

# Transport and Environment Committee

10am, Tuesday, 17 March 2015

## George Street Experimental Traffic Regulation Order Mid Year Review

Item number	7.10
Report number	
Executive/routine	
Wards	11 – City Centre

### Executive summary

On 29 April 2014, the Transport and Environment Committee approved a year-long trial to introduce an Experimental Traffic Regulation Order (ETRO) on George Street. The trial layout introduced a dedicated two-way cycle lane, additional pedestrian space, a one-way traffic management system, and additional space that businesses, Festivals and events could animate, to bring new activity to the street.

The trial began on 8 September 2014 and will end in September 2015. This report outlines what measures have been put in place and what outcomes have been identified in the first six months of the trial. It also outlines what work will take place in the final six months of the trial.

An independent design options process has been initiated, supported by an empirical and independent piece of research work which is canvassing the views and patterns of movement of 100 people a month. At the completion of the trial a report will come to Committee outlining the views of users of the street, accompanied by options for the long-term design of the street. The designs will seek to maintain a strong identity for George Street and aims to take account of surrounding transport and retail developments.

### Links

Coalition pledges	<a href="#">P24</a> , <a href="#">P28</a> , <a href="#">P31</a>
Council outcomes	<a href="#">CO19</a> , <a href="#">CO20</a>
Single Outcome Agreement	<a href="#">SO1</a> , <a href="#">SO4</a>

## George Street Experimental Traffic Regulation Order Mid Year Review

### Recommendations

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- 1.1 It is recommended that the Transport and Environment Committee:
  - 1.1.1 notes the contents of this mid-year report;
  - 1.1.2 agrees to accept a further report on the outcomes of the Experimental Traffic Regulation Order (ETRO) trial, design options for the long-term layout of the street and a summary of the research outcomes in November 2015;
  - 1.1.3 notes that a further report will be brought to this Committee in June 2015, on the options for reviewing cycling provision and other successful aspects of the ETRO road layout, on an interim basis.

### Background

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- 2.1 On 29 April 2014, the Transport and Environment Committee approved a year-long trial on George Street. Using an ETRO, this introduced a dedicated two-way cycle lane, additional pedestrian space, and a one-way traffic system for motor vehicles.
- 2.2 The purpose of the trial is to test different ways of animating the space, to improve the vibrancy of the street, and to assess the transport impact on George Street and surrounding roads when part of the street is closed to traffic. George Street is a key part of the city's UNESCO World Heritage Site, a key retail street, an important street for the local hospitality industry, and a place where people live, work, visit, park, shop, worship, commute through and socialise.
- 2.3 George Street is a key part of Edinburgh's dynamic city centre. A major mixed use high quality development is planned for the St James' Quarter to the east, while people's patterns of movement, modes of transport, shopping habits and socialising habits are undergoing major changes in most major city centres across the UK.

- 2.4 The trial year is accompanied by a major piece of research work and a design options process. These will provide a baseline of empirical evidence on how people move round the city centre, their mode of transport, movement patterns, reasons for visiting, length of stay, shopping habits and how people feel about the city centre and its purpose. This baseline information is important. It will help inform future design, planning, transport and economic development decisions relating to George Street and the wider city centre to be evidence-based.

## Main report

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- 3.1 Following Committee approval for the George Street ETRO in April 2014, the installation of a one way traffic management system took place between 16 June and 1 August 2014. These works also introduced a two way dedicated cycle lane and additional pedestrian space on the non-vehicular traffic side of the street. The new layout retained 91% of on-street parking spaces, including pay and display, City Car Club, motor cycle, disabled and residents' parking bays. Any taxi stances on the non-traffic side of the street were repositioned within the same block and part-time loading facilities were introduced in the central reservation. The installation work was delivered on time and on budget.
- 3.2 All materials used in the project are recyclable or reusable. The public consultation had made clear that a key consideration for the project was to maintain the safety of cyclists and pedestrians while not using metal barriers. As a time-limited experimental TRO any materials used also had to be removable at short notice.
- 3.3 The only materials used by the Council in the project have been temporary road signs and signals, rubber kerbs, and planters. The planters were commissioned and manufactured in Edinburgh, using traditional wrought iron materials and construction techniques, made at the Inch Nursery by skilled craftsmen assisted by local apprentices employed through the Edinburgh Guarantee scheme. This "Made in Edinburgh" aspect of the project has been widely supported by stakeholders.
- 3.4 As all materials used in the project have been recyclable or reusable the project may end up close to cost-neutral upon completion, given that the planters, rubber kerbs and traffic signs and signals may be sold on to external purchasers, or used on other Council projects elsewhere in the city.

- 3.5 The only other finance spent by the project has been on research and design packages, all of which were procured through competitive tendering processes, to ensure best value was sought. A key piece of work, undertaken by the project, was to create a public oversight group for the key research project. This oversight group includes the local Community Council, voluntary sector groups, disability groups, heritage bodies, transport groups, the Emergency Services, Essential Edinburgh, Elected Members, interested members of the public and Council officials. This was to ensure that all stakeholders could influence the research project and ensure that it did not overlook any issues relevant to them.
- 3.6 The research company is interviewing 100 people a month on George Street, as well as surveying businesses and bus passengers. Its final research analysis will be presented to Committee in a report in November 2015 (the latest update from the research together with the minute of December 2014 Quarterly Stakeholders can be found in Appendices 1 and 2).

### **Summary of trial outcomes at Mid Year point**

- 3.7 The Council's intended outcomes for the trial appear to have been realised, to date. Footfall has increased along all four blocks of George Street. People who visit George Street are lingering longer, typically visiting the street for around three hours or more at a time. People are also returning more frequently to the street than they did previously and are reporting that they would like to see greater pedestrianisation introduced in the long run. The initial research has identified an apparent trend, that the project will continue to monitor, where there appear to be more people visiting the city centre yet fewer private cars using the roads. This suggests an increase in use of public transport and other more sustainable modes of transport.
- 3.8 The research outcomes provided interesting and challenging insights into customer behaviour for retailers. The number one reason interviewees give for visiting George Street (38%) is window shopping. "Shopping" comes much lower down, at fourth on the list of reasons for visiting George Street (20%). The increase in footfall numbers, and the fact people linger longer on the street, has not translated automatically to increased sales at the till. There appears to be 'showrooming' taking place, where consumers will test out a product in-store but then purchase online. Converting increased footfall and window-shoppers into increased sales is a challenge for the retailers, but business groups have welcomed the insights provided by the Council's research package.
- 3.9 The trial approach, accompanied by a robust research package, gives the Council the flexibility to adapt to unforeseen circumstances or issues that arise from the initial street layout. A number of alterations have been able to be made, in response to issues being raised by stakeholders (typically local residents or businesses). In each case the Council received the complaint, investigated the matter, and used evidence-based research to ascertain if a problem existed.

- 3.10 Where issues were found to be present, the Council then addressed the issue quickly and made the required changes. Examples include repositioning a temporary taxi stance in the easternmost block, reversing the one-way traffic flow in an adjacent street (Young Street) in response to an increase in the volume and speed of traffic there, and introducing bollards at the entrance to the pedestrian and cycle lanes, to protect cyclists and pedestrians from a small number of dangerous drivers who continued to drive in the pedestrianised areas.
- 3.11 The Council was not the only organisation to introduce street furniture as part of the trial. Hospitality businesses on George Street received a time-limited planning permission for decking and marquees to help animate the space for the duration of the trial. This would test out if café culture could be considered to be a year-round phenomenon in Edinburgh. The Council's aspirations were that any animation of the streetscape would provide a more vibrant atmosphere for the wider public street, and not hinder the Emergency Services or any civic use of the civic space on which they stood.
- 3.12 The decking and marquees have consistently drawn criticism from a range of stakeholders throughout the trial. The main criticisms are:
- their appearance is considered to be not in-keeping with George Street;
  - they are too permanent – they could not be removed for a major civic event like Light Night in November 2014, and
  - they 'box in the buzz', and animate a private space that fails to bring atmosphere to the wider street.
- 3.13 There are other ways of animating a public street that allows for unhindered civic use of civic space on demand, all year-round, and businesses have been asked to consider alternatives to the decking and marquees.

### **The second half of the trial**

- 3.14 The customer research package will continue to interview 100 people per month on George Street, building up a baseline of key information on how people access the city centre, how they perceive it, how they use it and how frequently.
- 3.15 Two additional pieces of research work are being undertaken which will contribute to the creation of a comprehensive baseline of information on patterns of movement that is crucial to future design, transport, economic development and planning decisions in the city centre. A more comprehensive survey of businesses on George Street and surrounding streets will be undertaken. Also a bus passenger survey will take place to understand passenger destinations better, where they interchange, and the impact of bus stop positioning on people's movement patterns.
- 3.16 The outcomes of these research workstreams will be reported to Committee following the completion of the George Street trial. Updates will be produced at quarterly intervals to the quarterly stakeholder group.

- 3.17 Aside from the research work, a design process will take place. This will be led by an independent designer. They will lead and facilitate discussions, in meetings that will be open to all stakeholders (including residents, businesses, those with a particular expertise, and the wider public) to agree design principles for George Street, similar to the process that was undertaken in the Grassmarket when its long-term layout was being considered. Once the design principles are agreed, a range of options for the street layout will be examined. The output of this process will be a SWOT analysis, detailing the strengths, weaknesses, opportunities and threats arising for the street in the long term. The design process will also produce updates for the quarterly stakeholder group, and its outcomes will be reported to Committee at the completion of the George Street trial.
- 3.18 The design work will be undertaken in the context of the dynamic nature of Edinburgh's city centre and the habits of its users, all of which are changing, as well as the learning points the Council's research has highlighted about pedestrian movements, cycling and the importance of returning the street to its original symmetry. It will take account of the Council's aspiration that civic space should be animated in a way that is temporary, that brings vitality to the street, that complements the world heritage setting, and which does not hinder civic events taking place.
- 3.19 On 1 September 2015, work will begin to remove the temporary materials and the businesses' decking and marquees that have been introduced onto George Street for the trial year. Although there may be some aspects of the ETRO that would feature in the design options for the future layout of George Street it is not possible to retain these on a permanent basis without going through the process of promoting a new TRO. The Experimental TRO is time-limited, and on its expiry the previous road layout and traffic management arrangements are considered to be automatically reinstated. The legal process attached to ETROs specifically rules out the possibility of retaining a trial layout and interim traffic management arrangements until a permanent TRO is implemented. In particular, any measure that would make loading restrictions more onerous would automatically trigger a hearing in the event of objections being received.
- 3.20 Therefore for the period of time that the future layout of the street is being debated and approved, the street will revert to its previous layout, with two lanes of eastbound traffic and two lanes of westbound traffic. There are some aspects of the trial layout that have been widely welcomed. Consideration can be given as to whether the setted parking bays in the middle of George Street should be returned for use as parking or for some other purpose as civic space/public realm, and whether a cycling facility could be retained on a more conventional layout, with eastbound traffic on the northern carriageway and westbound on the southern carriageway.

- 3.21 It is proposed to bring back a further report to this Committee in June 2015 on the options for reviewing cycling provision and other successful aspects of the ETRO road layout on an interim basis.

## Measures of success

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- 4.1 Increased footfall and spend within the city centre.
- 4.2 An improved position in the UK retail rankings.
- 4.3 A more attractive environment for those travelling to, living in, working and visiting the area delivered in line with a long term strategic vision.
- 4.4 The delivery of a project within agreed timescales and budget.
- 4.5 Increased animation to bring vitality to the public space but that does not inhibit its use for civic and cultural events.

## Financial impact

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- 5.1 The cost for implementing the proposal will be contained within the Services for Communities budget. Any items and materials procured to enable the trial to take place have been selected on the basis that they have a resale or reuse value, where practicable. When the trial concludes these items can be sold on or used by the Council elsewhere in the city. This will enable the project to conclude close to cost neutral. The precise costs will be reported at the conclusion of the trial.
- 5.2 The number of pay and display parking spaces has reduced during the trial year. Revenue levels will be reduced as a consequence, and the precise reduction will be reported in detail on completion of the trial.

## Risk, policy, compliance and governance impact

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- 6.1 The proposals emerged from a report to the Transport and Environment Committee on 29 October 2013 "Building a Vision for the City Centre - Consultation Outcome".
- 6.2 The proposals have been developed in consultation with stakeholders in line with the design brief and recommendations laid out in that report.

- 6.3 An ETRO provides a flexible opportunity for a Local Authority to test out different transport and public realm layouts for a set period of time, but the legal process governing ETROs does not allow for the traffic order to continue beyond its expiry date, in this case September 2015. The project has identified that it will be important to publicise the fact the street will return to four lanes of traffic in September 2015, for the period while the future layout of the street is being considered and the appropriate traffic regulation order is processed.

## Equalities impact

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- 7.1 An Equalities and Rights Impact Assessment (ERIA) has been carried out and is ongoing for the duration of the wider George Street Experimental Traffic Regulation Order (ETRO) project, which will run until September 2015.
- 7.2 The layout of the street has been influenced by consultation feedback from a wide variety of equalities groups, to ensure ease of access could be maintained for all equalities groups, including by ramp access onto any outdoor seating areas. This was previously reported to Committee on 29 October 2013 and 29 April 2014.
- 7.3 The incidence of crime and air quality levels on George Street and surrounding streets are being monitored as part of the research package which will run for a year alongside the proposed George Street trial. Local residents' groups have been included in specifying the research package, to help ensure the right information is captured, recorded and analysed.

## Sustainability impact

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- 8.1 The delivery of improvements in the city centre will help increase pedestrian and cycling activity in the area. In addition to introducing a café culture, the wider George Street trial should reduce carbon emissions in the street. Sustainability impacts, including air quality and traffic movement in the street and the surrounding area, will be assessed as part of the evaluation of the trial project.

## Consultation and engagement

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- 9.1 An Experimental Traffic Regulation Order has so far proved to be an effective means of engaging interested groups in the policy-making process. An extensive pre-consultation design exercise took place in January, February and March 2014. A quarterly stakeholder group has governance and oversight over the extensive research project that is being delivered as a key aspect of the project. The wide range of stakeholder groups includes:
- the New Town & Broughton Community Council and individual members of the public;
  - residents' groups from the local neighbourhood including Heriot Row, Albany Street, Drummond Place, Great King Street, Great Stuart Street and others;
  - transport bodies such as Spokes, Sustrans and Living Streets;
  - heritage bodies Historic Scotland and Edinburgh World Heritage Trust;
  - the emergency services; and
  - local and national bus operators, taxi operators, and local businesses, which were contacted through Essential Edinburgh.
- 9.2 A variety of Council Departments have also been included in the consultation and design process.

## Background reading/external references

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[City of Edinburgh Council – Local Transport Strategy 2014 - 2019](#)

[Building a Vision for the City Centre, Transport and Environment Committee, 19 March 2013](#)

[Building a Vision for the City Centre- Consultation Outcome, Transport and Environment Committee, 29 October 2013](#)

[George Street Experimental Traffic Regulation Order, Transport and Environment Committee, 29 April 2014](#)

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## Links

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<b>Coalition pledges</b>	<p><b>P24</b> – Maintain and embrace support for our world-famous festivals and events</p> <p><b>P28</b> – Further strengthen our links with the business community by developing and implementing strategies to promote and protect the economic well being of the city.</p> <p><b>P31</b> - Maintain our City’s reputation as the cultural capital of the world by continuing to support and invest in our cultural infrastructure.</p>
<b>Council outcomes</b>	<p><b>C19</b> – Attractive Places and Well Maintained – Edinburgh remains an attractive city through the development of high quality buildings and places and the delivery of high standards and maintenance of infrastructure and public realm</p> <p><b>C20</b> – Culture, sport and major events – Edinburgh continues to be a leading cultural city where culture and sport play a central part in the lives and futures of citizens.</p>
<b>Single Outcome Agreement</b>	<p><b>SO1</b> – Edinburgh’s economy delivers increased investment, jobs and opportunities for all.</p> <p><b>SO4</b> – Edinburgh’s communities are safer and have improved physical and social fabric.</p>
<b>Appendices</b>	<ol style="list-style-type: none"><li>1 First Quarterly Research Outcomes</li><li>2 Minutes of the public George Street Trial Quarterly Stakeholder Meeting (16 December 2014)</li></ol>

# George Street ETRO

## Visitor Research

*Quarter 1 Findings*  
*September to November 2014*

Key Findings Presentation  
*December 2014*



# What are we doing?

## Aim

- To understand visitors to George Street:
  - Profile and reason for visit
  - Attitudes towards George Street generally
  - Their views on the ETRO changes specifically
  - Perceptions of the future of George Street

## Survey

- 100 interviews completed each month
- Interviews spread across days of the week (including weekends), times of the day (including evenings) and across all 4 blocks of George Street
- Respondents stopped on a 'next to pass' sampling methodology
- Minimum target quotas set for New Town residents, cyclists and drivers

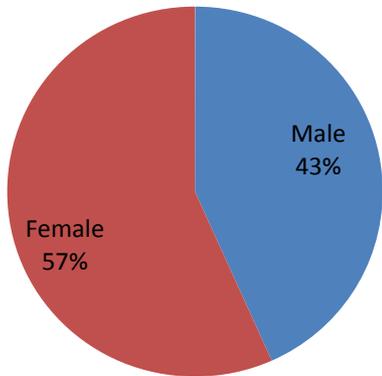
## Output

- 300 interviews carried out between September and November 2014

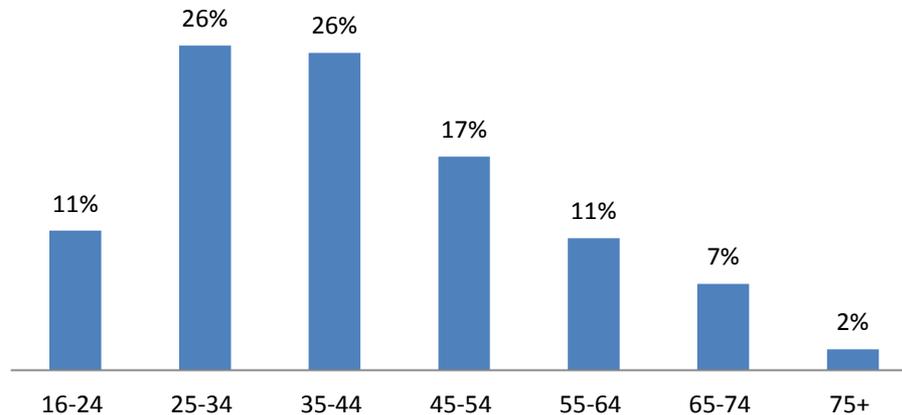
# Respondent profile (September – November, n=300)



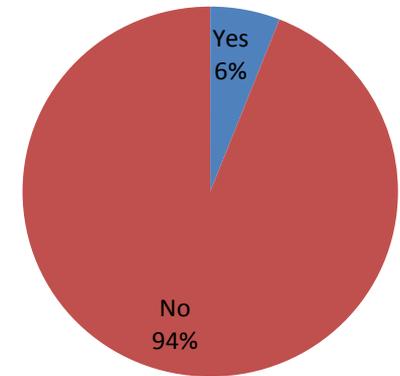
## Respondent Gender



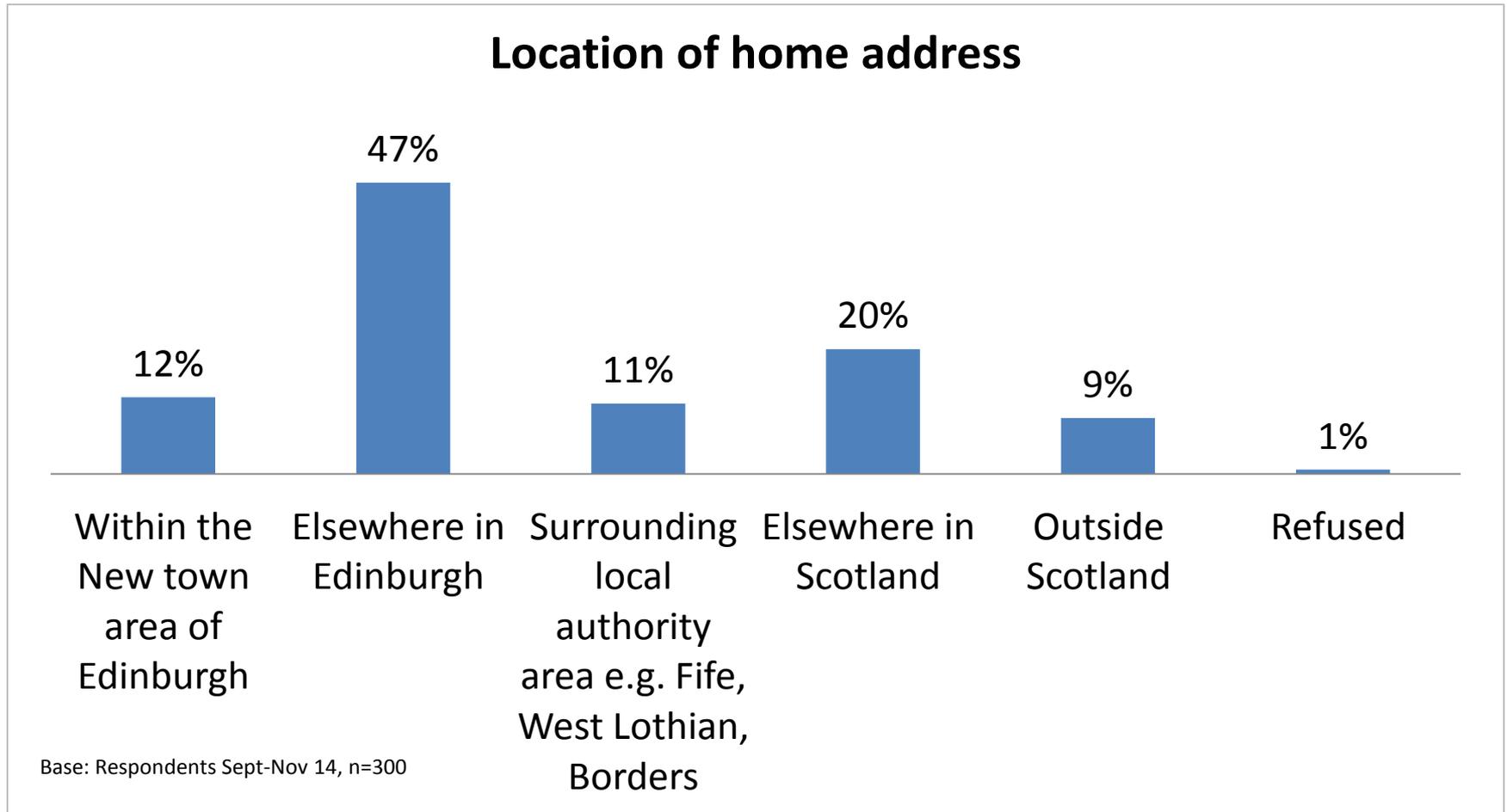
## Respondent age



## Disability



# Home location of respondent



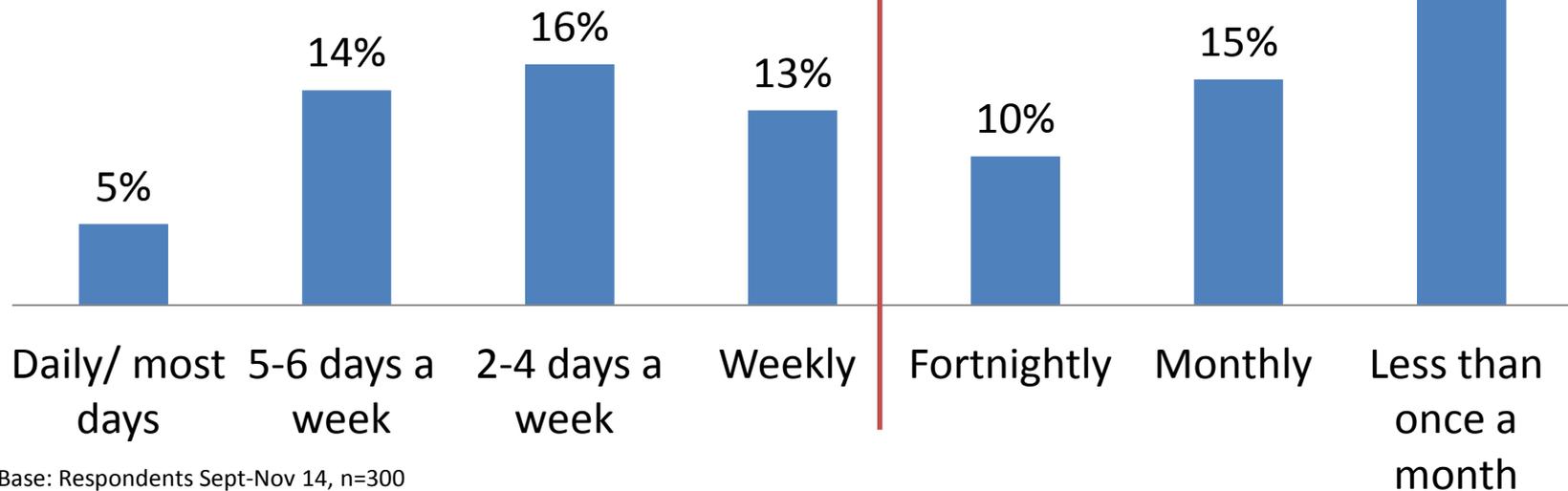
# Profile of visits

# Almost half visit at least once per week

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

New town residents visit most frequently (92% at least once per week)

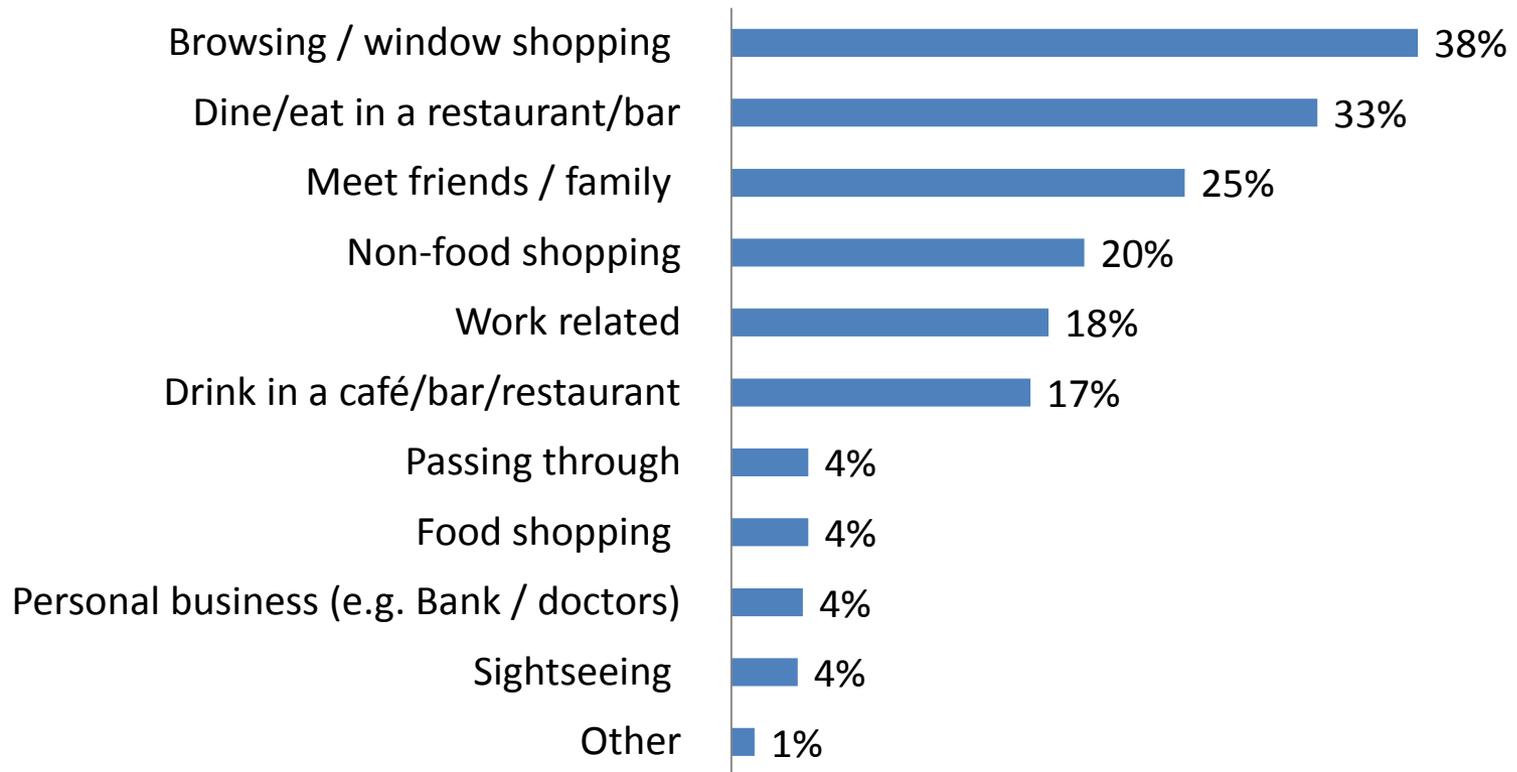
Elsewhere in Scotland (72%) and Outside Scotland (68%)



Base: Respondents Sept-Nov 14, n=300

# Browsing and dining are the main reasons for visiting George Street

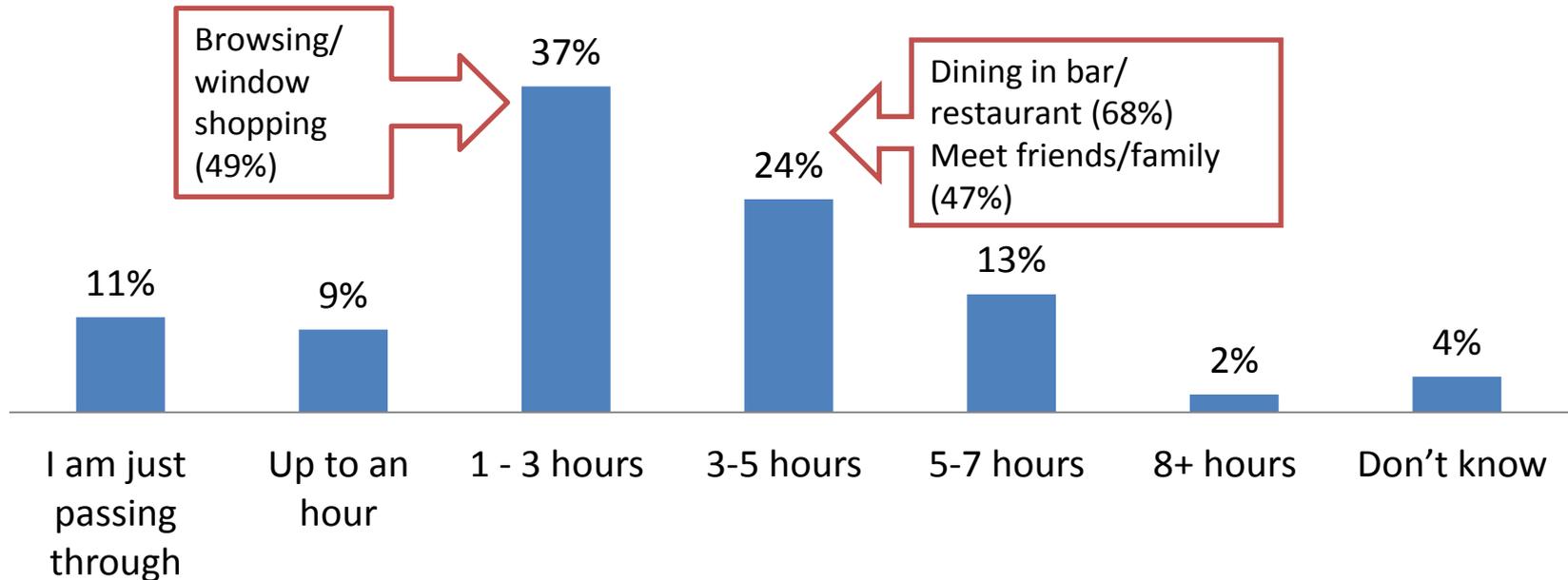
## Q3 What is the purpose of your visit to George Street today?



Base: Respondents Sept-Nov 14, n=300

# Almost two thirds of visitors stay between 1 and 5 hours

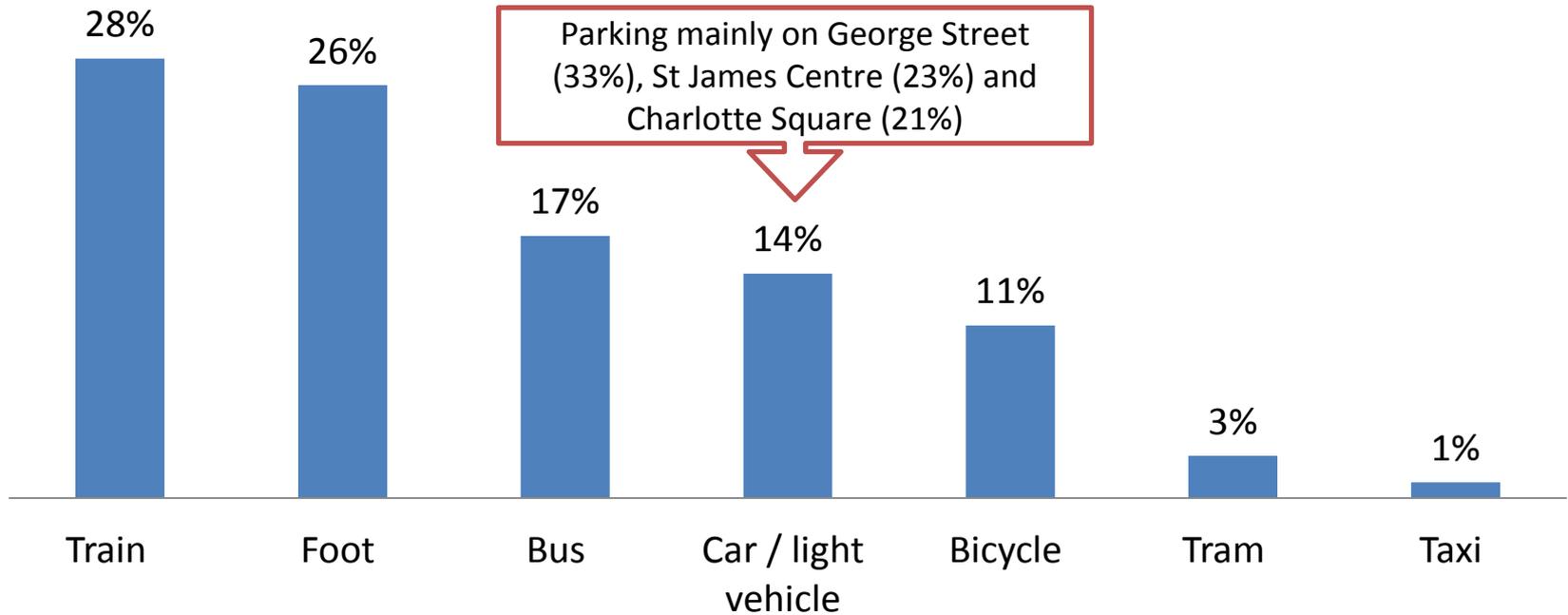
## Q4 How long do you intend to spend in George Street today?



Base: Respondents Sept-Nov 14, n=300

# Visitors most likely to travel by train or foot

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



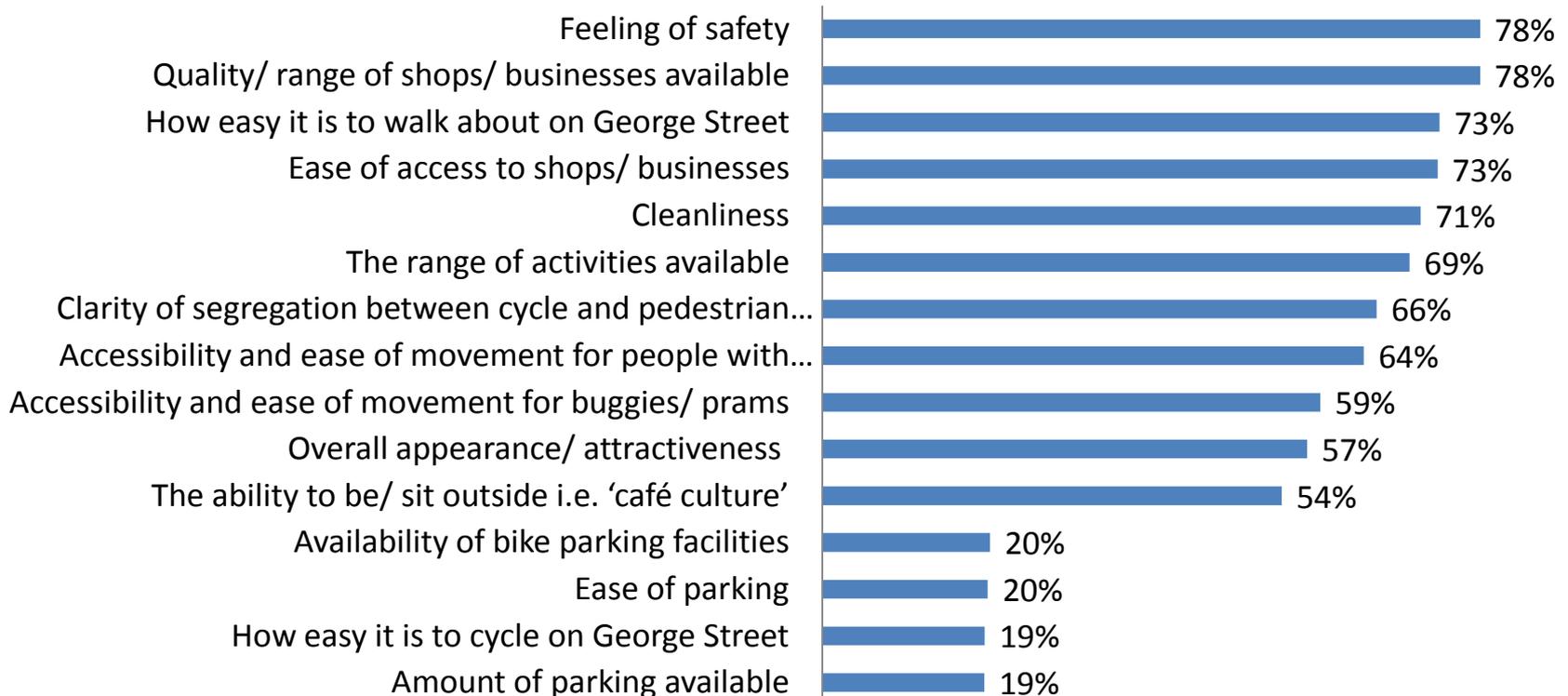
Base: Respondents Sept-Nov 14, n=300

# Perceptions and Experience of George Street

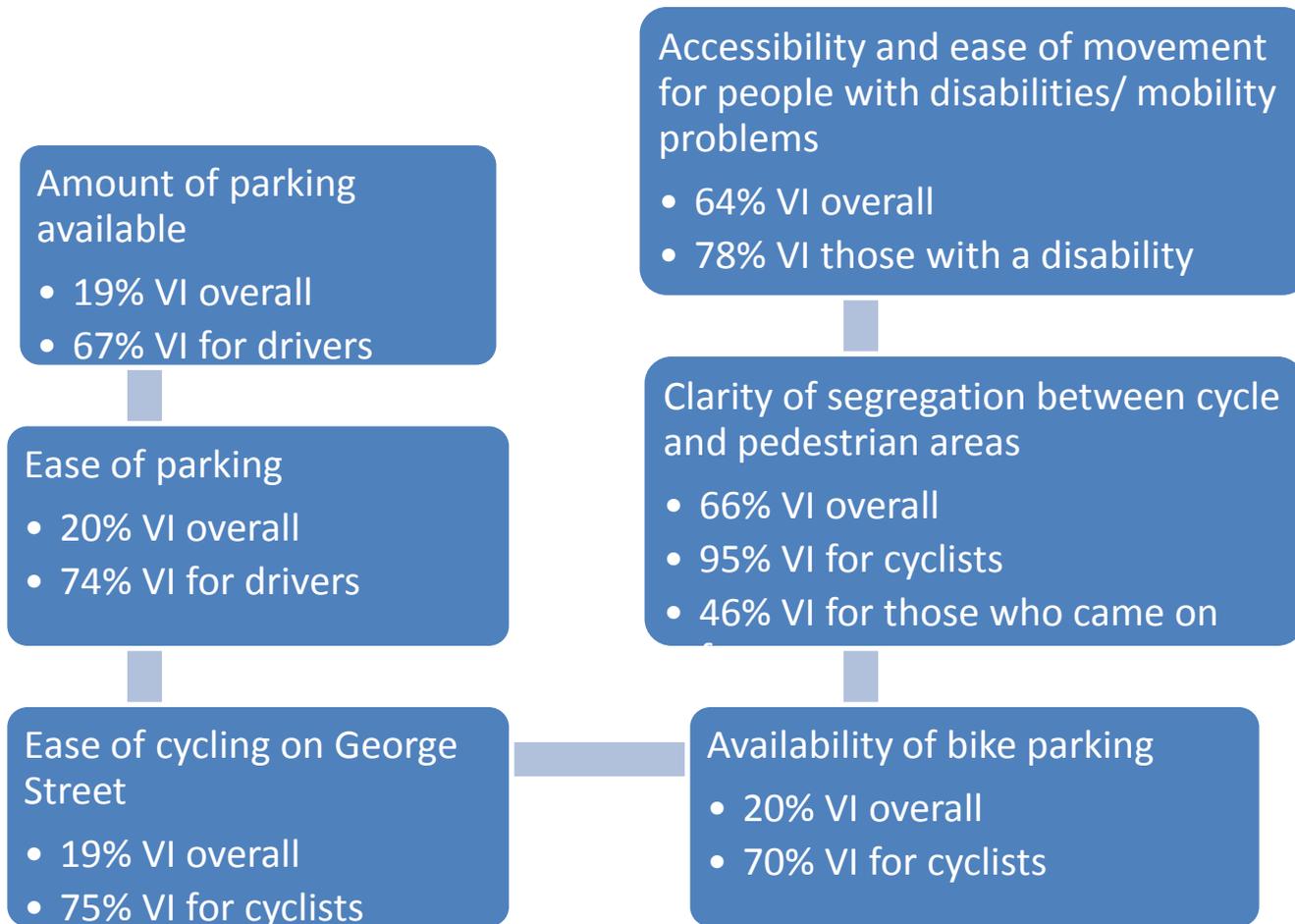
# Feeling of safety and Quality/ range of businesses most likely to be very important

**Q6 When thinking about your decision to come to George Street today, how important were the following?**

■ % very important (excl DK)



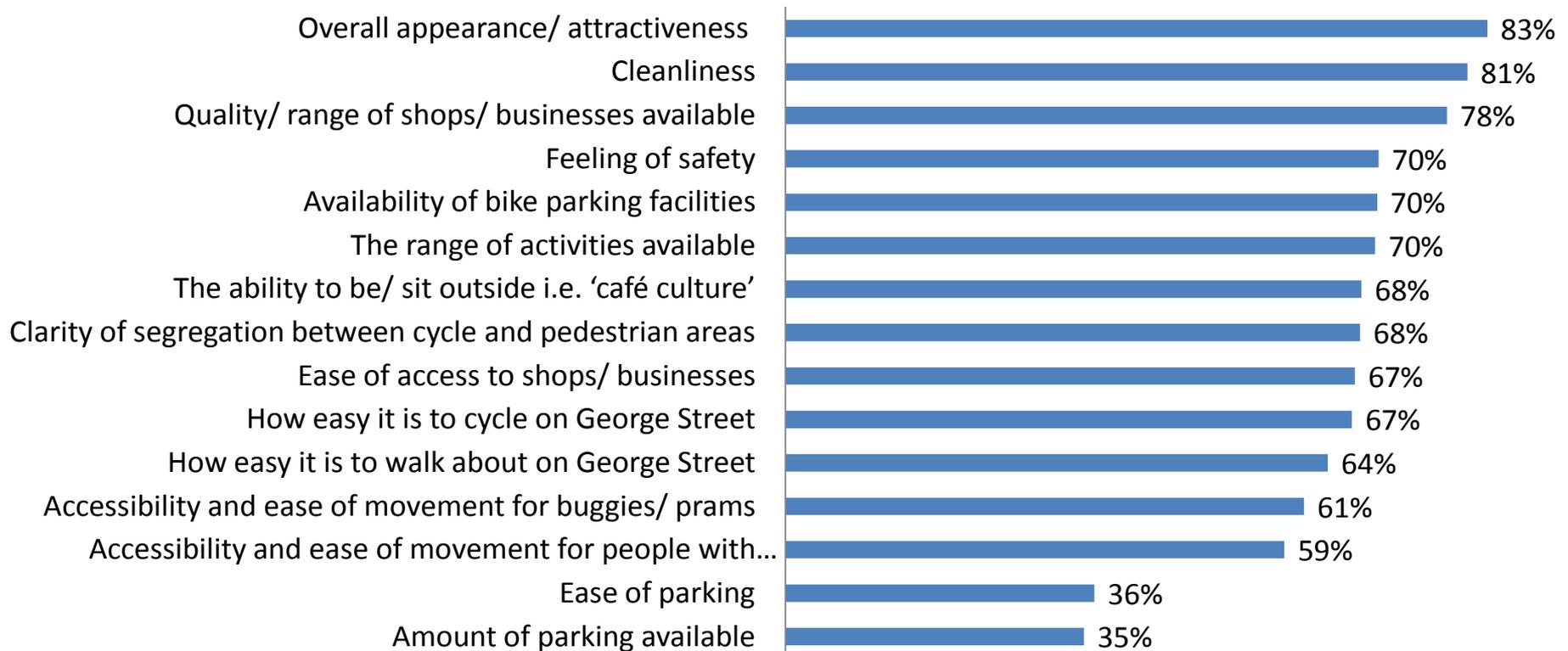
# What is important varies for different groups



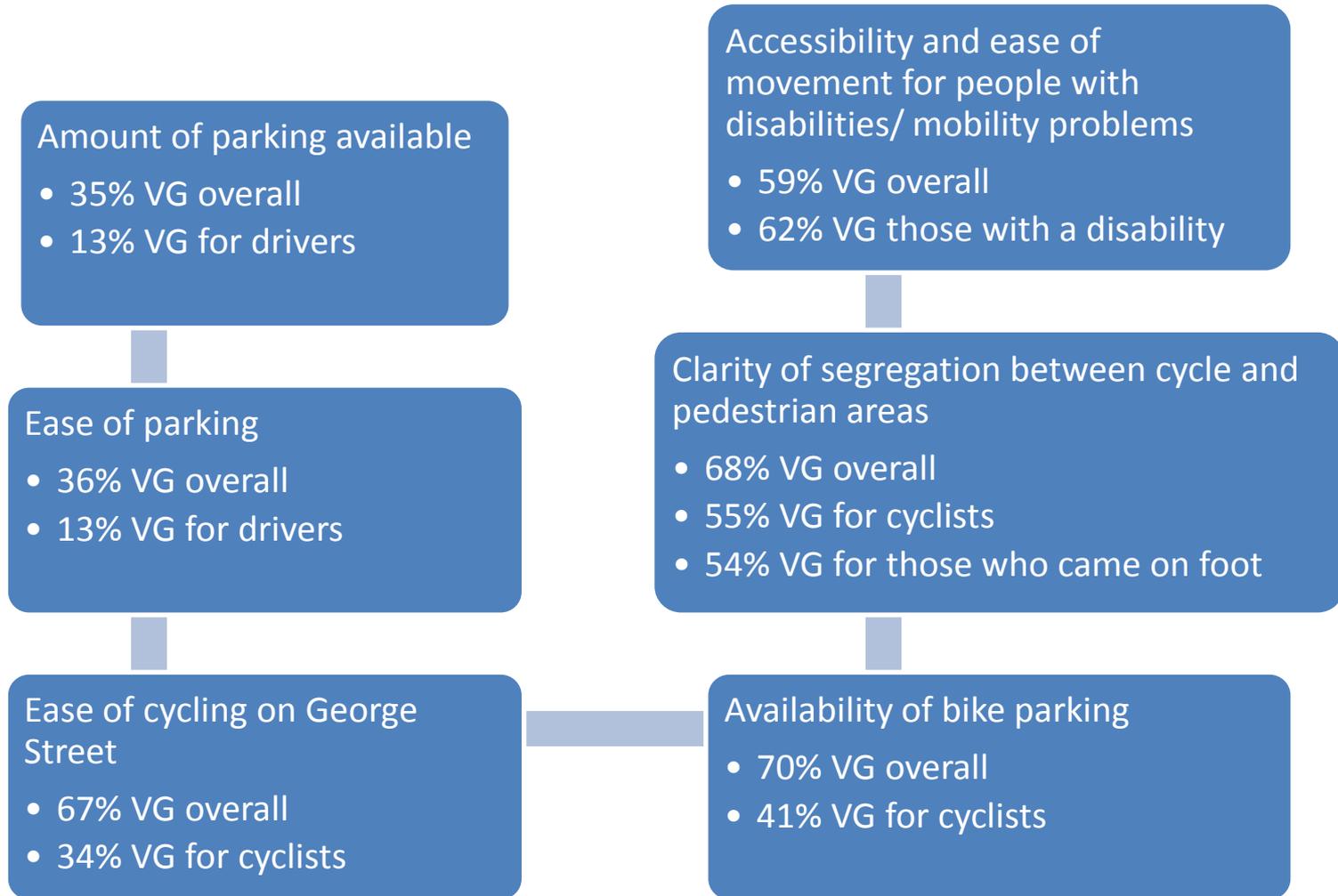
# Overall appearance, cleanliness and quality of businesses most highly rated

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

■ % very good (excl DK)



# How visitors rate aspects also varies



# GAP Analysis of George Street

## Priority for action



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

## Consider for action



- Clarity of segregation between  
cycle and pedestrian areas  
(cyclists)
- Availability of bike parking  
facilities (cyclists)
- Ease of cycling (cyclists)
- Amount of parking available  
(drivers)
- Ease of parking (drivers)

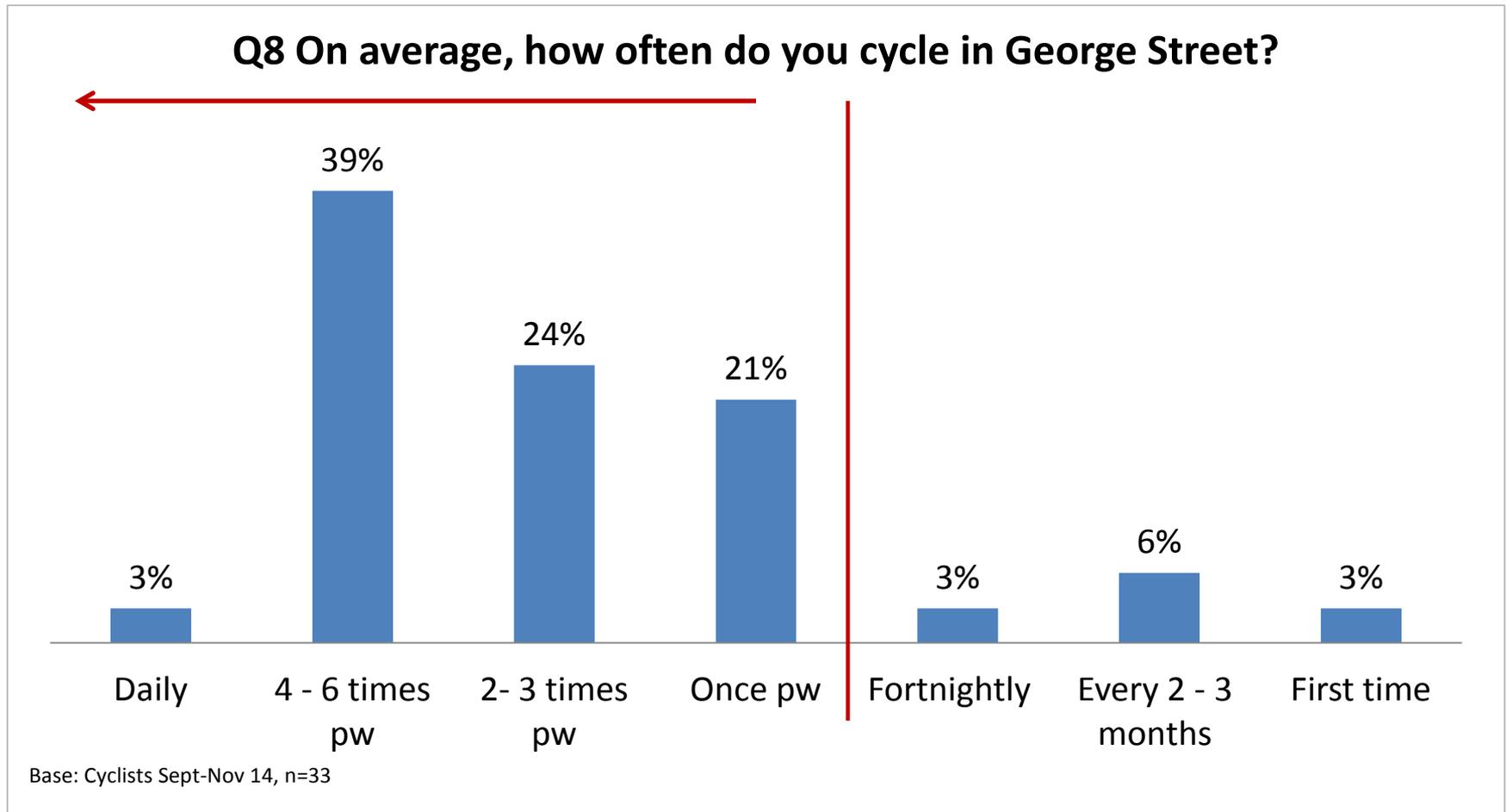
## Maintain



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

# Cyclist Experience

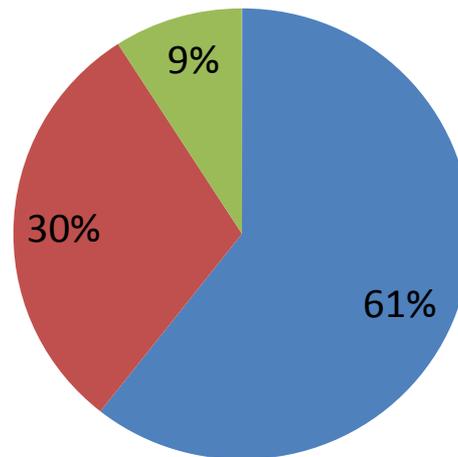
# Cyclists tend to cycle in George Street regularly – 87% at least once per week



# The majority travel along the length of George Street

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

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

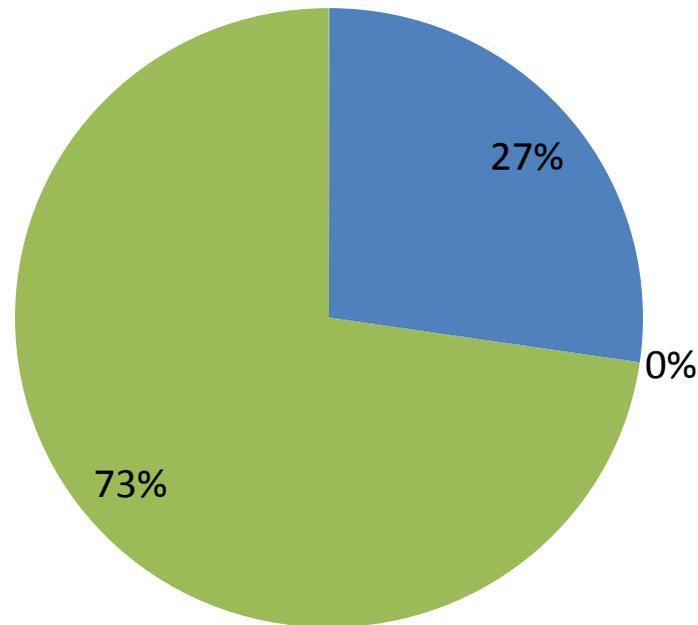


Base: Cyclists Sept-Nov 14, n=33

# Just over one quarter now cycle more

## Q9 Has this changed since the introduction of cycle lanes?

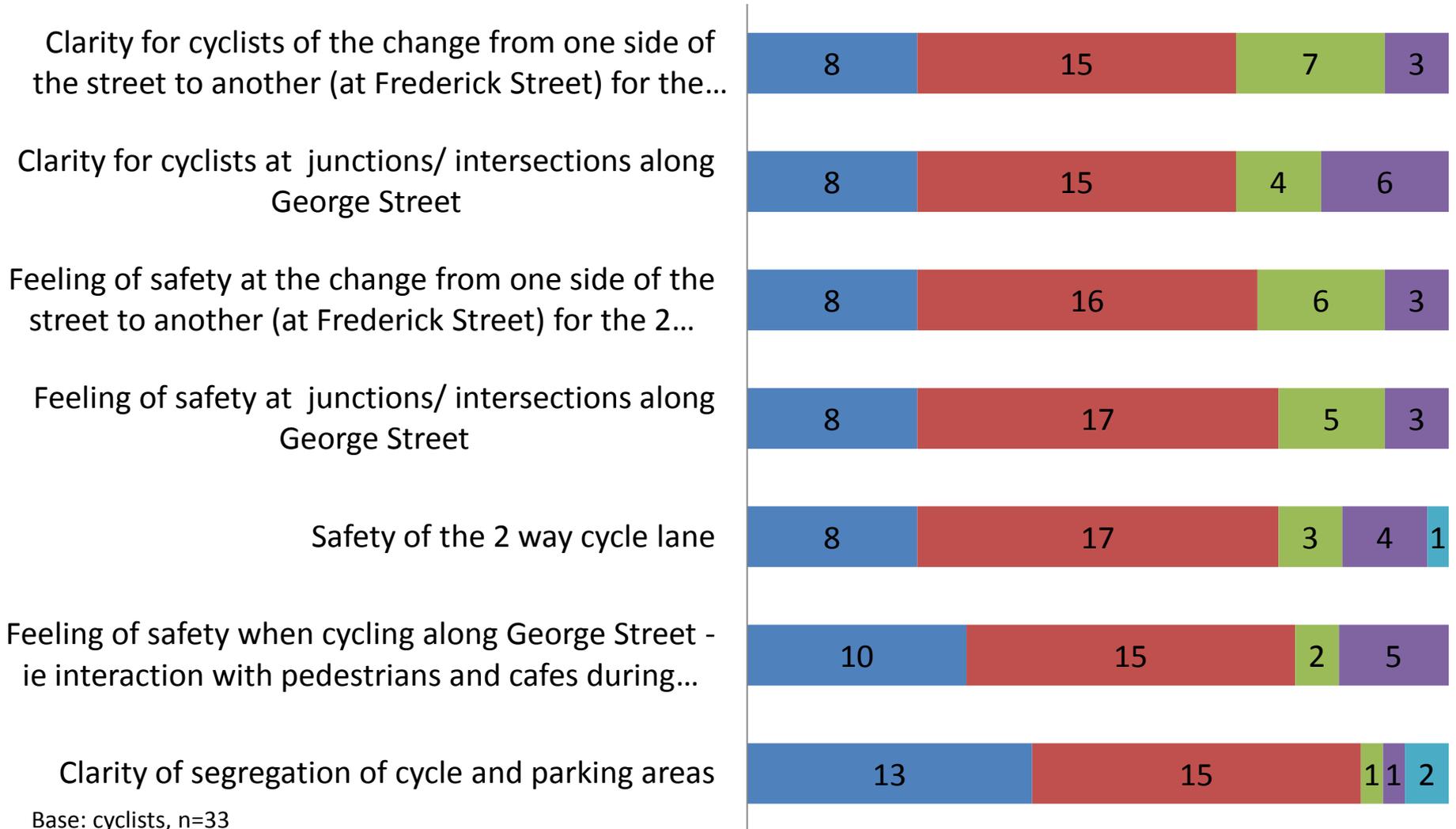
■ Yes, I now cycle more    ■ Yes, I now cycle less    ■ It has not changed



Base: Cyclists Sept-Nov 14, n=33

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

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



Base: cyclists, n=33

# Cyclist comments

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

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

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

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

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

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

# Suggestions for improvement

Make it on both sides and pedestrianise whole area.

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

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

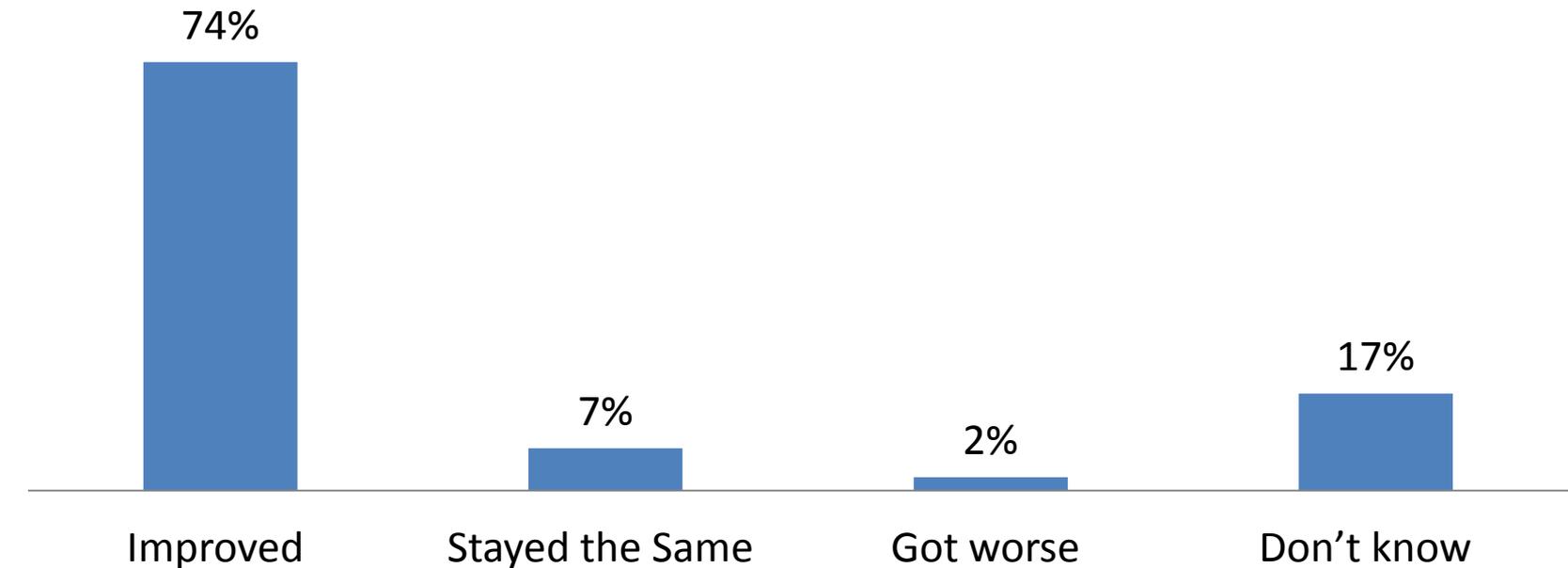
More signage and cycle lane all on one side

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

# Perceptions of Change in George Street

# The majority think George Street's appearance has improved

**Do you think the overall appearance of George Street has improved or worsened since the changes or is it no different?**



Base: Respondents Sept-Nov 14, n=300

# Respondents gave a range of reasons for perception of improvement

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

# Just 7 respondents felt the overall appearance had worsened

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

Not as much parking, nightmare to drive to.

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

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

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

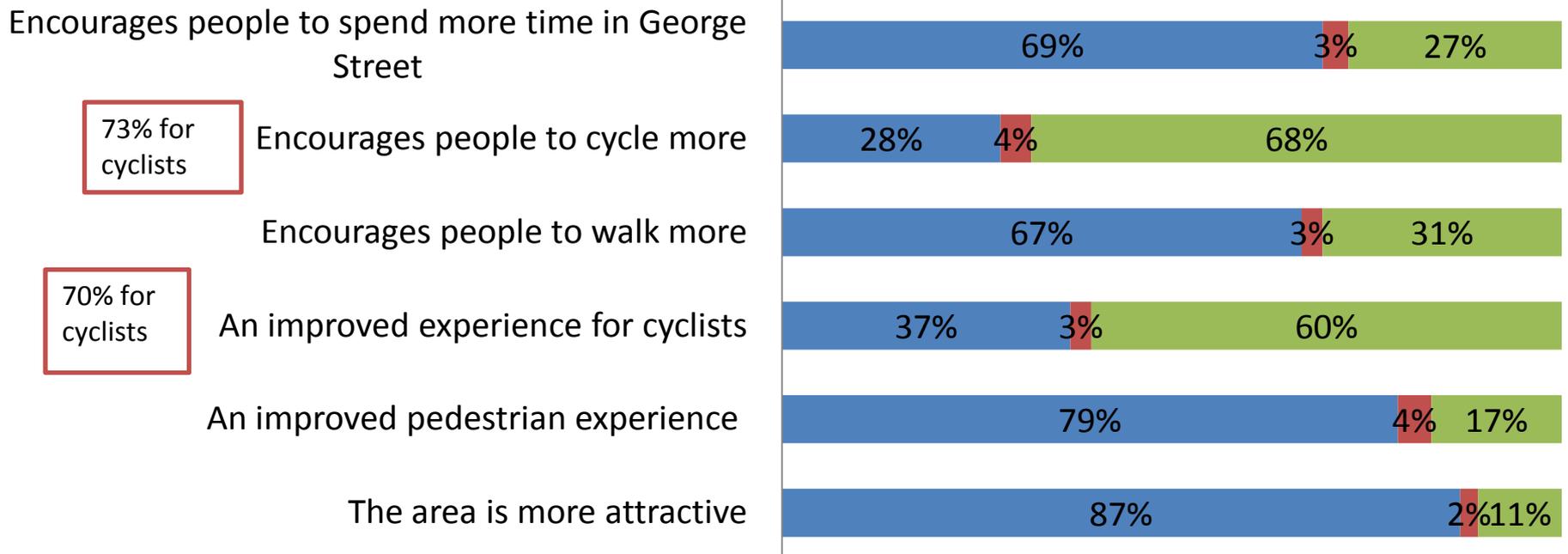
Not enough parking - makes journey longer and more stressful.

Traffic disruptions.

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

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

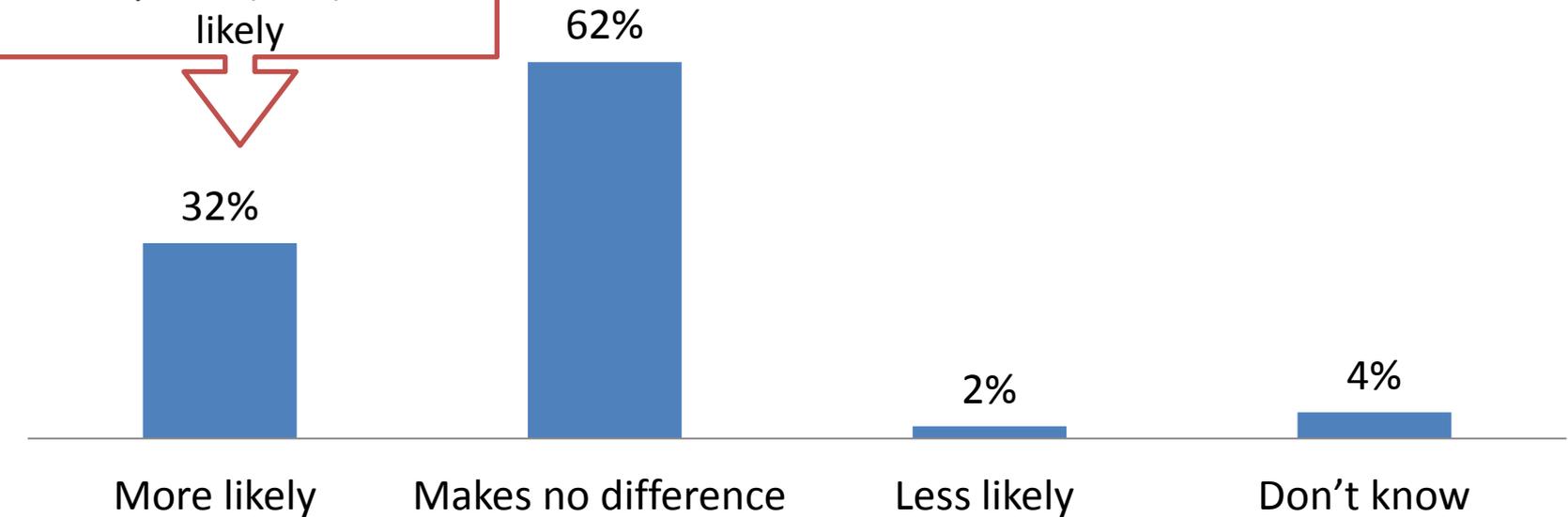
■ Yes ■ No ■ Don't know



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

**Q16 Do you think the changes to George Street make you more or less likely to visit or does it make no difference?**

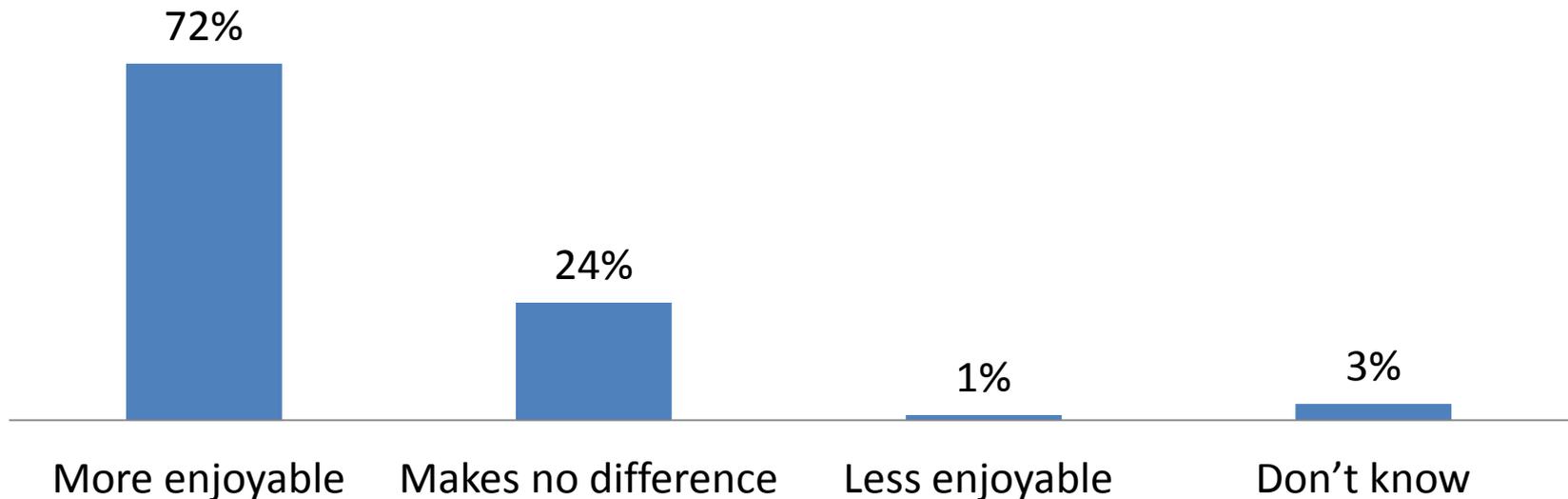
New town (46%) and Edinburgh (44%) residents and cyclists (55%) most likely



Base: Respondents Sept-Nov 14, n=300

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

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



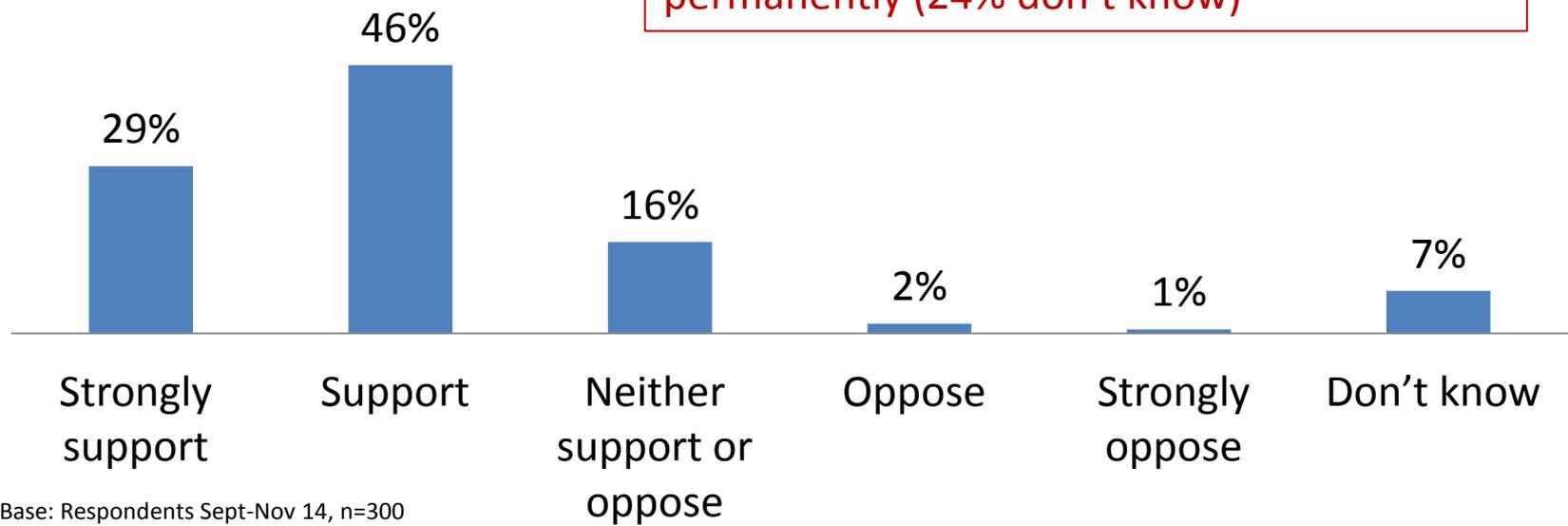
Base: Respondents Sept-Nov 14, n=300

# The future of George Street

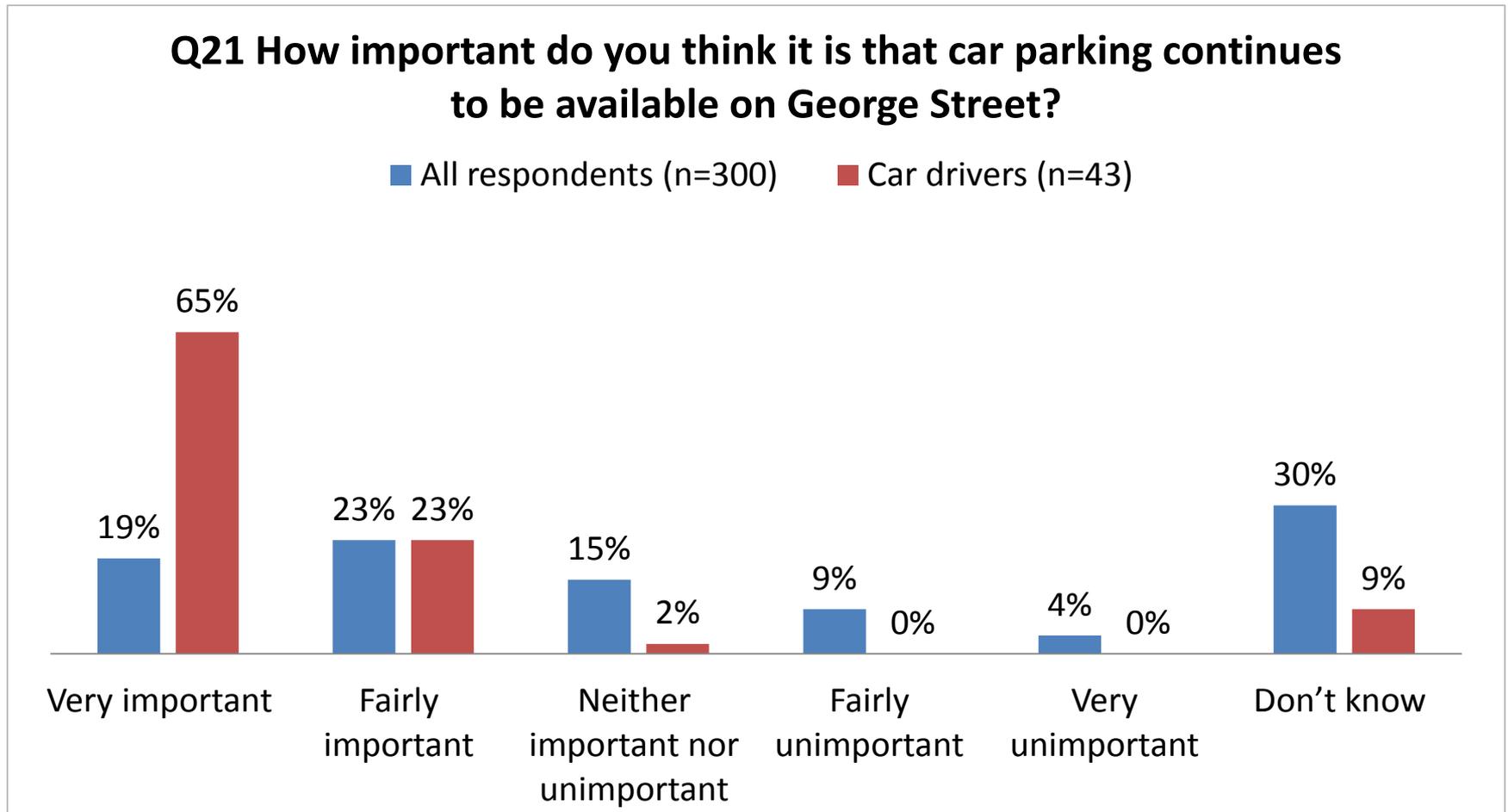
# Three quarters of respondents support the idea of pedestrianized spaces

**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?**

65% believe that these should be available permanently (24% don't know)



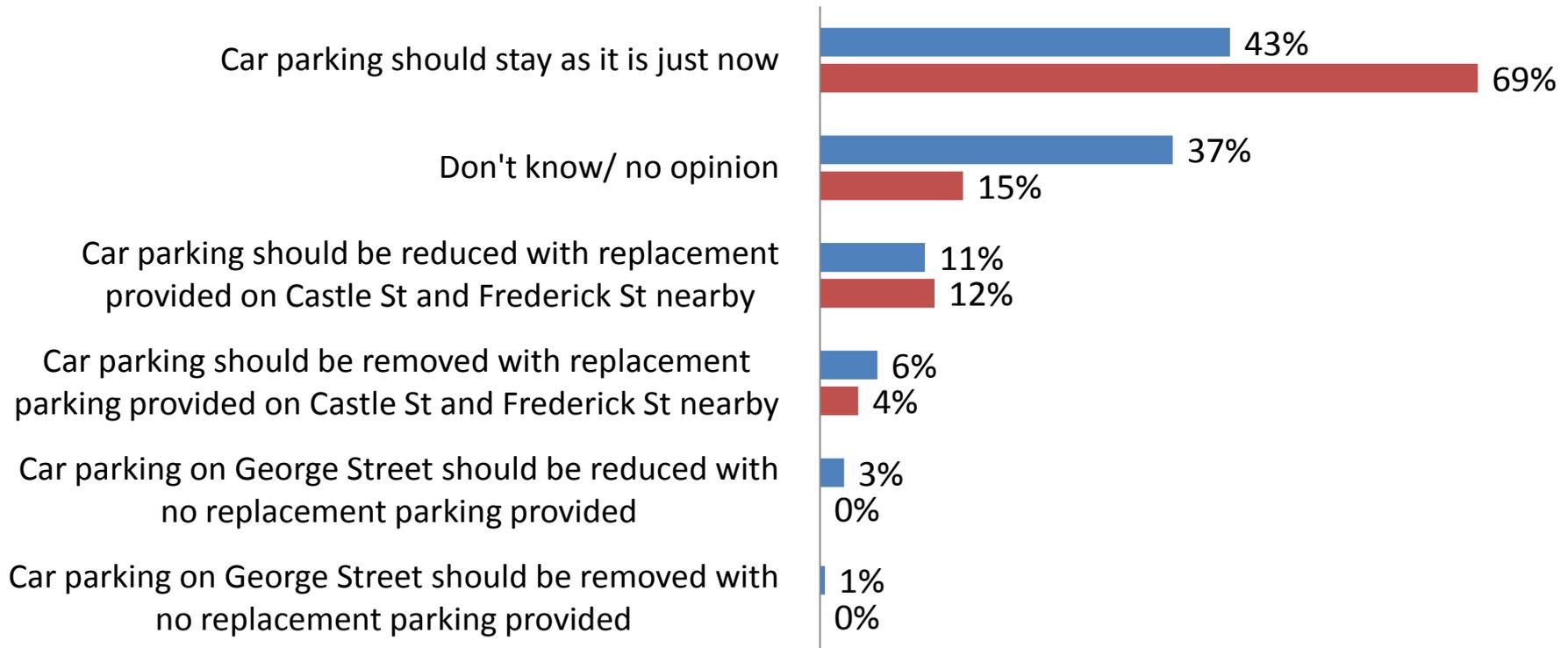
# Car drivers much more likely to feel it is important that car parking continues to be available on George Street



# Car drivers preference is that parking remains as it is

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

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



# Suggestions for improvement

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

Make changes permanent/ maintain the changes (30%)

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

Ban cars altogether/ pedestrian area only (13%)

More/ affordable parking (12%)

Keep clean/ clear up litter (10%)

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

More seating areas (3%)

More cafes selling coffee/ cakes (5%)

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

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

Any questions?

## **Briefing Note & Minutes**

George Street Pedestrianisation Trail : First Quarterly Research Results (300 interviews) and feedback from quarterly stakeholder meeting (attended by businesses, members of the public, Elected Members, transport groups, heritage bodies and other interest groups).

### **Background & Different roles for CEC & Essential Edinburgh within the trial**

The Council is running a year-long trial on George Street, introducing a two-way cycle lane, more space for pedestrians and a one-way traffic management system. 91% of the car parking was retained, including all types of parking on each block, and the purpose of the trial was to increase footfall, improve the pedestrian experience, and to increase the amount of time people linger on the street and the number of times they would return to the street.

Aside from the Council's role in opening up the space, Essential Edinburgh secured a planning consent for marquees and decking with the aim of animating the space, in a temporary manner.

The Council procured and appointed Research Resource, a leading independent research firm, to undertake 1200 on-street surveys, 100 per month, including minimum quotas of cyclists, New Town residents and car drivers.

A reasonable conclusion from quarter one is the Council's aspects of the trial have been successful in achieving greater footfall on all four blocks, people are lingering longer & returning frequently to the street. However the restaurants' marquees are almost universally seen as having failed on account of (i) their appearance is not in-keeping with George Street (ii) they are too permanent – they could not be removed for a major civic event like Light Night, for example (iii) they 'box in the buzz', and animate a private space that fails to bring atmosphere to the wider street. The Council is not seeking to provide private commercial boxes on civic space. There are other ways of animating a civic space that still allows for civic use of civic space on demand, yet bringing life to the street year-round.

### **Research Results**

Research Resource reported on the first 300 on-street interviews. Full results are attached as an appendix. The key findings were as follows. 3 months in and George Street has:

- More people than ever before are on George Street : footfall has increased
- People are lingering longer, spending around 3 hours on average when visiting the street
- People are returning at the same or greater frequency than before (33% visit more often now it's pedestrianised, 62% same as before)
- These three facts show that Council's objective of making the space more attractive to visit (and encouraging returning visitors) is working. People like the space that's been created.

For Businesses:

- Window shopping is top of the list of "reasons for your visit". Shopping comes fourth.
- The Council's project is putting more eyeballs in front of shop windows than ever before, but only half are being converted into shoppers.
- Reasons for this may include "showrooming" where customers browse in shop, see the product, but then find a better deal online.

- Commentators like Martin Lewis argue that recent consumer rights legislation has created an imbalance, with 14 day no-questions-asked returns allowed for online purchases, but no similar arrangement exists for in-store purchases. The more clued-up consumer (perhaps the typical George Street consumer) is perhaps shopping online this year, especially for clothing.
- There are also some patterns visible across the UK macro economy where budget retailers (e.g. Primark) are performing better than higher end retailers (e.g. those George Street).
- The Council will be looking to work with businesses to improve the environment (there is often trade waste left outside premises all day, which is off putting to customers, whose customer experience has already begun by the time they pass branded trade waste bags outside a premises) & we'll be introducing some free-to-access public seating on the street.
- All ideas and discussions for animation of the space are welcomed by the Council, and any correspondence on ideas can be directed to [jain.macphail@edinburgh.gov.uk](mailto:jain.macphail@edinburgh.gov.uk)
- The fact there are more people on the street, lingering longer & returning frequently is a strong position to build upon in 2015.

From local people & those interested in the world heritage site:

- There is broad support for the concept of pedestrianising the space and introducing more animation, but the execution of these two concepts could improve. Two key criticisms are:
- (1) the long-run design must return to a pleasing symmetry (it is currently asymmetrical) and an independent designer will be contracted to work up four potential options for the long run layout of the street, reporting in late 2015. We are confident this will address the matter and produce a design with symmetry through the design options process.
- (2) bar/restaurants' decking and marquees, an inflexible commercial use of civic space.
- We are working with Essential Edinburgh to encourage the removal of decking and marquees from their members before the trial ends, with alternative approaches encouraged which animate the civic space, but with a non-permanent removable structure. One example of an alternative are the "Jumbrellas" recently installed on Rutland Street, where these umbrellas have an electricity supply, provide weather protection and heating for customers, but bring buzz to the surrounding street (not a boxed-in buzz) and they can be removed at short notice for civic events, retaining an identifiably civic use of civic space.

Traffic displacement and environmental health/air quality matters:

- Traffic is being monitored on George Street and surrounding streets, to track any traffic displacement that occurs. The Council is meeting monthly with the New Town & Broughton Community Council, as well as with some interested members of the public, to provide feedback. This work will be ongoing, but early findings are that traffic levels have decreased significantly since 2005 on York Place (down 25% on 2005 levels) meaning there are more people in the city centre but fewer cars in town than before. The traffic levels on parallel street such as Abercromby Place and Albany Street have not grown perceptibly in the first few months, with perhaps between 4 and 6 additional vehicles per hour (one every 10 mins).

- Air Quality – one of the key reasons for undertaking a one-way traffic system, and introducing more pedestrian space and cycle lanes, was because George Street has recorded a dangerous level of air pollution in recent years due to the high volumes of traffic that previously used it. Air quality levels are improving and will be reported in full at the conclusion of the trial (Sept 2015).

#### Successes:

- European recognition for how pretty the Made In Edinburgh planters have been...Edinburgh took gold at the Entente Florale, and George Street played a part in that.
- People asked the Council not to use metal mills barriers so the Council asked our craftsmen and apprentices at the Inch Nursery to create bespoke wrought iron planters to act as a visible barrier between the car parking and cycling/pedestrian spaces, as a safety measure.
- The trial has been delivered on time, on budget, and as all the materials are recyclable and have a resale value the project may end up very close to cost neutral.
- The greatest success to date though is that footfall is up, more people are spending a longer time on George Street, and are returning frequently for more, as they like the new space.

#### Details from the research

- 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
- 300 interviews carried out between September and November 2014
- 74% of respondents think George Street's appearance has improved through the trial
- 72% said their visit was more enjoyable as a result of the changes
- 75% support the idea of pedestrianised spaces
- Specific pages to draw to your attention on the attached comprehensive data:
- Reasons for visiting George St (p7)
- How long visitors stay on George St/why (p8)
- What is important when making a decision about coming to George St (p11)
- Reasons for perception of improvement (p25)

#### Feedback from the Quarterly Stakeholder Meeting

As is often the case with a trial project, a lot of the research findings challenged long-held existing assumptions and preconceived ideas, amongst the local business community and local residents and Council officials.

The strongly expressed feedback from the stakeholder group was that there are negative perceptions of the trial, locally, and in discussion it emerged quite clearly that these are almost exclusively about the appearance of Essential Edinburgh members' decking and marquees. The group would like to see these removed as they negatively impact on the perception of the street.

The project would support that outcome too, at this stage, as the project's aim was to animate the space, to improve footfall, to encourage that greater footfall to linger longer and visit more often. While all of these outcomes are being achieved, at this stage, there are better ways than a marquee of animating a space in a temporary manner, but that allows for civic events to take place on civic space, bringing animation to the civic space, and not just to an enclosed private box.

Separate from the research process, the Council is beginning the process to procure a designer who will lead a design options process, involving key stakeholders and a panel of experts. This group will undertake a 'pros & cons' SWOT analysis of four different designs for the street layout being

- (i) the previous layout of George Street
- (ii) the current layout of George Street
- (iii) a fully pedestrianised George Street and
- (iv) a layout that is between (ii) & (iii), informed by Designing Streets & key design principles.

The work of the design team will be presented to Transport and Environment Committee at the conclusion of the trial. The stakeholder group will be informed of progress from the design discussions on a quarterly basis, in a similar manner to the quarterly research updates they receive.

Perhaps the key consideration for the George Street trial, this stakeholder group, and the design process, is to work towards a vision of what kind of place George Street should become, in advance of the St James development completing in 2019/2020. The empirical research feedback is already challenging notions and ideas of how customers and citizens use George Street, how people perceive it, and what they would like it to become. A clear majority of the interviewees at this stage support greater pedestrianisation of the street, raising fundamental questions for the project to consider during the remainder of the trial period on what type of place is George Street - is it a retail street, a party street, or a residential space, a cultural attraction for tourists, is it even "one street" in terms of uses (i.e. do individual blocks have different characters from neighbouring blocks).

It is clear from the research that the design options will wrestle with directly competing groups, e.g. 12% saying they want more car parking, and a similar number (13%) saying get rid of all car parking.

The stakeholder group also raised important questions about financing any public realm improvements (the concern being that whatever the outcome is the Council needs to get it right and it may be a costly exercise). The key feedback though was a request for the removal of marquees.

The group accepted that the purpose of a Council in a pedestrianisation project is to create a space that encourages greater footfall, that lingers longer and returns more frequently. The trial can evidence that it has been successful in all those regards so far. At next meeting the questionnaire and any photographs being shown to interviewees will be brought to the meeting to see.

There may be food for thought for business groups within the information that 38% of people on George Street are window shopping (perhaps showrooming) but only 20% are actually shopping. Business groups may wish to use this information to:

- (1) lobby central government about the impact of an imbalance in consumer rights (online vs in-store purchases carry radically different levels of protection for consumers);
- (2) consider ways to convert the increased footfall and 'showrooming' at their windows into shoppers coming in-store to make a purchase there and then;
- (3) engage with Council over ideas for ways to animate the space in the street;
- (4) consider that, in the newly pedestrianised spaces, the customer experience begins before the customer reaches the shop window. There are daily examples to be found of retailers leaving trade waste (clearly identifiable to their business) out on the street. The same staff member who took the rubbish out is then polishing the windows and door handles, but the customer's negative perception will have begun at the point of seeing the trade waste. There are more discreet ways that trade waste can be stored and removed.
- (5) The Council is keen to engage more directly with individual businesses on the street, to provide an equally-informed view that would sit alongside the monthly feedback from the local community council and the 1200 on-street customer/citizen interviews being captured.

Closing remarks:

There was a lot of passion expressed in the meeting and understandable concern that, within the context of a low-budget trial, the look of the street could improve. The benefit of a trial approach is that we are not stuck forever with any aspects that have not worked, while we can retain the aspects that do succeed. We have an unprecedented opportunity to learn (through empirical research) how people move around the city centre, and what their thoughts and opinions are on how people use George Street, for shopping, dining, socialising, working, living, travelling and visiting.

The George Street area is fortunate to play home to some of the finest architects, designers and heritage expertise in the country, some of the finest business brains in the country, and has the benefit of a highly motivated local community who care deeply for the World Heritage Site and want to see the street become the best it can be. It is the Council's role to ensure that this passion and expertise (allied to the empirical research work) produces the best long-term outcome for the street in what is a very dynamic city centre environment.

The input of all attendees and contributors was all noted and gratefully received.

At the next meeting, the results of interviews from December, January and February will be released, and it will be interesting to see if the early successes are maintained through the winter months (higher footfall, lingering longer, returning frequently, positive about pedestrianised areas). Also with the Christmas shopping period in there, and the annual Hogmanay festivities, the retail and tourism angles will undoubtedly be of interest for members of this Stakeholder Group.

Many thanks for your involvement.

Date of Next Meeting: Week commencing 16<sup>th</sup> March 2015 (date & time tbc) in Assembly Rooms.

Iain MacPhail

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City Centre Programme Manager

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