



City of Edinburgh Council

Leith Connections Business Survey

Wave 1

April 2023



# Contents



Project background



Research objectives



Method



Research findings



Summary and conclusions

# Project background

In March 2021 City of Edinburgh Council (CEC) launched its City Mobility Plan (CMP) with the objective of developing the city's transport system to make it safer, more inclusive and more sustainable. The CMP is a key element of the Council's commitment to achieve net zero by 2030.

One of the core elements of the plan is to 'reduce car dependency, promote active travel and increase the quality of public spaces'. Low Traffic Neighbourhood (LTN) schemes were proposed as part of the strategy to deliver on this objective and Leith was identified as an appropriate area to pilot these proposals.

Within Leith, CEC plans to deliver segregated cycling infrastructure; complementary measures, such as improved pedestrians crossings, footways and new placemaking areas with seating and planting; and measures to reduce through traffic. Some measures will be introduced on a trial basis.



The impact of the proposals for Leith will be measured and monitored in a variety of ways, including surveys and qualitative research with Leith residents. CEC also commissioned Progressive to conduct surveys with local businesses.

This report outlines the findings from the first wave of the business survey, conducted in February 2023. This research provides baseline data prior to the introduction of traffic restrictions and the LTN.


# Research objectives

## **Business survey objectives**

- To determine how staff travel to premises
- To determine how customers travel to premises
- To gauge businesses' awareness of the Leith Connections project and its aims and objectives
- To understand business views of the project – its benefits and disbenefits
- To explore views on the local area (aesthetics, safety, transport links, opportunities for customers to linger, whether the local community spaces support the business)
- To evaluate the anticipated impact of the LTN and cycle path on loading activities
- To evaluate the anticipated impact of the LTN and cycle path on customer parking.

# Method

- The data was collected using face-to-face CAPI interviews (computer aided personal interviewing). Respondents who were not able to participate in a face-to-face interview were offered the option to complete the survey online.
- Interviewing was conducted with businesses operating within or near to the Leith Connections area – namely Great Junction Street (between Foot of the Walk and Henderson Street), Henderson Street, the Shore and Sandport Place. All respondents were business owners or managers.
- It was estimated that around 100 businesses operate within the area, and a target was set of 30 completed interviews per wave.
- No quotas were set on sample selection.
- The Wave 1 fieldwork was completed between 14<sup>th</sup> February and 10<sup>th</sup> March 2023:
  - F2F: 14<sup>th</sup>-22<sup>nd</sup> Feb
  - Online: 24<sup>th</sup> Feb-10<sup>th</sup> March.
- In total, 38 businesses were interviewed in person and a further 4 completed an online survey.
- A sample of 42 from a population of approximately 100 provides data with a margin or error of between +/-2.3% and +/- 11.57% at the 95% confidence level (market research industry standard).



# Sample profile

# Sample profile

Location	No.	%
Henderson Street	12	29%
Great Junction Street	10	24%
The Shore	9	21%
Giles Street	4	10%
Sandport Place	2	5%
Dock Street	2	5%
Coburg Street	1	2%
Tolbooth Wynd	-	-
Other	2	5%
<b>Base</b>	<b>42</b>	<b>100%</b>

Business type	No.	%	Groups for analysis
Shop – grocers, convenience store, bakery, butchers, deli, off-licence, supermarket, etc.	6	14%	Shop: 24%
Shop – gifts, clothes, books, electrical, music, etc.	3	7%	
Shop – charity	7	2%	
Food and Drink – Restaurant / Café / Pub (consumed on site)	17	40%	Food and drink: 40%
Takeaway food	-	-	
Service, e.g. laundrette, bank, hairdresser, library, nail bar, travel agent, vet, post office	7	17%	Other: 36%
Leisure, e.g. betting shop, fitness studio	2	5%	
Health, e.g. GP, dentist, optician, pharmacy	1	2%	
Childcare, e.g. nursery, creche facility	-	-	
Other charitable organisation, e.g. foodbank, advice centre	-	-	
Other	5	12%	
<b>Base</b>	<b>42</b>	<b>100%</b>	

# Sample profile

Time trading here	No.	%
Less than 1 year	5	12%
1-2 years	7	17%
3-5 years	4	10%
6-10 years	8	19%
11-20 years	5	12%
Over 20 years	13	31%
<b>Base</b>	<b>42</b>	<b>100%</b>

No. employees	All	%	Busiest day	%
1	6	14%	8	19%
2-3	12	29%	13	31%
4-5	6	14%	7	17%
6+	18	43%	14	33%
<b>Average</b>	<b>8</b>		<b>5.7</b>	
<b>Base</b>	<b>42</b>	<b>100%</b>	<b>42</b>	<b>100%</b>



Research findings: travel to the premises and views of the area

# Staff travel

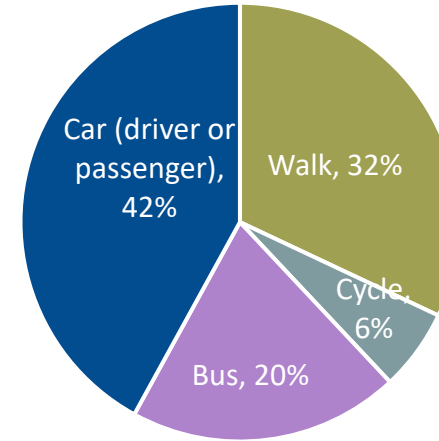
## Mode of transport

- Respondents were asked to estimate the proportion of their staff who travel to work by each mode of transport.
- The averages overall indicate that, across all businesses in the sample, around two fifths of staff travel by car, a third walk and a fifth come by bus.
- Overall, three quarters of respondents mentioned at least some staff travel by car, two thirds on foot, just over half mentioned bus and a quarter had at least some staff who cycle.

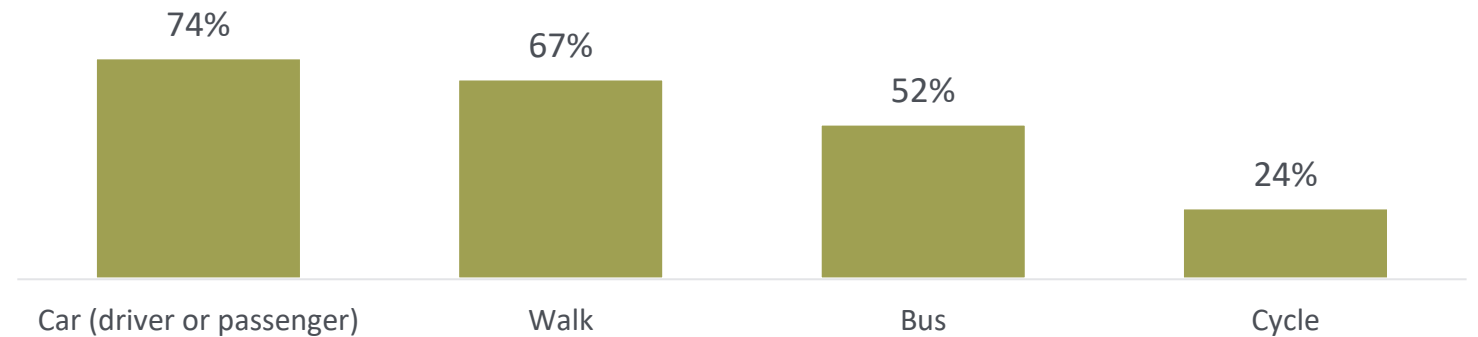


## How staff travel to work

Proportion of employees (average) travelling by each mode



## Proportion mentioning any staff using each mode



Q4: How do staff usually travel to work? Please estimate what percentage travel by each mode on a typical day. Please think about the main mode for each member of staff, i.e. the transport they use for the longest part of their journey.

Base (all): 42

# Customer travel

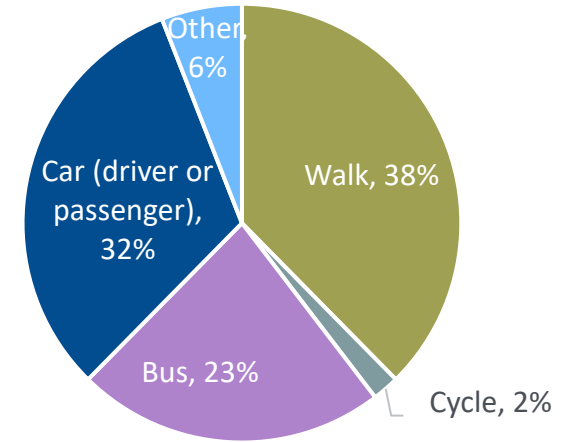
## Mode of transport

- Respondents were also asked to estimate the proportion of their customers who travel to their premises by each mode of transport.
- The average overall indicates that around two fifths of customers walk to businesses in Leith, a third travel by car, and a quarter come by bus.
- Overall, three quarters of respondents mentioned at least some customers travel by car, two thirds on foot, and two thirds mentioned bus.

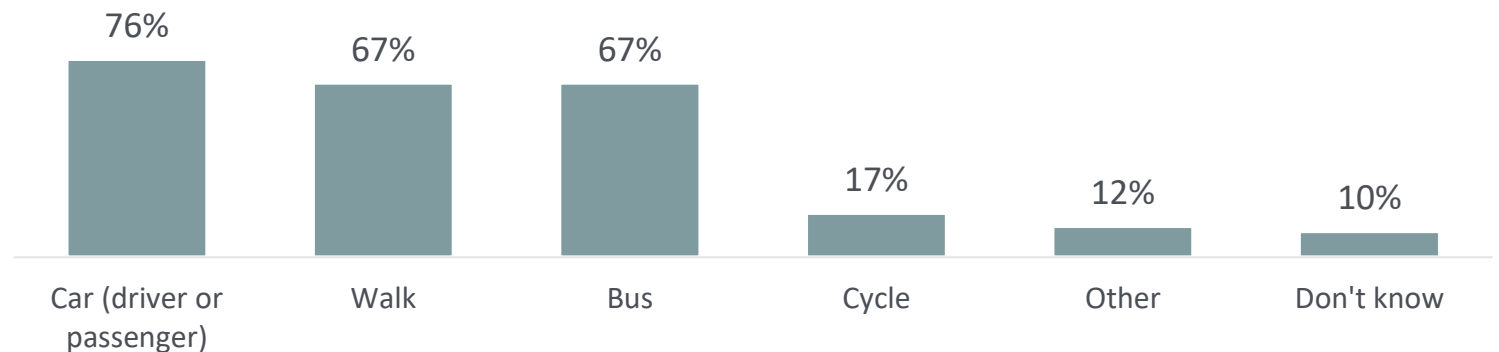
## How customers travel to the premises



Proportion of customers (average) travelling by each mode



Proportion mentioning any customers using each mode



Q5: How do you believe that your customers or business users usually travel to your premises?  
Please estimate what percentage of your customers travel by each mode on a typical day.

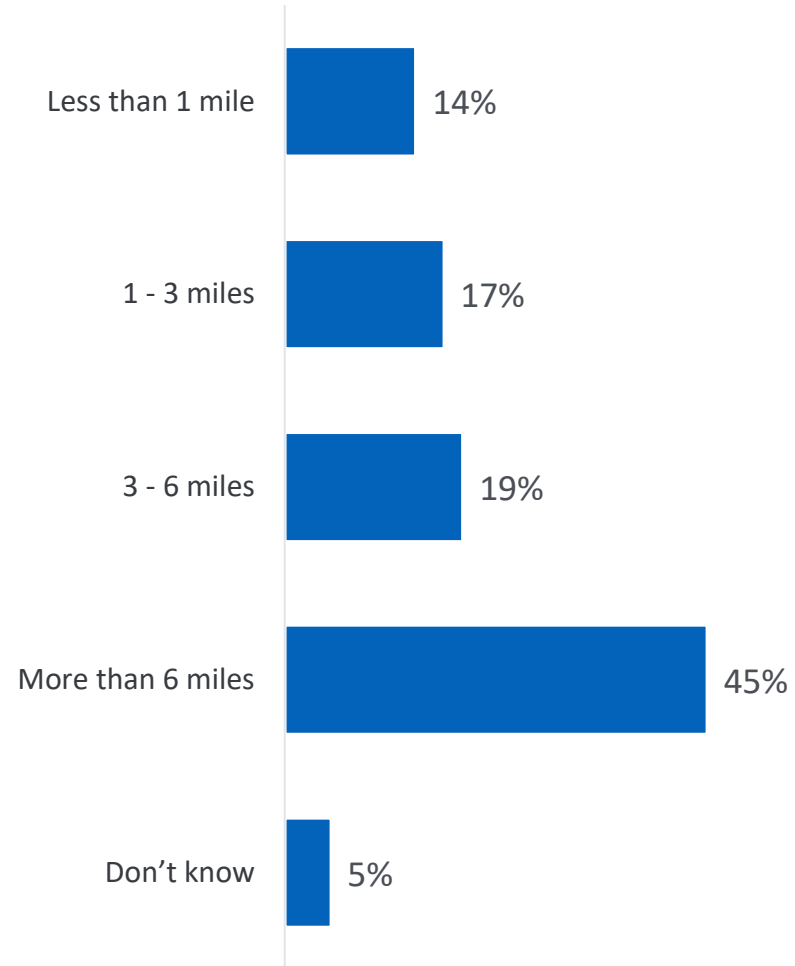
Base (all): 42

# Customer travel

## Distance

- The most common response when asked how far they estimated most of their customers/users travel to their premises was more than 6 miles (45%).
- A further fifth (19%) said most customers travel 3-6 miles, 17% said 1-3 miles and just 14% said most of their customers were very local (travelling less than a mile).
- Shops in the sample tended to have more locally based customers than food and drink businesses (e.g. 6 of the 10 shops said their customers tend to travel three miles or less to their premises, compared to 6 of 17 food and drink businesses who said the same – note the small base sizes, however).

## How far most customers travel to the premises



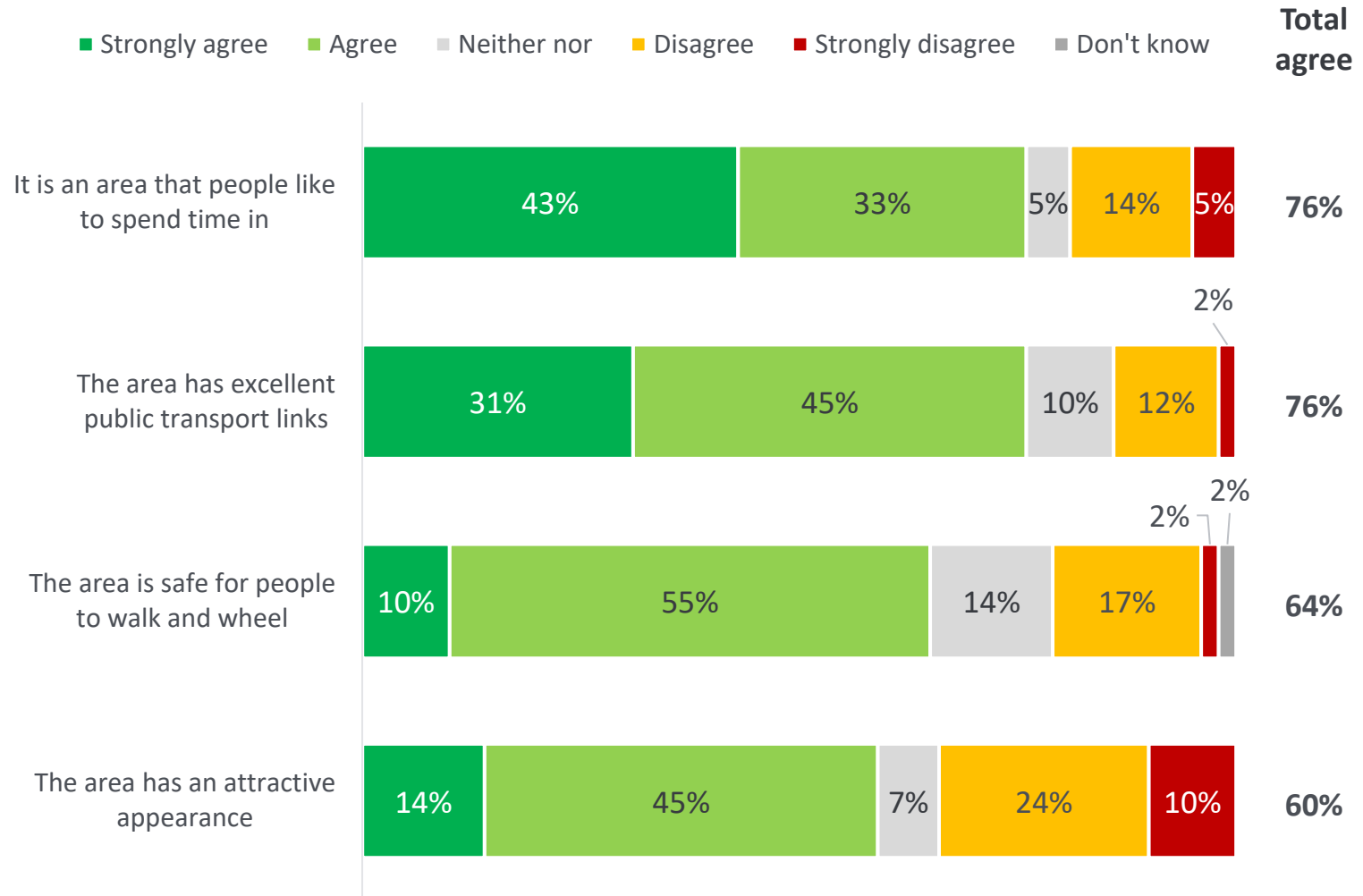
Q6: How far do you estimate most of your customers or business users travel to your premises?

Base (all): 42

# Views of the area

- When asked to rate various aspects of the area around their premises, respondents were most likely to agree that people like to spend time in the area (76% agreed; 43% strongly).
- Three quarters also agreed that the area has excellent public transport links (76% agreed; 31% strongly).
- Around two thirds (64%) agreed the area is safe for people to walk and wheel, and three in five agreed the area has an attractive appearance – although few strongly agreed with these statements.
- It is also worth noting that one third of respondents disagreed that the area of Leith has an attractive appearance.

## Views of the area around your business premises in Leith



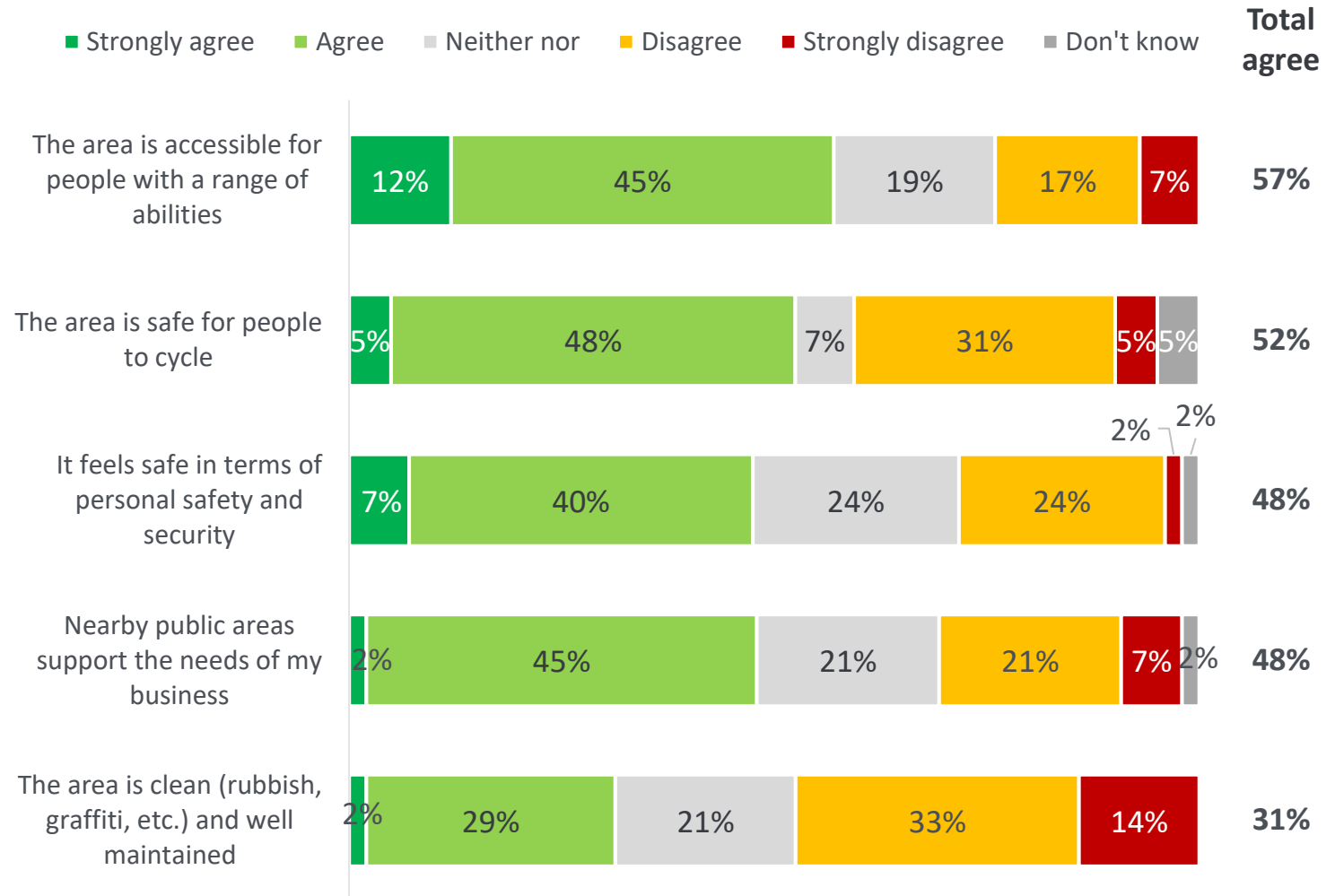
Q7: How much do you agree or disagree with the following statements about the area around your business premises in Leith? Please consider the area shown on this map.

Base (all): 42

# Views of the area

- Agreement was lower in relation to statements on accessibility for people with a range of abilities (57% agreed; 24% disagreed) and that the area is safe for people to cycle (52% agreed; 36% disagreed).
- Fewer than half agreed regarding the area as feeling safe in terms of personal safety and security, and public areas supporting the needs of businesses (48% agreed).
- The lowest rating overall was given in relation to the area being clean and well maintained – only three in ten agreed with this, and almost half disagreed.

## Views of the area around your business premises in Leith



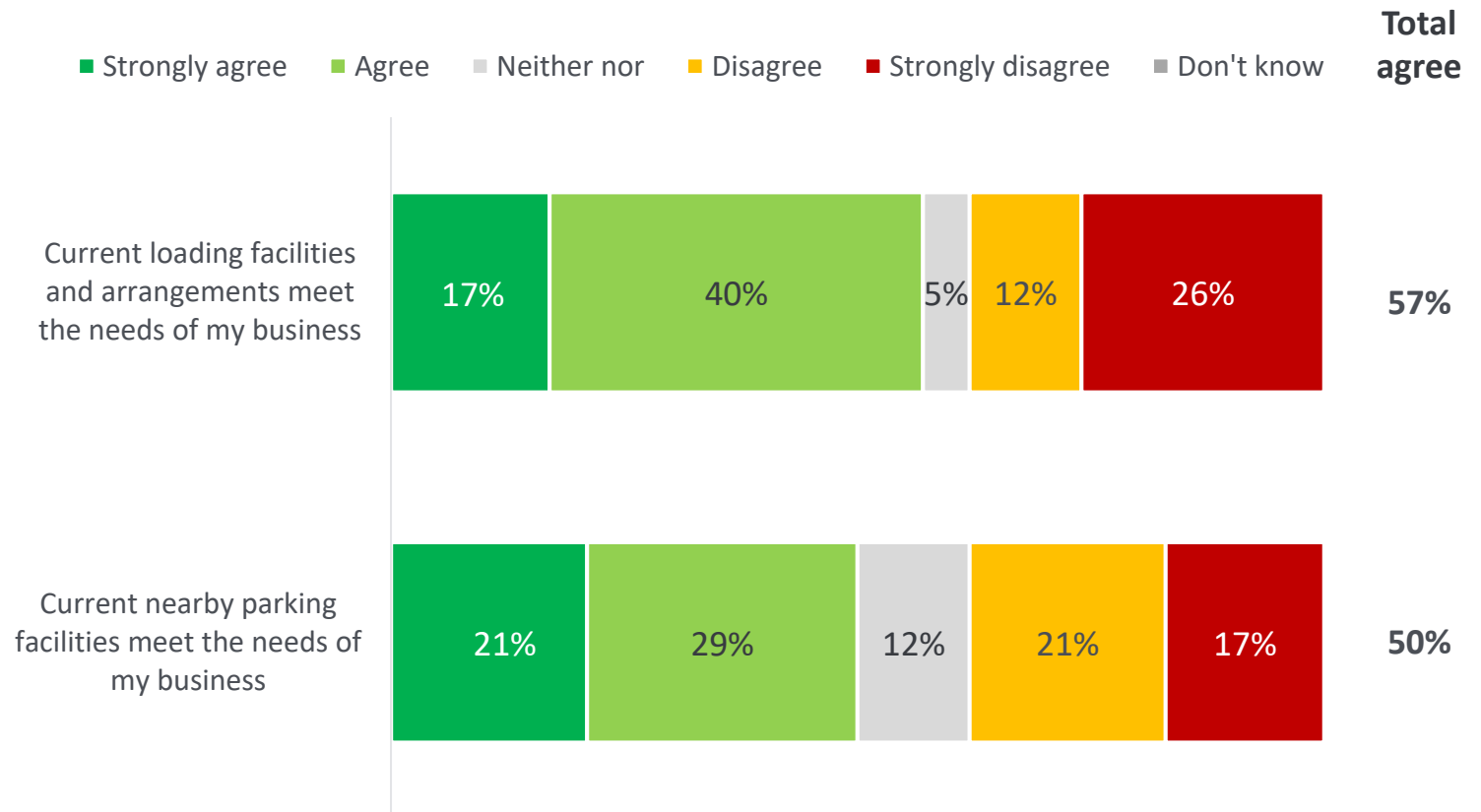
Q7: How much do you agree or disagree with the following statements about the area around your business premises in Leith? Please consider the area shown on this map.

Base (all): 42

# Views of the area

- Just under three fifths (57%) agreed that current loading facilities/arrangements meet the needs of their business, although only 17% agreed strongly and 38% disagreed.
- Half (50%) agreed that nearby parking facilities meet their business needs, with 38% disagreeing.

## Views of loading and parking for the business



Q8: How much do you agree or disagree with the following statements about loading and parking for your business premises in Leith?

Base (all): 42

A vertical yellow bar is positioned to the left of the text.

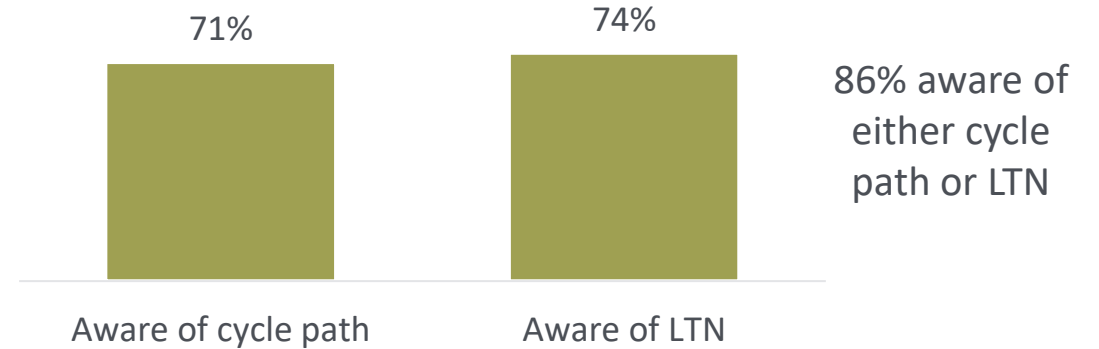
# Research findings: awareness and views on the project proposals



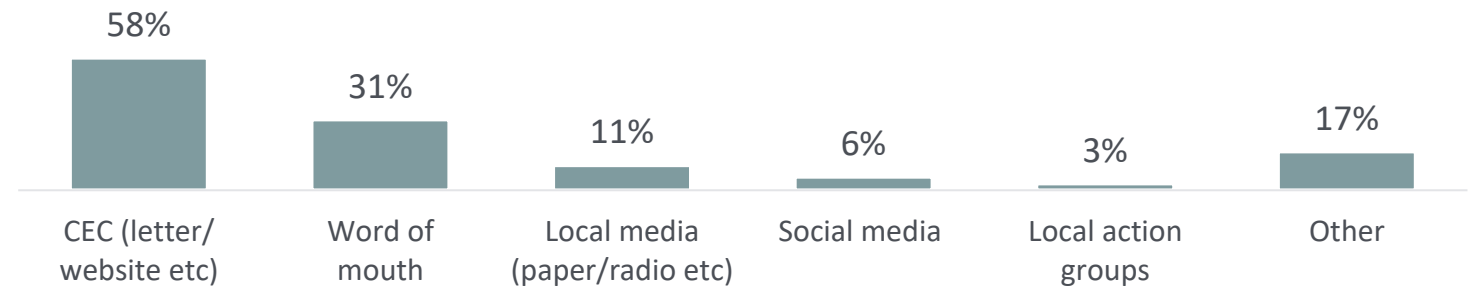
# Awareness of proposals

- Respondents were read a description of the proposals for the Leith LTN and cycle route, and shown maps of the area covered and visual representations of the streetscapes. They were then asked a series of questions about these proposals, starting with previous awareness of them.
- The majority of respondents were aware of the proposed LTN (74%) or cycle path (71%) – and 86% overall were aware of at least one of these.
- Among those who had heard of either aspect, the Council was the most common source of information, followed by word of mouth (note the small base size for this question).

## Awareness of proposed LTN/cycle path



### Source of awareness



Q9: Before today, were you aware of proposals for a cycle route as part of the Leith Connections project? (Show map). Q10: Before today, were you aware of proposals for the low traffic neighbourhood as part of the Leith Connections project? Q11: How did you hear about the Leith Connections project?

Base (all): 42

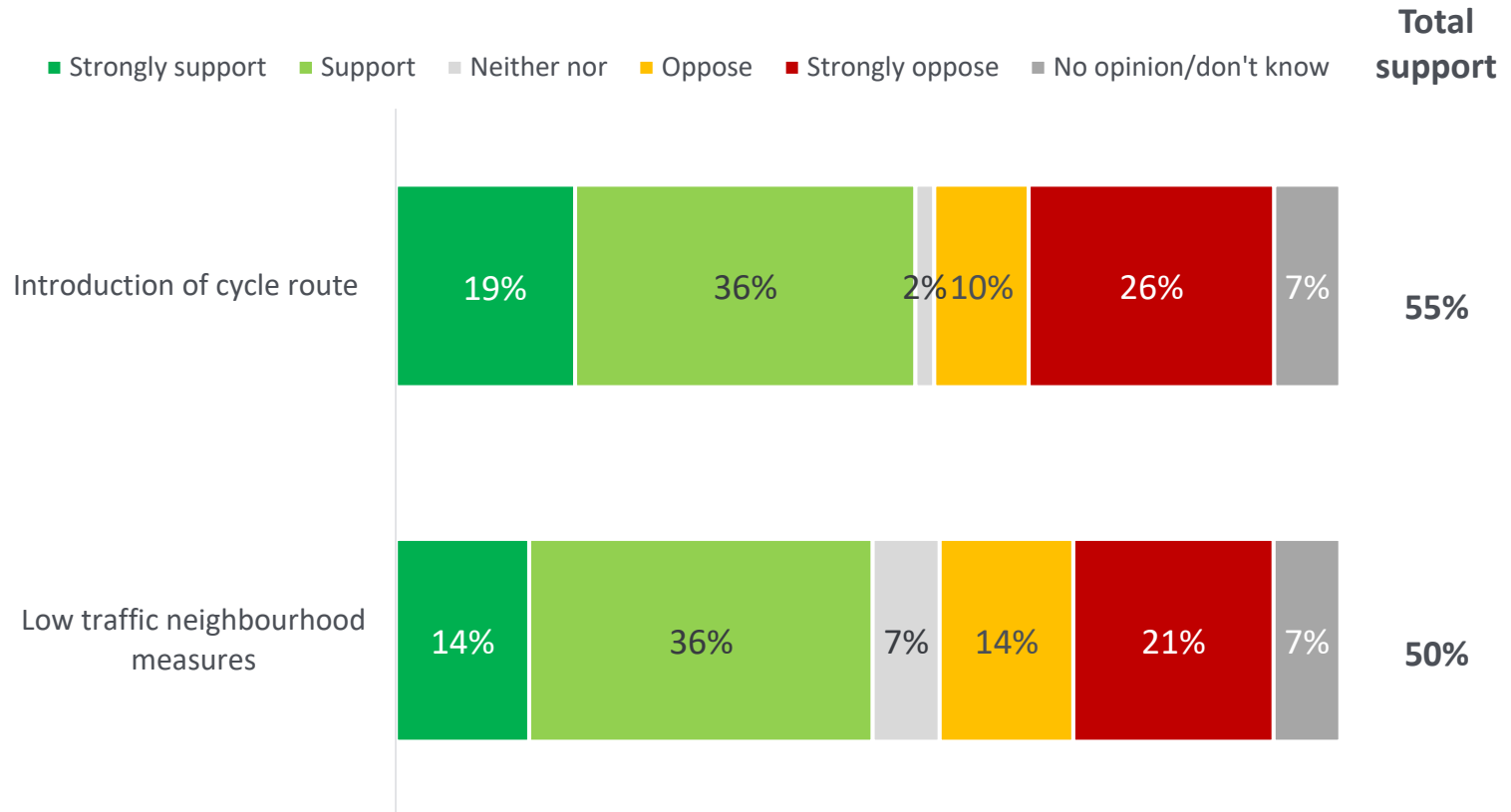
Base (all aware of the project): 36



# Support for the scheme

- Just over half (55%) said they support the introduction of the cycle route, and half (50%) support the LTN measures.
- For both aspects, levels of strong support was relatively low (19% for the cycle route, 14% for LTN measures), whereas those expressing opposition tended to strongly oppose it (26% strongly oppose the cycle route; 21% strongly oppose LTN measures).
- Shops in the sample tended to be less positive than food and drink businesses about the proposals: 7 of the 10 shops opposed the cycle route and 6 opposed the LTN measures, while just 3 of the 17 food and drink businesses opposed the cycle route and 3 opposed the LTN measures. Please note the very small base sizes, however. Also note that the shops in the sample tended to be located in Great Junction Street (6 of 10 shops were on this street) while food and drink businesses were most likely to be on The Shore (8 of 17). Responses could be affected by business location as well as business type so results should be treated with caution.

## Support for the proposals



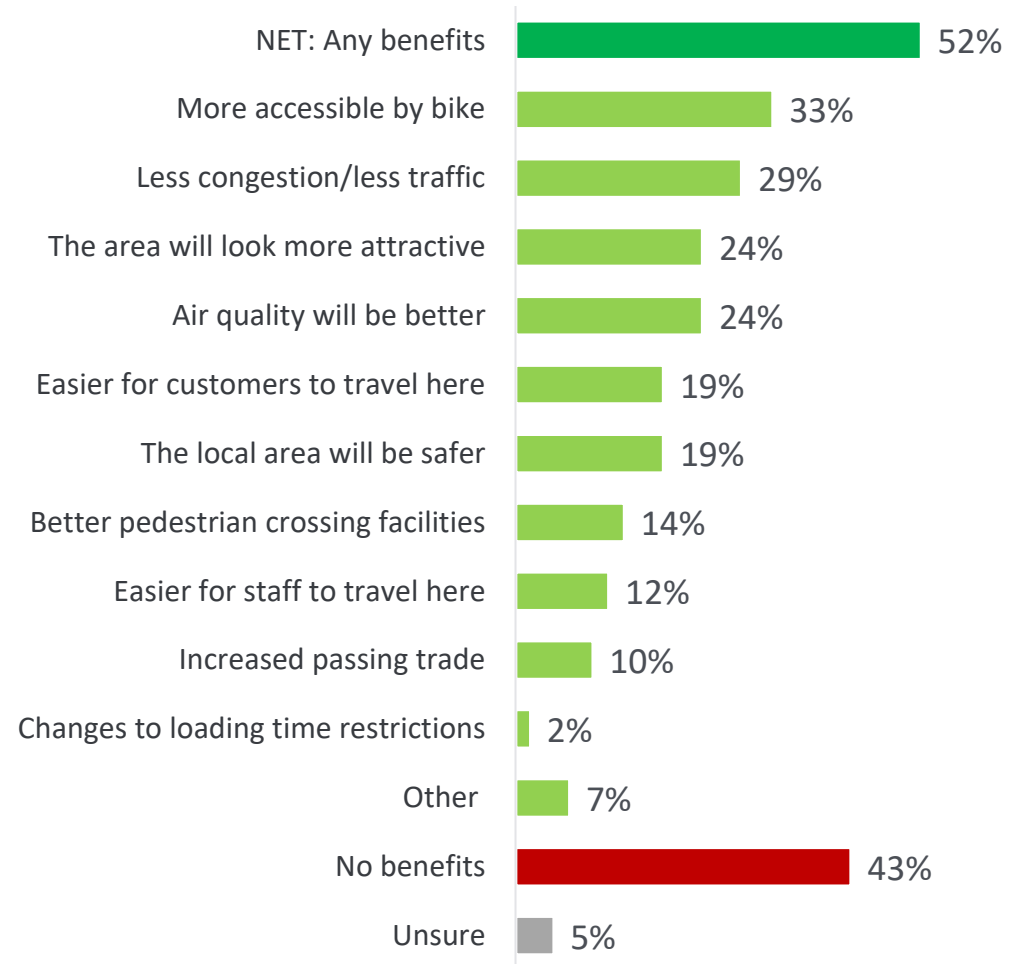
Q12: Do you, as a business, support or oppose the introduction of a cycle route from Foot of the Walk to Dock Street via Henderson Street? Q13: Do you, as a business, support or oppose the measures that will be put in place for the low traffic neighbourhood?

# Cycle path

## Benefits

- Respondents were asked if they anticipated any benefits to their business when the cycle route is completed.
- Just over half identified any benefits of the cycle route – these were most likely to be making the area more accessible by bike (mentioned by 33%), and having less congestion/traffic (29%).
- Around a quarter also mentioned the area looking more attractive, and air quality being better (both 24%).

## Benefits of cycle route



Q14: Do you think there will be any benefits to your business once the cycle route is complete?

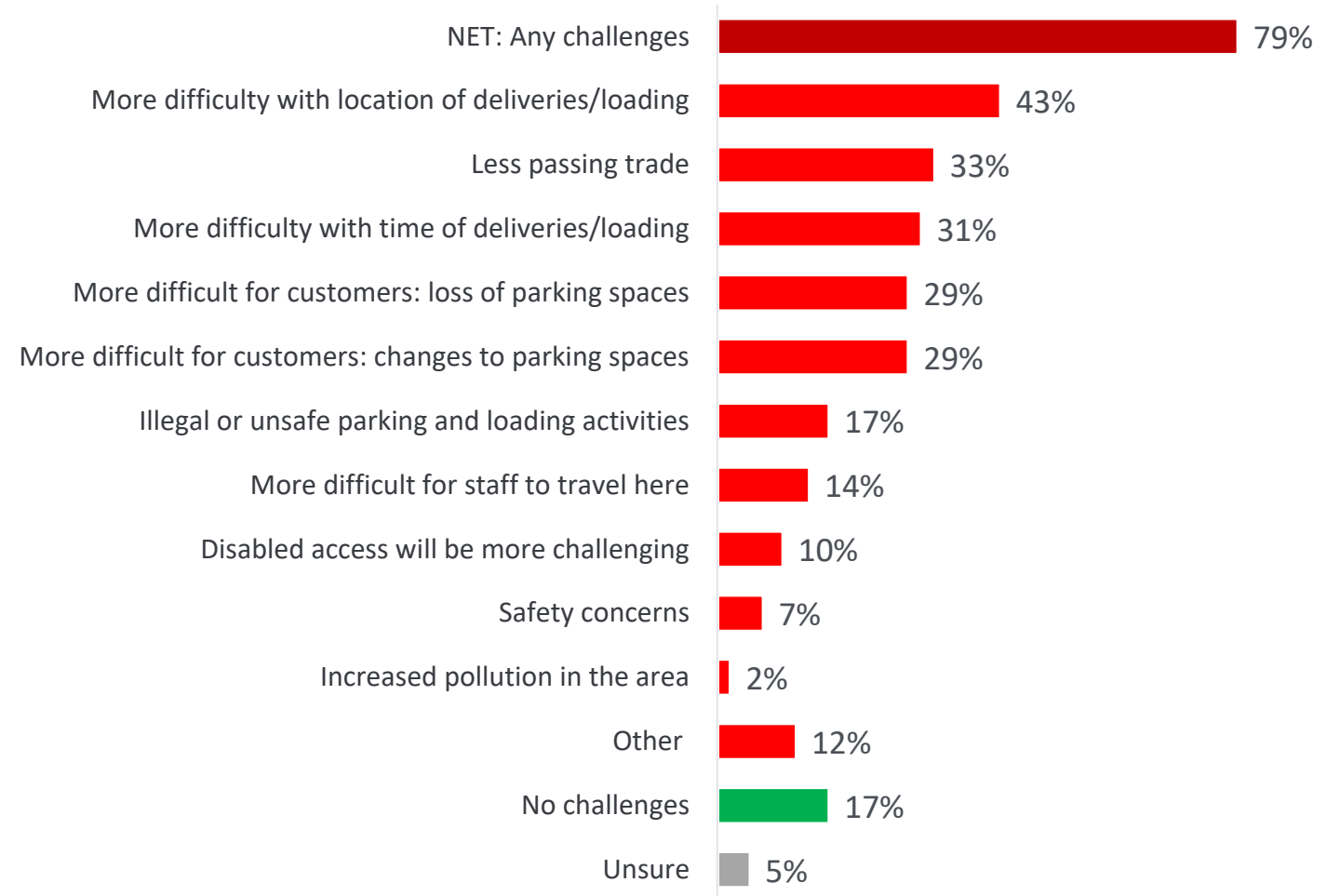
Base (all): 42

# Cycle path

## Challenges

- The survey also asked respondents whether the cycle route was likely to pose any challenges to their business.
- Almost four in five (79%) identified any challenge associated with the cycle route, therefore, respondents were more likely to anticipate issues when the cycle route is introduced than benefits.
- The most commonly mentioned issue was more difficulty with location of deliveries/loading (43%).
- A third had concerns about less passing trade (33%), while around three in ten also mentioned difficulties with the times of deliveries/loading (31%), loss of parking spaces for customers and changes to parking spaces for customers (both 29%).

## Challenges of cycle route



Q15: Do you think there will be any challenges to your business once the cycle route is complete?

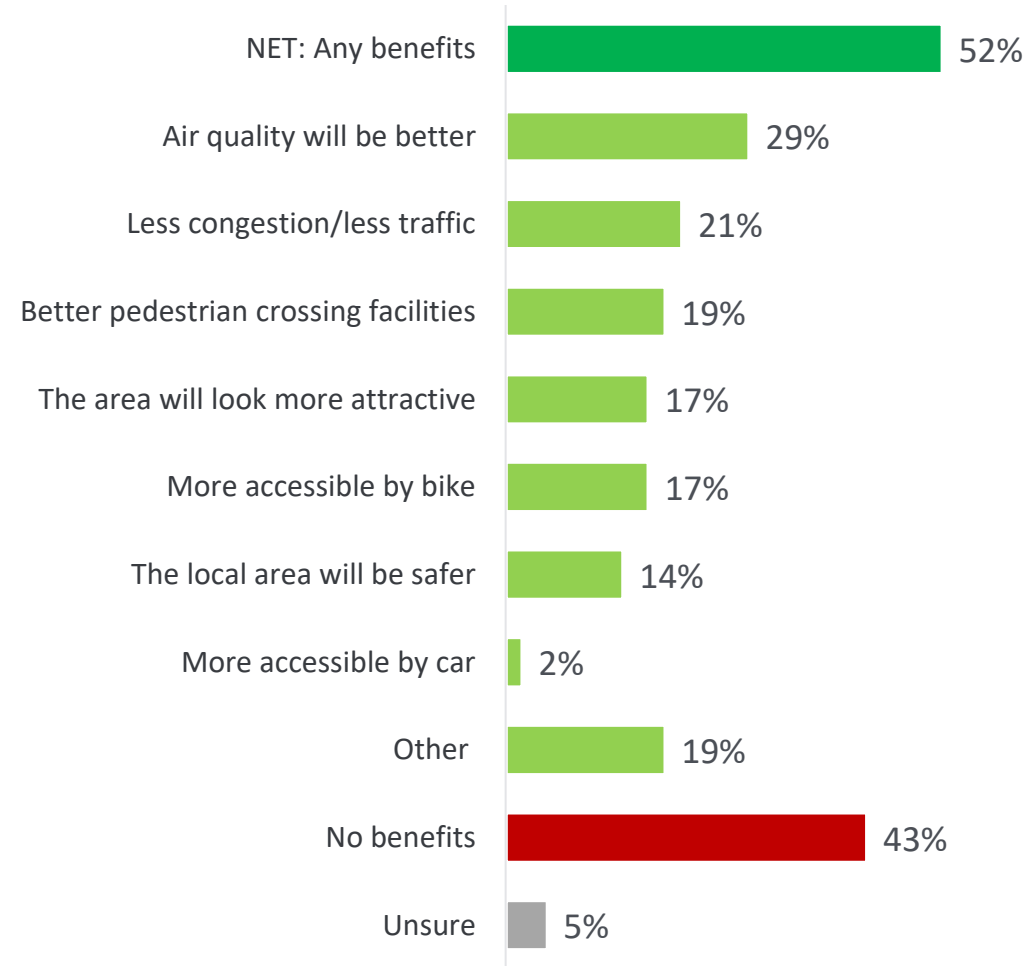
Base (all): 42

# LTN

## Benefits

- Respondents were also asked to comment on anticipated benefits and challenges for their business of the low traffic neighbourhood plans.
- Just over half identified any benefits of the LTN plans – these were most likely to be better air quality (20%) and having less congestion/traffic (21%).
- Just under a fifth mentioned better pedestrian crossing facilities (19%), the area looking more attractive (17%), and being more accessible by bike (17%).

## Benefits of LTN measures



Q17: Do you think there will be any benefits to your business from the low traffic neighbourhood plans?

Base (all): 42

## Challenges

- Almost four in five (79%) identified any challenge associated with the LTN plans, which again indicates that business respondents were more likely to have concerns about the proposals than anticipated benefits.
- The most commonly mentioned issues were difficulties for customers because of changes to parking spaces (36%) or loss of parking spaces (33%) and concerns about less passing trade (33%).
- Around a quarter mentioned difficulties for staff travelling to the business (24%).

## Challenges of LTN measures



Q18: Do you think there will be any challenges to your business from the low traffic neighbourhood plans?

Base (all): 42

# Cycle path

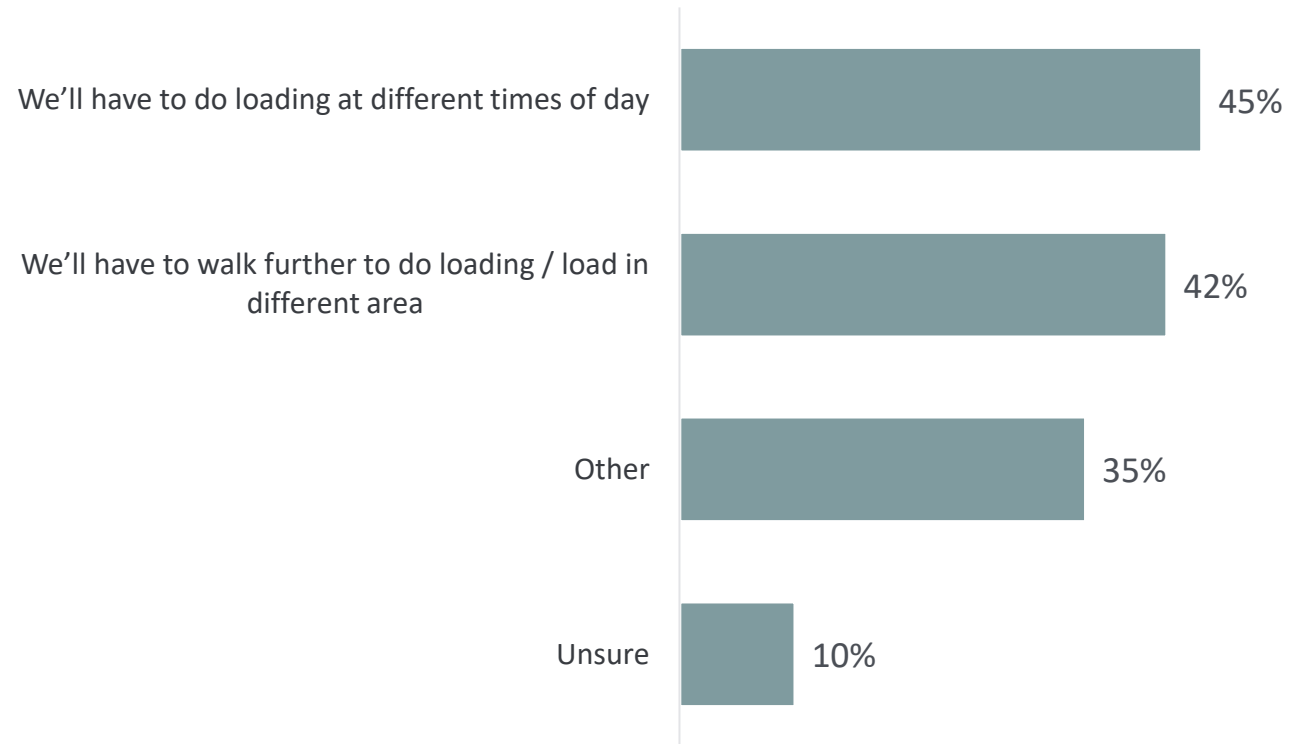
## Impact on loading

- Three quarters of respondents (74%) said the cycle route will have any impact on deliveries/loading.
- Among these, the most common anticipated impact was that they would have to do loading at different times of day (45% of the 31 respondents affected) and/or they will have to walk further/load in a different area (42% of the 31 respondents). Please note the small base size for this question.

## Impact of cycle route on deliveries and loading



31 respondents (74%) said the cycle route will have any impact on deliveries and loading for their premises.



Q20: Do you think the cycle route will have any impact on deliveries and loading for your premises once it is complete? Q21: How do you think deliveries and loading for your premises will be affected?

Base (all): 42

Base (all answering yes at Q20): 31



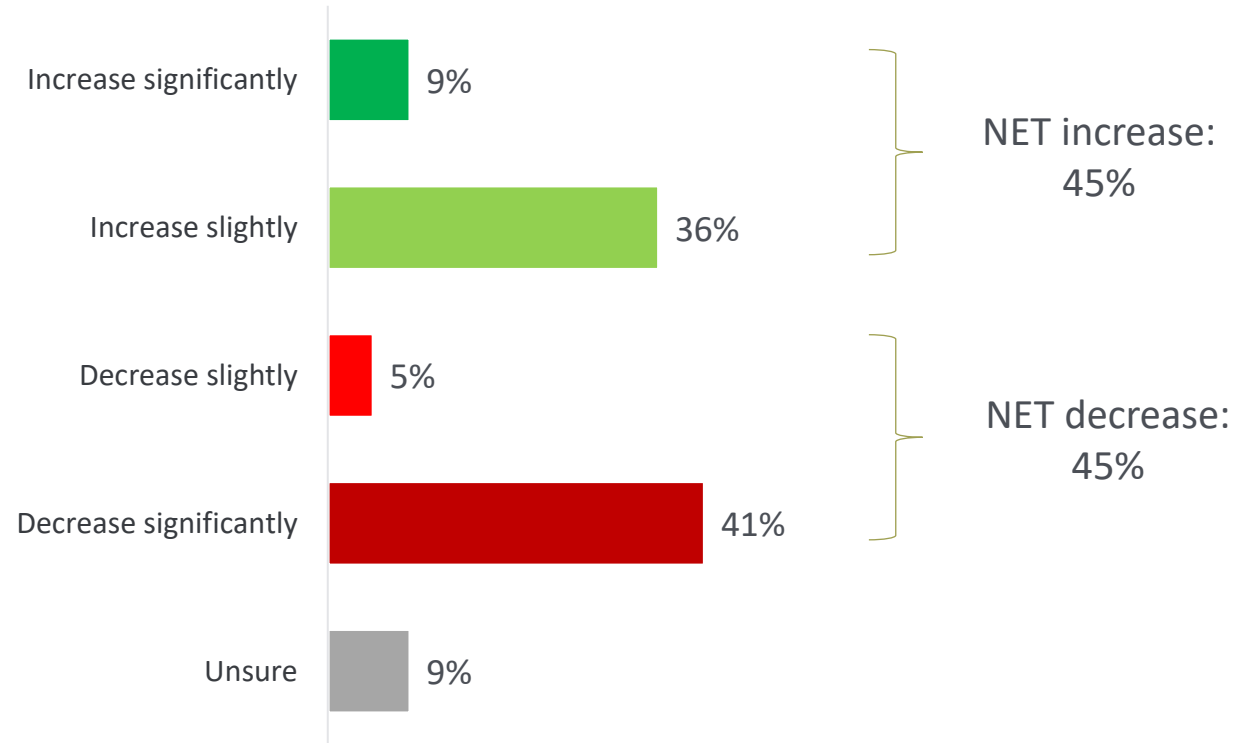
## Impact on footfall

- Around half (52%) said that they thought the Leith Connections plans will have an impact on footfall to their premises.
- Among these respondents, views were evenly split about whether they would see a net increase or decrease in footfall – although the most common response was that there would be a significant decrease (mentioned by 41% of these 22 people). Please note the very small base size for this question.
- Amongst those who expected a change in footfall, shops tended to expect a decrease while food and drink businesses expected an increase. However, note the extremely small base sizes for this question (6 of 8 shops expected an increase while 7 of 10 food and drink businesses expected an increase – see also the earlier information on location of businesses, which could have an impact on responses as well as business type).

## Impact of LTN/cycle route on footfall



22 respondents (52%) said the Leith Connections plans will have any impact on footfall into their premises.



Q22: Do you think the cycle route and/or the measures being introduced for the low traffic neighbourhood will have any impact on footfall into your premises once it is complete? Q23. How do you think footfall into your premises will be affected?

Base (all): 42

Base (all answering yes at Q22): 22





# Other comments – examples of feedback received

*Totally for it cycle routes and pedestrians as long as traffic and pick up and loading is okay.*

*Big companies will still park and load, there is nothing they can do if you need large deliveries. There should have specific times. Small cafes and shops need to use fresh food every day.*

*It's a good idea. It will be good for people to have somewhere to stop.*

*More pedestrian friendly as long as cyclists use the cycle lane, not footpaths. As long as business users adhere to the restrictions and don't park in cycle lanes. people should obey the rules.*

*Current loading restriction are largely ignored by delivery drivers. If you want to ensure loading restrictions are adhered to and only loading bays are used for loading, I would suggest making the route an urban clearway or similar, and making the penalties for ignoring restrictions clear.*

*It will be a neutral effect. We are pushing the problem away from the area and making more congestion along arterial routes through Leith, Commercial and Salamander St. and Gt Junction St.*

*Customers will be able to get here but might moan about access.*

*Prior to today I was under the impression Coburg street was being closed at the Ferry Rd end rather than Dock St. we get deliveries and collections on articulated lorries. While I understand the logic behind closing at Dock St, I do have some concerns about the ability of lorries to turn into the Ferry Rd end of Coburg St from North Junction St or Great Junction St.*

*Whilst in support of traffic reduction methods I feel that the current proposal is ill thought out. Loading bays need to be near the businesses not on the opposite side of road for example. Removing public transport and placing it further away from so many businesses which rely on it is thoughtless. There needs to be more in depth planning on the scheme. Bottlenecks are apparent already as we have witnessed during the lengthy tram works.*

*Support the idea, however the closing off and dead ending of current public transport routes and traffic routes I feel will only push traffic onto already overburdened routes, whilst making access to local business more difficult therefore putting a burden on them and prospective/existing clients.*



# Summary and conclusions

# Summary and conclusions

- The purpose of this study was to provide a baseline data set to determine the views, opinions and experiences of businesses in the Leith Connections area.

## **Current views of the area**

- When asked to rate various aspects of the area around their premises, respondents were most likely to agree that people like to spend time in the area, that there are excellent public transport links, the area is safe for people to walk and wheel, and the area has an attractive appearance.
- Agreement was lower in relation to accessibility for people with a range of abilities, that the area is safe for people to cycle, the area feeling safe in terms of personal safety and security, and public areas supporting the needs of businesses – and the lowest rating overall was given in relation to the area being clean and well maintained.
- Just under three fifths agreed that current loading facilities/arrangements meet the needs of their business; half agreed that nearby parking facilities meet their business needs.

## **Awareness and views of the Leith Connections project**

- The majority were aware of the LTN and/or proposed cycle path, and the Council was the most common source of information about these measures, followed by word of mouth.
- Just over half said they support the introduction of the cycle route, and half support the LTN measures.
- Just over half identified any benefit of the cycle route (most likely making the area more accessible by bike an/or having less congestion/traffic); the same proportion identified any benefit of the LTN measures (most likely better air quality and less congestion/traffic).
- However, almost four in five identified any challenges associated with both measures. For the cycle lane this was most likely to be difficulty with location of deliveries/loading, concerns about less passing trade, whilst for the LTN measures this was most likely to relate to difficulties for customers because of changes to parking spaces/loss of parking spaces, and again concerns about less passing trade.
- Future waves will monitor these views once the Leith Connections project measures are implemented.

# Key contacts

## Contact

### **Diane McGregor**

diane.mcgregor@progressivepartnership.co.uk

### **Ruth Bryan**

ruth.bryan@progressivepartnership.co.uk

### **Progressive Partnership**

Q Court, 3 Quality Street  
Edinburgh,  
EH4 5BP

0131 316 1900

[info@progressivepartnership.co.uk](mailto:info@progressivepartnership.co.uk)

# Technical appendix

The data was collected by face-to-face CAPI interviews and via online survey for those who requested a link.

The target groups for this research study were business owners in the Leith Connections area.

The sample type was probability. Interviewers visited business addresses in the streets specified. No quotas were set.

The target sample size was 30; the final achieved sample size was 42.

Fieldwork was undertaken between 14<sup>th</sup> February and 10<sup>th</sup> March 2023. In total, 4 interviewers worked on data collection.

Each interviewer's work is validated as per the requirements of the international standard ISO 20252. Validation was achieved by re-contacting (by telephone or email) a minimum of 10% of the sample to check profiling details and to re-ask key questions from the survey. Where telephone details were not available re-contact may have been made by post. All interviewers working on the study were subject to validation of their work.

The overall sample size of 42 from a population of around 100 provides a dataset with an approximate margin of error of between +/-2.3% and +/- 11.57%, calculated at the 95% confidence level (market research industry standard).

Our data processing department undertakes a number of quality checks on the data to ensure its validity and integrity.

For **CAPI Questionnaires** these checks include:

- Responses are checked to ensure that interviewer and location are identifiable. Any errors or omissions detected at this stage are referred back to the field department, who are required to re-contact interviewers to check.
- A computer edit of the data carried out prior to analysis involves both range and inter-field checks. Any further inconsistencies identified at this stage are investigated by reference back to the raw data on the questionnaire.
- Where "other" type questions are used, the responses to these are checked against the parent question for possible up-coding.
- Responses to open-ended questions will normally be spell and sense checked. Where required these responses may be grouped using a code-frame which can be used in analysis.
- All research projects undertaken by Progressive comply fully with the requirements of ISO 20252.