



**TRANSPORT  
SCOTLAND**  
CÒMHDHAIL ALBA

# **Borders Railway Evaluation**

## **Secondary Data Baseline Report**

# 1 Introduction

## Overview

- 1.1 The reopening of the new Borders Railway is seen as an important contributor to reversing the relative declining performance of the Scottish Borders following the closure of a number of businesses in the traditional sectors in the area.
- 1.2 In particular, the literature supporting the appraisal and business case reveals the rail line is anticipated to have a positive contribution towards achieving:
- the Scottish Government’s Purpose, by increasing the accessibility of Edinburgh and important regional markets for people of Midlothian and the Scottish Borders;
  - the objectives outlined in the Government Economic Strategy, by improving the opportunities for leisure and tourism in the region; and
  - the National Transport Strategy’s objectives, by improving integration, promoting regional cohesion/social inclusion and by helping to promote economic growth.
- 1.3 The Final Business Case (FBC) was prepared to seek approval from the Transport Scotland Investment Decision Making (IDM) Board to invest in the construction of the Borders Railway. The report provides an assessment of the project against four investment objectives as shown in the table below.

Objective / Criteria	Description
Investment Objective 1	Promote accessibility to and from the Scottish Borders and Midlothian to Edinburgh (including the airport) and the central belt.
Investment Objective 2	Foster social inclusion by improving services for those without access to a car.
Investment Objective 3	Prevent decline in the Borders population by securing ready access to Edinburgh’s labour market.
Investment Objective 4	Create a modal shift from the car to public transport.

- 1.4 In line with Transport Scotland’s best practice appraisal and monitoring / evaluation guidance, as set out Scottish Transport Appraisal Guidance (STAG), and its recently published Rail Evaluation Guidance, the impact of the new rail line will be evaluated to assess whether it has met the investment and other wider objectives.
- 1.5 To inform the evaluation, Peter Brett Associates LLP (PBA), together with Streetwise Services, was commissioned by Transport Scotland to develop a baseline of the situation prior to the re-opening of the line in September 2015.

The aim of the research was to provide an overall assessment of the current situation in terms of travel behaviour patterns and the socio economic characteristics of the area prior to the re-opening of the line.

- 1.6 The study involved a primary data collection exercise as well as the collation of secondary data sources. It is anticipated that the information collected via these exercises will then be used to inform the counterfactual for the future evaluation of the new railway.

## **Objectives**

- 1.7 The purpose of this report is to set out details of the potential secondary data which can be used to inform the baseline and subsequent evaluation. The report should be read in conjunction with the Final Report which outlines the results of the primary data collection exercise, which involved:
- An online and telephone survey of households in Midlothian and Scottish Borders;
  - A telephone survey of businesses in Midlothian and Scottish Borders;
  - A panel survey of Edinburgh residents; and
  - A control group survey of residents in East Lothian and Dumfries & Galloway.
- 1.8 The primary research will be used to develop a baseline of the current situation which can then be used to assess the impacts and change associated with the new rail line.
- 1.9 In addition to the primary research, there is significant secondary data which can also be used to supplement the primary research and inform the baseline and subsequent evaluation. The aim of this report is therefore to present the various secondary data sources available.
- 1.10 It should be noted that the purpose of the report is not to provide detailed analysis of the secondary data at this stage but to identify the data sources that could be used when undertaking the evaluation. In addition, while, in undertaking the evaluation it will be important to compare the impacts and trends in the secondary data with the changes in the data / metrics experienced in the control areas, this report is limited to the study area and does not include the recent trends in the data sources for the control groups.
- 1.11 While this report draws together a range of relevant sources and provides a useful reference list for use in the later evaluation, it should also be noted that there is always potential for secondary datasets to be revised and updated and further releases made available. Therefore, it will be necessary to return to the original sources during the later evaluation to ensure that the most up to date datasets are utilised.

## Study Area

- 1.12 Residents in the Scottish Borders and Midlothian are likely to be impacted by the rail line in different ways. To account for this TRACC accessibility planning software was used at the Census Output Area level to determine three distinct geographies ('Tiers') for the purpose of sampling and subsequent analysis. The three geographies identified were as follows:
- Tier 1: areas where walk-in access to the new stations is possible (<15minutes), taking account of the walking network, including off street; footpaths and any new active travel based links to the new stations;
  - Tier 2: excluding Tier 1, areas where reasonable bus-based public transport access is possible (i.e. along bus routes serving the stations) – e.g. within 15 minutes of both an AM and PM peak period; and
  - Tier 3: excluding Tiers 1 and 2, areas where only car-based access to stations is realistic (within 20 minutes), and the new stations will become the closest P&R option for accessing Edinburgh. For example, Penicuik residents would not be expected to use the Borders railway to access Edinburgh, despite being approximately 20 minutes' drive from a station.
- 1.13 An image showing the geographic extent of each of these three tiers is shown in Figure 1.1 below.

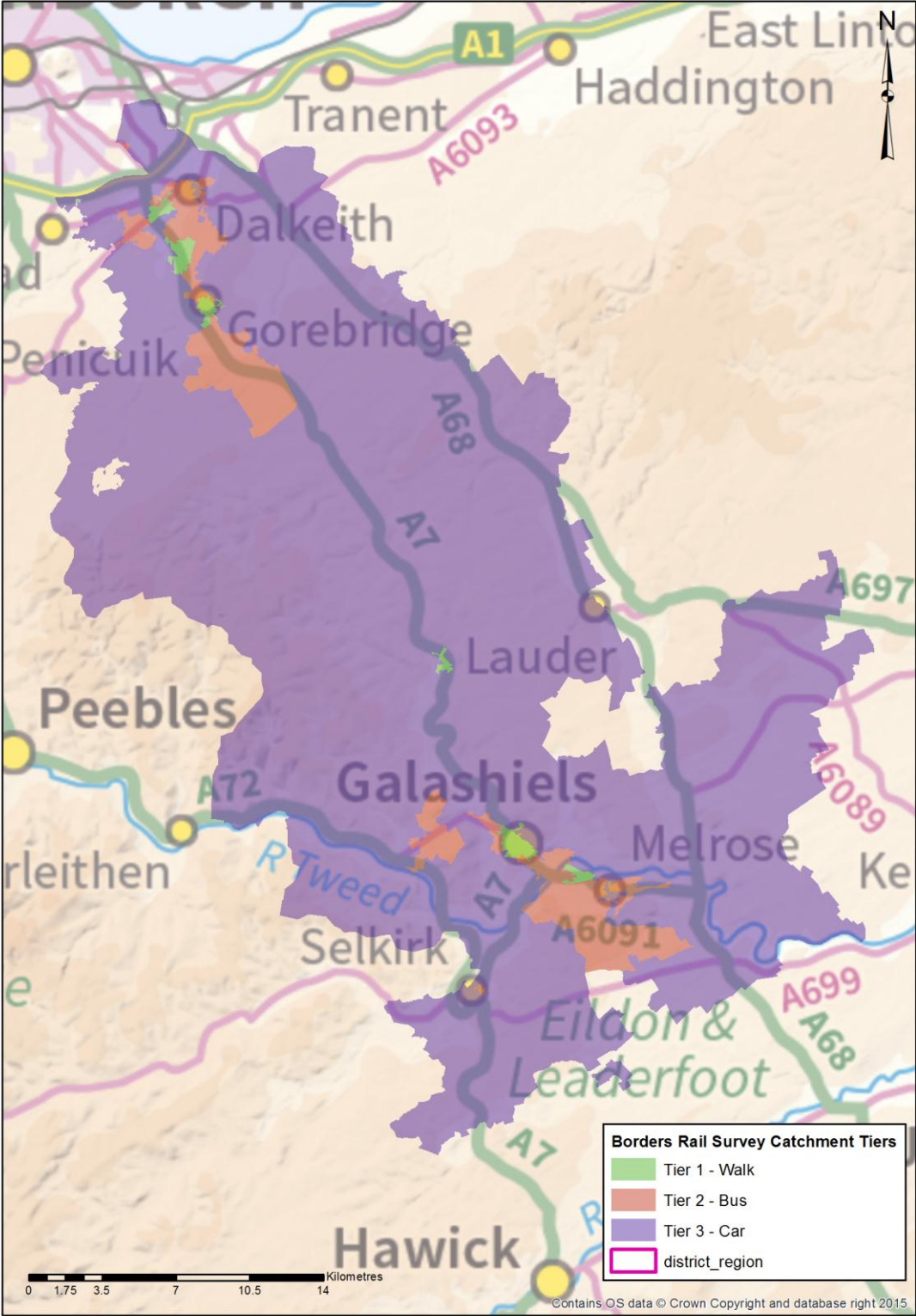


Figure 1.1: Borders Rail Survey Catchment Tiers

Report Structure

1.14 The report is structured as follows:

- Chapter 2: Identifies the key secondary data sources which can potentially be used to inform the baseline and subsequent evaluation. and
- Chapter 3: Considers the existing public transport network and public transport accessibility prior to the re-opening of the line.

## **2 Secondary Data Sources**

### **Overview**

- 2.1 As explained in the introduction, there were a number of objectives associated with the Borders Rail line. To determine whether the investment has achieved those objectives it will be important to analyse the impact against a number of relevant metrics. This chapter identifies the key secondary socio-economic data sources which can be used to inform the baseline and subsequent evaluation of the Borders Railway to assess how it has impacted on the area.
- 2.2 Where available, the secondary data is reported at Census Output Area Level in line with the Tiers outlined above. Where data is not available at this level, data is reported at the data zone or intermediate boundary level and where this is unavailable local authority data for Midlothian and the Scottish Borders is presented. As explained in the introduction, as part of the eventual evaluation the data and trends for Midlothian and Scottish Borders will need to be compared against a control group area. For the primary data collection exercise the control group areas were agreed to be East Lothian and Dumfries & Galloway. The data for these areas, however, is not presented in this report.
- 2.3 The data is drawn from a variety of sources. It is noted that, as is always the case with secondary data, with the exception of the regularly collected datasets (e.g. job seekers allowance claimant rates), there is generally a time lag of one or more years between data collection and publication e.g. the Census (2011), National Register of Scotland Population Estimates (mid 2014), and the Business Register & Employment Survey (2013). This will be an important consideration during the later evaluation of the scheme.
- 2.4 It should also be noted that while many of the impacts of the line will not be evident until after the line has opened, others may occur prior to the line opening such as people moving to the area. The potential of this should also be considered during the evaluation.

### **Local Authority Profiles**

- 2.5 Prior to exploring the data in full, the following provides a brief summary of the socio-economic profile of Scottish Borders and Midlothian. In 2014 the population of the Scottish Borders and Midlothian was 114,130 and 86,210 respectively. Both authorities have a lower proportion of people of working age than that of Scotland as a whole, however, economic activity rates are higher than the Scottish average, with lower rates of unemployment. In terms of occupational profile, in both authorities there is a smaller proportion of employee jobs in professional occupations and financial and insurance industries and a higher number in construction and manufacturing compared to Scotland as a whole.
- 2.6 In terms of transport, as may be expected given the relative public transport provision in each authority car ownership levels are higher in the Scottish Borders than Midlothian. Similarly, while the majority of people who live in Midlothian work in Edinburgh, most people living in the Scottish Borders work

in the Scottish Borders. Driving is the most common travel to work mode in both local authorities, with the proportions choosing to drive higher in the Scottish Borders.

- 2.7 In terms of property, house prices in Midlothian are higher than those in the Scottish Borders and while the number of completions per 1000 Adults (18+) in the Scottish Borders has declined in recent years, Midlothian has seen an overall increase in housing development. Similarly, in terms of business growth, while Midlothian has experienced a growth in the number of active businesses in recent years, the Scottish Borders saw an overall decline between 2009 and 2013.

## Population

### Population by Local Authority

- 2.8 One of the Investment Objectives for the rail line is to prevent decline in the Borders population by securing access to Edinburgh's labour market. It will important therefore to evaluate the changes in population following the introduction of the new service.
- 2.9 The estimated population of the Scottish Borders and Midlothian in 2014 was 114,130 and 86,210 respectively. Table 2.1 shows the population in the Scottish Borders and Midlothian as well as the City of Edinburgh and Scotland between 1981 and 2014 and Table 2.2 shows the annual population growth over the same time period. It is clear from the table that, in recent years, the population in the Borders has grown at a relatively slower rate than in the other areas.

**Table 2.1: Population 1981 – 2014 (Source: National Records of Scotland)**

Year	Scottish Borders	Midlothian	City of Edinburgh	Scotland	Great Britain
1981	101,300	83,600	446,000	5,180,200	54,814,500
1982	101,100	83,100	444,500	5,164,500	54,746,200
1983	101,100	82,200	441,700	5,148,100	54,765,100
1984	101,200	81,700	441,200	5,138,900	54,852,000
1985	101,600	81,000	440,100	5,127,900	54,988,600
1986	101,600	80,400	439,000	5,111,800	55,110,300
1987	101,900	80,200	439,700	5,099,000	55,222,000
1988	102,100	79,900	435,200	5,077,400	55,331,000
1989	102,600	79,300	436,900	5,078,200	55,486,000
1990	103,400	79,600	436,100	5,081,300	55,641,900
1991	103,800	79,500	436,300	5,083,300	55,831,400
1992	104,500	79,100	436,700	5,085,600	55,961,300
1993	105,000	79,000	438,300	5,092,500	56,078,300
1994	105,500	79,100	440,100	5,102,200	56,218,400
1995	105,900	78,900	443,900	5,103,700	56,375,700
1996	105,900	79,000	444,900	5,092,200	56,502,600
1997	106,000	79,600	445,700	5,083,300	56,643,000
1998	106,000	80,100	446,200	5,077,100	56,797,200
1999	105,800	80,600	447,200	5,072,000	57,005,400
2000	106,300	81,100	448,400	5,062,900	57,203,100
2001	107,000	81,000	449,000	5,064,200	57,424,200



2002	107,500	80,900	447,500	5,066,000	57,668,100
2003	108,400	80,300	445,300	5,068,500	57,931,700
2004	109,500	80,200	445,900	5,084,300	58,236,300
2005	110,300	80,100	449,500	5,110,200	58,685,500
2006	110,900	80,000	452,100	5,133,100	59,084,000
2007	112,200	80,400	456,000	5,170,000	59,557,400
2008	113,400	81,500	458,500	5,202,900	60,044,600
2009	113,600	81,900	463,200	5,231,900	60,467,200
2010	113,700	82,400	469,900	5,262,200	60,954,600
2011	113,900	83,500	477,900	5,299,900	61,470,800
2012	113,700	84,200	482,600	5,313,600	61,881,400
2013	113,900	84,700	487,500	5,327,700	62,275,900
2014	114,030	86,210	492,680	5,347,600	62,756,300

**Table 2.2: Population Growth (Source: National Records of Scotland)**

Year	Scottish Borders	Midlothian	City of Edinburgh	Scotland	Great Britain
1981	-	-	-	-	-
1982	-0.20%	-0.60%	-0.34%	-0.30%	-0.12%
1983	0.00%	-1.08%	-0.63%	-0.32%	0.03%
1984	0.10%	-0.61%	-0.11%	-0.18%	0.16%
1985	0.40%	-0.86%	-0.25%	-0.21%	0.25%
1986	0.00%	-0.74%	-0.25%	-0.31%	0.22%
1987	0.30%	-0.25%	0.16%	-0.25%	0.20%
1988	0.20%	-0.37%	-1.02%	-0.42%	0.20%
1989	0.49%	-0.75%	0.39%	0.02%	0.28%
1990	0.78%	0.38%	-0.18%	0.06%	0.28%
1991	0.39%	-0.13%	0.05%	0.04%	0.34%
1992	0.67%	-0.50%	0.09%	0.05%	0.23%
1993	0.48%	-0.13%	0.37%	0.14%	0.21%
1994	0.48%	0.13%	0.41%	0.19%	0.25%
1995	0.38%	-0.25%	0.86%	0.03%	0.28%
1996	0.00%	0.13%	0.23%	-0.23%	0.23%
1997	0.09%	0.76%	0.18%	-0.17%	0.25%
1998	0.00%	0.63%	0.11%	-0.12%	0.27%
1999	-0.19%	0.62%	0.22%	-0.10%	0.37%
2000	0.47%	0.62%	0.27%	-0.18%	0.35%
2001	0.66%	-0.12%	0.13%	0.03%	0.39%
2002	0.47%	-0.12%	-0.33%	0.04%	0.42%
2003	0.84%	-0.74%	-0.49%	0.05%	0.46%
2004	1.01%	-0.12%	0.13%	0.31%	0.53%
2005	0.73%	-0.12%	0.81%	0.51%	0.77%
2006	0.54%	-0.12%	0.58%	0.45%	0.68%
2007	1.17%	0.50%	0.86%	0.72%	0.80%
2008	1.07%	1.37%	0.55%	0.64%	0.82%
2009	0.18%	0.49%	1.03%	0.56%	0.70%
2010	0.09%	0.61%	1.45%	0.58%	0.81%
2011	0.18%	1.33%	1.70%	0.72%	0.85%
2012	-0.18%	0.84%	0.98%	0.26%	0.67%
2013	0.18%	0.59%	1.02%	0.27%	0.64%
2014	0.11%	1.78%	1.06%	0.37%	0.77%

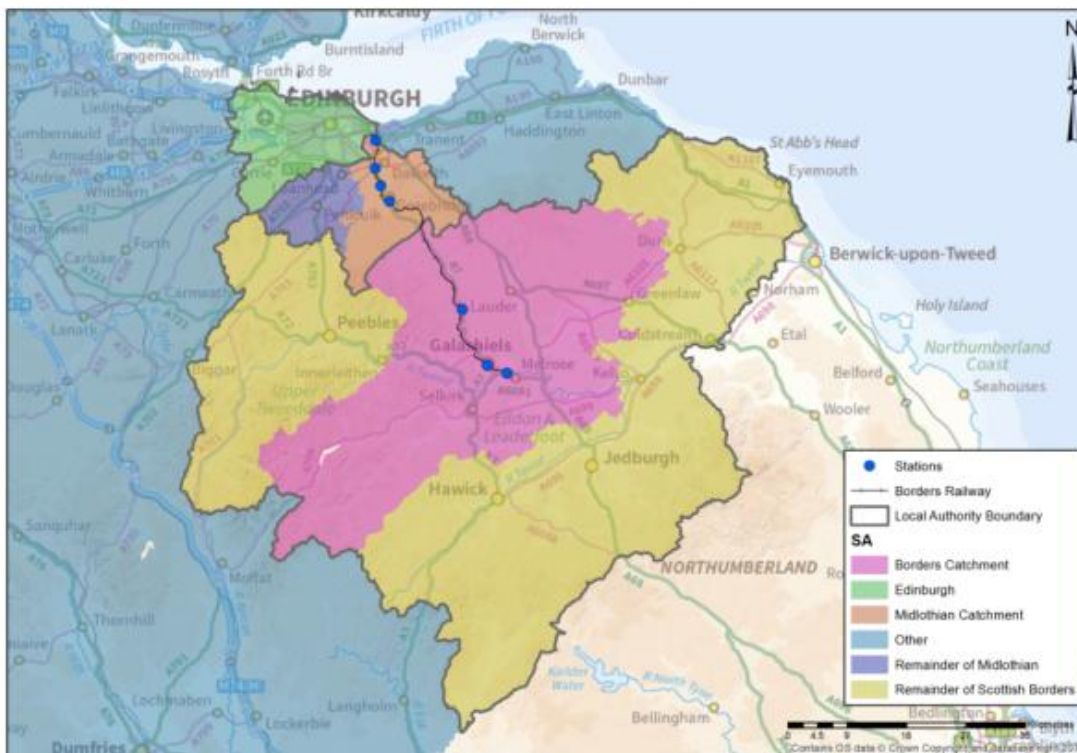
### Population by Tier

2.10 Population data is also available at datazone level. In order to analyse and report this data the study area was divided into a number of distinct areas as follows:

- Borders Catchment – data zones which overlap with the Tiers discussed in Chapter 1 and fall within the Scottish Borders Local Authority boundary;
- Midlothian Catchment – data zones which overlap with the Tiers discussed in Chapter 1 fall within the Midlothian Local Authority boundary;
- Remainder of the Scottish Borders – data zones which fall outside of the areas defined by the Tiers discussed in Chapter 1 but fall within the Scottish Borders Council area;
- Remainder of Midlothian - data zones which fall outside of the areas defined by the Tiers discussed in Chapter 1 but fall within the Midlothian Council area; and
- Edinburgh – data zones falling within the Edinburgh Local Authority boundary.

2.11 The boundaries of these areas are shown in Figure 2.1 below.

**Figure 2.1: Dataszone Boundaries**



2.12 The table below shows the population of each area as defined above between 2009 and 2013. As shown the largest growth in population over this period has occurred in Midlothian catchment.

**Table 2.3: Population Change 2009-2013**

	2009	2010	2011	2012	2013	Change 09-13
Borders Catchment	41,172	41,241	41,278	41,261	41,334	0.4%

Midlothian Catchment	52,597	53,240	53,964	54,662	55,402	5.3%
Edinburgh	463,240	469,940	477,940	482,640	487,500	5.2%
Remainder of Scottish Borders	72,418	72,449	72,602	72,449	72,536	0.2%
Remainder of Midlothian	29,303	29,120	29,486	29,578	29,298	0.0%

### Population by Locality

2.13 Table 2.4 and Table 2.5 show the population of the key localities in the Scottish Borders and Midlothian respectively.

**Table 2.4: Population of Localities in the Scottish Borders Mid 2012 (Source: National Records of Scotland)**

Localities	Population
Hawick	14,050
Galashiels	12,660
Peebles	8,380
Selkirk	5,730
Kelso	5,600
Jedburgh	3,980
Eyemouth	3,430
Innerleithen	3,040
Duns	2,680
Melrose	2,340
Tweedbank	2,100
Coldstream	1,870
Earlston	1,780
Lauder	1,610
West Linton	1,530
Chirside	1,400
Newtown St Boswells	1,330
St Boswells	1,400
Maxwellheugh	1,160
Cardrona	810
Stow	740
Walkerburn	760
Newcastleton	770
Greenlaw	640
Denholm	650
Ayton	560
Yetholm	570
Coldingham	550

**Table 2.5: Population of Localities in Midlothian Mid-2012 (Source: National Records of Scotland)**

Locality	Population
Penicuik	16,110
Bonnyrigg	16,360
Mayfield	13,140
Dalkeith	12,720
Gorebridge	6,330
Loanhead	6,350
Danderhall	2,770

Roslin	1,630
Rosewell	1,540
Bilston	1,210
Pathhead	960

### Age Profile

2.14 Table 2.6 below shows the number and percentage of people aged 16-64 across the study area and the comparison locations. As shown the proportion of people of working age in Midlothian and particularly the Scottish Borders is consistently and significantly lower than that of the City of Edinburgh and typically lower than Scotland in recent years.

**Table 2.6: Number and percentage of people aged 16-64 (Source: NOMIS - ONS)**

Year	Scottish Borders	Midlothian	City of Edinburgh	Scottish Borders (%)	Midlothian (%)	City of Edinburgh (%)	Scotland (%)	Great Britain (%)
1992	65,100	51,700	291,900	62.3%	65.4%	66.8%	64.7%	63.8%
1993	65,800	51,200	297,200	62.7%	64.8%	67.8%	64.7%	63.6%
1994	65,700	51,500	295,400	62.3%	65.1%	67.1%	64.6%	63.5%
1995	65,900	51,200	296,700	62.2%	64.9%	66.8%	64.5%	63.5%
1996	66,400	51,600	300,100	62.7%	65.3%	67.5%	65.0%	63.6%
1997	66,500	51,800	301,400	62.7%	65.1%	67.6%	65.1%	63.6%
1998	66,500	52,200	302,700	62.7%	65.2%	67.8%	65.1%	63.7%
1999	66,300	52,300	304,400	62.7%	64.9%	68.1%	65.1%	63.8%
2000	66,700	52,600	306,200	62.7%	64.9%	68.3%	65.2%	64.0%
2001	66,500	51,800	306,600	62.1%	64.0%	68.3%	64.9%	64.1%
2002	67,000	52,000	306,200	62.3%	64.3%	68.4%	65.0%	64.3%
2003	67,600	51,700	305,200	62.4%	64.4%	68.5%	65.2%	64.4%
2004	68,300	51,800	307,100	62.4%	64.6%	68.9%	65.3%	64.5%
2005	68,700	51,800	311,900	62.3%	64.7%	69.4%	65.5%	64.7%
2006	69,400	51,800	315,000	62.6%	64.8%	69.7%	65.6%	64.9%
2007	70,300	52,200	319,200	62.7%	64.9%	70.0%	65.8%	65.1%
2008	70,800	53,100	321,500	62.4%	65.2%	70.1%	65.8%	65.1%
2009	70,700	53,000	325,000	62.2%	64.7%	70.2%	65.8%	64.9%
2010	70,600	53,100	330,300	62.1%	64.4%	70.3%	65.8%	64.8%
2011	70,600	53,700	336,600	62.0%	64.3%	70.4%	65.8%	64.7%
2012	69,600	53,600	338,300	61.2%	63.7%	70.1%	65.4%	64.2%
2013	69,139	53,495	340,805	60.7%	63.2%	69.9%	65.1%	63.8%
2014	68,629	54,216	343,513	60.2%	62.9%	69.7%	64.9%	63.5%

### **Labour Market**

#### Economic Activity

2.15 It will be important to understand how the rail line has impacted on a number of economic metrics. A useful indicator will be the performance of the labour market. This section identifies a number of labour market metrics that could be used to inform the analysis.

2.16 Table 2.7 and 2.8 show the number and percentage of people who were economically active and the number and percentage of people who were economically inactive across the study area for each quarter between April 2004 and April 2014. The economic activity rate is expressed as the ratio between the number of economically active people and the total number of people aged 16 to 74. As shown economic activity rates have been consistently higher in the Scottish Borders and Midlothian compared to Scotland and Great Britain as a whole.

**Table 2.7: Number and Percentage Economically Active (Source: NOMIS - Annual Population Survey)**

	Scottish Borders	Midlothian	Scottish Borders (%)	Midlothian (%)	Edinburgh (%)	Scotland (%)	Great Britain (%)
Apr 2004-Mar 2005	54,400	42,000	79.9	81.8	79.2	76.8	76.4
Jul 2004-Jun 2005	54,200	41,700	79.8	81.0	77.4	76.7	76.4
Oct 2004-Sep 2005	53,800	42,300	79.4	82.4	78.5	77.0	76.5
Jan 2005-Dec 2005	53,800	41,800	79.7	81.3	78.8	77.1	76.5
Apr 2005-Mar 2006	53,700	42,000	79.7	81.9	78.1	77.1	76.5
Jul 2005-Jun 2006	53,300	42,300	78.8	83.1	79.5	77.3	76.6
Oct 2005-Sep 2006	53,900	42,100	79.5	82.7	78.6	77.2	76.6
Jan 2006-Dec 2006	54,600	42,400	80.3	83.5	79.0	77.8	76.7
Apr 2006-Mar 2007	54,800	42,200	80.5	82.7	79.7	77.9	76.7
Jul 2006-Jun 2007	55,800	41,700	81.5	82.0	78.5	77.9	76.7
Oct 2006-Sep 2007	55,900	42,100	81.3	82.2	78.7	78.0	76.6
Jan 2007-Dec 2007	56,200	42,700	81.1	82.6	78.2	77.6	76.6
Apr 2007-Mar 2008	56,400	43,500	81.1	83.2	76.9	77.6	76.7
Jul 2007-Jun 2008	56,600	43,300	81.1	82.9	78.7	77.7	76.7
Oct 2007-Sep 2008	57,100	43,000	81.4	81.7	78.7	77.8	76.7
Jan 2008-Dec 2008	57,000	42,900	81.4	81.5	78.0	77.4	76.7
Apr 2008-Mar 2009	57,000	42,900	81.3	81.5	79.0	77.5	76.8
Jul 2008-Jun 2009	56,800	42,900	80.7	81.7	78.7	77.4	76.8
Oct 2008-Sep 2009	57,300	43,100	81.5	82.1	78.3	77.5	76.8
Jan 2009-Dec 2009	56,400	43,300	80.7	82.6	77.2	77.4	76.7
Apr 2009-Mar 2010	54,900	42,300	78.6	80.9	75.2	77.0	76.4
Jul 2009-Jun 2010	54,200	42,500	77.5	81.3	73.6	76.9	76.3
Oct 2009-Sep 2010	53,200	42,100	76.1	80.7	73.9	76.9	76.3
Jan 2010-Dec 2010	52,800	41,800	75.5	79.5	74.2	77.0	76.1
Apr 2010-Mar 2011	53,900	42,200	77.0	79.8	75.8	77.1	76.1
Jul 2010-Jun 2011	54,300	42,200	77.7	79.6	76.3	76.9	76.1
Oct 2010-Sep 2011	54,100	42,700	77.5	80.1	77.0	76.8	76.0
Jan 2011-Dec 2011	53,800	42,700	77.4	80.1	76.1	76.9	76.1
Apr 2011-Mar 2012	53,200	42,800	76.7	80.7	75.4	76.7	76.3
Jul 2011-Jun 2012	52,700	43,800	76.2	82.5	75.4	77.0	76.4
Oct 2011-Sep 2012	52,800	42,500	76.7	80.1	74.0	76.9	76.6
Jan 2012-Dec 2012	53,000	41,900	77.3	78.9	76.7	76.8	76.8
Apr 2012-Mar 2013	53,500	41,000	77.9	77.1	77.7	76.7	76.9
Jul 2012-Jun 2013	53,800	40,900	78.4	76.8	77.8	76.5	77.1
Oct 2012-Sep 2013	53,700	40,800	78.2	76.7	78.5	76.6	77.2
Jan 2013-Dec 2013	53,400	40,700	77.9	76.6	76.2	76.9	77.2
Apr 2013-Mar 2014	53,600	41,900	78.5	79.0	76.9	77.1	77.2
Jul 2013-Jun 2014	53,800	41,500	79.0	78.1	76.3	77.4	77.3

Oct 2013-Sep 2014	54,500	42,200	79.7	78.9	76.0	77.4	77.3
Jan 2014-Dec 2014	55,700	43,000	81.1	80.0	76.8	77.5	77.3
Apr 2014-Mar 2015	55,000	42,500	79.9	79.1	76.2	77.8	77.4

**Table 2.8: Number and Percentage Economically Inactive (Source: NOMIS - Annual Population Survey)**

	Scottish Borders	Midlothian	Scottish Borders (%)	Midlothian (%)	Edinburgh (%)	Scotland (%)	Great Britain (%)
Apr 2004-Mar 2005	13,700	9,400	20.1	18.2	20.8	23.2	23.6
Jul 2004-Jun 2005	13,700	9,800	20.2	19.0	22.6	23.3	23.6
Oct 2004-Sep 2005	13,900	9,000	20.6	17.6	21.5	23.0	23.5
Jan 2005-Dec 2005	13,700	9,600	20.3	18.7	21.2	22.9	23.5
Apr 2005-Mar 2006	13,700	9,300	20.3	18.1	21.9	22.9	23.5
Jul 2005-Jun 2006	14,300	8,600	21.2	16.9	20.5	22.7	23.4
Oct 2005-Sep 2006	13,900	8,800	20.5	17.3	21.4	22.8	23.4
Jan 2006-Dec 2006	13,400	8,400	19.7	16.5	21.0	22.2	23.3
Apr 2006-Mar 2007	13,300	8,800	19.5	17.3	20.3	22.1	23.3
Jul 2006-Jun 2007	12,700	9,100	18.5	18.0	21.5	22.1	23.3
Oct 2006-Sep 2007	12,900	9,100	18.7	17.8	21.3	22.0	23.4
Jan 2007-Dec 2007	13,100	9,000	18.9	17.4	21.8	22.4	23.4
Apr 2007-Mar 2008	13,100	8,800	18.9	16.8	23.1	22.4	23.3
Jul 2007-Jun 2008	13,200	8,900	18.9	17.1	21.3	22.3	23.3
Oct 2007-Sep 2008	13,000	9,600	18.6	18.3	21.3	22.2	23.3
Jan 2008-Dec 2008	13,000	9,800	18.6	18.5	22.0	22.6	23.3
Apr 2008-Mar 2009	13,100	9,700	18.7	18.5	21.0	22.5	23.2
Jul 2008-Jun 2009	13,600	9,600	19.3	18.3	21.3	22.6	23.2
Oct 2008-Sep 2009	13,100	9,400	18.5	17.9	21.7	22.5	23.2
Jan 2009-Dec 2009	13,500	9,100	19.3	17.4	22.8	22.6	23.3
Apr 2009-Mar 2010	15,000	10,000	21.4	19.1	24.8	23.0	23.6
Jul 2009-Jun 2010	15,700	9,800	22.5	18.7	26.4	23.1	23.7
Oct 2009-Sep 2010	16,700	10,100	23.9	19.3	26.1	23.1	23.7
Jan 2010-Dec 2010	17,100	10,800	24.5	20.5	25.8	23.0	23.9
Apr 2010-Mar 2011	16,200	10,700	23.0	20.2	24.2	22.9	23.9
Jul 2010-Jun 2011	15,600	10,800	22.3	20.4	23.7	23.1	23.9
Oct 2010-Sep 2011	15,700	10,600	22.5	19.9	23.0	23.2	24.0
Jan 2011-Dec 2011	15,700	10,600	22.6	19.9	23.9	23.1	23.9
Apr 2011-Mar 2012	16,200	10,200	23.3	19.3	24.6	23.3	23.7
Jul 2011-Jun 2012	16,500	9,300	23.8	17.5	24.6	23.0	23.6
Oct 2011-Sep 2012	16,000	10,600	23.3	19.9	26.0	23.1	23.4
Jan 2012-Dec 2012	15,600	11,200	22.7	21.1	23.3	23.2	23.2
Apr 2012-Mar 2013	15,200	12,100	22.1	22.9	22.3	23.3	23.1
Jul 2012-Jun 2013	14,900	12,400	21.6	23.2	22.2	23.5	22.9
Oct 2012-Sep 2013	14,900	12,400	21.8	23.3	21.5	23.4	22.8
Jan 2013-Dec 2013	15,200	12,400	22.1	23.4	23.8	23.1	22.8
Apr 2013-Mar 2014	14,700	11,200	21.5	21.0	23.1	22.9	22.8
Jul 2013-Jun 2014	14,300	11,600	21.0	21.9	23.7	22.6	22.7
Oct 2013-Sep 2014	13,900	11,300	20.3	21.1	24.0	22.6	22.7
Jan 2014-Dec 2014	13,000	10,800	18.9	20.0	23.2	22.5	22.7
Apr 2014-Mar 2015	13,800	11,300	20.1	20.9	23.8	22.2	22.6

2.17 Table 2.9 and 2.10 show the employment rate and the unemployment rate, expressed as the ratio between the number of economically active people and

the total number of people aged 16 to 74, for each quarter between April 2004 and April 2014. Overall, employment rates in the Midlothian and particularly the Scottish Borders are consistently higher than those in Scotland and Great Britain as a whole. Similarly, unemployment rates in the Scottish Borders and Midlothian have been relatively low compared to Scottish and Great Britain averages.

**Table 2.9: Employment Rate (Source: NOMIS - Annual Population Survey)**

	Scottish Borders	Midlothian	Scottish Borders (%)	Midlothian (%)	Edinburgh (%)	Scotland (%)	Great Britain (%)
Apr 2004-Mar 2005	52,600	40,700	77.3	79.2	74.7	72.8	72.7
Jul 2004-Jun 2005	52,100	40,200	76.8	78	72.8	72.6	72.7
Oct 2004-Sep 2005	51,500	40,400	76.1	78.7	74.1	72.7	72.8
Jan 2005-Dec 2005	51,400	39,800	76.2	77.4	75.0	73	72.7
Apr 2005-Mar 2006	51,400	39,700	76.2	77.5	75.1	72.9	72.5
Jul 2005-Jun 2006	51,100	40,000	75.5	78.6	75.9	73.1	72.5
Oct 2005-Sep 2006	52,000	39,800	76.7	78.1	74.9	73.1	72.4
Jan 2006-Dec 2006	52,500	40,100	77.2	78.9	74.9	73.7	72.6
Apr 2006-Mar 2007	52,600	39,900	77.3	78.2	75.2	73.8	72.6
Jul 2006-Jun 2007	53,500	39,300	78.1	77.4	74.6	74	72.6
Oct 2006-Sep 2007	53,700	40,500	78.1	79.1	75.0	74.1	72.6
Jan 2007-Dec 2007	54,600	40,700	78.8	78.7	75.2	73.9	72.5
Apr 2007-Mar 2008	54,900	41,500	79.1	79.4	73.9	74	72.7
Jul 2007-Jun 2008	55,200	41,100	79.1	78.6	75.6	74.3	72.7
Oct 2007-Sep 2008	55,600	40,800	79.4	77.5	75.7	74.3	72.6
Jan 2008-Dec 2008	54,600	41,000	78	77.9	74.5	73.6	72.2
Apr 2008-Mar 2009	54,000	40,500	77.1	76.9	75.4	73.3	72
Jul 2008-Jun 2009	53,300	40,300	75.8	76.7	74.6	72.8	71.5
Oct 2008-Sep 2009	53,200	39,300	75.6	74.8	73.6	72.3	71
Jan 2009-Dec 2009	52,300	39,600	74.9	75.5	72.1	72	70.7
Apr 2009-Mar 2010	51,000	39,100	73.1	74.7	70.1	71.3	70.3
Jul 2009-Jun 2010	50,300	39,200	71.8	75	68.6	71	70.3
Oct 2009-Sep 2010	49,600	39,200	71	75	69.2	71	70.3
Jan 2010-Dec 2010	49,500	38,400	70.8	73	69.8	71	70.2
Apr 2010-Mar 2011	50,700	38,500	72.3	72.7	70.8	71	70.2
Jul 2010-Jun 2011	51,500	38,600	73.7	72.9	71.6	70.9	70.1
Oct 2010-Sep 2011	50,900	39,300	72.9	73.7	72.1	70.5	69.9
Jan 2011-Dec 2011	50,800	39,700	73.1	74.5	71.0	70.5	69.9
Apr 2011-Mar 2012	49,900	40,000	72	75.4	70.9	70.4	70
Jul 2011-Jun 2012	49,500	41,200	71.6	77.4	70.7	70.7	70.1
Oct 2011-Sep 2012	49,800	40,000	72.3	75.4	70.3	70.6	70.4
Jan 2012-Dec 2012	49,800	40,100	72.5	75.4	72.1	70.5	70.6
Apr 2012-Mar 2013	50,500	39,500	73.6	74.3	73.0	70.6	70.8
Jul 2012-Jun 2013	51,100	39,500	74.4	74	72.3	70.4	70.9
Oct 2012-Sep 2013	51,100	39,000	74.4	73.3	72.0	70.5	71
Jan 2013-Dec 2013	51,400	38,400	74.9	72.4	70.7	70.8	71.3
Apr 2013-Mar 2014	51,900	39,200	75.9	73.9	71.6	71.3	71.5
Jul 2013-Jun 2014	52,100	38,800	76.5	73	72.1	71.8	71.9
Oct 2013-Sep 2014	53,200	39,700	77.7	74.3	72.4	72.2	72.2
Jan 2014-Dec 2014	53,800	40,400	78.3	75.1	73.5	72.6	72.4
Apr 2014-Mar 2015	52,900	40,200	76.9	74.8	72.9	72.9	72.7

**Table 2.10: Unemployment Rate (Source: NOMIS -Annual Population Survey)**

	Scottish Borders	Midlothian	Scottish Borders (%)	Midlothian (%)	Edinburgh (5)	Scotland (%)	Great Britain (%)
Apr 2004-Mar 2005	1,800	1,300	3.3	3.2	5.7	5.2	4.8
Jul 2004-Jun 2005	2,100	1,500	3.8	3.7	5.9	5.3	4.8
Oct 2004-Sep 2005	2,300	1,900	4.2	4.5	5.6	5.5	4.8
Jan 2005-Dec 2005	2,400	2,000	4.4	4.8	4.9	5.3	5
Apr 2005-Mar 2006	2,300	2,300	4.3	5.5	3.8	5.4	5.1
Jul 2005-Jun 2006	2,300	2,300	4.2	5.4	4.5	5.5	5.3
Oct 2005-Sep 2006	1,900	2,300	3.6	5.6	4.6	5.3	5.5
Jan 2006-Dec 2006	2,100	2,300	3.8	5.5	5.3	5.2	5.4
Apr 2006-Mar 2007	2,200	2,300	4	5.4	5.7	5.2	5.4
Jul 2006-Jun 2007	2,300	2,300	4.1	5.6	4.9	5.0	5.3
Oct 2006-Sep 2007	2,200	1,600	3.9	3.8	4.7	5.0	5.3
Jan 2007-Dec 2007	1,600	2,000	2.8	4.8	3.8	4.7	5.3
Apr 2007-Mar 2008	1,400	2,000	2.5	4.6	4.0	4.6	5.2
Jul 2007-Jun 2008	1,400	2,200	2.5	5.1	4.0	4.5	5.3
Oct 2007-Sep 2008	1,500	2,200	2.6	5.1	3.8	4.5	5.4
Jan 2008-Dec 2008	2,400	1,900	4.2	4.4	4.5	4.9	5.8
Apr 2008-Mar 2009	3,000	2,400	5.2	5.6	4.5	5.4	6.3
Jul 2008-Jun 2009	3,400	2,600	6.1	6	5.3	6.0	6.9
Oct 2008-Sep 2009	4,100	3,800	7.2	8.9	6.1	6.7	7.5
Jan 2009-Dec 2009	4,100	3,700	7.2	8.5	6.6	7.0	7.8
Apr 2009-Mar 2010	3,900	3,200	7	7.6	6.7	7.4	8
Jul 2009-Jun 2010	4,000	3,300	7.4	7.8	6.8	7.6	7.9
Oct 2009-Sep 2010	3,600	2,900	6.7	7	6.4	7.6	7.8
Jan 2010-Dec 2010	3,300	3,400	6.2	8.2	5.9	7.8	7.8
Apr 2010-Mar 2011	3,200	3,700	6	8.8	6.6	7.9	7.8
Jul 2010-Jun 2011	2,800	3,500	5.1	8.4	6.2	7.9	7.9
Oct 2010-Sep 2011	3,200	3,400	5.9	8	6.3	8.2	8.1
Jan 2011-Dec 2011	3,000	3,000	5.6	7	6.7	8.3	8.2
Apr 2011-Mar 2012	3,200	2,800	6.1	6.5	6.0	8.2	8.3
Jul 2011-Jun 2012	3,200	2,700	6	6.1	6.1	8.2	8.3
Oct 2011-Sep 2012	3,000	2,500	5.8	5.9	5.1	8.1	8.1
Jan 2012-Dec 2012	3,300	1,900	6.2	4.5	6.0	8.1	8.1
Apr 2012-Mar 2013	3,000	1,500	5.5	3.6	6.0	8.0	8
Jul 2012-Jun 2013	2,700	1,500	5	3.6	7.1	8.0	8
Oct 2012-Sep 2013	2,600	1,800	4.9	4.5	8.3	8.0	8
Jan 2013-Dec 2013	2,000	2,200	3.8	5.5	7.2	7.9	7.7
Apr 2013-Mar 2014	1,800	2,700	3.3	6.4	6.9	7.5	7.4
Jul 2013-Jun 2014	1,700	2,700	3.2	6.5	5.4	7.3	7
Oct 2013-Sep 2014	1,400	2,500	2.5	5.9	4.7	6.7	6.7
Jan 2014-Dec 2014	1,900	2,600	3.4	6.1	4.3	6.3	6.4
Apr 2014-Mar 2015	2,100	2,300	3.8	5.4	4.4	6.3	6.1

2.18 Data on economic activity is also included in the Census which is available at Output Area Level. Table 2.11 and 2.12 below compare the economic activity rate using 2011 Census data across the Tiers as defined in Chapter 1. As shown economic activity rates are generally higher in Midlothian and the



Scottish Borders compared to Scotland as a whole, with similar patterns evident across the three Tiers.

**Table 2.11: Economic Activity Rates (Source: Census 2011)**

	Economically active: Total	In employment: Total	Employee: Total	Employee: Part-time (including full-time students)	Employee: Full-time (including full-time students)	Self-employed: Total	Self-employed: Part-time (including full-time students)	Self-employed: Full-time (including full-time students)	Unemployed (including full-time students)
Tier 1	72%	15%	41%	0%	2%	2%	4%	5%	3%
Tier 2	69%	15%	39%	0%	2%	2%	4%	5%	3%
Tier 3	72%	15%	41%	0%	3%	3%	5%	4%	2%
Midlothian	71%	15%	42%	0%	2%	2%	4%	4%	3%
Scottish Borders	70%	15%	36%	1%	3%	3%	6%	4%	2%
Edinburgh	69%	11%	40%	0%	2%	2%	4%	4%	5%
Scotland	69%	13%	40%	0%	2%	2%	4%	5%	4%

**Table 2.12: Economic Inactivity Rates (Source: Census 2011)**

	Economically inactive Total	Retired	Student	Looking after home or family	Long-term sick or disabled	Other
Tier 1	28%	14%	4%	3%	5%	2%
Tier 2	31%	16%	4%	4%	5%	2%
Tier 3	28%	16%	3%	3%	4%	1%
Midlothian	29%	16%	3%	4%	4%	2%
Scottish Borders	30%	19%	4%	3%	4%	2%
Edinburgh	31%	12%	10%	4%	4%	2%
Scotland	31%	15%	6%	4%	5%	2%

### Job Seekers Allowance Claimants

2.19 Table 2.13 shows the number and rate of those who are economically active and claim Jobseeker's Allowance (JSA) and National Insurance credits across the study area as well as Edinburgh, Scotland and Great Britain. As shown

the claimant count in both the Scottish Borders and Midlothian is consistently lower than that in Scotland and Great Britain as a whole.

**Table 2.13: Number and Rate of those who are economically active claiming JSA (Source: NOMIS)<sup>1</sup>**

	Scottish Borders (Number)	Midlothian (Number)	Scottish Borders (Rate)	Midlothian (Rate)	Edinburgh (Rate)	Scotland (Rate)	Great Britain (Rate)
February 2004	1,283	1,081	2.3	2.6	3.2	4.2	3.2
May 2004	1,147	878	2.1	2.1	2.9	3.7	2.9
August 2004	1,092	1,026	2.0	2.4	3.0	3.7	2.8
November 2004	991	921	1.8	2.2	2.8	3.4	2.7
February 2005	1,172	1,076	2.1	2.5	2.9	3.7	2.9
May 2005	1,030	977	1.9	2.3	2.8	3.4	2.9
August 2005	969	962	1.8	2.3	2.8	3.4	2.9
November 2005	944	859	1.7	2.0	2.7	3.2	2.9
February 2006	1,237	1,158	2.2	2.7	2.9	3.6	3.2
May 2006	1,095	1,083	1.9	2.5	2.9	3.4	3.1
August 2006	1,112	1,085	2.0	2.5	3.0	3.5	3.1
November 2006	1,000	936	1.8	2.2	2.7	3.2	3.0
February 2007	1,118	1,023	1.9	2.4	2.7	3.4	3.2
May 2007	885	805	1.5	1.9	2.5	3.0	2.9
August 2007	861	822	1.5	1.9	2.4	2.9	2.8
November 2007	768	754	1.3	1.7	2.1	2.6	2.5
February 2008	911	848	1.6	1.9	2.2	2.9	2.7
May 2008	867	765	1.5	1.7	2.1	2.7	2.7
August 2008	1,081	936	1.8	2.1	2.3	3.1	2.9
November 2008	1,194	1,063	2.0	2.4	2.6	3.4	3.4
February 2009	1,932	1,593	3.3	3.6	3.5	4.5	4.6
May 2009	1,873	1,558	3.2	3.5	3.8	4.7	5.0
August 2009	1,897	1,761	3.3	4.0	4.1	5.0	5.1
November 2009	1,859	1,890	3.2	4.3	4.1	4.9	5.0
February 2010	2,271	2,207	4.2	5.2	4.7	5.5	5.2
May 2010	1,952	1,923	3.6	4.5	4.4	5.0	4.7
August 2010	1,965	1,863	3.6	4.3	4.3	5.2	4.6
November 2010	1,891	1,830	3.5	4.3	4.1	4.9	4.4
February 2011	2,276	2,141	4.1	4.9	4.3	5.5	4.8
May 2011	2,037	1,984	3.7	4.5	4.3	5.2	4.7
August 2011	2,204	2,078	4.0	4.8	4.4	5.5	4.9
November 2011	2,013	2,018	3.6	4.6	4.4	5.1	4.9
February 2012	2,357	2,294	4.2	5.3	4.7	5.6	5.2
May 2012	2,053	2,053	3.7	4.8	4.5	5.3	4.9
August 2012	2,099	2,174	3.8	5.0	4.4	5.4	4.8
November 2012	1,969	2,120	3.5	4.9	4.1	5.0	4.7
February 2013	2,282	2,258	4.1	5.4	4.5	5.4	4.9
May 2013	2,025	1,927	3.6	4.6	4.2	5.0	4.6
August 2013	1,888	1,827	3.4	4.3	3.8	4.8	4.2
November 2013	1,702	1,613	3.0	3.8	3.5	4.0	3.7
February 2014	1,869	1,683	3.2	3.8	3.5	4.2	3.7

<sup>1</sup> Rates from 2013 onwards are calculated using mid-2013 economically active estimates.

May 2014	1,531	1,474	2.6	3.3	3.2	3.7	3.3
August 2014	1,449	1,325	2.4	3.0	2.9	3.4	2.9
November 2014	1,160	1,030	2.0	2.3	2.4	3.0	2.5
February 2015	1,268	1,046	2.1	2.3	2.5	3.2	2.6
May 2015	1,064	907	1.8	2.0	2.0	2.8	2.3
July 2015	952	820	1.6	1.8	1.8	2.8	2.2

2.20 Data on the absolute number of job seeker allowance claimants is also available at datazone level. In order to analyse this data the study area was divided into the areas as defined in section 2.10. The Table below shows the absolute number of job seeker claimants in each area between September 2007 and September 2015.

**Table 2.14: Absolute Number of Job Seeker Allowance Claimants (Source: NOMIS)**

	<b>Borders Catchment</b>	<b>Midlothian Catchment</b>	<b>Edinburgh</b>	<b>Remainder of Scottish Borders</b>	<b>Remainder of Midlothian</b>
September 2007	302	513	5838	468	237
December 2007	319	498	4939	472	250
March 2008	371	563	5437	561	281
June 2008	375	489	5338	505	221
September 2008	425	615	5802	593	300
December 2008	520	796	6907	858	368
March 2009	800	1103	9351	1207	522
June 2009	707	1074	9690	1158	533
September 2009	680	1183	9959	1097	551
December 2009	729	1324	10154	1183	611
March 2010	880	1476	11461	1313	678
June 2010	744	1240	10541	1205	599
September 2010	737	1232	9983	1140	530
December 2010	767	1366	10200	1235	601
March 2011	905	1458	10985	1325	678
June 2011	844	1325	10863	1129	604
September 2011	827	1349	10896	1223	619
December 2011	805	1387	11081	1230	635
March 2012	979	1546	11998	1366	717
June 2012	876	1405	11423	1145	611
September 2012	844	1436	10963	1128	665
December 2012	830	1380	10517	1148	670
March 2013	924	1473	11525	1288	702
June 2013	853	1228	10565	1131	583
September 2013	737	1144	9258	994	536
December 2013	694	1082	8752	1007	510
March 2014	733	1096	8937	1023	517
June 2014	623	920	7880	840	433
September 2014	531	767	6912	743	379
December 2014	429	666	5950	677	296
March 2015	475	694	6173	727	317
June 2015	414	562	4608	542	259
September 2015	349	468	3877	426	219

## Occupation

2.21 Table 2.15 shows the percentage employment in different occupation categories across the study area for the period April 2014-March 2015. Time series data covering the period January 2004 – March 2015 is also available for this dataset. As shown, the Borders and particularly Midlothian are currently less well represented in professional occupations compared with the City of Edinburgh and Scotland as a whole.

**Table 2.15: Occupation (SOC 2010) Major Group of Employment (Source: Annual Population Survey April 2014 – March 2015)**

	Managers, directors and senior officials	Professional occupations	Associate professional and technical occupations	Administrative and secretarial occupations	Skilled trades occupations	Caring, leisure and other service occupations	Sales and customer service occupations	Process, plant and machine operatives	Elementary occupations
Edinburgh	9.2	29.3	14.8	11.1	5.8	7.4	7.9	3.2	11.1
Midlothian	6.9	18.8	13.1	11.8	13.3	11.6	9.6	3.6	10.6
Scottish Borders	12.3	17.3	11.4	6.7	14.7	11.2	6.2	6.6	13.4
Scotland	8.8	19.7	13.0	10.7	11.3	9.8	8.9	6.1	11.3
Great Britain	10.3	19.7	14.1	10.6	10.7	9.2	7.8	6.3	10.9

2.22 Data on occupation categories is also included in the Census which is available at Output Area Level. Table 2.16 below shows the occupation categories across the Tiers as defined in Chapter 1 using Census 2011 data. As shown professional occupations are again less well represented, with similar patterns evident across the three Tiers as defined in Chapter 2.

**Table 2.16: Percentage of people aged 16-74 in employment by Occupation Category and Area (Source Census 2011)**

	Managers, directors and senior officials	Professional occupations	Associate professional and technical occupations	Administrative and secretarial occupations	Skilled trades occupations	Caring, leisure and other service occupations	Sales and customer service occupations	Process, plant and machine operatives	Elementary occupations
Tier 1	9%	15%	12%	12%	13%	11%	10%	7%	11%
Tier 2	8%	14%	11%	13%	14%	12%	10%	8%	12%
Tier 3	9%	15%	11%	12%	15%	11%	8%	7%	11%
Midlothian	8%	14%	12%	13%	14%	12%	9%	7%	11%
Scottish Borders	10%	15%	11%	9%	16%	10%	8%	8%	12%

Edinburgh	10%	26%	15%	12%	7%	8%	8%	4%	11%
Scotland	8%	17%	13%	11%	13%	10%	9%	8%	12%

## Earnings

2.23 Table 2.17 -2.20 below show the median gross weekly and annual pay for full time and part time workers across the study area as well as Edinburgh, Scotland and Great Britain as a whole. As shown pay for full time workers in Midlothian and the Scottish Borders is consistently below that of Edinburgh, Scotland and Great Britain as a whole while those for part time workers is generally above that of Edinburgh and the Scottish and national averages.

**Table 2.17: Median Gross Weekly Pay for Full Time Workers by Residence (Source: NOMIS - Annual Survey of Hours and Earnings)**

2008	450	401	507	463	480
2009	437	424	514	471	491
2010	460	483	524	487	502
2011	453	447	525	487	500
2012	451	450	538	498	508
2013	508	483	562	508	518
2014	490	476	563	518	521
Change 2008-2014	9%	18%	11%	12%	8%

**Table 2.18: Median Gross Weekly Pay for Part Time Workers by Residence (Source: NOMIS - Annual Survey of Hours and Earnings)**

2008	149	171	163	154	148
2009	157	184	160	161	153
2010	162	185	160	159	155
2011	166	162	161	157	154
2012	170	164	151	161	156
2013	173	166	165	166	160
2014	173	198	160	169	162
Change 2008-2014	17%	16%	-2%	10%	10%

**Table 2.19: Median Gross Annual Pay for Full Time Workers by Residence (Source: NOMIS - Annual Survey of Hours and Earnings)**

2008	24,080	21,564	26,639	24,132	25,299
2009	23,292	21,676	27,470	24,946	25,929
2010	24,129	24,210	27,700	25,082	26,000
2011	24,227	22,854	27,573	25,358	26,228
2012	24,124	23,941	28,482	25,907	26,559
2013	25,406	23,839	29,637	26,444	27,123
2014	25,412	25,138	30,006	26,969	27,310
Change 2008-2014	6%	17%	13%	12%	8%

**Table 2.20: Median Gross Annual Pay for Part Time Workers by Residence (Source: NOMIS - Annual Survey of Hours and Earnings)<sup>2</sup>**

2008	8,449	#	8,444	8,562	8,295
2009	8,358	9,937	9,244	8,967	8,655
2010	8,658	9,550	8,891	8,842	8,577
2011	8,850	9,584	9,241	8,799	8,553
2012	9,477	9,112	8,800	9,032	8,652
2013	9,090	#	9,825	9,308	8,902
2014	#	10,020	9,034	9,380	9,022
Change 2008-2014	-	-	7%	10%	9%

2.24 Table 2.21 shows the real growth rates of gross weekly pay in the Scottish Borders, Midlothian, Scotland and Great Britain. In order to determine the real growth rates, the nominal figures were adjusted using Consumer Price Index before calculating real growth.

**Table 2.21: Gross Weekly Pay - All Full Time Workers - Real Growth**

Year	Scottish Borders	Midlothian	City of Edinburgh	Scotland	Great Britain
2002	-	-	-	-	-
2003	2.88%	4.84%	0.95%	1.99%	2.05%
2004	2.24%	6.75%	0.12%	0.95%	2.34%
2005	1.86%	-3.06%	5.32%	2.82%	0.68%
2006	1.88%	8.04%	1.89%	2.07%	0.71%
2007	7.34%	1.15%	1.60%	0.68%	0.80%
2008	2.54%	-7.22%	-1.88%	1.31%	0.69%
2009	-4.80%	3.46%	-0.71%	-0.32%	0.07%
2010	1.75%	10.21%	-1.48%	-0.07%	-1.02%
2011	-5.64%	-11.42%	-3.94%	-4.15%	-4.55%
2012	-3.32%	-2.00%	-0.49%	-0.55%	-1.19%
2013	9.73%	4.90%	1.86%	-0.56%	-0.58%

## Economic Performance and Productivity

2.25 An important objective of the new rail line is to help support and improve the economic performance of the local area and help ensure long-term sustainable economic growth, thus reversing the recently evident decline in a number of industries in the Borders area.

### Employment Structure

2.26 It will also be important as part of the evaluation to understand whether the rail line has had an impact on the profile of industry and businesses and whether there has been a shift to those industries expected to help drive future economic performance.

<sup>2</sup> # These figures are suppressed as statistically unreliable.

2.27 Table 2.22 and 2.23 show the approximate number and percentage of employees by industry in Midlothian and the Scottish Borders as well as the City of Edinburgh and Scotland as a whole.

**Table 2.22: Employees by Industry (Source: BRES 2013)**

	Edinburgh	Midlothian	Scottish Borders	Scotland	Great Britain
1 : Agriculture, forestry & fishing (A)	100	0	400	35,400	193,800
2 : Mining, quarrying & utilities (B,D and E)	2,800	200	400	63,000	348,500
3 : Manufacturing (C)	6,800	2,000	4,900	173,100	2,298,700
4 : Construction (F)	8,300	3,200	2,600	128,100	1,184,700
5 : Motor trades (Part G)	3,500	700	1,100	45,000	474,100
6 : Wholesale (Part G)	6,000	1,200	1,400	69,800	1,094,000
7 : Retail (Part G)	26,300	3,400	4,000	228,600	2,717,800
8 : Transport & storage (inc postal) (H)	10,500	700	800	93,600	1,203,000
9 : Accommodation & food services (I)	27,700	1,500	2,800	182,300	1,897,700
10 : Information & communication (J)	13,800	600	400	62,000	1,087,400
11 : Financial & insurance (K)	34,800	300	400	84,900	1,010,000
12 : Property (L)	4,400	300	700	30,800	456,100
13 : Professional, scientific & technical (M)	28,200	3,400	2,100	159,800	2,141,000
14 : Business administration & support services (N)	24,100	800	1,500	180,200	2,276,400
15 : Public administration & defence (O)	19,000	2,400	2,200	143,300	1,313,100
16 : Education (P)	29,300	3,000	2,800	187,300	2,578,800
17 : Health (Q)	45,200	3,500	8,100	378,200	3,672,000
18 : Arts, entertainment, recreation & other services (R,S,T and U)	16,500	1,200	2,200	112,200	1,229,500
Total	307,500	28,300	38,700	2,357,800	27,176,500

**Table 2.23: Percentage Employee Jobs by Industry (Source: BRES 2013)**

	Edinburgh	Midlothian	Scottish Borders	Scotland	Great Britain
1 : Agriculture, forestry & fishing (A)	0.0%	0.1%	1.1%	1.5%	0.7%
2 : Mining, quarrying & utilities (B,D and E)	0.9%	0.6%	1.1%	2.7%	1.3%
3 : Manufacturing (C)	2.2%	6.9%	12.5%	7.3%	8.5%
4 : Construction (F)	2.7%	11.4%	6.6%	5.4%	4.4%
5 : Motor trades (Part G)	1.1%	2.4%	2.9%	1.9%	1.7%
6 : Wholesale (Part G)	2.0%	4.3%	3.6%	3.0%	4.0%
7 : Retail (Part G)	8.6%	12.1%	10.4%	9.7%	10.0%
8 : Transport & storage (inc postal) (H)	3.4%	2.3%	2.0%	4.0%	4.4%
9 : Accommodation & food services (I)	9.0%	5.4%	7.3%	7.7%	7.0%
10 : Information & communication (J)	4.5%	2.2%	1.1%	2.6%	4.0%

11 : Financial & insurance (K)	11.3%	1.1%	1.0%	3.6%	3.7%
12 : Property (L)	1.4%	0.9%	1.9%	1.3%	1.7%
13 : Professional, scientific & technical (M)	9.2%	12.0%	5.4%	6.8%	7.9%
14 : Business administration & support services (N)	7.8%	2.7%	3.9%	7.6%	8.4%
15 : Public administration & defence (O)	6.2%	8.6%	5.6%	6.1%	4.8%
16 : Education (P)	9.5%	10.4%	7.2%	7.9%	9.5%
17 : Health (Q)	14.7%	12.2%	20.8%	16.0%	13.5%
18 : Arts, entertainment, recreation & other services (R,S,T and U)	5.4%	4.3%	5.6%	4.8%	4.5%

2.28 As shown in Table 2.23 there are higher levels of employee jobs in construction and manufacturing in Midlothian and the Scottish Borders respectively compared to Edinburgh and the Scottish and national averages and lower levels in the financial and insurance industry. There are also slightly lower levels of employment in accommodation and food services particularly in Midlothian compared to the Scottish and Edinburgh averages.

2.29 Data on the number of employees by industry is also available at datazone level. In order to analyse and report this data the study area was divided into the areas as defined in section 2.10. Table 2.24 and 2.25 show the number and percentage of employees by industry across these locations. As shown while the employment structure within each local authority catchment area is similar to that of the counties as a whole there are some slight differences. These include:

- Level of manufacturing in the Borders Catchment (4%) is lower than that for the county as a whole (12.5%)
- Level of construction in the Midlothian Catchment (9%) is lower than that for the county as a whole (11.4%)
- There are lower levels of professional, scientific and technical in the Midlothian Catchment (4%) compared to Midlothian as a whole (12%)



**Table 2.24: Employee Jobs by Industry (Source: BRES 2013)**

	<b>Borders Catchment</b>	<b>Midlothian Catchment</b>	<b>Remainder of Scottish Borders</b>	<b>Remainder of Midlothian</b>	<b>Edinburgh</b>
1 : Agriculture, forestry & fishing (A)	200	0	300	0	100
2 : Mining, quarrying & utilities (B,D and E)	400	100	100	100	2800
3 : Manufacturing (C)	800	1200	4100	800	6800
4 : Construction (F)	1100	1400	1500	1900	8300
5 : Motor trades (Part G)	400	300	700	400	3500
6 : Wholesale (Part G)	600	400	800	900	6000
7 : Retail (Part G)	1700	1300	2300	2200	26300
8 : Transport & storage (inc postal) (H)	300	400	500	200	10500
9 : Accommodation & food services (I)	1000	900	1800	600	27700
10 : Information & communication (J)	200	400	200	200	13800
11 : Financial & insurance (K)	200	200	200	100	34800
12 : Property (L)	400	100	300	100	4500
13 : Professional, scientific & technical (M)	1200	600	900	2800	28200
14 : Business administration & support services (N)	800	400	700	300	24100
15 : Public administration & defence (O)	1700	1800	500	600	19000
16 : Education (P)	1300	1800	1500	1200	29200
17 : Health (Q)	4900	2500	3100	900	45200
18 : Arts, entertainment, recreation & other services (R,S,T and U)	700	800	1500	400	16500
<b>Total</b>	<b>17900</b>	<b>14600</b>	<b>21000</b>	<b>13700</b>	<b>307300</b>

**Table 2.25: Percentage Employee Jobs by Industry (Source: BRES 2013)**

	<b>Borders Catchment</b>	<b>Midlothian Catchment</b>	<b>Remainder of Scottish Borders</b>	<b>Remainder of Midlothian</b>	<b>Edinburgh</b>
1 : Agriculture, forestry & fishing (A)	1%	0%	1%	0%	0%
2 : Mining, quarrying & utilities (B,D and E)	2%	1%	0%	1%	1%
3 : Manufacturing (C)	4%	8%	20%	6%	2%
4 : Construction (F)	6%	9%	7%	14%	3%
5 : Motor trades (Part G)	2%	2%	3%	3%	1%
6 : Wholesale (Part G)	3%	3%	4%	6%	2%
7 : Retail (Part G)	10%	9%	11%	16%	9%
8 : Transport & storage (inc	2%	3%	2%	2%	3%

postal) (H)					
9 : Accommodation & food services (I)	6%	6%	9%	4%	9%
10 : Information & communication (J)	1%	3%	1%	1%	4%
11 : Financial & insurance (K)	1%	1%	1%	1%	11%
12 : Property (L)	2%	1%	2%	1%	1%
13 : Professional, scientific & technical (M)	7%	4%	4%	20%	9%
14 : Business administration & support services (N)	5%	3%	3%	2%	8%
15 : Public administration & defence (O)	10%	12%	2%	5%	6%
16 : Education (P)	7%	12%	7%	9%	10%
17 : Health (Q)	28%	17%	15%	7%	15%
18 : Arts, entertainment, recreation & other services (R,S,T and U)	4%	5%	7%	3%	5%

### Gross Value Added

2.30 Table 2.26 and 2.27 show the Gross Value Added (GVA) per hour worked across the study area. As shown the nominal GDP per hour worked is significantly less in the Borders than East Lothian and Midlothian, the City of Edinburgh, and Scotland as a whole. Additionally, the figure for the Borders is less than that of each NUTS 2 region of Scotland – significantly lower in all instances apart from the Highlands & Islands, where it is only marginally lower (but still consistently lower between 2004 and 2012).

**Table 2.26: Nominal (smoothed) GVA per hour worked (£) (Source: Office for National Statistics Sub Regional Productivity)**

Date	NUTS 3			NUTS 2				NUTS 1
	Borders	East Lothian and Midlothian	City of Edinburgh	Eastern Scotland	South Western Scotland	North Eastern Scotland	Highlands & Islands	Scotland
2004	16.6	21.6	25.5	22.4	21.0	24.7	18.9	21.8
2005	17.0	22.2	26.3	23.1	21.4	25.5	19.1	22.3
2006	17.9	23.3	27.8	24.3	22.2	26.9	19.3	23.3
2007	18.7	24.2	29.5	25.5	23.1	28.5	19.8	24.3
2008	19.5	24.4	30.7	26.3	23.9	29.9	20.4	25.2
2009	19.6	24.0	31.0	26.3	24.2	30.7	20.8	25.4
2010	20.4	24.6	31.8	27.1	25.2	32.2	21.8	26.4
2011	20.7	25.1	32.3	27.7	25.8	33.1	22.4	27.1
2012	20.6	25.1	31.8	27.6	25.7	32.9	22.5	27.0

**Table 2.27: Nominal GVA per Hour Worked (UK=100) (Source: Office for National Statistics Sub Regional Productivity)**

Date	NUTS 3			NUTS 2			
	Borders	East Lothian and Midlothian	City of Edinburgh	Eastern Scotland	South Western Scotland	North Eastern Scotland	Highlands & Islands
2004	73.0	97.7	113.6	99.8	94.0	99.4	82.1
2005	73.3	98.1	114.1	100.1	93.6	100.2	80.7
2006	74.2	98.4	114.9	100.8	92.9	101.8	78.5
2007	74.4	98.2	116.2	101.3	92.8	104.3	77.7
2008	74.9	97.0	117.6	101.7	93.5	107.7	78.4
2009	74.4	95.5	119.7	102.1	94.8	111.5	79.9
2010	74.6	94.0	120.9	102.5	95.9	114.5	80.9
2011	74.4	93.3	121.8	102.8	96.4	116.2	81.2
2012	73.0	97.7	113.6	99.8	94.0	99.4	82.1

### Number of Businesses

- 2.31 Table 2.28 and 2.29 show the total number of active businesses and the number indexed by population in each of the local authority areas between 2009 and 2013. From Table 2.28 we can see that, whilst there has been a 7.5% growth in the number of active businesses in Scotland over this period and a 7% growth in Midlothian, the number of active businesses in the Scottish Borders has declined by 0.7%. In addition, Table 2.29 shows that while the number of active businesses per 10,000 adults has increased between 2009-2013 in both Scotland as a whole and Midlothian (4.7% and 3.2% respectively), the corresponding trend for the Scottish Borders is one of decline (-2%).
- 2.32 Tables 2.30 and 2.31 show the trend in business births over the same time period. It is clear from the tables that the Scottish Borders has performed relatively poorly compared to Scotland as a whole and Midlothian. For example, while business births have grown by 40.9% in Midlothian and 46.3% in Scotland, the corresponding figure for the Scottish Borders is just under 30%.
- 2.33 In terms of the number of business deaths (Table 2.32 and Table 2.33), the Scottish Borders is performing relatively better. While the number of business deaths in each area is declining, the percentage decrease in the Scottish Borders (-15.6%) is higher than in Scotland as a whole (-1.2%) and Midlothian (-2.6%).

**Table 2.28: Active Businesses**

	2009	2010	2011	2012	2013	Change 2009-2013
Scotland	150,925	155,695	155,655	158,320	162,230	7.5%
Scottish Borders	4,115	4,150	4,080	4,060	4,085	-0.7%
Midlothian	2,070	2,100	2,095	2,135	2,215	7.0%
Edinburgh	16,195	16,910	17,115	17,525	18,255	12.7%

**Table 2.29: Number of Active Business per 10,000 Adults (18+)**

	2009	2010	2011	2012	2013	Change 2009-2013
Scotland	361	369	366	370	378	4.7%
Scottish Borders	452	455	444	442	443	-2.0%
Midlothian	322	324	319	322	332	3.2%
Edinburgh	423	434	432	438	452	6.9%

**Table 2.30: Total Business Births**

	2009	2010	2011	2012	2013	Change 2009-2013
Scotland	14,725	15,530	16,940	17,385	21,540	46.3%
Scottish Borders	305	315	315	315	395	29.5%
Midlothian	220	195	200	205	310	40.9%
Edinburgh	1,745	2,070	2,150	2,145	2,730	56.4%

**Table 2.31: Number of Business Births per 10,000 Adults (18+)**

	2009	2010	2011	2012	2013	Change 2009-2013
Scotland	35	37	40	41	50	42.4%
Scottish Borders	34	35	34	34	43	27.9%
Midlothian	34	30	30	31	47	35.9%
Edinburgh	46	53	54	54	68	48.4%

**Table 2.32: Total Business Deaths**

	2009	2010	2011	2012	2013	Change 2009-2013
Scotland	15,085	15,185	13,970	16,550	14,910	-1.2%
Scottish Borders	385	330	300	355	325	-15.6%
Midlothian	190	185	170	205	185	-2.6%
Edinburgh	1,740	1,745	1,600	1,840	1,830	5.2%

**Table 2.33: Number of Business Deaths per 10,000 Adults (18+)**

	2009	2010	2011	2012	2013	Change 2009-2013
Scotland	36	36	33	39	35	-3.8%
Scottish Borders	42	36	33	39	35	-16.6%
Midlothian	30	29	26	31	28	-6.1%
Edinburgh	45	45	40	46	45	-0.25%

## Transport and Travel

### Car Ownership

2.34 Comparing car ownership levels pre and post the scheme will be a metric for Investment Objective 4. Table 2.34 below shows car ownership levels across the study area as recorded in the Census 2011. As shown the proportion of households with no cars or vans is far lower in Midlothian and the Scottish Borders compared to Edinburgh and Scotland as a whole. Overall, there are a higher number of people with no access to a vehicle in Tiers 1 and 2 compared to Tier 3. This may be expected given that Tier 1 and Tier 2 are focused more on the towns whilst Tier 3 is generally more rural in nature.

**Table 2.34: Car Ownership levels**

	No cars or vans	One car or van	Two cars or vans	Three cars or vans	Four or more cars or vans
Tier 1	28%	44%	22%	5%	1%
Tier 2	28%	44%	23%	4%	1%
Tier 3	19%	44%	29%	6%	2%
Midlothian	25%	44%	25%	5%	2%
Scottish Borders	20%	45%	26%	6%	2%
Edinburgh	40%	43%	15%	2%	1%
<b>Scotland</b>	<b>31%</b>	<b>42%</b>	<b>22%</b>	<b>4%</b>	<b>1%</b>

### Travel to Work

2.35 Assessing changes in travel to work patterns across the study area will be particularly important for evaluating the scheme against Investment Objective 2, whilst assessing changes in travel to work modal share will be particularly important for evaluating the scheme against Investment Objectives 3 and 4. A key secondary data source for this will be the Census travel to work data at the intermediate zone level. In order to accurately assess existing travel patterns the study area was divided into a number of distinct areas as follows:

- Borders Catchment – intermediate zones which overlap with the Tiers discussed in Chapter 2 and fall within the Scottish Borders Local Authority boundary;
- Midlothian Catchment – intermediate zones which overlap with the Tiers discussed in Chapter 2 and fall within the Midlothian Local Authority boundary;
- Edinburgh – Intermediate zones falling within the Edinburgh Local Authority boundary; and
- Other – all other locations.

2.36 Table 2.35 and 2.36 show the distribution of travel to work patterns from and to these locations.

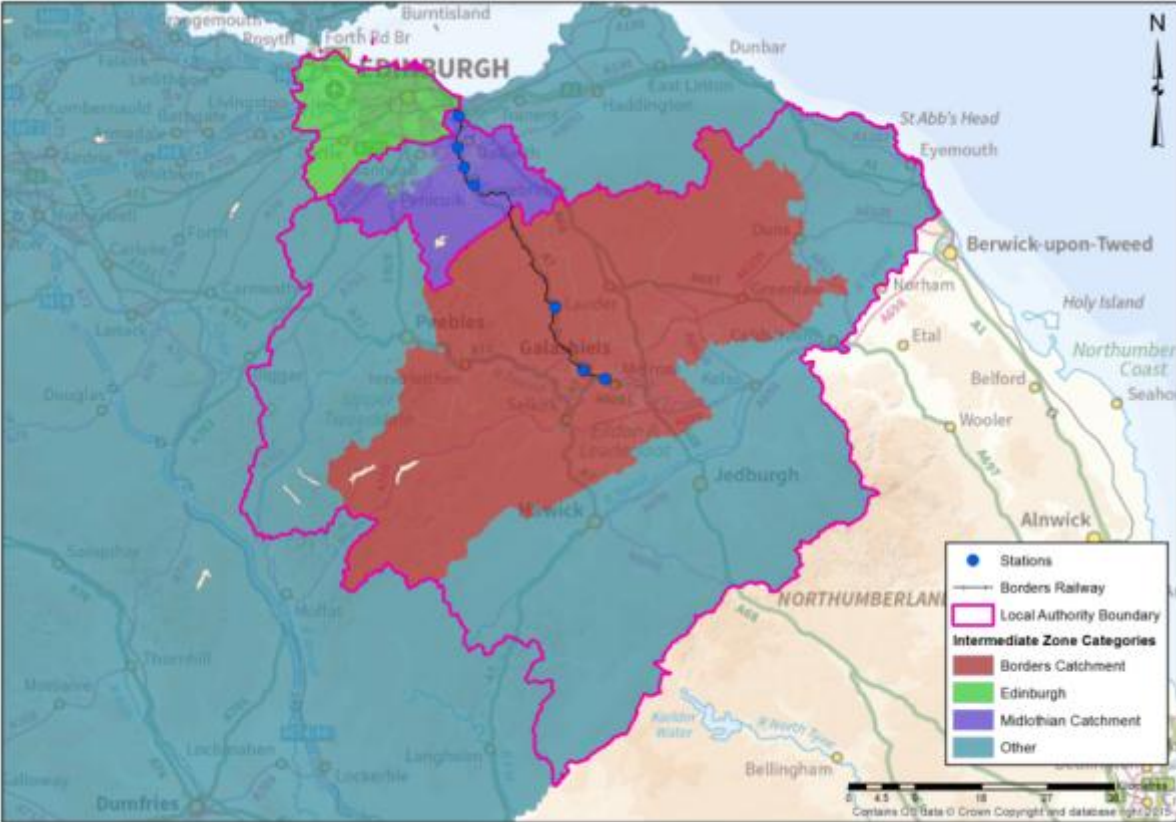


Figure 2.2: Travel to Work Boundaries

**Table 2.35: Distribution of travel to work patterns across study area as percentages of total residents aged 16 and over in employment in each area (origin totals) (Source: Census 2011)**

Destination	Origin					
	Midlothian Catchment	Borders Catchment	Edinburgh	Working at home	No fixed place of work	Other
Midlothian Catchment	23%	0.5%	43%	9%	11%	14%
Borders Catchment	1.4%	49%	8%	15%	11%	16%
Edinburgh	1.0%	0.1%	70%	11%	9%	10%

**Table 2.36: Distribution of travel to work patterns across study area as percentages of total residents aged 16 and over in employment in each area (destination totals) (Source: Census 2011)**

Destination	Origin					
	Midlothian Catchment	Borders Catchment	Edinburgh	Working at home	No fixed place of work	Other
Midlothian Catchment	71%	1%	7%	8%	12%	12.2%
Borders Catchment	4%	96%	1%	11%	10%	11.5%
Edinburgh	25%	3%	92%	81%	78%	76%

2.37 The key points from the above Tables are as follows:

- The majority of people living in the Midlothian catchment (43%) work in Edinburgh
- The majority of people living in the Borders catchment (49%) work in the Borders catchment
- The majority of those working in the Midlothian catchment (71%) live in the Midlothian catchment
- The majority of those working in the Borders catchment (96%) live in the Borders catchment
- 25% of those working in the Midlothian catchment originate in Edinburgh

2.38 Table 2.37 – 2.43 show the proportion using various travel modes for these journeys.

**Table 2.37: Proportion of residents aged 16 and over in employment travelling to work by train (origin totals) (Source: Census 2011)**

Destination Origin	Midlothian Catchment	Borders Catchment	Edinburgh	No fixed place of work	Other
Midlothian Catchment	0.02%	0.00%	0.28%	0.32%	1.89%
Borders Catchment	0.00%	0.01%	0.78%	0.39%	1.75%
Edinburgh	0.09%	0.00%	0.76%	2.49%	12.06%

**Table 2.38: Proportion of residents aged 16 and over in employment travelling to work by bus (origin totals) (Source: Census 2011)**

Destination Origin	Midlothian Catchment	Borders Catchment	Edinburgh	No fixed place of work	Other
Midlothian Catchment	13.9%	1.6%	31.8%	7.6%	6.7%
Borders Catchment	5.3%	5.3%	9.5%	2.6%	4.5%
Edinburgh	16.6%	7.9%	33.6%	20.3%	10.5%

**Table 2.39: Proportion of residents aged 16 and over in employment who drive to work (origin totals) (Source: Census 2011)**

Destination Origin	Midlothian Catchment	Borders Catchment	Edinburgh	No fixed place of work	Other
Midlothian Catchment	55.3%	88.4%	59.7%	76.8%	80.8%
Borders Catchment	87.3%	65.6%	82.5%	82.2%	79.1%
Edinburgh	76.6%	85.3%	32.7%	55.0%	66.7%



**Table 2.40: Proportion of residents aged 16 and over in employment who travel as car passengers (origin totals) (Source: Census 2011)**

Destination Origin	Midlothian Catchment	Borders Catchment	Edinburgh	No fixed place of work	Other
Midlothian Catchment	8.2%	8.5%	5.4%	7.4%	5.2%
Borders Catchment	6.2%	6.3%	5.2%	7.0%	6.8%
Edinburgh	4.2%	3.5%	3.3%	4.5%	4.0%

**Table 2.41: Proportion of residents aged 16 and over in employment who travel by bike (origin totals) (Source: Census 2011)**

Destination Origin	Midlothian Catchment	Borders Catchment	Edinburgh	No fixed place of work	Other
Midlothian Catchment	0.9%	0.0%	1.2%	0.4%	0.7%
Borders Catchment	0.3%	1.9%	0.1%	0.5%	0.8%
Edinburgh	1.2%	1.8%	5.6%	2.6%	1.3%

**Table 2.42: Proportion of residents aged 16 and over in employment who walk to work (origin totals) (Source: Census 2011)**

Destination Origin	Midlothian Catchment	Borders Catchment	Edinburgh	No fixed place of work	Other
Midlothian Catchment	21.0%	0.8%	0.4%	3.6%	1.8%
Borders Catchment	0.3%	20.3%	N/A	4.2%	4.5%
Edinburgh	0.7%	N/A	23.1%	9.6%	1.9%

**Table 2.43: Proportion of residents aged 16 and over in employment who travel to work by ‘other’ mode (origin totals) (Source: Census 2011)**

Destination  Origin	Midlothian Catchment	Borders Catchment	Edinburgh	No fixed place of work	Other
Midlothian Catchment	0.7%	0.8%	1.3%	3.9%	2.9%
Borders Catchment	0.6%	0.7%	1.0%	3.1%	2.6%
Edinburgh	0.5%	0.6%	0.9%	5.4%	3.5%

2.39 The key points from these tables are as follows:

- Driving is the most commonly used travel to work mode for those living in the Borders and Midlothian catchments
- 59.7% of those living in the Midlothian catchment and working in Edinburgh drive to work and 82.5% of those living in the Borders catchment and working in Edinburgh
- 76.6% of those living in Edinburgh and working in Midlothian and 85.3% of those living in Edinburgh and working in the Scottish Borders drive to work

### Traffic Counts

2.40 The Department for Transport (DfT) publish annual average daily flow (AADF) figures for every junction-to-junction link on the 'A' road network on an annual basis. Figure 2.3 -2.7 show the location of the AADF count sites on the A7 corridor in Midlothian and the Scottish Borders and the tables below summarise the average number of motor vehicles per day at each of these sites between 2000 and 2014.

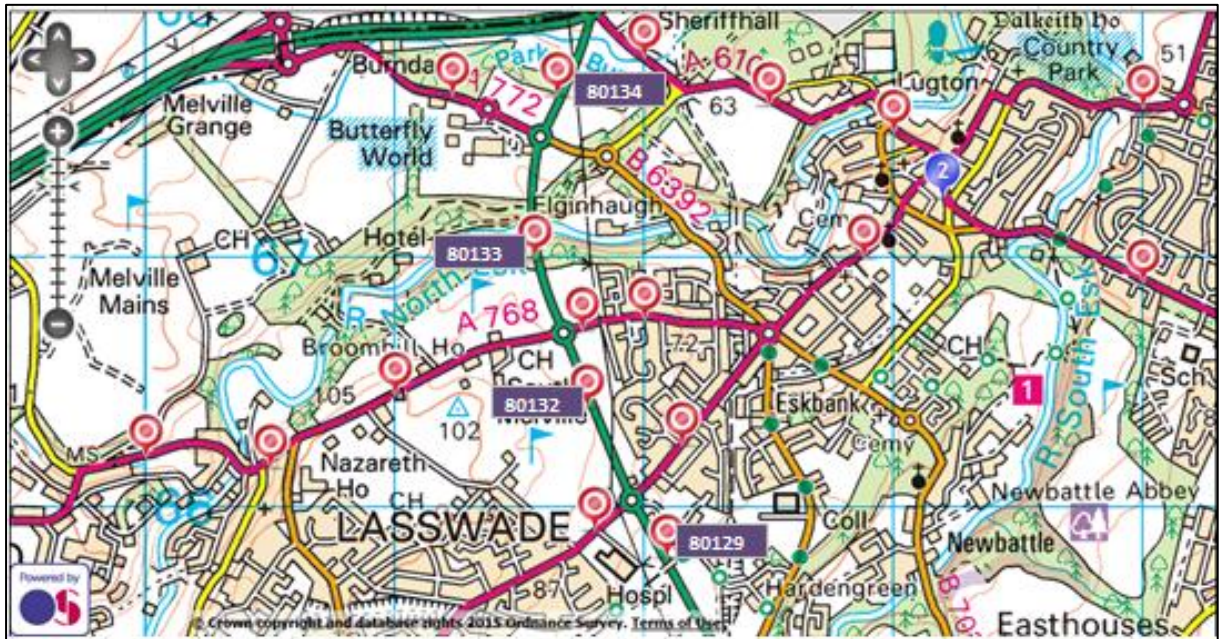


Figure 2.3: AADF Count Locations – Midlothian (Source: DfT)



Figure 2.4: AADF Count Locations – Midlothian (Source: DfT)



Figure 2.5: AADF Count Locations – Scottish Borders (Source: DfT)

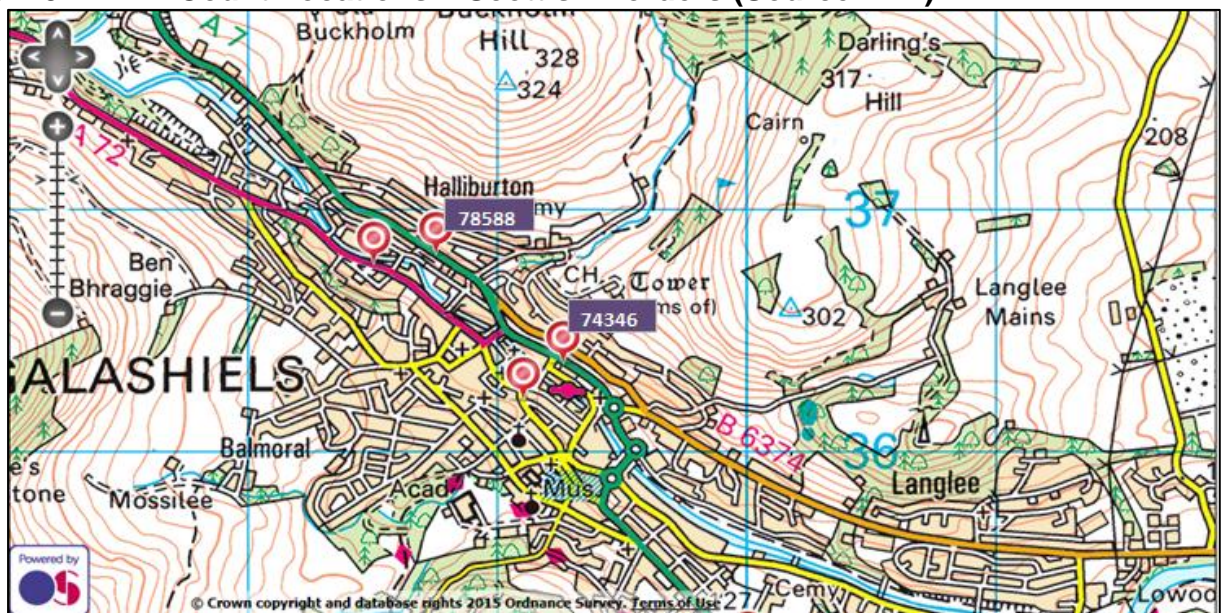


Figure 2.6: AADF Count Locations – Scottish Borders (Source: DfT)

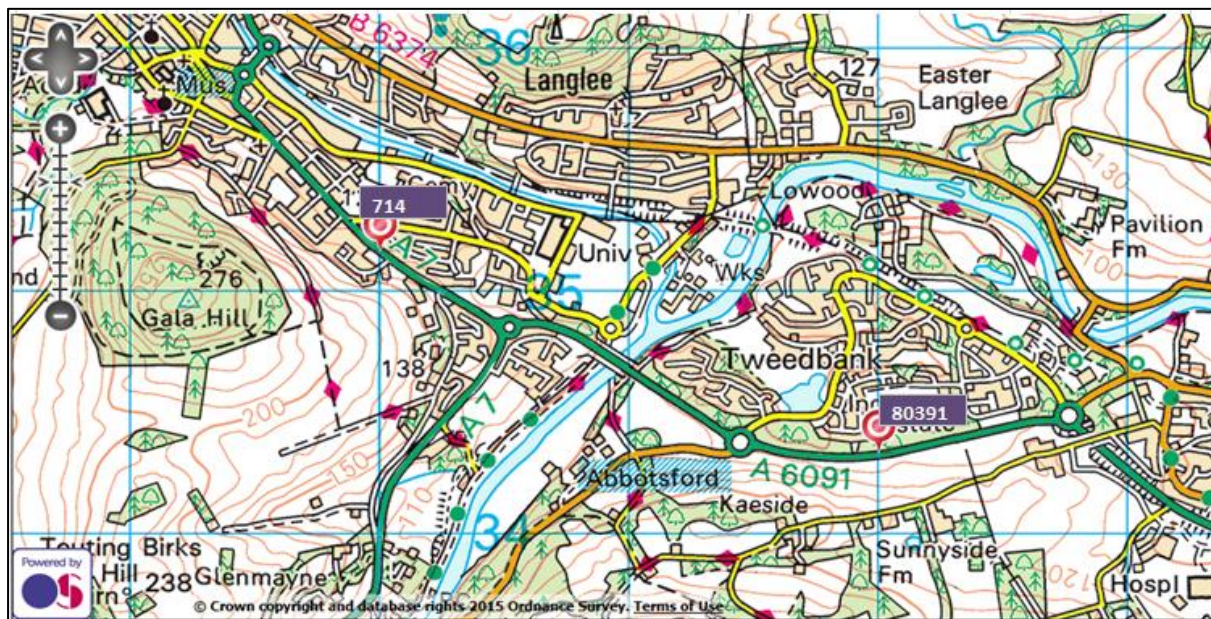


Figure 2.7: AADF Count Locations – Scottish Borders (Source: DfT)

Table 2.44: Average Daily Flow of Motor Vehicles at A9 Count Site – Midlothian (Source: DfT)

	80134	80133	80132	80129	80128	78547	80139	20714
2000	11230	16190	20577	12236	13276	8126	5454	5069
2001	11336	16764	21247	11938	16088	7918	5494	5115
2002	11610	17233	21820	12196	16459	8085	6871	5237
2003	11942	17858	22535	12055	16159	7958	7017	5375
2004	12000	18457	23213	12500	16575	8218	7039	5400
2005	12068	18488	23209	12282	16122	8038	7052	5616
2006	12514	18916	23723	12102	15898	7915	7246	5760
2007	12457	19181	23965	12044	15832	7868	7225	5738
2008	12067	19131	23841	11931	15618	9722	6999	5561
2009	11930	19021	23654	12097	15929	9874	6911	5495
2010	11787	21478	21473	12254	16070	9930	6390	5436
2011	13712	21425	21440	12614	15397	10052	6464	5508
2012	13479	21424	22375	12567	15268	9954	6360	5425
2013	13410	21459	22365	17644	15295	9969	6329	4695
2014	13722	22084	23013	18202	15788	10290	6483	4820
Change 07-14	10%	15%	-4%	51%	0%	31%	-10%	-16%

**Table 2.45: Average Daily Flow of Motor Vehicles at A9 Count Site – Scottish Borders (Source: DfT)**

	50713	10715	50716	78588	74346	714	80391
2000	4971	4415	4910	5143	12591	18426	12657
2001	5001	4489	4984	4910	12018	17614	12125
2002	5249	4675	5540	5158	12691	18644	12870
2003	5460	4940	5765	5345	13200	19438	11502
2004	6014	4976	5810	5543	13714	20273	11968
2005	6033	4974	5516	5723	14174	21066	12404
2006	6215	5283	5603	6042	15048	18712	13197
2007	6257	5432	5735	5873	14621	18201	12845
2008	6162	5358	5649	5982	14916	18570	13113
2009	6274	5456	5746	6085	15195	18908	13363
2010	6178	5381	5654	4849	15178	18876	11671
2011	6272	5478	5758	5008	8787	19531	11786
2012	5004	5519	5791	5057	8814	19305	11593
2013	5040	5570	5045	5010	0	0	12198
2014	5142	5692	5154	5119	0	0	12993
Change 07-14	-18%	5%	-10%	-13%	-	-	1%

- 2.41 In addition to the data collated by the DfT, both Scottish Borders Council and Midlothian Council collect their own traffic data. Midlothian Council has several permanent loop traffic counters throughout the county including on the A7. Data is recorded by hour and direction with some counts classified by vehicle type. The council also have various ad hoc radar surveys, which are undertaken for periods of a week or more at a number of specific sites. This data include hourly flows, directions, and speeds but is less accurate than the former as some vehicles are missed and there is sometimes double counting or false readings.
- 2.42 Scottish Borders Council collects flow, classification and speed data for two locations on the A7 north of Galashiels: the Bow Straight and the Gilston Junction. The data is collected from permanent sites using CA Traffic inductive loop equipment. However, there have been issues with these sites for some time and therefore data is limited. Both Midlothian and Scottish Borders Council have supplied relevant datasets in excel format which will be shared with Transport Scotland.

### Accident Data

- 2.43 Assessing changes in the number of accidents will be important for evaluating the safety impacts of the scheme. Table 2.46 – Table 2.48 below shows the absolute number of accidents in each local authority by severity and Table 2.49 shows the total number of road accidents indexed by the population of each area.

**Table 2.46: Absolute Number of Fatal Road Accidents (Source: Transport Scotland)**

	Midlothian	Scottish Borders	Edinburgh, City of	Total
2009	3	12	6	196
2010	1	8	4	189
2011	2	6	9	175
2012	2	9	13	164
2013	5	4	8	159
Change 2009-2013	67%	-67%	33%	-19%

**Table 2.47: Absolute Number of Serious Road Accidents (Source: Transport Scotland)**

	Midlothian	Scottish Borders	Edinburgh, City of	Total
2009	30	71	136	1,998
2010	27	74	126	1,713
2011	26	57	162	1,676
2012	22	58	175	1,735
2013	24	59	127	1,430
Change 2009-2013	-20%	-17%	-7%	-28%

**Table 2.48: Absolute Number of Road Accidents (All Severities) (Source: Transport Scotland)**

	Midlothian	Scottish Borders	Edinburgh, City of	Total
2009	207	363	1,192	11,556
2010	193	307	1,179	10,295
2011	177	274	1,181	9,986
2012	216	263	1,167	9,786
2013	164	256	1,158	8,986
Change 2009-2013	-21%	-29%	-3%	-22%

**Table 2.49: Number of Road Accidents per 1000 People (All Severities) (Source: Transport Scotland)**

	Midlothian	Scottish Borders	Edinburgh, City of	Total
2009	2.5	3.2	2.6	2.2
2010	2.3	2.7	2.5	2.0
2011	2.1	2.4	2.5	1.9
2012	2.6	2.3	2.4	1.8
2013	1.9	2.2	2.4	1.7
Change 2009-2013	-23%	-30%	-8%	-24%

2.44 Data on accidents is also available below local authority level. The Table below shows the absolute number of accidents occurring between 2010 and

2014 within the study area, with the location of these accidents shown in Figure 2.8.

**Table 2.50: Absolute Number of Accident in the Study Area 2010-2013 (Source: DfT)**

	<b>2010</b>	<b>2011</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>
Midlothian_Tier 1	17	19	25	5	11
Midlothian_Tier 2	37	41	41	40	34
Midlothian_Tier 3	76	65	85	63	71
Scottish Borders_Tier 1	18	15	9	15	11
Scottish Borders_Tier 2	20	14	20	15	19
Scottish Borders_Tier 3	74	75	62	70	63



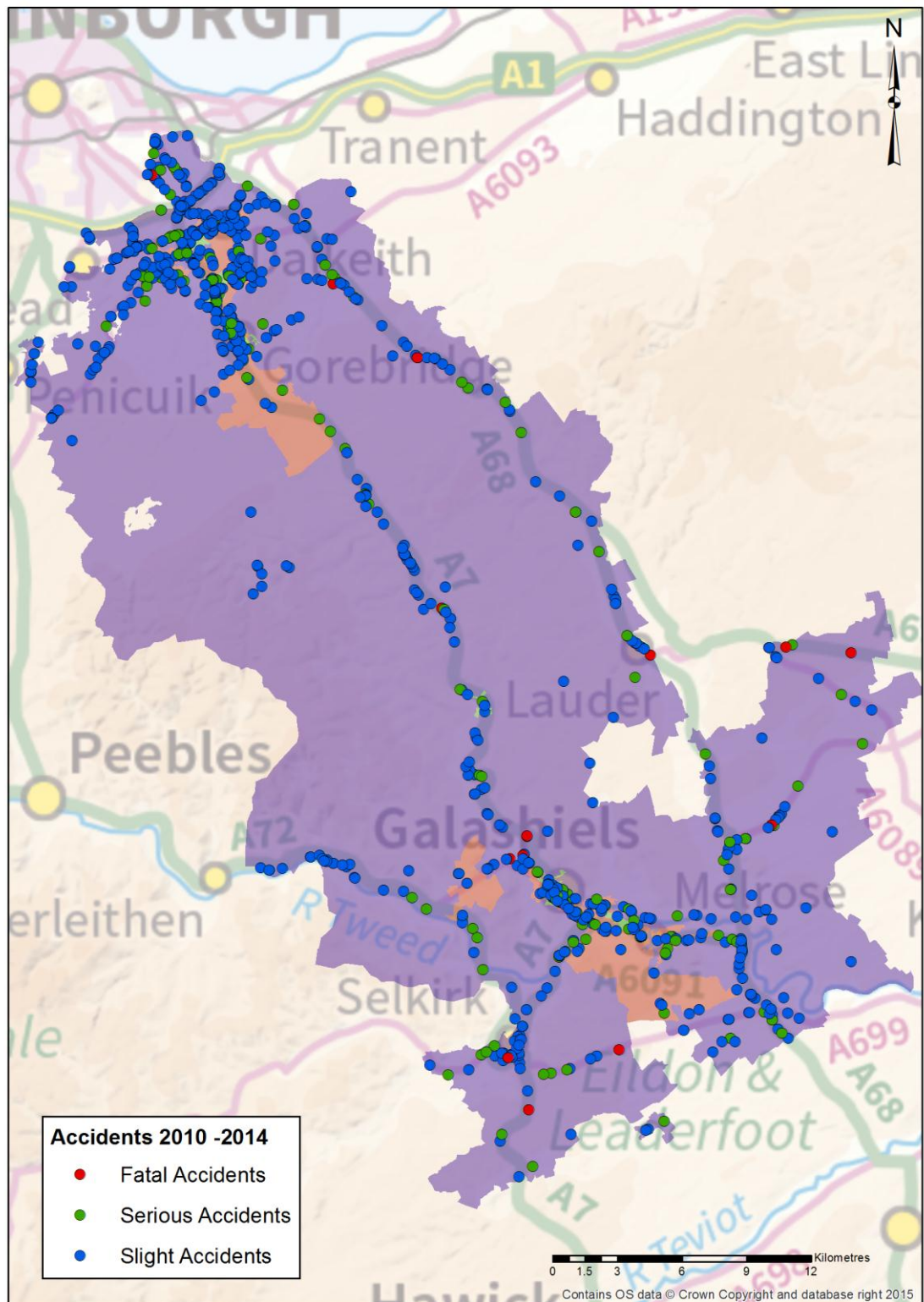


Figure 2.8: Location of Road Accidents within Study Area (2010-2014) (Source: DfT)

## ORR Statistics

2.45 While, given the distances involved, the re-opening of the Borders Railway is unlikely to lead to significant abstraction from other rail stations, there is the potential for some switching from Newcraighall and Wallyford to the new line. In order to ensure the extent of this switching is captured in the later evaluation, baseline data showing station usage figures for Newcraighall and Wallyford Stations prior to the Borders Railway is provided below.

**Table 2.51: ORR Statistics**

Year	Newcraighall	Wallyford
1997-98	-	57,846
1998-99	-	68,089
1999-00	-	79,833
2000-01	-	94,103
2001-02	-	83,036
2002-03	79,617	90,351
2004-05	137,389	110,686
2005-06	159,789	126,719
2006-07	176,933	135,819
2007-08	190,027	159,949
2008-09	182,890	209,260
2009-10	194,184	227,874
2010-11	182,802	221,772
2011-12	191,032	240,842
2012-13	206,930	255,810
2013-14	221,934	268,099

## Sustrans Hands up Survey

2.46 Sustrans undertake an annual survey of travel to school mode used by children enrolled in schools in Scotland. The tables below show the modal share for Midlothian, the Scottish Borders and Edinburgh between 2008 and 2014.

2.47 In 2014, in both Midlothian and the Scottish Borders, walking is the most common travel to school mode, with 48% of children in Midlothian and 45% in the Scottish Borders walking to school. Since 2008, there has been a slight decline in the proportion of children being driven to school in Midlothian whilst the proportion being driven to school in the Scottish Borders has increased.

**Table 2.52: Hands Up Survey Modal Share - Midlothian (Source: Sustrans)**

	2008	2009	2010	2011	2012	2013	2014
Walk	56.5%	54.8%	52.9%	52.3%	48.4%	48.4%	48.4%
Cycle	3.5%	2.7%	3.9%	3.9%	3.8%	4.4%	4.6%
Scooter / Skate	1.0%	1.0%	1.8%	2.4%	4.7%	5.9%	6.5%
Park & Stride	5.6%	5.6%	7.4%	6.9%	8.0%	6.4%	7.1%
Driven	15.4%	16.6%	15.8%	15.0%	13.4%	14.6%	14.9%
Bus	16.8%	18.2%	17.2%	18.1%	18.6%	17.7%	17.4%

Taxi	1.1%	1.1%	1.0%	1.2%	2.9%	2.3%	0.9%
Other	0.1%	0.1%	0.1%	0.2%	0.2%	0.1%	0.1%
Total	9,932	9,177	9,701	10,213	10,618	10,600	10,362

**Table 2.53: Hands Up Survey Modal Share – Scottish Borders (Source: Sustrans)**

	2008	2009	2010	2011	2012	2013	2014
Walk	50.0%	48.6%	48.2%	46.2%	45.5%	44.4%	44.8%
Cycle	1.9%	1.9%	2.3%	2.3%	2.6%	3.4%	3.0%
Scooter / Skate	0.7%	0.5%	0.8%	*	*	2.4%	2.6%
Park & Stride	6.5%	6.8%	8.0%	9.1%	8.6%	8.8%	8.8%
Driven	15.1%	16.2%	15.2%	14.9%	15.4%	16.3%	16.2%
Bus	24.1%	24.0%	23.6%	24.6%	24.2%	22.9%	23.0%
Taxi	1.7%	2.0%	1.9%	1.9%	1.9%	*	1.5%
Other	0.1%	0.0%	0.0%	*	*	*	0.0%
Total	13,729	12,979	13,354	13,301	13,166	13,044	12,828

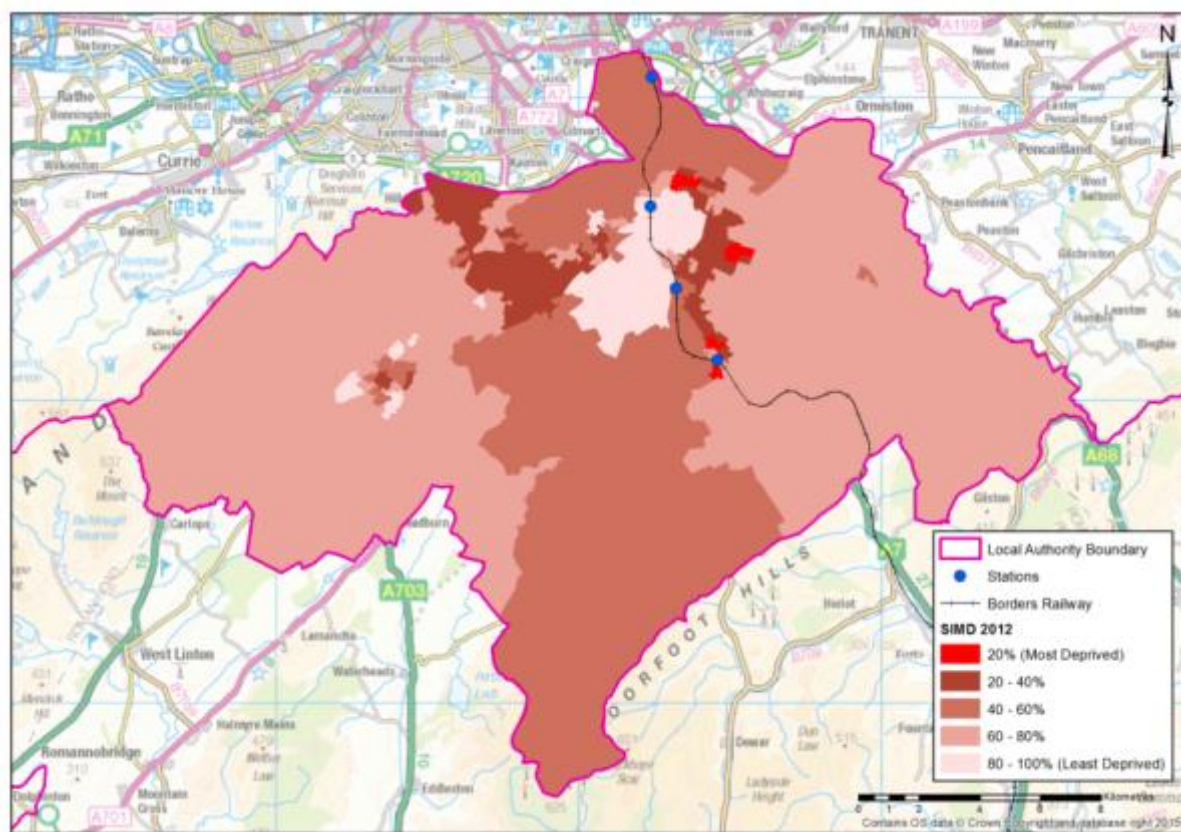
**Table 2.54: Hands Up Survey Modal Share – Edinburgh (Source: Sustrans)**

	2008	2009	2010	2011	2012	2013	2014
Walk	51.5%	54.9%	58.1%	57.6%	54.1%	54.0%	49.6%
Cycle	3.3%	3.6%	4.5%	4.7%	3.7%	5.0%	4.7%
Scooter / Skate	1.6%	1.4%	1.8%	3.1%	3.4%	6.0%	5.4%
Park & Stride	5.5%	3.0%	5.2%	6.2%	6.4%	5.8%	7.8%
Driven	21.2%	22.9%	17.1%	17.7%	18.9%	18.1%	19.0%
Bus	15.7%	13.6%	11.1%	9.5%	11.4%	10.0%	11.4%
Taxi	0.6%	0.4%	0.6%	0.9%	0.6%	0.6%	0.8%
Other	0.6%	0.2%	1.6%	0.3%	1.6%	0.6%	1.2%
Total	26,977	11,503	23,434	19,323	26,161	23,462	31,638

## Scottish Index of Multiple Deprivation

- 2.48 The Scottish Government regularly produces the Scottish Indices of Multiple Deprivation (SIMD), which “identify small area concentrations of multiple deprivation across all of Scotland in a fair way. It allows effective targeting of policies and funding where the aim is to wholly or partly tackle or take account of area concentrations of multiple deprivation”. Areas considered under the data include access, income levels, housing, and health. SIMD is essentially a social tool (i.e. it measures the performance of ‘society’) and, it can act as detailed statistical barometer of the social performance / social capital in a given area.
- 2.49 The generally accepted point at which an area is defined as deprived is when it is classified in the ‘20% most deprived’. Figure 2.9 and Figure 2.10 show the levels of deprivation within the study area in SIMD 2012 by quintile. While the majority of data zones fall within the middle deciles, the figures highlight concentrated pockets of deprivation in both local authority areas including





**Figure 2.10: Midlothian SIMD 2012**

2.50 In terms of the change in deprivation over time, Table 2.55 and 2.56 below show the distribution of data zones in each of the SIMD deciles between 2004 to 2012 for the Scottish Borders and Midlothian respectively. As shown the proportion of the data zones in the ‘20% most deprived’ category in both local authority areas has increased since 2004.

**Table 2.55: Distribution of data zones in the Scottish Borders 2004-2012**

	0-20% (Most Deprived)	20-40%	40-60%	60-80%
2004	3%	6%	34%	41%
2006	5%	10%	30%	41%
2009	5%	11%	31%	44%
2012	5%	15%	33%	40%

**Table 2.56: Distribution of data zones in Midlothian 2004-2012**

	0-20% (Most Deprived)	20-40%	40-60%	60-80%
2004	5%	24%	26%	24%
2006	9%	29%	20%	23%
2009	7%	33%	21%	21%
2012	7%	29%	25%	23%

## Property

2.51 Property prices and levels of development are barometers of the economic desirability of an area. Locations with significant planned development and higher than average house prices provide an indication of high demand, which itself is driven by employment opportunities and quality of life factors. This section provides a brief summary of the available data on the residential property market within the Scottish Borders and Midlothian.

### House Sales and Prices

2.52 Table 2.57 and 2.58 show this data indexed by the adult population (18+) in each location.

**Table 2.57: Number of House Sales (Source: Scottish Neighbourhood Statistics)**

Year	Borders	Midlothian	Edinburgh	Scotland
1993	1,570	982	10,706	79,300
1994	1,592	1,003	11,236	79,661
1995	1,470	1,000	10,395	77,489
1996	1,476	1,015	11,094	75,361
1997	1,621	1,035	11,908	78,289
1998	1,553	1,141	12,367	82,959
1999	1,628	1,275	12,600	87,363
2000	1,650	1,212	12,008	91,517
2001	1,875	1,134	12,893	97,656
2002	2,193	1,206	13,141	108,817
2003	2,111	1,337	13,003	107,725
2004	1,709	1,223	12,732	99,009
2005	2,008	1,188	13,130	114,125
2006	2,632	1,467	14,642	126,763
2007	2,618	1,650	14,489	129,836
2008	1,728	1,199	8,888	83,518
2009	1,004	672	6,058	53,630
2010	1,199	733	6,559	59,033
2011	1,003	646	6,186	53,580
2012	1,117	798	6,749	59,418
2013	1,331	1,119	8,403	73,474

**Table 2.58: Number of Houses Sold per 1000 Adult Population (Source: Scottish Neighbourhood Statistics and National Records of Scotland)**

Year	Borders	Midlothian	Edinburgh	Scotland
2002	26	19	36	27
2003	25	22	36	27
2004	20	20	35	25
2005	23	19	36	28
2006	30	23	39	31
2007	29	26	39	32
2008	19	19	23	20
2009	11	10	16	13
2010	13	11	17	14
2011	11	10	16	13
2012	12	12	17	14
2013	14	17	21	17

2.53 Table 2.59 and 2.60 show the average and median house prices respectively in each of the local authority areas as well as Scotland as a whole between 1993 and 2013. The median price are based on all second hand and new build sales and the mean price is based on new build and second hand sales between £20,000 and £1,000,000.

**Table 2.59: Median House Price (£)**

Year	Borders	Midlothian	Edinburgh	Scotland
1993	40,000	47,850	50,500	46,000
1994	42,385	49,500	54,000	48,000
1995	43,050	56,000	57,500	49,000
1996	43,500	54,500	59,500	50,000
1997	49,650	59,995	63,000	53,400
1998	52,195	60,000	68,495	55,000
1999	55,500	65,500	74,950	58,000
2000	58,750	63,500	79,000	59,750
2001	59,500	69,027	84,150	60,000
2002	67,000	79,923	104,000	68,500
2003	82,000	98,995	124,585	80,053
2004	105,000	108,250	140,118	95,599
2005	112,500	119,000	148,807	107,107
2006	131,580	135,000	163,000	120,000
2007	150,000	150,000	177,177	135,000
2008	149,000	152,995	179,000	138,000
2009	148,000	152,125	170,000	134,000
2010	155,000	154,995	180,023	136,000
2011	150,000	148,350	180,000	137,000
2012	140,000	140,853	177,000	130,050
2013	140,070	155,000	178,136	135,000

**Table 2.60: Mean House Price (£)**

Year	Borders	Midlothian	Edinburgh	Scotland
1993	53,301	55,741	62,487	55,200
1994	56,477	59,676	67,359	57,798
1995	56,978	65,461	70,390	58,990
1996	58,484	65,724	71,968	60,277
1997	64,691	68,777	77,292	63,775
1998	67,227	72,693	84,337	66,127
1999	73,222	78,529	93,389	70,595
2000	80,720	84,729	101,199	74,224
2001	81,293	92,523	108,547	78,220
2002	93,968	100,830	131,137	87,144
2003	111,580	127,173	150,538	101,821
2004	134,798	141,502	168,610	119,658
2005	141,373	147,791	179,258	129,832
2006	156,546	162,883	197,915	144,112
2007	175,654	181,151	217,372	160,736
2008	181,628	185,855	222,857	165,214
2009	173,398	178,034	210,365	159,075
2010	175,299	177,094	221,948	163,396
2011	178,485	170,766	221,303	163,264
2012	169,292	172,893	219,176	158,491
2013	166,616	182,515	219,771	162,266

2.54 Data on the number of house sales is also available at data zone level. In order to analyse and report this data the study area was divided into categories as defined in section 2.10 above. Table 2.61 shows the number of house sales across these areas over the period 1993-2013.

**Table 2.61: Number of House Sales (Source: Scottish Neighbourhood Statistics)**

	Borders Catchment	Midlothian Catchment	Edinburgh	Remainder of Scottish Borders	Remainder of Midlothian	Scotland
1993	658	591	10706	912	391	79,300
1994	650	620	11236	942	383	79,661
1995	637	589	10395	833	411	77,489
1996	624	597	11094	852	418	75,361
1997	637	656	11908	984	379	78,289
1998	610	661	12367	943	480	82,959
1999	571	801	12600	1057	474	87,363
2000	591	787	12008	1059	425	91,517
2001	739	744	12893	1136	390	97,656
2002	874	769	13141	1319	437	108,817
2003	877	801	13003	1234	536	107,725
2004	666	783	12732	1043	440	99,009
2005	822	778	13130	1186	410	114,125
2006	1014	941	14642	1618	526	126,763
2007	983	1060	14489	1635	590	129,836
2008	629	874	8888	1099	325	83,518
2009	348	509	6058	656	163	53,630
2010	410	491	6559	789	242	59,033
2011	355	474	6186	648	172	53,580



2012	348	554	6749	769	244	59,418
2013	463	786	8403	868	333	73,474

### New Starts and Completions

2.55 Table 2.62 and Table 2.63 show the total number of new building starts and completions in each of the local authority areas, Edinburgh and Scotland as a whole between 1993 and 2014 and Table 2.64 and Table 2.65 show these figures indexed by the adult population in each location.

**Table 2.62: All New Starts (Source: Scottish Neighbourhood Statistics)**

Year	Scottish Borders	Midlothian	Edinburgh, City of	Scotland
1996-1997	467	409	2529	22014
1997-1998	348	357	2486	21677
1998-1999	280	255	2729	20510
1999-2000	524	331	1736	22646
2000-2001	521	182	1201	22313
2001-2002	684	173	1876	23176
2002-2003	655	124	1169	22274
2003-2004	655	119	3190	26991
2004-2005	466	130	3983	27003
2005-2006	509	222	1754	26374
2006-2007	1104	408	1861	28440
2007-2008	833	886	1861	26406
2008-2009	573	295	1643	19295
2009-2010	414	314	1557	15129
2010-2011	260	489	572	13519
2011-2012	280	640	1162	13822
2012-2013	309	440	913	12907
2013-2014	349	631	1498	15028
Change 07/08 - 13/14	-58%	-29%	-20%	-43%

**Table 2.63: All Completions (Source: Scottish Neighbourhood Statistics)**

Year	Scottish Borders	Midlothian	Edinburgh, City of	Scotland
1996-1997	590	369	1806	20696
1997-1998	329	387	1879	22587
1998-1999	379	285	3065	20657
1999-2000	492	312	2376	23107
2000-2001	599	255	1593	22111
2001-2002	668	136	2295	22571
2002-2003	816	169	1457	22747
2003-2004	653	174	1555	23822
2004-2005	572	102	3588	26468
2005-2006	555	114	1711	24947
2006-2007	649	196	1896	24264
2007-2008	694	295	1730	25787
2008-2009	620	663	1786	20954
2009-2010	433	507	1118	17111
2010-2011	566	434	1029	16382
2011-2012	211	510	1401	15959
2012-2013	318	722	1165	14054
2013-2014	293	585	1370	14737
Change 07/08 - 13/14	-58%	98%	-21%	-43%

**Table 2.64: Number of New Starts per 1000 Adults (18+)**

Year	Scottish Borders	Midlothian	Edinburgh, City of	Scotland
2002-2003	7.7	2.0	3.2	5.6
2003-2004	7.6	1.9	8.7	6.8
2004-2005	5.4	2.1	10.9	6.7
2005-2006	5.8	3.6	4.7	6.5
2006-2007	12.5	6.5	5.0	7.0
2007-2008	9.3	14.1	4.9	6.4
2008-2009	6.3	4.6	4.3	4.6
2009-2010	4.5	4.9	4.1	3.6
2010-2011	2.8	7.6	1.5	3.2
2011-2012	3.0	9.7	2.9	3.2
2012-2013	3.4	6.6	2.3	3.0
2013-2014	3.8	9.5	3.7	3.5
Change 07/08 - 13/14	-59%	-33%	-25%	-45%

**Table 2.65: Number of Completions per 1000 Adults (18+)**

Year	Scottish Borders	Midlothian	Edinburgh, City of	Scotland
2002-2003	9.6	2.7	4.0	5.7
2003-2004	7.6	2.8	4.3	6.0
2004-2005	6.6	1.6	9.8	6.6
2005-2006	6.3	1.8	4.6	6.2
2006-2007	7.3	3.1	5.1	5.9
2007-2008	7.8	4.7	4.6	6.3
2008-2009	6.8	10.4	4.7	5.0
2009-2010	4.8	7.9	2.9	4.1
2010-2011	6.2	6.7	2.6	3.9
2011-2012	2.3	7.8	3.5	3.7
2012-2013	3.5	10.9	2.9	3.3
2013-2014	3.2	8.8	3.4	3.4
Change 07/08 - 13/14	-59%	87%	-26%	-45%

2.56 Table 2.66 - 2.67 show the total number of private new building starts and completions (i.e. those completed by commercial developers and individuals) in each of the local authority areas, Edinburgh and Scotland as a whole and Table 2.68 - 2.69 show these figures indexed by the adult population in each location.

**Table 2.66: Private New Starts (Source: Scottish Neighbourhood Statistics)**

Year	Scottish Borders	Midlothian	Edinburgh, City of	Scotland
1996-1997	346	378	2226	17913
1997-1998	293	263	2138	18535
1998-1999	201	241	2201	16995
1999-2000	419	286	1294	18364
2000-2001	416	162	882	17614
2001-2002	615	124	1585	18518
2002-2003	594	110	973	18567
2003-2004	594	119	2758	22370
2004-2005	419	103	3587	22597
2005-2006	473	207	1115	21247
2006-2007	1016	338	1499	22856
2007-2008	783	482	1289	20192
2008-2009	486	199	1102	13530
2009-2010	323	194	954	9534
2010-2011	199	181	145	8707
2011-2012	248	541	745	10436
2012-2013	257	344	637	10110
2013-2014	278	631	1115	11185
Change 07/08 - 13/14	-64%	31%	-13%	-45%

**Table 2.67: Private Completions (Source: Scottish Neighbourhood Statistics)**

Year	Scottish Borders	Midlothian	Edinburgh, City of	Scotland
1996-1997	582	289	1650	17492
1997-1998	309	303	1456	17984
1998-1999	256	255	3005	18784
1999-2000	377	280	1811	19074
2000-2001	504	211	1199	18195
2001-2002	594	124	1874	18309
2002-2003	758	138	1169	18938
2003-2004	612	148	1372	20454
2004-2005	493	102	3199	22444
2005-2006	505	105	1313	20249
2006-2007	603	180	1457	21027
2007-2008	625	255	1246	21662
2008-2009	538	360	1453	16041
2009-2010	399	339	639	11122
2010-2011	401	275	535	10657
2011-2012	210	337	721	10069
2012-2013	235	472	729	9847
2013-2014	271	483	953	10686
Change 07/08 - 13/14	-57%	89%	-24%	-51%

**Table 2.68: Number of Private New Start per 1000 Adults (18+)**

Year	Scottish Borders	Midlothian	Edinburgh, City of	Scotland
2002-2003	7.0	1.8	2.7	4.7
2003-2004	6.9	1.9	7.6	5.6
2004-2005	4.8	1.7	9.8	5.6
2005-2006	5.4	3.3	3.0	5.2
2006-2007	11.5	5.4	4.0	5.6
2007-2008	8.7	7.7	3.4	4.9
2008-2009	5.4	3.1	2.9	3.3
2009-2010	3.5	3.0	2.5	2.3
2010-2011	2.2	2.8	0.4	2.1
2011-2012	2.7	8.2	1.9	2.5
2012-2013	2.8	5.2	1.6	2.4
2013-2014	3.0	9.5	2.8	2.6
Change 07/08 - 13/14	-66%	23%	-19%	-47%

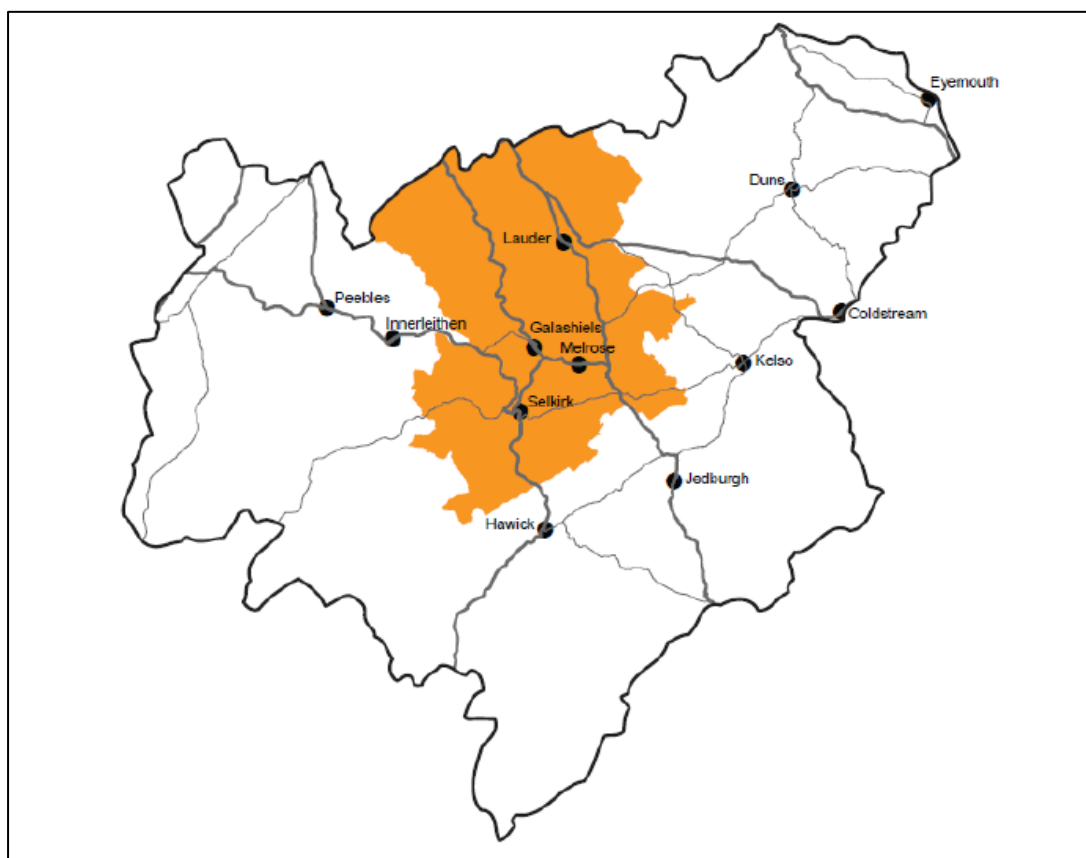
**Table 2.69: Number of Private Completions per 1000 Adults (18+)**

Year	Scottish Borders	Midlothian	Edinburgh, City of	Scotland
2002-2003	8.9	2.2	3.2	4.8
2003-2004	7.1	2.4	3.8	5.1
2004-2005	5.7	1.6	8.7	5.6
2005-2006	5.8	1.7	3.6	5.0
2006-2007	6.8	2.9	3.9	5.2
2007-2008	7.0	4.1	3.3	5.3
2008-2009	5.9	5.6	3.8	3.9
2009-2010	4.4	5.3	1.7	2.7
2010-2011	4.4	4.2	1.4	2.5
2011-2012	2.3	5.1	1.8	2.4
2012-2013	2.6	7.1	1.8	2.3
2013-2014	2.9	7.2	2.4	2.5
Change 07/08 - 13/14	-58%	79%	-29%	-53%

2.57 The Scottish Borders Council Housing Land Audit 2014 includes a breakdown of the number of completions within the Waverley Development Contribution Area. These are provided below along with a map showing the extent of the Waverley Contribution Area. In 2013/14, approximately 38% of all completions in the Scottish Borders fell within the Contribution Area.

**Table 2.70: Number of Completed Residential Units in Waverley Developer Contribution Area (Source: Scottish Borders Council Housing Land Audit 2014)**

2009/10	2010/11	2011/12	2012/13	2013/14
163	187	89	101	110



**Figure 2.11: Waverley Contribution Area (Source: Scottish Borders Council Housing Land Audit 2014)**

## **Town Centre Vitality**

### Retail Health

2.58 Scottish Borders Council undertakes a bi-annual survey of retail vacancy levels in settlements across the Scottish Borders. Vacancy levels of ground floor town centre units within the following user classes are monitored:

- 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.

2.59 The table below shows the retail vacancy rates over the last five years for each settlement. Data is also available on user class type; the number and proportion of retail chains; and the length of time units have been vacant.

**Table 2.71: Retail Unit Vacancy Rates (Source: Scottish Borders Council)**

	Summer 2010	Winter 2010	Summer 2011	Winter 2011	Summer 2012	Winter 2012	Summer 2013	Winter 2013	Summer 2014	Winter 2014
Chirnside	8%	8%	8%	15%	8%	15%	15%	8%	15%	27%
Coldstream	6%	12%	14%	8%	4%	6%	4%	10%	12%	12%
Duns	13%	14%	14%	14%	14%	9%	9%	8%	8%	8%
Earlston	5%	9%	9%	9%	9%	4%	4%	4%	0%	0%
Eyemouth	12%	7%	7%	5%	3%	6%	10%	9%	8%	9%
Wilderhaugh <sup>3</sup>	10%	12%	8%	6%	6%	10%	11%	7%	11%	11%
Galashiels	15%	14%	15%	14%	14%	17%	15%	15%	19%	18%
Hawick	17%	16%	16%	19%	14%	16%	16%	17%	14%	16%
Innerleithen	4%	7%	6%	2%	0%	2%	2%	2%	2%	4%
Jedburgh	13%	10%	12%	11%	10%	11%	10%	9%	9%	9%
Kelso	7%	6%	6%	7%	6%	7%	9%	8%	7%	9%
Lauder	5%	0%	0%	5%	5%	0%	5%	5%	5%	11%
Melrose	4%	5%	1%	5%	8%	4%	1%	0%	0%	3%
Newton St Boswells	8%	8%	8%	8%	8%	17%	17%	17%	25%	25%
Peebles	8%	8%	10%	7%	7%	9%	9%	6%	6%	7%
Selkirk	14%	16%	15%	15%	16%	17%	15%	16%	16%	16%
St Boswells	18%	9%	9%	9%	17%	9%	9%	9%	9%	0%
Tweedbank	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
West Linton	8%	0%	0%	0%	0%	0%	0%	0%	0%	0%

### Town Centre Footfall

2.60 Scottish Borders Council has monitored town centre footfall annually since 2007. Footfall is recorded in nine Borders town centres: Duns, Eyemouth (since 2012), Galashiels, Hawick, Jedburgh, Kelso, Melrose, Peebles and Selkirk. Table 2.72 and 2.73 below show the average weekly footfall and the percentage change in footfall in each settlement between 2007 and 2014. Overall, footfall has declined across all towns since 2007, with the largest decline in Melrose. The report also compares trends in footfall levels with weather and settlement population. It is noted that the results for Melrose and Hawick in 2014 do not fit the longer term trends and should therefore be treated with caution.

**Table 2.72: Average Weekly Footfall per Settlement 2007-2014 (Source: Scottish Borders Council)**

	2007	2008	2009	2010	2011	2012	2013	2014
Galashiels	9500	9370	8710	8150	8120	8280	8100	7780
Peebles	9840	8980	9500	8590	8120	7940	7140	7610
Kelso	5050	5170	5210	4790	4170	4360	4130	4980
Hawick	9680	9990	9740	9130	8190	7480	6200	3750
Jedburgh	2920	3400	3260	2960	2710	2900	2700	2610

<sup>3</sup> Two centres are monitored in Galashiels, the town centre, and a second centre at Wilderhaugh

Eyemouth	-	-	-	-	-	2220	1880	2150
Selkirk	3690	3590	3250	2930	2580	2660	2420	2090
Duns	2160	2200	2050	1820	1580	1710	1600	1780
Melrose	3540	3340	3420	3200	2930	3430	3390	990
Total (excluding Eyemouth)	46380	46040	45140	41570	38400	38760	35680	31590

**Table 2.73: Percentage change in Average Weekly Footfall per Settlement, 2007-2014 (Source: Scottish Borders Council)**

	2007	2008	2009	2010	2011	2012	2013	2014
Hawick	3	-3	-6	-10	-9	-17	-40	-61
Peebles	-9	6	-10	-5	-2	-10	7	-23
Galashiels	-1	-7	-6	0	2	-2	-4	-18
Kelso	2	1	-8	-13	5	-5	21	-1
Melrose	-6	2	-6	-8	17	-1	-71	-72
Jedburgh	16	-4	-9	-8	7	-7	-3	-11
Selkirk	-3	-9	-10	-12	3	-9	-14	-43
Duns	2	-7	-11	-13	8	-6	11	-18
Eyemouth	-	-	-	-	-	-15	14	
Total (excluding Eyemouth)	-1	-2	-8	-8	1	-8	-11	-32

## Tourism

2.61 As well as outbound sourced travel there is potential for the re-opening of the railway to contribute to a growth in tourism along the line, including the running of steam heritage services. Indeed, Scottish Borders Council has repeatedly claimed that in-bound tourism is one of the most important benefits that the new service will deliver. It is therefore important to identify available sources of tourism data which can be used to inform the baseline and evaluation. This will be combined with the results of the Panel and Business Surveys to provide an overall picture of tourism within the study area prior to the line re-opening.

### Visitor Numbers

2.62 Visit Scotland collect data on visitor numbers which is reported on an annual basis. Data is available at the local authority level on the number of tourist trips made, tourist spend, and average trip duration, with visitor numbers for the top attractions reported for the Scottish Borders and for the combined area of Edinburgh & the Lothians<sup>4</sup>. Table 2.74 and 2.75 show the number of tourist trips made and the tourist spend by residents of Great Britain and overseas to Edinburgh, the Lothians and the Scottish Borders in 2013.

<sup>4</sup> Data for previous years can be downloaded from [http://www.visitscotland.org/research\\_and\\_statistics/tourismstatistics/regions.aspx](http://www.visitscotland.org/research_and_statistics/tourismstatistics/regions.aspx), accessed 16<sup>th</sup> September 2015



**Table 2.74: Number of Tourist Trips by residents of Great Britain and overseas to Edinburgh, the Lothians and the Scottish Borders 2013**

Location	GB Tourist Trips (000s)	Overseas Tourist Trips (000s)	Total
Edinburgh	2,148	1,303	3,451
Lothians	315	65	380
Scottish Borders	436	43	479
Scotland	12,122	2,443	14,565

**Table 2.75: Tourist spend by residents of Great Britain and overseas to Edinburgh, the Lothians and the Scottish Borders 2013**

Location	GB Tourist Spend (£m)	Overseas Tourist Spend (£m)	Total
Edinburgh	558	593	1,151
Lothians	46	32	78
Scottish Borders	96	15	111
Scotland	2,889	1,680	4,569

### Visitor Numbers by Attraction

2.63 The tables below provide data on the top tourism attractions in the Scottish Borders and Edinburgh and the Lothians based on visitor numbers in 2013 as reported by Visit Scotland.

**Table 2.76: Top Attractions in Edinburgh and the Lothians in 2013 (Source: Visit Scotland)**

Visitor Attraction	Visitor Numbers
National Museum of Scotland	1,768,090
Edinburgh Castle	1,420,027
St Giles Cathedral	940,530
Scottish National Gallery	933,296
Edinburgh Zoo	760,897

**Table 2.77: Top Attractions in the Scottish Borders in 2013 (Source: Visit Scotland)**

Visitor Attraction	Visitor Numbers
Tweed Valley Forest Park	361,000
Heart of Hawick	155,933
Teviot Watergardens, Kelso	155,737
Melrose Abbey	47,010
St Abb's Head	46,815

2.64 In addition to collating the published secondary data on visitor numbers, key tourist destinations in the study area were also contacted and asked to provide their own data. Figures provided by the National Mining Museum Scotland based in Midlothian and Abbotsford House based in the Scottish Borders are presented in the Tables below.

**Table 2.78: Visitor Numbers (Source: National Mining Museum Scotland)**

Year	Visitor Numbers
2012/13	61,345
2013/14	59,137
2014/15	68,062

**Table 2.79: Visitor Numbers (Source: Abbotsford House)**

Year	Visitor Numbers
2014 (Dec – Dec)	40,635

### Employment in Sustainable Tourism

2.65 Table 2.80 and 2.81 show the level of and growth in employment in sustainable tourism across the study area between 2009 and 2013.

**Table 2.80: Employment in Sustainable Tourism<sup>5</sup> (Source: BRES 2013)**

	2009	2010	2011	2012	2013
Scottish Borders	3,300	3,100	3,500	3,100	3,500
Midlothian	1,800	1,400	1,600	1,400	1,800

<sup>5</sup> defined using the following SIC07 industry classifications for tourism as specified within the Scottish Government's growth sector: SIC 55.1; SIC 55.2; SIC 55.3; SIC 56.1; SIC 56.3; SIC 79.12; SIC 79.9; SIC 91.02; SIC 91.03; SIC 91.04; SIC 93.11; SIC 93.199; SIC 93.21; and SIC 93.29

Scotland	27100	27800	28600	27,800	31600
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**Table 2.81: Percentage Growth in Sustainable Tourism (Source: BRES 2013)**

	2009	2010	2011	2012	2013
Scottish Borders	N/A	6%	-13%	11%	-13%
Midlothian	N/A	22%	-14%	13%	-29%
Scotland	N/A	-3%	-3%	3%	-14%

### 3 Public transport accessibility

#### Overview

- 3.1 The re-opening of the Borders Rail Line will bring about considerable changes to transport accessibility in the central Borders and Midlothian. Typical travel times by public transport from Galashiels to Edinburgh will be reduced from around 80 minutes to around 50 minutes. From Gorebridge, journey times will be reduced from around 55 minutes to 25 minutes. Linked to changes around the immediate station environments will be improvements to ‘feeder’ bus services especially at Galashiels.
- 3.2 Examining such changes will be particularly important for the evaluation of the scheme against Investment Objectives 1, 2 and 3 and are likely to have a significant impact on both travel patterns and development activity within the corridor. In order to ensure these changes are adequately captured during the evaluation this chapter reviews the public transport network and accessibility prior to the opening of the line.

#### Public Transport Accessibility

- 3.3 Public transport data from July 2014 was used to create an overview of existing public transport provision along the A7 corridor. Bus services that currently serve settlements along the rail route are summarised in the Tables below. The key service that runs along the entirety of the corridor is the First Scottish Borders X95. There are also routes connecting Hawick, Selkirk and Melrose with Galashiels and Tweedbank. Lothian Buses operate several routes between Gorebridge, Newtongrange, Eskbank and Edinburgh at relatively high frequency.

**Table 3.1: Bus service provision along A7 corridor**

Number	Operator	Route	Frequency
X95/95A	First Scottish Borders	Galashiels - Edinburgh (A7 corridor)	2 per hour
29/X29	Lothian Buses	Gorebridge - Edinburgh	5 per hour
33	Lothian Buses	Gorebridge - Edinburgh	4 per hour
39	Lothian Buses	Gorebridge/Newtongrange/Eskbank/Dalkeith	3 per hour
49	Lothian Buses	Eskbank/Dalkeith - Edinburgh	4 per hour
3	Lothian Buses	Dalkeith/Eskbank - Edinburgh	6 per hour
8/8A/9/9A	First Scottish Borders	Melrose - Galashiels	4 per day
72	First Scottish Borders	Selkirk - Tweedbank - Melrose	1 per hour
73	First Scottish Borders	Selkirk - Galashiels	1 per hour

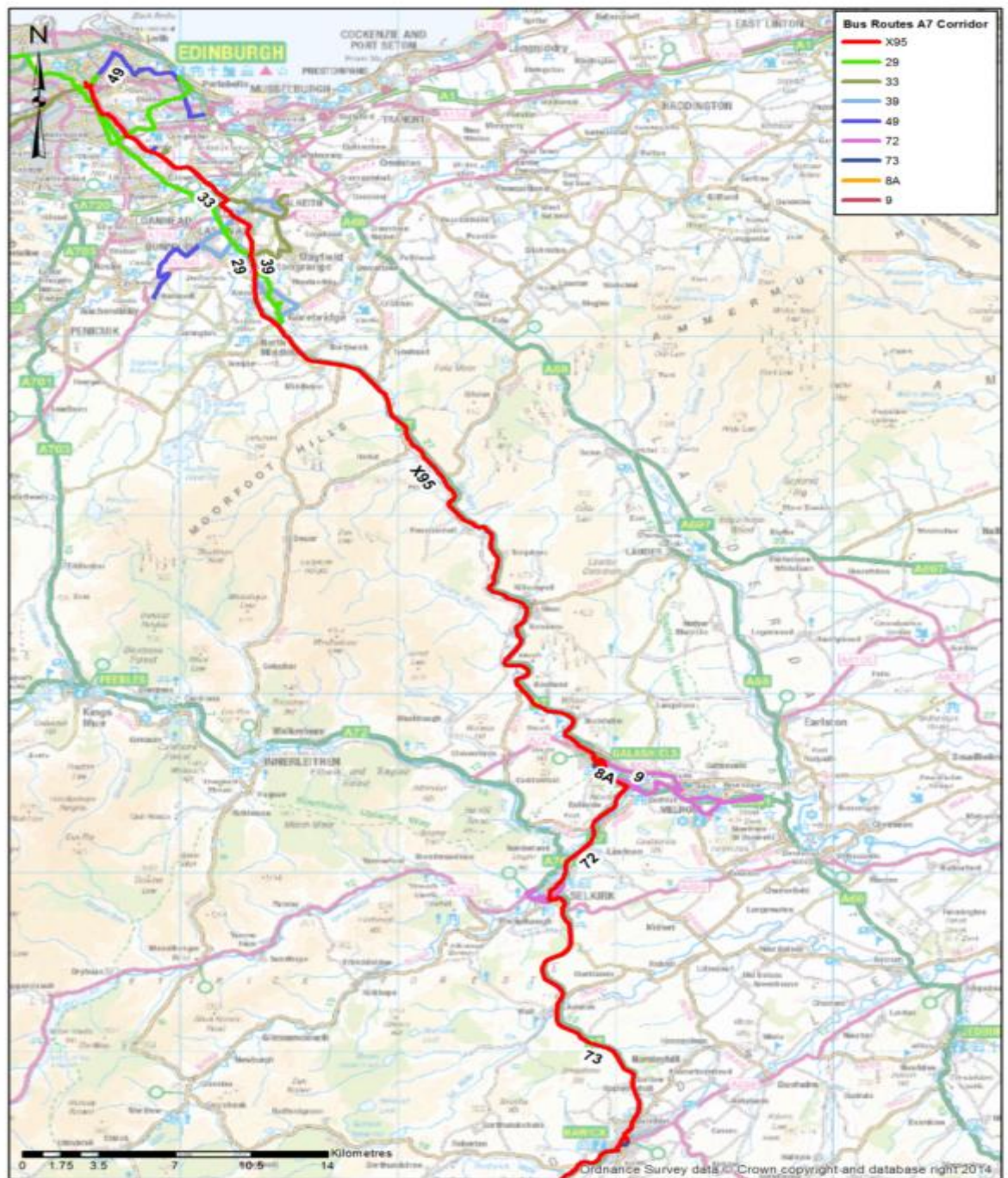


Figure 3.1: Bus routes along the A7 corridor

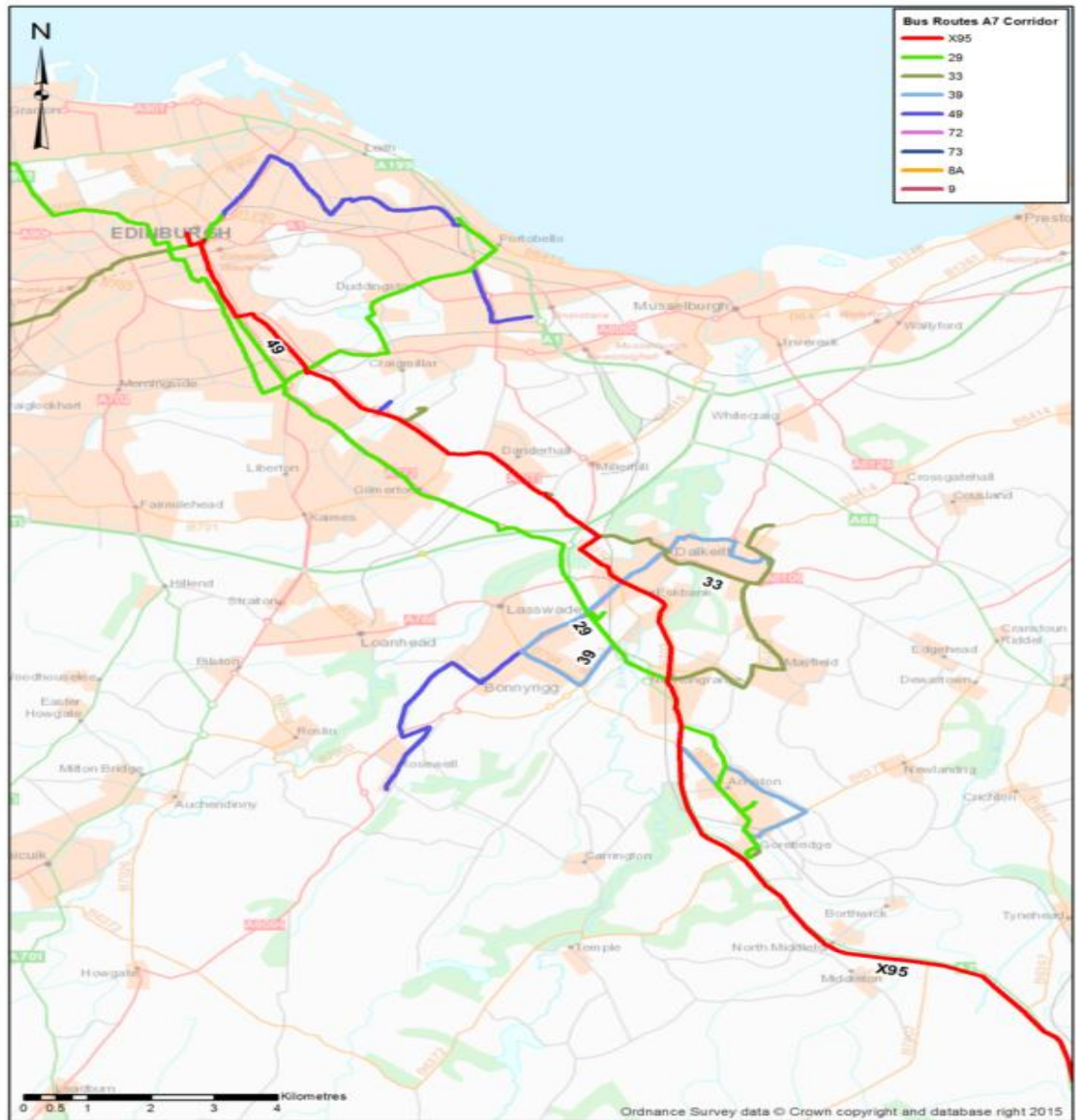


Figure 3.2: Bus routes between Midlothian and Edinburgh

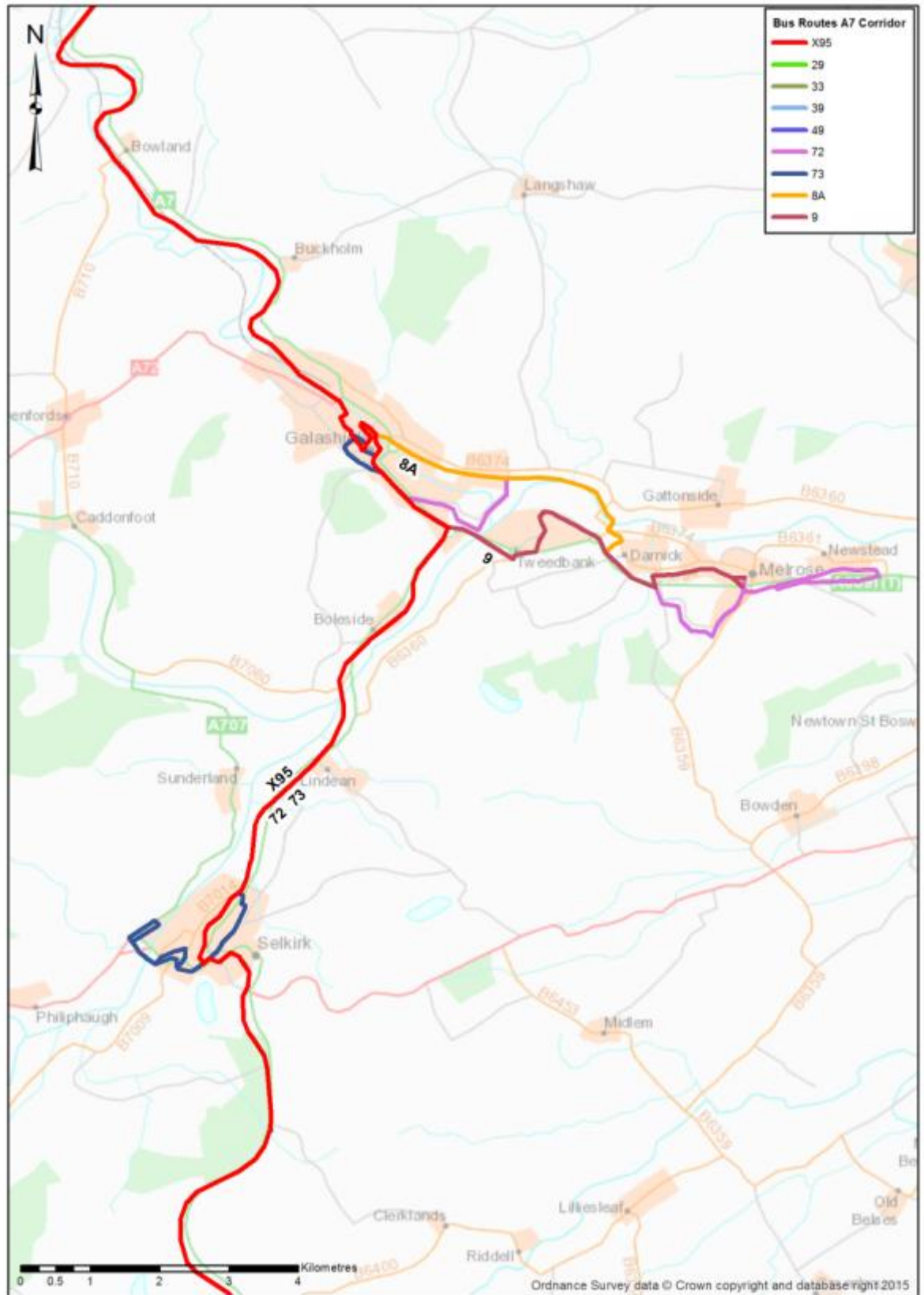


Figure 3.3: Bus routes between Galashiels, Tweedbank and surrounding towns

- 3.4 Baseline accessibility provided by public transport was calculated using TRACC software. Three calculations were undertaken, including access from the Borders to/from Edinburgh in the morning and evening peaks respectively. These are presented in the Figures 3.4 and 3.5.
- 3.5 Furthermore, a Hansen measure was calculated which considered the relative accessibility of the Borders to all centres of employment across southeast Scotland, presented in the Figure 3.6 below; a higher score represents access to a greater number of jobs within shorter travel times. As would be expected, settlements in Midlothian exhibit a higher score than towns in the Scottish Borders, due to being better connected to Edinburgh and other key employment centres in the region.



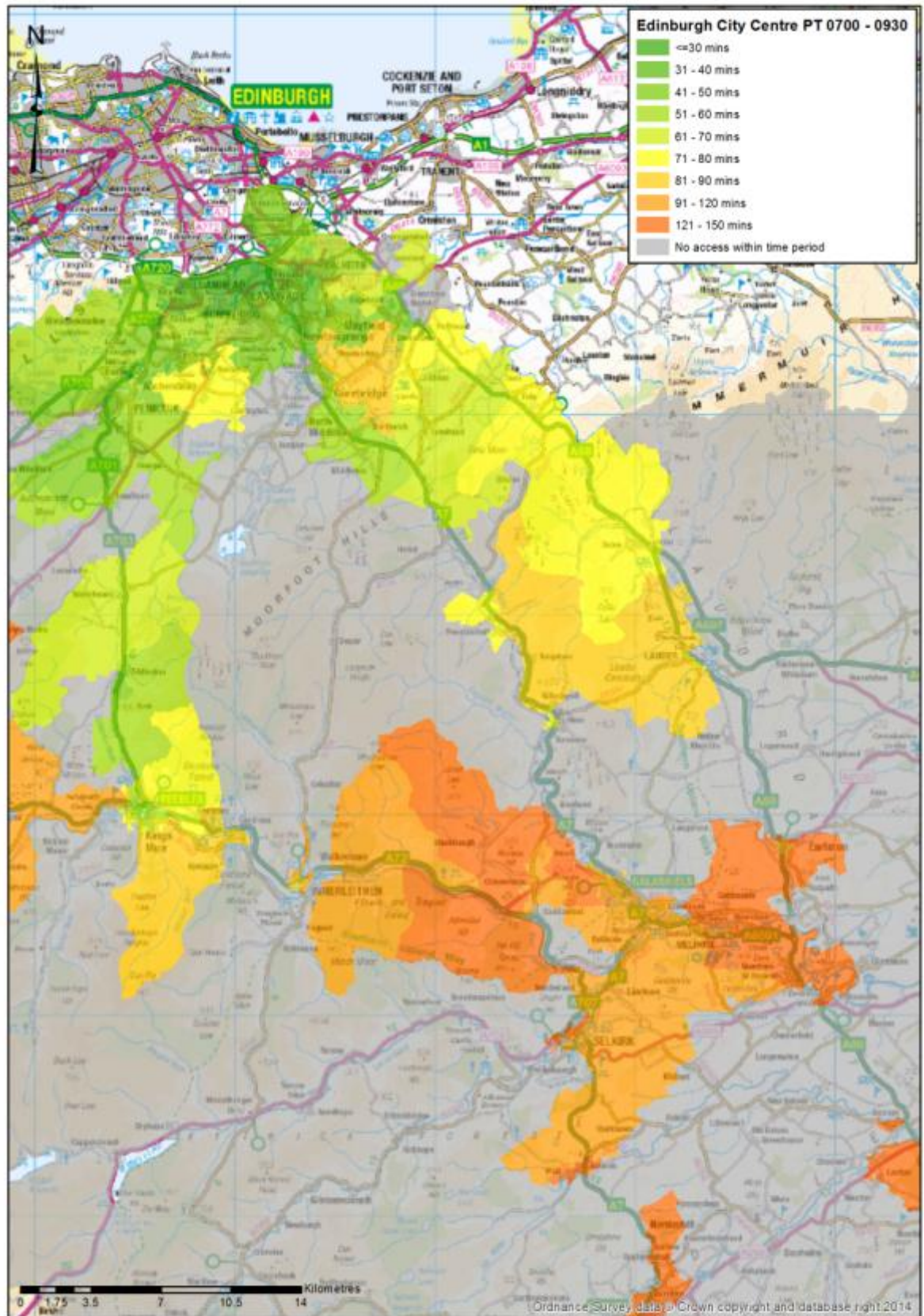


Figure 3.4: Public transport access to Edinburgh city centre in the AM peak

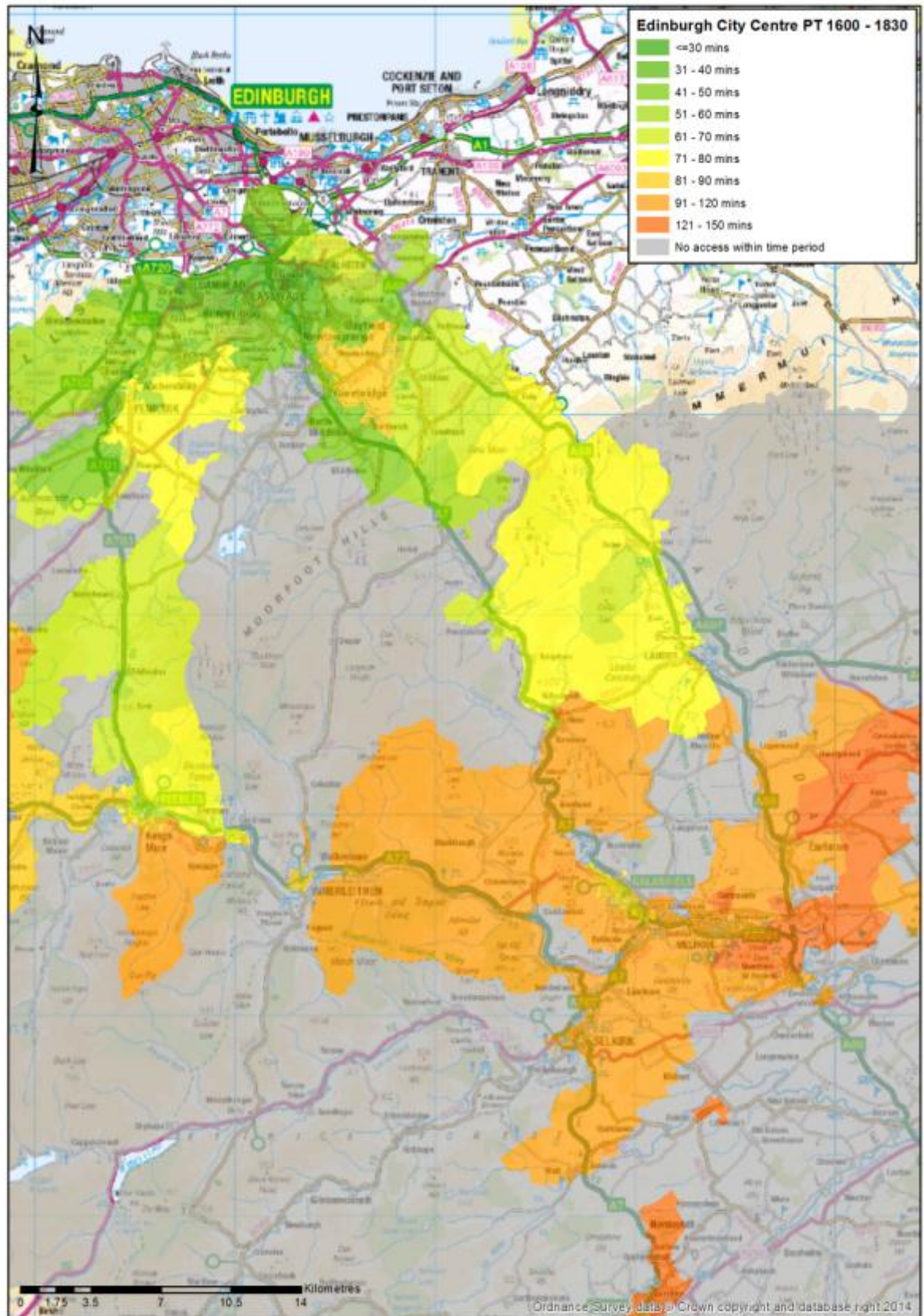


Figure 3.5: Public transport access from Edinburgh city centre in the PM peak

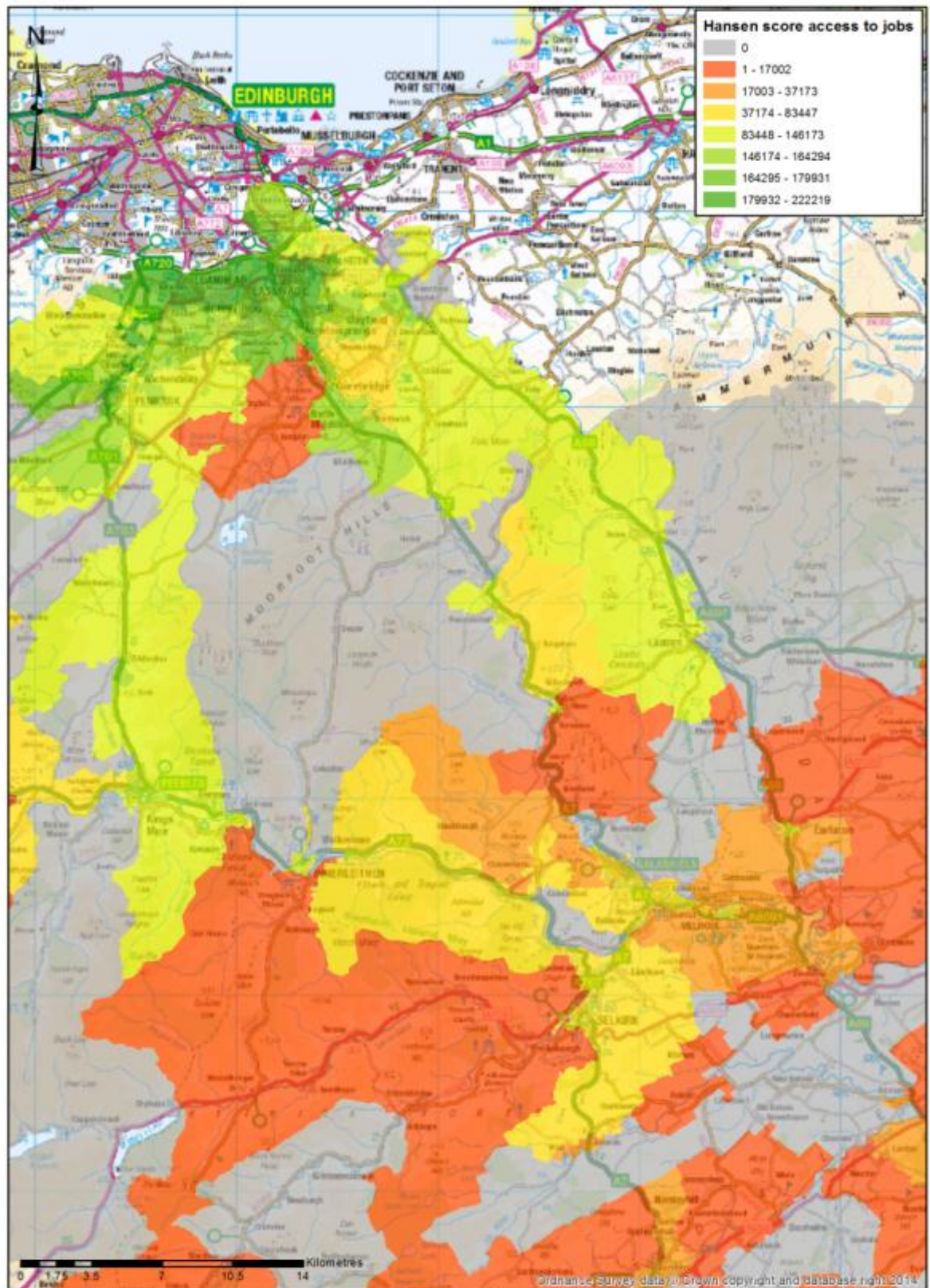


Figure 3.6: Hansen accessibility measure to employment – higher score denotes better jobs access



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