Town Centre Health Checks 2009









Technical Report: Results and Analysis

Purpose

1.1 The purpose of this report is to present the results of the 2009 Aberdeenshire town centre health checks.

1.2 The results are presented so as to enable an understanding of how the vitality and viability of a number of Aberdeenshire town centres has changed, since 2003. The results are not to be considered as definitive of the well-being of a town centre, but rather they provide an evidence-based perspective on this matter.

Background

2.1 *SPP 8: Town Centres and Retailing* advises that a town centre health check is an appropriate monitoring tool, to measure the strengths and weaknesses of a town centre (SPP 8, paragraph 35).

2.2 The document: *Assessing the Impact of Retail Developments in Aberdeenshire (December 2004)* includes details of a method for undertaking town centre health checks. This methodology provides a consistent basis for town centre studies within Aberdeenshire, and it has been used to guide the 2003, 2005, 2007 and 2009 town centre health checks.

2.3 A town centre health check involves a survey of a town centre. Members of Aberdeenshire Council's Planning Policy Team undertook site visits for the town centre health checks during July and August 2009, for purposes of completing the surveys.

2.4 The approach adopted during the 2007 town centre health check was predominantly adopted, for the 2009 health check. There were some amendments made that are stated in the 2007 *Technical Report: Advice on Procedures* which was written following the 2007 town centre health check had been undertaken.

2.5 In common with the three previous studies, the 2009 town centre health checks covered nine Aberdeenshire settlements. The towns included were: Banchory, Banff, Ellon, Fraserburgh, Huntly, Inverurie, Peterhead, Stonehaven and Turriff. The town centre area for each town was defined as that identified in the 2006 Aberdeenshire Local Plan.

2.6 All of the nine towns considered have a population over 3,000 people, are main settlements in the adopted 2006 Aberdeenshire Local Plan and have a defined town centre within the proposals maps. Not all main settlements within this plan were surveyed due to time constraints and the same town centres were covered in the three previous town centre health checks undertaken for Aberdeenshire.

2.7 Each town centre was scored between 1 and 5, against 30 different indicators. Of the 30 indicators, 13 were scored during site visits, whilst the remaining 17 required the collection of data (or other desk-based work) and so were scored after the fieldwork had been completed. A score of 1 constitutes a poor performance against a particular indicator, whereas a score of 5 constitutes an excellent performance. A score of 3 is to be thought of as a satisfactory result.

2.8 The indicator: retailer demand, which was considered in both the 2003 and 2005 studies, was omitted from the 2009 study due to time constraints similar to what occurred in 2007 and due to a turnover of staff within the Planning Policy Team. The indicator: Recorded crime, which was considered in the three previous studies, was omitted due to the community team who the figures are obtained from, not knowing the boundaries for which the crimes were to be recorded within, meaning their data was for the whole town and not just the defined town centre making the data unusable. The 13 indicators scored during the site visit were not available for Banchory in 2009. This was due to a turnover of staff and the misplacement of data collected. The other 17 indicators were able to be scored using what data was available and undertaking further desk based work. This is the same reason why certain other indicators are missing for some of the other town centres. An average score has still been given for each town centre so they can be compared but this average is calculated only using the indicators that have been available. This means that although the averages are comparable they are not all calculated against the same amount of indicators, so this must be taken into consideration when reviewing the scores.

2.9 The following indicators were all taken to be the same as the 2007 study, unless there was an obvious change noted when the site visit was being undertaken: Existence and quality of a farmers market, car parking, presence of pubs and clubs, cultural and community facilities, and rental values figures.

2.10 A town centre health check is a comparative study of town centre environments. The town centres are thus to be scored in a relative fashion i.e. if one town centre is judged to out-perform all others to a considerable extent, it may be awarded a score of 5 and the others a score lower than this. Scores provided on 2009 site visits were revised if they were thought to exaggerate the performance of a particular centre, once all town centres had been considered (i.e. after all site visits had been completed).

Outcomes to the 2009 Town Centre Health Checks

3.1 The results of the 2009 town centre health checks have been presented so as to allow a consideration of both the relative performance of each centre in 2009 and the relative change in performance for each centre, from 2003 to 2009.

3.2 The four tables shown in Appendix 1 give an overview of the study findings from 2003 - 2009. These tables have been used as the basis for the subsequent analyses, regarding each of the town centres.

3.3 In the case of each town centre, remarks on the overall performance in 2009 have concentrated on those indicators (or sets of indicators) against which the town centre scored particularly well, or particularly badly. Because the same broad methodological principles were followed with regard to each of the indicators for each of the four studies, a broad comparison of the average scores for a town centre has been used to suggest overall changes to the well-being of individual town centres. In addition, any change in the ranking of town centres (by average score) over the course of the four studies has been noted.

3.4 To assist the reader in obtaining a brief overview of the vitality and viability of a town centre, a set of “key facts” has been assembled for each of the nine centres. These “key facts” appear in boxed sections of text, following a general discussion on the performance of each centre. It should be noted that comparative terms (e.g. ‘high’ or ‘low’) appearing in these boxed sections of text are to be understood as relating to a comparison between scores for each of the nine town centres (or, alternatively, between the data obtained for each of the nine town centres), taken from the 2009 health check study.

Technical note: comments on interpreting the scores

3.5 A broad comparison between the results of the 2003, 2005, 2007 and 2009 town centre health checks has been made in the case of each town centre, rather than an in-depth mathematical comparison between different scores.

3.6 It should be noted that a straightforward mathematical comparison between the scores given for the 2003, the 2005, the 2007 and the 2009 town centre health checks may be of only limited value. Despite the consistent fashion in which procedures have been undertaken for each of the health check studies, it should be acknowledged that scores represent qualitative evaluations of a town centre. Given this, one may expect that different individuals would respond differently, in the same circumstance. As different members of staff were involved in the four town centre health checks, it may thus be thought that a difference in the scoring of a particular indicator would present an indeterminate conclusion. However, there are several reasons why this concern does not restrict a broad comparison of the scores for the different health checks:

- The same principles were followed by each group of researchers in scoring the indicators for the four studies, and (in the case of the more subjective indicators considered on site visits) similar pro formas have been used to guide the researchers’ considerations.
- None of the indicators evaluated on site visits are scored by a single individual, but rather a common score is agreed between the researchers.
- Many of the indicators are scored on the basis of quantitative data and in an easily repeatable manner (see the document: *Assessing the Impact of Retail Developments in Aberdeenshire (December 2004)* for details).
- There are at least 30 different indicators considered in each of the studies and as such, the effect of any individually contentious score on the average is negligible.

3.7 It is suggested that a comparison between the different average scores can be made, provided that the capacity for variation in the individual scores used in obtaining this average is acknowledged, when discussing the significance of the comparison. For the reasons given above, it should be noted that this capacity is finite.

Banchory

Results for Banchory – 2009 Health Check

3.8 Banchory is the highest ranked town centre along with Inverurie, in the 2009 town centre health checks (see Appendix 1). There is a high variety of specialist independent shops and pubs within the town centre. There were also few vacant units within the town centre, with there only being 3, although this has increased from 1 in 2007.

3.9 Although the vacancy rate within the town centre has increased it still scores highly compared to other town centres, with only Inverurie and Ellon having less vacant properties.

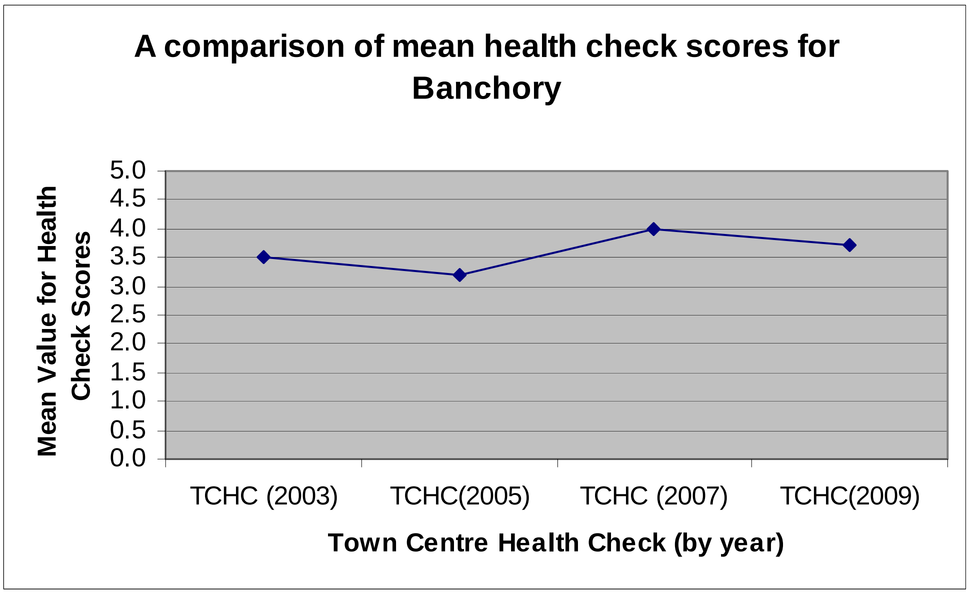
3.10 The town centre did, however, receive less than satisfactory scores for the indicators: ‘availability of food shopping’ and ‘diversity of uses’. With regard to the second indicator, a large proportion of the retail premises in Banchory operate as hairdressers or food and drink uses, with a reasonably high proportion of furniture-related stores also in evidence. There is also a high presence of financial and professional services, This is judged to have an adverse effect on the diversity of uses present in the town centre, relative to other centres across Aberdeenshire with it scoring the lowest equal score for ‘diversity of uses’ alongside Ellon.

3.11 With regard to the sets of indicators provided in Table 1 of Appendix 1, Banchory scores highly compared to other town centres for the indicators, that were available with the exception of those relating to the topic of accessibility. Banchory was seen to have only adequate car parking facilities and the number of public transport routes available from the area, limited its score while also due to several indicators not being available for comparison between other town centres.

Results for Banchory – 2003 to 2009

3.12 The 2009 average (mean) score for Banchory town centre is less in value than the average scores obtained for the 2007 health check study but is still greater than both the 2003 and the 2005 studies (see Figure 1 overleaf). Given there being several indicators missing from the 2009 average it does mean it is not as reflective of the town centre as the previous studies. This means that although the score is lower than 2007 it is likely that it would be higher and of a similar level if all indicators were available. This may be interpreted to indicate that Banchory town centre has not experienced a loss of vitality or viability between 2007 and 2009, relative to the other eight town centres considered within the study.

Figure 1. 2003, 2005, 2007 & 2009 Mean Health Check scores for Banchory town centre



<u>2009 Town Centre Health Check Key Facts – Banchory</u>

- Small amounts of vacant floorspace;
- A significant proportion of specialist independent stores within the town centre;
- Few convenience outlets within the town centre area, one less than 2007;
- A high presence of financial and professional services within the town centre;
- Low diversity of uses, with a much higher percentage of comparison and service units;
- No low quality discount shops and only 1 charity shop present;
- Good presence of pubs within the town centre.

Actions Points:

- Improve the availability of food shopping within the centre.

Banff

Results for Banff – 2009 Health Check

3.13 Banff town centre is ranked eighth out of the nine town centres considered within the 2009 study. The vacancy rate (measured in terms of the proportion of total retail premises observed as being vacant) is particularly high relative to the other town centres, although there are 5 less vacant units than 2007. Related to this, the proportion of total retail floorspace calculated as vacant is high for the town centre and this vacancy problem is much in evidence on Bridge Street. Also on the High Street there are two stores at either end which are prominent large stores which remain empty despite 'incentives being available' for their use. Although the number of convenience stores is low, the 'availability of food shopping' indicator does not take into account the quantity of floorspace. In relation to this, it should be noted that one of the convenience shops within the town centre is a Tesco supermarket.

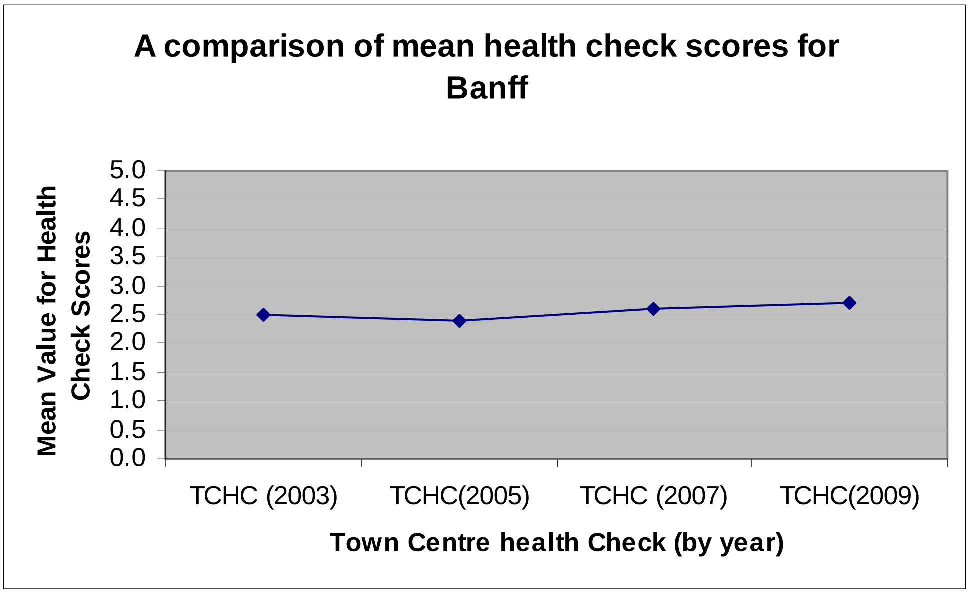
3.14 The town centre environment did however score favourably relative to some of the other eight town centres considered (see Appendix 1). The Georgian architecture and the narrow lanes which connect the upper and lower parts of the town, along with its cleanliness and lack of litter gives it a unique and attractive shopping environment.

3.15 With regard to the sets of indicators provided in Table 1 of Appendix 1, Banff was judged to perform less well than all other town centres considered within the study, for the set of indicators relating to the topic of accessibility. The town centre though performs well in terms of diversity of uses scoring a top equal score with Stonehaven.

Results for Banff – 2003 to 2009

3.16 The 2009 average score for Banff town centre is slightly greater in value than the average scores obtained for the previous three health check studies (see Figure 2 overleaf). Given that this comparison may be variously interpreted (see paragraph 3.4), the variation is not considered to be significant. As such, the results indicate that the vitality and viability of Banff town centre has not appreciably altered since 2003, relative to the other eight town centres considered within the study.

Figure 2. 2003, 2005, 2007 & 2009 Mean Health Check scores for Banff town centre



<u>2009 Town Centre Health Check Key Facts – Banff</u>

- Large amounts of vacant retail floorspace;
- Vacant premises have a significant detrimental impact on some areas of the town (e.g. Bridge Street);
- Topography and densely developed streets and alleys makes the majority of the centre very inaccessible for the less mobile;
- There is a good diversity of uses within the town centre, with a high proportion of the retail premises used for the provision of retail services (e.g. hairdressers);
- While the town centre would be bicycle friendly in terms of access there is no facilities in terms of racks for storage;
- A good quality town centre environment is provided, with there being good overall cleanliness and quality of the buildings.

Action Points:

- Address the impact of vacant premises (in particular along Bridge Street);
- Improve the quality of public transport by providing better shelter at bus stops and further timetable details.

Ellon

Results for Ellon – 2009 Health Check

3.17 Ellon town centre is ranked fifth equal out of the nine town centres considered within the 2009 study. The levels of pedestrian footfall recorded during the site visit improved significantly from the 2007 study. It is still the second lowest footfall observed throughout the study due to the main roads through the town centre being busy with both cars and HGVs. This is not helped by the lack of traffic calming measures, although parked cars do provide a slowing mechanism, while there are also no provisions for cyclists.

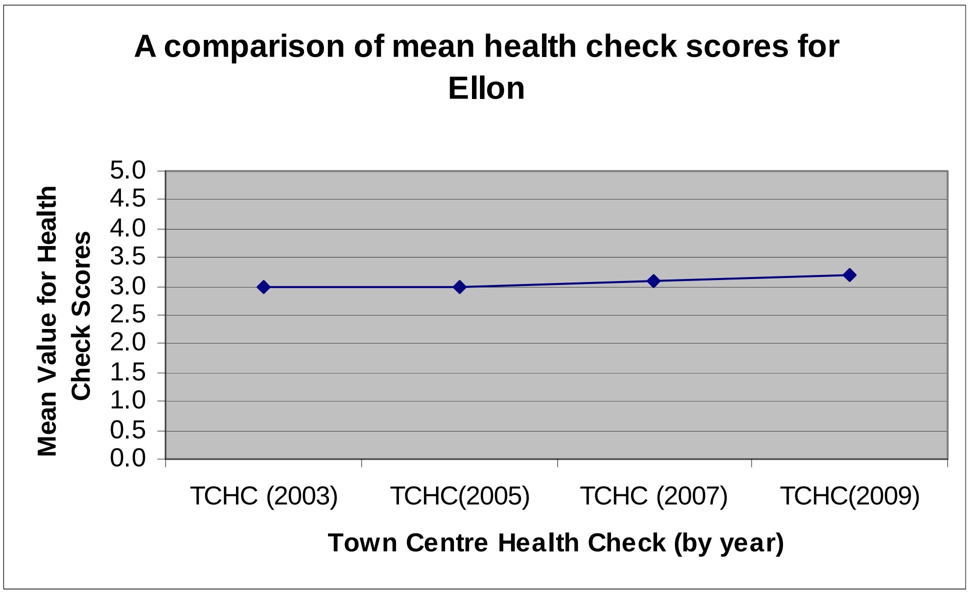
3.18 In contrast to the aforementioned negative aspects of the 2009 health check for Ellon, the appearance of properties are in a good state of repair, although some do feel a bit dated and old fashioned. There is evidence of recent investment by retailers on their shops with them being kept in a good condition, and window displays also being modern and fresh. The town centre is also very clean and well maintained with no visible signs of graffiti. There are very few vacant retail units in the town centre with several also being refurbished for other uses. Due to no properties being boarded up or vandalised it makes the vacant properties inconspicuous and does not affect the health of the town centre.

3.19 With regard to the sets of indicators provided in Table 1 of Appendix 1, Ellon was judged to be the equal worst town centre in terms of the diversity of uses and the number and range of shops. This reflects the poor number of convenience units within the town centre. Despite this, Ellon was judged to be the third highest town in the study in terms of the retailer representation, due to its good variety of specialist independent shops, evidence of recent investment by retailers and there being no low quality discount shops present. The town also scores the highest in terms of the effect vacant properties have on the centre with it scoring the highest points possible in each of the three indicators.

Results for Ellon – 2003 to 2009

3.20 The 2009 average score for Ellon town centre is slightly greater in value than the average scores obtained from both the three previous health check studies (see Figure 3 overleaf). Given that this comparison may be variously interpreted (see paragraph 3.4), the variation is not considered to be significant. As such, the results indicate that the vitality and viability of Ellon town centre has not appreciably altered since 2003, relative to the other eight town centres considered within the study.

Figure 3. 2003, 2005, 2007 & 2009 Mean Health Check scores for Ellon town centre



<u>2009 Town Centre Health Check Key Facts – Ellon</u>

- Very few vacant retail units within the town centre;
- A large number of public transport routes connect the town centre to other areas (e.g. to Aberdeen and to towns in Buchan).
- The quality of the town centre environment is high with it being clean, maintained well and with the buildings also being kept in a good state of repair. The value of the open space is questioned due to being of a built form rather than green space.
- Approximately half of the retail premises are used for the provision of retail services, with a large proportion of this being food & drink outlets (cafes and restaurants);
- Traffic is intrusive in parts of the centre and has a negative impact on pedestrian movement;
- No provision for cyclists within the town centre.

Action Points:

- Address the impact of traffic in certain areas of the town centre (in particular, along Bridge Street);
- Improve access for the less mobile making movement easier;
- Improve the diversity of retail uses in the town centre.

Fraserburgh

Results for Fraserburgh – 2009 Health Check

3.21 Fraserburgh town centre is the lowest ranked of all of the town centres in the 2009 health checks (see Appendix 1). The town centre scores low compared to other centres due to; poor evidence of recent investment by retailers, many small shops are in quite a poor condition, especially in the core shopping area, and high vacancy rates with a large amount of vacant floorspace due to several large units being vacant which should be the prime retail spaces.

3.22 Fraserburgh did however score favourably with regard to the diversity of uses indicator. A diverse range of shops was observed, with only three shop categories not being represented. There are good numbers of general comparison stores (e.g. clothing and electrical stores) throughout the centre, and one of the largest proportions of retail service uses (e.g. cafes and hairdressers) compared to other centres within the study.

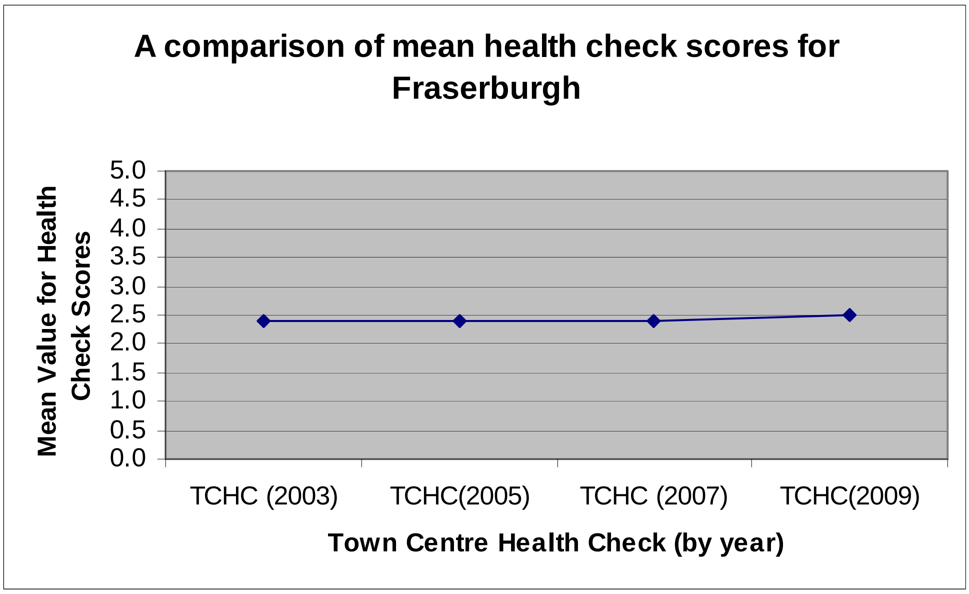
3.23 It is also felt that the impact of traffic within the town centre is minimal, and is one of the best in the study especially due to being the second largest town in terms of population. The reason for this good level of traffic impact is that there is a one way system in place, where traffic can access the town centre but it still means pedestrians are able to cross the streets without a problem. This good ease of movement for pedestrians is helped due to the town centre's functional 19th Century planning with wide streets and pavements, as well as there being good signposting and appropriately placed pedestrian crossings.

3.24 With regard to the sets of indicators provided in Table 1 of Appendix 1, Fraserburgh scores lower than the other eight town centres in terms of the quality of the town centre environment and in terms of retailer representation. Regarding the latter set of indicators, Fraserburgh scores so poorly because there is little evidence of recent investment by retailers, with many shops being in a poor state of repair and the town centre also has the largest amount of low quality discount shops within the study.

Results for Fraserburgh – 2003 to 2009

3.25 The 2009 average score for Fraserburgh town centre has increased by 0.1 compared to the previous three studies (see Figure 4 overleaf). The results indicate that the vitality and viability of Fraserburgh town centre has not appreciably altered since 2003, relative to the other eight town centres considered within the study.

Figure 4. 2003, 2005, 2007 & 2009 Mean Health Check scores for Fraserburgh town centre



2009 Town Centre Health Check Key Facts – Fraserburgh

- A high number of vacant units are prevalent throughout the town centre with this increasing significantly since 2007, several of these units are also very large;
- The presence and quality of open space is poor, with there being only one area of hard landscaping, with seating, planting and a sculpture situated there;
- There is a diverse range of retail uses across the town centre and a relatively large number of general comparison shops (e.g. clothing and furniture retailers), with only three GOAD categories not being represented;
- No provisions for cyclists through racks or lanes;
- The impact of traffic on the pedestrian environment is low, due to a one way system being in place meaning crossing streets is not a problem.

Action Points:

- Promote investment in retail units and the appearance of properties;
- Promote improvements to open space and public infrastructure;
- Promote the creation of a farmers market.

Huntly

Results for Huntly – 2009 Health Check

3.26 Huntly town centre is ranked seventh out of the nine town centres considered within the 2009 study. It has one of the highest vacancy rates within the study but it must be noted that it has improved since 2007. Traffic also has a very negative impact within the town centre and on the general movement of pedestrians. There is also poor ease of movement for the less mobile in Huntly where there is no special effort to accommodate them and due to the narrowness of the pavements it also counts as a very definite danger to people.

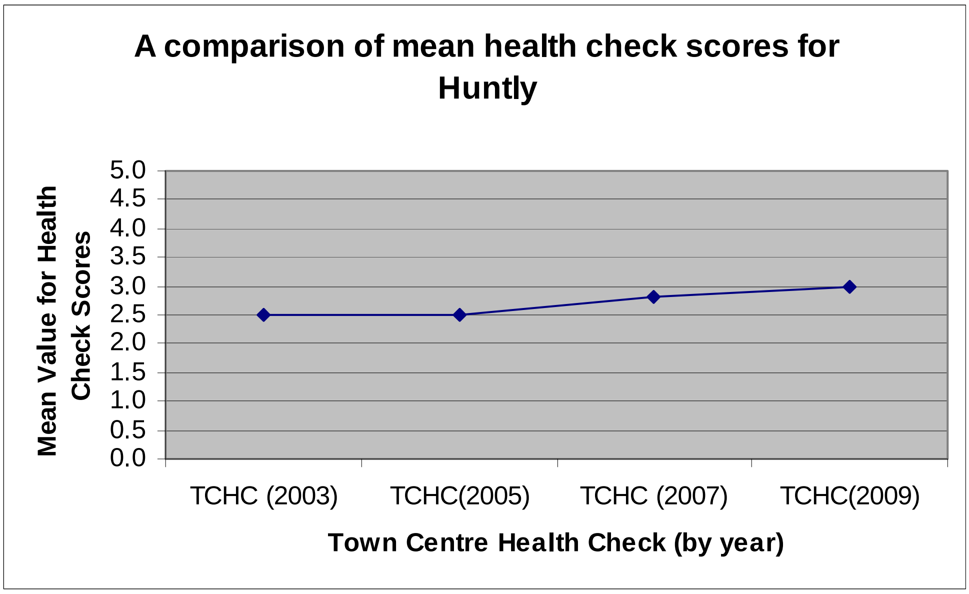
3.27 The positive aspects of the town centre include the appearance of properties, the quality of buildings and the overall cleanliness of the centre – such aspects were judged favourably relative to the other eight town centres. The town centre retains a 19th Century ambience which gives it a positive identity, with the old town part of the centre also having a vernacular style and character of its own with two charming courts. In terms of the appearance of properties there has definitely been an effort made to spruce up the town centre, with several premises appearing to have been given a new coat of paint and it appears as a whole to be clean with there being no overflowing rubbish bins, graffiti or general clutter.

3.28 With regard to the sets of indicators provided in Table 1 of Appendix 1, Huntly scores lower than other town centres (except for Banff) in terms of accessibility. This is due to the negative impact of traffic, lack of provision for cyclists and the lack of public transport routes from the centre compared to others in the study. It does though score reasonably well in the retailer representation set of indicators compared to other towns in the study with it having a good variety of specialist independent shops, a farmers market and a low presence and number of low quality discount shops.

Results for Huntly – 2003 to 2009

3.29 The 2009 average score for Huntly town centre increased slightly again from the previous study, giving it its highest score to date (see Figure 5 overleaf). Given that this comparison may be variously interpreted (see paragraph 3.4), the variation is not considered to be significant. With less indicators available in this years study compared to previous studies as mentioned in paragraph 2.8, the results should be taken to indicate that the vitality and viability of Huntly town centre has not appreciably altered since 2003, relative to the other eight town centres considered within the study.

Figure 5: 2003, 2005, 2007 & 2009 Mean Health Check scores for Huntly town centre.



<u>2009 Town Centre Health Check Key Facts – Huntly</u>

- A relatively high amount of vacant retail premises although less than 2007;
- The range of retail uses is variable, with eight shop types not represented, but other types are well represented considering the total number of retail premises in the town;
- Traffic has a very negative impact on general pedestrian movement;
- There is a good variety of specialist independent shops within the town centre;
- There is a poor presence of cafes, pubs, restaurants and cultural community facilities compared to other town centres within the study;
- There is a high quality town centre environment, due to the quality of buildings, their appearance and the overall cleanliness of the town centre.

Action Points:

- Address the impact of traffic in certain areas of the town centre;
- Promote improvements to the public realm, to increase accessibility for pedestrians;
- Improve the presence of cafes, restaurants, pubs, clubs and cultural and community facilities.

Inverurie

Results for Inverurie – 2009 Health Check

3.30 Inverurie town centre is ranked equal top of the nine town centres considered within the 2009 study. The quality of the town centre environment is high, due to its historical roots and the town square around Market Place which is quaint. But certain shopping precincts on the edge of the town centre such as the Co-op and Farmfoods on Blackhall Road and the Garioch Centre are characterless. The centre is clean with there evidence of considerable regeneration being carried out recently to a significant number of shops.

3.31 Inverurie has the equal lowest vacancy rate in the study with Ellon having only one vacant unit. It also has the best number of multiple retailers present out of the other town centres this is in part due to the new Tesco Superstore on the edge of the centre and the retail park next to the railway station which includes Argos, Halfords, Currys and Homebase. With the high number of multiple retailers it also has a good number and quality of specialist independent shops as well, with a wide range of retail types being represented and only two not being available.

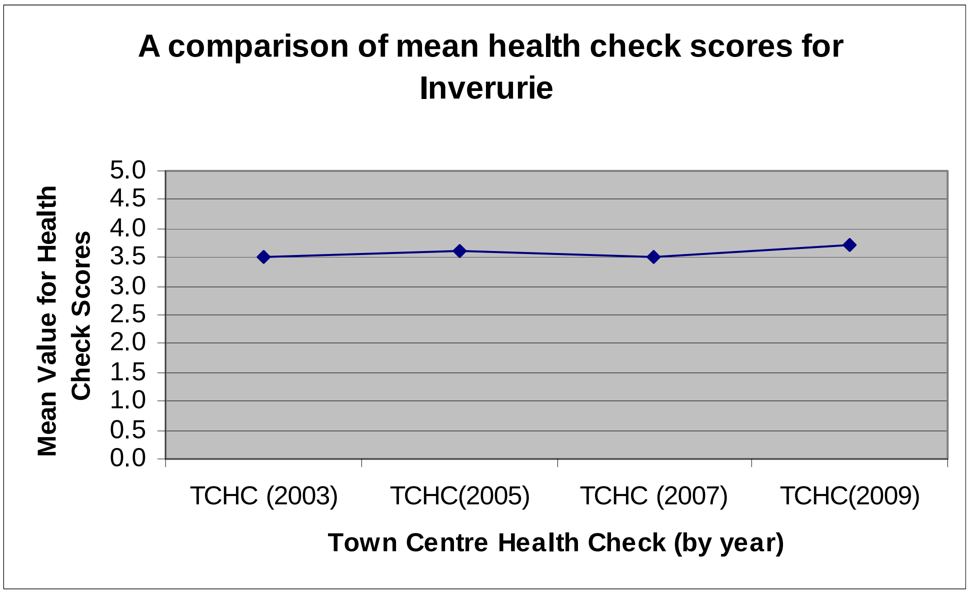
3.32 A negative aspect of the town centre is the impact that traffic has upon it with a busy main road going through the middle of it. There are none or very minimal traffic calming measures in place to reduce this impact and this has also made the provision of facilities for cyclists poor with there being no cycle lanes or boxes and this has led to a number of cyclists travelling along the pavements. There is also a poor ease of movement for the less mobile due to there being few crossings on such a busy road, the lack of provision of dropped kerbs and the very limited use of automatic doors on shops.

3.33 With regard to the sets of indicators provided in Table 1 of Appendix 1, Inverurie scores some of the highest scores each time against the other town centres. Stonehaven has a similar score to Inverurie in terms of retailer representation and accessibility with Inverurie just scoring better in both cases. Although the 2009 pedestrian counts for Inverurie improved from 2007 they were still recorded as the lowest score compared to the eight town centres, which is surprising due to the high overall score which the centre achieved.

Results for Inverurie – 2003 to 2009

3.34 The 2009 average score for Inverurie town centre has increased slightly in value from the average score obtained for the 2007 health check study, and the highest score recorded for the town since the health check studies began (see Figure 6 overleaf). Given that this comparison may be variously interpreted (see paragraph 3.4), the variation is not considered to be significant. As such, the results indicate that the vitality and viability of Inverurie town centre has not appreciably altered since 2003, relative to the other eight town centres considered within the study.

Figure 6. 2003, 2005, 2007 & 2009 Mean Health Check scores for Inverurie town centre



<u>2009 Town Centre Health Check Key Facts – Inverurie</u>

- Only one vacant retail unit within the town centre;
- The quality of the town centre environment is high;
- There is a reasonably good diversity of uses, with only three retail categories not being represented;
- There is a negative impact of traffic on pedestrian environment, with none or very minimal traffic calming in place;
- Has the highest amount of well-known high street retailers (the high street multiples) out of the other eight town centres;
- The quality of public transport is high in the town with several bus routes connecting the town, the surrounding area and also further afield. There is also a railway station which is within walking distance of the town centre.
- Little provision for cyclists within the town centre, with many cyclists travelling on the pavement.

Action Points:

- Promote improvements to accessibility, improving the negative impact of traffic in the town centre and ease of movement for the less mobile through more pedestrian crossings and dropped kerbs;
- Improve the facilities for cyclists through the provision of lanes and boxes.

Peterhead

Results for Peterhead – 2009 Health Check

3.35 Peterhead town centre is ranked third out of the nine town centres considered within the 2009 study. The pedestrianised environment along Marischal Street and at Drummer's Corner provides for ease of movement by foot, throughout a large part of the shopping area. It also limits the impact of traffic on the town centre. The average pedestrian flow was higher than the previous count, but lower compared with the 2005 health check.

3.36 The cleanliness of the town centre is generally good and open space at Drummer's Corner was observed to be well used. However, a lot of litter was observed around Drummer's Corner as this is the principle seating area for the town centre. The public realm in this area is of a high quality, with distinctive street furniture and clear street signage. New signs on the harbour side of the town centre have been observed.

3.37 The closure of Woolworths has had an impact on the provision of comparison goods in the town centre, and its vacancy creates an adverse visual impact on the centre of Marschial Street. However, it has been reported that Iceland may be occupying the vacant site in January 2010. Nonetheless, the provision of food shopping will remain poor, as Iceland only focuses on frozen foods, and not fresh produce such as fruit and vegetables.

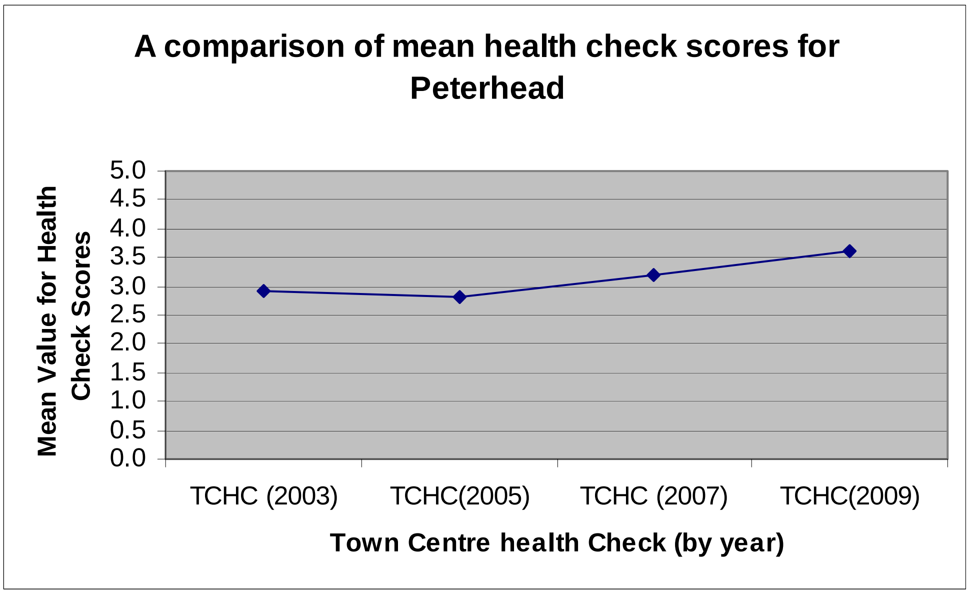
3.38 The availability of food shopping is poor within the town centre, but there is a good variety of specialist independent shops with there being several different small retailers within the town centre. There is also evidence of recent investment by retailers in the town centre with there being new shops opened, signs of improvement to existing shops and the overall signage and appearance of shops being good.

3.39 With regard to the sets of indicators provided in Table 1 of Appendix 1, Peterhead scores higher than the eight other town centres in terms of accessibility. This reflects the high scores given due to the ease of movement for pedestrians and the relatively high number of transport routes connecting the town centre to other areas. By contrast, it scores particularly poorly again with regard to vacant properties compared to other town centres. This is because it has the second highest number of vacant retail units in the study and the largest amount of vacant floorspace which is especially due to the closure of Woolworths, a predominant retailer in the town centre.

Results for Peterhead – 2003 to 2009

3.40 The 2009 average score for Peterhead town centre is higher in value than the average score obtained from the previous health check studies (see Figure 7 overleaf). Given that this comparison may be variously interpreted (see paragraph 3.4), the variation is not considered to be significant. As such, the results indicate that the vitality and viability of Peterhead has not appreciably altered since 2003, although there is cause for thinking that, as a whole, there has been a positive improvement (in particular, with regard to the quality of the town centre environment and its accessibility).

Figure 7. 2003, 2005, 2007 & 2009 Mean Health Check scores for Peterhead town centre



2009 Town Centre Health Check Key Facts – Peterhead

- A lack of food shopping within the town centre;
- A high number of vacant retail premises within the town centre;
- There is a good ease of movement for pedestrians within the town centre due to the main shopping streets being pedestrianised, which allows easier movement for the less mobile through having wide pavements, and flattened kerbs at appropriately placed pedestrian crossings;
- The built heritage and quality of the buildings are generally good, as is the cleanliness of the town;
- The number and quality of public transport routes are good in the town;
- There is a large amount of small independent shops;
- Little provision for cyclists, with no cycle racks or lanes within the town centre.

Action points:

- Improve the availability of food shopping within the centre;
- Address the problem of vacant units across the centre, especially the large ones;
- Improve the cleanliness of the town at the principle seating areas to a standard the same as the rest of the centre.

Stonehaven

Results for Stonehaven – 2009 Health Check

3.41 Stonehaven town centre is ranked fourth out of the nine town centres considered within the 2009 study. The town centre contains a diverse range of shop types with only three types not being represented. It has the second highest number of convenience units compared with the other eight centres and is only the fourth largest in terms of population. There is a low vacancy rate in the town with it having dropped further from the previous study. The appearance and quality of the town centre is very good with many buildings around the historic town square being quite ornate and grand, while the beach is very close to the town centre there is very little open space and no significant areas for seating within the actual centre itself.

3.42 There is good infrastructure in place for visitors to the town centre with it being well sign posted in traditional iron signing, a tourist information shop on the main throughfare, public conveniences within a short walking distance of the centre and parking available within the town square although this could be better. There is a relatively good ease of movement within Stonehaven due to it having a grid iron pattern layout with some pedestrian crossings, however Allardice Street and Evan Street are particularly busy with traffic, which does make it harder to move around especially as there are very little traffic calming measures in place as well.

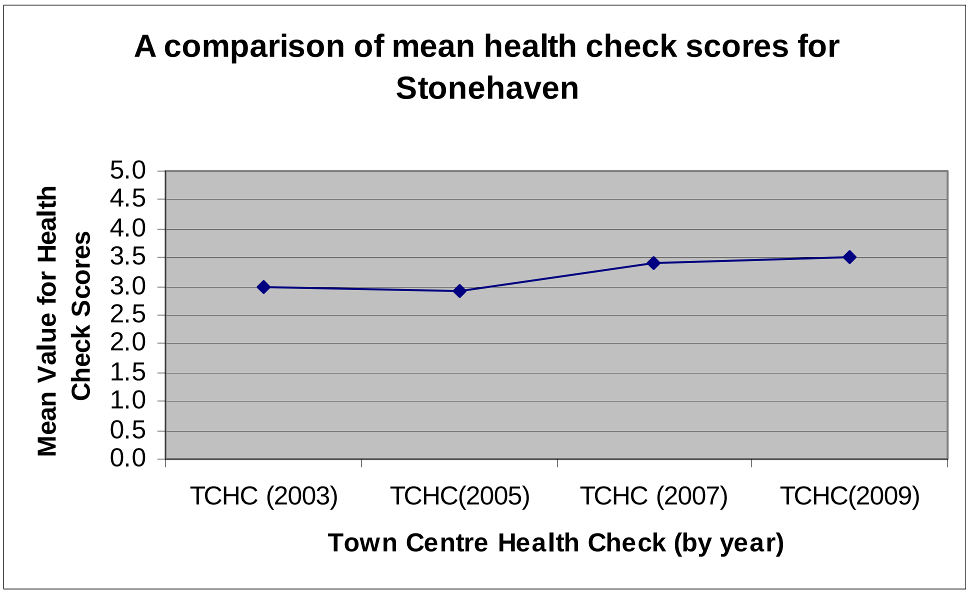
3.43 The negative aspects of the town centre concern the issue of accessibility. Traffic has a significant detrimental impact on parts of the shopping environment and car parking is thought to be the worst compared to the eight other town centres. The town has a good number of public transport routes connecting the centre to other areas and it benefits from its location on the railway line. The bus stops are also of good quality and situated in a central location with a wealth of information regarding timetables etc., also a taxi rank is present outside the market building. The steep inclines to the west of the centre up Evan and Mary Street, along with the narrow pavements which are often busy can also make the ease of movement for the less mobile difficult at times.

3.44 With regard to the sets of indicators provided in Table 1 of Appendix 1, Stonehaven scores well in terms of the quality of the town centre environment, with only Huntly scoring better in this indicator. This is due to the improved quality of buildings, and availability of visitor infrastructure along with a continual good appearance of properties and level of cleanliness. Accessibility is one of the main issues regarding Stonehaven although it has improved slightly since the last study and appears to be about average compared to the eight other centres, it is still something that needs to be addressed to improve the town.

Results for Stonehaven – 2003 to 2009

3.45 The 2009 average score for Stonehaven town centre is just greater in value than the average score obtained for the previous health check studies (see Figure 8 overleaf). Given that this comparison may be variously interpreted (see paragraph 3.4), the variation is not considered to be significant. As such, the results indicate that the vitality and viability of Stonehaven has not appreciably altered since 2007, although the increase observed in the accessibility indicators (from 2003 through to 2009) and the improvement in the quality of the town centre environment is encouraging.

Figure 8. 2003, 2005, 2007 & 2009 Mean Health Check scores for Stonehaven town centre.



<u>2009 Town Centre Health Check Key Facts – Stonehaven</u>

- A small amount of vacant retail units, having fallen further from 2007;
- There is a good diversity of retail uses, with only three uses not being identified, making it one of the best in this study for this indicator;
- The best number of public transport routes available in the study, including having a railway station close to the centre;
- Traffic has a negative impact on the town centre due to the high volume of traffic, lack of calming measures, pedestrian crossings and the poor use of car parking facilities especially in the town square;
- Little provision for cyclists within the town centre, no cycle lanes or storage is present;
- There is a good variety of specialist independent shops and very few discount shops;
- There is a good feeling of security throughout Stonehaven's town centre due to it being busy and having a predominantly open streetscape.

Action Points:

- Try to find a solution for the car parking problem and create more provisions for cyclists in the area;
- Improve the impact of traffic in the centre through traffic calming measures.

Turriff

Results for Turriff – 2009 Health Check

3.46 Turriff town centre is ranked fifth equal out of the nine town centres considered within the 2009 study. The town centre environment is of a high quality, with shop frontages being kept in a good condition, with them remaining traditional while having modern functional signage fitted. The streets are also very clean with there being no litter or graffiti present. The diversity of retail uses is reasonably good with there being a very good presence of financial and professional services, along with only one low cost discount shop being located in the town centre. There is also a good variety of specialist independent stores, with the majority of retail units coming under this in the centre which means it has the lowest number of multiple retailers present in the study.

3.47 There is a small amount of vacant properties in the centre which are in a good condition meaning they do not stand out and blend in well with the surrounding properties. Car parking is readily available within the town so it is not usually an issue for visitors, although there is a lack of visitor signage to help direct a tourist around the town. Traffic has a negative impact on the ease of pedestrian movement within the town with there being several busy roads going through the centre which makes it vehicle dominated. This is also enhanced by the lack of crossing points in the town and there being no traffic calming measures present.

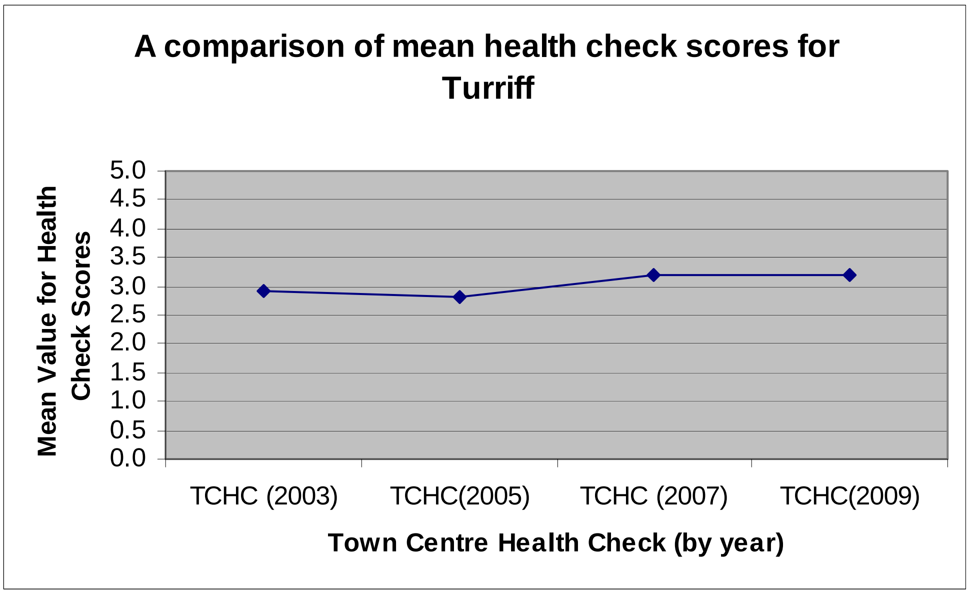
3.48 Regarding the issue of accessibility, the number of public transport routes connecting Turriff to other areas is small, relative to the other centres. But the quality of public transport is slightly better due to the bus stops being located centrally, being in a good condition and displaying a wealth of information. No taxi ranks were identified to be present though. In addition, the ease of movement for the less mobile is adequate with drop kerbs being located at convenient points and the topography of the town being relatively flat.

3.49 With regard to the sets of indicators provided in Table 1 of Appendix 1, Turriff scores relatively well in terms of diversity of retail uses especially due to its size and lack of multiple retailers, with it also slightly improving from the previous study. By contrast, the scores for the accessibility indicators is relatively low with it declining by a few points from the previous study, although it does have good car parking facilities and is not the lowest for these indicators compared to other centres in the study.

Results for Turriff – 2003 to 2009

3.50 The 2009 average score for Turriff town centre has remained the same since the previous study in 2007 (see Figure 9 overleaf). Given that this comparison may be variously interpreted (see paragraph 3.4), the variation is not considered to be significant. As such, the results indicate that the vitality and viability of Turriff has not appreciably altered since 2003, although the overall increase observed in the score for the diversity of retail uses, the increase in variety of specialist independent shops and vacant property sets of indicators (from 2003 to 2009) may be taken to be encouraging.

Figure 9. 2003, 2005, 2007 & 2009 Mean Health Check scores for Turriff town centre.



2009 Town Centre Health Check Key Facts – Turriff

- A small number of vacant retail premises being present within the town centre, which are in a good condition and do not stand out;
- A high quality, safe shopping environment, although being predominantly dominated by vehicle movements;
- Relatively few well-known high street retailers (multiple retailers);
- Little provision for cyclists within the town centre, with no lanes or storage facilities present;
- A good diversity of retail uses present, especially due to the size of the town;
- Very little quality open space within the defined town centre, although extensive areas of green space are only a short walking distance away;
- There are a good variety of pubs scattered throughout the town, as well as there being a small museum located in the centre.

Action Points:

- Promote investment to attract well-known high street retailers;
- Improve the town square to provide some sort of communal area which the centre lacks;
- Provide traffic calming measures and more pedestrian crossings to reduce the impact of traffic and encourage further pedestrian movements.

Results of the Town Centre Health Checks 2009

Indicator	Factor	Stonehaven	Peterhead	Inverurie	Ellon	Banff	Fraserburgh	Turriff	Huntly	Banchory
Retailer representation	Number of multiple retailers	4	4	5	3	2	3	1	3	3
	Variety of specialist independent shops	4	4	4	4	2	3	4	4	5
	Existence and quality of a farmers market	4	2	4	3	4	1	2	4	4
	Availability of food shopping	3	1	2	2	2	2	3	3	2
	Evidence of recent investment by retailers	4	4	4	4	3	2	4	3	N/A
	Retailer demand	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
	Presence and number of charity shops	3	2	3	3	4	3	2	3	4
	Presence and number of low quality discount shops	4	4	5	5	3	2	5	4	5
		26	21	27	24	20	16	21	24	23
Accessibility	Ease of pedestrian movement	3	5	3	2	3	4	2	3	N/A
	Provision of facilities for cyclists	2	2	1	1	1	1	1	1	N/A
	Traffic Impact	2	5	2	1	2	4	2	1	N/A
	Car parking	1	5	4	4	3	3	4	3	3
	Number of public transport routes	5	4	4	4	2	3	2	2	3
	Quality of public transport	4	5	5	2	2	3	3	3	N/A
	Ease of movement for the less mobile	3	4	2	2	1	2	3	2	N/A
		20	30	21	16	14	20	17	15	6
Diversity of uses, number & range of shops	Diversity of uses	4	3.5	3.5	2.5	4	3.5	3.5	3.5	2.5
	Presence of financial and professional services	4	4	4	5	4	3	5	4	4
	Presence of cafes & restaurants	3	4	2	2	2	2	3	2	4
	Presence of pubs and clubs	2	5	4	2	3	2	4	2	5
	Presence of cultural & community facilities	3	4	4	2	2	3	4	2	3
		16	20.5	17.5	13.5	15	13.5	19.5	13.5	18.5
Quality of town centre environment	Appearance of properties	4	3	5	4	3	2	4	5	N/A
	Overall cleanliness	4	3	4	5	4	4	5	4	N/A
	Quality of building	4	4	4	3	4	3	3	5	N/A
	Presence and quality of open space	4	4	3	2	N/A	2	2	3	N/A
	Availability of visitor infrastructure	5	4	4	3	4	2	3	5	N/A
		21	18	20	17	15	13	17	22	0
Vacant properties	Vacancy Rate	4	2	5	5	2	1	4	2	4
	Vacant Floorspace	3	1	4	5	2	2	3	2	4
	Effect of vacant premises on the town centre	4	3	5	5	2	2	4	N/A	N/A
		11	6	14	15	6	5	11	4	8
Safety and security	Feeling of security	5	4	4	4	4	3	4	4	N/A
	Recorded crime	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
		5	4	4	4	4	3	4	4	0
Pedestrian flows	Volume of pedestrian flows	3	4	2	3	4	3	4	N/A	N/A
Commercial performance	Rental values	4	3	4	3	1	2	2	1	3
		7	7	6	6	5	5	6	1	3
TOTAL		106	107	110	95.5	79	75.5	95.5	83.5	58.5
AVERAGE		3.5	3.6	3.7	3.2	2.7	2.5	3.2	3.0	3.7

* All averages calculated by dividing total scores by number of indicators available.

Results of the Town Centre Health Checks 2007

Name of set of Indicators	Indicator	Stonehaven	Peterhead	Inverurie	Ellon	Banff	Fraserburgh	Turriff	Huntly	Banchory
Retailer representation	Number of multiple retailers	4	4	4	3	2	3	1	2	3
	Variety of specialist independent shops	4	4	4	4	3	3	4	4	5
	Existence and quality of a farmers market	4	2	4	3	4	1	2	4	4
	Availability of food shopping	3	1	2	2	1	2	3	3	2
	Evidence of recent investment by retailers	4	3	4	3	3	1	3	2	5
	Retailer demand	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
	Presence and number of charity shops	3	2	3	4	3	3	2	3	4
	Presence and number of low quality discount shops	4	3	5	4	2	2	5	4	5
		26	19	26	23	18	15	20	22	28
Accessibility	Ease of pedestrian movement	3	5	3	3	2	2	3	3	4
	Provision of facilities for cyclists	2	2	2	2	1	1	1	2	2
	Traffic Impact	2	5	2	1	3	4	4	2	4
	Car parking	1	3	3	4	3	3	5	3	3
	Number of public transport routes	5	4	4	4	3	3	2	3	2
	Quality of public transport	3	3	4	4	3	4	4	3	4
	Ease of movement for the less mobile	2	3	3	2	2	2	2	2	4
		18	25	21	20	17	19	21	18	23
Diversity of uses, number & range of shops	Diversity of uses	4	3.5	3	2	3.5	4	4	3.5	2.5
	Presence of financial and professional services	4	3	4	5	4	3	5	4	4
	Presence of cafes & restaurants	3	4	2	2	3	2	3	2	4
	Presence of pubs and clubs	2	4	4	2	3	2	2	2	5
	Presence of cultural & community facilities	3	2	4	2	2	3	2	2	3
		16	16.5	17	13	15.5	14	16	13.5	18.5
Quality of town centre environment	Appearance of properties	4	3	4	3	4	2	4	4	5
	Overall cleanliness	4	4	5	4	4	2	4	5	5
	Quality of building	3	3	4	3	4	2	5	4	4
	Presence and quality of open space	3	4	3	4	2	N/A	N/A	N/A	4
	Availability of visitor infrastructure	4	4	3	4	3	3	4	2	4
		18	18	19	18	17	9	17	15	22
Vacant properties	Vacancy rate	4	2	5	4	1	3	4	1	5
	Vacant floorspace	4	3	3	3	1	4	4	2	5
	Effect of vacant premises on the town centre	4	3	4	2	2	2	3	3	5
		12	8	12	9	4	9	11	6	15
Safety and security	Feeling of security	4	4	5	4	4	3	5	5	5
	Recorded crime	4	2	3	4	2	1	5	2	5
		8	6	8	8	6	4	10	7	10
Pedestrian flows Commercial performance	Volume of pedestrian flows	4	3	2	1	3	2	3	5	4
	Rental values	4	3	4	3	1	2	2	1	3
		8	6	6	4	4	4	5	6	7
TOTAL		106	98.5	109	95	81.5	74	100	87.5	123.5
AVERAGE		3.4	3.2	3.5	3.1	2.6	2.4	3.2	2.8	4.0

Results of theTown Centre Health Checks 2005

Name of set of indicators	Indicator	Stonehaven	Peterhead	Inverurie	Ellon	Banff	Fraserburgh	Turriff	Huntly	Banchory
Retailer representation	Number of multiple retailers	3	5	5	5	2	5	2	2	3
	Variety of specialist independent shops	3	3	4	1	3	3	2	3	4
	Existence and quality of a farmers market	3	3	4	3	4	2	1	1	3
	Availability of food shopping	3	2	3	1	2	3	3	3	2
	Evidence of recent investment by retailers	3	3	4	3	2	2	3	2	3
	Retailer demand	3	3	2	3	3	2	2	3	1
	Presence and number of charity shops	4	1	4	3	4	2	3	3	4
	Presence and number of low quality discount shops	3	3	4	4	3	1	4	4	5
		25	23	30	23	23	20	20	21	25
Accessibility	Ease of pedestrian movement	2	4	3	3	2	3	2	3	4
	Provision of facilities for cyclists	1	1	1	1	1	1	1	2	1
	Traffic Impact	3	4	2	1	2	3	1	2	2
	Car parking	2	3	5	4	3	2	4	2	1
	Number of public transport routes	4	4	5	4	2	5	2	3	3
	Quality of public transport	3	4	4	2	2	4	3	3	2
	Ease of movement for the less mobile	2	3	3	1	1	3	3	3	2
		17	23	23	16	13	21	16	18	15
Diversity of uses, number & range of shops	Diversity of uses	4	5	5	3	3	5	3	1	1
	Presence of financial and professional services	2	2	3	3	3	1	3	2	2
	Presence of cafes & restaurants	4	3	3	5	3	3	3	2	4
	Presence of pubs and clubs	2	4	4	2	3	2	2	2	3
	Presence of cultural & community facilities	3	2	4	2	2	1	3	2	2
		15	16	19	15	14	12	14	9	12
Quality of town centre environment	Appearance of properties	3	3	5	3	3	1	3	3	5
	Overall cleanliness	4	4	3	3	4	3	4	4	5
	Quality of building	2	2	4	2	3	3	3	4	4
	Presence and quality of open space	1	2	2	3	2	2	4	3	3
	Availability of visitor infrastructure	1	2	2	3	4	3	3	2	3
		11	13	16	14	16	12	17	16	20
Vacant properties	Vacancy rate	3	1	4	4	1	3	3	2	5
	Vacant floorspace	4	1	2	5	1	2	3	2	1
	Effect of vacant premises on the town centre	3	3	4	4	3	2	4	4	5
		10	5	10	13	5	7	10	8	11
Safety and security	Feeling of security	4	2	4	4	4	1	4	5	5
	Recorded crime	4	2	4	4	1	1	5	2	5
		8	4	8	8	5	2	9	7	10
Pedestrian flows	Volume of pedestrian flows	3	3	4	3	1	2	2	1	5
Commercial performance	Rental values	3	3	4	3	1	2	2	1	5
		6	6	8	6	2	4	4	2	10
TOTAL		92	90	114	95	78	78	90	81	103
AVERAGE		2.9	2.8	3.6	3.0	2.4	2.4	2.8	2.5	3.2

Results of the Town Centre Health Checks 2003

Indicator	Factor	Stonehaven	Peterhead	Inverurie	Ellon	Banff	Fraserburgh	Turriff	Huntly	Banchory
Retailer representation	Number of multiple retailers	3	4	4	3	2	4	2	1	3
	Variety of specialist independent shops	3	3	4	1	3	3	2	3	4
	Existence and quality of a farmers market	3	3	4	3	4	2	1	1	3
	Availability of food shopping	4	2	4	2	2	5	2	3	2
	Evidence of recent investment by retailers	3	4	4	2	2	1	3	2	4
	Retailer demand	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
	Presence and number of charity shops	2	1	3	3	4	2	3	4	5
	Presence and number of low quality discount shops	3	3	4	4	3	1	4	4	5
		21	20	27	18	20	18	17	18	26
Accessibility	Ease of pedestrian movement	3	5	3	3	1	2	3	2	3
	Provision of facilities for cyclists	3	2	2	1	3	1	1	1	2
	Traffic Impact	3	4	2	2	3	3	3	3	2
	Car parking	2	3	5	4	3	2	4	2	1
	Number of public transport routes	4	4	5	4	2	5	2	3	3
	Quality of public transport	3	4	4	4	2	3	2	2	4
	Ease of movement for the less mobile	2	3	3	1	1	2	3	2	2
		20	25	24	19	15	18	18	15	17
Diversity of uses, number & range of shops	Diversity of uses	5	5	4	2	3	5	2	2	2
	Presence of financial and professional services	2	2	3	5	3	1	3	1	2
	Presence of cafes & restaurants	4	3	3	4	3	3	3	2	3
	Presence of pubs and clubs	2	4	4	2	3	2	2	2	3
	Presence of cultural & community facilities	3	2	4	2	2	1	3	2	3
		16	16	18	15	14	12	13	9	13
Quality of town centre environment	Appearance of properties	3	3	4	3	2	2	4	3	4
	Overall cleanliness	3	4	4	4	4	3	4	4	5
	Quality of building	3	3	3	4	4	2	4	4	3
	Presence and quality of open space	3	3	3	3	3	1	4	2	4
	Availability of visitor infrastructure	3	2	2	2	2	3	2	4	4
		15	15	16	16	15	11	18	17	20
Vacant properties	Vacancy rate	2	1	5	4	1	2	3	2	5
	Vacant floorspace	3	2	2	5	1	4	4	4	5
	Effect of vacant premises on the town centre	3	2	2	5	2	2	4	4	5
		8	5	9	14	4	8	11	10	15
Safety and security	Feeling of security	3	2	3	4	4	2	3	4	4
	Recorded crime	4	2	4	4	1	1	5	2	5
		7	4	7	8	5	3	8	6	9
Pedestrian flows	Volume of pedestrian flows	3	3	2	1	3	1	4	2	5
Commercial performance	Rental values	3	3	4	3	1	2	2	1	5
		6	6	6	4	4	3	6	3	10
TOTAL		93	91	107	94	77	73	91	78	110
AVERAGE		3.0	2.9	3.5	3.0	2.5	2.4	2.9	2.5	3.5