

2010 Angus Town Centre Health Checks

REPORT OF FINDINGS (FINALISED VERSION)



Date of Surveys: July-August 2010

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1. Introduction

- 1.1 The planning system has an important role to play in supporting successful town centres, through influencing the form and type of future development. In order to assess how a centre ought to develop, evidence of its current performance is required.
- 1.2 A town centre health check is recommended as a way of analysing the factors which contribute to a successful town centre i.e. which provide a good standard of vitality and viability. Within national planning policy, the vitality of a centre is a measure of how lively and busy it is, whilst its viability is a measure of a centre's capacity to attract ongoing investment (SPP, paragraph 59).
- 1.3 A number of different indicators are relevant to determining the performance of one town centre relative to another. The 2010 health check of the Angus town centres provides results that are directly comparable between the seven towns, for a variety of different indicators (see section 2: Synopsis of Methodology).
- 1.4 The 2010 town centre health checks are the first of their kind for the Angus town centres and will therefore be used to set a baseline for future health checks. More specifically, the results from this study will be used in monitoring and formulating future development plan policies and strategy. They also provide a useful source of information for various Council service departments; for preparing grant applications; and for establishing the requirement for, and the purpose of a Town Centre Strategy. Such a document would help to co-ordinate the delivery of improvements in a town centre, within the context of the development plan (SPP, paragraph 60).
- 1.5 This report compares the seven town centres in terms of the indicators that have been used, before summarising these findings and drawing conclusions on the strengths, weaknesses, opportunities and threats for each town centre. There is no final ranking of the town centres as this could disguise particular failings regarding the vitality or viability of a centre.
- 1.6 Whilst many of the health check results are presented or discussed in sections 3-8, some of the data has only been included within appendices to this document. Where references are made within the text, these appendices should be considered in conjunction with this report.

2. Synopsis of Methodology

- 2.1 The methodology used for the 2010 town centre health checks was devised to provide meaningful and comparable results for the seven Angus towns. The town centres in question are those defined by the Angus Local Plan Review (adopted 2009), for Arbroath, Brechin, Carnoustie, Forfar, Kirriemuir, Monifieth & Montrose.
- 2.2 The following indicators, all of which are mentioned within national planning policy, were considered within the 2010 study:
- Pedestrian flow (footfall)
 - Space in use for different town centre functions
 - Retailer representation
 - Vacancy rates
 - Physical structure of the centre
 - Accessibility
 - Crime levels
- 2.3 The health checks were based on the review of data collected from on-site surveys for each of the seven town centres. This data was supplemented by information from a variety of secondary data sources (e.g. Tayside police statistics of recorded crime, published bus and rail timetables, data from Angus Council's Retail Floorspace Survey 2009). The data sources that have been used within the study are acknowledged where appropriate, within the following sections of this report. Unless otherwise specified beneath the graphs or tables of data, the source of the following information is the 2010 Town Centre Health Check survey (Angus Council).
- 2.4 All surveys were undertaken during the school holidays (July-August 2010) and involved staff from Planning & Transport. Surveys involved a single visit to the town centre, to record information on pedestrian flow, use of floorspace, retailer representation and the physical environment. Brief details on how this information was gathered are given at the start of the relevant sections.
- 2.5 The method used for the surveys and for the subsequent analysis of data was that prescribed by Forward Planning's Town Centre Health Checks Statement of Methodology (July 2010). This statement of methodology informed the study throughout; however, where alternative actions were found to be preferable, the methodology was not implemented. In particular, the identification of floorspace on first and second floors proved difficult with regard to residential use. Pre-existing information from Planning & Transport's Uniform database was therefore used to identify the number of residential properties within town centres.

3. Executive Summary

- 3.1 This report provides details of the first Angus town centre health checks, which were undertaken for the seven Angus towns during the summer of 2010. Town centre health checks provide an analysis of the factors which contribute to a successful town centre and allow a comparison between the health of different town centres in terms of their vitality and viability. The vitality of a centre is a measure of how lively and busy it is, whilst its viability is a measure of a centre's capacity to attract ongoing investment (SPP, paragraph 59).
- 3.2 The seven Angus town centres serve a variety of different functions, and differ from one another in terms of their physical size, layout, topography and character of the built environment. Town centre boundaries are defined in the Angus Local Plan Review (adopted 2009) (ALPR) and will be reviewed taking into account the findings of the 2010 town centre health checks. The conclusions for each of the indicators studied in the 2010 town centre health checks are as follows:

Physical structure & retailer representation

- 3.3 Kirriemuir and Montrose town centres have a high quality built environment, with a strong visitor appeal. The town centres of Arbroath, Carnoustie and Forfar have various strengths and weaknesses, with shopper accessibility being relatively good in Arbroath and Carnoustie, and the historic architecture of central Forfar creating a distinctive "sense of place". The built environments of Brechin and Monifieth town centres have significant weaknesses, relating to the layout and appearance of buildings in the town centre (Monifieth) or the shopper accessibility and desirability of spending time in the core area (Brechin).
- 3.4 There are clear differences in the nature of retailing within each of the seven town centres. Brechin, Carnoustie and Kirriemuir have a relatively high proportion of specialist independent retailers, whilst Arbroath, Montrose and Monifieth have a higher proportion of discount stores and charity shops. It appears that Forfar has the most balanced retail profile of the seven town centres, in terms of having a mix of shops selling low-value and high-value products, and a variety of local and national retailers.

Pedestrian counts

- 3.5 During August 2010, Arbroath and Montrose appeared to be the busiest of the Angus town centres in terms of pedestrian traffic. Forfar appeared to be slightly less busy, but recorded a greater footfall than the other remaining town centres. In Brechin and Monifieth, some areas of the town centre were noticeably less busy than others. For Brechin, the core area (around the Mercat Cross) was particularly quiet.
- 3.6 Future town centre health checks should pay close attention to pedestrian counts in Kirriemuir & Carnoustie, to determine whether the low results in 2010 are anomalies, or whether these towns are usually quiet during the summer holiday period.

Use of floorspace

- 3.7 Arbroath and Montrose town centres have a relatively good balance between shops and services such as hairdressers, restaurants and takeaways. Forfar and Carnoustie have a larger number of service uses than retailers, and there are high concentrations of particular uses in these town centres (e.g. there are a large number of hairdressers in Forfar). Both Monifieth and Carnoustie have a high concentration of convenience shops selling food and drink.
- 3.8 Within Brechin and Kirriemuir town centres, there are often only one or two businesses within a particular retail or service category. This means that the availability of goods and services could be severely affected by the closure of just a few businesses. Generally speaking, there is close connection between the number of properties in use for commercial purposes and the number of residential properties within a town centre, with a greater number of homes corresponding with a greater number of retailers and service providers.

Vacancy rates

- 3.9 Brechin has the highest vacancy rate of the seven Angus town centres as a proportion of all commercial uses (retail, office, service and leisure uses). The greatest number of vacant commercial units was however observed in Arbroath, which has a relatively high vacancy rate along with Kirriemuir town centre.
- 3.10 Monifieth and Forfar town centres have a low rate of vacant commercial units in comparison with the other town centres, whilst Montrose and Carnoustie have similar vacancy rates to one another but these do not register as being particularly high or low. For towns that have defined core areas, Kirriemuir has the highest rate of vacant units, with Forfar and Montrose having the lowest. For purposes of monitoring Policy SC24: Core Retail Areas of the ALPR, it is noteworthy that only Forfar core area had a vacancy rate of less than 5% in August 2010.

Crime levels

- 3.11 The greatest number of crimes (2008-2009) occurring within town centres, which have (for the purposes of this study) been classed as relevant to vitality and viability, were recorded in the three largest town centres of Arbroath, Forfar and Montrose. In particular, levels of shoplifting in 2008 and 2009 were noticeably lower in Brechin, Carnoustie, Kirriemuir and Monifieth than in the larger centres. Levels of vandalism in Brechin and Kirriemuir were however comparable to those for the larger town centres.
- 3.12 Between the larger town centres, differences between the overall levels of crime (2008-2009) were generally small; although Arbroath town centre had approximately double the number of recorded shoplifting incidents to Forfar town centre. Monifieth town centre had the lowest levels of recorded crime over the period 2008-2009, although levels were also low within Carnoustie.

Accessibility

- 3.13 The three largest town centres also have the largest number of bus services. Services from Arbroath, Forfar and Montrose town centres also connect with a larger number of places (other towns, villages and small settlements) than services from Brechin, Carnoustie and Monifieth town centres. Kirriemuir

appears to be the most well-connected of the smaller town centres, although access by train is possible for Carnoustie and Monifieth.

- 3.14 Arbroath has the largest number of train services per day (Monday-Saturday), with Carnoustie & Montrose also being well served. There is only an infrequent train service connecting Monifieth with other areas. Other town centres are not connected via the rail network.
- 3.15 In terms of parking provision, Forfar town centre has the largest share of Angus Council-operated off-street car parking, followed by Arbroath. Privately-operated car parks also supplement parking in and adjoining the town centres of Arbroath, Carnoustie, Kirriemuir and Montrose, although these are often reserved for customer use. In Monifieth town centre, all off-street parking is privately-operated.

Conclusions: key findings

- 3.16 As may be appreciated from the above, the seven town centres are diverse in character and each one has its own particular strengths and weaknesses. Detailed conclusions to the 2010 town centre health checks are presented for each town centre in the form of SWOT analyses, which may be found in section 9 of this document. In addition however, a number of broad conclusions can be drawn that relate to more than one town centre.
- 3.17 The town centres of Strathmore (i.e. Forfar, Kirriemuir & Brechin) tend to provide a more distinctive range of shops and services, with more specialist independent retailers than the coastal town centres. In the case of Arbroath and Montrose, these centres are a focus for the national multiples such as Argos and WH Smith.
- 3.18 The largest town centres of Arbroath, Forfar & Montrose tend to be the most well-connected; appear to be the busiest; and have the largest residential populations. These results are reasons to think that the larger town centres will be more resilient to the economic downturn and to changes in the nature of retailing brought about by the rise of internet shopping. However, differences in vacancy rates indicate that commercial viability appears to be strongly influenced by factors that are specific to a town centre (e.g. the condition of the available properties and the general nature of the built environment). Socio-economic factors (e.g. the relative affluence of potential customers) may also play a part, although these factors have not been directly considered as part of this study.
- 3.19 For the smaller centres of Brechin, Carnoustie, Kirriemuir and Monifieth, the results show that it is important to recognise the fragile nature of the town centre as a place where a diverse range of activities can occur. For Brechin and Kirriemuir town centres, it is particularly noticeable that diversity in the range of goods and services is heavily dependent on the continuing existence of individual businesses.

4. Town centres in profile

Background information on the methodology

- 4.1 Each of the seven town centres was surveyed in terms of a range of qualitative indicators, to give an impression of the physical structure of the centre.
- 4.2 Officers noted their thoughts on matters such as the cleanliness of the public realm, the quality of built heritage and the ease of movement for pedestrians (see Appendix 1). A discussion of these indicators was then used to arrive at a mutually agreeable score (1-5; 1: poor, 5: excellent), which was used to derive a ranking of town centres, solely with regard to that indicator. Consistency in judgement was maintained by re-scoring a centre if it became apparent that a different score had been awarded elsewhere, when identical opinions had been recorded. No averages or totals were calculated: the score is only the expression of a qualitative judgement and does not have the status of a quantitative measure ('5' for one indicator need not be equivalent to '5' for another).
- 4.3 The number of national multiples, discount stores, charity shops and specialist independent retailers were also recorded by officers, through the on-site visual survey of floorspace use. The category of specialist independent retailers was defined as shops that 1) sell products that is/are unique in terms of their quality, style or purpose, relative to other retailers in the centre; 2) sell high-value products; and 3) would constitute a reason for visiting the centre (may be considered as a destination in their own right). Discount stores are those that sell low-value items and market these items as being value for money, or very low cost. A national multiple is a unit occupied by a retailer or service provider that has outlets across Scotland or the U.K.

Comparison of the seven town centres

- 4.4 The seven town centres serve a variety of different functions, and differ from one another in terms of their physical size, layout, topography and character of the built environment. The towns of Carnoustie and Monifieth are located within the Greater Dundee Housing Market Area and it appears likely that the proximity of Dundee has affected the economic and therefore the physical development of their town centres. By contrast, both Forfar and Montrose serve large rural areas and this is reflected in the diversity and nature of the shops and services which are present within the town centres. Whilst some of the historic centres are relatively compact (e.g. Brechin and Kirriemuir), this is not always the case, with Arbroath's long elongated town centre connecting the harbour to the abbey.
- 4.5 Each town will naturally serve a different population, although the character of the seven towns as part of an interrelated network is recognised within the Angus Local Plan Review. Table 1 gives details of the resident population of the seven towns. The town centres may each be expected to draw custom and provide services for their resident populations:

Table 1: Mid-year population estimates, 30 June 2009

	Arbroath	Brechin	Carnoustie	Forfar	Kirriemuir	Monifieth	Montrose
Estimated Population (all ages)	22294	6458	10258	13163	5780	8033	11240

Source: Small Area Population Estimates, Angus Council (based on Scottish Government Neighbourhood Statistics).

- 4.5 As might be expected, there are a number of qualitative differences between the town centre environments, many of which are briefly described in Table 2 (following page). Appendix 1 provides full details of the qualitative assessments for the town centres, and describes those characteristics which have been of as noteworthy. These characteristics may affect the vitality of particular town centres, but they also provide indications of the town centre's viability (i.e. whether it continues to attract new investment). Important findings are discussed below, after the table.

Table 2: Overview of results to the on-site surveys of the seven town centres

Qualitative indicators									
	Overall cleanliness	Property appearance, condition & maintenance	Quality of built heritage	Evidence of recent investment by retailers	Availability & quality of visitor infrastructure	Presence & quality of open space	Ease of movement for pedestrians	Access to/from/within the centre	Availability of food & drink facilities
Which towns scored well (4 or 5)?	Kirriemuir (5); Brechin, Carnoustie, Monifieth & Montrose (all 4)	Montrose (4)	Kirriemuir (5); Montrose (5); Brechin (4); Forfar (4)	Forfar, Kirriemuir & Monifieth (all 4)	Kirriemuir (5); Arbroath, Forfar & Montrose (all 4)	Kirriemuir (4); Montrose (4)	Arbroath, Carnoustie & Montrose (all 4)	Carnoustie (5); Arbroath, Forfar, Kirriemuir, Monifieth & Montrose (all 4)	Forfar (5); Montrose (5); Brechin (4); Kirriemuir (4)
Which towns scored badly (1 or 2)?	None	Arbroath (2); Brechin (2)*	Monifieth (2)	None	Brechin (2); Carnoustie (2)	Brechin (2)	None	None	None
What were the main differences between the town centres?	Town centres that scored less than 4 (Arbroath, Forfar) had increased levels of chewing gum, cigarette butts and detritus.	Town centres that were judged satisfactorily (i.e. scored 3) contain properties requiring some attention (re-painting of design details, fixing of broken windows). Those that scored lower than this contain a greater number of these buildings, or they were more noticeable throughout the centre.	The extent of an attractive, historic built environment varies across the centres. Monifieth contains only a few noteworthy properties. Arbroath & Carnoustie have noticeable areas of modern unsympathetic development.	Those towns which scored well featured a number of shops or commercial premises being refurbished, and/or with 'coming soon' notices. Brechin, Carnoustie & Montrose demonstrated a turnover or reconfiguration of units, rather than an observed rehabilitation of vacant premises.	The lack of infrastructure (benches, appropriate signage) and/or its poor quality are noticeable features of Brechin & Carnoustie town centres. The quality and/or convenience of visitor facilities are better for other centres.	Attractive, centrally located areas of public space, which are also well-used, were noted in Montrose & Kirriemuir. In Forfar, recent improvements are counterbalanced by Little Causeway's lack of presence. A lack of functional open space was observed in the Brechin core area.	Changes in the width of pavements, topography and levels of traffic meant that some town centres scored less well than others. Forfar, Kirriemuir & Brechin town centres were thought more difficult to move around for the first two reasons. Traffic levels in Monifieth were noticeable.	Most of the town centres were judged highly for this indicator, because of on- and off-street parking, and the presence of bus stops in convenient locations for the shops. Carnoustie scored highest because of the lack of steep gradients and its rail connections. Abrupt changes in gradient, and linkages between car parks & the centre meant Brechin scored less well than other centres.	The presence of a wide range of food & drink facilities for a variety of different needs meant that both Forfar & Montrose scored highly against this indicator. The distribution and number of facilities in Brechin & Kirriemuir contributed to their high score. The relatively large number of takeaways only open during the evening was judged to be a drawback in Monifieth & Carnoustie.
Any findings worthy of particular attention?	In general, standards of cleanliness for the public realm were high. Even the busier and larger centres (Arbroath, Forfar, Montrose) were not dirty and the streets were largely rubbish-free.	Some of the historic buildings in Arbroath town centre were dirty and showed signs of water damage (relating to lose guttering/down pipes). Also, quality of shop fascias and signage was generally low for all town centres. Carnoustie town centre would have scored 2 (unsatisfactory) if the poorer quality developments at the westernmost part of the High Street had been representative of the whole.	The use of local stone, building forms synonymous with the town (e.g. gable-fronted properties in Montrose) and the presence and attractiveness of visual landmarks characterises many of the town centres. Details such as the design and colour of shop fascias and quality of paving may detract from visitor experiences.	A number of units within Brechin (at the top of the High Street) have recently changed retail use or retailer. The same is true of Arbroath; although in both centres there remain a relatively high vacancy rate.	The public conveniences in Carnoustie were uninviting and poorly located. The superloo does not adequately address these failings. There are no benches within the core area of Brechin town centre. Forthcoming improvements to the public realm will help redress deficiencies in Monifieth.	Although there are areas of public open space on the periphery of Carnoustie town centre, the High Street itself lacks a focus for activity. The pedestrianised area of Arbroath provides incidental areas to linger, but was not thought inviting as a place to dwell (unattractive development).	The lack of rear servicing for retail units in Brechin (particularly on St David Street) was observed to hinder the movement of traffic and make crossing the road more difficult for pedestrians. The historic pattern of development often has effects on pedestrian movement (narrow pavements, sharp corners).	The closes of Montrose, Brechin & Kirriemuir enhance permeability, although their quality is variable. Some in Brechin are uninviting; and in general it is often unclear which are public and which are private means of access.	In neither Brechin nor Monifieth is there anywhere to linger within the public realm, to consume purchases. Aside from several cafes, Arbroath town centre does not provide many options for families at lunchtime.

*Please note that the Brechin Townscape Heritage Initiative and the funding secured from the Town Centre Regeneration Fund will be used to improve the appearance of buildings within Brechin town centre.

- 4.6 Overall, two of the seven town centres consistently scored high marks in terms of the physical environment and the effects this may have on vitality. These were Kirriemuir and Montrose. The high quality of the built environment; the presence and quality of visitor infrastructure; the prominent use of open space; and the relative ease of access to shops and services provide visitors with a good impression of these town centres.



Images of the town centres in Kirriemuir (left) & Montrose (right)

- 4.7 Whilst none of the centres scored badly against all of the indicators, Brechin and Monifieth town centres were judged to demonstrate a variety of weaknesses. For Monifieth, the poor quality of development on the southern side of the High Street – the lack of a building line, the lack of enclosure to the public realm, and a purely functional design – is particularly noticeable. A relative lack of visitor infrastructure (e.g. benches, payphones, cycle storage) and the intrusive nature of vehicular traffic may also limit the appeal of the town centre; although improvements that are being undertaken by Angus Council should help to address the first of these matters.
- 4.8 Although the heritage of Brechin is clearly a recognisable asset of the town centre, some of the buildings are currently in a state of disrepair and this is likely to make a poor impression on the visitor. As mentioned in the footnote to Table 2, the Townscape Heritage Initiative and projects funded by the Town Centre Regeneration Fund will help to improve the condition of several important buildings within the town centre, to help address this concern.
- 4.9 While Brechin town centre has many of the required visitor amenities, such as public toilets and bins; there is nowhere for visitors to linger and outwith the core area, there is little pedestrian signage. The closes provide interesting routes between different areas, but some are uninviting and/or not obviously for public use. Other issues include the lack of rear servicing for retail units, which noticeably affects pedestrian and vehicular movements within the centre during deliveries; and the lack of suitable linkages for the less mobile between the car park at Maisondieu Lane and the town centre.



Images of the town centres in Brechin (left) & Monifieth (right)

- 4.10 With regard to the remaining towns, Carnoustie town centre could be improved by raising the quality of the public toilets and by altering the physical structure, to draw visitors from the nearby beach and golf courses. Although Arbroath town centre has a large quantity of useable public space (by virtue of the pedestrianised area), the quality of the buildings is generally lower in this area and there is little incentive to linger. In the more attractive areas, a number of the historic buildings also appear to have been neglected. In the case of Forfar, ease of pedestrian movement along Castle Street (and at its junction with East & West High Streets) is reduced by narrow pavements and abrupt corners.
- 4.11 The positive aspects of these three towns also deserve attention. Access to, from and within Carnoustie town centre is generally very good, creating an environment that is quite easy to move around for pedestrians. Similarly, Arbroath town centre is easily accessible and (generally speaking) pedestrian friendly. For visitors to Forfar town centre, the high quality of the built environment and the presence of important civic buildings add interest, and this centre also provides a good range of visitor facilities, including a wide variety of food & drink establishments.



Images of town centres in Forfar (top left), Arbroath (top right) & Carnoustie (bottom centre)

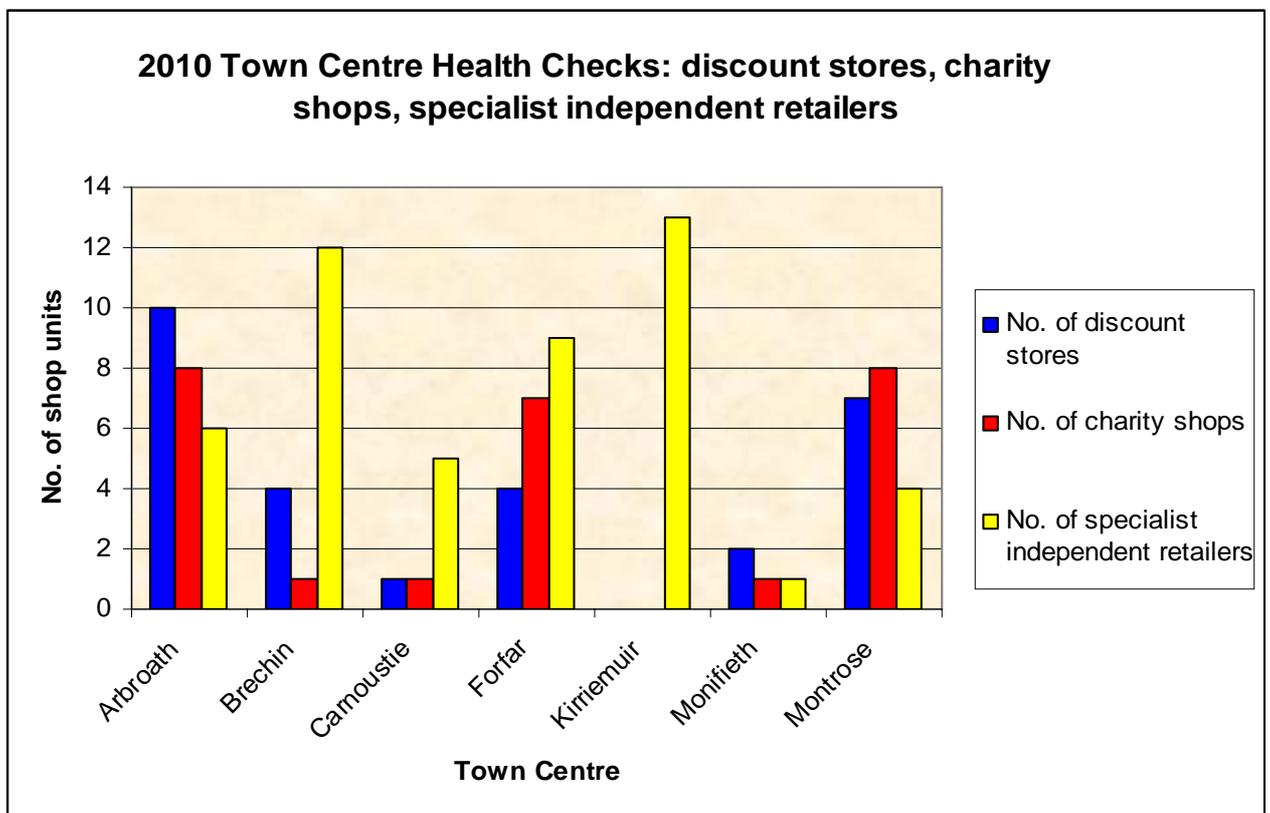
- 4.12 A comparative profile of the town centres may also be obtained by considering the different types of shop that are present in each town centre. Although a high number of charity or discount shops does not necessarily suggest that a town centre is struggling¹, the preponderance of both and a lack of other store types (national multiples, specialist independent retailers) does suggest a lack of diversity in the products on offer i.e. a relative lack of higher value goods. It

¹ Scottish Government research on Town Centre Retailing & Methodologies highlights that charity shops can often afford market rents and compete with other high street retailers, on the basis of their reduced costs, achieved through the use of volunteers and the sale of donated goods. Similarly, certain discount retailers are highlighted as being very successful national businesses, achieving high sales densities (Hargest & Wallace (Final Report): p.107).

is therefore worth reflecting on the data collected for the different types of shop present in the seven town centres.

4.13 Figure 1 shows the number of discount stores, charity shops and specialist independent retailers for each of the seven town centres. From this graph, it is clear that there are marked differences in the number of these stores, often reflecting the town centre's function. There is, for example, only one specialist independent retailer in Monifieth (MGR cycles) which reflects its emphasis on convenience goods and services, due to its historical development as a suburban extension to Dundee. By contrast, there are 13 specialist retailers in Kirriemuir, providing luxury items such as unusual floral displays, confectionary, engraved glass and carved stone items, paintings and prints. This partly reflects the image of Kirriemuir as a destination for leisure & tourism, being the "gateway to the glens".

Figure 1: Graph to show the number of discount stores, charity shops and specialist independent retailers by town centre



Note: Figure 1 does not include all of the shops that are present in the Angus town centres, but only those which fall into one of the three categories of discount stores, charity shops and specialist independent retailers. For this reason, the total number of shop units for each centre cannot be calculated from this graph.

4.14 To gain a more detailed picture of the different types of shop present in each centre, it is worth considering the above numbers in view of the total number of retail units. Pie charts showing the proportion of discount stores, charity shops, specialist independent retailers and other retail types are given at Appendix 2. These pie charts show that Arbroath, Montrose and Monifieth have a far higher proportion of discount stores & charity shops than specialist independent retailers; the reverse is true of Brechin, Carnoustie & Kirriemuir. In all cases however, there remains a large proportion of other retail types. When the

number of non-charity and non-discount national multiples are also taken into account (see Figure 2, Appendix 2), it appears that none of the seven town centres are dominated by shops which are expected to sell low-value goods.

- 4.15 There are however some conclusions that can be drawn from the comparison of the seven town centres. The choice of items provided within Arbroath and Montrose is more dependent on the presence of national multiples than is the case for Forfar and the smaller town centres of Brechin, Carnoustie, Kirriemuir & Monifieth. Moreover, retailing in Arbroath provides the greatest concentration of charity & discount stores of the seven town centres, closely followed by Montrose. When taken together, these facts suggest that both Arbroath & Montrose are different in character to the other Angus town centres, being less distinctive in terms of those retailers which provide higher value, or unusual and therefore often specialist goods.
- 4.16 With regard to other town centres, both Brechin & Forfar show interesting results. Within Brechin, there is a large number of local retailers yet few national multiples or charity shops. This may reflect a perception of low commercial viability on the part of regional and national retailers, leaving opportunities for local businesses; or it may reflect the close proximity of Montrose and the perception that Brechin is part of its retail catchment.
- 4.17 Turning to Forfar, it is noteworthy that whilst there is a high number of charity shops & discount stores (taken together), there is also a high number of specialist independent retailers. Whilst other town centres either have a relatively high proportion of specialist independent shops or national multiples, Forfar has a similar proportion of each. Overall, it appears that Forfar has the most balanced retail profile of the seven towns, solely in terms of the aforementioned categories (see Figure 2, Appendix 2).

Summary of the town centres in profile

The physical environment may create reasons to visit, or even reasons to avoid a town centre. In addition, a centre which is synonymous with particular types of shops is unlikely to attract a diverse range of potential customers, but may gain a desirable or undesirable reputation. Observations on the environment and the retail offer of the seven Angus town centres revealed the following:

- **Kirriemuir & Montrose** town centres have a high quality built environment. The high quality and noticeable presence of visitor facilities, including open space, and the relative ease of access to shops and services are important characteristics. Both of these towns have a strong visitor appeal which may have helped to prioritise investment in the town centre environment.
- **Brechin & Monifieth** town centres have various weaknesses in terms of the nature of the built environment. In **Monifieth**, the lack of a clear building line and enclosure to the public realm, together with the purely functional design of existing commercial uses, may create a negative impression. In **Brechin**, visitor facilities do not encourage pedestrians to linger in the core area, and their movement may be significantly hindered by parked delivery vehicles & unsuitable linkages.
- The town centres of **Arbroath, Carnoustie** and **Forfar** have various strengths and weaknesses. Positive aspects include pedestrian accessibility (**Arbroath & Carnoustie**) and the historic architecture (**Forfar**); whilst negative aspects include the low quality of public conveniences (**Carnoustie**), difficulties in moving through the town centre (**Forfar**) and the low quality of some of the modern retail development (**Arbroath**).
- There are clear differences in the nature of the retail offer within each of the seven town centres. **Brechin, Carnoustie** and **Kirriemuir** have a relatively high proportion of specialist independent retailers, whilst **Arbroath, Montrose** and **Monifieth** have a higher proportion of discount stores and charity shops.
- None of the seven town centres are dominated by discount stores and charity shops i.e. those which may be expected to sell low-value goods.
- Within **Arbroath & Montrose**, a relatively small proportion of the retail units are occupied by local retailers selling high-value goods. This means that the retail offer in these town centres is less distinctive than for the other Angus towns.
- It appears that **Forfar** has the most balanced retail profile of the seven town centres, in terms of the mix of shops selling low-value and high-value products, and the proportion of national multiples (see Appendix 2).

5. Pedestrian Counts

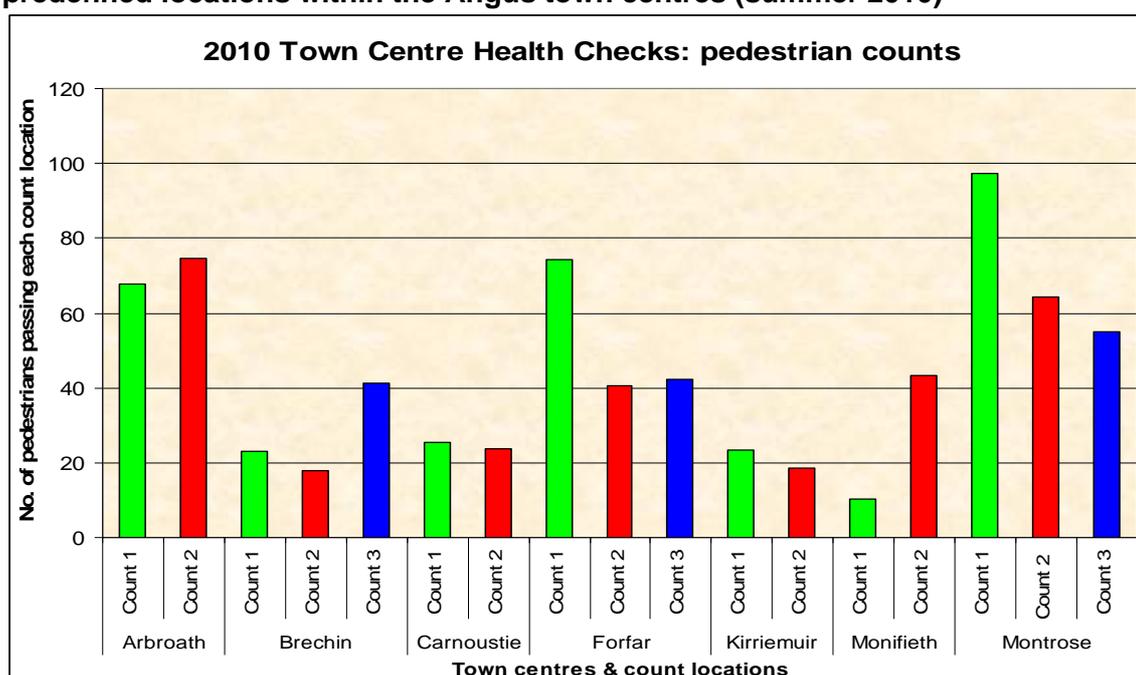
Background information on the methodology

- 5.1 Counts were taken of the number of pedestrians passing by several predefined locations in each town centre, at three different times during the health check surveys. The number of count locations depended on the layout of the centre and the anticipated arrival and departure points. Each centre had a minimum of two pedestrian count locations, one of which was always located in the core area or near to the centre of activity for the town centre.
- 5.2 Officers counted the number of passers-by for a period of five minutes at 11.00, 12.00 and 13.00. An average (mean) for each count location was determined from these three pedestrian counts. Any unusual circumstances or noteworthy facts were also recorded at the time of the count, to aid interpretation of the findings. The timings were chosen to allow the lunchtime trade to be represented, but also counterbalanced by measurements for another period of the day.
- 5.3 In the case of each town centre, pedestrian counts refer to a single mid-week day (Tues-Thurs) in the summer school holidays. Early closing days were avoided. They are only indicative of pedestrian levels at this time of year and during this time of the week, and have been interpreted with caution because they only represent findings on the day of the survey.

Comparison of the seven town centres

- 5.4 Figure 2 gives details of the average pedestrian counts at the different count locations within the seven town centres. As can be seen from this graph, the larger centres were (as expected) busier than the smaller ones. In both Arbroath & Montrose, relatively high numbers of pedestrians were recorded at all count locations; even though it was raining during the third count in Arbroath.

Figure 2: Graph to show the average (mean) number of pedestrians passing predefined locations within the Angus town centres (summer 2010)



- 5.5 These averages also show the relative busyness of different areas within a town centre. Whilst some areas were found to be quiet, others could be quite busy. This was particularly the case for Brechin, where levels of footfall in the historic core (on the High Street) were not as high as levels on St David Street & Swan Street/Clerk Street. Equally, there was a great disparity between the chosen locations in Monifieth town centre (as can be seen from Figure 2), where quite a large number of pedestrians were observed close to Tesco and the parade of shops, but relatively few close to the library (both locations on the High Street). This shows the ability of edge of centre retailing to alter the balance of shopper activity.
- 5.6 For the larger centres, it is noteworthy that in both Forfar and Montrose, one of the count locations was busier than the others. In the case of Forfar, a location on Castle Street recorded higher levels of pedestrian footfall than either of the locations on East or West High Street. This is unsurprising, given that the Castle Street pedestrian count is located within the core area; whereas the others are not. In the case of Montrose, the most central of the three count locations recorded the highest number of pedestrians within the town centre and in fact of any of the locations across the seven Angus towns.
- 5.7 Relative to other town centres, average pedestrian counts for Kirriemuir and Carnoustie were quite low. This agrees with the general perception held by officers involved in the surveys, that these town centres seemed quiet. It should however be recalled that the results correspond to just a single day, which may have been quieter than usual in the case of these towns.
- 5.8 Two broad conclusions can be drawn on the basis of the foregoing. Firstly, the three largest centres (Arbroath, Forfar & Montrose) are likely to be the busiest of the Angus town centres over the summer holiday period; this is not just in terms of the overall number of visitors, but also the number of visitors within the core areas (i.e. within the very centre of the retail environment). Secondly, there are likely to be areas within the town centres that are less busy than others; and whilst these are usually on the periphery of the core area, this may not always be the case.

Summary of the pedestrian counts

The presence of a large number of visitors within a town centre is an expression of its vitality, and also contributes to its viability through creating the potential for passing trade. Pedestrian counts revealed the following:

- During August 2010, **Arbroath** and **Montrose** appeared to be the busiest of the Angus town centres in terms of pedestrian traffic. **Forfar** appeared to be slightly less busy, but recorded a greater footfall than the other remaining town centres. It seems likely that the three largest towns will have the busiest town centres over the summer holiday period.
- Within some of the town centres, there were marked variations in the relative busyness of different areas. In particular, the core area of **Brechin** was noticeably quieter in terms of the number of pedestrians, than St David Street and the corner of Swan Street & Clerk Street. In **Monifieth**, the area around the library was quieter than areas close to Tesco.
- Future town centre health checks/retail surveys should pay close attention to pedestrian counts in **Kirriemuir & Carnoustie**, to determine whether the low results in 2010 are anomalies, or otherwise significant of typical pedestrian levels during the summer holiday period.

6. Use of Floorspace

Range of Uses

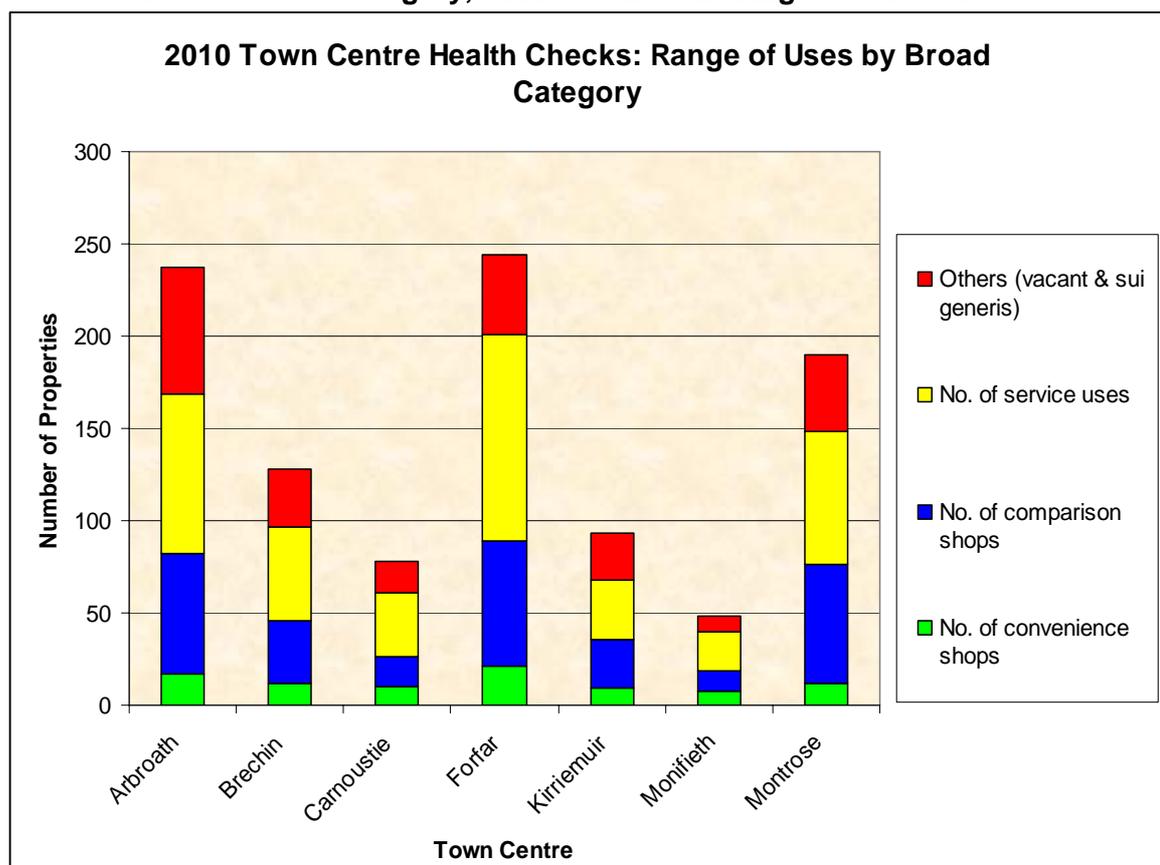
Background information on the methodology

- 6.1 General retail categories (those used in Angus Council's Retail Floorspace Survey (RFS)) were used to describe the types of retail and service units present within each of the seven town centres. Officers were asked to record the name and retail or service type of each shop unit or business premise, on the basis of a walk-round survey. It should be noted that the use and quantity of floorspace within Angus towns is also recorded through the RFS; although the most up-to-date version (2009) does not include any recent changes in use, RFS data on the quantity of floorspace was considered as part of the health checks. As such and for sake of consistency with the RFS, officers were only permitted to suggest changes in the category already assigned to a property, if it would have been unreasonable to continue with the RFS results; or if a change in use had obviously taken place.
- 6.2 As part of a desk-based analysis, the results were further grouped into the following broad categories: convenience retailing (which includes shops for the purchase of food, alcohol, news & magazines); comparison retailing (which includes shops for the purchase of clothes, electronic goods); service uses (business, leisure and uses ancillary to retail); others (vacant and sui generis). This grouping allows general conclusions on the use of floorspace to be derived, in addition to more detailed views on the range of uses by particular type (e.g. hairdressers, restaurants, pound shops).

Comparison of the seven town centres

- 6.3 The distribution of uses (by broad category) within each of the seven town centres is shown in Figure 3 (next page). This graph shows that within each town centre, a large number of commercial properties are used to provide services for the general public, for businesses or both. Within Forfar and Carnoustie, service uses (which include hairdressers, restaurants and takeaways) predominate to an obvious degree; by contrast, there is a more even distribution of commercial uses within the town centres of Montrose and Arbroath. It should be noted that the 'other' category includes vacant properties; for the trends in vacancy rates see paragraph 6.17 onwards.
- 6.4 With regard to the distribution of uses within these categories, graphs showing the range of shops and services by town centre are included within Appendix 3. A review of these graphs shows that there are concentrations of particular retail and/or service uses within some of the town centres.
- 6.5 For example, within Forfar there is a large number of hairdressers relative to all other retail and service categories. For shops which fall into the category of comparison goods (i.e. which sell durable goods to consumers), there is an emphasis on the sale of clothing and footwear. By contrast, within Monifieth and Carnoustie town centres, shops and services which provide food and drink (e.g. supermarkets, bakeries and restaurants) account for the largest proportion of all commercial units.

Figure 3: Graph to show the proportion and number of commercial units by broad retail and service category, within each of the Angus town centres

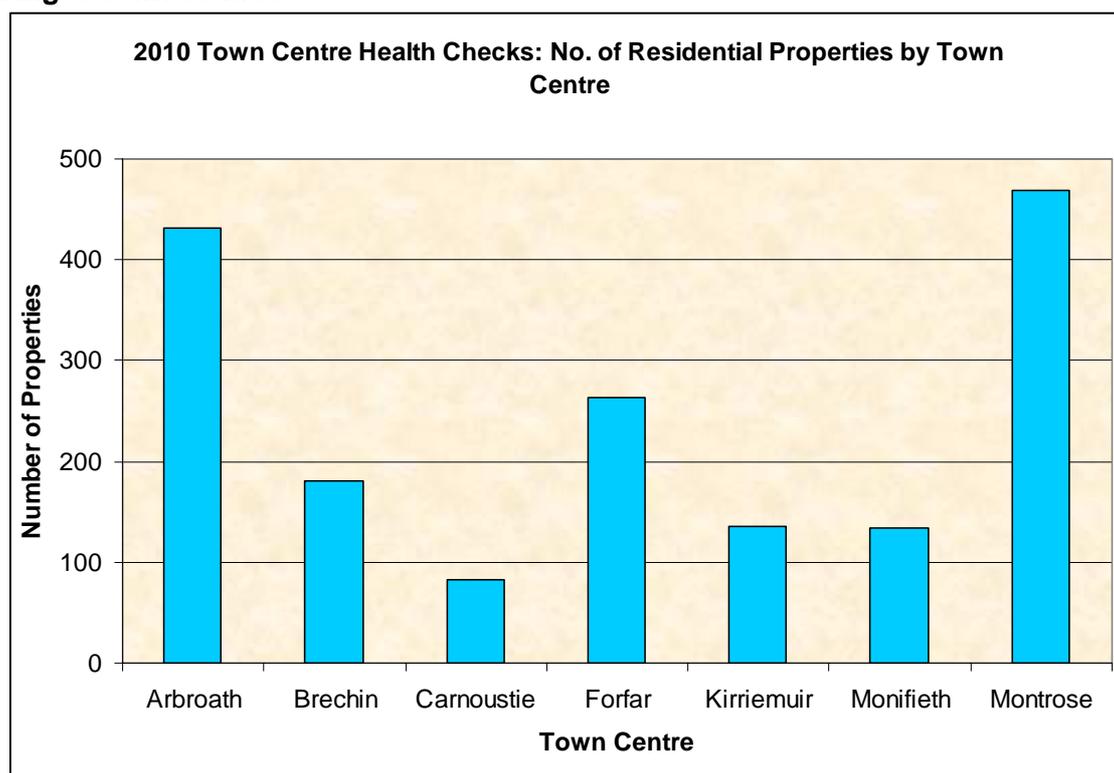


- 6.6 The number and presence of individual types of shops and services varies depending on the function or size of each town centre. Within Arbroath, there is a high degree of variability, with numerous shops in some categories (e.g. clothing & footwear, food & drink, public houses), but relatively few in others (e.g. books, takeaway food, restaurants). This shows that an even distribution of shops and services by broad category (paragraph 6.3) can still mask disparities in high street representation. It should however be noted that a proliferation of shops and services in neighbouring areas can be responsible for the relatively low levels of retailer representation within a town centre; for example, in Arbroath the takeaway food outlets and restaurants around the harbour area are likely to contribute to the lack of these businesses within the defined town centre.
- 6.7 For Brechin town centre, it is noteworthy that many of the retail and service categories are represented by only one or two businesses. Whilst this fact undoubtedly reflects the small size of the town, it also emphasises that the diversity of uses which make up the town centre could be severely affected by the closure of just a few of the existing businesses. The same is true in Monifieth & Carnoustie, where there are very few shops selling durable (comparison) goods. Within Kirriemuir, a relatively high proportion of the shop units are occupied by specialist independent retailers (see Figure 1), which means that the space available for other types of shop is restricted. As a result, many of the survey categories (e.g. hardware & DIY supplies, furniture, footwear) are represented by just a single retailer or service provider.
- 6.8 Within Forfar, there is a diverse range of food & drink services and a relatively large number of restaurants, takeaways and cafes. As mentioned above, there are also many hairdressers within this town centre, which are mainly

concentrated on East High Street. There are however relatively few shops catering for menswear or furniture, and few “variety” stores, such as WH Smiths and Argos. These types of shops are often more numerous in Montrose, which has a smaller resident population (see Table 1) but which obviously serves a different catchment; one that is likely to include parts of Kincardine & Mearns in Aberdeenshire.

- 6.9 Within Montrose town centre, although there are only a few shops devoted to the sale of electrical goods, many other comparison shop categories are well represented. This means that there is quite a diverse range of retailers within Montrose, which is further complemented by a reasonable variety of ancillary services such as cafes, takeaways and restaurants (see Appendix 3).
- 6.10 In addition to the commercial uses discussed above, residential properties are a feature of all the Angus town centres. The presence of flats and houses helps to increase vitality and provides a local customer-base for shops and services. Figure 4 provides an overview of the number of flats and houses within the defined town centres. In comparison with Figure 3, this graph gives an idea of the relative split between residential and non-residential uses within each centre.

Figure 4: Graph to show the number of residential properties within each of the Angus town centres



Source: Uniform database (at June 2010), Angus Council

- 6.11 The above graph shows that there is a close relationship between the number of commercial units within a centre and the number of residential properties. In simple terms, we find that more of one implies more of the other. This is likely to reflect the difference in the relative size of the seven town centres; however it is interesting to note that there are some discrepancies underlying this simple relationship. Montrose town centre has a larger ratio of residential properties to retail and service uses than either Forfar or Arbroath. Similarly, Monifieth has a high proportion of residential use, reflecting the presence of large residential institutions on the High Street. The relatively large number of potential

customers in the local area helps to explain the relatively high proportion of comparison or convenience shops within Monifieth and Montrose town centres (Figure 3).

- 6.12 Angus Council's Retail Floorspace Survey (RFS) also provides information on the range of town centre uses across Angus, in terms of the amount of floorspace given over to each retail and service category. The RFS floorspace figures are however only broadly comparable with the above health check findings on the number of retail and service units, because of the difference in base date between the two surveys, together with differences in survey methodology. As such, Appendix 4 presents only the aggregate findings for the quantity of convenience and comparison floorspace within the seven towns.
- 6.13 The findings of the 2009 RFS reinforce the findings shown in Figure 3, as the relative proportions of convenience and comparison retailing between the seven towns and their town centres are consistent; except in the following cases:
- In 2009, the quantity of convenience floorspace within Montrose was greater than either Brechin or Carnoustie; this is likely to reflect the relative size and number of food & drink convenience shops (e.g. supermarkets & corner shops) between these towns.
 - Arbroath had the greatest quantity of convenience retail floorspace – a fact that is not reflected in the number of units present within the town centre, but is likely to reflect the relative quantities of floorspace at this geography, given the presence of two supermarkets (Co-op & Lidl).
 - Lastly, it is also noticeable that both Arbroath and Montrose had a greater quantity of comparison retail floorspace than Forfar, a fact which is not reflected in the number of these units within the town centre.

Summary of the range of uses within the town centres

A diverse and well-represented range of retail and service uses encourages people to visit, shop and ultimately to spend money in a town centre. This means that the variety and number of these uses affects the vitality and viability of the Angus town centres. The main points regarding town centre uses are as follows:

- Within **Forfar & Carnoustie**, retailers are out-numbered by service uses such as hairdressers, restaurants and takeaways. There is a more even distribution of retail and service uses in **Arbroath**; and in particular within **Montrose**, which has a remarkably diverse range of shops relative to the other town centres.
- There are concentrations of particular types of shops and services within some of the town centres. For example, there is a large number of hairdressers within **Forfar**; whilst within **Monifieth & Carnoustie** town centres, a high proportion of the retail uses sell food & drink.
- Within **Brechin** and **Kirriemuir** town centres, there are often only one or two businesses within a particular retail or service category. This means that the availability of goods and services could be severely affected by the closure of just a few businesses.
- In general, a large number of commercial uses translates coincides with a large number of residential uses. In light of this correspondence, both **Montrose** and **Monifieth** town centre have more residential properties than one would expect.
- The findings of the 2009 Retail Floorspace Survey, in terms of the amount of floorspace in use across a whole town, broadly reinforce the findings of the 2010 Town Centre Health Check.

Vacancy Rates

Background information on the methodology

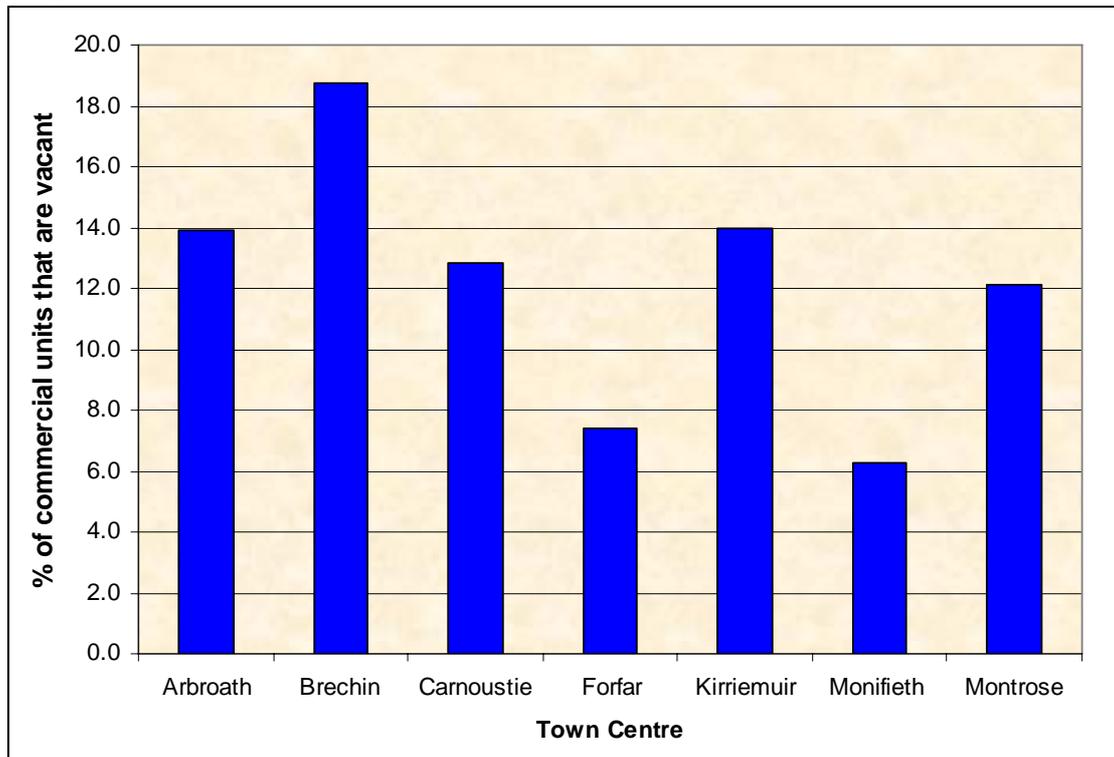
- 6.15 On the basis of a walk-round survey of town centre uses, officers recorded the location of any and all vacant premises and categorised these properties using one of the two 'vacant' types used in the RFS: vacant (retail) and vacant (non-retail commercial).
- 6.16 The number of vacant properties within each town centre was determined on the basis of the survey results. These figures therefore reflect the number of vacant units observed in August 2010. In addition, the survey results were interrogated to provide information on the percentage of vacant retail units in the central or 'core' areas of the Angus town centres. This allows us to monitor Policy SC24: Core Retail Areas from the Angus Local Plan Review (adopted 2009), using the 2010 Town Centre Health Check results.

Comparison of the seven town centres

- 6.17 At any one time, the number of vacant units present within each town centre reflects the number of units that have previously been in retail or commercial use. If there is no reason why one town should be performing worse than any other, one might expect the smallest town centre to have the fewest vacant units, and the largest town centre to have the most. This expectation was borne out by the facts: Arbroath town centre had a total of 33 vacant commercial units, whilst Monifieth had only three (August 2010). However, there are some interesting deviations from this trend, which suggest a difference in relative performance between the seven town centres.
- 6.18 The proportion of vacant units, expressed as a percentage of all retail and other commercial uses, reveals that Brechin has the highest rate of vacant commercial properties of all of the seven town centres. At the other end of the scale, both Monifieth & Forfar have a low proportion of vacant commercial units in comparison with the remaining town centres. This can be seen from Figure 5 (see next page).
- 6.19 There are a variety of reasons why traditional town centres might have a large number of vacant retail and commercial premises. A lack of flexibility in the available shop units – especially in historic burghs, where the retail units may be accommodated in listed buildings or within a conservation area – may limit the appeal of certain premises to potential investors (particularly national multiples). Over time, a small concentration of vacant premises can reduce the vitality of an area within the town centre, leading to further vacancies as a result of a reduction in passing trade. This can lead to parts of the town centre changing their character and losing their function as a place for commercial activity. With regard to the Angus towns, the core area southeast of the Mercat Cross in Brechin fits this description, in that it contains a relatively large number of vacant units and is a quiet but historic area of the town centre (see section 5: pedestrian counts).
- 6.20 For the remaining town centres, Arbroath and Kirriemuir have higher vacancy rates than the four town centres of Carnoustie, Montrose, Forfar & Monifieth. Within Arbroath, the Abbeygate Centre has a relatively high concentration of vacant units, although there were also a number of vacancies at various points along the High Street. Whilst some operators such as Woolworths were undoubtedly a victim of the "credit crunch", units in Arbroath have also been

filled since the effects of the economic downturn first became apparent (e.g. Nickel 'N' Dime and The Corner House Delicatessen have recently filled vacant premises). A large number of Arbroath's vacant commercial units are however former retail uses, indicating that business viability may be a problem for retailing rather than ancillary, business or leisure services (see Figure 1, Appendix 5).

Figure 5: Graph to show the percentage of all commercial properties (retail, business, leisure) observed as being vacant within the Angus town centres (August 2010)



6.21 Kirriemuir follows the same pattern as Arbroath, in that a large proportion of the vacant units are also former retail uses (Figure 1, Appendix 5). Although the actual number of vacancies is small (four vacant shop units), they are significant for the retail offer, in that a high proportion of the convenience and comparison shops in Kirriemuir are specialist independent retailers. These shops may provide luxury items, rather than items which satisfy everyday consumer needs (a full list of specialist independent retailers is provided in Appendix 5, which illustrates the point). Consequently, if only a few of the remaining available units are vacant, this may have a disproportionate effect on the diversity of retailing. The high vacancy rate is therefore of some concern for the provision of comparison goods in particular; although it is arguable that Forfar caters for much of this need given its close proximity.

6.22 The low number of vacant retail units and the low percentage of vacant units within Forfar indicates good levels of vitality and viability relative to the other centres. This is supported by the findings from the pedestrian counts (see section 5: pedestrian counts). For Monifieth, although only a few of the available commercial units are vacant, the small number of retail units overall means that the vacancy rate is very sensitive to minor changes in the number of vacancies. As such, it is difficult to draw conclusions on the health of the town centre merely from the low vacancy rate that was apparent in August 2010.

- 6.23 The percentage of vacant units in Carnoustie & Montrose is neither particularly high nor particularly low relative to other town centres, which suggests that business viability is less of a problem in these towns than in Brechin, Arbroath & Kirriemuir; but potentially more of a problem than in Forfar & Monifieth. Although Montrose had the second highest number of vacant retail units, it had the third highest number of convenience and comparison shops overall. This changes the significance of the number of vacancies, especially given the diversity of comparison shops relative to other Angus towns (see paragraph 6.8). In this context, vacancies in Montrose may be thought to present opportunities for expansion, rather than being problems with the retail offer.

Core Areas

- 6.24 Not all of the Angus town centres have core areas, as defined by the Angus Local Plan Review (adopted 2009). The small linear town centres of Monifieth and Carnoustie do not have a single focus for commercial activity, especially in comparison with the remaining Angus towns. For the other town centres, the impact of vacancies within the central shopping area does however warrant some attention, as it is often important for the visitor's perception of a town centre that these areas encourage people to visit and spend time there.
- 6.25 The differences in size between the Angus town centres means that a comparison of the percentage of vacant retail units within the core areas is a useful way of comparing one centre with another (see Figure 2, Appendix 5). In these terms, it is noteworthy that the vacancy rate is particularly sensitive to changes in the number of vacant units for the small core areas of Brechin, Forfar and Kirriemuir. Notwithstanding this, Kirriemuir town centre has the highest level of core area vacancies within Angus, followed by Arbroath and Brechin. Over time, this may put pressure on the retail offer within these central areas, for the owners of these units may eventually be forced to seek alternative (even non-commercial) uses for their properties.
- 6.26 By contrast, vacancy rates in the core areas of Forfar and Montrose are relatively low. Almost all of the commercial units within these areas were occupied during the survey (August 2010), a fact which is likely to contribute to good levels of footfall and hence vitality at this location; this coincides with the findings of the pedestrian counts at these locations (see Figure 2). For purposes of monitoring Policy SC24: Core Retail Areas, it is noteworthy that only one of the core areas (Forfar) had a vacancy rate of less than 5% of the total retail units.

Summary of the vacancy rates within the town centres

A large number of vacant units within a town centre is likely to detract from its vitality and, by reducing the possibilities for shopping and leisure, affect the viability of the remaining uses. The main points regarding vacancies within the town centres are as follows:

- **Arbroath** town centre has the greatest number of vacant commercial properties, whilst **Monifieth** has the smallest number.
- However, it is **Brechin** town centre that has the highest rate of vacant properties, as a proportion of all commercial uses.
- **Monifieth & Forfar** have a low vacancy rate in comparison with the other Angus town centres.
- **Arbroath & Kirriemuir** have higher vacancy rates than all other Angus town centres except **Brechin**. In the case of both **Arbroath & Kirriemuir** town centre, a large proportion of the vacant units are former retail uses, indicating perhaps that service uses (e.g. restaurants, pubs, takeaways, banks) are often more economically viable than retail uses.
- Although **Montrose** town centre had the second highest number of vacant retail units, the vacancy rate is similar to **Carnoustie's**, being neither high nor low relative to the other Angus town centres. These vacancies may be thought of as retail opportunities, given the relatively strong performance of the centre in providing a diverse range of shops and services.
- **Kirriemuir** town centre has the highest level of core area vacancies within Angus, followed by **Arbroath & Brechin**. Vacancy rates in the core areas of **Forfar** and **Montrose** are relatively low (NB: **Monifieth & Carnoustie** do not have defined core areas and so do not feature within this comparison).
- For purposes of monitoring Policy SC24: Core Retail Areas, it is noteworthy that only the core area of **Forfar** had a vacancy rate of less than 5% in August 2010.

7. Crime Levels

Background information on the methodology

- 7.1 Statistics on particular types of criminal offence were requested from Tayside Police, for the seven town centre areas. The offences considered include crimes of violence and indecency – a high incidence of which may have a detrimental effect on the perception of a town centre as a safe place to be – and crimes such as vandalism, shoplifting and vehicle crime, which directly affect the visitor experience or the viability of individual shops. The offences deemed relevant for purposes of this health check are referred to below as town centre crimes.
- 7.2 Crime analysts from Tayside Police provided information on the incidence of town centre crime over the past two calendar years (Jan 2008-Dec 2009 inclusive). This provides an indication of variations in the number of recorded crimes over time within a town centre, as well as the relative incidence of these crimes between town centres. Figure 1, Appendix 6 has been interpreted to provide an indication of how recorded crime may have affected the relative vitality and/or viability of the Angus town centres.

Comparison of the seven town centres

- 7.3 Figure 1, Appendix 6 shows that levels of recorded crime for each of the seven Angus town centres. As may be expected, the centres with the greatest number of shops (Arbroath, Forfar and Montrose), recorded the greatest number of town centre crimes. Indeed, levels of shoplifting were noticeably lower in Brechin, Carnoustie, Kirriemuir and Monifieth. Particularly low levels of shoplifting were recorded in Brechin and Monifieth town centres over the period. The small figures for Monifieth are not unexpected, given the small number of shops in comparison with the remaining Angus town centres.
- 7.4 Other offences that feature prominently in the records for Arbroath, Forfar and Montrose town centre include vandalism and petty assault. Levels of vandalism within Brechin and Kirriemuir are comparable to those recorded for these larger town centres. These crimes are likely to have a detrimental effect on the perception of a locality as a pleasant and safe place to be, and so may affect vitality by dissuading people from visiting either the town centre as a whole, or just particular areas. In total however, there were generally less than 40 cases per year of these crimes within each of the Angus town centres. It is also important to note that some of the crimes (particularly those harming individuals rather than property) will have a greater impact on the evening economy, if they have generally occurred, or are thought to have occurred outwith normal shop and office opening times.
- 7.5 Generally speaking, the differences between the larger centres are slight, given the number of recorded crimes involved; although there does appear to be a slightly higher incidence of several town centre crimes (shoplifting, breach of the peace, petty assault and supply & possession with intent to supply Class A drugs) in Montrose relative to Forfar. This is perhaps surprising, given the greater number of shops and services in Forfar town centre (Figure 3) and the larger resident population of the town itself (Table 1). Arbroath had the highest recorded shoplifting of the seven town centres, with approximately double the number of incidents recorded in Forfar town centre. This crime can affect the viability of local retailers, especially in times of economic difficulty.

- 7.6 Levels of recorded crime in Brechin, Carnoustie, Kirriemuir and Monifieth town centres are generally low, relative to the abovementioned larger Angus towns. Vandalism and petty assault accounted for many of the recorded offences in Brechin and Kirriemuir town centres, whilst levels of all of the town centre crimes were low in Carnoustie and Monifieth. Monifieth had the lowest levels of recorded town centre crime of all seven Angus town centres.

Summary of the crime levels within the town centres

High levels of reported crime may affect the vitality of a town centre, by creating the impression of an unsafe environment. In the case of shoplifting offences, crime levels may be indicative of problems for the viability of local retailers. The main points regarding the incidence of crime within the town centres are as follows:

- The town centres of **Arbroath, Forfar** and **Montrose** had a greater number of recorded town centre-type crimes (2008-2009) than the smaller centres of **Brechin, Carnoustie, Kirriemuir** and **Monifieth**.
- In 2008 & 2009, levels of shoplifting were noticeably lower in **Brechin, Carnoustie, Kirriemuir & Monifieth** town centres than in the larger centres of **Arbroath, Forfar & Montrose**. Over the same period, levels of vandalism within **Brechin & Kirriemuir** town centres were comparable to those for the larger centres of **Arbroath, Forfar & Montrose**.
- Between the larger town centres of **Arbroath, Forfar** and **Montrose**, the differences in the overall levels of town centre-type crime, and with regard to many specific categories, were small in scale. It is however noteworthy that **Arbroath** town centre had approximately double the number of recorded shoplifting incidents to **Forfar** town centre over the period 2008-2009.
- In 2008 & 2009, **Monifieth** had the lowest levels of recorded town centre crime of all seven Angus town centres. Levels of all of the town centre-type crimes analysed were also low within **Carnoustie**.

8. Accessibility

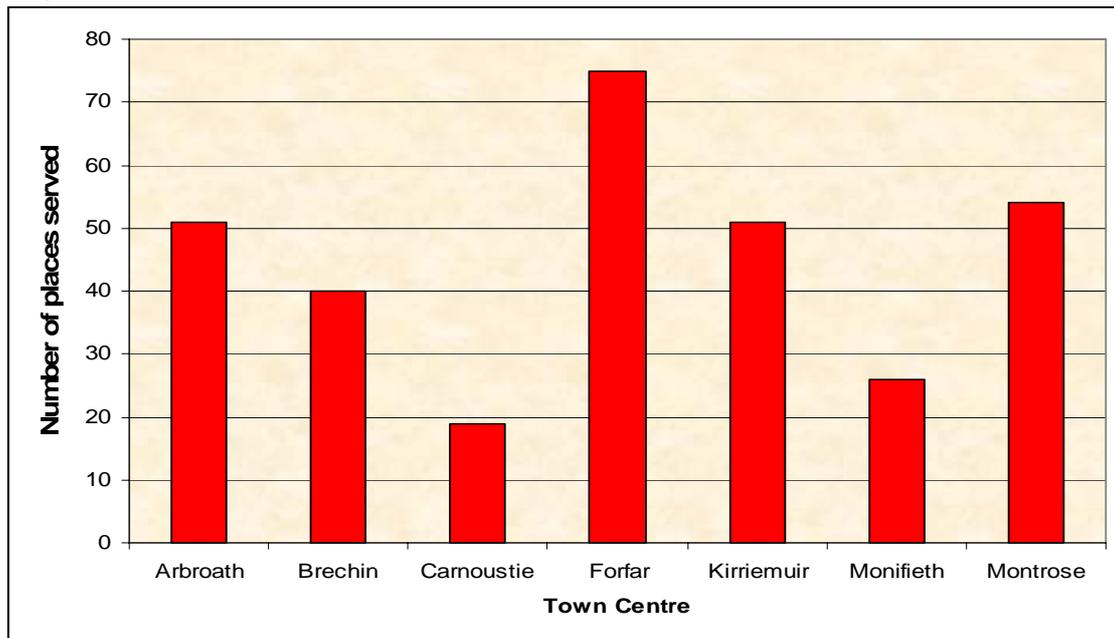
Background information on the methodology

- 8.1 Information on the number of bus and train services, together with the quantity of off-street parking in Angus Council-operated car parks, was collected to give an impression of the potential accessibility of the seven town centres. The data sources used included publications from Angus Council and public transport operators. Bus and train service information was analysed to ascertain the frequency of connections and (for buses) the number of places (towns, villages or small rural communities) served.
- 8.2 Due to its proximity to the town centre, bus services to/from Arbroath bus station were considered for purposes of determining the number of places served; in all other cases, bus stops within the town centre were used as the final destination/starting point.

Comparison of the seven town centres

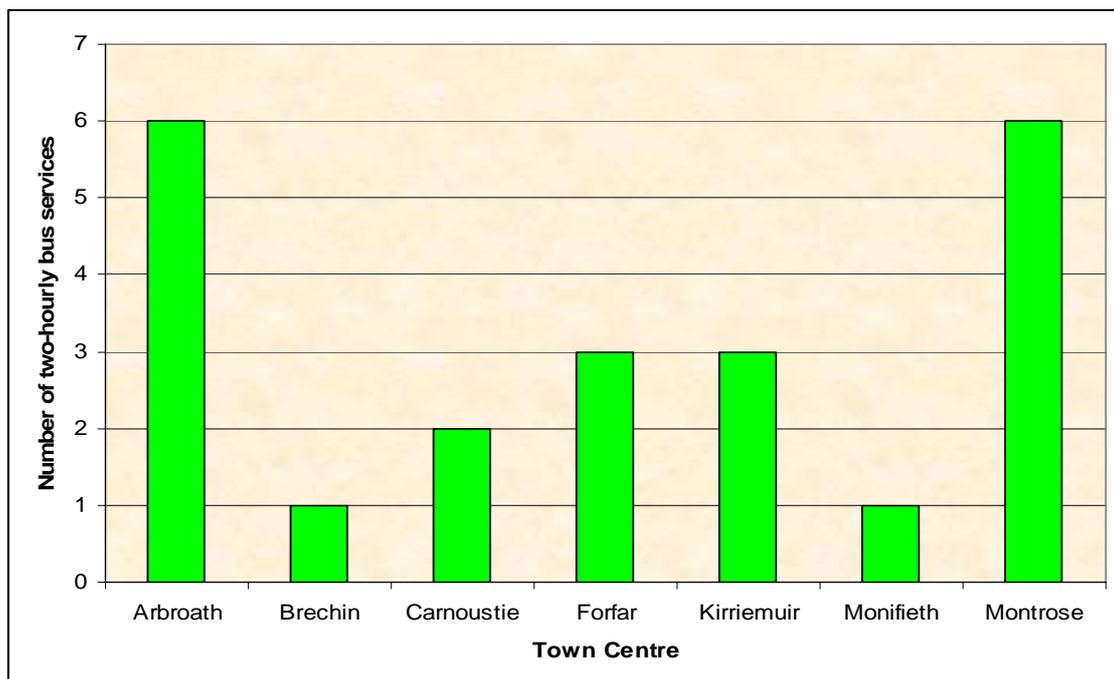
- 8.3 As may be expected, the three largest towns of Arbroath, Forfar and Montrose have a large number of bus services serving other places from the town centre (see Figure 1, Appendix 7). More importantly in terms of who can access the town centres, they are connected to a large number of places by these bus services (see Figure 6, next page). In the case of both Montrose and Arbroath, access is also possible by train from areas outwith Angus (and from Carnoustie); this is likely to be important for increasing tourist traffic. The frequency of trains serving these three towns is variable, with Arbroath having the greatest number of services per day (see Figure 2, Appendix 7). Monifieth also has a train station, although it is of limited value in connecting the town centre to other areas as there are only two services that stop here on a daily basis (Monday-Saturday). In terms of access to the town centre, it is noteworthy that the Arbroath train station is not conveniently located.
- 8.4 For the other town centres, there are large variations in both the number of places served and the number of bus services. Kirriemuir is well connected to other areas, which is likely to reflect its location close to a large number of rural communities. By contrast, buses from Carnoustie town centre serve relatively few places; although there are two services that run at least once every two hours (Figure 7) and the town is connected to other areas by train. The proximity of Dundee (a transport hub) significantly increases the connectivity of Monifieth, although there are relatively few services which bring visitors to the town centre. Lastly, Brechin town centre is quite well connected to a large number of places, albeit by a relatively small number of bus services.
- 8.5 The frequency of a bus service is an important consideration for potential customers and gives a further indication of how accessible a town centre is to the users of public transport. In conjunction with Figure 6, Figure 7 provides an indication of how well connected a town centre is to other areas. On the basis of this data, it appears that Arbroath and Montrose are the most well connected town centres by bus, although a greater number of places are served from Forfar (see Figure 6). Kirriemuir appears to be the most well connected of the smaller town centres (i.e. compared to Brechin, Carnoustie & Monifieth); although as mentioned above, both Carnoustie and Monifieth are also accessible by train.

Figure 6: Graph to show the number of places served by buses, from each of the Angus town centres



Source: Angus Council bus timetable index (August 2010)

Figure 7: Graph to show the number of two-hourly bus services (i.e. services with a frequency of one bus every two hours), from each of the Angus town centres



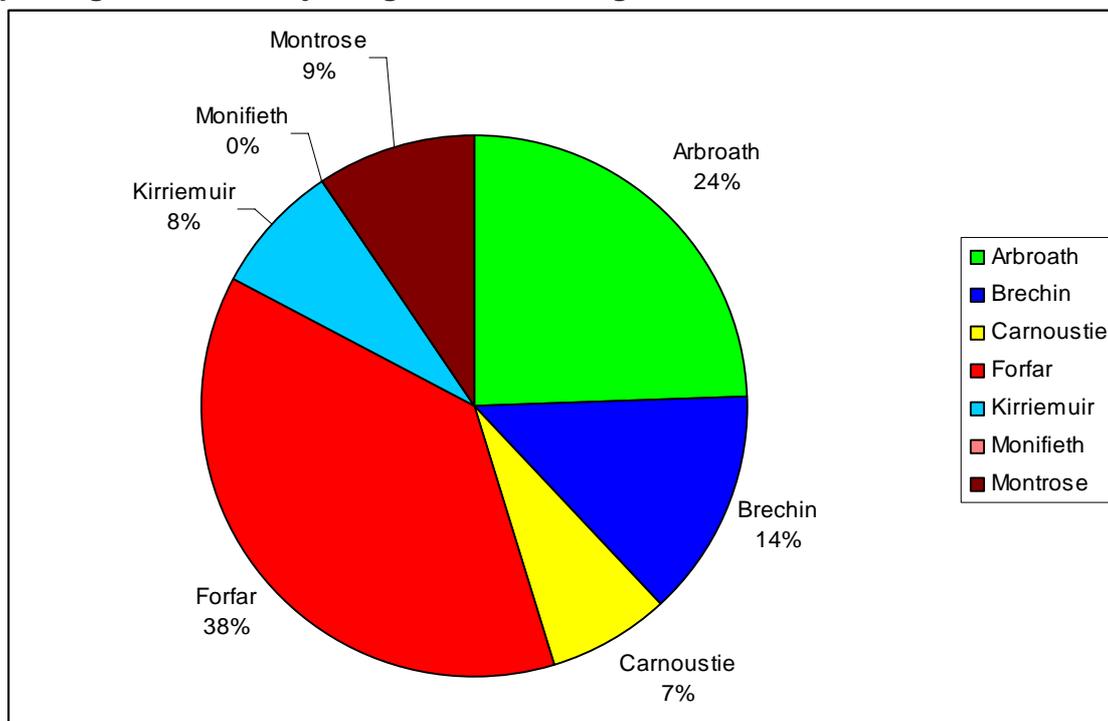
Source: Angus Council Public Transport Map & Guide (2010 Edition), cross-referenced with published bus timetables (October 2010)

8.6 In addition to the aggregate statistics, it is important to remember the role of the Angus towns as centres which serve a diverse rural area. The number of rural bus connections may affect both the vitality and viability of a town centre, by helping to increase, or alternatively to limit a town centre's potential customer base within the rural area. As such, the number of villages served by each of the seven town centres was also considered as part of the health check. The

data suggests that Forfar and Kirriemuir town centres have the largest number of bus connections with rural communities, with 32 and 28 villages served respectively (August 2010); whilst Carnoustie and Monifieth have the fewest number of connections, with 6 and 11 villages served. Figure 3, Appendix 7 provides an overview of connectivity with the rural area for each of the seven town centres.

8.7 For the sake of convenience or due to the lack of a realistic alternative, many people are likely to access the Angus town centres by car. Because of this, the quantity of off-street parking is important for allowing ease of access. Figure 8 shows a comparison between the seven towns, in terms of the proportion of the total amount of Council-operated off-street parking within and adjoining all of the town centres. If off-street parking was distributed equally between the seven town centres, one seventh (approximately 14%) of the total would be located in each centre. In fact, only Brechin town centre was found to have this share of the total quantity, with other centres having less, except Forfar and Arbroath (the two largest shopping centres in terms of the number of shops and services).

Figure 8: Pie Chart to show the proportion of Council-operated, off-street car parking within and adjoining each of the Angus town centres



Source: Angus Council Roads Department (July 2010)

8.8 It is noteworthy that Monifieth town centre has no Council-operated car parks within or adjoining its boundary. This does not however mean that off-street parking is unavailable; there are several privately operated car parks associated with retail and service uses, which provide this facility for shoppers. In fact, car parking for several other town centres (Arbroath, Carnoustie, Kirriemuir, Montrose) is supplemented by privately operated facilities, usually associated with supermarkets close to or within the town centre. These car parks often have time restrictions and penalties for misuse associated with them.

- 8.9 In general, the larger town centres have the largest quantity of Council-operated off-street parking; although there is clearly a greater number of spaces in/adjoining Brechin than there are in/adjoining Montrose town centre. Privately-operated car parks (i.e. those associated with Tesco and Argos/Gillies) help to supplement the provision in Montrose, whilst the quantity of car parking in the vicinity of Kirriemuir town centre is increased by the Council-operated car park at Bellies Brae; although the steep incline between this and the shops and facilities limits the value of this car park for the less mobile.

Summary of accessibility for the town centres

The provision of public transport between a town centre and other areas, and the provision of car parking within a town centre are important issues for reasons of vitality and viability. A large number of transport connections increases the potential customer base, whilst frequent connections would increase the likelihood of public transport users visiting a centre. Similarly, the perceived availability of parking may affect the number of people visiting a centre, by dissuading or encouraging “spur of the moment” visits. The main points regarding town centre accessibility are as follows:

- **Arbroath, Forfar and Montrose** have a larger number of bus services than the remaining Angus town centres. Services from these larger centres also connect with a larger number of places than is the case for **Brechin, Carnoustie and Monifieth**.
- Overall, **Arbroath & Montrose** appear to be the most well connected town centres by bus, although a greater number of places are served from **Forfar** town centre. **Kirriemuir** appears to be the most well connected of the smaller town centres (i.e. compared to **Brechin, Carnoustie & Monifieth**).
- Access by train is possible in **Arbroath, Carnoustie, Monifieth and Montrose**. **Arbroath** has the largest number of train services per day (Monday-Saturday), with **Carnoustie & Montrose** also being well served. There is only an infrequent train service connecting **Monifieth** with other areas.
- **Forfar & Kirriemuir** town centres have the largest number of bus connections with rural communities. **Carnoustie & Monifieth** town centres have the fewest number of rural connections.
- Of the seven town centres, **Forfar** has the largest share of Angus Council-operated off-street car parking. **Arbroath** town centre also has a large quantity of off-street car parking, which is further supplemented by parking facilities associated with the supermarkets.
- Privately-operated car parks also supplement the provision of off-street parking in/adjoining **Carnoustie, Kirriemuir & Montrose** town centres. In **Monifieth** town centre, all off-street parking is privately-operated.

9. Conclusions

- 9.1 As would be expected, the seven town centres are diverse in character and each one has its own particular strengths and weaknesses, in relation to the others. Furthermore, the opportunities for improving future vitality and viability are different in each case; and there are different issues which can be identified for the seven town centres. An analysis of the relative strengths, weakness, opportunities and threats (a SWOT analysis) is presented for each town centre over the next few pages. In addition however, a number of broad conclusions can be drawn that relate to more than one town centre.
- 9.2 The town centres of Strathmore (Forfar, Kirriemuir & Brechin) tend to have more specialist independent retailers than the coastal town centres, which in the case of Arbroath and Montrose are a focus for the national multiples, such as Argos and WH Smith. There may be a variety of reasons for this, from the size of the local population, to the configuration of available units. This may also express the current function of a town centre, with Kirriemuir being perceived as a tourist destination due to its “gateway to the glens” location and its fame as the birthplace of J.M. Barrie.
- 9.3 The larger town centres of Arbroath, Forfar and Montrose tend to be the most well-connected; appear to be the busiest; and have the largest residential populations. These results are reasons to think that the larger town centres will be more resilient to the economic downturn and to changes in the nature of retailing brought about by the rise of internet shopping. However, the vacancy rates for each of these towns (proportion of vacant units relative to all commercial uses) show marked differences, with Forfar having relatively few vacant units, whilst Arbroath has many. It is therefore interesting to note that within Angus, commercial viability appears to be strongly influenced by factors that are specific to a town centre (e.g. the condition of the available properties and the general nature of the built environment). For more information, the SWOT analyses identify factors that affect the viability of commercial uses. Socio-economic factors (such as the relative affluence of potential customers and local rental values) would also be important in considering viability.
- 9.4 For the smaller centres of Brechin, Carnoustie, Kirriemuir and Monifieth, the results show that it is important to recognise the fragile nature of the town centre, as a place where a diverse range of activities occur. For Brechin & Kirriemuir town centres, it is particularly noticeable that diversity in the range of goods and services is heavily dependent on the continuing existence of individual businesses. Within Carnoustie and Monifieth, many of the health check’s retail categories are not represented, perhaps as a result of the proximity of Dundee.
- 9.5 When looking into such a multi-faceted issue as the health of a town centre, it is not very useful to create a ranking to show which town is performing the best or the worst overall. The results of the 2010 Angus town centre health checks show that a town centre (Kirriemuir) may be attractive and have a high quality environment; have a distinctive retail offer; be relatively accessible; yet still have one of the highest vacancy rates of the town centres under consideration. Particular difficulties are not highlighted within an overall ranking, yet it is these that are often of greatest concern regarding an individual town. The following SWOT analyses, together with the previous boxed summaries, provide the necessary detail to enable a full appreciation of the results to the 2010 town centre health checks.

Arbroath Town Centre SWOT analysis

Strengths

- Relatively high levels of pedestrian footfall within town centre; good prospects for passing trade.
- Relatively large number of national multiples (40 units from a total of 237); over half of these are retail units.
- Town centre is amongst the most accessible in Angus by public and private transport modes (bus, rail and road connections).
- Arbroath has a relatively large share of the off-street car parking in/around the Angus town centres, with a large quantity in its town centre. In addition, there are car parks associated with the Co-op and Lidl, although these are for customers only.
- Pedestrianised area provides large quantity of public space in the heart of the town centre, whilst limiting the effects of traffic (noise, pollution, poor ease of pedestrian movement) on the retail environment.
- The town centre acts as a linkage between the harbour and the Abbey; it is close to significant visitor attractions.
- A large range of community facilities (theatre, library, health centre) are within or close to the town centre.

Weaknesses

- Large number of vacant retail units within the town centre (relative to other town centres within Angus, Arbroath has the greatest number of vacant units).
- Largest number of discount & charity shops, relative to other centres. Arbroath has the greatest % of discount and charity shops, from all convenience and comparison types.
- The town centre has third lowest proportion of specialist independent retailers. Together with the above bullet point, this limits the appeal of the centre. For high value, high quality items, the choice may be extremely limited or non-existent.
- Quality of built environment as a result of poor building maintenance, low quality design and poor signage/shop fascias.
- Relatively high levels of shoplifting within town centre (Jan 2008-Dec 2009), along with vandalism and petty assault.
- Traditional buildings are less flexible for modern retailers and may not suit the requirements of national multiples.
- Few restaurants or takeaway uses in the centre, to provide an evening economy.

Opportunities

- Pedestrianised environment (i.e. pedestrian capacity of high street) and good levels of accessibility provide large potential for visitor trade.
- The number of national multiples provides a basis for reinforcing the role of Arbroath as a locally important retail centre (the place to visit for shops of this nature).
- Areas of the town centre have a distinctive character (use of local stone, vistas of Abbey, important local buildings). More could be made of these assets in renewing low quality development.
- A number of retail categories are not well represented, although there is no single type of use that predominates (variable representation across and within broad categories). This indicates that centre plays a variety of roles (convenience, comparison, leisure etc.).

Threats

- Continued degradation of the town centre environment by increases in shop vacancies; further use of unsympathetic signage; lack of investment in the built fabric of the centre.
- Vacant retail units help to create an environment that is unattractive to inward investment, due to a lack of commercial activity.
- "Place function" of town centre environment is lower than it could be; there is nowhere to linger within the centre, even though the high street is pedestrianised. This could restrict the function of the centre to one of servicing everyday retail needs, which would make it susceptible to changes in shopping habits (increased mobility of modern consumers, rise of internet shopping).

Brechin Town Centre SWOT analysis

Strengths

- Largest number of national multiples of the smaller town centres (i.e. excluding Arbroath, Forfar & Montrose). This may provide residents with a reason for shopping locally.
- Very high number of specialist independent retailers compared with other towns. Brechin has the second highest proportion of these shops (i.e. relative to all convenience & comparison uses) of all centres.
- Relatively large quantity of off-street parking on the periphery of the town centre.
- Levels of shoplifting are the lowest relative to all other Angus town centres. Reported crime is low for many types of the town centre crimes considered.
- There is evidence of recent investment by national multiples and a turnover of vacant retail premises within the core area. There is therefore some confidence in the town as a viable retail centre.
- The built heritage is of a high quality, with a strong building line and narrow closes providing a distinct character to the core area.

Weaknesses

- Vacancy rates are the highest of all seven Angus town centres (all commercial units). The number of vacant retail units is greater than for Forfar and the highest of the smaller town centres.
- Levels of pedestrian traffic are highly variable throughout centre. Measurements of pedestrian flow express differences between High Street (in the core area) and St David Street/Swan Street. The historic centre is quiet, with less potential for passing trade.
- Bus connections to/from other places are less frequent than for other Angus town centres.
- Petty assault & vandalism levels are quite high relative to other small towns (although comparable to Kirriemuir).
- Lack of rear servicing means that delivery vehicles must park on the street, hindering pedestrian/vehicle movement and impacting on pedestrian safety.
- Patchy provision of visitor infrastructure (few pedestrian signs, no benches). Public space does not encourage visitors to linger.
- Off-street parking has limitations, in that connections to the town centre are not always suitable for the less mobile. There is no facility for coaches.

Opportunities

- Brechin is connected to a reasonable number of places (towns, villages, destinations) by public transport, although less so than other town centres.
- The renovation of historic buildings, as part of the Townscape Heritage Initiative, will help to improve the town centre environment and could help to bring premises into active retail use and/or increase footfall in quieter areas.
- The high quality of the built heritage provides an attraction that could be used to enhance shopping experiences. Town centre uses could make a more sympathetic use of this asset (e.g. through improvements in fascias, signage).
- Visitors are not encouraged to dwell in the core area or elsewhere, restricting the function of the centre to one of servicing everyday retail needs. Given the historic attractions of the town (round tower, cathedral, museum, distinctive street pattern (closes)); this seems like a missed opportunity.
- Review of traffic management arrangements (by March 2011) could allow for improvements in the ease of pedestrian movement.

Threats

- Although floorspace usage is quite diverse within the town centre (many types of convenience and comparison shops are represented) there is typically only one or two stores of a certain type. This means that the town centre is heavily reliant on individual retailers, to maintain its offer.
- Frequency of connections by public transport is not as good as for other Angus towns, which could limit efforts to increase visitor numbers.
- Many of the town centre retail units occupy historic buildings and have limited access for servicing purposes. This may limit their appeal to inward investment, especially for certain types of retailers (national multiples).
- High numbers of vacant units increase the likelihood of planning applications for change of use, from a commercial to a residential purpose. Such a change of use may facilitate a decline in the vitality of the centre, thus reducing the draw of the town centre for visitors.

Carnoustie Town Centre SWOT analysis

Strengths

- There are very few national multiples, meaning that local retailers have created a distinctive retail environment.
- There are relatively few vacant units within the town centre. This creates a sense of vitality.
- The town centre has low levels of recorded town centre crimes relative to other Angus town centres.
- Bus stops and off-street parking are very well located for accessing shops and services. The council-operated car parks in the vicinity are supplemented by parking associated with the Co-op.
- Topography of the high street provides an easily accessible retail environment for all. Traffic levels do not prevent movement across the street.
- Eastern areas of the high street are well maintained and attractive. This provides a welcoming environment for visitors.

Weaknesses

- Levels of pedestrian traffic were low during the survey. This suggests that the town centre is not a busy retail environment during summer weekdays.
- The town centre is not well connected to smaller settlements by bus, but has frequent (bus & train) connections to larger centres such as Arbroath & Dundee. This indicates that the centre has the role of providing services for residents/tourists, but not visitors from the local area (people are unlikely to come from larger towns to shop).
- The range of shops is quite limited (though eclectic) and focuses on services ancillary to retail use, such as takeaway food and hairdressing.
- Lack of quality visitor infrastructure (e.g. public conveniences, benches in central area) and poor linkages between the high street and beach front.
- Retail environment is limited to a single street, creating potential difficulties for servicing businesses.

Opportunities

- There is only one golf shop within the town centre, although there are some hotels and restaurants which could provide ancillary services for golf visitors. There may be scope to strengthen the relationship between the town centre and the beach front/golf course (both in terms of access and the range of shops & services for visitors).
- Modern insertions to the high street (west end) are low quality in terms of design and appearance (fascias, signage). These buildings provide an opportunity to improve the retail environment.
- Golf-related events bring people to the town and raise its profile. This can be used to increase visitor trade.
- Vacant properties opposite the SPAR are prominent features of the town centre environment and provide retail opportunities in a highly visible location.

Threats

- There is a physical separation between visitor attractions (beach front & golf course) and the town centre. Barriers to movement (the railway line) may reduce the effectiveness of any effort to improve linkages.
- Although the town itself is a destination for golf tourists, the linear form of the town centre is such that there is no focal point, to act as a destination or a central meeting place for visitors. There is no locus of activity to encourage pedestrians to dwell, or to draw day visitors into the town centre. This threatens the continued viability of the town centre.
- As with other small town centres, Carnoustie is reliant on particular retailers to maintain a diverse retail offer.

Forfar Town Centre SWOT analysis

Strengths

- Low vacancy rate and a low number of vacant retail units creates a sense of vitality and indicates relatively strong financial viability. This is reinforced by noticeable recent investment by retailers.
- Relatively high levels of pedestrian footfall throughout centre; good prospects for passing trade.
- Relatively large number of specialist independent retailers, which provide reasons for visiting town centre.
- Very well connected to other places (towns, villages, destinations) by bus. Serves a large rural area. Main bus stops are well located for shops.
- Relatively large selection of restaurants, cafes and takeaway outlets, to cater for lunchtime/evening trade.
- Large quantity of off-street parking in car parks that are well-located for access to the town centre.
- Historic built environment and important civic buildings provide an easily legible environment within the core area.
- Lower levels of shoplifting than the other two large towns (Montrose & Arbroath).

Weaknesses

- Relatively small number of national multiples, compared to the other large Angus towns; and only a small proportion of retail units are specialist retailers. This may limit the appeal of the retail offer.
- Town centre floorspace use is concentrated in particular types of retail service use (notably hairdressers) relative to other large centres.
- The historic street pattern gives rise a pedestrian realm of varying width, which can hinder ease of movement during busy periods.
- The majority of shops and services (and points of arrival by bus) are located on East High Street, which extends a long distance from the central core area. Other peripheral areas (Castle Street, West High Street) are distant, if one considers only those routes which would be apparent to the visitor.
- Public open space is dislocated from the largest concentration of shops (East High Street). Little Causeway is not obvious to visitors.

Opportunities

- High quality built environment and ease of access from many different places create a large potential for visitor trade.
- Improvements to the pedestrian realm (width of pavements and priority to pedestrians rather than cars) could help to improve shopping experiences in core area.
- A number of retail categories are not well represented. There may be scope for greater comparison goods retailing (many of the units are in use for the leisure, business and ancillary-to-retail services).

Threats

- Little opportunity for expansion of retail area, given historic street pattern, without increasing walking distances and potentially diluting the concentration of activities.
- Lack of vacant units and inflexibility in the configuration of traditional buildings could limit inward investment.

Kirriemuir Town Centre SWOT analysis

Strengths

- Highest number of specialist independent retailers of all seven town centres. These give the town a distinctive identity and create reasons for visiting the centre.
- Levels of recorded town centre crime are fairly low, relative to other centres. Levels of shoplifting are amongst the lowest of the Angus town centres.
- Kirriemuir is the most well-connected of the smaller Angus towns, in terms of bus service provision. A large number of villages are connected to the town.
- The built heritage of the town centre creates a distinctive retail and leisure environment, thanks partly to the local geology (widespread use of red sandstone), but also prominence of striking buildings and structures and the closes. The built environment is an attraction in-itself.
- For the size of the town centre, there is a good range of food and drink establishments (including takeaways).
- Good range of visitor infrastructure (toilets, benches, bins), including a tourist information centre in a central location. The pedestrianised square provides a focus for activity and a sense of place.

Weaknesses

- A large proportion of vacant premises are former retail uses. This suggests problems with viability may concern retail rather than service uses.
- Pedestrian flow measurements were the lowest of the seven town centres, and the vacancy rate is the second highest (equivalent to Arbroath). This suggests that a lack of vitality is having a negative effect on the viability of retail premises.
- The small size of the town centre means that some types of shop are unrepresented, and others are represented by a single retailer. This restricts choice and may give local residents a reason to visit other centres (especially Forfar) to meet everyday retailing needs.
- The topography of Kirriemuir means that routes to/from the town centre may be problematic for the less mobile (e.g. Bellies Brae). Pavements are variable in width and this may hinder ease of movement.
- Some of the signage and shop fascias detract from the built environment. There is no broad consistency in terms of scale, colour or proportion of signage.

Opportunities

- The built environment, range of services and obvious investment in tourism create a town centre environment that would be appealing to new retailers.
- The good levels of accessibility by public and private transport modes provide an opportunity to create a sustained flow of visitors, which could increase occupancy levels.
- Within Kirriemuir, there is opportunity for an increased number and variety of retail uses, where these uses would appeal to residents and visitors alike.

Threats

- A preponderance of uses that cater mainly for tourists would limit the appeal of the centre to residents and reduce vitality in the low tourist season.
- The simultaneous requirement for increased occupancy levels and increased levels of custom, when each is likely to depend on the other, may make such improvements difficult to realise in times of economic recession.
- High vacancy rates increase the likelihood of planning applications for change of use from a commercial to a residential purpose. Such change of use may facilitate a decline in the vitality of the centre.

Monifieth Town Centre SWOT analysis	
<p>Strengths</p> <ul style="list-style-type: none"> • Monifieth has the lowest vacancy rate of the seven Angus town centres. This also means there are very few vacant units (because of the small number of shops). • Although there are no council-operated public car parks in the centre, there is parking at Tesco and at the parade of shops. The town is also connected with Dundee, Carnoustie & Arbroath by bus. • Pedestrian access to the town centre from the east, south and west is made easy by the lack of adverse gradients. • Monifieth has the lowest levels of recorded town centre crime of all seven Angus towns. • There is a greater emphasis on convenience retailing than for many other Angus town centres. The centre is capable of serving many of the everyday needs of local residents. 	<p>Weaknesses</p> <ul style="list-style-type: none"> • The built environment is generally low in quality, despite some attractive red sandstone properties on the north side of the high street. The lack of a sense of enclosure, the functional design of many properties, and the visual dominance of cars in the central parade of shops detract from a sense of place. • There is little public space and visitor infrastructure. The facilities are not obvious to the first time visitor, and are located by the library at the far east of the town centre. • No specialist independent retailers were identified within the town centre. This indicates that there are few retail uses that would constitute a reason for visiting. • Levels of pedestrian traffic are variable throughout the centre. Close to Tesco and the parade of shops there are good prospects for passing trade. The eastern end of the high street is noticeably quieter. • Shops within the parade to the east of Tesco are set back from the street and are not particularly visible, because of the covered walkway immediately in front of them. This makes it more difficult for the first-time visitor to form an impression of these retailers.
<p>Opportunities</p> <ul style="list-style-type: none"> • The low quality of much development on the southern side of the high street makes this town centre very suitable for regeneration, to improve the town centre environment. • Town centre facilities and commercial uses could be better integrated, as part of any regeneration scheme. • The high street acts as a through-route between towns/places to the east and Dundee (although this function has long been usurped by the A92, the high street still carries a reasonable level of traffic). This may present opportunities for passing trade. • The population of Monifieth is greater than that of Brechin & Kirriemuir (2009 Small Area Estimates, Angus Council). Should the future bring an increased incentive to shop locally, the resident population would provide a large customer base, relative to the number of existing shops; this suggests that expansion could prove financially viable. • The current Angus Council-led regeneration scheme, which will improve the public realm, should assist with improving the townscape. 	<p>Threats</p> <ul style="list-style-type: none"> • The small physical size of the central area is such that the loss of the supermarket or the parade of shops would seriously undermine the town centre, in terms of vitality and viability. Without either one of these developments, there may be little reason to visit for shopping purposes. • The reliance on convenience shopping and the lack of public space restricts the function of the town centre; it does not feel like a place to dwell, but to satisfy everyday needs. This limits its appeal and thus its potential future vitality. • As with other small town centres, Monifieth is reliant on particular retailers to maintain a diverse retail offer.

Montrose Town Centre SWOT analysis

Strengths

- Pedestrian flow measurements indicate that Montrose town centre is one of the busiest, in terms of footfall, during summer weekdays.
- The town centre has the largest proportion of convenience and comparison retail units of all Angus town centres.
- The built environment is of a high quality, with distinctive landmarks and vistas and a heritage that is well explained. All of this enhances the visitor’s experience.
- Good level of visitor infrastructure (benches, bus shelters, phone boxes). Public open space near the council offices and the church is well used.
- Montrose is well connected to other towns/places by public transport modes (bus & train). There are many two-hourly (i.e. frequent) bus services.
- There is a good range of food & drink establishments, which are well distributed throughout the town centre.

Weaknesses

- Montrose has the second lowest number of specialist independent retailers and the largest number of national multiples (retail) of all Angus towns. This means that the retail offer is the least distinctive of the seven towns. However, the centre does not just provide the same shops and services as “everywhere else”.
- Montrose experienced the second highest levels of reported shoplifting of the seven town centres (2008-2009), and the centre had more recorded town centre crime than Forfar.
- The town centre has the second highest number of vacant retail units of the seven centres.
- There is relatively little council-operated off-street parking, compared to Forfar and Arbroath. Parking at Tesco, Sommerfield and outside Argos & Gillies supplements this provision; but only for customers of these stores. There is some on-street parking.

Opportunities

- High levels of pedestrian flow and the attractions of the built environment create a vibrant and attractive centre for inward investment.
- Although the town has a reasonable number of discount, charity and national multiple shop units; there may be opportunities for specialist independent retailers to add variety to the centre.
- Some of the closes are attractive; others less so. As important linkages between different areas of the centre, some could be improved (i.e. made more welcoming) and could be better signposted.
- The relatively large number of residential properties within the town centre provides a large number of potential customers for any new businesses.

Threats

- Although the town centre environment and history of Montrose represent assets for attracting visitors, many of the shops serve the needs of residents (evidenced by the high number of national multiples, discount stores and charity shops). This could make the centre susceptible to changes in shopping habits (increased mobility of modern consumers, rise of internet shopping).
- There are some modern unsympathetic insertions to the town centre, although most of these are not on the High Street. Incremental erosion of its character could threaten the distinctive nature of the retail environment.

APPENDICES

For sake of convenience, background data associated with the 2010 town centre health checks is contained within separate appendices to this report.

2010 ANGUS TOWN CENTRE HEALTH CHECKS

APPENDIX 1

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On-site Survey Questionnaire Results: 2010 Town Centre Health Checks

Matrix of scores

Town Centre	Scores for Indicators								
	Overall cleanliness	Property appearance, condition & maintenance	Quality of built heritage	Evidence of recent investment by retailers	Availability & quality of visitor infrastructure	Presence & quality of open space	Ease of movement for pedestrians	Access to/from/within the town centre	Availability of food & drink facilities
Arbroath	3 Street is dirty in places (cigarette butts and chewing gum). Fly posters on vacant premises. Buildings can be quite dirty. Very little graffiti. No overflowing bins.	2 Many properties are well cared for (some only ok). Paint flaking, damaged drainpipes, unclean & broken windows on first floor. Fascias a variety of styles and colours – no consistency. V. poor quality; adds to visual confusion.	3 The abbey provides a pleasing backdrop to the north and the traditional or Victorian buildings in south are of visual interest. Modern high street insertions detract from TC environs. There are visual landmarks that provide legibility. Views into TC are enticing – from TC are at times poor. In places, extensive and appropriate use of local stone, slate, red brick chimney. Sash & case windows in south predominate. Lots of interesting details, but some are “anywhere” buildings (Argos)	3 Fair amount of evidence. New premises have recently opened (Nickel ‘n’ Dime; Cornerhouse Deli) and activity observed re renovation of units. There seems to be a number of recent vacancies (high turnover?) Some frontages need cleaning/repainting but a good number appear clean & recently painted or installed. W H Smiths needs improving.	4 TIC now moved to harbour, but there are a number of information boards and pedestrian signs. Abbey poorly signposted. Bus stops and shelter observed close to shops. Public toilets (Corn Exchange) v. good but small. At least three payphones at various points. Good no. of benches (reasonable condition). TIC not v. accessible for those visiting TC, but this is due to its strung out nature.	3 Not much litter within public open space. Infrastructure well maintained. Much of the open space is just a thorough-fare – there are only incidental areas to linger. Large green spaces close to TC (Victoria Park). Within TC, spaces are hard-surfaced and utilitarian. Open space does not contribute much to townscape; does not provide a visual feature (even Kirk Sq.).	4 Main (busy) areas have wide pavements, dropped curbs generally in appropriate locations (desire lines), but not consistently so. On-street parking can impede movement in south. Terrain is gently undulating, but no real difficulties with gradients. Surfaces are generally in good state of repair, although sometimes slightly uneven. Many shops have street-level access. Traffic levels noticeable at times (south area) – but not significant barrier except at transition to pedestrianised area.	4 A lot of on-street and off-street parking – well used, but is it enough? Would seem to be operating near capacity. Car parks are accessible and have good access to TC; also those associated with Lidl and Co-op (restricted). Bus stops well located for shops & well used (some shelters). Bike parking provided within pedestrianised area and at Corn Exchange. No major difficulties for pedestrian access from beyond TC. Many CCTV cameras – generally feels safe.	3 Not many restaurants. Lots of cafes and takeaways (nothing equivalent to Chapelbank Hotel). V. few high quality eateries. Pubs are generally for drinking only – v. few places for families if don't want to visit a café. Places to eat/drink (aside from takeaways) north and south of pedestrianised area. Many of these places fairly busy.
Brechin	4 Reasonably clean. Little litter in street, good no. of bins (not overflowing). Limited graffiti in closes, but overall v. little. Signage (street and building) presents visual clutter.	2 Various states of repair – some buildings appear well-maintained, others looking tired and in need of renovation. Moving from Clerk St to Swan St, building quality deteriorates. Some properties are being improved by THI. Some properties boarded up, but tucked away. Continuous retail frontage on Swan St & St David St, but not Clerk St (also variable building line). Some signage ill-fitting and out of place (colour).	4 Distinctive urban environment: gables fronting High St, widespread use of local sandstone. Key vistas coming along Church St (THI buildings). Strong building line and narrow closes provide a distinct character to core area. Materials used in retail/service properties sometimes at odds with character of building (RBS, takeaways, Nickel ‘n’ Dime). There is no common style to fascias. Various materials used for pavement surfaces. Panmure St good e.g. of local character being respected; Clerk St the reverse.	3 Premier convenience store about to open, Boots arrived not long ago (18 months-2yrs). Polish food store is another new addition. Few properties are derelict, which indicates that vacancies are quickly filled. Boutique on High St (Kavak) appears new. Signage on certain units appears fresh, although these may not have been recently renovated.	2 No benches – some payphones (one on high street). Little in the way of tourist signage except in core area. No pedestrian signs at important junctions. One bike rack. Some tourist signs are road signs (perhaps not noticeable for pedestrians?) Focus for visitor infrastructure is High Street. Toilets tucked away and not well signposted. Other areas of TC have v. little. Nowhere to linger.	2 V. little public open space – Mercat cross, but this is not a place to linger. Green space (Skinners Burn) nearby. No reason to dwell on street & not inviting. Closes provide car free public realm, but some can be unsightly and unwelcoming. Broken surfaces and bins cause obstructions. Mercat cross does not serve a useful function, except as visual landmark (divorced from pedestrian environment).	3 Variable quality of hard surfaces – on Swan St, patched tarmac. Pedestrian crossings in Swan St & St David St, but narrow pavements at important junctions. Level of traffic noticeable, but quiet enough so that pedestrians are not forced to use the crossings. Some closes are narrow with broken surfaces and steps. Junction of Clerk St, Panmure St, Swan St not easy for pedestrians to navigate & topography of Swan St to High St presents difficulties.	3 Two car parks within TC, one large car park on edge. Convenient, yet quality of connection is poor or uninviting – access for disabled, those with prams may be difficult. On-street parking is available on Swan St, High St & Clerk St – but not St David St. Delivery vehicles make crossing street difficult in places. Bus stop on Clerk St conveniently located for shops, given position of crossing. Nowhere for coaches to park. Links to TC feel safe (if use crossings). Topography entering High St and sharp corners hinder movement.	4 Many places to sit in at lunchtime & in the evening (pubs, hotel, restaurant, cafes). Two bakeries for lunchtime trade – but little else. Facilities are well distributed (High St, Swan St, Clerk St, St David St). Surrounding places of work are small-scale services, except schools. Connections with these places are generally good.
Carnoustie	4 Some litter in certain places (outside SPAR, bus stops). Aside from this not much litter on streets. In general, bins not overflowing and well located (a good number). Buildings generally clean and street furniture not stained or damaged.	3 Building opposite SPAR – corner Queen Street & Palmer Street – not in a good state of repair. Paint flaking, vegetation in guttering. Broken window on High Street near this building (vacant premise). There is not a continuous retail frontage throughout the centre (small interruptions from residential use). Fascias & signage are generally poor – no consistency, bright garish colours, range of font sizes, some signage & finishes to detriment of building (Lloyds TSB). Generally worse in west compared to east., where properties are clean and well-maintained.	3 Although burgh is not historic, Victorian architecture does add interest for the visitor. The old petrol station provides a striking landmark. Trees, vegetation add colour and interest to urban realm. Linear street pattern provides views at a distance to provide legibility. Quite broad pavements, strong building line, except in places (peripheral west). Local stone widely used and in-keeping with surrounding areas. Shop fronts often let down the High St.	3 Some recently painted retail premises (pet shop). Many shops are well established. New betting shop nr Ferrier St (outwith town centre). Investment tends to be local and small-scale (Scotch Corner Café has extended). No real significant additions to retail environment in recent years – but some turnover. No properties observed undergoing renovation or displaying “coming soon” notices. Buildings on corner of Queen St have been vacant for long time.	2 Tourist information board and information available at library. No street signs aside from those for motorists – link between TC and beach area is poor, not well indicated for pedestrians. Town should meet ancillary requirements of golfers. No payphones noticed within TC itself. Public conveniences v. poor – dark, unclean, smelly. Bus stops have bus shelters that are painted to match other street infrastructure. Benches at opposite ends of TC – nowhere to linger within central area. Superficial aspects done well, but not fundamentals.	3 Open space present on periphery of TC, but little in central area, except outside library and old petrol station. Private open space contributes to urban realm (visually speaking). Open space is landscaped (hard & soft) and does provide function for TC users – a place to linger and gather. All areas well-maintained & clean. Remembrance garden has no visitor infrastructure – but perhaps this is to respect its function? Reasonably accessible because of size, although some changes in level/steps. Public space is not always prominently located.	4 Topography is v.flat – level throughout – textured edges, dropped curbs but some street corners hinder movement for pushchairs and wheel chairs (v. sharp with little visibility). On-street parking does limit opportunities for crossing road, but carriageway is narrow and easy to cross, when there are gaps in traffic. Surfaces uneven in places and patched. Small units, narrow doorways for accessing shops by wheelchair. Mix of street level access and steps (more of former).	5 Car parks quite well used – most have good pedestrian links. There is also lot of parking on seafront – so TC car parks cater for TC trade. Bus stops well located for shops (well used). Rail access close to town centre (on main line). Bike parking outside library and SPAR. TC is fairly well positioned relative to its surroundings – no steep gradients. No barbed wire & screens along main access routes. Generally pleasant walkways into town – these feel safe.	3 A few cafes, a number of takeaways, bakeries, restaurants in terms of pubs/hotels & Indian restaurant. Bakeries seemed v.busy; takeaways predominate. Would seem to cater for local trade rather than visitors, given no. of these premises. These places are well distributed and therefore easily accessible.
Forfar	3 Backland areas generally clean & tidy – East High Street appears quite clean, free of litter. Lots of litter bins, none overflowing. More chewing gum, cigarette butts than other towns though. Some of the public seating is drab, dirty and uninviting. Some buildings are looking tired, but others in good condition. Variable throughout centre.	3 Windows mainly clean & intact. Some properties on East High Street appear well-maintained (recently painted, window boxes). Some superficial damage, but most buildings well cared for. No consistency in terms of style, colour or font, with regard to fascias. Some unattractive buildings close to council offices; library and post office are functional additions to West High Street.	4 Many landmark buildings and meandering nature of streets gives distinctive built environment. High chimney stacks, common use of materials (local stone, slate) sash & case windows all add to distinctive appeal. Buildings generally hard on heel of pavement – strong building line, although some variations (East High St). Landmark buildings provide visual clues as to the extent & focus of TC activity. Buildings turn the corner well – present public with retail façade. Building details are interesting and draw the eye (Meffan Institute). There are some unsympathetic additions.	4 A number of new shops on West High St, in the centre and on East High St. Specsavers, Alworths, Pretty Woman are all relatively new. Some new fascias & much of the signage is clean/freshly painted. Not many vacant premises; pub on Castle St being renovated.	4 Signs for Tourist Information, but its not apparent where it is! Bus stops on East High St good quality/well maintained, but incongruous. Tourist info boards in car parks (information on history of the burgh). No signs pointing to town centre from periphery. A number of payphones in centre. Superloo at the Myre car park. Benches are well provided but variety of different styles and many are worn.	3 Main areas are Little Causeway & outside Access Office. Little Causeway is difficult to navigate for those with mobility problems – but pleasant, quiet environment, although little animation (little town centre activity and dead space). New improvements at the Access Office increase pedestrian seating capacity and quantity of hard landscaping (act to enlarge the pedestrian realm). Little Causeway not obvious for visitors, although the Access Office provides convenient meeting point. LC could/should be signposted.	3 Dropped curbs are present along main pedestrian routes. There are only a few pedestrian crossings, but there are traffic islands to assist pedestrians in the very centre. Road outside the Cross is difficult to negotiate away from the pelican crossing. Some of the corners on pavements are sharp and the pavement itself narrow in places. Potential for pedestrian/vehicle conflict at some junctions (access to Myre/Castle St & High St). Paved surfaces generally quite good (there are limited steep gradients). Signage for pedestrians variable.	4 Good quantity of car parking spaces – car parks are well used & well located. Some limited on-street parking (time limited). Taxi rank available outside Haldanes/Thomson. Bus stops well located for shops but perhaps not Castle St shops. Some provision for bikes outside Clydesdale Bank, Meffan & swimming pool. Access to TC from other areas generally pedestrian friendly. Steep rise on Couties Wynd (from South).	5 Good selection of pubs, cafes, restaurants, sandwich shops throughout TC. There are large employers, offices within walking distance of these facilities.

Kirriemuir	5 Some limited graffiti on buildings/signs. Generally very clean – pavements spotless. Buildings/fascias in main square clean. Buildings in back alleys are less clean (water damage, vegetation in guttering). Public bins not overflowing. Only 'semi-private' closes leave something to be desired.	3 Noticeable greenery in urban environment (hanging baskets). Buildings appear reasonably well cared for, except on periphery (Glengate). Hooks Hotel in process of being redeveloped. Even vacant premises are not in a state of obvious deterioration. Some broken/boarded windows in centre and periphery. Boarded up properties are noticeable and do detract from townscape. Retail frontage more or less continuous through centre, but no consistency with fascias. Some ill-fitting with property. Some interventions are unsympathetic, but others tastefully done. No real town theme or pattern.	5 A great number of visually important buildings and quaint closes. Vistas including clock tower on old parish church provide means of orientation. In centre, the TIC/Museum is an obvious landmark. Strong building line – interesting mix of property styles (gable-on and side-on). Interesting views along High St/Bank St formed by strong building line & details on properties. Good use of local sandstone – very distinctive and adds visual warmth. Other materials inc. slate & harl. Sash & case windows predominate. The few national multiples do not add much visually speaking. Shop fronts not always sympathetic – some very simple & restrained.	4 Two properties coming soon, plus Hooks Hotel is being refurbished, to open as a dental surgery. Seems that a number of new shops have recently arrived (Random Recycle, Bumbles) and signage looks fresh. No new properties within town centre and no real evidence of re-configuration (Cumberland Square – 2000?). Some vacant properties are coming back into use.	5 A good number of benches, bins, one payphone, public toilets by car park. Signs to direct pedestrians in central area. TIC and bus stops are in the very centre of town, thus very well located for visitors. Both well used. Quality of infrastructure good to very good. No bus shelters, but is the scale of the centre such that a shelter would look out of place? Information boards present.	4 Main square is very useful as a gathering/meeting point. Statue, planting and trees provide visual interest. High quality materials used (stone flags, curbs and cobbles). Free of rubbish. Space is very accessible and constitutes the centre. Roods provides visually attractive public space (for purposes of circulation). All of this adds to townscape, although more greenery may add greater variety and contrast. Surfaces on Roods not traditional materials (detracts from environment).	3 A mixed bag. Traffic not as intrusive as might expect given proximity of highway to pedestrians. Four pedestrian crossings, but roads are quite narrow and relatively easy to cross. Pavements of variable widths – sometimes v. narrow. No gradient in centre, but slight positive gradient heading north, before pedestrians meet a steep hill. There aren't always dropped curbs where you want them to be. Generally access is taken from street level. Bellies Brae car park separated from centre by steep incline. Generally surfaces in a good state of repair. It's not obvious to the visitor whether some of the closes provide public access.	4 There are car parks to north and south and also within centre. Generally car parks are short stay, except Bellies Brae (which is connected by steep incline to town centre). Plenty of on-street parking inc. disabled bays & a taxi rank. No taxis seen. Bus stops well located for shops TC is at the bottom of one slope and the top of another (north and south). The TC is topographically-speaking an island. Bike storage available in TC square. Generally, access routes feel safe (they are overlooked or have an open-aspect).	4 A number of pubs (Airlie Arms, The Thrums), cafes (Visocchi's, Auld Surgery), bakeries, The Swan (restaurant). A good number of takeaway food outlets (Indian, Chinese). Pubs & takeaways constitute night time economy. Few restaurants for night time economy. Food outlets well spread out and well located for places of work.
Monifieth	4 Very little litter on the street. No obvious graffiti etc. There are a good number of bins, which are strategically located (near shops and car parking).	3 Balustrades on building (north side of High Street) are looking rusty, some attention required for some of the older properties. Broken window on Church Hall. Within arcade of shops, signage is clean and well-kept. Retail frontage is broken on north side of High Street by residential properties; and by voids created by car parking to the south. Design of modern shopping arcade provides a car-dominated appearance. Fascias generally fit the buildings but are a mix of colours and sizes.	2 Red sandstone properties are distinctive on the north side of the High Street. No distinctive properties on the southern side of the street (this area was less intensively developed, according to photographic evidence c. 1900). Tesco is a retail anchor, but not a visual landmark (not always visible). Range of building materials from different ages, juxtaposed with one another. The built environment offers little shelter for public realm, due to low level of development on south side. Traditional form of development in evidence on north but not south side of High Street.	4 Many signs within arcade look new, or recently replaced/maintained. Bakers on N side of street looks to have been recently repainted. Properties to east of Reform St are less modern in appearance (takeaway. Florist, financial offices). The dental clinic and Monifieth Dentist premises have been recently refurbished.	3 Only one bench, one payphone linked to tourist information. There are some public toilets, although these are "hidden away" (far east of town centre). Bus stops are well located for access to library and supermarket (presumably the two biggest anchors).	N/A	3 High St is a busy through route, although there are two pelican crossings. Difficult to cross for those with restricted mobility. Traffic levels noticeable. Pavements in good state of repair (few undulations). High St itself is flat in profile although access to centre from north is by relatively steep incline. Entrance at street level for many properties. Disabled access to arcade made difficult by stairs and potholes in car park. Toilets and TIC not well signposted from Tesco/shopping arcade	4 Good level of car parking provided. There is limited on-street parking (inc. disabled bays). Car parks are well used, bus stops well located. No bike stands spotted, but cyclists were noticed. Pedestrian access from residential uses is both on a level and at bottom of hill. Most would seem to access by car or bus – CCTV and overlooking of pedestrian routes gives safe feel.	3 Butchers adds variety. Also a café, three pubs, only one restaurant and a couple of bakers. Food and drink outlets are well-distributed. These facilities are easily accessible to local places of work (council offices, nursing homes). Nowhere for people to consume their purchases. Takeaways not open during daytime hours. Pubs appear to be drinking establishments.
Montrose	4 Bins spaced regularly & not overflowing. Didn't observe much litter – some round places where people congregate. Some graffiti in little frequented closes. Benches in reasonable state of repair – some better than others. Some buildings in need of maintenance – but more at upper levels than ground floor.	4 No consistency in terms of shop front styles (lettering, size, colour). Not perhaps as noticeable, as a negative aspect on townscape, relative to other centres. You might expect some variety - tones & colours are tasteful compared to other towns. Ground floor - clean windows and fascias (even some vacant units). Upper floors a little more variable (some broken windows). Discolouring of stone, paint peeling, railings on upper floors rusting away. Variety of building colours - no theme. Windows are regular in appearance (there is a typical size of opening).	5 The steeple & townhouse provide strong visual landmarks. Three storey buildings provide a means of enclosure. Some of the buildings show Flemish/Dutch influences (gable ended properties). Perhaps a little plain at times – although some more elaborate Victorian architecture (e.g. library). Building materials include stone, slate & harl. Some modern brick and manufactured stone. Sash & case windows, chimneys and dormers of traditional style. Details on corners could catch the eye. Also, closes and street patterns provide distinctive environment. Heritage plaques add interest.	3 Some 'coming soon' notices e.g. George St & Castle Place. Picture House recently remodelled & painted. Noticed a shop being renovated in the northeast. Not many shop fronts in need of replacement - some in peripheral areas. Madisons Cafe & Bistro relatively new. New Look a reasonably new insertion (reconfiguration of Scotmid). Argos, Gillies quite modern retail units - but have been open for some time (Argos in advance of Gillies; see Google Street View).	4 TIC still in use? [yes, in museum] Benches by church, on High Street, outside library, Castle St – on edge and in centre. Scope for some more? Phone boxes (traditional), pedestrian signs (toilets well signposted), information boards. Bus stops including shelters on both sides of High St. Toilets by car park (a little peripheral), but disabled WC in town house. Bike stands on High St (WH Smiths & further south). Information plaques (historic information) provide interest. TIC not centrally located.	4 Open space in vicinity of town house is generous in size, although traffic presents barrier to pedestrian movement. Monuments, statues, young trees – street furniture well presented. Some of the closes very attractive & well maintained except by M & Co/Argos. Some are narrow and have steps – not good for less mobile. Park on southern periphery (nr Tesco) well-maintained and attractive (this is a place to linger). The archways between the church & TC are distinctive and enticing – they draw the visitor through into the TC. Closes used as a means of communication – a functional purpose & well used. Courtyards on heritage trail interesting but are private (or have that feel). Difficult to distinguish public from private space.	4 Wide pavements – pedestrian crossings both formal and informal (pelican crossings and traffic islands). Dropped curbs in good locations, ramp down to pavement on western side. On High St surfaces relatively even, but not always in other areas (Baltic St, near John Crawford). Street level access or ramps (banks) – very good for disabled, except steps down from road (ramp is positioned by disabled bay). Changes in width off High St. Narrow width on Murray St could be an issue. High St on slight ridge. Traffic levels quite heavy in centre.	4 Car parks – there are some on periphery of TC. Plenty of on-street parking and this is well used. Also car parks associated with stores (Argos, Scotmid). Car parks seem to be well used. Tesco car park could be useful for TC as well. Bus stops are well located. High St accessed by slight rise west/east. Closes are not overlooked, so not v safe, but alternatives are available (John St). Permeability from west not as good as from east – many closes terminate heading west off High St.	5 Hotels, restaurants, takeaways, pubs, cafes, chip shop, bakers. A good range and well distributed along High Street. Angus Council & High School only large employers located within/adjacent to town centre; but reasonable quantity of on- and off-street parking for lunchtime trade.

Results of on-site surveys – hierarchies based on scores:

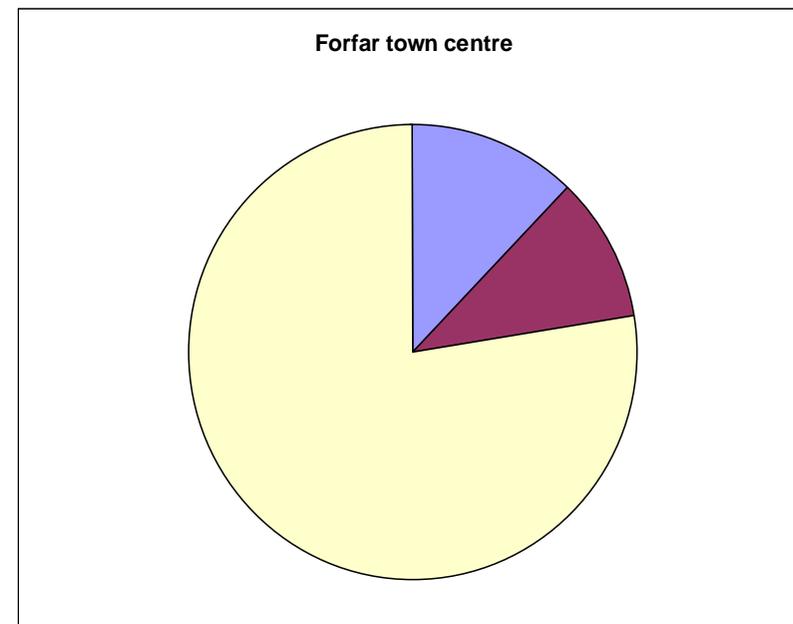
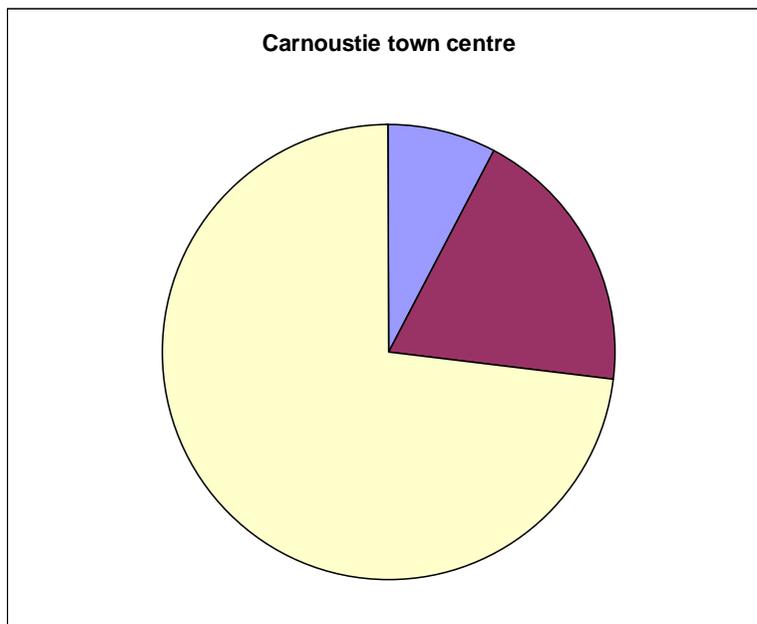
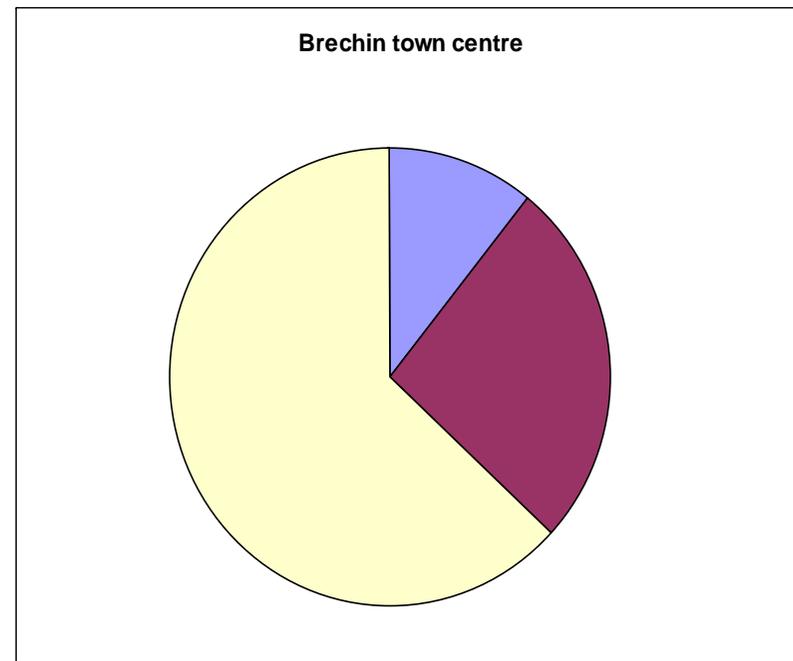
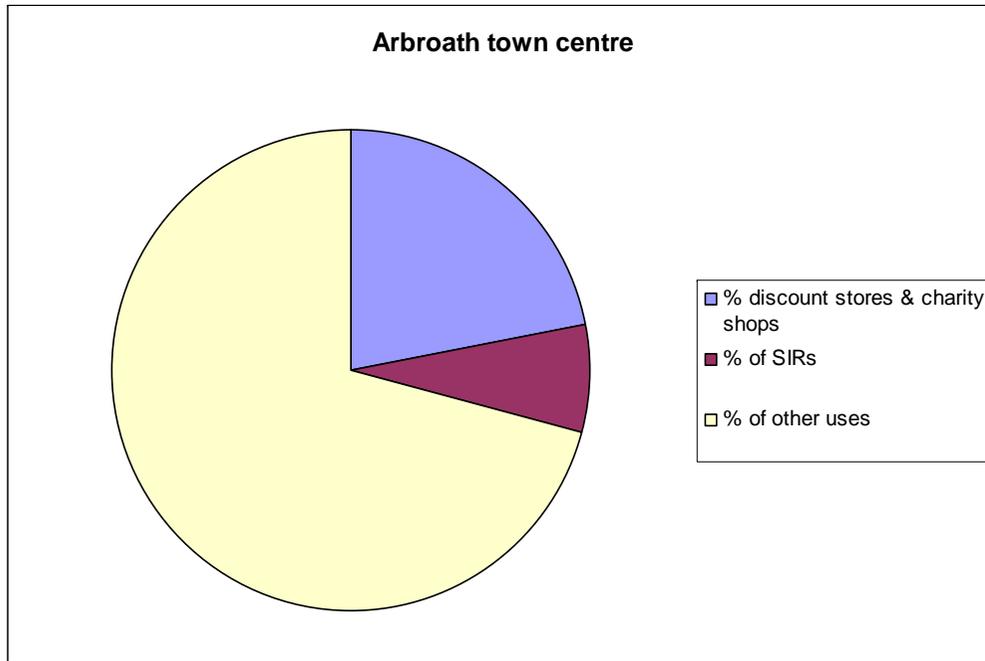
Indicator	Hierarchical position (all town centres; 1: highest, 5: lowest)				
	1	2	3	4	5
Overall cleanliness	Kirriemuir	Brechin, Carnoustie, Monifieth, Montrose	Arbroath, Forfar		
Property appearance, condition & maintenance	Montrose	Forfar, Carnoustie, Kirriemuir, Monifieth	Brechin, Arbroath		
Quality of built heritage	Kirriemuir, Montrose	Forfar, Brechin	Carnoustie, Arbroath	Monifieth	
Evidence of recent investment by retailers	Forfar, Kirriemuir, Monifieth	Arbroath, Brechin, Carnoustie, Montrose			
Availability & quality of visitor infrastructure	Kirriemuir	Arbroath, Forfar, Montrose	Monifieth	Brechin, Carnoustie	
Presence & quality of open space	Kirriemuir, Montrose	Arbroath, Carnoustie, Forfar	Brechin		
Ease of movement for pedestrians	Arbroath, Carnoustie, Montrose	Brechin, Forfar, Kirriemuir, Monifieth			
Access to/from/within the town centre	Carnoustie	Arbroath, Forfar, Kirriemuir, Monifieth, Montrose	Brechin		
Availability of food & drink facilities	Forfar, Montrose	Brechin, Kirriemuir	Arbroath, Carnoustie, Monifieth		

2010 ANGUS TOWN CENTRE HEALTH CHECKS

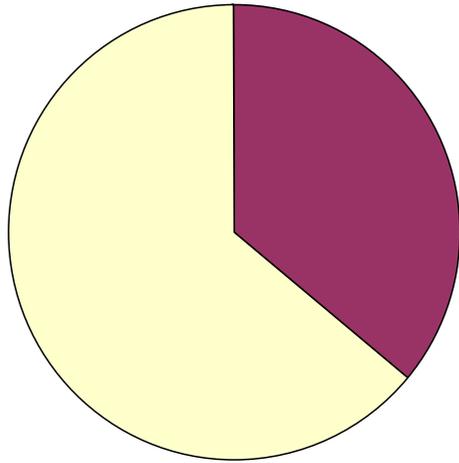
APPENDIX 2

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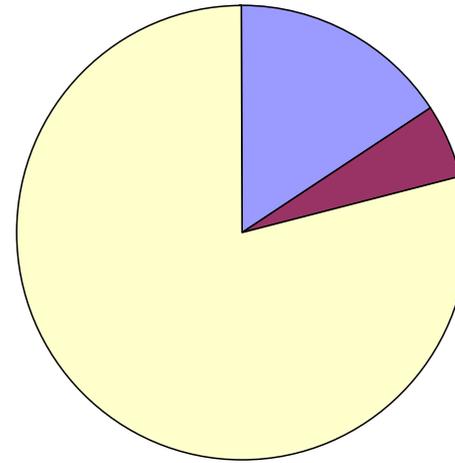
Figure 1: Pie Charts to Show the Proportion of Discount Stores, Charity Shops, Specialist Independent Retailers and Other Retail Types, in the Angus Town Centres



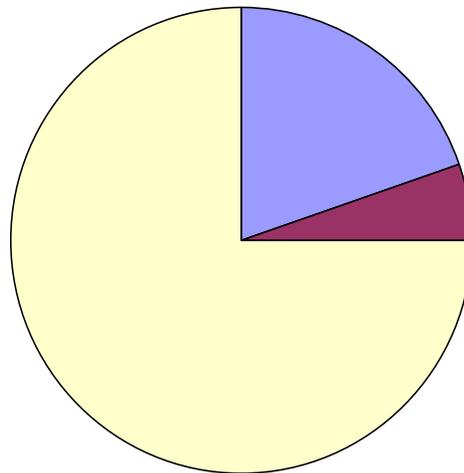
Kirriemuir town centre



Monifieth town centre

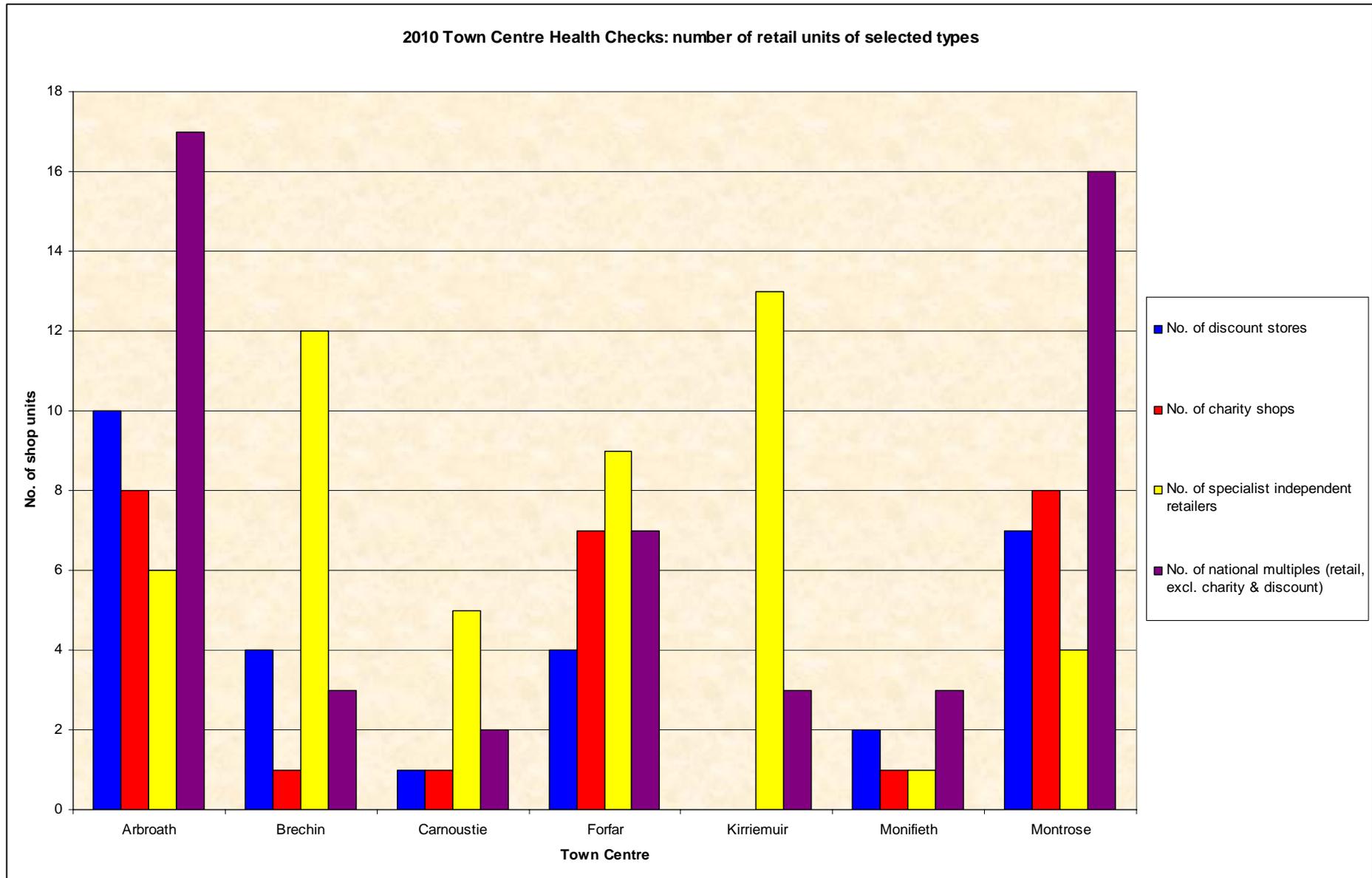


Montrose town centre



- % discount stores & charity shops
- % of SIRs
- % of other uses

Figure 2: Graph to Show the Number of Discount Stores; Charity Shops; Specialist Independent Retailers; and National Multiples (excluding national charities and discount stores) in the Angus Town Centres



2010 ANGUS TOWN CENTRE HEALTH CHECKS

APPENDIX 3

Range of Shops & Services

The table overleaf provides a full list of the retail codes used in the 2010 Town Centre Health Checks, within Angus. These codes (known as Unit for Retail Planning Information (URPI) codes) are taken from Angus Council's Retail Floorspace Survey, which is an annual survey of commercial uses within the seven towns and at the Angus Gateway development.

For the graphs of this appendix, the URPI codes are arranged by the broad categories of convenience; comparison; service; sui generis; and vacant uses. Each broad category is as follows:

Broad Category	Constituent URPI codes
Convenience	010; 020; 040; 041; 042 & 091
Comparison	000; 050; 051; 052; 053; 060; 061; 062; 070; 071; 072; 080; 081; 082; 090; 092; 093; 094; 095
Service	111; 112; 113; 114; 120; 121; 122; 123; 124; 125; 126; 127; 128; 130; 131; 132; 133; 134; 135; 136; 137; 138; 139; 140; 141; 142; 144; 145;
Sui generis (e.g. workshops)	143; 146; 147
Vacant	210; 211

The graphs show the number of units within each URPI classification as well as a moving average, which shows major changes in the number of units across codes and indicates any trend between/within the broad categories. These graphs display the full results of the 2010 town centre survey, in terms of the range and number of commercial uses.

The following is a list of URPI codes and their associated descriptions:

URPI CODE	DESCRIPTION
0	NOT KNOWN OR VARIETY
10	FOOD
20	ALCOHOLIC DRINK
40	BOOKS, NEWSPAPERS AND MAGAZINES
41	BOOKS
42	NEWSAGENT, MAGS
50	CLOTHING AND FOOTWEAR
51	FOOTWEAR
52	MENS WEAR
53	WOMENS, GIRLS, INFANT WEAR
60	FURNITURE, FLOOR COV, TEXTILES
61	FURNITURE
62	HOUSEHOLD TEXTILES
70	RADIO, ELECTRIC & OTHER DURABLES
71	DOMESTIC APPLIANCES
72	RADIO TV MUSICAL & PHOTOGRAPHIC
80	HARDWARE & DIY SUPPLIES
81	CHINA, GLASS & HARDWARE
82	DIY & DECORATING SUPPLIES
90	OTHER GOODS
91	MATCHES, SOAP ETC
92	CHEMIST
93	JEWELLERY ETC
94	RECREATIONAL & OTHER MISC. GOODS
95	CAR ACCESSORIES
111	BANK
112	BUILDING SOCIETY

113	INSURANCE
114	OTHER FINANCIAL
120	LEISURE
121	BOOK MAKER
122	VIDEO RENTAL
123	SNOOKER BILLIARD HALL
124	AMUSEMENT ARCADE
125	TV RENTAL
126	PUBLIC HOUSE
127	FITNESS CENTRE
128	OTHER LEISURE
130	MISCELLANEOUS/MEETING PLACE
131	POST OFFICE
132	PROPERTY CENTRE
133	RESTAURANT
134	CAFE/TEAROOM
135	TAKEAWAY FOOD
136	HAIRDRESSER
137	DRY CLEANER
138	LAUNDERETTE
139	SHOE REPAIRS
140	PRINTER
141	TRAVEL AGENT
142	STORAGE
143	OTHER MISCELLANEOUS
144	OFFICE
145	PROFESSIONAL SERVICES
146	PERSONAL SERVICES
147	PUBLIC SERVICES

Figure 1: Range of Shops & Services within Arbroath Town Centre, by Retail Category (URPI) Organised by Broad Category (Convenience, Comparison, Service, Sui Generis, Vacant)

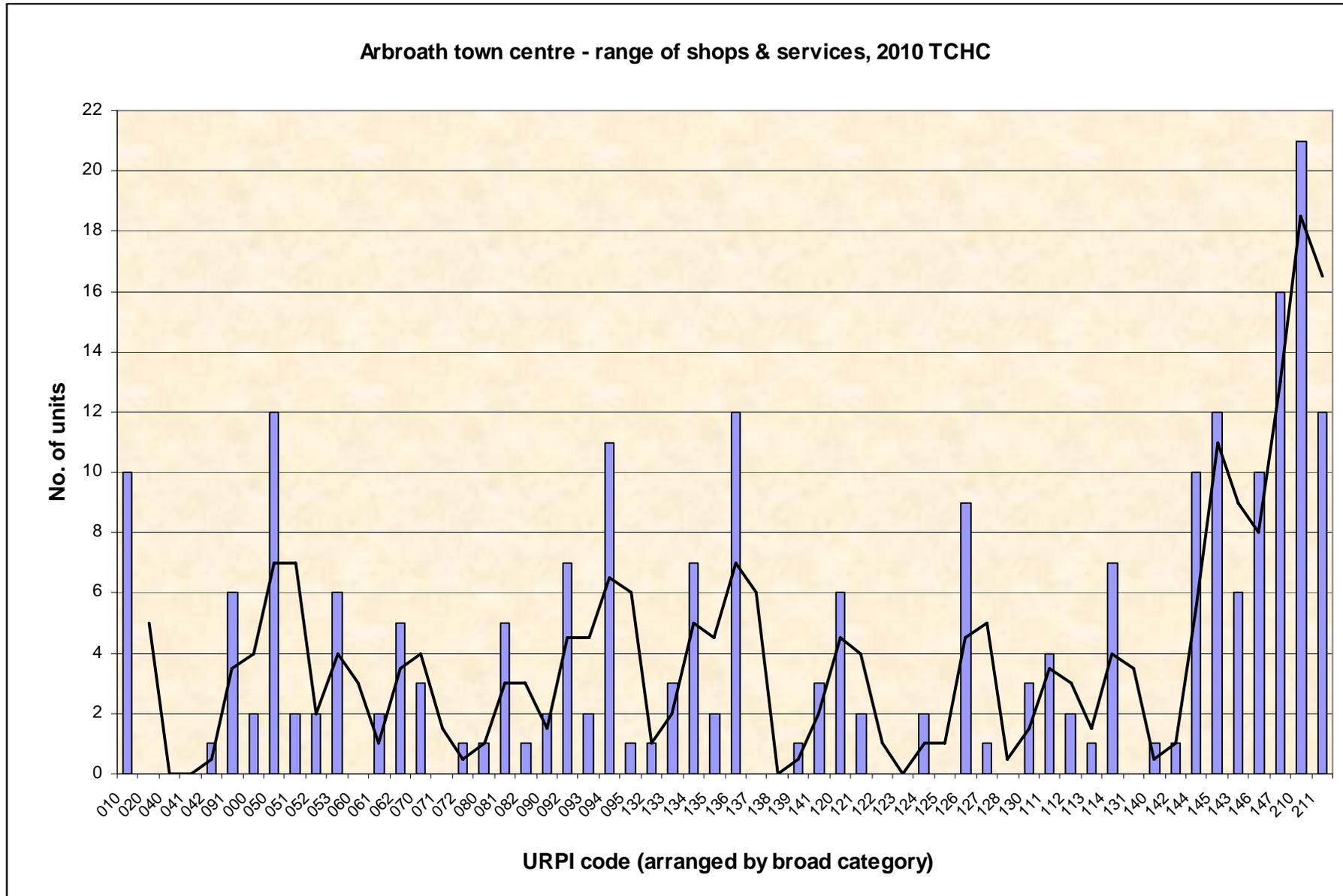


Figure 2: Range of Shops & Services within Brechin Town Centre, by Retail Category (URPI) Organised by Broad Category (Convenience, Comparison, Service, Sui Generis, Vacant)

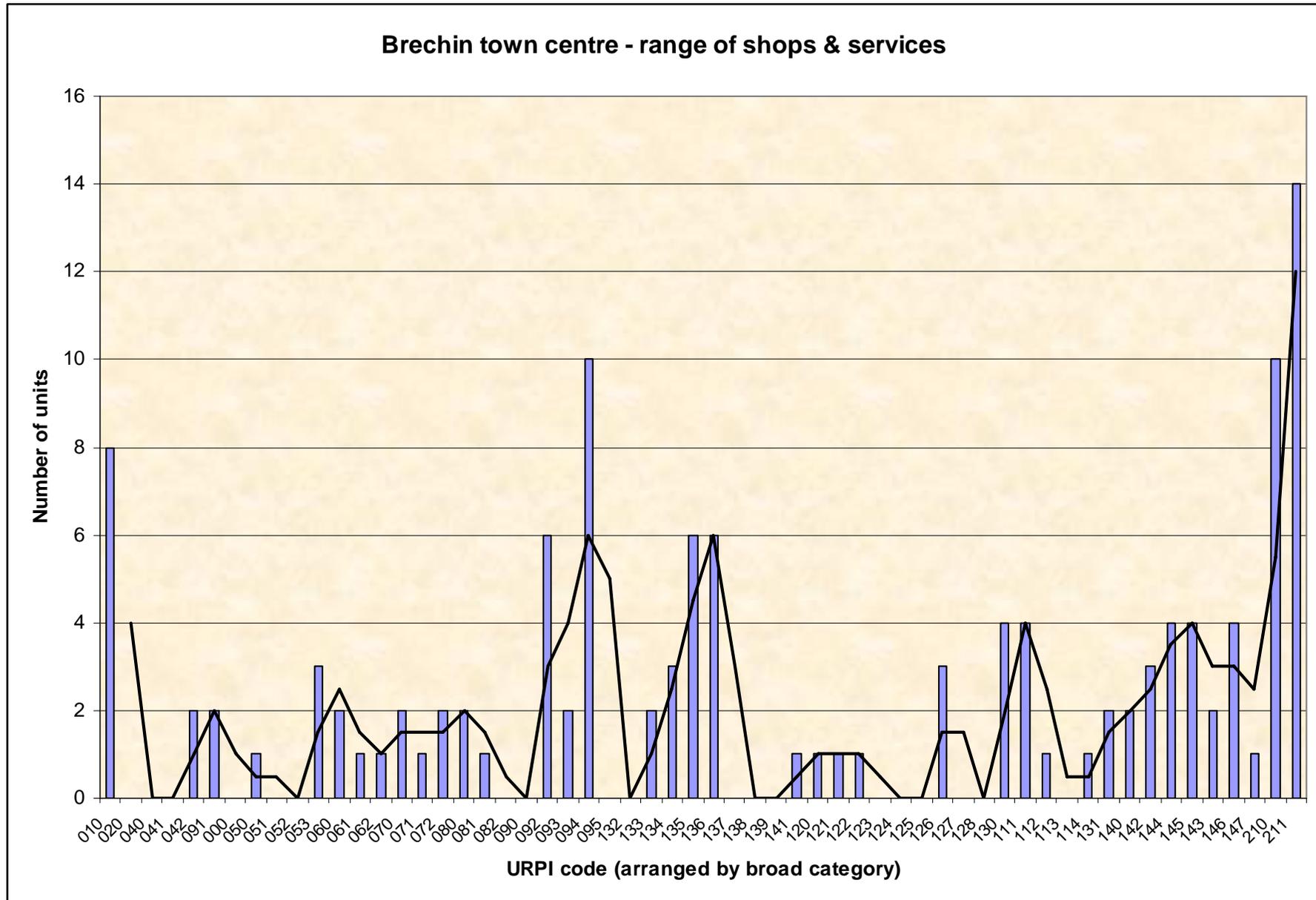


Figure 3: Range of Shops & Services within Carnoustie Town Centre, by Retail Category (URPI) Organised by Broad Category (Convenience, Comparison, Service, Sui Generis, Vacant)

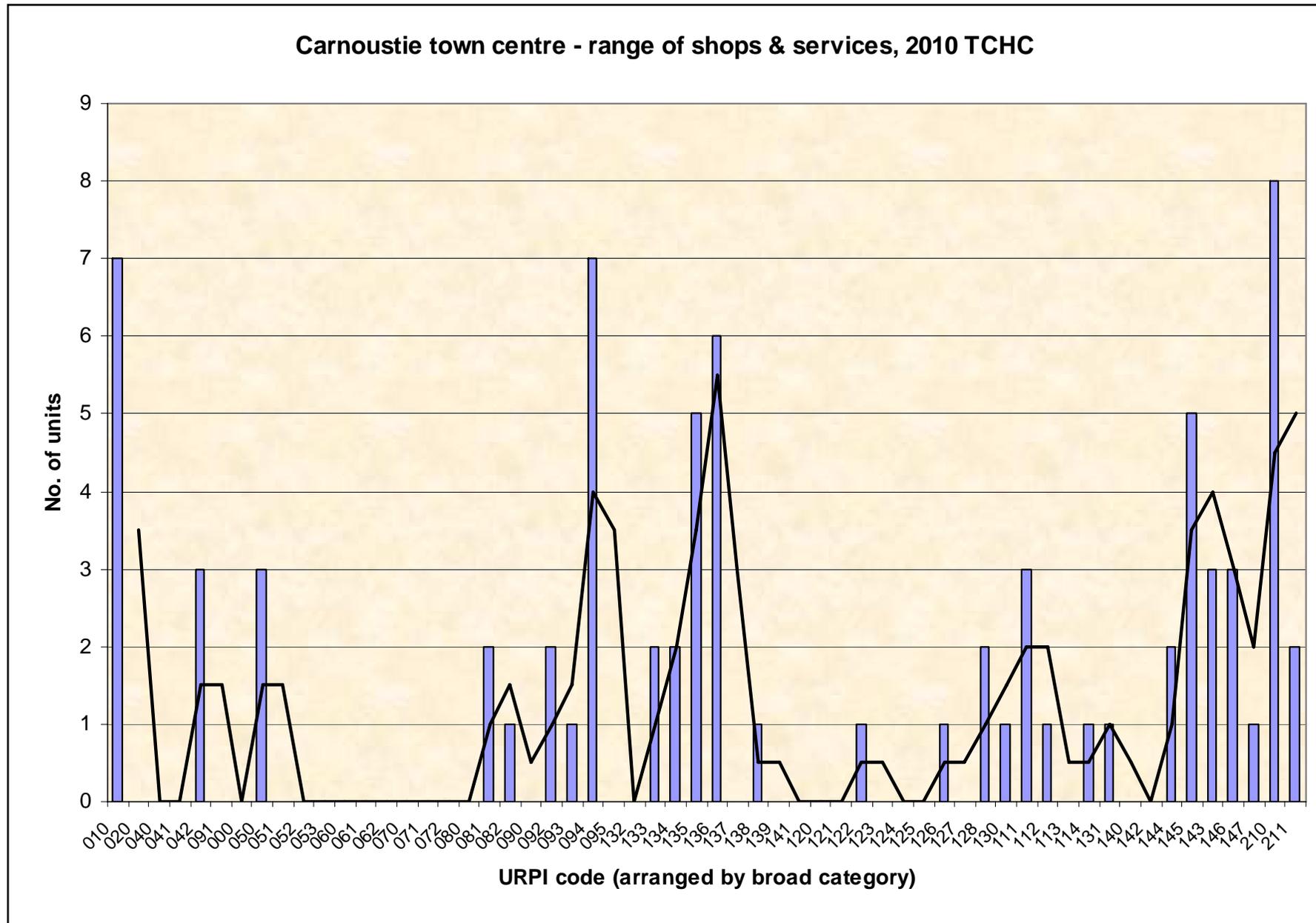


Figure 5: Range of Shops & Services within Kirriemuir Town Centre, by Retail Category (URPI) Organised by Broad Category (Convenience, Comparison, Service, Sui Generis, Vacant)

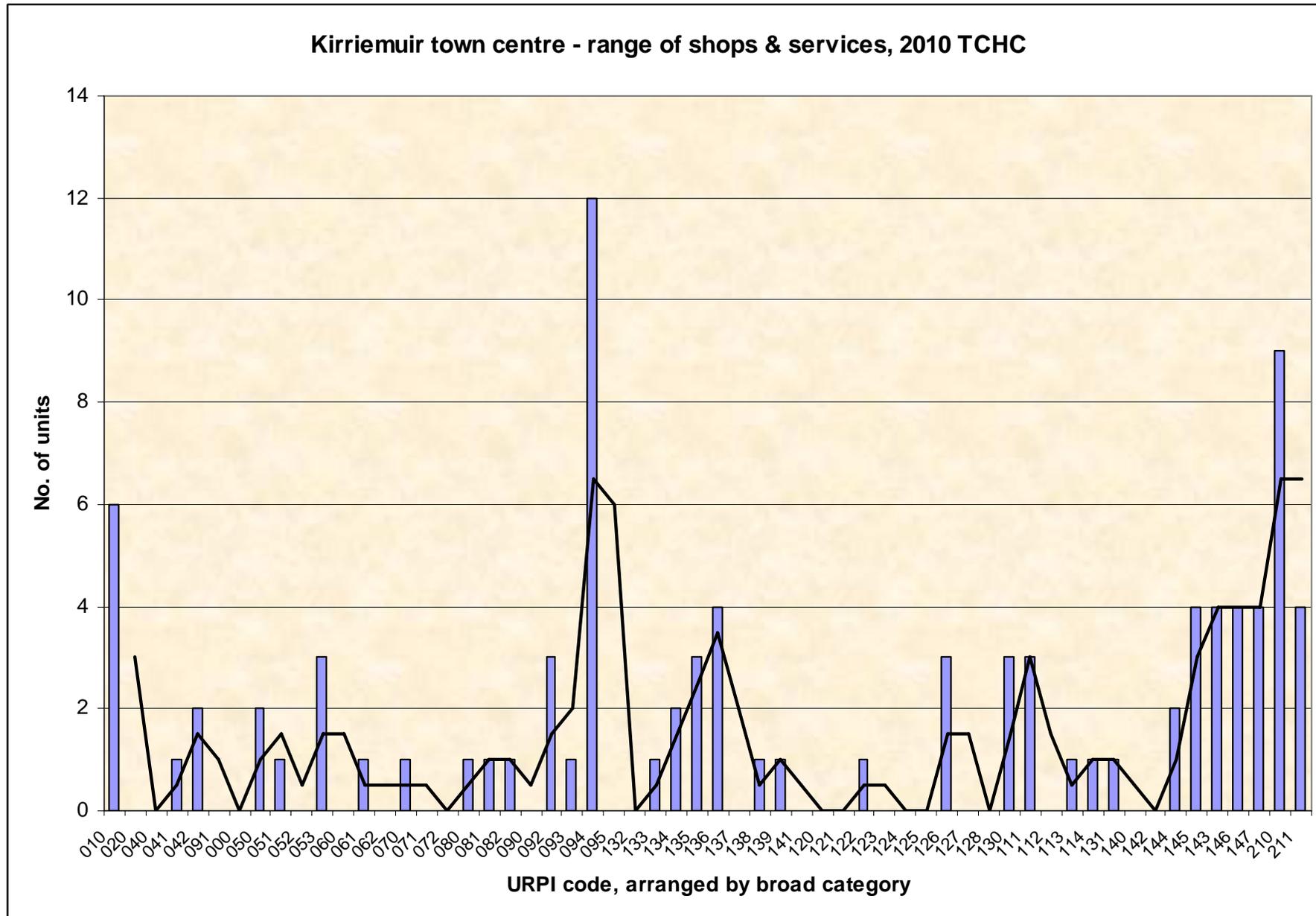


Figure 6: Range of Shops & Services within Monifieth Town Centre, by Retail Category (URPI) Organised by Broad Category (Convenience, Comparison, Service, Sui Generis, Vacant)

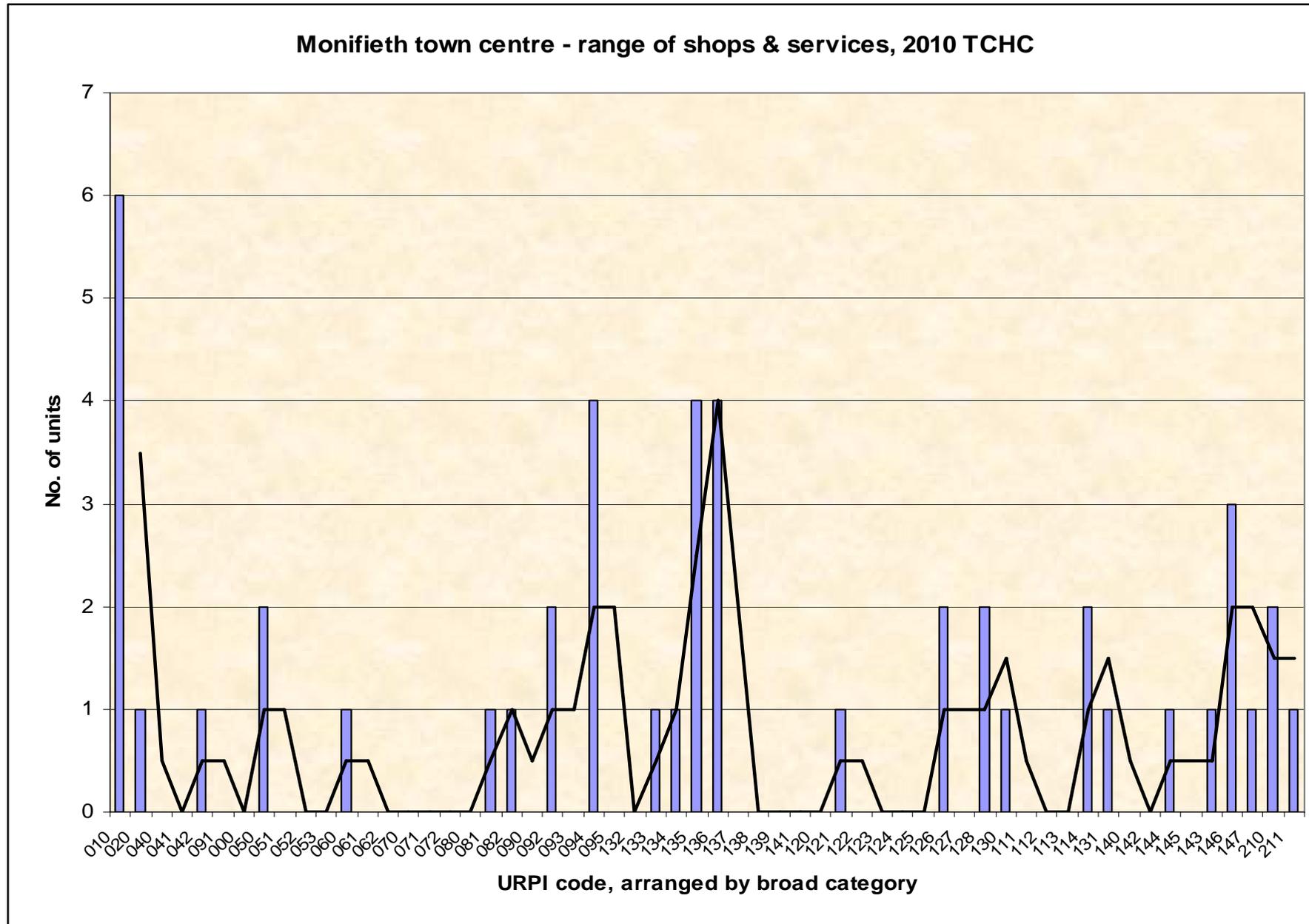
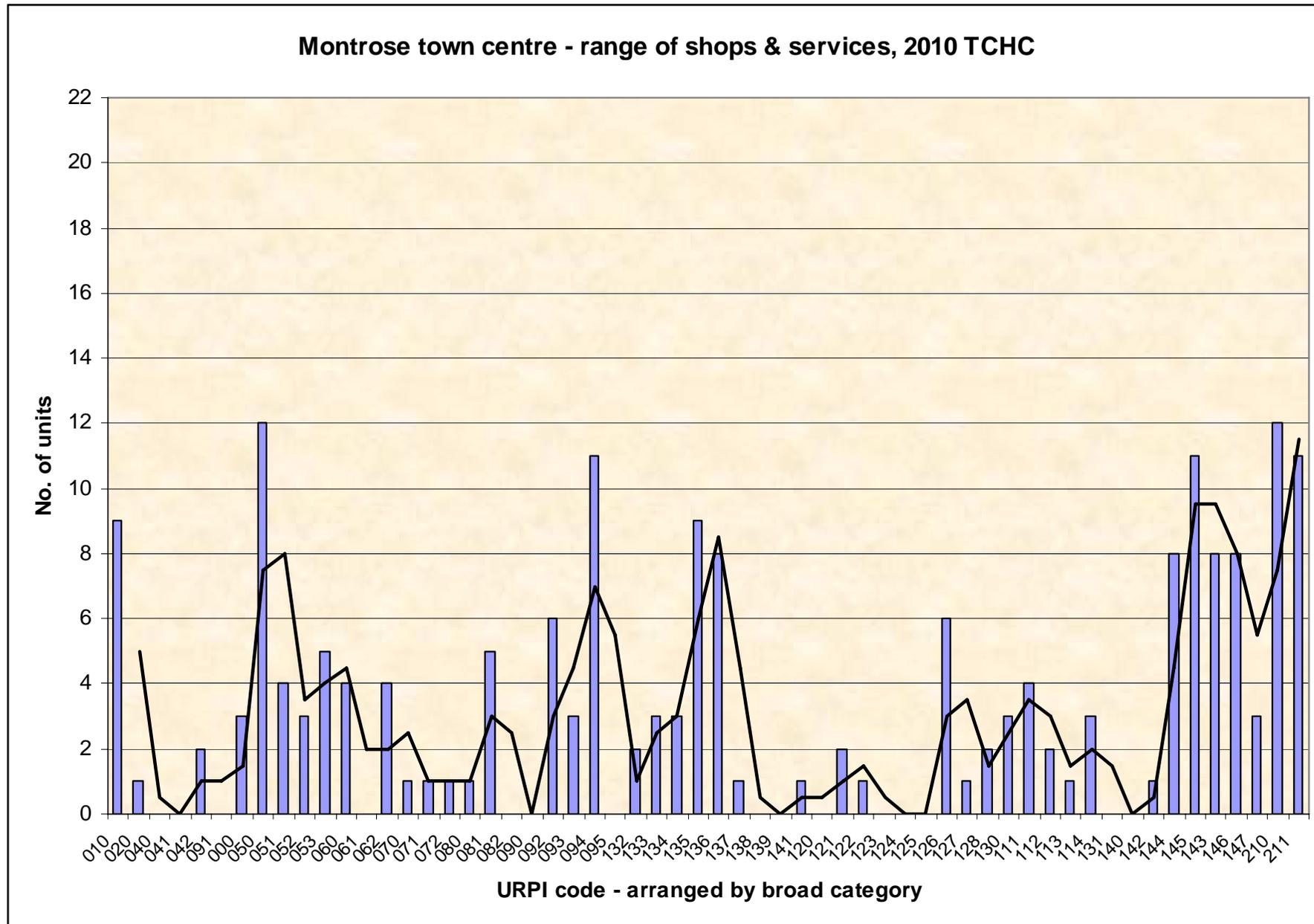


Figure 7: Range of Shops & Services within Montrose Town Centre, by Retail Category (URPI) Organised by Broad Category (Convenience, Comparison, Service, Sui Generis, Vacant)



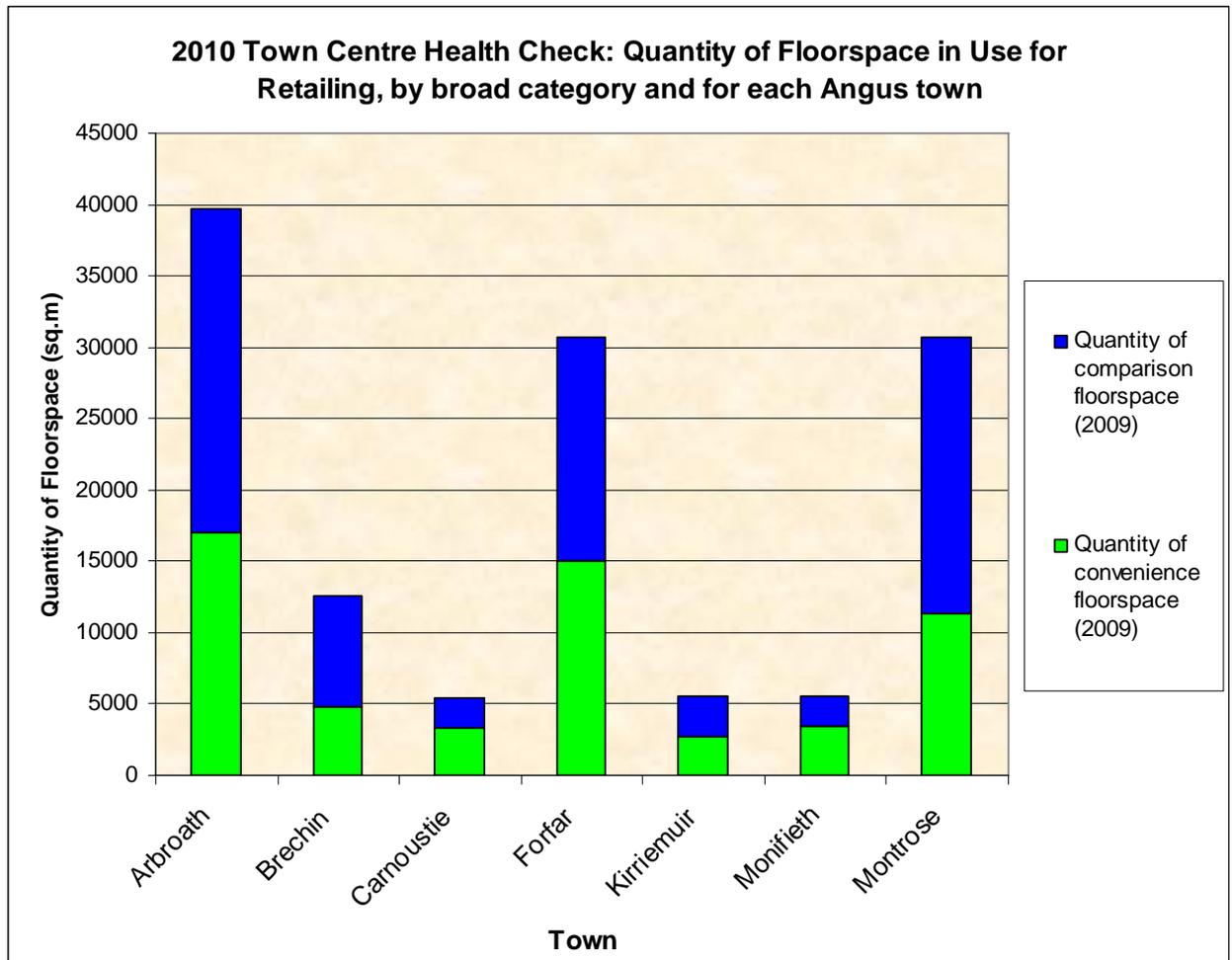
2010 ANGUS TOWN CENTRE HEALTH CHECKS

APPENDIX 4

2009 Angus Retail Floorspace Survey: Selected Results

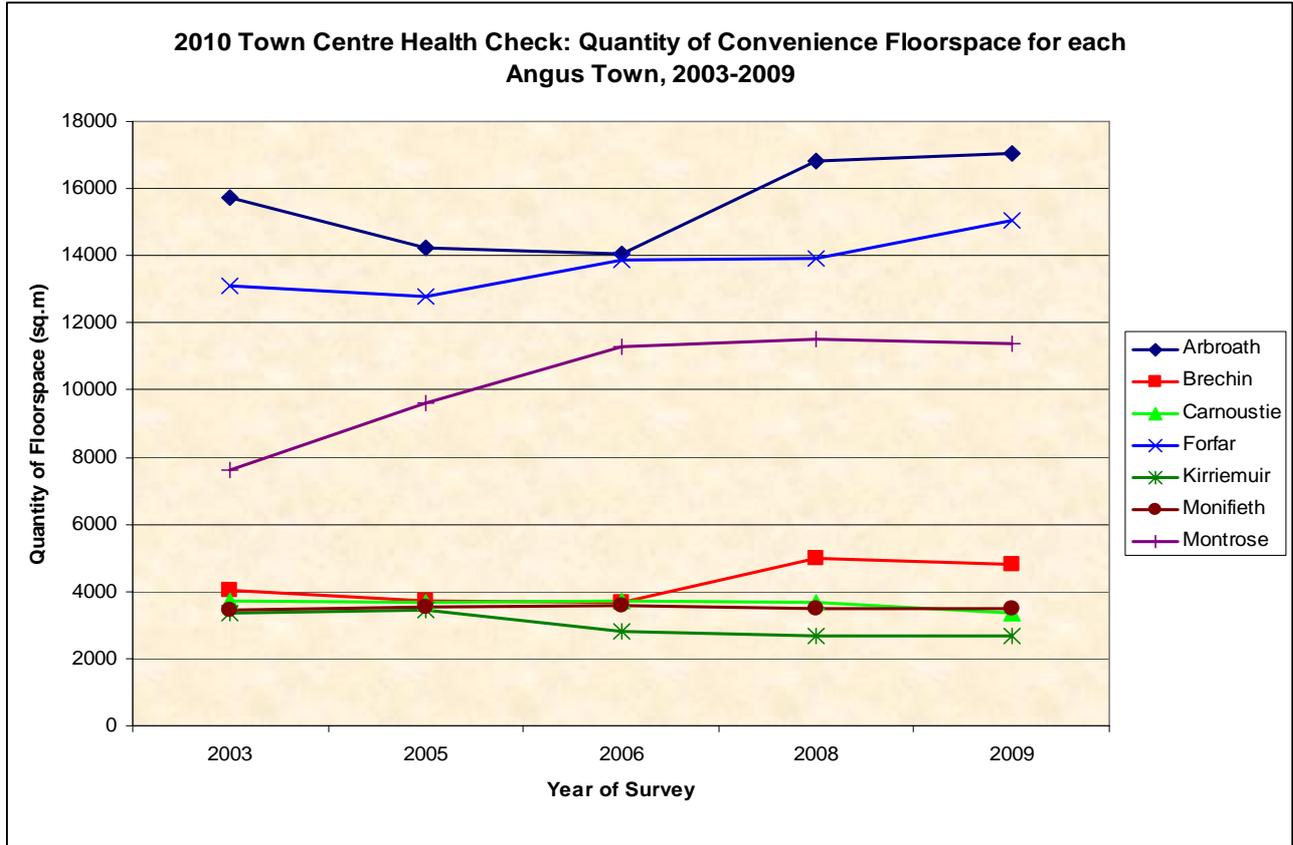
Figure 1 shows the total quantities of convenience and comparison floorspace, for each of the seven towns in 2009. The changes in the total quantity of convenience and comparison floorspace between 2003 and 2009 are shown in Figure 2.

Figure 1: Quantity of Convenience & Comparison Retail Floorspace, in each of the Seven Towns, 2009



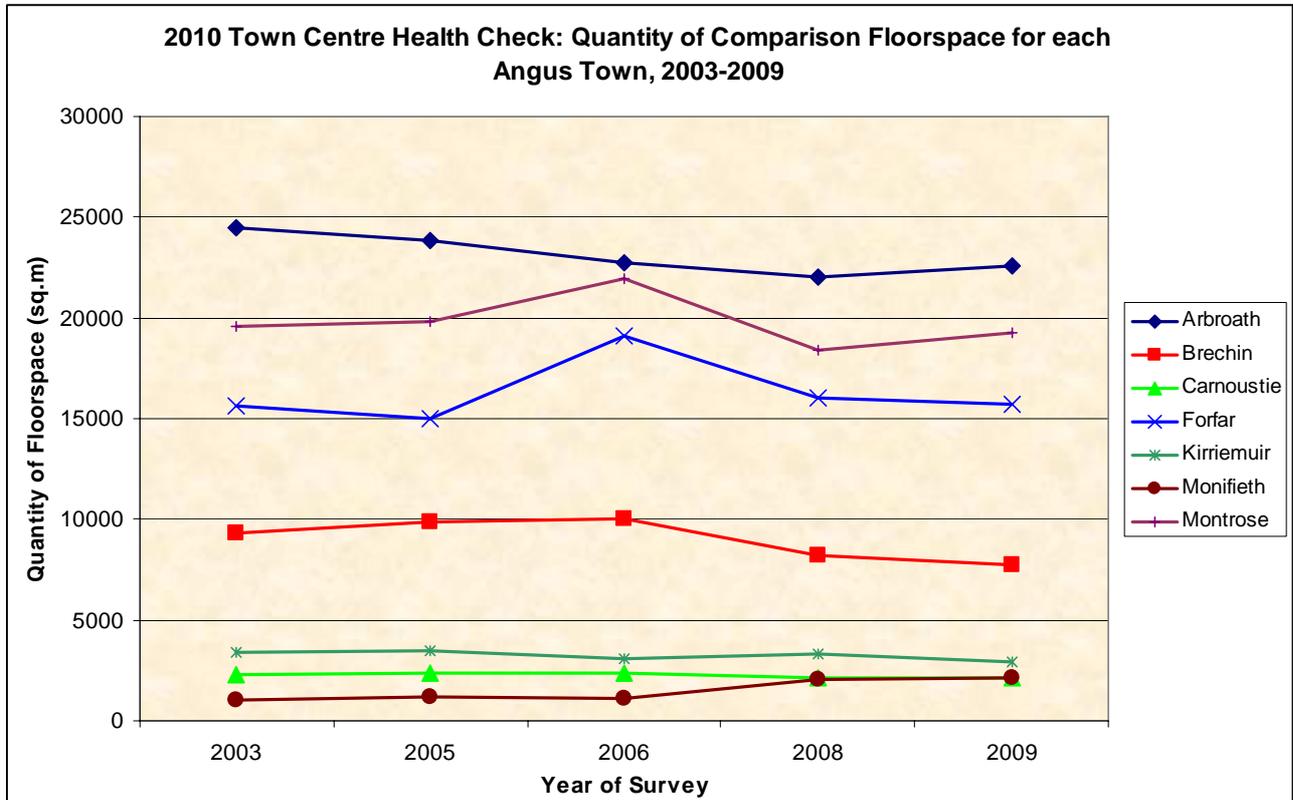
(Source: Retail Floorspace Survey, Angus Council)

Figure 2: Changes in the Quantity of Convenience Floorspace, 2003-2009



(Source: Retail Floorspace Survey, Angus Council)

Figure 3: Changes in the Quantity of Comparison Floorspace, 2003-2009



(Source: Retail Floorspace Survey, Angus Council)

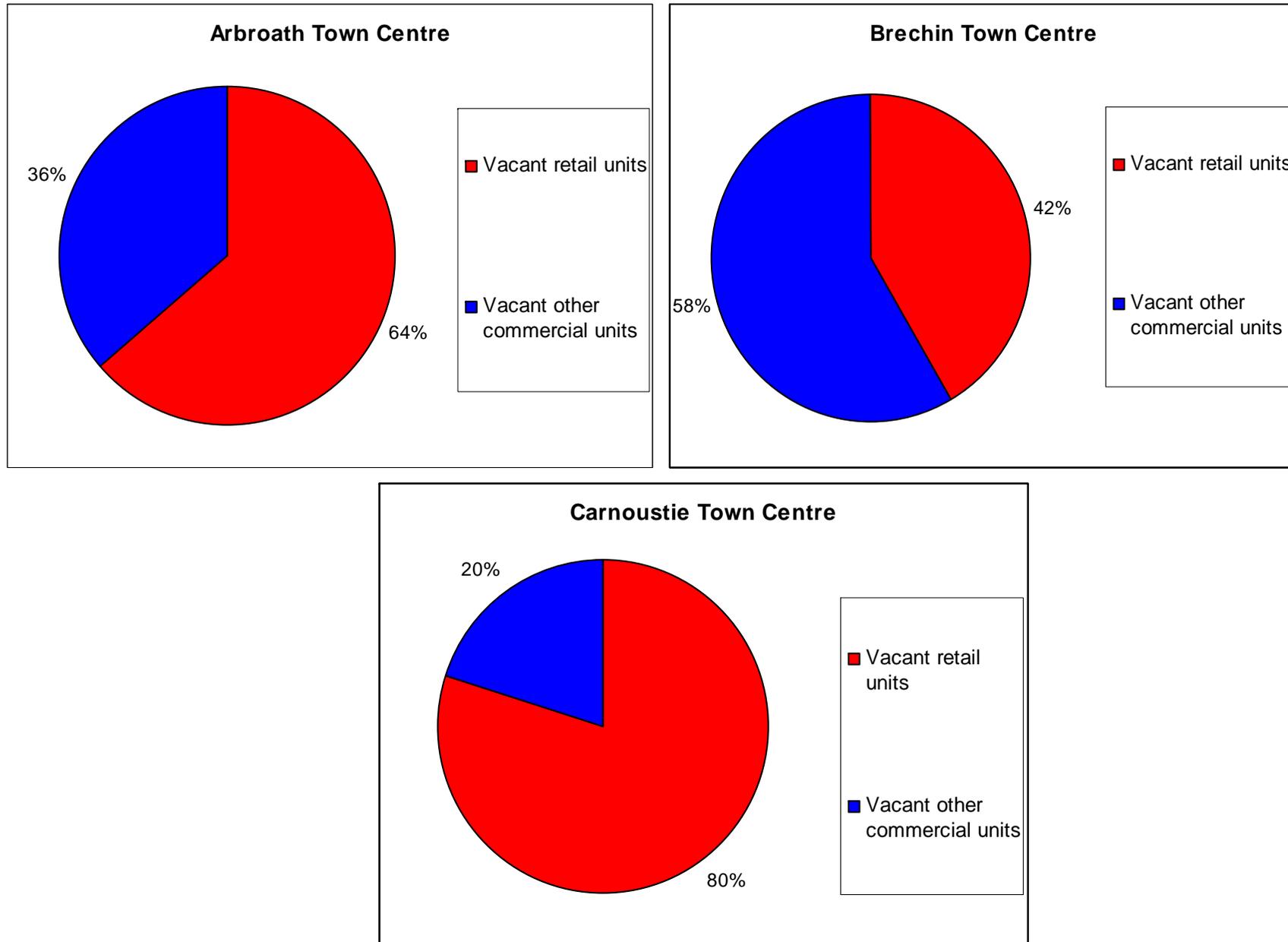
2010 ANGUS TOWN CENTRE HEALTH CHECKS

APPENDIX 5

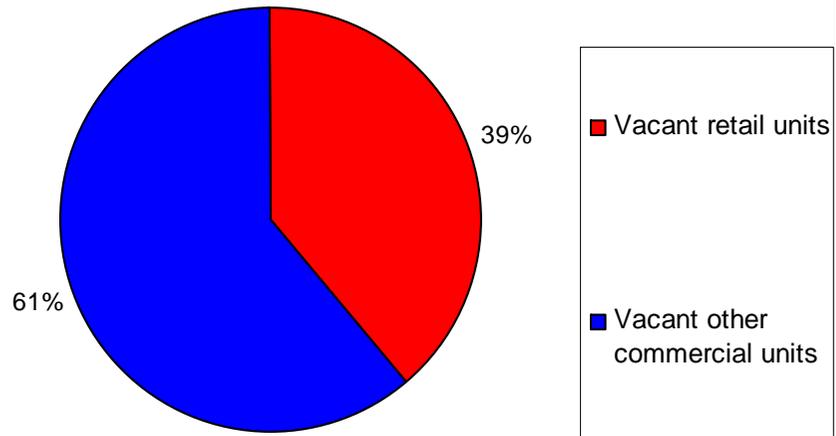
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Vacant Commercial Properties

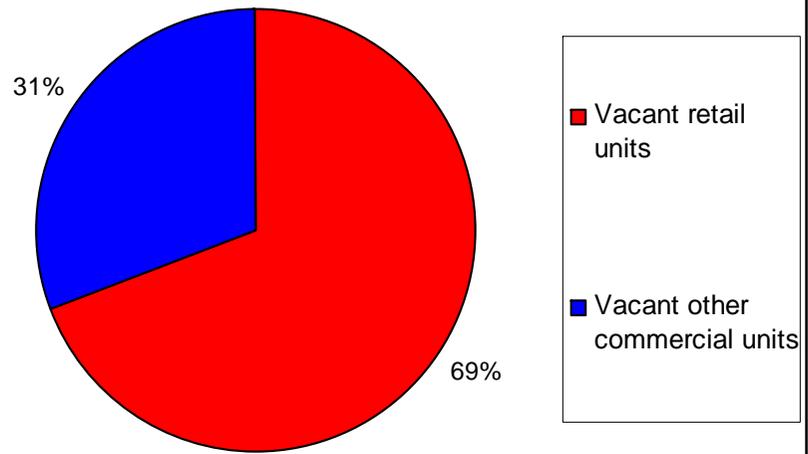
Figure 1: Pie Charts to Show the Percentage of Vacant Retail Units and the Percentage of Vacant Units previously in use for Another Commercial Purpose (e.g. as an office, restaurant or other service use), in each Town Centre.



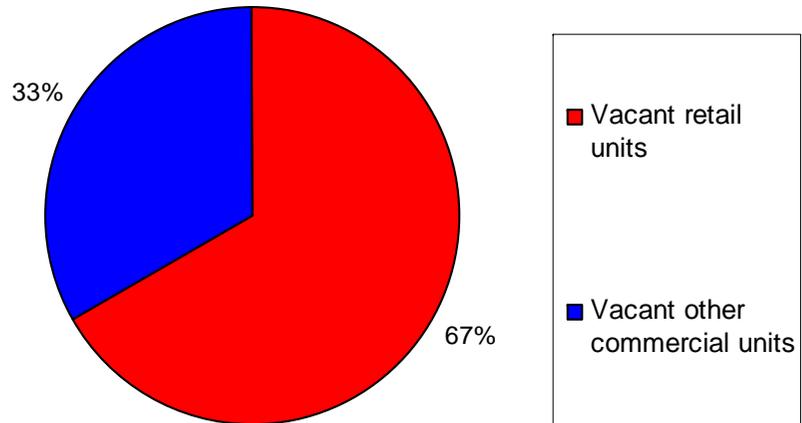
Forfar Town Centre



Kirriemuir Town Centre



Monifieth Town Centre



Montrose Town Centre

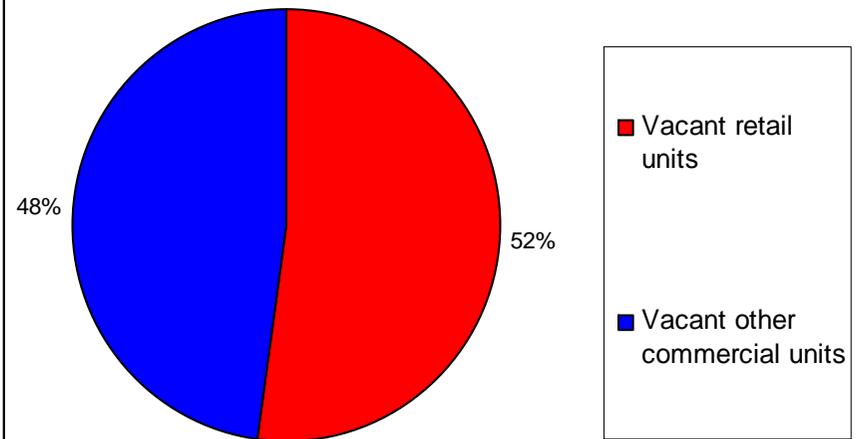
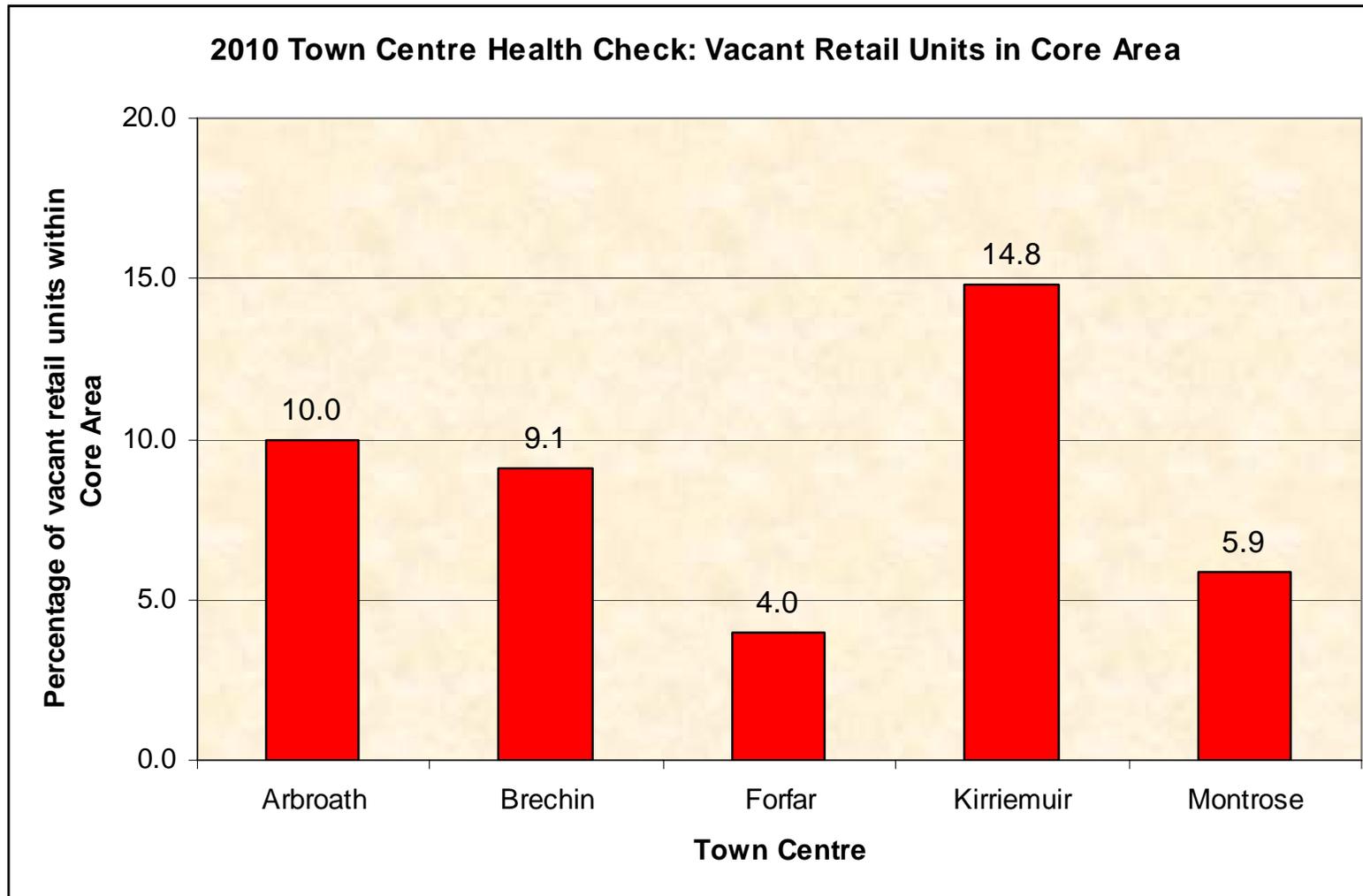


Figure 2: Percentage of Vacant Retail Units within Core Areas of the Angus Town Centres



Please note: Carnoustie & Monifieth Town Centres do not have a defined core area

Table 1: A Complete List of Shops designated as Specialist Independent Retailers within the 2010 Health Checks, for each Town Centre

Town Centre	Specialist Independent Retailers (SIRs)	Goods/services sold or provided	Why is this retailer an SIR?
Arbroath	Turnkey Gallery	prints, paintings	sale of luxury items; only one other outlet in town centre
	Angus Country Sports	fishing tackle & countryside pursuits equipment	sale of specialist items; no other outlets in town centre
	Arbroath Stitch Master	tailors, repairs and clothing alterations	a reason for visiting the centre; no other outlets in town centre
	Christies Fine Art	pet portraits, paintings, prints, picture framing	sale of luxury items; only one other outlet in town centre
	Abbey Music	musical instruments and sheet music	sale of specialist items; no other outlets in town centre
	Pert	bedroom, kitchen and dining room furniture	sale of high value items; no comparable alternative in town centre
Brechin	J. Mitchell & Sons	fine jewellery	sale of luxury items; only one other outlet in town centre
	Boutique by Kavak	ladieswear and accessories (hand bags)	sale of high value items; no comparable alternative in town centre
	Little Poland	Polish food	sale of specialist items; no other outlets in town centre
	Ted Drahony	picture framing service, prints & paintings	sale of luxury items; no comparable outlet in town centre
	City Computers	computers, computer repairs, computer accessories	sale of specialist items; no other outlets in town centre
	Adagio Music	musical instruments	sale of specialist items; no other outlets in town centre
	Gardiner's	toys, prams, baby clothes	a reason for visiting the centre; no other outlets in town centre
	Place Rite	Interior design & furnishings	sale of high value items; no comparable alternative in town centre
	Bruce Brymer Butchers	meat inc. award winning sausages	a reason for visiting the centre
	Gourmet Grocery	specialist foods and drink, inc. duck & quails eggs, chutney	sale of luxury items
	George A. Moir	Jeweller, watchmaker	sale of high value items; only one other outlet in town centre
	Blacks of Brechin	furniture, carpets and vinyls	a reason for visiting; no other outlets in town centre

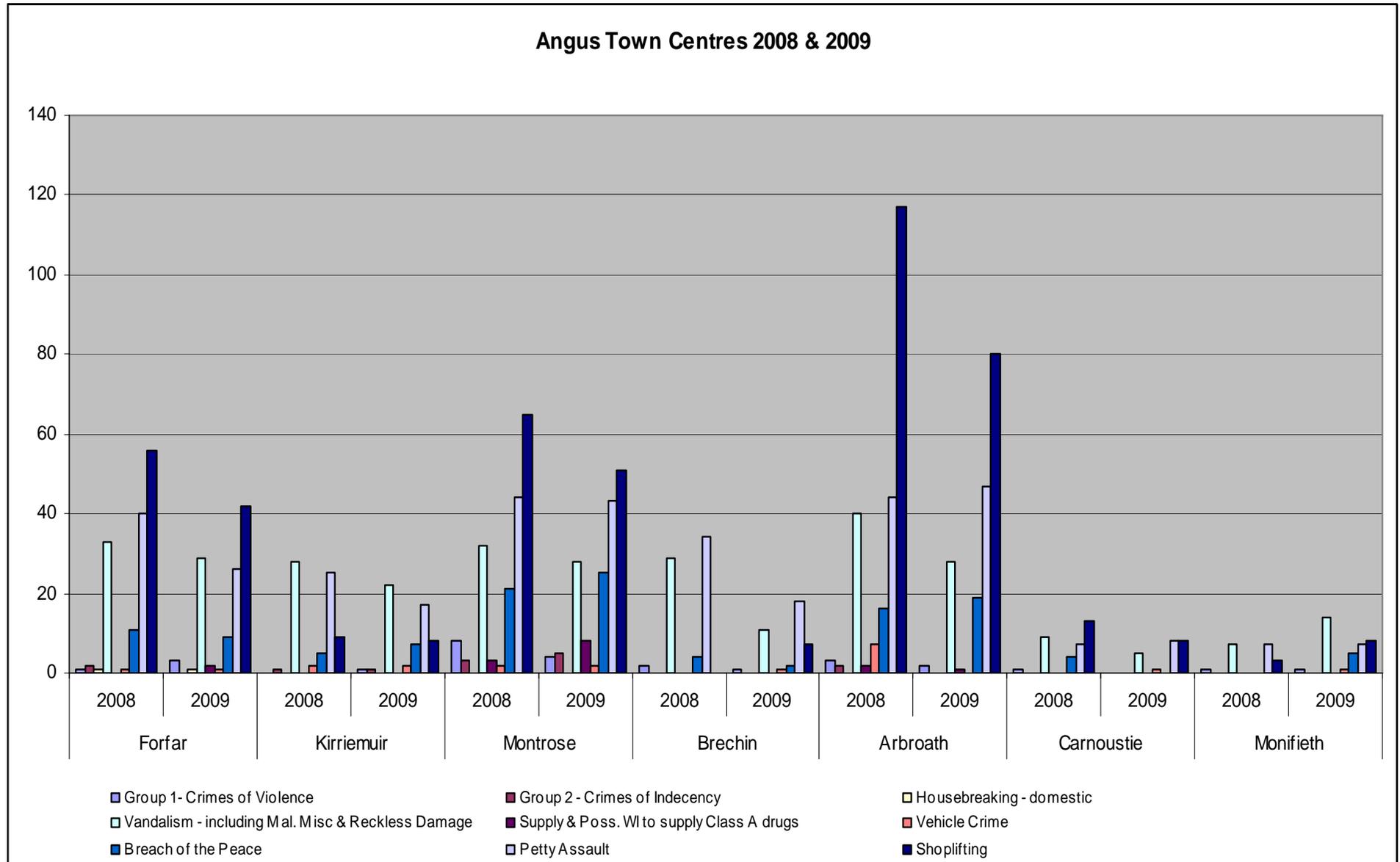
Carnoustie	The Carnoustie Golf Shop	golf equipment and paraphenalia	sale of specialist items; no other outlets in town centre
	Harbour Gallery Picture Framing	paintings, prints, picture framing	sale of luxury items; no comparable outlet in town centre
	Coastal Spirit	jewellery and gifts	sale of high value items; no comparable alternative in town centre
	Angus Trophy Centre	trophies, engraving and personalised gifts	sale of specialist items; no other outlets in town centre
	The Dressing Up Box	fancy dress clothing	sale or hire of specialist items; no other outlets in town centre
Forfar	Colin M. Smith	electrical appliances for the home	sale of high value and luxury items; no comparable outlet in town centre
	Rennie Butchers	meat	sale of high quality items; a reason for visiting the centre
	Tannadice Trophies	engraving & trophies	sale of specialist items; no other outlets in town centre
	Angus Angling	angling paraphenalia (tackle, lines, clothing)	sale of specialist items; no other outlets in town centre
	Canvas Art	art work and unusual gifts	sale of luxury items; no comparable outlet in town centre
	David Irons & Sons	hardware, fencing, ironmongers	sale of specialist items; a reason for visiting the centre
	West Neuk Gallery	handmade jewellery, designer clothes/bags	sale of luxury items; few comparable outlets in town
	Jarvis Brothers	carpets, textiles, clothes, lingerie	sale of high value items; no comparable alternative in town centre
	D & A Kennedy Butchers	meat	sale of high quality items; a reason for visiting the centre
Kirriemuir	Colin M. Smith	electrical appliances for the home	sale of high value and luxury items; no comparable outlet in town centre
	Star Rock Shop	sweets and confectionary	a reason for visiting the centre
	Roods Gallery	prints, paintings	sale of luxury items; seemingly part of a theme within the town centre (arts shops), giving a reason for visiting the centre
	Bumbles	womens clothing and accessories	sale of high value and luxury items
	Hamilton Kerr Gallery	prints, paintings	sale of luxury items; seemingly part of a theme within the town centre (arts shops), giving a reason for visiting the centre

	Angus Fine Art & Tearooms	prints, paintings & tearoom	sale of luxury items; seemingly part of a theme within the town centre (arts shops), giving a reason for visiting the centre
	Flora & Hortus	flowers for weddings (including unusual flowers)	sale of luxury items; a reason for visiting the centre
	Bruce Walker Crystal Engraver & Stone Sculpter	glass engraving, stone carving and monumental masonry	sale of luxury items; no comparable outlet in town centre
	Random Recycle	recycling of unwanted household goods and associated community services (notice board for swapping items, art gallery for local artists)	unique service; a reason for visiting the centre
	Bertram's Quality Butchers	meat	sale of high quality items; a reason for visiting the centre
	Bank St Gallery	prints, paintings	sale of luxury items; seemingly part of a theme within the town centre (arts shops), giving a reason for visiting the centre
	Currie & Co. Accountants	prints, paintings	sale of luxury items; seemingly part of a theme within the town centre (arts shops), giving a reason for visiting the centre
	Fingerprint	embroidery, screen printing of T shirts, leisurewear & school uniforms	a reason for visiting the centre; no other outlets in town centre
Monifieth	MGR cycles	bicycles and bike parts	a reason for visiting the centre; no other outlets in town centre
Montrose	Buth Tabhartas	Jewellery, gifts and glassware	sale of high value and luxury items
	Photek	Photo framing (football clubs & supporters paraphenalia a speciality)	sale of specialist items; no other outlets in town centre
	Brides Unlimited	Bridal wear	sale of specialist items; a reason for visiting the centre
	Highland Scene	Kiltwear & Scottish gifts	sale of specialist items; no comparable outlets in town centre

2010 ANGUS TOWN CENTRE HEALTH CHECKS

APPENDIX 6

Figure 1: Number of Town Centre Crimes Recorded in the Angus Town Centres, January 2008-December 2009 inclusive

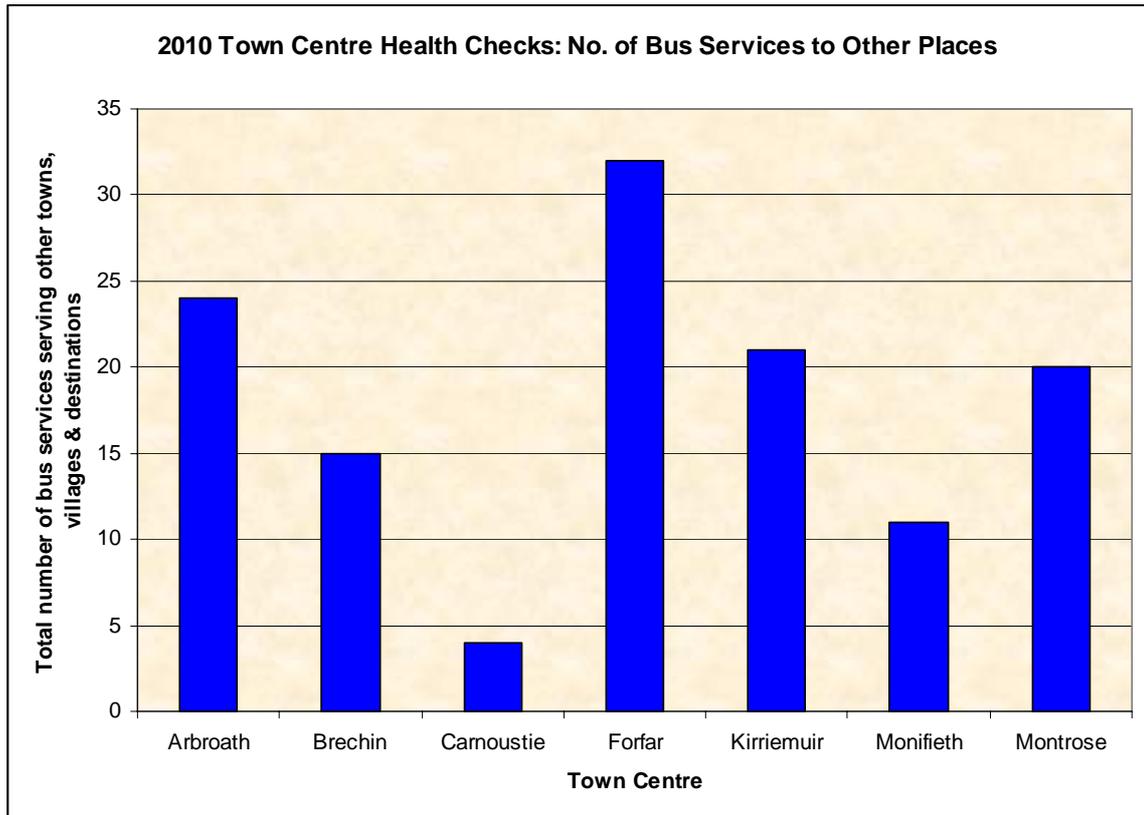


Source: Tayside Police, 2010

2010 ANGUS TOWN CENTRE HEALTH CHECKS

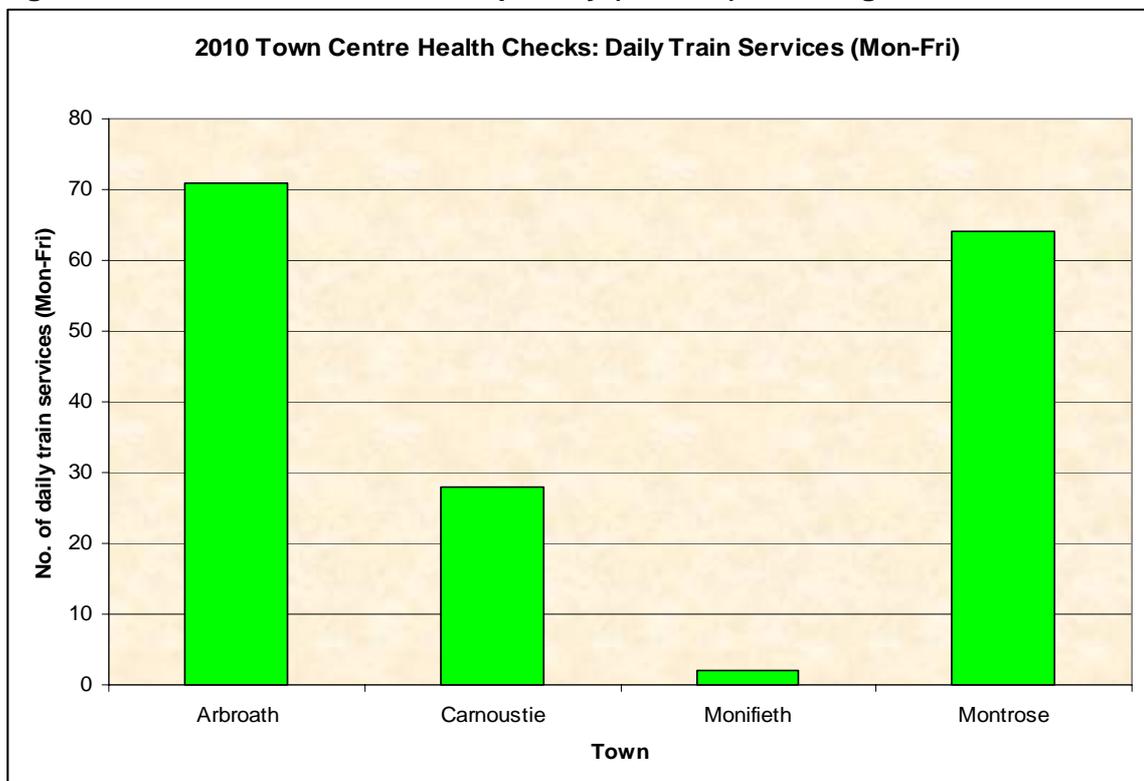
APPENDIX 7

Figure 1: Total Number of Bus Services between each Town Centre and Other Places



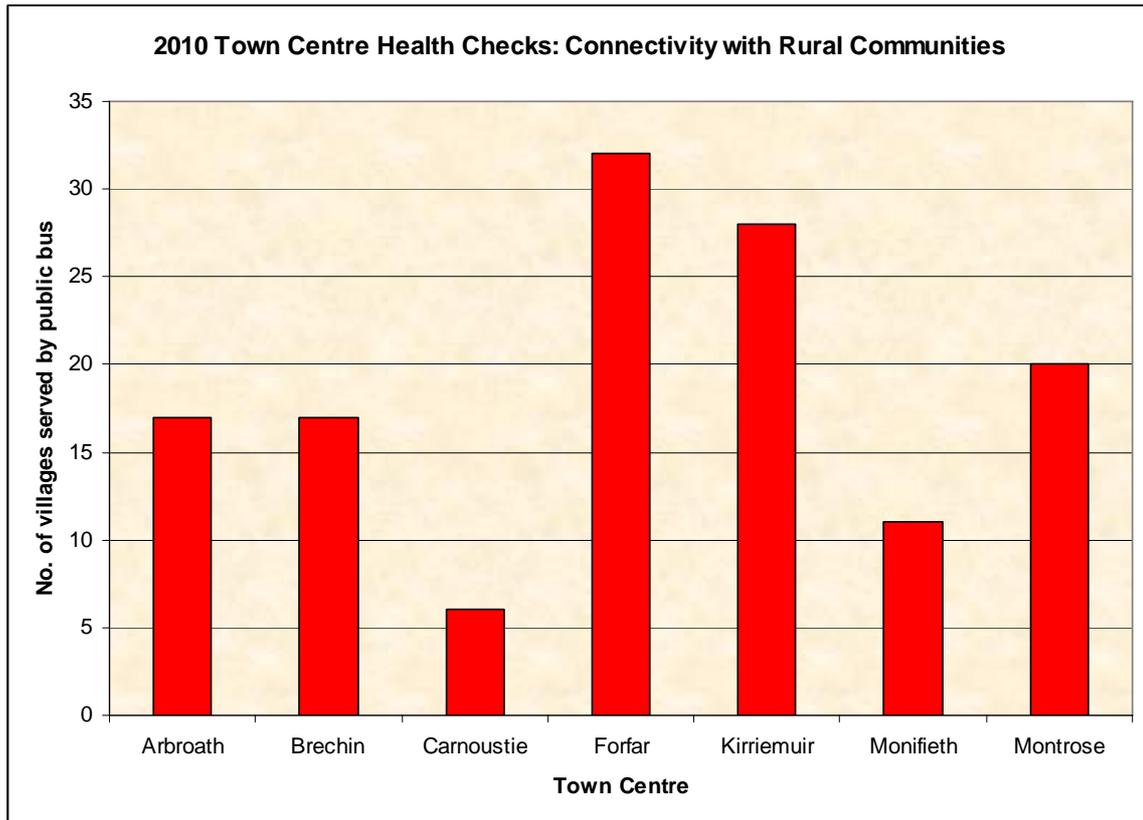
Source: Angus Council Timetable Index (August 2010)

Figure 2: Number of Train Services per day (Mon-Fri) from Angus Towns



Source: Scotrail timetables (at October 2010)

Figure 3: Number of Villages Served by Public Bus, from each Town Centre



Source: Angus Council Timetable Index (August 2010)

Please Note: villages are defined as the rural communities with a defined development boundary in the Angus Local Plan Review (adopted 2009).