



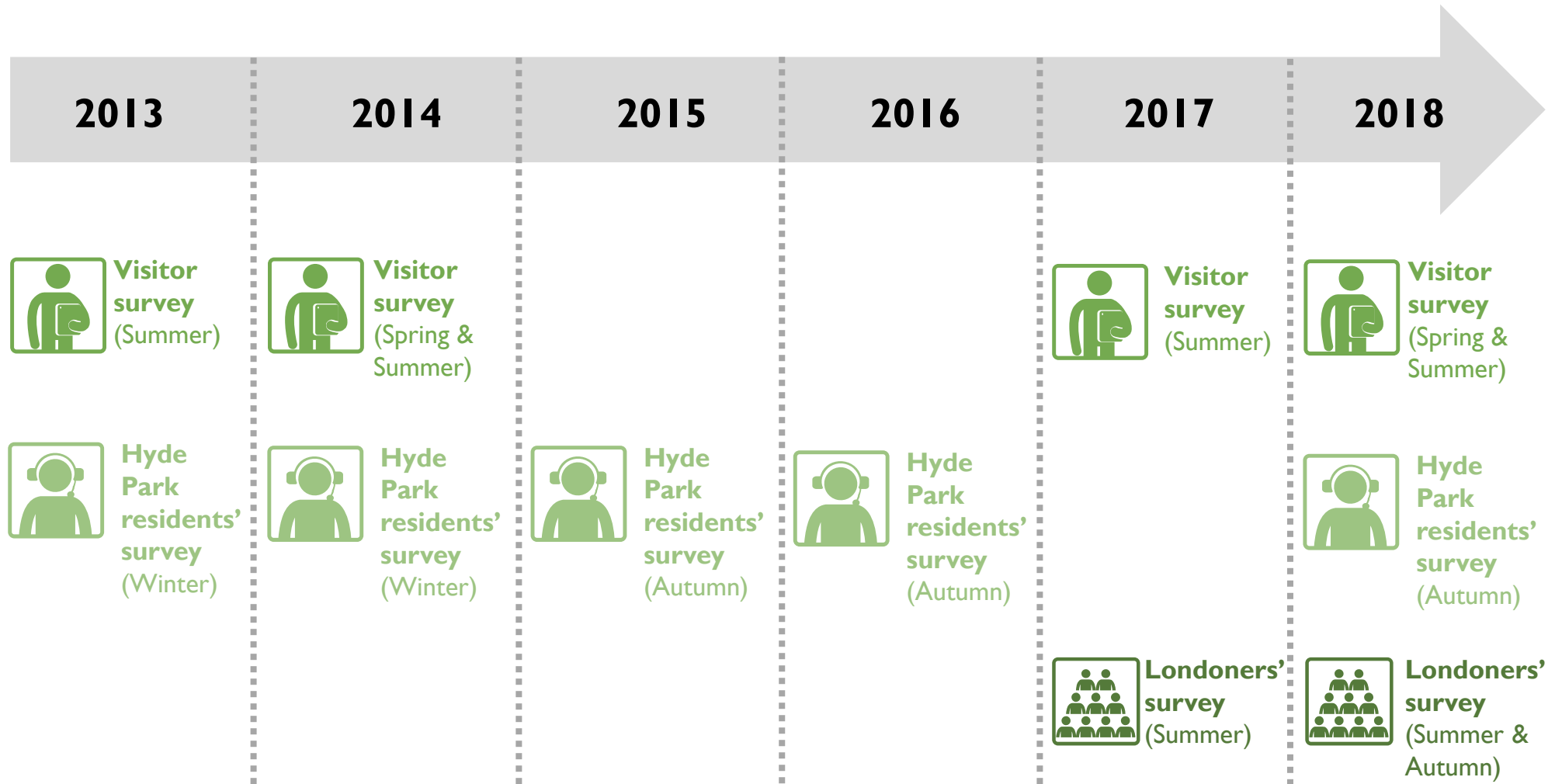
The Royal Parks

Research Programme 2013-18

November 2018



Research programme 2013-18



THE ROYAL PARKS



Research with visitors



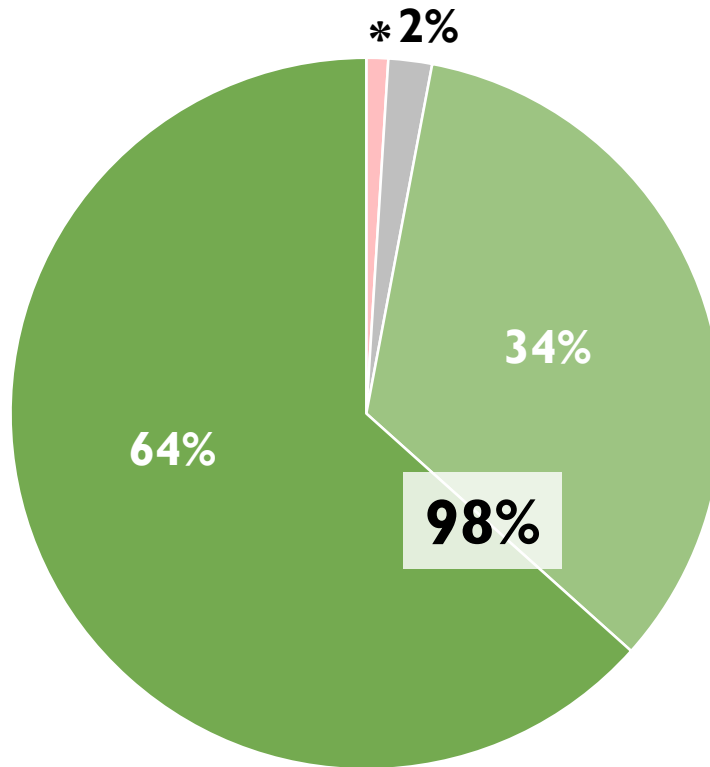
Visitors' views of the parks



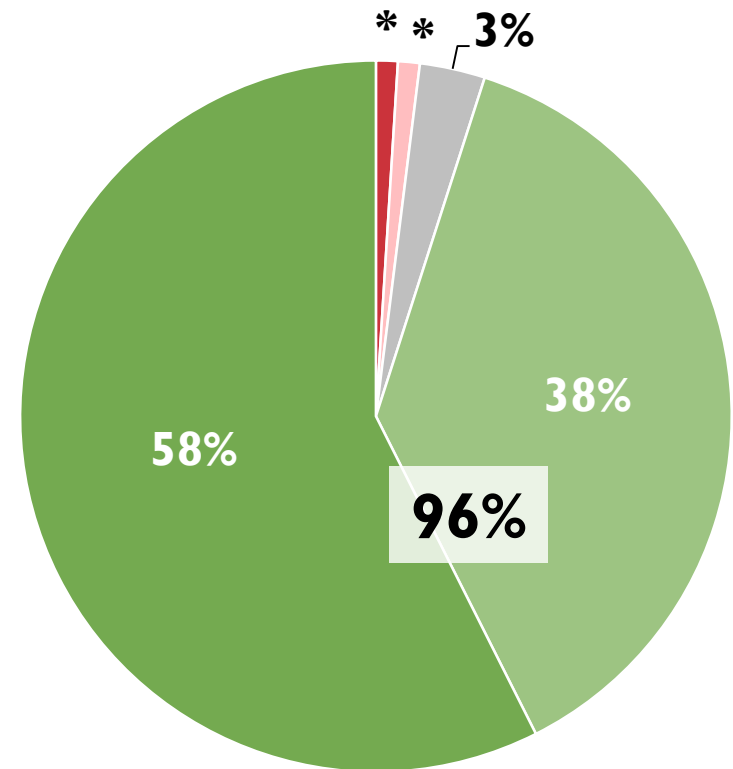
Visitors are extremely positive about the parks, although *excellent* ratings have fallen slightly

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

2013/14



2017/18



Base: All visitors to the eight Royal Parks in London excluding 'don't know' in 2013/14 (1682) and 2017/18 (2782).

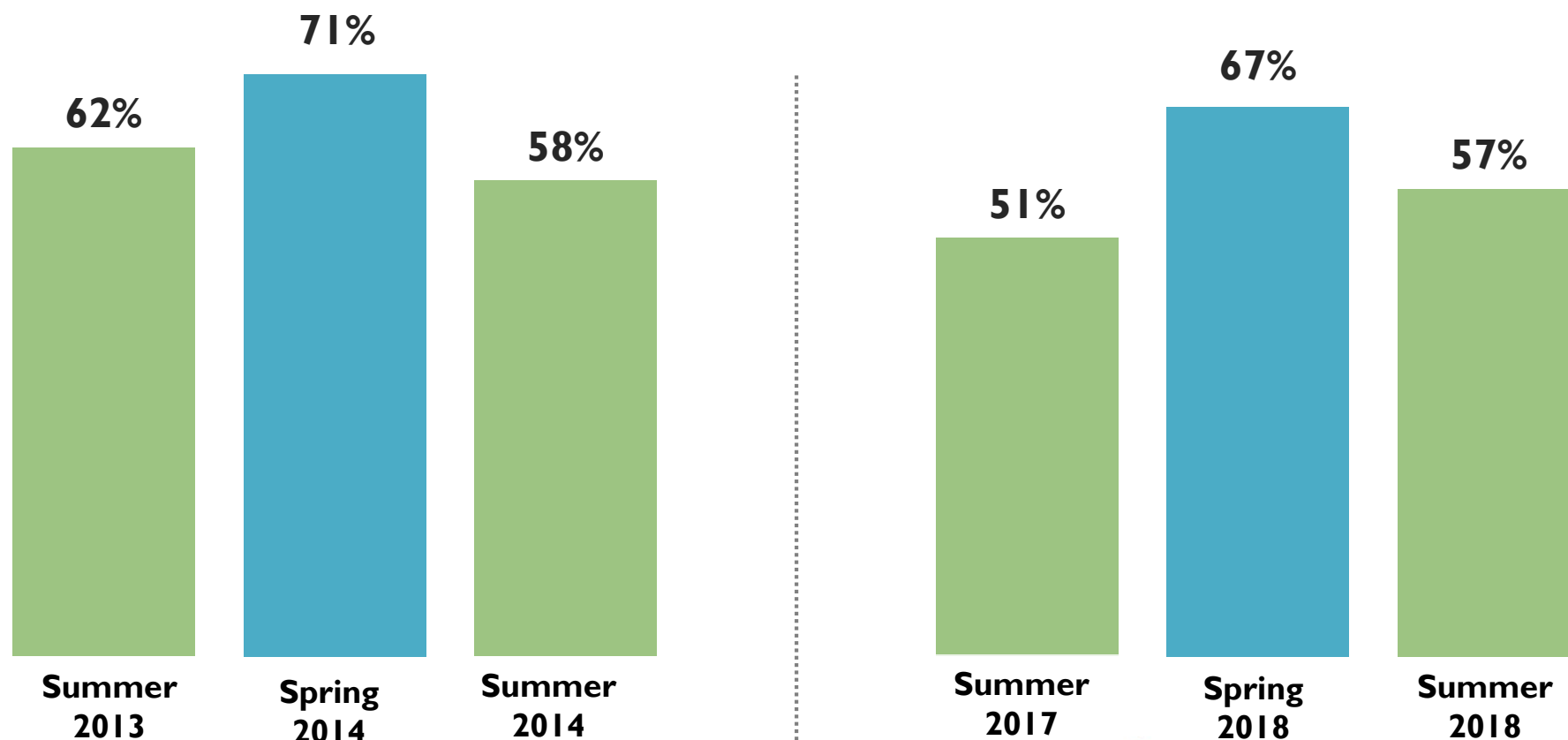


THE ROYAL PARKS

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*



Base: All visitors to the eight Royal Parks in London excluding 'don't know' in Summer 2013 (564); Spring 2014 (561); Summer 2014 (557); Summer 2017 (840); Spring 2018 (844); Summer 2018 (1098)



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 (1,099).



THE ROYAL PARKS

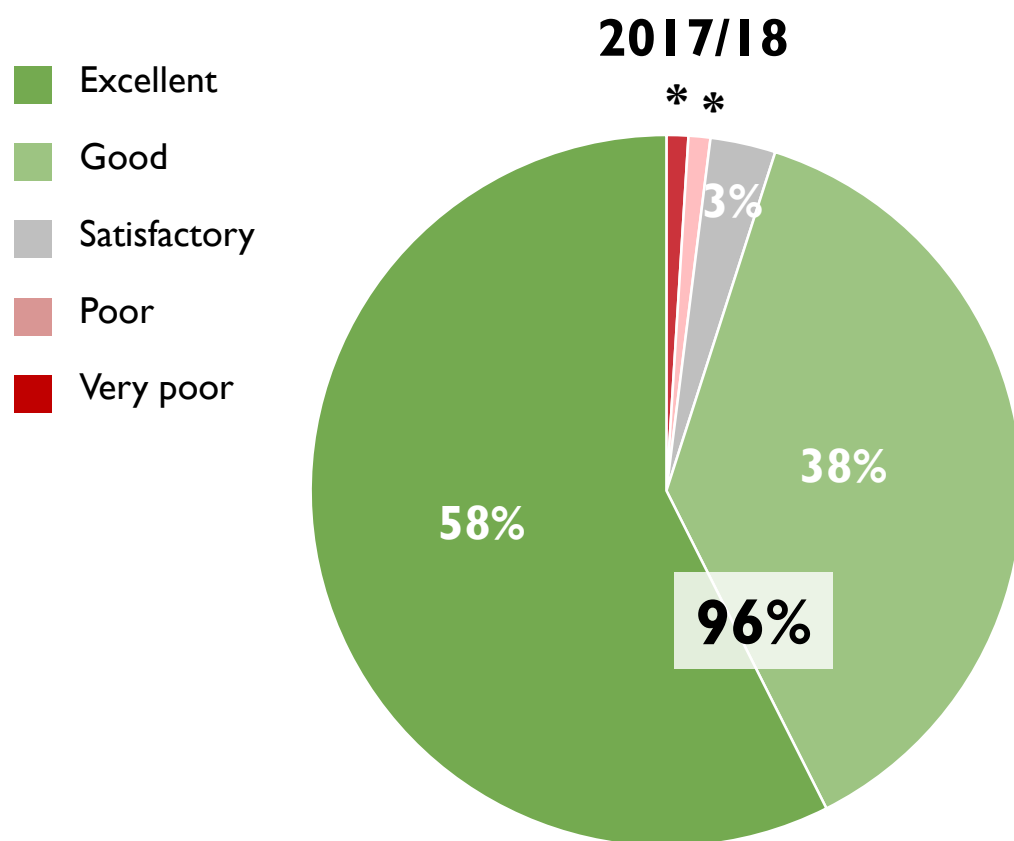
Variations in sample profile are unlikely to fully explain seasonal differences in ratings (2)

	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%	-



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?







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.



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%

Base: All visitors to the eight Royal Parks in London in 2013/14 (1,699); Summer 2017 (843); Spring 2018 (845); Summer 2018 (1,099).



THE ROYAL PARKS

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

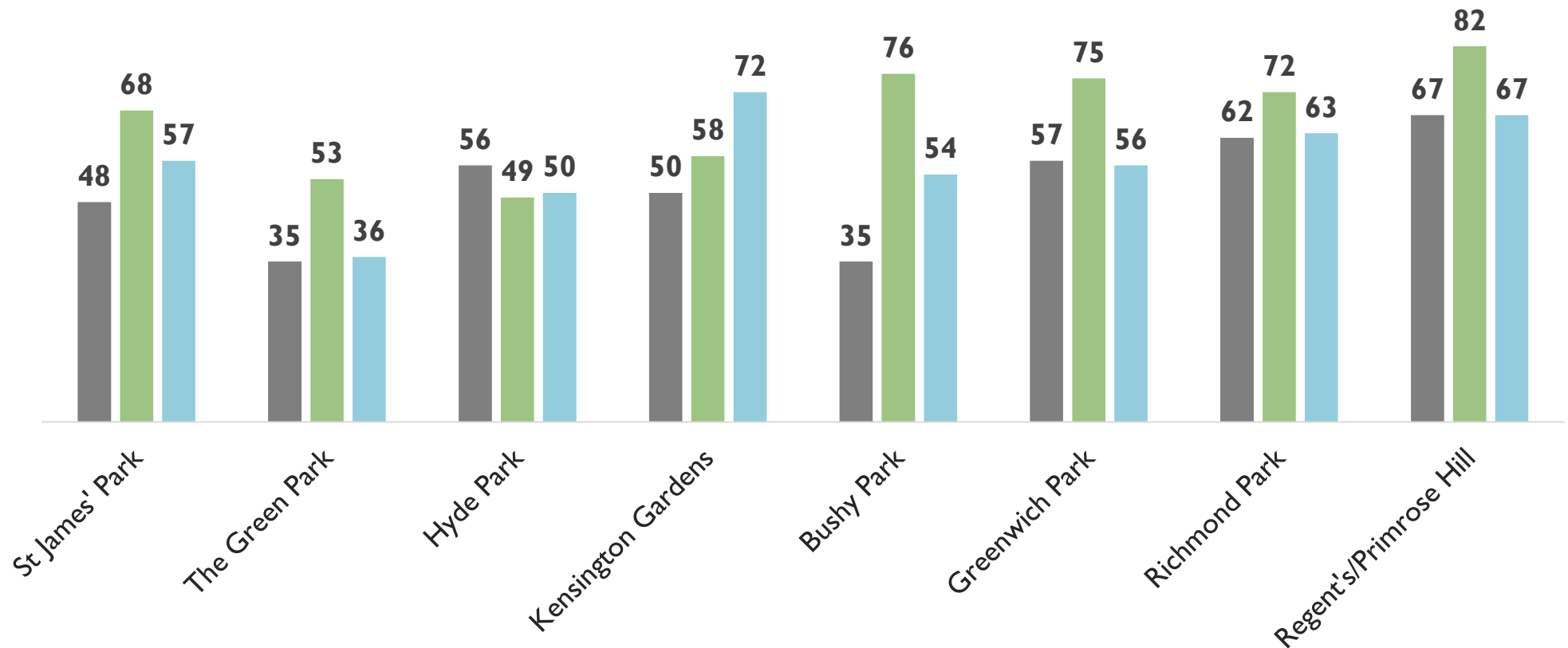
Q. How would you rate the quality of the park overall?

% **Excellent**

■ Summer 2017

■ Spring 2018

■ Summer 2018



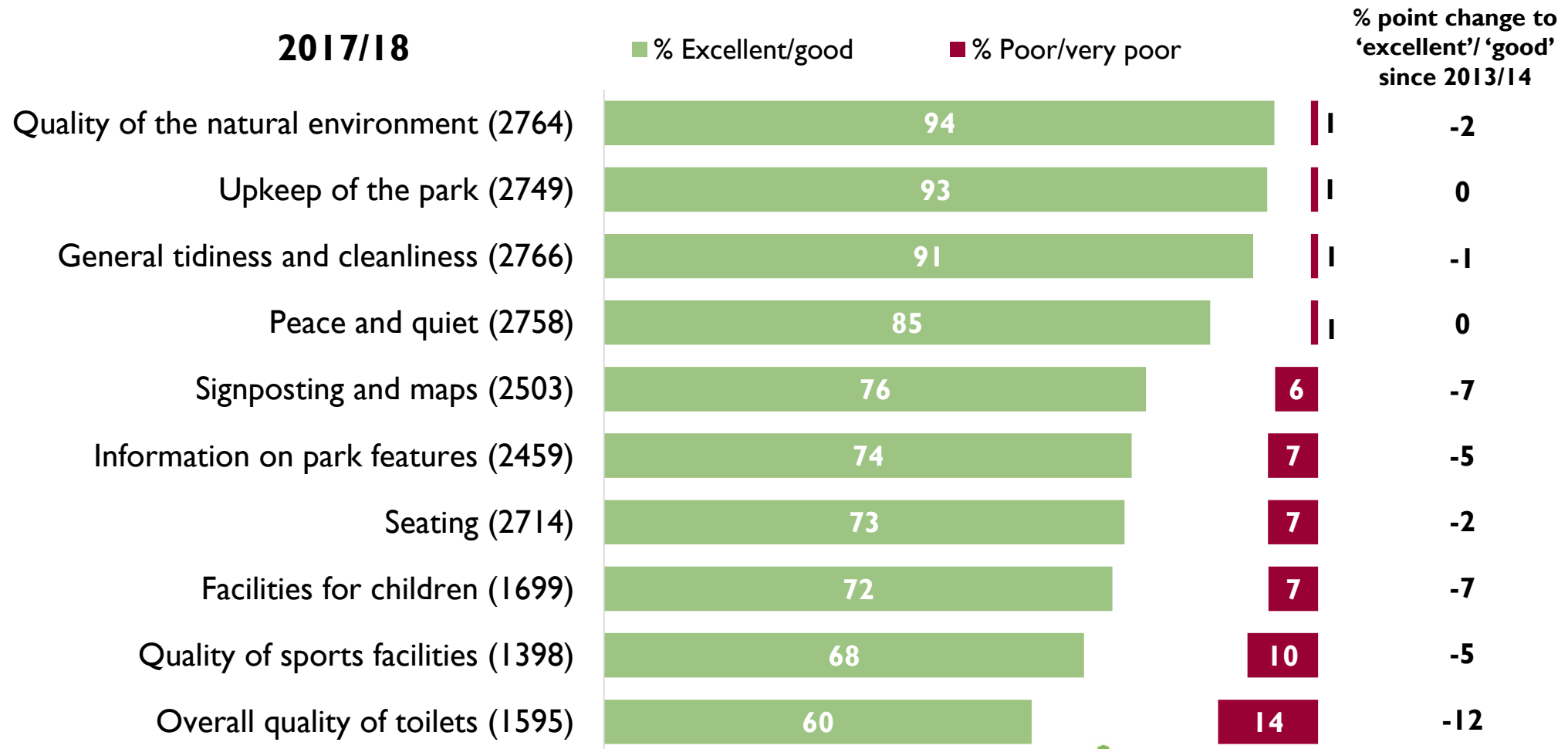
Base: All visitors to the eight Royal Parks in London excluding 'don't know' in 2013/14 (1,682); Summer 2017 (840); Spring 2018 (844) and Summer 2018 (1,098).



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?



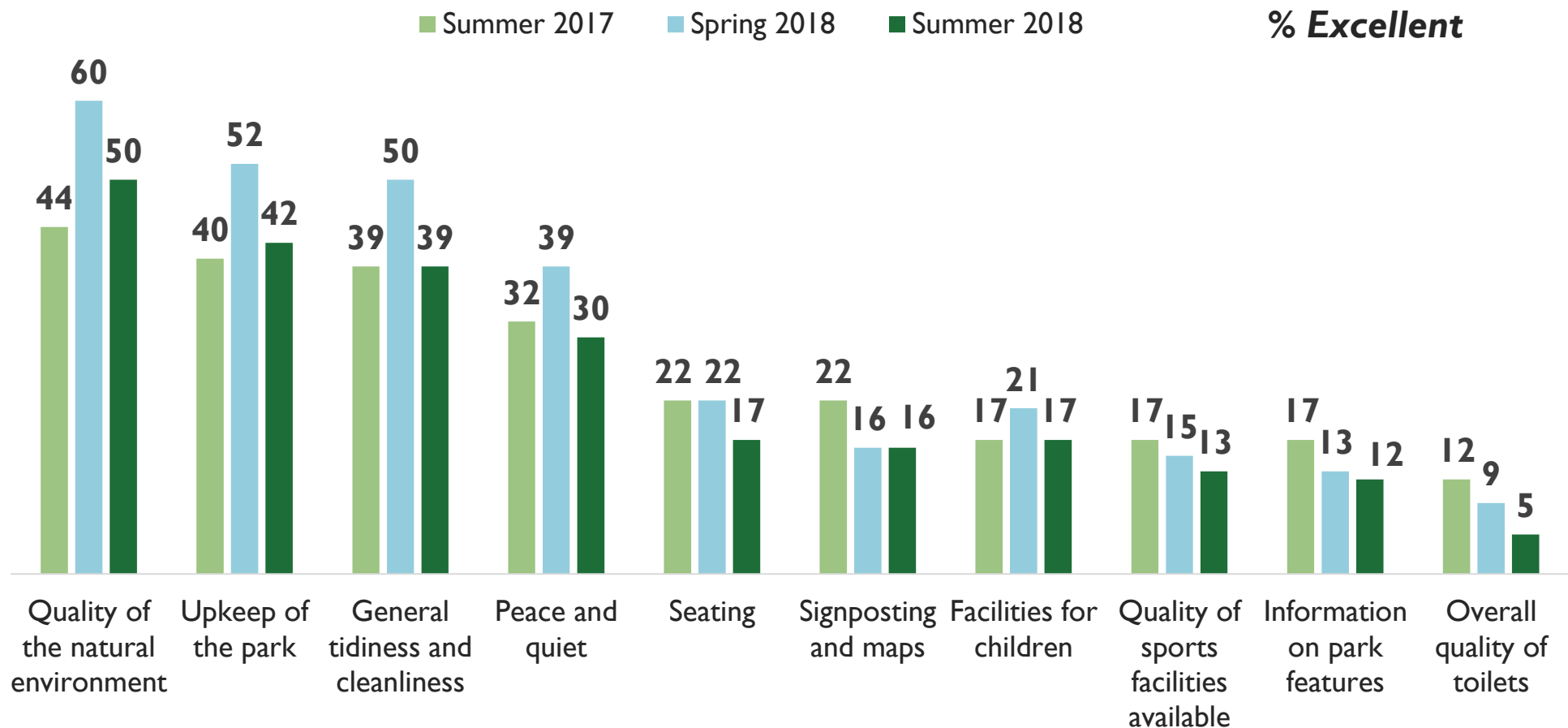
Base: All visitors in 2017/18 who have rated the quality of the parks excluding 'no opinion/not relevant' (base sizes in brackets).



THE ROYAL PARKS

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

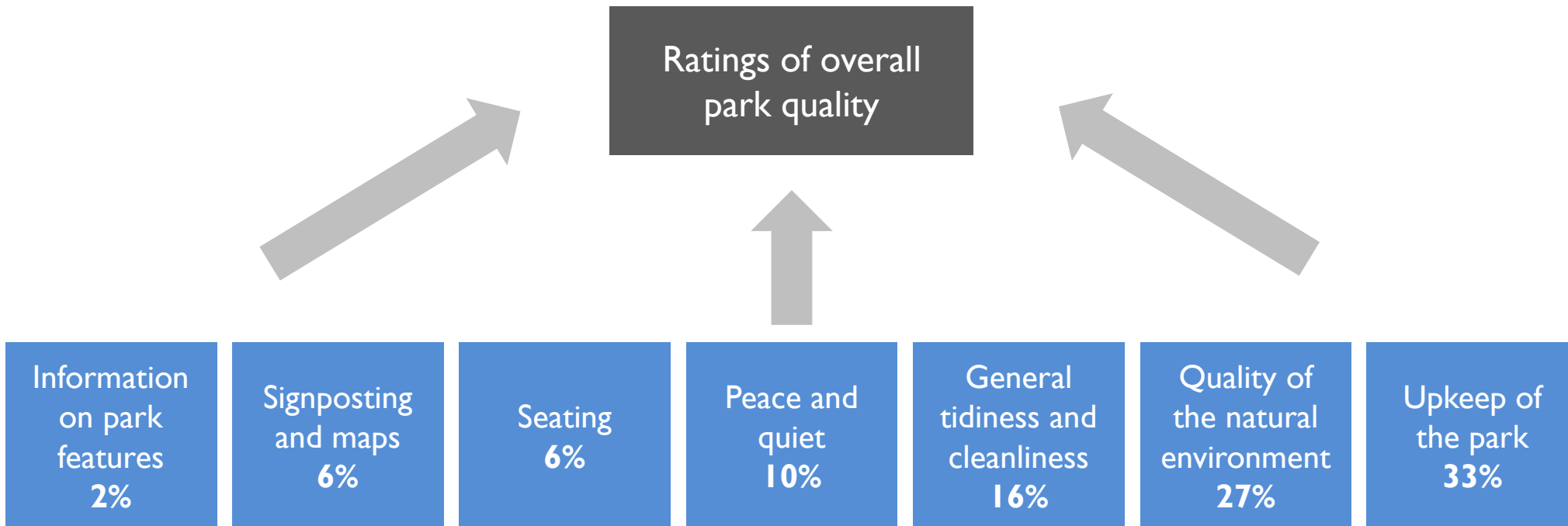
Q. Please could you tell me how you would rate each aspect by choosing an answer from this card?



Base: All visitors in Summer 2017 (843); Spring 2018 (845); Summer 2018 (1,099) excluding 'no opinion/not relevant' (base sizes differ).



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



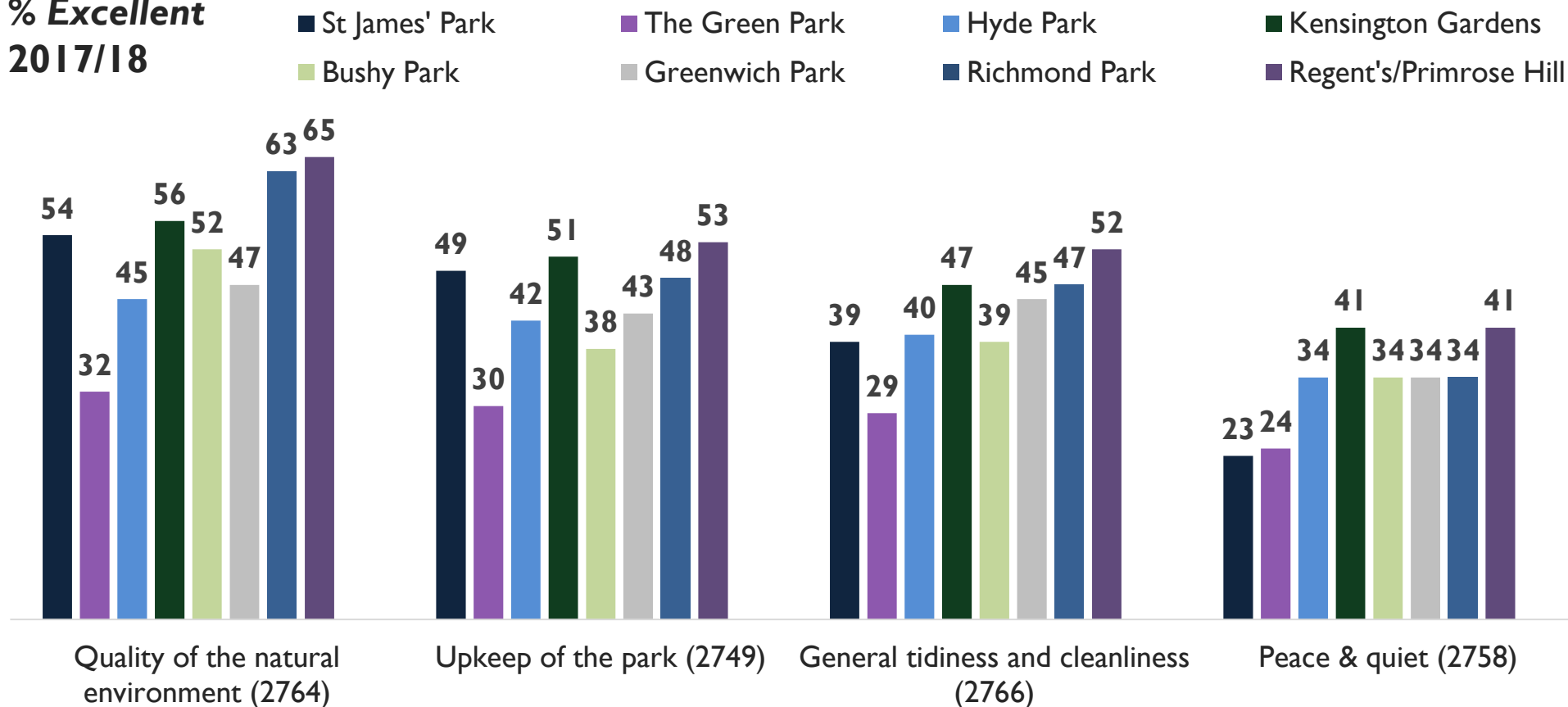
Key Drivers Analysis:

$r^2=0.26$ (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



Base: All visitors in 2017/18 who have rated the quality of the parks excluding 'no opinion/not relevant' (base sizes in brackets).



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

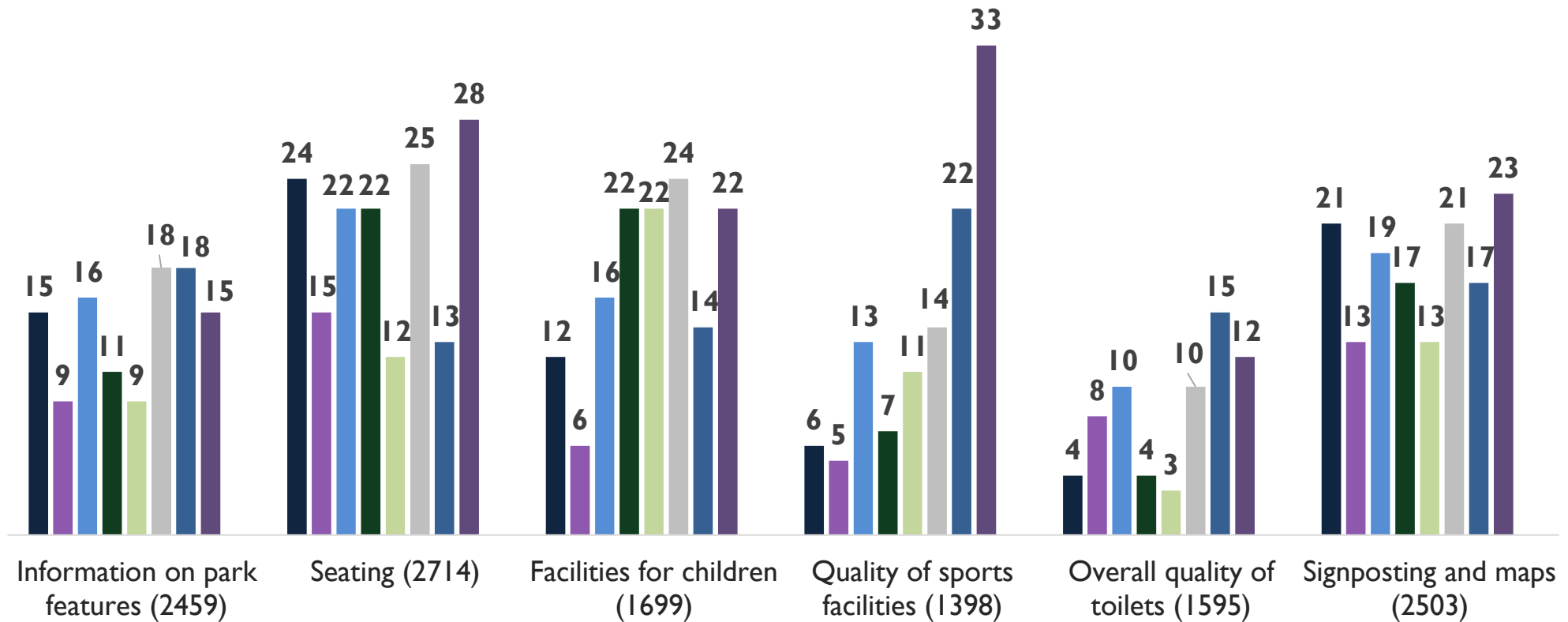
■ Kensington Gardens

■ Bushy Park

■ Greenwich Park

■ Richmond Park

■ Regent's/Primrose Hill



Base: All visitors in 2017/18 who have rated the quality of the parks excluding 'no opinion/not relevant' (base sizes in brackets).



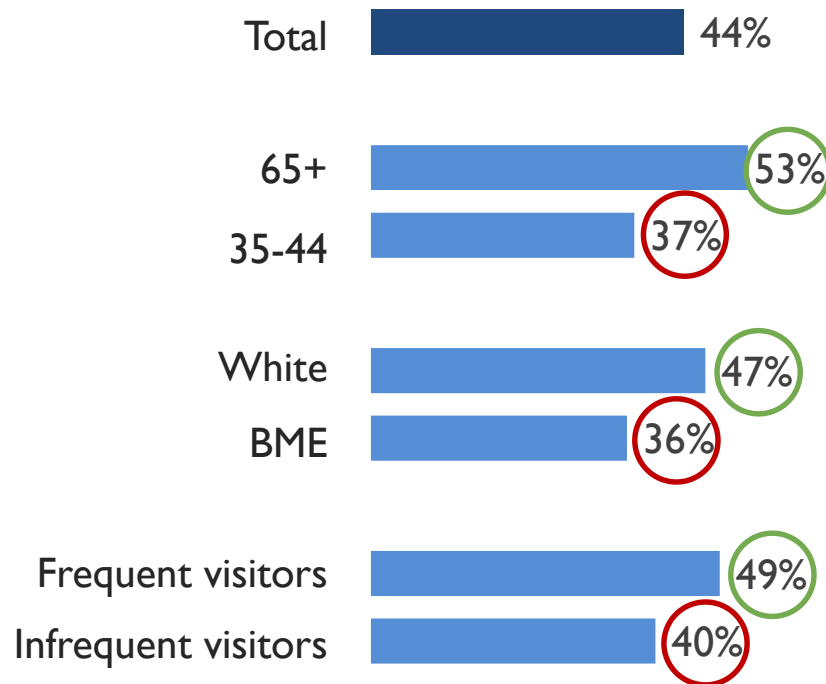
THE ROYAL PARKS

The Royal Parks Charitable Object 1

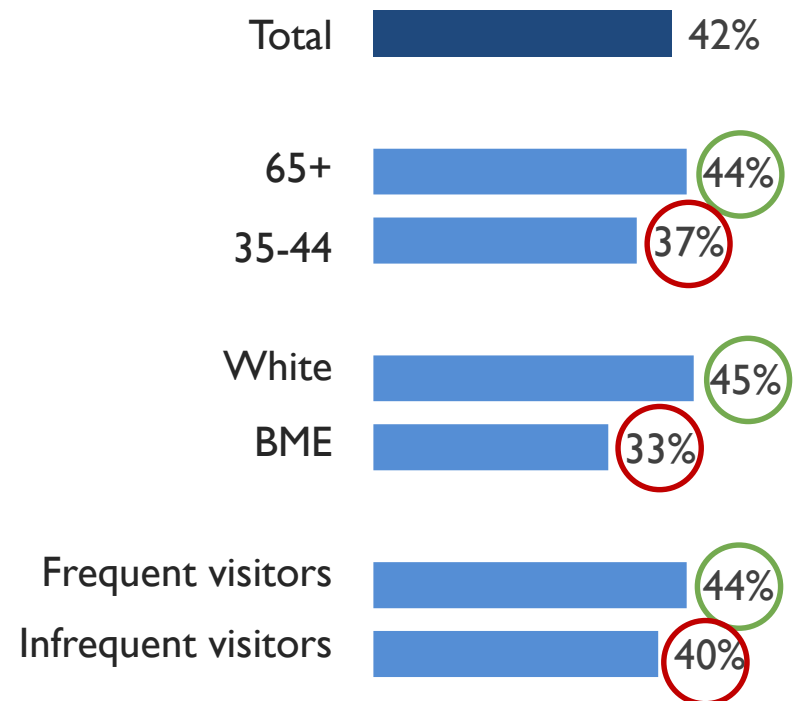
To **protect, conserve, maintain and care** for the Royal Parks, including their natural and designed landscapes and built environment, to a high standard consistent with their historic, horticultural, environmental and architectural importance

**% Excellent
2017/18**

Rating of upkeep



Rating of tidiness/cleanliness



  = significantly higher/lower than overall



THE ROYAL PARKS

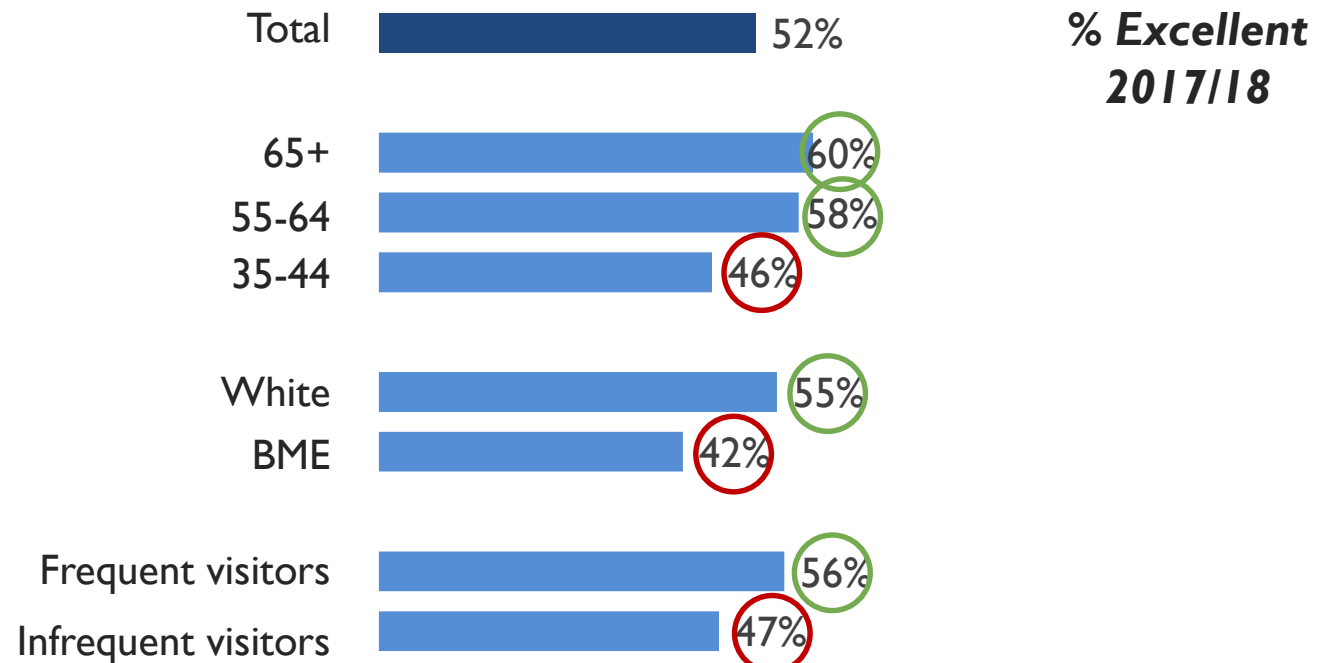
Base: All visitors to the eight Royal Parks in London excluding 'No opinion/not relevant' in 2017/18.

The Royal Parks Charitable Object 1 and 3

1: To **protect, conserve, maintain and care** for the Royal Parks, including their natural and designed landscapes and built environment, to a **high standard** consistent with their historic, horticultural, environmental and architectural importance

3: To maintain and develop the **biodiversity** of the Royal Parks, including the **protection of their wildlife and natural environment**, together with **promoting sustainability** in the management and use of the Royal Parks;

Quality of the natural environment



  = significantly higher/lower than overall



THE ROYAL PARKS

Base: All visitors to the eight Royal Parks in London excluding 'No opinion/not relevant' in 2017/18.

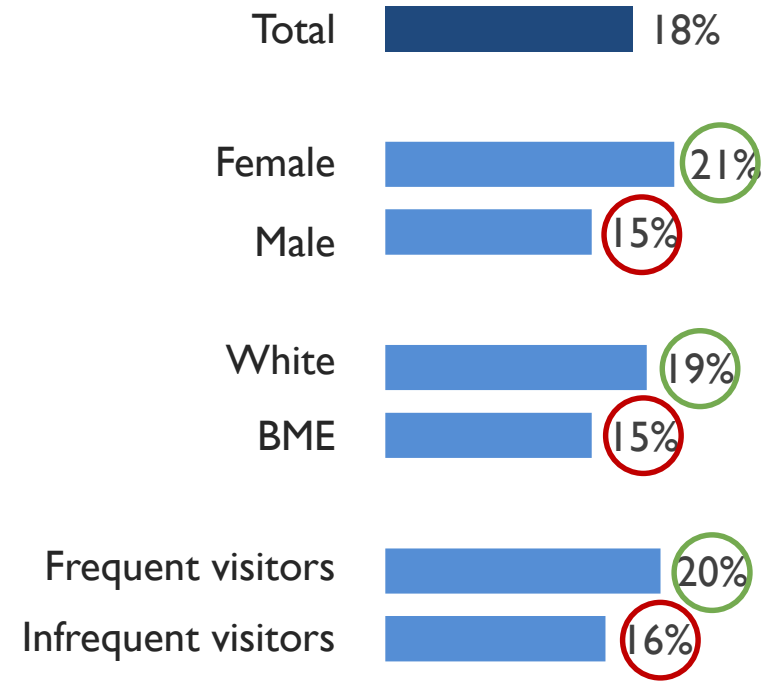
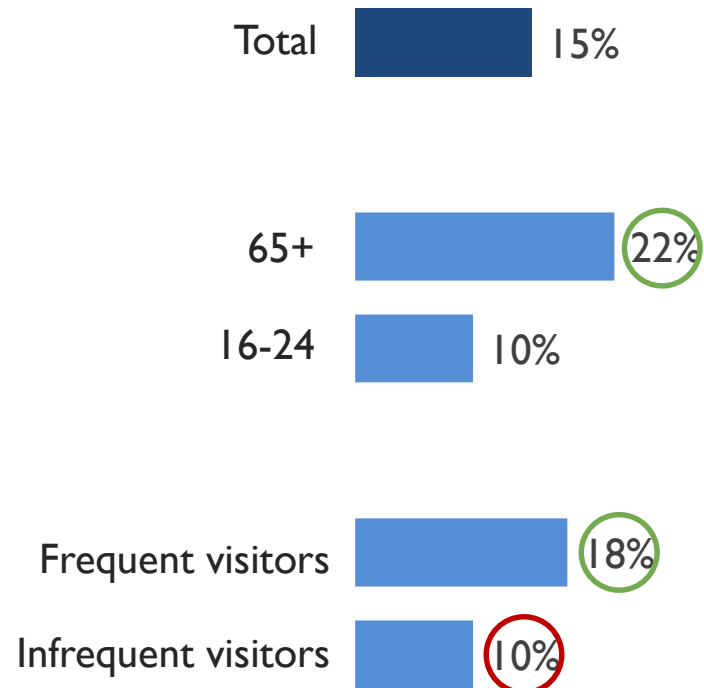
The Royal Parks Charitable Object 2

To promote the use and enjoyment of the Royal Parks for **public recreation, health and well-being** including through the provision of **sporting and cultural activities and events** which effectively advance the objects

Quality of sports facilities available

% *Excellent*
2017/18

Rating of facilities for children



  = significantly higher/lower than overall

Base: All visitors to the eight Royal Parks in London excluding 'No opinion/not relevant' in 2017/18.



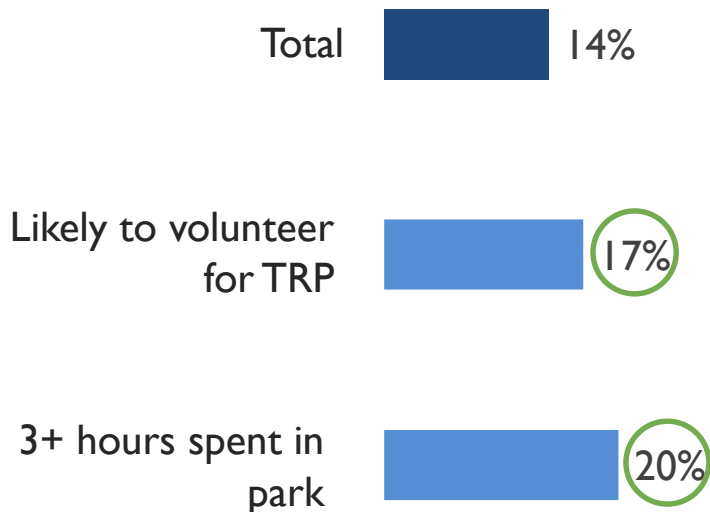
THE ROYAL PARKS

The Royal Parks Charitable Object 4

To support the advancement of **education** by promoting **public understanding** of the **history, culture, heritage and natural environment** of the Royal Parks and (by way of comparison) elsewhere

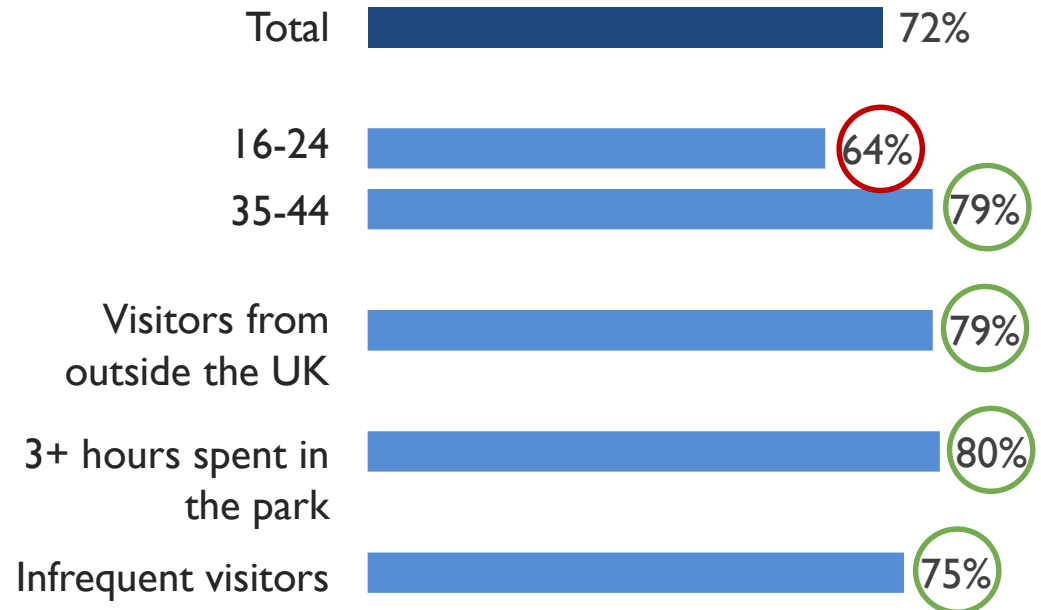
Rating of information on park features, e.g. history, nature

% Excellent 2017/18



Learning about history & heritage

% Important 2017/18



  = significantly higher/lower than overall



THE ROYAL PARKS

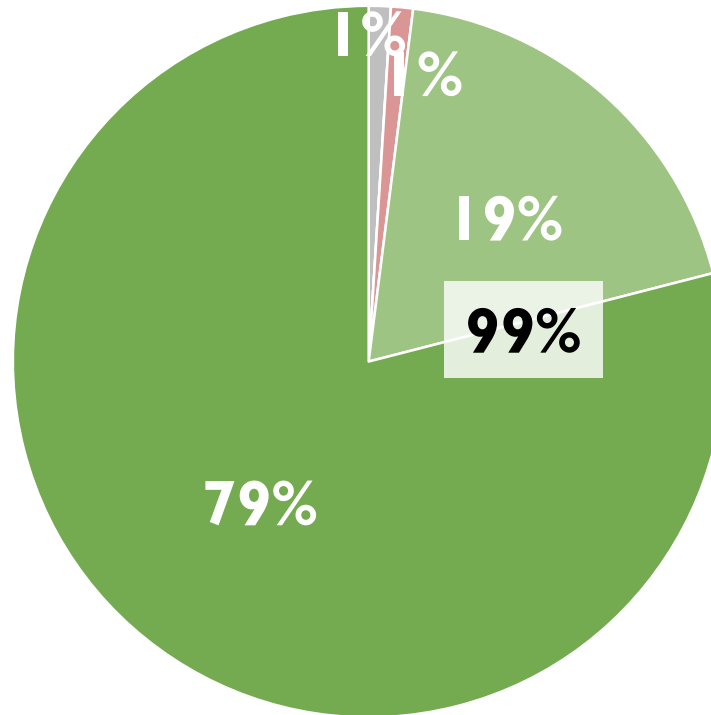
Base: All visitors to the eight Royal Parks in London excluding 'No opinion/not relevant' in 2017/18.

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

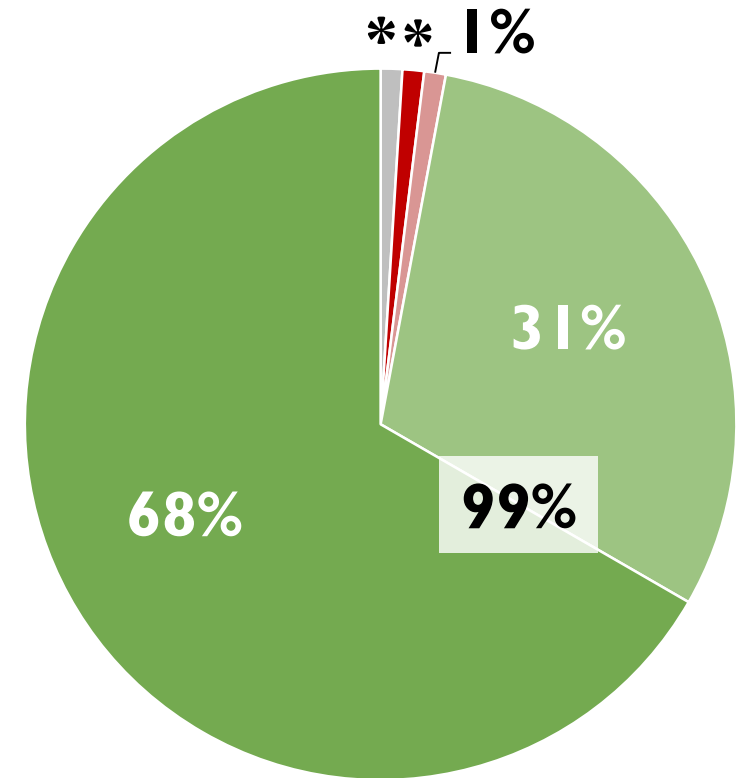
Q. How safe do you feel in this park generally?

2013/14

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



2017/18



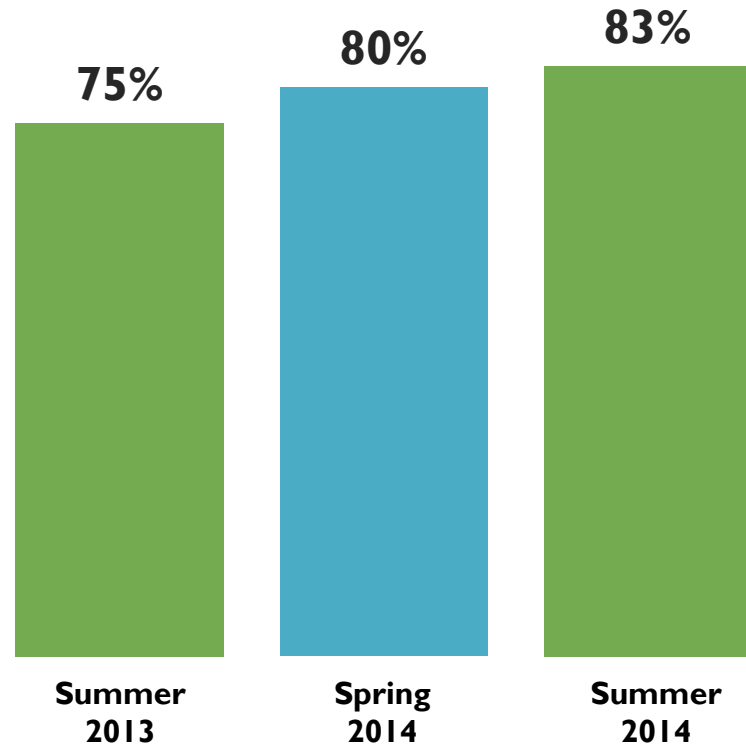
Base: All visitors to the eight Royal Parks in London in 2013/14 (1,699) and 2017/18 (2,787).



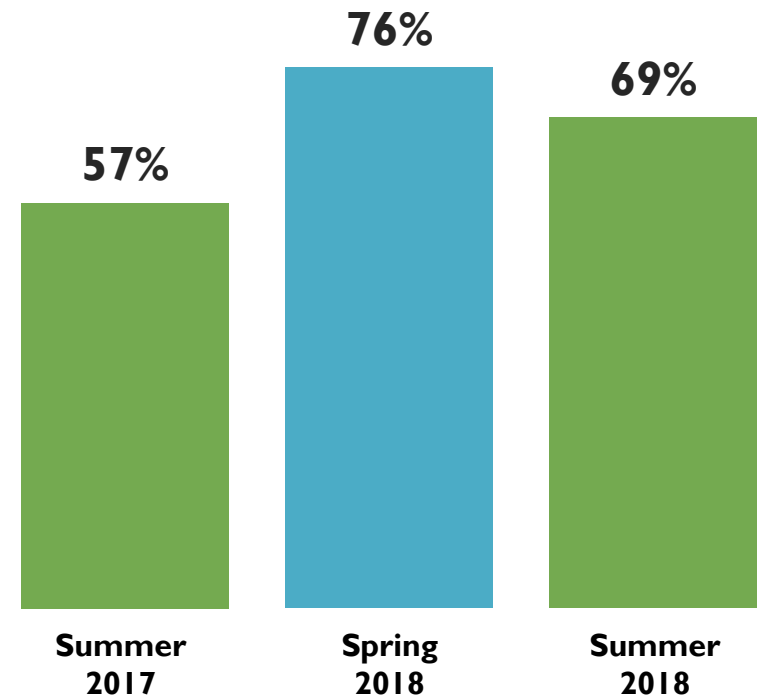
THE ROYAL PARKS

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*



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.



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%)

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

Base: All visitors to the eight Royal Parks in London in 2013/14 (1,699); Summer 2017 (843); Spring 2018 (845) and Summer 2018 (1,099).



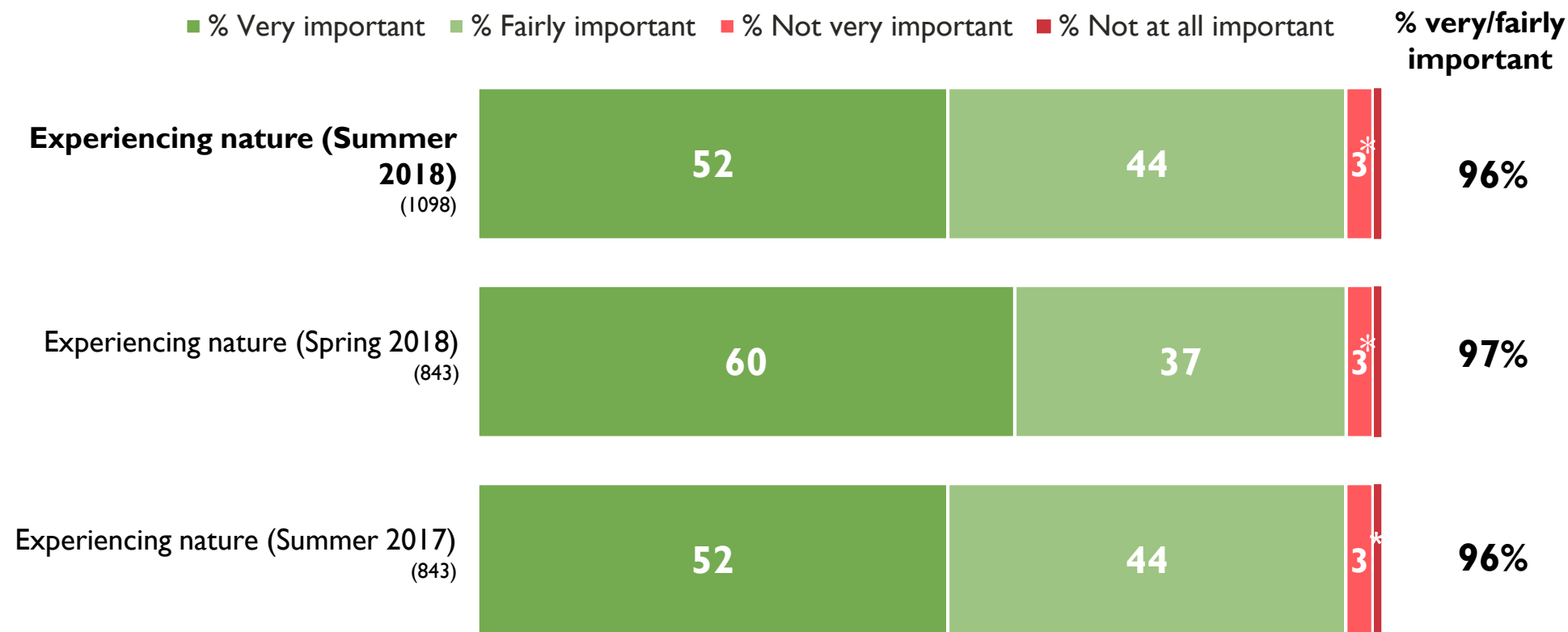
THE ROYAL PARKS

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]?

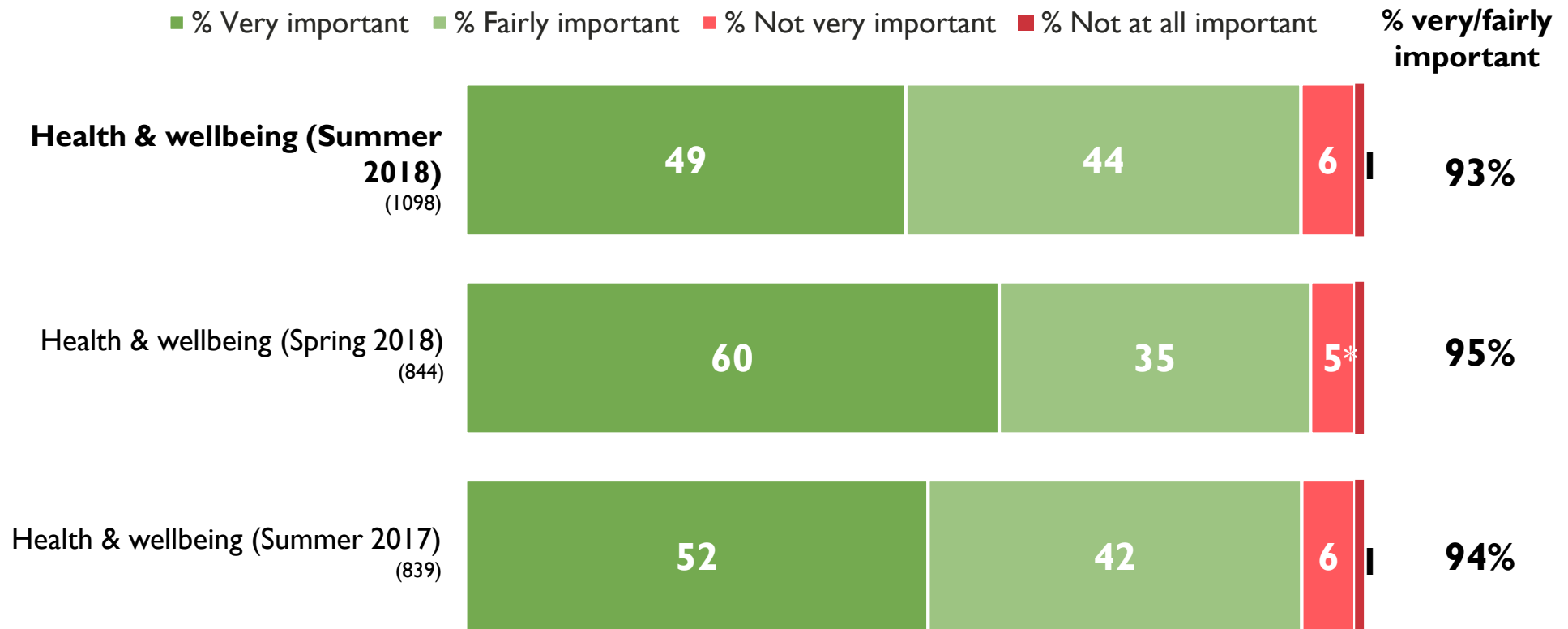


Base: All visitors to the eight Royal Parks in London excluding 'don't know' in Summer 2017; Spring 2018; Summer 2018 (base sizes in brackets).

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]?



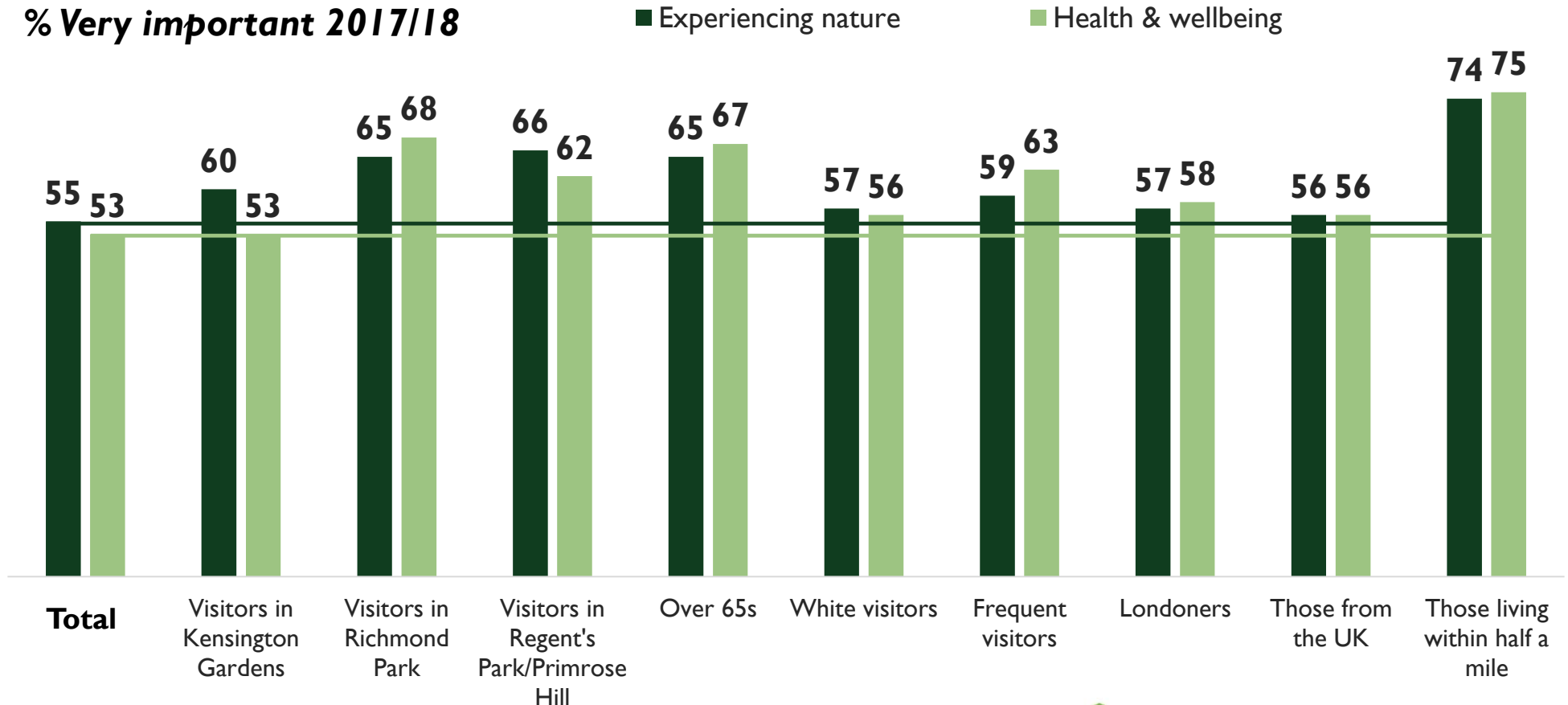
Base: All visitors to the eight Royal Parks in London excluding 'don't know' in Summer 2017; Spring 2018; Summer 2018 (base sizes in brackets).

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



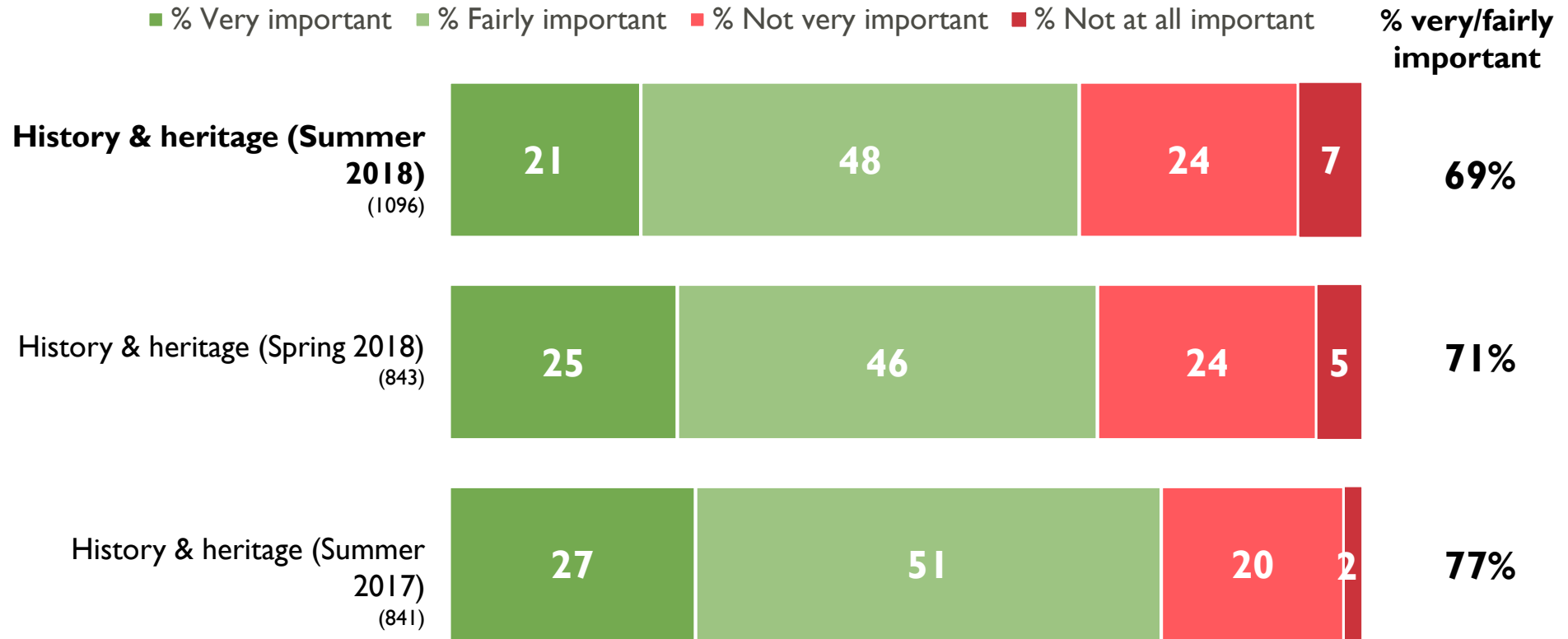
Base: All visitors to the eight Royal Parks in London excluding 'don't know' in 2017/18 (2,784; 2,780).



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]?



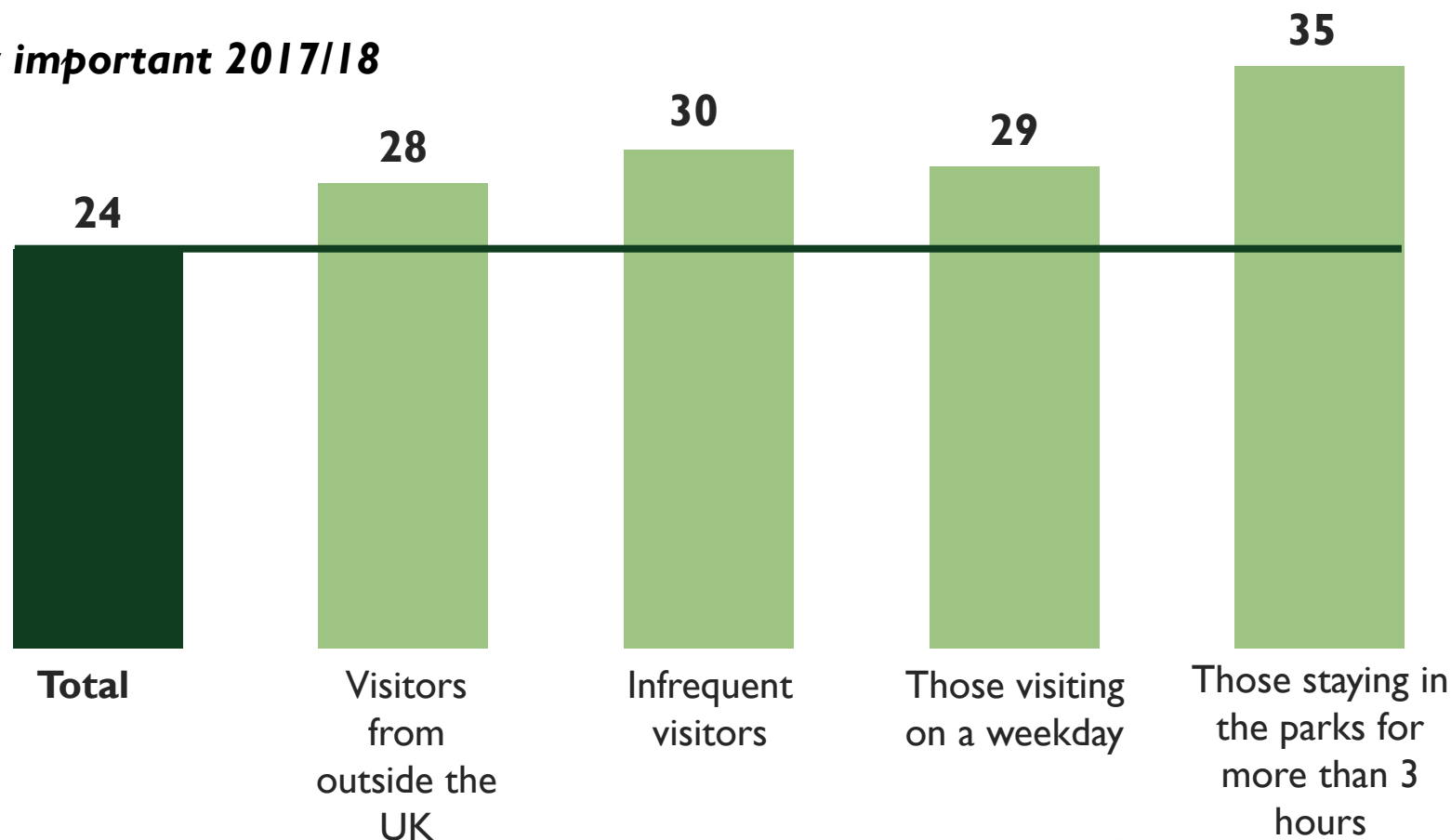
Base: All visitors to the eight Royal Parks in London excluding 'don't know' in Summer 2017; Spring 2018; Summer 2018 (base sizes in brackets).

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

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



Base: All visitors to the eight Royal Parks in London excluding 'don't know' in 2017/18 (2,780).



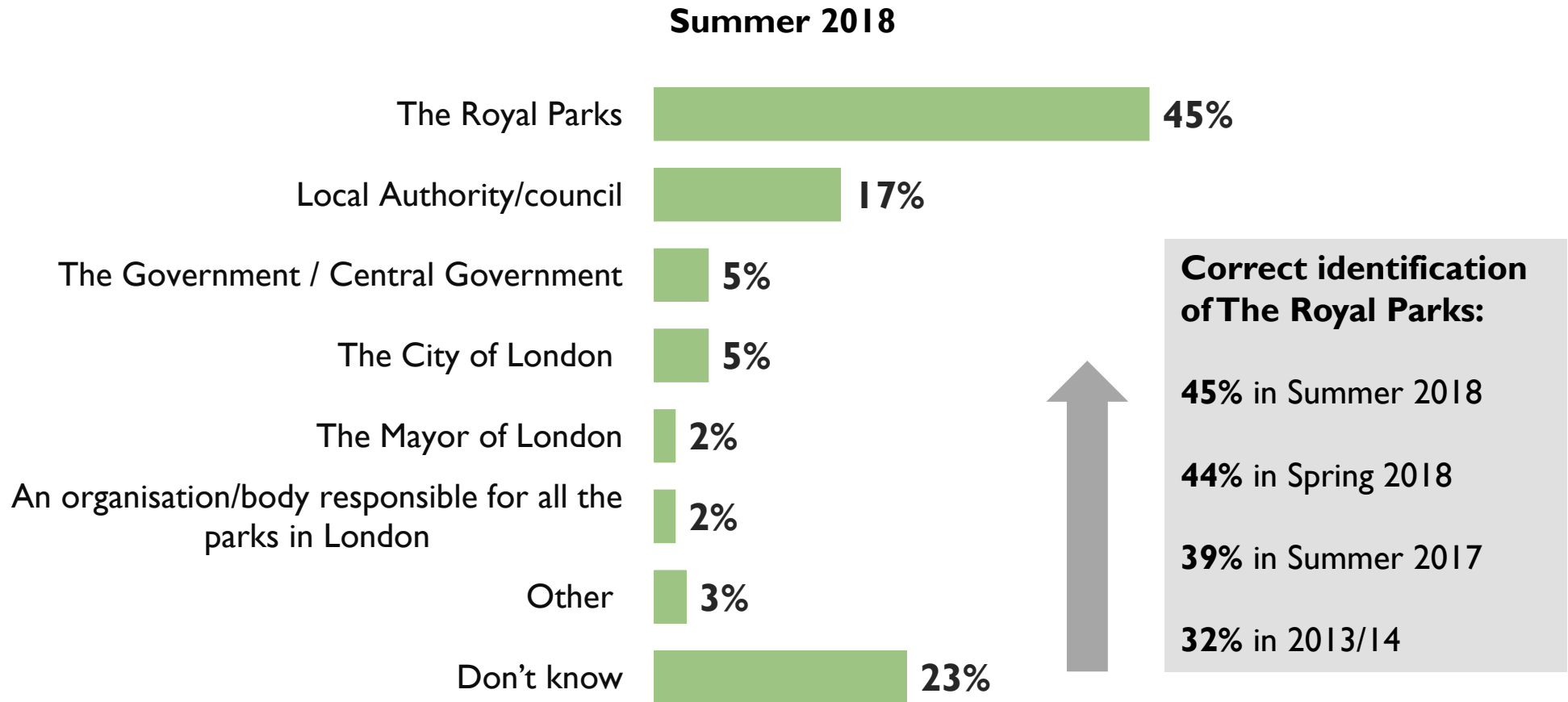
THE ROYAL PARKS

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]?



Base: All visitors to the eight Royal Parks in London in 2013/14 (1699); Summer 2017 (843); Spring 2018 (845) and Summer 2018 (1099).

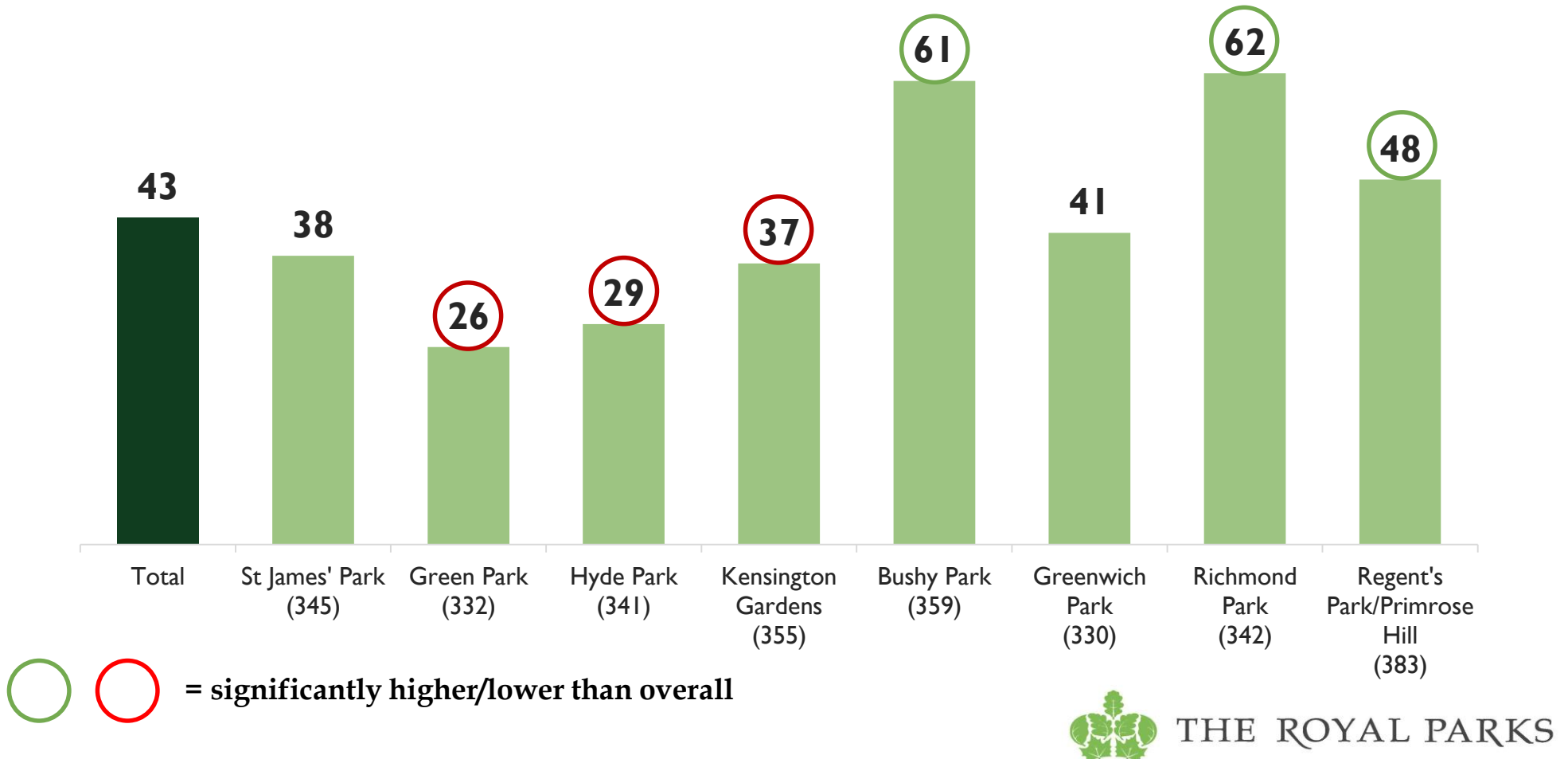


THE ROYAL PARKS

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)

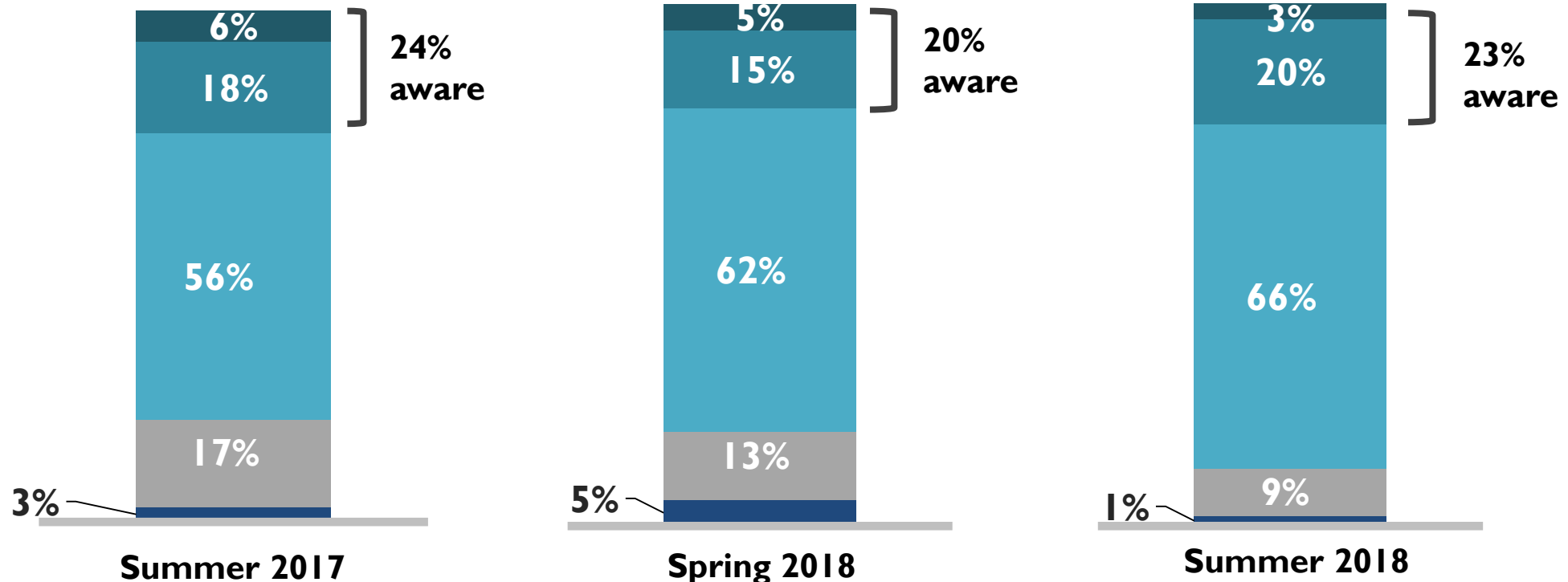


Base: All visitors to the eight Royal Parks in London in 2017/18 (base sizes in brackets).

Awareness of The Royal Parks' charity status has not increased with awareness of your role

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

- Yes - fully aware that The Royal Parks is a charity
- Yes - aware that The Royal Parks is a charity but not in detail
- No - not aware that The Royal Parks is a charity
- Heard nothing about The Royal Parks
- Don't know



Base: All visitors in Summer 2017 (843); Spring 2018 (845); Summer 2018 (1,099).

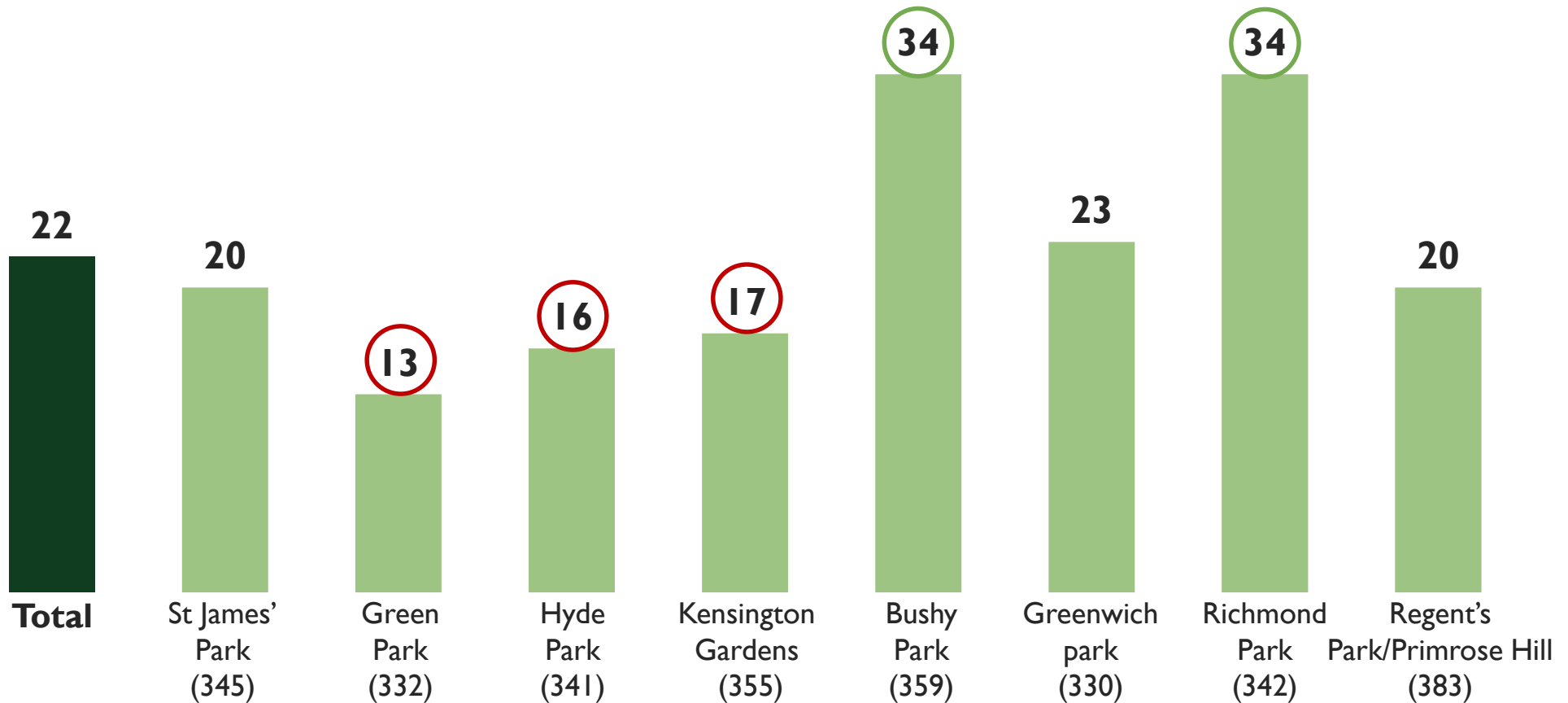


THE ROYAL PARKS

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)



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



THE ROYAL PARKS

Engaged groups more likely to be aware of The Royal Parks' role and charity status in 2017/18

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

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

More likely than overall to correctly identify The Royal Parks' role (43% overall):

- 🌿 Ages 35-44 (48%), 45-54 (49%), 55-64 (57%) and 65+ (58%)
- 🌿 White visitors – 48%
- 🌿 Those aware The Royal Parks is a charity (75%) and more likely than overall to volunteer (50%)

More likely than overall to be aware that The Royal Parks is a charity (22% overall):

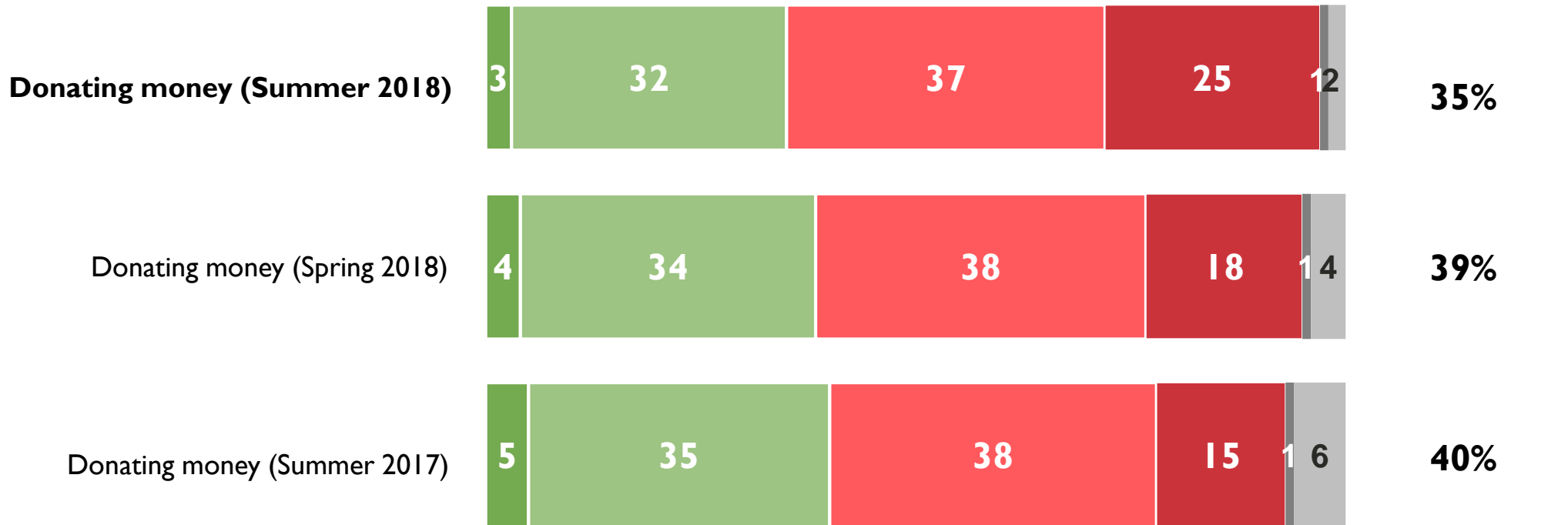
- 🌿 Those living within half a mile (35%) and within two miles (32%)
- 🌿 35-44s (27%) and Over 65s (30%)
- 🌿 Those more likely than overall to donate (29%) and volunteer (30%)



Overall decline in those likely to donate between Summer 2017 and 2018

Q. How likely, if at all, would you be to donate money to The Royal Parks charity?

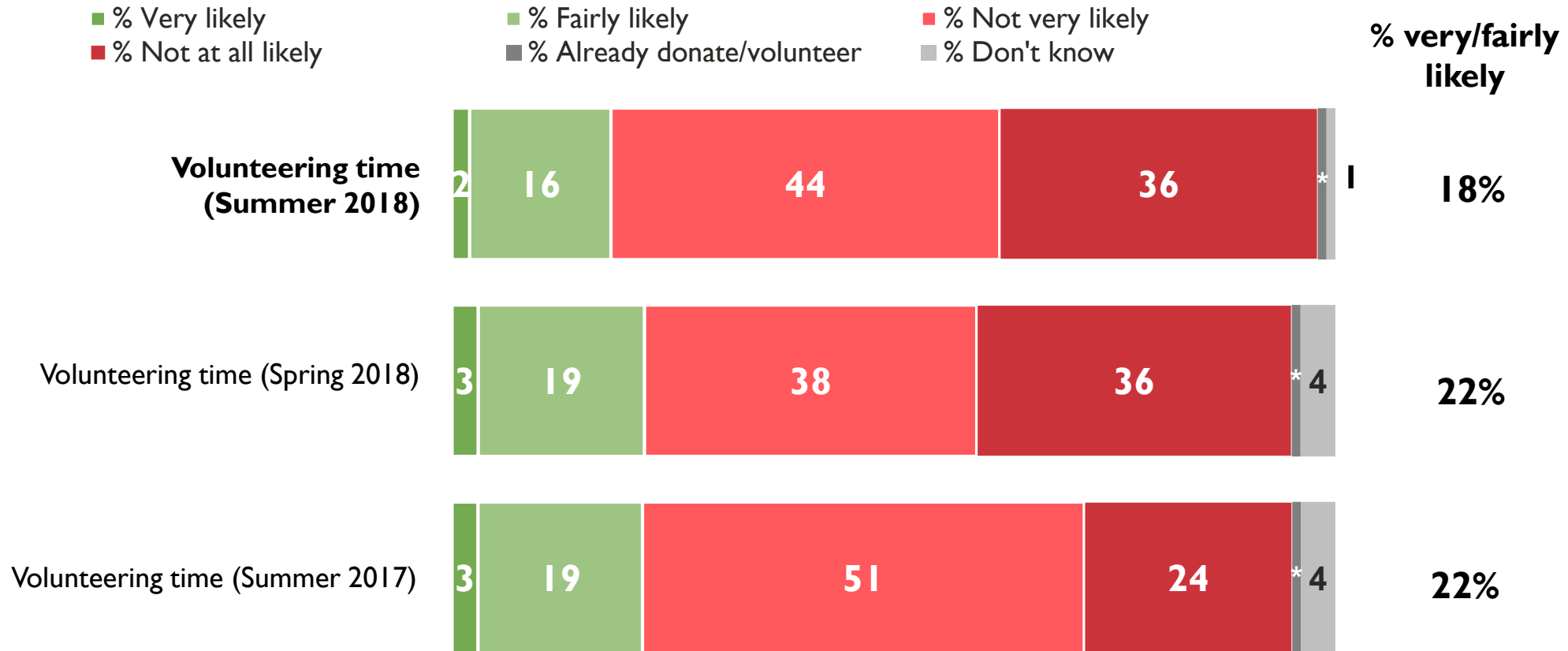
■ % Very likely ■ % Fairly likely ■ % Not very likely % very/fairly likely
■ % Not at all likely ■ % Already donate/volunteer ■ % Don't know



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

Visitors' likelihood to volunteer has also declined over the same period

Q. How likely, if at all, would you be to volunteer time to The Royal Parks charity?

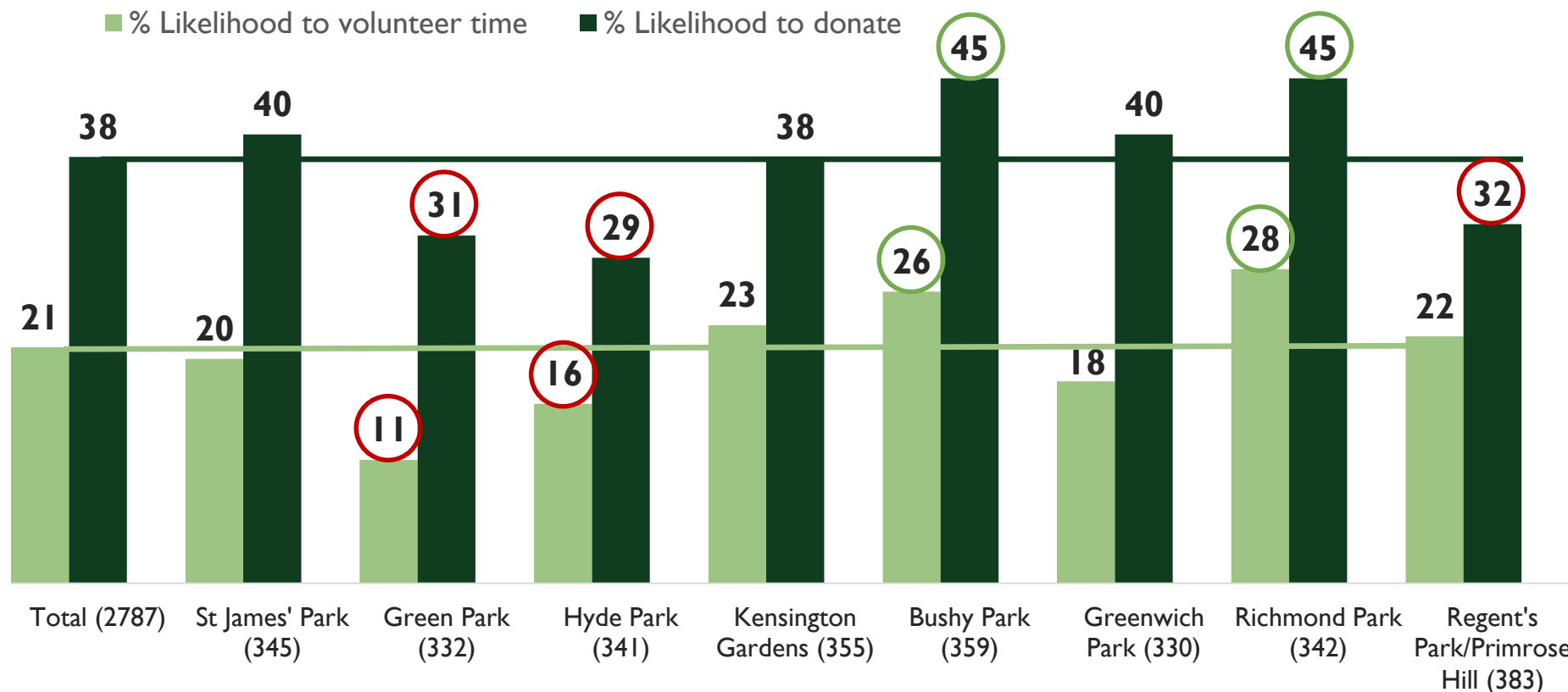


Significant decrease in 'very/fairly likely' between Summer 2017 and Summer 2018

Visitors to certain outer London parks more likely to donate and volunteer, while the opposite is true for some inner London parks

Q. How likely, if at all, would you be to donate money/volunteer time to The Royal Parks charity?

2017/18
% Very/fairly likely



○ = statistically higher than the total
○ = statistically lower than the total

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



THE ROYAL PARKS

Groups more likely than overall to donate money and volunteer time to The Royal Parks

Q. How likely, if at all, would you be to donate money to The Royal Parks charity?

Groups more likely to donate, compared with 38% overall in 2017/18:

- Frequent visitors – 43%
- Londoners (42%) and those from the UK (41%)
- Those aged 35-44 – 45%
- Those living within 2 miles – 47%
- Visitors rating the park they are in as excellent/good – 38%
- Visitors likely to volunteer time – 63%
- Those aware The Royal Parks is a charity – 49%

Groups more likely to volunteer, compared with 21% overall in 2017/18:

- Frequent visitors – 27%
- Londoners (26%) and those from the UK (24%)
- Women – 23%
- Those living within half a mile (29%) and within 2 miles (28%)
- Those also likely to donate money – 34%
- Those aware The Royal Parks is a charity – 28%

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.



Research with residents living locally to Hyde Park



THE
ROYAL
PARKS

Attitudes towards events hosted in Hyde Park



Majority supportive of the range of events hosted in Hyde Park

Q.To what extent do you support or oppose... being held in Hyde Park? % support

Summer concerts



2018: **58%**

2016: 61%

2015: 59%

2014: 61%

2013: 58%

Winter Wonderland



66%

71%

80%

Royal Parks Half Marathon



72%

72%

Swim Serpentine



63%

69%

All residents living within a defined area around Hyde Park (300). Fieldwork dates: 26 September – 13 October 2018.



THE ROYAL PARKS

The vast majority of residents are happy for events to be held, but want to be consulted, and want reassurance that funds are invested in the parks

Q. To what extent do you agree or disagree...

■ % Strongly agree

■ % Tend to agree

■ % Neither agree nor disagree

■ % Tend to disagree

■ % Strongly disagree

■ Don't know

% agree

Events should not be held in any of the Royal Parks, including Hyde Park, even if this means there will be less money available for managing and maintaining the parks for residents and visitors



11%

I would be happy for events like these to be held in the Royal Parks, including Hyde Park, if I knew the money generated would be used to help maintain the parks



86%

It is important for The Royal Parks to consider the views of local residents when planning for future events like these



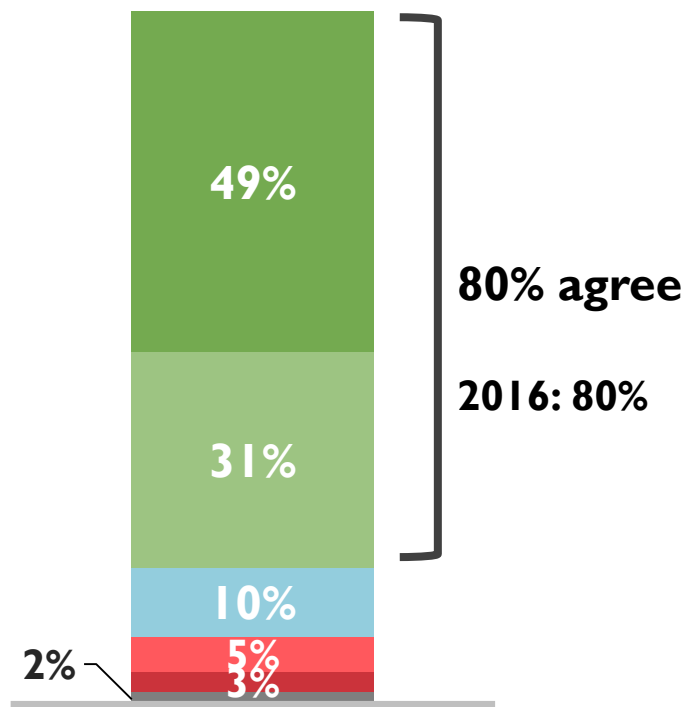
87%



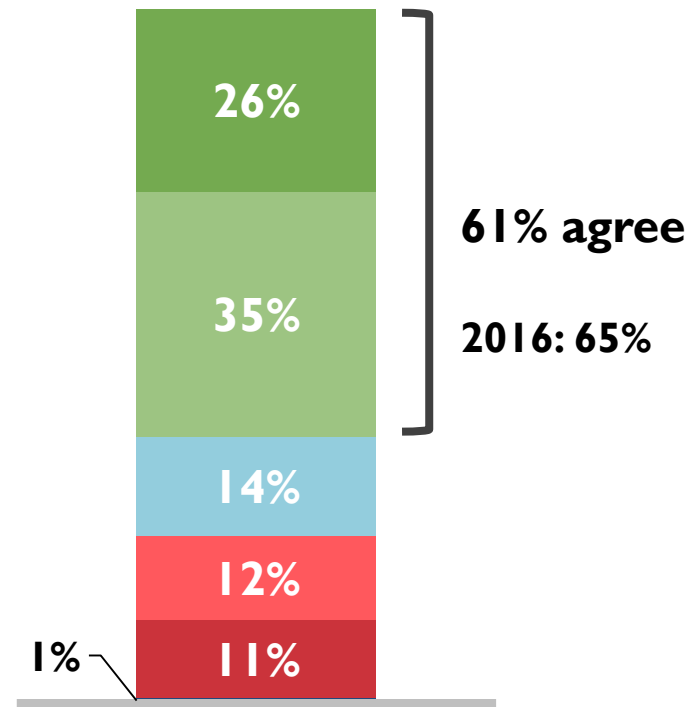
Reputational impact of events seen to be positive, but insufficient information remains a concern

Q. To what extent do you agree or disagree...

Strongly agree Tend to agree Neither agree nor disagree Tend to disagree Strongly disagree Don't know



Events in Hyde Park have a positive impact on London's reputation



There is insufficient information about events held in Hyde Park for me as a local resident.



Support for and opposition to the summer concerts



Summer concerts retain the support of most residents – and opposition remains stable

Q. To what extent do you support or oppose the summer concerts being held in Hyde Park?



All residents living within a defined area around Hyde Park (300 in 2018, 308 in 2016, 300 in 2015, 300 in 2014 and 412 in 2013).
Fieldwork dates: 26 September – 13 October 2018, 12 – 27 October 2016, 12 – 26 October 2015, 12 – 23 February 2014 and 13 February – 03 March 2013.

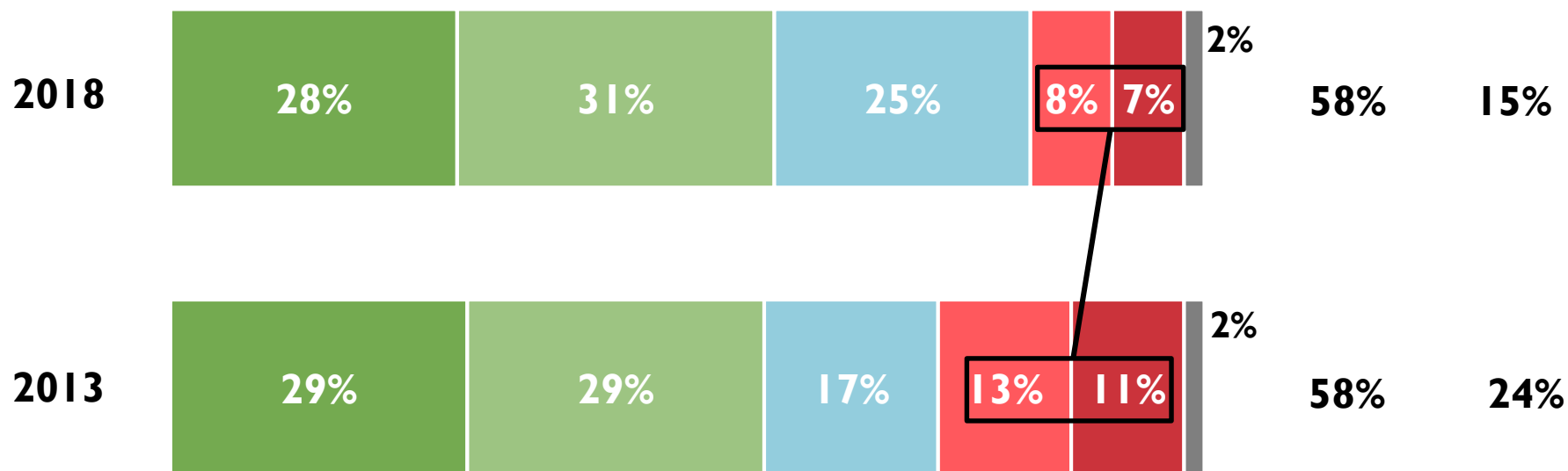


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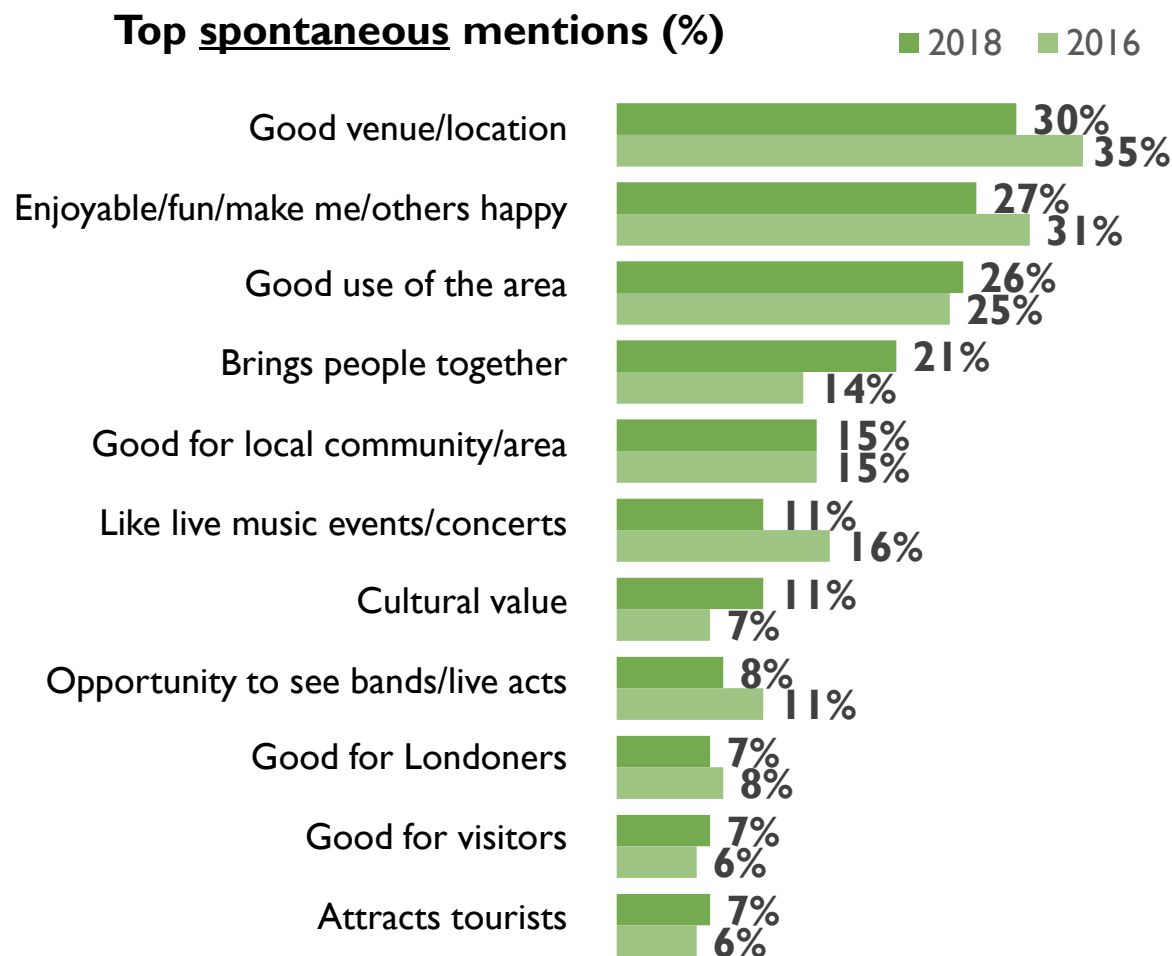
Overall, opposition to the concerts has fallen since 2013, and been replaced by neutrality

Q. To what extent do you support or oppose... being held in Hyde Park? % support

■ % Strongly support ■ % Tend to support ■ % No feelings either way % support % oppose
■ % Tend to oppose ■ % Strongly oppose ■ % It depends/don't know



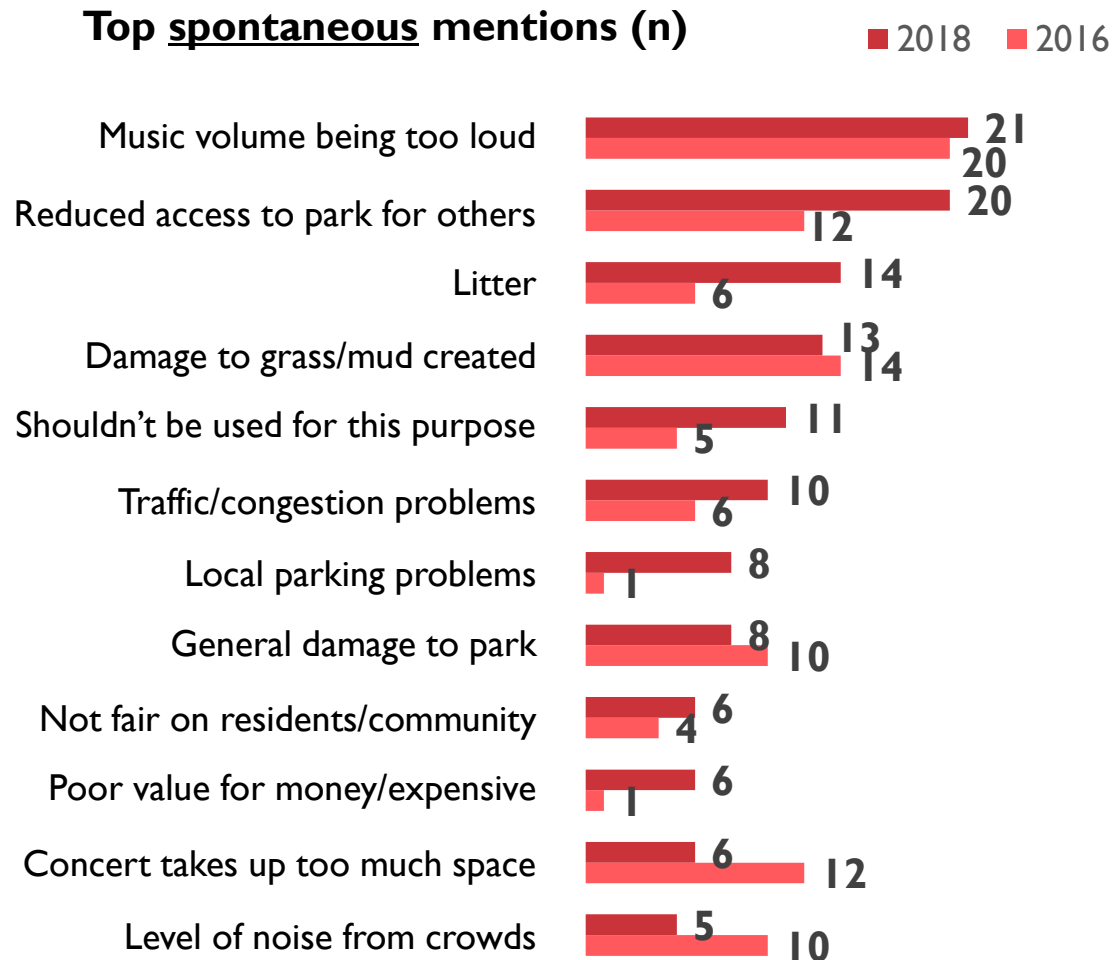
Top reasons for *supporting* summer concerts being held in Hyde Park



The top drivers of support are the strength of Hyde Park as a venue, and the enjoyability of concerts and perception they are a good use of the area



Top reasons for *opposing* summer concerts being held in Hyde Park?



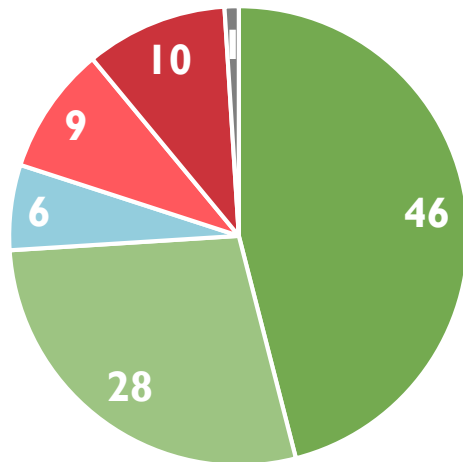
Access to the park and litter have risen up the list of concerns since 2016 – but remember numbers are small



A quarter acknowledge inconvenience for others, and 1 in 5 have experienced problems personally

Q. I would like you to tell me the extent to which to agree or disagree with [the following statements]...?

Personally, I have not experienced any problems as a result of summer concerts held in Hyde Park



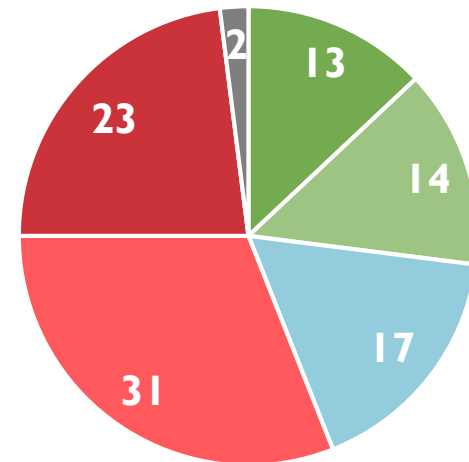
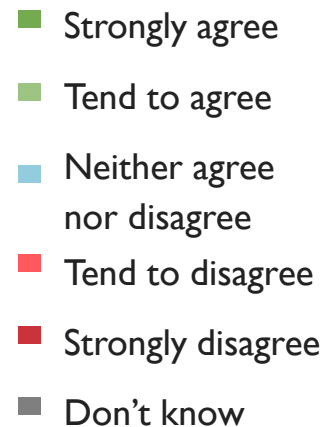
Agree:

74%

Disagree:

20%

Summer concerts held in Hyde Park cause inconvenience and problems for local residents



Agree:

27%

Disagree:

55%



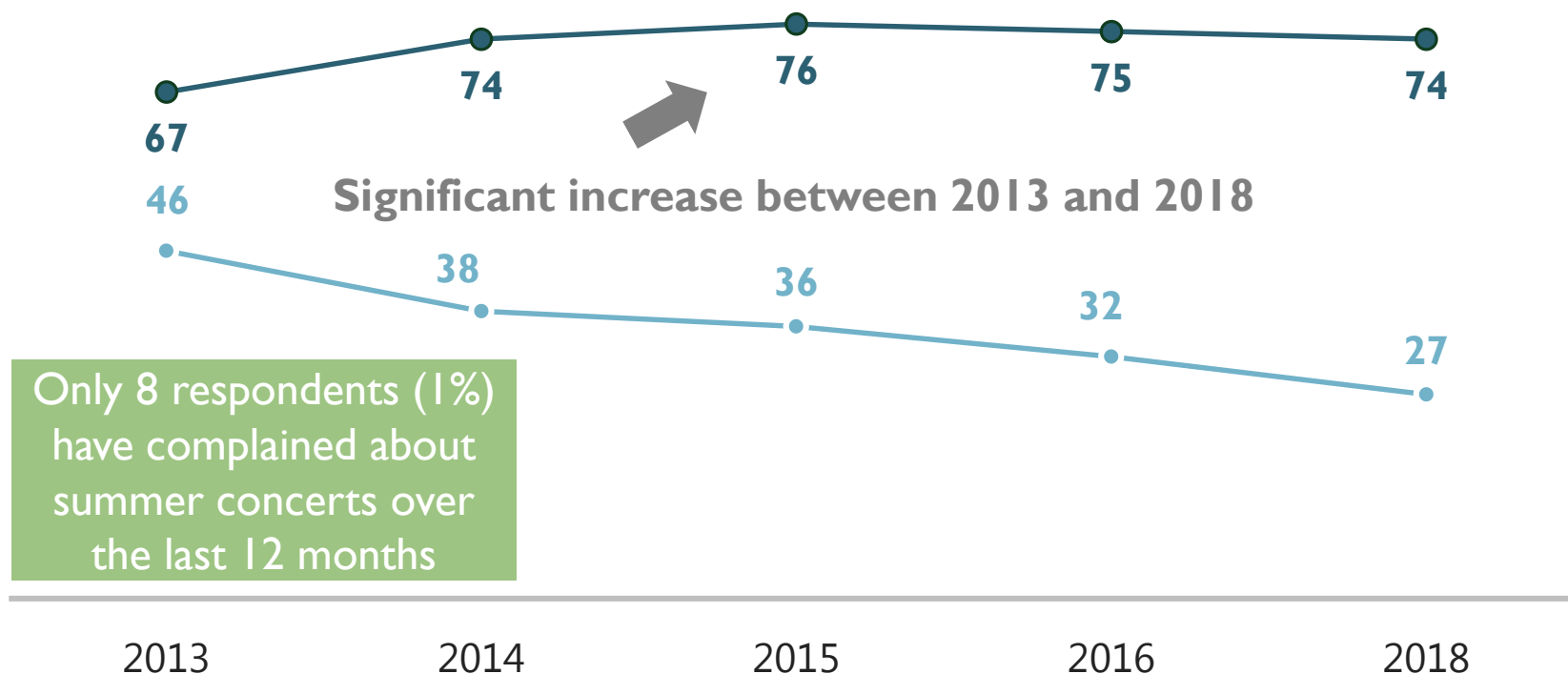
... But experience of problems caused by the concerts has fallen

Personally, I have not experienced any problems as a result of summer concerts held in Hyde Park

Summer concerts held in Hyde Park cause inconvenience and problems for local residents

—●— % Agree 'Personally, I have not experienced any problems...'

—●— % Agree 'Summer concerts... cause inconvenience and problems for local residents'

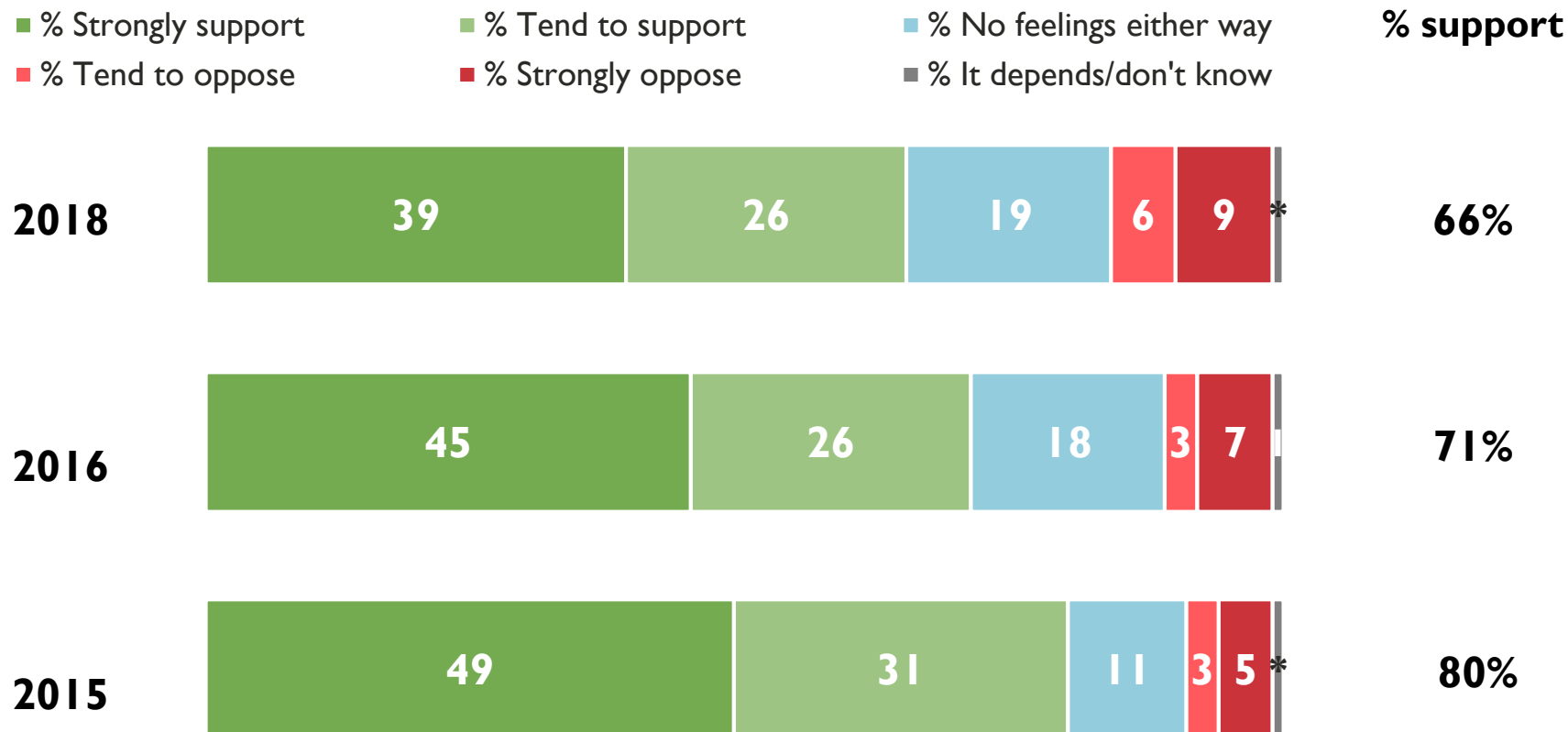


Attitudes to Winter Wonderland



Support for hosting Winter Wonderland in Hyde Park has declined since 2015

Q. To what extent do you support or oppose... being held in Hyde Park?



Significant decrease in 'strongly/tend to support' between 2015 and 2018

All residents living within a defined area around Hyde Park (300 in 2018, 308 in 2016 and 300 in 2015). Fieldwork dates: 26 September – 13 October 2018, 12 – 27 October 2016 and 12 – 26 October 2015,



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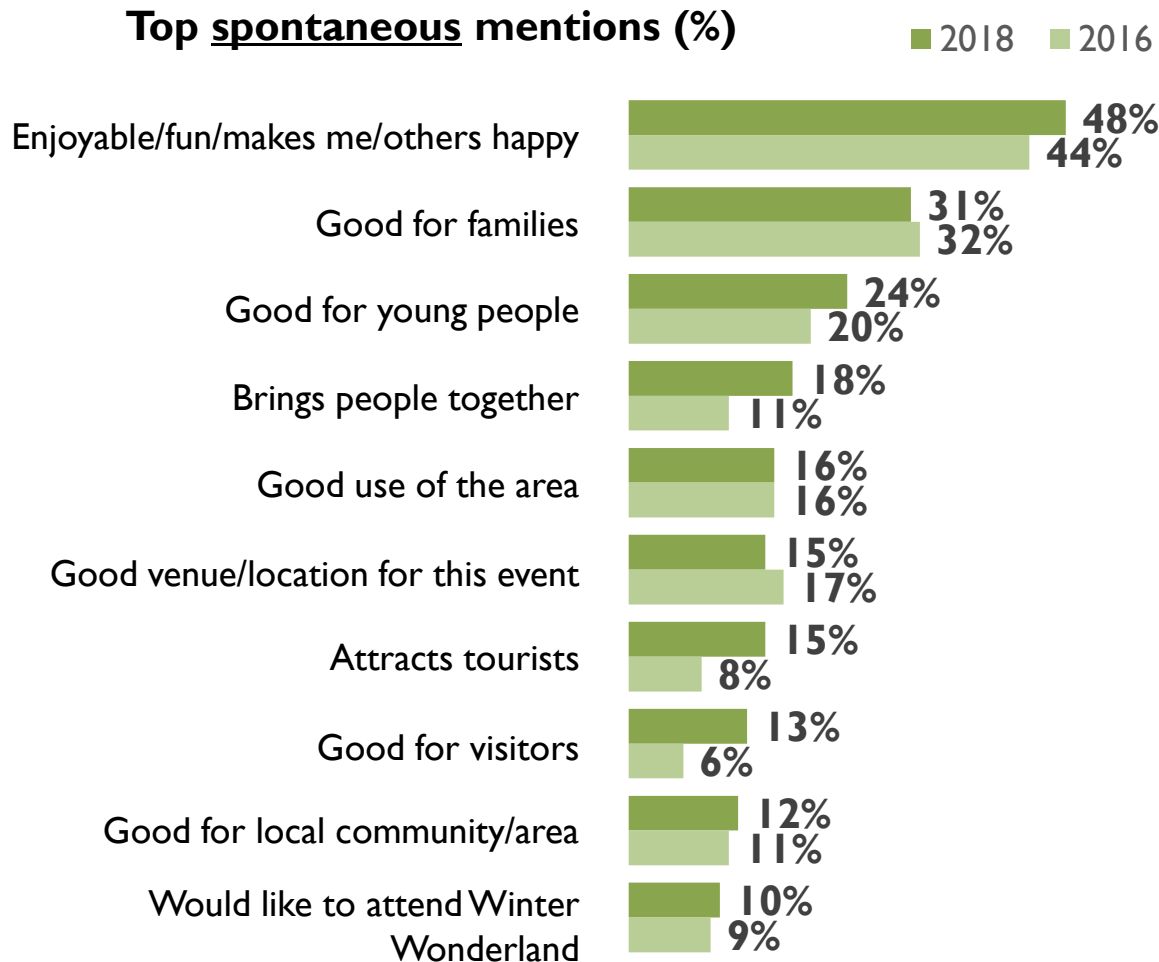
Support and opposition are closely linked to attendance at Winter Wonderland

Q. To what extent do you support or oppose... being held in Hyde Park?

	Attended last year (112 responses)		Did not attend last year (186 responses)	
	Support	Oppose	Support	Oppose
2018	90%	6%	50%	22%
2016	92%	3%	54%	17%



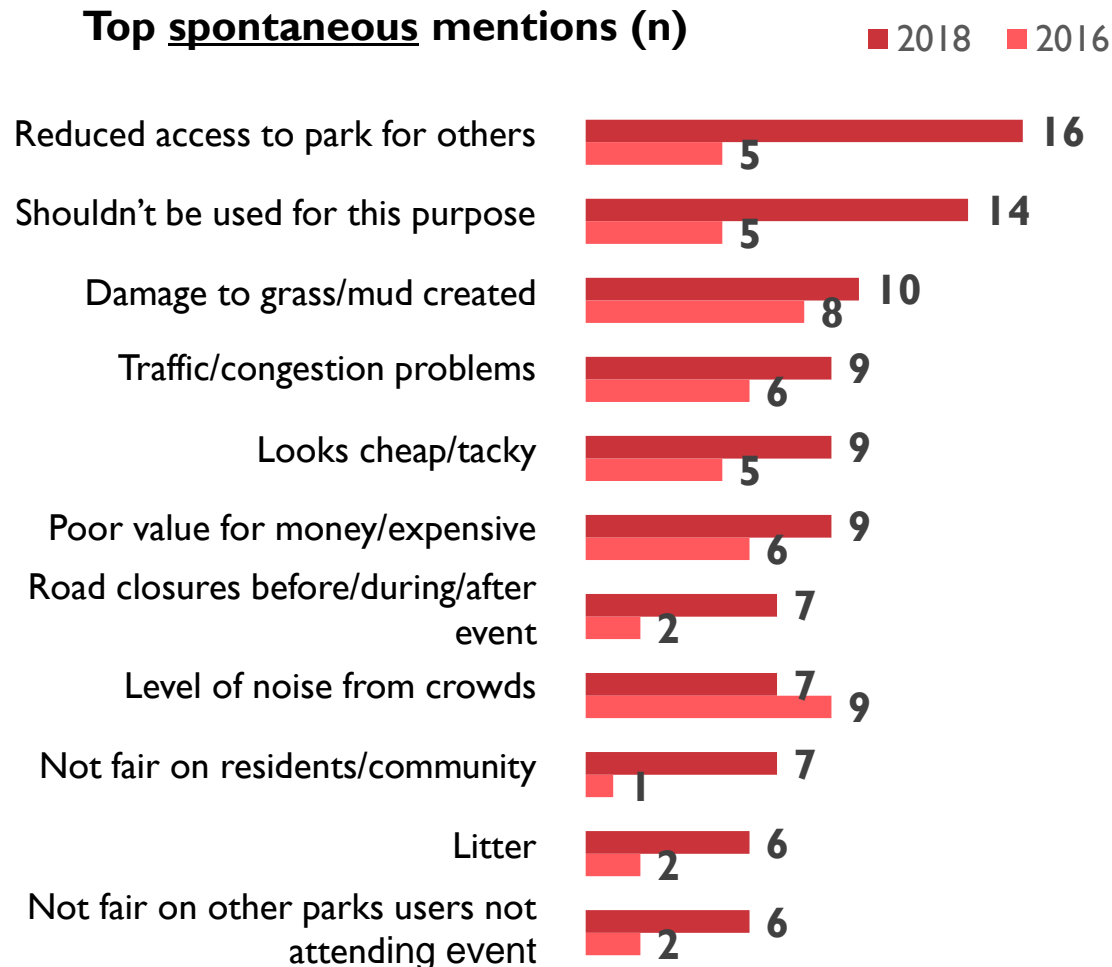
Top reasons for *supporting* Winter Wonderland being held in Hyde Park



Personal enjoyment and benefits for families and young people remain the key reasons for supporting Winter Wonderland



Top reasons for *opposing* Winter Wonderland being held in Hyde Park



Reduced access to the park and a sense that it should not be used for this purpose have emerged as reasons for opposition

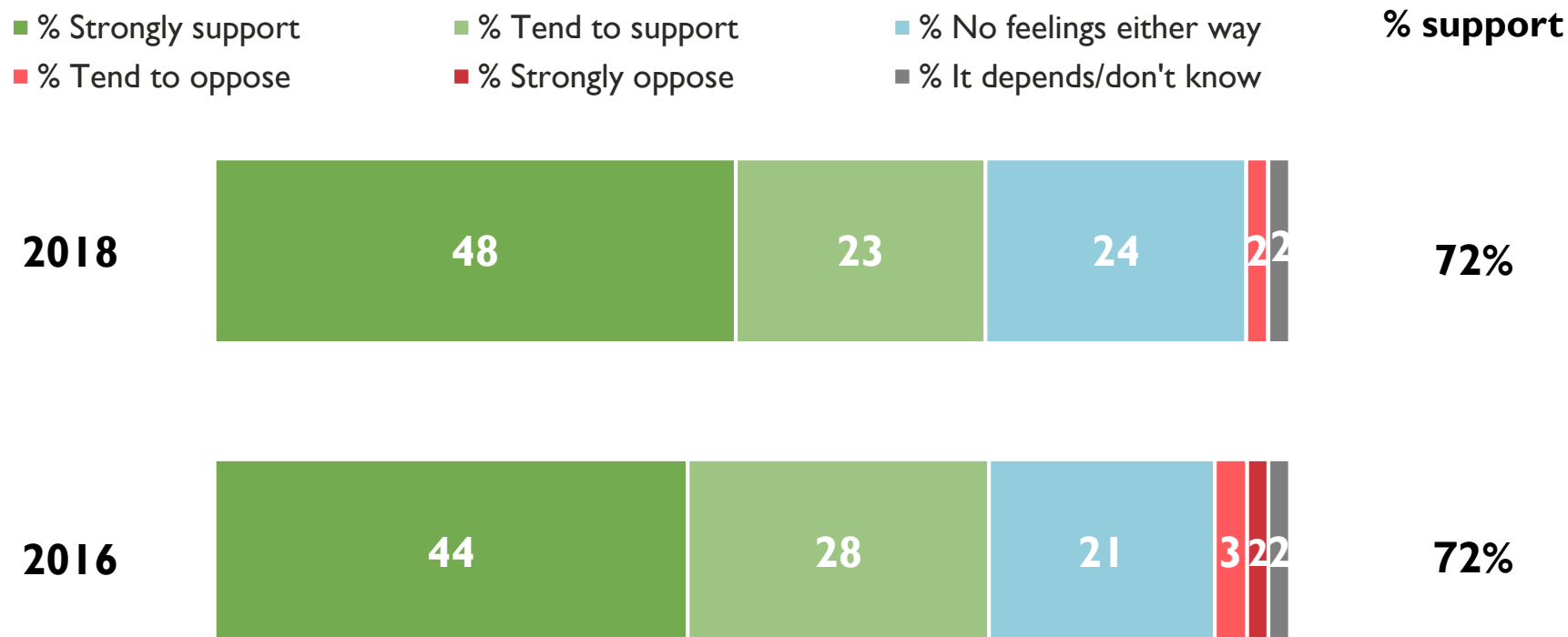


Views on mass-participation sporting events



The Royal Parks Half Marathon remains the most-supported event in Hyde Park

Q. To what extent do you support or oppose... being held in Hyde Park? % support



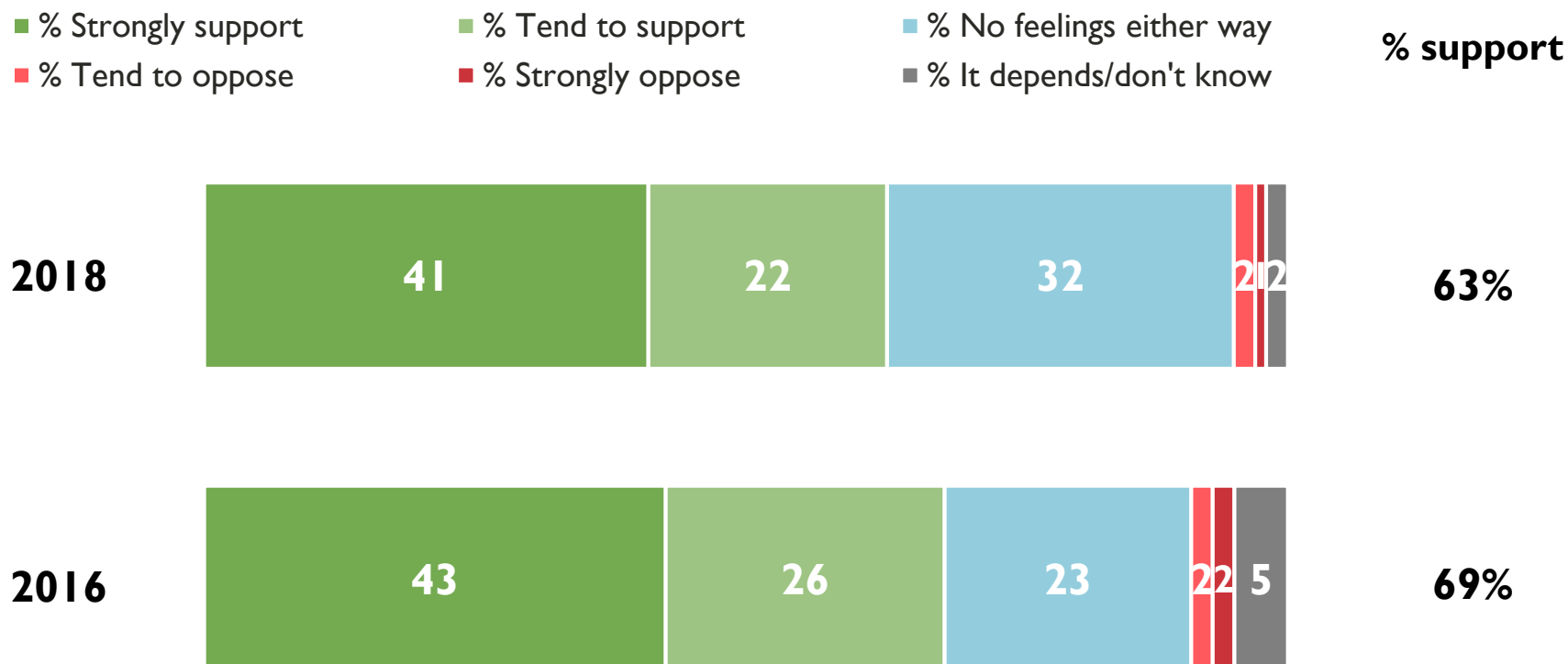
All residents living within a defined area around Hyde Park (300 in 2018 and 308 in 2016). Fieldwork dates: 26 September – 13 October 2018 and 12 – 27 October 2016. In 2016, event referred to as 'Royal Parks Foundation Half Marathon'.



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Swim Serpentine also retains the support of most local residents

Q.To what extent do you support or oppose Swim Serpentine being held in Hyde Park?

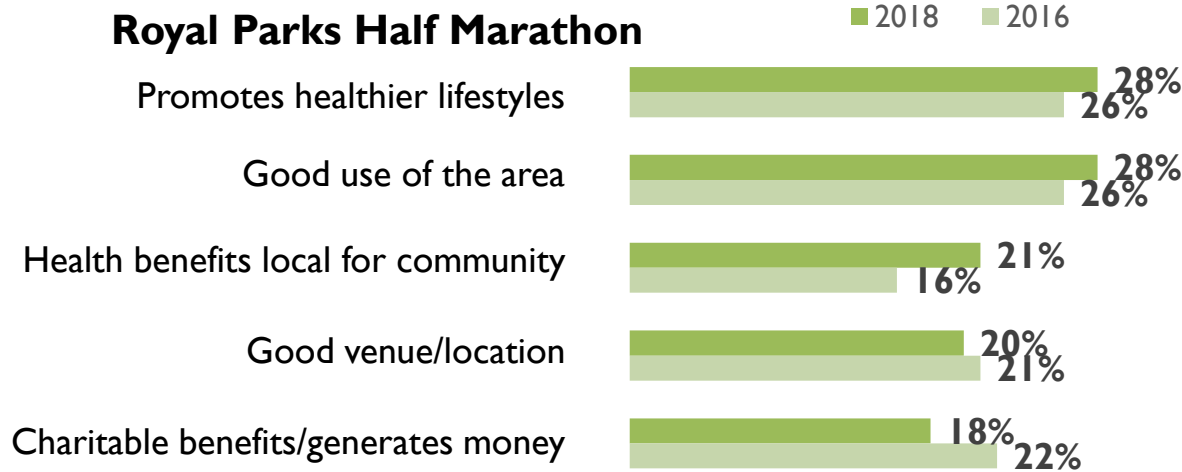


All residents living within a defined area around Hyde Park (300 in 2018 and 308 in 2016). Fieldwork dates:
26 September – 13 October 2018 and 12 – 27 October 2016.



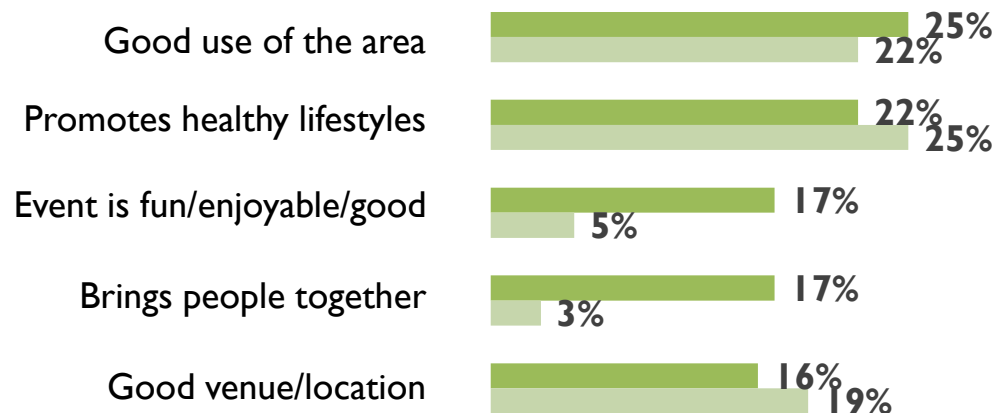
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Healthy lifestyles and good use of the area are the top reasons for supporting sport events



Few oppose the half marathon – most of those who do cite safety concerns

Swim Serpentine



Reduced access to the park is the most-mentioned reason for opposing Swim Serpentine

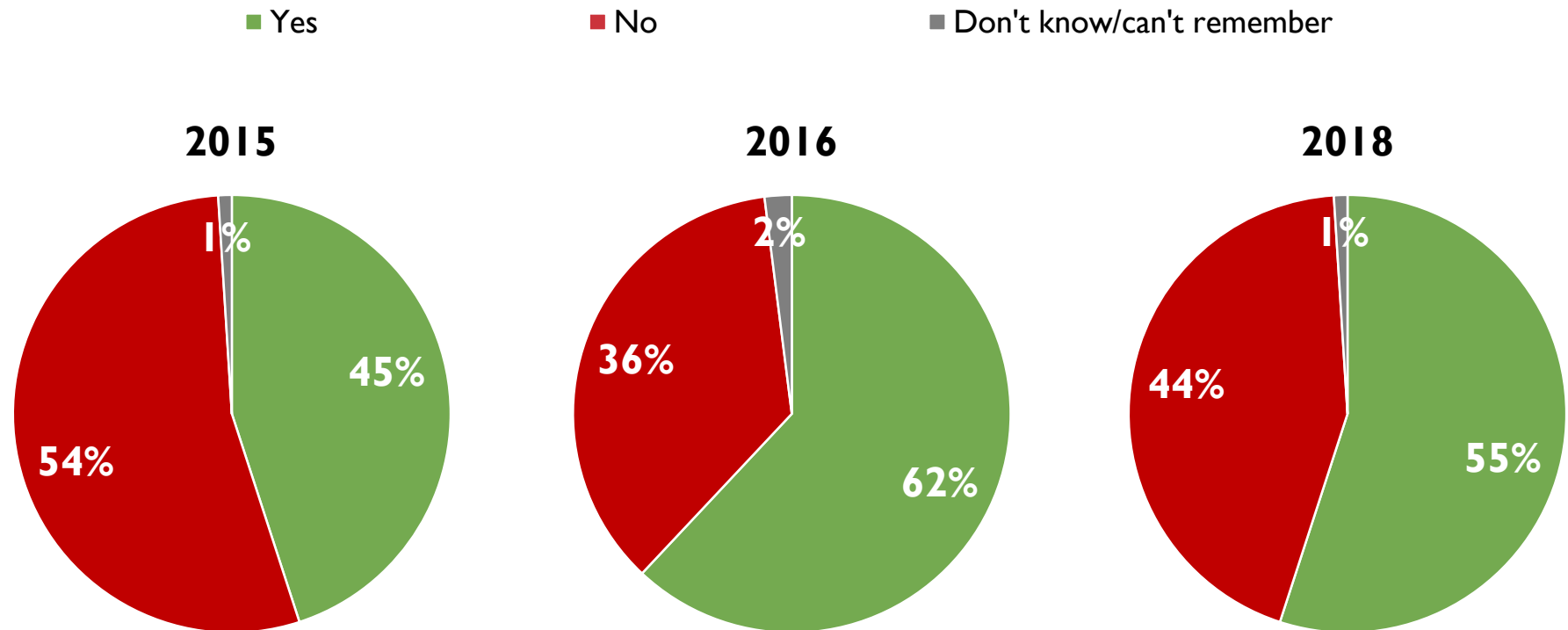


Understanding and awareness of The Royal Parks



As in previous waves, a majority of residents are aware that some of TRP's income is self-generated

Q. Before today were you aware or not that some of The Royal Parks' income is self-generated income from concessions and other commercial means?



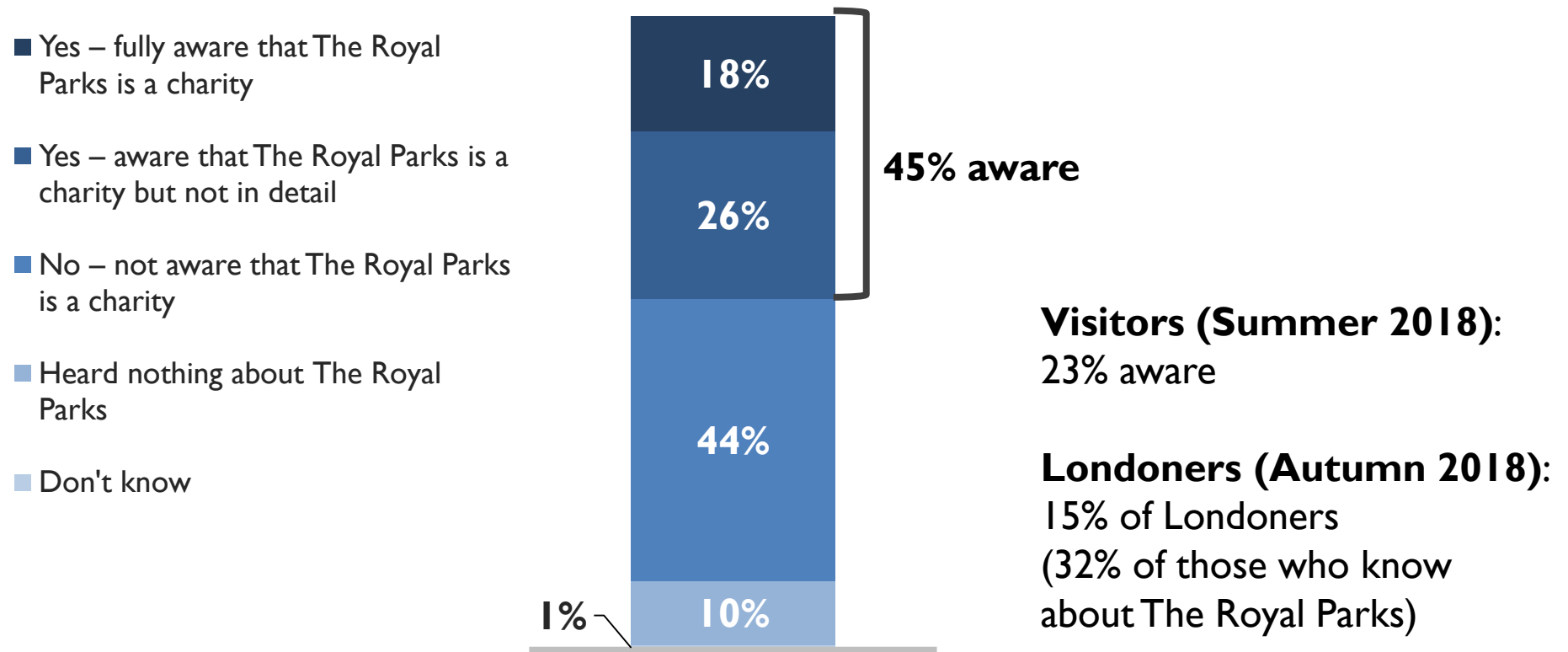
All residents living within a defined area around Hyde Park (300 in 2018, 308 in 2016 and 300 in 2015). Fieldwork dates: 26 September – 13 October 2018, 12 – 27 October 2016, 12 – 26 October 2015.



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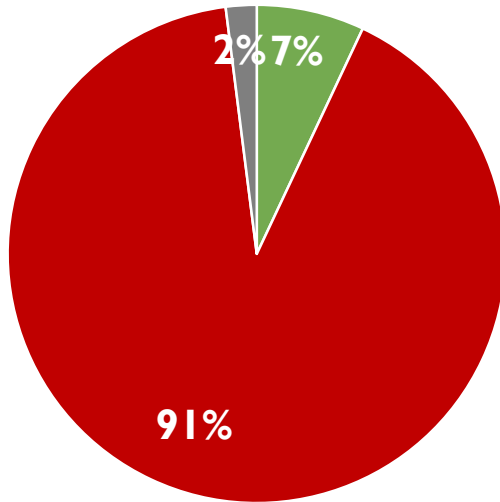
Less than half of local residents are aware The Royal Parks is a charity

Q. Before today, to what extent were you aware or not that The Royal Parks is a charity?



Awareness of email, phone and communication services is consistent with previous waves

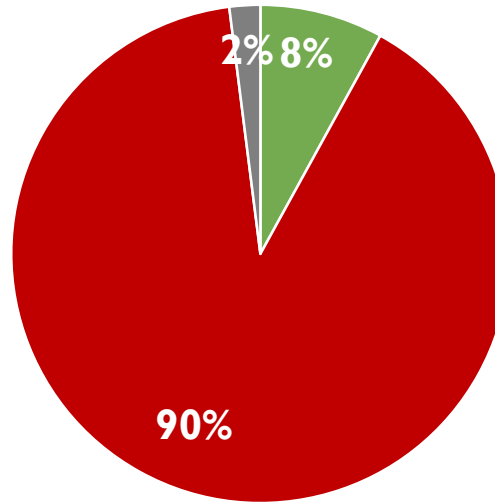
***Aware of event
feedback email address***



2016 awareness: 7%
2015 awareness: 7%

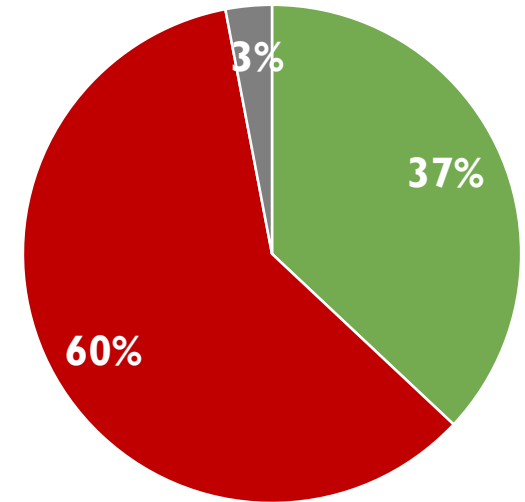
***Aware of
soundline number***

■ Yes ■ No ■ Don't know



2016 awareness: 6%
2015 awareness: 6%

***Seen or heard communications
about set-up, de-rig, closures
for major events***



2016 awareness: 44%
2015 awareness: 39%

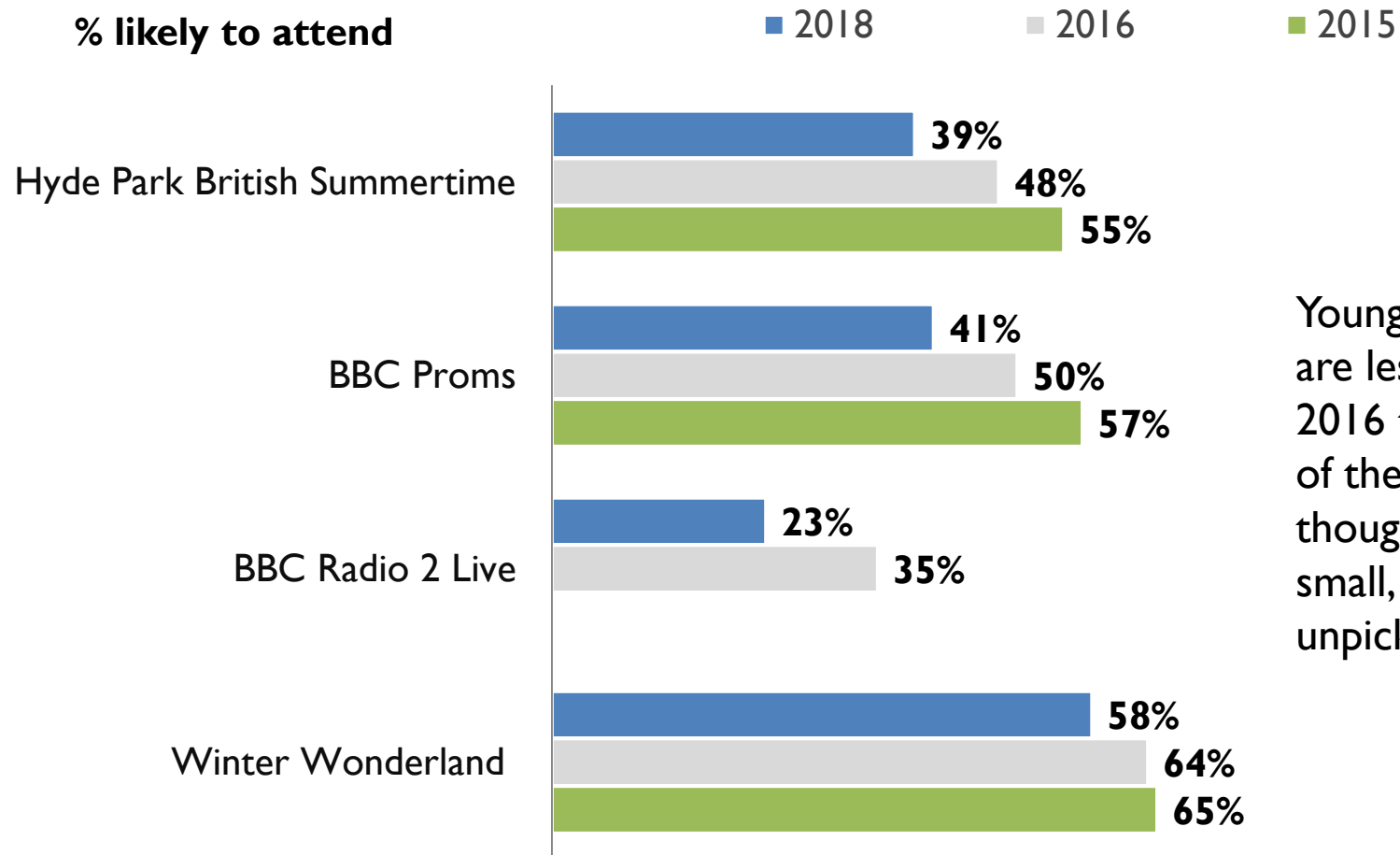


Looking ahead



Likelihood to attend has fallen across all events

Q. ... I would like you to tell me how likely or not you would be to attend each event if it was hosted in Hyde Park in the future... Hyde Park British Summertime

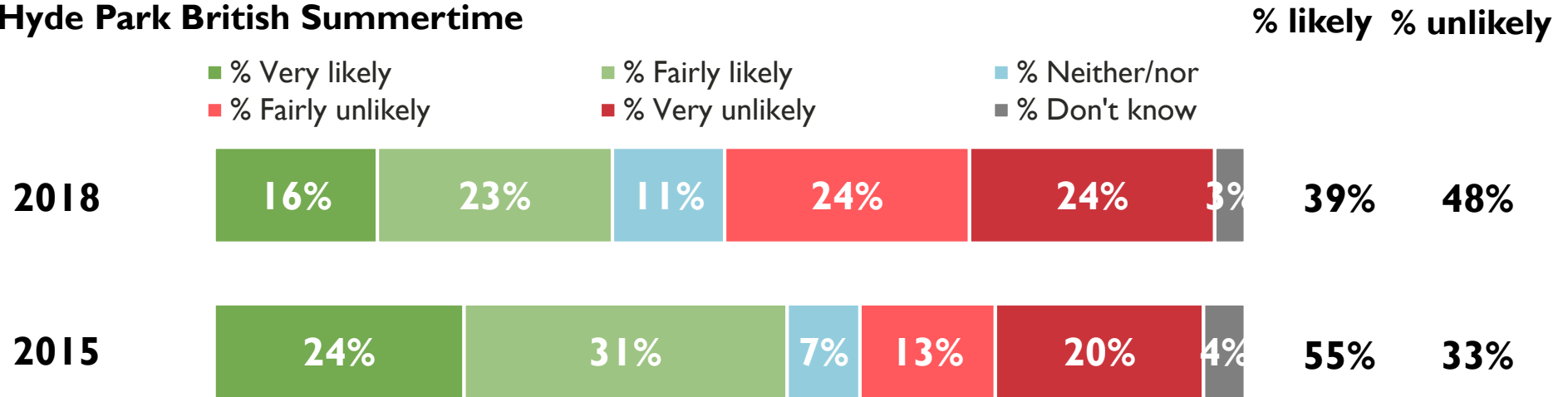


Young people (18-34) are less likely than in 2016 to attend each of these events – though numbers are small, so difficult to unpick why

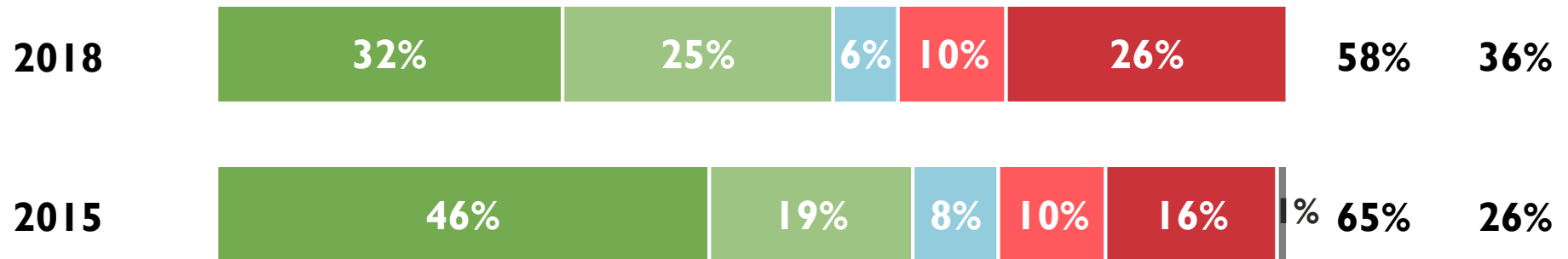


For the first time since 2013, residents are more likely not to attend BST than they are to attend

Hyde Park British Summertime



Winter Wonderland



All residents living within a defined area around Hyde Park (300 in 2018 and 300 in 2015). Fieldwork dates: 26 September – 13 October 2018 and 12 – 26 October 2015.



THE ROYAL PARKS

Hyde Park residents' survey: key findings

- ❁ Summer concerts remain well-supported, opposition seems to have been replaced by neutrality, and fewer feel inconvenienced than ever before
 - ❁ *Residents feel that the concerts are a suitable, enjoyable use of the park*
- ❁ Support for Winter Wonderland has declined since 2016
 - ❁ *Increased opposition is rooted in reduced access to the park and a feeling that it is not a suitable venue*
- ❁ The Royal Parks Half Marathon is the most-supported event in Hyde Park
 - ❁ *Residents feel that the half marathon and Swim Serpentine promote healthy lifestyles*
 - ❁ *This is a key reason for continued majority support of sporting events*
- ❁ A majority of residents recognise the importance of self-generated income, but less than half are aware that The Royal Parks is a charity



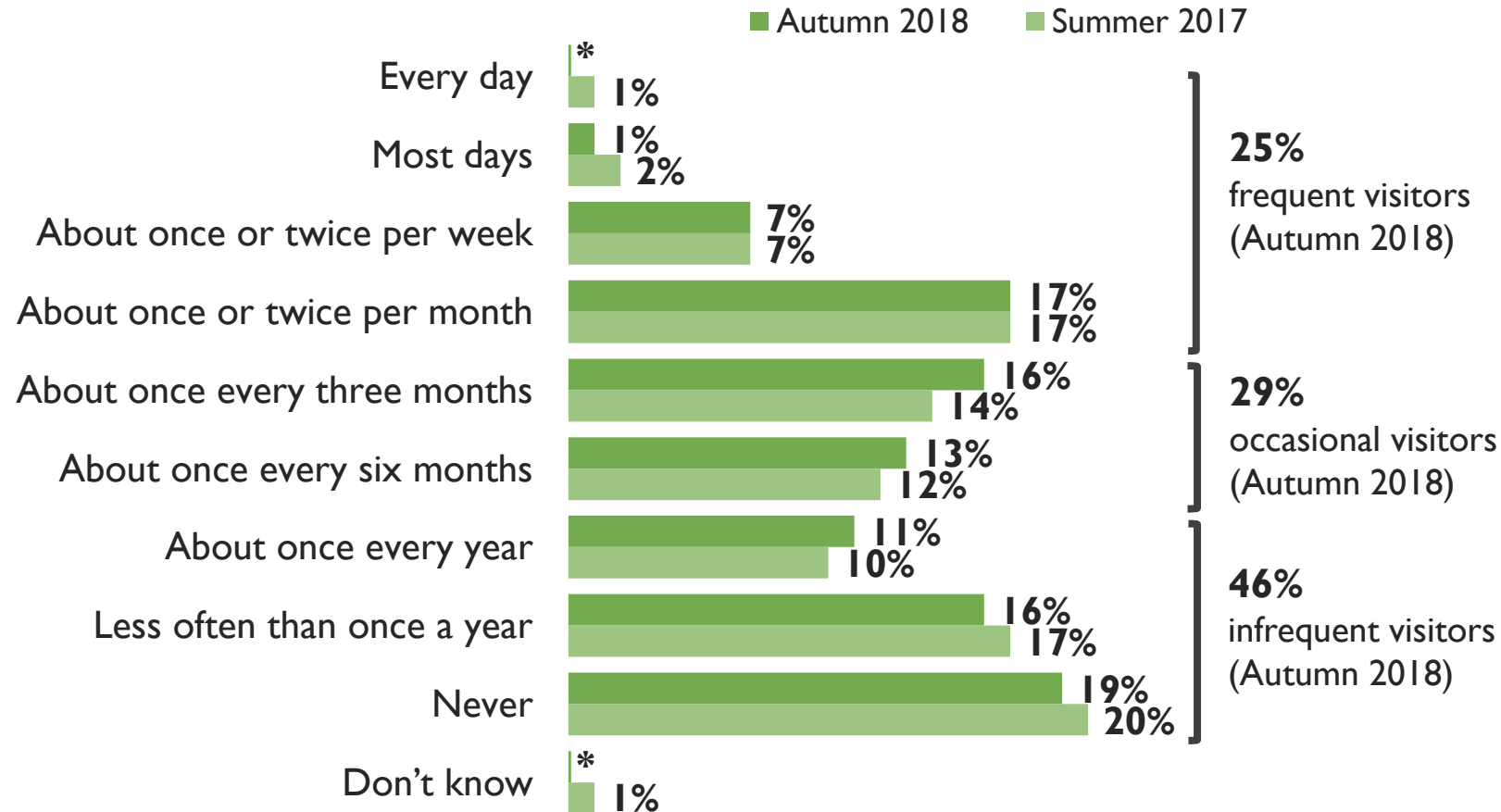


Research with Londoners



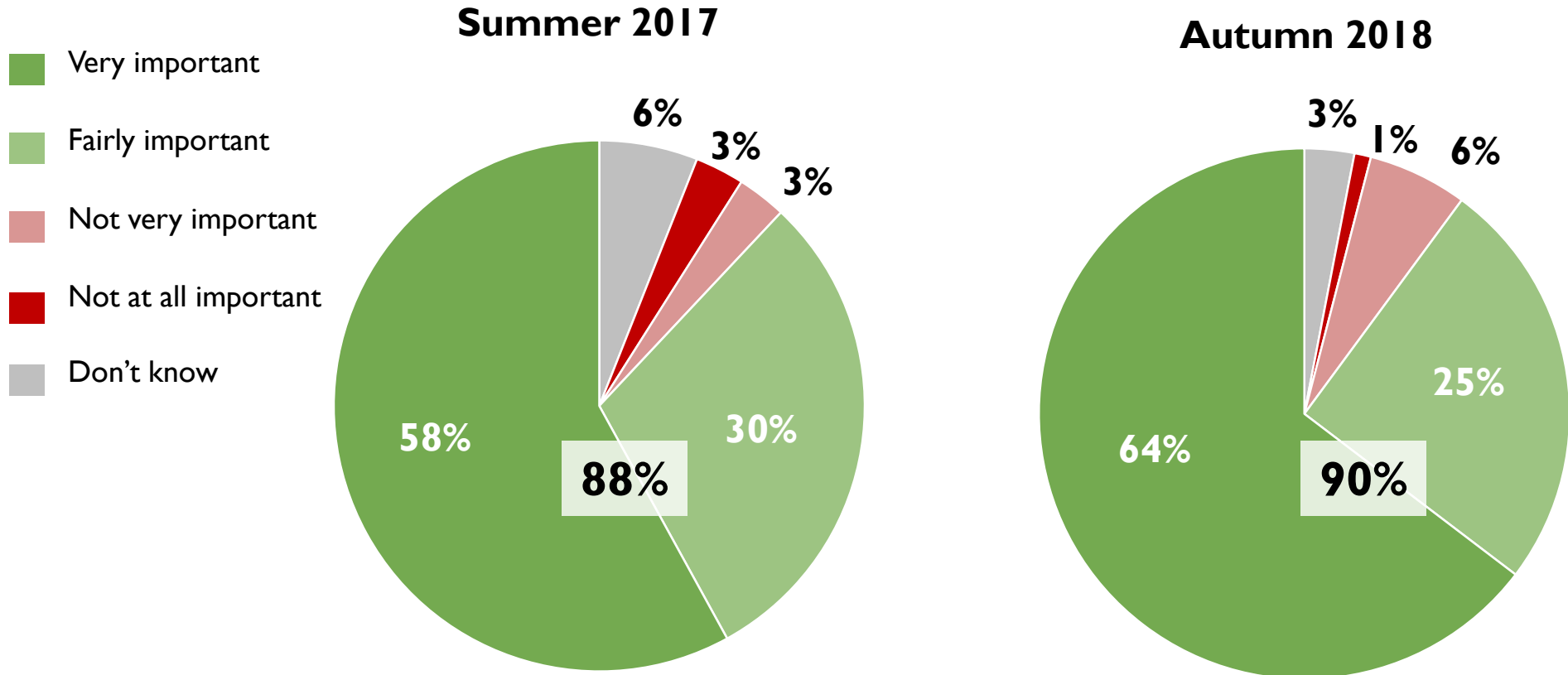
Most Londoners use the parks at least occasionally

Q. How often, if at all, do you typically use, visit, or pass through a Royal Park?



But around two-thirds of Londoners think the parks are *very* important for their city

Q. How important, if at all, do you think the eight Royal Parks are for London?



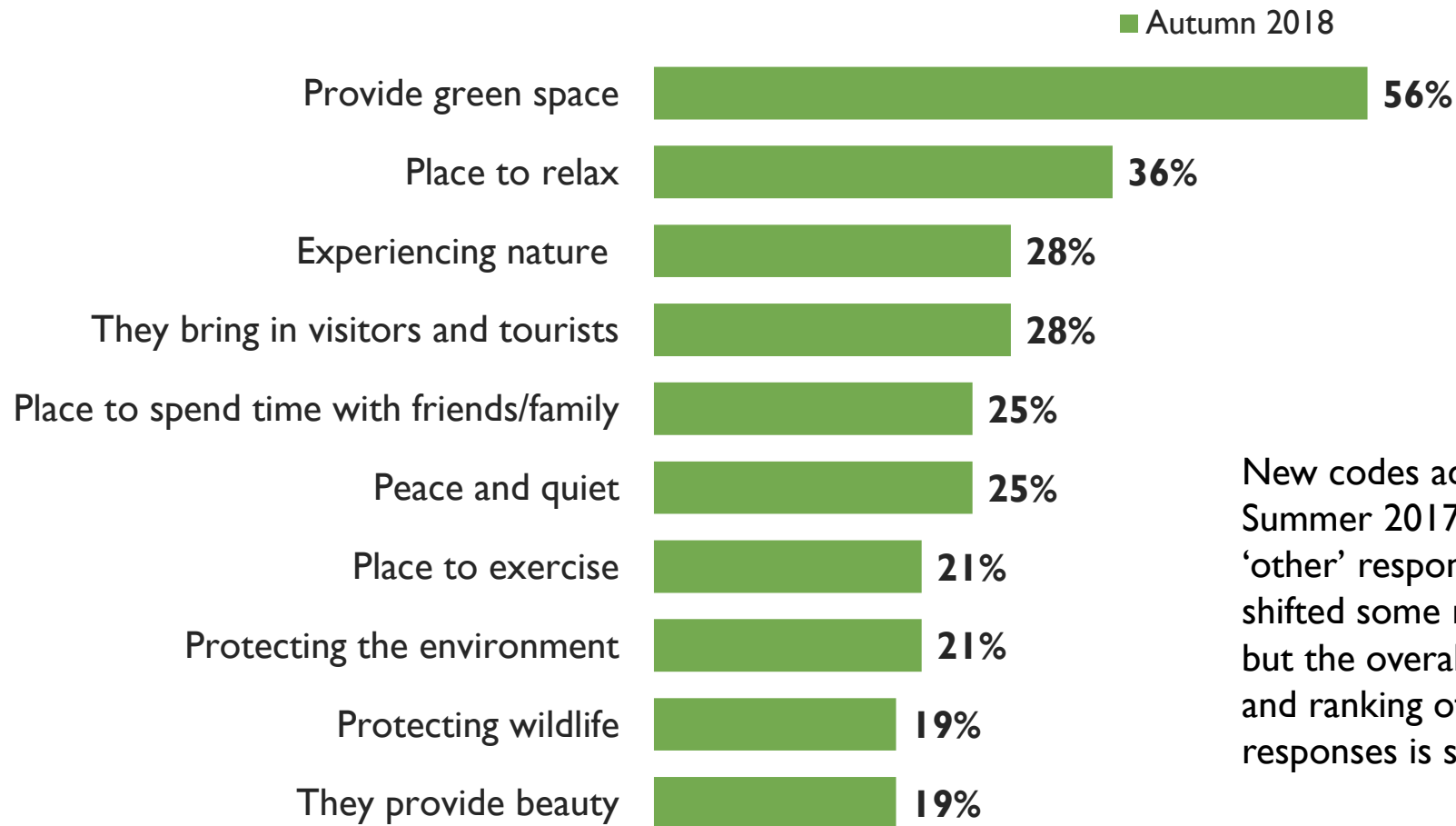
General public living in London (537 in 2018 and 447 in 2017). Fieldwork dates: 26 October – 4 November 2018 and 18 August – 06 September 2017.



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For lots of reasons – green space, relaxation and access to nature all feature in the top 10

Q. Why do you think the eight Royal Parks are important for London?

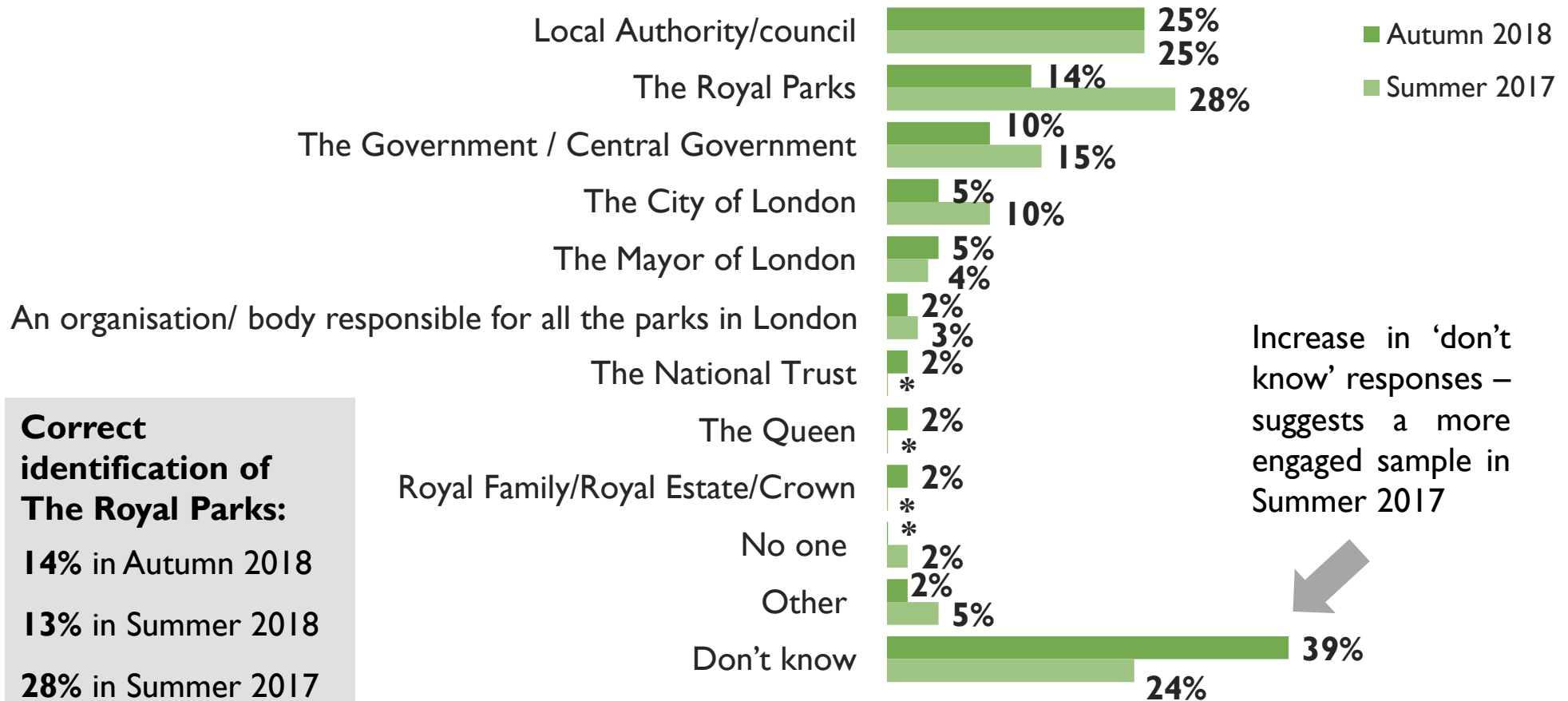


New codes added after Summer 2017 (coding 'other' responses) have shifted some results, but the overall shape and ranking of responses is similar



The proportion who know you manage the parks has fallen since August 2017

Q. As far as you know, who is responsible for managing the eight Royal Parks in London?



Around half of Londoners have heard of or know about The Royal Parks

Q. How much, if anything, would you say you know about The Royal Parks, the organisation which manages the eight Royal Parks in London?

■ A great deal

■ A fair amount

■ Just a little

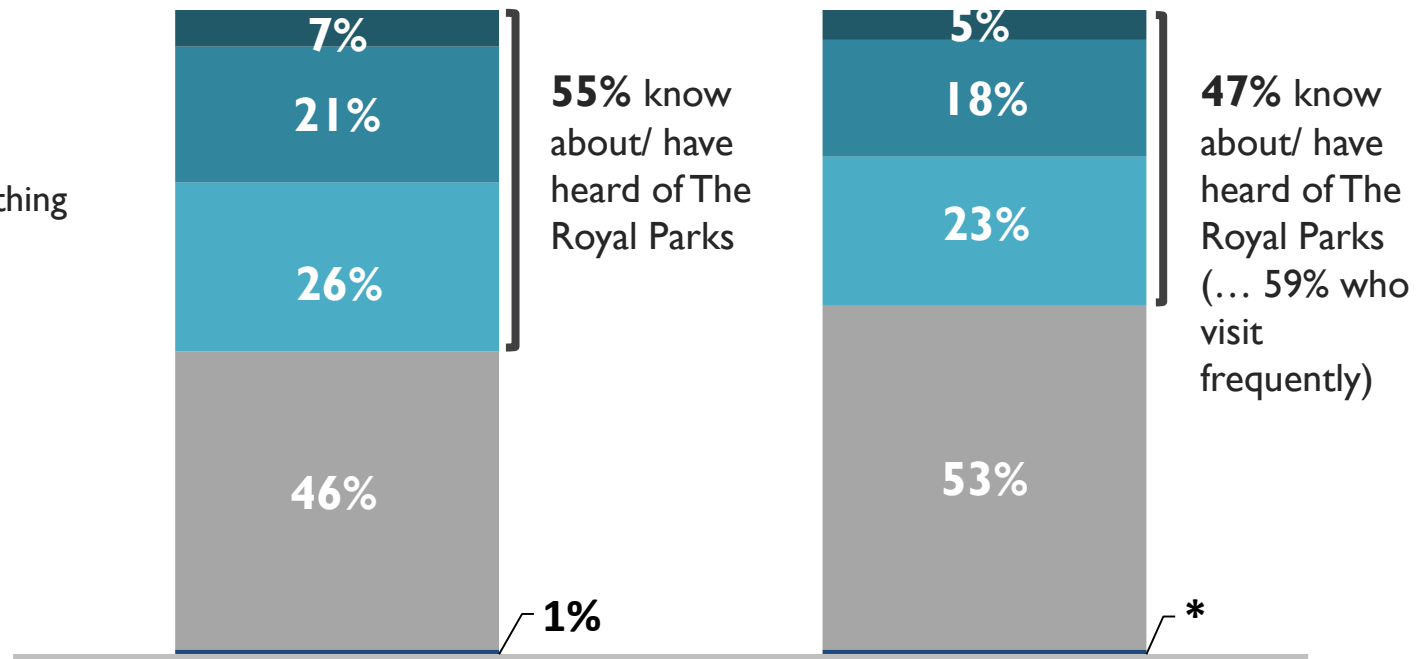
■ Heard of, know nothing about

■ Never heard of

■ Don't know

Summer 2017

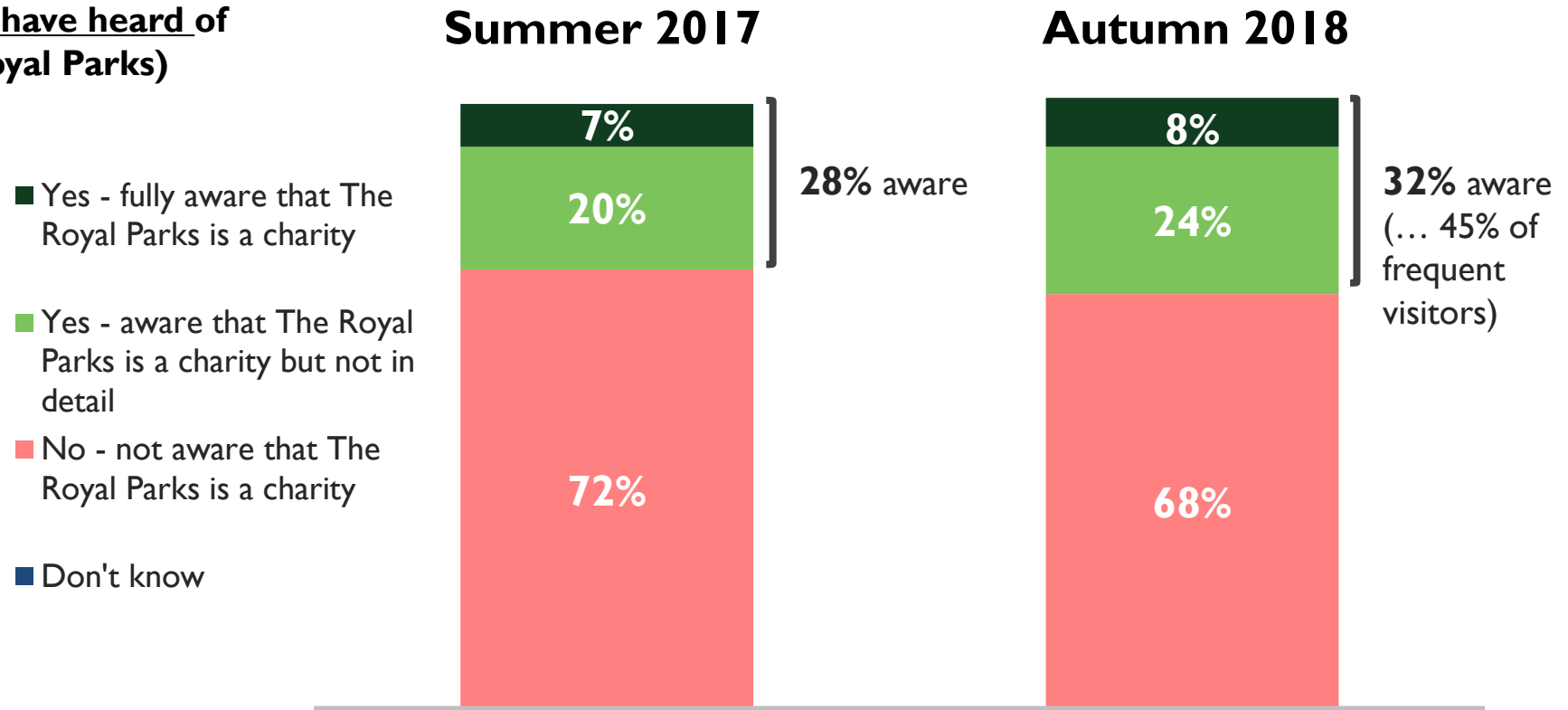
Autumn 2018



Among those who know you, there are signs awareness that you are a charity may be increasing

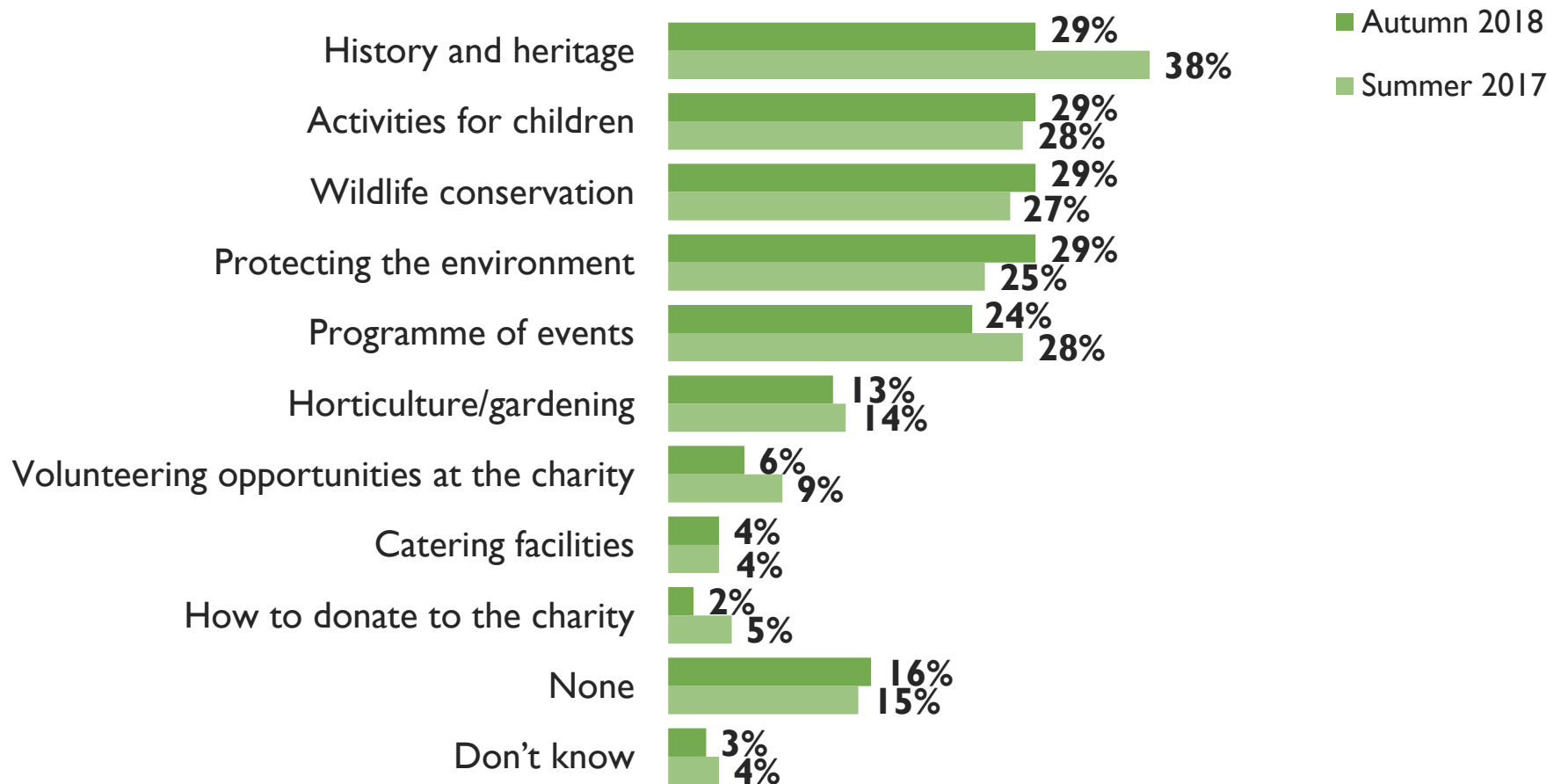
Q. To what extent were you aware or not that The Royal Parks is a charity?

**(Among those who know
about/ have heard of
The Royal Parks)**



Lots of aspects of your work of interest to some – although none stands out, and fewer changes

Q. And which two or three of the following areas of The Royal Parks' work, if any, would you be most interested in finding out more about?



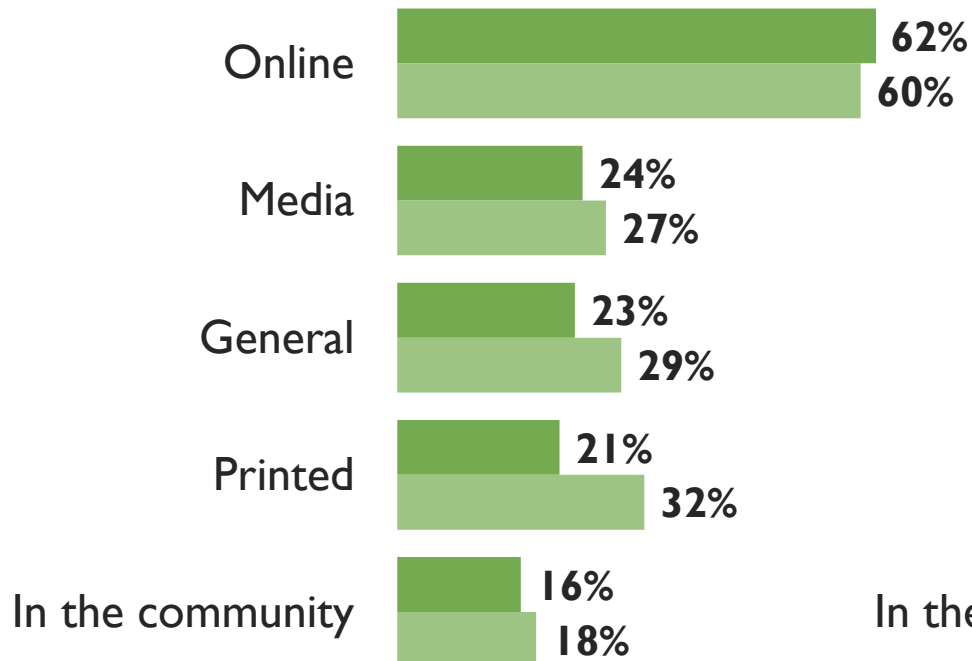
Online information continues to be preferred by both Londoners and visitors

Q. How would you prefer to find out information about The Royal Parks?

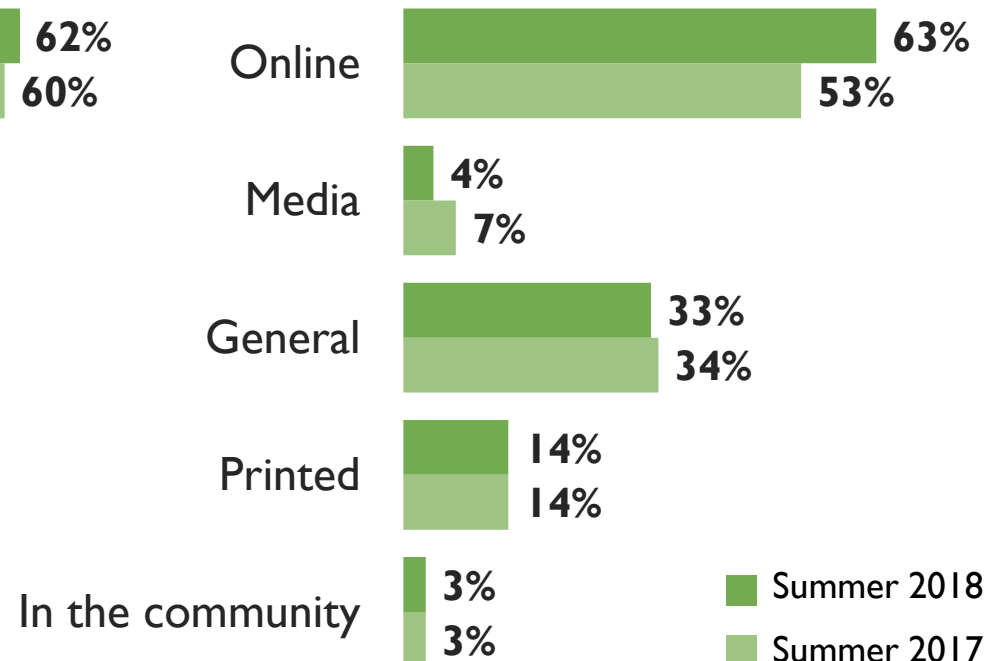
■ Autumn 2018

■ Summer 2017

Londoners



Visitors



Detailed preferences differ, with visitors preferring in-park signage to online

Q. How would you prefer to find out information about The Royal Parks?

Londoners	Summer 2017	Autumn 2018
The Royal Parks website	36%	33%
Social networking sites	19%	16%
Other website	12%	15%
Email	12%	14%
Newspaper advertising	13%	13%
Signage in the park	10%	12%
From family, friends or someone else	19%	11%
Local TV News	14%	10%
Leaflet/direct mail/flyer	19%	10%
Library	11%	9%
Online advertisement	10%	8%
Local newsletter	14%	8%
College/school	8%	8%

Visitors	Summer 2017	Summer 2018
Signage in the park	23%	28%
Other website	23%	27%
The Royal Parks Website	20%	21%
Social networking	8%	13%
Online advertisement	10%	12%
Email	3%	7%
Maps	5%	6%
Leaflet/flyer	6%	4%
From family/friends/someone else	10%	4%
Previous visit to park	6%	3%
Book/guide book/London pass book	3%	3%
Local newsletter	2%	2%
Newspaper advertising	4%	2%

General public living in London (537 in 2018 and 447 in 2017). Fieldwork dates: 26 October – 4 November 2018 and 18 August – 06 September 2017. Visitors to Royal Parks (1099 in Summer 2018 and 843 in Summer 2017). Fieldwork dates: 01 August – 10 September 2018 and 01 August - 05 September 2017.



THE ROYAL PARKS

Londoners' survey: key findings

- ❖ A large majority of Londoners think the parks are important for London, but most cannot name The Royal Parks as the organisation responsible for managing them.
- ❖ Londoners are less likely than in Summer 2017 to be able to name The Royal Parks after being prompted, though nearly half say they know about or have heard of the organisation.
- ❖ Of those who know about The Royal Parks, only three in ten knew it is a charity. Frequent visitors are more likely than overall to know about The Royal Parks and its charity status.
- ❖ Differing levels of engagement with The Royal Parks across waves suggests a more detailed survey of Londoners might be needed to unpick the results further.

Final thoughts...

- 🍃 The natural environment is important – it links to how people feel about the parks in general, and is a prime reason for visiting. For residents living near Hyde Park, the environment is one of the main concerns for those opposing events.
- 🍃 Locals who visit frequently are especially likely to give positive ratings, and are your most engaged audience. Recognition of The Royal Parks' role and charity status is strongly linked to visiting the parks frequently, and living locally.
- 🍃 In Hyde Park specifically, the range of events held are generally well supported by local residents, and perceptions that the concerts cause problems are improving.
- 🍃 The parks are important to Londoners, and continue to be viewed extremely positively by those who visit them – but there is more to do to unpick their views in detail.

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.

Survey of residents living locally to Hyde Park (telephone methodology)

Survey wave	Number of interviews	Survey dates
Winter 2013	412	13 February and 3 March 2013
Winter 2014	300	12 and 23 February 2014
Autumn 2015	300	12 and 26 October 2015
Autumn 2016	308	12 and 27 October 2016
Autumn 2018	300	26 September and 13 October 2018

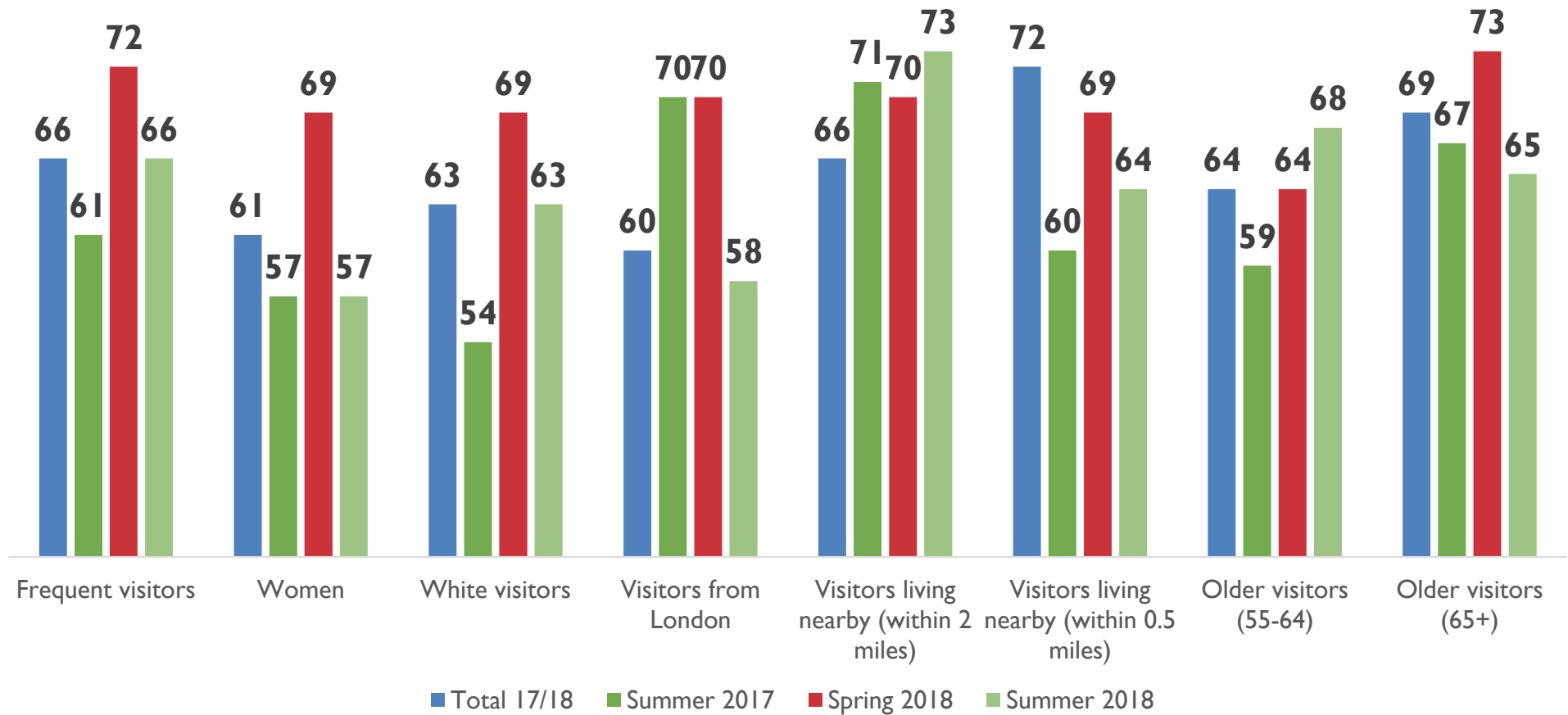


Survey of Londoners (face-to-face Capibus methodology)

Survey wave	Number of interviews	Survey dates
Summer 2017	447	18 August - 6 September 2017
Summer 2018	505	17 August - 12 September 2018
Autumn 2018	537	26 October - 4 November 2018



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



Base: All visitors to the eight Royal Parks in London excluding 'don't know' in Summer 2018 (1099); Spring 2018, 2018 (844); Summer 2017, 2017 (840).



THE ROYAL PARKS