2023

SCOTTISH BORDERS COUNCIL FOOTFALL REPORT

Scottish Borders Council

Footfall Report 2023

Finalised March 2024

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 2023 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 and 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, two months into the first lockdown period. When the footfall surveys were conducted in September and October 2021, online retail in the UK had dropped to 28.2% (Office of National Statistics, May 2022). The 2021 footfall survey showed an overall increase in footfall in the Border towns, in correlation with the UK decrease in online retail sales. The 2023 online retail figures have stabilised at approximately 26% of all retail sales, a similar figure to 2022. However, retail footfall continues to fall in most of the Scottish Borders surveyed towns and around the UK.

Legacy of COVID-19 on footfall today

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 less than the January 2019 count [Statista 2022]. As restrictions were lifted in the autumn of 2021, the public's behavioural patterns changed in respect of visiting and shopping in town centres once again. However, High Street footfall remains lower than recorded in 2019. In the Scottish Borders, the small rise in footfall in town centres in 2021, as restrictions were gradually lifted, has not been sustained; 2023 shows an overall decrease in footfall over the nine surveyed towns of 4% (see Table 3).

Policy context

1.4 The Scottish Government responded to the challenges in town centres by initiating the Town Centre Action Plan, in 2013. The Plan included a range of policy and capital injection proposals, many of which the Scottish Government adopted. 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’ started with an initial £325 million capital to accelerate community led regeneration.

1.5 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.

1.6 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. 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. This Policy also supports other uses that will generate significant footfall, including commercial, offices, community, leisure, sport and cultural facilities.

1.7 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. Policy ED4 identifies Core Activity Areas to encourage public activity within central parts of certain town centres. These Areas ensure a range of commercial uses to encourage development that increases footfall in town centres and, in turn, prevents the gradual loss of essential town centre activities.

1.8 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.

1.9 The Council’s Retail Survey is monitoring additional and updated uses this year to reflect the recent changes to the Use Classes Order in Scotland. Furthermore, monitoring the additional uses also reinforces the policy principles set out within Policy 27 NPF4 (see 1.6 above). Businesses, cultural, social, leisure and sports facilities are being surveyed along with shops, professional services, food outlets and overnight accommodation. The addition of these uses can marginally affect retail vacancy rates.

1.9 The Council has exercised policy levers that are available, including regeneration schemes in Selkirk, Kelso, Jedburgh and Hawick. The Conservation Area Regeneration Schemes (CARS) in Selkirk, Jedburgh and Kelso are complete, while Hawick remains active and is due to complete in 2025. 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.

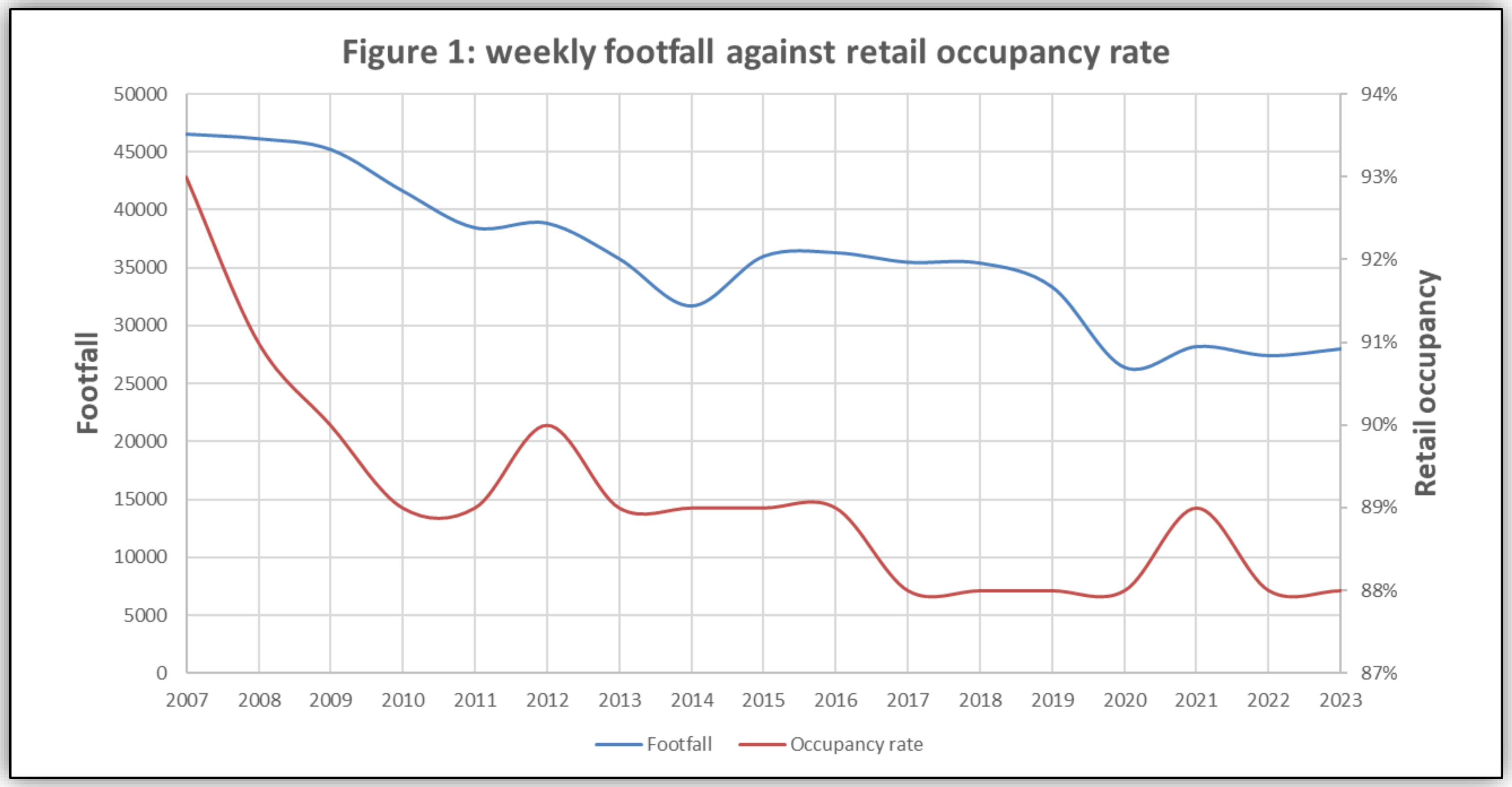
2. Footfall trends 2007 – 2023

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; despite a general increase in 2021, footfall dropped again in 2022 and 2023 and is still generally lower than 2019 figures.

Table 1: average weekly footfall per settlement 2007-2023

Settlement	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
Peebles	9840	8980	9500	8590	8120	7940	7140	7610	7930	8100	8020	7580	7400	6550	6860	7370	7600
Galashiels	9650	9470	8780	8220	8190	8380	8220	7930	8180	8080	7970	7910	7080	4740	4760	4500	4170
Kelso	5050	5170	5210	4790	4170	4360	4130	4980	5550	5340	5050	4690	4430	4010	4360	3920	3810
Hawick	9680	9990	9740	9130	8190	7480	6200	3750	4360	4730	4680	5090	4590	3920	4080	3610	2990
Melrose	3540	3340	3420	3200	2930	3430	3390	990	3550	3370	3050	3140	3280	2500	2970	2950	2980
Jedburgh	2920	3400	3260	2960	2710	2900	2700	2610	2460	2310	2450	2180	2080	1890	1740	1520	1370
Selkirk	3690	3590	3250	2930	2580	2660	2420	2090	2350	2710	2670	3300	3050	1870	2410	2290	2600
Duns	2160	2200	2050	1820	1580	1710	1600	1780	1630	1680	1610	1540	1450	970	1060	1300	1060
TOTAL (exc. Eyemouth)	46530	46140	45210	41640	38470	38860	35800	31740	36010	36320	35500	35430	33360	26450	28240	27460	26580
Eyemouth	-	-	-	-	-	2220	1880	2150	2270	2120	2010	1930	1690	1290	1900	1800	1460
TOTAL (inc Eyemouth	-	-	-	-	-	41080	37680	33890	38280	38440	37510	37360	35050	27740	30140	29260	28040

Figure 1: Weekly footfall against retail occupancy rate 2007-2023



2.2 Table 2 (below) shows year-on-year percentage changes, rises are shown in pink, no change in pale pink and falls in white. The table shows that overall there has been a decrease of 4% recorded across the surveyed towns over the last year. The 9% change in 2020-21 was the result of people returning to High Streets when restrictions were lifted as a result of the COVID-19 pandemic; the last two footfall surveys have recorded a similar decrease. The table highlights a decrease in footfall numbers in most towns, with the exception of Melrose, Peebles and Selkirk. Figure 2 (below) shows the average weekly footfall per settlement from 2007 to 2023 in graph form.

Table 2: Annual percentage year-on-year change in average weekly footfall per settlement, 2007-23

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	2021-22	2022-23
Duns	2	-7	-11	-13	8	-6	11	-8	3	-4	-4	-6	-33	3	23	-18
Galashiels	-2	-7	-6	0	2	-2	-4	3	-1	-1	-1	-10	-33	0	-5	-7
Hawick	3	-3	-6	-10	-9	-17	-40	16	8	-1	9	-10	-15	4	-12	-17
Jedburgh	16	-4	-9	-8	7	-7	-3	-6	-6	6	-11	-5	-9	-8	-13	-10
Kelso	2	1	-8	-13	5	-5	21	11	-4	-5	-7	-6	-9	3	-10	-3
Melrose	-6	2	-6	-8	17	-1	-71	259	-5	-9	3	4	-24	19	-1	1
Peebles	-9	6	-10	-5	-2	-10	7	4	2	-1	-5	-2	-11	5	7	3
Selkirk	-3	-9	-10	-12	3	-9	-14	12	15	-1	24	-8	-39	23	-5	14
Total (exc. Eyemouth)	-1	-2	-8	-8	1	-8	-11	13	1	-2	0	-6	-21	7	-3	-3
Eyemouth						-15	14	6	-7	-5	-4	-12	-24	47	-5	-19
Total (inc. Eyemouth)						-8	-10	13	0	-2	0	-6	-21	9	-3	-4

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 following the general trend of declining footfall nationally.

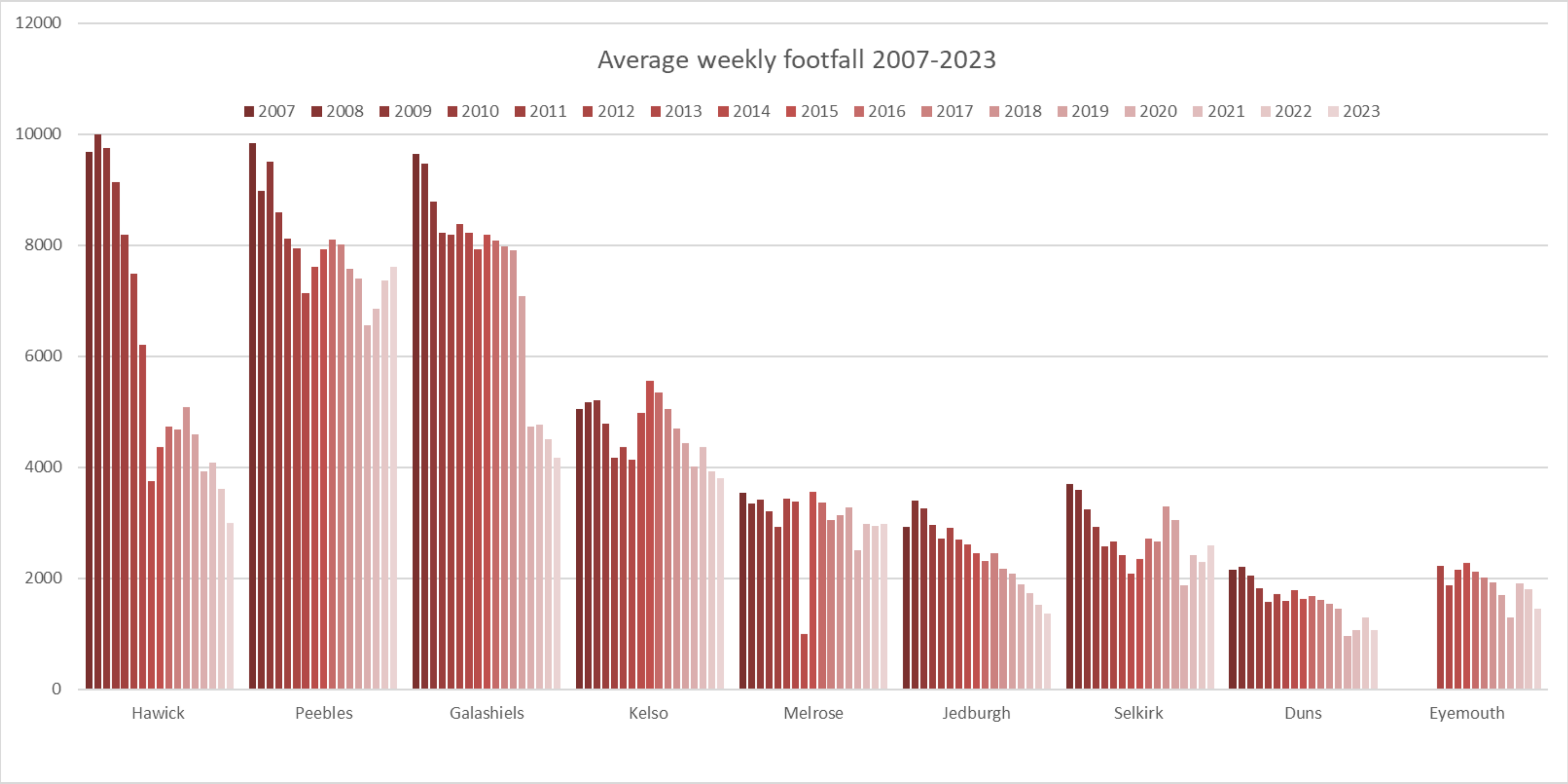
2.4 Retail data, from the whole of the UK for 2023, showed 'Sales by Value' (amount spent) are 17% higher than pre-pandemic figures, however, sales by volume are 3% lower. This growth is primarily due to rising prices because of inflation and, therefore, a rise in amount spent does not necessarily correlate with footfall increases and decreases. (Office of National Statistics reported in the Guardian 17/11/23)

Table 3: Total weekly footfall – year on year percentage change 2016-2023

Area	2016 to '17	2017 to '18	2018 to '19	2019 to '20	2020 to '21	2021 to '22	2022 to '23
UK	-2%	-1%	-2%	-45%	12%	10%	-3%
Scottish Borders	-2%	0%	-7%	-21%	9%	-3%	-4%

Source: MRI Software

Figure 2: Average weekly footfall 2007-2023



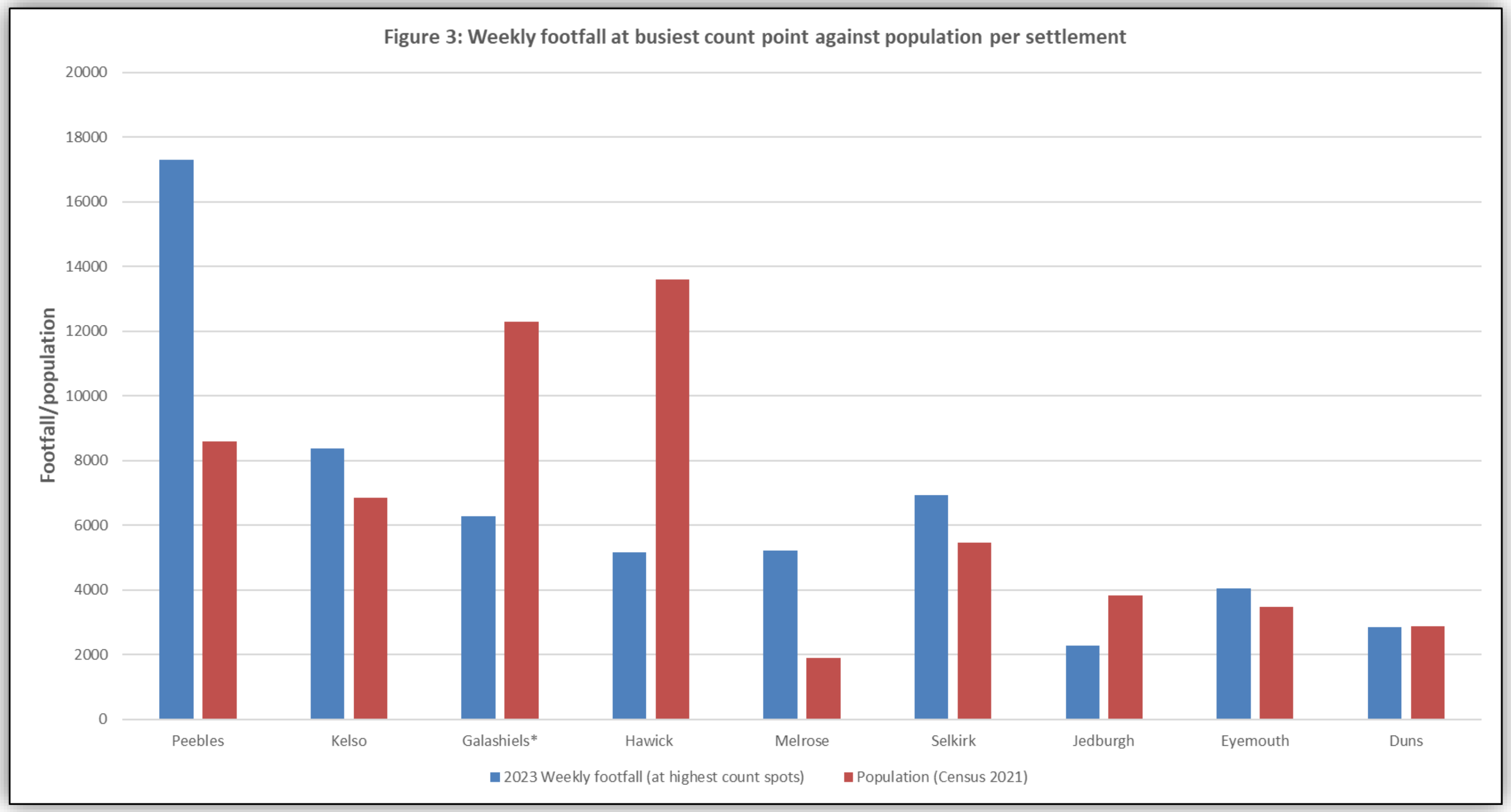
3. Population

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 against settlement population. Results for pedestrianised streets are not used 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. The highest count point in one of Galashiels' pedestrianised areas is 13,550; this is more than double the highest non-pedestrianised count point. The highest count point in Melrose's pedestrianised Market Square is 6,350; although this is only a 20% difference with the town's highest non-pedestrianised count point.

3.2 The data, shown in Figure 3, 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 isn't an accurate representation of a town's 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.

3.3 Peebles, Kelso, Melrose, Eyemouth and Selkirk all have footfall counts higher than their population. Galashiels and Hawick have the largest populations; their footfall counts are relatively low in comparison. Duns is the only town with a close correlation between its population and footfall count. The highest weekly footfall count in 2023 was recorded at Peebles High Street.

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 pattern of change, as illustrated in Figure 2; reference is made to the summer 2023 retail survey. The overall decrease in footfall is partly due to the rise in 2021 after the exceptionally low counts from 2020, most towns have not returned to 2019 footfall numbers.

Duns

Duns records the lowest footfall of the surveyed towns and the second lowest busiest count point (see figure 3); this partly reflects the town's low population of 2887. After footfall increasing in Duns in 2022 by 23%, the town had an 18% decrease: with the footfall count equalling the 2021 count. The highest levels of footfall recorded in the town continues to be in Market Square.

Duns has an above average retail unit vacancy rate. Since the footfall counts began in 2007, Duns footfall, although decreasing following the global economic downturn in 2007/8, has had intermittent ups and downs over the years, before and after 2020.

Weather on survey days: sunny and warm.

Eyemouth

The monitoring of town centre footfall in the town of Eyemouth began later than other towns, in 2012. The highest levels of footfall recorded in the town centre are generally in the area from the Co-op supermarket to the Market Square.

The town's highest recorded footfall was in 2015, footfall has declined in the town up until 2020. In 2021, Eyemouth recorded an increase of 47% bringing the footfall back up to the figure recorded in 2018. Eyemouth is the only surveyed town with footfall counts, in both 2021 and 2022, matching pre-pandemic levels in 2018 and 2019.

However, the 2023 footfall count for Eyemouth decreased 19% on the previous year. The summer 2023 retail report shows that the retail vacancy of Eyemouth is at 11% just below the Scottish Borders average of 12%.

Weather on survey days: overcast with bright spells and heavy rain at times.

Galashiels

Galashiels has not recovered from the significant 33% decrease in footfall, caused by the pandemic restrictions in 2020. There was no change to the footfall figures in 2021 and a further decrease of 5% and 7% in footfall in 2022 and 2023 respectively, see figure 2.

Although, the town has the second highest footfall overall, which correlates with having a larger population, Galashiels town centre footfall is less than half its 2007 count. However, the town's retail vacancy rate has seen a decrease of 1% in summer 2023 and Galashiels still records the highest volume of floor space.

The council recognises there are challenges in Galashiels and the Town Centre Core Activity Area Pilot Study, which was initially in place from July 2018 for a year, examined ways to revitalise and reinvigorate the town centre. The study will now remain in place until the new retail policy is adopted as part of the next Local Development Plan (LDP). The Council's retail survey shows that there are 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.

Weather on survey days: rain.

Hawick

Footfall in Hawick has been decreasing since 2007. 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). In 2021 footfall increased marginally from last year (to 4080), however, for the last two counts in 2022 and 2023 the figure is below the 2014 low count, standing at 2990 (see figure 2).

In the summer 2021, 2022 and 2023 retail surveys, the town's retail unit vacancy was 14%, this remains 2% higher than the Borders average. Works associated with the Flood Protection Scheme (FPS) have been causing disruption on Commercial Road and in the Common Haugh car park. The FPS 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 2025. 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 should be noted that the study will now remain in place until the new retail policy is adopted as part of the next Local Development Plan (LDP).

It is noted that Hawick has 5 supermarkets near to and on Commercial Road and Mart Street. These would be expected to affect footfall on the High Street and town centre. Inclusion of the new use classes in the retail survey from summer 2023 (see 1.9 above) showed that Hawick had the highest number of social/community venues of all the towns surveyed for the retail survey. The number of clubs and community buildings partly reflects Hawick having the largest population in the Borders region, it also shows that the town has other areas of vitality, likely at other times of the day and evening, that are not captured by the footfall counts.

Weather on survey days: intermittent rain and cloud.

Jedburgh

Jedburgh is the only surveyed town to witness a decrease in footfall in both 2021 (-8%) and 2022 (-13%) after the low pandemic period 2020 count, see Figure 2; footfall decreased again this year to 1370, -10% from 2022. 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, there was light rain recorded during the count days, therefore, the weather could be a factor.

Jedburgh's town centre vacancy rate of 12% has decreased since last year and is equivalent to the Scottish Borders average.

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.

Weather on survey days: light rain.

Kelso

Footfall has decreased for the second year in a row, down by 3% on last year, bringing the footfall count below 2020 levels. 2015 was the highest footfall recorded for Kelso but overall, since 2007, footfall has decreased 25%. Kelso has fared significantly well in comparison with other towns, maintaining a low retail vacancy rate this year (3%). 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).

Weather on survey days: overcast and raining at times.

Melrose

This year Melrose recorded a small increase in footfall of 1%, since the previous year, an almost identical number to 2021. Generally, the figures for Melrose have been more consistent in comparison to the other 8 surveyed towns, (see Figure 2); 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 lower retail unit vacancy rate (8%) in the town centre than other towns. Melrose also has the highest proportion of footfall to population out of the 9 surveyed towns (see Figure 3).

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

Weather on survey days: sunny and hot.

Peebles

Peebles is one of three towns that has recorded an increase in footfall (3%) this year, following on from a 7% increase in 2022. Despite footfall declining up to 2020, Peebles continues to record high footfall, recording the highest out of the 9 towns each year since 2019. 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 (4%) over this period when compared to the Scottish Borders average, and the town centre performs relatively well. Footfall has increased for 3 consecutive years post 2020.

Weather on survey days: overcast.

Selkirk

Selkirk's footfall increased by 14% this year, despite a lesser decrease last year; only 3 towns saw an increase in footfall this year. Selkirk has a similar pattern of decrease and increase to Peebles and Kelso, having declining footfall from 2007 to 2013/14 and then improved footfall from then to 2019. All three towns have seen a rise in footfall, on average, over the last three years, post 2020.

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.

Weather on survey days: overcast and windy.

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 2023 was just average, the current weather average count is 0, suggesting fair or dry weather. The average weather rating was the result of a mix of weather in different towns, as mentioned above. This year's results show that, despite the weather being moderately fair, footfall counts have decreased overall since the rise immediately after lockdown restrictions were lifted in 2021.

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	2022	2023
Total weekly footfall (exc. Eyemouth)	46530	46140	45210	41640	38470	38860	35800	31740	36010	36320	35500	35430	33360	26450	28240	27460	26580
% change	n/a	-1	-2	-8	-8	1	-8	-11	13	1	-2	0	-6	-21	6	-3	-3
Total weekly footfall (inc. Eyemouth)	-	-	-	-	-	41080	37680	33890	38280	38440	37510	37360	35050	27740	30140	29260	28040
% change	n/a	-	-	-	-	-	-8	-10	13	0	-2	0	-7	-22	9	-3	-4
Overall weather rating	6	-1	4	-8	-5	-2	-11	-4	6	5	2	5	0	1	-5	-1	0

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; traffic wardens; delivery staff (including post office delivery people) 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 point