2025

SCOTTISH BORDERS COUNCIL
TOWN CENTRE & RETAIL SURVEY

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Key findings

- 1,539 units were surveyed across 18 settlements in the Scottish Borders.
- The overall Scottish Borders unit vacancy rate in summer 2025 is 12%. This rate is three percentage points below the UK average unit vacancy rate of 15%.
- The 12% vacancy rate represents 180 vacant units. Of these, 45 have been long-term vacant (vacant for at least five years).
- Of the 18 settlements included in the survey, five have seen an increase in vacancy rates: Coldstream, Earlston, Melrose, Peebles and West Linton; seven recorded a decrease in vacancies: Duns, Eyemouth, Galashiels, Hawick, Innerleithen, Jedburgh and Newtown St Boswells; and the remaining six were unchanged from summer 2024: Chirnside, Kelso, Lauder, Selkirk, St Boswells and Tweedbank.
- In the two largest towns, Galashiels and Hawick, the unit vacancy rate is 15% and 13% respectively. Galashiels' vacancy rate has decreased by one percentage point, and Hawick's by two.
- Tweedbank and Lauder were the only towns to record no vacancies.
- There are 32 town centre charity shops across the surveyed settlements, a decrease of two units compared to summer 2024. This is 4% of all retail units, and 2% of all units surveyed.
- Duns retains the highest long-term vacancy[1] rate at 8%, and Hawick has the highest number of long-term vacant units at 12 units. The Scottish Borders average long-term vacancy rate is 3%.

[1] For the purposes of this study, long-term vacancy is defined as a unit vacant for five years or longer.

1. Introduction

1.1.1. This report sets out the results of the Council's survey of ground floor town centre units within 18 Scottish Borders settlements. The purpose of the survey is to monitor town centre health, informing the Council's town centre planning policies.

1.1.2. Since 2007, retail units, food outlets, holiday accommodation (hotels, B&Bs, and hostels), and public facing offices for professional services have been counted to monitor how well town centres are performing.

1.1.3. The units being surveyed since the summer 2023 audit, now include a wider range of businesses and uses (within use class 4, see below), residential institutions (e.g. care homes; use class 8), non-residential institutions (e.g. creches and community halls; use class 10), and places of assembly and leisure (e.g. cinemas and bowling clubs; use class 11).

1.1.4. The town centres covered by the study are those with a population of over 1,000:

- Chirnside
- Coldstream
- Duns
- Earlston
- Eyemouth
- Galashiels[2]
- Hawick
- Kelso
- Lauder
- Melrose
- Newtown St Boswells
- Peebles
- Selkirk
- St Boswells
- Tweedbank
- West Linton

1.1.5. Appendix 1 provides a glossary of terms used in this report.

[2] Note: two centres are monitored in Galashiels, the town centre and a second centre at Wilderhaugh. Where this report refers to Galashiels this will always refer to Galashiels town centre only, unless stated otherwise.

2. Policy Context

2.1.1. National Planning Framework 4 (NPF4) was adopted by Scottish Ministers on 13 February 2023, replacing National Planning Framework 3 and Scottish Planning Policy. NPF4 incorporates updated Scottish Planning Policy, containing detailed national policy on a range of planning topics. NPF4 now forms part of the Development Plan, alongside the adopted Local Development Plan (2024).

2.1.2. Policy 27 of NPF4 encourages the facilitation of development in our city and town centres, recognising they are a national asset. Furthermore, Policy 27 maintains the policy stance of a Town Centre First approach, with desired outcomes focusing on vibrant and healthy places for people to live, learn, work, enjoy and visit. A Town Centre First approach is the focus of town centre policy, which encourages a flexible mix of footfall-generating uses, to maintain vitality and viability within town centres.

2.1.3. At a local level, the Council's Local Development Plan (LDP) was adopted in August 2024. The LDP includes Policy ED4 Core Activity Areas in Town Centres; the policy encourages retail and food units, which increase footfall, within the central part of town centres, encouraging greater town centre activity.

2.1.4. Policy ED4 was revised as part of the Proposed LDP, which saw the removal of the Core Activity Areas for Hawick and Stow. The Galashiels Core Activity Area was reduced in size to only include Bank Street and part of Market Street. Channel Street and Douglas Bridge were removed from the designation. As the Core Activity Areas for Kelso, Melrose and Peebles continue to perform at a comparatively high level, there was less requirement for additional flexibility of uses, and these were retained unchanged.

2.1.5. The current Town Centre and Retail Survey for the Scottish Borders will continue to include the changes to the methodology that were introduced in summer 2023. Surveys and reporting now take into consideration the policy requirements set out within NPF4 and the implications of the recent update to the Use Class Order (UCO). The new UCO supersedes the former UCO (Scotland) 1997. The most significant change, in relation to this survey report, is that Use Class 1A now covers shops *and* financial & professional services.

3. Methodology

3.1.1. The survey covers the town centre of each of the surveyed settlements; explained in detail in Appendix 1. The Council's retail survey is undertaken every 12 months[3]. The survey only includes the units that fall within each of the settlement's town centre boundaries as shown in the Local Development Plan. Where there is no defined town centre boundary in the LDP, a boundary has been identified that includes the retail focus of the town. Any units that fall outwith these boundaries are excluded from the survey.

3.1.2. The survey includes only ground floor units operating within the following use classes:

- Class 1A – shops, and financial, professional & other services
- Class 3 – food and drink
- Class 3 – non-classified (sui generis) – predominantly hot food takeaways
- Class 4 – business
- Class 7 – hotels and hostels
- Class 8 – residential institutions
- Class 10 – non-residential institutions
- Class 11 – assembly and leisure
- Sui generis

3.1.3. Appendix 2 provides more detail of the Retail and Town Centre Survey methodology and process. Appendix 3 provides detailed descriptions of the use classes referred to in this report.

[3] Note: Until 2023, retail surveys were carried out every 6 months, in the summer and winter.

4. Results – Summer 2025

4.1. Number of units and vacancy rates

4.1.1. Between 2007 and 2023, the results of the retail survey focused on Use Classes 1, 2, 3 and 7; namely, shops, professional services, food outlets, and hotels and B&Bs. Since summer 2023, the audit now includes a wider range of businesses and uses, reflective of the revised Scottish use class order (as detailed in the previous section).

4.1.2. In total, 1,539 units were counted as part of the summer 2025 survey, and of these, 180 of all units were vacant at the time of surveying. The overall Scottish Borders vacancy rate is 12%. This is below the UK national average of 15% (source: Knight Frank).

4.1.3. Table 1 shows the results of the summer 2025 survey, including the total number of units per settlement, the number of vacant units per settlement and the vacancy rate.

Table 1 Number of units and vacancy rates by settlement

Settlement	Number of units	Number of vacant units	Vacancy rate
CHIRNSIDE	9	1	11%
COLDSTREAM	42	6	14%
DUNS	66	13	20%
EARLSTON	19	2	11%
EYEMOUTH	74	5	7%
GALASHIELS	252	39	15%
GALASHIELS 2nd	47	7	15%
HAWICK	285	36	13%
INNERLEITHEN	57	7	12%
JEDBURGH	100	13	13%
KELSO	187	11	6%
LAUDER	20	0	0%
MELROSE	82	5	6%
NEWTOWN ST BOSWELLS	11	3	27%
PEEBLES	153	11	7%
SELKIRK	100	18	18%
ST BOSWELLS	16	1	6%
TWEEDBANK	3	0	0%
WEST LINTON	16	2	13%
TOTAL	**1,539**	**180**	**12%**

4.1.4. Settlement vacancy rates vary across the Scottish Borders with Newtown St Boswells and Duns recording the highest vacancy rates at 27% and 20% respectively. Table 1 shows that some settlements have a relatively small number of shops and, therefore, any increase or decrease in vacancy can significantly affect the overall percentage. Galashiels (including Galashiels 2nd centre) and Hawick together account for 46% of all vacant units. No vacant units were recorded in Lauder and Tweedbank although these units have a relatively low number of units overall (20 and three), compared to most other settlements.

4.1.5. Table 2 shows the changes in vacancy rates since the previous audit in summer 2024. Since the last audit, the overall Scottish Borders vacancy rate has remained steady at 12%.

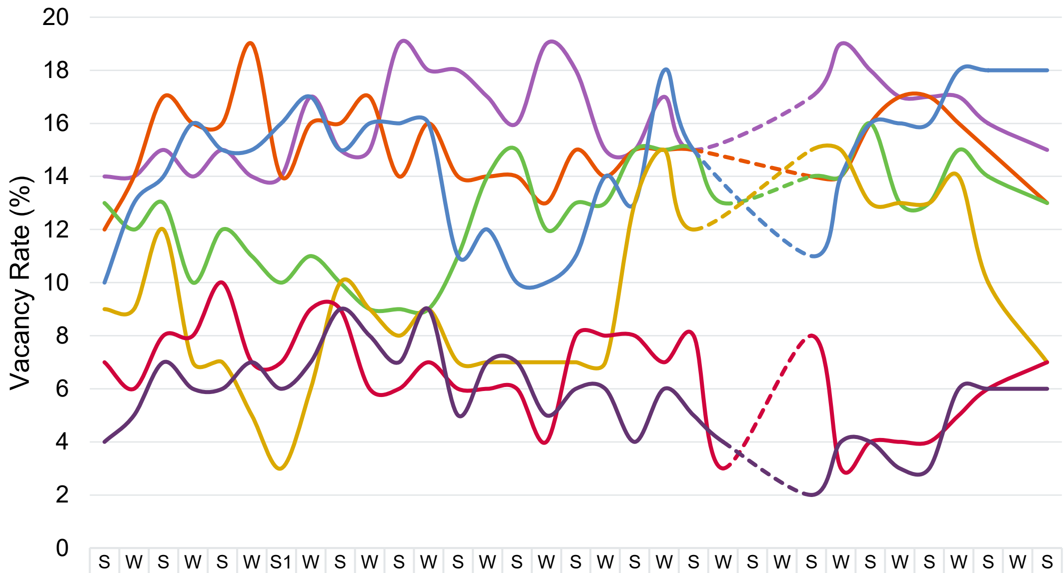
Table 2 Vacancy rate changes over the last 12 months

	Summer 2024			Summer 2025			
Settlement	Number of units	Number of vacant units	Vacancy rate	Number of units	Number of vacant units	Vacancy rate	Increase/ decrease
CHIRNSIDE	9	1	11%	9	1	11%	-
COLDSTREAM	42	5	12%	42	6	14%	^
DUNS	64	14	22%	66	13	20%	v
EARLSTON	19	2	11%	19	2	11%	^
EYEMOUTH	73	7	10%	74	5	7%	v
GALASHIELS	251	40	16%	252	39	15%	v
GALASHIELS 2nd centre	47	7	15%	47	7	15%	-
HAWICK	285	43	15%	285	36	13%	v
INNERLEITHEN	57	8	14%	57	7	12%	v
JEDBURGH	99	14	14%	100	13	13%	v
KELSO	187	11	6%	187	11	6%	-
LAUDER	20	0	0%	20	0	0%	-
MELROSE	82	3	4%	82	5	6%	^
NEWTOWN ST BOSWELLS	11	4	36%	11	3	27%	v
PEEBLES	153	9	6%	153	11	7%	^
SELKIRK	101	18	18%	100	18	18%	-
ST BOSWELLS	16	1	6%	16	1	6%	-
TWEEDBANK	3	0	0%	3	0	0%	-
WEST LINTON	16	1	6%	16	2	13%	^
TOTAL	**1,535**	**188**	**12%**	**1,539**	**180**	**12%**	**-**

4.1.6. At a settlement level, most of the variation since summer 2024 is relatively small, with increases and decreases of between one and three percentage points. In almost all settlements, this represents a change in status of one to two units per settlement.

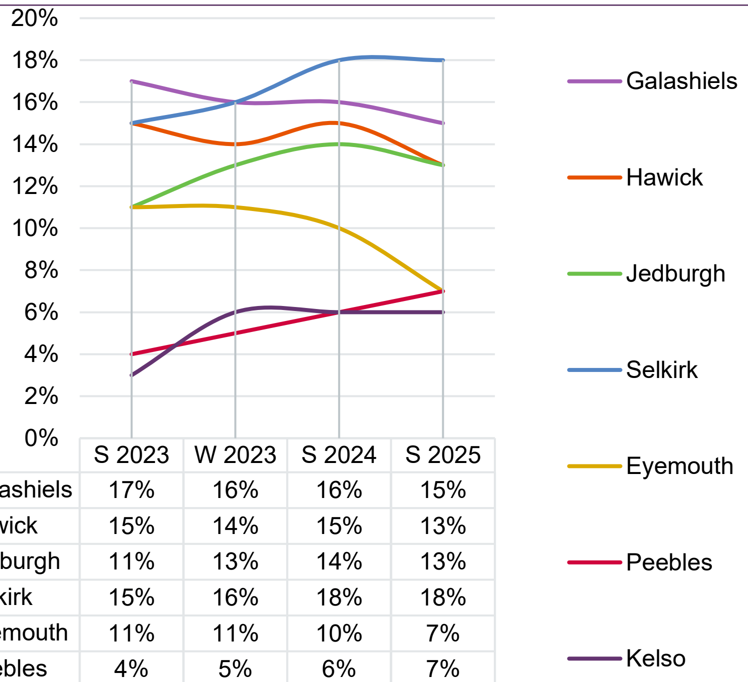
4.1.7. The Newtown St Boswells vacancy rate has decreased from 36% to 27%; this represents a decrease by one unit. Eyemouth vacancy has decreased from 10% to 7%, a decrease of two units. West Linton vacancies have increased from 6% to 13%; however, again, this was caused by the increase in number of vacant units from one to two. The highest numerical increase in vacant units was in Hawick, where the total number of vacant units increased by seven. This is an increase of two percentage points, reflecting the relatively high number of units in Hawick, compared to most other settlements in the borders.

4.1.8. Figure 1 shows the longer-term vacancy rates for the seven largest towns by population. To ensure comparable data, this figure counts units of the use classes included in this survey prior to the methodology changes introduced in 2023. The dotted line indicates the gaps in data due to covid-related restrictions. Figure 2 shows vacancy rates since all units included since 2023 using the revised methodology as in detailed in the previous section.



	S 09	W 09	S 10	W 10	S 11	W 11	S12	W 12	S 13	W 13	S 14	W 14	S 15	W 15	S 16	W 16	S 17	W 17	S 18	W 18	S 19	W 19	S 20	W 20	S 21	W 21	S 22	W 22	S 23	W 23	S 24	W 24	S 25
Galashiels	14	14	15	14	15	14	14	17	15	15	19	18	18	17	16	19	18	15	15	17	15				17	19	18	17	17	17	16		15
Hawick	12	14	17	16	16	19	14	16	16	17	14	16	14	14	14	13	15	14	15	15	15				14	14	16	17	17	16	15		13
Jedburgh	13	12	13	10	12	11	10	11	10	9	9	9	11	14	15	12	13	13	15	15	15	13			14	14	16	13	13	15	14		13
Selkirk	10	13	14	16	15	15	16	17	15	16	16	16	11	12	10	10	11	14	13	18	15				11	14	16	16	16	18	18		18
Eyemouth	9	9	12	7	7	5	3	6	10	9	8	9	7	7	7	7	7	7	13	15	12				15	15	13	13	13	14	10		7
Peebles	7	6	8	8	10	7	7	9	9	6	6	7	6	6	6	4	8	8	8	7	8	3			8	3	4	4	4	5	6		7
Kelso	4	5	7	6	6	7	6	7	9	8	7	9	5	7	7	5	6	6	4	6	5	4			2	4	4	3	3	6	6		6

Figure 1 Unit vacancy rates (%) of seven largest towns 2009–2025 (pre-2023 use classes)



	S 2023	W 2023	S 2024	S 2025
Galashiels	17%	16%	16%	15%
Hawick	15%	14%	15%	13%
Jedburgh	11%	13%	14%	13%
Selkirk	15%	16%	18%	18%
Eyemouth	11%	11%	10%	7%
Peebles	4%	5%	6%	7%
Kelso	3%	6%	6%	6%

Figure 2 Unit vacancy rates of seven largest towns 2023–2025 (post-2023 use class orders)

4.2. Long-term vacancy

4.2.1. The length of time a vacant unit has been unoccupied can be an indicator of specific challenges faced by a town centre. Where a unit is long-term vacant (vacant for at least five years) there may be complex multifaceted causes of vacancy beyond direct market causes. For example, a unit's use could be prevented by a legal ownership dispute or legislative constraints which cannot be overcome. Furthermore, the value of commercial property may be linked to the rent it has yielded. Long-term vacancy may also result from the gradual decline of a specific part of a town centre.

4.2.2. Table 3 shows the number of units per settlement which have been vacant for at least five years in relation to total vacancies in 2025 and the total number of units.

Table 3 Long-term vacancy rates

Settlement	Long-term vacant units	Total vacancies 2025	Total units	% of vacancies long-term vacant	% of all units long-term vacant
CHIRNSIDE	0	1	9	0%	0%
COLDSTREAM	2	6	42	33%	5%
DUNS	5	13	66	38%	8%
EARLSTON	0	2	19	0%	0%
EYEMOUTH	1	5	74	20%	1%
GALASHIELS	9	39	252	23%	4%
GALASHIELS 2nd centre	4	7	47	57%	9%
HAWICK	12	36	285	33%	4%
INNERLEITHEN	0	7	57	0%	0%
JEDBURGH	4	13	100	31%	4%
KELSO	0	11	187	0%	0%
LAUDER	0	0	20	-	0%
MELROSE	1	5	82	20%	1%
NEWTOWN ST BOSWELLS	0	3	11	0%	0%
PEEBLES	1	11	153	9%	1%
SELKIRK	5	18	100	28%	5%
ST BOSWELLS	0	1	16	0%	0%
TWEEDBANK	0	0	3	-	0%
WEST LINTON	1	2	16	50%	6%
TOTAL	**45**	**180**	**1,539**	**25%**	**3%**

4.3. Individual settlement results

4.3.1. The unit vacancy rate in **Galashiels** has decreased by one percentage point since the previous audit. While this continues slight downward trend of recent audits from its peak of 19%, Galashiels' vacancy rate remains higher than the Scottish Borders and the UK national average vacancy rates. There are a cluster of vacant units on Douglas Bridge, the top of Channel Street and the north-west end of the High

Street. Many of the remaining vacant units are interspersed throughout the town centre. The vacancy rate within the **Galashiels 2nd Centre (Wilderhaugh)** has remained at 15%.

4.3.2. Between 2019 and 2024, the unit vacancy rate in **Hawick** varied between 14% and 17%. In summer 2025, the current vacancy rate has dropped to 13%, the lowest since 2016 and a drop of two percentage points since the previous survey in summer 2024. Hawick has the highest number of units at a total of 285 within its town centre and a much higher number of use class 10 (non-residential institutions) and 11 (assembly & leisure) compared to other Borders towns. This can be a positive indicator in a town as it relates to several criteria (e.g. social interaction, and identify & belonging) set out in the Place Standard tool for measuring the quality of a place.

4.3.3. Generally, Hawick's vacancies are dispersed throughout the High Street, Buccleuch Street and North Bridge Street; of the units west of the River Teviot, around Commercial Road, none are vacant. Hawick's town centre performance will continue to be monitored closely going forward following the removal of the town's Core Activity Area. The Hawick Conservation Area Regeneration Scheme (CARS) focused on a range of regeneration activities within the town centre over a six-year period from 2019-2025.

4.3.4. **Peebles** has consistently recorded a lower-than-average unit vacancy rate, although this has risen by one percentage point to 7% (11 vacant units), continuing a consistent trend since winter 2021 when its vacancy rate was 3%. This figure is still below the Scottish Borders average of 12%. Peebles town centre is still considered to be performing well.

4.3.5. **Kelso** has a below average vacancy rate of 6% (11 vacant units) which remains unchanged since winter 2023. Kelso has repeatedly recorded a lower-than-average vacancy rate in comparison to the Scottish Borders average and continues to perform well.

4.3.6. **Jedburgh's** unit vacancy rate has fluctuated between 13% and 16% over the last five years and sits at 13% in the current audit. This is a decrease of one percentage point compared to 2024. In recent years, Jedburgh town centre has been impacted by scaffolding and demolition works, limiting its accessibility. Jedburgh will continue to be monitored going forward.

4.3.7. The vacancy rate in **Selkirk** has remained at 18%, unchanged since the winter 2023 survey. This level of vacancy is considerably higher that the Borders average of 12%. Between 2012 and 2018, Selkirk received funding through the Selkirk Conservation Area Regeneration Scheme (CARS). This scheme provided grants for external repairs to qualifying buildings in the conservation area, in conjunction with upgrades to the streetscape.

4.3.8. **Eyemouth's** unit vacancy rate has decreased from 10% to 7% since the previous survey, bringing to comfortably below the Borders average. Eyemouth has received £400,000 through the Scottish Government's Place Based Investment Programme for redevelopment of the waterfront. The town continues to be particularly busy throughout the summer months.

4.3.9. Of the smaller towns not included in Figure 1, **Coldstream's** unit vacancy rate has increased from 12% to 14%, returning to the level of winter 2023. Due to the small number of units, this two-point percentage change represents an increase of one vacant unit, bringing the total back to six.

4.3.10. **Innerleithen's** unit vacancy rate has decreased from 14% to 12%, thanks to one additional unit becoming occupied. This continues a steady decrease in vacancy rate over the past two years, returning vacancy levels to that of summer 2023 and the lowest rate since the 2020 covid-19 outbreak. Between 2010 and 2020, vacancy rates in Innerleithen were typically below 8%. There has been recent investment in some of the vacant units, bringing improvement to the overall streetscape.

4.3.11. **Earlston's** vacancy rate remains unchanged at 11%. There are two vacant units out of a total of 19.

4.3.12. The unit vacancy rate of **Duns** has decreased from 22% to 20% with one additional unit now being occupied. This remains significantly higher than the Borders average and will continue to be monitored.

4.3.13. **Lauder's** unit vacancy rate remains at 0%. This contrasts to 2019, when Lauder's vacancy rate sat at 22%.

4.3.14. Since the previous retail survey, the vacancy rate for **Melrose** has increased from 4% to 6% with two additional vacant units. However, overall Melrose is still considered to be performing well, with a vacancy rate consistently below the Borders average.

4.3.15. **West Linton's** vacancy rate has increased from 6% to 13%; however, due to the small number of units in the settlement this represents an increase of only one newly vacant unit.

4.3.16. **St Boswells** has recorded a vacancy rate of 0% since 2018 (no data for 2020 and winter 2021); however, with the addition of one vacant unit in 2024 and unchanging in 2025, the vacancy rate now sits at 6%.

4.3.17. Historically, there have been significant fluctuations in the vacancy rates of **Chirnside, Newtown St Boswells** and **Tweedbank**. In part, these results simply reflect the low numbers of units in these settlements. This means any change in occupancy of a single unit has an outsize impact on the vacancy rate as a percentage. In this current audit, Chirnside's vacancy rate remains unchanged at 11%. Tweedbank continues to have no vacancies. Newtown St Boswells' vacancy rate has decreased from 36% to 27%. This is a decrease from four to three vacant units out of a total of 11.

4.3.18. Table 4 shows the overall Scottish Borders unit vacancy rate in relation to the **UK average vacancy rate** over the last five years. The Scottish Borders unit vacancy rate of 12% is currently three percentage points lower than the UK average of 15%. The Scottish Borders rate has remained unchanged since summer 2023 but the UK average has increased by one percentage point since summer 2024.

*Table 4 National and Scottish Borders vacancy rates 2021 – 2025**

	2021		2022		2023		2024	2025
	S	W	S	W	S	W	S	S
Scottish Borders vacancy rate	11%	**	13%	13%	12%	12%	12%	12%
UK vacancy rate	15%	**	14%	14%	14%	14%	14%	15%
Number of vacant units in the Borders	160	**	167	175	183	187	188	180

* S = summer, W = winter
** no data due to Covid-19 restrictions

4.4. Chains and multiples

4.4.1. The presence of chains, or businesses with multiple shops/offices, can be an indicator of external industry confidence in a town centre. High numbers of local independent shops can be an indicator of local confidence in a town centre and can be attractive to visitors. Table 5 shows the number of chain shops and offices which are operated by a parent company per settlement and the proportion of these in relation to the total number of shops and offices. The data covers use class 1A only; sui generis uses are excluded. The definition of a chain covers both regional and national businesses, and smaller local multiple shop/office chains.

4.4.2. Overall, 23% of all class 1A units (total 240 units) are operated by a parent company or are local/regional multiples. The highest proportion of chains/multiples (excluding Tweedbank, which only has two use class 1A units) is in Galashiels 2nd Centre at Wilderhaugh at 39% (12 units of 31). The main town centre of Galashiels has the next highest proportion of chains/multiples at 30% (58 units of 193). Many of the smaller settlements also appear to have a high proportion of chains/multiples. For example, Earlston also records 30% chains/multiples. However, this figure is misleadingly high as the small number of units means the percentage figure cannot be taken as meaningful. This applies to Earlston as well as Chirnside, Newtown St Boswells, St Boswells and Tweedbank.

Table 5 Number/proportion of 'Use Class 1A' units which are chains/multiples

Settlement	Number of chains / multiples (Class 1A)	Total number of Class 1A Units	% of Class 1A units which are chains / multiples
CHIRNSIDE	1	4	25%
COLDSTREAM	4	25	16%
DUNS	8	40	20%
EARLSTON	3	10	30%
EYEMOUTH	9	36	25%
GALASHIELS	58	193	30%
GALASHIELS 2nd CENTRE	12	31	39%
HAWICK	38	191	20%
INNERLEITHEN	2	37	5%
JEDBURGH	11	66	17%
KELSO	34	135	25%
LAUDER	2	11	18%
MELROSE	14	60	23%
NEWTOWN ST BOSWELLS	2	10	20%
PEEBLES	24	111	22%
SELKIRK	14	68	21%
ST BOSWELLS	2	8	25%
TWEEDBANK	1	2	50%
WEST LINTON	1	11	9%
TOTAL	**240**	**1049**	**23%**

4.5. Use Classes

4.5.1. The town centre survey categorises units by their Use Class Order, as defined through the Town and Country Planning (Use Classes) (Scotland) Order 1997 (as amended), and by the Council's own categorisation system. Only units operating within the following use class categories are monitored through the survey:

- Class 1A – shops, financial, professional and other services
- Class 3 – food and drink; class 3 non-classified (sui generis)
- Class 4 – business
- Class 7 – hotels and hostels
- Class 8 – residential institutions
- Class 10 – non-residential institutions
- Class 11 – assembly and leisure
- Sui generis

4.5.2. These categories are explained in further detail in Appendix 2. By categorising the units by use class, it is possible to establish whether a particular type of unit is in decline and where concentrations of use classes are located.

4.5.3. Table 6 and Figure 3 provide a breakdown of total unit numbers organised by use class. Of the total 1,539 units included in the Retail and Town Centre Survey, 1,049 (68%) operate as shops and professional services (use class 1A), 132 (9%) are restaurants and cafes (use class 3), and 114 (7%) are a combination of town halls, community centres, museums, children's nurseries and other uses within use class 10. The remaining surveyed units are made up of use classes 3(non-classified, 4, 7 and 11 and 71 sui generis units (unclassified uses).

Table 6 Scottish Borders total number of units by use class

Use Class	Scottish Borders total	% of all units
Class 1A - shops, financial, professional and other services	1,049	68%
Class 3 - food and drink	132	9%
Class 3 - non-classified (sui generis)	69	4%
Class 4 - business	32	2%
Class 7 - hotels and hostels	41	3%
Class 8 - residential institutions	3	0.2%
Class 10 - non-residential institutions	114	7%
Class 11 - assembly and leisure	28	2%
Sui generis	71	5%

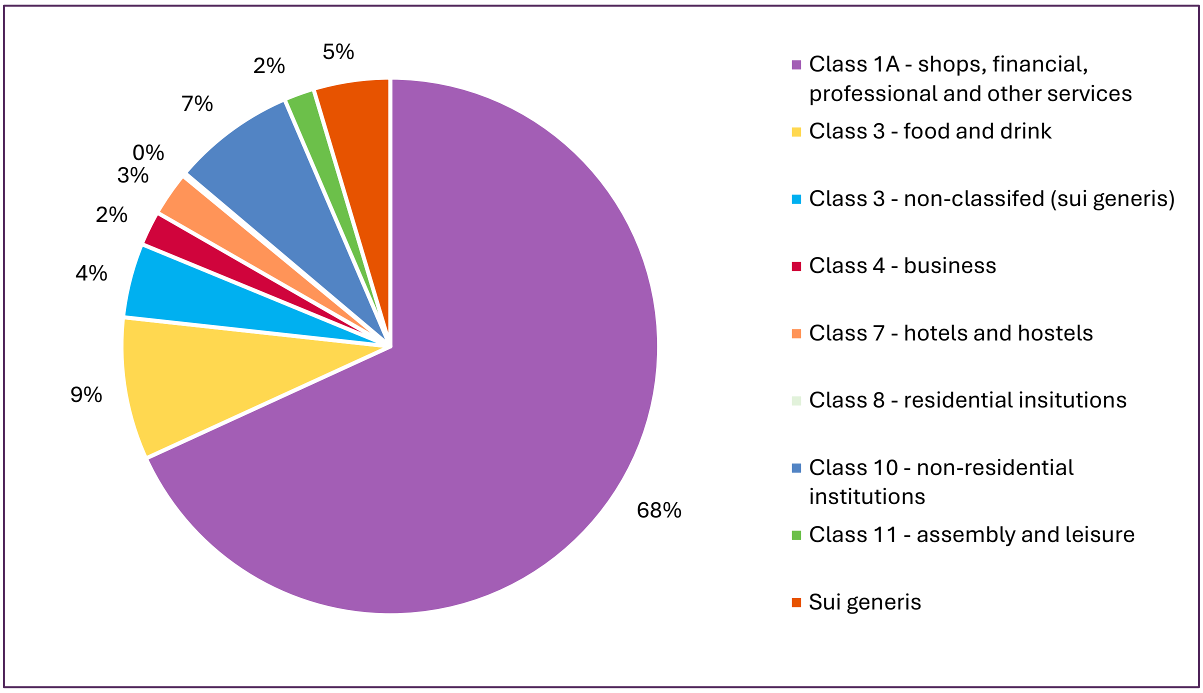


Figure 3 Use class as a percentage of Scottish Borders total number of units

4.6. Charity Shops

4.6.1. As charity shops are normally entitled to 80% mandatory rate relief, they may be viable in circumstances where other businesses are not. On the other hand, the presence of charity shops may be a contributing factor to increase footfall on a high street (although a combination of factors will affect footfall in any given town).

4.6.2. Table 7 lists the towns where charity shops are operating; the number of charity shops operating per town; and the percentage of all retail units and all surveyed units currently operating as a charity shop. There is a total of 32 charity shops across the Borders. The towns with the highest number of charity shops are Galashiels, Hawick, Kelso and Peebles, each with six charity shops. Peebles has the highest percentage of charity shops, both in relation to retail units (7%) and in relation to all units (4%).

Table 7 Percentage of units operating as charity shops

Settlement	Number of charity shops	Total number of retail units	Total number of ALL units	% of retail units charity shops	% of all units charity shops
CHIRNSIDE	0	4	9	0%	0%
COLDSTREAM	1	21	42	5%	2%
DUNS	1	29	66	3%	2%
EARLSTON	0	9	19	0%	0%
EYEMOUTH	1	26	74	4%	1%
GALASHIELS	6	126	252	5%	2%
GALASHIELS 2nd	0	16	47	0%	0%
HAWICK	6	136	285	4%	2%
INNERLEITHEN	1	32	57	3%	2%
JEDBURGH	2	50	100	4%	2%
KELSO	6	102	187	6%	3%
LAUDER	0	10	20	0%	0%
MELROSE	1	47	82	2%	1%
NEWTOWN ST BOSWELLS	0	6	11	0%	0%
PEEBLES	6	86	153	7%	4%
SELKIRK	1	46	100	2%	1%
ST BOSWELLS	0	7	16	0%	0%
TWEEDBANK	0	2	3	0%	0%
WEST LINTON	0	10	16	0%	0%
TOTAL	32	765	1539	4%	2%

5. Town centre health checks

5.1.1. Town centre health checks are undertaken for each settlement to assess town centre vitality. The settlements are scored on a range of criteria relating to accessibility, safety, diversity of uses, and the quality of the built environment. A copy of the checklist can be found in Appendix 3.

5.1.2. Settlements with smaller populations may score well for the quality of the town centre environment but are less likely to receive high scores for accessibility and diversity of uses. Settlements with larger populations have an advantage, in terms of both infrastructure and diversity of uses. The largest towns in the Borders are Hawick and Galashiels. The smallest settlements included in the Retail and Town Centre Survey are Chirnside, Newtown St Boswells and St Boswells. See Table 8 for a breakdown of population figures by settlement.

Table 8 Population by settlement at the 2021 Census

Settlement	Population 2021	Settlement	Population 2021
CHIRNSIDE	1,457	**KELSO**	6,681
COLDSTREAM	1,944	**LAUDER**	1,887
DUNS	2,887	**MELROSE**	1,904
EARLSTON	1,715	**NEWTOWN ST BOSWELLS**	1,465
EYEMOUTH	3,473	**PEEBLES**	8,581
GALASHIELS	12,302	**SELKIRK**	5,458
HAWICK	13,586	**ST BOSWELLS**	1,418
INNERLEITHEN	3,225	**TWEEDBANK**	1,994
JEDBURGH	3,835	**WEST LINTON**	1,851

5.1.3. The average vitality rating across all surveyed settlements is 64%. This is up three percentage points from summer 2024. The settlements ranking highest were Peebles (81%), Lauder (77%), and Innerleithen (76%). The lowest ranking towns were Chirnside (47%), Newtown St Boswells (48%), and Coldstream (54%). Figure 4 shows all surveyed settlements’ scores out of a possible total of 95. Appendix 4 provides the Town Centre Health Checklist template.

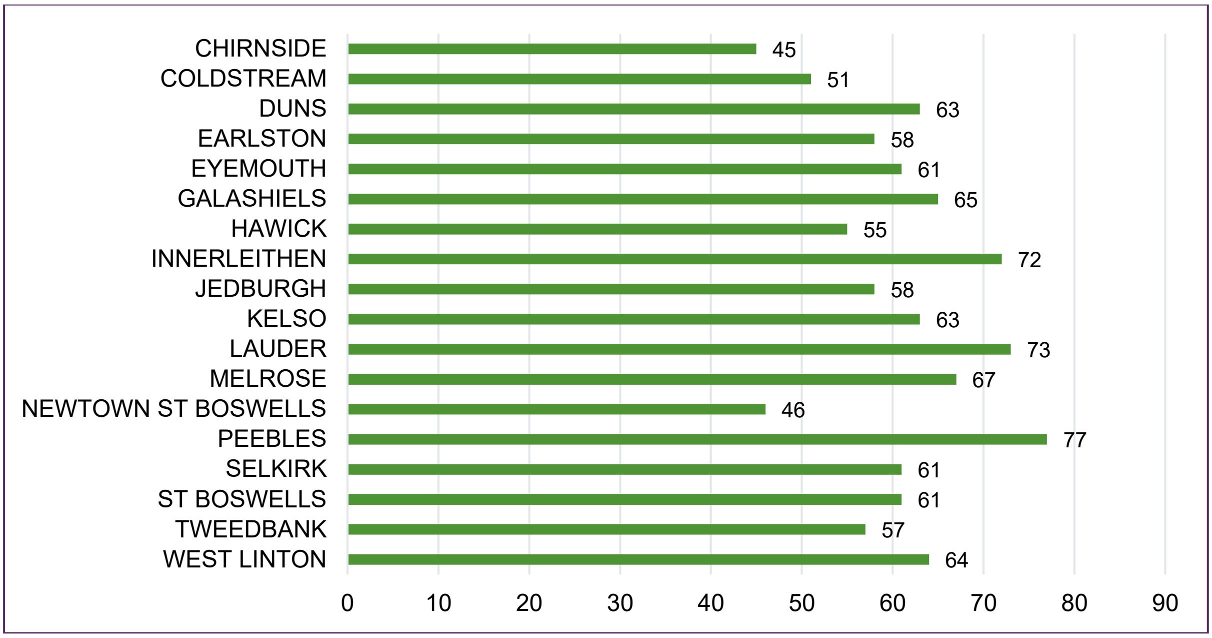


Figure 4 Town centre vitality scores

A1. Appendix 1 – Glossary

Appendix Table 1 Glossary of terms

Additional Units	Units in use classes 4, 8, 10 & 11 included for the first time as part of the summer 2023 survey.
All Units	All units included in the survey from summer 2023 – use classes 1A, 3, 4, 7, 8, 10, 11 and sui generis
Central Retail District	The survey covers a single designated central retail district for each town, except Galashiels where both the town centre and a second centre are monitored.
Core Activity Area	Policy ED4 identifies Core Activity Areas within a number of town centres. In order to support the vitality and viability of Core Activity Areas, acceptable uses are restricted.
Original Units	Units included in the survey prior to the summer 2023 audit – use classes 1, 2, 3, 7 and sui generis.
Retail Units	Refers to units originally in the redundant use class 1.
Town Centre Boundary	Boundaries designated in the Local Development Plan for the nine largest towns.
Units	Generic term for units included in the survey.

A2. Appendix 2 – Retail survey methodology

The Retail and Town Centre Survey covers ground floor town centre units within 18 Borders settlements and has been carried out on a bi-annual basis between 2006 and 2023, and annually since 2024. The process for audit is summarised below.

Appendix Table 2 Survey process

1 Data preparation	Database set up
	Database changes, as necessary
	Identification of survey coverage
	Production of town centre survey maps
2 Survey	Town centre site visits and surveying with town centre maps
	Recording of data
	Recording of new units and unit spatial changes
3 Data update	Database data entry
	GIS spatial changes
	Run database queries
	Results analysis

Database

The database records the following information for each unit:

- Unique unit reference number
- Name of the business (if the unit is occupied)
- Description of the business (e.g. bakery, clothes shop, newsagents)
- Full address
- Use classification
- SBC use categorisation
- Whether the unit is a chain/multiple
- Unit floorspace data
- Whether the unit is within a Core Activity Area.

New fields

New fields have been added to the database over time. These have enabled monitoring to extend to cover specific policy areas such as Core Activity Areas, charity shops, long-term vacancies, and chain/multiples. The coverage of the survey can be extended or reduced going forward in line with new trends and evidence requirements.

Geographic coverage

In 2006, 13 town centres were surveyed. In addition to these, a second centre for Galashiels was introduced in 2006. This was included due to the town's substantial retail and commercial developments outside the town centre. In 2007, this surveying was extended to include all 18 settlements in the Borders with a population greater than 1,000. There have been no additional towns added following the publication of the 2021 census results.

Central retail districts

The survey covers a single designated central retail district for each town, except Galashiels where both the town centre and second centre at Wilderhaugh are monitored. Where the town has a designated town centre boundary in the Local Development Plan, this is used as the central retail district boundary. Where no LDP town centre boundary exists, a central retail district (which has no planning status and is only used for retail survey monitoring purposes) covers the parts of the town where retail units are focussed.

In 2006, three settlements (Tweedbank, Earlston and Coldstream) did not have boundaries identified in the Finalised Local Plan/ Central retail districts were created for these three settlements following site visits. This was repeated in the 2007 survey for the additional five settlements brought into the survey: Chirnside, Lauder, Newtown St Boswells, St Boswells and West Linton.

In 2016, following the adoption of the Council's Local Development Plan, Hawick's town centre boundary was subject to a significant change, which resulted in a notable extension to the town centre. This resulted in 11 new units being monitored through the retail survey. There was also a minor change in the Garfield Street area, which resulted in two units now sitting outside the town centre. Overall, there was a net increase of nine units following these changes. Minor changes were also made to Galashiels town centre boundary, but these did not result in any changes to surveyed units.

A3. Appendix 3 – Description of use classes included in the survey

Appendix Table 3 Description of use classes

USE CLASS	DESCRIPTION
Class 1A Shops and financial, professional and other services	(1) Use — (a) for the retail sale of goods other than hot food, (b) as a post office, (c) for the sale of tickets, (d) as a travel agency, (e) for the sale of cold food for consumption off the premises, (f) for hairdressing, (g) for the direction of funerals, (h) for the display of goods for sale, (i) for the hiring out of domestic or personal goods or articles, (j) as a laundrette or dry cleaners, (k) for the reception of goods to be washed, cleaned or repaired, where the sale, display or service is principally to visiting members of the public. (2) Use for the provision of— (a) financial services, (b) professional services, (c) any other services, which it is appropriate to provide in a shopping area and where the sale, display or service is principally to visiting members of the public. Other examples: supermarket; chemist; auction room; showroom, box office, offices of lawyers, accountants and other professionals (only where there are visiting members of the public); estate agent; health centre; doctors', dentists' or vets' surgery, bank, building society, foreign currency exchange; beautician; nail salon; massage or other therapies;
Class 3 Food and Drink	Use — for the sale of food or drink for consumption on the premises. Examples: Cafés; snack bars; restaurants.
Class 4 Business	Use — (a) as an office, other than a use within paragraph 2 of class 1A (financial, professional and other services); (b) for research and development of products or processes; or (c) for any industrial process; being a use which can be carried on in any residential area without detriment to the amenity of that area by reason of noise, vibration, smell, fumes, smoke, soot, ash, dust or grit. Examples: Corporate office, research laboratory, government office with no visiting members of the public; manufacturing of goods (not within class 5)
Class 7 Hotels and Hostels	Use as a hotel, boarding house, guest house, or hostel where no significant element of care is provided, other than premises where alcohol (within the meaning given by section 2 of the Licensing Scotland Act 2005) is sold, pursuant to a premises licence issued under that Act to persons other than residents or to persons other than persons consuming.

Class 8 Residential Institutions	Use — (a) for the provision of residential accommodation and care to people in need of care other than a use within class 9 (houses); (b) as a hospital or nursing home; or (c) as a residential school, college or training centre. Other examples: hospices, boarding schools, care home.
Class 10 Non-residential Institutions	Use, not including residential use — (a) as a crèche, day nursery or day centre; (b) for the provision of education; (c) for the display of works of art (otherwise than for sale or hire); (d) as a museum; (e) as a public library or public reading room; (f) as a public hall or exhibition hall; or (g) for, or in connection with, public worship or religious instruction, or the social or recreational activities of a (h) as a law court.
Class 11 Assembly and Leisure	Use as — (a) a cinema; (b) a concert hall; (c) a bingo hall or casino; (d) a dance hall or discotheque; or (e) a swimming bath, skating rink, gymnasium or area for other indoor or outdoor sports or recreation, not involving motorised vehicles or firearms. Examples: amusement arcade; amusement park; bowling alley; break-out rooms; casino; children’s soft play; pool or snooker hall.
Sui Generis Uses	Use as/ for – • as an amusement arcade, centre or funfair • a theatre • the sale, or display for the sale of motor vehicles • a taxi business or for the hire of motor vehicles • a scrap yard or yard for the breaking of motor vehicles • the storage or distribution of minerals • as a public house • any work registerable under the Alkali etc. Works Regulations Act 1906 • the sale of hot food for consumption off the premises. • a waste disposal installation for incineration, chemical treatment (as defined in Annex IIA to Directive 75/442/EEC under heading D9), or landfill of waste to which Directive 91/689/EEC applies • a residential flat • a betting office • a pay day loan shop

A4. Appendix 4 – Town centre health checklist

	Rating 1-5 (1:Poor 5: Excellent)				
Town Centre: Officer Initials: Date:	**1**	**2**	**3**	**4**	**5**
Quality of town centre environment					
Overall cleanliness of town centre					
Property appearance, condition and maintenance					
Quality/ built heritage of buildings					
Evidence of recent investment by retailers					
Availability and quality of visitor infrastructure - e.g. street furniture, public toilets, payphones, signage					
Accessibility to Tourist Information Centre					
Presence and quality of open space					
Landscaping within the town centre					
Accessibility					
Provision of facilities for cyclists e.g. cycle lanes, cycle storage					
Ease of pedestrian movement e.g. signage, pedestrian crossings, pedestrianised zones					
Ease of movement for the less mobile e.g. lowered kerbs, pavement condition, automatic entrances					
Public Transport - e.g. presence and quality of bus timetables and bus shelters					
Location and quality of car parks, availability of disabled parking bays					
Impact of traffic on the town centre - e.g. traffic calming measures in place					
Safety and security					
Feeling of security - e.g. Presence of CCTV					
Presence of graffiti & vandalism (1= lots/5=none)					
Diversity of uses					
Presence of entertainment/leisure facilities e.g. swimming pool, cinema, bingo					
Presence of cultural and community facilities e.g. libraries, information boards, community halls					
Availability of food & drink facilities					
Additional Notes:					

Appendix Figure 1 Town centre health checklist template