The Royal Parks

Research Programme 2017-18

November 2018

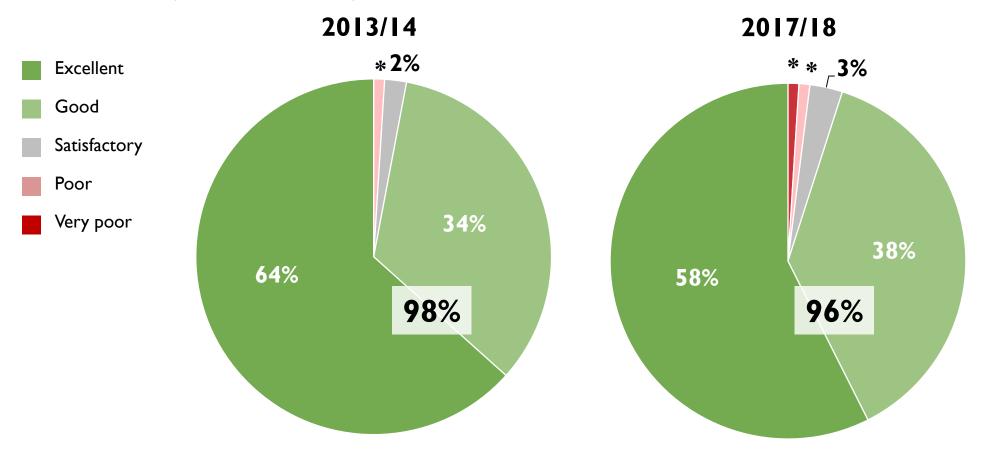THE
ROYAL
PARKS

Research with visitors

THE ROYAL PARKS

Visitors' views of the parks

Visitors are extremely positive about the parks, although *excellent* ratings have fallen slightly

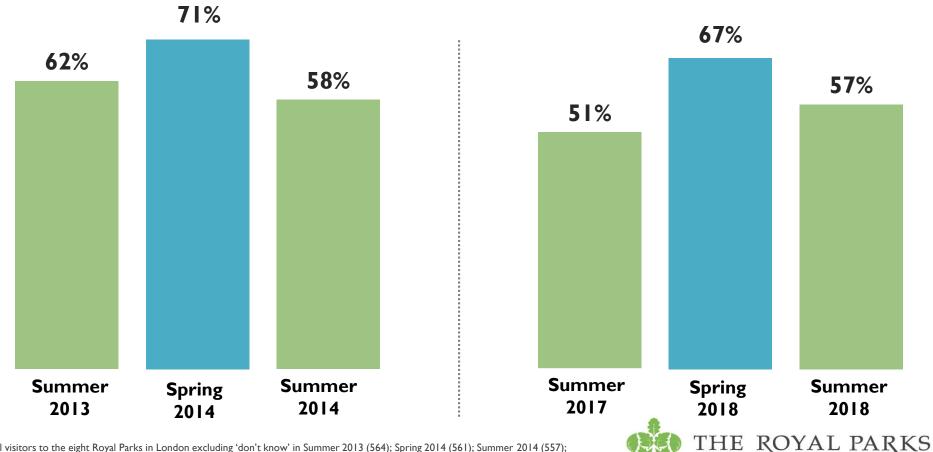Q. How would you rate the quality of the park overall?

2013/14

2017/18

- 🟩 Excellent
- 🟩 Good
- ⬜ Satisfactory
- 🟥 Poor
- 🟥 Very poor

2013/14
* 2%
34%
64%
98%

2017/18
* * 3%
38%
58%
96%

THE ROYAL PARKS

There is a clear seasonal pattern in *excellent* ratings, which recovered after Summer 2017

Q. How would you rate the quality of the park overall?

% Excellent

Summer 2013	Spring 2014	Summer 2014	Summer 2017	Spring 2018	Summer 2018
62%	71%	58%	51%	67%	57%

THE ROYAL PARKS

Variations in sample profile are unlikely to fully explain seasonal differences in ratings (1)

	Summer 2018 (1099)	Spring 2018 (845)	Summer 2017 (843)	2017-18 (2787)	2013-2014 (1699)
Female	50%	51%	45%	48%	51%
Male	50%	49%	55%	52%	47%
In another way	*	-	-	*	-
White	72%	84%	70%	75%	-
BME	25%	15%	30%	24%	-
16 - 24	13%	12%	15%	13%	13%
25 - 34	24%	25%	25%	24%	25%
35 - 44	24%	22%	26%	24%	22%
45 - 54	16%	16%	14%	15%	15%
55 - 64	12%	13%	10%	12%	12%
65 - 74	10%	10%	7%	9%	9%
75+	2%	3%	3%	3%	4%

Base: All visitors to the eight Royal Parks in London in 2013/14 (1,699); Summer 2017 (843); Spring 2018 (845); Summer 2018 (1099).
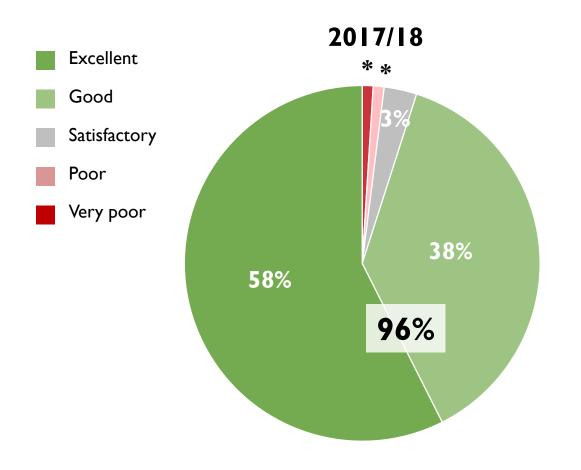
THE ROYAL PARKS

Variations in sample profile are unlikely to fully explain seasonal differences in ratings (2)

	Summer 2018 (1099)	Spring 2018 (845)	Summer 2017 (843)	**2017-18 (2787)**	**2013-2014 (1699)**
Frequent user	51%	52%	48%	51%	-
Infrequent user	49%	48%	51%	49%	-
London	62%	58%	59%	60%	54%
Outside of UK	24%	22%	26%	24%	24%
Up to 1 hour spent in the park	40%	43%	35%	39%	-
1 to 3 hours	54%	50%	57%	54%	-
3 hours +	5%	7%	8%	7%	-

THE ROYAL PARKS

Local visitors are most likely to give *excellent* ratings, and this is consistent across seasons

Q. How would you rate the quality of the park overall?

2017/18

* *

- Excellent
- Good
- Satisfactory
- Poor
- Very poor

58%

38%

3%

96%

More likely than overall to give an 'excellent' rating:

- 🌳 Frequent visitors (66%)
- 🌳 Visitors living within half a mile of the parks (72%)
- 🌳 Visitors aged 55-64 (64%) and 65+ (69%)
- 🌳 Women (61%)
- 🌳 White visitors (63%)

These groups are consistently likely to give 'excellent' ratings across the 2017/18 waves.

THE ROYAL PARKS

Some differences in weather across the waves but again, no clear link with park ratings

		Summer 2018 (1099)	Spring 2018 (845)	Summer 2017 (843)	2013-2014 (1699)
Sunny	☀️	34%	49%	41%	55%
Cloudy	☁️	25%	23%	28%	26%
Intervals	🌤️	32%	26%	28%	10%
Raining, light showers		6%	1%	2%	4%
Raining, light constant	🌧️	2%	*	1%	2%
Raining, heavy constant		1%	*	1%	1%

THE ROYAL PARKS

Variations in *excellent* ratings across the parks follow the seasonal pattern, but with exceptions

Q. How would you rate the quality of the park overall?

% Excellent   ■ Summer 2017   ■ Spring 2018   ■ Summer 2018

Park	Summer 2017	Spring 2018	Summer 2018
St James' Park	48	68	57
The Green Park	35	53	36
Hyde Park	56	49	50
Kensington Gardens	50	58	72
Bushy Park	35	76	54
Greenwich Park	57	75	56
Richmond Park	62	72	63
Regent's/Primrose Hill	67	82	67

THE ROYAL PARKS

Views of the park environment are stable, but there are declines on park facilities

Q. Please could you tell me how you would rate each aspect by choosing an answer from this card?

2017/18

■ % Excellent/good   ■ % Poor/very poor

% point change to 'excellent'/'good' since 2013/14

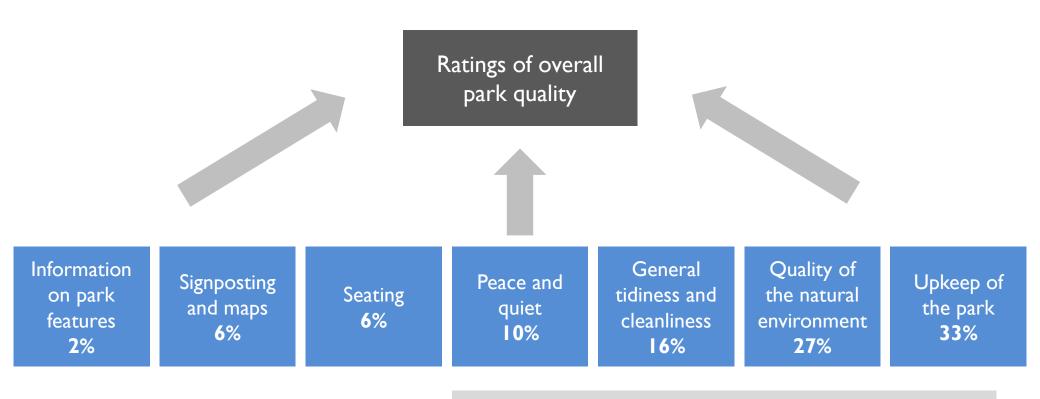| Aspect	% Excellent/good	% Poor/very poor	% point change
Quality of the natural environment (2764)	94	1	-2
Upkeep of the park (2749)	93	1	0
General tidiness and cleanliness (2766)	91	1	-1
Peace and quiet (2758)	85	1	0
Signposting and maps (2503)	76	6	-7
Information on park features (2459)	74	7	-5
Seating (2714)	73	7	-2
Facilities for children (1699)	72	7	-7
Quality of sports facilities (1398)	68	10	-5
Overall quality of toilets (1595)	60	14	-12

THE ROYAL PARKS

Seasonal pattern more evident in ratings of the park environment than facilities – likely related to overall views

Q. Please could you tell me how you would rate each aspect by choosing an answer from this card?

Legend: ■ Summer 2017 ■ Spring 2018 ■ Summer 2018 — *% Excellent*

Aspect	Summer 2017	Spring 2018	Summer 2018
Quality of the natural environment	44	60	50
Upkeep of the park	40	52	42
General tidiness and cleanliness	39	50	39
Peace and quiet	32	39	30
Seating	22	22	17
Signposting and maps	22	16	16
Facilities for children	17	21	17
Quality of sports facilities available	17	15	13
Information on park features	17	13	12
Overall quality of toilets	12	9	5

THE ROYAL PARKS

Views of the park environment have greater importance than facilities in explaining overall ratings, but there are other factors involved

	Ratings of overall park quality	

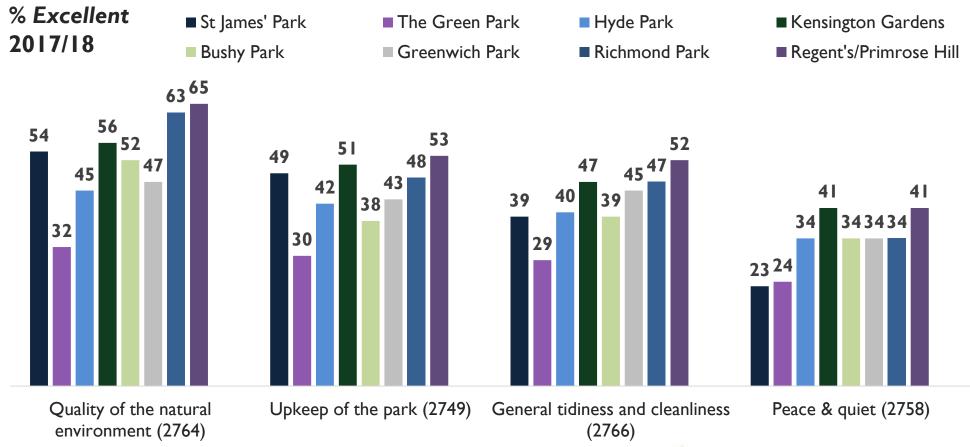| Information on park features **2%**	Signposting and maps **6%**	Seating **6%**	Peace and quiet **10%**	General tidiness and cleanliness **16%**	Quality of the natural environment **27%**	Upkeep of the park **33%**

Key Drivers Analysis:

r2=0.26 (the model explains 26% of the variation in the question "How would you rate the quality of the park overall?"). The model excludes variables with a high proportion of 'don't know' responses
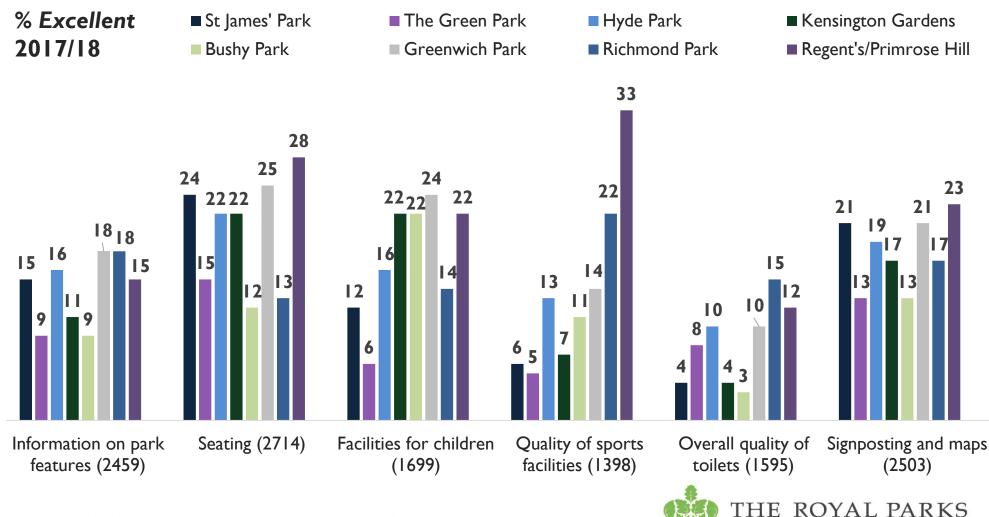
Environmental aspects are consistently rated less positively in certain parks, though no clear inner/outer London pattern

Q. Please could you tell me how you would rate each aspect by choosing an answer from this card?

% Excellent 2017/18

■ St James' Park ■ The Green Park ■ Hyde Park ■ Kensington Gardens
■ Bushy Park ■ Greenwich Park ■ Richmond Park ■ Regent's/Primrose Hill

Quality of the natural environment (2764): 54, 32, 45, 56, 52, 47, 63, 65

Upkeep of the park (2749): 49, 30, 42, 51, 38, 43, 48, 53

General tidiness and cleanliness (2766): 39, 29, 40, 47, 39, 45, 47, 52

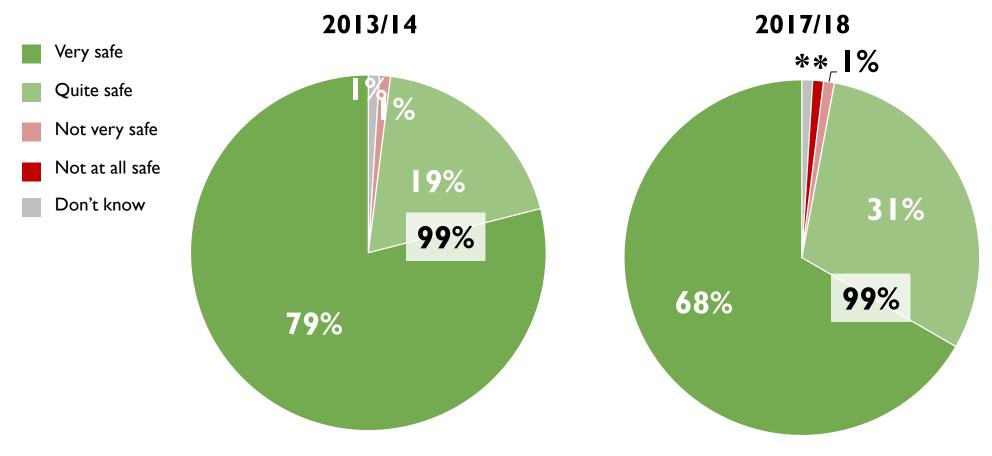**Peace & quiet (2758):** 23, 24, 34, 41, 34, 34, 34, 41

THE ROYAL PARKS

Large differences between parks also exist for ratings of facilities

Q. Please could you tell me how you would rate each aspect by choosing an answer from this card?

% *Excellent* 2017/18

- ■ St James' Park
- ■ The Green Park
- ■ Hyde Park
- ■ Kensington Gardens
- ■ Bushy Park
- ■ Greenwich Park
- ■ Richmond Park
- ■ Regent's/Primrose Hill

	St James' Park	The Green Park	Hyde Park	Kensington Gardens	Bushy Park	Greenwich Park	Richmond Park	Regent's/Primrose Hill
Information on park features (2459)	15	9	16	11	9	18	18	15
Seating (2714)	24	15	22	22	12	25	13	28
Facilities for children (1699)	12	6	16	22	22	24	14	22
Quality of sports facilities (1398)	6	5	13	7	11	14	22	33
Overall quality of toilets (1595)	4	8	10	4	3	10	15	12
Signposting and maps (2503)	21	13	19	17	13	21	17	23

THE ROYAL PARKS

Visitors continue to feel safe in the parks, although fewer feel *very* safe than in 2013/14

Q. How safe do you feel in this park generally?

2013/14

2017/18

Legend:
- Very safe
- Quite safe
- Not very safe
- Not at all safe
- Don't know

2013/14 pie chart: 79%, 19%, 1%, 1%, 99%

2017/18 pie chart: 68%, 31%, ** 1%, 99%

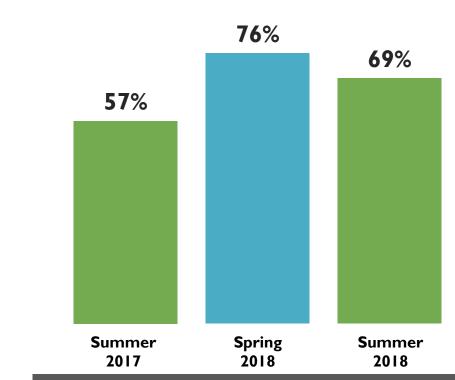THE ROYAL PARKS

Feelings of safety have recovered since the large fall in 2017 – but not yet at higher 2013/14 levels

Q. How safe do you feel in this park generally? **% Very safe**

75% — Summer 2013
80% — Spring 2014
83% — Summer 2014

57% — Summer 2017
76% — Spring 2018
69% — Summer 2018

Significant increase in 'very safe' between Summer 2013 and Spring 2014/Summer 2014.

Significant increase in 'very safe' between Summer 2017 and Spring 2018, and significant decrease in 'very safe' between Spring 2018 and Summer 2018.

THE ROYAL PARKS

Local visitors are among the groups more likely than overall to feel *very safe* in the parks

Q. How safe do you feel in this park generally?

More likely than overall to feel 'very safe' (68% in 2017/18):

- Frequent visitors (71%)

- Visitors living within half a mile (74%) and within two miles (74%) of the parks

- Older visitors; 45-54 (73%), 55-53 (75%), over 65s (77%)

- White visitors (73%)

- Those rating the parks excellent/good (68%)

Base: All visitors to the eight Royal Parks in London in 2017/18 (2,787).

THE ROYAL PARKS

But there are differences across parks in how safe visitors feel

Q. How safe do you feel in this park generally?

	Overall	St James' Park	The Green Park	Hyde Park	Kensington Gardens	Bushy Park	Greenwich Park	Richmond Park	Regent's/ Primrose Hill
'Very safe' 2017-18	68%	71%	(60%)	65%	68%	(62%)	68%	(74%)	(74%)
'Very safe' 2013-2014	79%	80%	(66%)	(87%)	(72%)	82%	84%	81%	83%

◯ ◯ = significantly higher/lower than overall

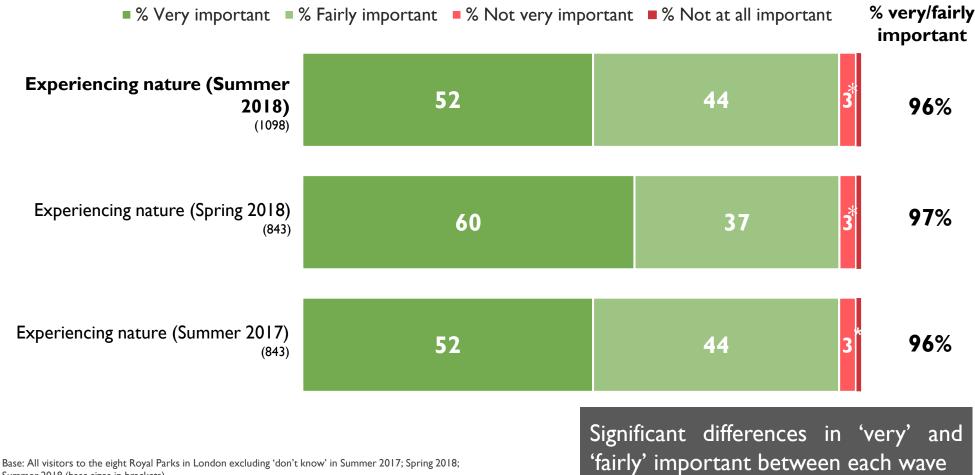THE ROYAL PARKS

History & heritage, nature and wellbeing

Most consider nature important to why they visit, especially in Spring

Q. To what extent do you consider the following to be important to you, or not, in terms of why you visit [this park]?

■ % Very important ■ % Fairly important ■ % Not very important ■ % Not at all important

% very/fairly important

Experiencing nature (Summer 2018)
(1098)

| 52 | 44 | 3* |

96%

Experiencing nature (Spring 2018)
(843)

| 60 | 37 | 3* |

97%

Experiencing nature (Summer 2017)
(843)

| 52 | 44 | 3* |

96%

Base: All visitors to the eight Royal Parks in London excluding 'don't know' in Summer 2017; Spring 2018; Summer 2018 (base sizes in brackets).

Significant differences in 'very' and 'fairly' important between each wave

A very similar pattern is seen for the importance of health and wellbeing

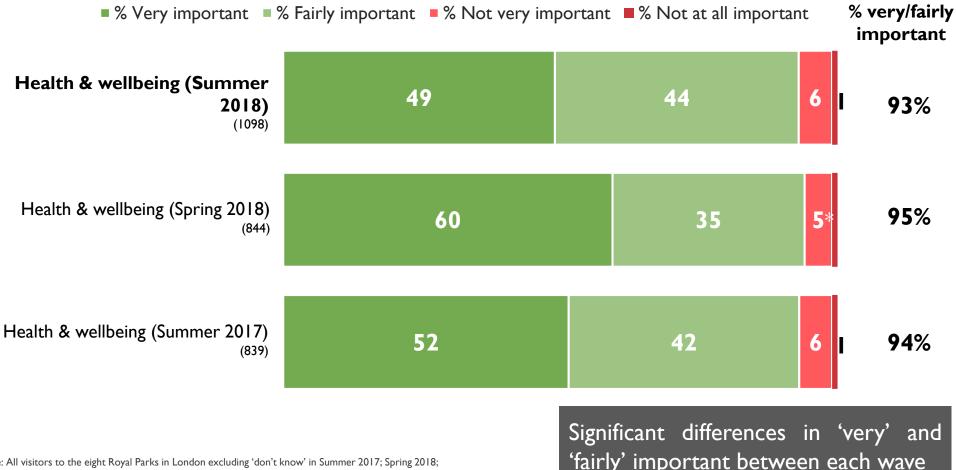**Q. To what extent do you consider the following to be important to you, or not, in terms of why you visit [this park]?**
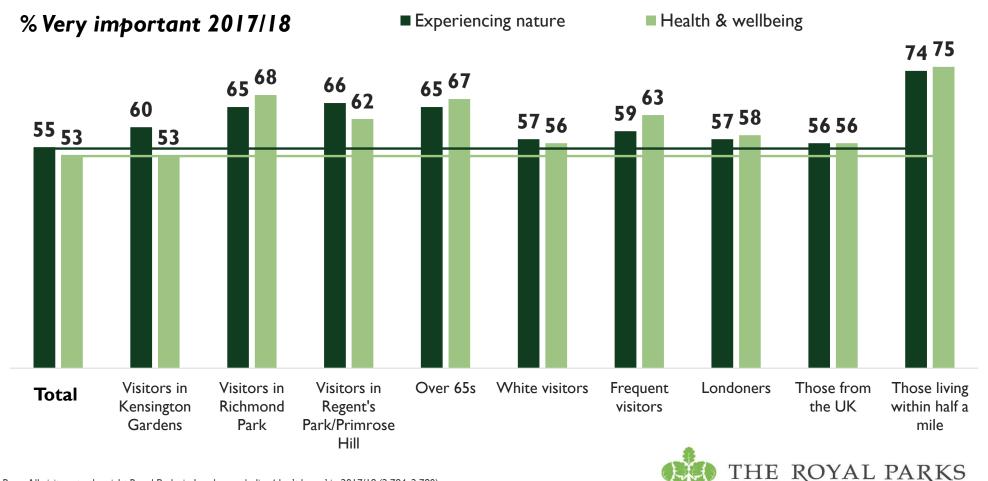
■ % Very important ■ % Fairly important ■ % Not very important ■ % Not at all important

% very/fairly important

	Very important	Fairly important	Not very important	% very/fairly important
Health & wellbeing (Summer 2018) (1098)	49	44	6	93%
Health & wellbeing (Spring 2018) (844)	60	35	5*	95%
Health & wellbeing (Summer 2017) (839)	52	42	6	94%

Base: All visitors to the eight Royal Parks in London excluding 'don't know' in Summer 2017; Spring 2018; Summer 2018 (base sizes in brackets).

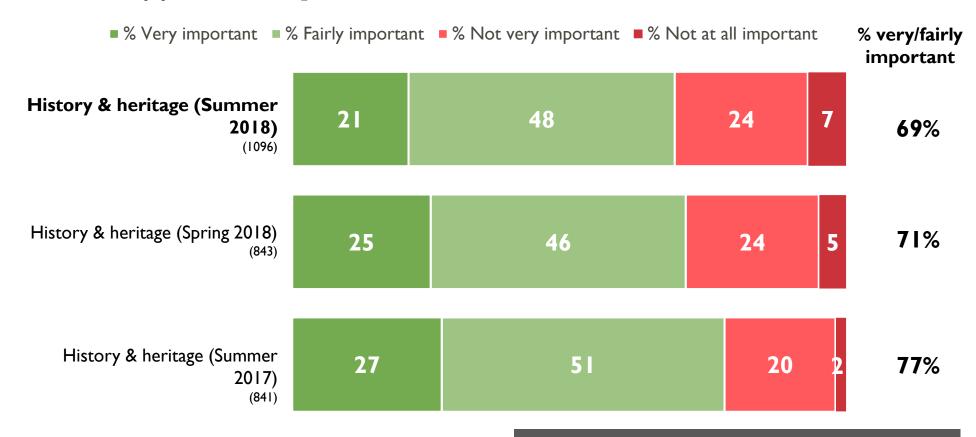Significant differences in 'very' and 'fairly' important between each wave

Locals and visitors to certain parks more likely to consider health & wellbeing and nature very important

Q. To what extent do you consider the following to be important to you, or not, in terms of why you visit [this park]? *Experiencing nature / health and wellbeing*

% Very important 2017/18

■ Experiencing nature　　■ Health & wellbeing

	Experiencing nature	Health & wellbeing
Total	55	53
Visitors in Kensington Gardens	60	53
Visitors in Richmond Park	65	68
Visitors in Regent's Park/Primrose Hill	66	62
Over 65s	65	67
White visitors	57	56
Frequent visitors	59	63
Londoners	57	58
Those from the UK	56	56
Those living within half a mile	74	75

THE ROYAL PARKS

Importance of history and heritage to visitors is high but lower than nature and wellbeing, and has declined

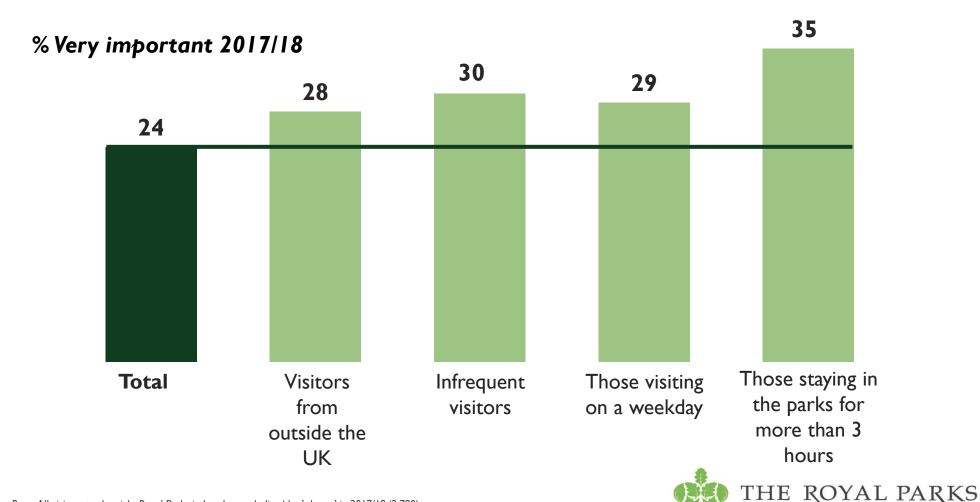**Q. To what extent do you consider the following to be important to you, or not, in terms of why you visit [this park]?**

■ % Very important ■ % Fairly important ■ % Not very important ■ % Not at all important

% very/fairly important

	% Very important	% Fairly important	% Not very important	% Not at all important	% very/fairly important
History & heritage (Summer 2018) (1096)	21	48	24	7	**69%**
History & heritage (Spring 2018) (843)	25	46	24	5	**71%**
History & heritage (Summer 2017) (841)	27	51	20	2	**77%**

Significant decrease in 'very/fairly important' between Summer 2017 and Summer 2018

Base: All visitors to the eight Royal Parks in London excluding 'don't know' in Summer 2017; Spring 2018; Summer 2018 (base sizes in brackets).

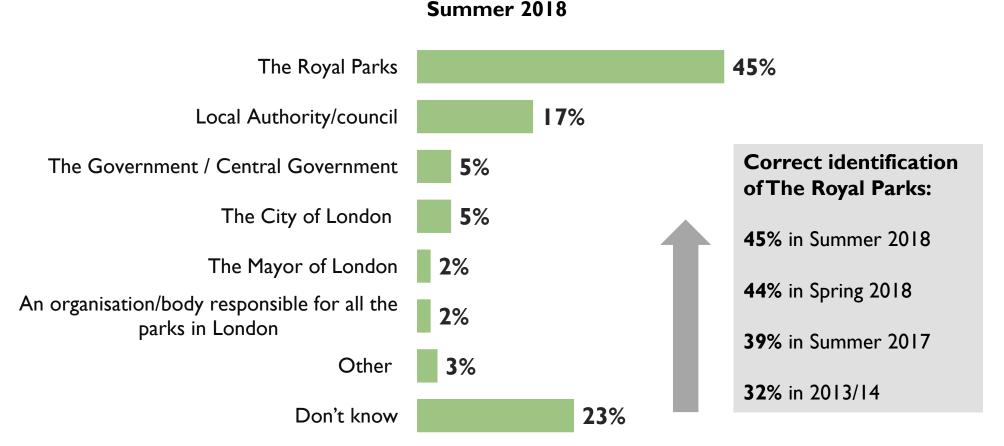# History and heritage appeal to different groups compared with nature and wellbeing

Q. To what extent do you consider the following to be important to you, or not, in terms of why you visit [this park]? *History and heritage*

% Very important 2017/18

Total	Visitors from outside the UK	Infrequent visitors	Those visiting on a weekday	Those staying in the parks for more than 3 hours
24	28	30	29	35

THE ROYAL PARKS

Awareness of and engagement with The Royal Parks

Awareness of The Royal Parks' role in managing the parks continues to grow

Q. As far as you know, who is responsible for managing [this park]?

Summer 2018

The Royal Parks	**45%**
Local Authority/council	**17%**
The Government / Central Government	**5%**
The City of London	**5%**
The Mayor of London	**2%**
An organisation/body responsible for all the parks in London	**2%**
Other	**3%**
Don't know	**23%**

Correct identification of The Royal Parks:

45% in Summer 2018

44% in Spring 2018

39% in Summer 2017

32% in 2013/14

THE ROYAL PARKS

Base: All visitors to the eight Royal Parks in London in 2013/14 (1699); Summer 2017 (843); Spring 2018 (845) and Summer 2018 (1099).
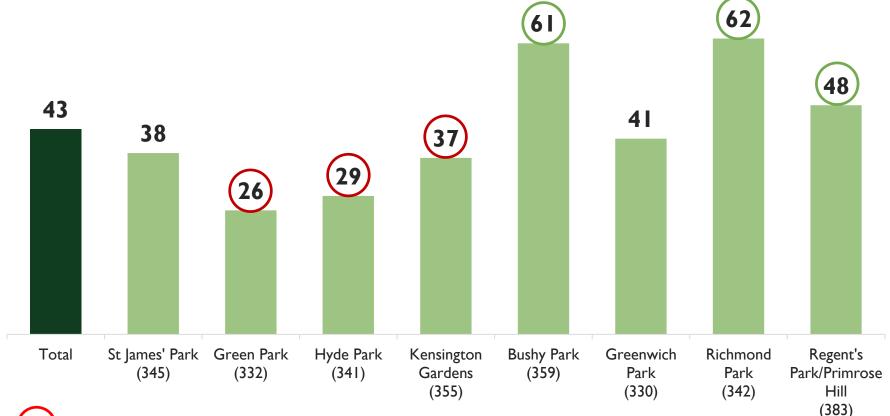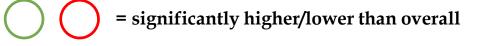
Visitors to outer London parks are more likely to identify your role than those in inner London parks

Q. As far as you know, who is responsible for managing [this park]?

% correctly identified The Royal Parks (2017/18)

Total	St James' Park (345)	Green Park (332)	Hyde Park (341)	Kensington Gardens (355)	Bushy Park (359)	Greenwich Park (330)	Richmond Park (342)	Regent's Park/Primrose Hill (383)
43	38	26	29	37	61	41	62	48

◯ ◯ = significantly higher/lower than overall

THE ROYAL PARKS

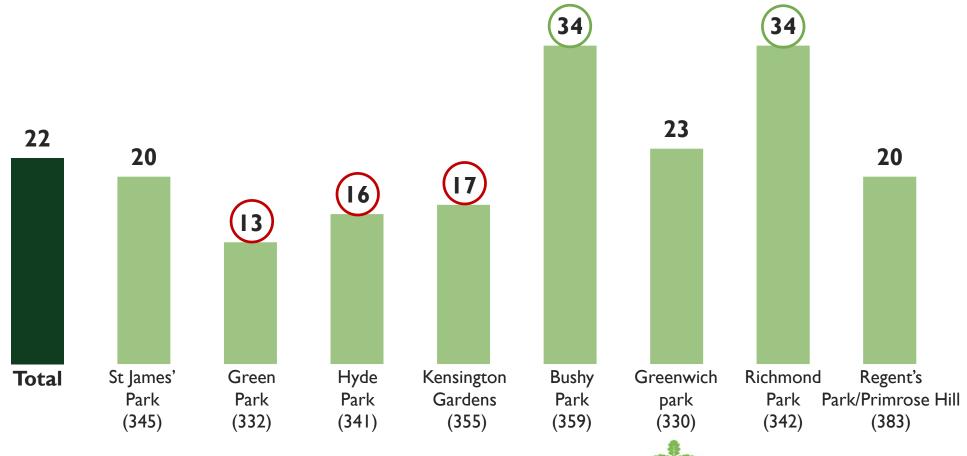Base: All visitors to the eight Royal Parks in London in 2017/18 (base sizes in brackets).

Visitors to outer London parks are more likely to know you are a charity than those in inner London parks

Q. To what extent were you aware or not that The Royal Parks is a charity?

% aware The Royal Parks is a charity (2017/18)

Total	St James' Park (345)	Green Park (332)	Hyde Park (341)	Kensington Gardens (355)	Bushy Park (359)	Greenwich park (330)	Richmond Park (342)	Regent's Park/Primrose Hill (383)
22	20	13	16	17	34	23	34	20

THE ROYAL PARKS

Visitor survey summary

Visitor survey: key findings

- The park environments continue to receive extremely positive ratings, and feelings of safety have risen since 2017.

- Declining ratings of facilities may be linked to expectations, or the impacts of increasing visitor numbers, though.

- Visitor's opinions of the parks are impacted by season, by events or occurrences in individual parks, but also by factors outside of those asked about in the survey – unpicking the drivers is difficult.

- Growing awareness of The Royal Parks does not extend to awareness of your charity status, and visitors' likelihood to donate and volunteer has fallen slightly.

- Those living near to the park and visiting frequently throughout the year are more likely to know about The Royal Parks' role and charity status compared with less frequent visitors living further away. They are also more likely to donate and volunteer.

THE ROYAL PARKS

Appendices

Survey of visitors to the parks (face-to-face methodology)

Survey wave	Number of interviews	Survey dates
Summer 2013	572	08 - 22 August 2013
Spring 2014	567	08 - 22 May 2014
Summer 2014	560	07 - 19 August 2014
Summer 2017	843	01 August - 05 September 2017
Spring 2018	845	01 May - 03 June 2018
Summer 2018	1099	01 August - 10 September 2018

Face-to-face interviewing, using a 'random stop' technique with pre-defined interview points (consistent wave on wave). Consistent methodology used since 2013, with switch from paper to tablets for 2017-2018 surveys.

THE ROYAL PARKS

Appendix 1: Visitors who are most likely to rate *excellent,* comparison by Spring/Summer

Legend: Total 17/18 | Summer 2017 | Spring 2018 | Summer 2018

Frequent visitors: 66, 61, 72, 66
Women: 61, 57, 69, 57
White visitors: 63, 54, 69, 63
Visitors from London: 60, 70, 70, 58
Visitors living nearby (within 2 miles): 66, 71, 70, 73
Visitors living nearby (within 0.5 miles): 72, 60, 69, 64
Older visitors (55-64): 64, 59, 64, 68
Older visitors (65+): 69, 67, 73, 65