City of Edinburgh Council

Leith Connections: Business Survey – Wave 3

December 2024

Contents

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.

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.

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 third wave of the business survey, conducted in November 2024. The data is compared to the baseline survey, conducted in February 2023 prior to the introduction of the LTN, and the second wave of research conducted in April 2024.

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.
- 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%
Wave 3	47	0	47	Between +/-2.08 and +/-10.46%

- Fieldwork dates:
  - Wave 1 - 14th February to 10th March 2023
  - Wave 2 - 20th April to 4th May 2024
  - Wave 3 - 31st October to 14th November 2024.

Data analysis and reporting notes

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- 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.
- **Significance testing on charts focuses on differences between Wave 3 and Wave 1 (the baseline measure). Green and red arrows indicate significant increases/decreases in Wave 3 compared to Wave 1.** Wave 2 changes are noted in the commentary where relevant but not shown visually for ease of reading the charts.
- Where figures do not add to 100% this is due to multi-coded responses or rounding.
- For ease of reading, figures of 1% or 2% are not shown on some charts.

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Travel to the premises

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 findings indicate that, across all businesses in the sample, on an average day around three in ten staff walk to work and a quarter of staff each travel by car and by bus. The average travelling by car to work has decreased from Wave 1 to Wave 3.
- Combining the data we are also able to show the total percentage of businesses who reported that at least some of their staff use each mode of transport. The most commonly mentioned were walking (68%) and bus (60%), followed by tram (55%) and car (51%). Three in ten businesses reported that some of their staff cycle to work.
- Comparing findings with previous waves shows that the decrease in travelling by car from Wave 1 (74%) to 2 (55%) was sustained in Wave 3 (51%).
- A higher proportion of respondents in Wave 3 travelled by tram compared with Wave 2. Travel by this method was not asked in Wave 1 because the tram line was introduced after Wave 1.
- Compared to Wave 1 there were also increases in travel by motorcycle/moped (9%) and train (6%) in Wave 3.

How staff travel to work

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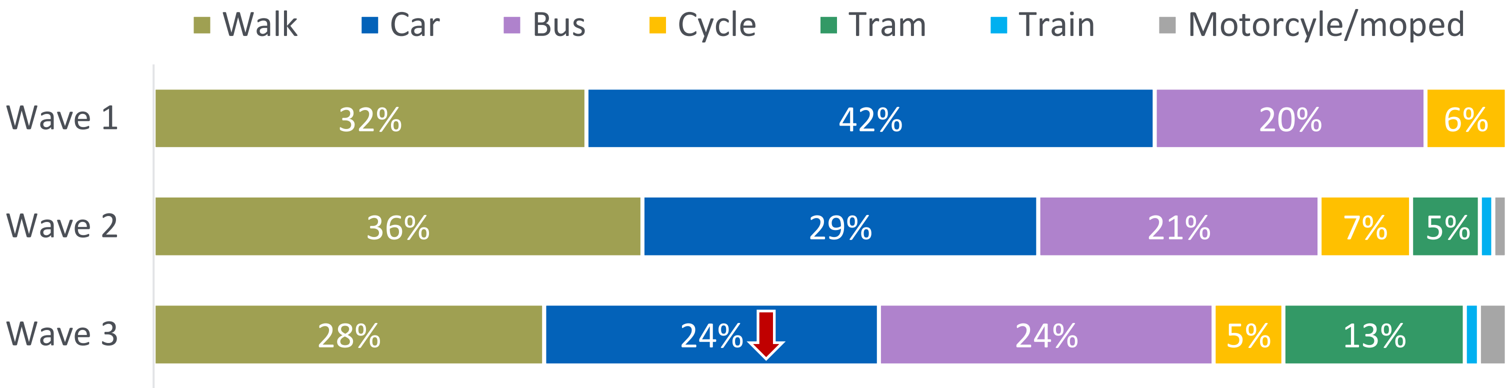
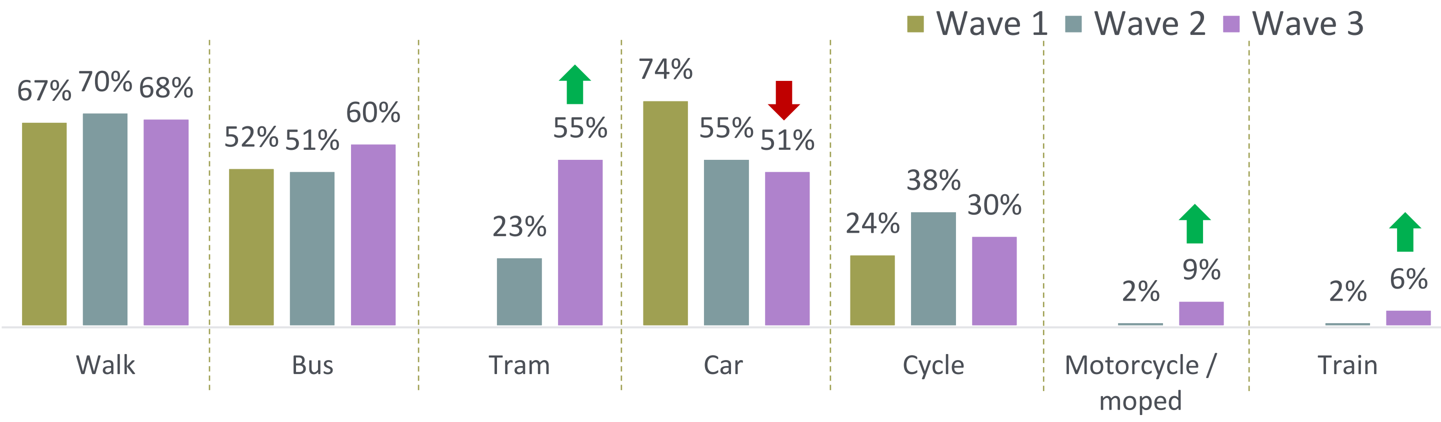
Proportion of employees (on a typical day) travelling by each mode



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, W3 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 just over four in ten customers walk to businesses in Leith, with car (16%) and bus (12%) the next most commonly used modes. These findings were similar to Wave 2, but show a decrease in customers travelling by car compared to Wave 1 (32%).
- Similar to staff, the largest proportions of businesses reported that at least some customers walk (83%) and/or travel by bus (66%). The proportions of businesses reporting customers walking in Waves 2 and 3 was higher than in the Wave 1 baseline.
- Since the introduction of Leith Connections measures around half of businesses have reported customers travelling by car, which is lower than before the measures were in place in Wave 1 (76%).
- Significantly, this wave there has also been an increase in businesses reporting customers cycling compared to Wave 1, with over a third saying at least some customers travel in this way.
- Wave 3 also saw increases in the proportion of businesses reporting customers travelling by train (26%) and motorcycle/moped (17%), compared to Wave 1 (none for both).

How customers travel to the premises

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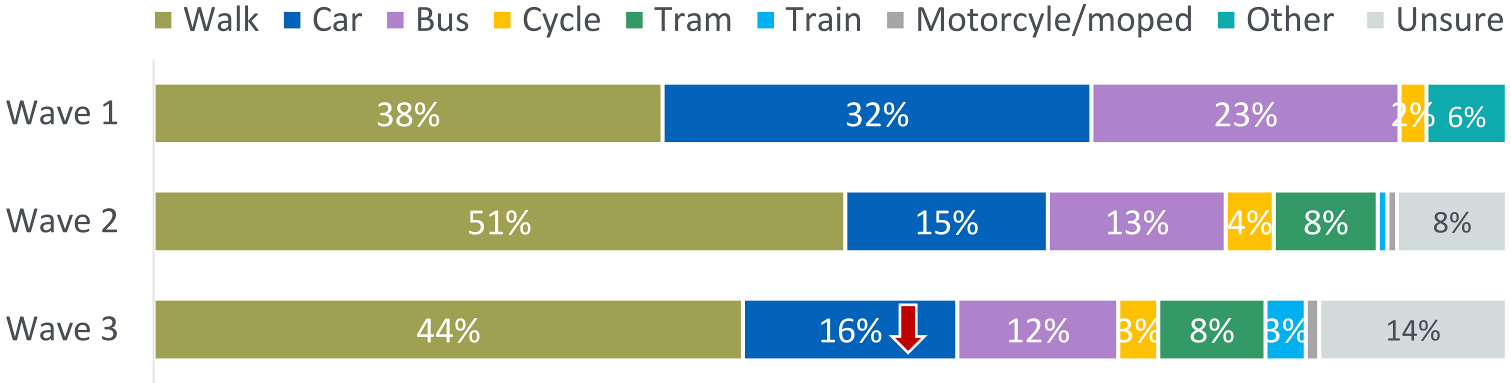
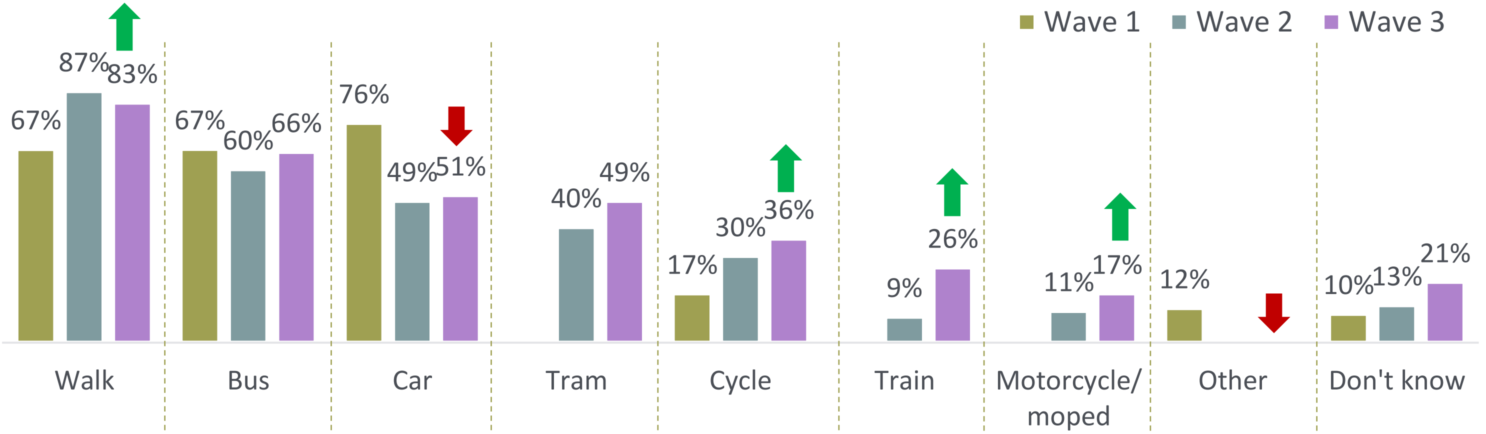
Proportion of customers (on a typical day) travelling by each mode



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, W3 47

Customer travel

Distance

- The largest proportion of businesses (58%) reported that their customers/users were fairly local, with 13% saying most come from a radius of less than a mile and 45% reporting most come from within a 1 to 3 mile radius.
- Looking at changes over the three waves of research, differences noted between Waves 1 and 2 have been sustained in Wave 3. Most notably, fewer businesses said customers travel more than 6 miles (45% in Wave 1 compared to 15% in Wave 3), and more stated most customers come from 1 to 3 miles away (17% in Wave 1 to 45% in Wave 3).

How far most customers travel to the premises

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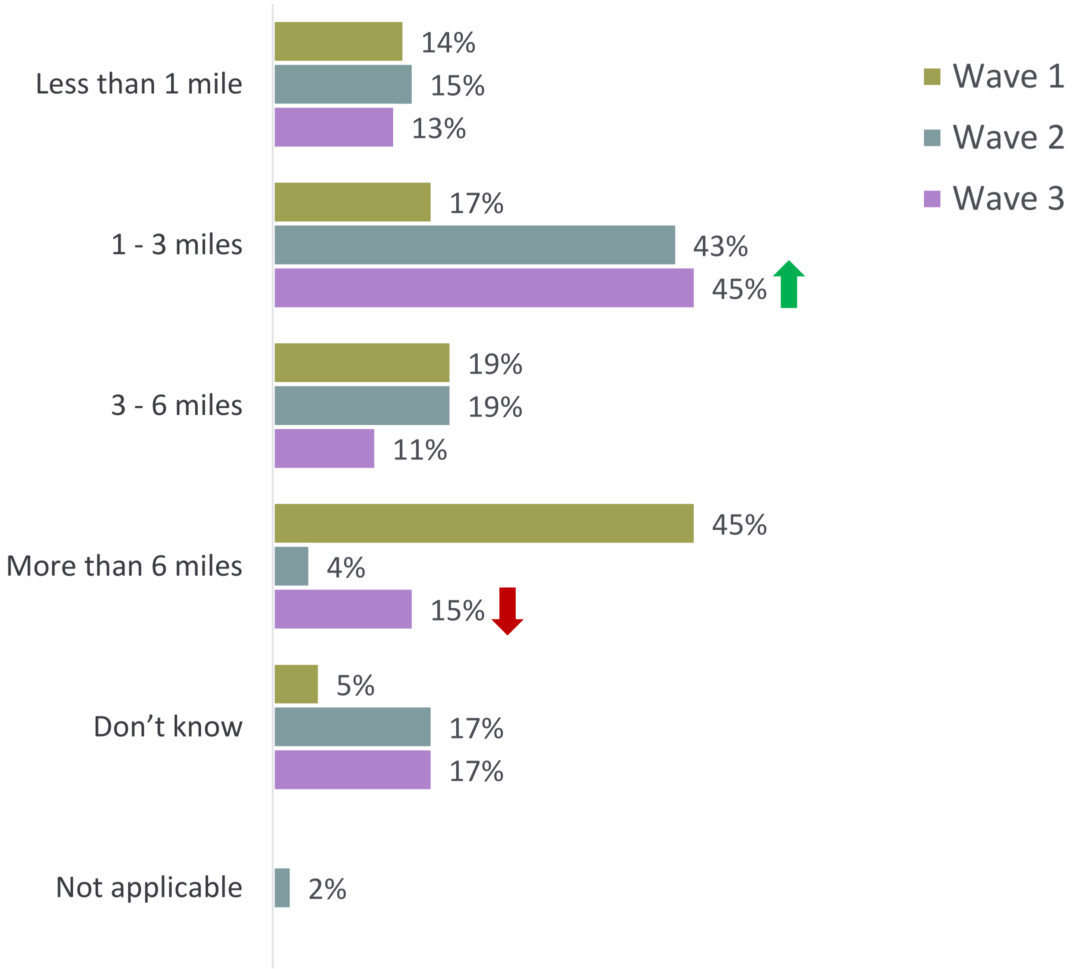


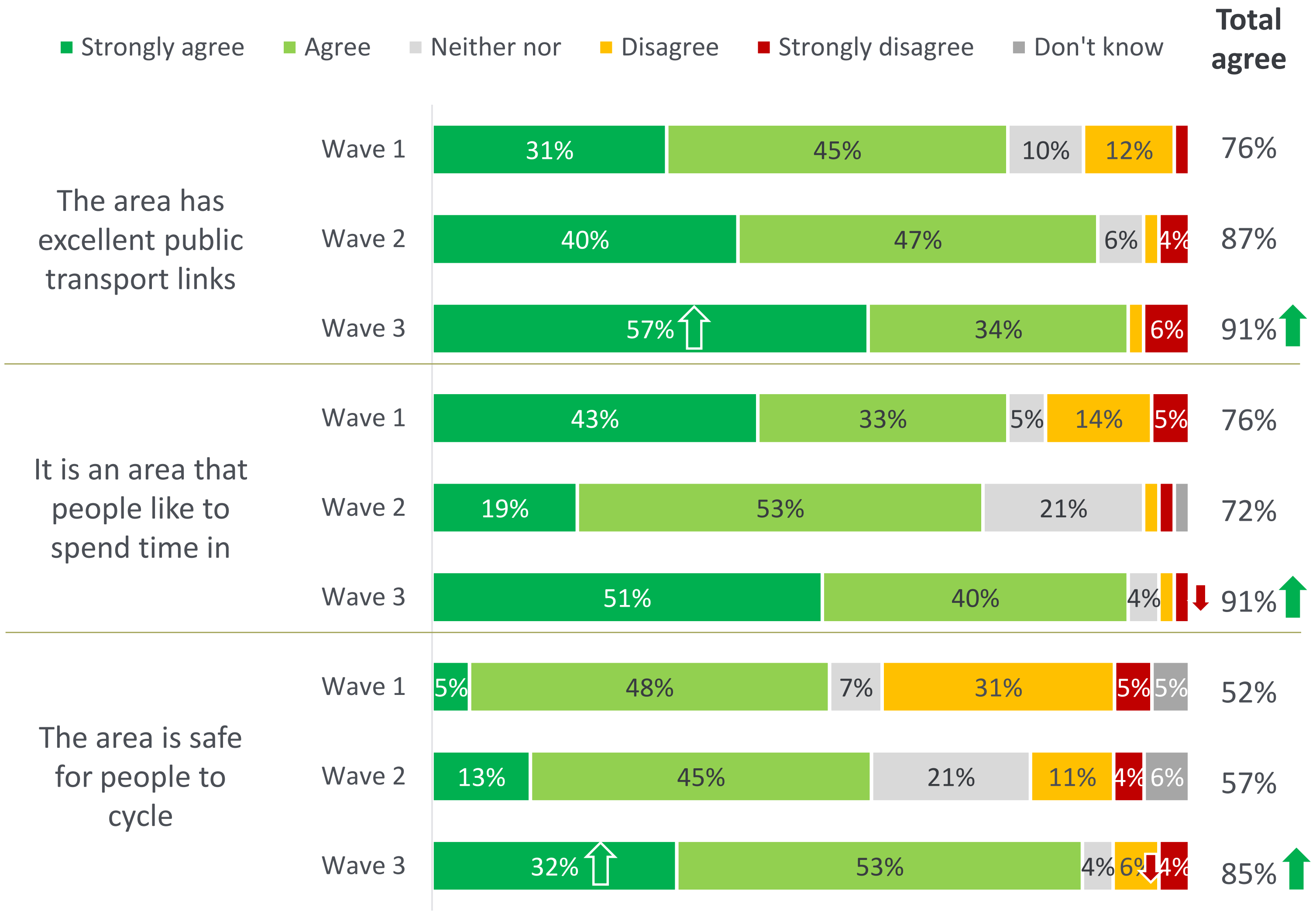
Q6: How far do you estimate most of your customers or business users travel to your premises?
Base (all): W1 42, W2 47, W3 47

Perceptions of the Leith area

Perceptions of Leith

- Respondents were asked to rate various aspects of the area around their business premises in Leith by agreeing or disagreeing with a number of statements. The findings from this question are shown over the following three charts, ordered from most to least positive.
- Respondents were most positive about public transport in Leith, with 91% agreeing overall, and 57% agreeing strongly that it has excellent public transport links. Strong agreement has increased significantly since Wave 1 when 31% strongly agreed.
- There were also very high levels of agreement that people like to spend time in the area (91% agreed overall, with 51% agreeing strongly).
- Almost nine in ten (85%) agreed that Leith is safe for people to cycle, with 32% specifically agreeing strongly about this – more than the proportions that felt this way in Waves 1 and 2 – and fewer disagreed.

Views of the area around your business premises in Leith

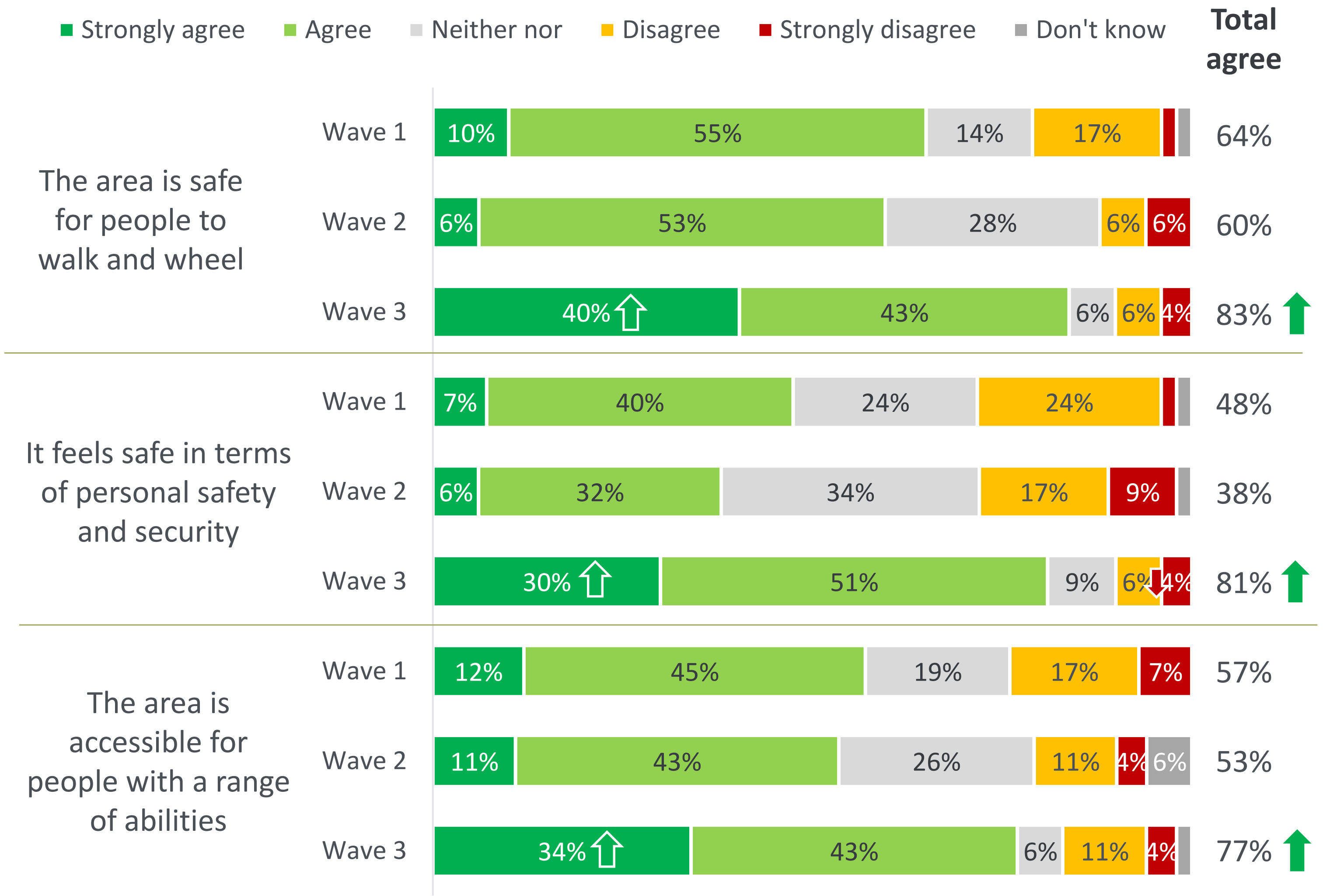


Q7: How much do you agree or disagree with the following statements about the area around your business premises in Leith? Please consider the area shown on this map. Base (all): W1 42, W2 47, W3 47

Perceptions of Leith

- The majority of respondents also felt that Leith is a safe place, which is accessible for people with disabilities, although the strength of agreement tended to be weaker with fewer strongly agreeing compared to statements about public transport and Leith being a place people like to spend time in.
- More than eight out of ten (83%) agreed the area is safe for people to walk and wheel, with 40% agreeing strongly – a significant increase on those who felt this way in Wave 1.
- Agreement around feeling safe in terms of personal safety and security also improved greatly over the past two waves, and now sits at 81% overall agreement, compared to just 48% agreement in Wave 1 and 38% in Wave 2.
- More than three quarters (77%) of all respondents agreed overall that the area is accessible for people with a range of abilities – another increase in agreement compared with previous waves.

Views of the area around your business premises in Leith

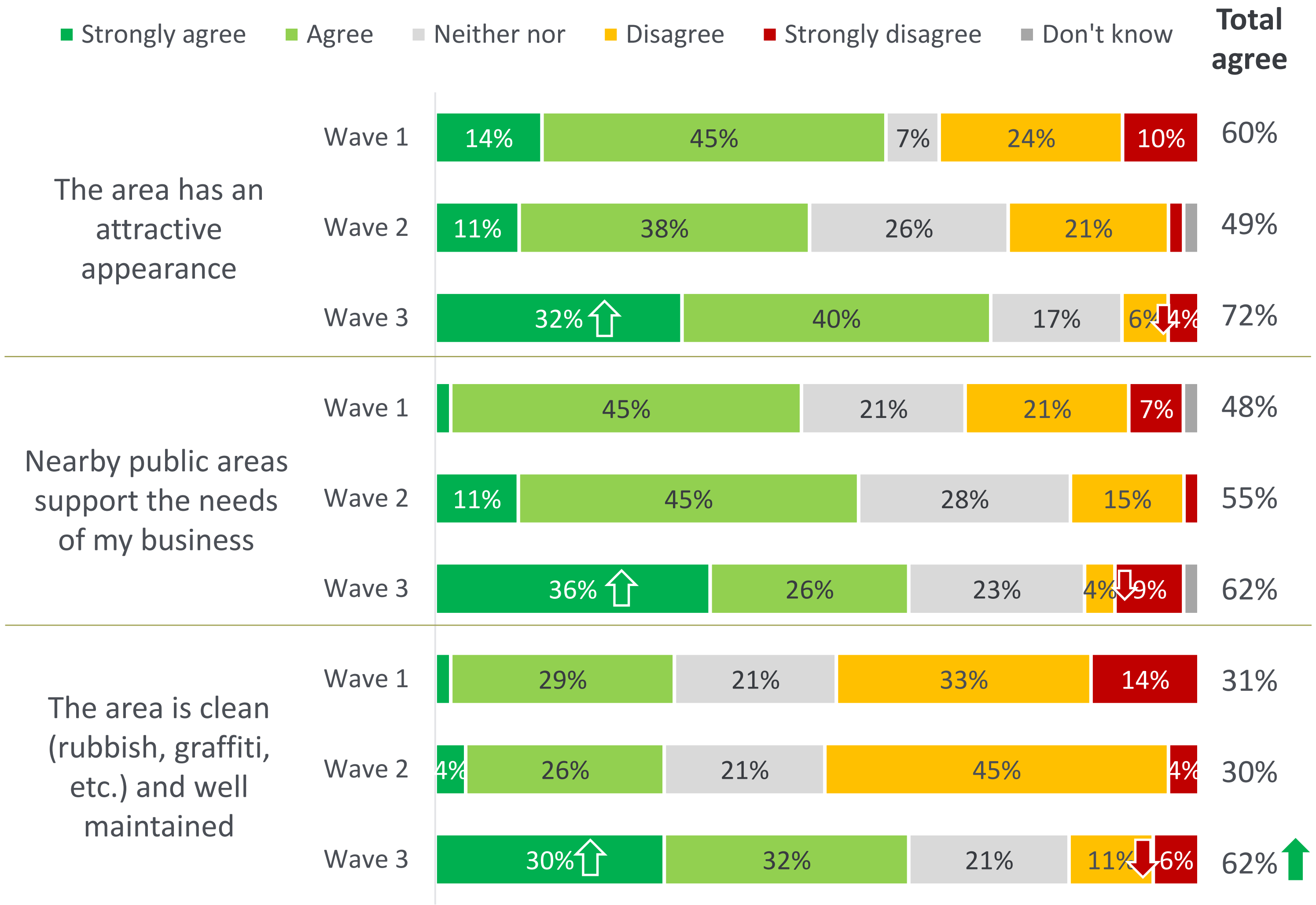


Q7: How much do you agree or disagree with the following statements about the area around your business premises in Leith? Please consider the area shown on this map. Base (all): W1 42, W2 47, W3 47

Perceptions of Leith

- The areas around the businesses interviewed in Leith were also praised for their appearance, with some increases in strong agreement noted over the waves of research. However, of all the aspects of Leith respondents were asked about, these statements about local public areas attracted the lowest levels of agreement.
- Nearly three quarters (72%) agreed overall that the area has an attractive appearance, with 32% agreeing strongly. While total agreement was not significantly higher compared to Wave 1, there has been an increase compared to Wave 2 when only 49% agreed. There has also been an increase in strong agreement in Wave 3 compared to Wave 1.
- Furthermore, just over three fifths (62%) agreed overall that the area is clean and well maintained. Both overall agreement and strong agreement were significantly higher in Wave 3 compared to Waves 1 and 2.
- The same proportion of businesses (62%) agreed overall that nearby public areas support the needs of their business. A higher proportion agreed strongly with this sentiment in Wave 3 (36%) than in Wave 1 (2%) and a lower proportion disagreed (28% in Wave 1 and 13% in Wave 3).

Views of the area around your business premises in Leith



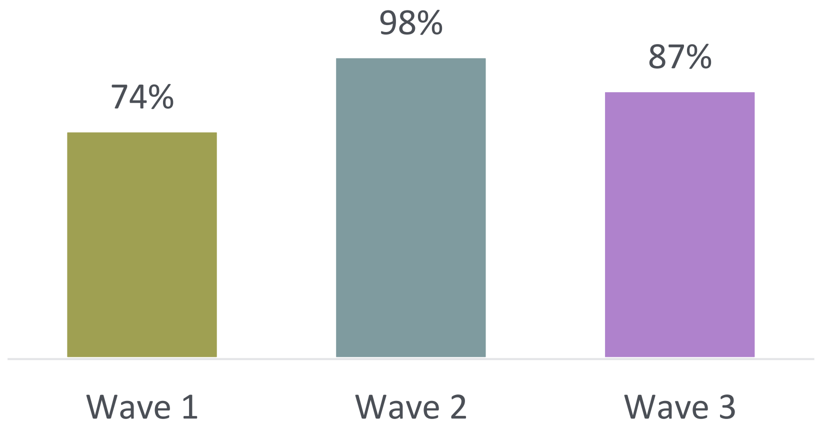
Q7: How much do you agree or disagree with the following statements about the area around your business premises in Leith? Please consider the area shown on this map. Base (all): W1 42, W2 47, W3 47

Awareness and views on the Leith Connections project

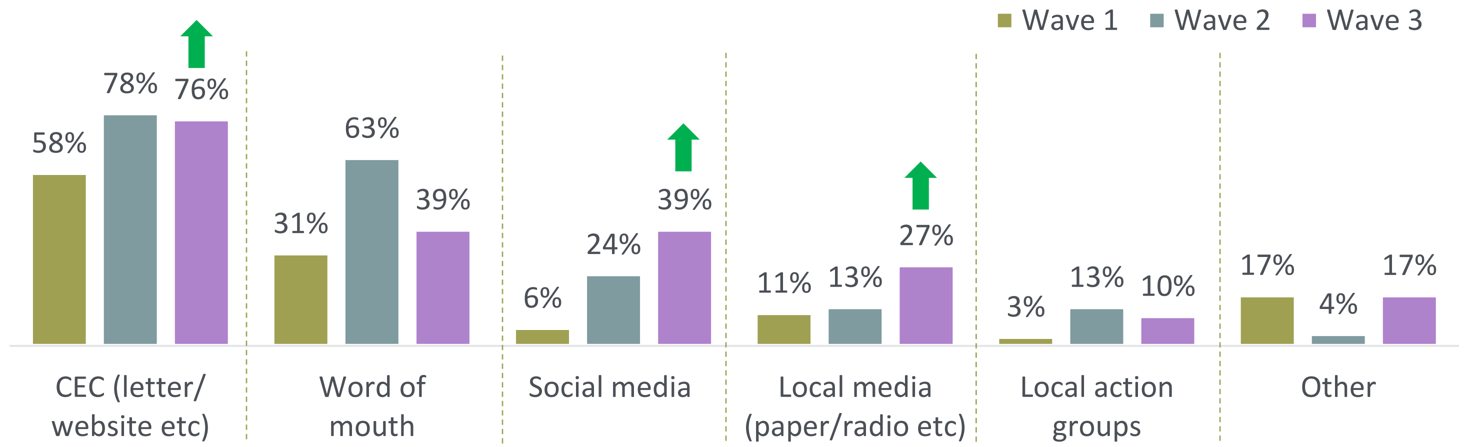
Awareness of LTN measures

- Respondents were read a description of the Leith Connections project and the LTN measures introduced, and also shown maps of the area and visual images of the changes. They were then asked a series of questions about these, starting with awareness of the measures implemented.
- Almost nine in ten respondents (87%) were aware of the LTN measures implemented as part of the Leith Connections project. The proportion who were aware had increased from Wave 1 to Wave 2 and is not significantly different now in Wave 3.
- Among those aware of the measures, the Council continues to be the most common source of information (76%), followed by word of mouth (39%) and social media (39%). This wave, more than a quarter mentioned local media.
- Awareness via official Council communications, as well as from social media and local media have all increased in Wave 3 compared to Wave 1. However, fewer business respondents mentioned word of mouth this wave compared to last wave.

Awareness of LTN as part of Leith Connections project



Source of awareness



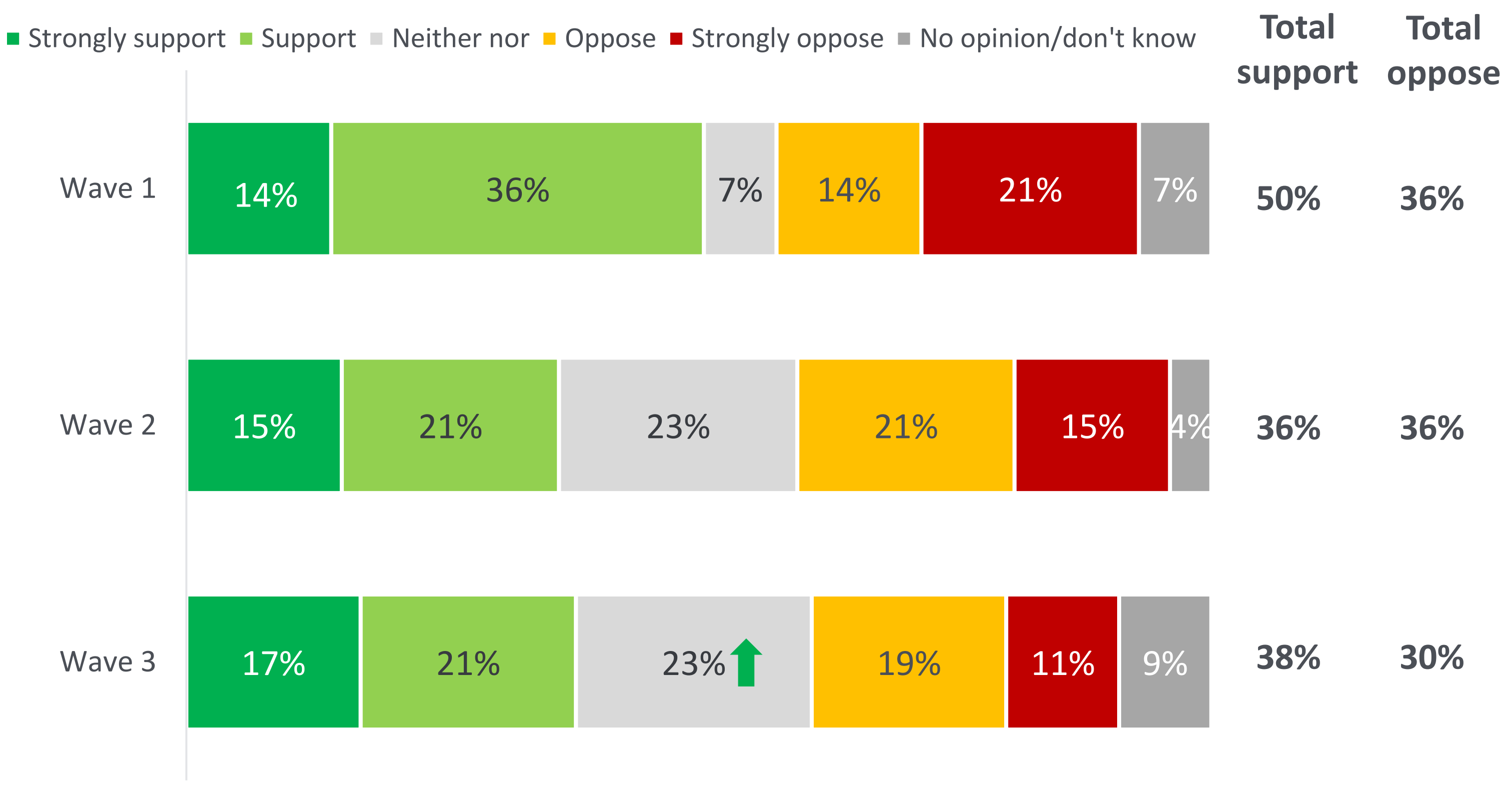
Q8: Before today, were you aware of the measures implemented over the last year/proposals for the low traffic neighbourhood as part of the Leith Connections project? Base (all): W1 42, W2 47, W3 47

Q9: How did you hear about the Leith Connections project? Base (all aware of project): W1 36, W2 46, W3 41

Support for the scheme

- Respondents were asked whether, as a business, they supported or opposed the measures that have been put in place for the low traffic neighbourhood.
- Despite notable improvements in perceptions of the local area in Leith over the three waves of research, views were divided on whether respondents supported or opposed the measures. In Wave 3, similar proportions were supportive (38%) and opposed (30%) with almost a quarter responding 'neither support nor oppose'.
- These levels of support and opposition were not significantly different from either Wave 1 or Wave 2, although in Wave 3 more people did not feel strongly about the measures compared to Wave 1 (saying 'neither nor').

Support for the measures proposed (W1) and implemented (W2 & W3)

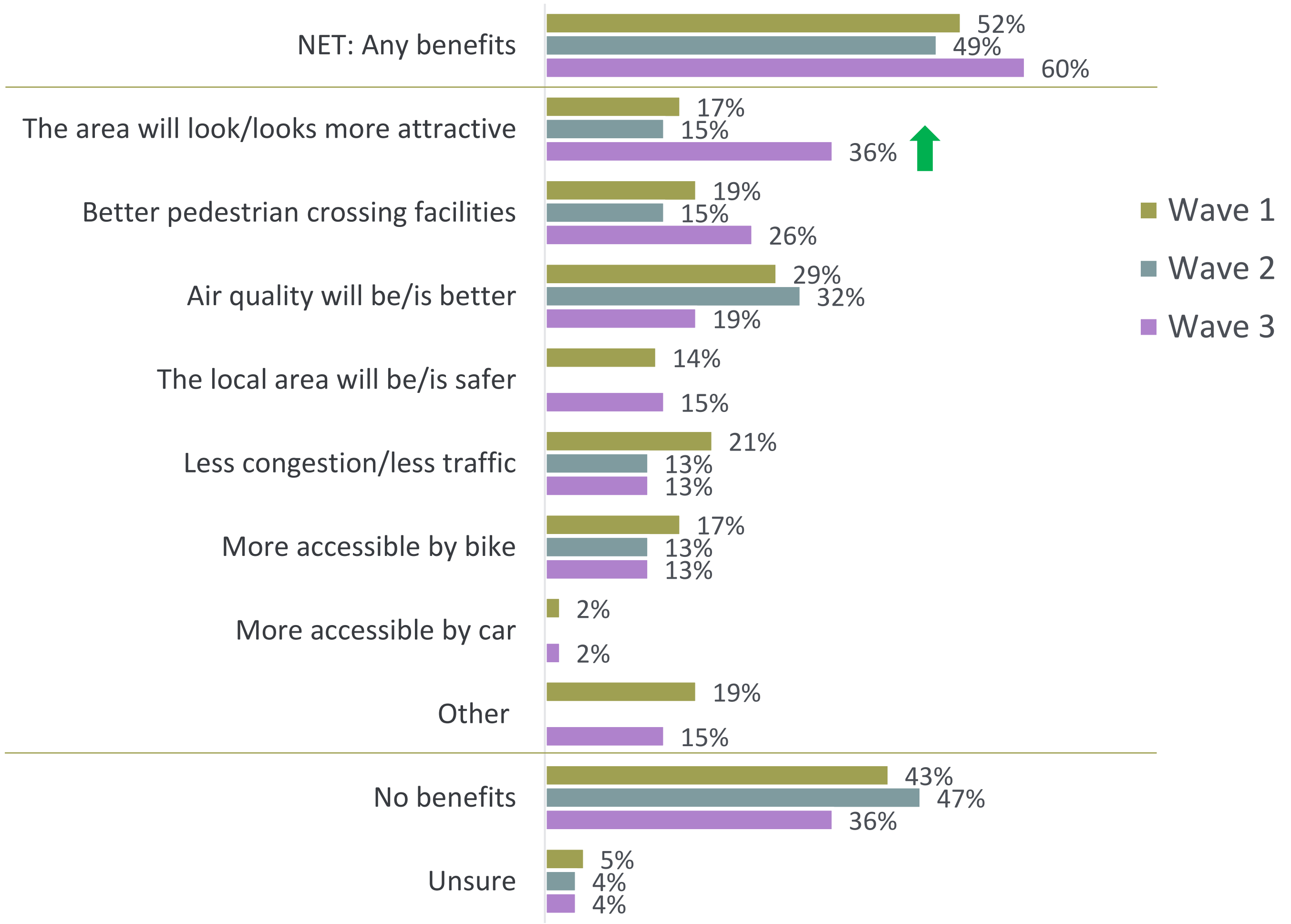


Q10: Do you, as a business, support or oppose the measures that will be/have been put in place for the low traffic neighbourhood? Base (all): W1 42, W2 47, W3 47

LTN measures
Perceived 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 Waves 2 and 3 they were asked what benefits/challenges there have been since the measures were implemented.
- In Wave 3, six out of ten identified any benefits of the LTN measures, not dissimilar to the proportion anticipating any benefits in Wave 1 (52%).
- Benefits identified in Wave 3 were most likely to be the area looking more attractive (36%), followed by better pedestrian crossing facilities (26%), better air quality (19%), and the local area being safer (15%).
- The only difference is the increase between the baseline wave and Wave 3 was in those feeling that the area looks more attractive (17% anticipated this in Wave 1 compared to 36% reporting it in Wave 3).
- It is also important to note that just over a third of respondents felt that the measures implemented had not brought any benefits to their business.

Benefits of LTN measures

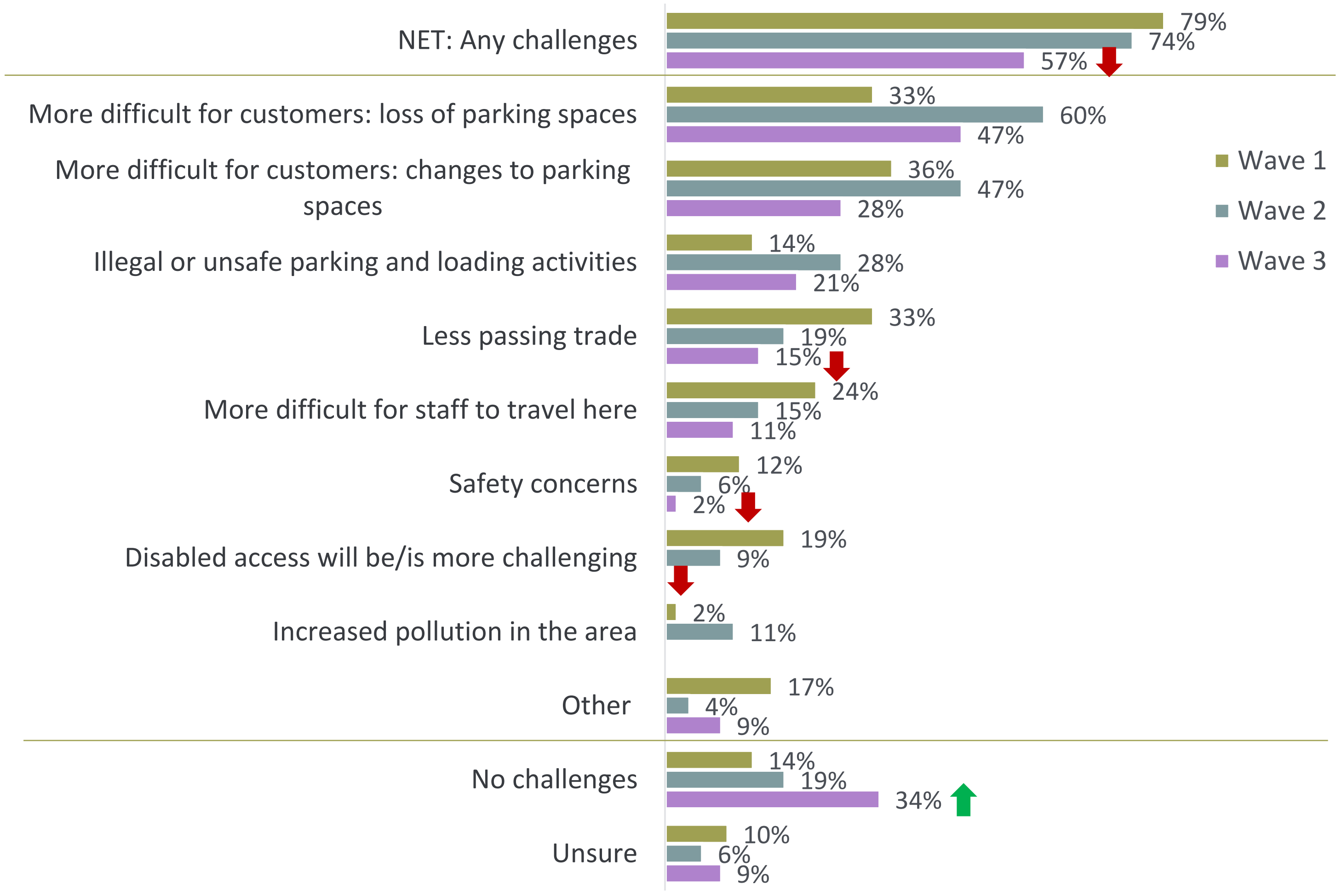


Q11: Do you think there will be/are any benefits to your business from the low traffic neighbourhood plans/measures? Base (all): W1 42, W2 47, W3 47

LTN measures
Perceived challenges

- Just under three fifths (57%) identified a challenge to their business associated with the LTN measures in Wave 3 – a decrease compared 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 (47%) or changes to parking spaces (28%), as well as illegal/unsafe parking and loading activities (21%), and less passing trade (15%; lower than the 33% who predicted this in Wave 1).
- No one this wave felt that disabled access is more challenging – a significant difference from Wave 1 when 19% predicted this would be a challenge faced by their business.

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, W3 47

LTN measures

Impact on footfall

- In Wave 1, around half of respondents anticipated that the LTN plans would have an impact on footfall to their premises, with an even split between those expected to see an increase and those expecting a decrease in footfall.
- The proportion that reported a change in footfall in Wave 2 was lower (32%) than expected it in Wave 1 (52%), however, most of these respondents reported a decrease.
- In Wave 3, 45% reported their footfall had been affected by the LTN measures. Among those who reported a change in footfall in Wave 3, more said it had decreased (71%) than said it had increased (29%), with the largest proportion saying footfall had decreased slightly (52%).
- The proportion saying they had experienced a slight decrease in footfall in Wave 3 was higher than the proportion that anticipated a slight decrease in footfall in Wave 1.
- Please note the very small base size for this question.

Impact of LTN measures on footfall

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	W1	W2	W3
Think footfall will be/has been affected	**52%**	**32%**	**45%**
Among those….			
Increase(d) significantly	9%	-	-
Increase(d) slightly	36%	20%	29%
Decrease(d) slightly	5%	53%	52% ⬆
Decrease(d) significantly	41%	27%	19%
Unsure	9%	-	-
NET: Increase(d)	***45%***	***20%***	***29%***
NET: Decrease(d)	***45%***	***80%***	***71%*** ⬆

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, W3 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, W3 21

Other comments – examples of feedback received

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It is good that people are able to walk more.

I think this area is nicer since they stopped all the traffic congestion, people can stroll around and enjoy the views of the water.

Detrimental effect due to permits and reduced parking, double yellows, noticeably quieter, even residents are saying it's quieter, not as vibrant, fewer people.

I think there is less traffic congestion so it makes this area look nicer and people love sitting outside looking at the beautiful views.

We are less visible; have had to change the model of our business by not welcoming clients into our office, affecting relationships and moving to online signing, meetings and viewings which means distance selling regulations apply, delaying the process.

Parking space hard to find and costly.

Cycle paths okay, but no provision for loading bays for all local businesses in the area.

This area is starting to look better and less congestion.

I was positive about it, but it's affected all businesses in the area detrimentally. Roadworks, people avoid coming down.

It's terrible, we are losing business as people can't stop and park. Also loading etc. is hard as the road can be blocked with cars illegally stopping.

It's harder to drive in, less business trade but busy in the summer with tourists.

It's a nicer looking area but there could be parking at one side of the street so it's not busy looking and still quiet.

Summary and conclusions

Summary and conclusions

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

Travel in the area

- The research findings suggest that people visiting businesses within the area are using more active travel options (more walking, and fewer are using the car) since the introduction of the LTN measures. As well as the introduction of the LTN measures, this may reflect slight changes in the profile of customers in terms of how locally they are travelling, with more businesses in Waves 2 and 3 saying customers tend to travel 1-3 miles compared to Wave 1 when more were travelling 6+ miles. It is also notable that fewer businesses reported staff travelling to work by car in Waves 2 and 3 compared to Wave 1.

Views of the area

- When asked to rate various aspects of the area around their premises, respondents expressed the highest levels of agreement that there are excellent public transport links, people like to spend time in the area, and that the area is safe for people to walk/wheel and cycle in. While agreement was lower in relation to the area being clean and well maintained, in Wave 3 most respondents did feel positively about the cleanliness of Leith, which was significantly better than in Waves 1 and 2.
- Changes in these perceptions amongst businesses were fairly limited from Wave 1 to Wave 2; however, in Wave 3 some good improvements were noted. This may be due to business owners/managers getting used to and adjusting to the LTN measures by Wave 3 and levels of disruption from road works diminishing.

Awareness and views of the Leith Connections project

- In Waves 2 and 3, after the measures were introduced, the vast majority of respondents were aware of the project, and the Council was the most common source of information about these measures, followed by word of mouth and social media.
- Whilst more respondents were in favour of the measures being introduced than were opposed to them in Wave 1, views were split in Waves 2 and 3 with similar proportions expressing support and opposition. In Waves 2 and 3, people were less likely to express a strong opinion either way, with just under a quarter saying 'neither/nor'.
- In Wave 3, six in ten identified any benefit of the LTN measures to their business, with the area looking more attractive, better pedestrian crossings and better air quality being most commonly mentioned.

Summary and conclusions

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- Over half identified challenges associated with the measures – most often these related to difficulties for customers because of loss of or changes to parking spaces, and illegal or unsafe parking and loading activities. The proportion identifying challenges was lower in Wave 3 compared to Waves 1 and 2.
- Almost half of respondents in Wave 3 reported that the LTN measures had affected their footfall – most commonly saying it had decreased.

Conclusions

- The views from the business community in Leith suggest that, since the LTN measures have been introduced, fewer staff and customers are travelling by car, and the area is perceived to be safer for cyclists and people walking/wheeling. There have also been improved perceptions in relation to how the local area looks (being attractive and being clean and well maintained) meaning that Leith is an area that people like to spend time in.
- However, despite this, there was a mixed response in terms of support for the LTN measures, with approximately equal proportions supporting and opposing the measures. Further, over half reported challenges for their businesses, particularly the loss of customer parking, and almost half had noticed a change in footfall, most often a decrease.
- In order to grow support for the Leith Connections project, local businesses should be kept informed of any further measures planned, and their views considered in the implementation of these plans. It is also important to highlight the positive outcomes for Leith so far, which may not be directly associated with the LTN measures in the eyes of the business owners/managers, i.e. they see Leith improving as an area but some do not support the measures, which may suggest they do not attribute these improvements to the Leith Connections project. Future communications should highlight holistically these benefits for the local environment and community, which should, in time, benefit both businesses and local residents.

Sample profile

Sample profile

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Location	W1 No.	W1 %	W2 No.	W2 %	W3 No.	W3 %
Henderson Street	12	29%	12	26%	7	15%
Great Junction Street	10	24%	18	38%	18	38%
The Shore	9	21%	6	13%	10	21%
Other*	11	26%	11	23%	12	26%
Base	**42**	**100%**	**47**	**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
W3: Sandport Place, Dock Street, Coburg Street, Giles Street, Henderson Gardens

Business type	W1 No.	W1 %	W2 No.	W2 %	W3 No.	W3 %
Shop – grocers, convenience store, bakery, butchers, deli, off-licence, supermarket, etc.	6	14%	7	15%	9	19%
Shop – gifts, clothes, books, electrical, music, etc.	3	7%	9	19%	4	9%
Shop – charity	7	2%	-	-	-	-
Net 'Shop'	*10*	*24%*	*16*	*34%*	*13*	*28%*
Food and drink – restaurant / café / pub (consumed on site)	17	40%	14	30%	18	38%
Takeaway food	-	-	3	6%	1	2%
Net 'Food and drink'	*17*	*40%*	*17*	*36%*	*19*	*40%*
Service, e.g. laundrette, bank, hairdresser, library, nail bar, travel agent, vet, post office	7	17%	6	13%	7	15%
Leisure, e.g. betting shop, fitness studio	2	5%	1	2%	1	2%
Health, e.g. GP, dentist, optician, pharmacy	1	2%	1	2%	1	2%
Other charitable organisation, e.g. foodbank, advice centre	-	-	1	2%	-	-
Other	5	12%	5	11%	6	13%
Base	**42**	**100%**	**47**	**100%**	**47**	**100%**

Sample profile

Time trading here	W1 No.	W1 %	W2 No.	W2 %	W3 No.	W3 %
Less than 1 year	5	12%	3	6%	5	11%
1-2 years	7	17%	2	4%	3	6%
3-5 years	4	10%	16	34%	12	26%
6-10 years	8	19%	15	32%	10	21%
11-20 years	5	12%	6	13%	12	26%
Over 20 years	13	31%	5	11%	4	9%
Prefer not to say	-	-	-	-	1	2%
Base	**42**	**100%**	**47**	**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 %**	**W3 No.**	**W3 %**	**W1 No.**	**W1 %**	**W2 No.**	**W2 %**	**W3 No.**	**W3 %**
1	6	14%	3	6%	3	6%	8	19%	7	15%	4	9%
2-3	12	29%	19	40%	16	34%	13	31%	22	47%	16	34%
4-5	6	14%	13	28%	2	4%	7	17%	7	15%	10	21%
6+	18	43%	12	26%	25	53%	14	33%	11	23%	14	30%
Prefer not to say	-	-	-	-	1	2%	-	-	-	-	1	2%
Average	*8*		*5.2*		*5.8*		*5.7*		*4.3*		*4.2*	
Base	**42**	**100%**	**47**	**100%**	**47**	**100%**	**42**	**100%**	**47**	**100%**	**47**	**100%**

Q1: How long have you been trading at this location?
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?

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/managers 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), 47 (wave 2), and 47 (wave 3).
- Fieldwork dates:
  - 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.
  - Wave 3 fieldwork was completed between 31st October and 14th November 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. 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.

Key contacts

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