

# Aberdeenshire Town Centre Health Check 2015



*'Turra Coo' statue, Turriff*



*Saltoun Square, Fraserburgh*



*Huntly Square*



*High Street, Banchory*



*Biggar Fountain, Banff*



*Shore Street, Macduff*

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# 1. Executive Summary

- 1.1 This report is the latest of the Aberdeenshire Town Centre Health Checks which have been undertaken every 2 years since 2003. This edition is substantially different from previous Health Checks after following new guidance provided in Scottish Planning Policy and the Town Centre Toolkit. The results are presented to enable an understanding of the vitality and viability of town centres in Aberdeenshire.
- 1.2 Aberdeenshire is an extremely attractive area with a variety of coastal, rural, commuter towns, high levels of employment, and there is considerable new housing and employment land planned for the near future. Maintaining town centres' attractiveness, activeness, and accessibility is vital for the region to be able to continue to thrive.
- 1.3 Twelve town centres in Aberdeenshire were studied extensively. Various information garnered from the research was discussed including the town centres' strengths and weaknesses, retail, and levels of footfall through a mixture of written and map & chart based analysis. The town centres were scored between 0-5 on 25 different indicators of health to give an overall comparative ranking in Aberdeenshire. The indicators were all grouped into categories: Retail; Activity, Physical Environment, Property, Accessibility, and Community.
- 1.4 Within those categories, Aberdeenshire town centres in general scored slightly better on their levels of activity and accessibility than their retail and physical environment. Specific areas where town centres generally scored well were the low numbers of vacant units, the public transport infrastructure and facilities, and ease of movement on streets. The areas in which town centres could improve on are encouraging cycling and providing cycle facilities, providing an abundance of pleasant green infrastructure and providing a diversity of retail uses. It is important to maintain activity and accessibility levels in order to attract visitors as well as local residents, and to continue to encourage retailing in town centres in order to stand up to competition from Aberdeen City, out-of-town supermarkets, and E-commerce.
- 1.5 Town centres which consistently scored highly over the range of categories were Inverurie and Turriff. Banchory, Banff, Ellon and Huntly with Peterhead and Stonehaven just behind. Fraserburgh and Westhill were fairly poor while Portlethen and Macduff were found to have a significant lack of resources compared to the other town centres and recorded the lowest scores. Turriff and Banff have both improved from previous Health Checks while Banchory and Stonehaven scored slightly lower, although the majority of towns have remained at a similar level.

## 2. Background

- 2.1 **Purpose of the 2015 Town Centre Health Check** - The purpose of this report is to present the results of the 2015 Aberdeenshire town centre health check. The results are presented to enable an understanding of the vitality and viability of 12 Aberdeenshire town centres including Banchory, Banff, Ellon, Fraserburgh, Huntly, Inverurie, Peterhead, Stonehaven and Turriff. Included for the first time in the series of health checks are Macduff, Portlethen and Westhill. The results are not to be considered definitive of the well-being of a town centre, but rather they are intended to provide an evidence-based comparative perspective on this matter and assist in identifying actions that could be undertaken to improve and maintain their status.
- 2.2 **National policy and guidance relating to town centres** - The Scottish Government devoted a section of *Scottish Planning Policy (SPP)*<sup>1</sup> to 'Promoting Town Centres'. The text advises local authorities to produce town centre health checks every 2 years in order to assess the strengths, vitality and viability, weaknesses and resilience of town centres. This is a way of encouraging local authorities to place a high importance on helping their town centres to thrive and meet the needs of their residents. *SPP* (paragraphs 64-65) intends the health checks to be used to inform development plans and decisions on planning applications, and provides a list of indicators to use in them. The *Town Centre Toolkit*<sup>2</sup>, published in April 2015, presents a masterplanning toolkit, specific to town centres, which includes guidance focusing on the development of quality, accessible public realm and the use of town assets. The toolkit gives three clear goals for a town: to be attractive; active; and accessible, and was studied before and throughout the health check process.
- 2.3 **Why is the health of town centres important?** - *SPP* sets out how successful, sustainable places can be created and maintained in Scotland. It is vital for town centres in Aberdeenshire to be successful and viable in order to provide for their populations, and draw visitors. Town centres with a vibrant retail scene, a wide variety of services and attractive buildings & open space create economic growth, attract more people to the region, and promote a sense of well-being and identity.
- 2.4 **What value does completing regular Town Centre Health Checks provide?** - Health Checks contribute to the planning system's efforts to support successful town centres through giving an overview of their current performances. They provide an analysis of the infrastructure

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<sup>1</sup> Scottish Government, 2014. Scottish Planning Policy. Available at: <http://www.gov.scot/Resource/0045/00453827.pdf>

<sup>2</sup> Scotland's Towns Partnership, 2015. Town Centre Toolkit. Available at: [http://www.scotlandstowns.org/town\\_centre\\_toolkit](http://www.scotlandstowns.org/town_centre_toolkit)

and viability of the town centre which can be used to inform development plans and decisions on planning applications.

2.5 **Local Development Plan Policy** - The ‘Town centres and retailing’ supplementary guidance in the *2012 Aberdeenshire Local Development Plan*<sup>3</sup> requires development to either be situated in the town centre, or be shown to have only minor negative impact on the town centre. A sequential approach to selecting sites to develop on is promoted. Town centre health checks could be used to assess how much impact development may have on a town centre or whether it can be supported.

2.6 **Town centre health check history** - Aberdeenshire Council have completed one town centre health check every 2 years since 2003. Historically, indicators which towns have scored well on is ‘Quality of building’ and ‘Car Parking’. The indicators which towns have scored poorly on are ‘Provision of facilities for cyclists’ and ‘Availability of food shopping’. Banchory, Turriff, Inverurie and Stonehaven have often scored above average in past health checks. Below are the full final averages for the previous health checks. However, when comparing 2015 results with previous scores, it must be noted that the process for the 2015 Health Check is significantly different than the process used from 2003-2013, as outlined in Section 3 - Methodology.

	Banchory	Banff	Ellon	Fraserburgh	Huntly	Inverurie	Peterhead	Stonehaven	Turriff
2013	3.5	2.8	3.1	2.7	3.0	3.5	3.0	3.4	3.4
2011	3.7	2.9	3.1	2.5	2.8	3.7	3.0	3.6	3.7
2009	3.7	2.7	3.2	2.5	3.0	3.7	3.6	3.5	3.2
2007	4.0	2.6	3.1	2.4	2.8	3.5	3.2	3.4	3.2
2005	3.2	2.4	3.0	2.4	2.5	3.6	2.8	2.9	2.8
2003	3.5	2.5	3.0	2.4	2.5	3.5	2.9	3.0	2.9

Above: Table of previous health check scores.

<sup>3</sup> Aberdeenshire Council, 2012. Local Development Plan. Available at: [https://www.aberdeenshire.gov.uk/planning/plans\\_policies/plan.asp](https://www.aberdeenshire.gov.uk/planning/plans_policies/plan.asp)

### 3. Methodology

- 3.1 As with previous health checks, the methodology was largely based on the document *Assessing the impact of retail developments in Aberdeenshire* (Dec 2004)<sup>4</sup> which provides details of a method for completing health checks. However, with the publication of SPP and the Town Centre Toolkit several adaptations were made to the process and the design of the finished report.
- 3.2 The towns included in the 2015 health check were Banchory, Banff, Ellon, Fraserburgh, Huntly, Inverurie, Macduff, Peterhead, Portlethen, Stonehaven, Turriff and Westhill. While the others had been studied previously, Macduff, Portlethen and Westhill were new additions to this year's report. Elected members had recognized the value of the Town Centre Health Checks and suggested that added value could be obtained by expanding the study to include these towns. The town centre boundary used for each town was as identified in the 2012 Local Development Plan and Proposed Local Development Plan 2016. All of the twelve towns have a population over 4,000 people and have a defined town centre.
- 3.3 Each town centre was scored between 1 and 5 against 25 different health indicators. The indicators were restructured from previous health checks in an attempt to follow *SPP* guidance and acknowledge the *Town Centre Toolkit*. A score of 0 or 1 constitutes a poor performance, whereas a score of 5 constitutes an excellent performance. A score of 2 or 3 is to be thought a reasonable result. The final table of scores can be found in appendix 1, and a guide to the scoring of indicators can be found in appendix 3. The use of a six point scale discourages an average score; scores must be either better or worse than a median.
- 3.4 Site visits were the principal way of gathering information used to score the indicators. These were carried out by two, or sometimes three, members of staff in each of the town centres. As several indicators were to be scored through only observation and site visit experience, staff were instructed to be mindful to give carefully considered scores with clear justification for each indicator. The site visits were also used to help guide scores for other indicators, carry out pedestrian counts, and note the name and use of each shop in the town centre in order to develop a database of this information. For the first time site visits were also used to inform an observational map of each town

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<sup>4</sup> Aberdeenshire Council, 2004. *Assessing the Impact of Retail Developments in Aberdeenshire*.  
[https://www.aberdeenshire.gov.uk/planning/plans\\_policies/2004\\_1retailimpact.PDF](https://www.aberdeenshire.gov.uk/planning/plans_policies/2004_1retailimpact.PDF)

centre showing the town centres strengths, weaknesses and opportunities. Desk work was also undertaken in order to score several of the indicators from published information sources and produce informative maps, graphs and analysis.

3.5 A town centre health check is a comparative study of town centre environments. In order for effective comparisons to be made, all town centres had to be scored on a relative basis. The populations of the town were used as a context in which to score indicators. Towns with different populations who recorded a similar level of health on certain indicators may receive different scores. For example, if Peterhead and Banff town centres were both found to sustain an average number and range of professional services in relation to other Aberdeenshire town centres, it would be impressive for Banff because of its below average population (4,020), but poor for Peterhead because of its above average population (18,450). Therefore, Banff would receive a higher score than Peterhead for the indicator 'Presence of Professional Services'. The populations were taken from the most recent available data on Aberdeenshire Council<sup>5</sup>, and can be found in Appendix 3.

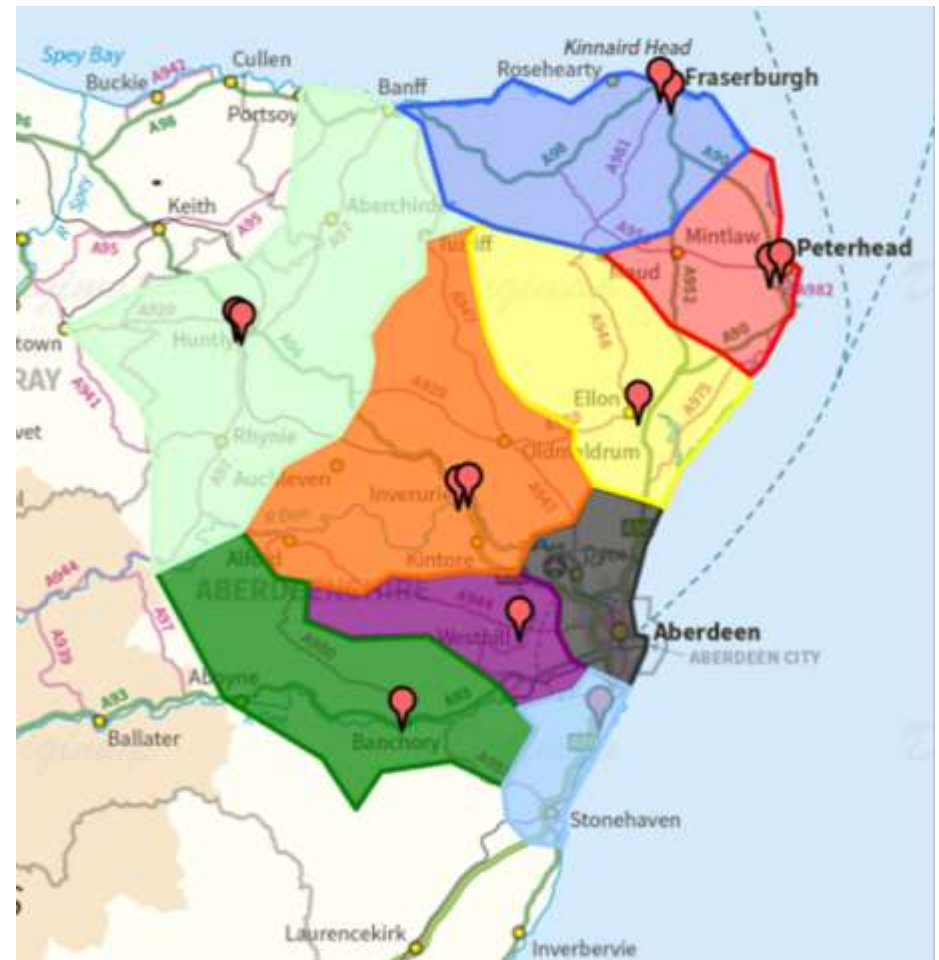
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<sup>5</sup> Aberdeenshire Council, 2012. Aberdeenshire Settlement Populations. Available at <https://www.aberdeenshire.gov.uk/statistics/population/AberdeenshireSettlementsPopulation2012.pdf>

## 4. Baseline Retail Assessment

4.1 **Supermarkets in Aberdeenshire** - There are 12 major supermarkets (>4500m<sup>2</sup>) in Aberdeenshire, with 2 each in Inverurie, Peterhead, Fraserburgh and Huntly, and 1 each in Banchory, Portlethen, Westhill, and Ellon. Aberdeenshire's population is 257,740 which gives a ratio of 21,478 people per supermarket. This figure cannot be taken to mean that exactly 21,478 shop at every supermarket because of several factors. These include: that neither the supermarkets or population are spread out evenly across the region, that supermarkets on the outskirts of Aberdeen and at Keith may serve some of Aberdeenshire's population, and that some people may shop closer to their work instead of their homes.

4.2 Shown right is a map with each of Aberdeenshire's major supermarkets. The map has been coloured so that the potential catchment area for each supermarket is highlighted. It should be noted that the areas do not purport to be completely accurate - they are simply estimates based on drive times. Furthermore, it is unlikely that some of the areas are as large in reality – there may be gaps between them where people use smaller supermarkets and convenience stores (possibly where the 4 areas meet around Cuminestown, for example). Estimated populations of each of the areas show that, generally, there are around 20-25,000 people per area with one supermarket, and 30-40,000 per area with two supermarkets.



Map of Aberdeenshire with potential catchment areas of major supermarkets highlighted. The map was produced using [www.digimap.edina.ac.uk/](http://www.digimap.edina.ac.uk/)



- 4.3 **Supermarket Impacts and consequences** - The presence of supermarkets and convenience stores has been increasing for several decades and Tesco, Asda, Morrisons and Sainsbury's are the 4 largest shopping chains in the UK, consuming 73.8% of the market.<sup>6</sup> All Aberdeenshire's major supermarkets are owned by Tesco, Asda or Morrisons. The extent to which they are providing their areas with a variety of resources and also diverting trade from town centres and the high street is reflected in the layout of some of the stores. As well as the main bulk of the products, bakeries, butchers, fruit & veg stalls and fishmongers can often be included, mimicking the shops in a typical high street of the past. Large chains are also opening an increasing number of small convenience stores in recent times; there are especially a growing presence of 'Tesco Express' and 'Sainsbury's Local' stores.<sup>7</sup>
- 4.4 The number of supermarkets and multiple retailers in a town generally directly affect town centres, and there must be an appropriate ratio of people per supermarket in an area to serve the population. If there is under trading (where one or more supermarkets are not performing at capacity and the catchment area would function adequately even without one of the supermarkets) resulting in low supermarket turnover, they may not be busy enough to justify the negative effect they would have on the high streets and on distinctive independent retailers. Independent retailers may be forced out of business causing properties to become vacant, and streets and squares to become quieter. Multiple retailers would not ensure that money spent is kept in the town, leaving it worse off than before. Other, smaller types of shop may attempt to open branches near supermarkets given their popularity – if this occurs outside of a town centre it would have a huge impact. Therefore, careful planning is needed to regulate retail around towns. It is possible that the nearest case to under trading in Aberdeenshire is in Huntly, which is the smallest town with two major supermarkets. Although they also provide for an extensive rural area around Huntly, it is likely this is a reason for the high vacancy rate in the town.
- 4.5 If there were too few supermarkets, however, overtrading will occur - where a supermarket is serving enough people that it would be beneficial and profitable to upgrade their store or to build a new store within the catchment area. In this situation, fewer people may be located near one, and may find it an issue easily locating the variety of food needed for a healthy lifestyle. Indeed, an American study found that the presence of enough supermarkets in an area reduced the prevalence of overweight and obese residents.<sup>8</sup> From the data

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<sup>6</sup> The Guardian. 2015. Available at: <http://www.theguardian.com/business/2015/apr/08/aldi-overtakes-waitrose-to-become-uks-sixth-largest-supermarket-chain>

<sup>7</sup> BBC News. 2014. Available at: <http://www.bbc.co.uk/news/magazine-25762466>

<sup>8</sup> The American Journal of Preventative Medicine. 2006. Available at: [http://www.ajpmonline.org/article/S0749-3797\(05\)00483-6/fulltext](http://www.ajpmonline.org/article/S0749-3797(05)00483-6/fulltext)

used, it is possible the nearest case to this in Aberdeenshire is the major supermarket in Portlethen which serves both Portlethen and Stonehaven, and the surrounding rural area.

4.6 **Multiple Retailers in Aberdeenshire town centres** - There are a substantial percentage of multiple retailers and services in Aberdeenshire. These are far more likely to be nationally multiple than locally multiple. The most popular uses are all national banks and the most popular retail use is The Co-operative. Multiple outlets which are local to Aberdeenshire include J G Ross bakers and Charles Michies' pharmacies however there are very few others.

4.7 **Aberdeenshire and Aberdeen City** – Although town centres in Aberdeenshire generally provide an attractive, vibrant retail space, Aberdeenshire residents are also vital to the health of Aberdeen City. The offer of retail and restaurants in Union Square, high level sports teams and facilities, an amusement park, and Aberdeen's variety of nightlife among other facilities attract large numbers of people every day from Aberdeenshire looking for something different. Thousands commute from Aberdeenshire – primarily including residents in Portlethen, Stonehaven, Westhill, Banchory, Ellon and Inverurie and the surrounding rural area. Residents in these areas are close enough to able to work in Aberdeen and as well as visit for leisure, giving a continuing challenge to their town centres to be able to compete for footfall and to also attract those from the city looking to visit the countryside. Fewer commute from Huntly, Turriff, Peterhead, Banff, Macduff, Fraserburgh and the surrounding areas as the journey to the city takes rather longer. This gives them the advantage of locals looking to their own town centres to shop more often – each of them also have distinctive rural or coastal surroundings to attract visitors. However, their isolation from the City may eventually restrict the growth of their retail capacities.

4.8 The Aberdeen City and Aberdeenshire Retail Study 2013 carried out extensive research into retail in the North East. One key conclusion from the study was that the retail market will be concentrated further in the largest centres, and in “smaller traditional town centres the long term retail potential is expected to be limited”.<sup>9</sup> It is critical, therefore, for town centres to grow with a clear vision, embracing its own location, surroundings, and strengths. As the study confirms, in order to compete with the City, and with competition from out-of-town supermarkets and the ever-growing E-commerce industry, businesses in towns must provide a high level of retail that generates customer loyalty, a very attractive shopping environment or engage certain groups of consumers effectively. There are an extremely wide variety of

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<sup>9</sup> The Aberdeen City & Shire SDP Authority, 2013. Aberdeen City and Aberdeenshire Retail Study 2013. See p5 of the Executive Summary. Available at: <http://www.aberdeencity.gov.uk/nmsruntime/saveasdialog.asp?IID=54160&SID=24188>

towns – some with attractive harbours or beaches, some located in deep rural settings, some with huge links to the oil & gas industry, some in ideal commuting locations - and all can be successful in their own way.

- 4.9 **Peterhead and Fraserburgh** - Peterhead and Fraserburgh town centres are the primary retail centres in the north of Aberdeenshire and provide for a large number of people in the area. Peterhead has the largest number of shops in Aberdeenshire – multiple retailers have appeared to cluster around each other in Peterhead town centre far more than in Fraserburgh. Fraserburgh town centre only has half the multiple retailers of Peterhead and far less shops in total, yet more independent shops. This could lead to the reason of why Fraserburgh scores lower than Peterhead overall and sees less footfall – showing that multiple retailers are very important to a town centre’s attractiveness. It has been noted that during the weekends, Peterhead residents flock down to Aberdeen for a wider selection of retail and services.
- 4.10 **Banff and Macduff** - Banff and Macduff also have a unique retail relationship. The towns are almost identical in population and sit together on the north coast, only divided by Banff Bay. However, Banff have a ratio of 1 shop per 39 residents, whereas Macduff has 1 shop for every 83 people. The contrasting high and low scores cancel each other out as Banff shops receive custom from both Banff and Macduff residents. Banff is the retail centre for Macduff.
- 4.11 **Aberdeenshire retail types** – ‘Restaurants, cafes and hot food’, ‘Hairdressing, beauty and health’ and ‘Banks and Finance’ have been the three most popular retail or service uses in Aberdeenshire for several years. The same is true of every individual town in Aberdeenshire except Peterhead and Stonehaven which have more convenience stores than other towns. Conversely, shop types which are underrepresented in Aberdeenshire are ‘Department and Catalogue stores’, ‘Menswear’, and ‘Greengrocers and Fishmongers’. Portlethen has the smallest range in shop types, whereas Inverurie is the only town to have the full range of shop types.

## 5. Overview of Results

This table provides an overview of the results which are detailed later in the document. The table shows the two towns with the highest scores in the overall category as well as the two towns with the lowest scores and outlines what the differences were between the high and low scoring towns. It should be noted that the overall categories are made up of more than one individual indicator leading to an average score.

	<b>Retail</b>	<b>Activity</b>	<b>Physical Environment</b>	<b>Property</b>	<b>Accessibility</b>	<b>Community</b>
<b>Which towns scored highest?</b>	Inverurie and Stonehaven	Turriff and Inverurie	Turriff and Macduff	Inverurie, Banchory, Stonehaven and Westhill	Westhill and Banff	Westhill
<b>Which towns scored lowest?</b>	Portlethen and Macduff	Portlethen and Westhill	Stonehaven and Portlethen	Banff and Macduff	Macduff and Stonehaven	Fraserburgh and Peterhead
<b>What were the main reasons for different scores across the town centres?</b>	Inverurie and Stonehaven have a broad range of good quality comparison and convenience retail and professional services, and a mix of multiple and independent retailers. Macduff and Portlethen have few occupied retail units meaning residents have to go elsewhere for an adequate choice of shops.	Turriff and Inverurie have appropriate cultural, community and visitor facilities and ample restaurants and cafes. Portlethen and Westhill have minimal visitor or cultural facilities to make the town centre attractive to visit.	Turriff town centre has pleasant open and green space and attractive sandstone buildings. Macduff's seafront and architecture is attractive. Stonehaven and Portlethen have a lack of open and green space and few notable buildings.	The towns scoring the highest scores are those which are in close proximity to Aberdeen City Centre which are therefore more attractive to developers. Banff and Macduff are more remote and have a higher rate of vacant units.	Banff recorded good pedestrian footfall and Westhill has useful cycle facilities, and streets and traffic are easy and comfortable to navigate in both towns. Macduff has very little footfall while Stonehaven has traffic issues and neither have cycle facilities.	The crime rates are very low in Westhill compared to the towns of Fraserburgh and Peterhead. This also contributes to the lower scores for the community perceptions in relation to Fraserburgh and Peterhead.

## 6. Analysis of Results

- 6.1 An analysis of the 2015 Town Centre Health Check results are presented below. In the case of each town centre, a brief outline is given as to their background and current situation along with 4 photos of their streets or landmarks. To help write the background, the website *Understanding Scottish Places (USP)*<sup>10</sup> was studied. The site, run by Scotland's Towns Partnership, allows users access to a wide range of information on every town in Scotland including how independent they are, and their population, employment, public service, commercial and social demographics. A SWOT type analysis of the town's results follows before an observational map of the town centre is presented detailing the retail types of each of its outlets and highlighting strengths, weaknesses and opportunities. Each town's retail offer and their overall shopping experience is then reviewed, before some of the main findings from surveys carried out on town centres are detailed. Finally, pedestrian count results are discussed and the total scores are given.
- 6.2 Despite the review of the number and structure of indicators from the previous health checks any alteration in the average scores for a town centre can still be used to suggest overall changes to the well-being of individual town centres.
- 6.3 Despite the consistent fashion in which procedures have been undertaken for each of the health check studies, it should be acknowledged that several scores represent qualitative evaluations. However, none of the indicators evaluated on site visits are scored by a single individual - a common score was agreed between the researchers. Many of the indicators are scored on the basis of quantitative data and in an easily repeatable manner. A broad comparison has been made between the results collated from previous studies, rather than an in-depth mathematical comparison between different scores.

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<sup>10</sup> Scotland's Towns Partnership, 2015. Understanding Scottish Places. Available at: <http://www.usp.scot/>

## 7. Summary of Residents' Views, Perceptions & Aspirations of Town Centres.

7.1 The Aberdeenshire Citizens' Panel was first established by the Aberdeenshire Community Planning Partnership (ACPP) in 2003 with a total membership of 1,245, spread across the six administrative areas of Aberdeenshire (Banff & Buchan, Buchan, Formartine, Garioch, Kincardine & Mearns and Marr). IBP Strategy and Research undertook fieldwork for this survey in August and September 2015. The survey was issued to the full membership of the Panel 805 response received, which equals a response rate of 67%.

7.2 Respondents use a very diverse set of town centres across (and beyond) Aberdeenshire, with those most commonly used being Inverurie (23% use at least weekly) and Aberdeen (20%). It should also be noted however, that although Inverurie is the most commonly used all of the town centres identified in the study are visited daily albeit to a lesser extent.

Town	Daily	2-3 time per week	Weekly	2-3 times per month	Monthly	Less often	Never use	Base
Aberdeen	3%	5%	12%	20%	20%	37%	3%	776
Banchory	1%	3%	4%	4%	3%	32%	53%	740
Banff	2%	2%	2%	2%	3%	20%	69%	744
Elgin	<1%	<1%	<1%	3%	5%	24%	68%	740
Ellon	1%	4%	3%	3%	3%	20%	65%	744
Fraserburgh	1%	4%	4%	3%	4%	16%	68%	742
Huntly	1%	2%	2%	2%	4%	20%	69%	735
Inverurie	6%	8%	9%	8%	12%	31%	26%	759
Macduff	1%	1%	1%	2%	2%	10%	83%	735
Montrose	1%	1%	2%	2%	2%	11%	82%	737
Peterhead	2%	3%	4%	3%	4%	16%	68%	751
Portlethen	2%	2%	4%	2%	3%	10%	77%	745
Stonehaven	3%	3%	2%	3%	5%	21%	62%	749
Turriff	1%	2%	3%	1%	3%	21%	68%	746
Westhill	2%	4%	4%	4%	8%	22%	55%	740

Extract from IBP Report - Figure 3.1 Frequency of Visiting Town Centres

7.3 Respondents were then asked to select the town centre that they used most often where unsurprisingly Inverurie was top with 22% of respondents surveyed selecting the town. It was however surprising to note that Fraserburgh and Peterhead were in the top three of the towns used most often even though they scored lower on the previous table. Focusing on the town centre that respondents use most often, the majority of respondents use their preferred town centre at least weekly for 'top-up' grocery shopping (59%) and their main grocery shopping (57%). This is followed to a significantly lesser extent by use of local private sector services (24%), eating and drinking (15%) and leisure and culture (15%). The percentage of respondents using the town centre for their main grocery shopping could help to explain the reason for towns appearing on the most used town centres.

7.4 With regards to changes in frequency of visits, 22% of people say that, over the last couple of years, they use their town centre less often compared to 17% that say they use it more often and 61% of people reporting no change. However, this overall figure masks some significant distinctions at a very local level. For example, people are more likely to say that they use each of Westhill and Stonehaven more often than previously. However, they are very likely to say that they use each of Peterhead and Fraserburgh less often than previously. Overall, when people say they use a particular town centre more often than previously this tends to be driven by a mixture of convenience factors and improvements to the town centre, as well as by changes in individuals' personal circumstances. When people say they use a particular town centre less often the main factors (other than personal circumstances) relate to the town centre environment, range of shops and services and competition from elsewhere (including online).

Town	Use it more	Use it about the same	Use it less	Base
Westhill	33%	63%	4%	51
Ballater	30%	70%	0%	10
Stonehaven	29%	59%	12%	49
Inverurie	23%	61%	16%	169
Montrose	22%	56%	22%	18
Aboyne	21%	64%	14%	14
Aberdeen	19%	52%	30%	27
Ellon	18%	65%	16%	55
Banff	14%	61%	25%	36
Huntly	14%	55%	31%	29
Peterhead	10%	46%	43%	69
Banchory	4%	79%	18%	57
Fraserburgh	4%	53%	43%	68
Turriff	3%	87%	10%	30
Portlethen	3%	82%	15%	33
Alford	0%	77%	23%	13

Extract from IBP Report - Figure 3.4 Change in use of Town Centre by location.

7.5 Respondents were then asked to explain the reasons for using their preferred town centre more/less often than previously. The key themes which can be taken from the questionnaire as to why people are using a particular town centre, except for personal circumstances are improvements to the town centres and convenience (77% of respondents ranked this factor in top 3). This is followed to a lesser extent by the use of a specific shop or service (44% rank in their top three reasons) and a desire to shop locally (40% rank in their top three). Factors such as environment of the local town centre, public transport links, safe environment and atmosphere are substantially less likely to be ranked in respondents' top three reasons for actually using a particular town centre. The key issues which were raised in relation to why respondents use their preferred town centre less often were the preference to shop online, lack of variety of shops/ shop closures, facilities being located and general town centres issues including parking, appearance and safety.



7.6 Respondents were also asked to rate their preferred town centre against a variety of factors which are detailed below which shows Turriff, Stonehaven and Inverurie scoring highly on most aspects whereas Peterhead, Fraserburgh and Portlethen scored less than 50% on several different aspects.

Town	Atmosphere	Environment of the town centre	Cleanliness	Access by public transport	Access by car	Ease of walking about the town centre	Parking	Personal safety	Bases
Aberdeen	42%	42%	30%	65%	62%	81%	35%	73%	24-27
Aboyne	57%	57%	69%	50%	86%	86%	64%	86%	10-14
Alford	58%	50%	100%	27%	100%	100%	83%	100%	11-13
Ballater	80%	80%	90%	83%	89%	100%	80%	100%	6-10
Banchory	71%	69%	89%	59%	84%	93%	64%	95%	48-56
Banff	51%	46%	64%	65%	77%	78%	57%	86%	26-37
Ellon	64%	78%	89%	48%	88%	89%	59%	96%	48-56
Fraserburgh	28%	21%	28%	64%	66%	78%	43%	51%	55-69
Huntly	50%	48%	63%	50%	96%	72%	71%	86%	24-28
Inverurie	79%	79%	81%	65%	76%	89%	55%	91%	140-168
Montrose	67%	72%	72%	67%	100%	94%	83%	83%	15-18
Peterhead	18%	22%	28%	67%	65%	81%	62%	60%	57-68
Portlethen	24%	24%	57%	55%	94%	45%	94%	80%	29-32
Stonehaven	83%	67%	57%	65%	72%	85%	53%	91%	40-48
Turriff	76%	76%	79%	59%	86%	93%	72%	100%	22-29
Westhill	60%	67%	80%	72%	98%	90%	92%	94%	43-52
<b>Overall</b>	<b>59%</b>	<b>59%</b>	<b>66%</b>	<b>61%</b>	<b>80%</b>	<b>84%</b>	<b>62%</b>	<b>84%</b>	<b>652-772</b>

Extract from IBP Report - Figure 3.7 Rating of Town Centre by Location.

7.7 When asked to suggest additional shops, services or facilities that would encourage them to use their town centre more often, no single category of outlet is predominant. The most common retail suggestions relate to clothing and supermarkets, whilst reference is also commonly made to places to eat out and to a broad range of leisure facilities. The most common factors that would most encourage respondents to make use of town centres more often include a better range of shops and services (78% say this would make them use their town centre a bit more or a lot more often), followed to a lesser extent by fewer empty shops (59%), a better range of places to eat and drink (55%), better availability of car parking (54%), lower cost of car parking (54%) and improved cleanliness (50%).

## 8. Banchory

### 8.1. Banchory Context

Banchory lies on the north bank of the River Dee, 19 miles west of Aberdeen. The town is growing rapidly with new housing in the 'Hill of Banchory' developments, supported by a new supermarket, and is visited often by those attracted to its walking, cycling, and fishing opportunities, and its scenic surroundings in Royal Deeside. A significant number of workers in its 7,520 population commute to Aberdeen. According to USP, Banchory is a fairly independent town with a prevalence of higher incomes and private housing. There is a large percentage of workers in professional jobs and in the retail and property industries compared to other towns in Aberdeenshire. There is also high educational attainment and low levels of deprivation.



### 8.2. Banchory Final Scores

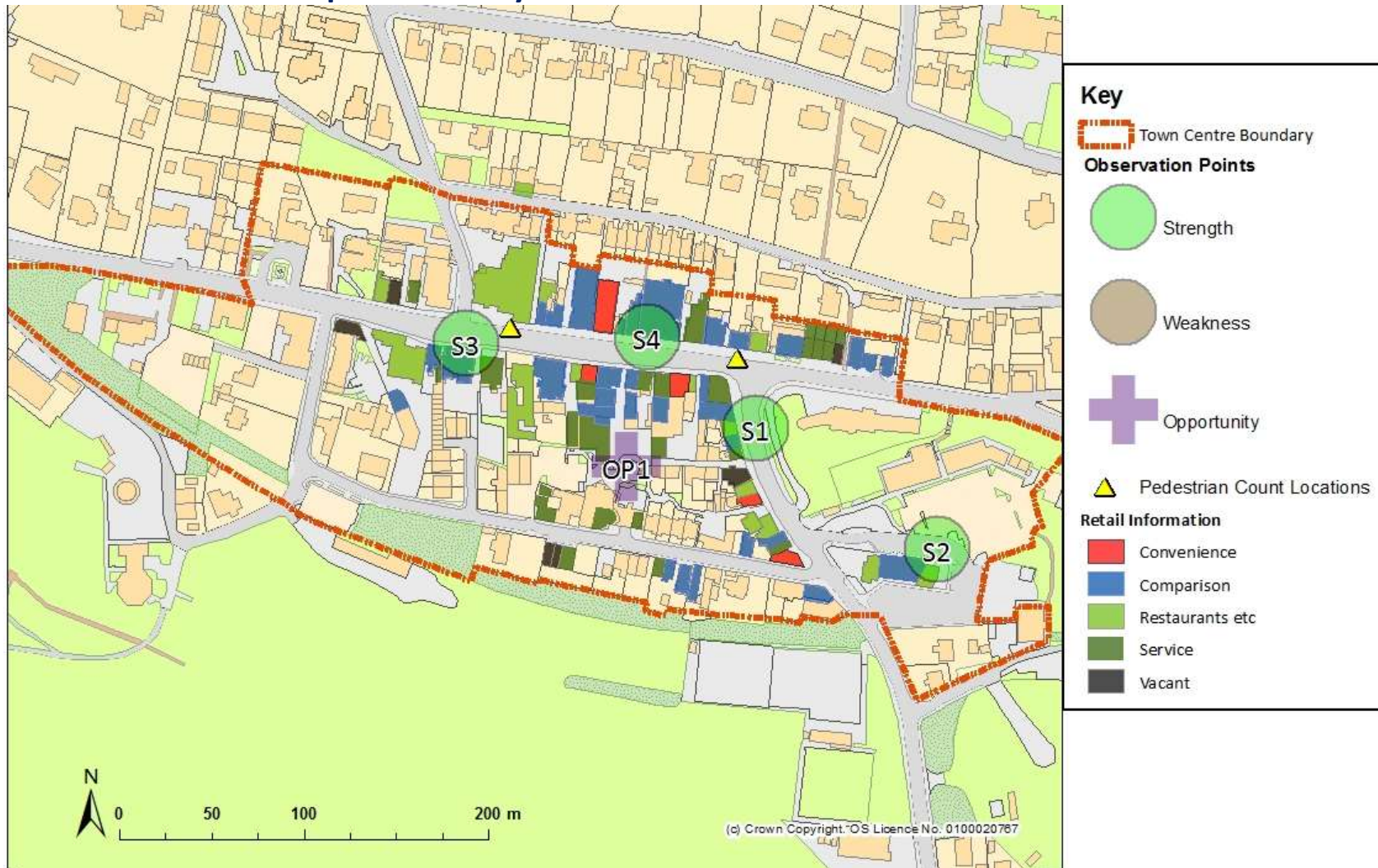
Retail	Activity	Physical Environment	Property	Accessibility	Community	Total
19/35	11/15	12/20	11/15	19/30	8/10	80/140

See Banchory's full scores in Appendix 1: Indicator table.

### 8.3. Banchory Town Centre Health Check Results

<p><b><u>Strengths</u></b></p> <ol style="list-style-type: none"> <li>1. Dee Street is edged by attractive trees and bushes beside Bellfield Care Home and gives enjoyable views of the surrounding countryside.</li> <li>2. Bellfield car park is in a convenient location and often busy.</li> <li>3. The Stag, The Douglas Arms, and the Burnett Arms on the west of High Street are an attractive cluster of restaurants with bars which are busy at evenings and weekends.</li> <li>4. Shops and services included Subway, W H Smith, banks and cafes generate footfall on the High Street.</li> <li>5. There are relatively good facilities for cyclists such as boxes marked on the road at the Dee Street junction, bike racks and wide roads.</li> <li>6. Shops are generally well maintained and there are very few vacancies or derelict units.</li> <li>7. Bridge Street and High Street are connected by several roads and paths including through Scott Skinner Square and by Dee Street.</li> <li>8. Although not present on the day of the site visit Banchory has a very successful farmers market.</li> </ol>	<p><b><u>Weaknesses</u></b></p> <ol style="list-style-type: none"> <li>1. The 201 bus route passes through the town centre however it can be unreliable, and has a long journey time to Aberdeen.</li> <li>2. There is a smaller number and more narrow mix of professional services than in other centres.</li> <li>3. There is a relatively small number of retail uses and food shopping with no butcher, greengrocer or fishmonger in the town centre.</li> </ol>
<p><b><u>Opportunities</u></b></p> <ol style="list-style-type: none"> <li>1. At the time of completion of the health check Scott Skinner Square was being redeveloped which will lead to a more modern, attractive town square.</li> <li>2. Restaurants, cafes and takeaways can thrive as the population increases.</li> <li>3. Banchory can continue to benefit from its excellent location in Royal Deeside.</li> </ol>	<p><b><u>Threats</u></b></p> <ol style="list-style-type: none"> <li>1. The main housing developments in Banchory at present are remote from the town centre and are provided for by the supermarket in the east of the town. It can be difficult to reconcile competing objectives for the town such as conservation of the landscape and urban expansion.</li> </ol>

## 8.4. Observational Map of Banchory



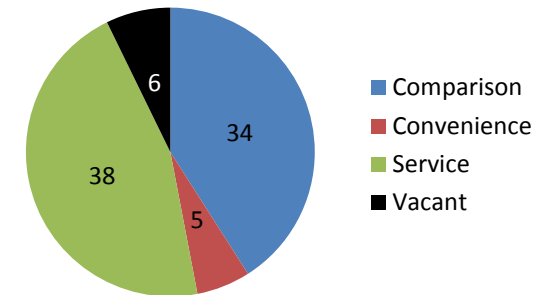
## 8.5. Banchory Retail Review

Banchory has a slightly smaller number of shops and services than might be expected considering the population the town centre serves. For this reason it is anticipated that several of the vacant properties will be occupied in the foreseeable future – there are none that appear run down or that have been vacant for an extended period of time. There is a relaxed feel to the retail centre in Banchory with views across the River Dee into thick woodland from Dee Street. The town centre is in a relatively compact area and is largely comprised of 2 main streets, keeping retailers close together - it is easy for pedestrians to visit many shops conveniently. The location of Bellfield car park ensures motorists also pass through Dee Street as they visit the town centre, where there are several food outlets including the popular Continental Cream sweet shop. Scott Skinner Square is a charming piece of open space home to some independent shops, an attractive beauty salon and Banchory library, and is currently being redeveloped.

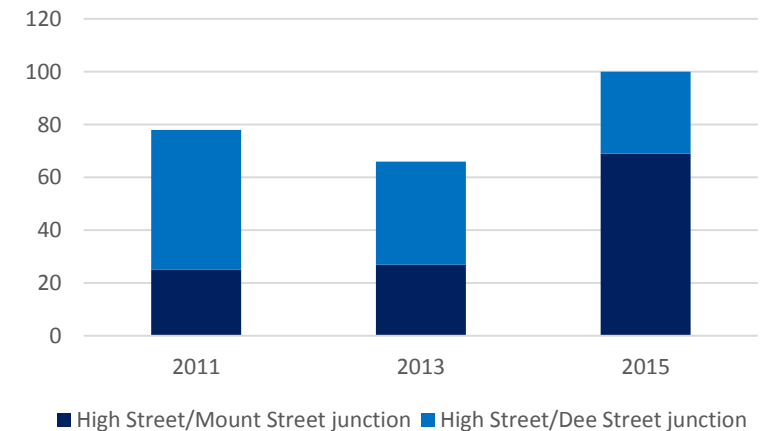
## 8.6. Banchory Pedestrian Count Analysis

Banchory recorded considerably improved pedestrian footfall from previous years. The count at the junction of High Street and Mount Street was particularly higher than usual. However, this may partly be accounted for by the reconstruction of Scott Skinner Square during the health check, meaning people are spending more time on the High Street at present. Nonetheless, the levels of footfall reflect well on Banchory and retailers on High Street.

**Banchory Retail Units**



**Banchory Average Pedestrian Counts**



## 9. Banff

### 9.1. Banff Context

Banff lies on the north coast of Aberdeenshire in Banff Bay. With a population of 4,020. Banff is an important administrative and service centre for northern Aberdeenshire, and is also an attractive tourist and visitor destination. The town shares resources with neighbouring Macduff. Historically, Banff had a thriving fishing port and benefited from its proximity to the river Deveron which is known for its salmon and trout. The townscape has been well preserved and has many historic buildings with parts of the former Banff Castle. USP shows that Banff is a fairly independent town especially with regard to schooling, and the number of jobs. A high percentage of the workforce are skilled labourers, or are in administration or education work.



### 9.2. Banff Final Scores

Retail	Activity	Physical Environment	Property	Accessibility	Community	Total
25/35	10/15	11/20	6/15	21/30	4/10	77/140

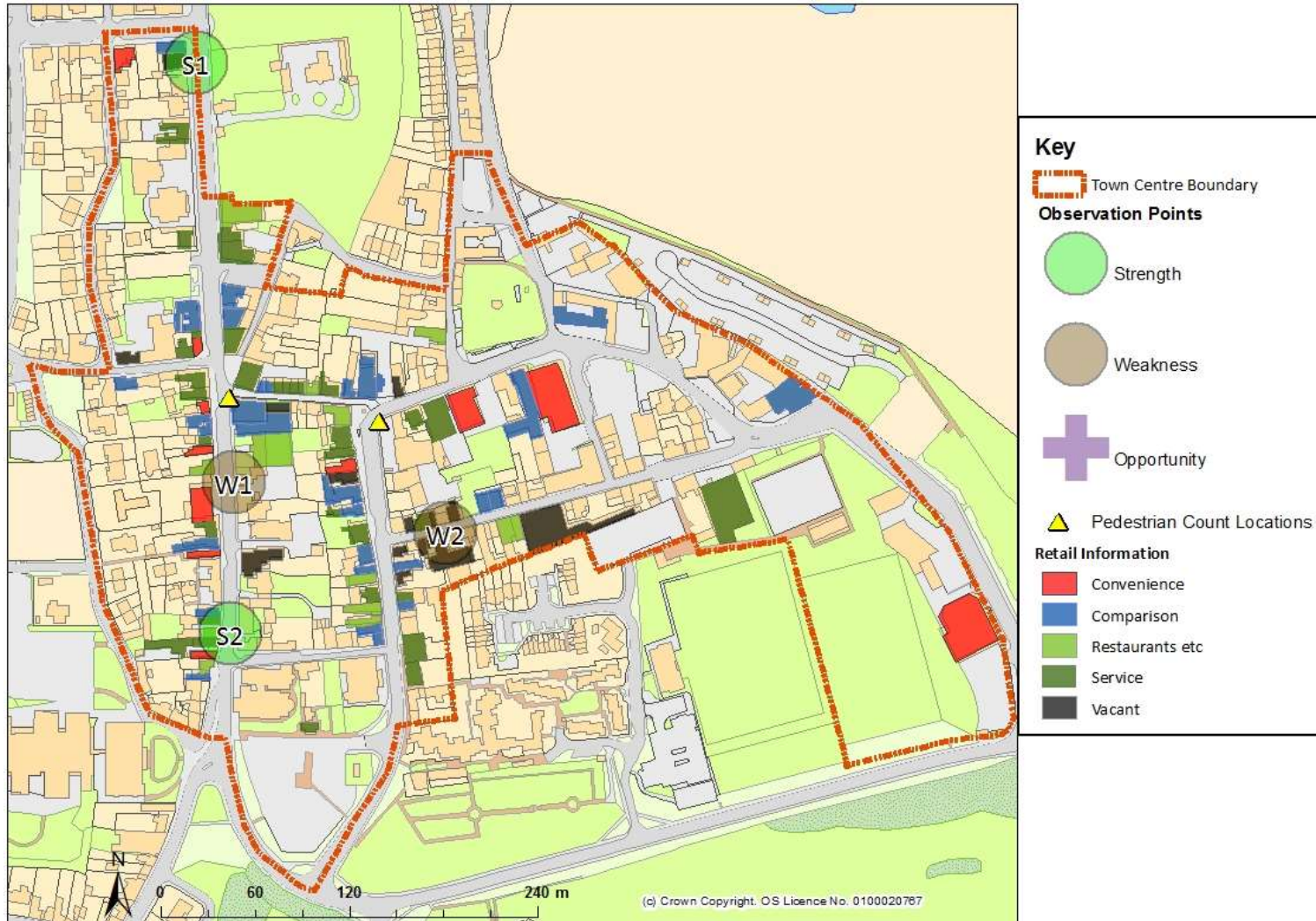
See Banff's full scores in Appendix 1: Indicator table.

### 9.3. Banff Town Centre Health Check Results

<p><b><u>Strengths</u></b></p> <ol style="list-style-type: none"> <li>1. The north of Castle Street has attractive buildings and trees.</li> <li>2. The library and museum sit together in a prominent location on the High Street.</li> <li>3. There is a wide range and large number of shops and services considering the town’s population.</li> <li>4. There is a healthy ratio of independent specialist shops.</li> <li>5. There are various different styles of buildings with a mix of materials, and several heritage signs.</li> <li>6. Alleys between streets and calm traffic ensure the town centre is permeable.</li> </ol>	<p><b><u>Weaknesses</u></b></p> <ol style="list-style-type: none"> <li>1. On High Street, there is a notable lack of quality architecture and active frontages in some of the buildings.</li> <li>2. The number of vacant units on Bridge Street have a negative effect on the town centre – Banff has the second highest number of vacant units among town centres studied.</li> <li>3. There is a steep gradient between Low Street and High Street which reduces ease of movement.</li> <li>4. There is a small amount green infrastructure within the town centre – however the castle grounds are just outwith the boundary.</li> <li>5. The town centre sees an excessively high number of crimes committed in relation to other, larger towns in Aberdeenshire.</li> </ol>
<p><b><u>Opportunities</u></b></p> <ol style="list-style-type: none"> <li>1. Retailers in Banff also serve the population of Macduff where there are fewer shops.</li> <li>2. If uses can be found for vacant units on Bridge Street this would provide a good link between the main part of the town centre and the seafront, Spotty Bag shop and Princess Royal Park.</li> </ol>	<p><b><u>Threats</u></b></p> <p>No threats were identified in Banff.</p>



## 9.4. Observational Map of Banff



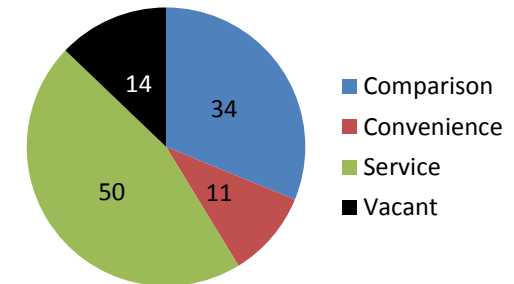
## 9.5. Banff Retail Review

Banff town centre has a variety of shops and services to serve its population. High Street, Strait Path and Low Street are the main shopping streets and most units on these streets are occupied. The Co-op attracts footfall to High Street where there is a mix of retail. Strait Path and Low Street host many of Banff's hot food outlets and professional services such as the Clydesdale Bank and Bank of Scotland. There are a range of independent specialist shops spread across the town including several furniture shops and chemists. If Banff could attract occupiers for vacant units on Bridge Street this would help to take action on one of the town's weaknesses. Despite being one of the smaller towns in the health check, Banff's sphere of influence extends to Macduff and the surrounding area which has a poorer selection of retail.

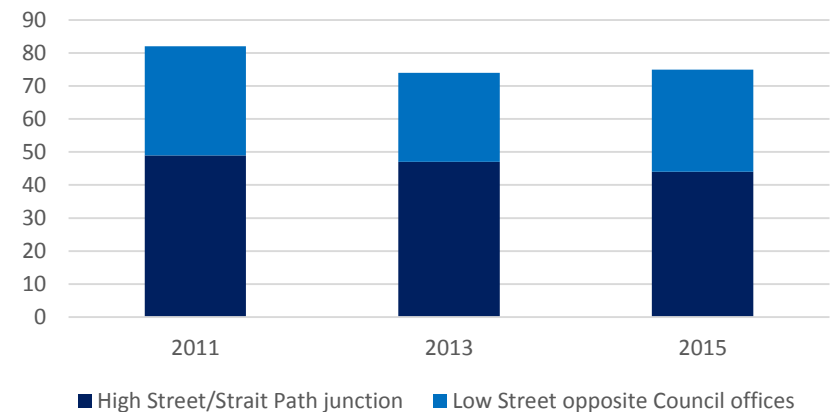
## 9.6. Banff Pedestrian Count Analysis

Banff's pedestrian count results have been the most consistent over the past 3 health checks. Although Banff doesn't have the highest total footfall, it does have one of the highest levels of footfall relative to its population which is a strong indicator of a healthy, attractive town centre. It is likely the consistently high results can be put down to visitors from Macduff and the surrounding area using the wider range of retail, facilities and particularly financial and professional services Banff has, as well as its coastal location and castle attracting those from further afield.

**Banff Retail Units**



**Banff Average Pedestrian Counts**



# 10. Ellon

## 10.1. Ellon Context

Ellon is a market town and major service centre situated within the Ythan river valley, 16 miles north of Aberdeen. The population, currently 10,100, has been growing rapidly with the oil industry and the town is part of the Energetica Corridor. Ellon can continue to expand in the near future through important housing and employment land allocations included at Cromleybank, and can become a high quality lifestyle, leisure and business location. USP indicates Ellon is a fairly independent town, has a wide diversity of jobs and has a high number of public sector jobs despite the significant percentage of workers who commute to Aberdeen.



## 10.2. Ellon Final Scores

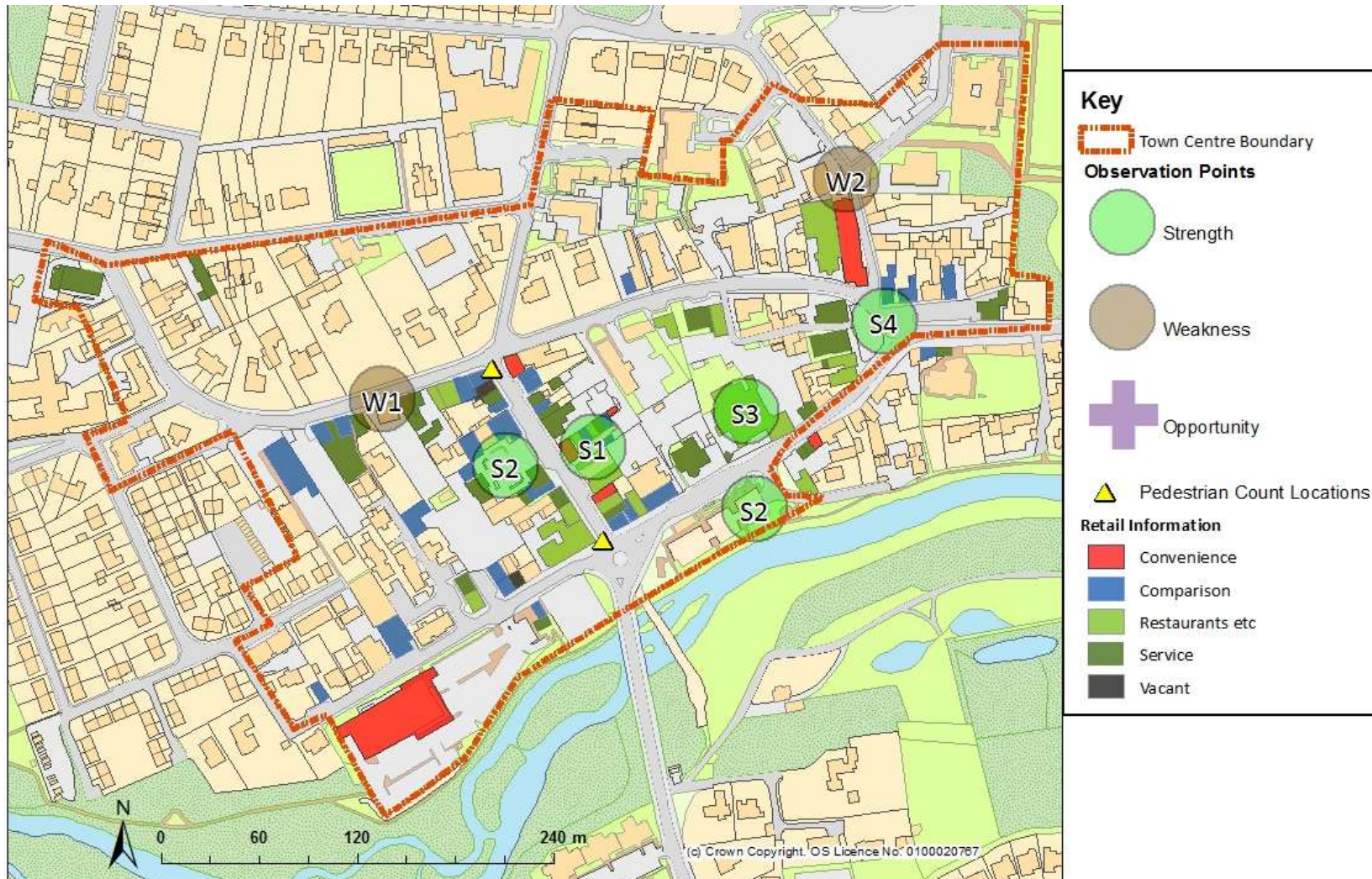
Retail	Activity	Physical Environment	Property	Accessibility	Community	Total
21/35	10/15	11/20	9/15	17/30	8/10	76/140

See Ellon’s full scores in Appendix 1: Indicator table.

### 10.3. Ellon Town Centre Health Check Results

<p><b><u>Strengths</u></b></p> <ol style="list-style-type: none"> <li>1. Although small, Ellon shopping centre provides a pleasant area away from traffic with a group of appealing shops.</li> <li>2. Green infrastructure includes several flowered areas including some at the square off Bridge Street and near the main bus stop along the river bank.</li> <li>3. The New Inn hotel stands out from other buildings in the town centre.</li> <li>4. The War Memorial at The Square is an attractive, meaningful piece of public art.</li> <li>5. Ellon has a good range of independent shops and professional services to provide for its population.</li> <li>6. There is a very low vacancy rate which shows retailers are in good health (although this does leave little room for new businesses).</li> <li>7. There is a wide range of cultural and community facilities such as the health centre, the Kirk centre, the library and the Ythan centre, with Victoria Hall on the town centre boundary.</li> <li>8. There are frequent bus services to Aberdeen from the pleasant main bus stop next to the river.</li> <li>9. There are few crimes committed in Ellon town centre relative to the town's population.</li> </ol>	<p><b><u>Weaknesses</u></b></p> <ol style="list-style-type: none"> <li>1. There is very little cycling infrastructure in Ellon. There are several narrow roads with Station Road considered to be not suitable for cyclists.</li> <li>2. Schoolhill Road is extremely narrow for pedestrians in places.</li> <li>3. There is a smaller than average range of multiple retailers in Ellon.</li> <li>4. There is also a smaller than average range of convenience outlets with no butcher or greengrocer.</li> <li>5. There is concerns regarding traffic on Bridge Street.</li> </ol>
<p><b><u>Opportunities</u></b></p> <ol style="list-style-type: none"> <li>1. Retailers could take advantage of a large planned housing development in Ellon which can potentially increase footfall.</li> <li>2. There is scope for more convenience or comparison outlets in Ellon if more units in the town centre can be made available for retail use.</li> </ol>	<p><b><u>Threats</u></b></p> <ol style="list-style-type: none"> <li>1. The supermarket to the east of the town attracts footfall away from the town centre.</li> <li>2. There is potential for further retail facilities to be developed also to the east of the town. These will offer different services to the town centre and so should not compete directly.</li> </ol>

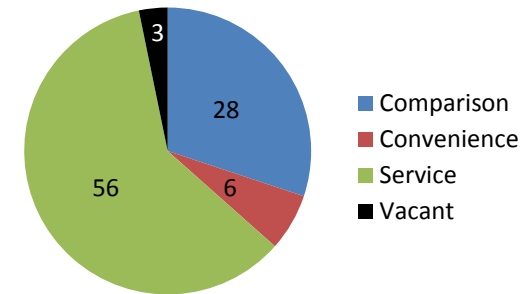
## 10.4. Observational map of Ellon



## 10.5 Ellon Retail Review

Ellon town centre has a good range of retail and gives a pleasant shopping experience. The main bus stop in Ellon is on Market Street which attracts footfall to its retail units including its professional services and food outlets including the charming Chocolate Bar and the New Inn. Bridge Street hosts a variety of retail and cafes and gives access to an attractive square and Ellon Shopping Centre. The main town square is at the east end of Market Street where Costcutter generates footfall. Indeed, Costcutter and Aldi are Ellon’s main convenience outlets and mitigate the impact of Tesco supermarket on the town centre. There is a high percentage of professional services within Ellon’s number of occupied units including banks, property services, a vet, a photography studio and a Sea Energy Ship Management office which attract a range of people to the town centre.

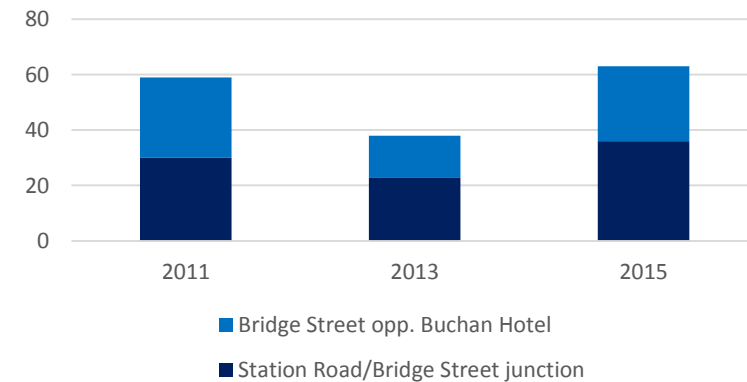
### Ellon Retail Units



## 10.6. Ellon Pedestrian Count Analysis

Ellon town centre recorded higher levels of footfall at both locations compared to the previous health checks. However, there still wasn’t as many pedestrians recorded as other similarly sized towns, despite the counts being taken on a Bank Holiday. A possible reason for this is that the lower than average number of convenience shops in the town centre mean that people look to the supermarket on the outskirts of Ellon for their groceries. In any case, Ellon town centre has a good retail scene overall.

### Ellon Average Pedestrian Counts



# 11. Fraserburgh

## 11.1. Fraserburgh Context

Fraserburgh is a major service centre of 13,140 people in the north east of Aberdeenshire. The town benefits from a busy commercial harbour and major fishing port. Attractions include a sandy beach, the Lighthouse Museum and heritage centre. The introduction of the ‘Super Saturdays’ scheme of monthly themed events has had a positive impact on retail in the town centre and a heritage lead regeneration scheme is undergoing preparation. The addition of a second major supermarket to the north west of the town hasn’t been found to have severely affected Fraserburgh’s scores in recent Health Checks. There are significant employment and housing allocations planned for Fraserburgh. USP indicates that Fraserburgh is one of three towns in Aberdeenshire which are highly independent. A high percentage of the workforce are skilled or semi-skilled manual workers and many of Fraserburgh’s jobs are in manufacturing and construction.



## 11.2. Fraserburgh Final Scores

Retail	Activity	Physical Environment	Property	Accessibility	Community	Total
22/35	7/15	8/20	7/15	15/30	3/10	61/140

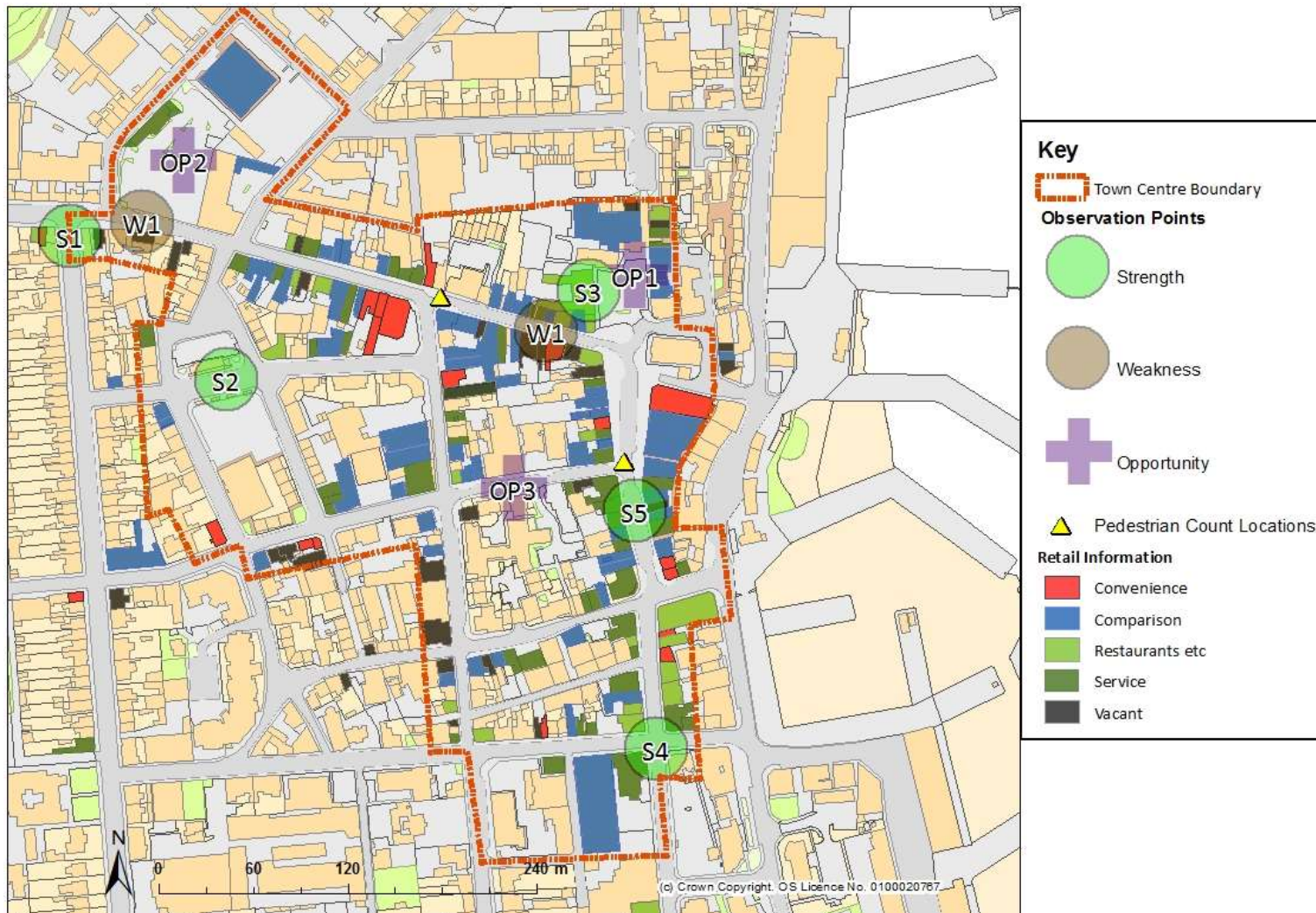
See Fraserburgh’s full scores in Appendix 1: Indicator table.

### 11.3. Fraserburgh Town Centre Health Check Results

<p><b><u>Strengths</u></b></p> <ol style="list-style-type: none"> <li>1. Charlotte Street has aesthetically pleasing buildings on either side with a pleasant view of West Parish Church.</li> <li>2. The bus station is modern and pleasant and there is a frequent town service.</li> <li>3. The Saltoun Arms Hotel, an impressive and well maintained building, and the Market Cross, which are both listed, sit attractively together.</li> <li>4. South Church provides an attractive view from Seaforth Street.</li> <li>5. Broad Street is pedestrian friendly and has a mix of shops.</li> <li>6. There is a wide variety of financial and professional services.</li> <li>7. There are more clothes shops than in any other town in Aberdeenshire.</li> </ol>	<p><b><u>Weaknesses</u></b></p> <ol style="list-style-type: none"> <li>1. There is a high vacancy rate - particularly on High Street, which has the largest number of vacancies in Aberdeenshire town centres.</li> <li>2. There is no incentive to cycle into the town centre.</li> <li>3. Fraserburgh town centre has a high crime rate and an especially high road traffic crime rate.</li> <li>4. Although there are attractive buildings in the town centre, many are poorly maintained and weeds have grown on several, giving an impression of decrepitude.</li> <li>5. There has been a decline in footfall when compared to previous TCHC results.</li> </ol>
<p><b><u>Opportunities</u></b></p> <ol style="list-style-type: none"> <li>1. Saltoun Square could house more plants, flowers or grass to become more attractive. Other streets would also benefit from more appealing green infrastructure. The square gives a link between the waterfront and the Lighthouse museum and Heritage Centre to the north of the town centre, and the main shopping streets so any improvement to this area would have a positive impact.</li> <li>2. The area adjacent to Denmark Street and High Street could be used constructively.</li> <li>3. Mid Street is relatively busy and has potential for further retail use.</li> <li>4. Fraserburgh has been given a Heritage Lottery Fund Grant to carry out a Heritage Lead Regeneration Scheme which could significantly improve various features of the town centre, including the restoration of the former Town Hall.</li> <li>5. Retailers would benefit from the same care being given to occupied and vacant buildings as there is in other towns to prevent them becoming rundown or derelict.</li> </ol>	<p><b><u>Threats</u></b></p> <ol style="list-style-type: none"> <li>1. Fraserburgh relies heavily on businesses such as Young's seafood and other fishing companies which have threatened to cut jobs, which in turn would impact on retail.</li> <li>2. Poorly maintained architecture may make it difficult to attract new occupiers into the town.</li> </ol>



## 11.4. Observational Map of Fraserburgh



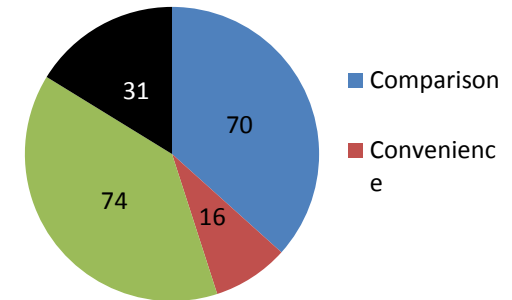
## 11.5. Fraserburgh Retail Review

Fraserburgh town centre has the second highest number of total occupied units and the highest number of vacant units in Aberdeenshire. The majority of these are on the two main shopping streets Broad Street and High Street with the others rather spread out. Broad Street houses a wide range of convenience, comparison, service and food outlets, with some green infrastructure at the Saltoun Square end of the street. High Street also has a mix of shops but is quieter and home to several vacant units. Fraserburgh gives a good choice of convenience outlets (especially bakeries), clothes shops, and has the most hair and beauty salons of any town centre in Aberdeenshire. Shops which generate high footfall include Farmfoods on High Street, and Boots on Broad Street however more people and therefore more retailers including multiples could be attracted to the town centre with an improved quality and upkeep of buildings, or beautification through provision of soft landscaping and plants.

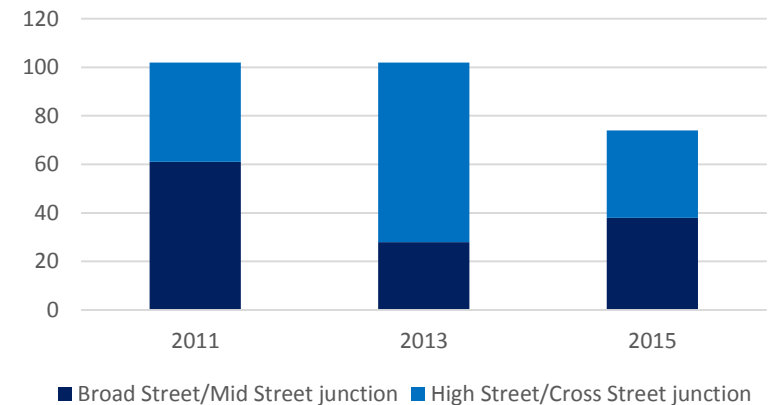
## 11.6. Fraserburgh Pedestrian Count Analysis

Fraserburgh's pedestrian count decreased significantly in 2015 from previous results, especially at the junction of High Street and Cross Street. The area has potential for high footfall because of the large number of units and its proximity to Saltoun Square, the bus station and the sea. However there are too many units vacant or rundown and Saltoun Square does not attract as many people as it could. Fraserburgh has the potential to attract far more pedestrians as it has done in previous years.

### Fraserburgh Retail Units



### Fraserburgh Average Pedestrian Counts



## 12. Huntly

### 12.1. Huntly Context

Huntly lies on the main Aberdeen to Inverness route, 38 miles northwest of Aberdeen. The town acts as a service centre for its 4,720 population and is one of the few towns in Aberdeenshire to be supported by two supermarkets. Lying in a Strategic Growth Area, there are possibilities for the town to expand significantly without detracting from Huntly’s traditional character. USP shows that Huntly is one of three highly independent towns in Aberdeenshire. There are a sufficient number of jobs and public services in the town and many residents do work in the town, although a significant number commute to Aberdeen.



### 12.2 Huntly Final Scores

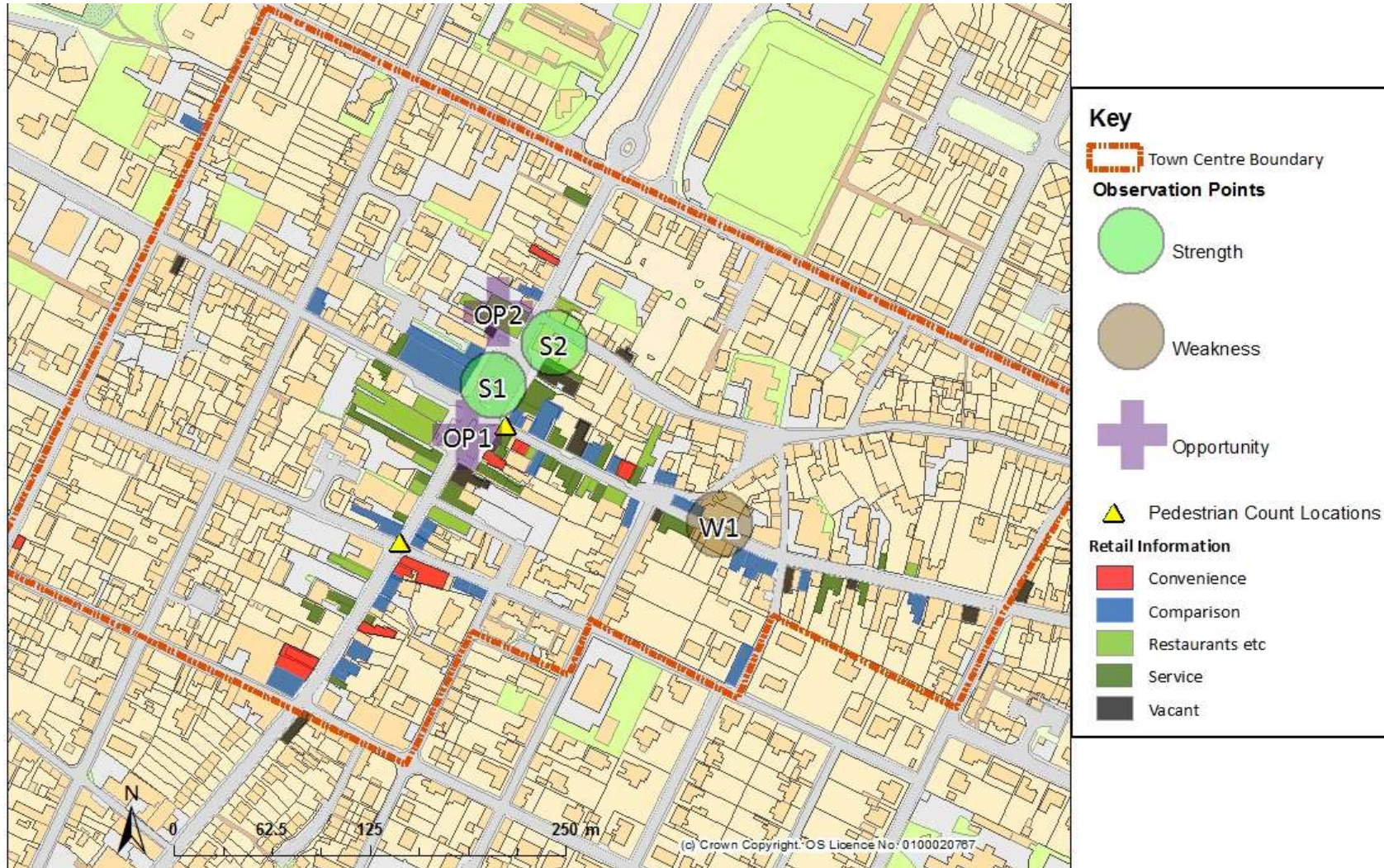
Retail	Activity	Physical Environment	Property	Accessibility	Community	Total
19/35	11/15	10/20	8/15	20/30	6/10	74/140

See Huntly’s full scores in Appendix 1: Indicator table.

## 12.3. Huntly Town Centre Health Check Results

<p><b><u>Strengths</u></b></p> <ol style="list-style-type: none"> <li>1. The Square is busy and an attractive place to walk in.</li> <li>2. There are a good range of cultural and community facilities with the library sitting in a central location.</li> <li>3. Huntly recorded an exceptional level of pedestrian footfall; far more than in previous years.</li> <li>4. Gordon Street gives quick access by road between the town centre and the A96.</li> <li>5. The town centre is served by bus services to Aberdeen and Inverness. There are also rail services to the same places from the train station which is a 10 minute walk from the town centre.</li> </ol>	<p><b><u>Weaknesses</u></b></p> <ol style="list-style-type: none"> <li>1. Duke Street has a ‘run-down’ appearance in places.</li> <li>2. There are several vacant units on Duke Street and in the Square.</li> <li>3. There is a high number of vacant units in general which has been found to be an issue in previous years.</li> <li>4. There are few open spaces to sit down and encourage people to spend time in Huntly town centre.</li> <li>5. Other than flowered areas in the Square, there is a lack of green infrastructure which would make the town centre more attractive to visitors and residents.</li> </ol>
<p><b><u>Opportunities</u></b></p> <ol style="list-style-type: none"> <li>1. The Square is a focal point for the town centre and already houses attractive restaurants and shops; however the area could improve further if additional green infrastructure and street furniture was in place.</li> <li>2. Huntly Hotel is a prominent building and could be redeveloped.</li> <li>3. There are no clothes shops in the town centre (other than charity shops) – filling some of the vacant units with these and other comparison units could attract more footfall.</li> <li>4. A high number of premises upstairs in Huntly Square are vacant with the potential to redevelop, there may be opportunity for town centre living.</li> </ol>	<p><b><u>Threats</u></b></p> <ol style="list-style-type: none"> <li>1. Huntly is the smallest town in Aberdeenshire with two supermarkets which attracts footfall away from the town centre and gives convenience stores in the town centre competition.</li> </ol>

## 12.4. Observational Map of Huntly



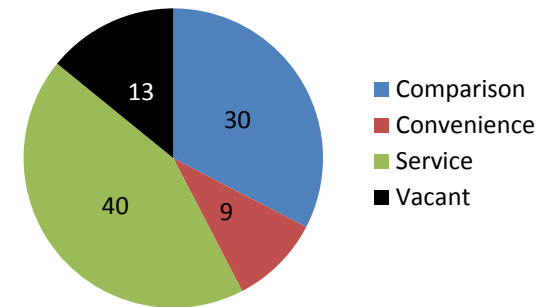
## 12.5 Huntly Retail Review

Retail in Huntly town centre is primarily housed on Duke Street, the Square and Gordon Street. There is an adequate range of shops to provide for the town's population and the high number of vacant units leave room for further shops. As the link between Gordon Street and Duke Street, the Square sees high levels of footfall to support its occupied units which include 3 restaurants, McColl's, and several financial services. Gordon Street hosts a range of retail uses including Costcutter, the popular confectioner Rizza's and several comparison, food and hair & beauty outlets. Several professional services have outlets on Duke Street. Huntly town centre has a low number of multiple retailers and clothing shops which would attract even more footfall.

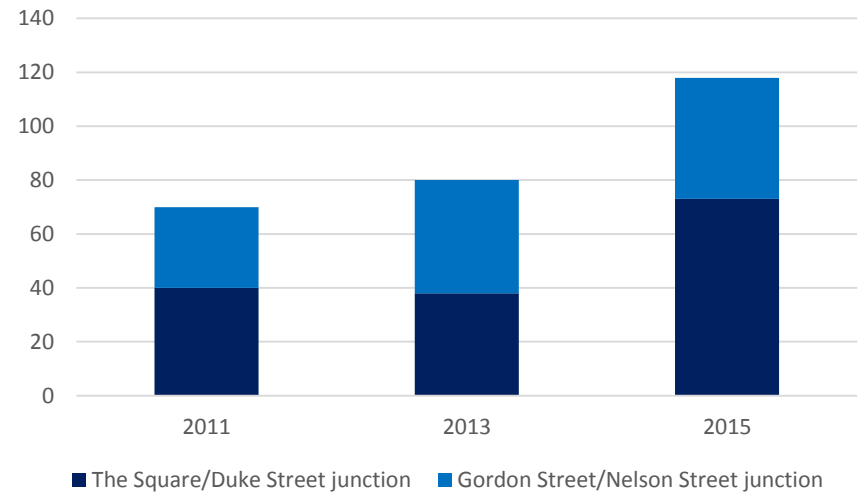
## 12.6 Huntly Pedestrian Count Analysis

Huntly recorded exceptional levels of pedestrian footfall in its 2015 count – far more than in any previous health check. The junction between Duke Street and The Square especially showed consistently high levels throughout the day of the count. The high figure was gained despite Huntly's relatively small population, the two out of town supermarkets, and the high number of vacant units. The impressive count could be put down to Huntly's variety of specialist shops, community and visitor facilities, and accessibility.

### Huntly Retail Units



### Huntly Average Pedestrian Counts



## 13. Inverurie

### 13.1. Inverurie Context

Inverurie is 16 miles northwest of Aberdeen and is one of Aberdeenshire’s most important service centres, providing for the Garioch area and beyond. It is positioned between the River Urie and the River Don on the main Aberdeen to Inverness road and rail routes. There are numerous opportunities to create more housing and employment in the town in the near future. USP shows that Inverurie is a fairly independent town and confirms that the primary industries in the 12,760-strong town relate to the support of the agriculture and oil industries although a large number of workers commute to Aberdeen. There are a range of professional and non-professional jobs, and Inverurie’s socioeconomic status is higher than in other similar towns.



### 13.2. Inverurie Final Scores

Retail	Activity	Physical Environment	Property	Accessibility	Community	Total
29/35	12/15	12/20	14/15	20/30	8/10	95/140

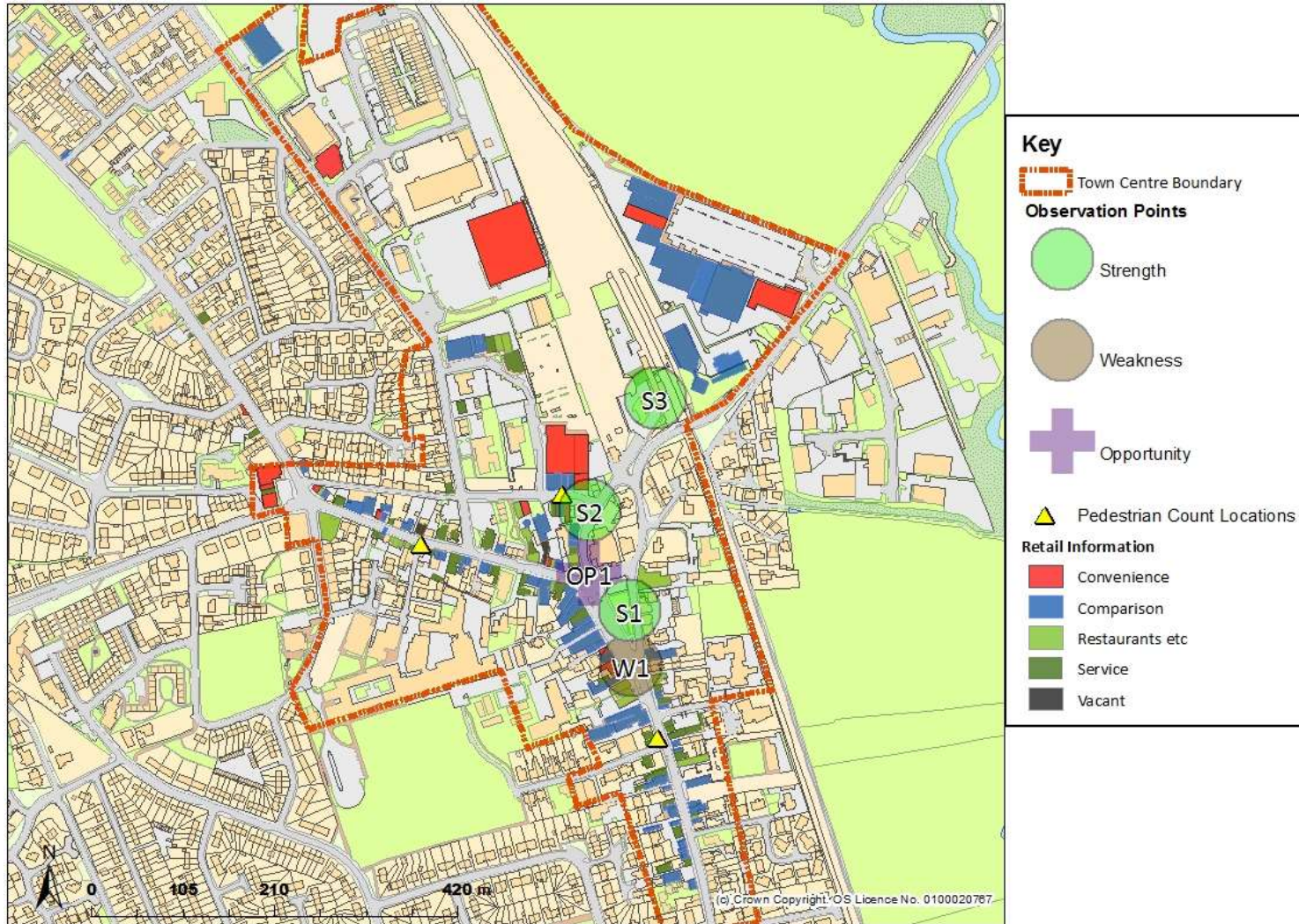
See Inverurie’s full scores in Appendix 1: Indicator table.

### 13.3. Inverurie Town Centre Health Check Results

<p><b><u>Strengths</u></b></p> <ol style="list-style-type: none"> <li>1. Inverurie war memorial and the surrounding grass make a very attractive green space.</li> <li>2. The junction at Burn Lane and Station Road recorded the highest pedestrian count from all the sites surveyed in the health checks – the area is the link between the well-known multiple retailers in Station Square, and Market Place.</li> <li>3. The town centre is served by both an extremely frequent bus service to Aberdeen and a regular service to Inverness as well as frequent rail services directly to Aberdeen and Inverness and less frequent services directly to Edinburgh and Glasgow.</li> <li>4. Inverurie is a diverse and productive retail centre with a wide range of convenience, comparison and service units.</li> <li>5. There is good choice of both multiple retailers and independent shops for shoppers.</li> <li>6. Inverurie has one of the lowest vacancy rates of the towns studied with several previously vacant units occupied.</li> <li>7. There is also a strong presence of cultural, community and visitor facilities including a swimming centre, a library, and convenient signposting.</li> </ol>	<p><b><u>Weaknesses</u></b></p> <ol style="list-style-type: none"> <li>1. Traffic has a negative effect with large volumes cutting through the centre and few traffic calming measures – it can be difficult to cross roads at suitable places.</li> <li>2. Considering this impact, there is a need for further cycle infrastructure.</li> <li>3. There is a lack of quality open space which would encourage people to sit down and/or spend more time in the town centre.</li> <li>4. Inverurie sees above average crimes committed including more road traffic crimes than any other towns studied here.</li> </ol>
<p><b><u>Opportunities</u></b></p> <ol style="list-style-type: none"> <li>1. Market Square could accommodate further green infrastructure and traffic calming measures to become more attractive and pedestrian-friendly.</li> <li>2. Retail in Inverurie can continue to thrive with the growing population in the town as well as support from Kintore, Kemnay &amp; Oldmeldrum and other rural villages.</li> <li>3. There is potential for the town centre boundary to be expanded to include North Street where there are several shops and services.</li> </ol>	<p><b><u>Threats</u></b></p> <ol style="list-style-type: none"> <li>1. The relocation of the health centre could direct footfall away from the town centre – an appropriate use for the site must be found to replace the loss.</li> </ol>



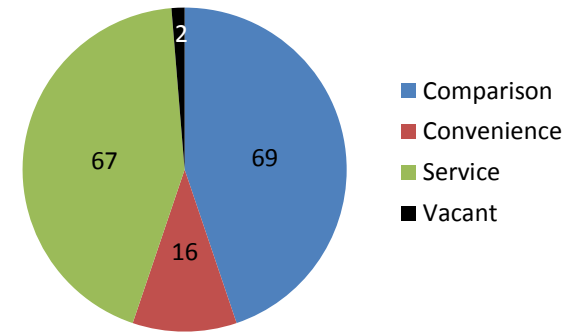
### 13.4. Observational map of Inverurie



### 13.5. Inverurie Retail Review

Inverurie town centre is a strong, robust retail centre which is performing at full capacity with very few vacant units. The main shopping areas are in and around the High Street, Market Place and Inverurie retail park. There is a wide choice for consumers in convenience outlets including several well-known multiple convenience stores. There is especially a great selection of clothes, furniture/carpets, hardware & DIY, electrical, sports & hobby shops. Indeed, every type of retail covered in the health check is found in the town centre. There are also a variety of restaurants, cafes & pubs and financial services. High Street, Market Place, West High Street and Station Square are all close together while Tesco and Inverurie Retail Park are within a reasonable walking distance. High Street, West High Street and Market Place host a mix of comparison and service outlets however several large convenience stores are on the fringes of the town centre. With Inverurie Academy, excellent transport links, and extensive car parking around the town centre, Inverurie is fulfilling its potential as a successful retail centre.

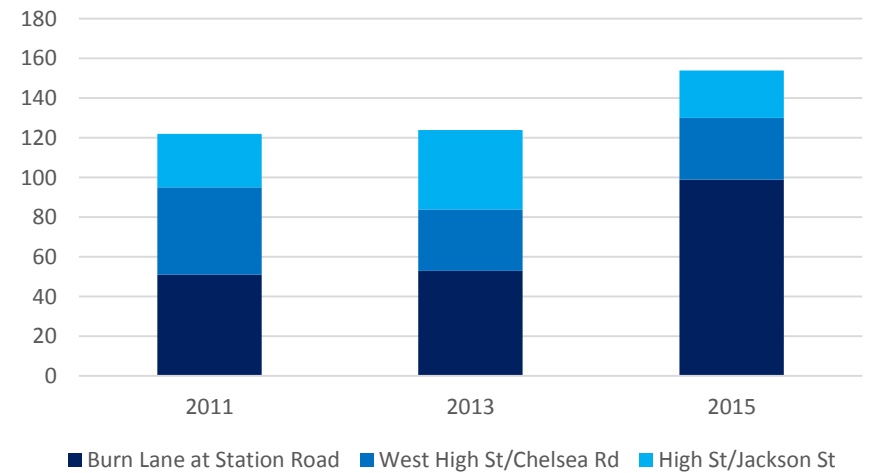
**Inverurie Retail Units**



### 13.6. Inverurie Pedestrian Count Analysis

Inverurie is one of two towns where three pedestrian counts were carried out instead of two due to its large town centre. The town centre recorded its highest pedestrian count in the history of Aberdeenshire Health Checks, and the highest overall count in the 2015 check. This reflects Inverurie’s attractive retail selection and high overall score in the Health Check. The junction at Burn Lane and Station Road saw a consistently high number of pedestrians pass throughout its three counts – the point is on a main pedestrian route between the retail on Burn Lane & the north of the town, and Market Place.

**Inverurie Average Pedestrian Counts**



## 14. Macduff

### 14.1. Macduff Context

Macduff is situated just across the valley of the Deveron from Banff on the north coast of Aberdeenshire and has a population of 4,030. Macduff, an archetypal Scottish fishing town, has a harbour in use and existing buildings also reflect the fishing and shipbuilding activities. Its town centre stands along the working port and maintaining the area is a high priority. USP indicates that Macduff is one of three interdependent towns in Aberdeenshire – it relies on Banff for resources such as shops, a hospital and a secondary school. There are a high number of manufacturing jobs in the town and a large percentage of the workforce are skilled manual workers.



### 14.2. Macduff Final Scores

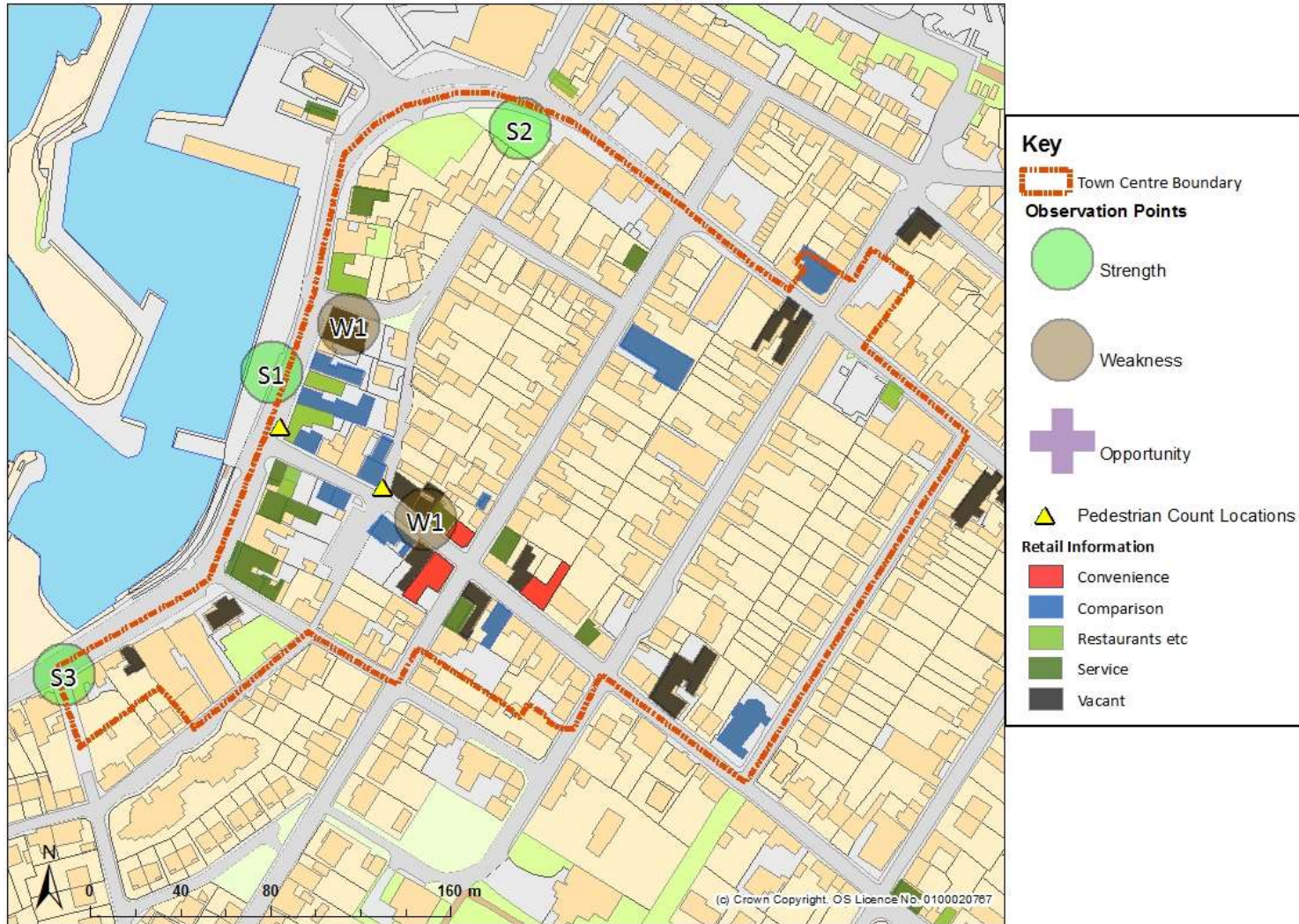
Retail	Activity	Physical Environment	Property	Accessibility	Community	Total
7/35	6/15	13/20	4/15	12/30	6/10	48/140

See Macduff's full scores in Appendix 1: Indicator table.

### 14.3. Macduff Town Centre Health Check Results

<p><b><u>Strengths</u></b></p> <ol style="list-style-type: none"> <li>1. The seafront is a pleasant area of open space and there is good seating areas in appropriate places.</li> <li>2. There are signs of attractive green space through hanging baskets, the memorial garden and the seafront. There is a particularly pleasant green space off Crook O’Ness Street.</li> <li>3. There is a variety of style of buildings with many of high quality, with good views to them from the streets. The Parish Church gives an attractive sight from the town centre.</li> <li>4. There are reasonable signage and public transport facilities including a useful intra-town service and pleasant historic plaques.</li> <li>5. The grid layout and lack of traffic mean the town centre is pedestrian friendly.</li> <li>6. Very few crimes are committed in Macduff town centre.</li> </ol>	<p><b><u>Weaknesses</u></b></p> <ol style="list-style-type: none"> <li>1. Key clusters of vacancies are on Shore Street and Duff Street. Key buildings that are vacant include the old Clydesdale Bank and Bayview Hotel.</li> <li>2. There is very little retail in the town centre to serve its population. There is an especially narrow range of independent shops and poor choice of food shops with no baker, butcher, or greengrocer.</li> <li>3. The vacancy rate of Macduff town centre is the highest of the towns studied. Several units appear to have been vacant for some time and have become derelict which has a negative impact on the town centre.</li> <li>4. There are no facilities for cyclists evident.</li> <li>5. Despite the high quality architecture, many buildings haven’t been maintained properly and look derelict. This is especially an issue on Shore Street.</li> <li>6. Macduff recorded the lowest footfall in its town centre by some distance.</li> </ol>
<p><b><u>Opportunities</u></b></p> <ol style="list-style-type: none"> <li>1. Any new business set up would have little competition in the town centre and ample choice of units to move into.</li> </ol>	<p><b><u>Threats</u></b></p> <ol style="list-style-type: none"> <li>1. Poorly maintained architecture, Macduff’s isolated location and competition from Banff may make it difficult to attract new occupiers into the town.</li> </ol>

## 14.4. Observational map of Macduff



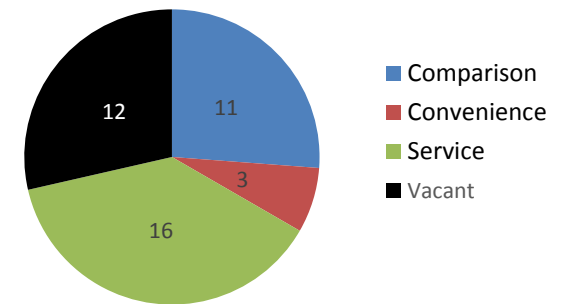
## 14.5. Macduff Retail Review

Although Macduff has a recognisable town centre and a considerable population to serve, there are far fewer shops and services than most other towns included in the health check. Most of its retail outlets are on Duff Street and Shore Street. There are scenic views to the North Sea from Shore Street and a basic mix of services and shops including a café however two of the most prominent units are vacant. Duff Street has some occupied units including 3 convenience outlets close together which generate a small level of competition and footfall but again there are also several vacant units. If Macduff could fill more occupied units with a wider range of convenience and comparison shops, look after its buildings and install some more attractive green infrastructure, it could create a retail presence to compete with Banff. However, with the pair of towns being quite so isolated from many other towns and especially from Aberdeen City, and Banff providing the bulk of retail for both of them, there is a real challenge for Macduff's retail prospects.

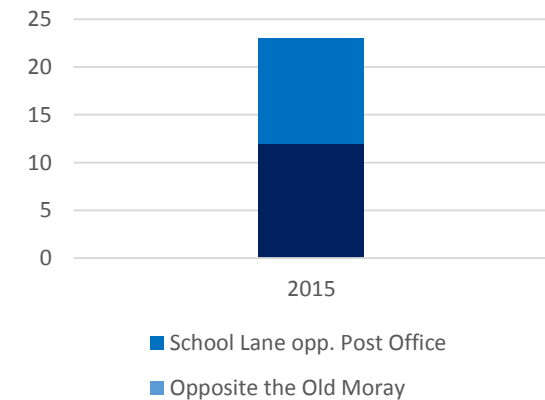
## 14.6. Macduff Pedestrian Count Analysis

Macduff recorded the lowest number of pedestrians in the 2015 Health Check. This is likely due to the lack of retail & services and poor accessibility. The number of vacant units make Macduff town centre a less attractive area to shop in. As mentioned previously, Banff town centre provides a much wider range of retail. Macduff town centre has the architecture, population, and retail units as well as a pleasant seafront to become far busier than it is currently. As Macduff is a new inclusion to the Health Checks, there are no scores from previous years available to show.

### Macduff Retail Units



### Macduff Average Pedestrian Count 2015



# 15. Peterhead

## 15.1. Peterhead Context

Peterhead is a main service and employment centre on the east coast around 30 miles from Aberdeen and is the largest town in Aberdeenshire with a population of 18,450. The town is one of the most important fishing ports in Europe and is one of Aberdeenshire’s strategic locations as an important oil and gas town with the St Fergus gas terminal nearby. There are possibilities for Peterhead to expand considerably through new housing and employment land. USP shows that Peterhead is a fairly independent town with a high number and broad diversity of professional and non-professional jobs.



## 15.2. Peterhead Final Scores

Retail	Activity	Physical Environment	Property	Accessibility	Community	Total
22/35	8/15	10/20	10/15	17/30	3/10	70/140

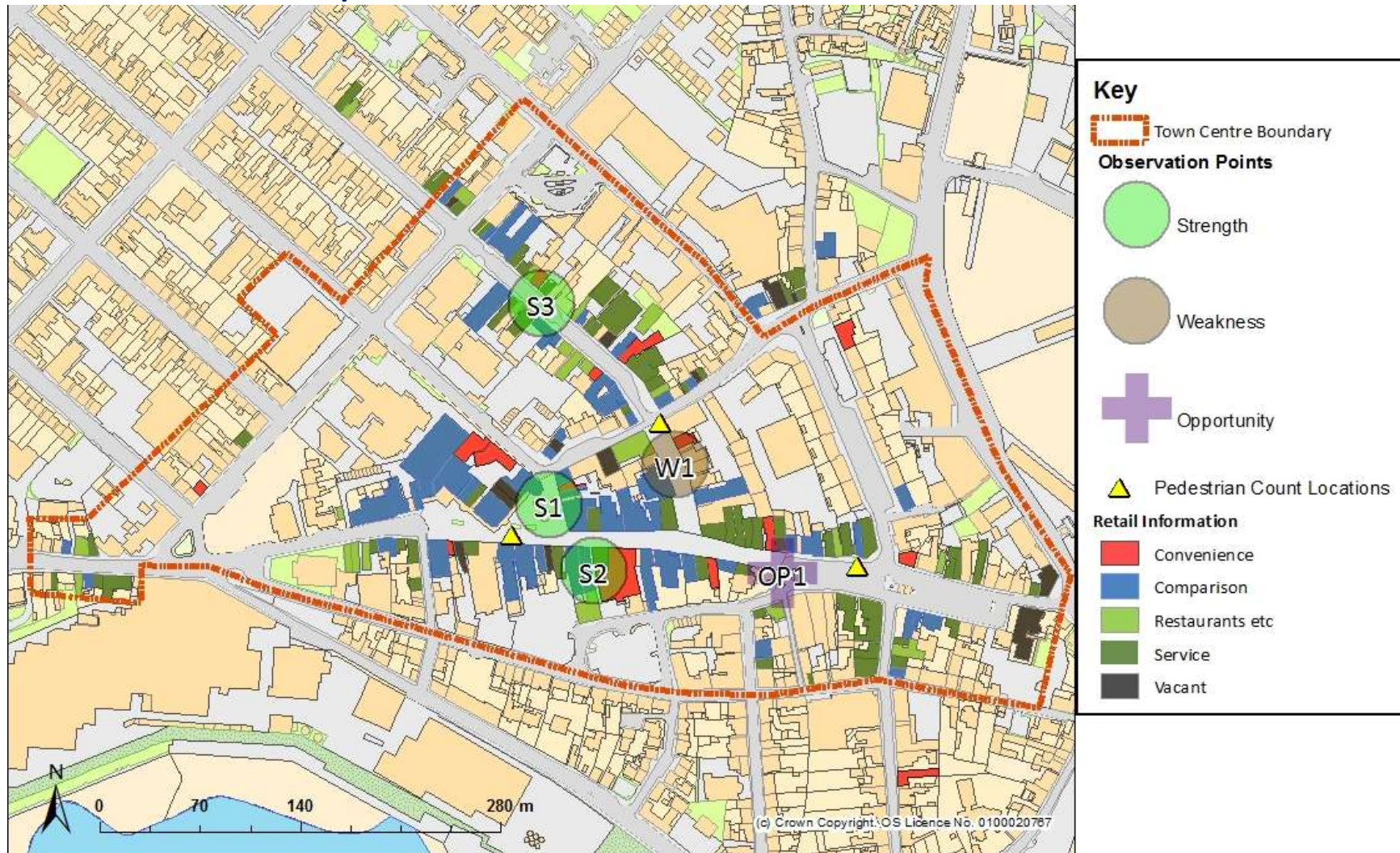
See Peterhead’s full scores in Appendix 1: Indicator table.

### 15.3. Peterhead Town Centre Health Check Results

<p><b><u>Strengths</u></b></p> <ol style="list-style-type: none"> <li>1. The area around Marischal Street, Drummers Corner and Chapel Street is an attractive area to shop in because of its pedestrianisation. This encourages people to take their time in the area and allows them to move between shops easily.</li> <li>2. Alleys off Marischal Street provide a useful permeability to the south of the town centre and are decorated with their own names and signs.</li> <li>3. Several units on Queen Street support the evening economy while Subway generates footfall during the day.</li> <li>4. There is little negative traffic impact even in other areas of the town centre with speed bumps used as traffic calming.</li> <li>5. There is generally an adequate diversity and volume of retail in the town centre, including a wide range of multiple retailers and professional services.</li> <li>6. Visitor infrastructure includes attractive signs in the shape of boats, competent public transport links, and toilets, phone boxes and an information board at Drummer's Corner.</li> </ol>	<p><b><u>Weaknesses</u></b></p> <ol style="list-style-type: none"> <li>1. Despite the pedestrianised area and large population, there is unimpressive footfall in the town centre – Chapel Street is being redeveloped and is quiet despite being a main link street.</li> <li>2. There are a few pleasant areas of flowers, especially in Drummers Corner, but overall a severe lack of green infrastructure.</li> <li>3. Peterhead sees the highest number of crimes committed in its town centre among Aberdeenshire towns by some distance.</li> <li>4. There are few cultural or community facilities located in the town centre.</li> </ol>
<p><b><u>Opportunities</u></b></p> <ol style="list-style-type: none"> <li>1. Tolbooth Wynd could incorporate green infrastructure and further retail to support the Field Marshal Keith statue and car park.</li> <li>2. More green infrastructure throughout and another café with outdoor seating when possible would make the most of the pedestrianised area.</li> <li>3. More lighting in and around the alleys would make them more attractive to pedestrians.</li> </ol>	<p><b><u>Threats</u></b></p> <p>No threats were identified in Peterhead.</p>



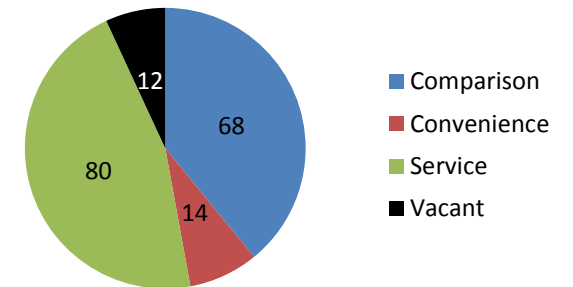
## 15.4. Observational map of Peterhead



## 15.5. Peterhead Retail Review

Peterhead has 163 occupied retail or service units in its town centre which is the most in Aberdeenshire by a narrow margin (although this is offset by Peterhead’s population being the largest). There is a wide selection of comparison and convenience retail and Peterhead has more financial and professional services than any other town centre in Aberdeenshire. Many of Peterhead’s comparison outlets, including Argos, New Look and W H Smith are located on Drummers Corner and Marischal Street – this creates high footfall and potential trade for retailers in the area. Services and hot food outlets, including Subway, are largely found on Broad Street and Queen Street while convenience outlets are spread evenly across the town centre. The pedestrianisation in place makes Peterhead unique in Aberdeenshire as a retail centre and the addition of further green infrastructure as seen in Ellon and Turriff, and another café with seasonal outdoor seating on Marischal Street would help the town to become even more attractive.

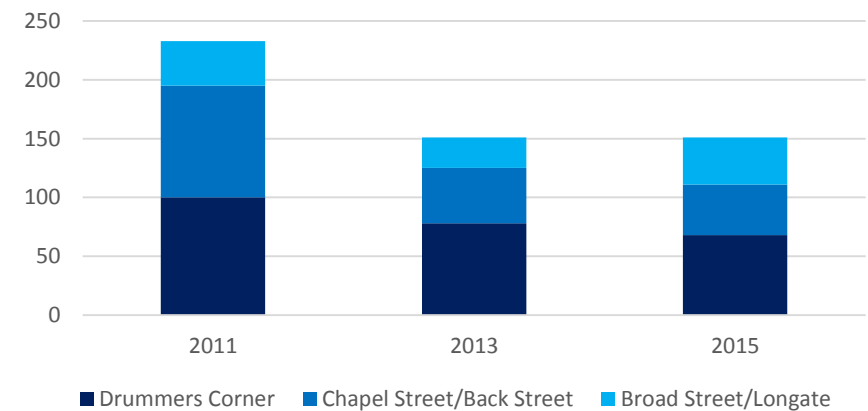
**Peterhead Retail Units**



## 15.6. Peterhead Pedestrian Count Analysis

Peterhead is one of two towns where three pedestrian counts were carried out instead of two due to its large town centre. The town centre recorded poor levels of footfall relative to its population and number of retail outlets and services. This is despite Peterhead being the only town to incorporate pedestrianisation in its town centre and its pedestrian-friendly layout. However, this may largely be explained by the reconstruction of Chapel Street taking place near one of the pedestrian count points – the scaffolding and several units out of use would have severely decreased the potential for footfall. An improved score would be expected when Chapel Street is fully developed.

**Peterhead Average Pedestrian Counts**



## 16. Portlethen

### 16.1. Portlethen Context

Portlethen is a commuter town of 8,200 people, situated just 8 miles south of Aberdeen. Although Portlethen has an official town status it acts more as an outlying suburb of Aberdeen with few distinctive buildings, retail, facilities or services for its size. The retail park does not pass as a true town centre – there is very little to encourage residents or visitors to spend time in the area. Providing employment opportunities is important for the town and there is potential for further employment land to be created to the north and west of the town. USP indicates that Portlethen is one of three interdependent towns in Aberdeenshire. It also shows that there is a high percentage of workers in office and administrative jobs, and a high percentage of residents with high incomes.



### 16.2. Portlethen Final Scores

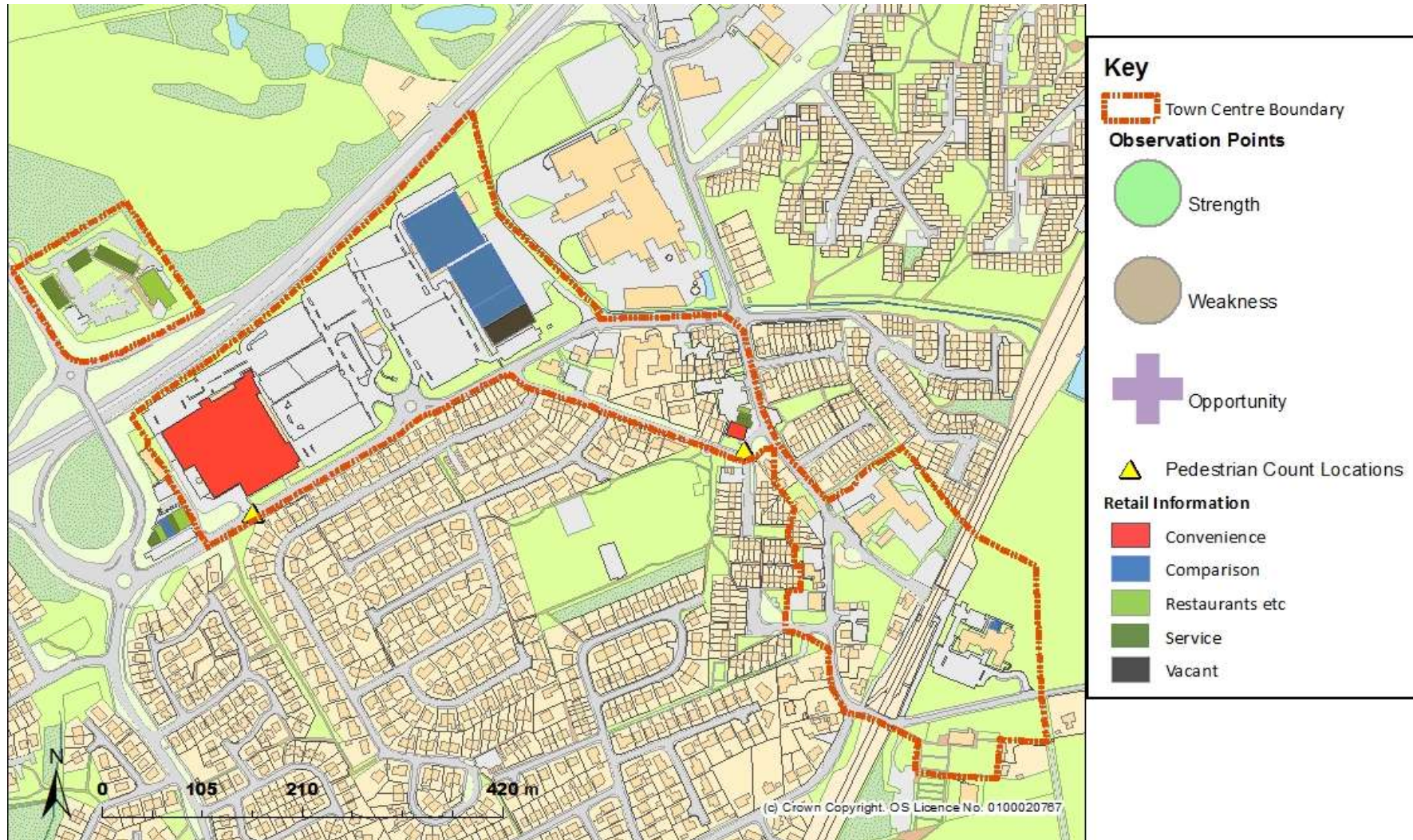
Retail	Activity	Physical Environment	Property	Accessibility	Community	Total
5/35	3/15	7/20	8/15	14/30	7/10	44/140

See Portlethen's full scores in Appendix 1: Indicator table.

### 16.3. Portlethen Town Centre Health Check Results

<p><b><u>Strengths</u></b></p> <ol style="list-style-type: none"> <li>1. There are few crimes committed in the town centre.</li> <li>2. There are frequent buses to Aberdeen and Stonehaven, and trains to Aberdeen and the South.</li> </ol>	<p><b><u>Weaknesses</u></b></p> <ol style="list-style-type: none"> <li>1. Portlethen has very few retail or hot food outlets, or professional services – there is especially a lack of specialist independent shops which are seen in other towns.</li> <li>2. There is no clear town centre - the occupied units that are present are spread out across a wide area and have poor pedestrian links.</li> <li>3. There are no buildings of any significance – several of the retail units appear ‘run down’.</li> <li>4. There are low levels of footfall.</li> <li>5. Although there are areas of greenery, there is little open space with facilities which would encourage people to spend time in the town centre (Although Nicol Park &amp; Burnside Park are close by).</li> <li>6. There is no visitor infrastructure and few community facilities.</li> </ol>
<p><b><u>Opportunities</u></b></p> <ol style="list-style-type: none"> <li>1. If a unit can be found to start a business, there are many types of retail or professional services which local residents are not already provided for.</li> </ol>	<p><b><u>Threats</u></b></p> <ol style="list-style-type: none"> <li>1. Despite having so few retail units, there is only one vacancy which makes expansion difficult.</li> </ol>

## 16.4. Observational map of Portlethen



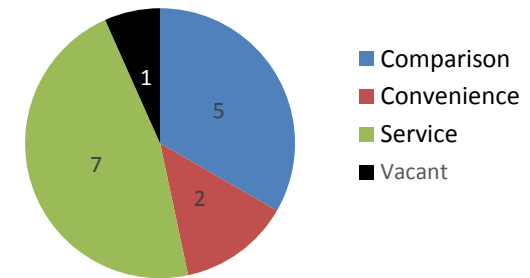
## 16.5. Portlethen Retail Review

Portlethen has no recognised retail centre. There are a minimal amount of grocery shops, hot food outlets and services however they are mainly housed in retail parks and generate traffic rather than pedestrians. The supermarket has no real competition. There are a handful of comparison units but residents of Portlethen have to go to Aberdeen to buy most goods. Despite this there is little scope for expansion in Portlethen due to a lack of units or space on which to build outwith the retail park. As Portlethen is a new inclusion to the Health Checks, there are no scores from previous years available to show.

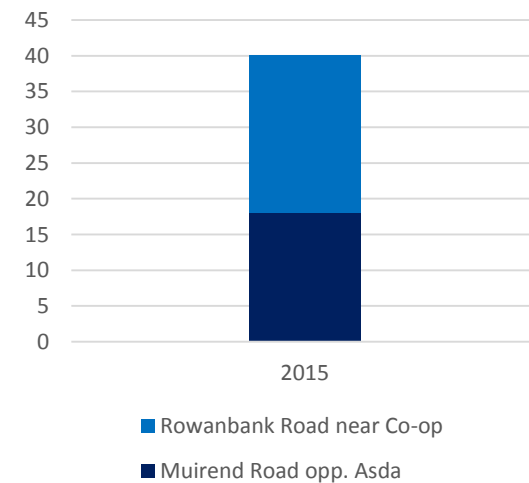
## 16.6. Portlethen Pedestrian Count Analysis

Only one town recorded a lower pedestrian count in the 2015 health check – Portlethen town centre does not have enough retail units, restaurants or other services to attract its residents. Those that do visit are likely to drive into the town centre to visit the supermarket or retail park instead of walking through. Portlethen is also hampered by its lack of cultural or visitor facilities – as mentioned, it acts more as an outlying suburb of Aberdeen and not a town many are likely to visit.

### Portlethen Retail Units



### Portlethen Average Pedestrian Count 2015



# 17. Stonehaven

## 17.1. Stonehaven Context

Stonehaven is situated in Stonehaven Bay on Aberdeenshire’s east coast, 15 miles south of Aberdeen. Stonehaven is an important service centre and one of the most popular tourist and visitor destinations in Aberdeenshire. Many workers in the town’s 11,370 strong population commute to Aberdeen. The town has healthy marine and tourism industries, and a history of being a strong fishing town. There are opportunities for new housing and employment in the near future which will help to meet demand. USP shows Stonehaven is a fairly independent town although a large part of the workforce do commute to Aberdeen. There are very low levels of deprivation and a mix of professional and non-professional workers with a higher than average percentage of those in the property and education sectors.



## 17.2. Stonehaven Final Scores

Retail	Activity	Physical Environment	Property	Accessibility	Community	Total
27/35	9/15	7/20	11/15	12/30	8/10	74/140

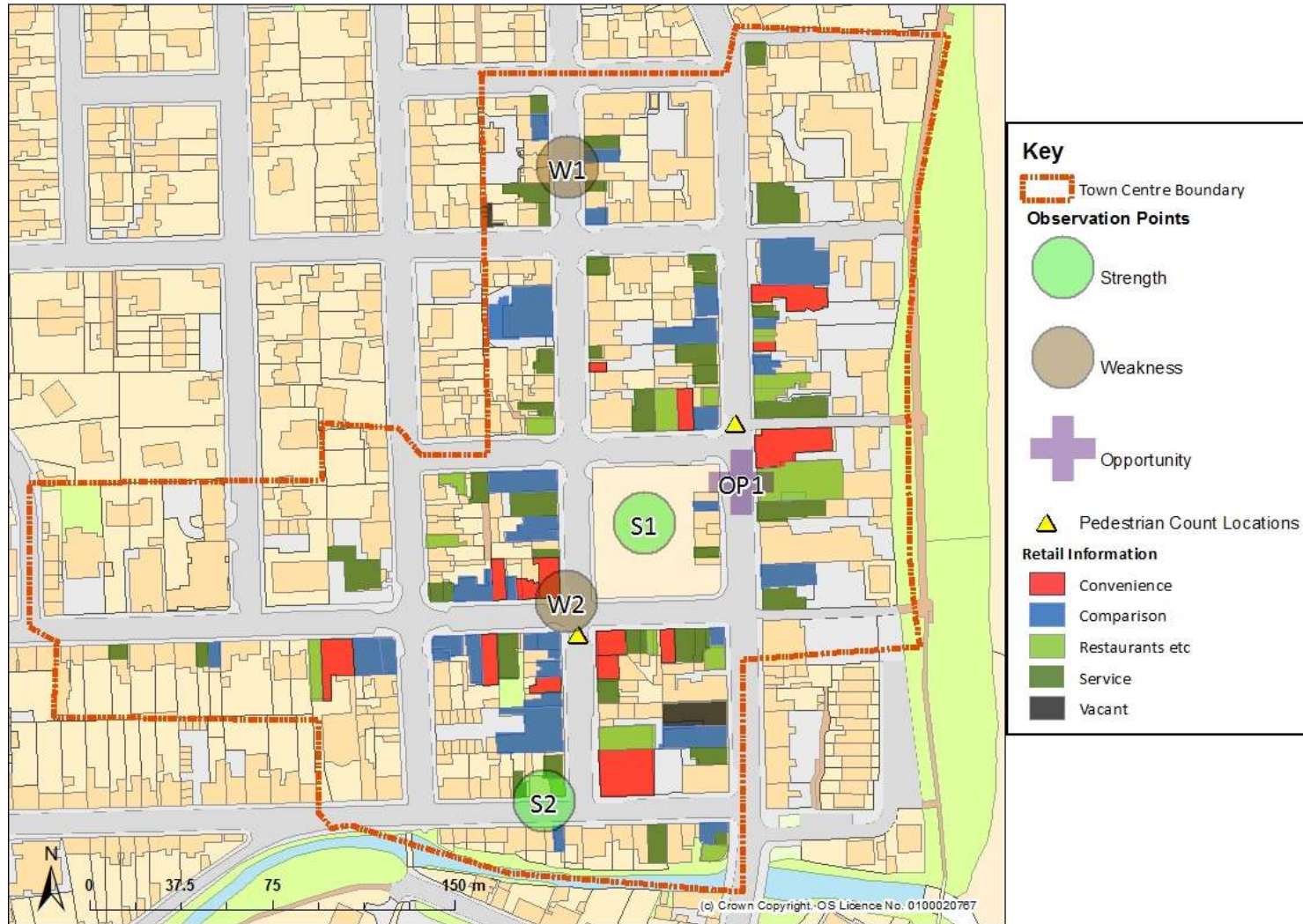
See Stonehaven’s full scores in Appendix 1: Indicator table.

### 17.3. Stonehaven Town Centre Health Check Results

<p><b><u>Strengths</u></b></p> <ol style="list-style-type: none"> <li>1. Market Square provides a focal point with car parking and a variety of retail.</li> <li>2. Stonehaven is at the peak of its potential as there are very few vacancies. Previously vacant units on Cameron Street are now occupied.</li> <li>3. Stonehaven has a reasonable level of retail outlets and a high level of professional services relative to other town centres.</li> <li>4. Visitor infrastructure including a tourist information centre, good signage, public toilets and historic information boards are well maintained as the town centre benefits from Stonehaven’s attractive beach.</li> <li>5. There are frequent bus services to Aberdeen and Dundee. The town centre is also around a 20 minute walk from the rail station which connects the town to Aberdeen and the South.</li> </ol>	<p><b><u>Weaknesses</u></b></p> <ol style="list-style-type: none"> <li>1. Barclay Street becomes very quiet as it runs north past Margaret Street.</li> <li>2. There is no quality open space and a minimal level of green infrastructure to encourage people to spend time in the town centre.</li> <li>3. There are few pedestrian crossings and little use of traffic calming despite busy roads, with Barclay Street an issue.</li> <li>4. There are no cycle facilities.</li> <li>5. There are few car parks in or around the town centre.</li> </ol>
<p><b><u>Opportunities</u></b></p> <ol style="list-style-type: none"> <li>1. Traffic calming installed around the Square including on Allardice Street would give a better experience for pedestrians.</li> <li>2. The town is an attractive coastal location and has competent visitor infrastructure –any areas of flowers, plants or grass in the town centre would encourage visitors and residents alike to spend more time there and boost the already positive retail scene.</li> <li>3. There is potential for the town centre boundary to extend north along David Street to include the Co-operative store.</li> </ol>	<p><b><u>Threats</u></b></p> <ol style="list-style-type: none"> <li>1. There have been multiple bids for major supermarkets on locations outwith the town centre which could impact on footfall and businesses within the town centre.</li> </ol>



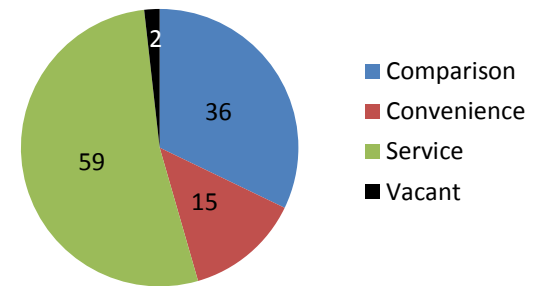
## 17.4. Observational map of Stonehaven



## 17.5. Stonehaven Retail Review

Stonehaven town centre is focused on Market Square, with Allardice Street, Barclay Street and Evan Street housing the bulk of Stonehaven’s retail units. The layout is compact although not very permeable due to busy traffic around Market Square. There is a large concentration of convenience outlets on and near Evan Street who have situated themselves the furthest point of the town centre away from the Co-op which is just outside the boundary, including a butchers and bakers (although there is also another Co-op). There is a good variety of hair and beauty salons, other professional services, and independent hot food outlets which compete with those on the beachfront. There are extremely few vacant properties to give a negative feel to pedestrians’ experience. Despite these positive aspects of Stonehaven’s town centre there are strong aspirations for a major out-of-town supermarket. This would attract residents away from, and limit the value of retail space in, the town centre.

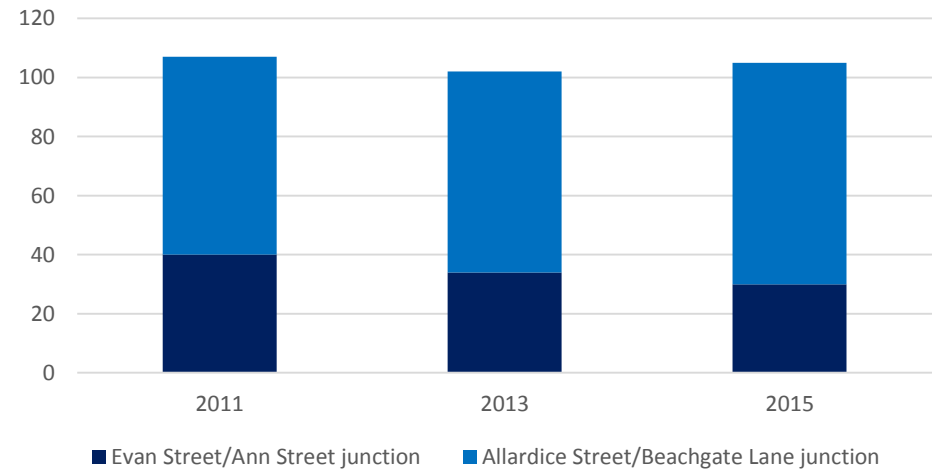
**Stonehaven Retail Units**



## 17.6. Stonehaven Pedestrian Count Analysis

Stonehaven has recorded consistently good pedestrian counts over the past 3 health checks. The point between Allardice Street and Beachgate Lane, acting as a link between Market Square and the beach front, is always one of the busiest places in Aberdeenshire town centres. Stonehaven would likely have recorded an even higher score in 2015 but weather was poor on the day of the counts. The impressive count is testament to Stonehaven’s diversity of retail and visitor infrastructure & facilities.

**Stonehaven Average Pedestrian Counts**



## 18. Turriff

### 18.1. Turriff Context

Turriff, situated 34 miles northwest of Aberdeen, is an independent service centre for the town’s population of 5,030. The town has a history as an important agricultural centre and still relies on this as part of its economy. There is a sense of place given to the town centre by its sandstone buildings, a grid street plan, and the statue of the “Turra Coo”. There are large housing and employment possibilities to the north and east of the town to sustain existing services and facilities. USP shows Turriff is one of the three highly independent towns in Aberdeenshire. There are a high number of workers in skilled manual, office and admin jobs and of employment opportunities in the manufacturing, retail and education sectors. Turriff has extremely similar demographics to nearby Huntly.



### 18.2. Turriff Final Scores

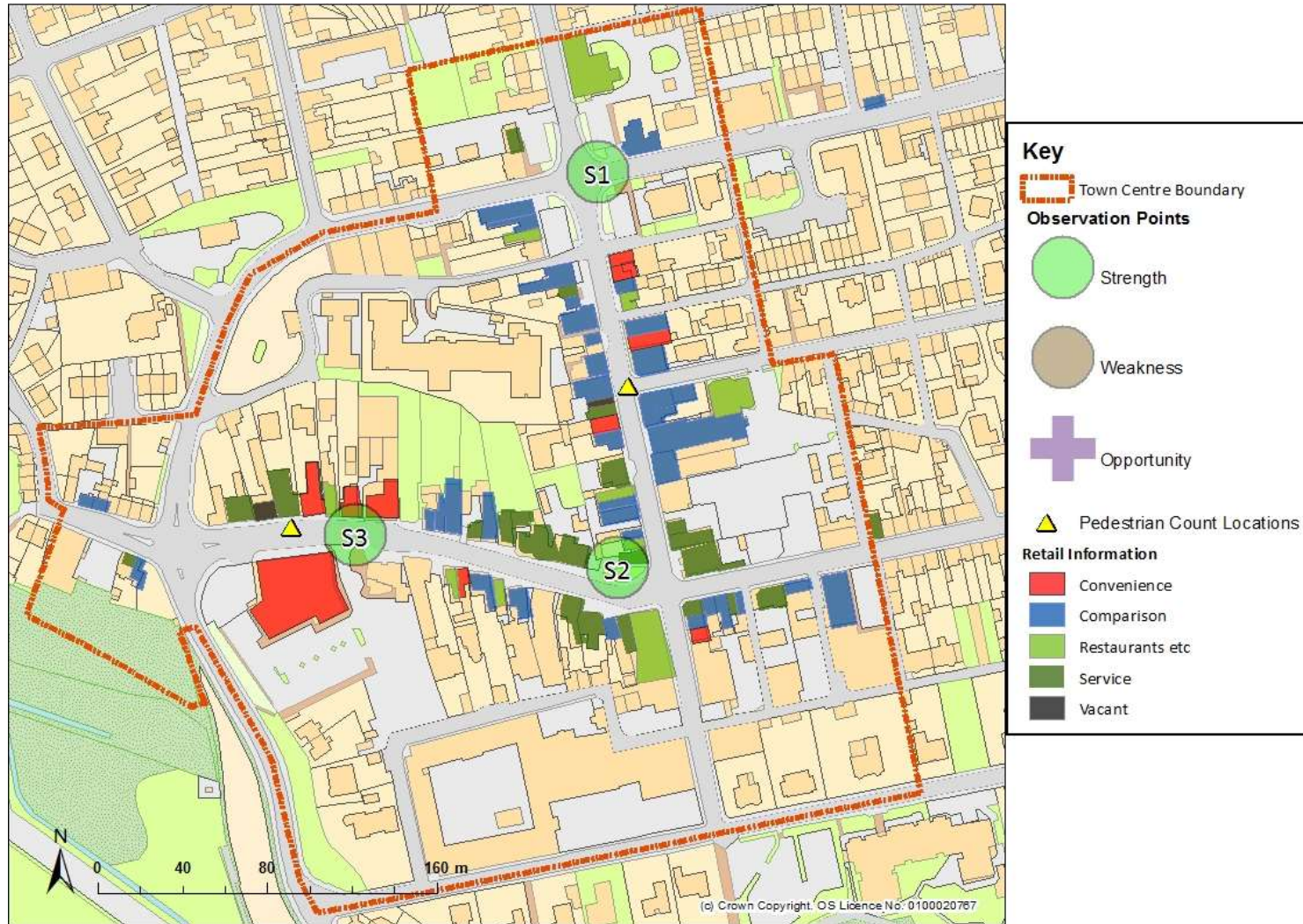
Retail	Activity	Physical Environment	Property	Accessibility	Community	Total
23/35	13/15	15/20	8/15	19/30	8/10	86/140

See Turriff’s full scores in Appendix 1: Indicator table.

### 18.3. Turriff Town Centre Health Check Results

<p><b><u>Strengths</u></b></p> <ol style="list-style-type: none"> <li>1. There is a variety of attractive plants and shrubs throughout the town centre – especially around the north end of Main Street.</li> <li>2. The Turra Coo is a recognisable and meaningful piece of public art.</li> <li>3. Main Street and especially High Street recorded impressive pedestrian footfall.</li> <li>4. Cultural, community and visitor facilities include Turriff Library, the Town Hall, the Auld Post Office museum, and several informative heritage signs.</li> <li>5. The retail centre is vibrant with very few vacant units. Despite serving a relatively small population, there are a good mix of independent shops and convenience outlets.</li> <li>6. There are distinctive types of buildings in a good state of repair.</li> <li>7. Turriff town centre sees low numbers of crimes committed.</li> <li>8. The street layout and use of zebra and pelican crossings mean the town centre is permeable.</li> </ol>	<p><b><u>Weaknesses</u></b></p> <ol style="list-style-type: none"> <li>1. There are few cycle facilities in the town centre.</li> <li>2. There are fewer professional services including hair &amp; beauty salons than the average for Aberdeenshire.</li> </ol>
<p><b><u>Opportunities</u></b></p> <ol style="list-style-type: none"> <li>1. Turriff is isolated from Aberdeen City or any other larger retail centres, and there are no significant out-of-town supermarkets at present which allows town centre retail the maximum trade possible from the population of Turriff and its rural surroundings.</li> <li>2. The Turra Coo, rural surroundings and sandstone buildings give an attractive sense of place to visitors.</li> </ol>	<p><b><u>Threats</u></b></p> <ol style="list-style-type: none"> <li>1. There is potential for a major supermarket to be built on Market Street which could impact on footfall and businesses within the town centre.</li> </ol>

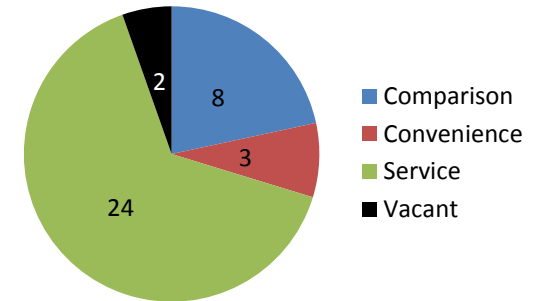
## 18.4. Observational map of Turriff



## 18.5. Turriff Retail Review

Main Street and High Street are the two main shopping streets in Turriff, and there are a mix of retail types on both. The town’s layout makes it straightforward for pedestrians to visit the majority of retailers in the town centre which gives shops a steady stream of passing trade. A cluster of convenience and grocery shops, including Tesco, generate footfall on High Street, and Celebrations on Main Street is an impressive independent comparison outlet selling a variety of goods. The layout, green infrastructure and lack of vacant properties make for a pleasant shopping experience.

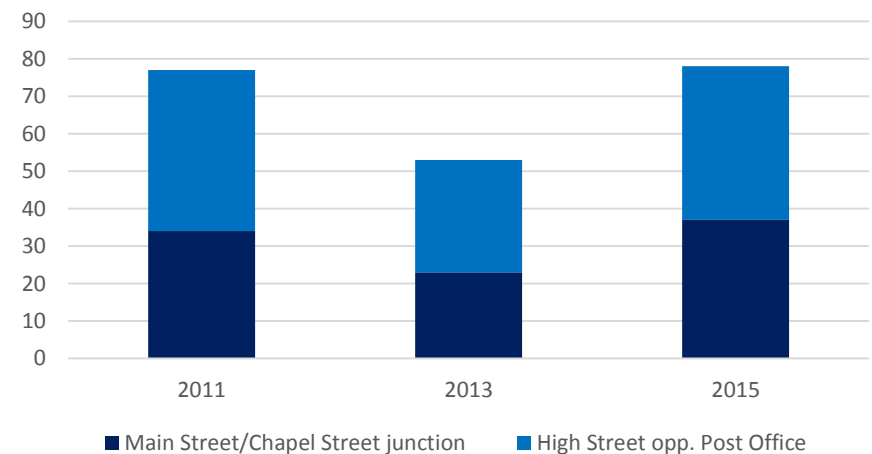
**Turriff Retail Units**



## 18.6. Turriff Pedestrian Count Analysis

Turriff town centre recorded very impressive levels of footfall relative to its population in 2015. There were very small differences between the different count locations instead of one point being much busier than the other, meaning retail is split well between the two main shopping streets and that the town centre is easily walkable. This was despite poor weather on the day of the counts. The impressive footfall backs up Turriff’s high scores throughout the 2015 health check and shows the town centre is a place people visit often.

**Turriff Average Pedestrian Counts**



## 19. Westhill

### 19.1. Westhill Context

Westhill was created in the 1960s and has grown extremely quickly in the last two decades. Lying 8 miles west of Aberdeen, its 11,600 population is among the lowest deprived in Aberdeenshire. Much of Westhill's working population either commute to Aberdeen or work at Arnhall Business Park which is in the south of the town and is key to Westhill's status as a subsea centre of excellence. Plans for the near future will be focused on maintaining Westhill as a successful employment centre. USP shows that Westhill is one of three interdependent towns in Aberdeenshire – this is due to the town's proximity to the retail and employment opportunities in Aberdeen. Westhill has very low levels of deprivation, high educational attainment, and a large percentage of workers in professional and office jobs.



### 19.2. Westhill Final Scores

Retail	Activity	Physical Environment	Property	Accessibility	Community	Total
8/35	5/15	12/20	11/15	22/30	10/10	68/140

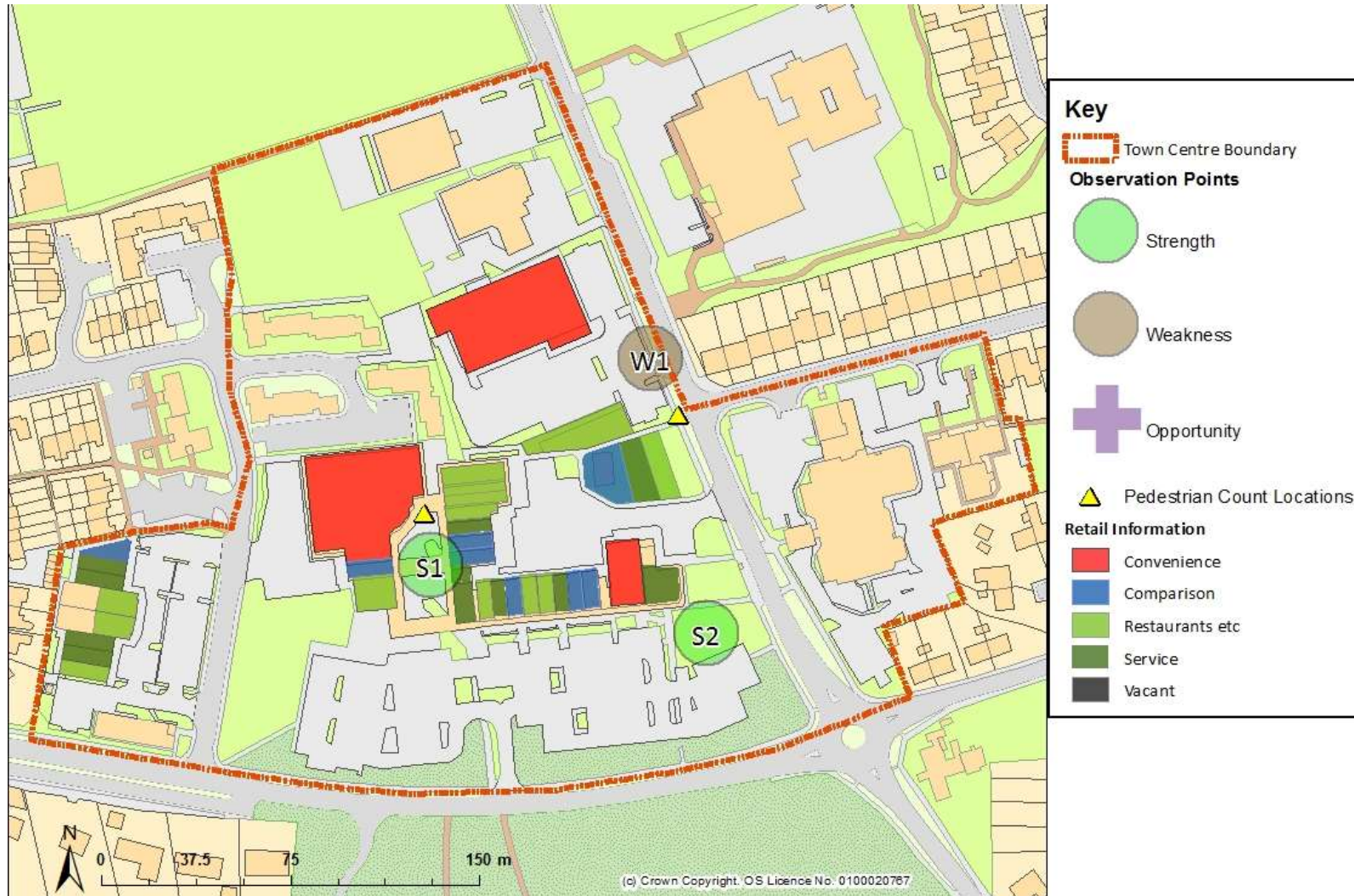
See Westhill's full scores in Appendix 1: Indicator table.

### 19.3. Westhill Town Centre Health Check Results

<p><b><u>Strengths</u></b></p> <ol style="list-style-type: none"> <li>1. The area of the shopping centre near Marks and Spencer sees the bulk of Westhill's footfall.</li> <li>2. There is an abundance of greenery throughout the area including at the shopping centre entrance.</li> <li>3. There are cycle boxes at intersections, undercover bike racks in a central, uncovered bike racks, cycle lanes, and a presence of cyclists.</li> <li>4. There are a number of hot food outlets.</li> </ol>	<p><b><u>Weaknesses</u></b></p> <ol style="list-style-type: none"> <li>1. There is a lack of footfall outside of the main shopping park.</li> <li>2. There are no attractive or historical buildings, streets or landmarks or any visitor infrastructure.</li> <li>3. Westhill has little variety of retail. There is a lack of choice or diversity of convenience or comparison units.</li> <li>4. There is also a lack of choice of financial &amp; professional services including hair &amp; beauty salons compared to other towns.</li> </ol>
<p><b><u>Opportunities</u></b></p> <ol style="list-style-type: none"> <li>1. Westhill Shopping Centre is undergoing expansion with new retail units being added.</li> </ol>	<p><b><u>Threats</u></b></p> <ol style="list-style-type: none"> <li>1. The major supermarket outwith the town centre and the town's proximity to Aberdeen mean there is a smaller scope for a diverse retail scene within the town centre compared with other towns.</li> </ol>



## 19.4. Observational map of Westhill



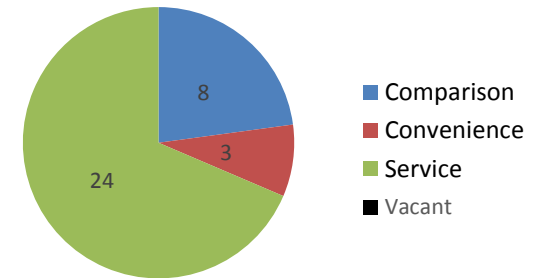
## 19.5. Westhill Retail Review

Retail in Westhill consists of the Shopping Centre off Old Skene Road, which is currently undergoing expansion, and the retail on Ashvale Drive. While these areas have no vacant units and a small mix of retail outlets, it is simply a retail park in the centre of a group of houses rather than an area which resembles a 'town centre'. There is not the same choice of retail as in most other towns – residents can travel to the out-of-town supermarket or Aberdeen for access to a wider selection of convenience and comparison retail.

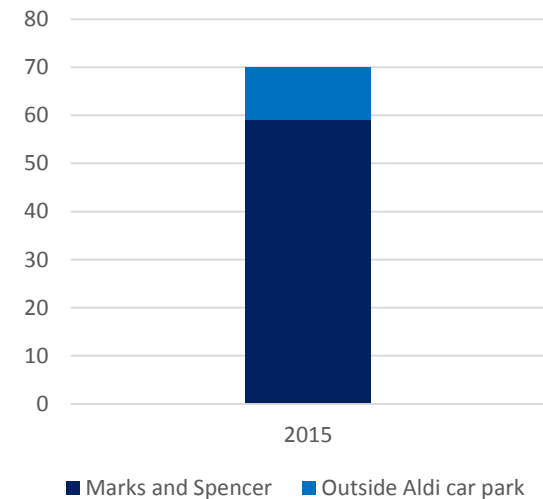
## 19.6. Westhill Pedestrian Count Analysis

Marks and Spencer in Westhill Shopping Centre recorded high footfall throughout the day – the Centre has a good range of convenience retail and professional services, and restaurants and cafes. However, as much as the results show the shopping centre is successful, it is the only place in Westhill which generates any footfall. There is little other retail in the town centre and few buildings or streets of interest. As Westhill is a new inclusion to the Health Checks, there are no scores from previous years available to show.

### Westhill Retail units



### Westhill Average Pedestrian Count 2015



# Appendix 1

## Full Scores for the 2015 Town Centre Health Checks

Categories	Indicators	Banchory	Banff	Ellon	Fraserburgh	Huntly	Inverurie	Macduff	Peterhead	Portlethen	Stonehaven	Turriff	Westhill
<b>Retail</b>	Number of Multiple Retailers	3	4	2	2	2	5	1	4	1	4	3	2
	Variety of Specialist Independent Shops	4	4	4	3	4	5	0	3	0	3	4	0
	Retailer Demand	3	2	4	1	1	5	0	3	0	5	4	1
	Diversity of Retail Uses	2	4	2	4	2	4	1	3	0	3	2	0
	Availability of Food Shopping	2	4	2	4	3	4	1	3	1	4	4	1
	Presence of Professional Services	2	5	4	4	4	4	2	3	0	4	3	1
	Sparsity of Charity & Low Quality Discount Shops	3	2	3	3	3	2	2	3	3	4	3	3
		19	25	21	21	19	29	7	22	5	27	23	8
<b>Activity</b>	Presence of Cafes, Restaurants & Pubs	4	4	3	3	3	3	1	3	0	3	3	3
	Presence of Cultural & Community Facilities	4	3	4	2	4	4	2	1	2	2	5	1
	Visitor Infrastructure	3	3	3	2	4	5	3	4	1	4	5	1
		11	10	10	7	11	12	6	8	3	9	13	5
<b>Physical Environment</b>	Quality of Open Space	2	2	2	1	3	2	4	3	2	1	4	3
	Presence of Green Infrastructure	3	1	3	1	1	3	3	1	2	1	4	4
	Appearance and Quality of Buildings	3	4	3	3	3	3	3	3	1	2	4	2
	Cleanliness and Attractiveness of Streets	4	4	3	3	3	4	3	3	2	3	3	3
		12	11	11	8	10	12	13	10	7	7	15	12
<b>Property</b>	Commercial Yield	3	1	2	1	2	5	1	3	3	3	2	4
	Sparsity of Vacant Units	4	2	5	2	3	4	1	3	4	4	5	5
	Committed Developments	4	3	2	4	3	5	2	4	1	4	1	2
		11	6	9	7	8	14	4	10	8	11	8	11
<b>Accessibility</b>	Pedestrian Footfall	4	4	2	1	5	4	0	2	1	3	4	2
	Provision of Facilities for Cyclists	3	2	1	0	3	2	0	1	3	0	2	5
	Public Transport Infrastructure & Facilities	2	3	4	4	3	5	3	3	4	4	3	3
	Ease of Movement on the Streets	4	4	3	3	3	3	4	4	3	2	4	5
	Coherence of Traffic with Pedestrians	3	4	4	3	3	1	4	4	2	2	3	4
	Car Parking	3	4	3	4	3	5	1	3	1	1	3	3
		19	21	17	15	20	20	12	17	14	12	19	22
<b>Community</b>	Attitudes, Perceptions & Aspirations	4	3	4	1	3	5	1	2	3	4	4	5
	Crime Rates	4	1	4	2	3	3	5	1	4	4	4	5
		8	4	8	3	6	8	6	3	7	8	8	10
<b>TOTAL</b>		80	77	76	61	74	95	48	70	44	74	86	68
<b>AVERAGE</b>		3.5	3.3	3.3	2.7	3.2	4.1	2.1	3.0	1.9	3.2	3.7	3.0

## Appendix 2

### A summary of the changes in indicators used in the results table to the 2015 Health Check.

The list of indicators was heavily revised from previous years in the lead-up to the 2015 health check. Scottish Planning Policy 2014 and the Town Centre Toolkit were consulted during the revision, and there was an attempt to make the results table feel more concise and relevant. The list of changes are as follows:

- 'Presence and Number of charity shops' and 'Presence and Number of Low Quality Discount Shops' were merged to 'Sparsity of Charity and Low Quality Discount Shops'.
- 'Presence of Cafes & Restaurants' and 'Presence of Pubs and Clubs' were merged to 'Presence of Cafes, Restaurants & Pubs'.
- 'Volume of Pedestrian Flows' was renamed 'Pedestrian Footfall'.
- 'Appearance of Properties', 'Evidence of Recent Investment by Retailers' and 'Quality of Buildings' were discontinued and covered in 'Appearance and Quality of Buildings'.
- 'Presence of Green Infrastructure', 'Commercial Yield' and 'Committed Developments' were added.
- 'Presence and Quality of Open Space' was revised to 'Quality of Open Space'.
- 'Overall Cleanliness' was revised to 'Cleanliness and Attractiveness of Streets'.
- 'Number of Public Transport Routes' and 'Quality of Public Transport' were merged to 'Public Transport Infrastructure & Facilities'.
- 'Vacancy rate', 'Vacant Floorspace' and 'Effect of Vacant Premises on the Town Centre' were discontinued and covered in 'Retailer Demand' and 'Sparsity of Vacant Units'.
- 'Recorded Crime' was renamed 'Crime Rates'.
- 'Evidence and Quality of a Farmers Market', and 'Feeling of Security', and 'Rental Values' were discontinued.
- Traffic Impact was renamed 'Coherence of Traffic with Pedestrians'.

Indicators recommended by Scottish Planning Policy not fully covered by the health check are Employment and Prime Rental values. Not enough relevant and concise data could be obtained to give 'Employment' a fair score. The Rating Revaluation from the SAA would have been used to help score Prime Rental Values however this was postponed until 2017 therefore only out-of-date information was available. It is considered all other recommended indicators have been covered in the health check.

## Appendix 3

### Guide to the indicators

This table gives a guide to the process of calculating scores for each indicator.

<b>Retail</b>	Multiple Retailers	Multiple retailers are taken to be both national and local/regional multiples – Tesco down to McColl’s. A sufficient number and variety of multiples to provide for the town’s population under retail types 1-22 led to a high score.
	Specialist Independent Shops	The range and quality of independent shops were observed and a high score was given for a sufficient variety of independent shops in good quality to provide for the town’s population. A high percentage of independent shops within the total number of shops also contributed.
	Retailer Demand	A high percentage of units that are occupied led to a high score. A high total number of occupied units also contributed.
	Diversity of Uses	Every shop in the town centre was noted and sorted into retail types - this data was used to provide the ‘diversity of shops’ tables in the main report. A wide variety of shops and services gave a high score.
	Availability of Food Shopping	The number of shops under retail types 1-6 was totalled and a score given based on this number, as well as the variety and quality of the food shops seen on the site visit.
	Presence of Financial + Professional Services	The number of shops under retail types 25-30 and 32 was totalled and a score given based on this number, as well as the variety and quality of the services seen on the site visit.
	Number of charity and low quality discount shops	The number of charity and low quality discount shops was totalled – a high score was given for a small amount.
<b>Activity</b>	Presence of Cafes, Restaurants + Pubs	The number of cafes, restaurants and pubs was totalled and a score given based on this number, as well as on the variety and quality of these seen on the site visit.
	Presence of Cultural + Community Facilities	The number and quality of community facilities and their state of repair were observed on the site visit to give a score.

	Visitor Infrastructure	The presence and state of repair of infrastructure which improves the experience of visitors to the town such as street signs and street furniture was noted and a score was given.
<b>Physical Environment</b>	Quality of Open Space	The open space (squares, areas of grass, other open space) was studied on the site visit and a score was given for its volume, location, and other qualities.
	Presence of Green Infrastructure	Green infrastructure (flowers, grass, trees, and plants) was studied on the site visit and a score was given for its volume, location within the town centre, attractiveness and other qualities.
	Appearance and Quality of Buildings	Buildings in the town centre were studied on the site visit and a score was given for their state of repair, layout, attractiveness, and other qualities.
	Cleanliness and Attractiveness of Streets	Streets were studied on the site visit and a score was given for their cleanliness, the presence of active frontages, pedestrian boundaries and other criteria.
<b>Property</b>	Commercial Yield	Towns were scored based on commercial yields of their retail.
	Presence of Vacant Units	Vacant units were observed on the site visit and a score was given for their quantity, volume, visual impact and other qualities. The smaller the impact, the higher the score.
	Committed Developments	Approved developments for each town were assessed and each town was scored based on the quantity and quality of new developments.
<b>Accessibility</b>	Pedestrian Footfall	Pedestrian counts were undertaken at 2 or 3 key points in the town centre and a score was given based on the results.
	Provision of Facilities for Cyclists	Cyclist facilities were observed on the site visit and a score was given based on the presence of cycle lanes, bike racks and the presence of cyclists in the town centre.
	Public Transport Infrastructure and facilities	The location and state of repair of bus stops, stations, and taxi ranks were observed and the number and quality of bus and rail routes were considered to provide a score.
	Ease of Movement on the Streets	The streets were studied on the site visit for pedestrian crossings and wide pavements among other qualities, and the towns were studied for their general permeability in order to provide a score.
	Coherence of Traffic with Pedestrians	The control of traffic was observed on site visits in order to provide a score. Factors such as speed limits, busy roads and junctions contributed. Less impact gave a higher score.

	Car Parking	The number of car parking spaces were studied on the Aberdeenshire council website in order to provide a score. Good or bad features of the town related to parking were also noted on the site visit and taken into account.
<b>Community</b>	Attitudes, Perceptions & Aspirations	A questionnaire was given to the Citizens Panel and Elected Members to obtain views on each town centre. Towns were given a score based on how people saw their town centre.
	Crime Rates	Crime rates for town centre postcodes for the past year were studied to provide a score.

Populations used to guide the scoring were taken from Aberdeenshire Council and were the most up to date available. They are shown below.

Banchory	Banff	Ellon	Fraserburgh	Huntly	Inverurie	Macduff	Peterhead	Portlethen	Stonehaven	Turriff	Westhill
7520	4020	10100	13140	4720	12760	4030	18450	8200	11370	5060	11600

## Appendix 4

### List of Retail Types

<p><b><u>Convenience</u></b></p> <p>1 - Bakers 2 - Butchers 3 - Greengrocers and Fishmongers 4 - Groceries and Frozen Food 5 - Off Licence and Home Brew 6 - CTN and Convenience</p> <p><b><u>Comparison</u></b></p> <p>7- Footwear and Repairs 8 - Mens and Boys Wear 9 - Womens, Girls and Childrens Wear 10 - Mixed and General Clothing 11 - Furniture, Carpets and Textiles 12 - Books, Arts and Crafts, Stationers, Copy 13 - Electrical, Home Entertainment, Phones and Video 14 - DIY, hardware and Household Goods 15 - Gifts, China, Glass and Leather Goods 16 - Cars, Motorcycles and Accessories 17 - Chemists and Opticians 18 - Department and Catalogue 19 - Florists and Gardeners 20 - Sports, Toys and Hobby</p>	<p>20 - Sports, Toys and Hobby 21 - Jewellers, Clocks 22 - Pets and other comparison 23 – Charity</p> <p><b><u>Services</u></b></p> <p>24 - Restaurants, cafes, hot food 25 - Hairdressing, beauty and health 26 - Launderettes/dry cleaners 27 - Travel Agents 28 - Banks and Finance 29 - Estate Agents and Auctioneers 30 - Employment, careers, post office and information 32 - Other Services</p> <p><b><u>Vacant</u></b></p> <p>31 - Vacant</p>
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## Appendix 5

### Bibliography

*Aberdeenshire Local Development Plan (2012)*. Published by Aberdeenshire Council. Available:

[https://www.aberdeenshire.gov.uk/planning/plans\\_policies/plan.asp](https://www.aberdeenshire.gov.uk/planning/plans_policies/plan.asp)

The Plan set out statements of the policies Aberdeenshire Council use for assessing planning applications and through the proposals confirms the principle of development on sites across Aberdeenshire.

*Aberdeen City and Aberdeenshire Retail Study (2013)*. Published by The Aberdeen City & Shire SDP Authority. Available at:

<http://www.aberdeencity.gov.uk/nmsruntime/saveasdialog.asp?IID=54160&SID=24188>

This document contains an enormous amount of research and information into retail centres in Aberdeen and town centres in Aberdeenshire.

*Aberdeenshire Settlements Population (2012)*. Published by Aberdeenshire Council. Available:

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*Aldi overtakes Waitrose to become UK's sixth-largest supermarket chain (2015)*. Published by The Guardian. Available:

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Scottish Planning Policy is a statement of Scottish Government policy on how nationally important land use planning matters should be addressed across the country.

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An academic study examining whether characteristics of the local food environment are associated with the prevalence of cardiovascular disease risk factors.

*The rise, fall and rise of the mini-supermarket (2014)*. Published by BBC News. Available at: [www.bbc.co.uk/news/magazine-25762466](http://www.bbc.co.uk/news/magazine-25762466)  
A BBC report giving an in-depth background to mini-supermarkets.

*Town Centre Toolkit (2015)*. Published by Scotland Towns Partnership. Available:

<https://s3-eu-west-1.amazonaws.com/stpfiles/resources/Town-Centre-Action-Plan-Masterplanning-Toolkit.pdf>

The Town Centre Toolkit was used to help plan the health check. The Town Centre Toolkit contains ideas and examples of how people and organisations can make their town centre more attractive, more active, and more accessible.

*Understanding Scottish Places (2015)*. Published by Scotland Towns Partnership. Available: <http://www.usp.scot/>

USP Scotland was used to obtain data on the demographics of the towns. Understanding Scottish Places was commissioned by the Scottish Government and was launched in April 2015. It offers a mechanism for understanding the similarity of places across Scotland.