken during July 2016 to record the occupier of units and the type of use (Space in Use Survey). The survey of an individual town is completed in a single day.
  - Review of Regional Assessor information on floor space.
  - Pedestrian flow surveys undertaken at the end of June 2016 on a weekday.
- This information is then analysed and assessed against the vitality and viability indicators discussed below
- 3.7 The vitality and viability indicators assessed in the Moray Town Centre Health Check Report 2016 include the following
- Pedestrian flow
  - Diversity of uses
  - Vacancy rates
  - Retailer representation

#### **MORAY TOWN CENTRE HEALTH CHECKS 2016**

- 4.1 The summary below relates to the key findings of the Moray Town Centre Health Check but does not provide a commentary on all the indicators measured.

##### **ELGIN**

- 4.2 Comparison retailing (i.e. clothes, gifts, furniture, chemists etc.) continues to be the dominant use within Elgin town centre, with Leisure uses (i.e. restaurants, cafes, pubs, sports etc.) also making up a large proportion of units. Convenience retailers (i.e. supermarkets, butchers, newsagents etc.) continue to occupy significant floor areas within the defined town centre boundary due to large units such as Tesco, Aldi and Marks and Spencer. There has been a notable movement of existing retailers within the town centre, which in some cases has resulted in new vacancies but does suggest continued confidence in the town centre as a location to do business.
- 4.3 The number of vacant units has decreased by 3 units to 36, giving a vacancy rate of 14.29%. 10% is the average generally used in Scotland to indicate the relative health of a town centre.
- 4.4 The town centre has a good mix of independent and national retailers with just over a third of retailers in the town centre being national multiple retailers.
- 4.5 Footfall has generally fallen across the town centre with the exception being in the east end of the High Street where average hourly pedestrian flow increased by 75 pedestrians/hour. It was also notable that pedestrian flow increased after 2 o'clock when compared to 2014.

##### **EDGAR ROAD**

- 4.6 The Edgar Road area of Elgin continues to provide a significant concentration of comparison retailing, with a large proportion of this being national multiple retailers. Vacancies have remained at the same level as 2014 but vacant floorspace has reduced. The majority of vacancies continue to be within the Elgin Retail Park. There were substantial increases in the average hourly pedestrian flow with this having increased by 110 pedestrians/hour since 2014.

##### **FORRES**

- 4.7 Comparison retailing continues to be the dominant use within the town centre but Leisure uses also make a significant contribution. Retail Service (i.e. salons, post office, dry cleaners etc.) uses add to the mix of uses within the town centre. The number of vacant units has increased by one giving a vacancy rate of 9.28%. The vacant floorspace however has significantly reduced as the former Tesco store has now been demolished. There were mixed results from the footfall survey with the count on 42 High Street (outside Savers) being up on average 9.3 pedestrians/hour but the count at 90 High

Street (outside Boots) was on average lower by 73.3 pedestrians/hour. There were increases in flow towards the end of the day in comparison to 2014.

### **KEITH**

- 4.8 Comparison retailing continues to dominate the town centre but there was an increase in retail services. Vacancies dropped by one unit to 5 bringing the vacancy rate to 6.67%. Pedestrian footfall increased at the entrance to Tesco however average hourly footfall was down 68 pedestrians/hour on the Mid Street count outside the Post Office

### **BUCKIE**

- 4.9 Buckie has continued to perform well with only a small decrease in units occupied by Financial and Business Service uses. Vacancies dropped by 3 units down to 8, giving a vacancy rate of 10.13%. Average hourly footfall fell at both count locations, with the count on the High Street dropping on average by 38 pedestrians/hour and on East Church Street by 46 pedestrians/hour.

### **LOSSIEMOUTH**

- 4.10 Leisure continues to be the dominant use in Lossiemouth and there has been a reduction in comparison retail units. Vacancies have remained the same at 8, giving a vacancy rate of 15.69%. The average hourly pedestrian flow decreased by 12 pedestrians/hour at Queen Street opposite the Co-op but an increase of 24 pedestrians/hour was found on Clifton Road outside Rizza's ices.

### **SMALLER SETTLEMENTS (ABERLOUR, DUFFTOWN, FOCHABERS AND ROTHES)**

- 4.11 The dominant use in Dufftown and Rothes was leisure services (pubs, cafes, restaurants, hotels, sports facilities etc.), whereas in Fochabers and Aberlour both comparison and leisure uses are dominant. In Fochabers and Aberlour, vacancies were the same as 2014 with 1 vacant unit in Fochabers and none in Aberlour. There were 4 vacant units recorded in Dufftown an increase of 3 from 2014 and 2 vacant units in Rothes which is a fall of 1 unit compared to 2014. In all towns, the vacancy rate was below 10% which is the average generally used in Scotland to indicate the relative health of a town centre.

### Summary Table of Key Findings

Town	Comparison		Convenience		Retail Service		Leisure Service		Vacancy		Vacancy Rate %		% of National Multiples	
	2016	2014	2016	2014	2016	2014	2016	2014	2016	2014	2016	2014	2016	2014
Elgin	86	86	18	18	47	45	65	67	36	39	14.29	15.3	34	34
Edgar Road	20	19	2	2	2	3	3	2	5	5	15.63	16	75	79
Forres	29	32	13	15	21	20	25	23	9	8	9.28	8.16	20.63	21
Keith	27	28	13	13	12	9	18	19	5	6	6.67	8	9.6	12
Buckie	28	27	7	7	15	15	21	19	8	11	10.13	13.92	28	30
Lossiemouth	10	12	6	6	9	10	18	16	8	8	15.69	16	8	7.6
Aberlour	7	8	5	4	4	4	9	9	0	0	0	0		
Dufftown	10	10	6	7	4	5	18	20	4	1	9.52	2.3		
Fochabers	7	8	4	3	3	3	9	9	1	1	4.17	4.2		
Rothies	7	5	3	4	2	2	9	9	2	3	8.7	13		

## 5. SUMMARY OF IMPLICATIONS

### (a) **Moray 2026: A Plan for the Future and Moray Corporate Plan 2015 – 2017**

The 10 year plan's top priority is a growing, diverse and sustainable economy. It covers business, employment, infrastructure, public services and developing sustainable communities. Maintaining vital and viable high streets and town centres will contribute to helping achieve the outcomes of the Plan. The town centre health check can provide an evidence base for the development of policies and strategies to support town centres.

### (b) **Policy and Legal**

SPP stresses the importance of monitoring the performance of town centres.

If approved by the Planning and Regulatory Services Committee, the Moray Town Centre Health Check Report 2016 would be a material consideration in any relevant future planning applications.

**(c) Financial implications**

None.

**(d) Risk Implications**

The risk of not monitoring the health of town centres would be an out of date evidence base being used for preparing the next LDP and other strategies.

**(e) Staffing Implications**

The collection and assessment of data has been undertaken by The Moray Council staff. Any implications will be accommodated within existing staff workloads.

**(f) Property**

There are no direct implications arising from this report.

**(g) Equalities**

An Equalities Impact Assessment is not required.

**(h) Consultations**

The Corporate Director (Economic Development Planning & Infrastructure), the Head of Development Services, Paul Nevin (Senior Solicitor), the Equal Opportunities Officer and Moira Patrick (Democratic Services Manager) have been consulted, and comments received have been incorporated into the report.

**6. CONCLUSION**

**6.1 Town Centre Health Checks have been undertaken every two years since 2010 using a framework developed by Hargest Planning Ltd. This has allowed various indicators to be monitored over time. This data can be used as an evidence base for developing policy and strategies to help maintain vital and viable town centres. The 2016 results have seen improvements and decline on some indicators. Generally most town centres provide a wide variety of uses across retailing types with a mix of national and multiple retailers. There have been small increases in vacancies in Forres and Dufftown, with all other centres either showing a decrease in vacancies or maintain 2014 levels. Generally pedestrian footfall decreased across all towns with the exception of Edgar Road, Elgin.**

Author of Report: Rowena MacDougall (Planning Officer)

Background Papers:

Ref: