

# **Moray Town Centre Health Check Assessment 2018**

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## Executive Summary

In 2018, 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 2018 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.

Assessment was 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.

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		% of National Multiples	
	2018	2016	2018	2016	2018	2016	2018	2016	2018	2016	2018	2016	2018	2016
<b>Elgin</b>	90	86	19	18	51	47	65	65	25	36	10	14.3	34	34
<b>Edgar Road</b>	21	20	2	2	2	3	4	3	7	5	19.4	15.6	88	75
<b>Forres</b>	28	29	15	13	27	21	23	23	3	9	3	9.3	18.5	20.6
<b>Keith</b>	26	27	13	13	13	12	19	18	9	5	11.2	6.7	13.5	9.6
<b>Buckie</b>	27	28	8	7	16	15	20	21	10	8	12.3	10.3	25	28
<b>Lossiemouth</b>	10	10	6	6	12	9	21	18	5	6	9.2	15.7	7.1	8
<b>Aberlour</b>	7	7	4	5	5	4	10	9	1	0	3.7	0	6	7
<b>Dufftown</b>	7	10	7	6	4	4	19	18	2	4	5.1	9.5	11	10
<b>Fochabers</b>	9	7	4	4	2	3	9	9	1	1	4	4	13	14
<b>Rothes</b>	6	7	3	3	2	2	9	9	3	2	11	8.7	18	16.6

## 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. This report provides an assessment of existing 'town centre' uses in line with Scottish Planning Policy (SPP) criteria.

'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.

**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). Plans of the footfall survey locations are provided in Appendix II.

**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. 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.

### 3. Elgin Town Centre Health Check

Changes since 2016 have included occupation of almost all units on Batchen Street with Alluring Boutique, Sirology, The Candy Shop, Clic Nail Studio, Razor Sharp, 19 Crepes and Coffee and Sugar Plum all having opened in the two year period. The “Buzz on Batchen Street” branding was evident on the survey day. Trespass, Blackbridge Furnishers, and Auto Save have also located within the town centre. As with previous years there have been a number of hair and beauty salons opened. The previous trend for new electronic cigarette/vaping shops and independent shops offering mobile/pc repairs has tailed off but the existing units have been retained in the town centre.

Whilst overall vacancies have decreased, new vacancies were recorded within the St Giles Centre including the former Semi Chem, Hair Zone, and Proper Pasty units. This has contributed to continuing high vacancy rates within the centre. National retailer Poundworld also left the High Street prior to the company going into administration. Long established local retailer Relax and Charlies Shoes also closed, although it is noted that since the survey date Relax has been reoccupied and work has begun to refurbish Charlies Shoes.

It is encouraging that footfall has generally increased across the High Street. At the east end of the High Street footfall fell to similar levels found in 2014.

#### Pedestrian Footfall

A pedestrian flow count was undertaken by Moray Council staff on Thursday 28<sup>th</sup> June 2018. Pedestrian footfall data was collected at six positions as set out below and shown on the plans in Appendix II.

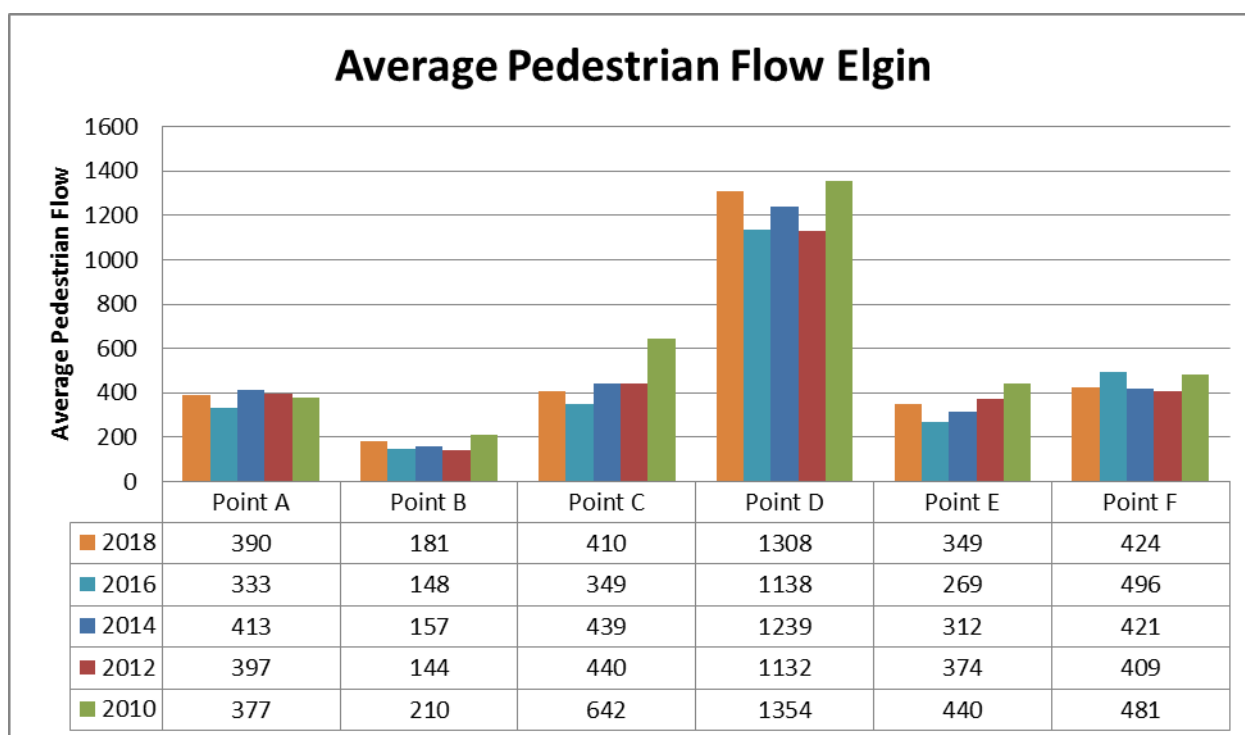
#### Details of Elgin Town Centre Footfall Survey Locations

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)

Of the six locations, the position opposite Boots in the High Street (Point D) recorded the busiest footfall. The lowest pedestrian flow count in the town centre was recorded at the western end of High Street (Point B). This is consistent with previous year’s studies.

Comparison to the footfall survey undertaken in 2016 shows increases across all point with the exception of Point F at the east end of the High Street. The biggest differences between 2016 and 2018 are at point E on South Street where a 29% increase in average footfall was seen. At point F (east end of High Street) footfall fell by around 14%. The weather on the date of the 2018 survey was very hot and sunny. It is notable that whilst the 2016 survey had similar conditions (albeit not as high temperatures) the survey in 2016 was undertaken on the day of the EU referendum.

## Elgin Average Hourly Flow 2010/2012/2014/2016/2018 comparison

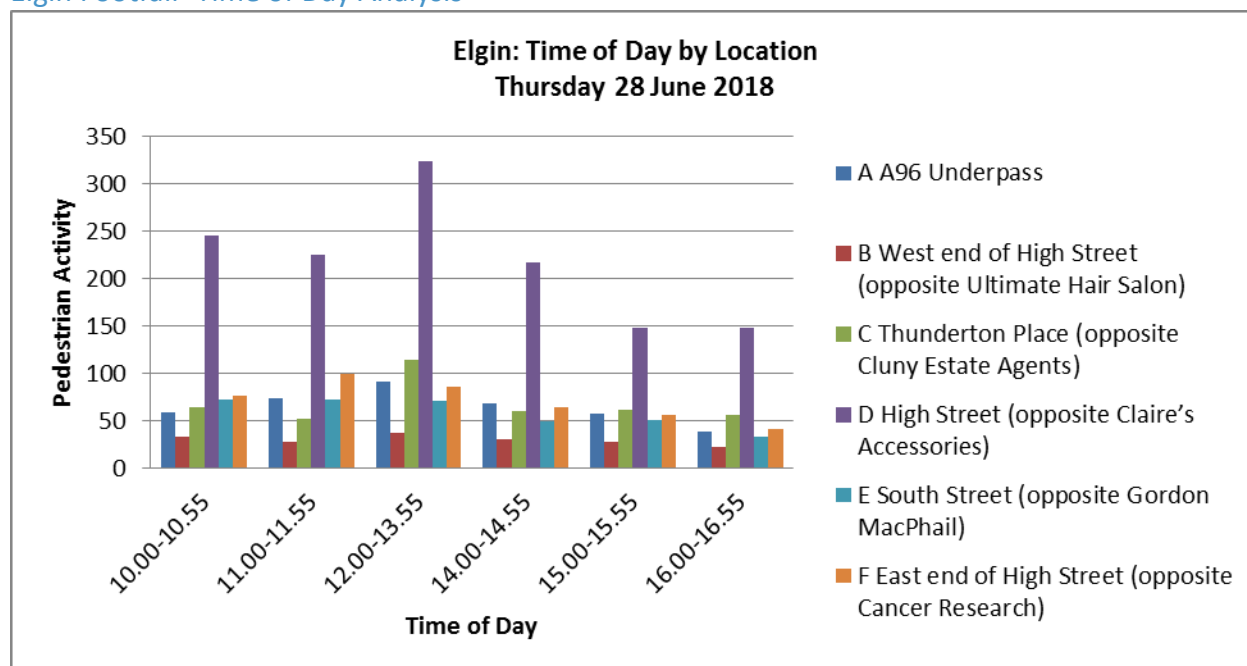


Analysis of different times of the day shows that peak footfall was between 11.00 and 14.00. This differs slightly from 2016 when the peak was only between 12.00-14.00.

## Elgin Footfall- Time of Day Analysis

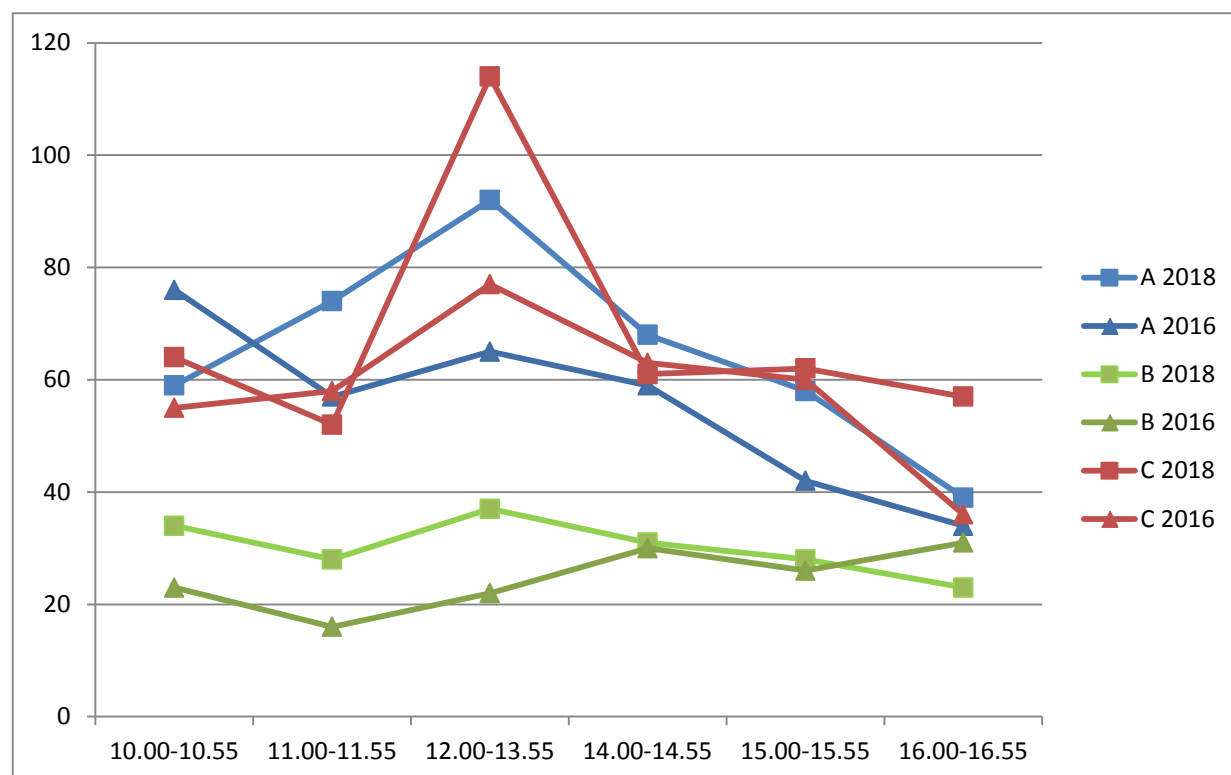
	Enumeration Point	10.00-11.00	%	11.00-12.00	%	12.00-14.00	%	14.00-15.00	%	15.00-16.00	%	16.00-17.00	%
<b>A</b>	A96 Underpass	58	14	70	17	73	18	70	17	96	23	46	11
<b>B</b>	West end of High Street	21	13	23	15	35	22	24	15.5	24	15.5	30	19
<b>C</b>	Thunderton Place	70	16	89	20	88	20	69	16	48	11	75	17
<b>D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

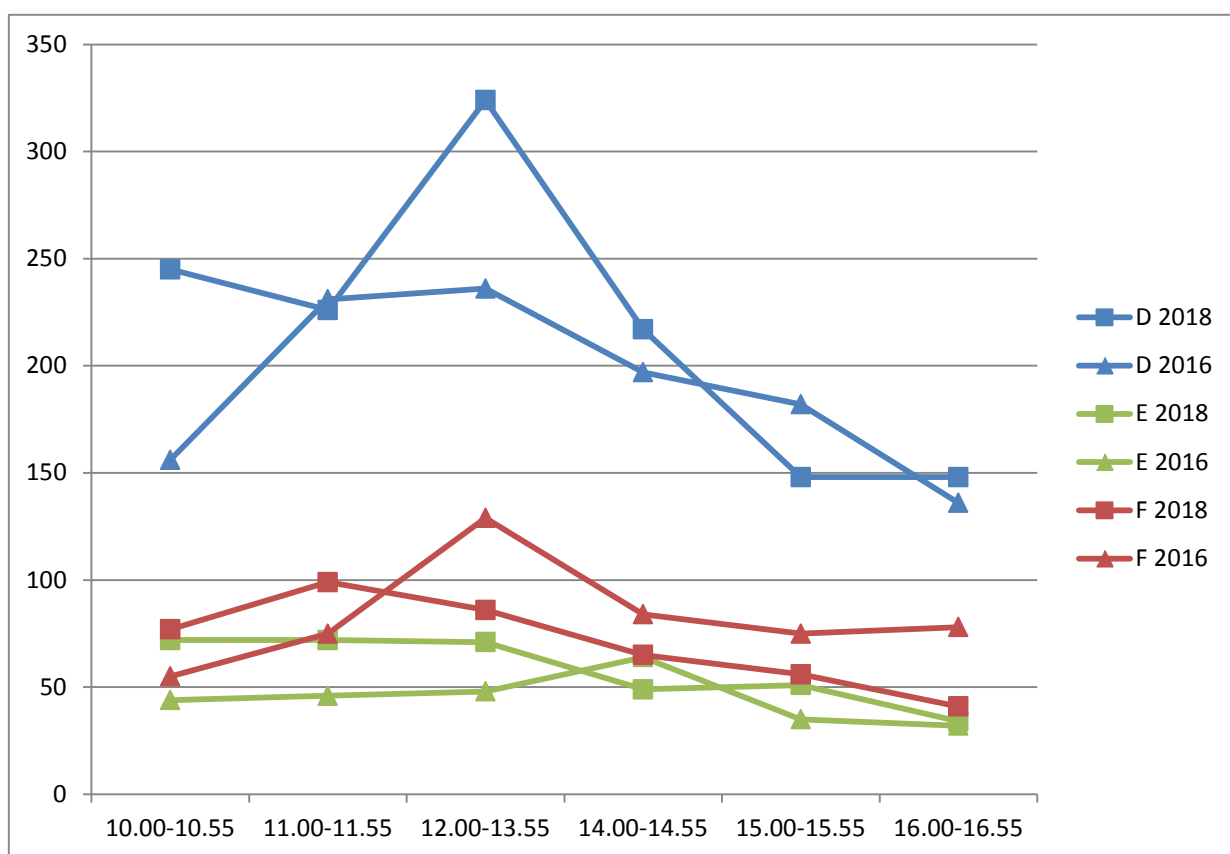
## Elgin Footfall- Time of Day Analysis



Broadly the variation in pedestrian footfall across the day has remained the same to previous years surveys.

## Elgin Pedestrian count 2016-2018 Comparison





## 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 2016 results alongside.

## Elgin- Diversity of Uses

Summary of Elgin Diversity of Uses Survey				
	2018		2016	
Type of Use	No. of Outlets	Floor space (sqm)	No. Of Outlets	Floor space (sqm)
Comparison	90	24299.9	86	23765.5
Convenience	19	15728.3	18	15682.5
Retail Service	51	4846.5	47	4598.3
Leisure Service	65	16331.6*	65	15867.6*
Financial & Business Service	38	8141.4	39	8357.4
Health & Medical	11		11	
Public Service	25		21	
Religious Service	5		5	
General Office Use	30		28	
Vacancy	25	6127.3*	36	7991*
<b>Total</b>	<b>359</b>	<b>75475</b>	<b>356</b>	<b>76262.3</b>
<b>Notes:</b>				
<b>*The Regional Assessor does not hold floor space data for Hotels and Public House premises</b>				

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 a number of national multiple retailers located within Elgin, including Marks & Spencer, WH Smiths and M&Co. Site surveys revealed 54 national (Scottish/UK) multiples in the town centre out of a total of 160 comparison, convenience, and retail service outlets – that is 34%. This is a similar level to 2016.

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. It is notable that in 2016 there were six vacant units on Batchen



Street and at the time of the survey there was only one (which is now occupied by Against the Grain).

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. This has all been classed as 'Convenience' floor space above.

7 (4.3%) units in the town centre were identified to be charity shops. This is the same level as 2016.

One of the biggest changes highlighted in the 2016 was the increase in Electronic Cigarette or "vaping" outlets and independent shops offering mobile/pc repairs and accessories. Whilst the number of units has not increased these uses have not reduced since 2016.

### Vacancy Rate

A site survey by Moray Council planning staff during June 2018, confirmed the number of vacant units stood at 25<sup>1</sup>, as illustrated above. Vacancies account for 10% of the total number of Comparison, Convenience, Retail and Leisure Service units within the centre. This is a significant decrease from 2016 when 36 units were recorded. As a rule of thumb 10% is used in Scotland to indicate the relative health of a town centre. New occupiers include Tresspass, Blackbridge Furnishers, Sirolgy, Alluring Boutique, The Candy Shop and several hair and beauty salons.

New vacancies since 2016 include national retailers such as Semi Chem, and Poundworld. In addition to the nationals a number of independent retailers have also accounted for new vacancies including Baggs, Hair Zone, Relax, Proper Pasty Co and Charlies Shoe Shop. 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. Since the survey was completed in June there has been activity in some of the vacant stores for example The Works has opened in the old Clintons on the High Street, Against the Grain opened on Batchen Street, and Imagine has opened in the old Relax unit.

Floor space data obtained from the Regional Assessor indicates that there is approximately 6127.3 sq m of vacant floor space with Elgin town centre. There is approximately 110 m of vacant retail frontage in the town centre (figure obtained by scaling off OS-base plans). This figure equates to approximately 8.5% of the retail frontage of the traditional shopping streets in the town centre- (e.g. the core retail area of High Street; Commerce Street;

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<sup>1</sup> It should be noted that vacancies are measured for vacant Comparison; Convenience; Retail Service; and Leisure Service outlets only and is based on their last use. Therefore, vacant banks or estate agents are not included.

Batchen Street; South Street and Thunderton Place). This is a decrease from 13.44% in 2016.

### Elgin Summary

Elgin town centre is an attractive centre which plays an important role in the region. Since 2016 there have been improvements across most indicators. It is notable that vacancy levels have reduced and are now similar to levels found in 2012. However, there continues to be long standing vacancies and high levels of vacancies in the St Giles Centre. Contrastingly there are improvements within the town centre, for example on Batchen Street where independent retailers have a unique offering and have created a “Buzz on Batchen Street”.

## 4. Edgar Road Health Check

Although not part of Elgin town centre, the Edgar Road area (including the Elgin Retail Park and Springfield Retail Parks) is a major commercial centre and a key focus for substantial retail activity.

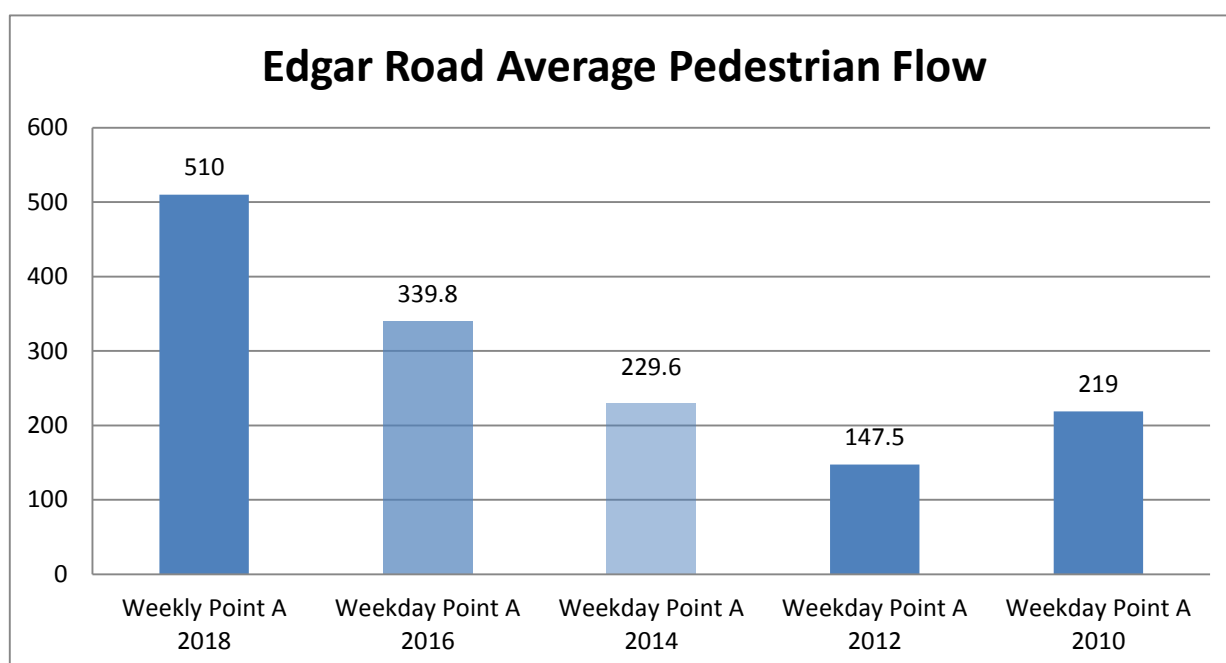
New occupiers since 2016 include JD and Tapi Carpets (formed by splitting B&M). New vacancies include Topp Tiles and the unit resulting from Edmundson Electrical moving. There continues to be four units that have never been occupied within Elgin Retail Park. Footfall at Springfield Retail Park has continued to increase, with a significant increase experienced compared to 2016.

### Pedestrian Footfall

A pedestrian flow count was undertaken by Moray Council staff on Friday 29 June 2018 at the Springfield Retail Park. Pedestrians, who crossed a point between NEXT and Costa Coffee, were counted between 11.15 to 14.30. 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.

An overview of the average hourly flows is summarised below with comparison to previous results. This shows that the average hourly flows have increased substantially, an increase of around 170 was found in 2018 compared to 2016. This is the biggest increase since data was collected.

## Edgar Road – Average Hourly Flow



## 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 the Asda and Allarburn Dairy therefore these make up a significant proportion of the area's floor space.

### Edgar Road Diversity of Uses

Summary of Edgar Road Diversity of Uses Survey				
	2018		2016	
Type of Use	No. of Outlets	Floor space (sqm)	No. Of Outlets	Floor space (sqm)
Comparison	21	21171.76	20	21382.15
Convenience	2	12386.8	2	12386.8
Retail Service	2	547.2	3	547.2
Leisure Service	4	1182.06	3	972.86
Financial & Business Service	3	1232.5	3	1232.5
Health & Medical	1		1	
Public Service	1		1	

<b>Religious Service</b>	0		1	
<b>General Office Use</b>	0		0	
<b>Vacancy</b>	7	4247.44	5	3260.35
<b>Total</b>	<b>41</b>	<b>40767.76</b>	<b>39</b>	<b>39781.86</b>

### Retailer Representation

There are 22 national (Scottish/UK) multiples in the Edgar Road Area out of a total of 25 retail goods shops– that is 88%. This figure can be contrasted to Elgin town centre, where 34% of the retail goods shops are currently multiples.

### Vacancy Rates

The number of vacant units identified by Moray Council planning staff was seven, which is a vacancy rate of 19.4%. This is an increase from 16% in 2016. Floor space data obtained from previous planning application documents indicates that there is approximately 4247.44 sqm of vacant floor space in the Edgar Road area.

### Edgar Road Summary

The Edgar Road area of Elgin provides a significant concentration of trading retail floor space. It is notable that the area has 21 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 seven, which is a vacancy rate of 19.4%.

## 5. Forres Town Centre Health Check

The biggest change across the High Street has been an increase in Retail Services with new occupiers such as Ibiza Sun, Relax Spa and Beauty, a picture framer, and tattoo studio. Other new occupiers have included the Bike Bothy, Village Greenery Florists and Deveron Vapes. Vacancies have decreased to three units, of these only 89 High Street (formerly Images) is a new vacancy. Whilst the reduction in vacancies is encouraging there are many non-retail units, including the old Royal Bank of Scotland and other offices, that are vacant. The condition of some of the longer term vacant units has a negative impact on the perceptions of the town's health.

### Pedestrian Footfall

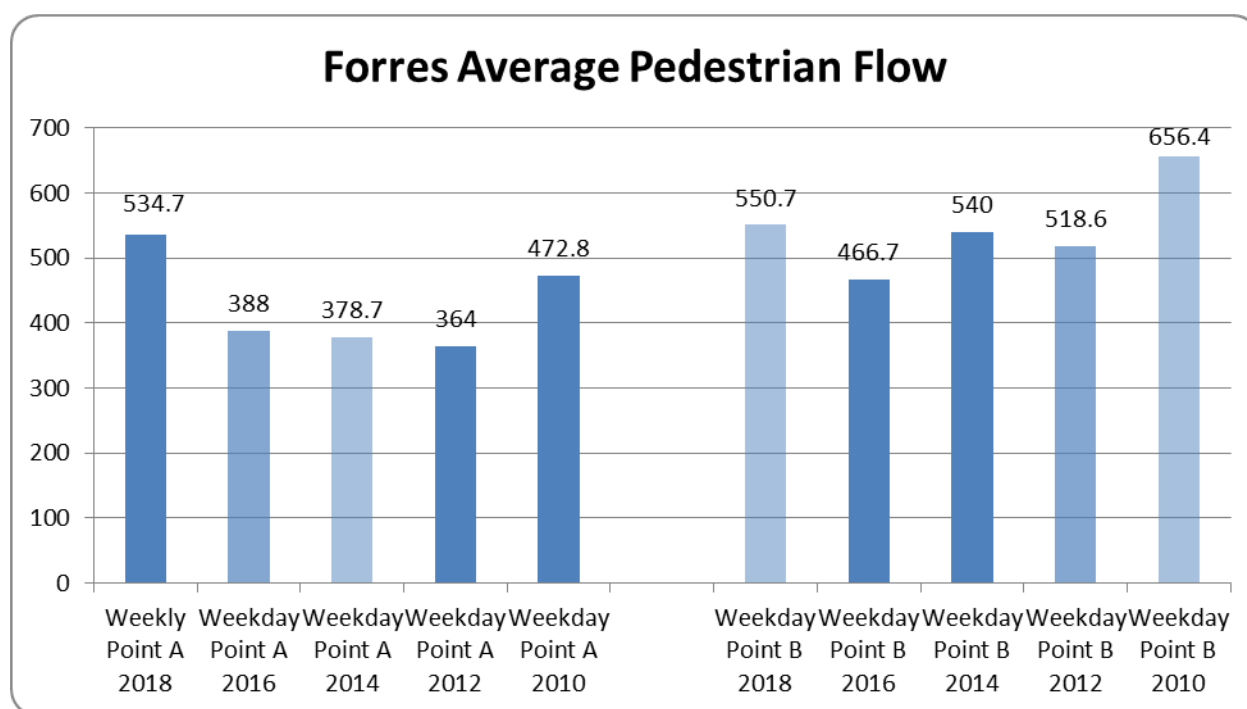
A pedestrian flow count was undertaken by Moray Council staff on Friday 29<sup>th</sup> June (between 14.00 and 17.00). Pedestrian footfall data was collected at two positions in the town centre. Details of the survey locations are provided below with a plan provided in Appendix II.

### Details of Forres Footfall Survey

Enumeration Point	Location
<b>A</b>	No. 42 High Street- (Savers)
<b>B</b>	No. 90 High Street- (Boots Chemist)

The two locations had very similar footfall, with point B at Boots recording a slightly higher flow. Footfall increased in comparison to 2016.

### Forres Average Hourly Pedestrian Flow



Analysis revealed that overall 48% of the total flow peaked between 14.00 and 15.00. It is noted this coincides with school pick up. Further details of the weekday Time of Day Analysis is illustrated below.

### Forres- Time of Day Analysis- Friday 29 June 2018

	Enumeration Point	14.00-15.00	%	15.00-16.00	%	16.00-17.00	%
<b>A</b>	No. 42 High Street- (Superdrug)	206	51.4%	101	25.2%	94	23.4%
<b>B</b>	No. 90 High Street- (Boots Chemist)	186	45.0%	120	29.1%	107	25.9%
	<b>Total</b>	392	48.2%	221	27.1%	201	24.7%

## 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 Financial and Business 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				
	2018		2016	
Type of Use	No. of Outlets	Floor space (sqm)	No. Of Outlets	Floor space (sqm)
Comparison	28	4659.6	29	4714.8
Convenience	15	2369.9	13	2268.9
Retail Service	27	2225	21	2489.6
Leisure Service	23*	1292.3	23*	1292.3
Financial & Business Service	14	4103.7	20	4491.1
Health & Medical	5		4	
Public Service	14		12	
Religious Service	3		3	
General Office Use	6		8	
Vacancy	3	305.4	9	834.7
<b>Total</b>	<b>138</b>	<b>14955.9</b>	<b>142</b>	<b>16091.4</b>
Notes:				
*The Regional Assessor does not hold floor space data for Hotels and Public House premises				

## Retailer Representation

There are 13 national (Scottish/UK) multiples in the town centre out of a total of 70 retail goods/services shops— that is 18.5%. Four (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

The number of vacant units identified was three, which is a vacancy rate of 3%, this is below the 10% rule of thumb which is generally used in Scotland to indicate the relative health of a town centre. Vacancies in Forres have decreased from nine vacant units (9.3%) recorded in 2016. However, within the town centre there are many other non-retail buildings that are vacant and their appearance impacts on the perception of the health of the town centre.

Floor space data obtained from the Regional Assessor indicates that there is approximately 305sqm of vacant floor space in Forres town centre. There is approximately 34.95 m of vacant retail frontage in the town centre (figure obtained by scaling off OS-base plans). This figure equates to approximately 4.7% 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 small decrease from the 5% found in 2016.

## Forres Summary

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.

## 6. Keith Town Centre Health Check

In 2016 Keith had shown improved signs of vitality and viability however the 2018 survey showed vacancy levels similar to 2012 and lower footfall on Mid Street. New vacancies have included long established local furniture retail Third Brothers. On the day of the survey the "Pop Up Shop" was not occupied. Be So Crafty, The Cozy Neuk and Happy Cones have also closed resulting in new vacancies. There are some new occupiers particularly on the leisure and retail service side. These include Room to Relax, The Beauty Retreat, the Boat n Barn, Square Roots, Crafty Chaos, and One Day Like This. Footfall has continued to fall on Mid Street but small increases continue to be seen at the Tesco access.

## Pedestrian Footfall

A pedestrian flow count was undertaken by Moray Council staff on Friday 29th June 2018 (between 14.00 and 17.00). Pedestrian footfall data was collected at two positions. Details of the survey locations are provided below with a plan provided in Appendix II.

### Details of Keith Footfall Survey

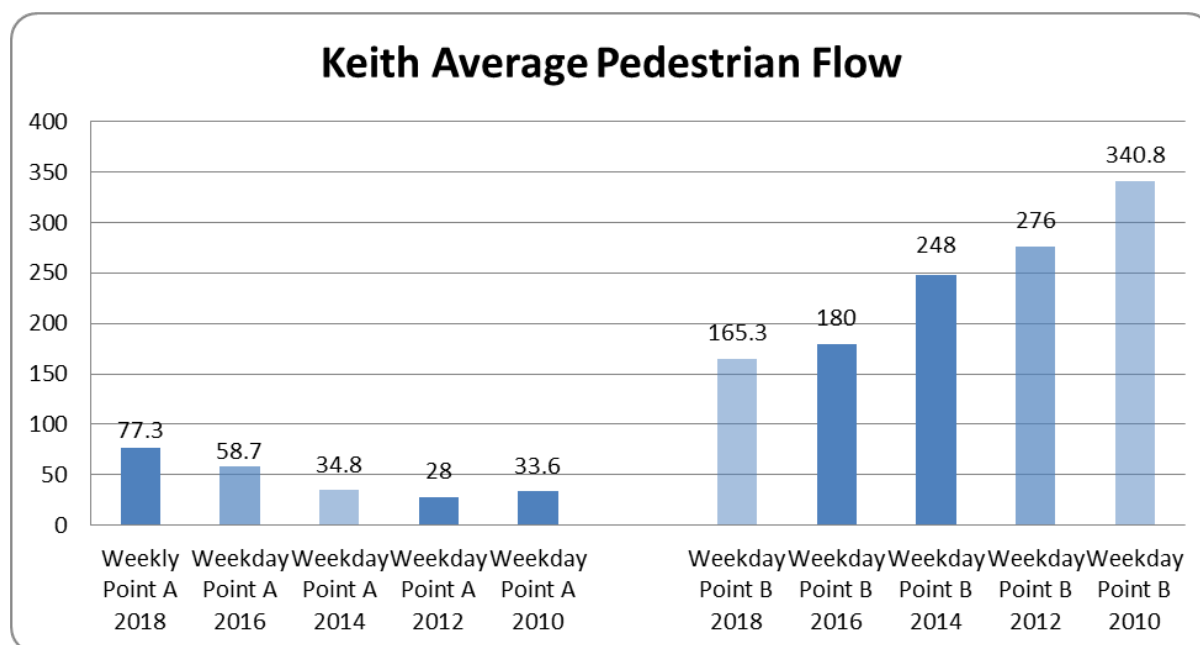
Enumeration Point	Location
A	No. 140 Moss Street- (Pedestrian Crossing on A96 to access TESCO)
B	No.130-132 Mid Street- (Post Office)

Of the two locations, point B recorded the busiest footfall although the figure is down 8% compared to 2016. It is noted that the weather was very hot which could have affected pedestrian activity.

The lowest pedestrian flow count was recorded at Point A at the pedestrian crossing on the A96 to access Tesco. Although low pedestrian activity was recorded at Point A, the average flow was higher than 2016.

Overviews of the average hourly flows with the comparable figures from previous year's surveys are recorded below.

### Keith Average Hourly Pedestrian Flow



Analysis of the count revealed that overall, pedestrian flow was highest between 15.00 and 16.00 when 54% of the overall footfall occurred. This coincides with pupils leaving the primary and secondary school. Further details of the weekday Time of Day Analysis is illustrated below.



### Keith- Time of Day Analysis- Friday 29 June 2018

	Enumeration Point	14.00-15.00	%	15.00-16.00	%	16.00-17.00	%
<b>A</b>	No. 140 Moss Street (Pedestrian Crossing on A96 to access TESCO)	20	34.5%	27	46.5%	11	19.0%
<b>B</b>	No. 130-132 Mid Street- (Post Office)	27	21.8%	71	57.2%	26	21.0%
	<b>Total</b>	<b>47</b>	<b>25.8%</b>	<b>98</b>	<b>53.8%</b>	<b>50</b>	<b>20.4%</b>

### 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.

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

### Keith Diversity Uses

Summary of Keith Diversity of Uses Survey				
	2018		2016	
Type of Use	No. of Outlets	Floor space (sqm)	No. Of Outlets	Floor space (sqm)
Comparison	26	4497.9	27	5488.3
Convenience	13	1422.7*	13	1422.7
Retail Service	13	1026.1	12	960
Leisure Service	19*	910.9	18*	997.7
Financial & Business Service	11	1191.2	12	1391.8
Health & Medical	1		1	
Public Service	1		1	
Religious Service	1		1	
General Office Use	5		5	
Vacancy	9	1688.6	5*	641.9
<b>Total</b>	<b>99</b>	<b>10737.4</b>	<b>95</b>	<b>10902.4</b>

**Notes:**

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

### Retailer Representation

There are seven national (Scottish/UK) multiples in the town centre out of a total of 52 retail goods/services shops– that is 13.5%. Keith has a strong independent sector with the majority of shops being local stores with a distinct identity. Two units (4%) within the town centre were identified to be charity shops.

### Vacancy Rate

The number of vacant units identified was nine, which is a vacancy rate of 11.25% - this is higher than the 10% average used in Scotland to indicate the relative health of a town centre. This is an increase of four units from 2016 when five (6.67%) units were vacant. New vacancies include Third Brothers, Be So Crafty, the Cosy Neuk and Happy Cones.

Floor space data obtained from the Regional Assessor indicates that there is approximately 1688.6sqm of vacant floor space in Keith. There is approximately 96m of vacant retail frontage in the town centre (figure obtained by scaling off OS-base plans). This figure equates to approximately 9.9% of the retail frontage on the traditional shopping street in Keith, which is Mid Street. This is an increase from the 4.6% reported in 2016.

### Keith Summary

There is a reasonable range of convenience good shopping and comparison good shops and a good range of retail services available for a town of this size. Deterioration can be seen when comparing the survey results to 2016. The number of vacant units identified has increased from five in 2016 to nine in 2018. 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. In overall terms, there has been a deterioration on some of the key indicators since 2016.

## 7. Buckie Town Centre Health Check

In Buckie there have been several changes across the town centre, including closure of long established local retailer Cruickshanks. This large unit has meant a large increase in vacant floor space. Other closures resulting in vacancies include Trading Post, Yvonne's Drapery and Crossroads Tearoom. Blythswood has also moved resulting in a vacant unit on West Church Street. Bank closures have also impacted on the town centre. New occupiers have tended to be within the retail services with a new barber and tattoo shop opening. A phone repair/electronic cigarette shop has also opened.

## Pedestrian Footfall

A pedestrian flow count was undertaken by Moray Council staff on Friday 29 June (between 10.00 and 13.00). Details of the survey locations are provided below and with a plan provided in Appendix II.

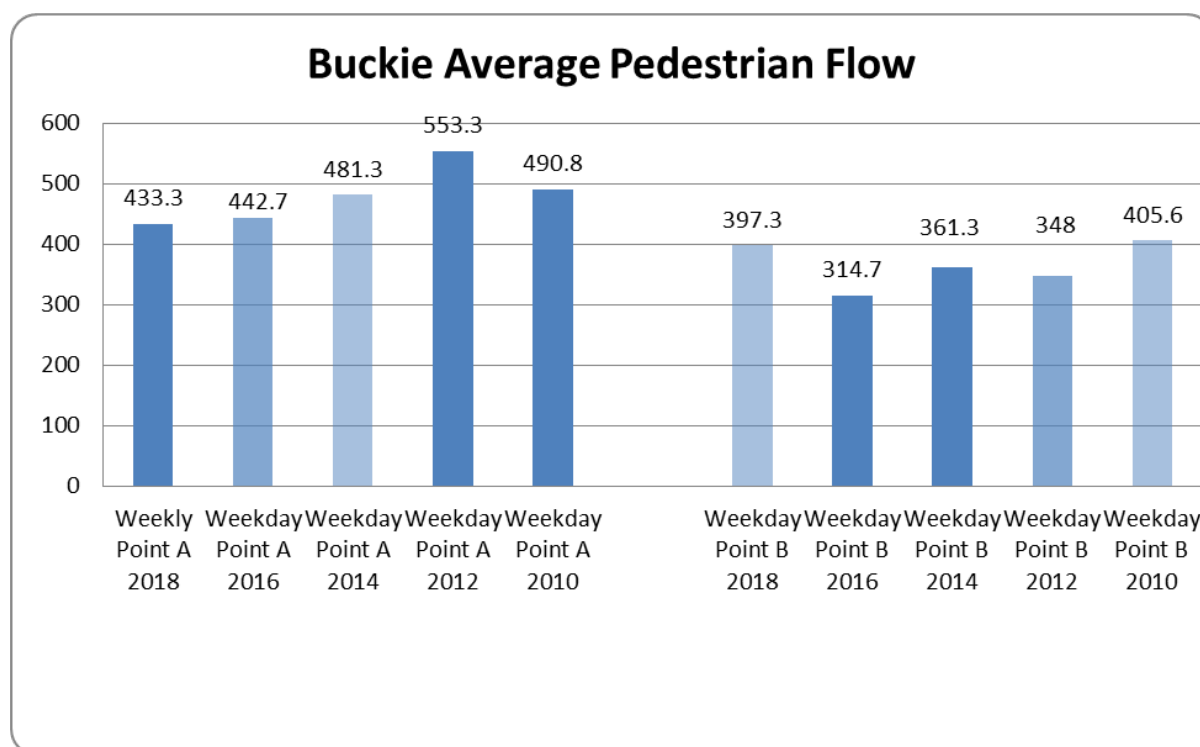
### Details of the Buckie Footfall Survey

Enumeration Point	Location
<b>A</b>	No. 3 High Street
<b>B</b>	No.3-5 East Church Street-

Of the two locations, the position at point A recorded the busiest footfall. This was similar albeit slightly lower to levels in the 2016 survey. At point B the footfall was 26% higher when compared to 2016.

An overview of the average hourly flows together with previous year's survey results are summarised below.

### Buckie Average Hourly Pedestrian Flow



Analysis of the count revealed that overall, pedestrian flow dipped between 10.00 and 11:00 to 24.6% but was relatively consistent throughout the morning. Further details of the day and Time of Day Analysis below.

### Buckie- Time of Day Analysis- Friday 29 June 2018

	Enumeration Point	10.00-11.00	%	11.00-12.00	%	12.00-13.00	%
<b>A</b>	No. 3 High Street- (Asher's Bakery)	77	23.7%	129	39.7%	119	36.6%
<b>B</b>	No.3-5 East Church Street-	76	25.5%	111	37.2%	111	37.2%
	<b>Total</b>	153	<b>24.6%</b>	240	<b>38.5%</b>	230	<b>36.9%</b>

### 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				
	2018		2016	
Type of Use	No. of Outlets	Floor space (sqm)	No. Of Outlets	Floor space (sqm)
Comparison	27	4963.5*	28	5669*
Convenience	8	2267.8**	7	2187.2**
Retail Service	16	1533.5	15	1498.1
Leisure Service	20	2235.7***	21	2294.1***
Financial & Business Service	10	1603.2	13	2398.5
Health & Medical	5		5	
Public Service	5		5	
Religious Service	4		4	
General Office Use	2		2	
Vacancy	10	1798.8	8	610.9
<b>Total</b>	<b>107</b>	<b>14402.5</b>	<b>108</b>	<b>14657.8</b>
<b>Notes:</b>				
*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.**

### Retail Representation

There are 13 national (Scottish/UK) multiples in the town centre out of a total of 51 retail goods/services shops– that is 25%. Three units (6%) were identified to be charity shops.

### Vacancy Rate

The number of vacant units identified was 10, which is a vacancy rate of 12.35%. This is higher than 2016 when a rate of 10.13% was found and is above the 10% commonly used in Scotland to indicate the relative health of a town centre.

Floor space data obtained from the Regional Assessor indicates that there is approximately 1798.8sqm of vacant floor space in Buckie town centre. This is approximately 14% of the Comparison, Convenience, Retail Service and Leisure Service floor space. There has been an increase in the vacant floor space. This is due to the closure of 'Cruickshanks' which operated over two floors. There is approximately 89.37m of vacant retail frontage in the town centre (figure obtained by scaling off OS-base plans). This figure equates to approximately 9.2% 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 5.7% reported in 2016.

### Buckie Summary

There is a reasonable range of convenience goods shopping and comparison goods shops and a good range of retail services available for a town of this size. The number of vacant units identified was 10, which is a vacancy rate of 12.35%. and an increase when compared to 2016. An increase in footfall was recorded when compared to 2016. In overall terms, Buckie shows comparatively weak signs of vitality and viability compared to 2016 and other Moray towns.

## 8. Lossiemouth Town Centre Health Check

Whilst footfall was very low in comparison to previous years, there has been a drop in shop vacancies. New occupiers include Sea Scents, Salon Red, Mario's Takeaway, Barbers, My and Your Hairdressers. This suggests continued confidence in the location for investment. Two new units became vacant with the Charity Shop and Marie Louise hairdresser closing.

### Pedestrian Footfall

A pedestrian flow count was undertaken by Moray Council staff on Friday 29<sup>th</sup> June 2018 (between 10.00 and 13.00). Pedestrian footfall data was collected at two positions. Details of the survey locations are provided below with a plan at appendix II.

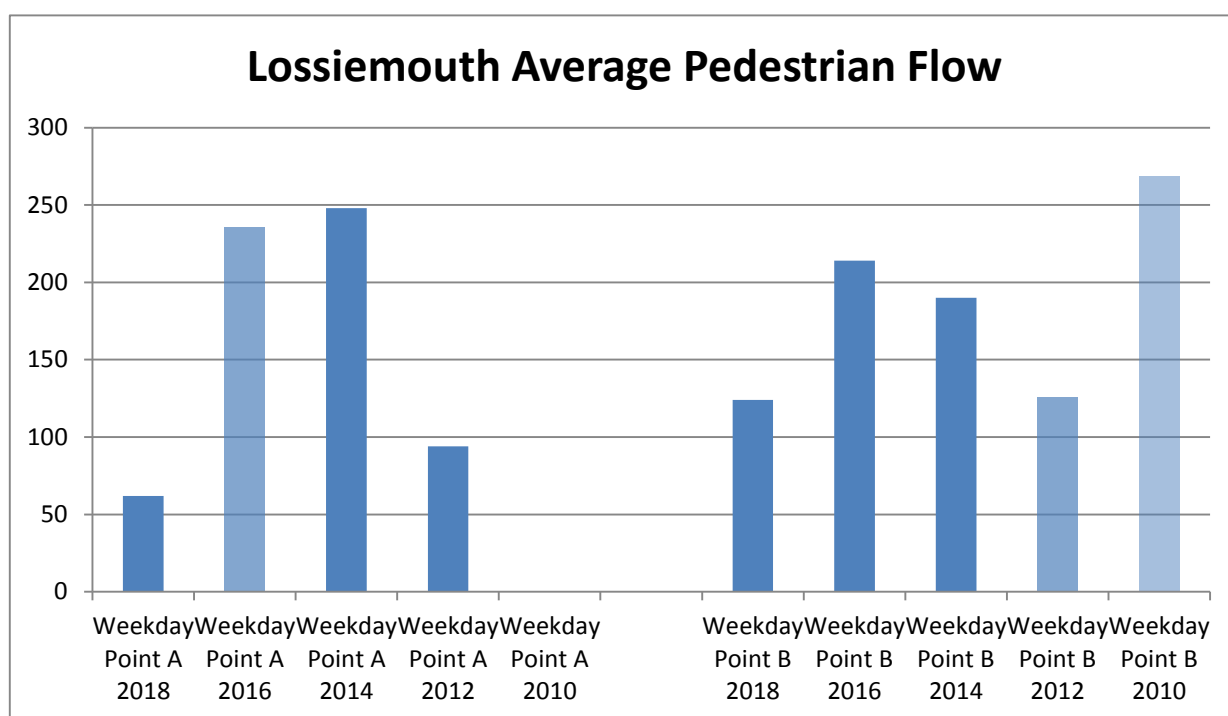
### Details of Lossiemouth Footfall Survey

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

Of the two locations, point B recorded the busiest footfall. It is notable that the weather conditions were reasonably favourable on the count day, being dry and hot. Generally footfall was significantly lower than the previous years. A significant decrease was noted at point A where footfall was just under four times lower than 2016. However, the footfall figures show some similarity to the 2012 survey.

An overview of the average hourly flows for 2018 together with previous survey results is shown below.

### Lossiemouth Average Hourly Pedestrian Flow



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

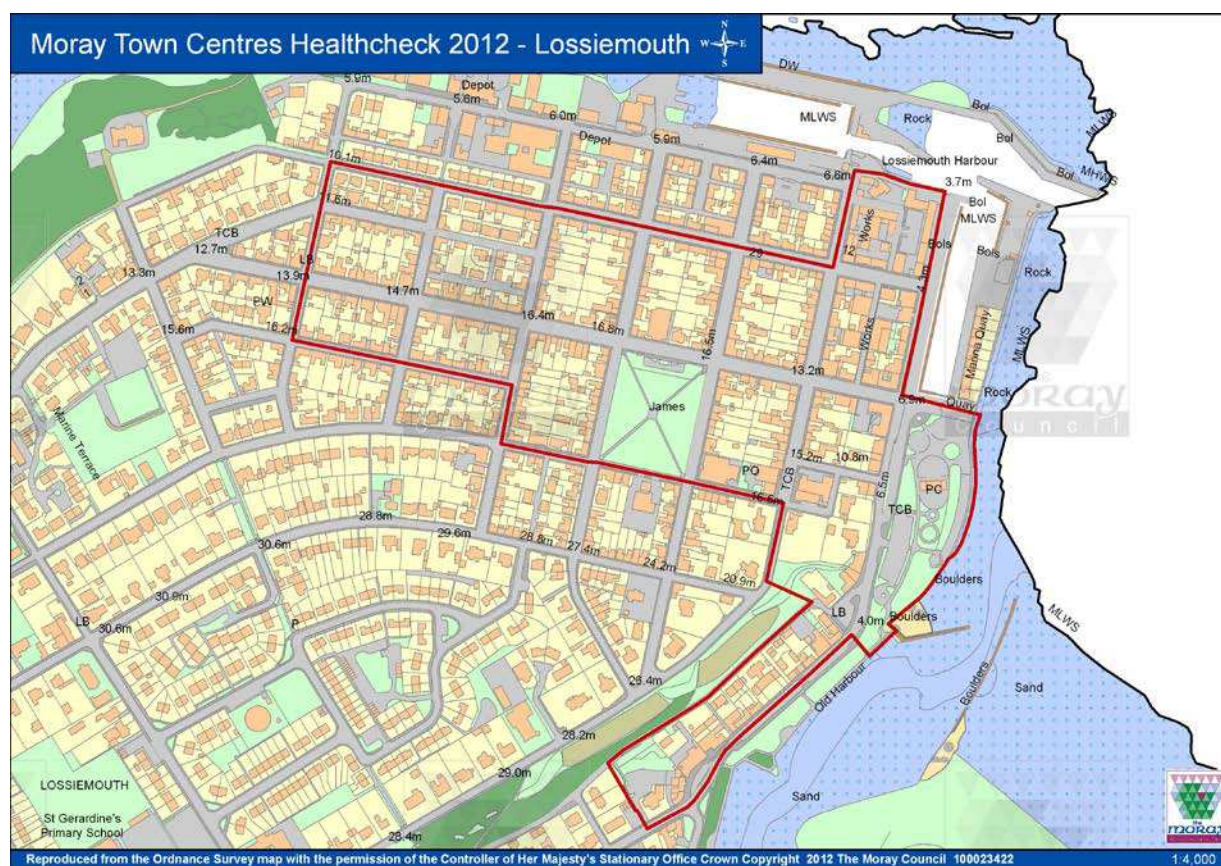
Analysis of the Friday count revealed that overall, pedestrian flow was lowest during the 12.00 to 13.00 period. Further details of the weekday Time of Day Analysis is illustrated below.

## Lossiemouth Footfall- Time of Day Analysis Friday 29<sup>th</sup> June 2018

	Enumeration Point	10.00-11.00	%	11.00-12.00	%	12.00-13.00	%
A	No. 78 Queen Street (Co-op)	9	29.0%	16	51.6%	6	19.4%
B	No. 15 Clifton Road- (Rizza's Ices)	11	17.7%	28	45.2%	23	37.1%
	<b>Total</b>	<b>20</b>	<b>21.5%</b>	<b>44</b>	<b>47.3%</b>	<b>29</b>	<b>31.2%</b>

## Diversity of Uses

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*).



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				
	2018		2016	
Type of Use	No. of Outlets	Floor space (sqm)	No. Of Outlets	Floor space (sqm)
Comparison	10	2164.7	10	2637
Convenience	6	576	6	576
Retail Service	12	933.1**	9	427.3**
Leisure Service	21	1639*	18	1995.3*
Financial & Business Service	4	816.5	5	931.11
Health & Medical	2		1	
Public Service	5		3	
Religious Service	2		1	
General Office Use	1		1	
Vacancy	5	225.8*	6	540.6***
Total	68	6908.4	65	7089.5
Notes:				
* The Regional Assessor does not hold floor space data for Hotels and Public House premises.				
**No data for units within 4 Pitgaveny Street				

## Retailer Representation

There are two national (Scottish/UK) multiples in the town out of a total of 28 retail goods/service shops – that is 7.1%.

## Vacancy Rate

The number of vacant units identified by Moray Council planning staff was three, which is a vacancy rate of 9.2%. This is a decrease of one unit since the 2016 health check. This is below the 10% rule of thumb used in Scotland to indicate the relative health of a town centre.

Floor space data obtained from the Regional Assessor indicates that there is approximately 225.8sqm of vacant floor space in the Lossiemouth study area.



## Lossiemouth Summary

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. The number of vacant units identified was five.

## 9. 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 2016 results. It is notable that Dufftown has 19 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 McColl's and Costcutter.

It is notable that banks in Aberlour and Fochabers have now closed. These are not counted within the vacancies as the last previous use was Financial and Business.

### Aberlour Diversity of Uses

Summary of Aberlour Diversity of Uses Survey				
	2018		2016	
Type of Use	No. of Outlets	Floor space (sqm)	No. Of Outlets	Floor space (sqm)
Comparison	7	613	7	510.9
Convenience	4	666.7	5	806.3
Retail Service	5	1665.2	4	1661.6
Leisure Service	10*	572.9	9	572.9*
Financial & Business Service	2	191.1	2	233.4

Health & Medical	2		2	
Public Service	4		3	
Religious Service	1		1	
General Office Use	0		1	
Vacancy	1	70.1	0	0
<b>Total</b>	<b>36</b>	<b>3779</b>	<b>34</b>	<b>3785.1</b>
<b>Notes:</b> * No floor space data for 7 Broomfield Square. Also the Regional Assessor does not hold floor space data for Hotels and Public House premises.				

### Dufftown Diversity of Uses

Summary of Dufftown Diversity of Uses Survey				
	2018		2016	
Type of Use	No. of Outlets	Floor space (sqm)	No. Of Outlets	Floor space (sqm)
Comparison	7	291.8	10	356.8
Convenience	7	825.7	6	825.8
Retail Service	4	599.2	4	82.3
Leisure Service	19	1403.5*	18	1294.3*
Financial & Business Service	4	881.5	2	1328.2
Health & Medical	0		0	
Public Service	3		3	
Religious Service	0		0	
General Office Use	0		0	
Vacancy	2	93.8	4	0
<b>Total</b>	<b>46</b>	<b>4095.5</b>	<b>47</b>	<b>4196.2</b>
<b>Notes:</b>				
* The Regional Assessor does not hold floor space data for Hotels and Public House premises.				

## Fochabers Diversity of Uses

Summary of Fochabers Diversity of Uses Survey				
	2018		2016	
Type of Use	No. of Outlets	Floor space (sqm)	No. Of Outlets	Floor space (sqm)
Comparison	9	810.5	7	693
Convenience	4	287.5	4	631.1
Retail Service	2	78.5	3	125.7
Leisure Service	9	439.5*	9	439.5*
Financial & Business Service	1	197.8	2	312.2
Health & Medical	2		2	
Public Service	2		2	
Religious Service	1		1	
General Office Use	2		2	
Vacancy	1	343.6	1	70.3
<b>Total</b>	<b>33</b>	<b>2157.4</b>	<b>33</b>	<b>2271.8</b>
Notes:				
* The Regional Assessor does not hold floor space data for Hotels and Public House premises.				

## Rothies Diversity of Uses

Summary of Rothies Diversity of Uses Survey				
	2018		2016	
Type of Use	No. of Outlets	Floor space (sqm)	No. Of Outlets	Floor space (sqm)
Comparison	6	276	7	811.9
Convenience	3	474.9	3	474.9
Retail Service	2	362.5	2	362.5
Leisure Service	9	153	9	153
Financial & Business Service	4	838.1	4	203.6

<b>Health &amp; Medical</b>	1		1	
<b>Public Service</b>	6		4	
<b>Religious Service</b>	1		1	
<b>General Office Use</b>	0		0	
<b>Vacancy</b>	3	275.6	2	234.5
<b>Total</b>	35	2380.1	33	2240.4

### 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

<b>Town</b>	<b>Aberlour</b>	<b>Dufftown</b>	<b>Fochabers</b>	<b>Rothies</b>
<b>Total Retail Goods Shops*</b>	16	18	15	11
<b>No. of National Multiples</b>	1 (6%)	2 (11%)	2 (13%)	2 (18%)

### Vacancy Rate

The overall number and percentage of vacant outlets identified in the centres of Aberlour, Dufftown, Fochabers and Rothies are set out below. The only settlement with a vacancy higher than the 10% rule of thumb used in Scotland to indicate the relative health of a town centre is Rothies. It is noted that the vacant unit (former Butchers) in Aberlour now has consent for change of use to a house.

#### Smaller Settlements- Vacancy Rates

<b>Town Centre</b>	<b>Total no. of Shops*</b>	<b>No. of Vacant Retail Outlets**</b>	<b>% of Vacant Outlets</b>	<b>Vacant Floor space (sqm)</b>
<b>Aberlour</b>	27	1	3.7%	70.1
<b>Dufftown</b>	39	2	5.1%	93.8
<b>Fochabers</b>	25	1	4%	343.6
<b>Rothies</b>	27	3	11.1%	275.6

**Notes:**

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

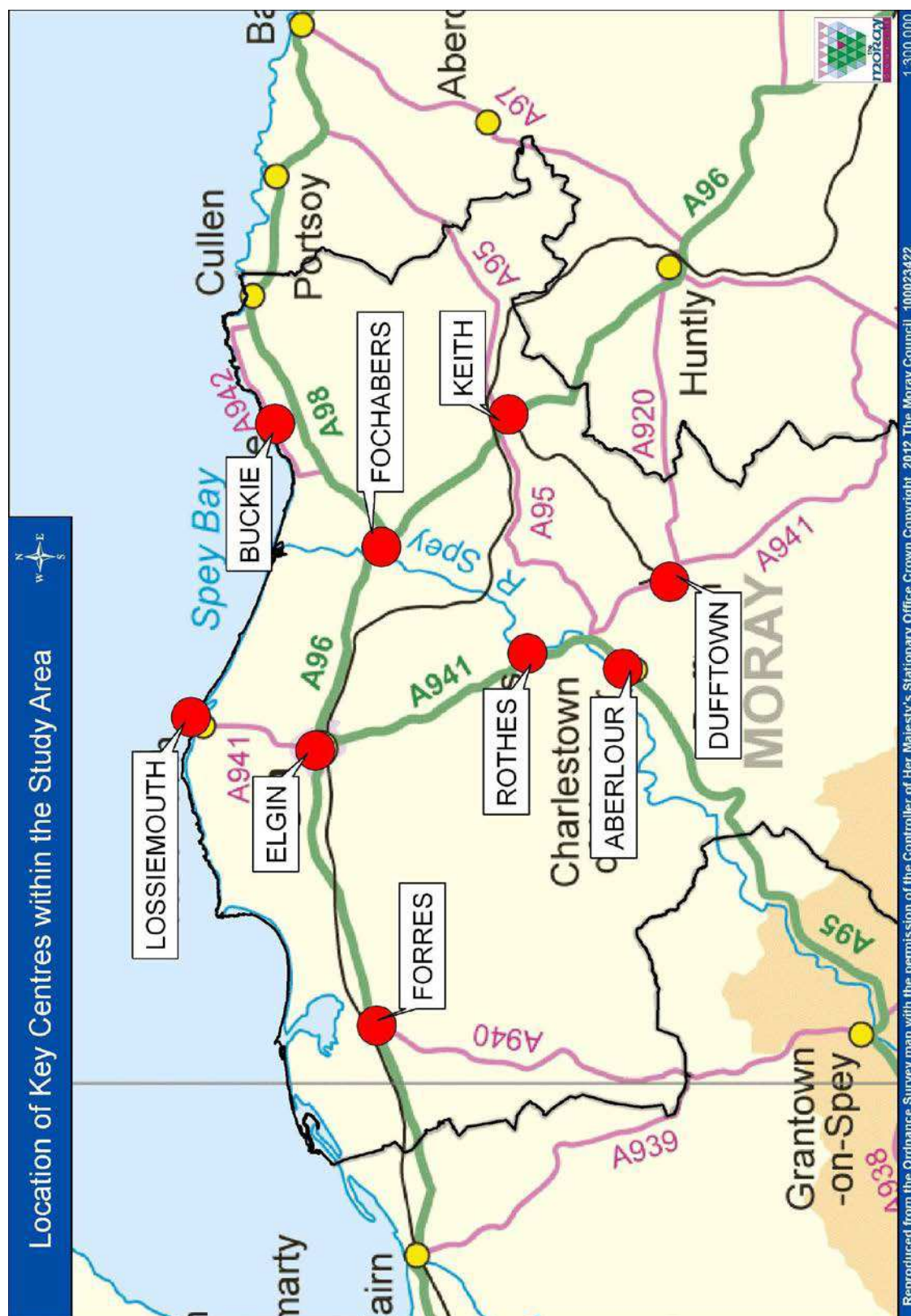
**\*\* Vacant Retail Outlets:** Vacancies are measured for vacant Comparison; Convenience; Retail Service; and Leisure Service outlets only

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

### **Smaller Settlements Summary**

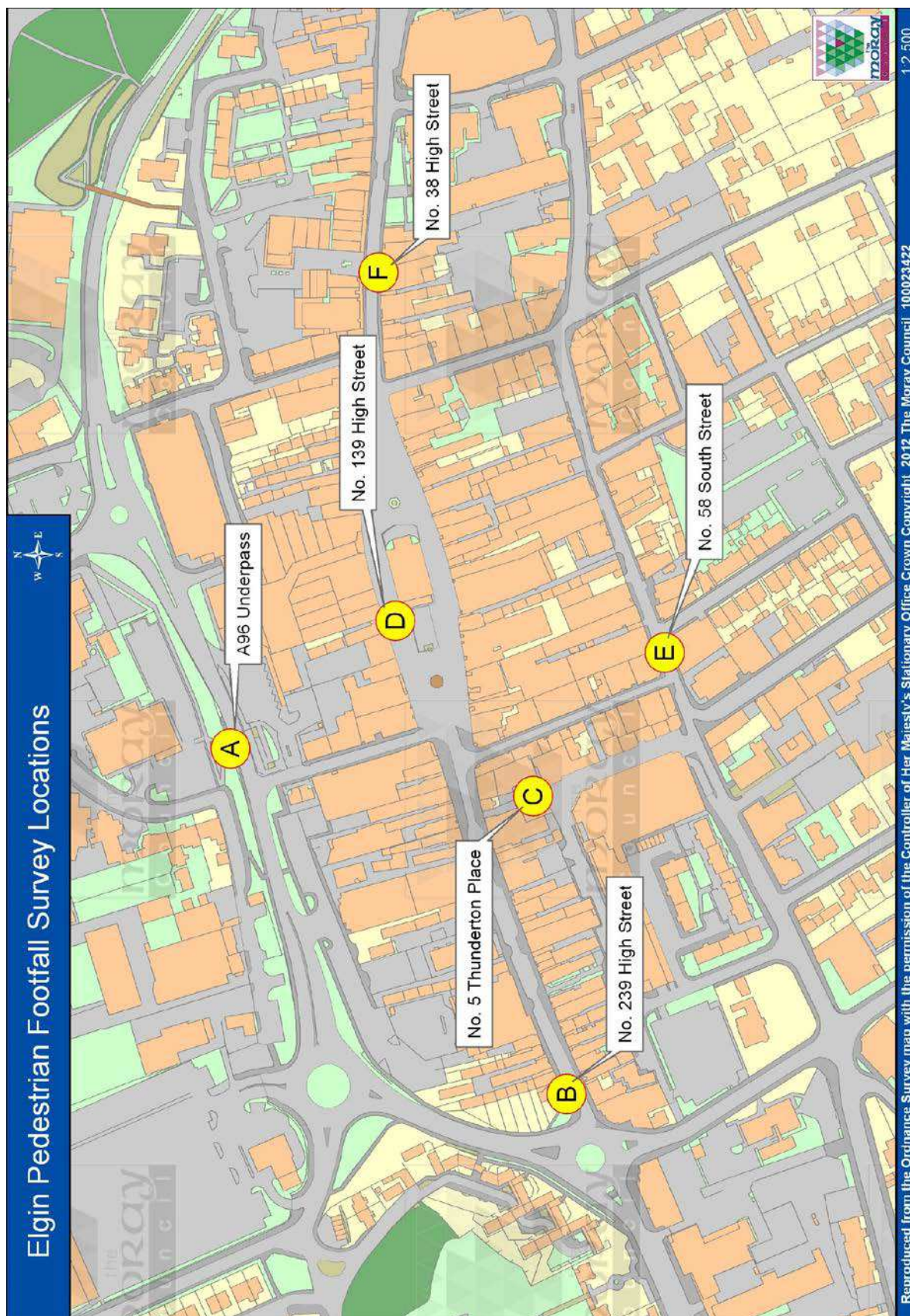
It is notable that Dufftown has 19 Leisure Service outlets (e.g. restaurants, cafes, hotels and guesthouses etc.) which illustrate the importance of tourism to the centre. Convenience shopping needs are provided for by a number of smaller store units, such as the Co-operative stores in Aberlour, Dufftown and Fochabers. Rothes is serviced by a McColls outlet. The vacancy rate in Rothes was 11%, which is above 10% used in Scotland to indicate the relative health of a town centre. However vacancies here only represent three units. In all other towns vacancy rates are below 10%.

## Appendix I: Location of Key Centres

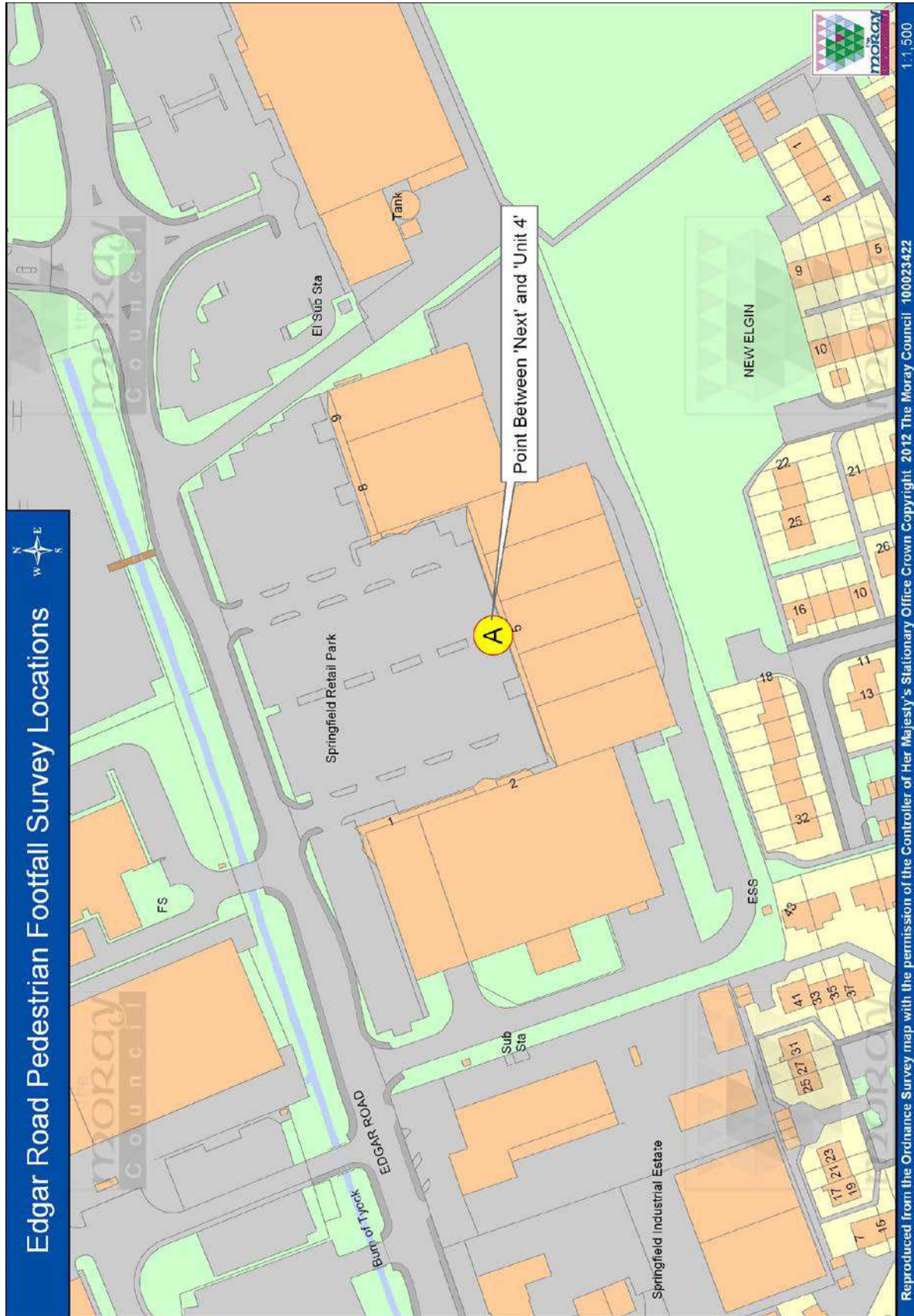




## Appendix II: Plans of Footfall Survey Locations



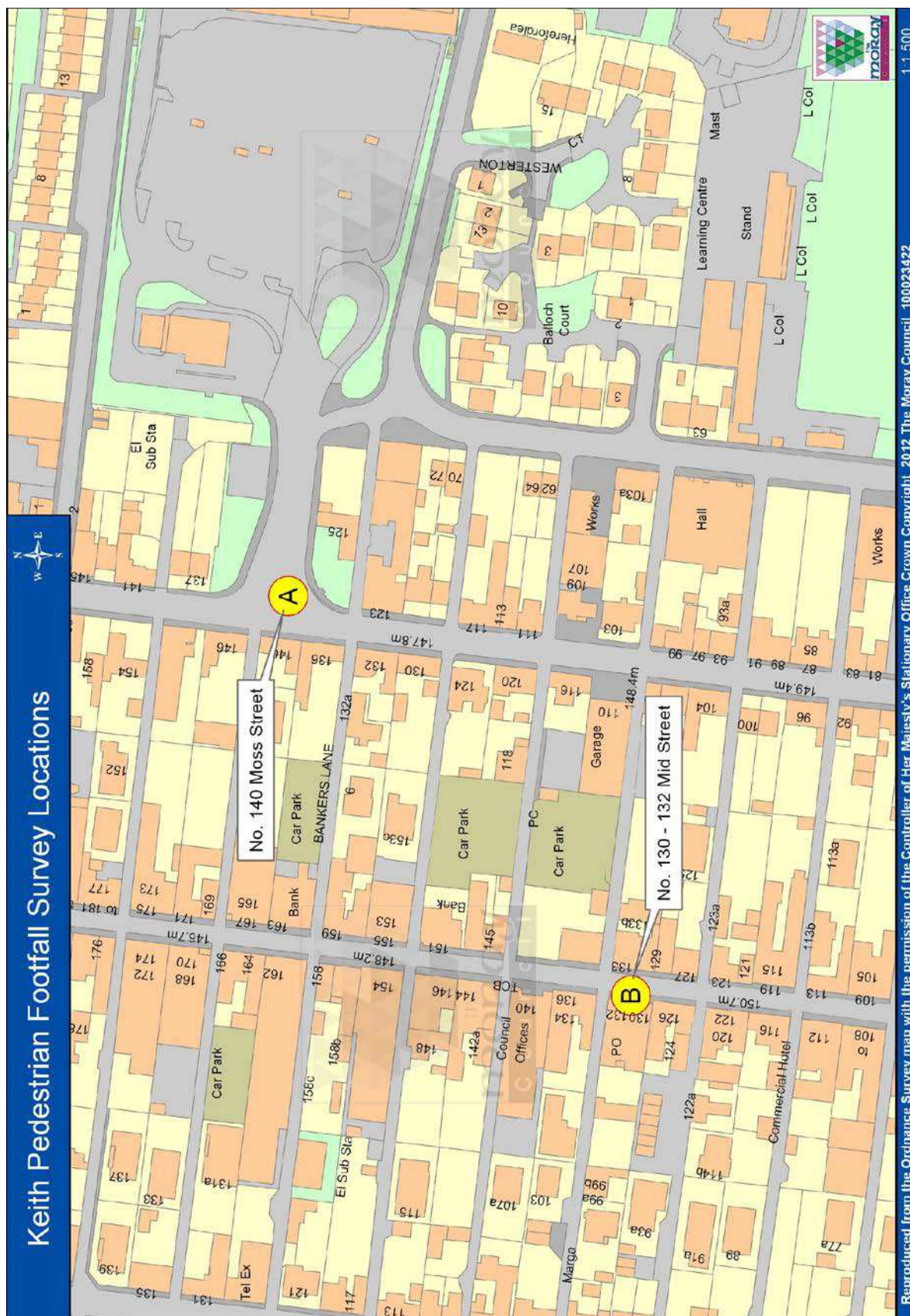




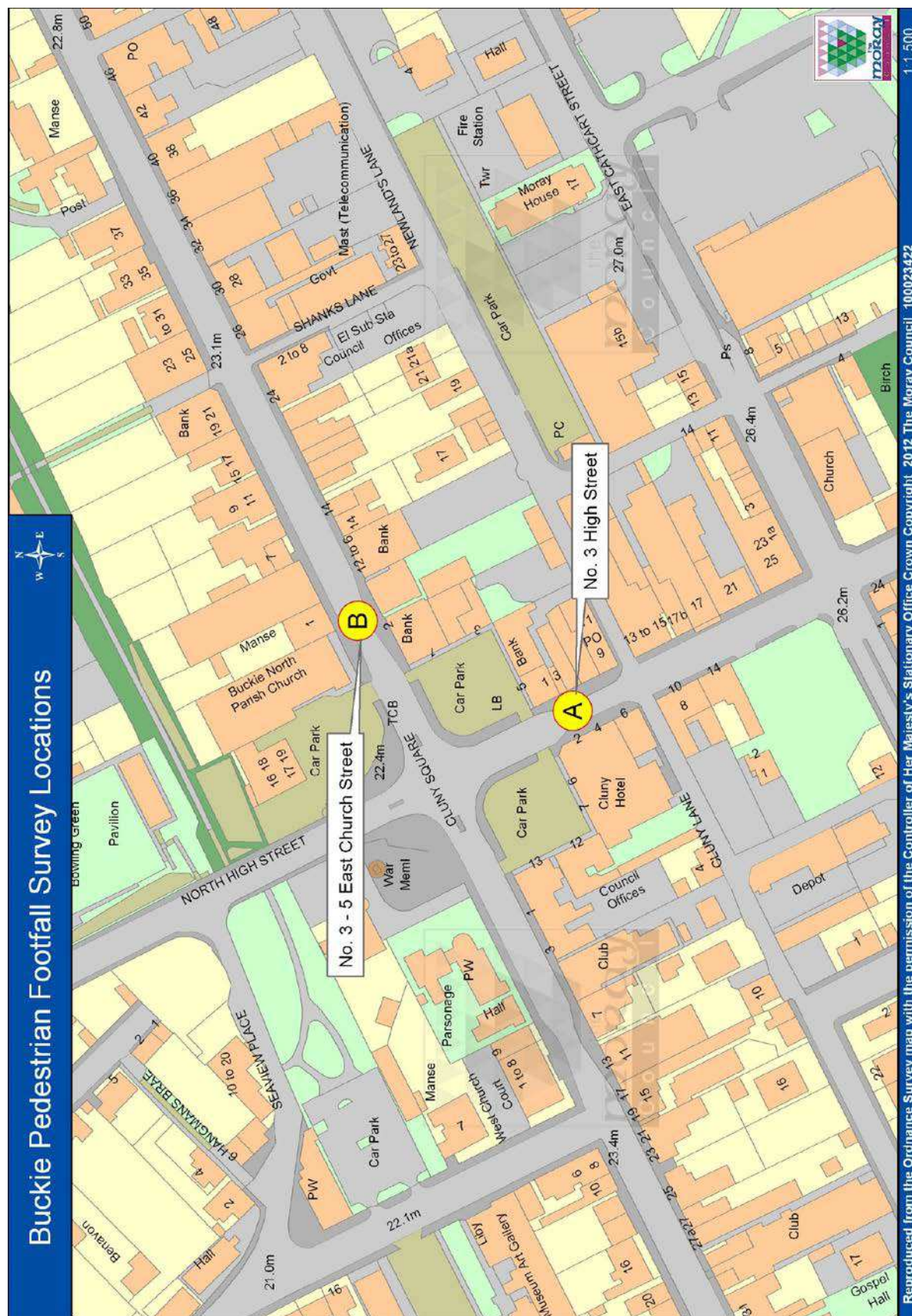




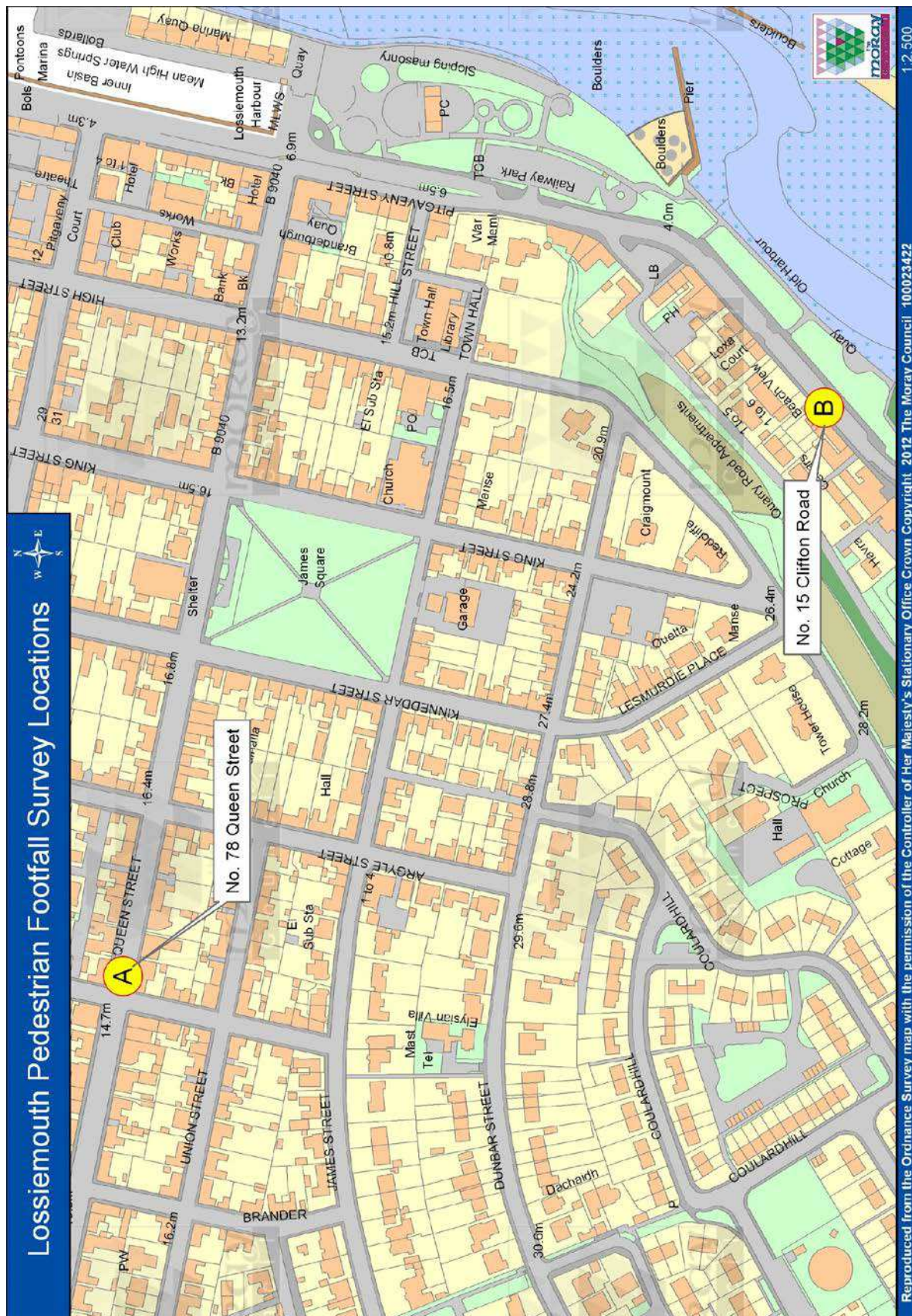












### Appendix III: GOAD Categories and Classifications

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



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

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

<b>Service</b>	Public Service	TA/Cadet Centre	PS 10
<b>Service</b>	Public Service	Tourist Information	PS 11
<b>Service</b>	Religious Service	Place of Worship	REL
<b>Vacant</b>	Vacant Retail	Vacant Shop	VAC 1