



George Street ETRO Visitor Research *Quarter 1 Findings September to November 2014*

Key Findings Presentation
December 2014



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
 - Perceptions of the future of George Street

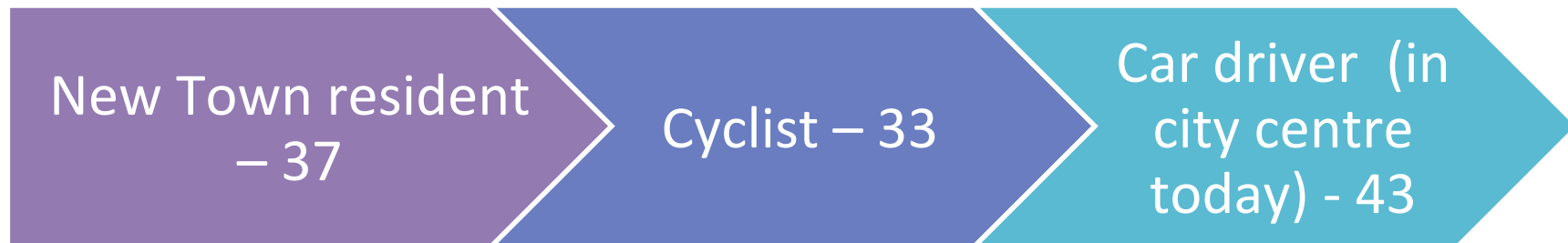
Survey

- 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

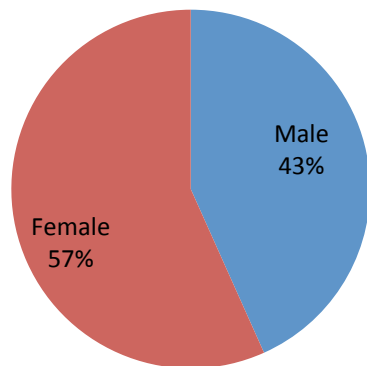
Output

- 300 interviews carried out between September and November 2014

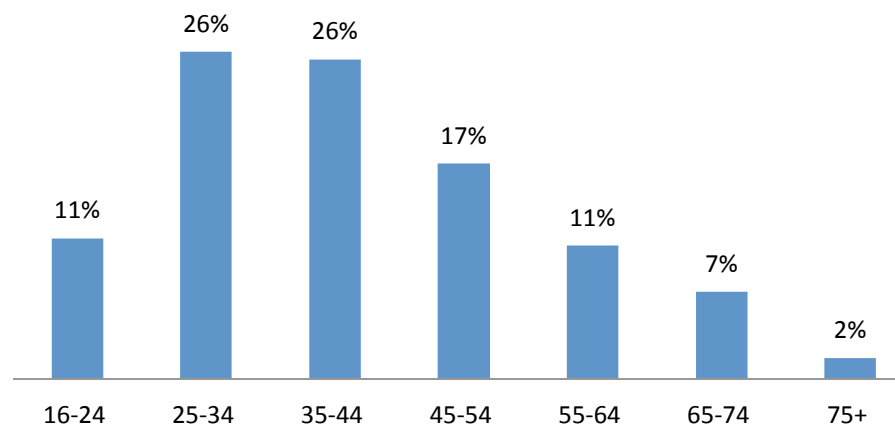
Respondent profile (September – November, n=300)



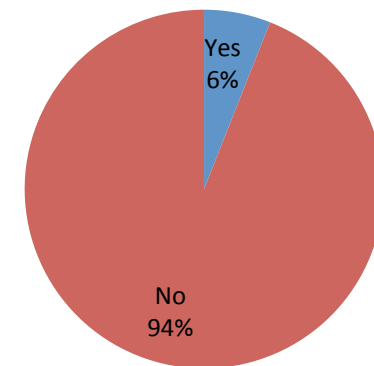
Respondent Gender



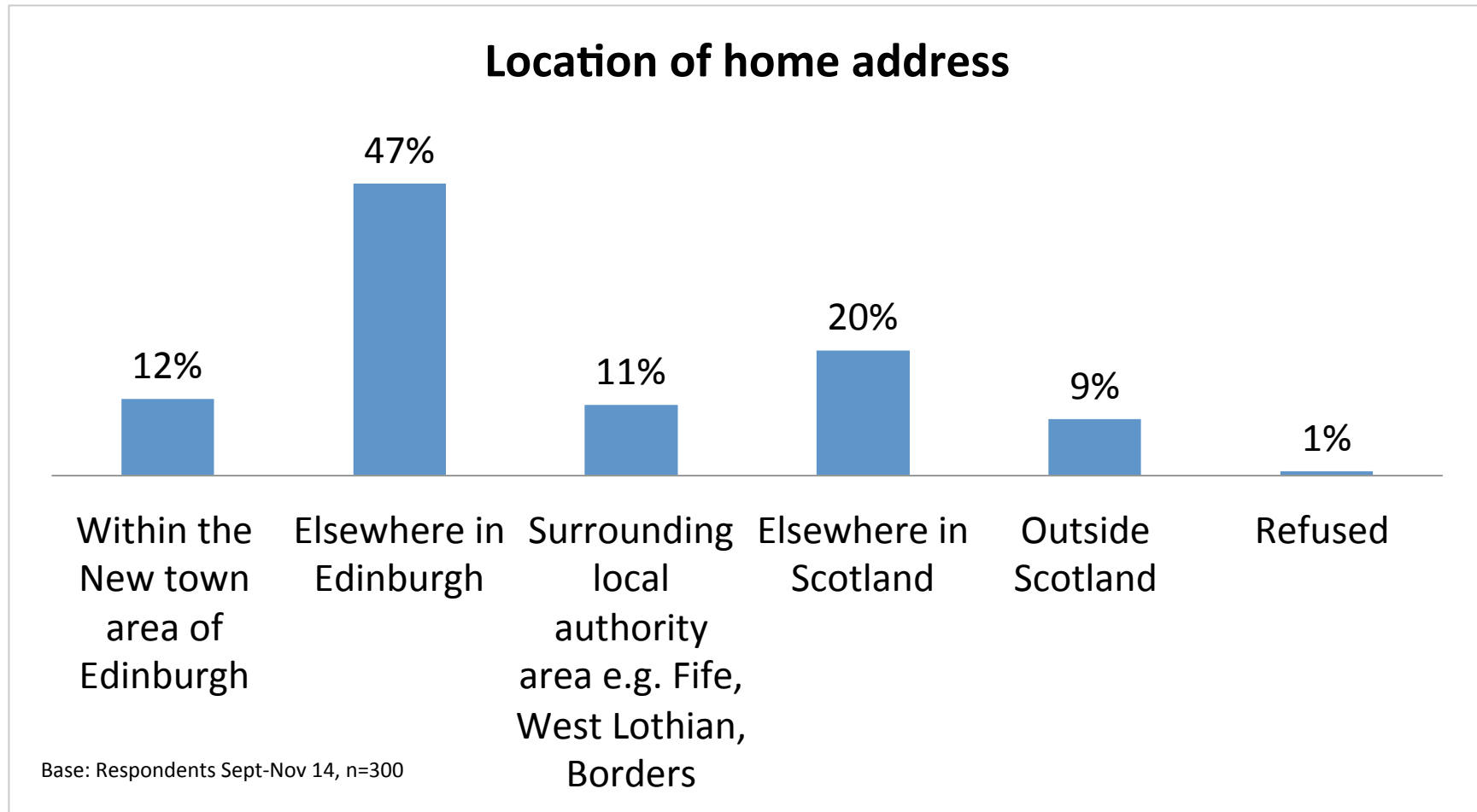
Respondent age



Disability

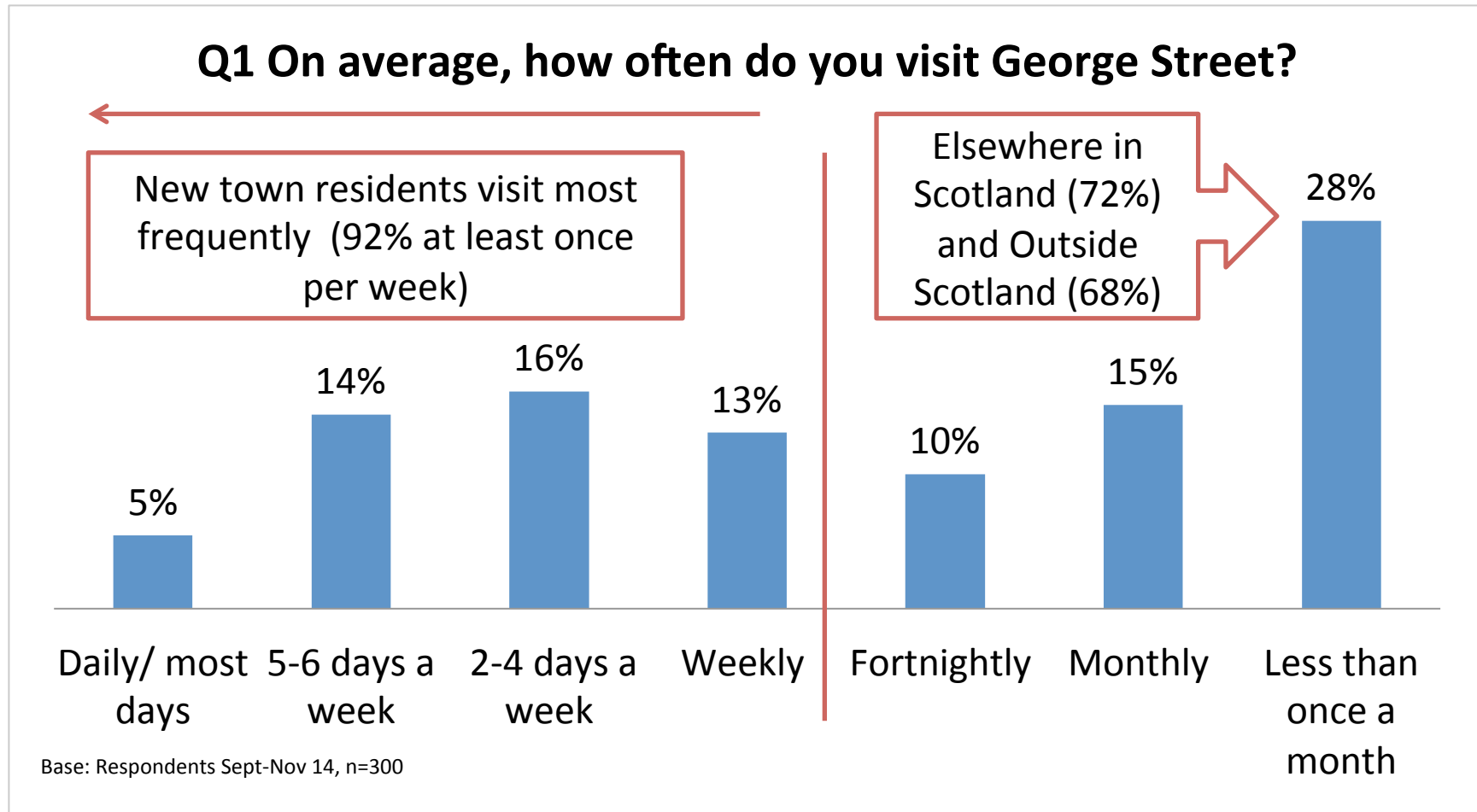


Home location of respondent



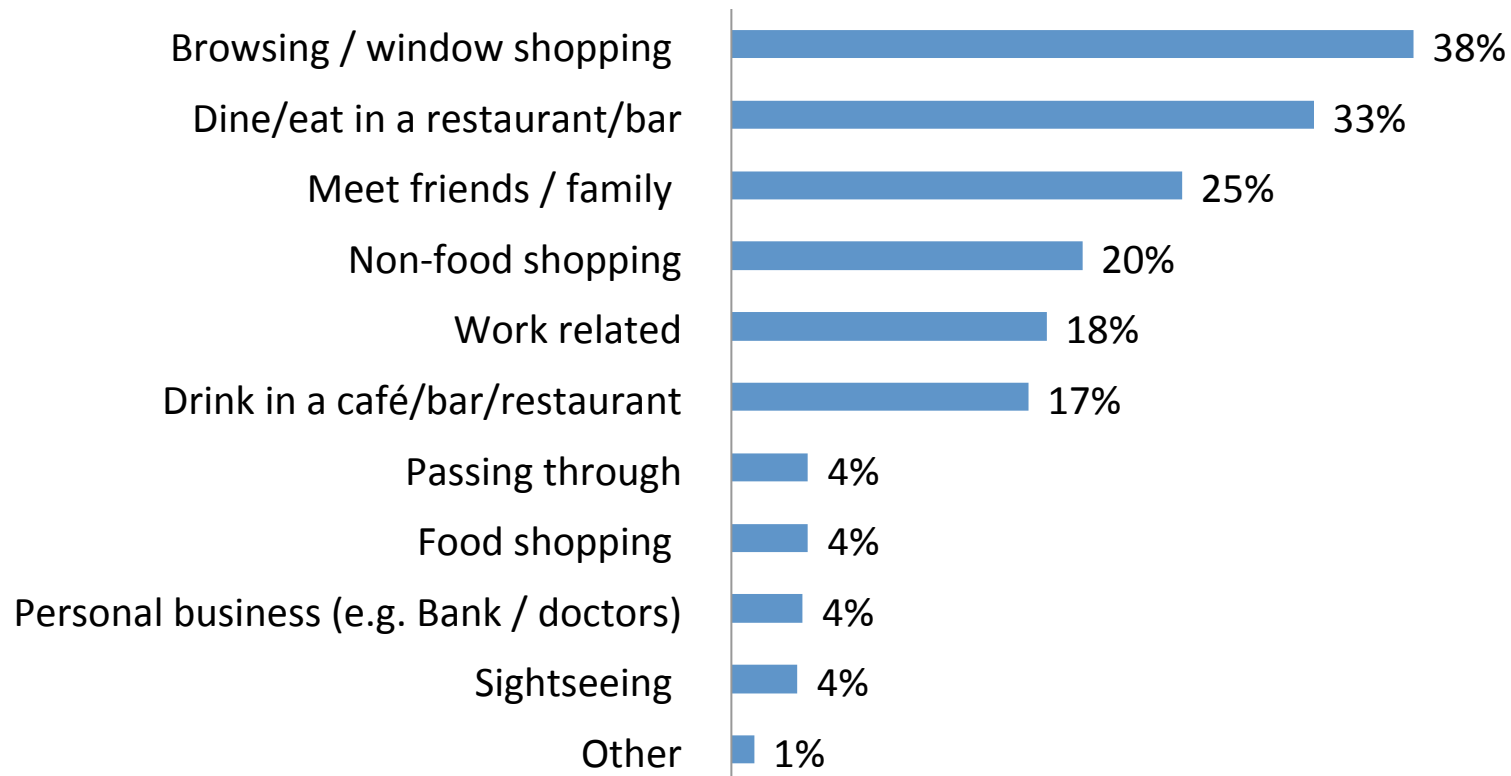
Profile of visits

Almost half visit at least once per week



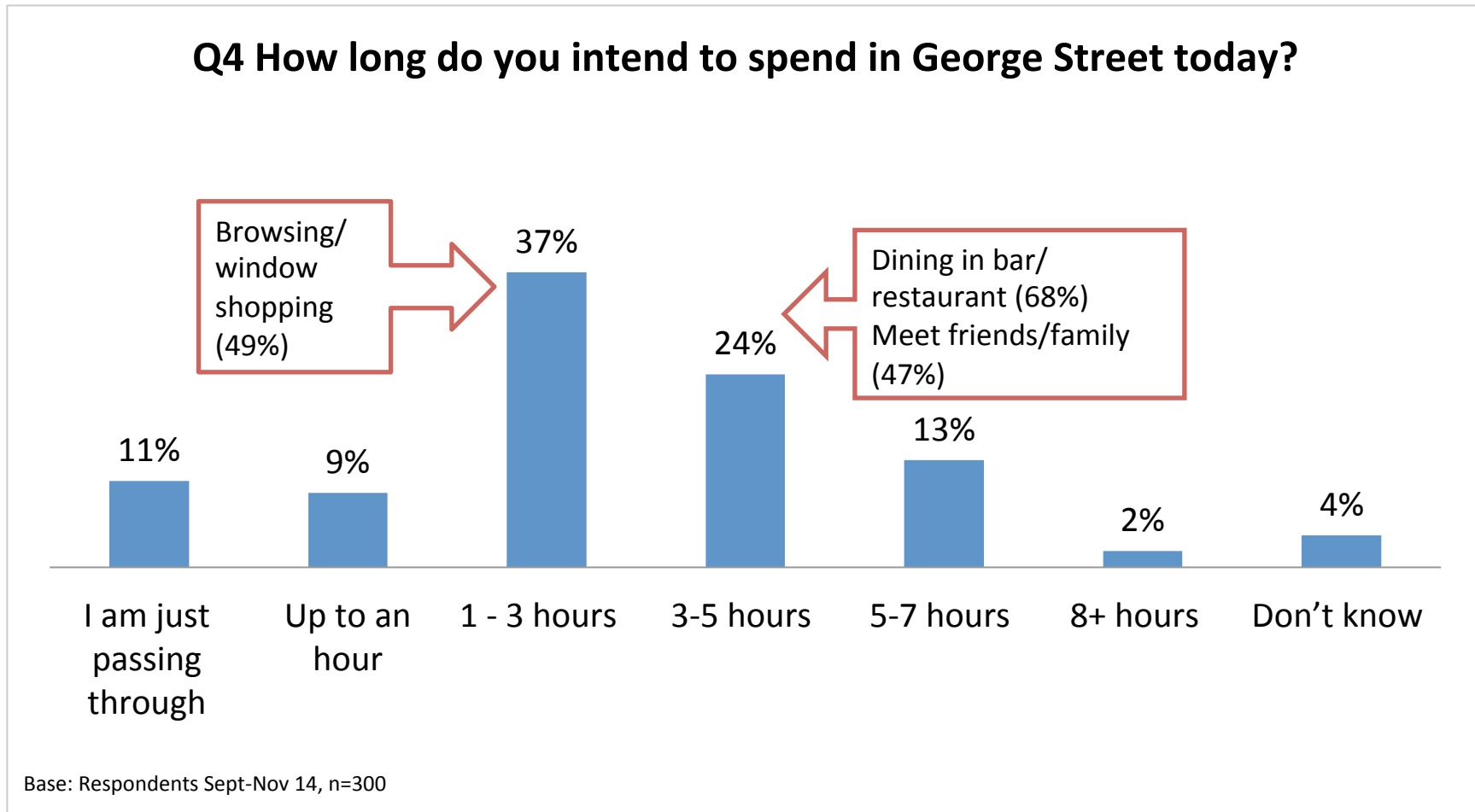
Browsing and dining are the main reasons for visiting George Street

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

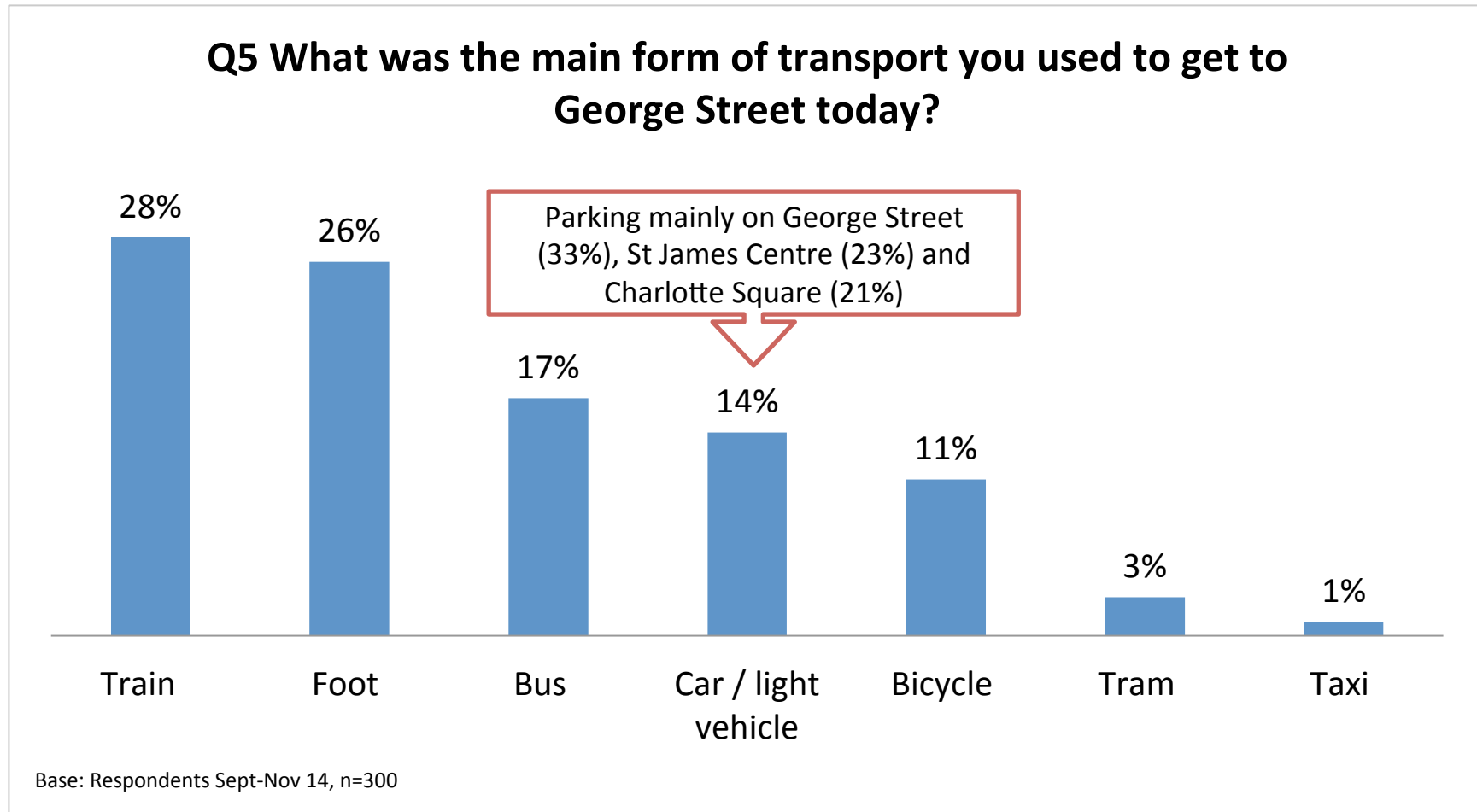


Base: Respondents Sept-Nov 14, n=300

Almost two thirds of visitors stay between 1 and 5 hours

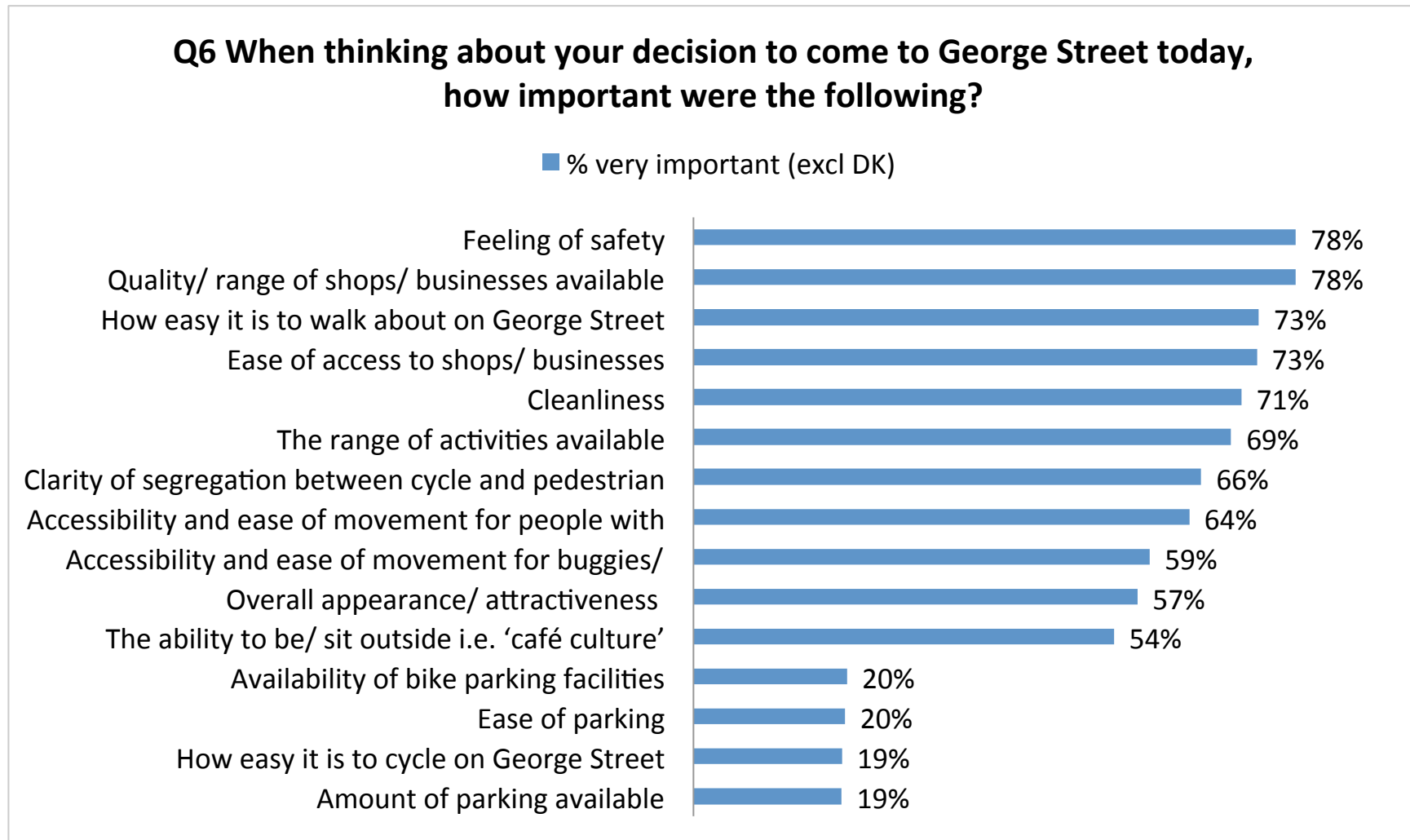


Visitors most likely to travel by train or foot

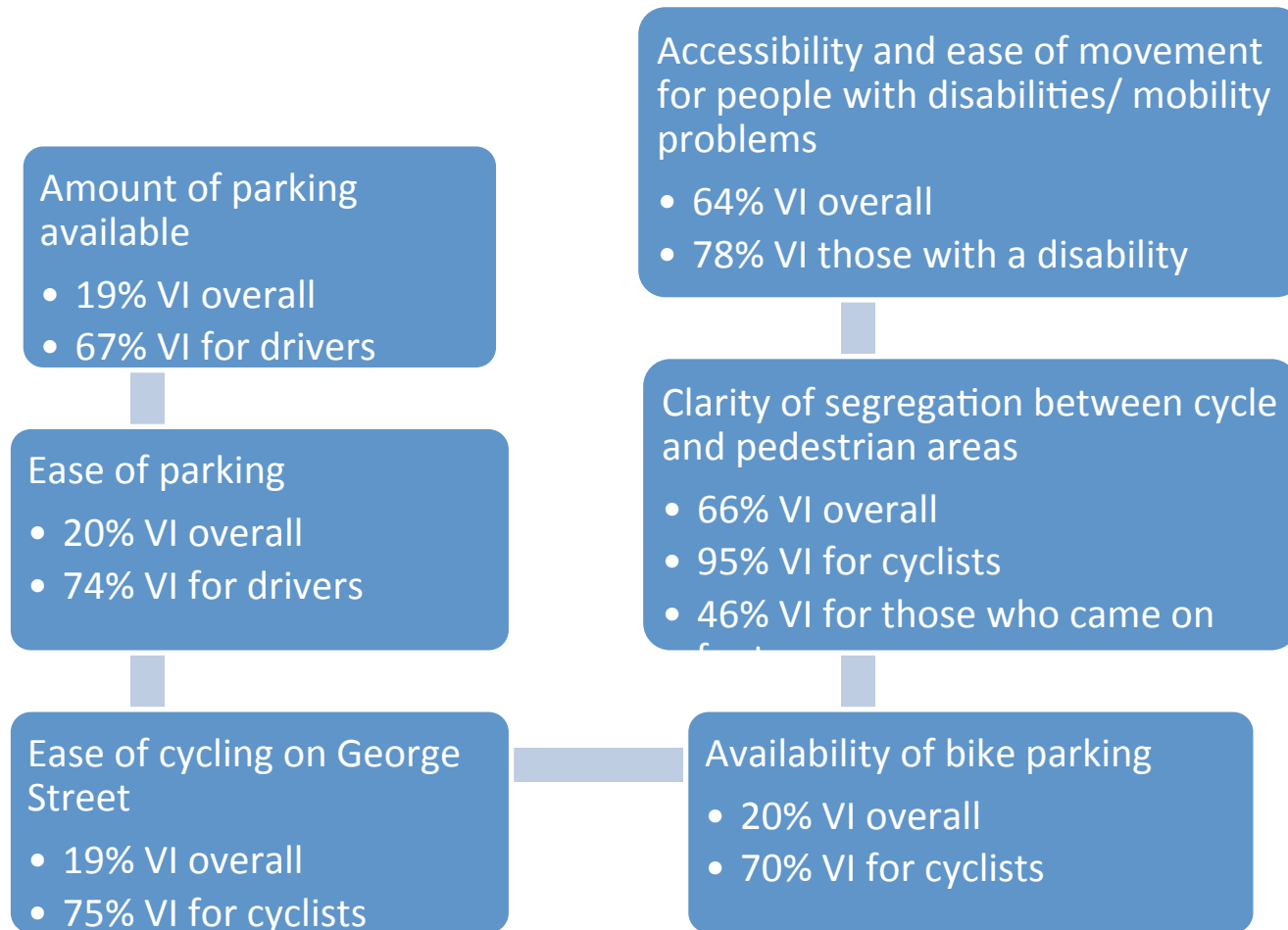


Perceptions and Experience of George Street

Feeling of safety and Quality/ range of businesses most likely to be very important



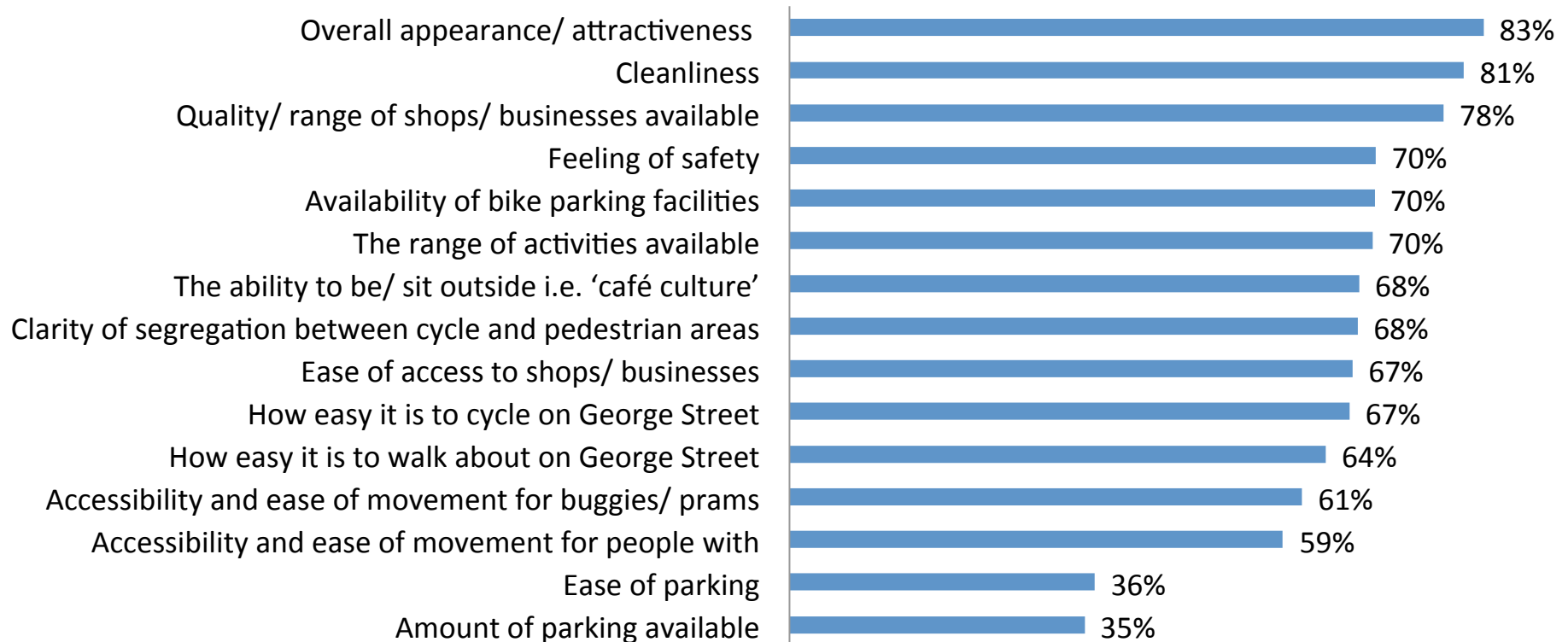
What is important varies for different groups



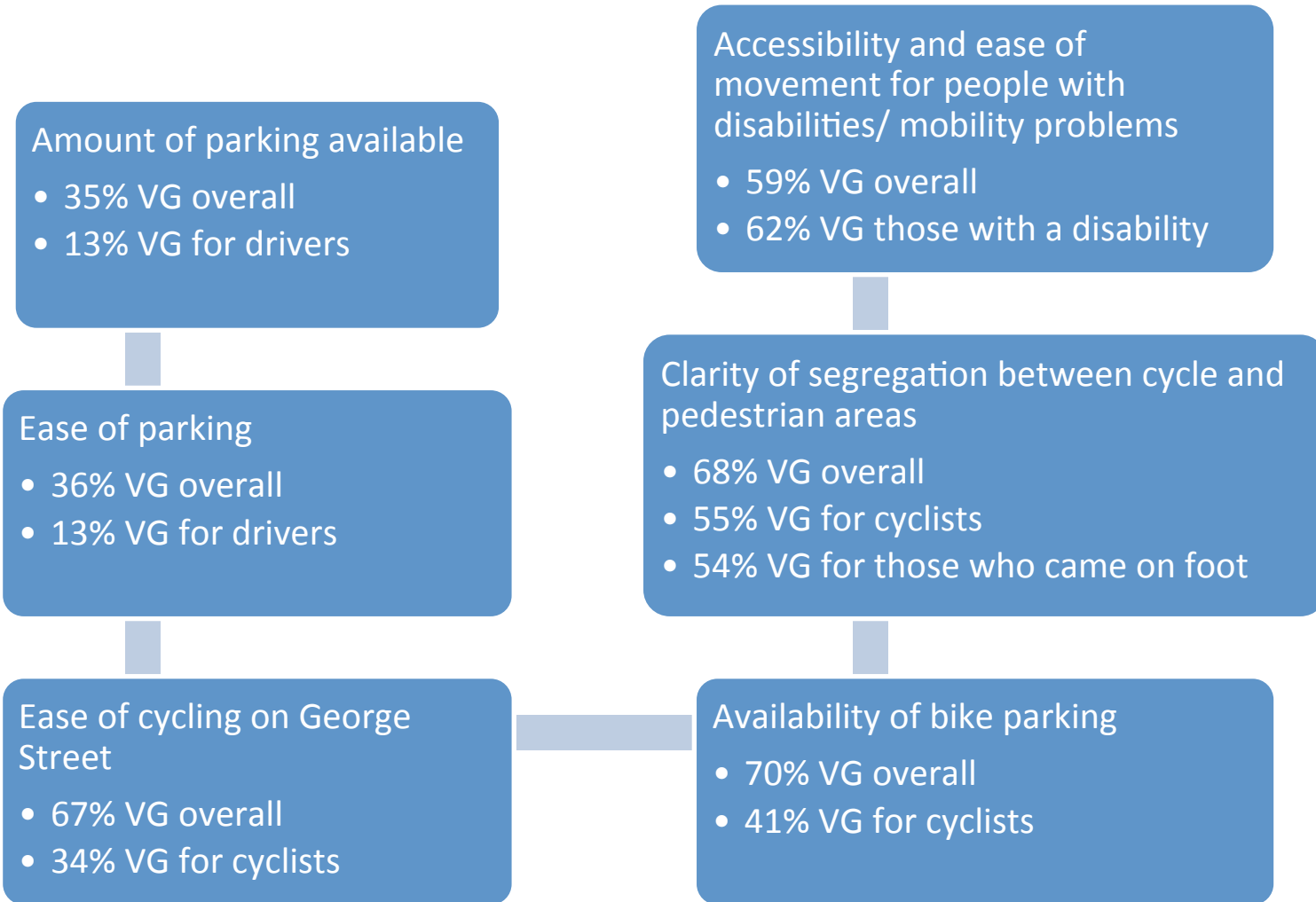
Overall appearance, cleanliness and quality of businesses most highly rated

Q7 Can you now tell me how good or poor you think of each of these are in George Street?

■ % very good (excl DK)



How visitors rate aspects also varies



GAP Analysis of George Street

Priority for action



- Ease of walking about
- Feeling of safety
- Ease of access to shops/ businesses
- Accessibility and ease of movement for people with disabilities

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)

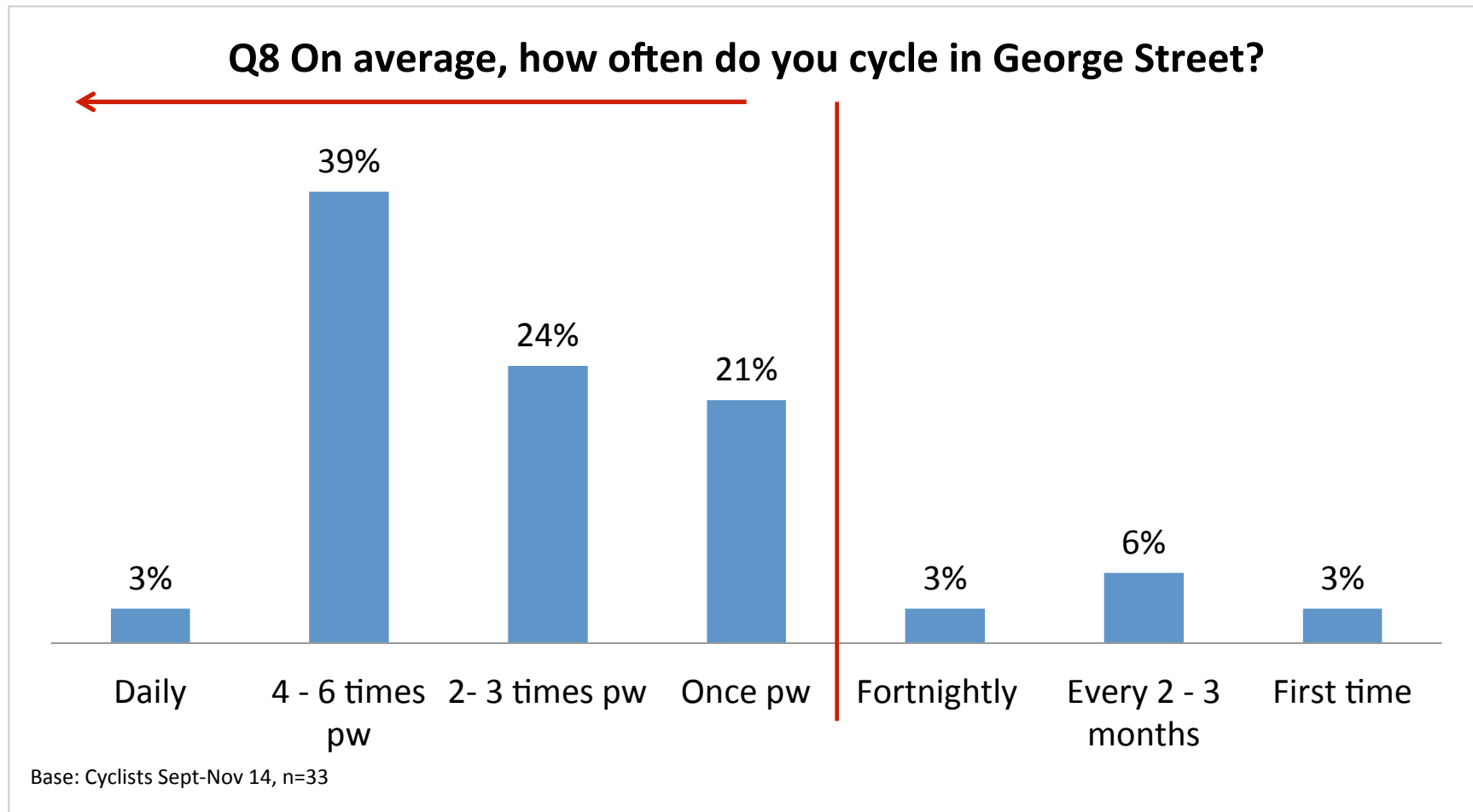
Maintain



- Overall appearance/ attractiveness
- Ability to be/ sit outside
- Cleanliness

Cyclist Experience

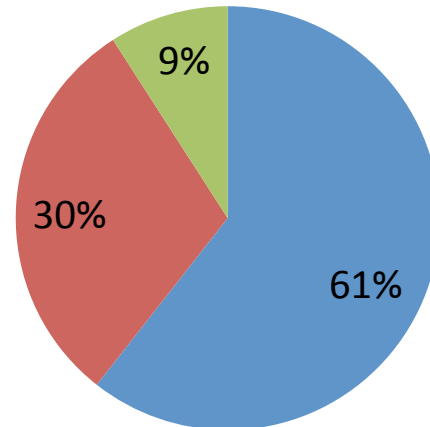
Cyclists tend to cycle in George Street regularly – 87% at least once per week



The majority travel along the length of George Street

Q10 Which of the following best describes how you most commonly use George Street as a cyclist?

- I travel along the length of George Street
- I simply cross over George Street as part of a longer journey
- Varies depending upon journey

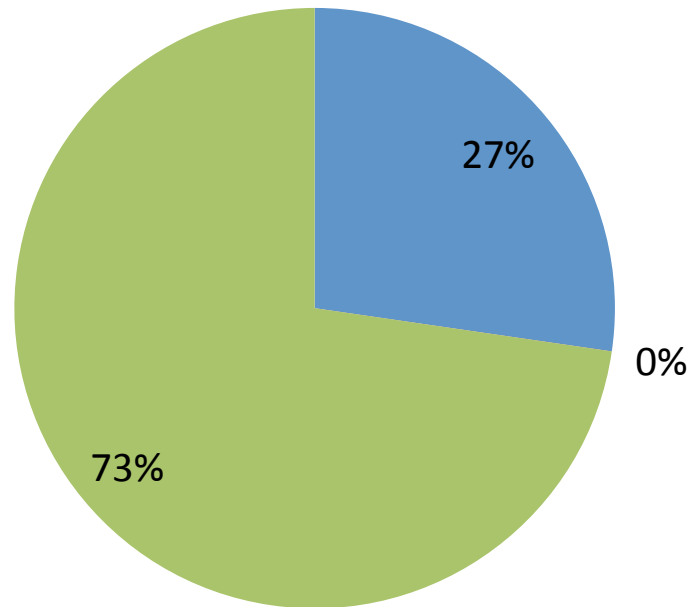


Base: Cyclists Sept-Nov 14, n=33

Just over one quarter now cycle more

Q9 Has this changed since the introduction of cycle lanes?

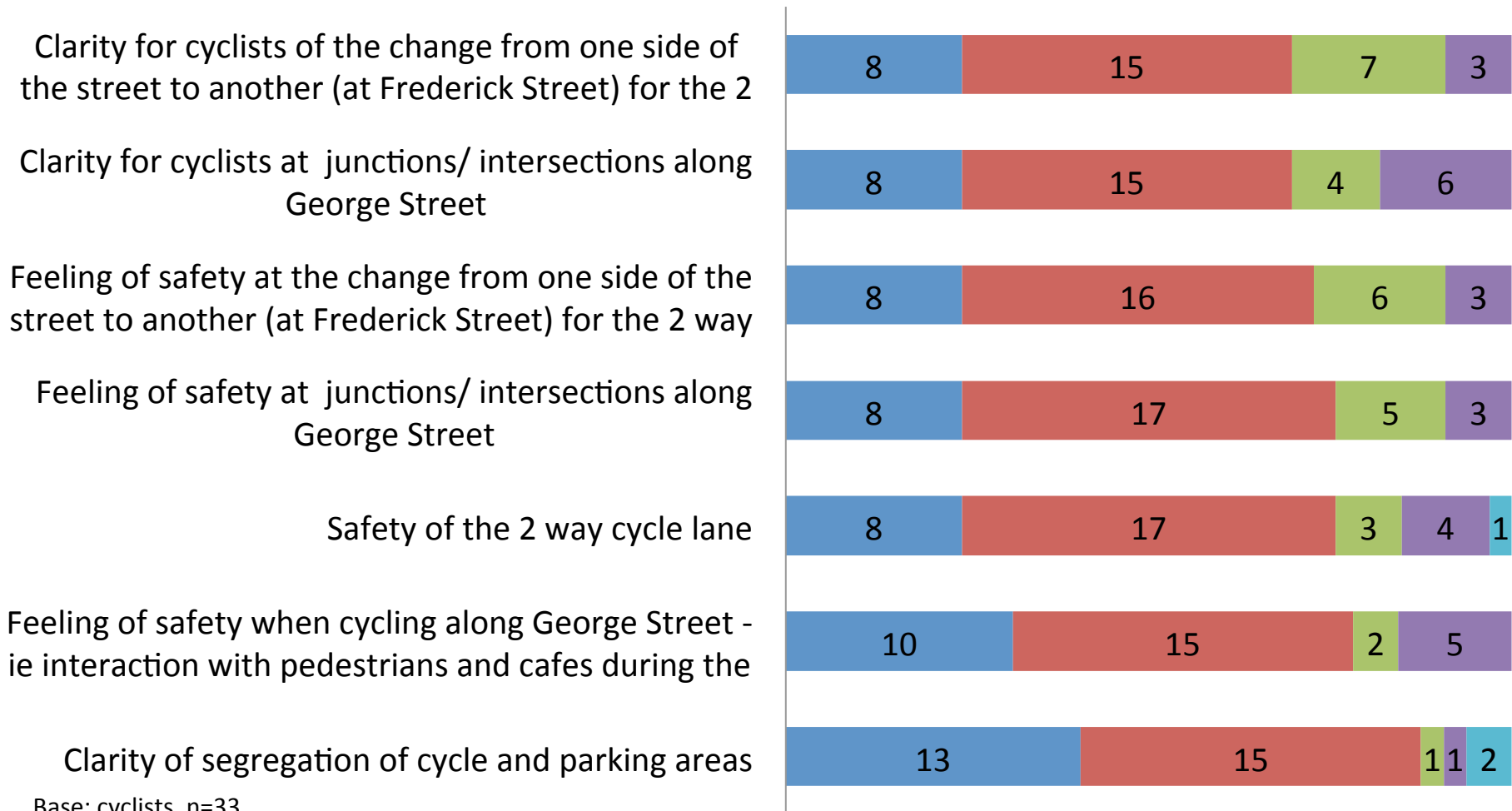
■ Yes, I now cycle more ■ Yes, I now cycle less ■ It has not changed



Base: Cyclists Sept-Nov 14, n=33

Q11 How good or poor are the following for cyclists in George Street?

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



Base: cyclists, n=33

Cyclist comments

Lanes are not big enough, pedestrians keep walking on them. Having to change sides is silly, hasn't been thought through enough.

Pedestrians stray to cycle lanes, oblivious of our presence. Have had several near misses

Regular cyclists can follow the signs with ease but I don't know about novice cyclists - I think it may be difficult for them changing from one side of the street to the other.

Roads are improving everywhere for cyclists and Edinburgh as a whole have great improvements.

Not sure how to access from Charlotte Square, this can be confusing

Cycle lanes are welcome and I think they've done a good job to accommodate everybody.

Suggestions for improvement

Make it on both sides and pedestrianise whole area.

Stop pedestrians moving into cycle lanes by keeping separate e.g. barriers.

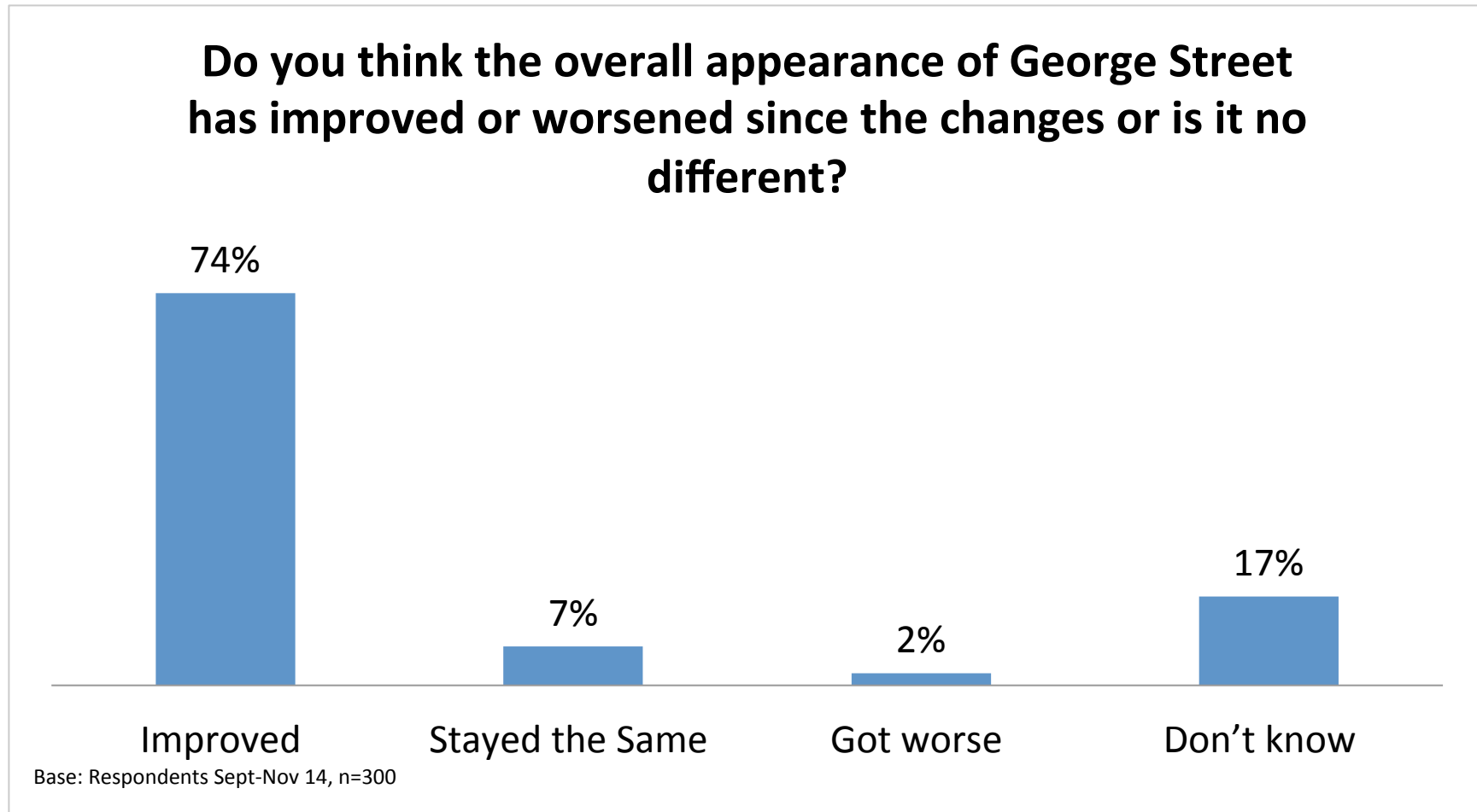
Signs stating rules for cycle lanes. Cycle lane all on one side. Keep lanes clean.

More signage and cycle lane all on one side

No, I think they've done the best they can.

Perceptions of Change in George Street

The majority think George Street's appearance has improved



Respondents gave a range of reasons for perception of improvement

Q14 If improved, why do you say this is the case?	No of comments
Area looking nicer/ more attractive	91
Relaxed atmosphere	39
More space to walk/ cycle	38
More people/ more of a buzz	33
Not as much traffic/ less congestion	22
Great facilities available e.g. shopping/ restaurants/ bars	20
Cosmopolitan atmosphere/ cultured	16
Like being able to sit outside	16
Can cycle safely/ easier to cycle/ good cycle lanes	13
Like the information boards	12
Less fumes/ pollution/ cleaner	8
Looks cleaner/ tidier	7
More families/ more child friendly	4
Traffic noise reduced	3
Due to the one way traffic system	2

Just 7 respondents felt the overall appearance had worsened

Total nightmare for drivers, as well as trams takes longer to get anywhere. Although, area does look nicer.

Not as much parking, nightmare to drive to.

Parking/ driving is difficult and longer to get there. Not enough parking facilities.

I like to park in George Street because I'm staying close by and if you park after a certain time at night, you can stay there to a Sunday. It influences my decision of where to stay and where to come when I'm in Edinburgh.

Parking is worse - far too expensive. Really should reduce the costs or have day passes for visitors.

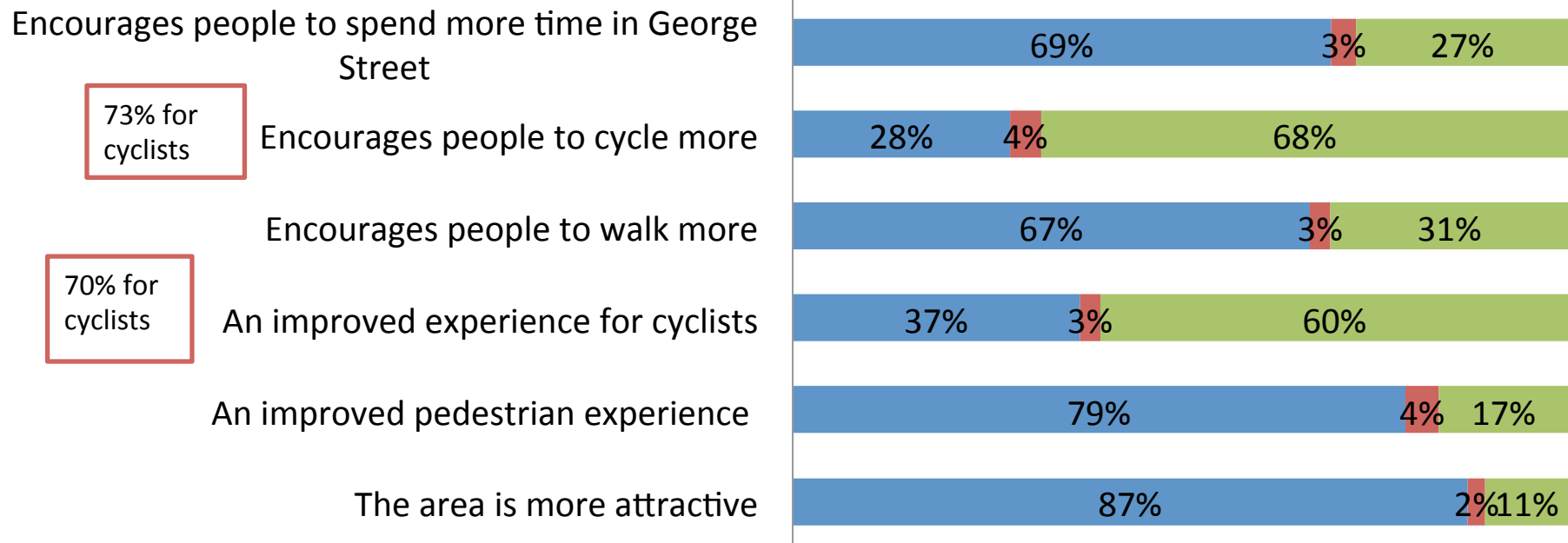
Not enough parking - makes journey longer and more stressful.

Traffic disruptions.

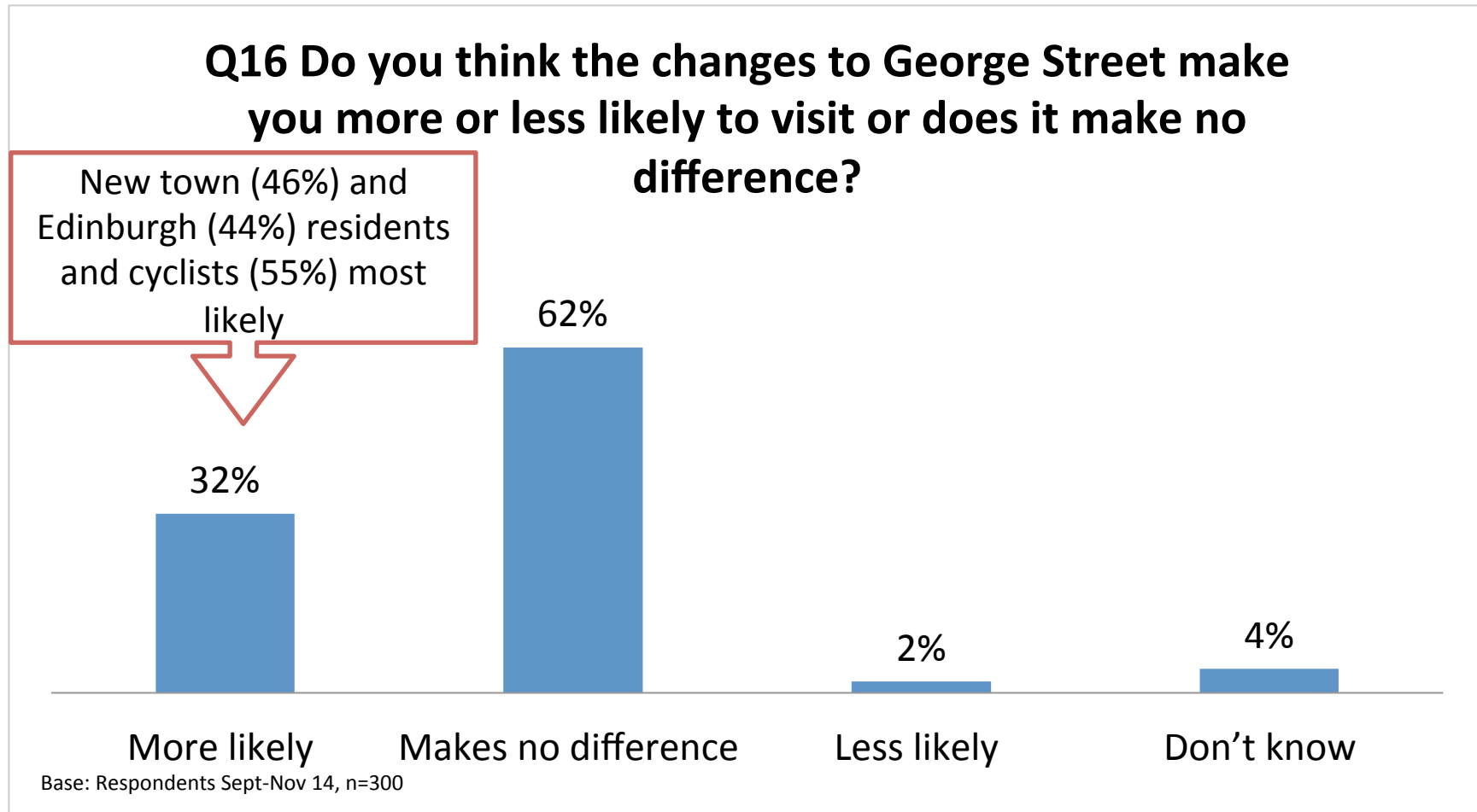
The vast majority of respondents feel that the changes have met their objectives

Q15 Do you think the changes to George Street have achieved any of the following?

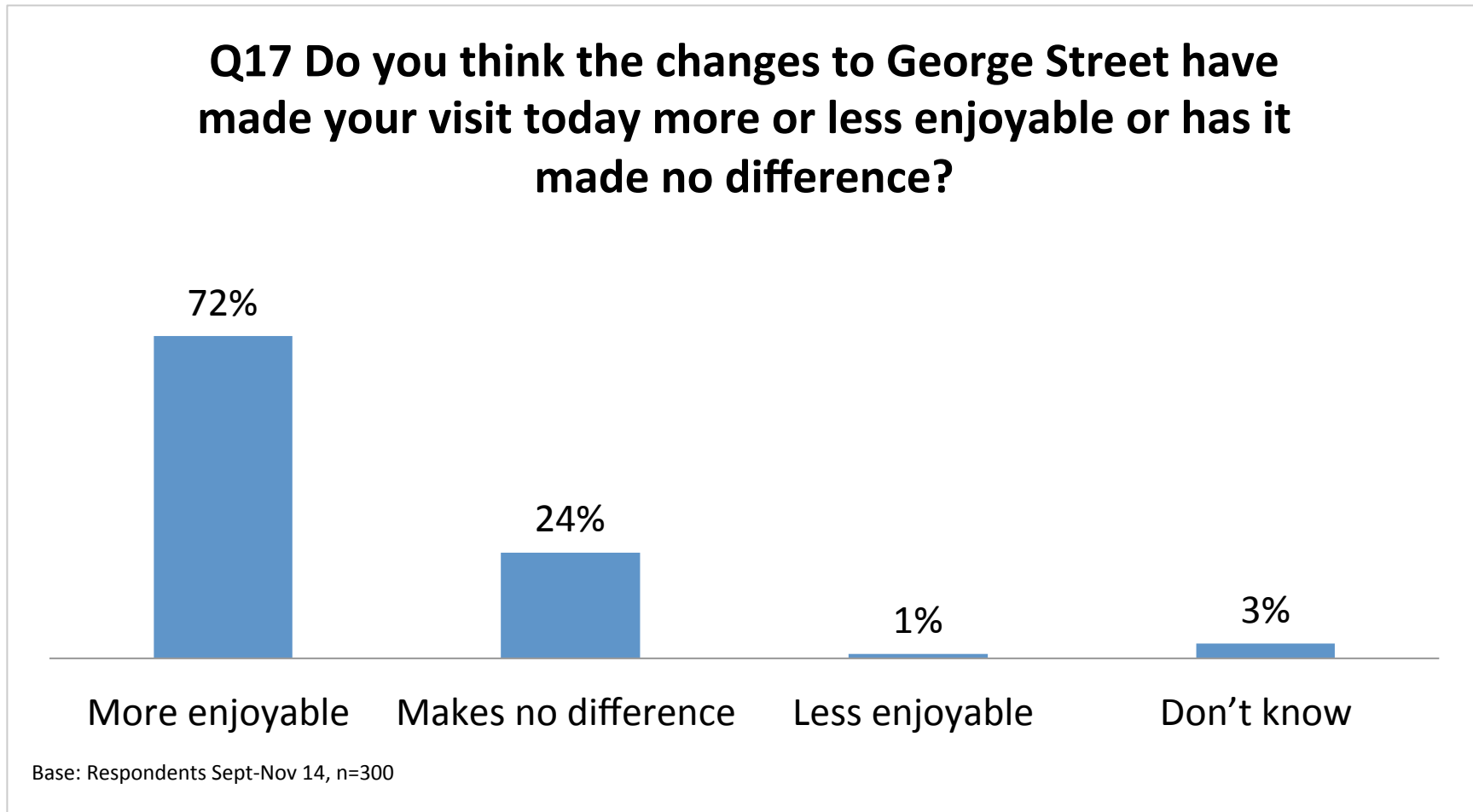
■ Yes ■ No ■ Don't know



94% of visitors say they are at least as likely to visit George Street (32% more likely)

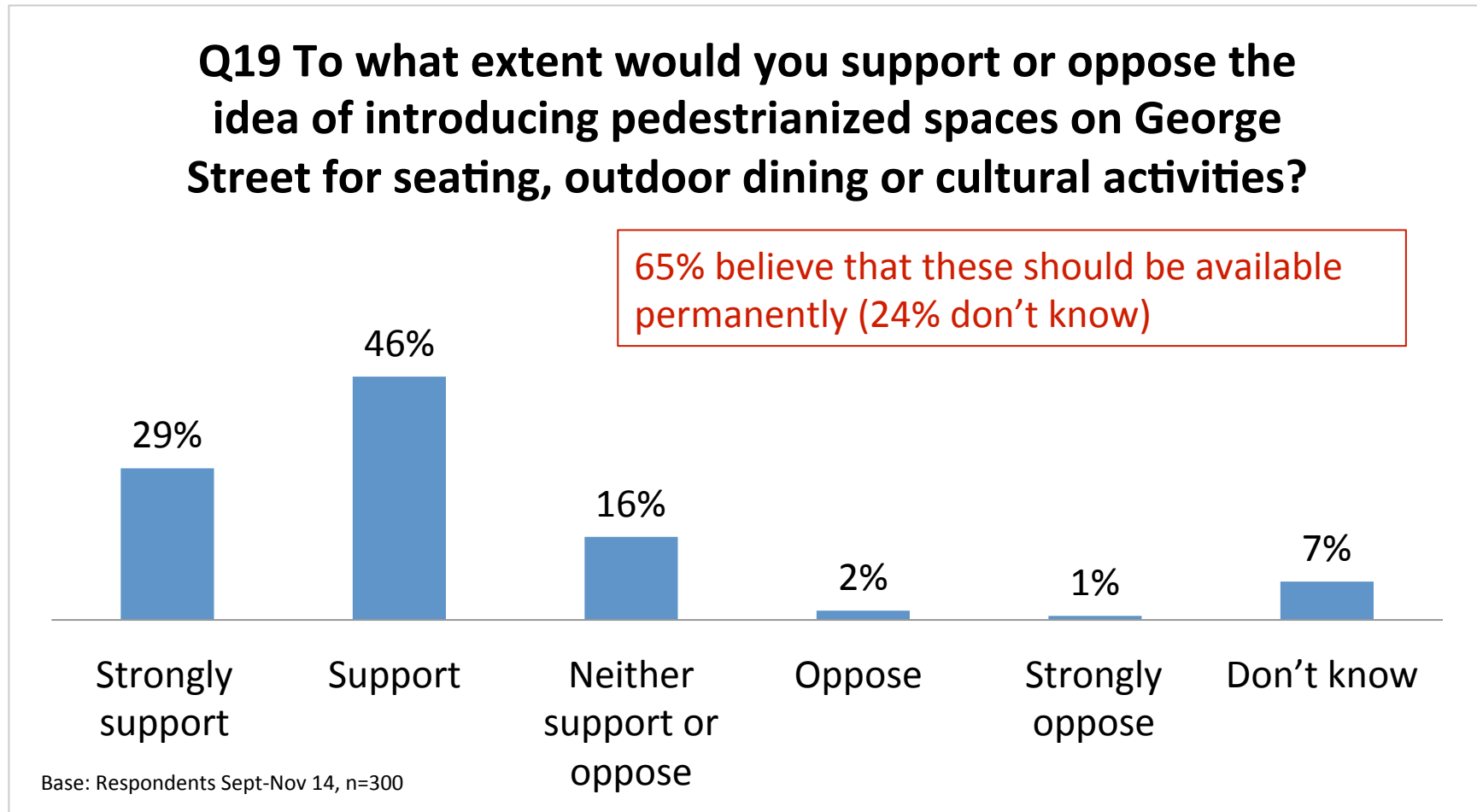


Almost three quarters of respondents felt their trip was more enjoyable as a result

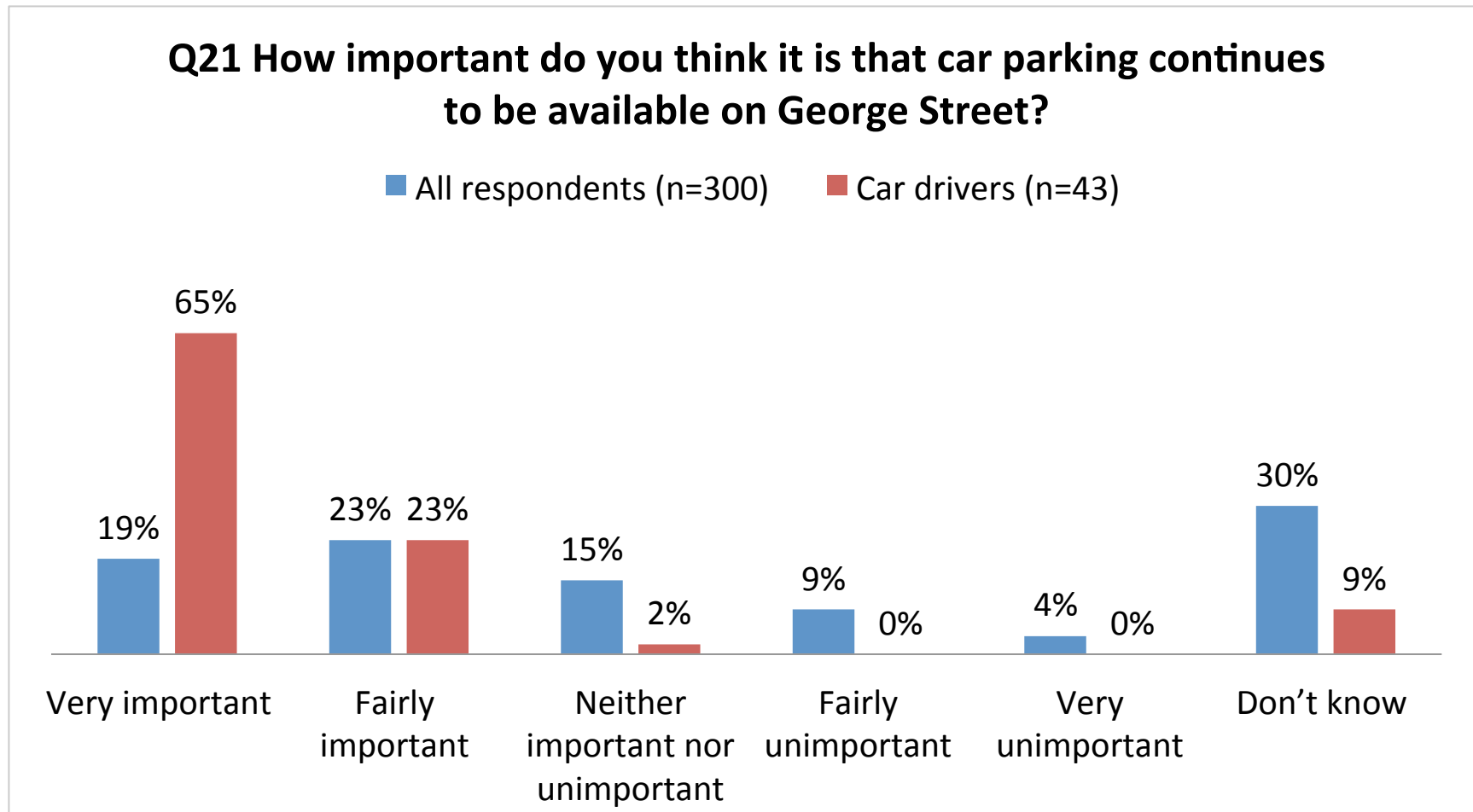


The future of George Street

Three quarters of respondents support the idea of pedestrianized spaces



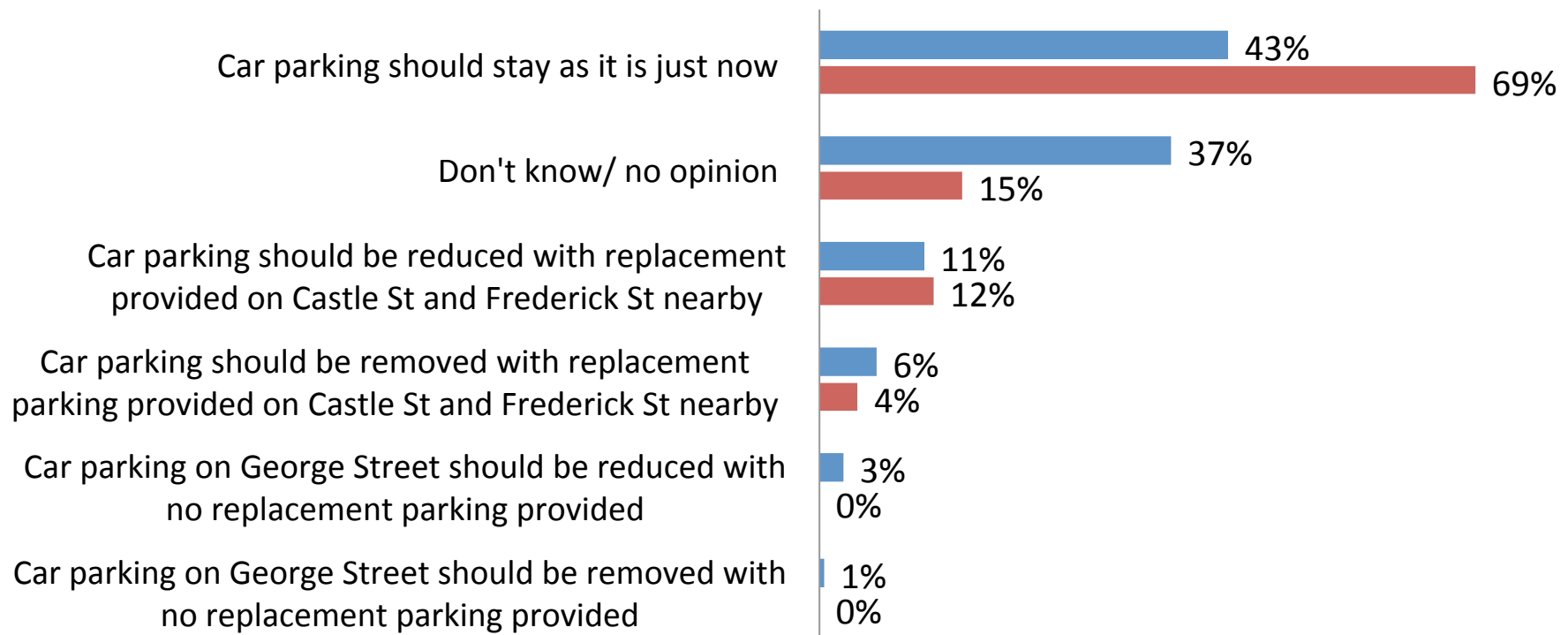
Car drivers much more likely to feel it is important that car parking continues to be available on George Street



Car drivers preference is that parking remains as it is

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

■ All respondents (n=300) ■ Car drivers (n=26)



Suggestions for improvement

- 67% had no suggestions for improvement
- Of those that did, the most common comments were:

Make changes permanent/ maintain the changes (30%)

More street entertainment e.g. street artists/ stalls (15%)

Ban cars altogether/ pedestrian area only (13%)

More/ affordable parking (12%)

Keep clean/ clear up litter (10%)

Improve landscaping e.g. trees/ flowers (4%)

More seating areas (3%)

More cafes selling coffee/ cakes (5%)

Cycle lane changes e.g. both sides or down centre (6%)

Base: number of respondents who made comment, n=101

Any questions?