Moray Town Centre

Health Check Assessment 2023

TOWN CENTRE
HEALTHCHECK

Executive Summary

In 2023, Moray Council undertook a series of Town Centre Health Check assessments.

Assessments were undertaken in the 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.

A Town Centre Perception Survey was also completed in December 2023 for Elgin, Buckie, Keith, Forres, Lossiemouth, Dufftown and Aberlour. The results are shown in section 11.

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.

Summary Table of Key Findings

A summary table of key findings is set out below.

Town	Comparison		Convenience		Retail Service		Leisure Service		Vacancy		Vacancy Rate	
	2023	**2021**	**2023**	**2021**	**2023**	**2021**	**2023**	**2021**	**2023**	**2021**	**2023**	**2021**
Elgin	73	82	18	16	46	55	70	61	40	32	16%	
Edgar Road	20	21	3	2	4	2	3	4	5	7		
Forres	31	29	15	11	24	18	23	21	18	12	16.2%	.
Keith	27	23	12	11	18	14	18	15	7	12	7%	
Buckie	25	27	7	12	17	11	20	23	11	6	13.7%	
Lossiemouth	11	11	8	8	11	12	21	21	5	1	9%	
	2023	**2018**	**2023**	**2018**	**2023**	**2018**	**2023**	**2018**	**2023**	**2018**	**2023**	**2018**
Aberlour	5	7	4	4	5	5	13	10	0	0		
Dufftown	10	7	3	7	8	4	17	19	5	2		
Fochabers	8	9	4	4	2	2	9	9	3	1		
Rothes	3	6	3	3	3	2	9	9	5	3		

2. Vitality & Viability Indicators

This analysis focuses on an assessment of the performance of the '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.

'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 can demonstrate changes in performance.

A brief description of key Vitality and Viability Indicators assessed in this report are provided below.

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. A table showing GOAD categories is included in Appendix III.

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).

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. A measurement of the length of retail frontage that is vacant is also given. This is an indicator of the impact that vacancies have on the appearance and feel of a centre.

Pedestrian Flow – It was not possible to assess pedestrian flow in 2023 due to a lack of reliable data from automatic counters.

3. Moray Retail Study 2021

The 2021 Audit was not completed by Moray Council Planning Officers and was undertaken by Hargest Planning Ltd. as part of the wider Moray Retail Study 2021. Whilst a similar methodology was used there were some differences in how the results were presented. Therefore, some sections refer to changes since the last time MC Planning Officers completed the Town Centre Health Check.

4. Elgin Town Centre Health Check

Since 2018 there have been a number of notable changes across the city centre these include M&Co, Superdrug, Car Phone Warehouse, Shoe Zone, Monsoon and William Hill closing resulting in vacant units during the 2023 assessment. Mountain Warehouse also moved from the centre to Edgar Road creating a vacancy in the St Giles Centre. Other vacancies since 2018 include the bicycle shop and café Muse, Fiona Macleod Hairdressers, the Candy Shop, Ultimate Hair and Beauty, Fones n PCs, and Elgin Community Surgery. Starbucks moving into the former Burton unit has also resulted in a new vacancy on the north of the High Street. Across the city centre there have been a number of vacant units reoccupied including Thorntons by Highland Mobiles and The Bosie moving into the unit vacated by Highland Mobiles. The Deli Nextdoor occupied the former Edinburgh Wool Mill and Nelly Bo's moved into the former Clarks store. Elgin Nail Spa have occupied a long-term empty unit. Highland Bikes, Toytoon, Murray Travel and the Cocktail Joint have also occupied vacant units.

The number of vacant units within Elgin City Centre are the highest since the biennial Town Centre Health Checks commenced in 2010. The level of vacancies is at a level similar to that recorded in 2014.

Diversity of Uses

Survey of the town centre indicates a wide range of different uses and types of property.

The dominant use within Elgin town centre continues to be 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 some of these have large floor areas e.g. Tesco. The town centre includes a range of other local businesses predominantly in the Financial and Business Services sector such as solicitors, accountants, and property agents.

The overall mix of uses and the quantum of floor space they occupy is summarised in the table below with the 2021 results completed by Hargest Planning Ltd as part of the Moray Retail Study and the audit completed by the Council in 2018.

Elgin- Diversity of Uses

Summary of Elgin Diversity of Uses Survey						
	2023		2021 (Completed by Hargest Planning Ltd)		2018	
Type of Use	**No. of Outlets**	**Floor space (sqm)**	**No. Of Outlets**	**Floor space (sqm)**	**No. Of Outlets**	**Floor space (sqm)**
Comparison	73	18847.4	82	28338	90	24299.9
Convenience	18	15440.1	16	10293	19	15728.3
Retail Service	46	4503.4	55	17460	51	4846.5
Leisure Service	70	17392.9	61		65	16331.6*
Financial & Business Service	38	7760.4	26		38	8141.4
Health & Medical	9				11	
Public Service	26				25	
Religious Service	6				5	
General Office Use	24				30	
Vacancy*	40	8986.6	32	6546	25	6127.3*
Total	**350**	**72930.8**			**359**	**75475**

Notes:

* 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. Therefore, vacant banks or estate agents are not included.

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

There are WH Smith, The Works, Trespass, Costa, Starbucks, Farmfoods, TK Maxx national multiple retailers located within Elgin, including Marks & Spencer, and Boots. Site surveys revealed 46 national (Scottish/UK) comparison, convenience, and retail service outlets multiples in the town centre. This is a reduction since 2018 when 54 were recorded. This reflects national trends with large multiple national retailers reducing High Street presence and consolidating this in fewer stores.

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. Since 2018 there has been a growing trend of independent retailers occupying High Street vacancies however this tends to be smaller units on the edge or outwith the Core Retail Area.

Within the defined town centre boundary there are a number of food stores, the largest of which are Tesco on Blackfriars Road, Marks & Spencer's store on High Street and an Aldi store. Both Tesco and M&S have a substantial portion of floor space for Comparison goods as well as Convenience. This has all been classed as 'Convenience' floor space above.

Seven units in the town centre were identified to be charity shops. This is the same level as 2018.

Elgin city centre has one betting office and the only unit resembling a high interest money lender is Ramsden who offer pawnbroking loans.

There are 16 takeaways within the centre which is 6.5% of the total comparison, convenience, retail service and leisure service units. This figure does not include restaurants or cafes which offer a takeaway service in addition to the "sit in" offer.

Vacancy Rate

A site survey by Moray Council planning staff during summer 2023, confirmed the number of vacant units stood at 40[1]. Vacancies account for 16% of the total number of Comparison, Convenience, Retail and Leisure Service units within the centre. This is a significant increase from 2021 when 32 units were recorded. As a rule of thumb 10% is used in Scotland to indicate the relative health of a town centre.

New vacancies since 2018 include national retailers such as M&Co, Superdrug, Car Phone Warehouse, Shoe Zone, Monsoon and William Hill. There are a number of units which have remained vacant for several years including 186 and 188 High Street, 57-61 South Street (Old Junners) and 63 South Street. Within the St Giles Centre there is a notably high level of vacancies, this is the highest level recorded since 2010.

Floor space data indicates that there is approximately 72930sq. m of vacant floor space within Elgin town centre. There is approximately 146m of vacant retail frontage in the town centre (figure obtained by scaling off OS-base plans). This figure equates to approximately

11% 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 increase from 110m in 2018.

5. Edgar Road Health Check

Although not part of Elgin town centre, the Edgar Road area (including the Elgin Retail Park and Springfield Retail Park) is a major commercial centre and a key focus for substantial retail activity. Changes since 2018 have included Mountain Warehouse moving into the former New Look Store, Food Warehouse opening and the NHS using one of the units at Elgin Retail Park as a vaccination centre.

Diversity of Uses

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 Asda, the Food Warehouse and Allarburn Dairy which make up a significant proportion of the area's floor space.

Edgar Road Diversity of Uses

	Summary of Edgar Road Diversity of Uses Survey			
	2023		**2018**	
Type of Use	**No. of Outlets**	**Floor space (sqm)**	**No. of Outlets**	**Floor space (sqm)**
Comparison	20	21699.8	21	21171.76
Convenience	3	13325.86	2	12386.8
Retail Service	4	1481.3	2	547.2
Leisure Service	3	665.7	4	1182.06
Financial & Business Service	3	1232.5	3	1232.5
Health & Medical	2		1	
Public Service	1		1	
Religious Service			0	
General Office Use			0	
Vacancy	5	3050.21	7	4247.44
Total	**42**	**41455**	**41**	**40767.76**

Retailer Representation

There are 21 national (Scottish/UK) multiples in the Edgar Road Area, and they are the dominant use within the Springfield and Elgin Retail Parks.

Vacancy Rates

The number of vacant units identified by Moray Council planning staff was five, which is a decrease of two unit compared to 2018. Floor space data obtained from previous planning application documents indicates that there is approximately 3050 sqm of vacant floor space in the Edgar Road area.   All of the Lithe vacant units are within the Elgin Retail Park.

6. Forres Town Centre Health Check

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 creates a pleasing-built realm for shoppers however the deterioration of some properties effects perceptions of the town centres health. 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 biggest change across the High Street has been an increase in cafes and restaurants with new occupiers such as Café 1496, Forres Tandoori and The Wok Inn. There is also an increase in the number of home décor and gift shops including Home Comforts, Finishing Touches and The Tortoise Workshop. Other new occupiers have included MacGregor Memorials, Alberto Ricci, Murray Travel and Julie’s pet Grooming. However, vacancies have increased to eighteen units, with few of these being the same as previous years. The condition of some of the longer-term vacant units has a negative impact on the perceptions of the town’s health.

Diversity of Uses

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 Leisure and Public Services located within Forres town centre.

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

Diversity of Uses Forres

Summary of Forres Diversity of Uses Survey						
	2023		2021 (Completed by Hargest Planning Ltd)		2018	
Type of Use	No. of Outlets	Floor space (sqm)	No. of Outlets	Floor space (sqm)	No. of Outlets	Floor space (sqm)
Comparison	31	5067.9	29	4455	28	4714.8
Convenience	15	1933	11	1840	15	2268.9
Retail Service	24	1683	18	4591	27	2489.6
Leisure Service	23*	1232.6	21*		23	1292.3
Financial & Business Service	9	3410.7	8		14	4491.1
Health & Medical	4		-		5	
Public Service	10		-		14	
Religious Service	3		-		3	
General Office Use	4		-		6	
Vacancy*	18	1758.1	12	1084	3	834.7
Total	**141**	**150853**			**138**	**16091.4**

Notes:

* 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. Therefore, vacant banks or estate agents are not included.

Retailer Representation

There are 14 national (Scottish/UK) multiples including Boots and Co-op in the town centre. Five units within the town centre were identified to be charity shops which is comparable to 2018. Much of Forres's character comes from its independent retail provision.

No betting offices or high interest money lending were identified during the assessment.

There are seven takeaways within the centre which is 6.3% of the total comparison, convenience, retail service and leisure service units. This figure does not include restaurants or cafes which offer a takeaway service in addition to the “sit in” offer.

Vacancy Rates

The number of vacant units identified was 18, which is a vacancy rate of 16.2%, this is highest vacancy rate recorded since biennial town centre health checks started in 2010. This is an increase from 2021 recorded by Hargest Planning Ltd in 2021 and a substantial increase from the three recorded in 2018 by planning officers. Notable new vacancies since 2018 include Washingtons, Sues’s News, Stuart Cycle, Lees Wealth Management and Ladbrokes. Non-retail vacancies and the appearance of buildings impacts negatively on the perception of the health of the town centre.

Floor space data indicates that there is approximately 1758sqm of vacant floor space in Forres town centre. Again, this is a substantial increase from just 305sqm in 2018. There is approximately 67m of vacant retail frontage in the town centre (figure obtained by scaling off OS-base plans). This figure equates to approximately 9% 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 almost double the 2018 measurement of 35m.

7. Keith Town Centre Health Check

Keith has shown improved signs of vitality plus viability with vacancy levels relatively steady and new occupancy of shops. Examples include Inspired Living occupying the former Third Brothers unit, Kelpie Games occupying the former Be So Crafty shop, Blue Violet occupying the former Maid by Grandma shop, a cleaning company occupying the former Clark Thomson insurance brokers and Gray’s of Keith being reoccupied by antique store. Noticeable non- retail vacancies include the former Council Access point office, and Bank of Scotland.

Diversity of Uses

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.

Keith Diversity Uses

Summary of Keith Diversity of Uses Survey						
	2023		**2021** (Completed by Hargest Planning Ltd)		**2018**	
Type of Use	**No. of Outlets**	**Floor space (sqm)**	**No. of Outlets**	**Floor space (sqm)**	**No. of Outlets**	**Floor space (sqm)**
Comparison	27	5373.7	23	4051	26	4497.9
Convenience	12	1393.5	11	1497	13	1422.7
Retail Service	18	1305.9	14	3951	13	1026.10
Leisure Service	18	1028.8	15		19	910.9
Financial & Business Service	9	1220	8		11	1191.2
Health & Medical	1				1	
Public Service					1	
Religious Service	1				1	
General Office Use	3				5	
Vacancy*	7	706	12	1925	9	1688.6
Total	**96**	**11027.9**			**99**	**10737.4**

Notes:

* 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. Therefore, vacant banks or estate agents are not included.

Retailer Representation

There are seven national (Scottish/UK) multiples including Spar and Harry Gows in the town centre which is comparable to 2018. Keith has a strong independent sector with the majority of shops being local stores with a distinct identity. Two units within the town centre were identified to be charity shops and this is the same as 2018.

No betting offices or high interest money lending were identified during the assessment.

There are 5 takeaways within the centre which is 6% of the total comparison, convenience, retail service and leisure service units. This figure does not include restaurants or cafes which offer a takeaway service in addition to the “sit in” offer.

Vacancy Rate

The number of vacant units identified was seven, which is a vacancy rate of 8.5% - this is lower than the 10% average used in Scotland to indicate the relative health of a town centre. This lower that the vacancies in 2021 and 2018 when vacancies of 12 and 9 were recorded respectively.

Floor space data indicates that there is approximately 771.3sqm of vacant floor space in Keith. There is approximately 58.5m of vacant retail frontage in the town centre (figure obtained by scaling off OS-base plans). This figure equates to approximately 6% of the retail frontage on the traditional shopping street in Keith, which is Mid Street. This is a decrease from 96m reported in 2018.

8. Buckie Town Centre Health Check

In Buckie there have been several changes across the town centre since 2018, including closure of M&Co and Rs McColl’s. Curiosities and Master Phones and Vapes closing also resulted in vacancies. Bank closures have also impacted on the town centre.

Diversity of Uses

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 below.

Buckie Diversity of Uses

Summary of Buckie Diversity of Uses Survey						
	2023		2021 (Completed by Hargest Planning Ltd)		2018	
Type of Use	**No. of Outlets**	**Floor space (sqm)**	**No. of Outlets**	**Floor space (sqm)**	**No. of Outlets**	**Floor space (sqm)**
Comparison	24	4413	27	6161	27	4963.5
Convenience	7	2243.9	12	3413	8	2267.8
Retail Service	17	1584.1	11	4693	16	1533.5
Leisure Service	20	2437.9	23		20	2235.7
Financial & Business	8	1391.9	7		10	1603.2

Service						
Health & Medical	5				5	
Public Service	9				5	
Religious Service	4				4	
General Office Use					2	
Vacancy*	11	1928	6	724	10	610.9
Total	**105**	**13871.8**			**107**	**14402.5**
Notes: * 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. Therefore, vacant banks or estate agents are not included.						

Retailer Representation

There are 11 national retail goods/services shops (Scottish/UK) including Co-op, Savers, and Hays Travel multiples in the town centre. This is drop from 13 in 2018. Three units were identified to be charity shops which is the same as 2018.

One betting office was identified in the assessment. No high interest money lending units were identified.

There are seven takeaways within the centre which is 8.7% of the total comparison, convenience, retail service and leisure service units. This figure does not include restaurants or cafes which offer a takeaway service in addition to the "sit in" offer.

Vacancy Rate

The number of vacant units identified was 11, which is a vacancy rate of 14%. This is one unit higher than 2018 and is above the 10% commonly used in Scotland to indicate the relative health of a town centre.

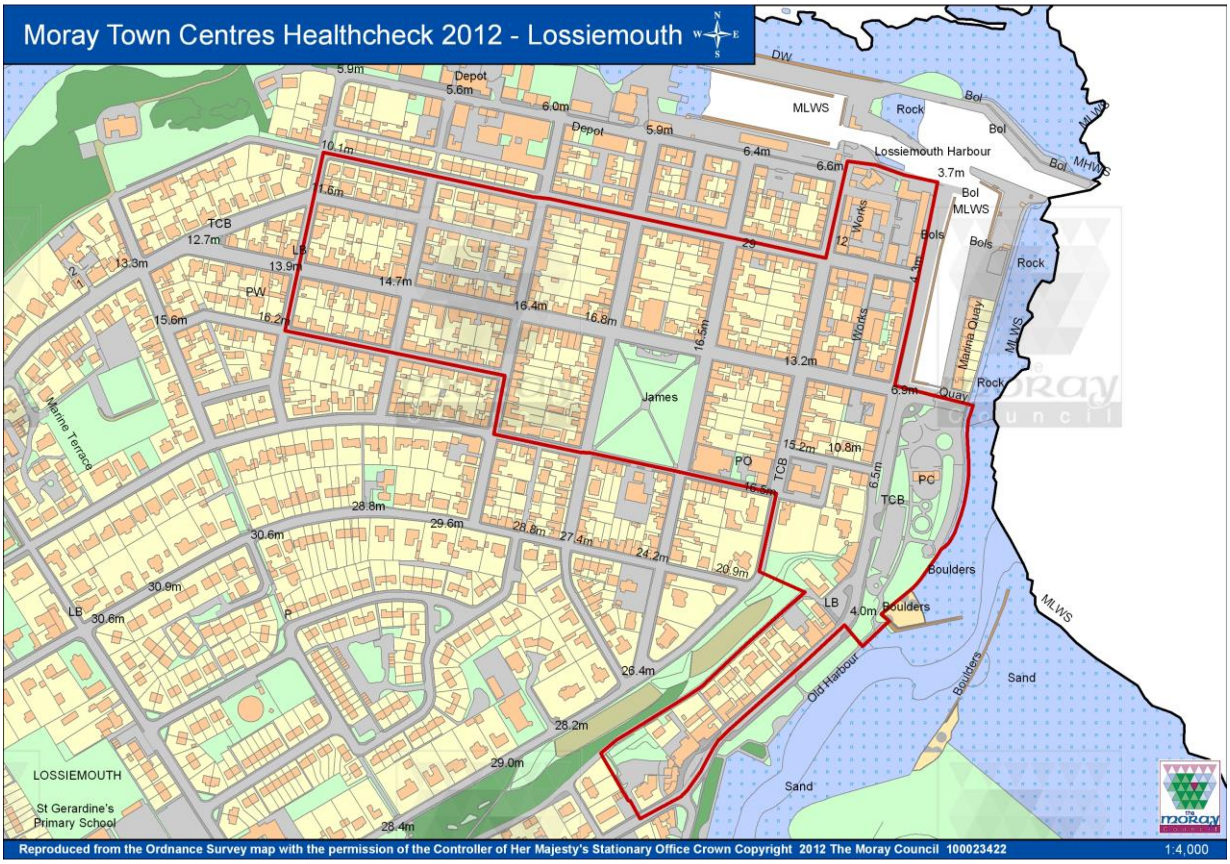
Floor space data indicates that there is approximately 1928sqm of vacant floor space in Buckie town centre. There has been an increase in the vacant floor space. There is approximately 87m of vacant retail frontage in the town centre (figure obtained by scaling off OS-base plans). This is a small decrease compared to 2018 when 89m was measured. This figure equates to approximately 9% 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).

9. Lossiemouth Town Centre Health Check

There are few national multiple retailers and independent retailers predominate in Lossiemouth. In addition to retailing the centre is also a popular destination for tourists with a number of buildings offering tourist attractions. 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. The number of vacant units identified was five.

Diversity of Uses

Lossiemouth does not contain a defined 'town centre', within the Moray Local Development Plan 2020 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*).



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

Lossiemouth Diversity of Uses

Summary of Lossiemouth Diversity of Uses Survey						
	2023		2021 (Completed by Hargest Planning Ltd)		2018	
Type of Use	**No. of Outlets**	**Floor space (sqm)**	**No. of Outlets**	**Floor space (sqm)**	**No. of Outlets**	**Floor space (sqm)**
Comparison	11	907.9	11	882	10	2164.7
Convenience	8	1841.3	8	989	6	576
Retail Service	11	775.4	12	3404	12	933.1
Leisure Service	21	2531.7	21		21	1639
Financial & Business Service	3	611.7	2		4	816.5
Health & Medical	2				2	
Public Service	3				5	
Religious Service	1				2	
General Office Use	1				1	
Vacancy*	5	600.5	1	81	5	225.8
Total	**61**	**7154.3**			**68**	**6355.1**

Notes:

* 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. Therefore, vacant banks or estate agents are not included.

Retailer Representation

There are two national retail goods/service shops (Scottish/UK) multiples including Co-op and Right Medicine in the town centre which is comparable to 2018. There are no charity shops, betting shops or high interest lenders.

There are seven takeaways within the centre which is 12% of the total comparison, convenience, retail service and leisure service units. This perhaps reflects the concentration of tourism facilities in Lossiemouth and also the extensive town centre boundary due to the concentration of uses on Clifton Road and along Queen Street. This figure does not include restaurants or cafes which offer a takeaway service in addition to the “sit in” offer.

Vacancy Rate

The number of vacant units identified by Moray Council planning staff was five, which is a vacancy rate of 9%. This is an increase from 1 identified by Hargest Planning Ltd in 2021 but the same as identified by Moray Council planning staff in 2018. This is below the 10% rule of thumb used in Scotland to indicate the relative health of a town centre. New vacancies include D&I Tropical, opticians on Queen Street, and the former Co-op which was vacated when the store moved to St James Square.

Floor space data obtained from the Regional Assessor indicates that there is approximately 600sqm of vacant floor space in the Lossiemouth study area. This is a significant increase compared to the floor area in 2018 and likely due to the former Co-op unit becoming vacant when the store moved.

10. Smaller Settlements Health Check

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

The overall mix of uses and the quantum of floor space is summarised in the table below along with the 2018 results. It is notable that Dufftown has 17 Leisure Service outlets (e.g. restaurants, cafes, hotels, and guesthouses etc). This illustrates the importance of tourism to the centre.

Other than specialist stores the main-stream comparison retail range in these smaller settlements is very limited. Convenience shopping needs are provided for by a number of smaller stores, such as the Co-operative stores in Aberlour, Dufftown and Fochabers. Rothes is serviced by a Keystore and Morrisons.

Aberlour Diversity of Uses

Summary of Aberlour Diversity of Uses Survey				
	2023		2018	
Type of Use	**No. of Outlets**	**Floor space (sqm)**	**No. of Outlets**	**Floor space (sqm)**
Comparison	5	327	7	613
Convenience	4	666.7	4	666.7
Retail Service	5	1719.9	5	1665.2
Leisure Service	13	806.3	10	572.9
Financial & Business Service	3	286.1	2	191.1
Health & Medical	2		2	
Public Service	4		4	
Religious Service	1		1	
General Office Use			0	
Vacancy*	0		1	70.1
Total	**37**	**3806**	**36**	**3779**

Notes:

* 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. Therefore, vacant banks or estate agents are not included.

Dufftown Diversity of Uses

Summary of Dufftown Diversity of Uses Survey				
	2023		2018	
Type of Use	No. of Outlets	Floor space (sqm)	No. of Outlets	Floor space (sqm)
Comparison	10	399.3	7	291.8
Convenience	3	607.5	7	825.7
Retail Service	8	603.5	4	599.2
Leisure Service	17	1174	19	1403.5
Financial & Business Service	4	912.2	4	881.5
Health & Medical				
Public Service	3		3	
Religious Service				
General Office Use	1			
Vacancy*	5	346.1	2	93.8
Total	**51**	**4042.6**	**46**	**4095.5**

Notes:

* 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. Therefore, vacant banks or estate agents are not included.

Fochabers Diversity of Uses

Summary of Fochabers Diversity of Uses Survey				
	2023		2018	
Type of Use	**No. of Outlets**	**Floor space (sqm)**	**No. of Outlets**	**Floor space (sqm)**
Comparison	8	737.1	9	810.5
Convenience	4	663.7	4	287.5
Retail Service	2	76.5	2	78.5
Leisure Service	9	341.7	9	439.5
Financial & Business Service	1		1	197.8
Health & Medical	1		2	
Public Service	2		2	
Religious Service	1		1	
General Office Use	2		2	
Vacancy*	3	212	1	343.6
Total	**33**	2031	33	2157.4

Notes:

* 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. Therefore, vacant banks or estate agents are not included.

Rothes Diversity of Uses

Summary of Rothes Diversity of Uses Survey				
	2023		2018	
Type of Use	**No. of Outlets**	**Floor space (sqm)**	**No. Of Outlets**	**Floor space (sqm)**
Comparison	3	337	6	276
Convenience	3	474.9	3	474.9
Retail Service	3	403.6	2	362.5
Leisure Service	9	104.8	9	153
Financial & Business Service	4	838.1	4	203.6
Health & Medical	1		1	
Public Service	6		6	
Religious Service	1		1	
General Office Use				
Vacancy*	5	433.8	3	275.6
Total	**35**	**2592.2**	**35**	**1745.6**

Notes:

* 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. Therefore, vacant banks or estate agents are not included.

Retailer Representation

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

Smaller Settlements- Retailer Representation

Town	Aberlour	Dufftown	Fochabers	Rothes
No. of National Multiples	1	2	2	2

11. Town Centre Perception Survey

A total of 646 visitors to seven towns in Moray responded to the online Town Centre Perception Survey in December 2023. The town centres chosen for the survey were Aberlour, Buckie, Dufftown, Elgin, Forres, Keith and Lossiemouth.

The survey asked people six questions: the town centre they wished to respond for, to rate various aspects of the town centre, their reasons for visiting, what needs improving and a free-text question for comments.

The survey permitted more than one response per person in case they wished to respond about more than one town. Note that although 646 responses were received, only 409 unique visits were recorded to the survey page; it is not possible to differentiate between many people using one site (IP address), such as the library or in the same household, or one person responding about more than one town. Each response is therefore considered uniquely.

11.1. Number of responses by town

Towns and responses about them are shown below, along their populations (figure 1). Note that the population is for comparison purposes only.

- Dufftown received a relatively low number of responses compared to its population.
- Not surprisingly most feedback was about Elgin with 449 responses (nearly 70% of the total), over twice as many as the other six towns put together.

The next most popular town for the survey was Forres (14%), followed by Buckie and then Lossiemouth. Aberlour, Dufftown and Keith each received 2% or less of the total.

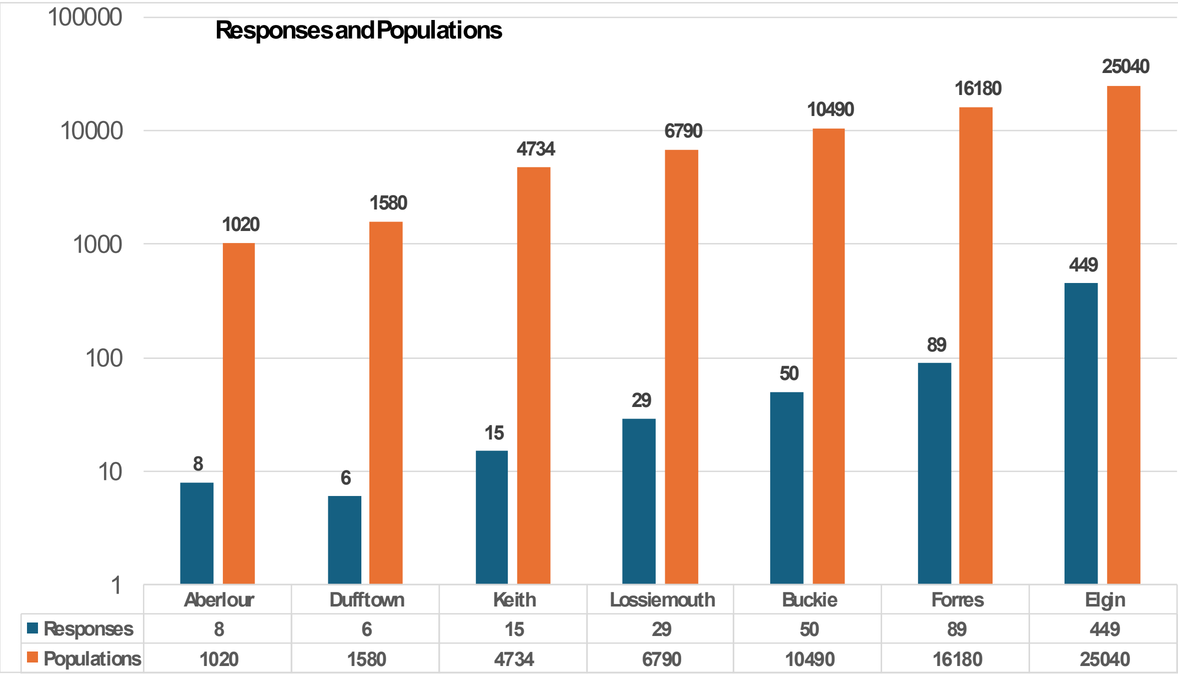


Figure 1

Population mid-2021 estimates from https://www.citypopulation.de/en/uk/scotland/S12000020__moray/

11.2. Frequency of visits

Question 2 asked how often resondents visit their chosen town. Smaller towns received more frequent visits than larger towns (highlighted blue). Some residents of smaller towns will pay visits to larger towns which could account for Elgin having a spread of frequencies, with an equal number saying they visited daily a few times a month. Except for Elgin, most people said they visited their chosen town centre once a week or more often than once a week.

Frequency	Aberlour	Buckie	Dufftown	Elgin	Forres	Keith	Lossie
Daily	4	22	4	86	23	7	12
A few times a week	1	19	2	147	45	5	10
Once a week	1	7	0	68	13	2	3
A few times a month	1	1	0	86	6	0	2
Monthly	0	1	0	34	0	1	1
Less frequently	1	0	0	28	2	0	1
Total	8	50	6	449	89	15	29

Table 1

11.3. Town Centre Ratings

Question 3 asked people to rate ten aspects of the town centre by giving a score out of five, results shown in Tables 2 and 3.

The 'maximum score' is the greatest possible score which could be received for that town, taking into account the number of respondents for that town. It is calculated as follows. In a theoretical scenario if everyone gave the highest rating for their chosen town centre, that is a score of 5 to each of the 10 aspects, this would give a maximum score of 10 x 5 = 50 points per aspect. This is multiplied by the responses for that town to give the maximum. For instance, 10 x 5 x 50 = 2500 for Buckie, the figure in Table 2.

Table 3 breaks down the aspect by percentage. It is calculated as follows, taking the maximum score per aspect divided by the total responses for the town. For example, public transport in Buckie 142/ ((50 points per aspect) x 50) = 142/500 = 56.8%. The colours of the boxes were decided thus: green for 70% or above (good), orange for 50% and 69% (fair) and red for 50% and below.

The TOTAL for each town in Table 3 was calculated by dividing the TOTAL by the max score in Table 2.

	Aberlour	Buckie	Dufftown	Elgin	Forres	Keith	Lossiemouth
Number of responses	8	50	6	449	89	15	29
Aspect/Max score	2500	300	22450	4450	750	1450	32300
Retail offering	31	103	14	813	213	44	76
Evening economy	24	88	9	1103	209	28	64
Daytime events	20	74	17	898	173	20	40
Pleasance & Attractiveness	29	151	14	841	302	31	87
Access by public transport	22	142	8	1088	250	46	75
Access by active travel	26	159	15	1304	317	38	78
Access by car	31	167	16	1207	334	52	86
Accessible for all	32	175	22	1349	333	52	89
Safety	35	162	18	1289	325	50	104
Cleanliness	34	140	16	1049	309	40	89
TOTAL	284	1361	149	10941	2765	401	788

Table 2 - Scores for the 10 aspects of each town

	Aberlour	Buckie	Dufftown	Elgin	Forres	Keith	Lossiemouth
Number of responses	8	50	6	449	89	15	29
Retail offering	77.5%	41.2%	46.7%	36.2%	47.9%	58.7%	52.4%
Evening economy	60.0%	35.2%	30.0%	49.1%	47.0%	37.3%	44.1%
Daytime events	50.0%	29.6%	56.7%	40.0%	38.9%	26.7%	27.6%
Pleasance & Attractiveness	72.5%	60.4%	46.7%	37.5%	67.9%	41.3%	60.0%
Access by public transport	55.0%	56.8%	26.7%	48.5%	56.2%	61.3%	51.7%
Access by active travel	65.0%	63.6%	50.0%	58.1%	71.2%	50.7%	53.8%
Access by car	77.5%	66.8%	53.3%	53.8%	75.1%	69.3%	59.3%
Accessible for all	80.0%	70.0%	73.3%	60.1%	74.8%	69.3%	61.4%
Safety	87.5%	64.8%	60.0%	57.4%	73.0%	66.7%	71.7%
Cleanliness	85.0%	56.0%	53.3%	46.7%	69.4%	53.3%	61.4%
TOTAL	71.0%	54.4%	49.7%	48.7%	62.1%	53.5%	54.3%

Table 3 - Percentages for each aspect of the towns

Highest						**Lowest**
Aberlour	Forres	Buckie	Lossiemouth	Keith	Dufftown	Elgin

Figure 2

- Aberlour has the highest overall score (71%) although it is noted only eight people responded.
- Elgin had the lowest overall score (48.7%), Lossiemouth in the middle.
- Public transport was rated best in Keith, worst in Elgin.
- No town attained a good score for daytime events although Elgin was the highest after Aberlour.
- None of the towns received a good rating for their evening economy.
- Access by any means of transport was rated highly in Forres.
- Forres and Lossiemouth scored well for safety, Dufftown worst although the response rate was low.
- Accessibility was rated fair or good in all towns.

Note that 'Accessible for all and easy to find your way around' is regarded as getting around once the visitor has arrived in the town centre, as distinct from mode of transport (and how accessible or not that is) to get to the town.

11.4. Main reasons for visiting

Question 4 asked people the main reason for visiting their chosen town centre. The pie chart size reflects the number of responses for the town in figure 3 (table 4 underlying figures).

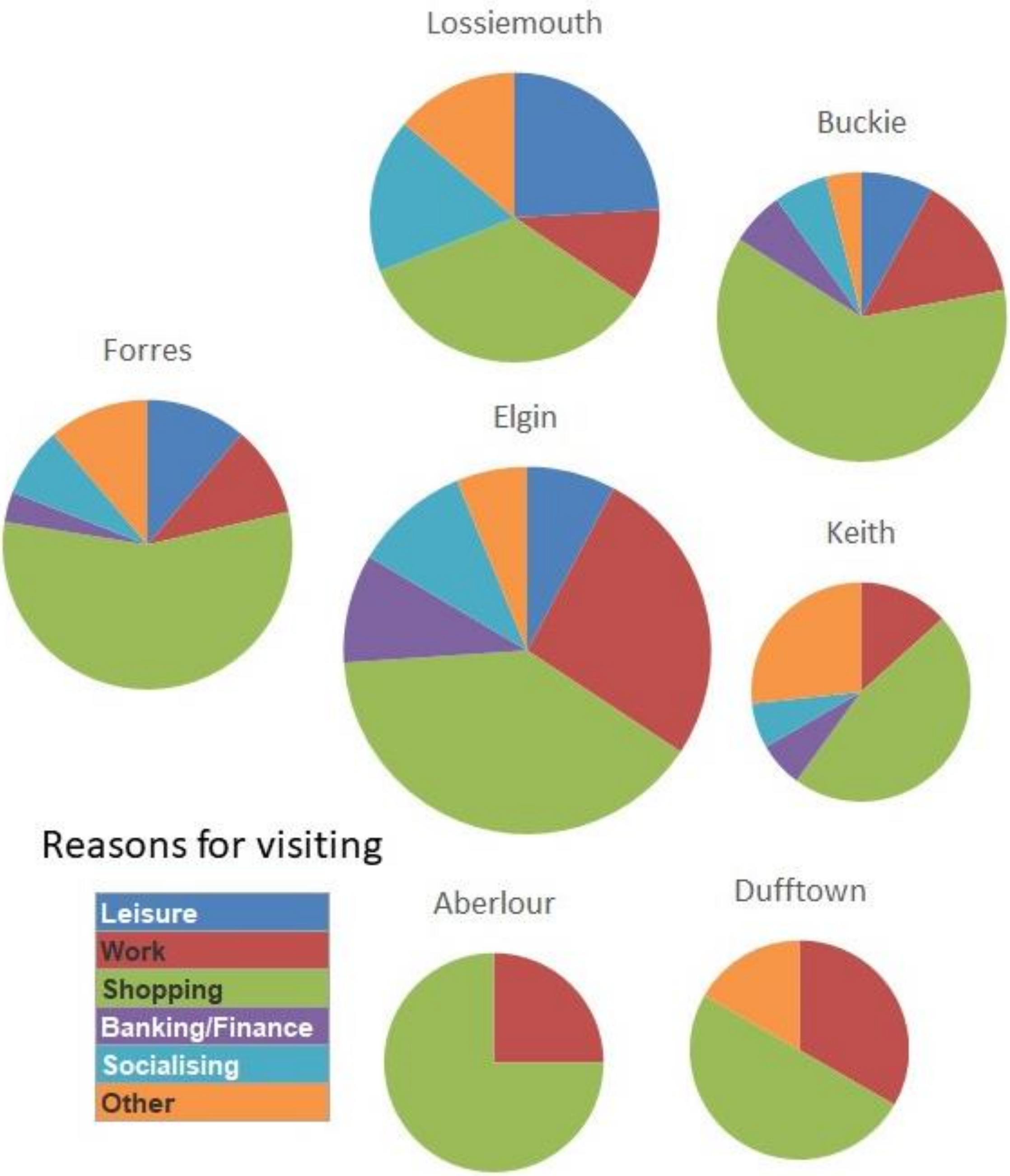


Figure 3

	Aberlour	Buckie	Dufftown	Elgin	Forres	Keith	Lossiemouth	Totals
Leisure	0	4	0	35	10	0	7	56
Work	2	7	2	119	9	2	3	144
Shopping	6	31	3	178	50	7	10	285
Banking/Financ	0	3	0	43	3	1	0	50
Socialising	0	3	0	46	7	1	5	62
Other (please s	0	2	1	28	10	4	4	49
Totals	8	50	6	449	89	15	29	646

Table 4

For all seven towns, the main reason for visiting was for shopping. As expected for Elgin being the main centre of employment, the next main reason for visiting was for work. Two of the six respondents for Dufftown said they worked there. Lossiemouth had the most diverse reasons for visiting compared to the other towns.

Twenty people said they visited for 'other' reasons. In order of popularity these 'other' reasons were because they live there, for opticians/dentist checkups and luncheon appointments.

11.5. Improvements

Question five asked people what aspects of the town centre they consider needs improving. As with question four, the results are summarised by pie charts with the data table in figure 4 / table 5 below.

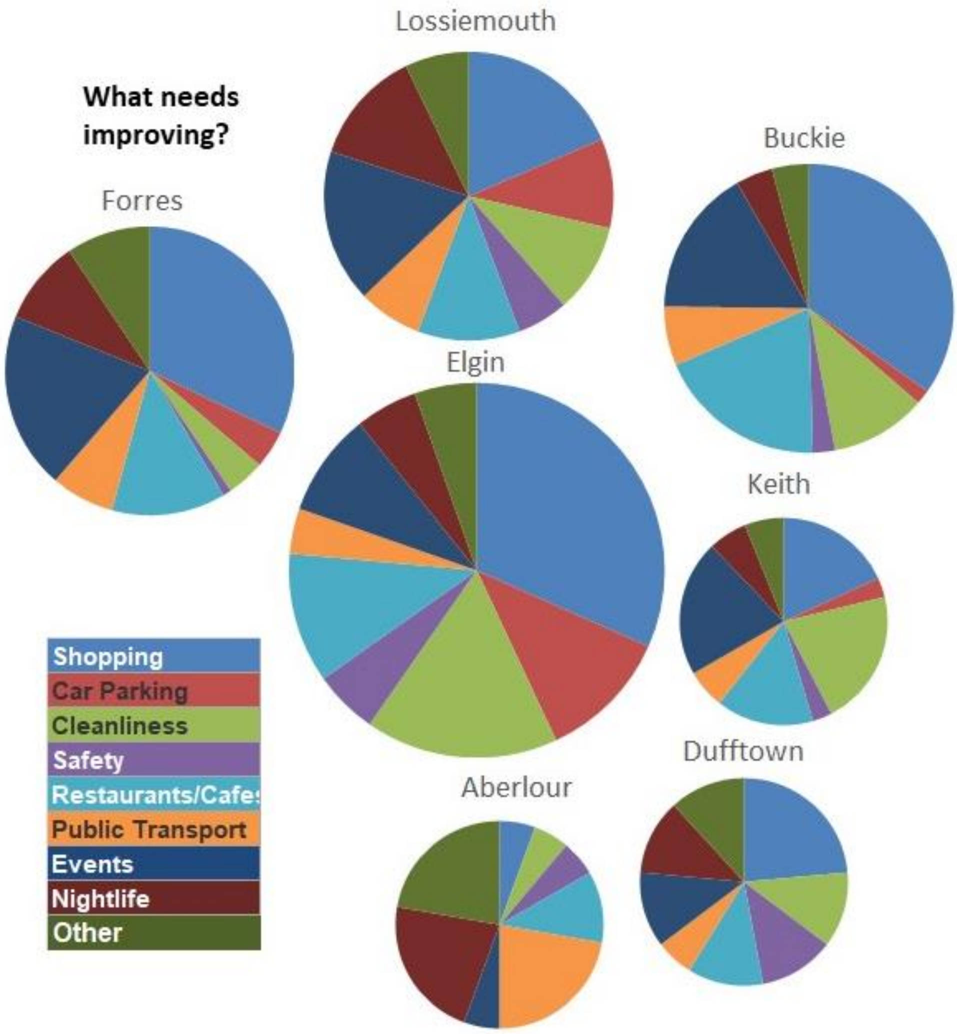


Figure 4

	Aberlour	Buckie	Dufftown	Elgin	Forres	Keith	Lossiemouth	Total
Shopping	1	42	4	372	68	6	13	506
Car Parking	0	2	0	134	9	1	7	153
Cleanliness	1	13	2	195	9	7	7	234
Safety	1	3	2	65	2	1	4	78
Restaurants/Cafes	2	23	2	132	27	5	8	199
Public Transport	4	8	1	46	15	2	5	81
Events	1	20	2	105	42	7	12	189
Nightlife	4	5	2	63	20	2	9	105
Other	4	5	2	63	20	2	9	105

Table 5

- Shopping was noted most in need of improvement in all town centres. In Lossiemouth, an equal number voted for shopping as for evening economy/events improvement.
- Cleanliness came out second as most in need of improvement everywhere, particularly in Elgin.
- Car parking (particularly in Elgin) and restaurants (in Buckie) came third as requiring improvement.
- Relatively few said public transport needed to be improved except for the six people responding about Aberlour.
- Safety is a concern for respondents about Dufftown. It appears only a consideration for other town centres.

79 people selected 'other' for improvements. Reasons given were very diverse. Elgin received 41 responses for 'other', followed by 22 for Forres, 9 for Lossiemouth. Common concerns in these three towns were:

- **Elgin**: public toilets, general appearance, and upkeep (repairs to buildings), empty retail premises, increase in low-quality 'Poundland'-type shops, charity shops, nail bars and fast-food outlets. People said more should be done to attract those high-quality chain stores which do not necessarily thrive in the out-of-town retail parks.
- **Forres**: People had a brighter view of Forres, saying it has potential and attracted comments about local volunteers not the Council making it pretty. Again, public toilets, fabric of buildings and proliferation of fast-food outlets were a concern.
- **Lossiemouth**: four of the nine respondents focussed on the town's Post Office, which has erratic opening hours.

11.6. Other Comments

The final question of the survey was open ended, inviting people to make comments or proposals. About half of the 646 respondents to the survey (325 or 51%) had comments to make. These largely repeated question 5 re-stating what they thought needed improvement, with a sprinkling of complimentary remarks, for example the work of local volunteers in flower arranging to brighten up town centre.

It was clear people wanted to talk most about Elgin; 222 of the comments (68%) and proposals concerned the town. The comments are summarised graphically in the 'word cloud' in figure 5, it is the overall picture for the seven towns as well as Elgin.

Figure 5

Some 58 of the 325 comments appertained to parking, this includes a range of issues from wanting cheaper parking, fairer parking charges (parking is free in Forres but not Elgin) and inconsiderate parking in the 'Plainstones' area and Batchen Street in Elgin.

Among their comments, 43 people asked whether anything could make commercial landlords improve the state of their buildings or do something about units which have lain empty for years. The survey offered ideas for what could occupy the vacant premises (change of use to affordable accommodation/living areas and 'pop up' shops (as in Keith)) were suggested for vacant premises.

A number of people suggested that it is not the traditional bricks-and-mortar shops that we should be focussing on since these have long emigrated to out-of-town shopping parks. Instead, focus should be on attracting farmers markets, Christmas markets, events such as civic ceremonies (reviving 'Kirking of the Council'), Parisian-style 'wild posting' areas, dedicated busking areas and developing the outdoor 'cafe culture'.

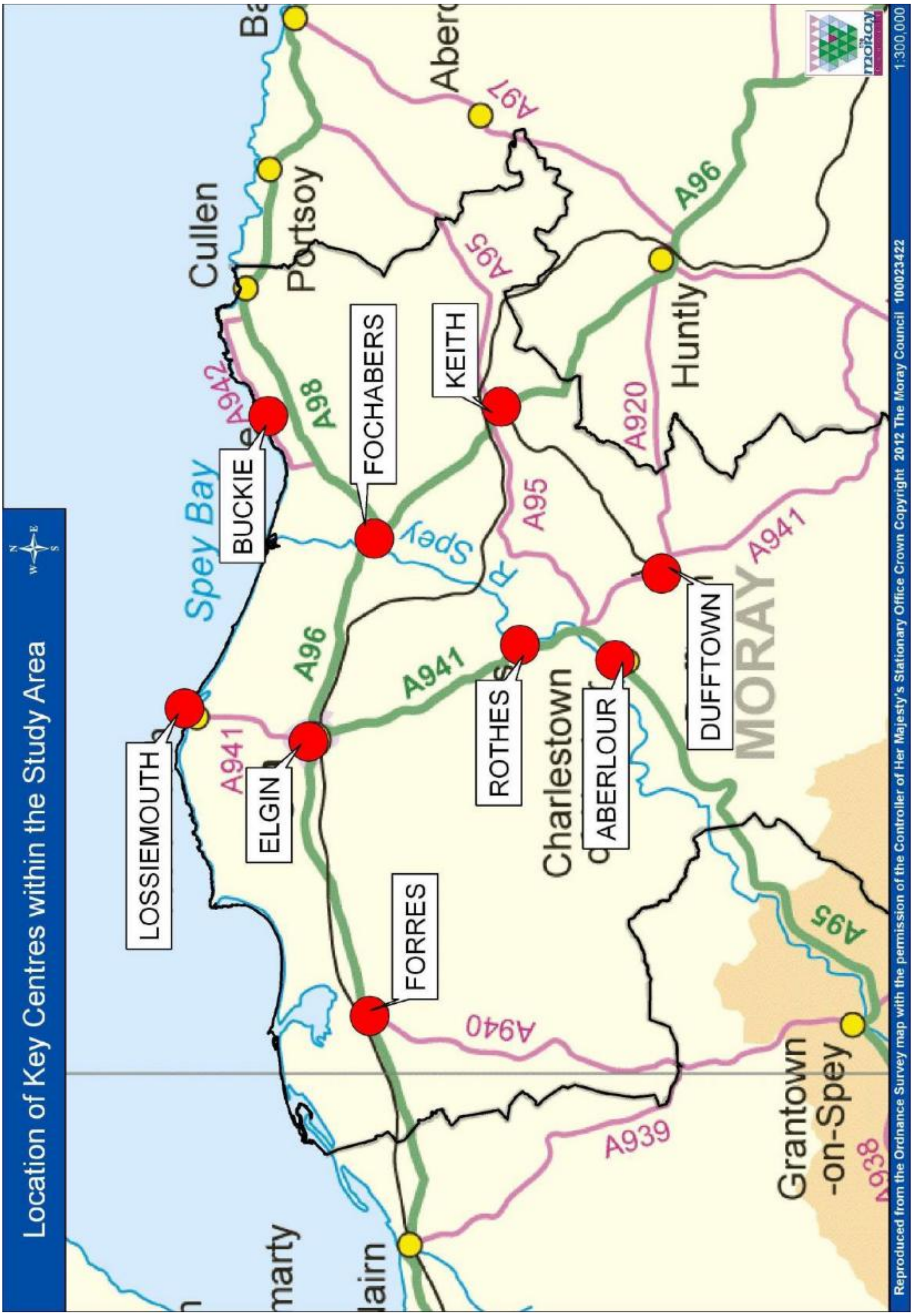
Some 42 people mentioned the quality of the shops in their comments, largely repeating their selections in question 5. They thought the proliferation of low-end shops like vape shops, fast food and charity shops should be restricted.

Some 11 people made reference to culture and arts potential in Keith, Forres and Elgin. With the architecture and history of the area they said that a Findhorn Bay-type venue would attract more visitors to the towns, and it is a shame that some parts appear to be permanently covered in scaffolding.

11.7. Town Centre Perception Survey going forward

The intention is for the Town Centre Perception Survey to be undertaken annually. This will allow comparison over time and help to assess the impact of regeneration project and activities within town centres.

Appendix I: Location of Key Centres



Appendix II=: 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