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City of Edinburgh Council

Leith Connections Business Survey

Wave 2

May 2024

Leith Connections

MRS Evidence Matters

CYBER ESSENTIALS

MARKET RESEARCH SERVICES ISO 20252

UKAS PRODUCT CERTIFICATION 036

Contents

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Project background

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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.

Measures were introduced in Leith in Spring 2023 to reduce traffic and improve pedestrian crossings and community spaces (some were on a trial basis). Future plans include an active travel corridor and segregated cycling infrastructure.

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The impact of the proposals for Leith is being 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 second wave of the business survey, conducted in April/May 2024. Baseline data from the first wave, conducted in February 2023, prior to the introduction of the traffic restrictions and the LTN, is also included.

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
- To understand business views of the project – its benefits and disbenefits
- To explore views of the local area (aesthetics, safety, transport links, opportunities for customers to linger, whether the local community spaces support the business)
- To evaluate the impact of the LTN on loading activities
- To evaluate the impact of the LTN on customer parking.

Method

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- 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.
- Wave 1 fieldwork was completed between 14th February and 10th March 2023. Wave 2 fieldwork was completed between 20th April and 4th May 2024.
- Sample sizes and margins of error are outlined below for each wave:

Wave	F2F	Online	Total	Margin of error
Wave 1	38	4	42	Between +/-2.3% and +/-11.57%
Wave 2	46	1	47	Between +/-2.08 and +/-10.46%

- Please note that sample sizes are small, so data should be treated with caution. Significance testing has been conducted to the 90% level due to the small base sizes. Very small bases are flagged with a caution symbol.

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Sample profile

Sample profile

Location	W1 No.	W1 %	W2 No.	W2 %
Henderson Street	12	29%	12	26%
Great Junction Street	10	24%	18	38%
The Shore	9	21%	6	13%
Other*	11	26%	11	23%
Base	**42**	**100%**	**47**	**100%**

* 'Other' locations:
W1: Giles St., Sandport Place, Dock St., Coburg St., Sandport Street, Quayside Street
W2: Constitution Street, Duke Street, Henderson Gardens, John's Place, Queen Charlotte Street

Business type	W1 No.	W1 %	W1	W2 No.	W2 %	W2
Shop – grocers, convenience store, bakery, butchers, deli, off-licence, supermarket, etc.	6	14%	Shop: 24%	7	15%	Shop: 34%
Shop – gifts, clothes, books, electrical, music, etc.	3	7%		9	19%	
Shop – charity	7	2%		-	-	
Food and drink – restaurant / café / pub (consumed on site)	17	40%	Food and drink: 40%	14	30%	Food and drink: 36%
Takeaway food	-	-		3	6%	
Service, e.g. laundrette, bank, hairdresser, library, nail bar, travel agent, vet, post office	7	17%	Other: 36%	6	13%	Other: 30%
Leisure, e.g. betting shop, fitness studio	2	5%		1	2%	
Health, e.g. GP, dentist, optician, pharmacy	1	2%		1	2%	
Other charitable organisation, e.g. foodbank, advice centre	-	-		1	2%	
Other	5	12%		5	11%	
Base	**42**	**100%**	**100%**	**47**	**100%**	**100%**

Sample profile

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Time trading here	W1 No.	W1 %	W2 No.	W2 %
Less than 1 year	5	12%	3	6%
1-2 years	7	17%	2	4%
3-5 years	4	10%	16	34%
6-10 years	8	19%	15	32%
11-20 years	5	12%	6	13%
Over 20 years	13	31%	5	11%
Base	**42**	**100%**	**47**	**100%**

	Total number of employees				No. employees usually travel to premises on busiest day of week			
No. employees	**W1 No.**	**W1 %**	**W2 No.**	**W2 %**	**W1 No.**	**W1 %**	**W2 No.**	**W2 %**
1	6	14%	3	6	8	19%	7	15%
2-3	12	29%	19	40	13	31%	22	47%
4-5	6	14%	13	28	7	17%	7	15%
6+	18	43%	12	26	14	33%	11	23%
Average	***8***		***5.2***		***5.7***		***4.3***	
Base	**42**	**100%**	**47**	**100%**	**42**	**100%**	**47**	**100%**

Q2: How many employees do you have at this location?
Q3: How many employees usually travel to these premises on the busiest day of the week?

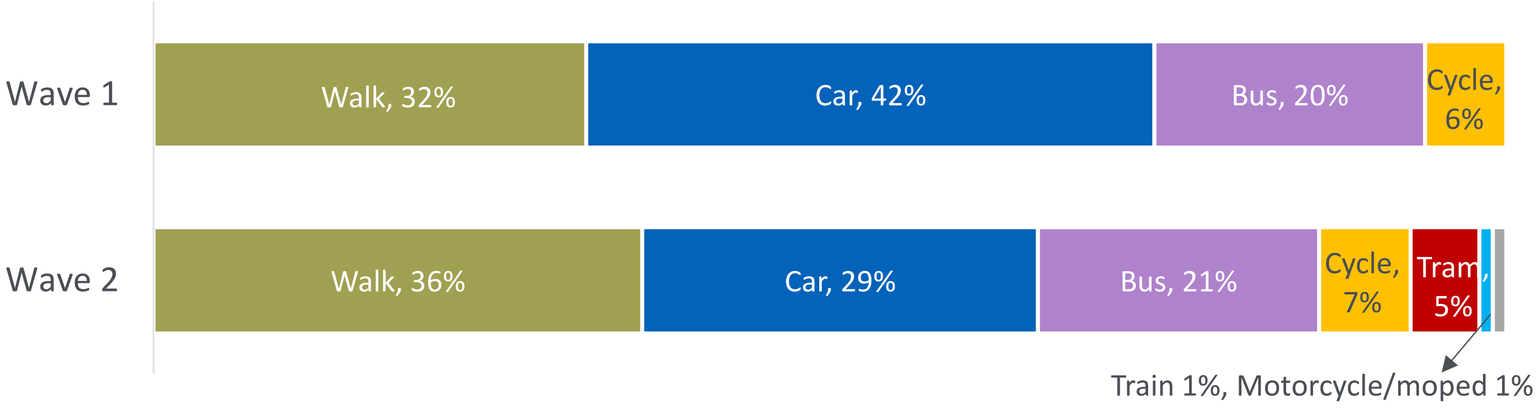
Research findings: travel to the premises and views of the area

Staff travel
Mode of transport

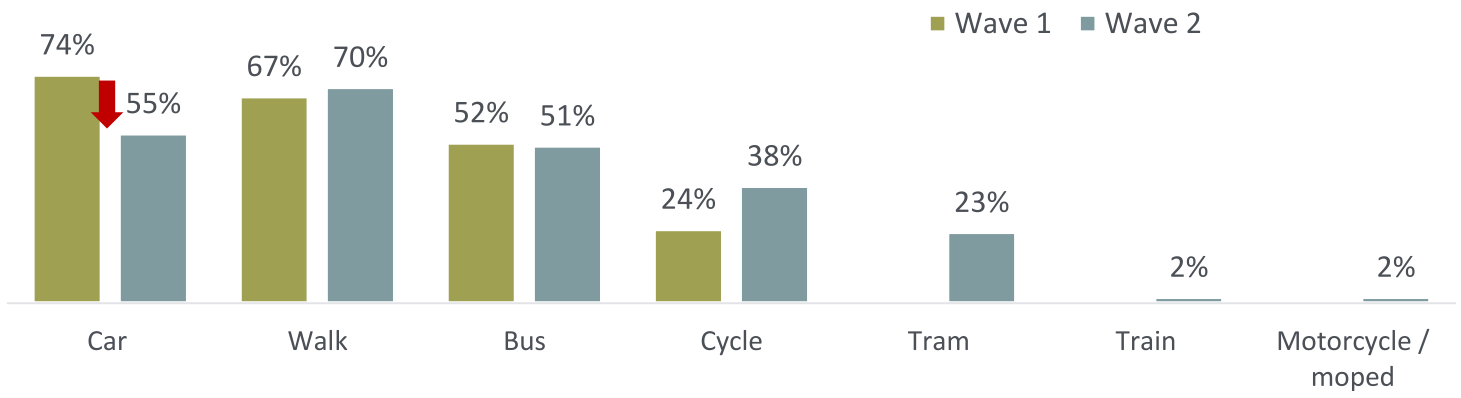
- Respondents were asked to estimate the proportion of their staff who travel to work by each mode of transport.
- The averages overall indicate that, across all businesses in the sample, on an average day around a third walk, three in ten staff travel by car, and a fifth come by bus.
- Overall, seven in ten mentioned at least some staff walking to work, just over half mentioned car and/or bus, two fifths mentioned cycling and just under a quarter mentioned staff travelling by tram.
- These findings were broadly in line with Wave 1 – with the addition of travel by tram, as the tram route was introduced in between the two waves. Travel by car has also decreased at Wave 2.

How staff travel to work

Proportion of employees (on a typical day) travelling by each mode



Total 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): W1 42, W2 47

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 on a typical day.
- The average overall indicates that around half of customers walk to businesses in Leith, with car (15%) and bus (13%) the next most commonly used modes – though the proportion coming by car had dipped this wave.
- Overall, almost nine in ten respondents mentioned at least some customers come on foot – an increase compared to Wave 1. Fewer mentioned at least some of their customers coming by car this wave (around half, compared to around three quarters in Wave 1).

How customers travel to the premises

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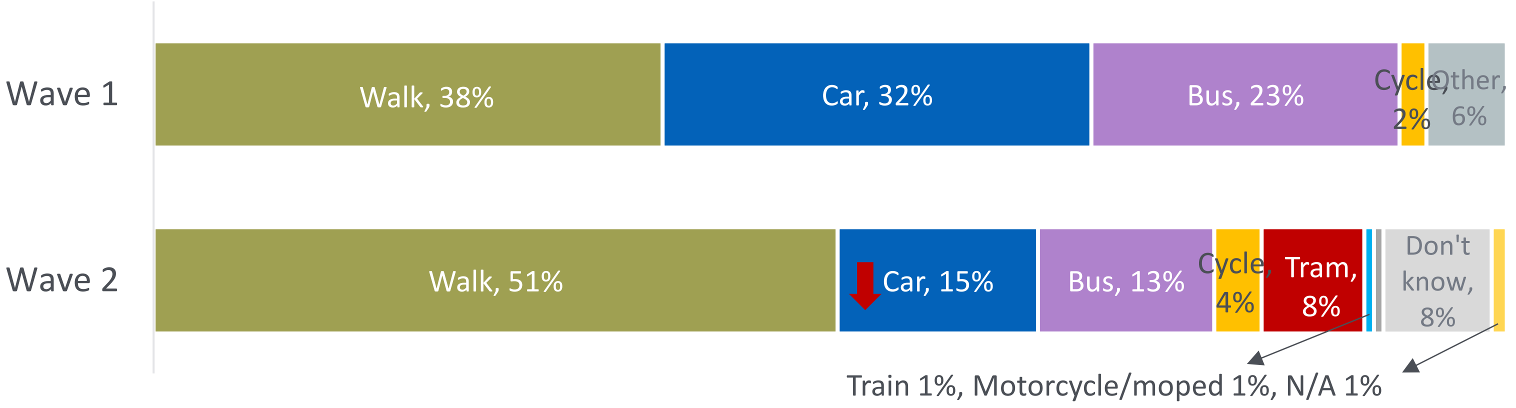
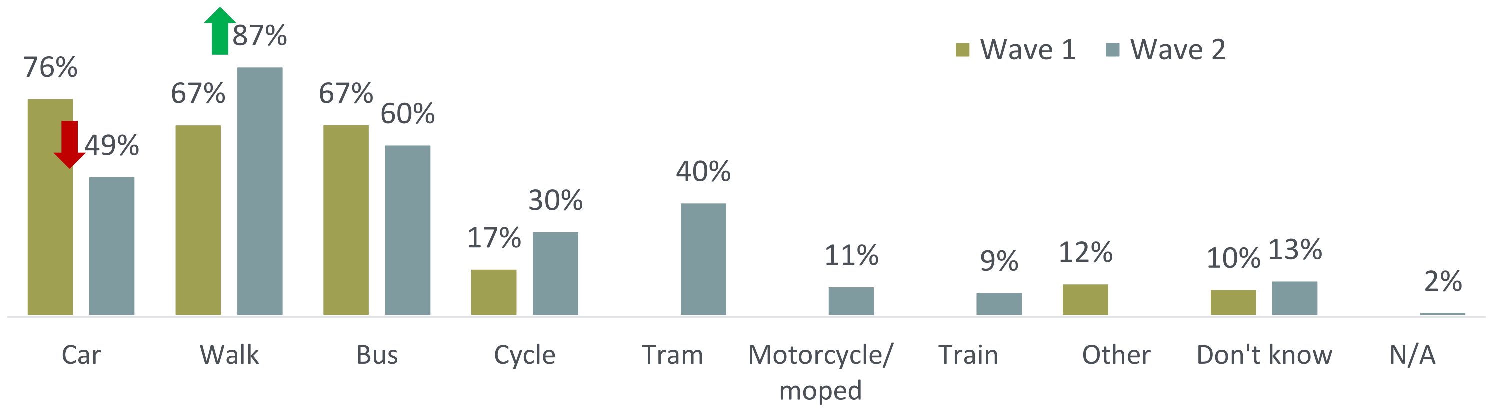
Proportion of customers (on a typical day) travelling by each mode



Total proportion mentioning any customers using each mode



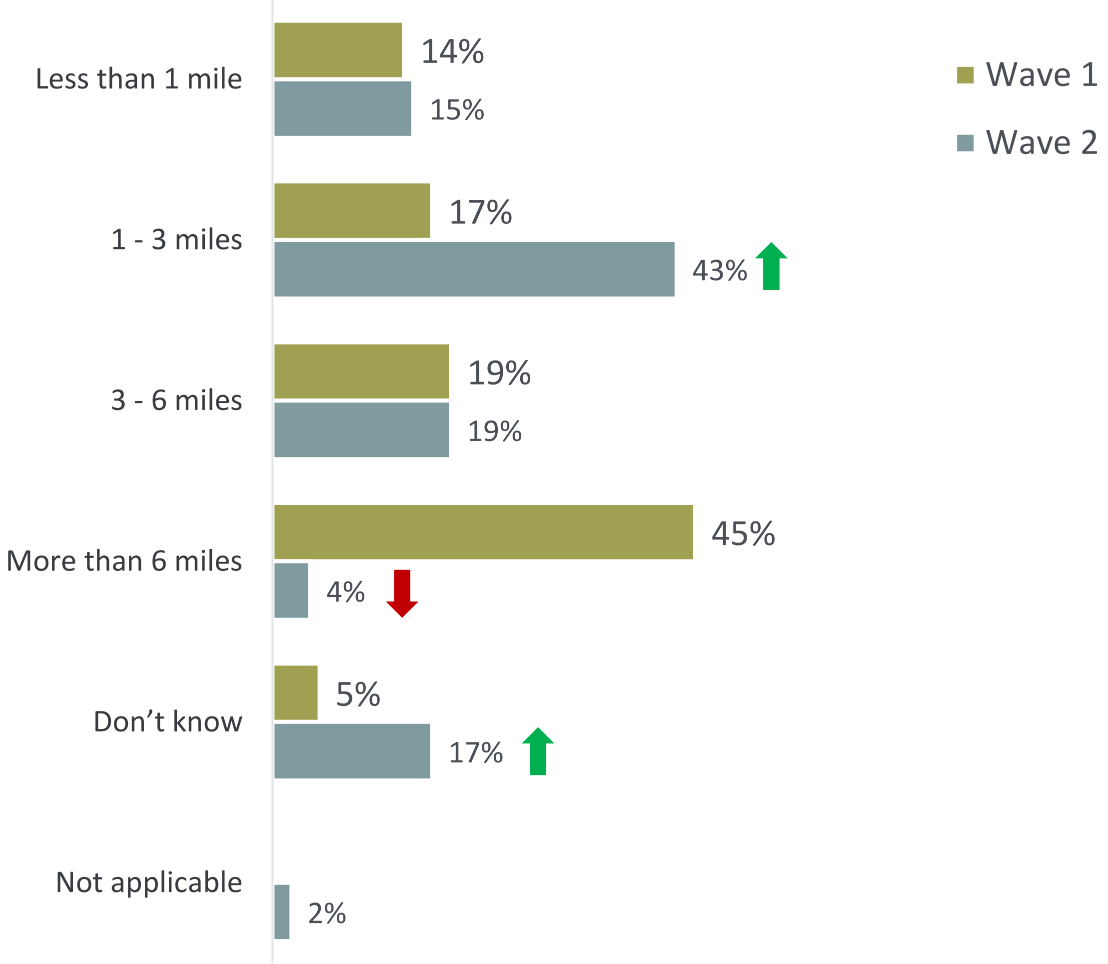
Q5: How do you believe that your customers or business users usually travel to your premises? Please estimate what percentage of your customers travel by each mode on a typical day. Base (all): W1 42, W2 47

Customer travel

Distance

- The most common response when asked how far they estimated most of their customers/users travel to their premises was 1-3 miles (43%).
- A further fifth (19%) said most customers travel 3-6 miles, and 15% said less than a mile.
- There has been a decrease in the proportion saying customers travel more than 6 miles this wave, and an increase in the proportion travelling 1-3 miles, indicating customers are more likely to be fairly local rather than visitors to the area.

How far most customers travel to the premises

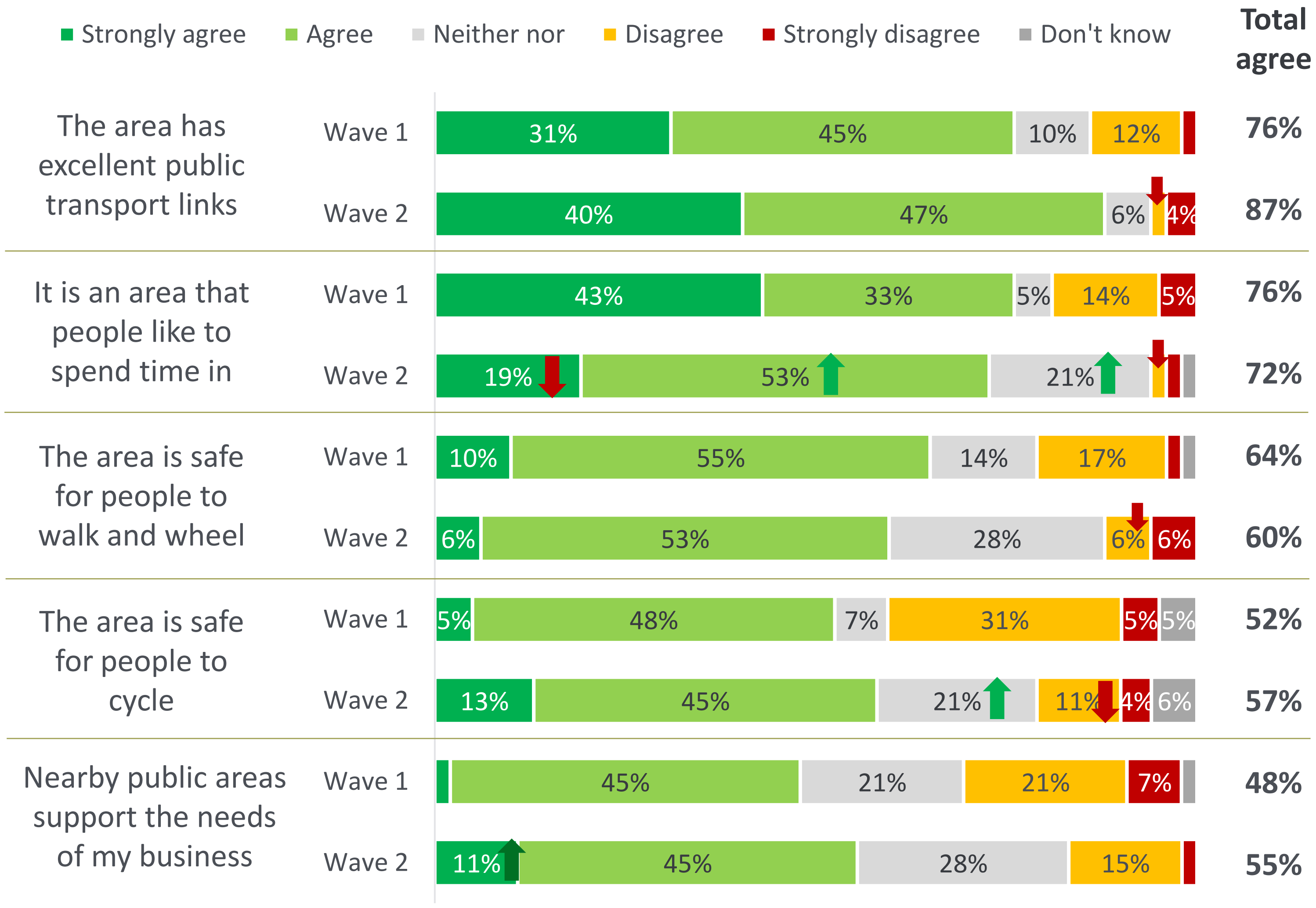


Q6: How far do you estimate most of your customers or business users travel to your premises?
Base (all): W1 42, W2 47

Views of the area

- When asked to rate various aspects of the area around their premises, respondents were most likely to agree that the area has excellent public transport links – 87% agreed overall, with 40% agreeing strongly. In Wave 1, this was not the top rated answer – likely to reflect opening of the tram route since the last wave.
- There were also high levels of agreement overall that people like to spend time in the area (72% agreed; though there was a dip in strong agreement to 19%, and more now said agree or neither/nor).
- Six in ten agreed the area is safe for people to walk and wheel, and almost the same proportion agreed it was safe to cycle in the area (57%) – and fewer said they disagreed this wave.
- Just over half (55%) agreed overall that nearby public areas support the needs of their business – and more now agreed strongly than in Wave 1.
- Despite some changes in strength of agreement noted above, total levels of agreement with all of these statements were in line with Wave 1 results.

Views of the area around your business premises in Leith

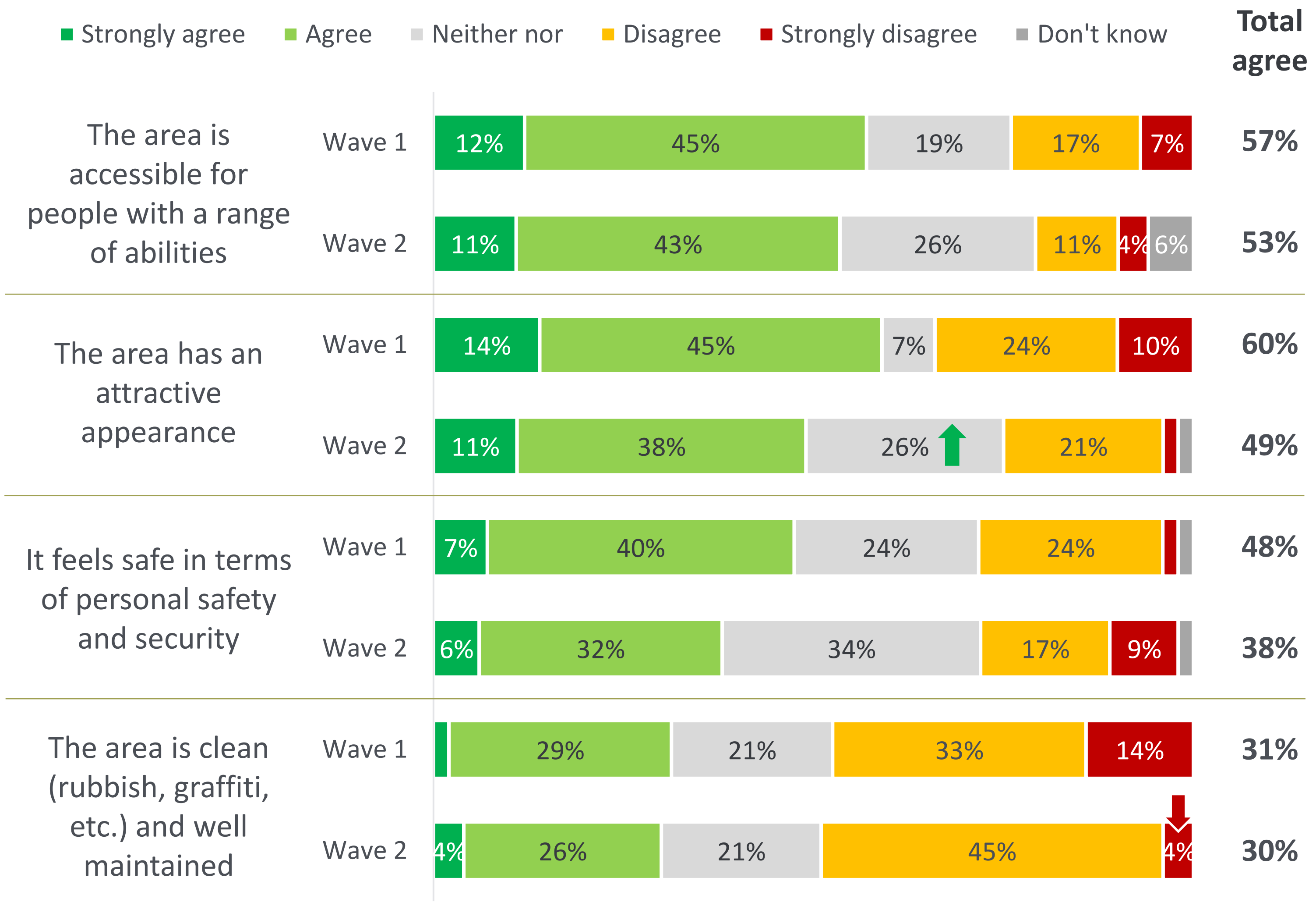


Q7: How much do you agree or disagree with the following statements about the area around your business premises in Leith? Please consider the area shown on this map. Base (all): W1 42, W2 47

Views of the area

- Around half of all respondents agreed overall that the area is accessible for people with a range of abilities, and that the area has an attractive appearance. While total agreement was not significantly lower this wave, there has been an increase in the proportion answering ‘neither/nor’ when asked about the appearance of the area this wave.
- The lowest ratings were given for feeling safe in terms of personal safety and security (38% agreed overall, but 26% disagreed overall), and that the area is clean and well maintained (three in ten agreed, but more respondents disagreed – 49% overall).
- These findings were all broadly in line with Wave 1.

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): W1 42, W2 47

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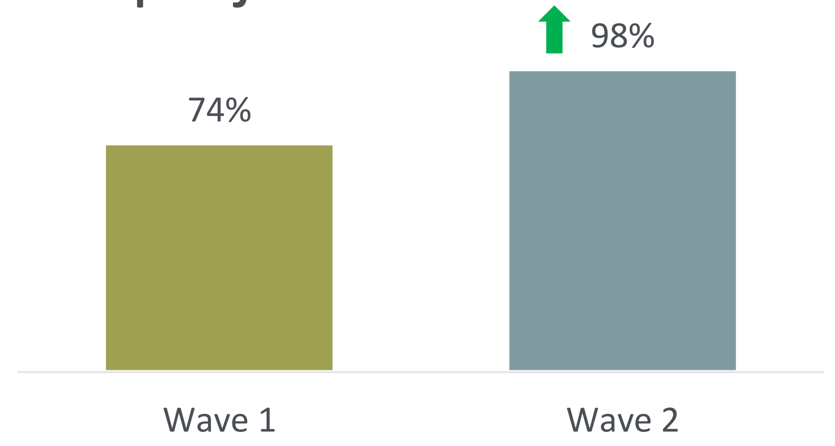
Research findings: awareness and views on the project

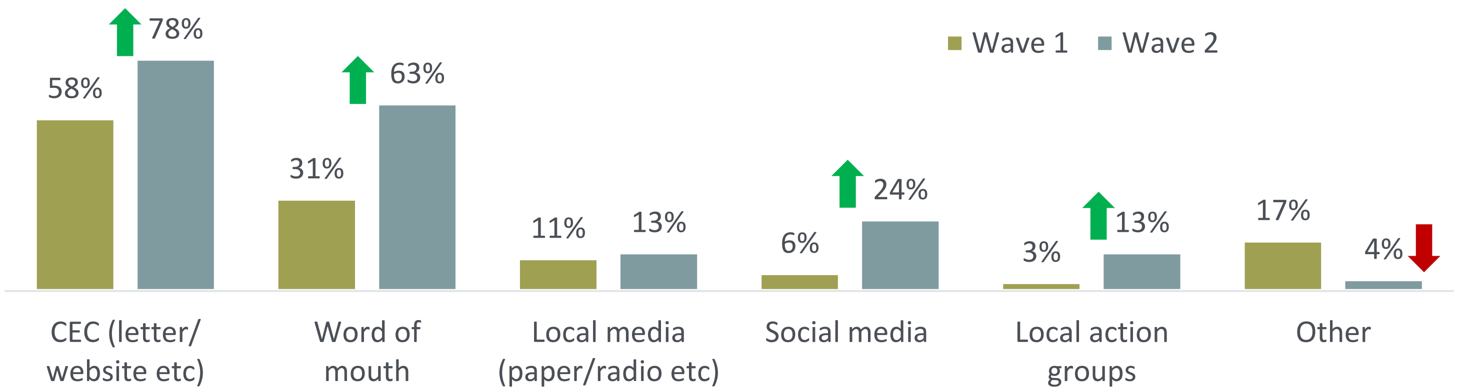
Awareness of proposals

- Respondents were read a description of the Leith Connections project and the LTN measures introduced, and shown maps of the area covered and visual images of the changes. They were then asked a series of questions about these proposals, starting with previous awareness of them.
- The vast majority were aware of the LTN implemented as part of the Leith Connections project (98%) and this has increased from Wave 1 when 74% were aware of these proposed measures.
- Among those who had heard of the measures implemented, the Council was the most common source of information, followed by word of mouth. More people mentioned CEC, word of mouth, social media and local action groups than in Wave 1.

Awareness of LTN as part of Leith Connections project



Source of awareness

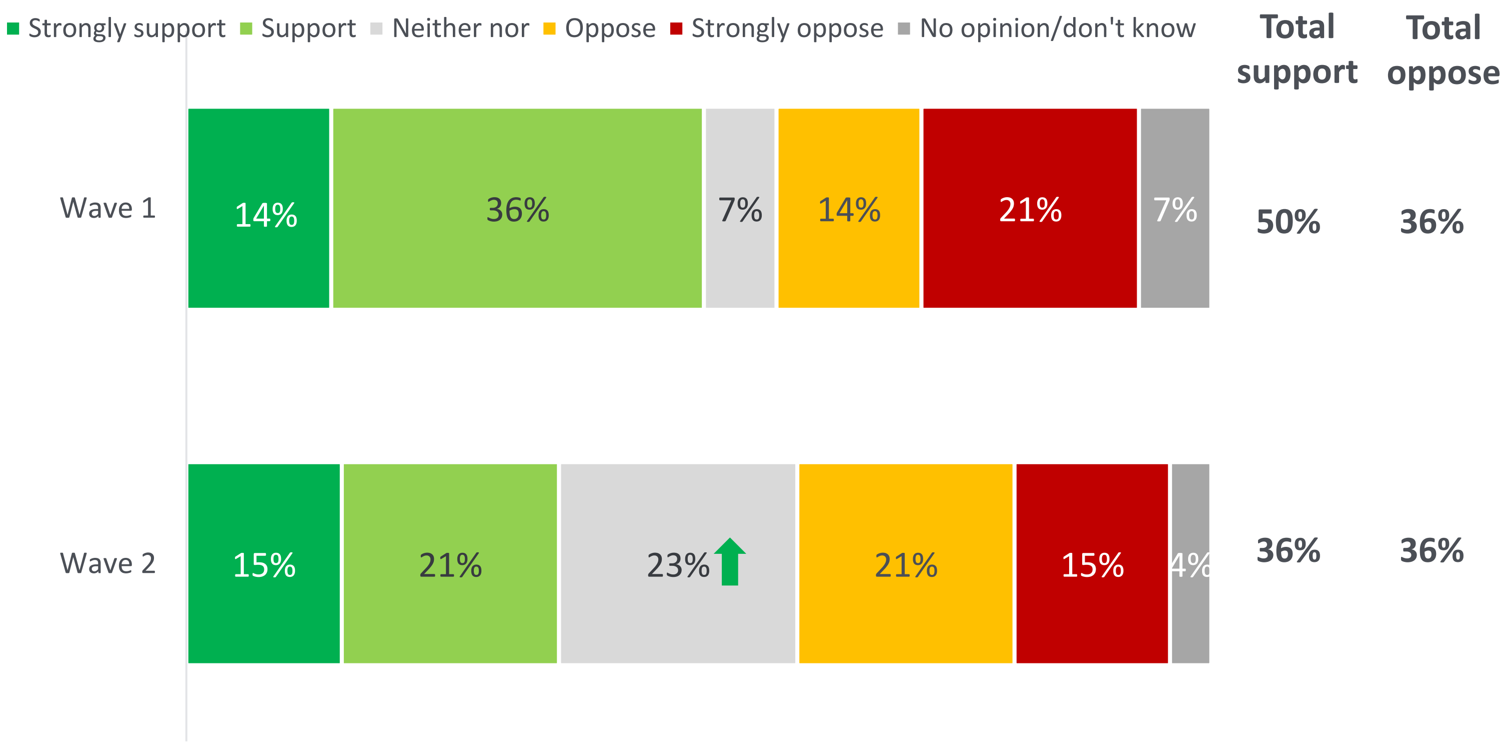


Q8: Before today, were you aware of the measures implemented over the last year/proposals for the low traffic neighbourhood as part of the Leith Connections project? Base (all): W1 42, W2 47
Q9: How did you hear about the Leith Connections project? Base (all aware of project): W1 36, W2 46

Support for the scheme

- Views were mixed in relation to support for the LTN measures implemented to date: in wave 2 36% said they support them and the same proportion said they opposed them. While the proportion who support them is slightly lower than in Wave 1, this difference is not statistically significant. The only change that is significant is that more people in Wave 2 did not feel strongly about the measures (saying ‘neither/nor’).

Support for the measures proposed (W1) and implemented (W2)



Q10: Do you, as a business, support or oppose the measures that will be/have been put in place for the low traffic neighbourhood? Base (all): W1 42, W2 47

LTN
Benefits

- Respondents in Wave 1 were asked to comment on anticipated benefits and challenges for their business of the low traffic neighbourhood plans, and in Wave 2 they were asked what benefits/challenges there have been since the measures were implemented.
- In Wave 2 around half identified any benefits of the LTN measures implemented, similar to the proportion anticipating any benefits in Wave 1.
- Benefits identified in Wave 2 were most likely to be better air quality (32%), followed by better pedestrian crossing facilities (15%), the area looking more attractive (15%), being more accessible by bike (13%) and less congestion/traffic (13%).
- It is also important to note that just less than half of respondents felt that the measures implemented had not brought any benefits to their business.

Benefits of LTN measures

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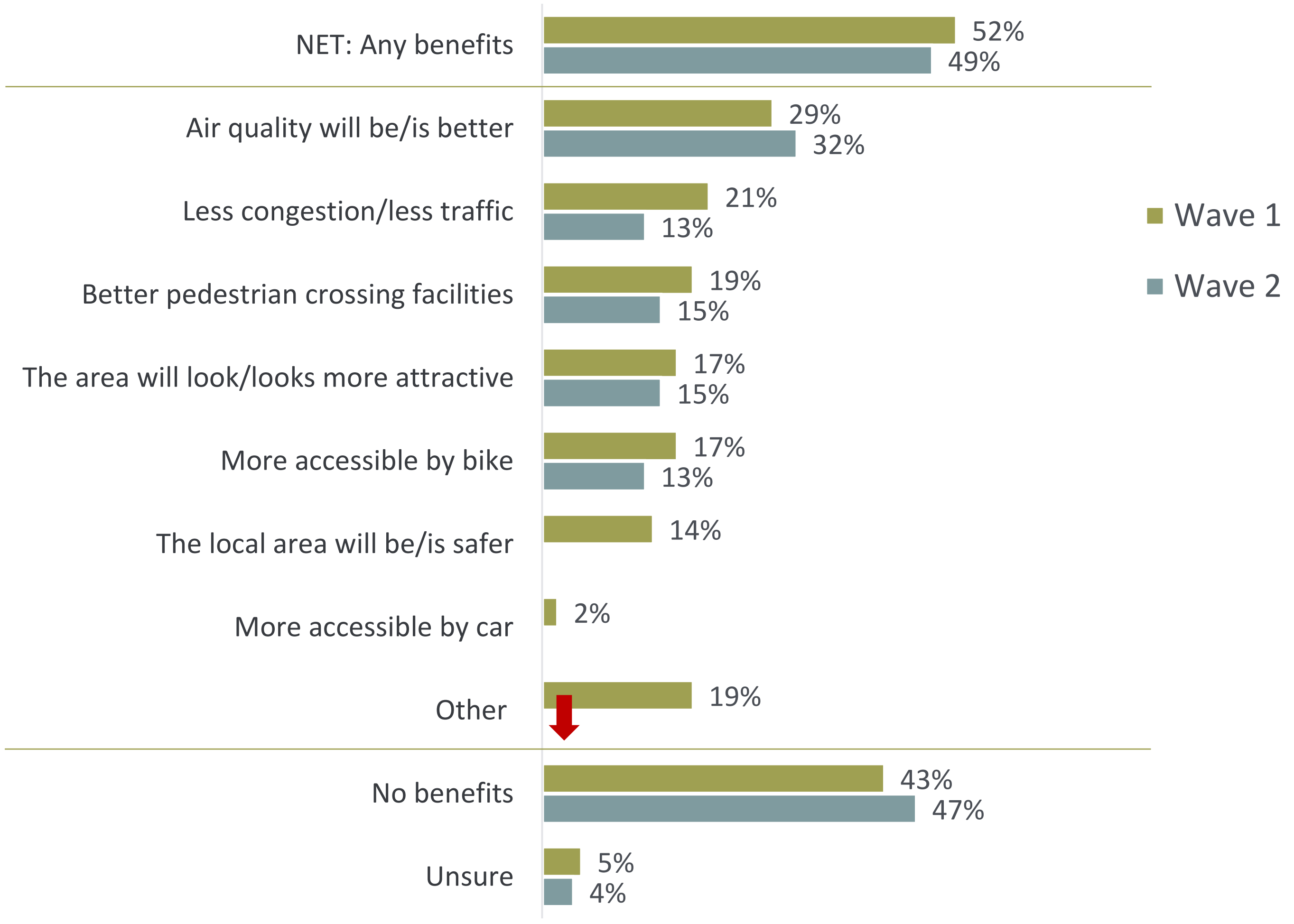


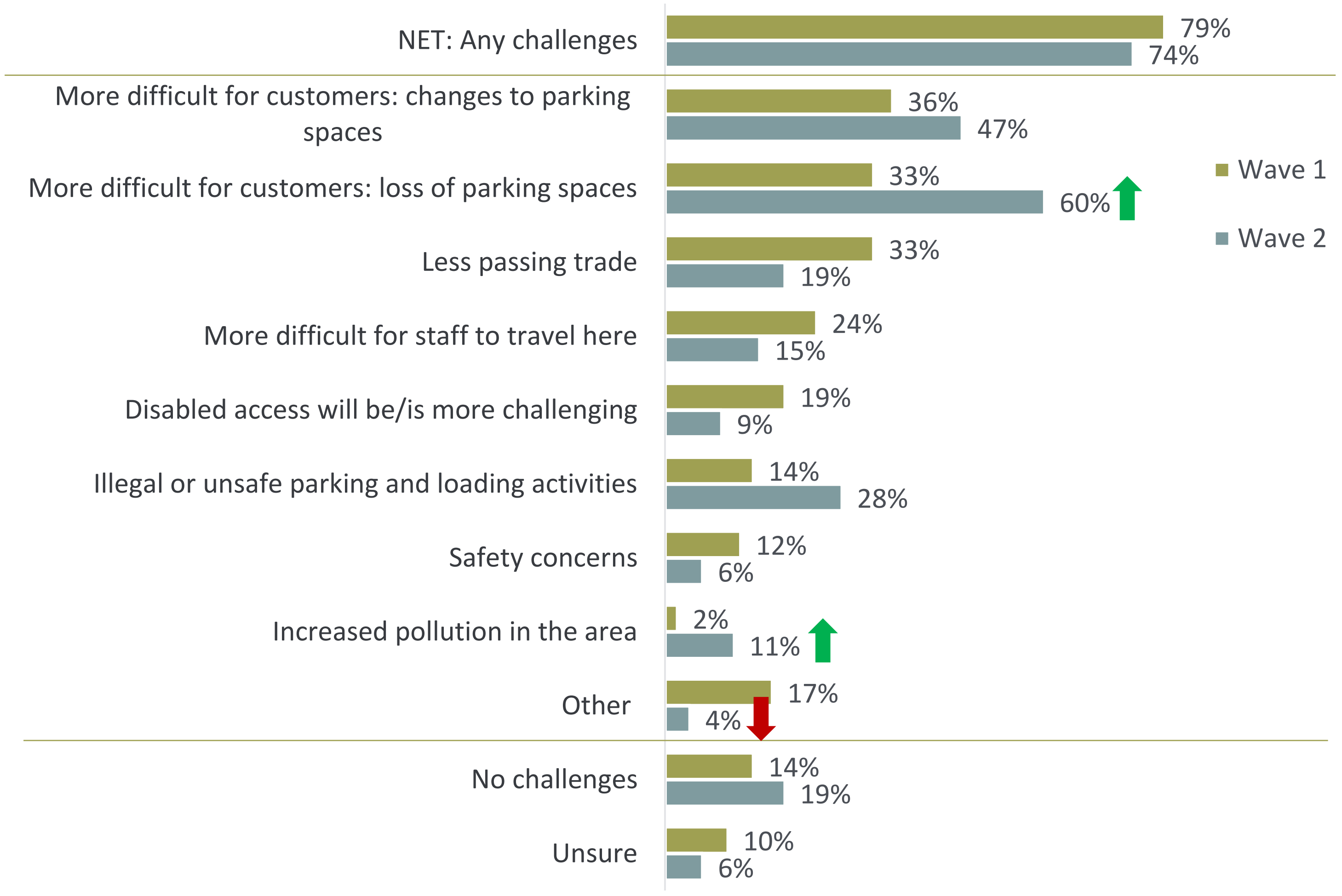
Q11: Do you think there will be/are any benefits to your business from the low traffic neighbourhood plans/measures? Base (all): W1 42, W2 47

LTN

Challenges

- Three quarters (74%) identified a challenge associated with the LTN measures in Wave 2, similar to the 79% who had predicted any challenges in Wave 1.
- The most commonly mentioned issues were difficulties for customers because of a loss of parking spaces (60%; higher than the 33% who predicted this in Wave 1), difficulty for customers because of changes to parking spaces (47%), and illegal/unsafe parking and loading activities (28%). More now also mentioned increased pollution (11%) compared to the 2% who predicted this impact in Wave 1.

Challenges of LTN measures



Q12: Do you think there will be/are any challenges to your business from the low traffic neighbourhood plans/measures? Base (all): W1 42, W2 47

LTN

Impact on footfall

- In Wave 1, around half anticipated that the LTN plans would have an impact on footfall to their premises; whilst in Wave 2, fewer (32%) reported that their footfall had been affected.
- Among those who reported a change in footfall in Wave 2, more said it had decreased (80%) than said it had increased (20%), with the largest proportion saying footfall had decreased slightly (53%).
- The proportion saying they had experienced a decrease in footfall in Wave 2 was a higher than the proportion that anticipated a decrease in footfall in Wave 1.
- Please note the very small base size for this question.

Impact of LTN on footfall

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	W1	W2
Think footfall will be/has been affected	**52%**	⬇ **32%**
Among those….		
Increase(d) significantly	9%	-
Increase(d) slightly	36%	20%
Decrease(d) slightly	5%	⬆ 53%
Decrease(d) significantly	41%	27%
Unsure	9%	-
NET: Increase(d)	***45%***	***20%***
NET: Decrease(d)	***45%***	⬆ ***80%***

Q14: Do you think the measures (being) introduced for the low traffic neighbourhood will have/have had any impact on footfall into your premises (once it is complete)? Base (all): W1 42, W2 47. Q15. How do you think footfall into your premises will be/has been affected? Base (all answering yes at Q14): W1 22, W2 15

Other comments – examples of feedback received

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Anything to improve cycling and walking is good i.e. more cycle lanes.

If you were going to block any streets off it would better to block the streets off near parks where children play, not the roads people use to drive at, ambulances and fire trucks get stuck there, it's a nightmare for my customers and it is more dangerous now. Plus the crime rates have risen.

The changes are good and keep that as a priority, cycling, easy access for people on wheels etc.

As a resident the roads are more pleasant to walk around and I support environmentally friendly measures, but as a business it is making moving around here harder. The trams have made it harder for cyclists to cycle safely.

It's great – I hope similar measures have been and will be implemented further locally and across the city.

Parking is a disgrace. It's hard to get deliveries with certain roads closed at times of the day.

Massive room for improvement, get someone who has style to redesign the streets and make them less boring.

You don't consider the local businesses or residents on how they can access this area. You have to take massive detours now - you consume more time, use more petrol (pollution), it's harder for taxis as well. Even the residents complain about that, 20 minutes of travel turned into 45 minutes now and there is more traffic now on Great Junction and Duke St.

Summary and conclusions

Summary and conclusions

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- The purpose of this study was to provide an interim measure of views, opinions and experiences of businesses in the Leith Connections area, after the implementation of the LTN measures.

Travel in the area

- There are some indications that people visiting businesses within the area may be starting to use more active travel options (more walking, and fewer are using the car). This may reflect slight changes in the profile of customers in terms of how locally they are travelling, with more businesses now saying customers tend to travel 1-3 miles whereas in Wave 1 more were travelling 6+ miles.

Views of the area

- When asked to rate various aspects of the area around their premises, respondents were most likely to agree that there are excellent public transport links, people like to spend time in the area, that the area is safe for people to walk and wheel, and safe to cycle in.
- Agreement was lower in relation to the area being attractive, feeling safe in terms of personal safety and security, and the lowest rating overall was given in relation to the area being clean and well maintained.
- Despite some changes in strength of agreement, most of these ratings were in line with Wave 1 results – although public transport was now the most highly rated aspect of the area, rather than second highest last wave, likely reflecting the opening of the tram route to Leith.

Awareness and views of the Leith Connections project

- The vast majority were aware of the project, and the Council was the most common source of information about these measures, followed by word of mouth.
- Views were split in terms of support for the LTN measures – around a third supported them and the same proportion opposed them. In Wave 2, people were less likely not to express a strong opinion either way, with just under a quarter saying ‘neither/nor’.
- Around half of respondents identified any benefit of the LTN measures, with better air quality, better pedestrian crossing facilities and the area looking more attractive being most commonly mentioned.
- However, three quarters identified challenges associated with the measures – these were most likely to be related to difficulties for customers because of loss of or changes to parking spaces, and illegal or unsafe parking and loading activities.

- A final wave of research will provide updated data on business perspectives of the Leith Connections project when it has been in place another six months.

Key contacts

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Technical appendix

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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 (wave 1) and 47 (wave 2).

Wave 1 fieldwork was completed between 14th February and 10th March 2023. In total, 4 interviewers worked on data collection.

Wave 2 fieldwork was completed between 20th April and 4th May 2024. In total, 3 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.

Margins of error for these sample sizes are detailed in the main body of this report. These are 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.