



Dunfermline Delivers
City Centre User Visitor Survey (September 2013)

Overview

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Summary of Findings

Introduction

As part of its ongoing evaluation, Dunfermline Delivers undertook a survey of city centre visitors in September 2013. This survey sought to gain an understanding of who visits Dunfermline city centre and why, as well as elicit views on the city centre.

The survey took the form of face to face, on street interviews. Interviewing was carried out – at varied locations and times in Dunfermline City Centre. Some 96 completed survey questionnaires form the basis of the analysis, although not all respondents completed every question. Generally a minimum of 100 survey returns is regarded as providing a reasonable sample size to give representative results, although 200 would be more robust.

Where appropriate the results of the 2013 city centre visitor survey are compared to an earlier town centre perception survey undertaken by Fife Council in 2007. However, the questions asked are different and hence the two surveys are not directly comparable.

Reasons for Visiting Dunfermline City Centre

The key reasons for visiting Dunfermline city centre were eating out and shopping, cited by 53% and 37% respectively – based on all respondents who answered this question. Other reasons for visiting generated much lower responses but included to visit the theatre, or local attractions or for work purposes. These findings are not surprising but it is worth noting that eating out is cited by more than half of all respondents and this is perhaps indicative of the evolving role of city centres away from being primarily retail centres. The 2013 survey results are quite different from those in 2007 where 47% of respondents were in Dunfermline for shopping and 23% for work purposes and eating out was not even identified as a separate category.

Only a third of survey respondents chose to share which specific outlets they had visited in Dunfermline city centre but of these Grill 48 accounted for half of the responses – this of course may reflect the location and/or timing of interviews.

Who Visits Dunfermline City Centre?

A wide range of age groups took part in the survey with those aged 31-49 accounting for around one third of respondents (33%) and those aged 50-69 accounting for 30% and under 30s accounting for 28%. The age bandings in the previous survey do not correlate to those in this current survey.

Not all respondents chose to provide their address details but of those that did 36% were from Dunfermline, another 36% from elsewhere in Fife and 28% from outside of Fife including from Edinburgh, Glasgow, Dundee, Alloa and Livingstone. This information was not collected in the previous survey.

Some 31% of survey respondents answering this question were visiting Dunfermline by themselves but 44% were with one other person and a quarter (25%) were accompanied by two or more people. Family groups accounted for a third of those surveyed.

Travelling to Dunfermline City Centre

Most survey respondents answering this question travelled to Dunfermline city centre by car (68%) but 23% used the bus and 14% walked. This is quite different from the 2007 survey where half of

respondents travelled by bus and only 31% by car, meaning that Dunfermline was considered as the least car dependent town centre in Fife at that time.

Frequency and Length of Visits to Dunfermline City Centre

Some 41% of all survey respondents answering this question indicated that they visited Dunfermline city centre more than once a week, with another 22% indicating they visited weekly. This is less than in 2007 when 71% of respondents indicated they visited Dunfermline city centre at least once a week. Around 21% of survey respondents visited Dunfermline city centre once a month and only 3% were first time visitors.

The majority of survey respondents (58%) indicated they were spending 2-3 hours in Dunfermline city centre that day, with another 31% spending 4 hours or more and only 11% indicating they would be there for less than one hour. Compared to the 2007 survey, more respondents are compressed into a 2-3 hour stay, with fewer staying for longer or shorter times. When asked how long they would typically spend in Dunfermline city centre, 67% of 2013 survey respondents answering this question indicated 2-3 hours on average, with 20% indicating less than one hour and 14% more than four hours.

When asked if their visits to Dunfermline city centre had increased over the last 1-2 years, there was an even split of one third saying they had, one third saying they had not and one third saying their level of visits had stayed the same. Those respondents that had increased their visits to Dunfermline city centre were most likely to be visiting on the survey day to shop (78%), eat out (48%) and/or go to pubs/clubs (37%).

Enjoyment and Views on Dunfermline City Centre

Whilst a minority did not respond to the question asking if they had enjoyed their visit to Dunfermline, encouragingly 100% of those who did respond confirmed they had.

When asked whether they thought Dunfermline was clean and attractive, the vast majority (82%) who responded to this question considered it was. This appears to be a considerable improvement on 2007, when 47% of survey respondents rated the cleanliness of Dunfermline as poor or very poor.

When asked whether they thought Dunfermline city centre was friendly and easy to navigate/get around, the vast majority (95%) who responded to this question considered it was.

When asked if they generally felt safe in Dunfermline city centre during the day, the vast majority (93%) who responded to this question considered they did.

Fewer people responded to the question asking if they generally felt safe in Dunfermline city centre in the evening, possibly reflecting that they did not visit in the evening. However, it is clear that survey respondents felt less safe in the evening than during the day, with two thirds of those answering this question indicating they felt safe but one third indicating they did not.

Only around two thirds of survey respondents overall answered the question related to late night public transport, again perhaps reflecting their lack of experience of using it. Just under two thirds of these respondents (63%) considered late night public transport provision was insufficient but well over a third thought existing provision was sufficient.

Likes and Dislikes of Dunfermline City Centre

Respondents were asked to give additional comments about things that they liked and/or disliked about Dunfermline city centre and the majority took the opportunity to do so, often including more than one element within their comments. Overall the number of comments related to likes was around the same as those related to dislikes.

Respondents liked a variety of things about Dunfermline city centre but its history and heritage and The Glen/parks were the most frequently mentioned. For ease of analysis likes have been grouped together as far as possible. In descending order, the top things survey respondents liked about Dunfermline were

- Its history, heritage, built heritage and visitor attractions
- The Glen and other parks.
- City centre shopping/the good variety of shops
- Parking, ease of access, vehicle friendly
- It is tidy, clean and friendly

Respondents disliked a variety of things about Dunfermline city centre but the overriding dislike was the lack of variety and choice of shops and that there were too many cheap shops. Again for ease of analysis comments have been grouped together, as far as possible, and in descending order the top things survey respondents disliked about Dunfermline were

- Lack of retail variety and choice and too many cheap shops
- City centre run down, needs improvement, etc
- Too many charity shops
- Too many drunks, drug addicts, homeless, etc
- No soul, no life, etc
- Lack of entertainment, lack of things to do in the evening
- Not enough/choice of restaurants

What Improvements Would People Like to See?

Again there were a wide variety of comments about what would improve Dunfermline city centre, with the most frequently mentioned aspect relating to more shops, greater variety, better quality shops, and fewer empty premises.

For ease of analysis suggestions have been grouped together as far as possible and include

- More shops, more variety, better quality shops, fewer empty premises
- Improving the environment of the city centre or aspects of it
- More to do, more late night opening, more markets, etc
- Better and/or cheaper parking
- Various access considerations, bus fares etc
- Too many cars in the High Street, more pedestrianisation needed
- Make more of the historic assets
- More designated smoking areas and more bins
- More seats and benches

In general terms the above suggestions are not dissimilar to those made in the 2007 survey.

Summary of Visitor Survey

The 2013 city centre visitor survey found that visits were most likely to be made for eating out or for shopping and that visitors were typically in a party of two or by themselves, and a third were visiting

with family members. Around two thirds of city centre visitors travelled by car, with visitors split not quite equally as from Dunfermline, from the rest of Fife or from outside of Fife. Visits typically lasted 2-3 hours and around 63% visited Dunfermline city centre weekly or more frequently, with a third of respondents saying they had visited more frequently over the past 1-2 years. However, there were few first time visitors.

The responses were very positive in terms of overall visitor enjoyment, and aspects such as the cleanliness, attractiveness, friendliness, easy of getting around and safety were all rated highly by visitors. This is perhaps indicative that the activities of Dunfermline Delivers have had a positive impact on the city centre. Evening safety was less positive, with a third of respondents who answered this question indicating they did not feel safe at night and also almost two thirds saying that late night transport was insufficient.

Survey respondents had a wide variety of likes and dislikes but the key likes were the history and heritage and The Glen and other parks, whilst the key dislike was the lack of variety and choice of shops and that there were too many cheap shops.

When asked how Dunfermline city centre could be improved, the most frequently mentioned aspect by far was by improving the variety, choice and quality of the shopping experience.

Compared to the 2007 town centre perception survey, visitors were more likely to be eating out than shopping although shopping remains popular. They were more likely to have travelled by car and were probably visiting Dunfermline city centre slightly less frequently. The views expressed in the 2013 survey seem generally more positive about Dunfermline city centre although few questions are directly comparable and the suggestions for improvements still broadly reflect the findings of the 2007 survey.