

George Street ETRO Visitor Research *Quarter 2 Findings December 2014 to February 2015*

Key Findings Presentation
March 2015



What are we doing?

Aim

- To understand visitors to George Street:
 - Profile and reason for visit
 - Attitudes towards George Street generally
 - Their views on the ETRO changes specifically
 - Thoughts on the future of George Street

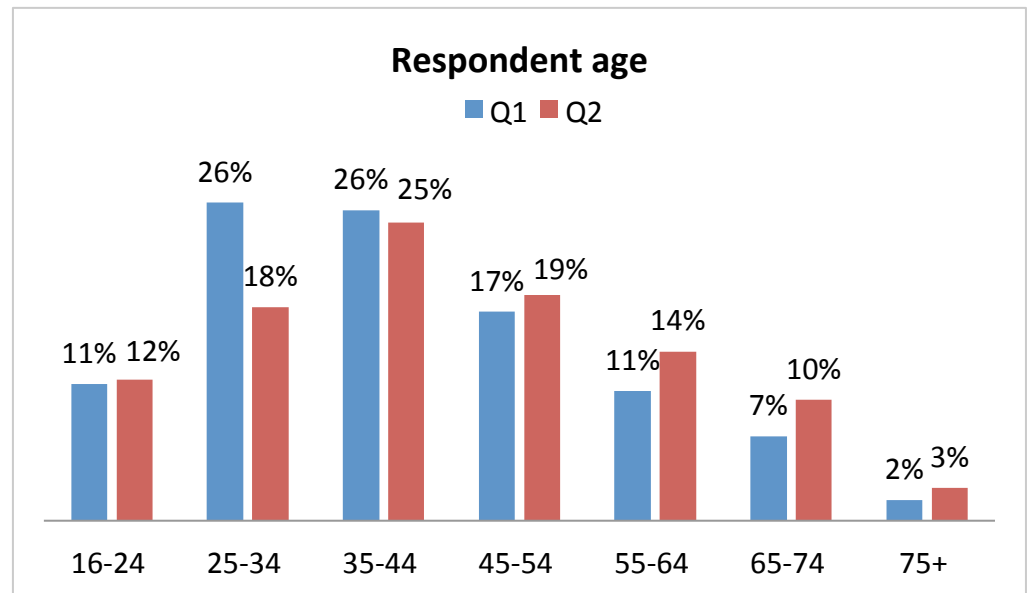
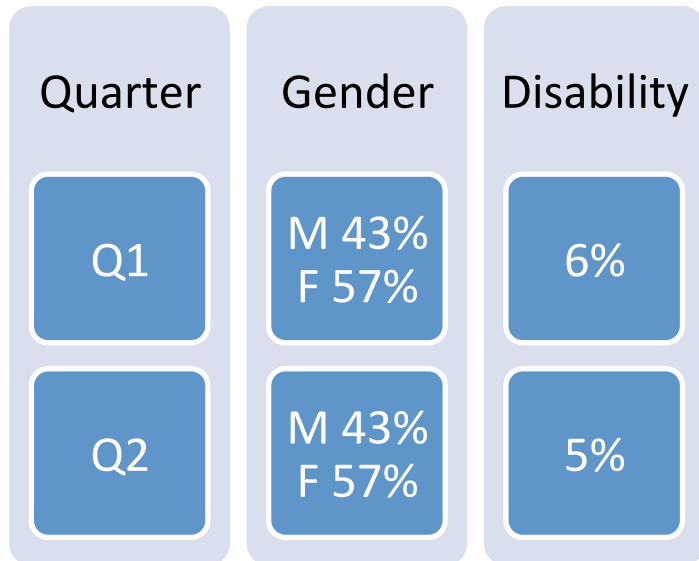
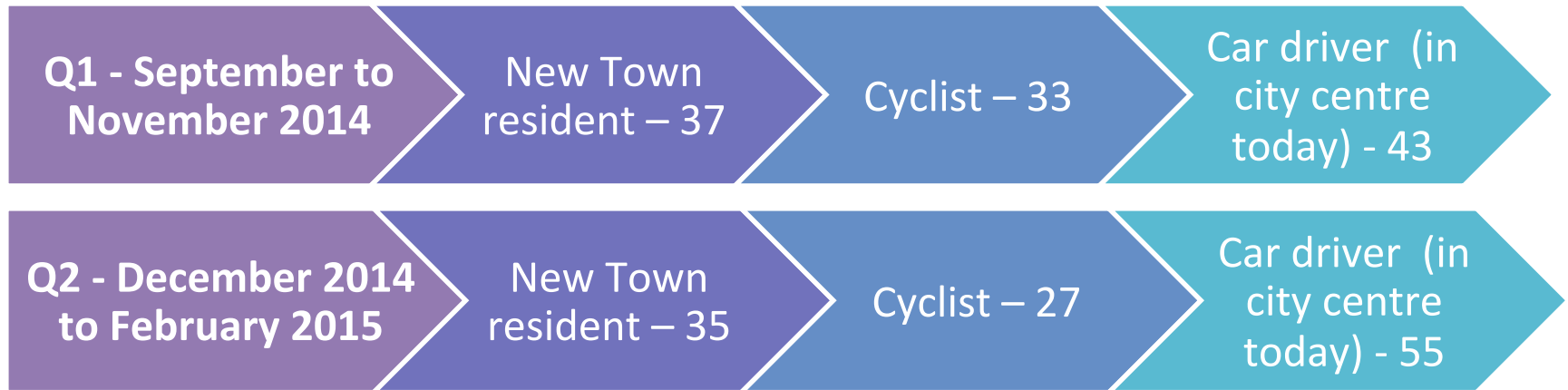
Survey

- 100 interviews completed each month
- Interviews spread across days of the week (including weekends), times of the day (including evenings) and across all 4 blocks of George Street
- Respondents stopped on a 'next to pass' sampling methodology
- Minimum target quotas set for New Town residents, cyclists and drivers

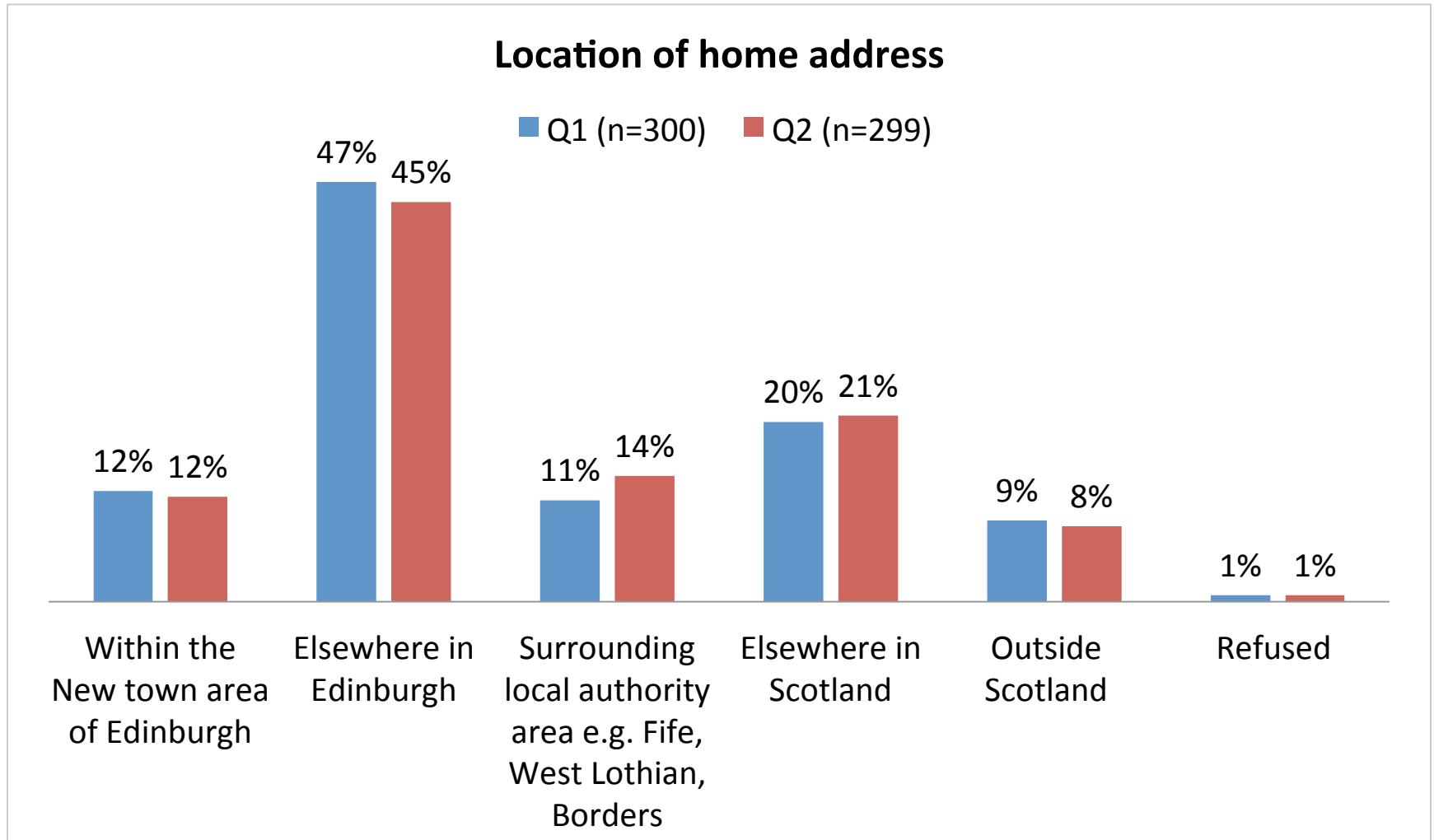
Output

- 300 interviews carried out between September and November 2014
- 299 interviews carried out between December 2014 and February 2015
- Total of 599 interviews to date

Respondent profile (Q1, n=300; Q2, n=299)

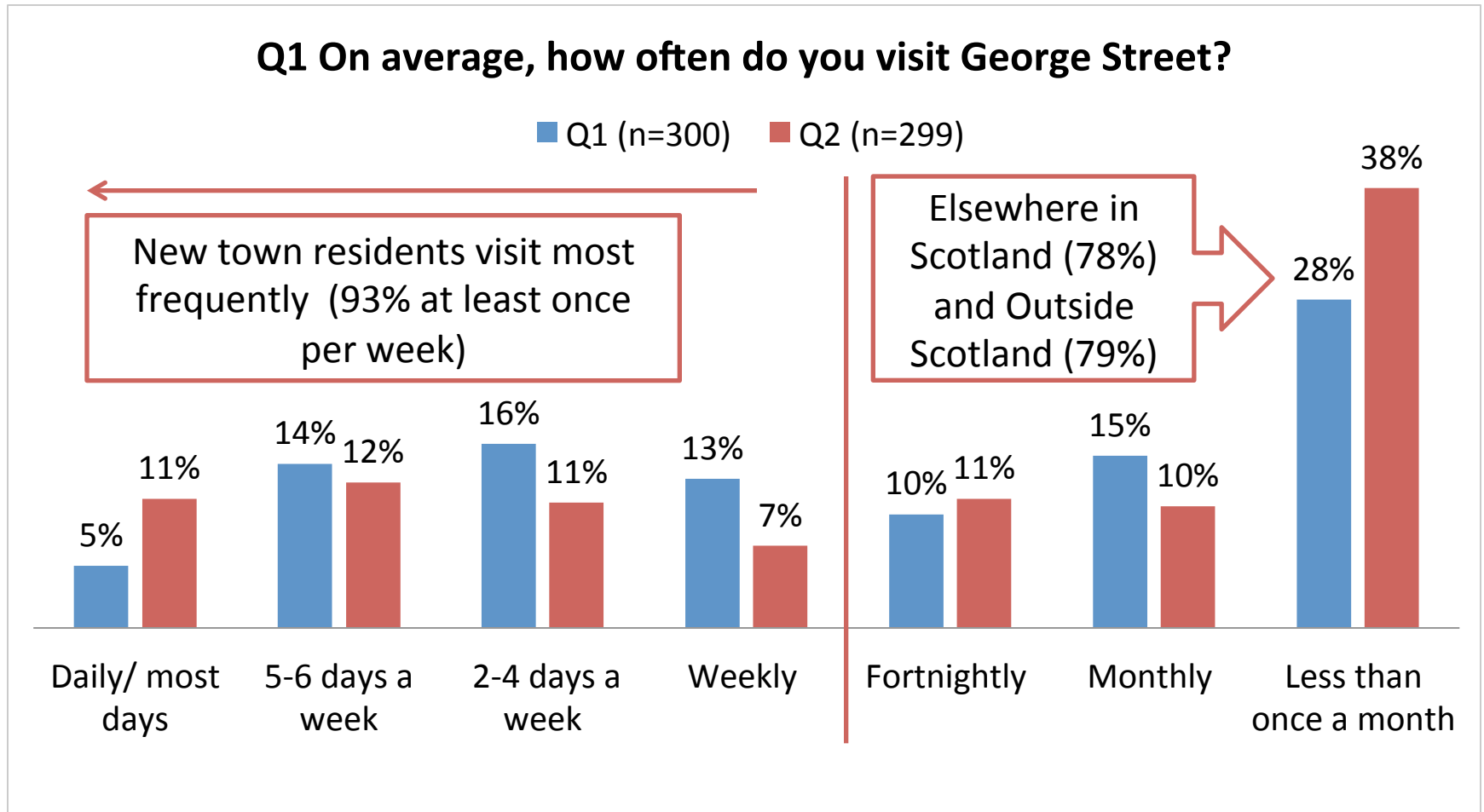


Home location of respondent



Profile of visits

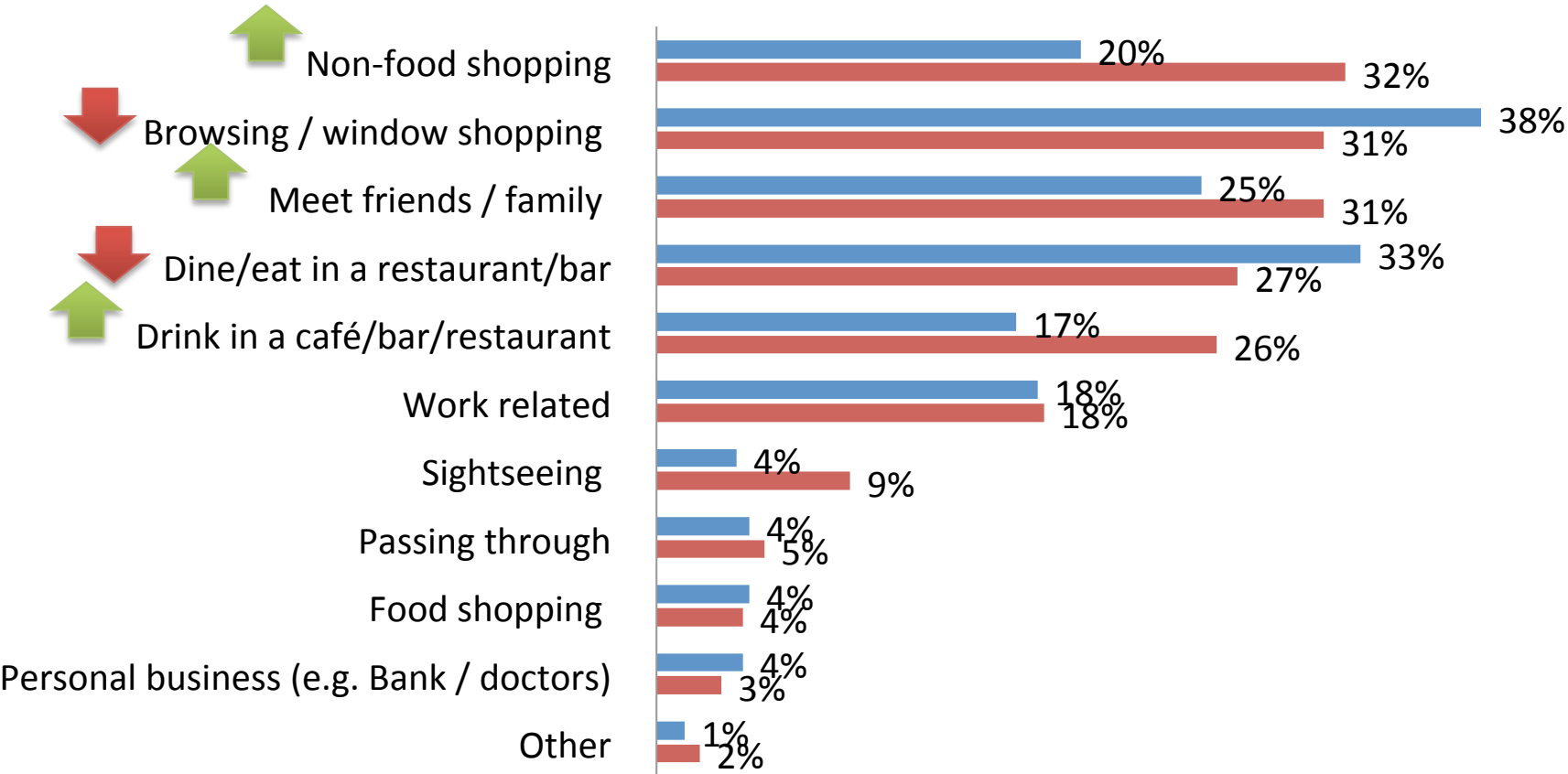
Just under half visit at least once per week



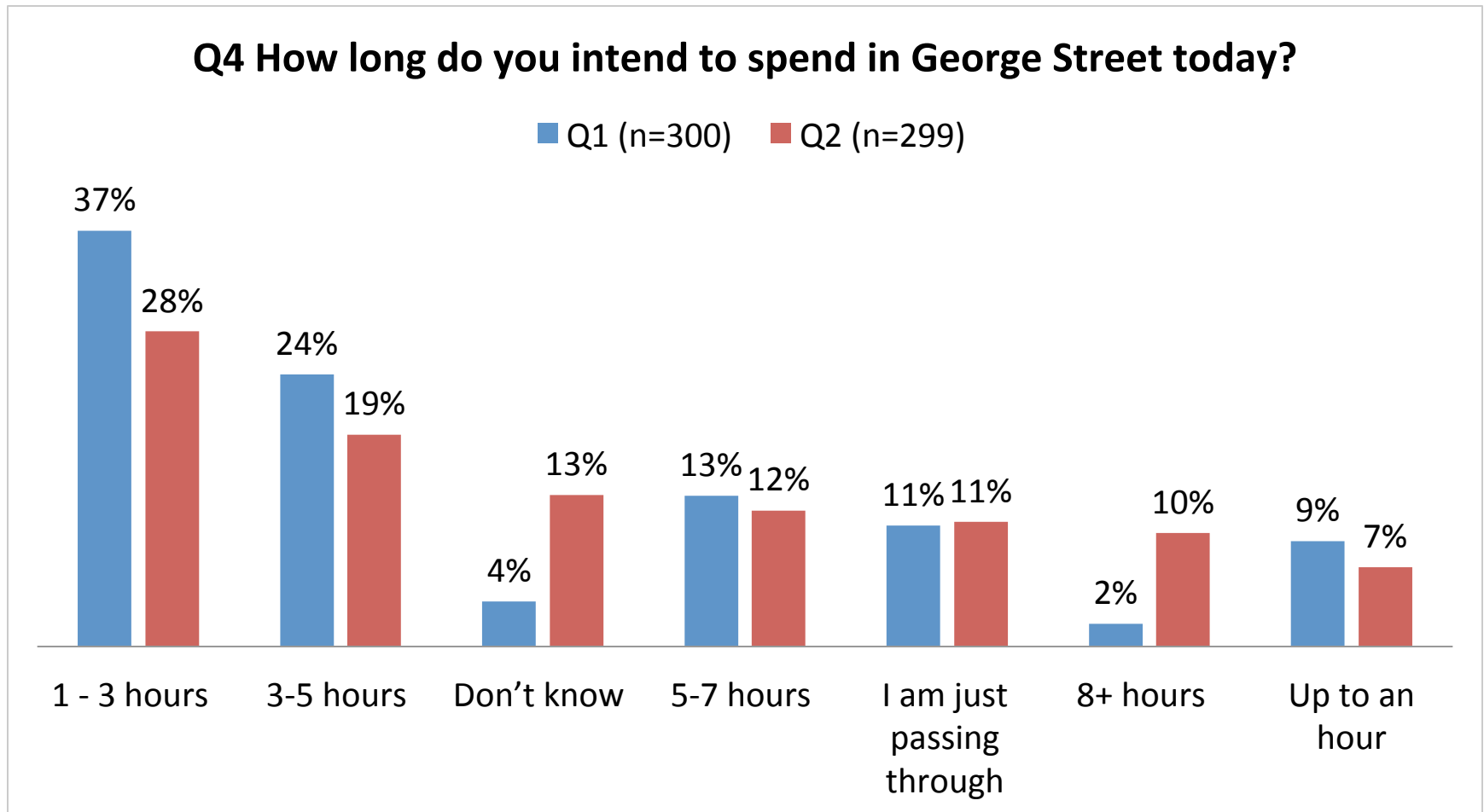
'Non food shopping' has increased as reason for visit, as has 'drink in café/ bar'

Q3 What is the purpose of your visit to George Street today?

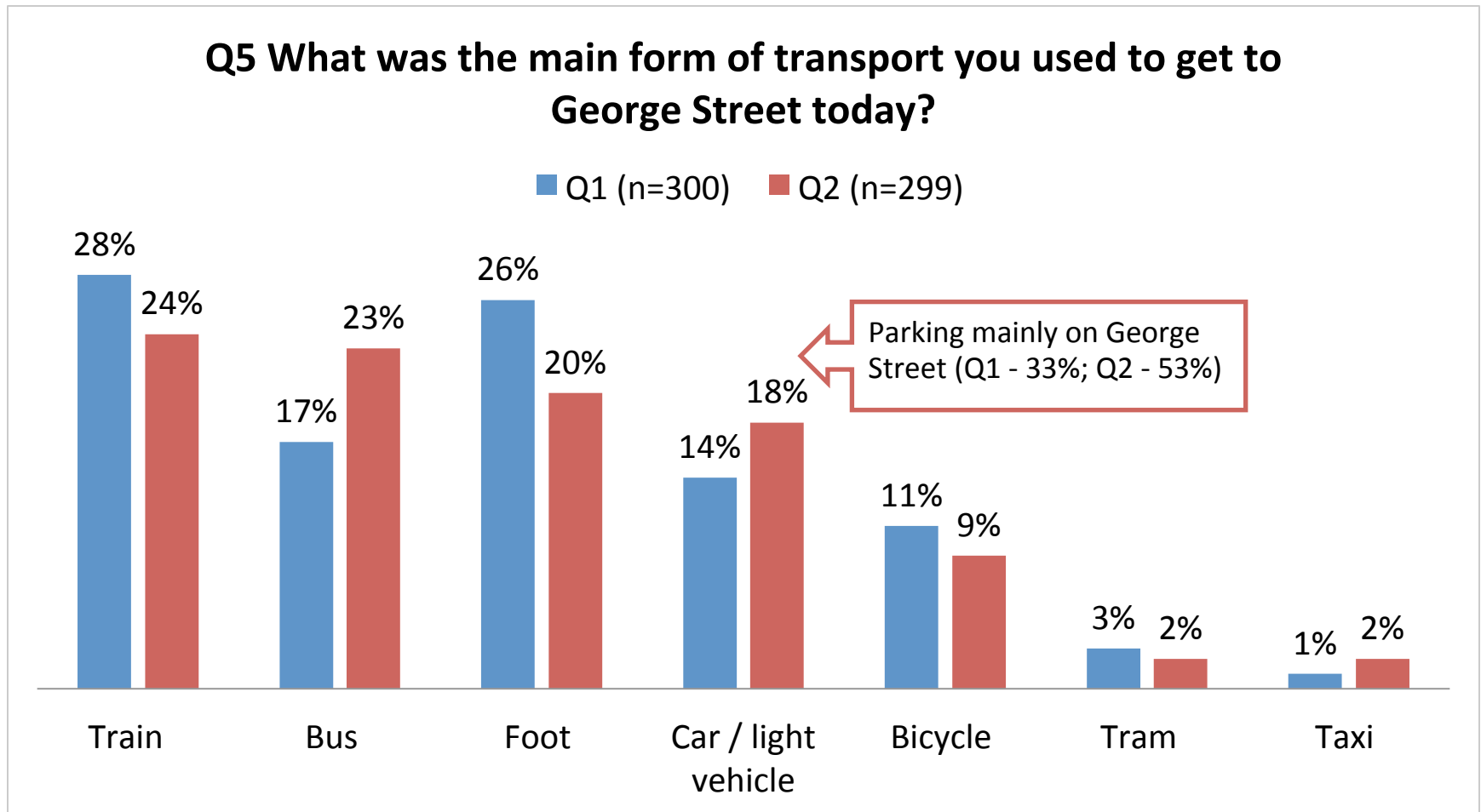
■ Q1 (n=300) ■ Q2 (n=299)



Almost two thirds of visitors stay between 1 and 5 hours



Q2 visitors most likely to travel by train or bus



Perceptions and Experience of George Street

Factors most likely to be 'very important' in decision to come to George Street are fairly consistent

Q1

- Feeling of safety (78%)
- Quality / range of shops/ businesses (78%)
- Cleanliness (71%)
- Overall appearance (57%)

Q2

- Feeling of safety (74%)
- Quality/ range of shops/ businesses (72%)
- Cleanliness (60%)
- Overall appearance (55%)

Greatest change

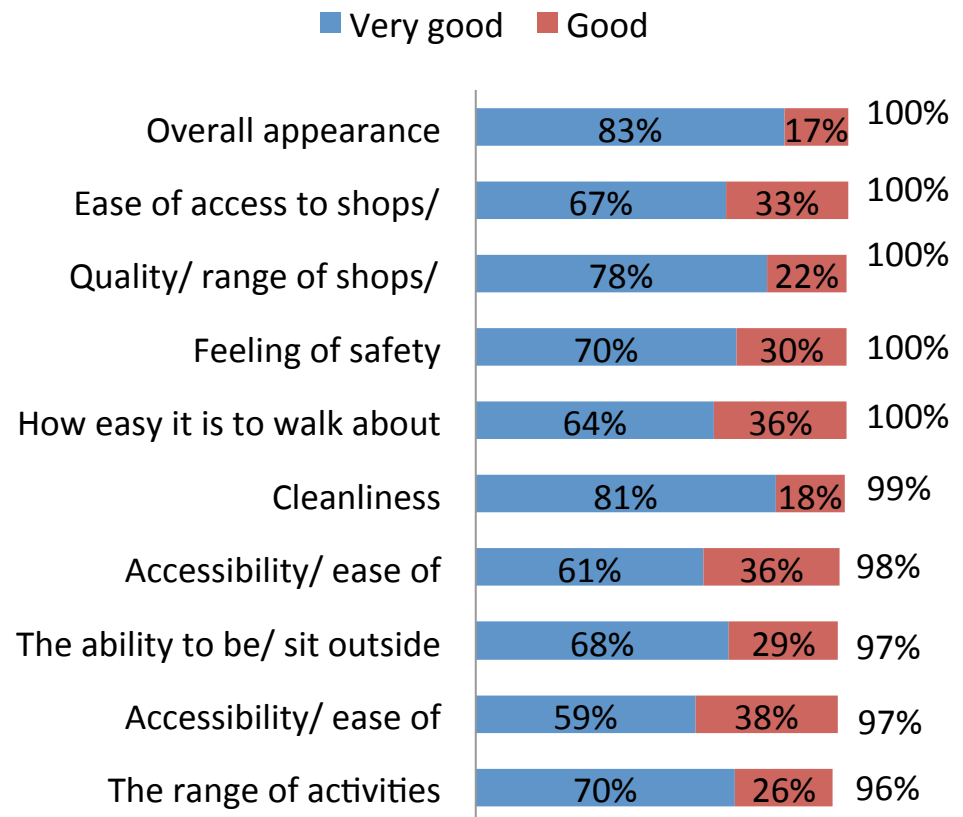
- Clarity of segregation between cycle and pedestrian areas
- 66% Q1
- 22% Q2
- Decrease of 44% points

Overall rating of George Street still high overall but visitors less likely to state 'very good'

Q2 - Most highly rated aspects of George Street



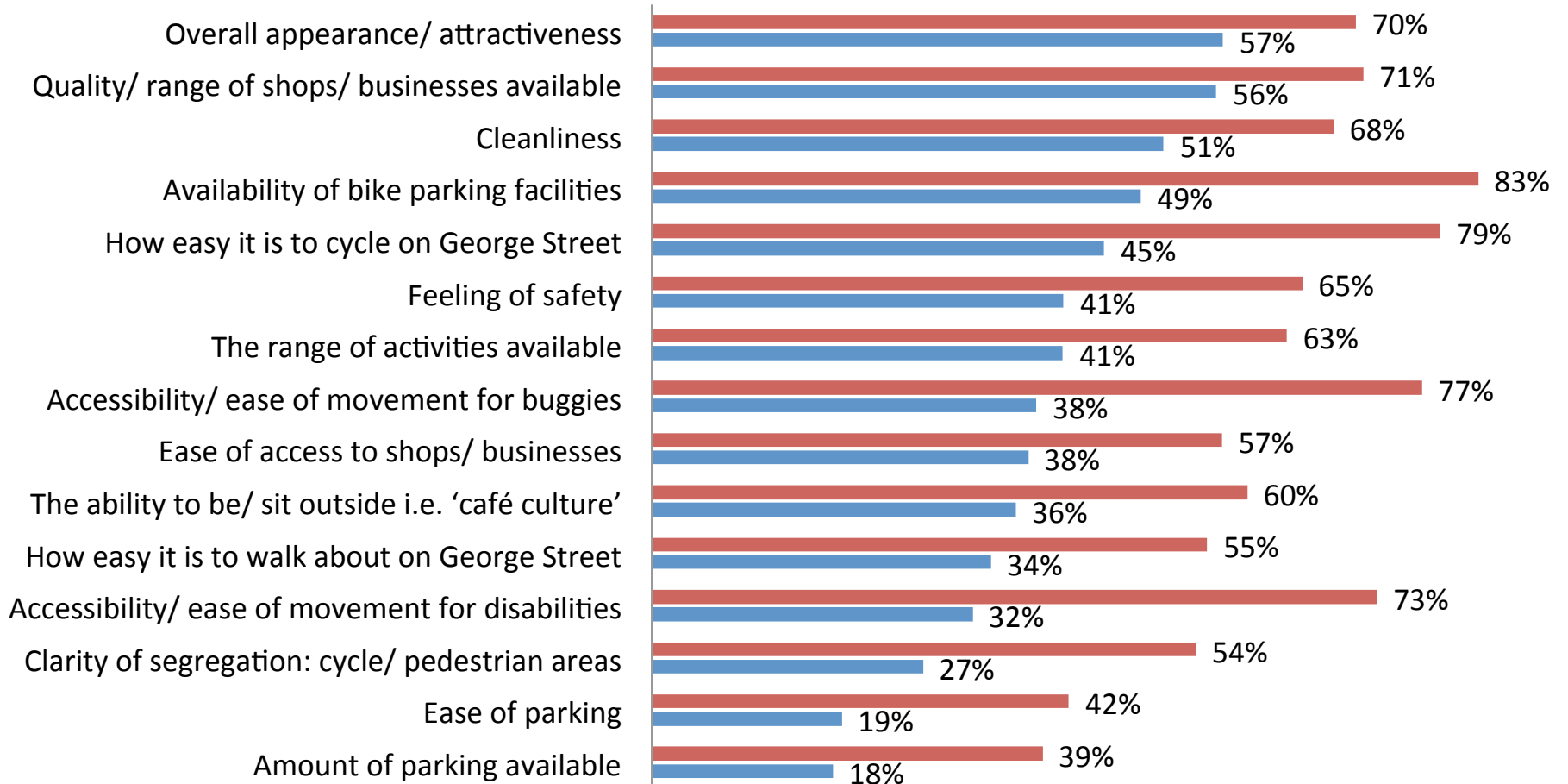
Q1 - Most highly rated aspects of George Street



Views on George Street: Edinburgh residents vs others

% of respondents rating of aspects of George Street as 'very good'

■ Outside Edinburgh (n=269) ■ Edinburgh residents (n=276)



GAP Analysis of George Street

Priority for action



- Feeling of safety
- Ease of access to shops/businesses
- How easy it is to walk about on George Street

Consider for action



- Clarity of segregation between cycle and pedestrian areas (cyclists)
- Availability of bike parking facilities (cyclists)
- Ease of cycling (cyclists)
- Amount of parking available (drivers)
- Ease of parking (drivers)

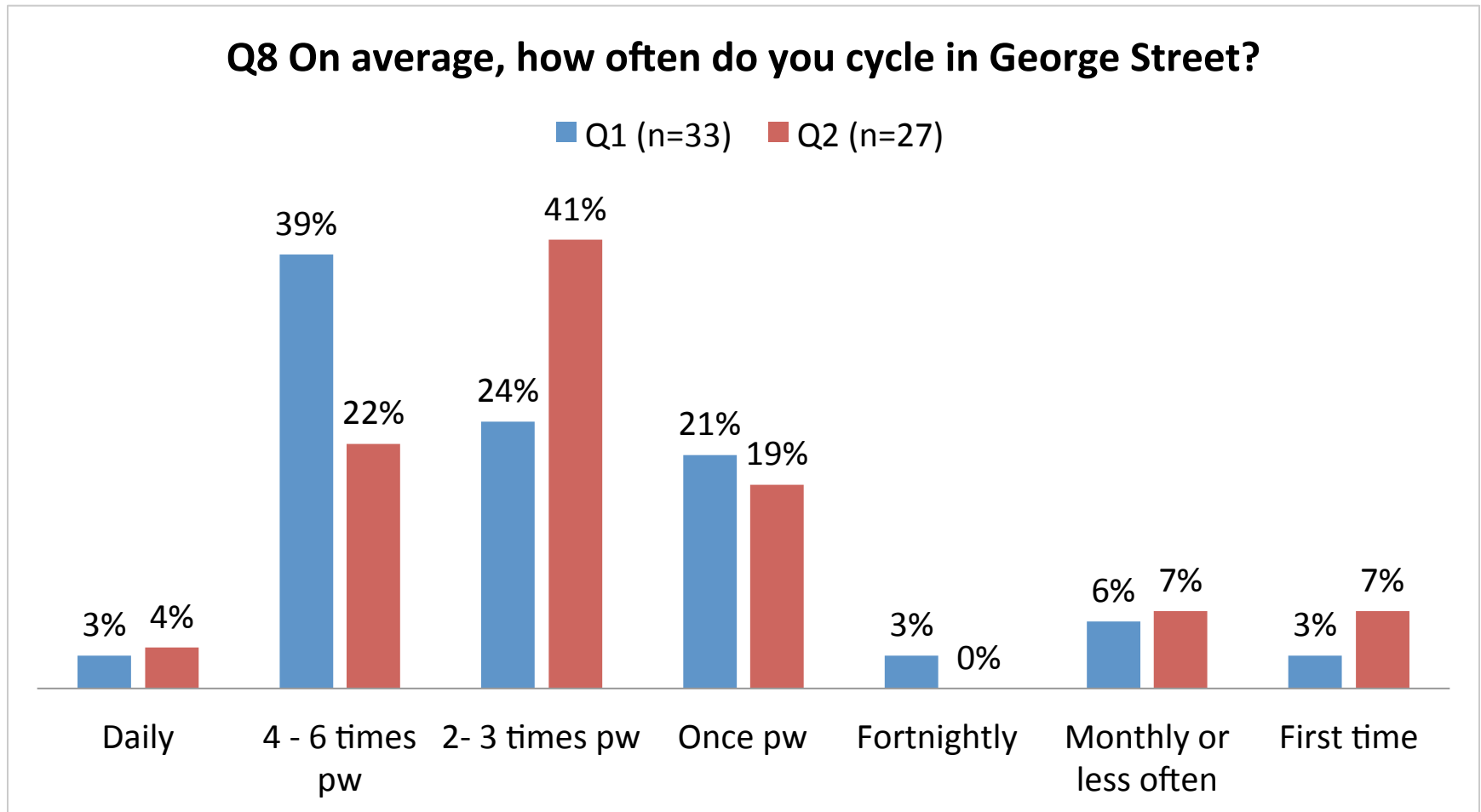
Maintain



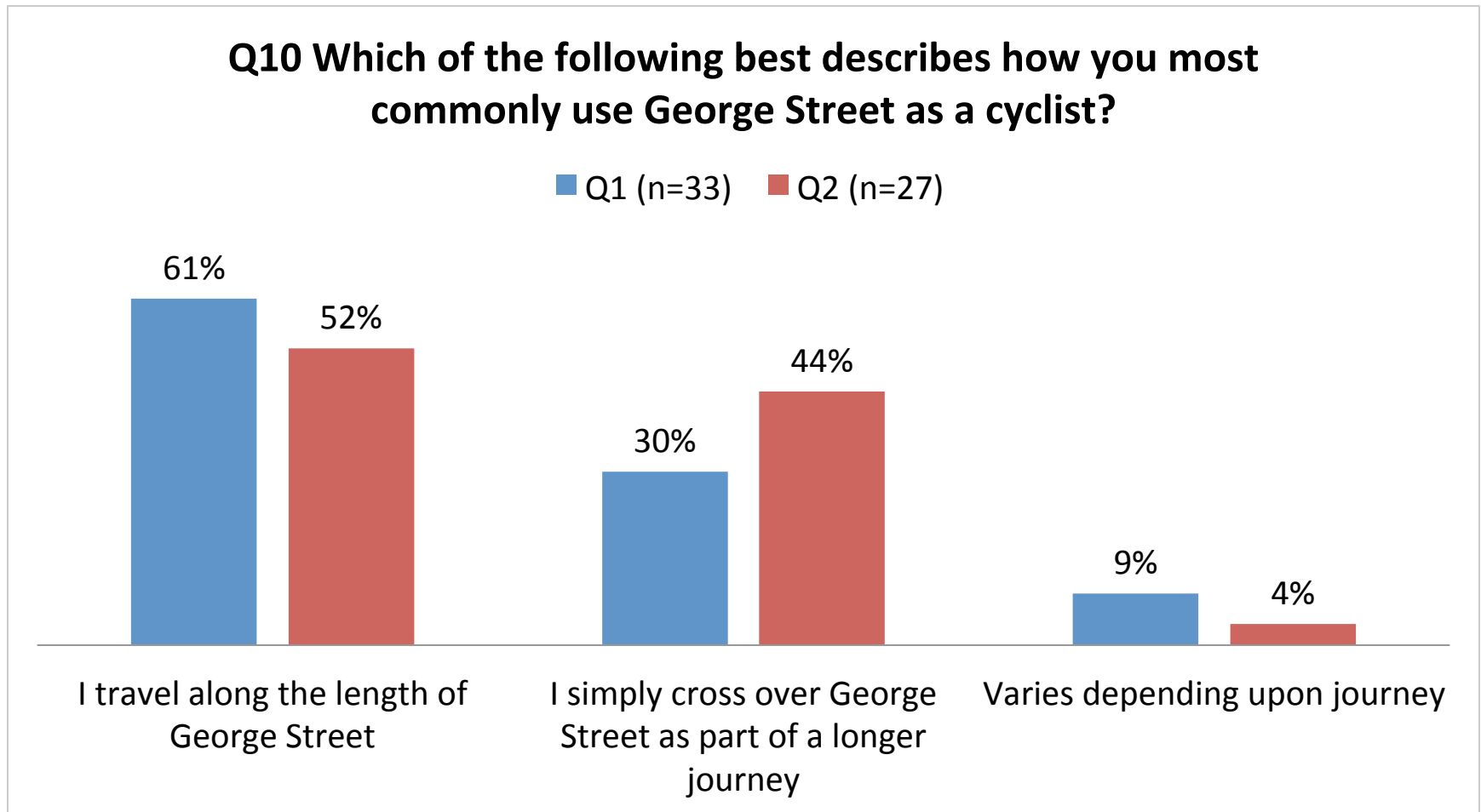
- Overall appearance/attractiveness
- Range of activities available

Cyclist Experience

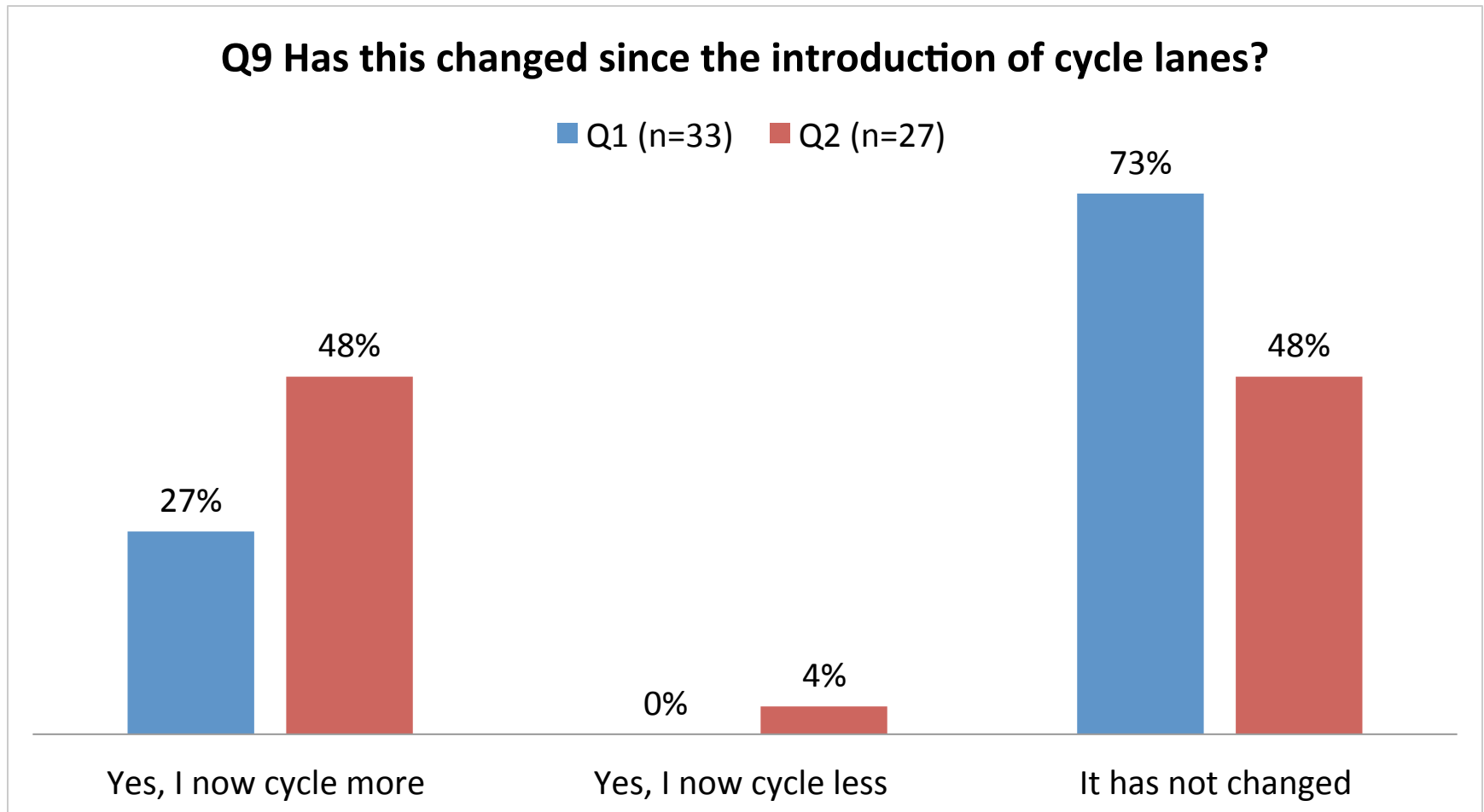
Cyclists tend to cycle in George Street regularly – just under 9 in 10 cycle at least once per week



The majority travel along the length of George Street

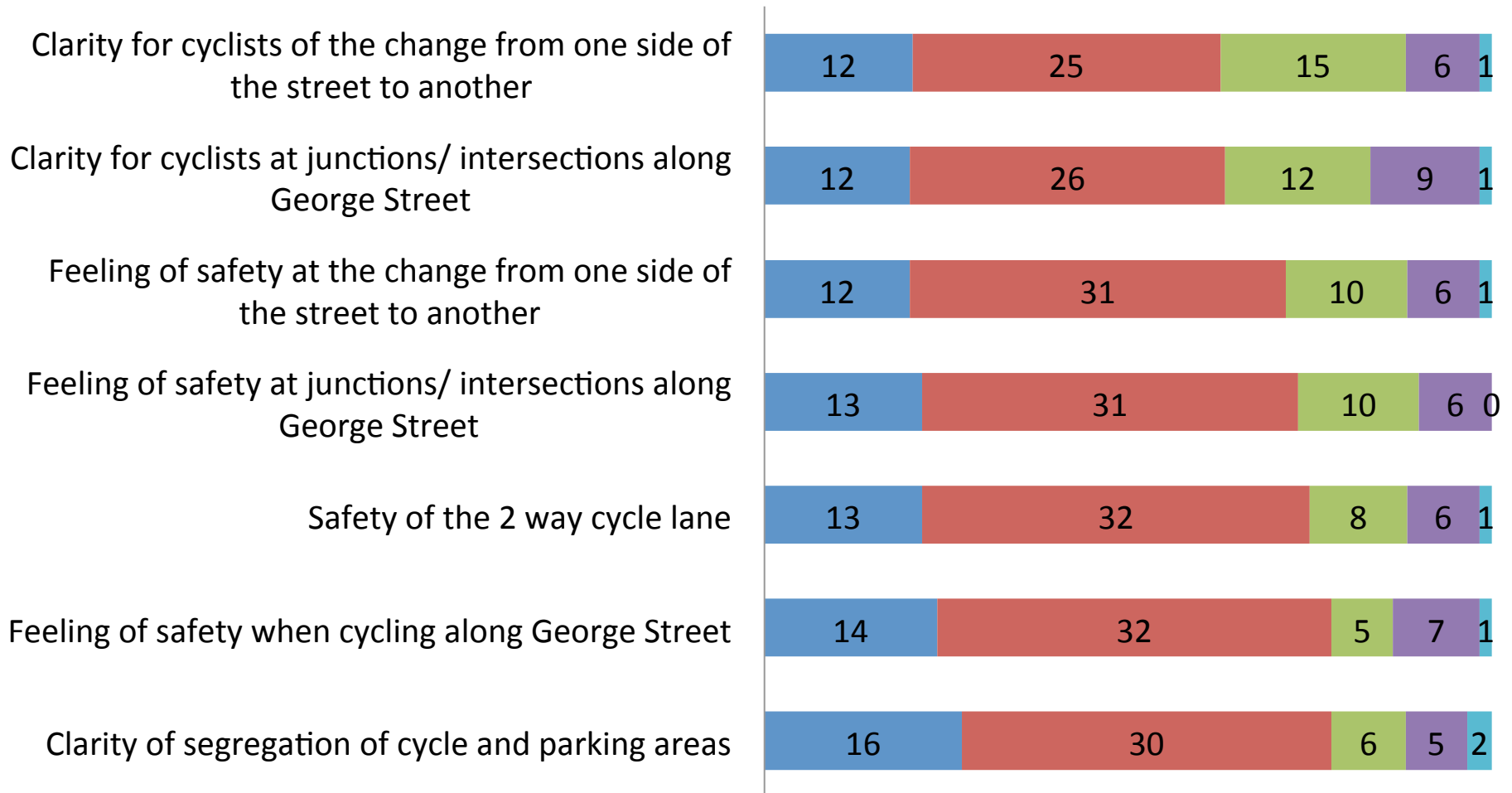


In Q2, cyclists more likely to say they now cycle more often



Q11 How good or poor are the following for cyclists in George Street? (Base: cyclists, n=60)

■ Very good
 ■ Good
 ■ Neither / nor
 ■ Poor
 ■ Very Poor



Cyclist comments

You don't feel safe when cycling at times because people walk over the lanes crossing over to the other side of the street.

Need cycle signs. No one takes notice of lanes. Crossing over at a busy roundabout makes no sense at all and its not safe for drivers.

It took me a while to be comfortable cycling on George Street but I find it easier now I know what I am doing

I brought my bike today because it's good to cycle in Edinburgh compared to other places (all over Edinburgh).

Lanes are a little tight and too close to outside seating cafes. I don't cross over lanes, I just stay on the one lane all the way down.

It's much better to be able to cycle but the clarity of lanes could be better. Not as good as other cycle paths.

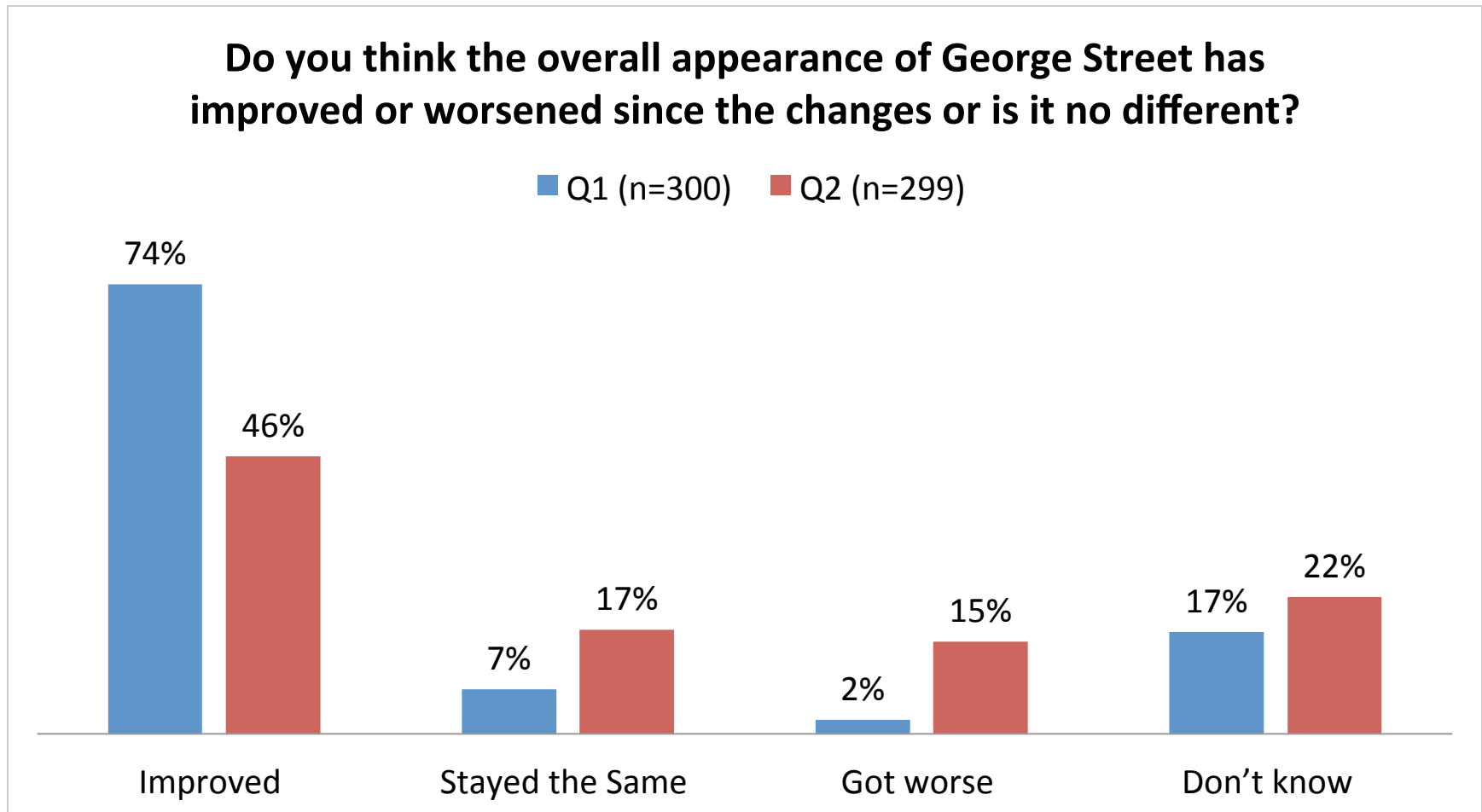
Perceptions of Change in George Street

Perception of change in George Street

‘A number of changes have been made to George Street on a trial basis including increased pedestrian space, a two way cycle path and a one way traffic system on George Street. These are currently temporary and are being trialled until September 2015. Overall, how do you think the overall appearance of George Street has improved or worsened since the changes or is it no different? Has it... ‘



Whilst in Q2, the majority still think George Street's appearance has improved, this is not as positive as previously



Respondents gave a range of reasons for perception of improvement

Q14 If improved, why do you say this is the case? (no of comments)	Q1	Q2
Area looking nicer/ more attractive	91	55
Relaxed atmosphere	39	18
More space to walk/ cycle	38	21
More people/ more of a buzz	33	3
Not as much traffic/ less congestion	22	14
Great facilities available e.g. shopping/ restaurants/ bars	20	7
Cosmopolitan atmosphere/ cultured	16	6
Like being able to sit outside	16	10
Can cycle safely/ easier to cycle/ good cycle lanes	13	10
Like the information boards	12	8

Just 7 respondents felt the overall appearance had worsened in Q1, this is now 45 in Q2

Traffic congestion is worse than it was

Too many tailbacks/jams. Takes longer to get here

Lost its character, tents are looking shabby. Place looks unfinished

Outside restaurants are sitting unused and making area look poor. Its taking away from George Street history.

Ruined the look of the street. Obscuring beautiful, cultured buildings.

Causing traffic disruption on side streets.

Too much traffic on Princes Street and Queen Street. Congested these areas instead.

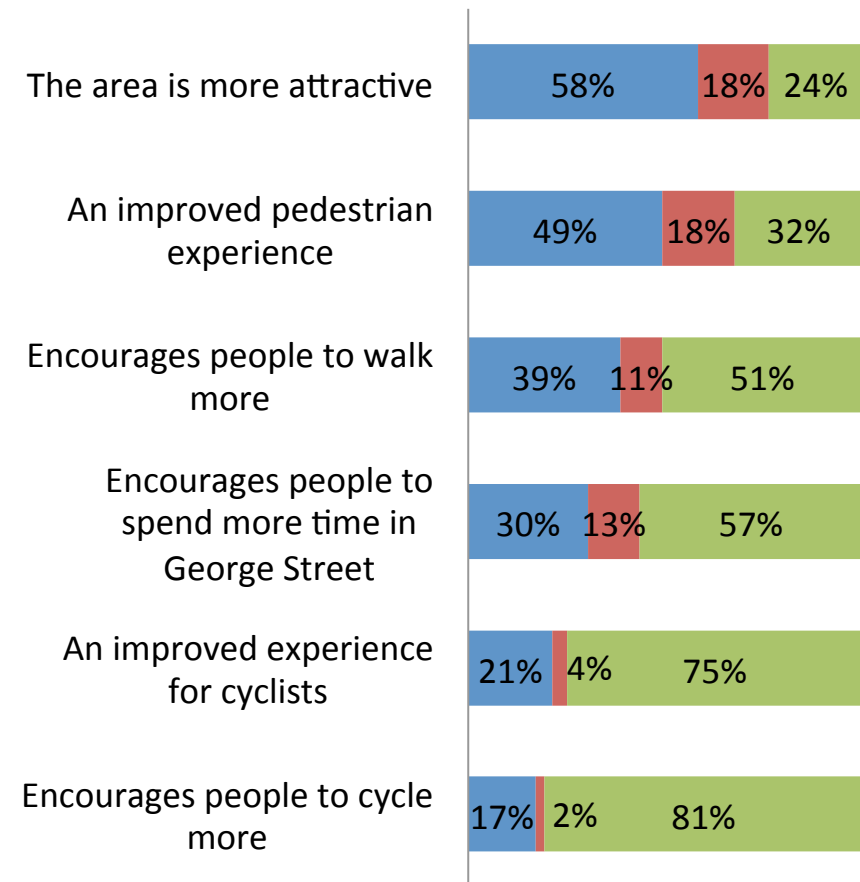
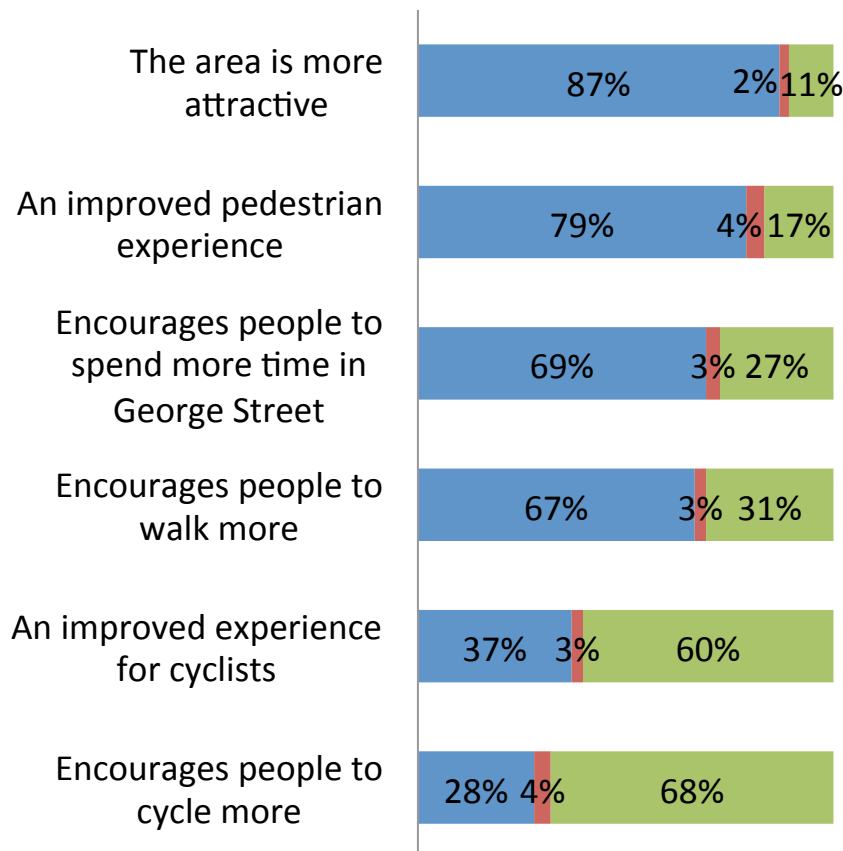
Do you think the changes to George Street have achieved any of the following?

Q1

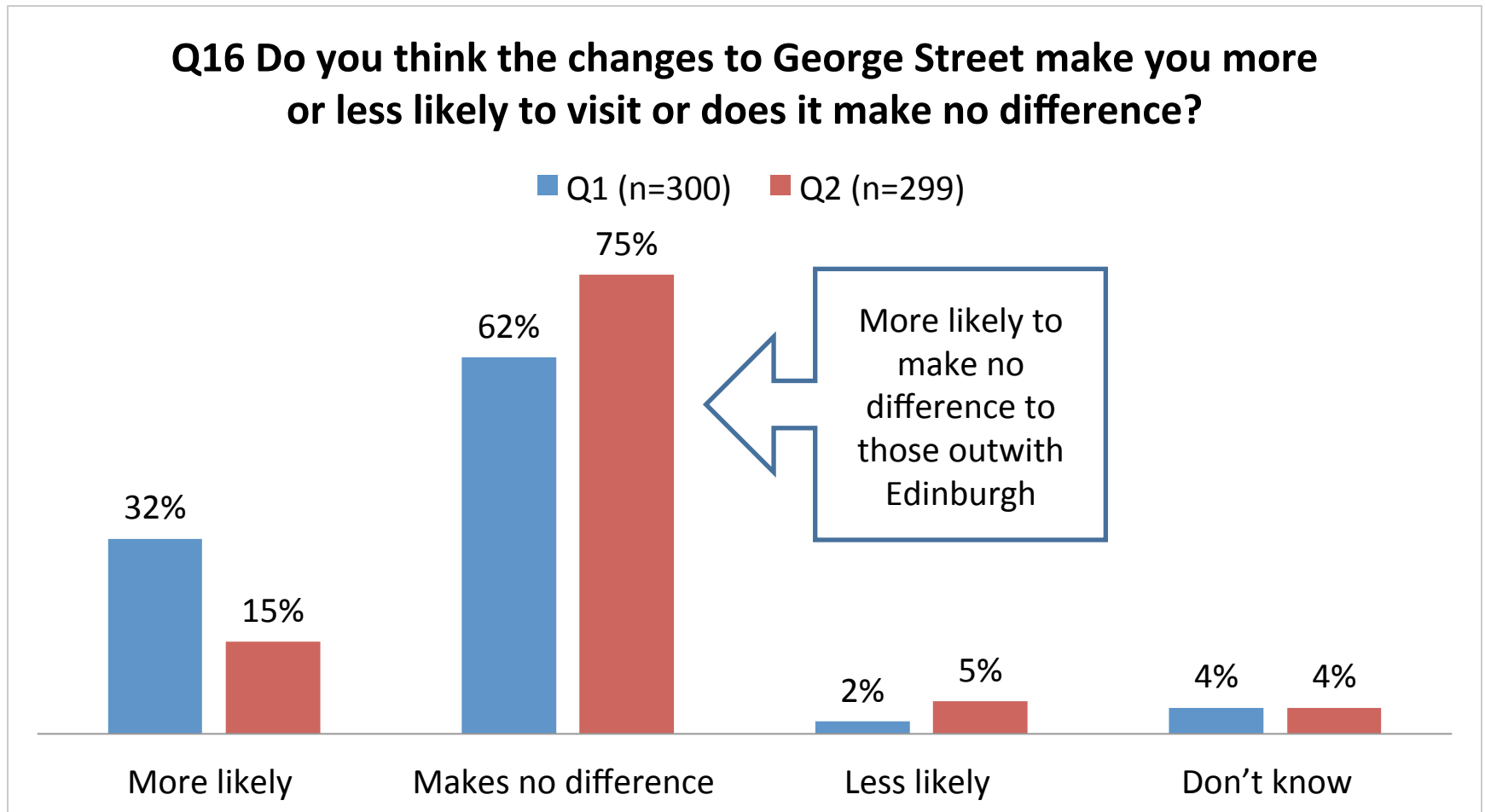
Q2

■ Yes ■ No ■ Don't know

■ Yes ■ No ■ Don't know



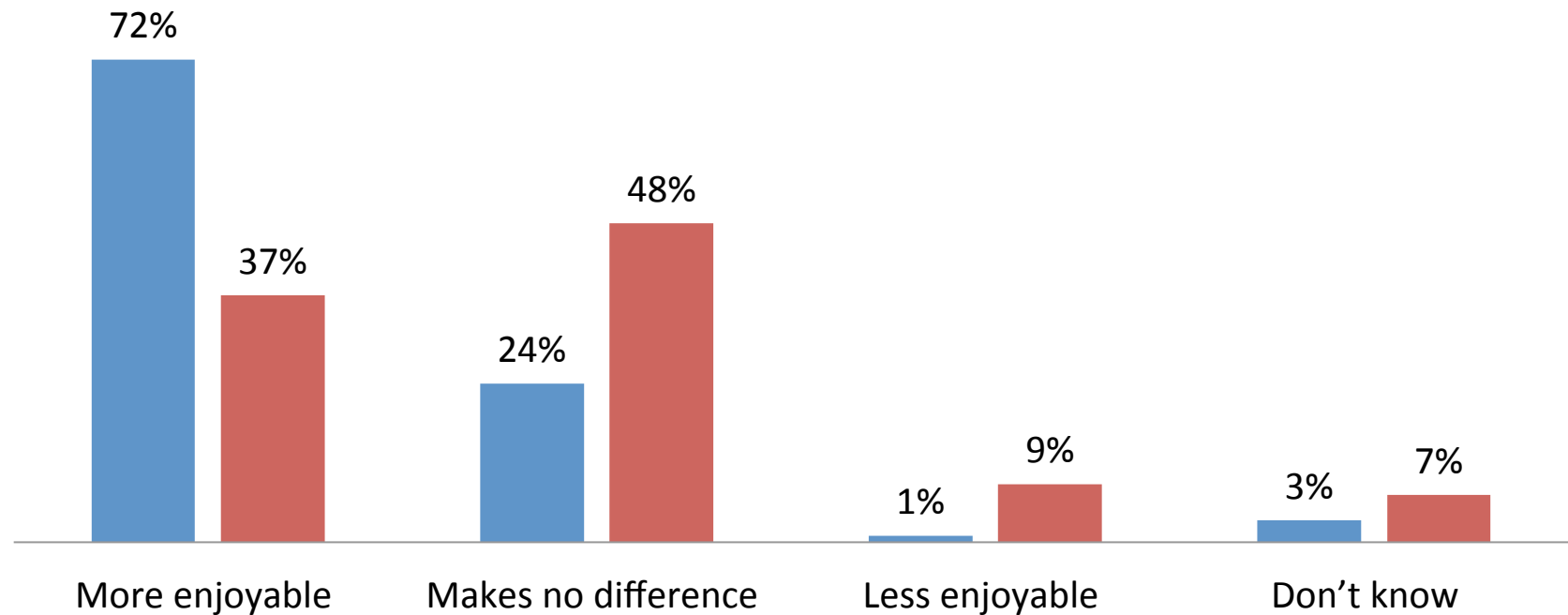
The majority of visitors say they are at least as likely to visit George Street (90%, Q2)



There has been a significant fall between Q1 and Q2 in relation to the extent to which respondents think the changes make their trip more enjoyable

Q17 Do you think the changes to George Street have made your visit today more or less enjoyable or has it made no difference?

■ Q1 (n=300) ■ Q2 (n=299)

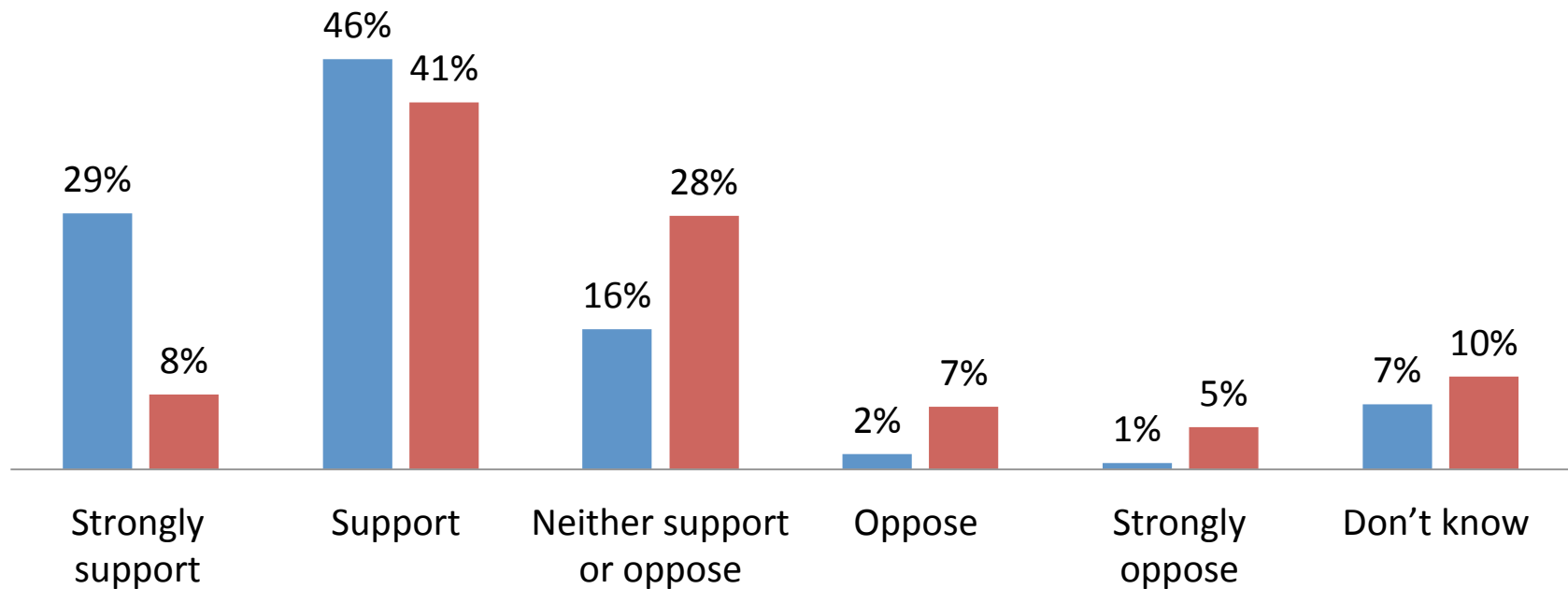


The future of George Street

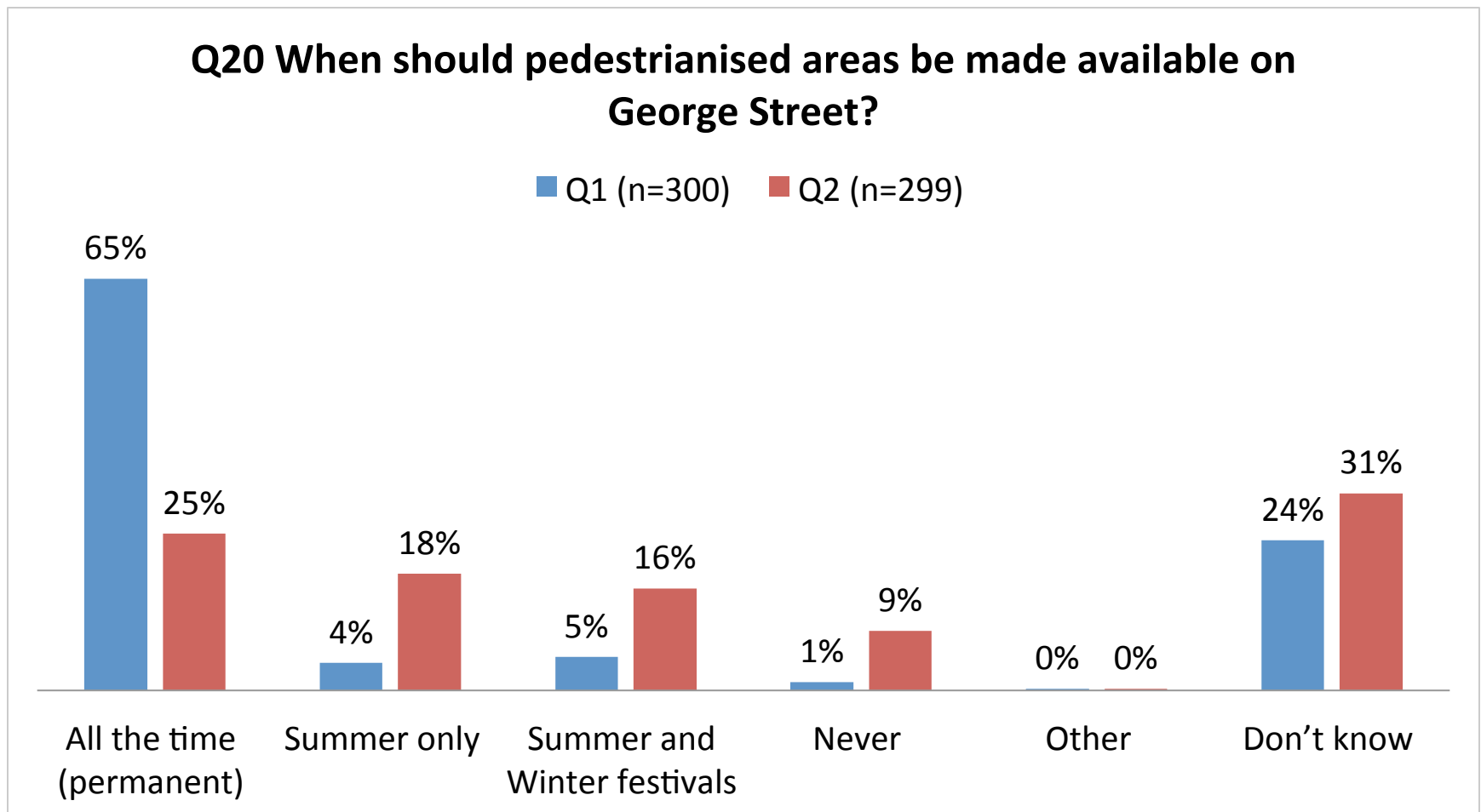
Q2 –12% oppose the idea of introducing pedestrianised spaces on George St (3% Q1)

Q19 To what extent would you support or oppose the idea of introducing pedestrianised spaces on George Street for seating, outdoor dining or cultural activities?

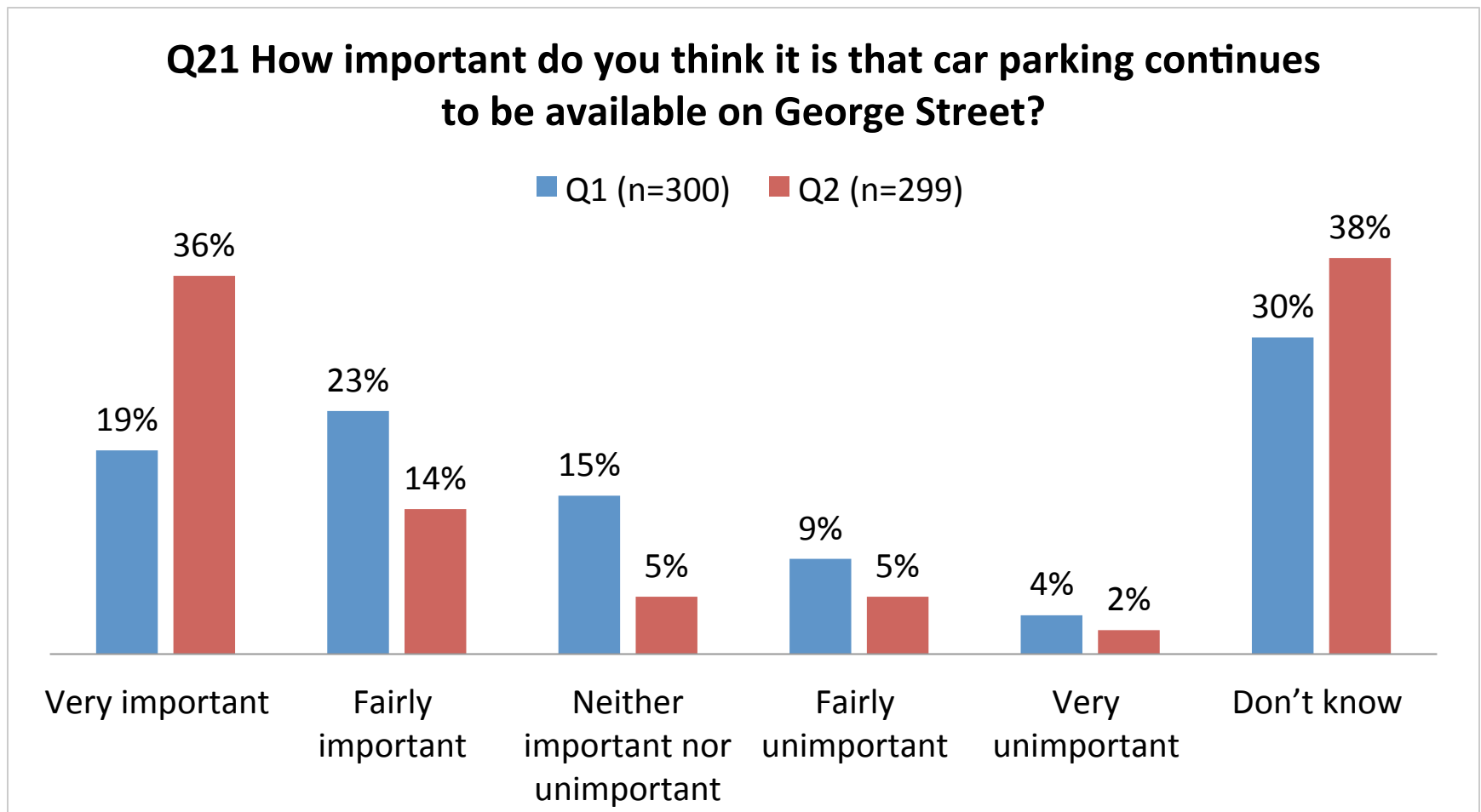
■ Q1 (n=300) ■ Q2 (n=299)



Respondents are now less likely to feel that pedestrianisation should be permanent



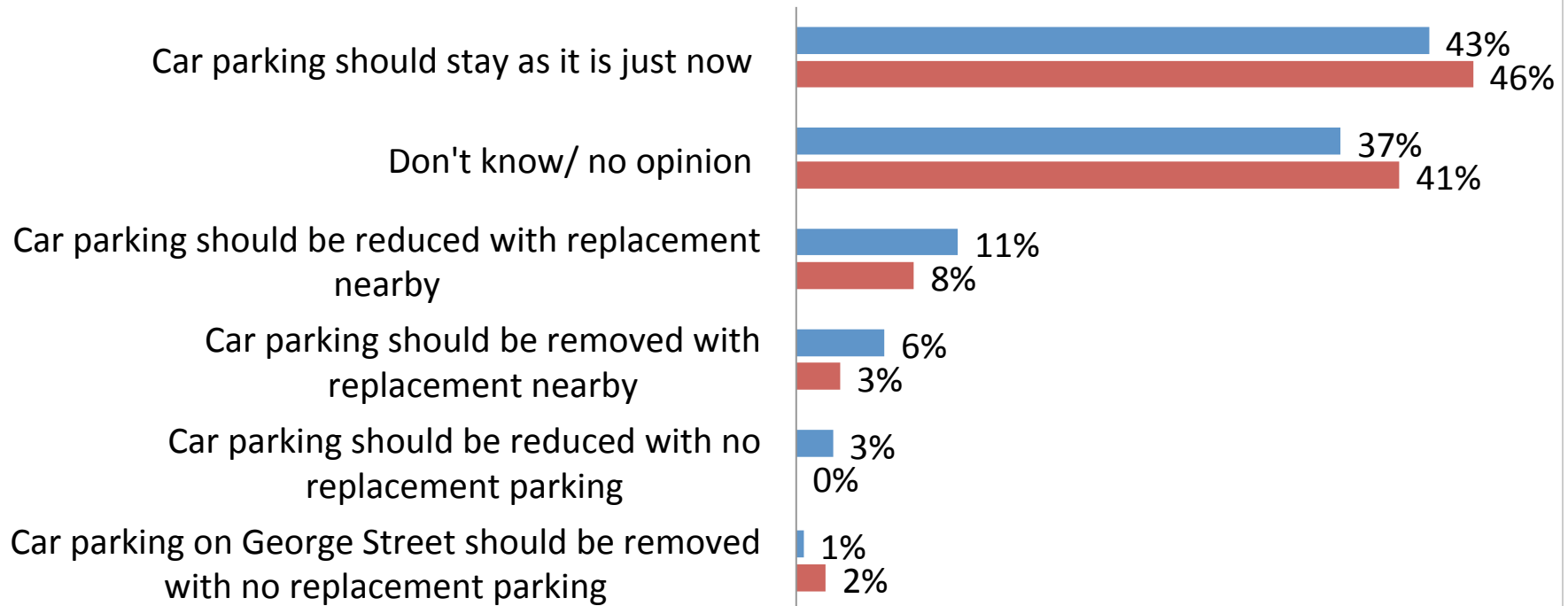
Car drivers much more likely to feel it is important that car parking continues to be available on George Street (88% Q1, 85% Q2)



Car drivers preference is that parking remains as it is (69% Q1, 72% Q2)

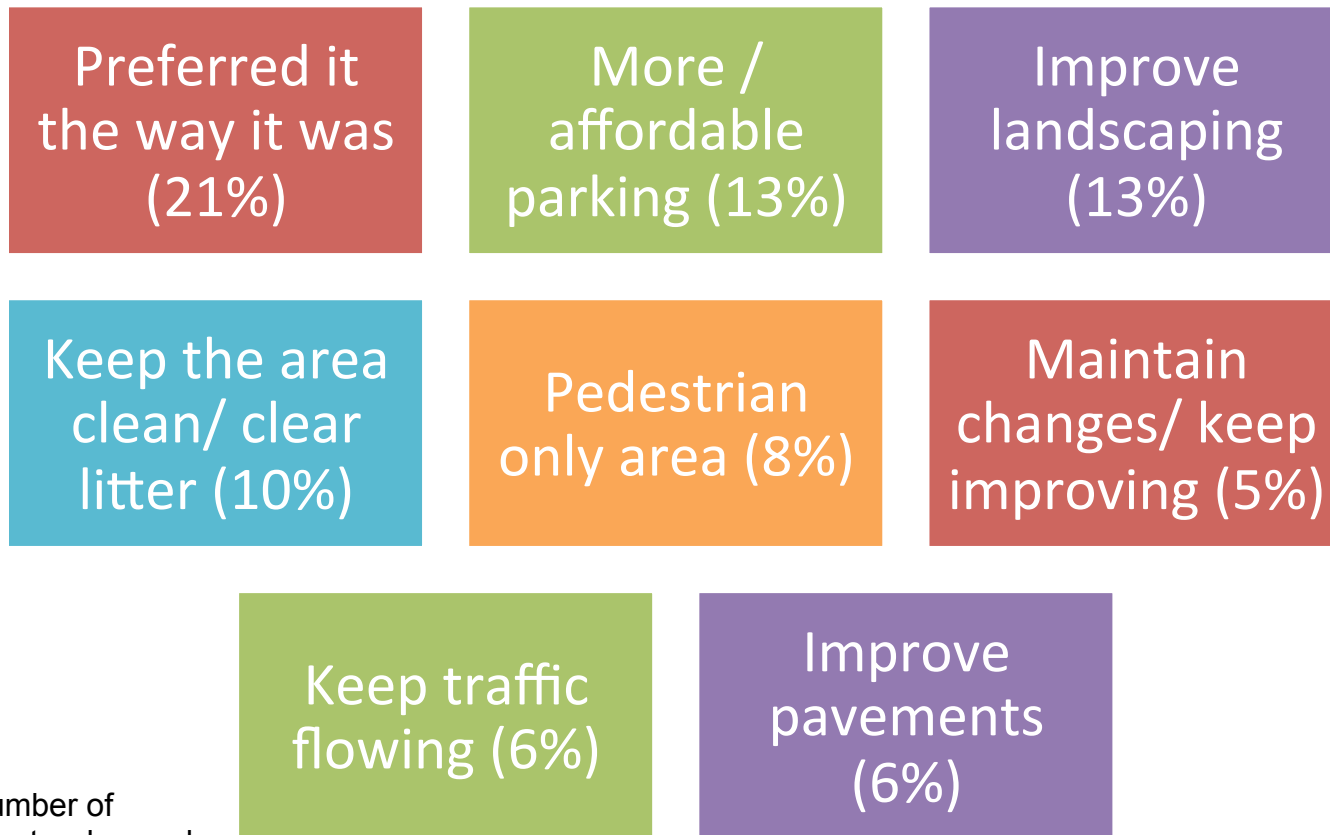
Q22 Thinking about parking in more detail, which of the following comes closest to describing your view?

■ Q1 (n=300) ■ Q2 (n=299)



Suggestions for improvement

- Q2 – 56 % had no suggestions for improvement (67% Q1)
- Of those that did, the most common comments were:



Base: number of respondents who made comment, n=132

Any questions?