2021

SCOTTISH BORDERS COUNCIL
FOOTFALL REPORT

Scottish Borders Council

Footfall Report 2021

Finalised March 2023

Contents

Key findings

1. Introduction & policy context

1.1 Scottish Borders Council has monitored town centre footfall annually since 2007. This report sets out the results of the autumn 2021 survey, and looks at results since 2007 to identify trends. Footfall is recorded in nine Borders' town centres: Duns, Eyemouth (since 2012), Galashiels, Hawick, Jedburgh, Kelso, Melrose, Peebles and Selkirk.

1.2 Between 2007 and 2014 footfall was generally declining in the Scottish Borders surveyed towns. The period following 2007 broadly coincided with the extended global economic downturn. Vacancy rates increased across the UK during this period, provoking much debate around the future of our town centres. In 2015 however, footfall increased by 13%; between 2015 – 2018 footfall across all nine towns was relatively stable. Online retail was increasing year on year, peaking at 37.8% of total retail sales in the UK, in January 2021; a previous high of 32.8% came in May 2020, 2 months into the first lockdown period. When the footfall surveys were conducted in September-October 2021, online retail in the UK had dropped to 28.2% [Office of National Statistics, May 2022]. The 2021 footfall survey shows an overall increase in footfall in the Border towns from 2020, in correlation with the UK decrease in online retail sales.

Legacy of COVID-19 on 2021 footfall study

1.3 Retail footfall counts in High Streets in the UK, from January 2019 to April 2020, showed a decrease of 81.8%; in September 2021 footfall had risen again but was still below the January 2019 count [Statista 2022]. All restrictions had been lifted in the autumn of 2021, except the wearing of facemasks in shops and other buildings. In conjunction with the vaccine programme being well underway, the public's behavioural patterns changed; although, High Street footfall is still lower than 2019. In the Scottish Borders there has also been a small rise in footfall in town centres as restrictions were gradually lifted.

1.4 The pandemic restrictions encouraged, according to one online survey, British shoppers to shop locally, with nearly two-thirds spending in local and independent shops. The survey also discovered that they intend to continue to support their high streets. [YouGov for Barclay Card 2021]

Policy context

1.5 The Scottish Government responded to the challenges in town centres by initiating the Town Centre Review. The Review put forward a range of policy and capital injection proposals, many of which were ultimately adopted by the Scottish Government. Amongst these was a 'town centre first' principle whereby public bodies consider how they can support town centres before considering development elsewhere. The Scottish Government's Place Based Investment Programme will be making £325 million, over 5 years, available in Scotland. The scheme will be delivered in partnership with COSLA, *"to help create places across Scotland where we are able to live well locally and have vibrant town centres with the facilities, services, opportunities and connections we need to flourish"* [Town Centre Action Plan - review report: interim joint response, March 2021].

1.6 The Town Centre Review was updated in 2021, when the review group published their report 'A New Future for Scotland's Town Centres'. This report followed the resurgence of the value of local centres during and following the COVID-19 pandemic. The first recommendation was to ensure the formal positioning of towns and town centres is strengthened in National Planning Framework 4.

1.7 National Planning Policy is set out in the Scottish Planning Policy, which gives a policy stance to that advocated above. *"The town centre first principle, stemming from the town centre action plan, promotes an approach to wider decision-making that considers the health and vibrancy of town centres."* [Scottish Planning Policy 2014, revised 2020].

1.8 National Planning Framework 4 (NPF4), the national planning framework for Scotland, was adopted and published by Scottish Ministers on 13 February 2023. The commencement of the provisions of the Planning (Scotland) Act 2019, especially section 13, amended the composition of the Development Plan, making NPF4 part of the statutory Development Plan. Therefore, NPF3 and Scottish Planning policy have been superseded by NPF4. Policy 27 maintains the policy stance of the Town Centre First approach, with desired outcomes focusing on vibrant and healthy places for people to live, learn, work, enjoy and visit.

1.9 Local town centre and retail policies are now set out through the Council's Local Development Plan [LDP]. The LDP includes policies that direct development towards town centres and offer support to development that would benefit town centre vitality and viability. The Core Activity Areas policy replaced the previous Prime Retail Frontage policy and supports a preference of class 1 and class 3 uses within the central part of town centres with the aim of encouraging footfall.

1.10 The Council’s town centre monitoring processes include annual footfall surveys, and biannual Town Centre Health Checks and Retail Surveys, which measure town centre vacancy rates. The primary purpose of this research is to provide an evidential basis for the Council’s town centre and retail policy decisions; the data is also used increasingly for broader town centre performance monitoring purposes in the region.

1.11 The Council has exercised policy levers that are available, including regeneration schemes in Selkirk, Kelso, Jedburgh and Hawick. The Conservation Area Regeneration Schemes (CARS) are finished in Selkirk and Kelso but are currently active in Hawick and Jedburgh (due for completion in 2025 and 2022 respectively). The Borderlands Inclusive Growth Deal, signed in March 2021, has unlocked investment for the Borderlands Partnership; a cross-border deal involving Scottish Borders, Dumfries & Galloway, Northumberland, Carlisle and Cumbria. The Place Programme project will support the development and renewal of towns across the Borderlands region.

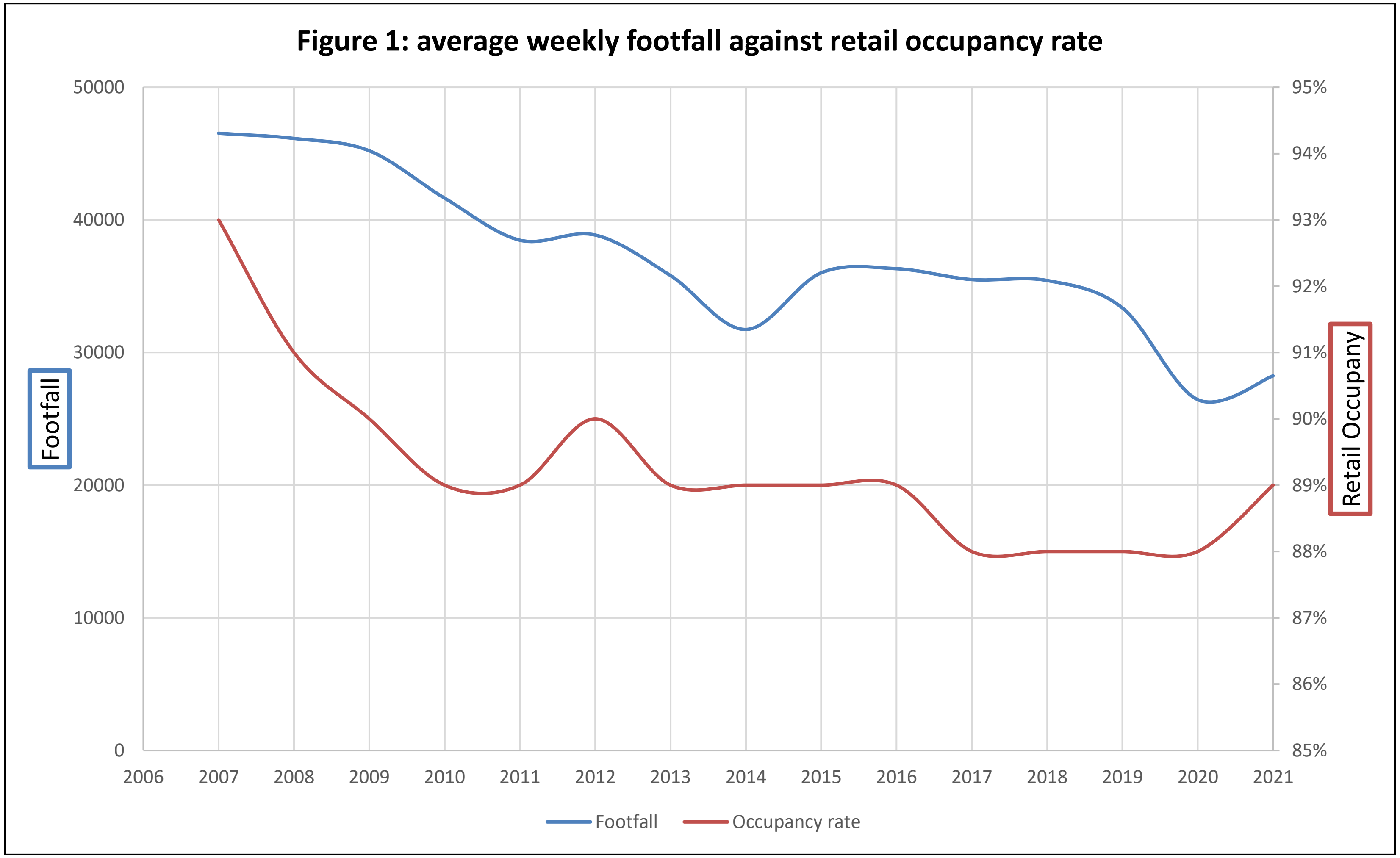
2. Footfall trends 2007 – 2020

2.1 Town centre footfall has been recorded annually for fifteen years in the Scottish Borders. Footfall was generally declining in the first eight years of monitoring, then increasing in 2015 and 2016. However, from 2017 to 2020 footfall has decreased, with the most significant decrease being in 2020. Table 1 sets out the average weekly footfall per settlement; coronavirus restrictions meant that there was not a complete retail survey in 2020. Figure 1 shows these results against the retail unit occupancy rate (the inverse of the vacancy rate, note last full retail survey was 2019) over the same period. The data shows a clear decline in footfall, reflecting coronavirus restrictions, and the increase in online shopping.

Table 1: average weekly footfall per settlement 2007-2021

Settlement	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Peebles	9840	8980	9500	8590	8120	7940	7140	7610	7930	8100	8020	7580	7400	6550	6860
Galashiels	9650	9470	8780	8220	8190	8380	8220	7930	8180	8080	7970	7910	7080	4740	4760
Kelso	5050	5170	5210	4790	4170	4360	4130	4980	5550	5340	5050	4690	4430	4010	4360
Hawick	9680	9990	9740	9130	8190	7480	6200	3750	4360	4730	4680	5090	4590	3920	4080
Melrose	3540	3340	3420	3200	2930	3430	3390	990	3550	3370	3050	3140	3280	2500	2970
Jedburgh	2920	3400	3260	2960	2710	2900	2700	2610	2460	2310	2450	2180	2080	1890	1740
Selkirk	3690	3590	3250	2930	2580	2660	2420	2090	2350	*2710*	*2670*	3300	3050	1870	2410
Duns	2160	2200	2050	1820	1580	1710	1600	1780	1630	1680	1610	1540	1450	970	1060
TOTAL (exc. Eyemouth)	46530	46140	45210	41640	38470	38860	35800	31740	36010	36320	35500	35430	33360	26450	28240
Eyemouth	-	-	-	-	-	2220	1880	2150	2270	2120	2010	1930	1690	1290	1900
TOTAL (inc Eyemouth	-	-	-	-	-	41080	37680	33890	38280	38440	37510	37360	35050	27740	30140

Figure 1: Average weekly footfall against retail occupancy rate



2.2 Table 2 (below) shows year-on-year percentage changes, rises are shown in pink, no change in beige and falls are shown in white. The table shows that overall there has been an increase of 9% recorded across the surveyed towns over the last year. This compares to a -22% change recorded in the same towns in 2019-20. The table highlights an increase in footfall numbers in most towns. This is the third instance since records began in 2012, when Eyemouth was included, that shows an increase from the following year. Figure 2 (below) shows the average weekly footfall per settlement from 2007 to 2021 in graph form.

Table 2: Annual percentage year-on-year change in average weekly footfall per settlement, 2007-19

Settlement	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21
Duns	2	-7	-11	-13	8	-6	11	-8	3	-4	-4	-6	-33	3
Galashiels	-2	-7	-6	0	2	-2	-4	3	-1	-1	-1	-10	-33	0
Hawick	3	-3	-6	-10	-9	-17	-40	16	8	-1	9	-10	-15	4
Jedburgh	16	-4	-9	-8	7	-7	-3	-6	-6	6	-11	-5	-9	-8
Kelso	2	1	-8	-13	5	-5	21	11	-4	-5	-7	-6	-9	3
Melrose	-6	2	-6	-8	17	-1	-71	259	-5	-9	3	4	-24	19
Peebles	-9	6	-10	-5	-2	-10	7	4	2	-1	-5	-2	-11	5
Selkirk	-3	-9	-10	-12	3	-9	-14	12	15	-1	24	-8	-39	23
Total (exc. Eyemouth)	-1	-2	-8	-8	1	-8	-11	13	1	-2	0	-6	-21	7
Eyemouth						-15	14	6	-7	-5	-4	-12	-24	47
Total (inc. Eyemouth)						-8	-10	13	0	-2	0	-6	-21	9

UK footfall decline

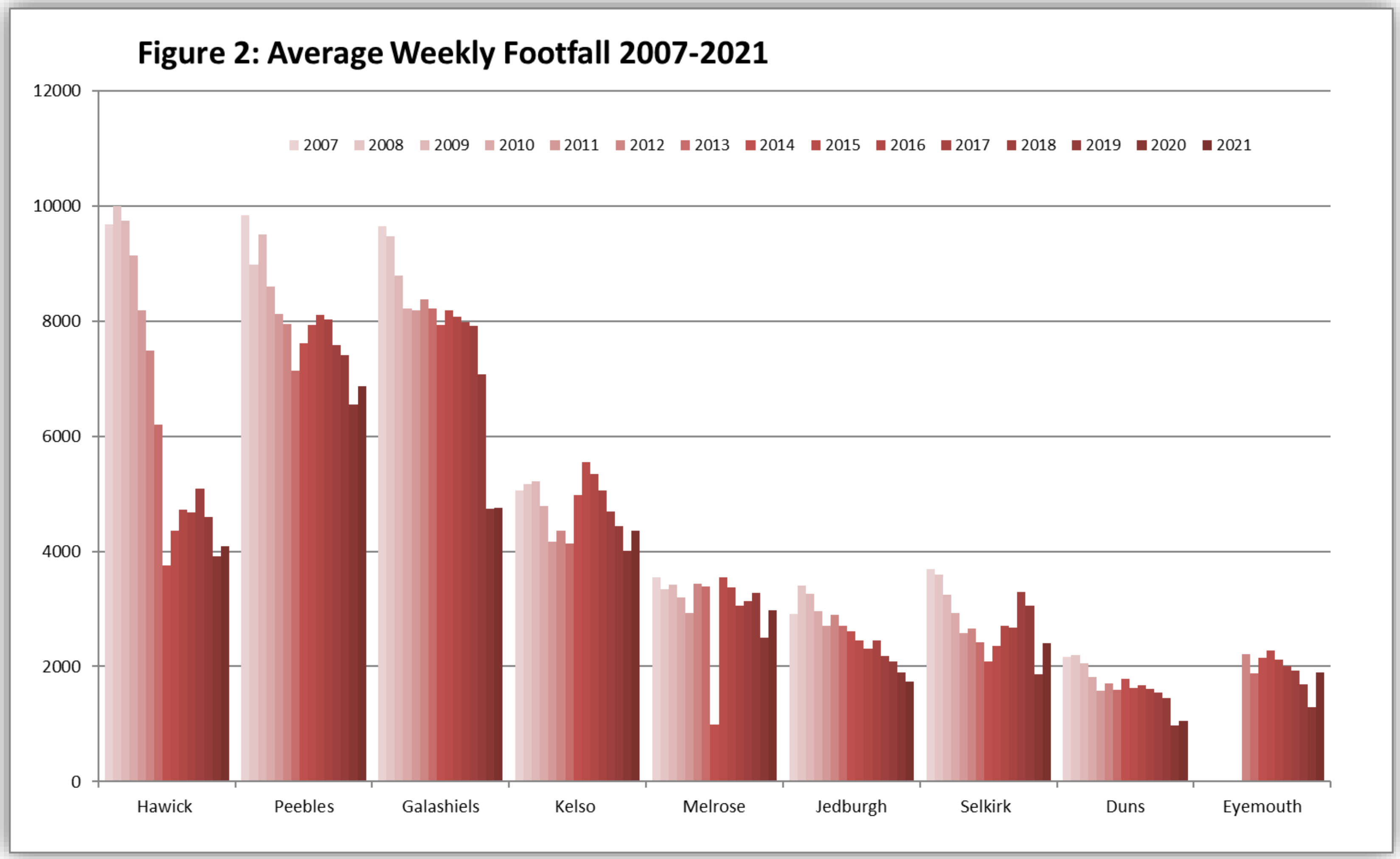
2.3 The collation of year on year footfall data allows the performance of the Scottish Borders town centres as compared against national footfall trends. The table below highlights changes in overall footfall levels in the UK to those of the Scottish Borders. The data highlights the variable nature of Borders' footfall results in recent years. The results also show the Scottish Borders has been performing well in the previous years and follows the general trend of declining footfall nationally.

Table 3: Total weekly footfall – year on year percentage change

Area	2015 to '16	2016 to '17	2017 to '18	2018 to '19	2019 to '20	2020 to '21
UK	-1%	-2%	-1%	-2%	-45%	12%
Scottish Borders	1%	-2%	0%	-7%	-21%	9%

*Source: Springboard

Figure 2: Average weekly footfall 2007-2021

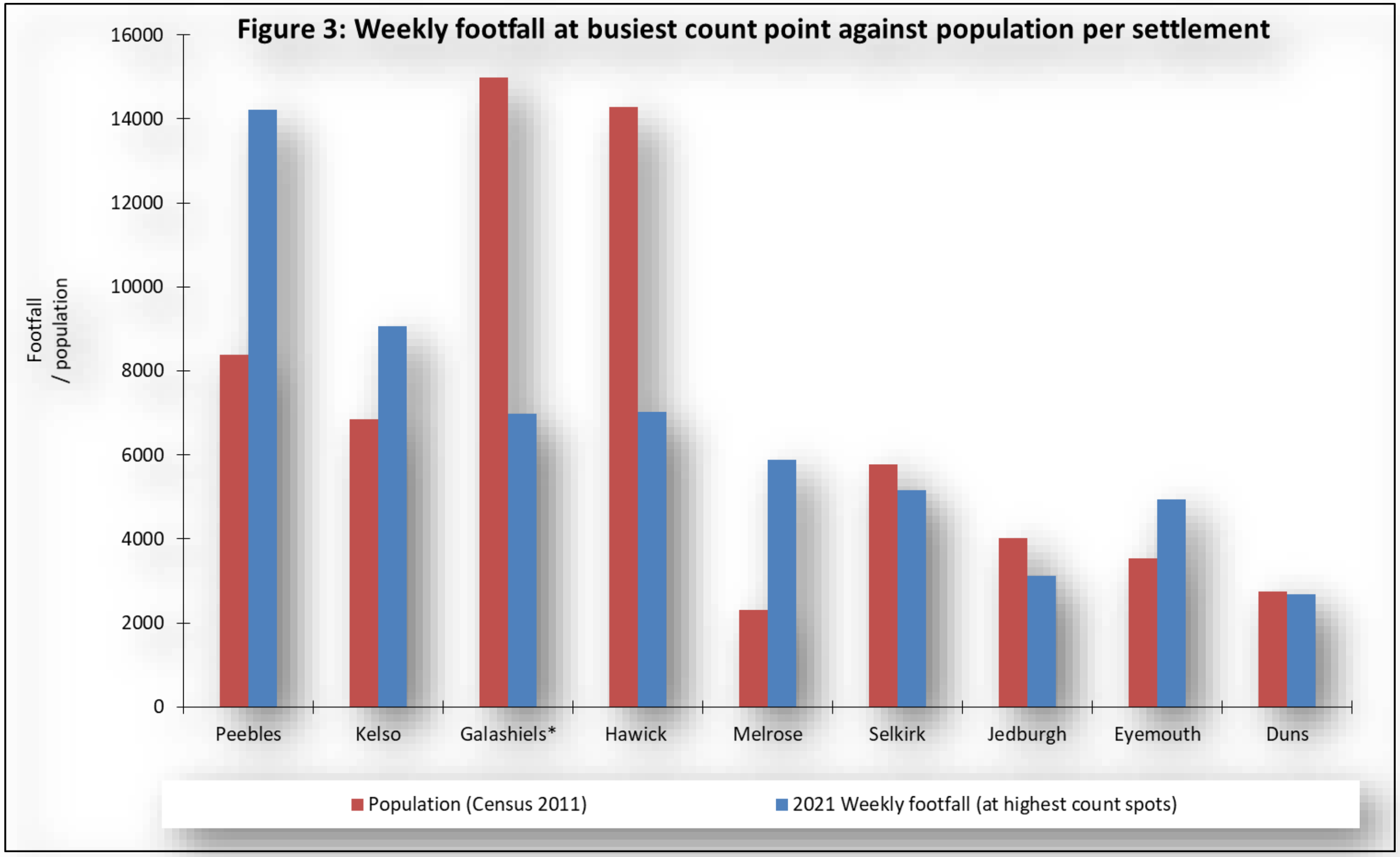


3. Population

3.1 Town centre footfall results vary widely, in some cases reflecting variance in settlement population. To illustrate this relationship, figure 3 shows average weekly footfall at each settlement's busiest count point (not including pedestrianised streets) against settlement population. The highest weekly footfall using this measure was recorded at Peebles High Street.

3.2 Figure 3 uses each settlement's busiest count point. This data provides a different insight into town centre performance to the average town centre footfall count. For example, a town centre which is large but dispersed may be assigned a higher number of low footfall count points than a smaller, denser town centre, which may find its average footfall across the count points lowered on that basis. Equally one high count point is not an accurate representation of a towns overall performance. The average weekly count per town (Table 1) gives the most appropriate figure for monitoring year on year change, for the purpose of comparing the performances of the town centres against each other. The highest recorded weekly count point per settlement against town population gives an indication of town centre's performance. Results for pedestrianised streets are also excluded for figure 3; unlike standard streets, for which a count is carried out on both pavements, only one count has been conducted on the few pedestrianised streets within the town centres [e.g. Channel Street, Galashiels; Green Street, Galashiels], affecting the degree to which they can reasonably be compared.

Figure 3: Weekly footfall at busiest count against population per settlement



* Galashiels population figure includes Tweedbank

4. Town by town analysis

4.1 This section looks at the performance of Individual towns. Each town centre has experienced its own particular pattern of change, as illustrated in figure 2; reference is made to the summer 2021 retail survey. The overall increase in footfall is largely due to the exceptionally low counts during from 2020, most towns have not returned to 2019 footfall numbers.

Duns

Duns records the lowest footfall of the surveyed towns, but this partly reflects the town's low population. A 9% increase was recorded this year from a 33% decrease on the previous year. Duns has the lowest busiest count point, see figure 3.

Duns has an above average retail unit vacancy rate (15%). The highest levels of footfall in the town continues to be recorded in Market Square.

Since the footfall studies began in 2007 Duns footfall has been on a slow downward trend, on average, in comparison to other towns, until 2020. Figure 2 shows there have been no significant changes in the previous 9 years, pre 2020.

Eyemouth

The monitoring of town centre footfall in the town of Eyemouth began later than other towns, in 2012.

The town's highest recorded footfall was in 2015, but over the last five years footfall has declined in the town. This year Eyemouth recorded an increase of 47% bringing the footfall back up to the figure recorded in 2018. Eyemouth is the only surveyed town with a footfall increase matching levels pre-pandemic.

The summer 2019 retail report shows that the retail vacancy of Eyemouth matches the Scottish Borders average of 12%.

The highest levels of footfall recorded in the town centre are generally in the area from the Co-op supermarket to the Market Square.

Galashiels

Galashiels was the only town to record no change in footfall from 2020; although, the town has the second highest footfall overall, which correlates with having a larger population. Galashiels town centre footfall has almost halved since 2007. The town saw a decrease in retail vacancy rate to 17% from summer 2019 and records the highest volume of floor space.

Figure 2 shows that the average weekly footfall for Galashiels has had a notable decrease in recent years, starting in 2019, from a previously steady decrease in previous years.

The council recognises there are challenges in Galashiels and, The Town Centre Core Activity Area Pilot Study, which was in place for from July 2018 for a year, allows more flexible range of uses within the 'core activity area'. The study has been extended until the next Local Development Plan is adopted. The Council's retail survey shows that there is notable vacancy and long-term vacancies along Channel Street and the Douglas Bridge area. Galashiels will also benefit from initial investment coming from the Borderlands Inclusive Growth Deal Place Programme project.

Hawick

Footfall in Hawick has been decreasing since 2007 (time of the global financial crash (GFC)). Between 2015 and 2019 average weekly footfall figures for Hawick were generally on an upward trend. However, during the 2020 lockdown restrictions footfall decreased by 15% making the count almost equivalent to the number recorded in 2014 (3,750).

The town's last recorded retail unit vacancy was 15% (summer 2019), this remains higher than the Borders average.

A flood protection scheme is well underway in Hawick, this project started in 2019, works include a new multipurpose path, 7km long, from Wilton Lodge to Mansfield lodge. The path will make the centre of Hawick more accessible to pedestrians and cyclists and could help increase footfall in the town centre. The council has secured £1.3 million in funding from Historic Environment Scotland, through their Conservation Area Regeneration Scheme (CARS) programme, for a range of heritage and conservation based regeneration activities within the core of the town centre. Along with some match funding, the scheme will run until 31st March 2024. The Town Centre Core Activity Area Pilot Study removed the core activity area in Hawick for a trial period of a year to promote a more flexible range of uses.

It is noted that Hawick has 5 supermarkets near to and on Commercial Road and Mart Street. These would be expected to have an effect on the High Street and town centre footfall.

Jedburgh

Jedburgh is the only surveyed town to witness a decrease in footfall from the 2020 count, see Figure 2; footfall numbers have also been declining since 2010. Although, the town had a relatively low decrease in footfall numbers compared to other towns in 2020. Footfall this year is at the lowest since recording began in 2007; the weather was fair and, therefore, unlikely to be a factor.

Jedburgh's town centre vacancy rate is above the Scottish Borders average. There is also ongoing issues with the safety of some buildings on the High Street/Market Place, which have required long-term scaffolding.

Jedburgh is one of four Scottish Borders Towns that will benefit from the first phase of the investment coming from the Borderlands Inclusive Growth Deal, Place Programme project.

Kelso

Footfall has increased this year by 9%, bringing the footfall count back to 2019 levels. 2015 was the highest footfall recorded for Kelso but overall, since 2007, footfall has decreased 14%. Kelso has fared significantly well in comparison with other towns. In terms of retail vacancy rate (2%), Kelso has consistently had one of the lowest vacancy rates and is well below the Scottish Borders average.

The town has benefitted from substantial capital investment in recent years; the 1.4m Kelso Townscape Heritage Initiative was led by the council and concluded in March 2015. Kelso is one of the surveyed towns whose footfall count is proportionally higher than its population size, see Figure 3.

Melrose

This year Melrose recorded an increase in footfall of 19%, since the previous year, although the footfall count has only come up to the level recorded in 2011. Generally, the figures for Melrose have been more consistent in comparison to the other 8 surveyed towns, see Fig2; in 2019 Melrose was the only surveyed town to see an increase in footfall.

Melrose has the lowest population of the 9 towns, but has been one of the strongest performing town centres in the Borders, it also has a low retail unit vacancy rate in the town centre.

The 2014 overall footfall figure for Melrose was an outlier resulting from exceptional levels of rainfall during the survey period.

Peebles

Peebles footfall has recorded an increase of 9%, following an 11% decrease the previous year during lockdown restrictions. Despite footfall declining, most notably since 2011, Peebles continues to record high footfall, recording the highest out of the 9 towns this year, with Galashiels seeing a significant drop the last two years. The town also had the busiest count point, see figure 3.

Although the town has experienced a loss of footfall since 2007, it has a low vacancy rate over this period when compared to the Scottish Borders average, and the town centre performs relatively well.

Selkirk

Selkirk's footfall increased by 29%, following one of the largest decreases among the Scottish Borders surveyed towns in 2020 during lockdown restrictions; a decrease of 39%. Although Selkirk's footfall had increased by 24% between 2017 and 2018, fig 2 shows that generally between 2014 and 2018 footfall in Selkirk had been on an upward trajectory.

Although, the two years 2016 and 2017 had an outlier in the survey on the Saturday of surveying. This appears to have resulted from footfall monitoring clashing with a public event. The results for Selkirk provided in this report for 2016 and 2017 where calculated using the Friday count. The normal footfall survey methodology is explained in Appendix 1.

The town has had significant investment recently. The Selkirk Conservation Area Regeneration Scheme (CARS) began in 2013 and finished in March 2018. This £1m project supported the repair and restoration of prominent town centre buildings. Public realm improvement work was also undertaken.

5. Weather

5.1 Weather has an impact on footfall levels and it is recorded through the survey process and considered when analysing findings, but data is reproduced as it was recorded and has not been altered to reflect weather conditions. To understand how weather may have affected survey results over recent years, the weather descriptions, which were recorded for each day of monitoring, have been rated numerically. The resulting findings are shown in table 4 below, where average weather results are a 0, better weather a high number, and worse weather a low number. These findings are also represented by colour, with green = good weather and red = poor weather.

5.2 Findings show weather in 2021 was below average on record, the current weather average count is -1, suggesting fair or dry weather with cloud cover. Previously, weather in 2013 had been worse than any other year, and 2010 was moderately poor. This year's results show that despite the weather being moderately poor footfall counts have risen since lockdown restrictions the previous year.

Table 4: Borders total weekly, footfall change (%) and overall weather rating

Year	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Total weekly footfall (exc. Eyemouth)	46530	46140	45210	41640	38470	38860	35800	31740	36010	36320	35500	35430	33360	26450	28240
% change	n/a	-1	-2	-8	-8	1	-8	-11	13	1	-2	0	-6	-21	7
Total weekly footfall (inc. Eyemouth)	-	-	-	-	-	41080	37680	33890	38280	38440	37510	37360	35050	27740	30140
% change	n/a	-	-	-	-	-	-8	-10	13	0	-2	0	-7	-22	9
Overall weather rating	6	-1	4	-8	-5	-2	-11	-4	6	5	2	5	0	1	-5

Appendix 1: Methodology

1.1A Pedestrian footfall is recorded at designated count points throughout each town centre. Figure 4 (below) illustrates the count points used in Galashiels. At each count point, enumerators count pedestrians who pass a designated count point area. On vehicular streets, the designated count point area consists of the full pavement width. For pedestrianised streets, the full width of the pedestrianised area is enumerated. Some groups of people are not included within the count: young children; postmen/women; traffic wardens; delivery staff etc.

1.2A A consistent approach is taken to allow accurate year-on-year comparisons to be made. The survey is conducted annually during September and October using the same methodology. This period avoids local and national holidays. Survey dates are scheduled to avoid clashing with special events recorded in the Council's events diary. Surveys are undertaken on Fridays and Saturdays.

1.3A Count point results are grossed up to provide estimates of the total number of pedestrians passing over a typical six hour period between 10am and 5pm [sic]. Weekly figures are generated by using a calculation based on previous survey evidence. Averages across all count points within a town centre are used to provide figures for Friday, Saturday and weekly footfall. Except where stated otherwise, findings in this report use the results for average weekly footfall.

1.4A When the 2015 survey was prepared, a new count point was surveyed at the pedestrian entrance to the Gala Water retail park (shown below in figure 4). This replaced a previous count point at Bank Close. For reasons of consistency, except where stated otherwise, results use the 29 Galashiels count points that have been monitored continuously since 2007.

Figure 4: Galashiels footfall survey count points