Our Scottish Borders
Your environment

SCOTTISH BORDERS COUNCIL

Retail Survey Summer 2015

Contents

Key findings

- The overall Scottish Borders retail unit vacancy rate decreased by 1% to 11%.

- The average floorspace vacancy rate also decreased by 1%, to 10%.

- The Scottish Borders continues to compare favourably against the UK average retail unit vacancy rate, which remains at 13%. However, the vacancy rate remains higher than the figures of 7-9% recorded prior to the economic downturn.

- Chirnside (30%), Newtown St Boswells (18%), Galashiels (18%), and Galashiels 2nd centre (16%) have the highest retail unit vacancy rates. Chirnside and Newtown St Boswells also have high floorspace vacancy rates but the two Galashiels centres have average levels of vacant floorspace.

- Earlston, St Boswells, West Linton and Tweedbank have no vacant units at all. Melrose and Innerleithen have the next lowest retail unit vacancy rates, at just 4%.

- Since the last survey, retail unit vacancy rates increased substantially in Galashiels second centre (+5%) and Duns (+5%) but decreased to similar degrees in Selkirk (-5%) and Kelso (-4%), and most substantially, in Newtown St Boswells (-7%).

- The average vacancy rate within Prime Retail Frontage areas is 11%, matching the overall retail unit vacancy rate.

- The nine town centres identified within the Proposed Local Development Plan remain the nine leading settlements by floorspace volume and account for 93% of retail unit floorspace.

- Small units are less likely to be vacant than medium or large units, although very large units are almost all occupied (only 1 such unit is vacant).

- Of the 152 vacant units, a majority have been vacant for 12 months or more (62% - down 1% since last survey).

- Of the total 809 units operating as shops (use class 1, excluding sui generis uses), 33 are charity shops, no change since the last audit.

1 Introduction

1.1 This report sets out the results of the Council's bi-annual survey of ground floor town centre units within eighteen Scottish Borders settlements. The study monitors town centre health and is used to inform the Council's town centre and retail planning policies.

1.2 The town centres covered by the study are those with a population of over 1000, namely:

Chirnside	Kelso
Coldstream	Lauder
Duns	Melrose
Earlston	Newtown St Boswells
Eyemouth	Peebles
Galashiels *	Selkirk
Hawick	St Boswells
Innerleithen	Tweedbank
Jedburgh	West Linton

* Two centres are monitored in Galashiels, the town centre, and a second centre at Wilderhaugh.

2 Policy context

2.1 Scottish Planning Policy (SPP) was updated in 2014 and features a renewed emphasis on town centres. SPP features a town centre first policy and a shift to encouraging a flexible mix of footfall generating uses within town centres. The Policy also highlights the importance of broad and robust monitoring of town centres and identifies a Town Centre Health Check—which has been a feature of the Council's retail survey for several years—as a particularly valuable tool.

2.2 At a local level, the Council's Local Development Plan has now undergone examination and will be adopted in the New Year. The Plan sets out a new Core Activity Areas policy to replace the previous ED4—Prime Retail Frontage policy. The new policy encourages development which increases footfall in town centres, and therefore allows class 3 (food and drink) uses, to encourage greater town centre activity.

3 Methodology

3.1 The survey covers the town centre of each of the surveyed settlements. Retail units that fall outwith these areas are not included within the survey. Ground floor units operating within the use classes listed below are monitored. Those found to have changed to other uses since the previous survey are not counted in results.

- Class 1-shops; class 1-non classified (sui generis);
- Class 2-financial, professional and other services;
- Class 3-food and drink; class 3-non classified (sui generis); and
- Class 7-hotels and hostels.

3.2 Town centre retail floorspace vacancy rates are also monitored through the survey process based on information from the Scottish Assessors [see Appendix 2 for full survey methodology]. This data enables a more complete assessment of town centre retail performance than retail unit vacancy rates alone. Whilst some towns may have high retail unit vacancy rates, they may hold lower floorspace vacancy rates, or vice versa. Note that this data covers use class 1 and 2 only (including use class 1—sui generis).

4 Summer 2015 results

4.1 In total, 1434 units were counted and of these, 152 units were found to be vacant. There are 14 fewer vacant units since the winter 2014 survey. This results in an overall Scottish Borders vacancy rate of 11%, down 1% on winter 2014. The Scottish Borders average floorspace vacancy rate also decreased by 1%, to 9%.

4.2 Settlement vacancy rates vary. Several towns, including Galashiels, Newtown St Boswells and Chirnside, have a retail unit vacancy rate of 16% or more. Galashiels and Hawick together account for more than half of all vacant units. No vacant units at all were recorded in Earlston, St Boswells, Tweedbank or West Linton, though these settlements generally have relatively low numbers of retail units compared to most other settlements.

4.4 Table 1 presents the summer 2015 results for the number of units per settlement; the number of vacant units per settlement; floorspace vacancy rate per settlement (units of use class 1 and 2 only); and the retail unit vacancy rates per settlement. Winter 2014 retail vacancy rates per settlement are also provided for comparison.

Table 1: Settlement vacancy rates, ordered by summer 2015 retail unit vacancy rate

Settlement	Number of units	Number of vacant units	Summer 2015 floorspace vacancy rate	Summer 2015 retail unit vacancy rate	*Winter 2014 retail unit vacancy rate*
Chirnside	10	3	47%	**30%**	*27%*
Newtown St Boswells	11	2	19%	**18%**	*25%*
Galashiels	243	43	10%	**18%**	*18%*
Galashiels 2nd	45	7	8%	**16%**	*11%*
Hawick	251	35	12%	**14%**	*16%*
Duns	63	6	3%	**13%**	*8%*
Coldstream	48	6	6%	**12%**	*12%*
Jedburgh	91	10	19%	**11%**	*9%*
Selkirk	91	10	9%	**11%**	*16%*
Lauder	19	2	1%	**11%**	*11%*
Eyemouth	70	5	5%	**7%**	*9%*
Peebles	145	9	6%	**6%**	*7%*
Kelso	165	9	5%	**5%**	*9%*
Innerleithen	51	2	12%	**4%**	*4%*
Melrose	83	3	11%	**4%**	*3%*
Earlston	22	0	0%	**0%**	*0%*
St Boswells	11	0	0%	**0%**	*0%*
Tweedbank	3	0	0%	**0%**	*0%*
West Linton	12	0	0%	**0%**	*0%*
TOTAL	**1434**	**152**	**9%**	**11%**	***12%***

4.4 Since the winter 2014 survey, retail unit vacancy rates increased substantially in Galashiels second centre (+5%) and Duns (+5%) but decreased to similar degrees in Selkirk (-5%) and Kelso (-4%), and most substantially, in Newtown St Boswells (-7%). Retail unit vacancy rates in the remaining settlements were either unchanged or changed by 3% or less.

5.1 Table 2 shows the changes in retail unit vacancy rates over the past five years.

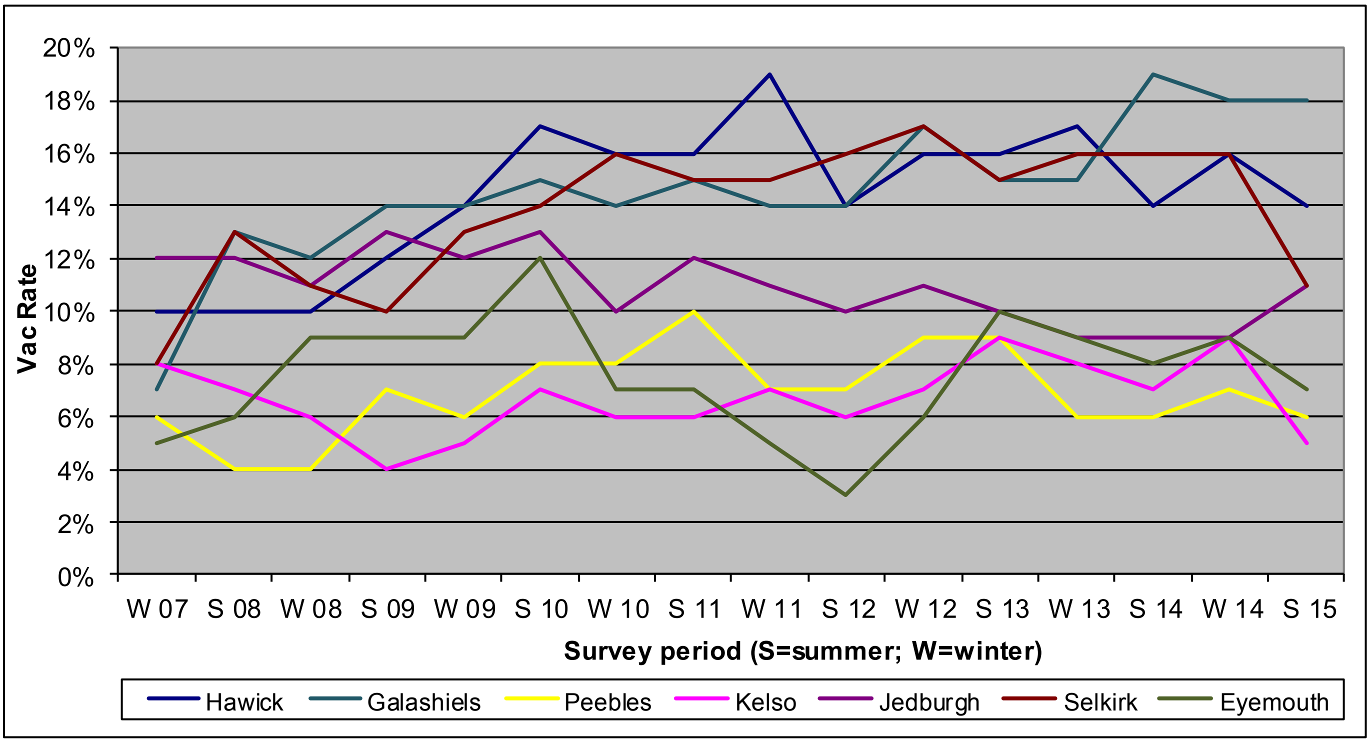
Table 2: Retail unit vacancy rates over past five years

Settlement	W 2010	S 2011	W 2011	S 2012	W 2012	S 2013	W 2013	S 2014	W 2014	S 2015
Chirnside	8%	8%	15%	8%	15%	15%	8%	15%	27%	30%
Coldstream	12%	14%	8%	4%	6%	4%	10%	12%	12%	12%
Duns	14%	14%	14%	14%	9%	9%	8%	8%	8%	13%
Earlston	9%	9%	9%	9%	4%	4%	4%	0%	0%	0%
Eyemouth	7%	7%	5%	3%	6%	10%	9%	8%	9%	7%
Gala 2nd centre	12%	8%	6%	6%	10%	11%	7%	11%	11%	16%
Galashiels	14%	15%	14%	14%	17%	15%	15%	19%	18%	18%
Hawick	16%	16%	19%	14%	16%	16%	17%	14%	16%	14%
Innerleithen	7%	6%	2%	0%	2%	2%	2%	2%	4%	4%
Jedburgh	10%	12%	11%	10%	11%	10%	9%	9%	9%	11%
Kelso	6%	6%	7%	6%	7%	9%	8%	7%	9%	5%
Lauder	0%	0%	5%	5%	0%	5%	5%	5%	11%	11%
Melrose	5%	1%	5%	8%	4%	1%	0%	0%	3%	4%
Newtown St Boswells	8%	8%	8%	8%	17%	17%	17%	25%	25%	18%
Peebles	8%	10%	7%	7%	9%	9%	6%	6%	7%	6%
Selkirk	16%	15%	15%	16%	17%	15%	16%	16%	16%	11%
St Boswells	9%	9%	9%	17%	9%	9%	9%	9%	0%	0%
Tweedbank	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
West Linton	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%

5.2 **Hawick**'s retail unit vacancy rate has fluctuated over the last five years. It is now at its lowest level over this period, 14%, having dropped 2% since the last audit. Hawick's vacancy rate has twice reached lows of 14% before increasing again. The town's floorspace vacancy rate is 12%, which is equal fourth highest in the Borders, with Innerleithen.

5.3 Figure 1 shows the longer term results for the seven largest towns by population. The retail unit vacancy rate in **Galashiels** has more than doubled over this period, from 7% in winter 2007 to 18% now, although its total vacant floorspace rate is only slightly above average, at 10%. There are notable clusters of vacant units at the pedestrianed area of Channel Street and also at the Douglas Bridge area, although the latter area has seen two units being re-occupied on the north side of the street since the last audit. These areas require particular and continued attention going forward. It should also be noted that surveying commenced prior to the opening of the Border Railway. **Galashiels 2nd centre** (Wilderhaugh) saw a significant increase in vacancy rate, from 11% to 16%, although its total vacant floorspace rate increased by just 1 %, to 8%.

Figure 1: Retail unit vacancy rates of seven largest towns, winter 2007 to summer 2015



5.4 **Peebles** has consistently had a lower than average retail unit vacancy rate and its total floorspace vacancy rate (6%) is also lower than average. **Kelso** has also recorded a below average retail unit vacancy rate since the June 2008 survey. Its retail unit vacancy rate decreased from a record high of 9% at the last audit to a six year low of 5%. In **Jedburgh**, the retail unit vacancy rate has remained fairly consistent, never fluctuating higher than 13% or lower than 9%. It is currently 11%. **Selkirk**'s retail unit vacancy rate had been highly variable, increasing from 8% in 2007 to a high of 17% in winter 2012. It had subsequently remained at 15-16% for 24 months, but this survey sees a substantial decrease from 16% to 11%. Finally, **Eyemouth**'s retail unit vacancy rate has continued its general trend of decreasing, from a high over the last five years of 10% in summer 2013, to just 7% now.

5.5 Beyond the seven towns shown in the graph, the retail unit vacancy rate of **Duns** remained at 14% for several successive surveys in the early 2010s before dropping to 8% for three successive surveys. It has now increased to 13%. **Innerleithen**'s retail unit vacancy rate is 4%, but it has a floorspace vacancy rate of 12% (this measure only covers class 1 and class 2 units).

5.6 Also not shown in the graph, **Coldstream**'s retail unit vacancy rate remains 12%, close to its previous highest rate, of 14%. The retail unit vacancy rate in **Earlston** had previously varied been as high as 9%, but is now 0%. **Melrose** and **Lauder** retail unit vacancy rates are 4% and 11% respectively. Table 2 shows significant fluctuations in the retail unit vacancy rates of **Newtown St Boswells**, **St Boswells** and **Chirnside** although these results in part simply reflect the low numbers of retail units in these settlements. This means any change in occupancy of a single unit has a significant effect on a vacancy rate as a percentage. Notably, Chirnside has a very high level of vacant floorspace at 46%. **Tweedbank** is the only settlement where no vacant units have been recorded since monitoring began, although there are only three units in this settlement. There have been no vacant units in **West Linton** since summer 2010.

Comparison to the rest of the UK

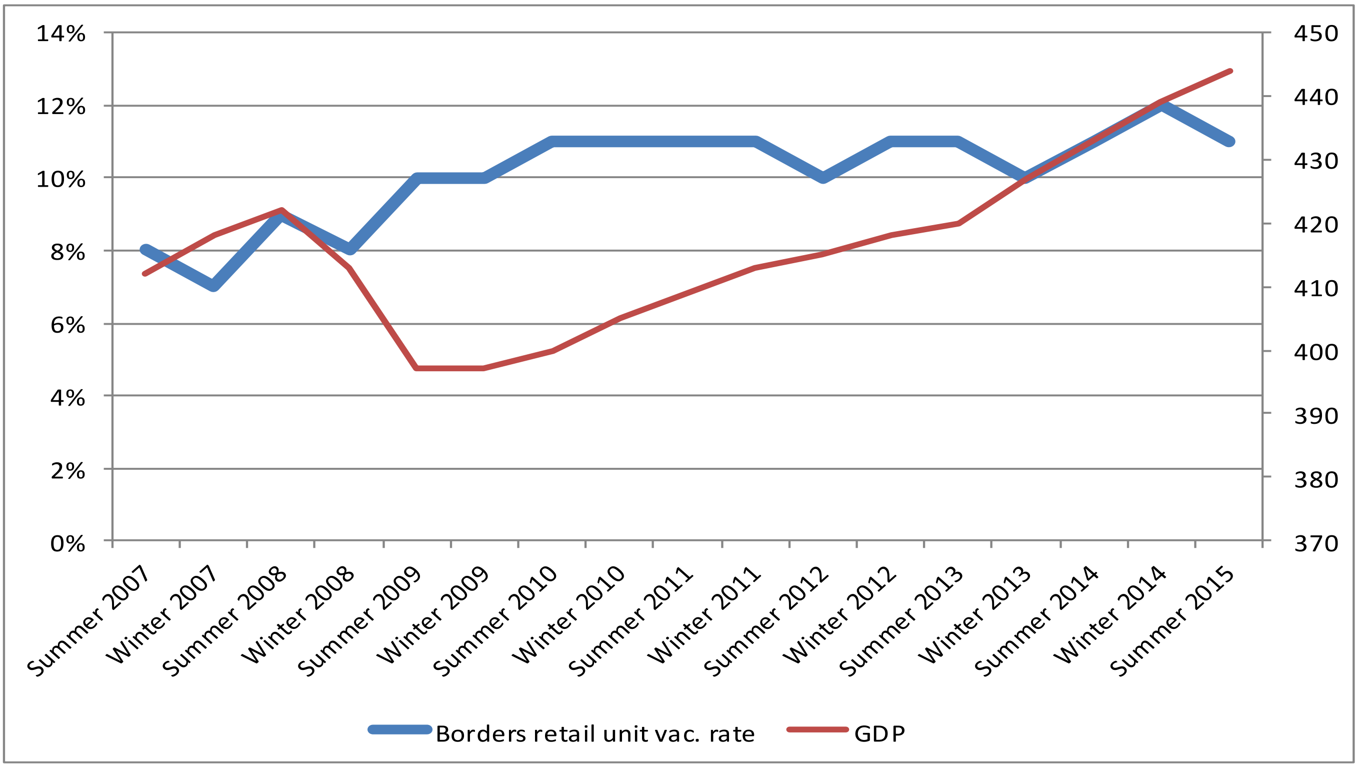
5.7 Table 3 shows the overall Scottish Borders retail unit vacancy rate alongside the UK average retail unit vacancy rate over the last five years [source: Local Data Company]. The table shows that the overall Scottish Borders retail unit vacancy rate has been lower than the UK average for five years. However, the UK average retail unit vacancy rate has decreased from 15% in summer 2012 to 13% now. As a consequence, the gap between UK and Borders vacancy rates has narrowed from a high of 5% in summer 2012 to 2% now.

Table 3: Total nos. of units & vacancy rates [source of UK rates: LDC], (S=summer; W=winter)

	W 2010	S 2011	W 2011	S 2012	W 2012	S 2013	W 2013	S 2014	W 2014	S 2015
Borders retail unit vac. rate	11%	11%	11%	10%	11%	11%	10%	11%	12%	11%
UK vacancy rate	14%	14%	15%	15%	14%	14%	14%	13%	13%	13%
Total no. of units (class 1, 2, 3 or 7)	1445	1448	1445	1446	1450	1440	1435	1440	1436	1434
No. of vacant units	160	160	157	144	159	156	149	153	166	152

5.8 Figure 2 presents time series data in graph form for the overall Scottish Borders retail unit vacancy rate from summer 2007. This is shown against gross domestic product data to illustrate the relationship between retail unit vacancy rates and the state of the wider economy. The graph shows that the vacancy rate increased fairly rapidly in the early recessionary stages of the economic downturn, but has not decreased back to previous levels of 7-9% since, despite subsequent growth in the economy.

Figure 2: Scottish Borders retail unit vacancy rate against GDP, summer 2007 to summer 2015



6 Retail chains

6.1 A prevalence of retail chains can be an indicator of external industry confidence in a town centre and is also monitored through the retail survey. High numbers of local independent shops can also be an indicator of local confidence in a town centre and can be attractive for visitors to a town centre. Table 4 [page 11] lists the number of class 1 units per town centre (shops); the number of class 1 retail chain shops per town centre; and the proportion of class 1 shops which are operated by retail chains. The definition of retail chain shops covers both regional and national chains, and smaller, local, multiple shop chains. The table is presented in order, with settlements with higher proportions of retail chain shops listed first. Sui generis uses are excluded.

6. Overall, 23% of all class 1 shop units are operated by a retail chain. This comes compares to 19% in summer 2007. Of the 187 class 1 chain units recorded in this survey, 31% are located in Galashiels (including Galashiels 2nd centre), 13% in Hawick, 13% in Kelso and 12% in Peebles.

Table 4: Number and proportion of shops (use class 1) which are retail chains, summer 2015

Settlement	Shops (total class 1)	Shops (retail chain only)	Proportion of shops as retail chains
Galashiels 2nd	18	9	50%
Tweedbank	2	1	50%
Earlston	11	4	36%
Galashiels	136	49	36%
West Linton	10	3	30%
Duns	33	9	27%
St Boswells	8	2	25%
Kelso	101	24	24%
Peebles	94	22	23%
Coldstream	27	6	22%
Chirnside	5	1	20%
Jedburgh	48	9	19%
Hawick	137	25	18%
Selkirk	51	9	18%
Newtown St Boswells	6	1	17%
Eyemouth	25	4	16%
Melrose	53	6	11%
Lauder	12	1	8%
Innerleithen	32	2	6%
TOTAL	**809**	**187**	**23%**

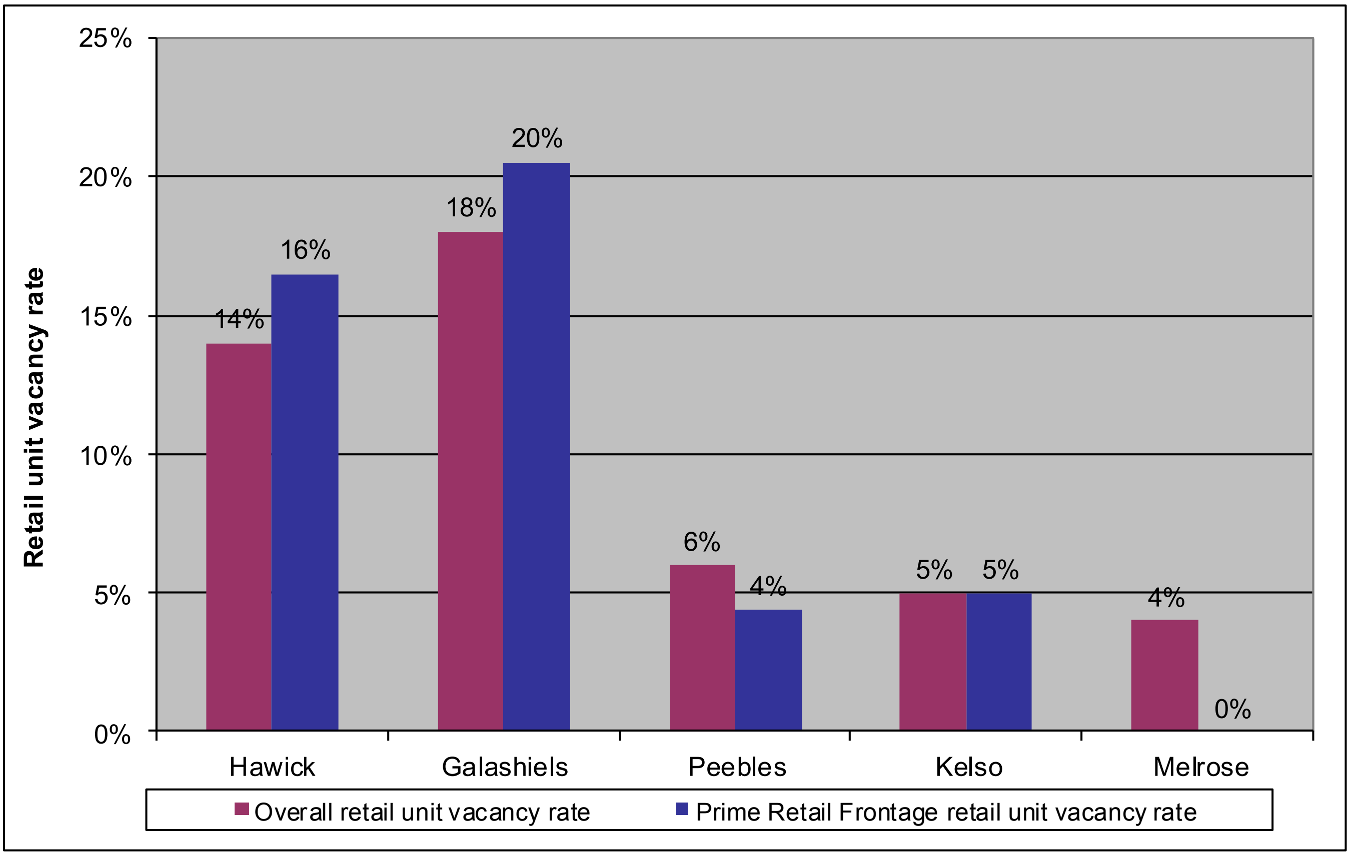
7 Prime retail frontages

7.1 Local Plan policy ED4—Prime Retail Frontages sought to prevent the loss of class 1 shop uses by protecting existing shops within five Prime Retail Frontage areas. The policy is being replaced by the Local Development Plan's Core Activity Areas policy, which covers more compact areas in a total of nine town centres, including the five towns previously covered by policy ED4. This survey assesses Local Plan policy ED4 as that policy was in effect when the survey was undertaken.

7.2 The average retail unit vacancy rate for units within Prime Retail Frontage Areas is 11% - down 2% since the last survey. The retail unit vacancy rate within Prime Retail Frontage areas now matches the overall Scottish Borders vacancy rate, but as with the Borders average, this does not reflect wide variations amongst the towns surveyed.

7.3 Figure 3 shows the overall retail unit vacancy rates of the five settlements where the policy took effect, and compares them against the retail unit vacancy rates within the Prime Retail Frontage areas. The Prime Retail Frontage areas within Melrose and Peebles have a lower vacancy rate than their respective town centres as a whole. The Prime Retail Frontage areas within Hawick and Galashiels have higher vacancy rates than their town centres as a whole.

Figure 3: Prime Retail Frontage vacancy rates against retail unit vacancy rates, summer 2015



8 Use classes

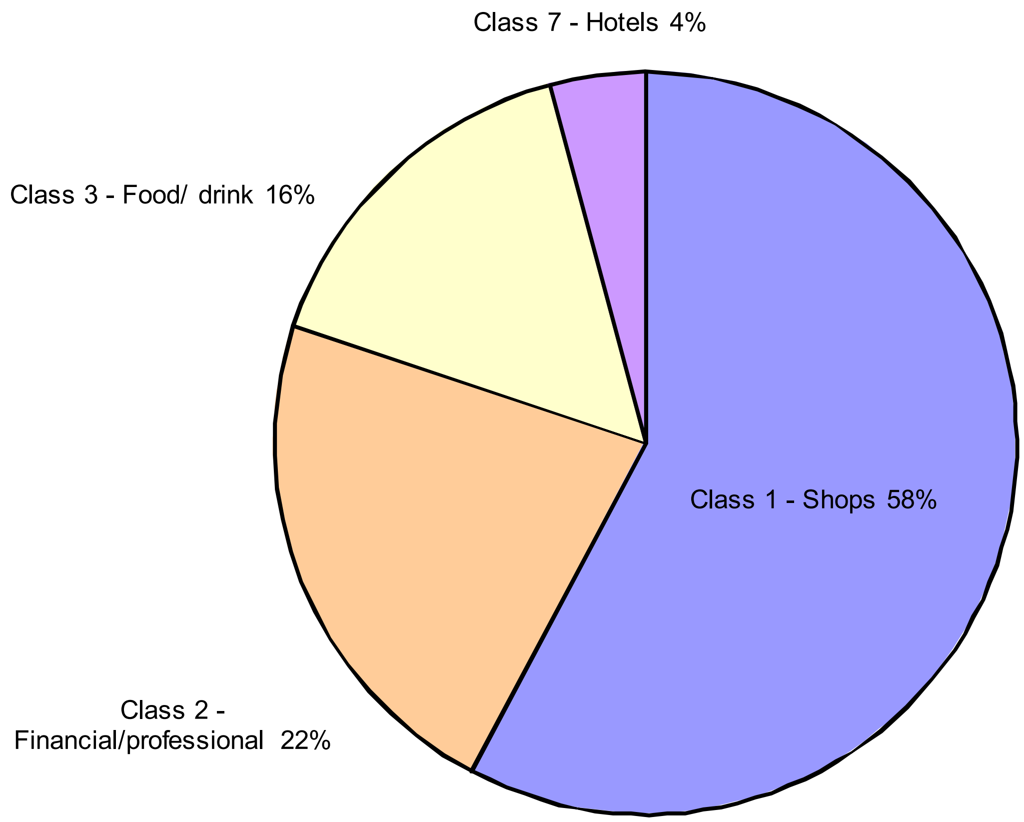
8.1 The retail survey categorises units by their use in planning law (as defined through the Town and Country Planning (Use Classes) (Scotland) Order), and also by the Council's own categorisation system. Only units operating within the following use class categories are monitored through the survey:

- Class 1-Shops and class 1-non classified (sui generis);
- Class 2-Financial, professional and other services;
- Class 3-Food and drink, and class 3-non classified (sui generis); and
- Class 7-Hotels and hostels

8.2 These categories are explained in further detail in Appendix 2. By categorising the retail 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.

8.3 A total of 809 surveyed units in the Borders operate as shops (use class 1 excluding sui generis uses), this is down 17 since the last audit. Figure 4 shows the mix of uses across all of the town centres, and shows that the majority of units (58%) operate as shops (use class 1 including sui generis uses).

Figure 4: Mix of uses across all surveyed town centres, summer 2015



9 Floorspace

9.1 Floorspace data from the Scottish Assessors is also now monitored through the retail survey. This data is only available for class 1 (including Sui Generis use) and class 2 units. Further information on the floorspace data collation process can be found in Appendix 2.

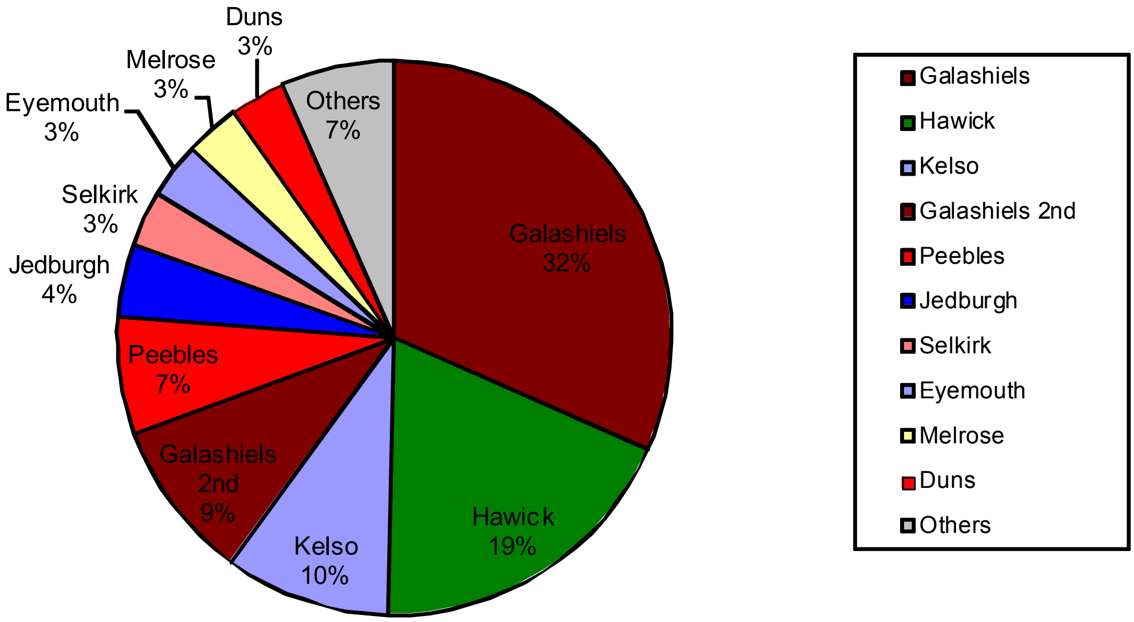
9.2 Table five shows the total number of class 1 (including sui generis) and class 2 units; the total volume of floorspace of these units; the volume of vacant floorspace; and the percentage of total floorspace sitting vacant (the total floorspace vacancy rate). The table is ordered by total floorspace and shows that Galashiels and Hawick have the highest total town centre floorspace. Half of all floorspace within the surveyed town centres is found in Galashiels and Hawick town centres (50%), and over half of all vacant floorspace is found in these town centres (58%).

Table 5: Floorspace data, ordered by total floorspace (figures rounded to nearest 100)

Settlement	Total units (use classes 1 & 2)	Total floorspace	Vacant floorspace	Total floorspace vacancy rate
Galashiels	201	61,400	6100	10%
Hawick	205	36,300	4300	12%
Kelso	133	18,900	900	5%
Galashiels 2nd centre	36	18,300	1400	8%
Peebles	117	13,400	700	6%
Jedburgh	72	8400	1600	19%
Melrose	66	6400	700	11%
Selkirk	73	6400	600	9%
Eyemouth	45	6300	300	5%
Duns	49	6200	200	3%
Coldstream	35	3900	200	6%
Innerleithen	40	2600	300	12%
St Boswells	9	1300	0	0%
Earlston	15	1100	0	0%
Lauder	14	1100	0	1%
Chirnside	6	1000	500	46%
Newtown St Boswells	10	900	200	19%
West Linton	11	700	0	0%
Tweedbank	2	200	0	0%
TOTAL	**1139**	**194,800**	**18,000**	**9%**

9.3 The findings show Galashiels, Hawick, Kelso, Peebles, Jedburgh, Selkirk, Eyemouth, Melrose and Duns have the highest volumes of floorspace in the Borders, and continue to contribute 93% of the total floorspace of the 18 surveyed settlements, as figure 5 illustrates below.

Figure 5: Location of Town Centre floorspace, summer 2015



9.4 Table 6 analyses data by three floorspace volume categories. A vast majority of vacant and total units are small (<100sq.m) or medium sized (100-250sq.m). Only 1 very large (>1000sq.m) unit is vacant, (former Comet store, Galashiels) giving a floorspace vacancy rate of just 2% for these units, compared to some 16% of medium sized units sit vacant. The percentage of vacant large units (250-1000sq.m) has increased since the last audit and is now significantly higher than other unit sizes.

Table 6: Performance by unit floorspace volume, summer 2015

Floorspace volume	Total units	Total vacant units	Unit vacancy rate	Total floorspace	Vacant floorspace	Floorspace vacancy rate	Breakdown of vacant floorspace
<100	727	79	11%	38,000	4100	11%	23%
100-250	286	36	13%	45,400	5500	12%	31%
250-1000	107	19	18%	46,800	7300	16%	41%
>1000	29	1	3%	64,500	1100	2%	6%
Total	**1149**	**135**	**12%**	**194,700**	**18,000**	**9%**	**100%***

* does not add due to rounding

10 Long term vacant units

10.1 The length of time vacant units have been unoccupied can be an indicator of the specific challenges a town centre may be facing. Where a unit is long-term vacant, there may be complex or technical causes of vacancy rather than direct market causes. For example, a unit's use could be prevented by a legal ownership dispute or legislative constraints that cannot be overcome. Long term vacant units may also result from the gradual decline of part of a town centre.

10.2 Of the 152 vacant units, 98 units (64%) have been vacant for 12 months or more, though this number has decreased 5% since the last survey. 32 units (21%) have been vacant for 5 years or longer. 11 of these units are located within Galashiels, 6 in Hawick, and 6 in Selkirk.

11 Charity shops

11.1 Concentrations of charity shops are perceived by some to be an indicator of poor town centre performance. As charity shops are normally entitled to 80% mandatory rate relief, charity shops may be viable in circumstances where other shops are not. Where charity shops are prevalent, there may be factors such as low footfall or consumer expenditure which dissuade other businesses from operating.

11.2 Charity shops are therefore recorded and monitored through the retail survey process. Table 7 lists the towns with charity shops operating; the number of charity shops operating per town; and the percentage of shops operating as charity shops. There are 6 charity shops in Hawick town centre, 5 in Peebles and 5 in Galashiels. In total, there are 33 charity shops within the surveyed town centres, with no change since the last audit. Of a Borders total of 809 class one shops overall, only 4% operate as charity shops.

Table 7: Number of class 1 (shops) units overall, and no. operating as charity shops, summer 2015

Settlement	No. charity shops	No. class 1 units	% charity shops
West Linton	1	10	10%
Jedburgh	4	48	8%
Coldstream	2	27	7%
Duns	2	33	6%
Selkirk	3	51	6%
Peebles	5	94	5%
Hawick	6	137	4%
Eyemouth	1	25	4%
Galashiels	5	136	4%
Kelso	3	101	3%
Melrose	1	53	2%

12 Town Centre Health Checks

12.1 Town Centre Health Checks are conducted 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 used can be found at Appendix 3.

12.2 The average vitality rating across all surveyed settlements is now 66%, which is up 5% from the figure of 61% recorded in 2009. The settlements ranking highest were Peebles (82%), Melrose (78%), Innerleithen and Lauder (both 77%), and the towns which ranked lower were Earlston and Chirnside (both 57%), and Newtown St Boswells (54%).

13 Conclusions

13.1 The overall Scottish Borders retail unit vacancy rate decreased by 1% from the previous record high of 12%, to 11%. The vacancy rate has only been recorded lower than 11% twice in the last eleven surveys—over five years—and has not been lower than 10% since winter 2008. The vacancy rate has therefore returned to its medium or long term norm, which also remains below the overall UK average, of 13%.

13.2 All indicators continue to reinforce the status of Galashiels as a regional retail hub. The town has the highest number of retail chain units; the highest level of floorspace and other research has shown it also has the highest level of town centre footfall. However, the Galashiels retail unit vacancy rate, which remained at 18%, is amongst the highest ever recorded through the retail survey. A cluster of vacant units around the Channel Street and Douglas Bridge area remains of particular concern. The opening of Galashiels Transport Interchange and the Border railway took place shortly after surveying commenced and may produce benefits for these areas as the developments bed in.

13.3 Hawick's retail unit vacancy rate and total floorspace vacancy rate have both shown noteworth improvement, both decreasing by 2% to 14% and 12% respectively. It's retail unit vacancy rate hasn't been lower since winter 2008. Nevertheless, Hawick requires continued attention going forward.

13.4 Future retail and town centre policy will be provided by the Local Development Plan (LDP). The LDP sets out a new Core Activity Areas policy which encourages development which increases footfall in town centres, including class 3 (food and drink) uses. This is a significant policy change and retail surveys will monitor its effect going forward.

Appendix 2: Methodology

The retail survey covers ground floor town centre units within eighteen Borders settlements and has been carried out on a bi-annual basis since winter 2006. The process undertaken is summarised below:

Data preparation:	1 Archive Access database from previous year
	2 Add relevant fields in query/table and form
	3 Identify settlements to survey
	4 Make note of last used 'new map reference number'
	5 Run access report to get relevant records for each settlement
	6 Print maps of towns centres
Survey:	1 Carry out site visits with town centre maps
	2 Note new class 1, 2, 3, or 7 units on map and record details
	3 Record changes to existing units
Data update:	1 Feed findings into database.
	2 Amend spatial records through the GIS
	3 Run access queries to get a range of data outputs
	4 Analyse results and compile report.

Database

The database records the following information for each unit: 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; whether the building is split (e.g. two units within one building); map reference (a unique number which identifies each business spatially); and whether unit is within a Prime Retail Frontage area.

Geographic coverage

In 2006 thirteen towns were surveyed. In 2007 this was increased to include all eighteen settlements in the Borders with a population greater than 1000. There has been no change in these settlements following the publication of census 2011 results. The areas included in the survey correlate with the town centre boundaries as were set out in the Finalised Local Plan. For reasons of consistency, these remain regardless of subsequent town centre boundary changes. In 2006 three settlements (Tweedbank, Earlston and Coldstream) did not have boundaries identified in the Finalised Local Plan. Town centre boundaries 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 addition to the town centres, 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.

New fields since 2006

New fields were added to the database in 2006 to cover use class order classification and chain/ multiple status. For the winter 2010 report, the monitoring of vacancy rates within Prime Retail Frontages areas was introduced, and the winter 2011 report then introduced the monitoring of charity shops, and long term vacant units.

The summer 2013 survey was the first to include data on unit floorspace. This data is primarily based on the Assessor's data for the gross floorspace of each unit. The data collected does not cover use class 3 (food and drink) units or use class 7 (hotels) units. For a small number of units for which no Assessors data was available, the Retail Survey GIS shapefile has been used to establish an estimate of the unit floorspace. A sample of single storey units were examined to establish the relationship between Assessors gross floorspace and unit area as ascertained from the shapefile. A calculation was then made for each of the remaining units using this relationship and other information known about the units (e.g. likely no. floors occupied) to arrive at an estimate for each. Note that the methodology for this dataset differs to that used for the 2011 Retail Capacity Study.

Appendix 3: Use categorisations

Table 1: SBC Categories

SBC Categories	Description
0	Financial, professional and other services
1	Food
2	Drink, confectionary and tobacco
3	Clothing and footwear
4	Furniture, floor coverings and textiles
5	Domestic appliances and electrical
6	Hardware and DIY
7	Other non-food
8	Mixed Business
9	Hire and repair
10	Vacant
11	Charity Shop
X	No longer used for retail

Table 2: Use Class Order categories included in the Survey

Use Class Order	
Class 1—Shops	Retail sale of goods, hairdresser, undertaker, travel and ticket agency, post office. Dry cleaner, laundrette, cold food consumption on premises. Display of goods for sale, hiring out of domestic goods or articles, reception of goods to be washed.
Class1—Non classified (Sui Generis)	Sale or display of motor vehicles. Amusement centre, taxi business, vehicle hire.
Class 2—Financial, professional and other services	Financial, professional and other services, including use as a betting office (which is appropriate to provide in a shopping area, principally for visiting members of the public).
Class 3—Food and drink	Restaurants, café, snack bar (use for sale of food or drink on the premises).
Class 3—Non classified (Sui Generis)	Public House (primary use sales of alcoholic liquor). Hot food takeaway.
Class 7—Hotels and Hostels	Hotel, Guest House or Hostel.

Appendix 4: Vitality checklists

	Rating 1-5 (1:Poor 5: Excellent)				
Town Centre:	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 2: Methodology

The retail survey covers ground floor town centre units within eighteen Borders settlements and has been carried out on a bi-annual basis since winter 2006. The process undertaken is summarised below:

Data preparation:
1 Archive Access database from previous year
2 Add relevant fields in query/table and form
3 Identify settlements to survey
4 Make note of last used 'new map reference number'
5 Run access report to get relevant records for each settlement
6 Print maps of towns centres

Survey:
1 Carry out site visits with town centre maps
2 Note new class 1, 2, 3, or 7 units on map and record details
3 Record changes to existing units

Data update:
1 Feed findings into database.
2 Amend spatial records through the GIS
3 Run access queries to get a range of data outputs
4 Analyse results and compile report.

Database

The database records the following information for each unit: 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; whether the building is split (e.g. two units within one building); map reference (a unique number which identifies each business spatially); and whether unit is within a Prime Retail Frontage area.

Geographic coverage

In 2006 thirteen towns were surveyed. In 2007 this was increased to include all eighteen settlements in the Borders with a population greater than 1000. There has been no change in these settlements following the publication of census 2011 results. The areas included in the survey correlate with the town centre boundaries as were set out in the Finalised Local Plan. For reasons of consistency, these remain regardless of subsequent town centre boundary changes. In 2006 three settlements (Tweedbank, Earlston and Coldstream) did not have boundaries identified in the Finalised Local Plan. Town centre boundaries 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 addition to the town centres, 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.

New fields since 2006

New fields were added to the database in 2006 to cover use class order classification and chain/ multiple status. For the winter 2010 report, the monitoring of vacancy rates within Prime Retail Frontages areas was introduced, and the winter 2011 report then introduced the monitoring of charity shops, and long term vacant units.

The summer 2013 survey was the first to include data on unit floorspace. This data is primarily based on the Assessor's data for the gross floorspace of each unit. The data collected does not cover use class 3 (food and drink) units or use class 7 (hotels) units. For a small number of units for which no Assessors data was available, the Retail Survey GIS shapefile has been used to establish an estimate of the unit floorspace. A sample of single storey units were examined to establish the relationship between Assessors gross floorspace and unit area as ascertained from the shapefile. A calculation was then made for each of the remaining units using this relationship and other information known about the units (e.g. likely no. floors occupied) to arrive at an estimate for each. Note that the methodology for this dataset differs to that used for the 2011 Retail Capacity Study.

Appendix 3: Use categorisations

Table 1: SBC Categories

SBC Categories	Description
0	Financial, professional and other services
1	Food
2	Drink, confectionary and tobacco
3	Clothing and footwear
4	Furniture, floor coverings and textiles
5	Domestic appliances and electrical
6	Hardware and DIY
7	Other non-food
8	Mixed Business
9	Hire and repair
10	Vacant
11	Charity Shop
X	No longer used for retail

Table 2: Use Class Order categories included in the Survey

Use Class Order	
Class 1—Shops	Retail sale of goods, hairdresser, undertaker, travel and ticket agency, post office. Dry cleaner, laundrette, cold food consumption on premises. Display of goods for sale, hiring out of domestic goods or articles, reception of goods to be washed.
Class1—Non classified (Sui Generis)	Sale or display of motor vehicles. Amusement centre, taxi business, vehicle hire.
Class 2—Financial, professional and other services	Financial, professional and other services, including use as a betting office (which is appropriate to provide in a shopping area, principally for visiting members of the public).
Class 3—Food and drink	Restaurants, café, snack bar (use for sale of food or drink on the premises).
Class 3—Non classified (Sui Generis)	Public House (primary use sales of alcoholic liquor). Hot food takeaway.
Class 7—Hotels and Hostels	Hotel, Guest House or Hostel.

3.1 The survey covers the town centre of each of the surveyed

Appendix 4: Vitality checklists

	Rating 1-5 (1:Poor 5: Excellent)				
Town Centre:	**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:					