

Report

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The Royal Parks In-Park Research Report 2006 All Parks Combined and Executive Summary



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1. INTRODUCTION AND METHODOLOGY

1.1 Introduction

The Royal Parks wished to put in place a significantly enhanced Visitor Research Programme, starting in 2004, to contribute towards achieving its Business Objectives, as well as guiding future strategies and Park programmes.

The Business Objectives can be summarised as follows:

- To improve the quality and range of visitor services;
- To protect, conserve and enhance the environment of the Parks;
- To develop policies and initiatives to encourage wider use of the Parks;
- To raise the profile, understanding and value of the Parks;
- To manage the Parks efficiently and effectively.

1.2 Research Objectives

There are a number of objectives, divided into three tiers of importance:

Primary Objectives

1. To continue measuring against Government KPI targets, as well as establishing new improved measures and indicators, and benchmarks for them;
2. To gain an understanding of the decision process that visitors go through when considering visiting the Parks, and how visitors can be influenced to visit the Parks;
3. To investigate barriers to Park use and how non- and infrequent users can be encouraged to visit the Parks;
4. To segment and characterise users, infrequent users and non-users;

5. To provide robust visitor count data, including the number of overseas visitors;

Secondary Objectives

6. To determine the effect of weather and season on Park use and perceptions;
7. To investigate which facilities and services visitors expect or would like that are not currently offered;

Tertiary Objectives

8. To benchmark The Royal Parks against other (Metropolitan) Parks and attractions (esp. free ones);
9. To gain feedback on major planned projects;
10. To investigate and, if possible, quantify the contribution of the Parks to the quality of life in the capital.

This report details Synovate's findings and recommendations from the 2006 In-Park Visitor Surveys in the context of comparison to the results from the 2004 and 2005 In-Park Visitor Surveys.

1.3 Methodology

Fieldwork was undertaken in 2004 and 2005 as follows:

	2004	2005	2006
Exploratory Qualitative research	<i>Greenwich, Bushy, St. James's & Green Park</i>	<i>Hyde, Regent's, Primrose, Richmond & Kensington Gardens</i>	<i>Greenwich, Bushy, St. James's & Green Park, Hyde, Regent's, Primrose, Richmond & Kensington Gardens</i>
In-Park Visitor Survey	<i>As above</i>	<i>As above</i>	<i>As above</i>
Telephone User Survey	<i>As above</i>	<i>As above</i>	<i>None</i>
Telephone Non-User Survey	<i>As above</i>	<i>As above</i>	<i>None</i>

1.3.1 In-Park Visitor Survey:

- Visitors were interviewed as they left the Parks.
- Survey took place in Summer (July and early August) and Autumn (late September to mid October) in 2004, 2005 and 2006.
- 'Next available respondent' recruitment technique used.
- Survey was paper-based, with interviewer reading out questions.
- Interview lasted about 10 minutes.
- Interviews took place at various times on weekdays, and weekends.
- Interviewers rotated around different Park exits.
- In 2004 and 2005, approximately 200 interviews were conducted in each of the 4 Parks in Summer, and approximately 140 at each in Autumn.

All interviewing was conducted by IQCS trained interviewers. Synovate UK is a MRQSA registered company and therefore has formal quality procedures in place covering all elements of this study.

2. EXECUTIVE SUMMARY

This Executive Summary summarises results from the Total Parks report (section 3), as well as drawing from the individual Park reports for each of the nine Parks.

Please note that where an increase or decrease is referred to as being 'significant, this means that it is statistically significant at the 95% confidence level.

2.1 Key Findings

Overall Ratings of Parks

All nine Parks are rated very highly on the overall rating in 2006, as was the case in 2004/2005, with the exception of Primrose Hill. With the exception of Primrose Hill, 87% of visitors or more rate each Park as either 'excellent' or 'good' on a five-point scale from 'excellent' to 'very poor'.

Sixty per cent of all visitors across all Parks (on average) rate their Park as 'excellent', identical to the proportion in 2004/2005. Moreover the proportion giving a rating of good is almost identical also (36% in 2006, 35% in 2004/2005). However, the proportion of visitors giving an 'excellent' rating differs considerably between the Parks. The Park rated highest is Richmond (77% 'excellent' rating), which has a considerably higher rating than all other Parks. The next highest ratings are for Regent's and Greenwich (both 66%), St James's and Kensington (both 65%) and Bushy (64%).

Two of the three lowest scoring Parks in 2006 are the same as in 2004/2005, namely Hyde (40%) and Green (54%). But the lowest scoring Park is Primrose Hill (24%).

One Park saw a significant increase in the 'excellent' rating, namely Bushy, from 55% in 2004/2005 to 64% in 2006.

Conversely, Regent's Park saw a decrease in the 'excellent' rating from 75% in 2004/2005 to 66% in 2006.

Primrose Hill experienced a very large decrease in the top box rating, from 63% in 2004/2005 to 24% in 2006. There are two principal sub-groups that

are instrumental in this decline in Primrose Hill: (i). visitors who visit 5-10 times a year, and (ii). visitors who stayed for more than 2 hours at the Park. A much larger proportion of these was interviewed in 2006 than 2005.

KPI Performance Ratings

In 2006, as in 2004/2005, the Parks score highly on aspects relating to the *Park Environment* and 'ease of access' and 'ease of getting around the Park', but achieve lower scores in respect of aspects relating to both *Information and Staff, Catering, Toilets, Other Facilities* and 'car parking facilities'.

Very encouragingly, across all Parks combined, in 2006 the Parks received significantly higher ratings across all aspects of *Park Environment, Information and Staff, Catering, Toilets, Other Facilities* and *Ease of Getting Around*, compared to 2004/2005.

The table overleaf shows which Parks are rated higher, which are rated lower and which no different (statistically speaking) compared to the ratings given in the previous survey (either 2004 or 2005, depending on the Park). For the most part, this table explains to a considerable extent each of the Parks' overall quality rating mentioned in the 'Overall Ratings of Parks' section above.

Encouragingly, it can be seen that for most aspects (14 out of 19), most Parks have seen an increase in the proportion of respondents giving an 'excellent' rating.

Those aspects for which the *largest* number of Parks received significant increases in ratings are:

- Information on Park features (all 9 Parks)
- Quality of catering facilities (all 9 Parks)
- Children's facilities (7 out of 9 Parks)
- Signposting and maps (7 out of 9 Parks)
- Visibility and friendliness of staff (7 out of 9 Parks)

Those aspects for which the *smallest* number of Parks received significant increases in ratings (for those aspects asked about all Parks in 2004/2005) are:

- Ease of access (3 out of 9 Parks)
- Quality of sports facilities (3 out of 9 Parks)
- Upkeep of Park (4 out of 9 Parks)
- Seating (4 out of 9 Parks)

Of all the Parks, the Parks with the most significant increases in scores between 2004/2005 and 2006 are:

- Hyde: 15 out of 19 aspects
- Bushy: 13 out of 19 aspects
- Green: 12 out of 19 aspects
- St James's: 12 out of 19 aspects

In terms of the Parks receiving significantly lower ratings for aspects in 2006, consistent with the overall Park rating, Primrose experienced the most significant decreases, namely on seven aspects. Notably, two of these were on Park Environment aspects: 'quality of natural environment' and 'upkeep of the Park'.

The other two Parks to have received significantly lower scores are Regent's for 'ease of access' and Greenwich for 'tidiness and cleanliness'.

Aspects (in order proportion rating as 'excellent' in 2004/2005)	Park(s) rated significantly higher than in 2004/2005	Park(s) rated no different than in 2004/2005	Park(s) rated significantly lower than in 2004/2005
Quality of natural environment ¹	All Parks combined, Kensington, Richmond	Hyde, Regent's	Primrose
Upkeep of Park	All Parks combined, Bushy, Kensington, Richmond	Green, Greenwich, St. James's, Hyde, Regent's	Primrose
Ease of access	All Parks combined, St. James's, Richmond	Bushy, Green, Greenwich, Hyde, Kensington	Primrose, Regent's
Ease of getting around Park	All Parks combined, Bushy, Green, Greenwich, St. James's, Hyde, Richmond	Kensington, Primrose, Regent's	
Tidiness and cleanliness	All Parks combined, Bushy, Green, St. James's, Kensington, Primrose, Richmond	Hyde, Regent's	Greenwich
Peace and quiet	All Parks combined, Bushy, Green, St. James's, Hyde, Kensington, Richmond	Greenwich, Primrose, Regent's	
Children's facilities	All Parks combined, Bushy, Greenwich, St. James's, Hyde, Primrose, Regent's, Richmond	Green, Kensington	
Seating	All Parks combined, Green, Hyde, Kensington	Bushy, Greenwich, St. James's, Regent's,	Primrose

1 Only included in 2005 survey. Therefore Bushy, Green, Greenwich and St James's were not rated in 2004 and so no comparison can be made.

		Richmond	
Car parking facilities ¹	All Parks combined, Hyde, Richmond	Kensington, Regent's	Primrose
Information on Park features	All Parks combined, Bushy, Green, Greenwich, St. James's, Hyde, Kensington, Primrose, Regent's, Richmond		
Signposting and maps	All Parks combined, Bushy, Green, St. James's, Hyde, Kensington, Primrose, Regent's	Greenwich, Richmond	
Adult's activities	All Parks combined, Green, Bushy, Greenwich, Hyde, Regent's	St. James's, Kensington, Primrose, Richmond	
Visibility and friendliness of staff	All Parks combined, Bushy, Green, Greenwich, St. James's, Hyde, Kensington, Regent's	Richmond	Primrose
Quality of toilets	All Parks combined, Green, St. James's, Hyde, Primrose, Regent's	Bushy, Greenwich, Kensington, Richmond	
Quality of catering facilities	All Parks combined, Bushy, Green, Greenwich, St. James's, Hyde, Kensington, Primrose, Regent's, Richmond		
Quality of sports facilities	All Parks combined, Greenwich, Hyde	Bushy, Green, St. James's, Kensington, Regent's, Richmond	Primrose
Number of sports facilities	All Parks combined, Bushy, Greenwich, St. James's, Hyde, Kensington	Green, Primrose, Regent's, Richmond	
Number of catering	All Parks combined, Bushy, Green, Greenwich, St.		

facilities	James's, Hyde, Kensington, Primrose, Regent's, Richmond		
Number of toilets	All Parks combined, Bushy, Green, Greenwich, Hyde	St. James's, Kensington, Primrose, Regent's, Richmond	

Key Action Areas

Strategy matrices have been produced by plotting KPI importance on one axis and KPI derived² performance on the other, using data from the **In-Park Visitors Survey**. Key Action Areas are identified by scoring high on importance and low on performance (i.e. they fall in the top left quadrant of the matrix).

The table below overleaf shows the Key Action Areas - listed in priority order - for each of the Parks and the average across all nine Parks.

Overall across all Parks	Bushy Park	Green Park	Greenwich Park	St. James's Park	Hyde Park	Kensington Gardens	Primrose Hill	Regent's Park	Richmond Park
No aspects	Activities for adults	No aspects	Activities for adults	Visibility and friendliness of staff	Quality of sports facilities	Car parking facilities	No aspects	No aspects	Facilities for children
	Information on features		Signposting and maps	Facilities for children		Quality of sports facilities			Signposting and maps
	Signposting and maps		Number of sports facilities	Number of toilets					Number of catering facilities
			Quality of sports facilities						

² "Derived importance" has been calculated by running correlations between individual performance elements and the overall quality rating.

It can be seen that the Key Action Areas differ considerably across the Parks, with some Parks (Green, Primrose and Regent's) not having any Key Action Areas. Moreover, across all of the Parks combined there are none, but it is obviously important to look at these at an individual Park level.

Each of the aspects feature once or twice across all Parks, implying that there is not one specific issue that is a high priority for all Parks.

In terms of the highest priorities across all of the Parks, by looking at the position of the aspects for each Park on the matrices and their proximity to the top-left hand corner, the highest priorities across the Parks appear to be:

- Car parking facilities at Kensington Gardens
- Activities for adults at Greenwich Park
- Facilities for children at Richmond
- Visibility and friendliness of staff at St. James's Park.

There are other areas that may merit improvement that fall outside (but close to) the top left quadrant.

Key Suggestions for Improving the Parks

In the **In-Park Visitors Survey**, on average across all Parks, there was no one significant aspect which visitors claimed would increase enjoyment of the Park.

The top four mentions, albeit by a very low proportion of visitors, were 'more/better/cleaner toilets' (named by 5%), 'more seating' (3%, significantly lower than in 2004/2005), 'improved catering facilities' (4%, significantly lower than in 2004/2005) and 'more/cheaper parking'.

There are few significant differences across Parks with respect to these aspects, with the exception of:

- 'Improved catering facilities' is mentioned more by visitors to Hyde.
- 'More/better/cleaner toilets', 'more seating' and 'generally clean up/clear rubbish' are mentioned more by visitors to Primrose.

- 'More/better/cleaner toilets' is mentioned more by visitors to Regent's.
- 'More/cheaper parking' at Greenwich.
- 'More/cheaper parking' and 'restrict cyclists speeding through the Park'.

Information, educational & cultural activities and events requested in The Royal Parks

In the **In-Park Visitors Survey**, a significant proportion of visitors do not want to see any events in 'their' Park in future (16%), whilst when shown a list of potential activities and events, the top mentions received are in respect of 'music events and concerts', named by 40%, followed by 'theatre/open air theatre' (30%), 'nature and wildlife events' (25%).

2.2 Conclusions and Recommendations

Park-wide Priority Areas

Park Environment ('Quality of the natural environment', 'tidiness and cleanliness', 'upkeep and peace and quiet') is of paramount importance across all Parks and therefore it is important that the emphasis on these aspects is continued in order to maintain the high satisfaction scores.

Park-specific Priority Areas

With respect to specific Parks, two Parks scored poorer on overall quality in 2006 than 2004/2005. Key issues that need addressing at these Parks are as follows:

- **Primrose Hill:** 'Quality of the natural environment' 'upkeep of the Park', 'ease of access', 'seating', 'car parking facilities', 'visibility and friendliness of staff' and 'quality of sports facilities'.
- **Regent's:** 'Ease of access'.

In addition, there are a number of issues relevant to specific Parks as follows:

Activities for adults: This aspect is identified as a key priority for:

- Bushy

- Greenwich

Information on features: This aspect is identified as a key priority for:

- Bushy

Signposting and maps: This aspect is identified as a key priority for:

- Bushy
- Greenwich

Number of sports facilities: This aspect is identified as a key priority for:

- Greenwich

Quality of sports facilities: This aspect is identified as a key priority for:

- Greenwich
- Hyde
- Kensington

Visibility and friendliness of staff: This aspect is identified as a key priority for:

- St. James's

Facilities for children: This aspect is identified as a key priority for:

- St. James's
- Richmond

Number of toilets: This aspect is identified as a key priority for:

- St. James's

Car parking facilities: This aspect is identified as a key priority for:

- Kensington
- Primrose Hill

- Richmond

Quality of sports facilities: This aspect is identified as a key priority for:

- Kensington

Number of catering facilities: This aspect is identified as a key priority for:

- Richmond

Safety: This aspect is identified as a key priority for:

- Primrose
- Greenwich

Enhancements to the Parks

Music events & concerts: This aspect is identified by a significant proportion of visitors interviewed In-Parks as a possible facility that would enhance their enjoyment of:

- All Parks except Primrose Hill

Theatre/open-air theatre: This aspect is identified by a significant proportion of visitors interviewed In-Parks as a possible facility that would enhance their enjoyment of:

- All Parks except Primrose Hill

Nature and wildlife events: This aspect is identified by a significant proportion of visitors interviewed In-Parks as a possible facility that would enhance their enjoyment of:

- St. James's
- Hyde
- Bushy
- Green
- Richmond

Children’s entertainments and events: This aspect is identified by a significant proportion of visitors interviewed In-Parks as a possible facility that would enhance their enjoyment of:

- Bushy
- Greenwich

Guided walks and talks: This aspect is identified by a significant proportion of visitors interviewed In-Parks as a possible facility that would enhance their enjoyment of:

- Hyde
- Richmond

Historical events: This aspect is identified by a significant proportion of visitors interviewed In-Parks as a possible facility that would enhance their enjoyment of:

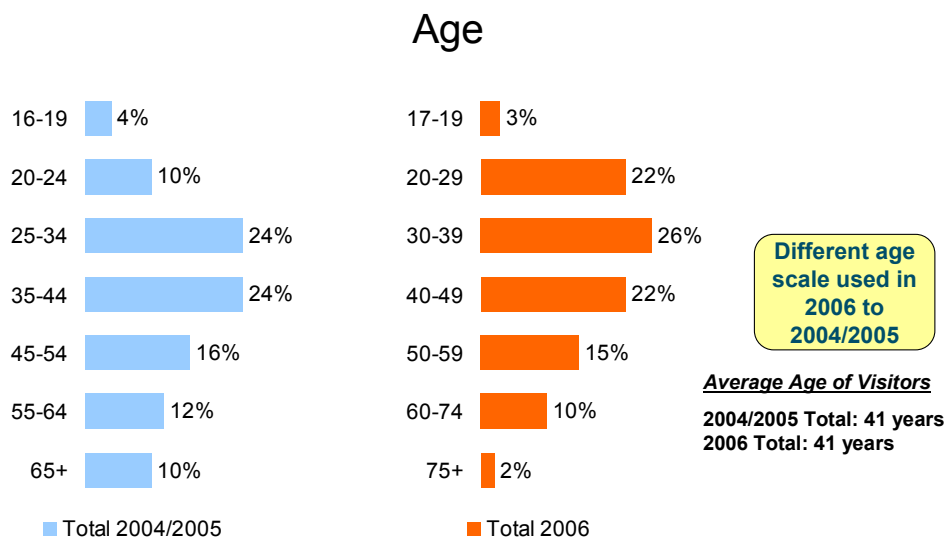
- Hyde
- Greenwich

3. IN-PARK VISITORS SURVEY – ALL PARKS

This section of the report provides the findings for all Parks in 2006 (summer and autumn combined), making comparisons to the findings from 2004 and 2005 combined, where relevant.

A green ring around a number signifies that the number in question is significantly higher at the 95% confidence level than the equivalent number for the other year being compared to. Given the large sample sizes (around 2800 in 2004/2005 and 3500 in 2006), in many cases only a small difference is needed (typically 3-4%) for it to be statistically significant.

3.1 Age Profile

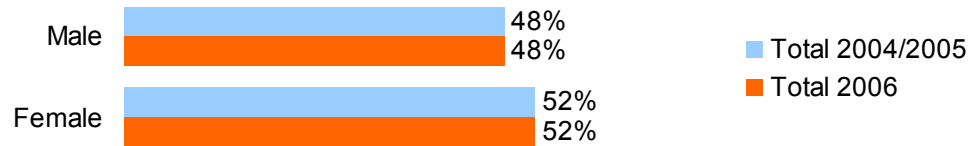


Base: All respondents at all Parks: 2004/2005: 2874 ; 2006: 3520

- A slightly different scale was used in 2006 to 2004 and 2005 to collect the age of respondents.
- Of all visitors to the Parks interviewed in summer and autumn combined in 2006, around half (49%) are aged 40 or over, while a similar proportion (51%) are aged 17 to 39. Around a quarter (26%) in 2006 are aged between 30 and 39 years. The average age of visitors interviewed at the Park is 41 years old in 2006, the same average age as in 2004/2005.

3.2 Gender Profile

Gender

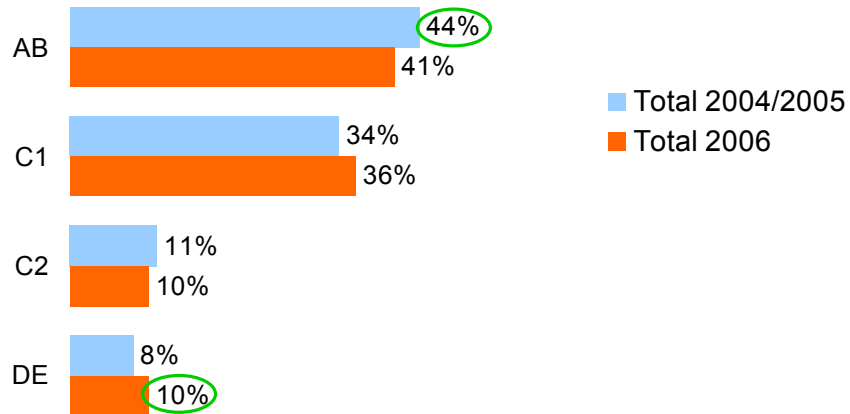


Base: All respondents at all Parks: 2004/2005: 2874 ; 2006: 3520

- The gender profile of visitors across all Parks is identical in 2006 to 2004/2005 and is very similar to that of the national profile.

3.3 Social Grade Profile

Social Grade

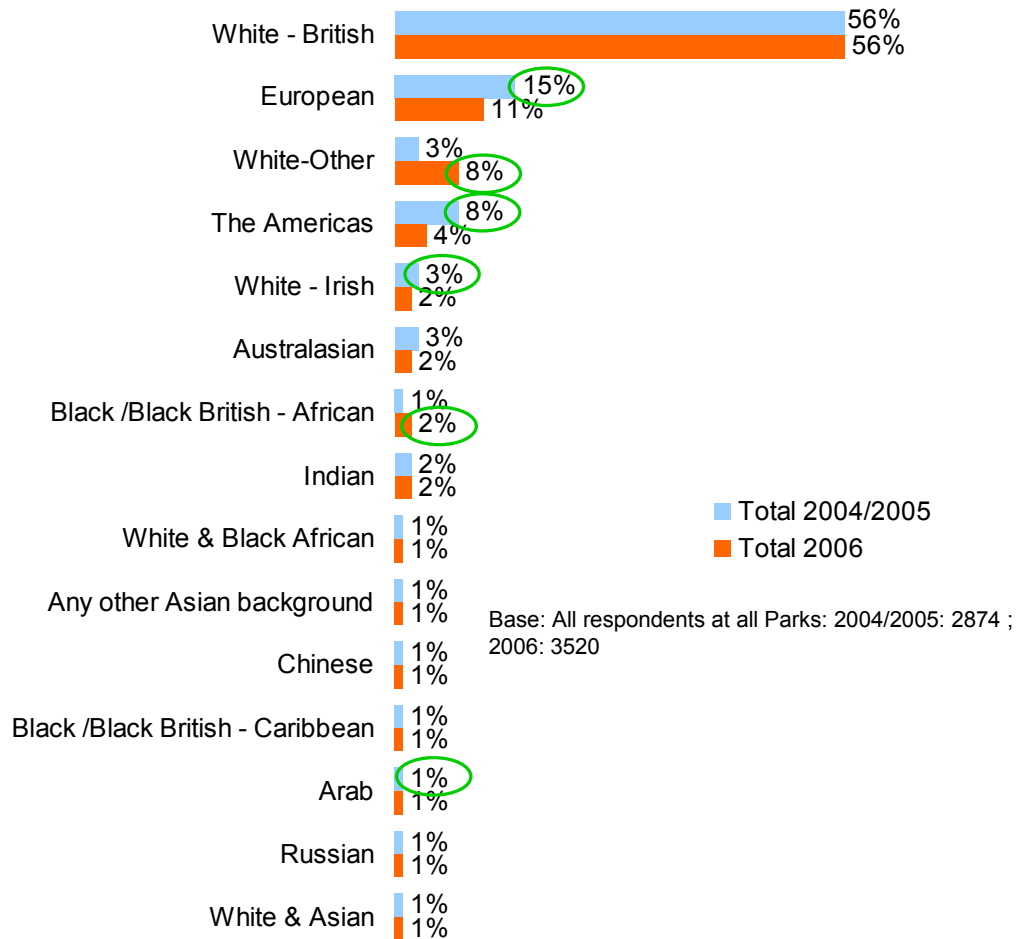


Base: All respondents at all Parks: 2004/2005: 2874 ; 2006: 3520

- In 2006, compared with the profile of the population as a whole, visitors across all Parks are heavily skewed towards the higher ABC1 social grades. Around two fifths (41%) of visitors overall are from the higher A and B social grades, compared to 26% for the overall population of Great Britain.
- However, significantly fewer respondents from A and B social grades were interviewed in 2006 than in 2004/2005, while significantly more from D and E social grades were interviewed.

3.4 Ethnic Profile

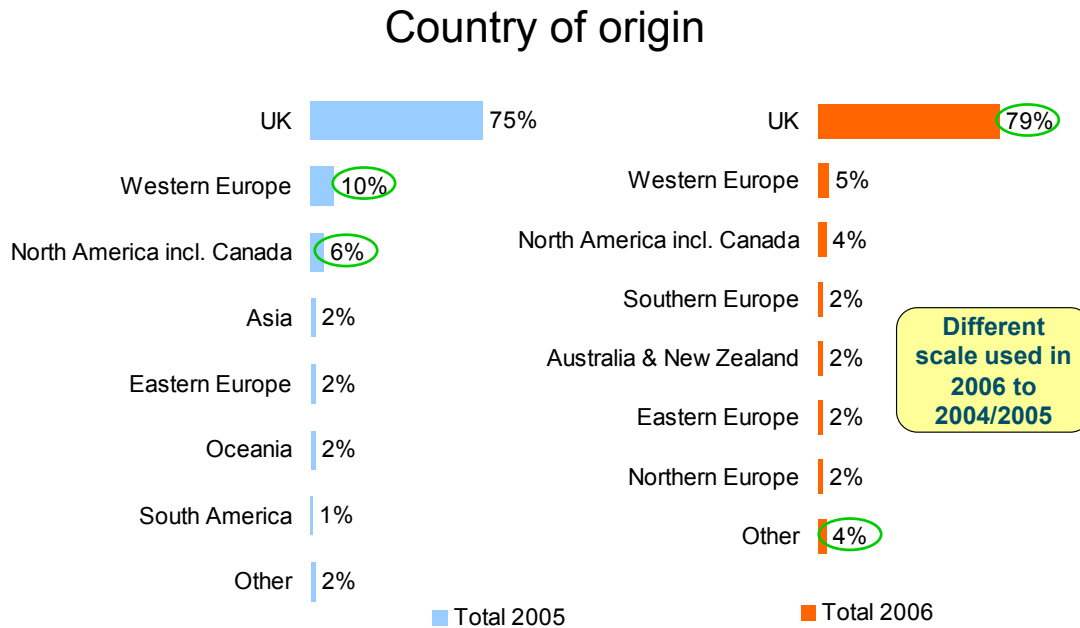
Ethnic Origin



- In 2006, as in 2004/2005, the majority (56%) of visitors across all Parks describe themselves as 'white'³.
- While the profile of visitors' ethnic origin is broadly similar in 2006 to 2004/2005, there are some differences. Notably, in 2006 compared to 2004/2005, significantly fewer respondents were interviewed from European origin and from the Americas, more were interviewed from White Other origin.

3.5 Country of Origin and Regional Residence

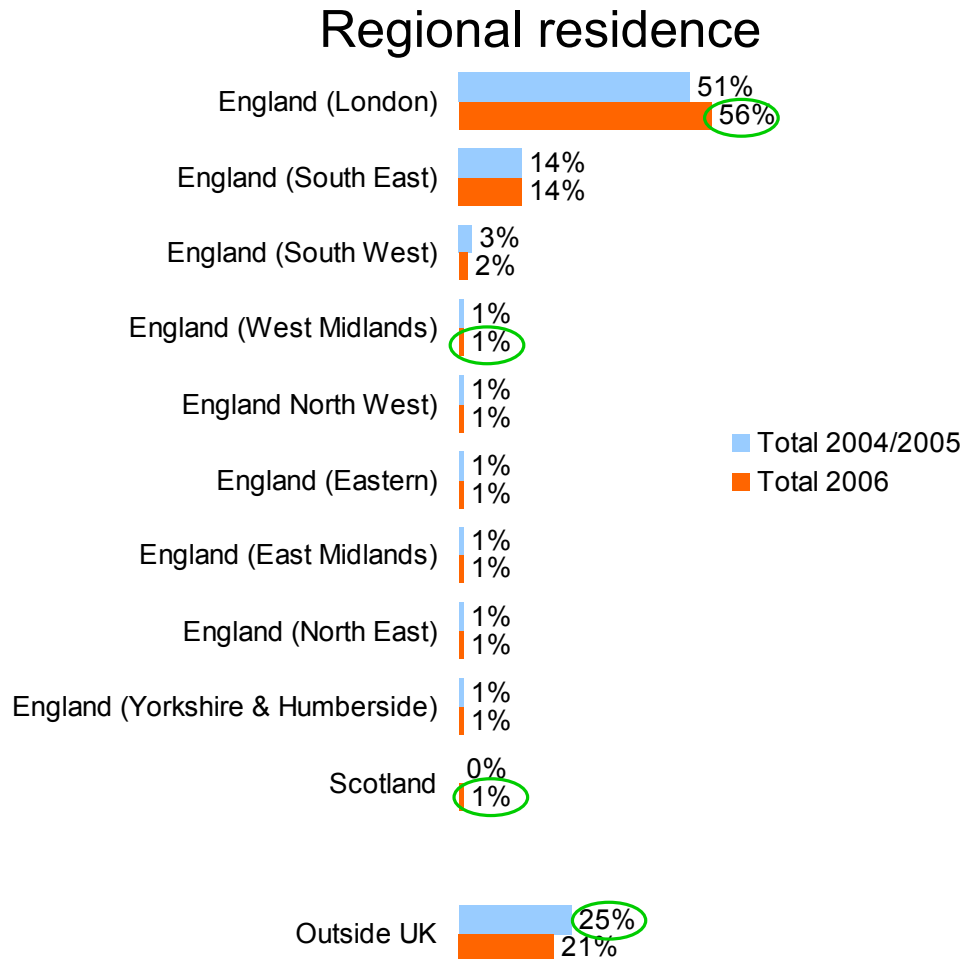
3.5.1 Country of Origin



- In 2006, as in 2004/2005, the majority (79%) of respondents interviewed live in the UK. This figure of 79% residing in the UK is significantly higher than the figure of 75% in 2004/2005.
- However, the proportion of respondents living in Western Europe in the 2006 surveys (5%) is significantly lower than the proportion in 2004/2005 (10%). This is also the case for North America incl. Canada (4% and 6% respectively).

³ Includes those describing their ethnic origin as 'Irish'.

3.5.2 Regional Residence

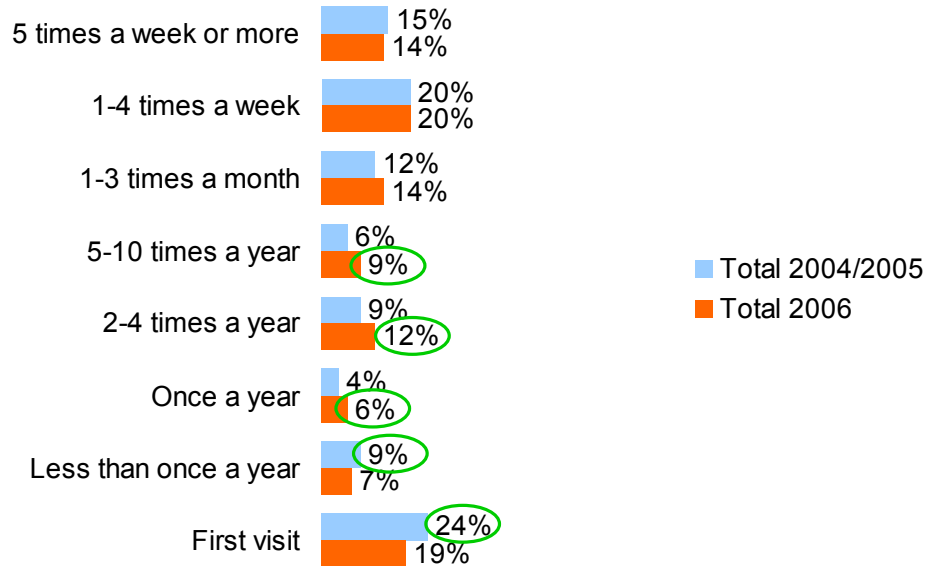


Base: All respondents at all Parks: 2004/2005: 2874 ; 2006: 3520

- Of UK residents, over half of visitors across Parks in 2006 (56%) reside in London. This proportion is significantly higher than the proportion in 2004/2005 (51%).
- Otherwise the profile of region of residence is very similar in 2006 to 2004/2005.

3.6 Frequency of Visiting the Parks

Frequency of visiting Parks



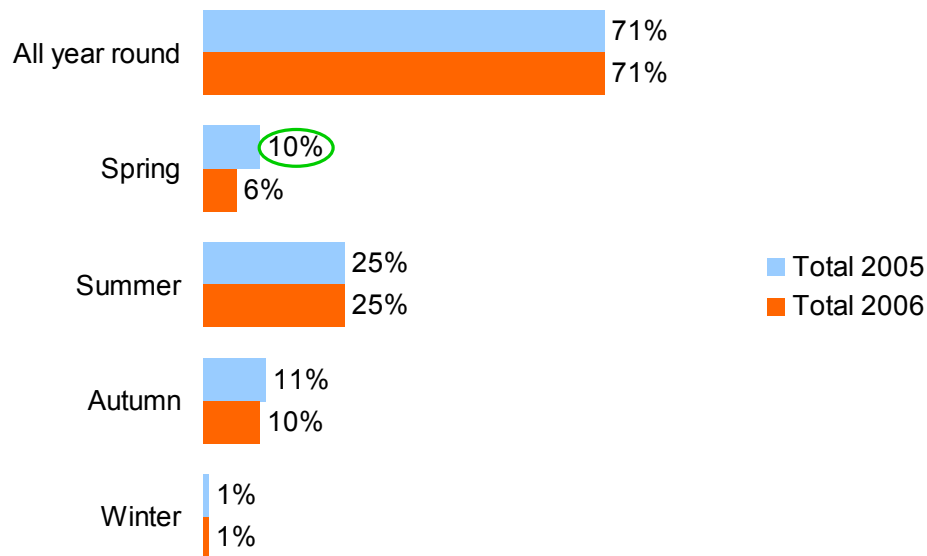
Base: All respondents at all Parks: 2004/2005: 2874 ; 2006: 3520

- In 2006, around half (48%) of visitors to the Parks in 2006 visit at least once per month, with a further fifth (21%) visiting twice a year or more often.
- The frequency of visiting in 2006 is broadly similar to in 2004/2005, although notably the proportion visiting for the first time in 2006 (19%) is significantly lower than in 2004/2005 (24%).

3.7 Seasons in Which Respondents Visit Parks

The chart below is based on all those not visiting the Park for the first time.

Seasons visit Parks

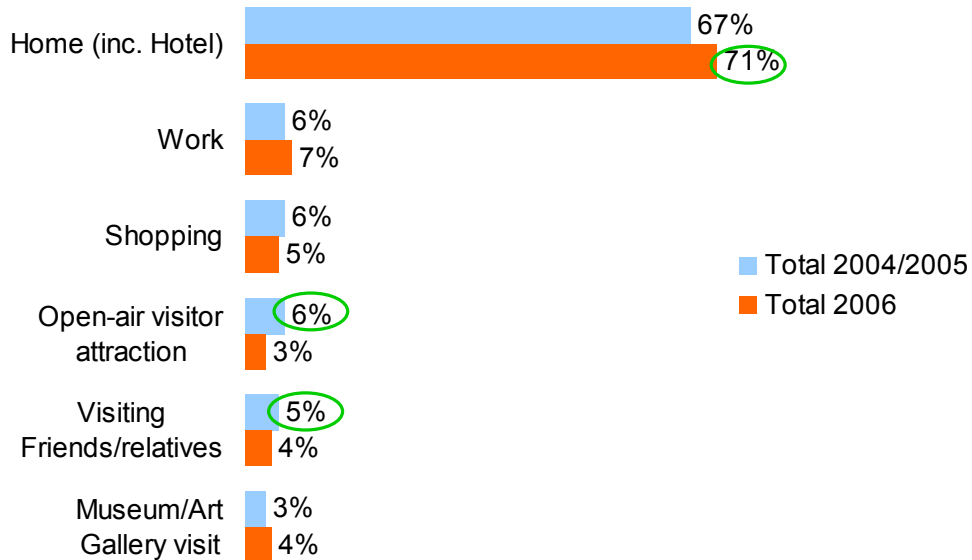


Base: All respondents not visiting for the first time: 2004/2005:
2185, 2006: 2838

- In 2006, the majority (71%) of visitors to the Parks (who are not visiting for the first time on the day of the interview) claim to visit all year round. This is identical to the proportion saying this in 2004/2005.
- The most popular season to visit the Park is summer (25% visit during this season in 2006), followed by autumn and autumn. Just 1% of visitors claim to visit in winter but not all seasons.
- In 2006, the proportion visiting in spring (but not all seasons) is significantly lower than in 2004: 6% and 10% respectively.

3.8 Journey Origin Before Visiting the Parks

Journey origin before visiting Park

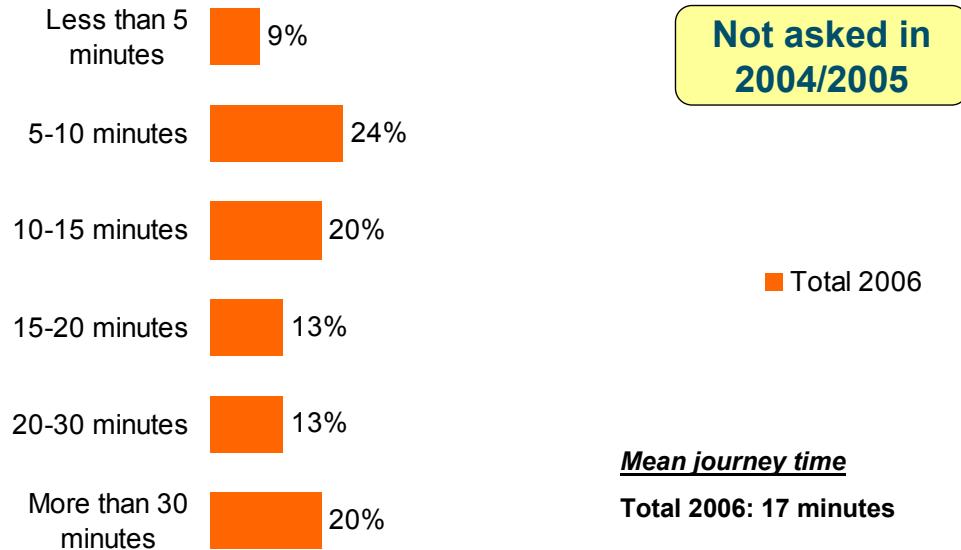


Base: All respondents at all Parks: 2004/2005: 2874 ; 2006: 3520

- In 2006, the majority (71%) of visitors immediately arrive at the Parks from home (including Hotels etc.). Less than 1 in 10 arrive from any other place.
- The profile of origin before going to a Park is similar across the years, although notably the proportion of visitors coming from home in 2006 (71%) is significantly higher than in 2004/2005 (67%).

3.9 How Long Journey to Park Took

How long journey to Park took

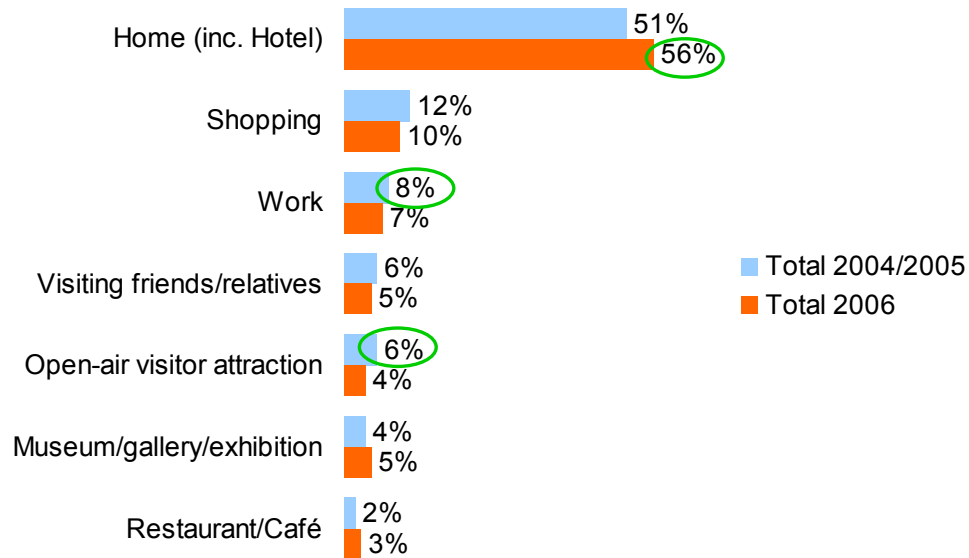


Base: All respondents at all Parks: 2006: 3520

- In 2006, respondents were asked how long their journey to the Park took (regardless of their means of transport). This question was not asked in 2004.
- The average time taken to reach the Park is 17 minutes. Around half (53%) take less than 15 minutes, while a similar proportion (46%) take more than 15 minutes.

3.10 Journey Destination After Visiting Park

Journey destination after visiting Park

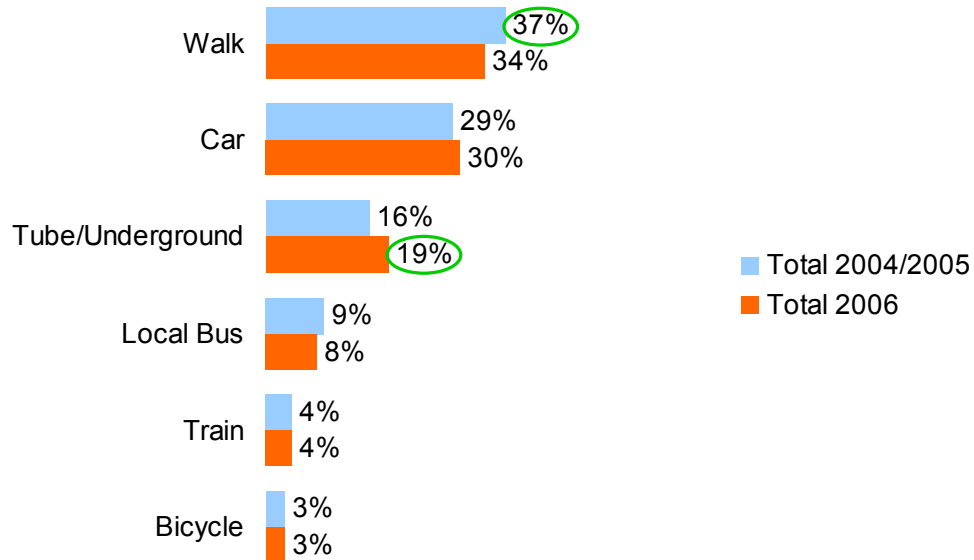


Base: All respondents at all Parks: 2004/2005: 2874 ; 2006: 3520

- In 2006, just as the majority of visitors immediately arrive at the Park from home (including Hotels etc.), the majority (56%) immediately go home after their visit to the Park. This proportion is significantly higher than in 2004/2005 (51%).
- Otherwise the profile of destinations is very similar in 2006 to 2004/2005.

3.11 Main Method of Transport to Park

Main transport to Park

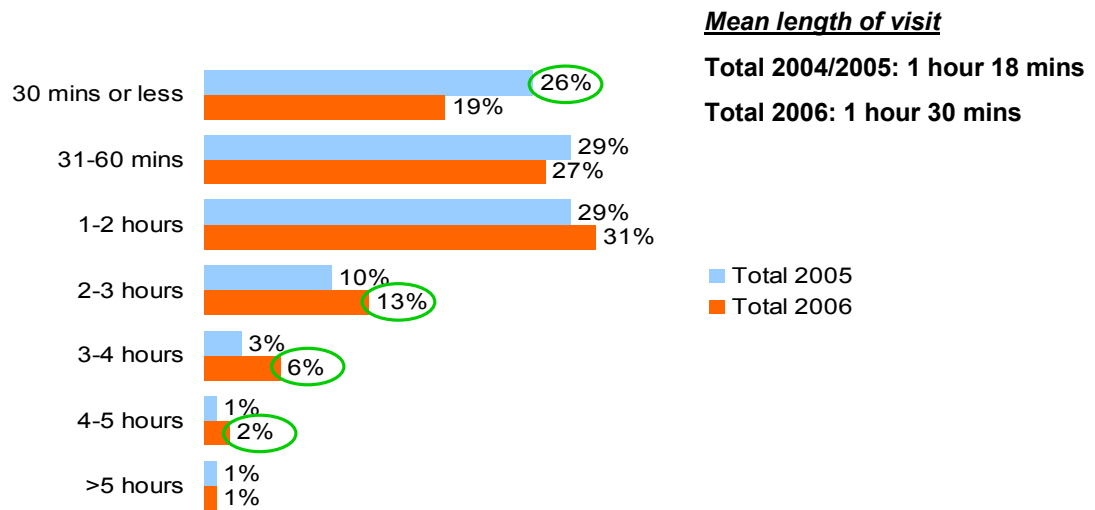


Base: All respondents at all Parks: 2004/2005: 2874 ; 2006: 3520

- In 2006, the profile of modes of transport used to reach the Parks is broadly similar to 2004/2005. The main two modes used are walking (34%) and by car (30%).
- The proportion travelling by Underground (19%) is significantly higher than in 2004/2005 (16%).

3.12 Length of visit to Park

Length of Park visit

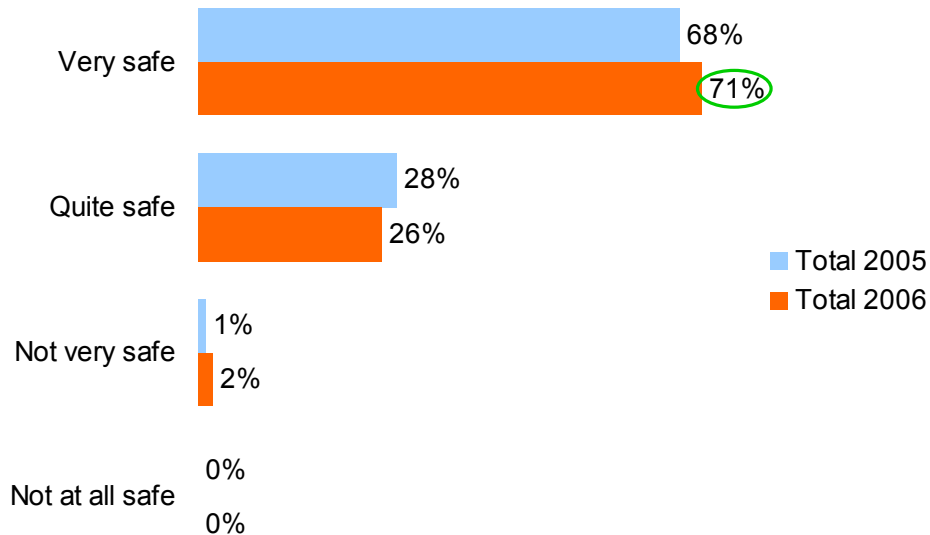


Base: All respondents at all Parks: 2004/2005: 2874 ; 2006: 3520

- In 2006, the average length of a visit across the Parks is 1 hour 30 minutes, which is slightly longer than the average length of visit in 2004/2005. The most common length of stay in 2006 is 1-2 hours (31%), followed by 31-60 minutes (27%).
- The proportion staying for short stays of 30 minutes or less is lower in 2006 than in 2004/2005, while the proportion staying for two hours or more is greater.

3.13 Feeling of Safety in Parks

Feeling of safety in Parks



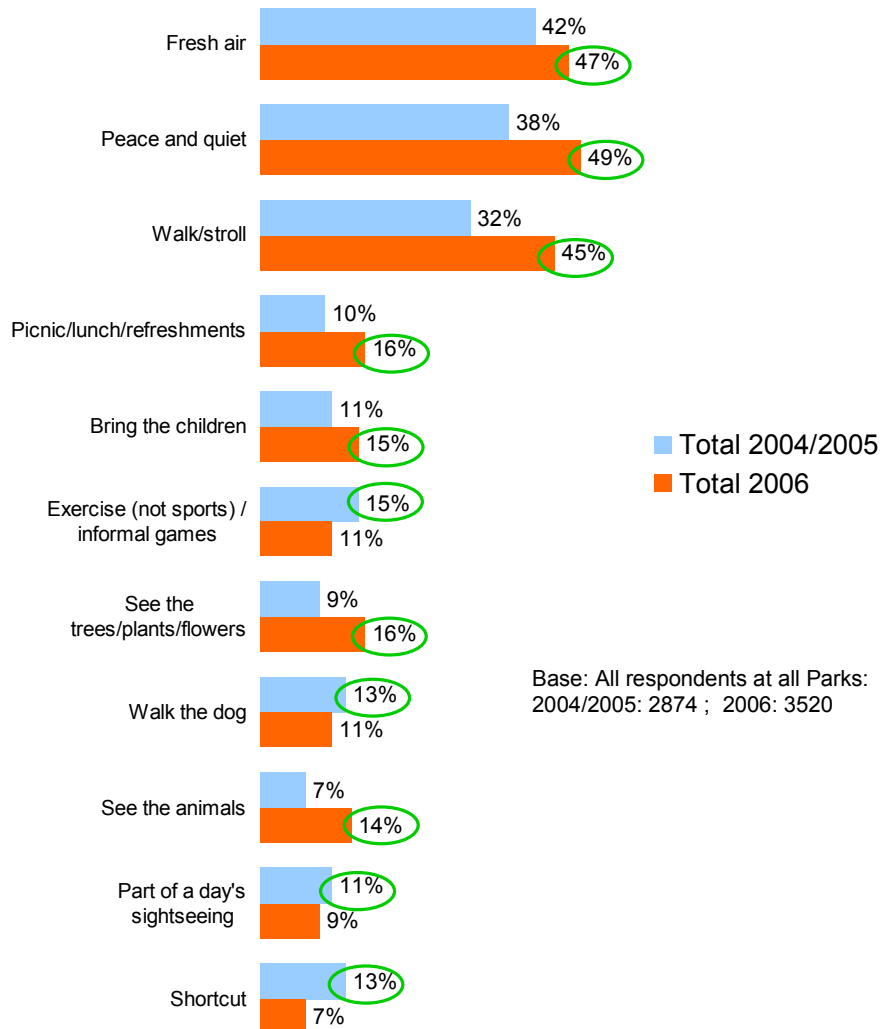
Base: All respondents at all Parks: 2004/2005: 2874 ; 2006: 3520

- Safety does not appear to be a problem at the Parks overall. Encouragingly, in both 2006 and 2004/2005, almost all (96%-97%) visitors to the Parks claim to feel safe to some extent (either 'very safe' or 'quite safe').
- Very few claim to feel 'not very safe' (2% in 2006), while less 0% claim say they feel 'not at all safe'.
- Encouragingly, the proportion saying they feel 'very safe' has increased in 2006 to 71% from 68% in 2004/2005.

3.14 Main Purposes for Visiting Parks

Visitors to the Parks were asked to spontaneously provide their main reasons for visiting on the day of the interview.

Main purposes for visiting Parks



- As the chart above shows, there is a wide variety of reasons given for having visited the Parks on the day of the interview. In the main, in both 2006 and 2004, activities tend to be fairly passive, with activities such as exercise/sports less prominent.

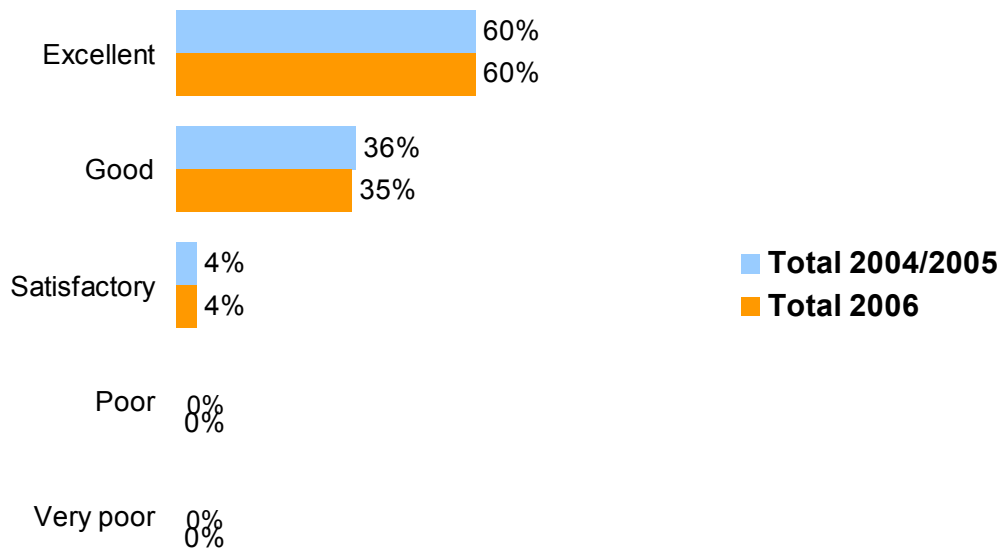
- In 2006, the main reasons for visiting are 'for peace and quiet' (49%), 'to get fresh air' (47%) and 'to walk/stroll' (45%).
- Whilst these were also the three main reasons for visiting in 2004/2005, they are all mentioned by a significantly higher proportion in 2006. Of these it is 'to walk/stroll' that has increased most as the purpose of the visit.
- In addition, the proportion saying they are visiting for a number of other reasons is significantly higher in 2006 than in 2004/2005, namely: 'picnic/lunch/refreshments', 'to bring the children', 'to see the trees/plants/flowers' and 'to see the animals'.
- Three activities are named significantly less in 2006 than in 2004/2005, namely 'to exercise (not sports)/informal games', 'to walk the dog' and 'part of a day's sightseeing'

3.15 Overall Quality of the Parks

3.15.1 Overall Quality of the Parks - All Parks Combined

The chart below shows the rating of the overall quality across all of the Parks and is based on visitors expressing an opinion.

Overall quality of the Parks

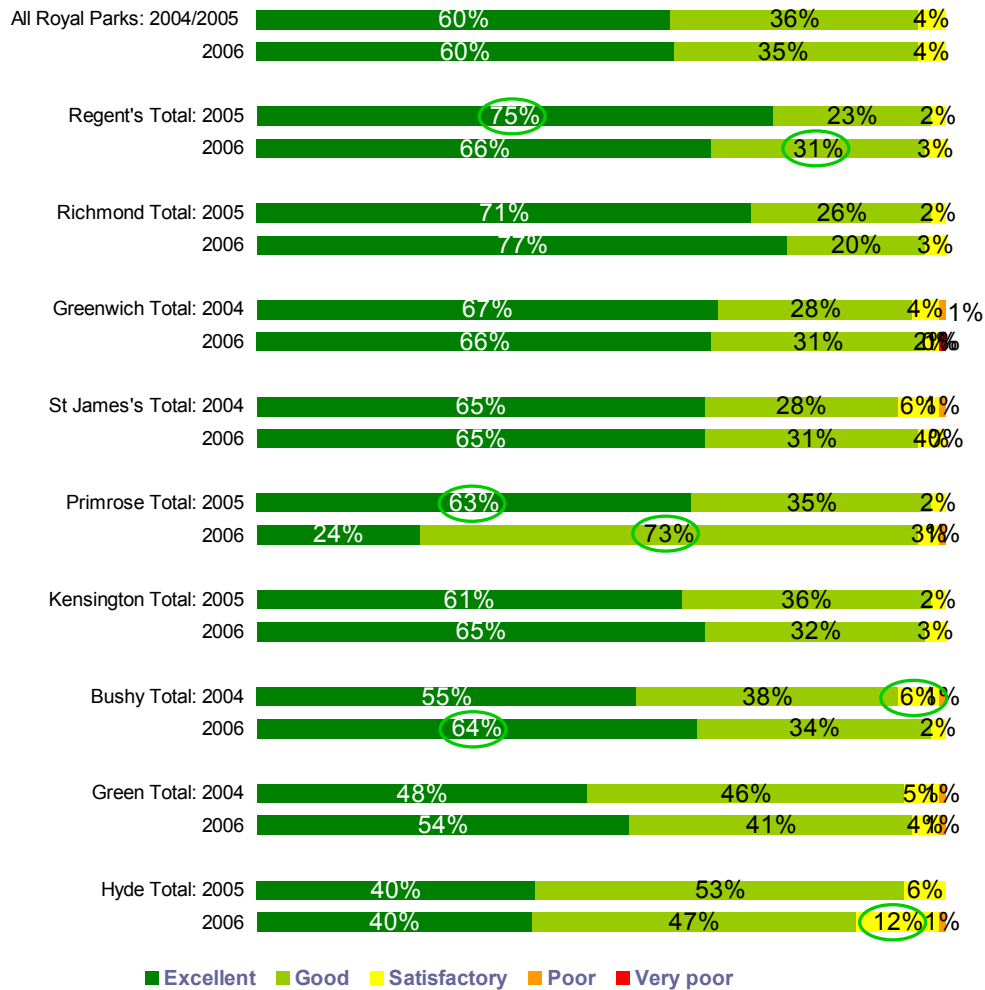


Base: All respondents at all Parks *expressing an opinion*: 2004/2005: 2812; 2006: 3504

- The level of the quality rating across the Parks combined in 2006 is almost exactly the same as in 2004/2005.
- The rating of the Parks overall remains high, with three fifths (60%) giving a rating of 'excellent' and around a third (35%) giving a 'good' rating. Encouraging, 0% gave a response of either 'poor' or 'very poor'.

3.15.2 Overall Quality of the Parks – By Park

Overall Quality of The Royal Parks – By Park



Base: All expressing an opinion: Regent's: 2005: 228, 2006: 260; Richmond: 2005: 333, 2006: 442; Greenwich: 2004: 343, 2006: 452; St James's: 2004: 327, 2006: 432; Primrose: 2005: 153; 2006: 179; Kensington: 2005: 382, 2006: 470; Bushy: 2004: 330, 2006: 441; Green: 2004: 342, 2006: 411; Hyde: 2005: 387; 2006: 420

- The chart above shows the overall quality rating of each of the nine Parks, along with the combined rating of all Parks.
- As discussed in the previous section, the rating of the Parks overall remains high, with three fifths (60%) giving a rating of 'excellent' and around a third (35%) giving a 'good' rating.
- In terms of the proportion giving an 'excellent' rating, the Park with the highest rating in 2006 is Richmond (77%), which has a considerably higher rating than all other Parks. The next highest

ratings are for Regent's and Greenwich (both 66%), St James's and Kensington (both 65%) and Bushy (64%).

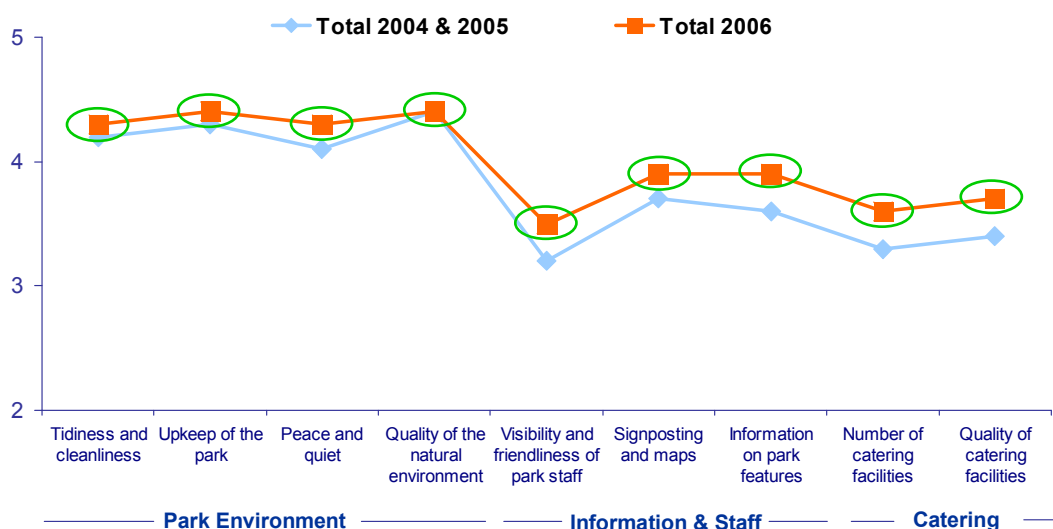
- Two of the three lowest scoring Parks in 2006 are the same as in 2004/2005, namely Hyde (40%) and Green (54%). But the lowest scoring Park is Primrose Hill (24%).
- While the overall quality for the Parks combined has remained very similar in 2006 to 2005/2004 (see the previous section), there are some differences by each of the different Parks:
- Focusing on the proportion rating the Parks as 'excellent', one Park saw an significant increase in the rating, namely Bushy, from 55% in 2004/2005 to 64% in 2006.
- Conversely, Regent's Park saw a decrease in the 'excellent' rating from 75% in 2004/2005 to 66% in 2006. The other Park to see a decrease is Primrose Hill. The proportion giving an excellent rating decreased from 63% in 2004/2005 to 24% in 2006. By analysing the rating of quality by the different sub-groups, it is evident that there are two principal sub-groups that are instrumental in this decline in Primrose Hill:
 - In autumn 2006 there was a large proportion of visitors interviewed who visit 5-10 times a year and it can be seen in section 7.6 that a much larger proportion of these was interviewed in 2006 than 2005. None of the 40 respondents (around half of all respondents) in this category gave an excellent rating.
 - In autumn 2006 there was also a large proportion of visitors interviewed who stayed for more than 2 hours at the Park and it can be seen in section 7.12 that a much larger proportion of these was interviewed in 2006 than 2005. Just 4% of the 67 respondents (around three quarters of all respondents) in this category gave an excellent rating.
- The 'excellent' scores for the other six Parks are statistically similar in 2006 to 2004/2005. These are: Richmond, Greenwich, St James's, Kensington, Green and Hyde.

3.16 KPI Performance Ratings for Parks – Mean Scores

Visitors were asked to state how satisfied they were with the individual aspects of the Parks (the Key Performance Indicators (KPI's)) using a scale of 'excellent', 'good', 'satisfactory', 'poor' and 'very poor'.

The chart below (1 of 2) shows the *mean score* satisfaction ratings (out of 5) across all Parks in respect of aspects relating to *Park Environment*, *Information and Staff* and *Catering*⁴. The following chart overleaf (2 of 2) shows the mean score satisfaction ratings in respect of aspects relating to *Toilets*, *Other Facilities* and *Ease of Getting Around*.

KPI Performance Ratings (1 of 2)



Base: All respondents at all Parks expressing an opinion: 2004 & 2005: max: 2842, min: 577; 2006: max: 3520; min: 1582

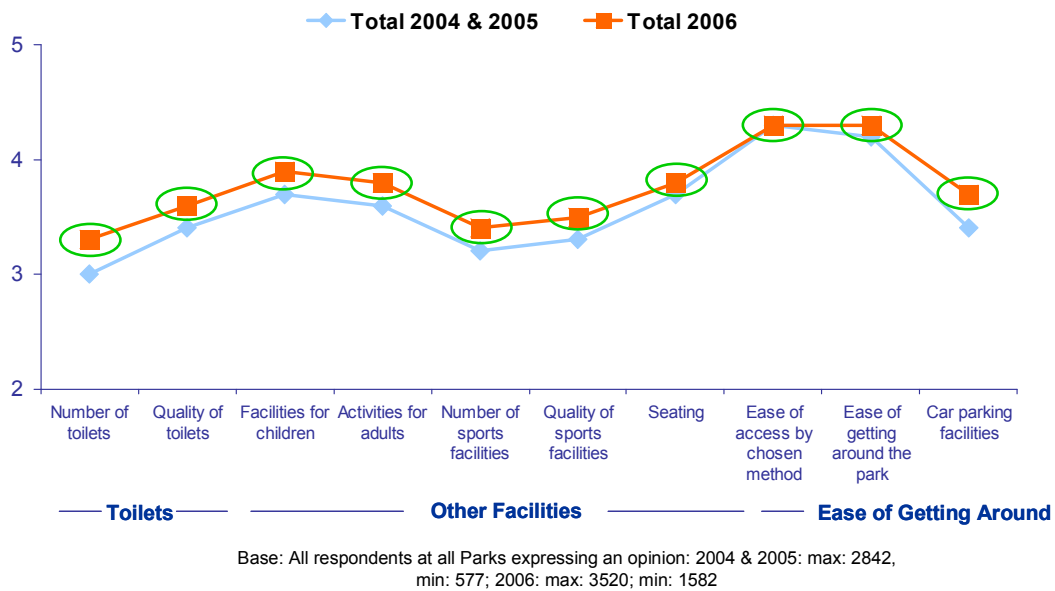
- In 2006, as in 2004/2005, the Parks score highly on aspects relating to the *Park Environment*, but achieve lower scores in respect of aspects relating to both *Information and Staff* and *Catering*.
- It can be seen that, encouragingly, across all Parks combined, the Parks received significantly higher ratings across all aspects of *Park Environment*, *Information and Staff* and *Catering* in 2006 than in

⁴ Please note that figures are based on all visitors expressing an opinion.

2004/2005. Of all of the specific aspects, the largest increases seen are for 'visibility and friendliness of Park staff', 'information on Park features', 'number of catering facilities' and 'quality of catering facilities'.

The chart below (2 of 2) shows the mean score satisfaction ratings (out of 5) for the Parks in respect of aspects relating to *Toilets*, *Other Facilities* and *Ease of Getting Around*.

KPI Performance Ratings (2 of 2)



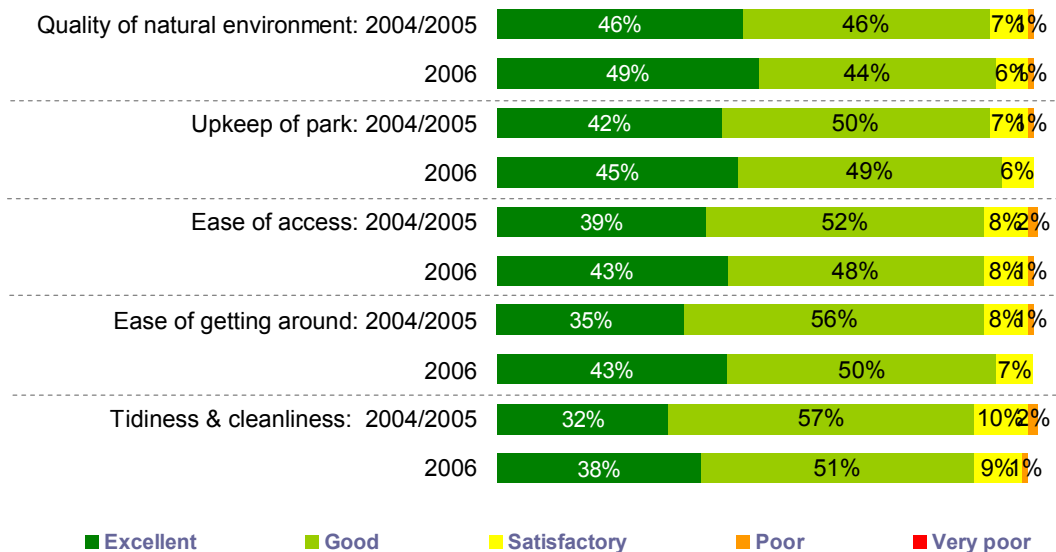
- In 2006, as in 2004/2005, the Parks are rated relatively highly for two of the three aspects relating to *Ease of Getting Around* ('ease of access' and 'ease of getting around'). The Parks received lower ratings overall for 'number of toilets', 'quality of toilets', 'number of sports facilities' and 'quality of sports facilities'.
- Very encouragingly it can be seen that across the Parks, in 2006 the ratings are higher for all aspects of *Toilets*, *Other Facilities* and *Ease of Getting Around* also. Of the specific aspects, the increase is highest for 'car parking facilities'.

3.17 KPI Performance Ratings Across all Parks – Distribution of Ratings

The four charts below and overleaf show the distribution of satisfaction ratings given by visitors for the different aspects of the Parks (ranked in order of the proportion giving an 'excellent' rating in 2004).

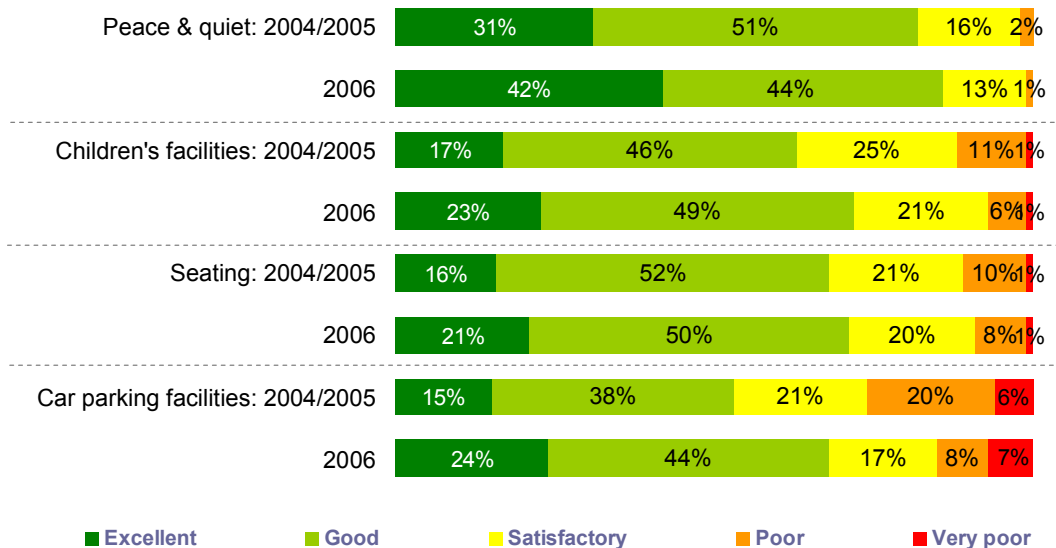
Please note that no significant differences are shown on these charts.

KPI Performance Ratings (1 of 4)



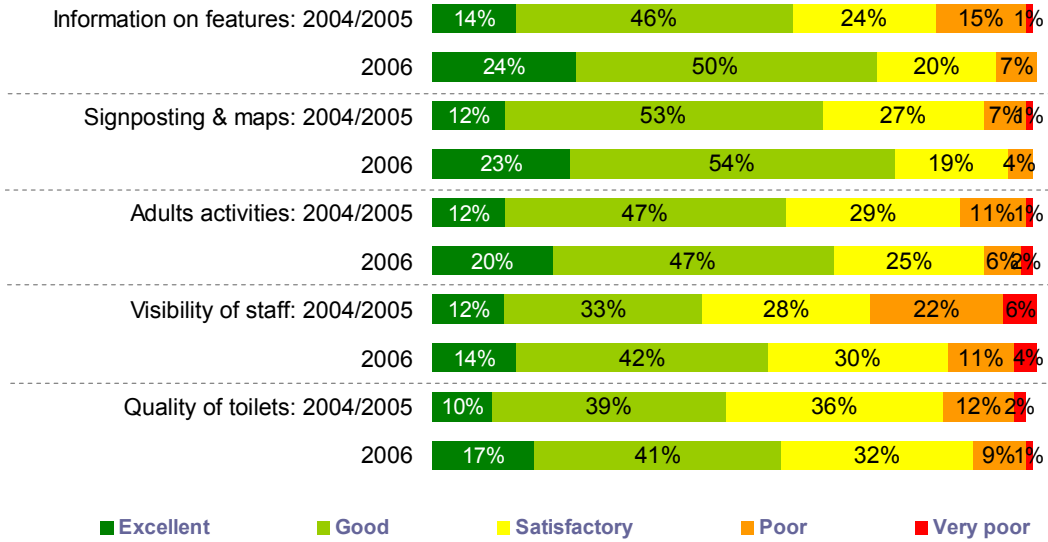
Base: All respondents at all Parks expressing an opinion: 2004/2005: max: 2842, min: 577; 2006: max: 3520, min: 1582

KPI Performance Ratings (2 of 4)



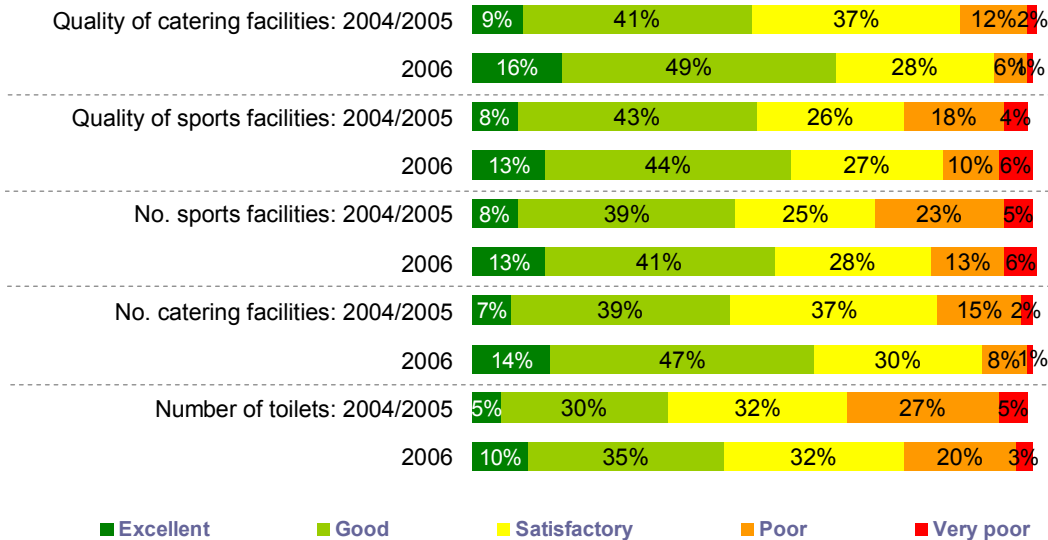
Base: All respondents at all Parks expressing an opinion: 2004/2005: max: 2842, min: 577; 2006: max: 3520, min: 1582

KPI Performance Ratings (3 of 4)



Base: All respondents at all Parks expressing an opinion: 2004/2005: max: 2842, min: 577; 2006: max: 3520, min: 1582

KPI Performance Ratings (4 of 4)



Base: All respondents at all Parks expressing an opinion: 2004/2005: max: 2842, min: 577; 2006: max: 3520, min: 1582

3.18 Strategy Matrix

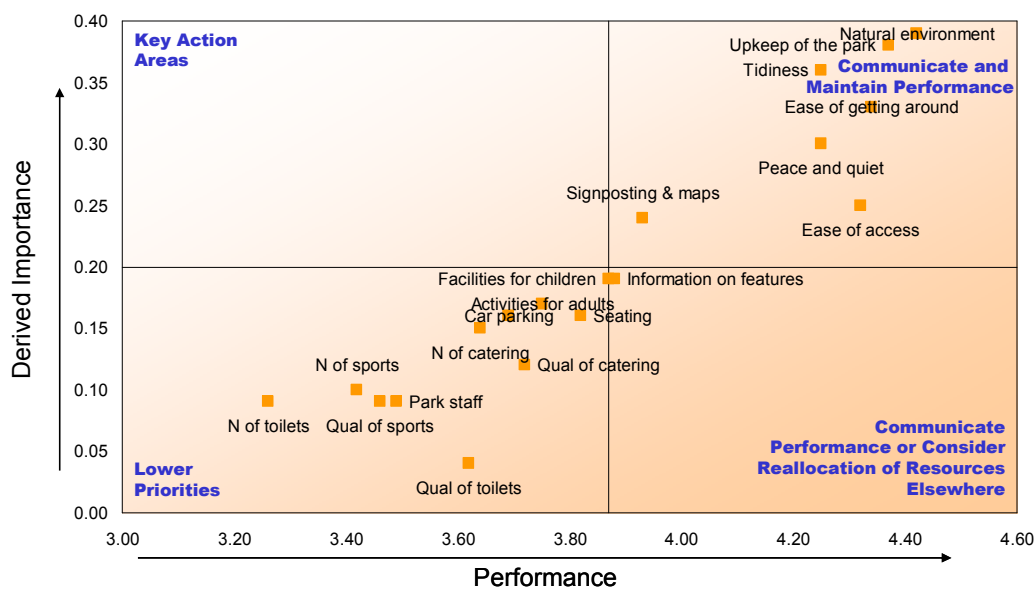
Strategy matrices are an effective way of identifying how KPI areas may be addressed, given both their importance and performance. The matrices plot importance (derived by conducting Key Driver Analysis⁵) versus performance (satisfaction rated by respondents).

The four quadrants of the matrix show which aspects of the Parks' offerings could potentially:

- be *improved* (Key Action Areas - top left)
- be *maintained and communicated* (Communicate and Maintain Performance- top right)
- be considered *lower priorities* (Lower Priorities - bottom left)
- be considered for *communicate performance or reallocation of resources* (Communicate Performance or Consider Reallocation of Resources Elsewhere - bottom right)

The Strategy Matrix for all of the Parks combined, based on the 2006 visitor data, is shown below. Given that these findings are for all Parks combined, it is important to look at the matrices for each of the individual Parks also.

Strategic Matrix - Total Parks



⁵ The relative importance of each of the different aspects are calculated by conducted a statistical technique called Key Driver Analysis, a type of regression analysis.

It can be seen from the strategy matrix that encouragingly no aspects fall into the Key Action Areas.

The aspects closest to comprising a Key Action Area are 'facilities for children' and 'information on Park features', although the performance for these is not quite low enough and their importance not quite sufficient for them to be Key Action Areas rather than Lower Priorities.

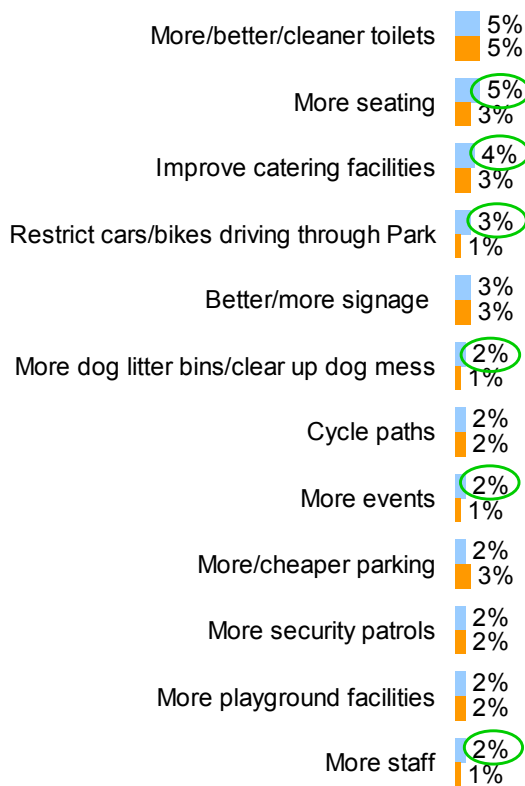
With the exception of one aspect, which is a borderline 'Lower Priority' ('information on Park features'), all aspects fall either into the 'Communicate and Maintain Performance' quadrant or 'Lower Priorities'.

There is a large number of aspects which both perform highly and are of high importance and it is therefore important that the emphasis on these are maintained, in order to preserve the high satisfaction levels. Moreover, given the high scores, there is an opportunity to communicate these aspects more strongly to visitors and potential visitors. It is all of the aspects of *Park Environment* that feature most strongly in this segment, as well as 'ease of getting around'.

3.19 Aspects That Could Increase Enjoyment of Parks

Visitors were asked, without prompting, what improvements, if any, they would like to see made at the Parks.

Aspects to increase enjoyment of Parks



Base: All respondents interviewed: 2004 & 2005: 2874; 2006: 3520 - Mentions 2%+ only.



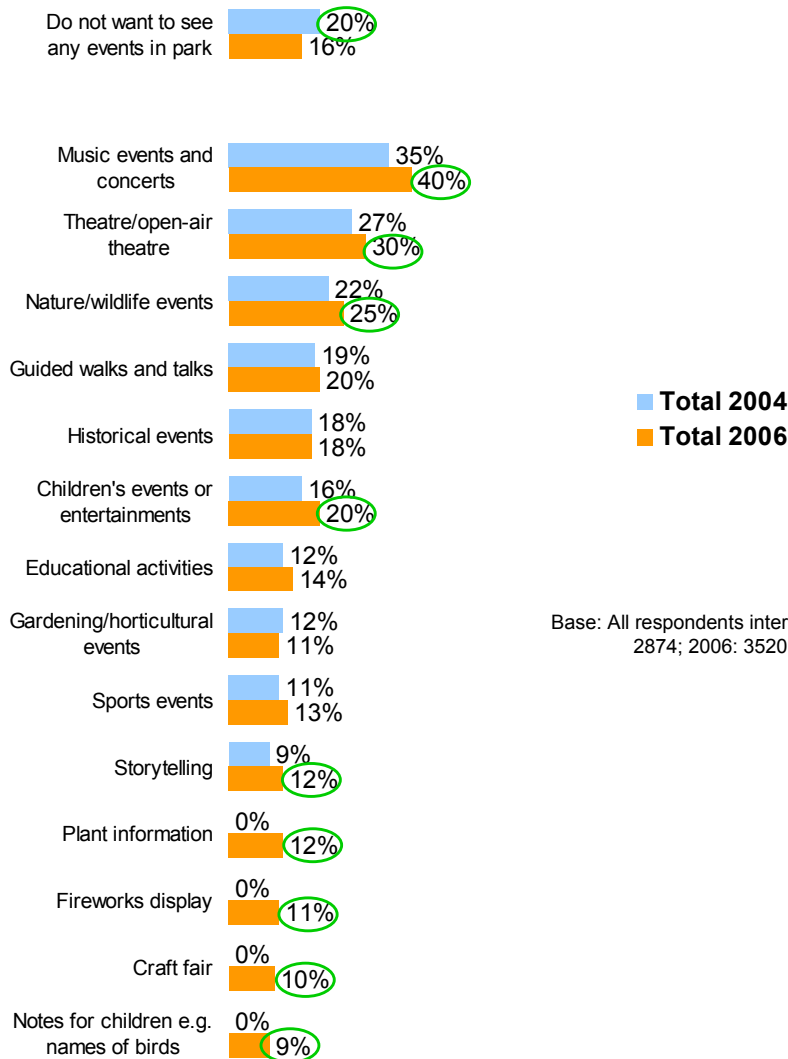
- In 2006, many visitors (41%) to the Park were unable to provide any suggestions for improvement, and encouragingly this is significantly higher than the proportion in 2004/2005 (34%).
- Around a quarter (23%) of visitors stated that the Park is fine/good as it is, a similar proportion to in 2004/2005.
- Neither in 2006 nor in 2004/2005 is there one aspect that over 10% of visitors mentioned as something that could increase their

enjoyment, which would signify that action should be taken to address this level of concern.

- Consistent with the increase in the proportion saying there is nothing that could be done to improve the Parks, positively, there has been a decrease in the proportion naming a number of aspects in 2006 compared to 2004/2005, while there have been no increases. The decreases in mentions are for 'more seating', 'improve catering facilities', 'restrict cars/bikes driving through Park', 'more dog litter bins/clear up dog mess', 'more events' and 'more staff'.

3.20 Information, Educational and Cultural Activities and Events Requested in the Parks

Information, educational and cultural activities and events requested in the Parks



- In 2006 the proportion of respondents saying they do not want any events in the Park is 16%, which is significantly lower than in 2004/2005 (20%).
- The main type of event requested is 'music events and concerts', requested by 40% in 2006, significantly more than in 2004/2005 (35%). Other requests made by more than 20% of visitors in 2006

are 'theatre/open-air theatre' (30%) and 'nature/wildlife events' (25%).

- Consistent with this decrease, there has been an increase in the proportion asking for some activities and events. Indeed, as can be seen by the green rings in the chart, there has been an increase in the proportion asking for most of the events listed. The largest increases are for 'plant information', 'fireworks display', 'craft fair' and 'notes for children e.g. names of the birds', with none of these requested by more than 0% in 2004/2005.
- In terms of differences by Park, the following activities and events were named by a considerable proportion (25% or more) by visitors in the Parks listed:

Music events & concerts: This aspect is identified by a significant proportion of visitors interviewed In-Parks as a possible facility that would enhance their enjoyment of:

- All Parks except Primrose Hill

Theatre/open-air theatre: This aspect is identified by a significant proportion of visitors interviewed In-Parks as a possible facility that would enhance their enjoyment of:

- All Parks except Primrose Hill

Nature and wildlife events: This aspect is identified by a significant proportion of visitors interviewed In-Parks as a possible facility that would enhance their enjoyment of:

- St. James's
- Hyde
- Bushy
- Green
- Richmond

Children's entertainments and events: This aspect is identified by a significant proportion of visitors interviewed In-

Parks as a possible facility that would enhance their enjoyment of:

- Bushy
- Greenwich

Guided walks and talks: This aspect is identified by a significant proportion of visitors interviewed In-Parks as a possible facility that would enhance their enjoyment of:

- Hyde
- Richmond

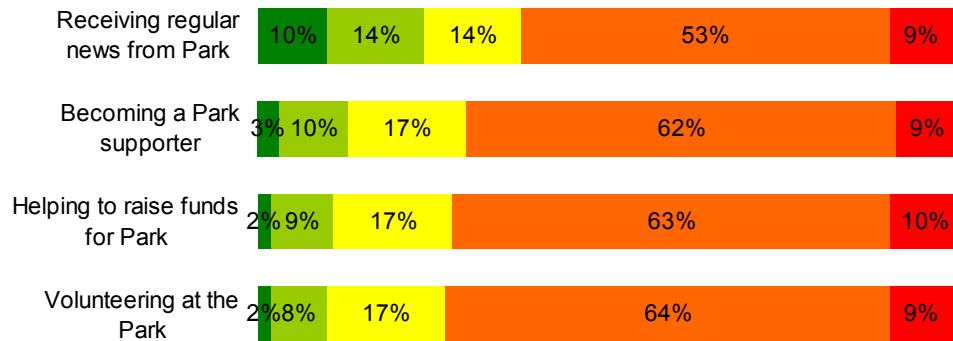
Historical events: This aspect is identified by a significant proportion of visitors interviewed In-Parks as a possible facility that would enhance their enjoyment of:

- Hyde
- Greenwich

3.21 Interest in Helping the Parks or Having Greater Contact with Parks

Visitors were asked their level of interest in four different activities in which they could participate related to helping the Parks or having greater contact with it.

Interest in helping or greater contact with Parks



■ Very interested ■ Fairly interested ■ Not particularly interested ■ Not at all interested ■ No opinion

Not asked in 2004/2005

Base: All respondents at all Parks: 2006: 3520

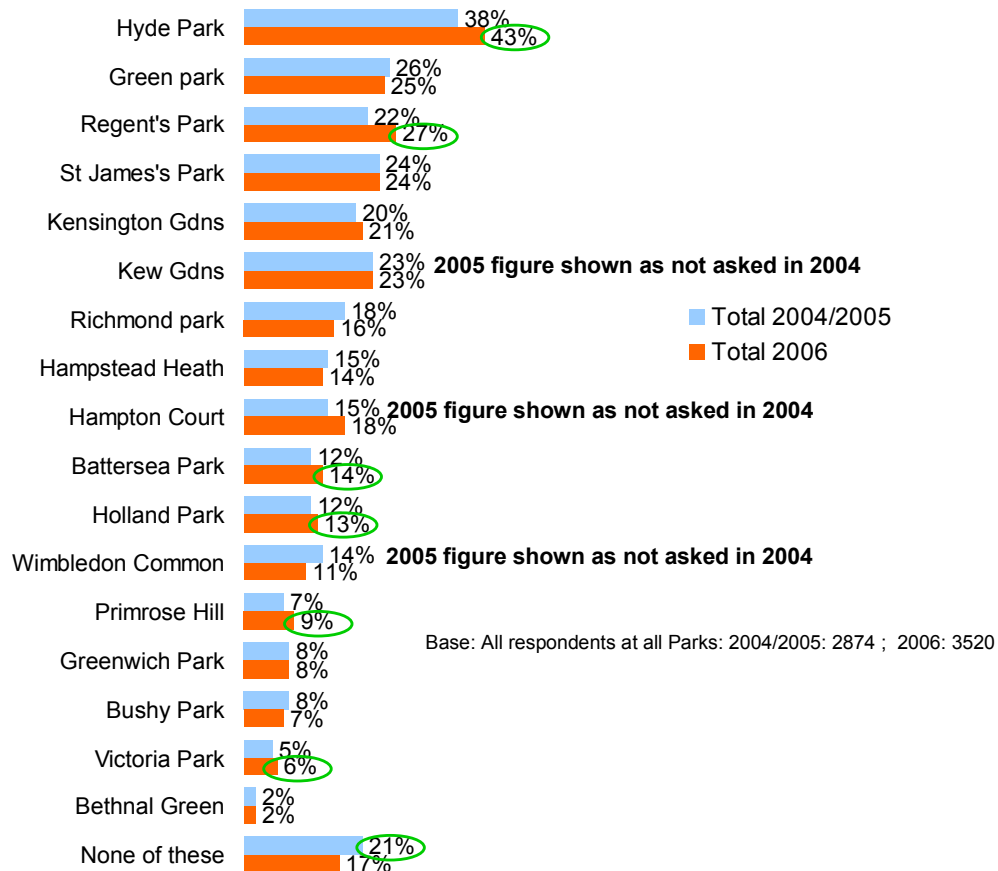
- It can be seen from the chart above that interest is highest in the more passive of the four options: 'receiving regular new from the Park'. However, interest is relatively low for this with around a quarter (25%) saying they are interested (either 'very' or 'fairly'). Of these, 10% said they are 'very interested', while 14% say they are 'fairly interested'.
- The proportion interested in the other three activities is relatively low, with 13% saying they are interested (either 'very' or 'fairly') in 'becoming a Park supporter', 11% for 'helping to raise funds for Park' and 10% for 'volunteering at the Park'. For all of these three

activities, the proportion saying they are 'very interested' is very low: 2% or 3%.

3.22 Other Parks or Attractions Visited in the Past Year

Visitors were shown a list of other parks and attractions and asked whether they had visited any of them in the past year.

Other Parks and attractions visited in last year



- In 2006, most visitors (83%) claim to have visited one of the parks or attractions listed in the past year, although this is lower than in 2004/2005 (79%).
- Hyde Park receives the highest proportion of mentions by far, with two fifths (43%) claiming to have visited it in the past year. This is significantly greater than in 2004/2005. Regent's, Green and St James's are the next most visited Parks (around a quarter in 2006).
- The profile of Parks and attractions visited is broadly similar in 2006 to 2004/2005.