



George Street ETRO

VISITOR RESEARCH – QUARTER 3 FINDINGS

MARCH 2015 TO MAY 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

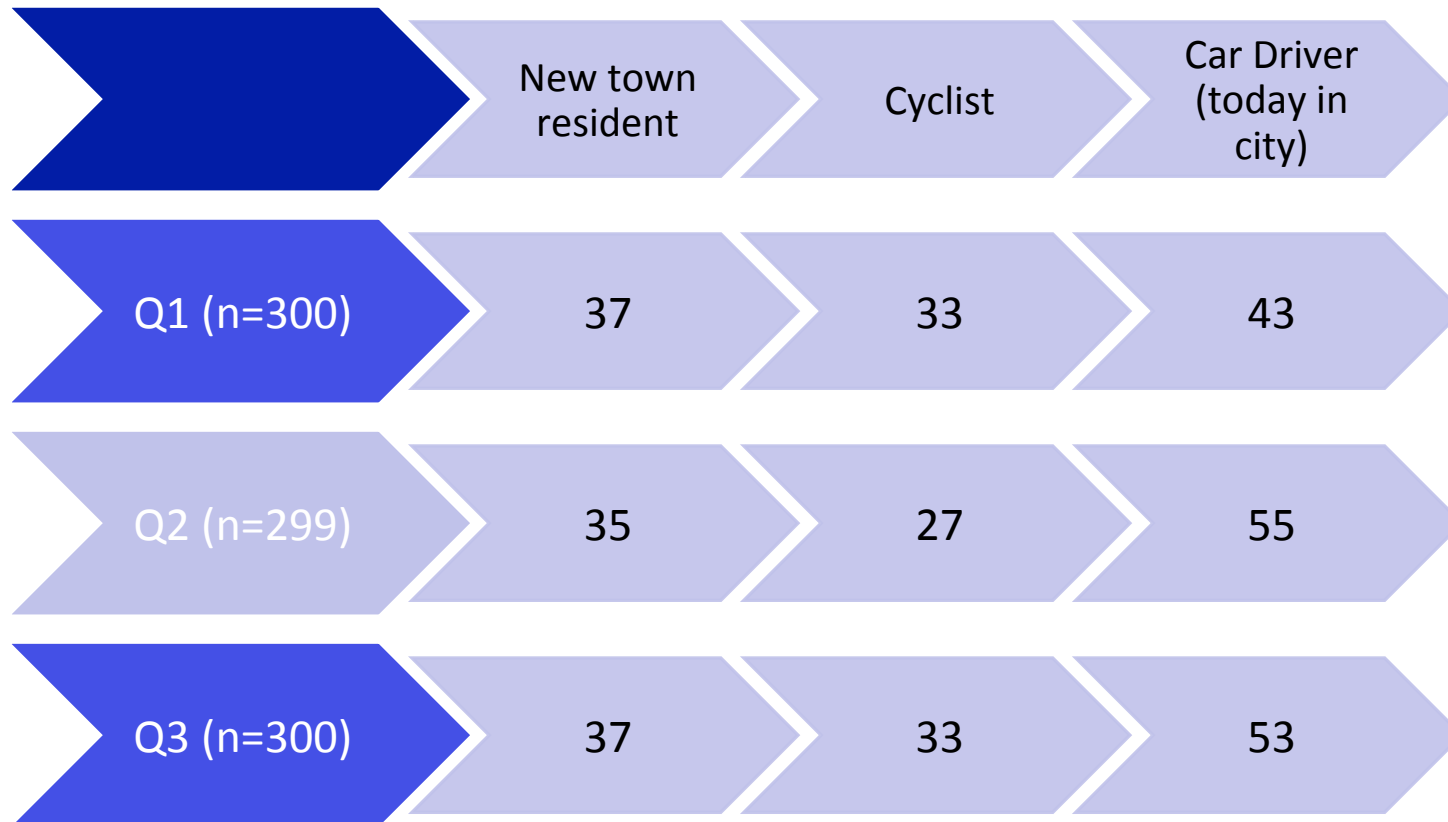
Survey

- 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

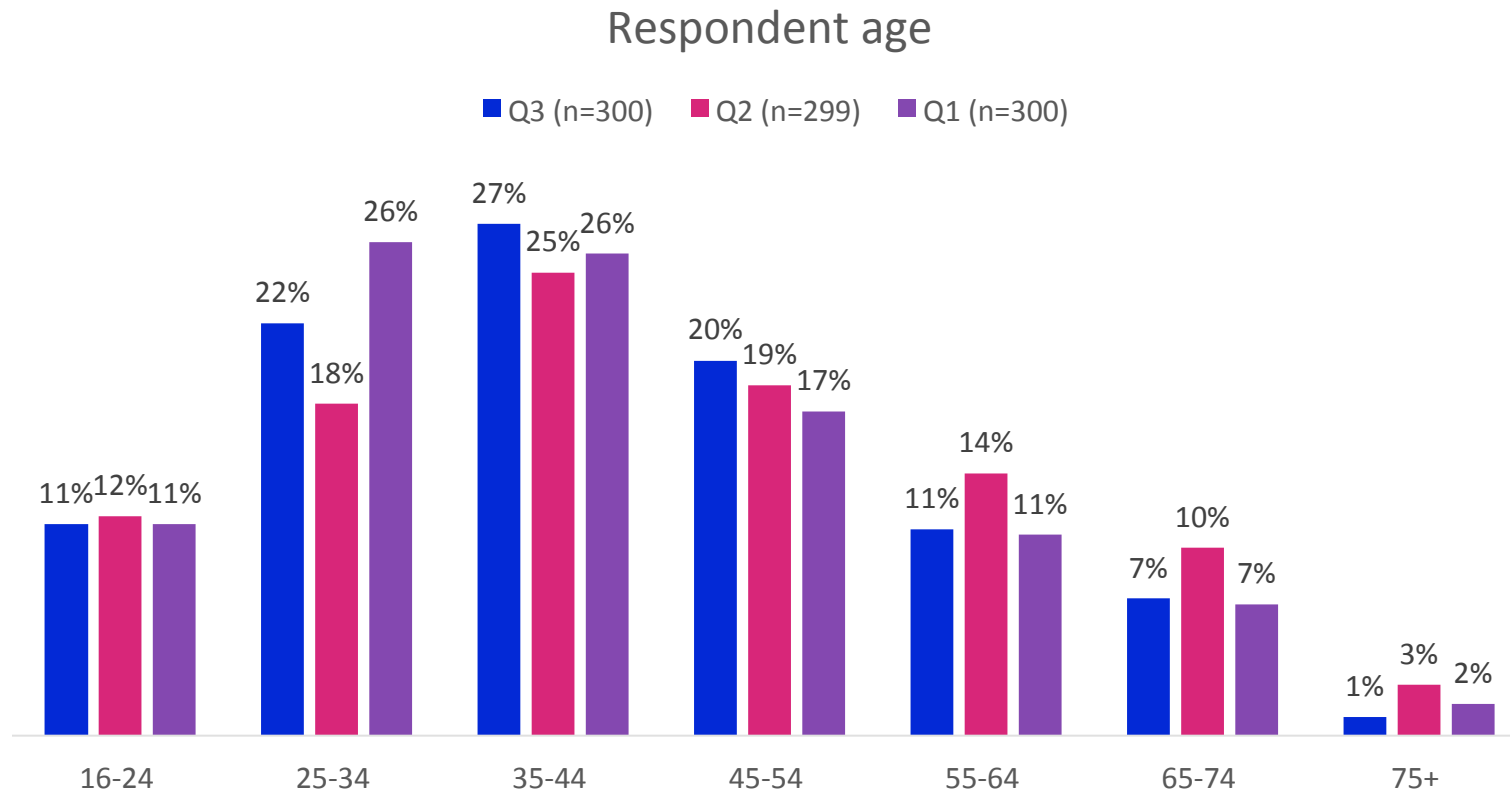
Output

- Q1 - 300 interviews carried out between September and November 2014
- Q2 - 299 interviews carried out between December 2014 and February 2015
- Q3 - 300 interviews carried out between March 2015 and May 2015
- Total of 899 interviews to date

Respondent profile



Respondent age profile

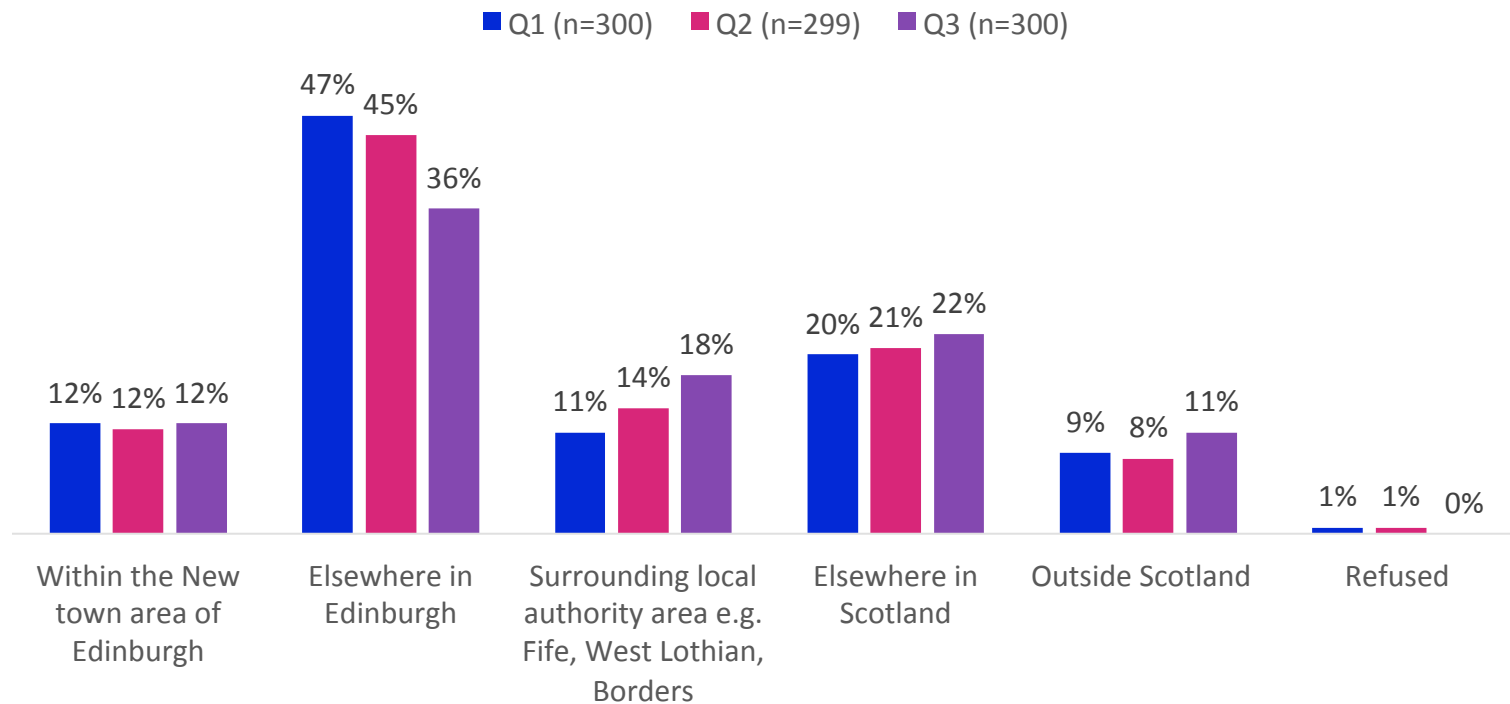


Gender and disability profile

Quarter	Gender	Disability
<ul style="list-style-type: none">• Q1	<ul style="list-style-type: none">• M 43%	<ul style="list-style-type: none">• Y 6%
<ul style="list-style-type: none">• Q2	<ul style="list-style-type: none">• M 43%	<ul style="list-style-type: none">• Y 5%
<ul style="list-style-type: none">• Q3	<ul style="list-style-type: none">• M 44%	<ul style="list-style-type: none">• Y 5%

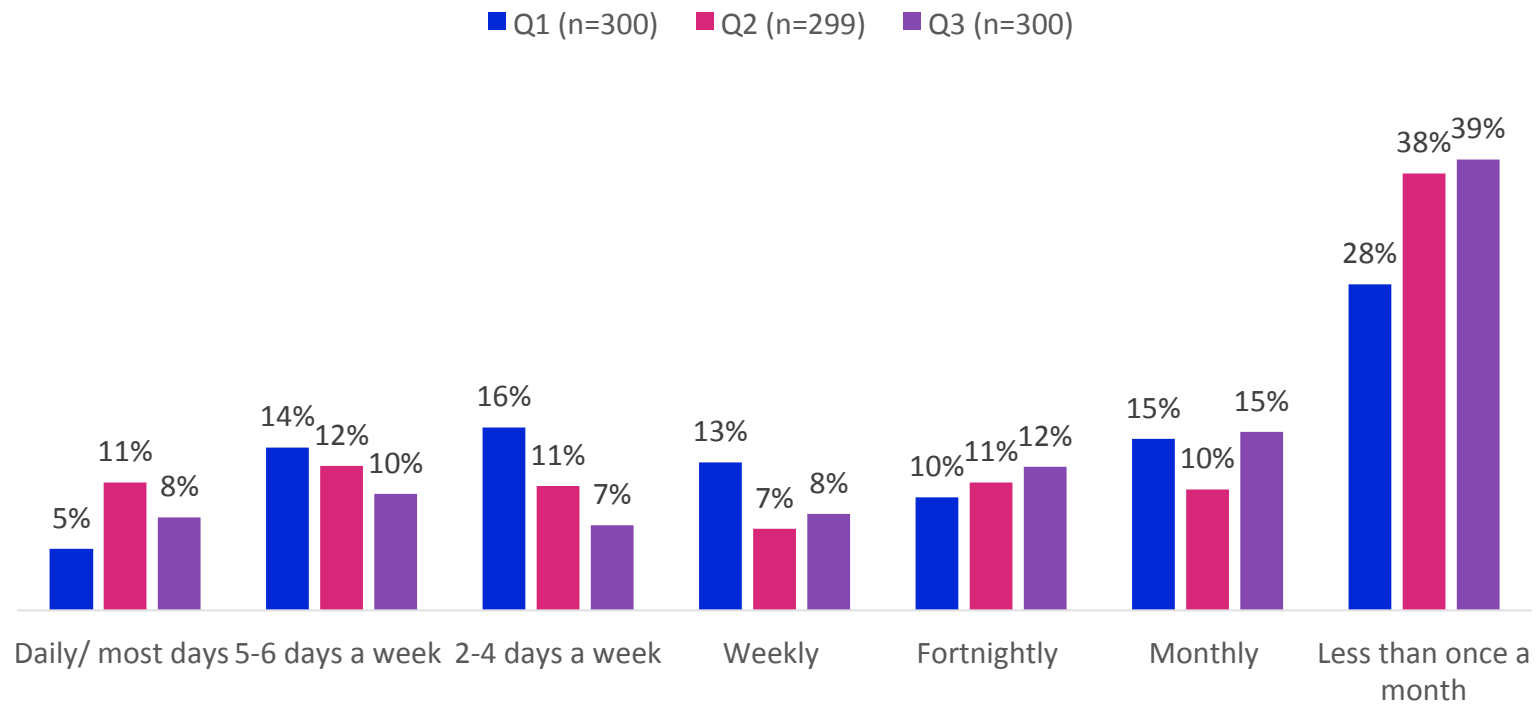
Just over half (51%) from outside Edinburgh

Location of home address



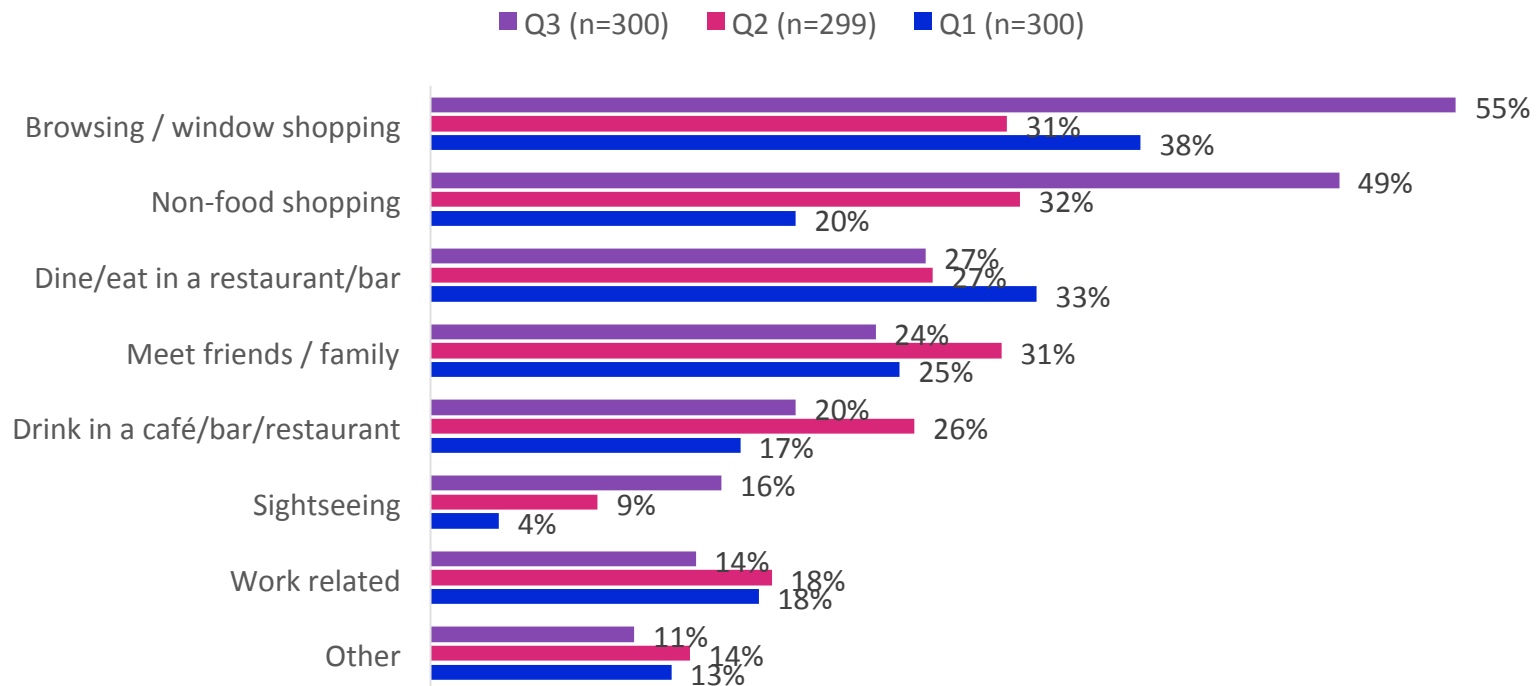
Just over half (54%) visit monthly or less often

Q1 On average, how often do you visit George Street?



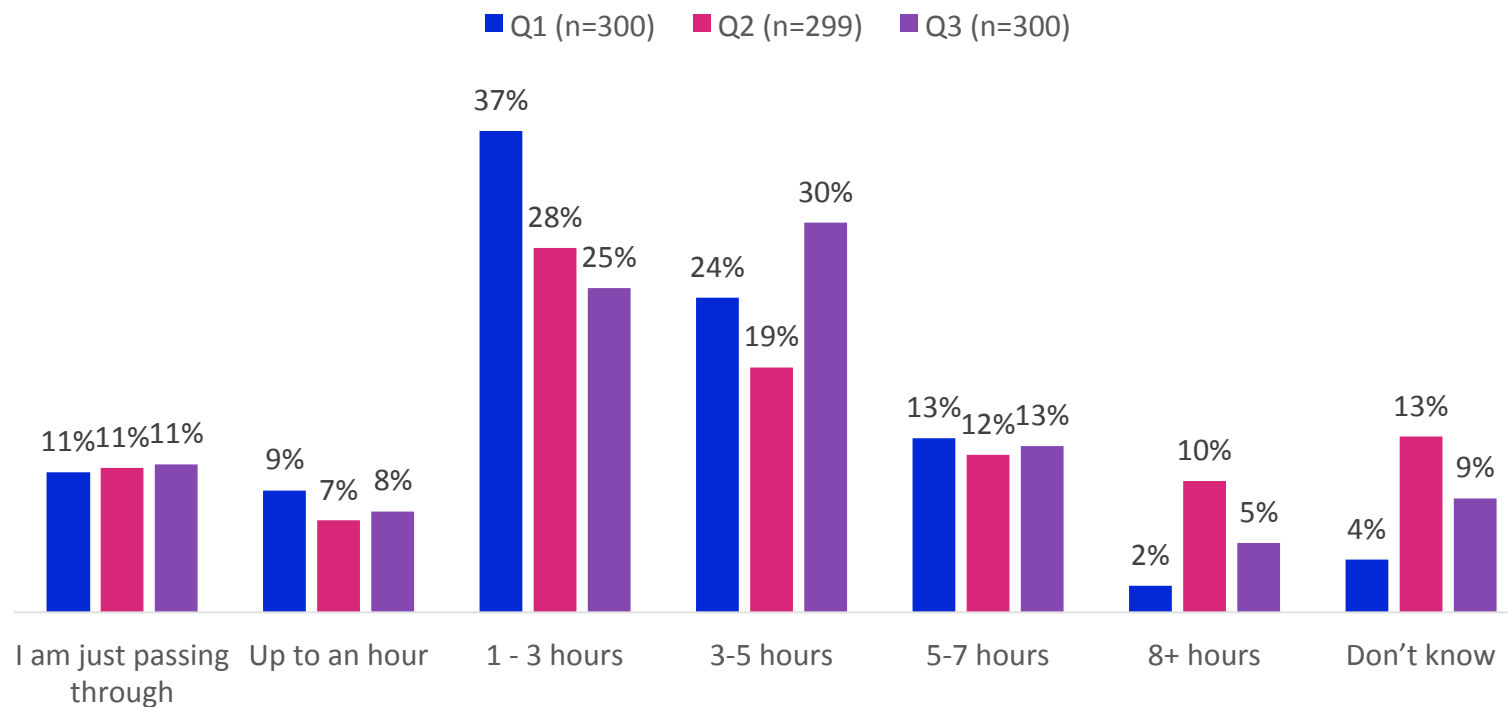
Browsing and shopping are the most common purpose for visit

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



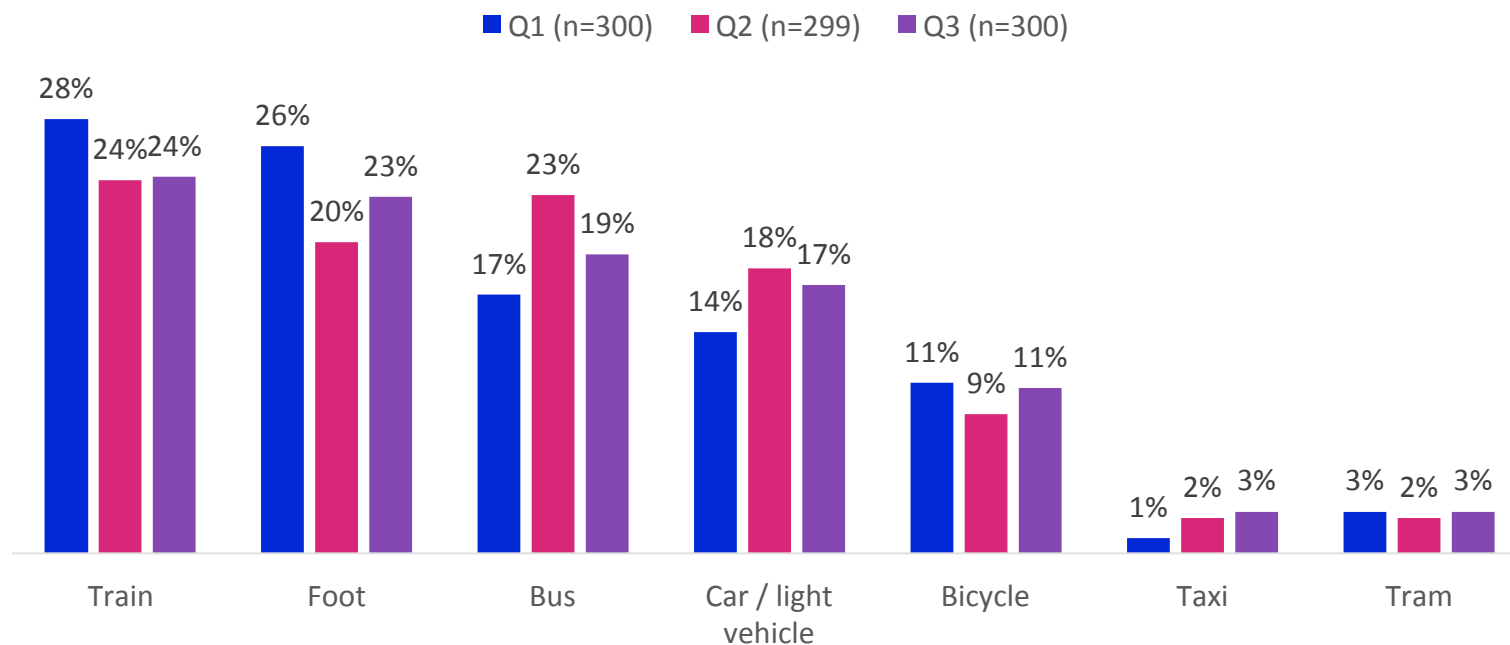
Q3 visitors appear to be staying longer in George Street

Q4 How long do you intend to spend in George Street today?

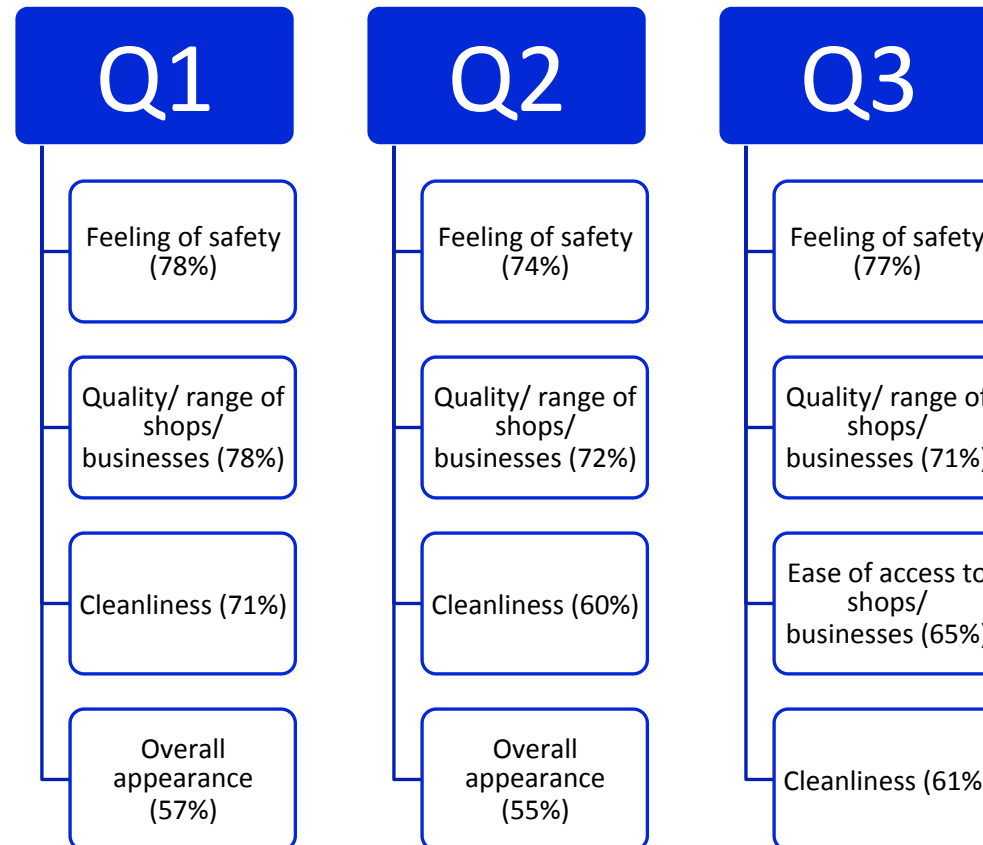


Train was the most common method of transport, followed by foot and bus

Q5 What was the main form of transport you used to get to George Street today?



Visitor priorities are consistent across all quarters



Ratings are consistently high for the majority of aspects of George Street



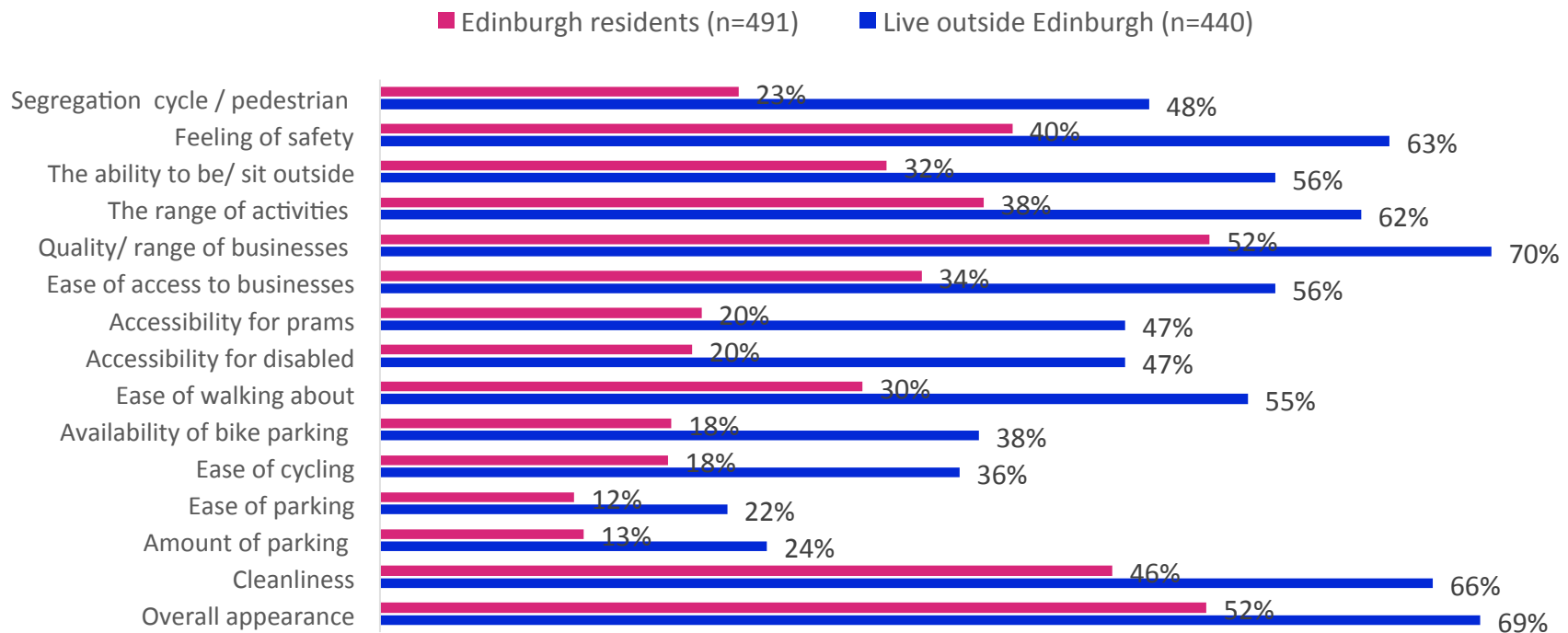
Feeling of safety (99%)
Quality/ range of shops/
businesses (99%)
Ease of walking about (97%)
Overall appearance (97%)
Range of activities (95%)
Ease of access (95%)
Cleanliness (91%)

Ease of parking (37%, 43% for
drivers)
Availability of bike parking (38%,
58% for cyclists)
Amount of parking (41%, 40%
for drivers)
Ease of cycling (42%, 76% for
cyclists)
Accessibility/ ease of movement
for prams (56%)



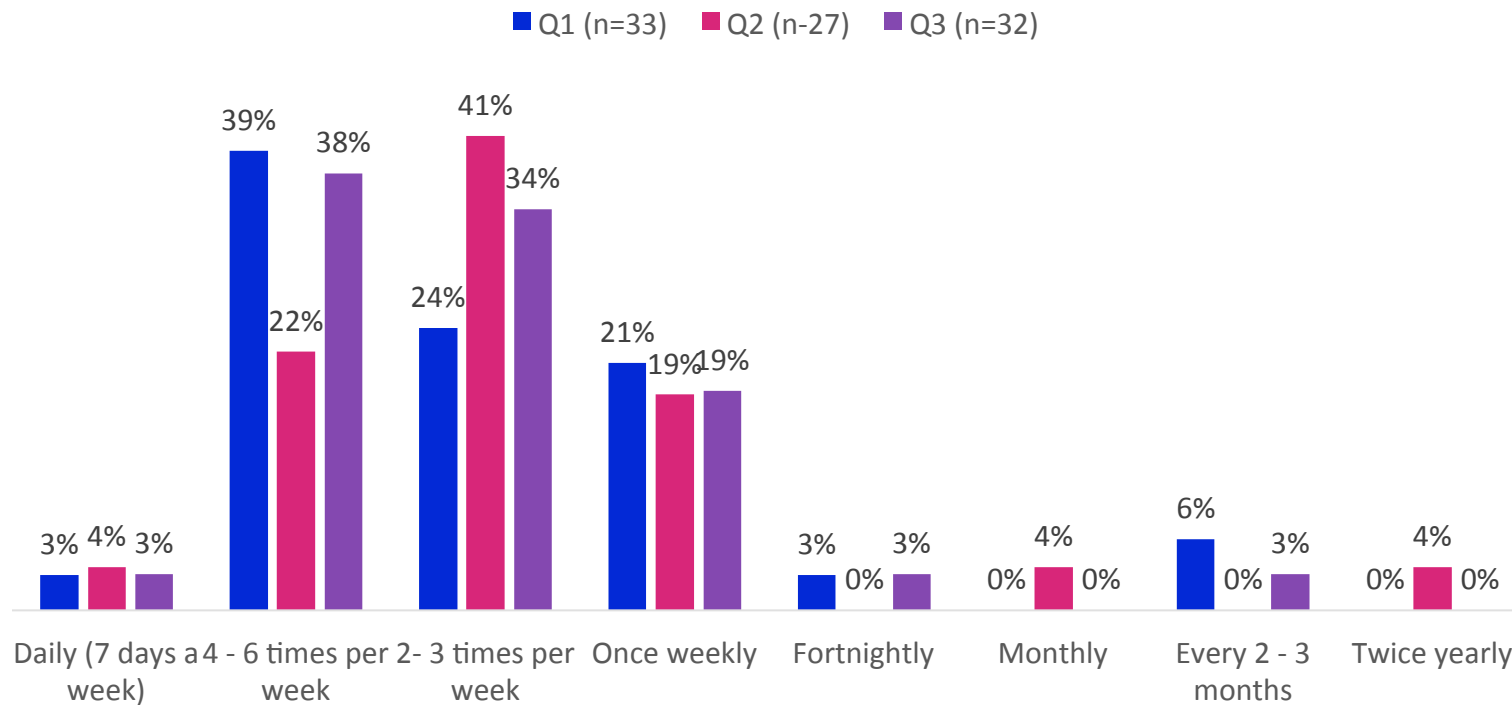
Edinburgh residents still less positive than those outwith Edinburgh

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



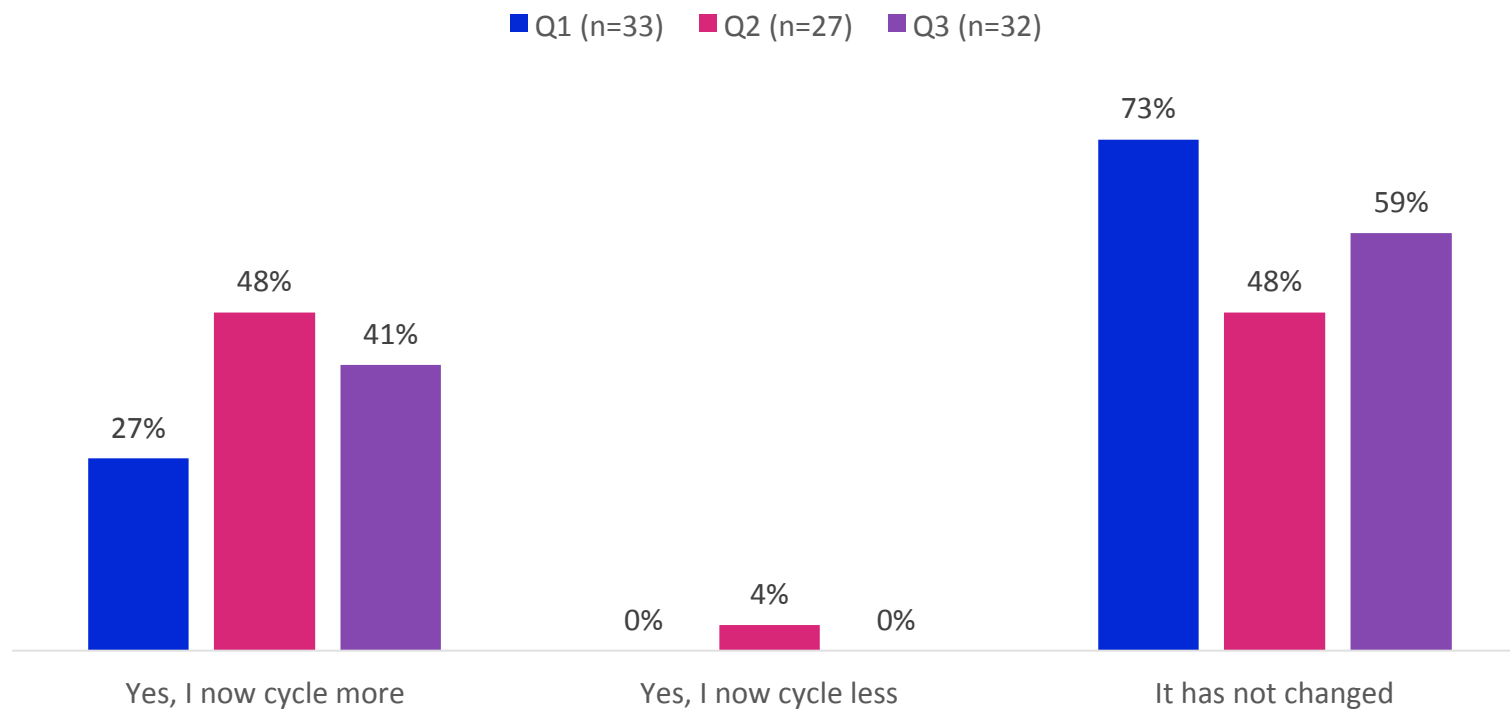
Frequency of cycling in George Street has increased Q3 (94% at least once per week)

Q8 On average, how often do you cycle in George Street?



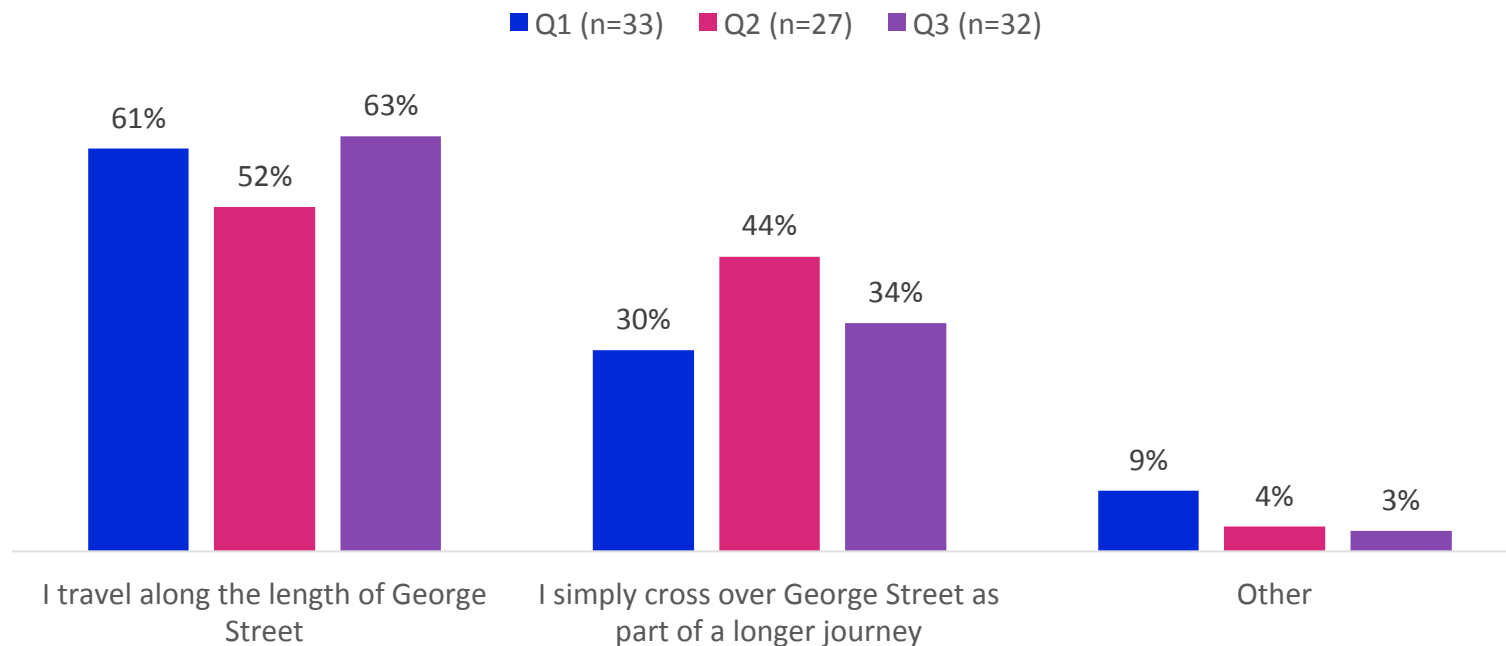
Over 4 in 10 cyclists now say they cycle more

Q9 Has this changed since the introduction of cycle lanes?



There has been a slight increase in cyclists travelling the length of George Street

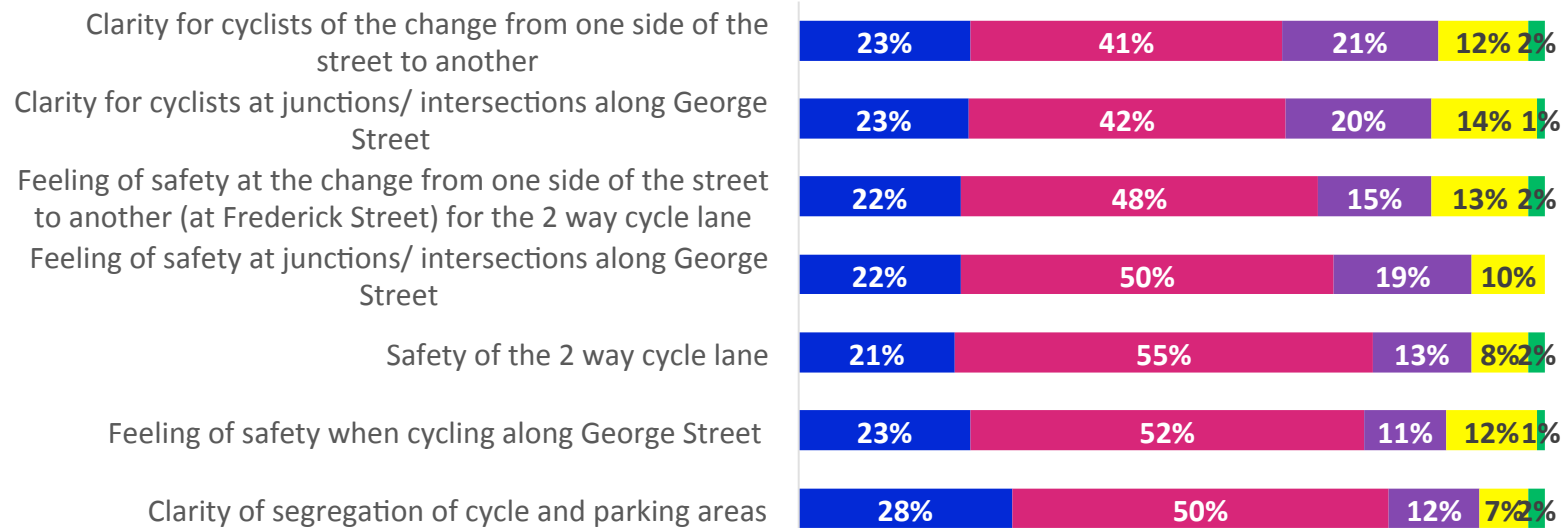
Q10 Which of the following best describes how you most commonly use George Street as a cyclist?



Around two thirds of cyclists rate their experience as 'good'

Q11 How good or poor are the following for cyclists in George Street? (Base: Cyclists, n=92)

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



Cyclists suggestions for improvement

More lanes more noticeable, colour coded. Take away parking, make pavements bigger and have outside seating areas on pavements.

Lanes are too close to restaurants (tents).

More parking facilities. Make whole thing pedestrianised. Take away boards, put proper signage in. Paint lanes so they are more noticeable. Everything looks temporary, needs to be done properly.

Get rid of temporary fixtures and make cycle lanes permanent. More bike parking facilities.

Proper signs. More parking facilities for bikes. Bit more space between tents and lanes.

Allow cyclists to flow freely down both lanes, or just one lane for cyclists.

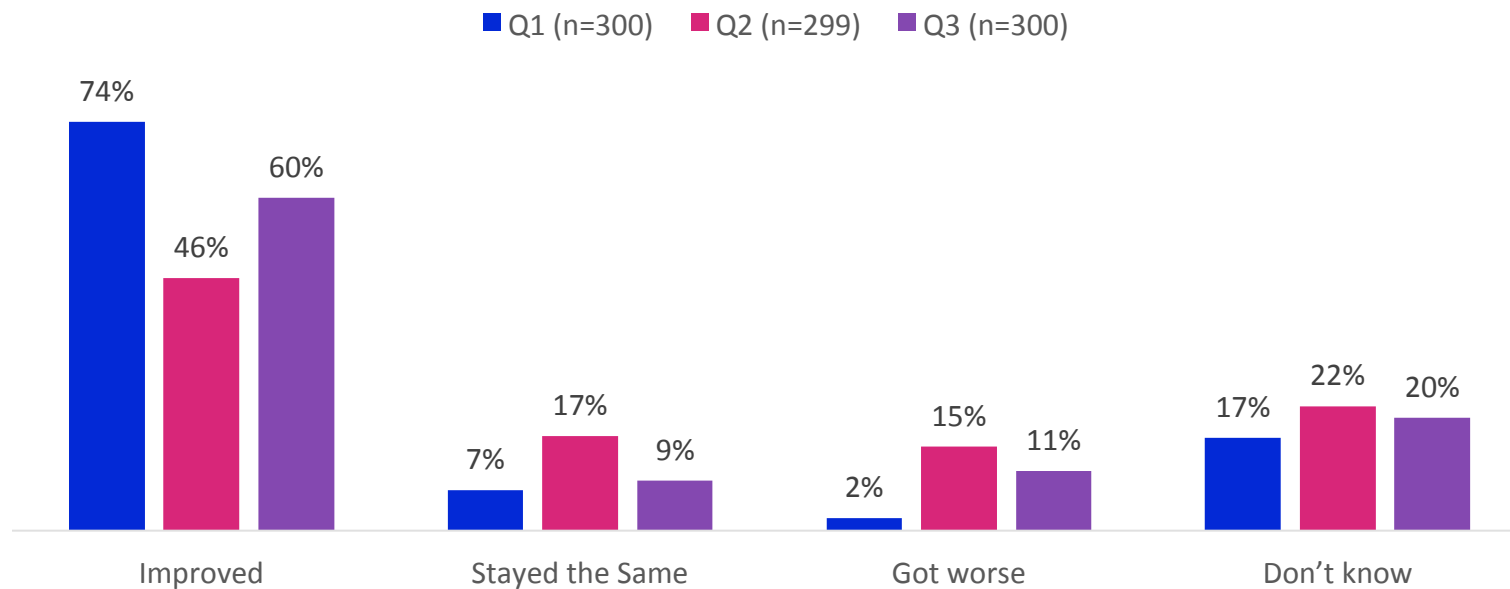
Perception of change in George Street

‘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... ‘



After a dip in Q2, Q3 shows an increase in positivity regarding the overall appearance

Q12 Overall, do you think the overall appearance of George Street has improved or worsened since the changes or is it no different?



Why do you say the ETRO has improved George Street....some examples

I love the look of it. It reminds me of being on holiday.

More spacious, less cluttered looking.

More cosmopolitan that goes with the type of shops available here. More reasons to come.

Just very pleasant to visit. Clean, looks good.

A great place to socialise, although it always was. It now has a more European feel to it, especially in summertime.

Looks better. Calmer and more chilled.

More spacious, better for me because I'm disabled.

Easier to walk about. Peaceful/ calmer. Flowers and information boards good touch. Ability to sit outside and enjoy the sunshine.

Looks double in size, you can appreciate how wide it is.

Why do you say the ETRO has worsened George Street....some examples

Tents are horrific. They are untidy and ruin street.

Ruined street, taken away it's culture and history. No need for it at all. Causing unnecessary traffic congestion.

Too much clutter, particularly when it's busy. Pavements are uneven.

Decking is cheap and tacky tents are an eyesore.

Ruined street. Obscured buildings with unsightly tents and street furniture.

Poor looking, shabby and messy. Ruined street. Not accessible for drivers.

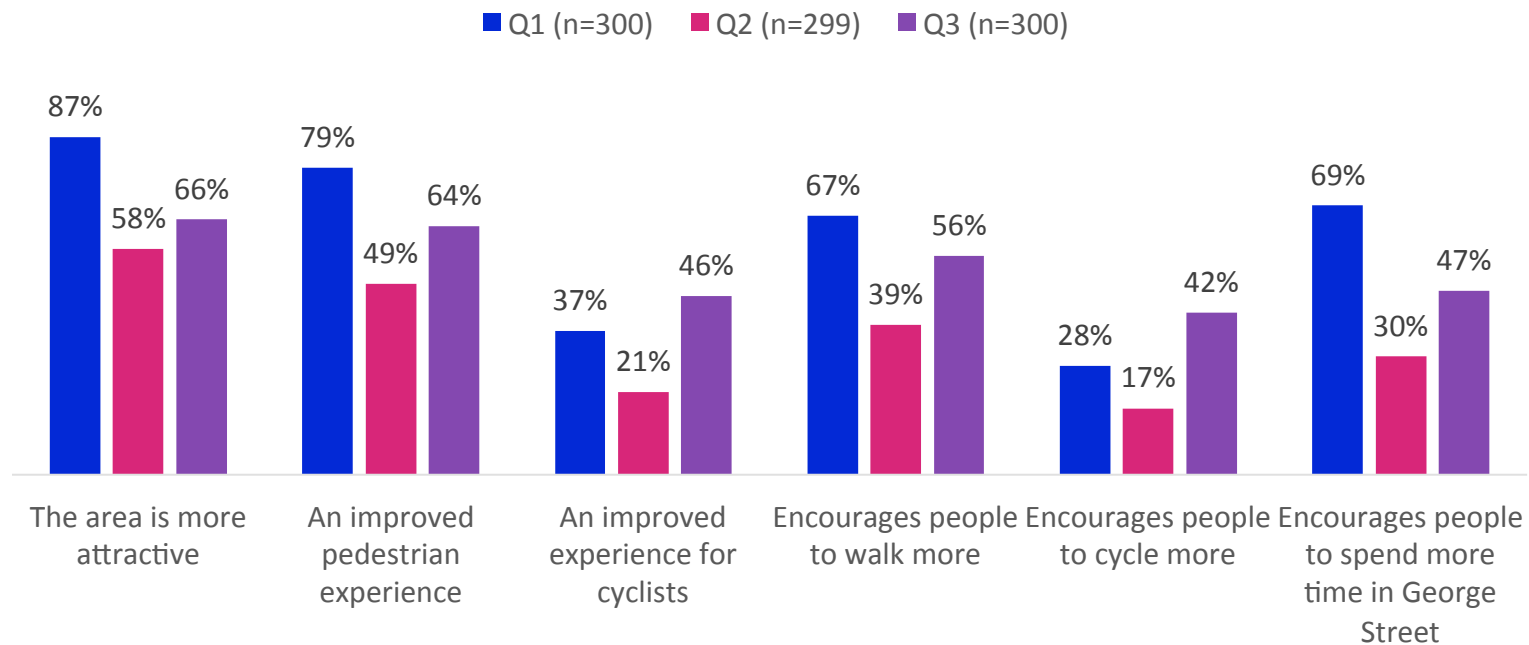
Traffic congestion in side streets. Less safe, confusing for drivers. Area looks poor and boards are hideous.

Don't like outside seating, it obscures buildings. Looks unfinished.

Harder to find parking space and very confusing for drivers.

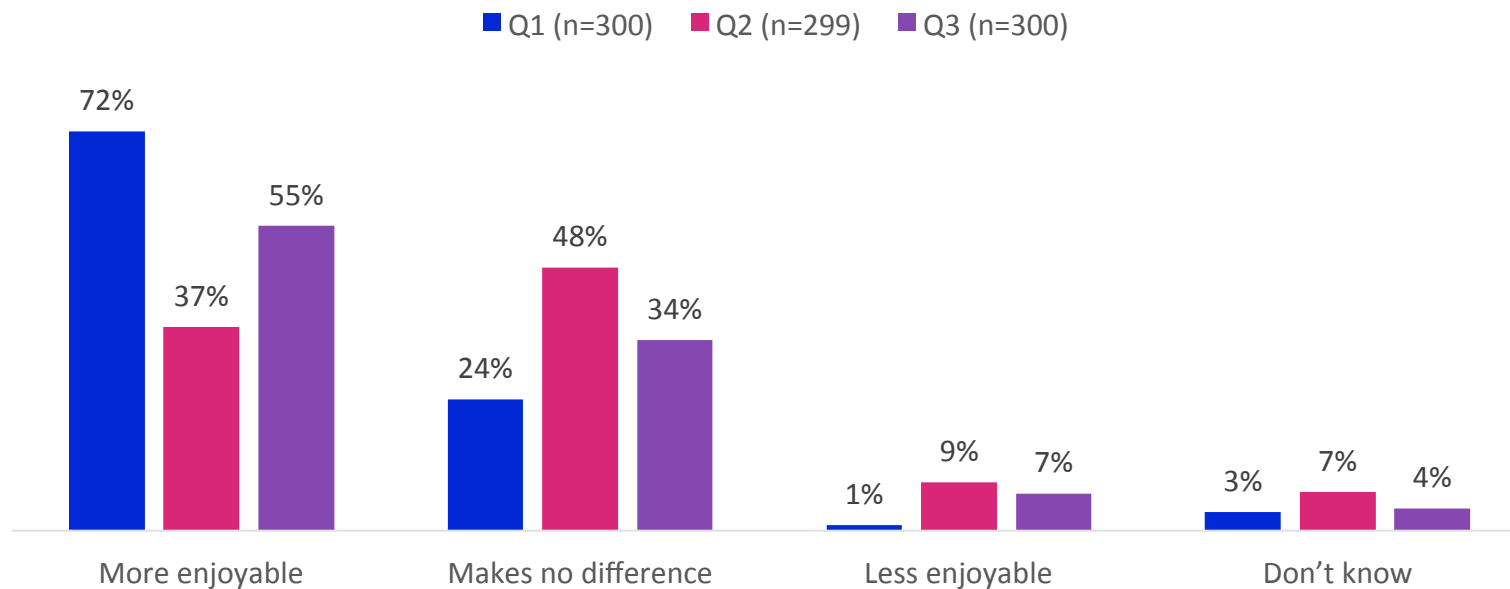
Q3 results are more positive than Q2 in relation to the achievement of project objectives

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



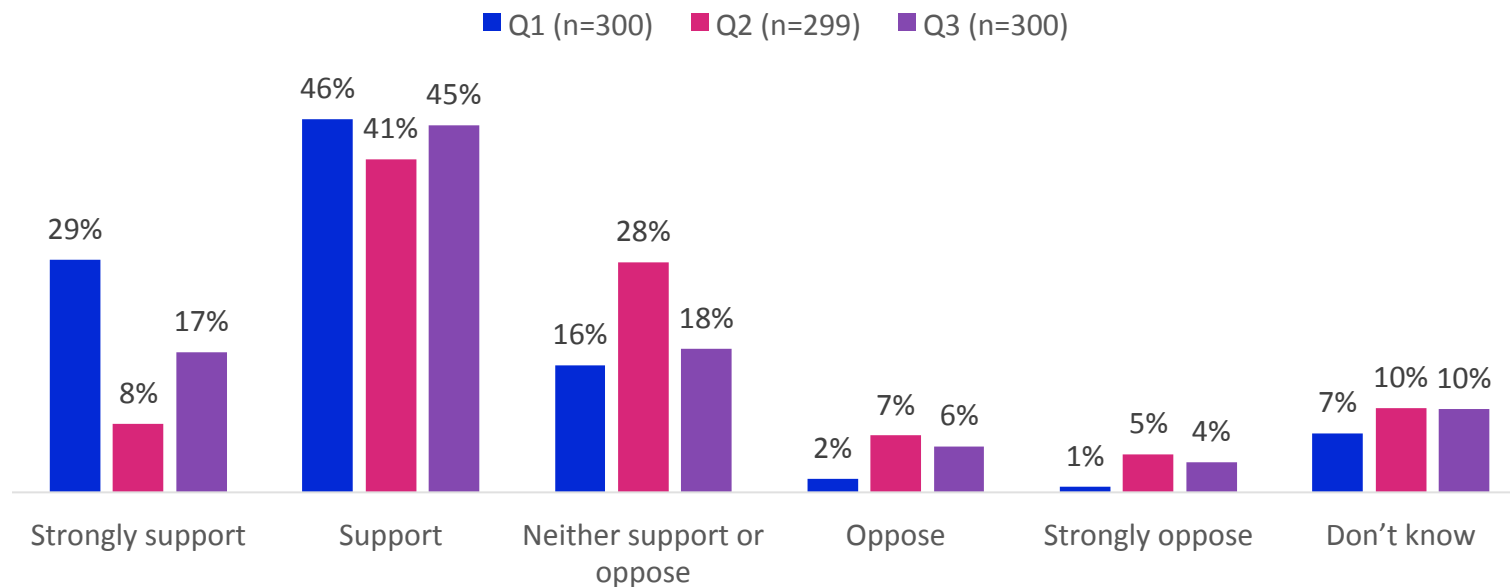
Over half of respondents in Q3 (55%) feel that the changes have made their visit more enjoyable

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



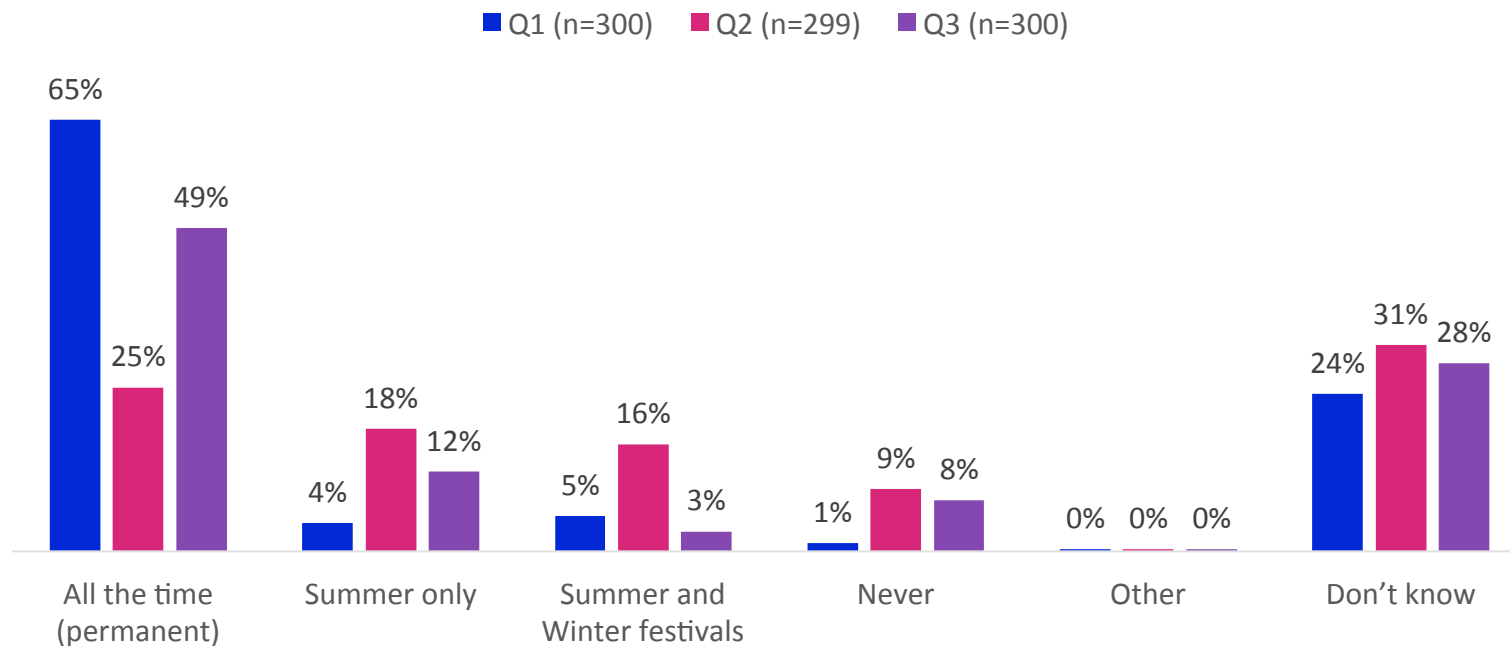
Q3 sees support for the idea of pedestrianised spaces on George Street growing

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



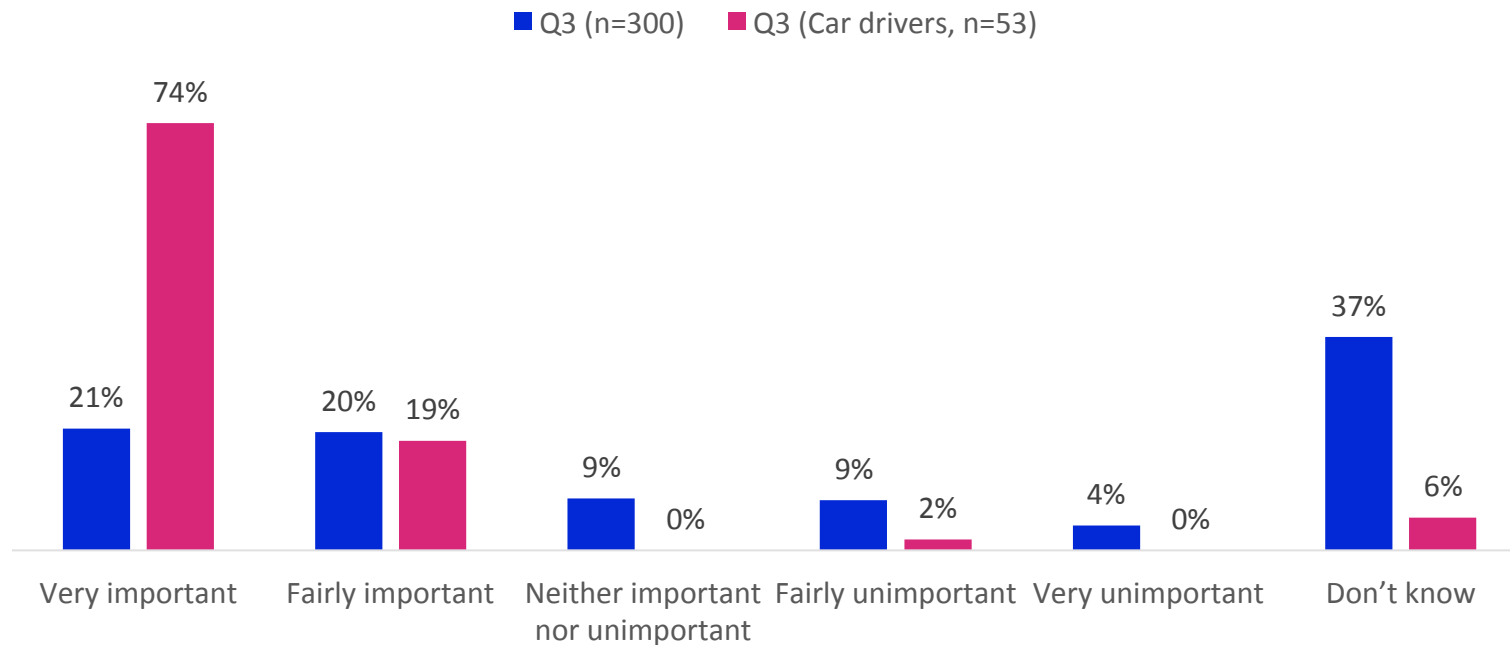
Almost half (49%) are now saying this should be available permanently

Q20 When should pedestrianized areas be made available on George Street?



It is very important for car drivers that parking is available on George Street, not as much for others

Q21 How important do you think it is that car parking continues to be available on George Street?



Summary

- ❑ Quarter 3 results are beginning to show some degree of seasonality
- ❑ There has been an increase in visitors from outwith Edinburgh to George Street
- ❑ Overall satisfaction with George Street is consistently high
- ❑ Cyclist perception is similar to previously, however, there is evidence of more frequent cycling frequency and cyclist now travelling the length of George Street
- ❑ There has been an increase in support for the idea of pedestrianisation of George Street and an increasing desire to see this made permanent.
- ❑ Comments are consistent in that they like the concept but the execution could be tweaked. There is also evidence of optimism for the summer and a vision of how George Street will be a positive draw for visitors then.

Any questions?

