

State of the Market Survey 2018

Local Authority Parks and Green Spaces Services



Briefing 18-11
March 2018



The state of the market survey was conducted by Wayne Priestley, APSE Principal Advisor for Environmental Services.

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Local Authority Parks and Green Spaces Services State of the Market 2018

APSE conducted an online survey between December and February 2018. This follows on from the 2017, 2016, 2015, 2013, 2012 Parks and Green Spaces State of the Market survey where similar questions were asked to allow for trend comparisons. Early briefings are available on the APSE website. The most recent briefings can be accessed at the links below:

- [2017 results briefing](#)
- [2016 results briefing](#)
- [2015 results briefing](#)
- [2013 results briefing](#)
- [2012 results briefing](#)

134 responses were received from local authorities throughout the UK which is a **31% increase** on 2017. This report identifies the key findings of the survey compared with previous findings.

Results from the survey

a) Your opinions

The table below shows the number of respondents who agree/disagree with the statements:

Answer Options	Agree strongly	Agree	Disagree	Disagree strongly	No opinion
The squeeze on public sector resources is affecting parks and green spaces disproportionately to other service areas	43%	32%	23%	0%	2%
Reductions in funding has resulted in a withdrawal of maintenance from some land and an increase in unmaintained land	40%	35%	20%	2%	3%
Lack of investment in parks and green spaces will have health and social impacts	72%	23%	2%	0%	3%

There is a clear link between parks/play provision and levels of crime/anti-social behaviour	31%	40%	9%	1%	19%
There's a limit to the extent to which volunteers can be involved in delivering parks and green space services	56%	39%	3%	1%	1%
The public should get free access to all parks	63%	28%	5%	0%	4%

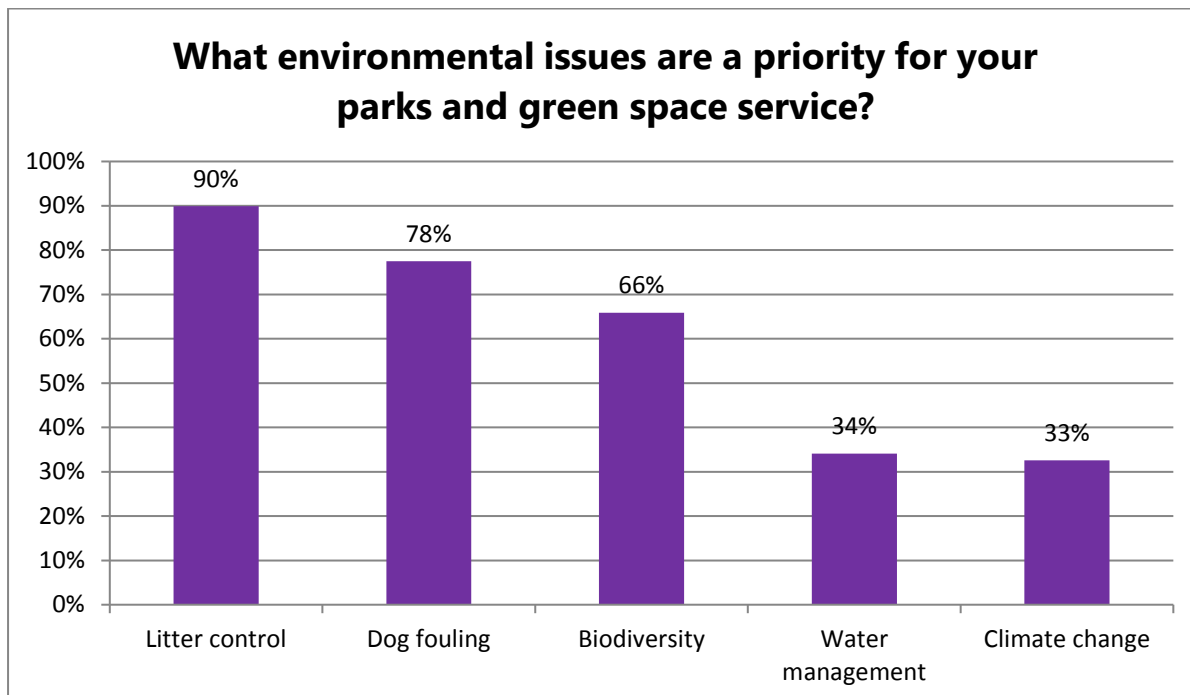
There has been a slight fall from 80% to 75% regarding respondents who either 'agree', or 'agree strongly' that 'the squeeze on public sector resources is affecting parks and green spaces disproportionately to other service areas. There has been a slight fall in the number of people who either 'agree' or 'agree strongly' that reductions in funding has resulted in a withdrawal of maintenance from some land and an increase in unmaintained land. This fall is from 78% in 2017 to 75% in 2018 however given the increased number of respondents the change is relatively minor overall.

95% either 'agree' or 'agree strongly' that the 'lack of investment in parks and green spaces will have health and social impacts' which is roughly the same as last year's results. Later in the report there is evidence that health funding towards parks development has increased, which does seem to imply stakeholders such as public health organisations, are now beginning to recognise the value of greenspace assets to their cause.

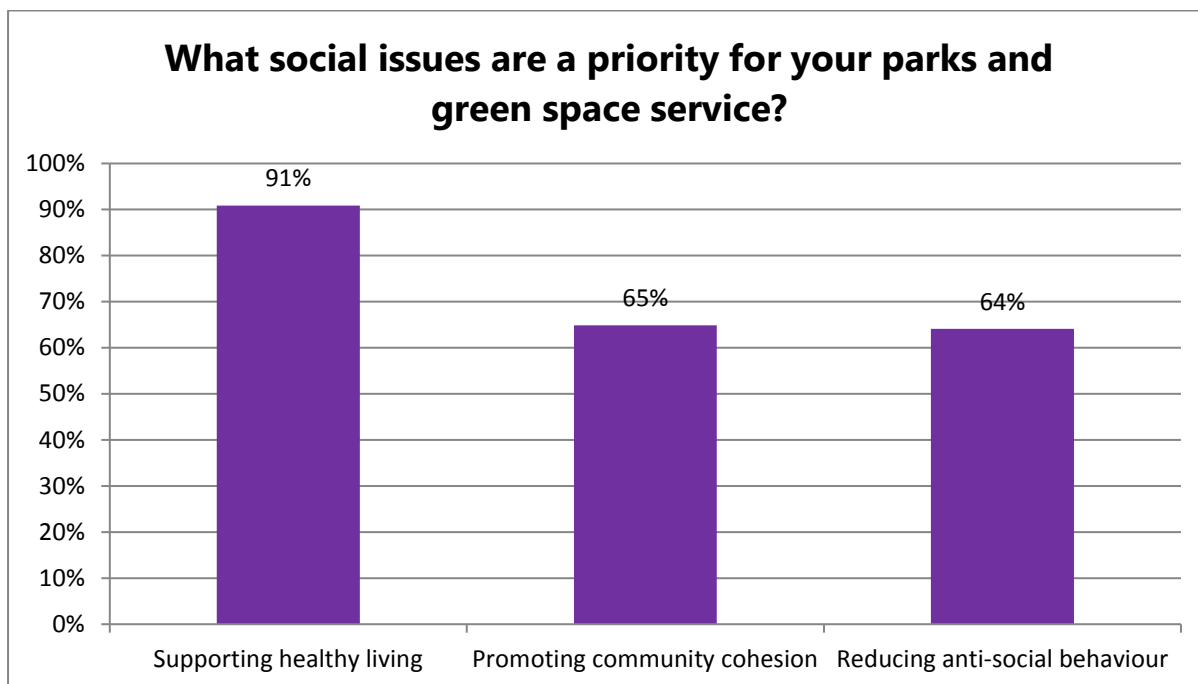
71% either 'agree' or 'agree strongly' that 'there is a clear link between parks/play provision and levels of crime/anti-social behaviour' which is a 1% fall on last year's figure. But the high level of agreement does imply this view is widely held.

95% of respondents either 'agree' or 'agree strongly' that 'there's a limit to the extent to which volunteers can be involved in delivering parks and green space services' acknowledging the importance of the continued need for a strong horticultural skills base being provided through local authority employees.

91% either 'agree' or 'agree strongly' that 'the public should get free access to all parks which is a 1% rise on last year's figures. This figure has continued to increase over the last several years, a strengthening of the view that Parks should remain free for the public to enter.



The main environmental priority for parks and green space services remains 'litter control' (90%), with 'dog fouling' a close second. The importance of promoting biodiversity has fallen slightly (68.5% in 2017). However, notably there has been an increase in the importance regarding the value of parks as ameliorating the effects of climate change' by over 11% from last year's figures, although water management has retained its importance with the same number of respondents identifying it as a priority. These increases are undoubtedly a reflection of growing concern about the adverse impact of climate change shown through the recent extreme weather conditions resulting in incidents of severe flooding in many areas. Parks and greenspaces are now being seen as major resources in promoting biodiversity and combatting the more extreme effects of climate change.



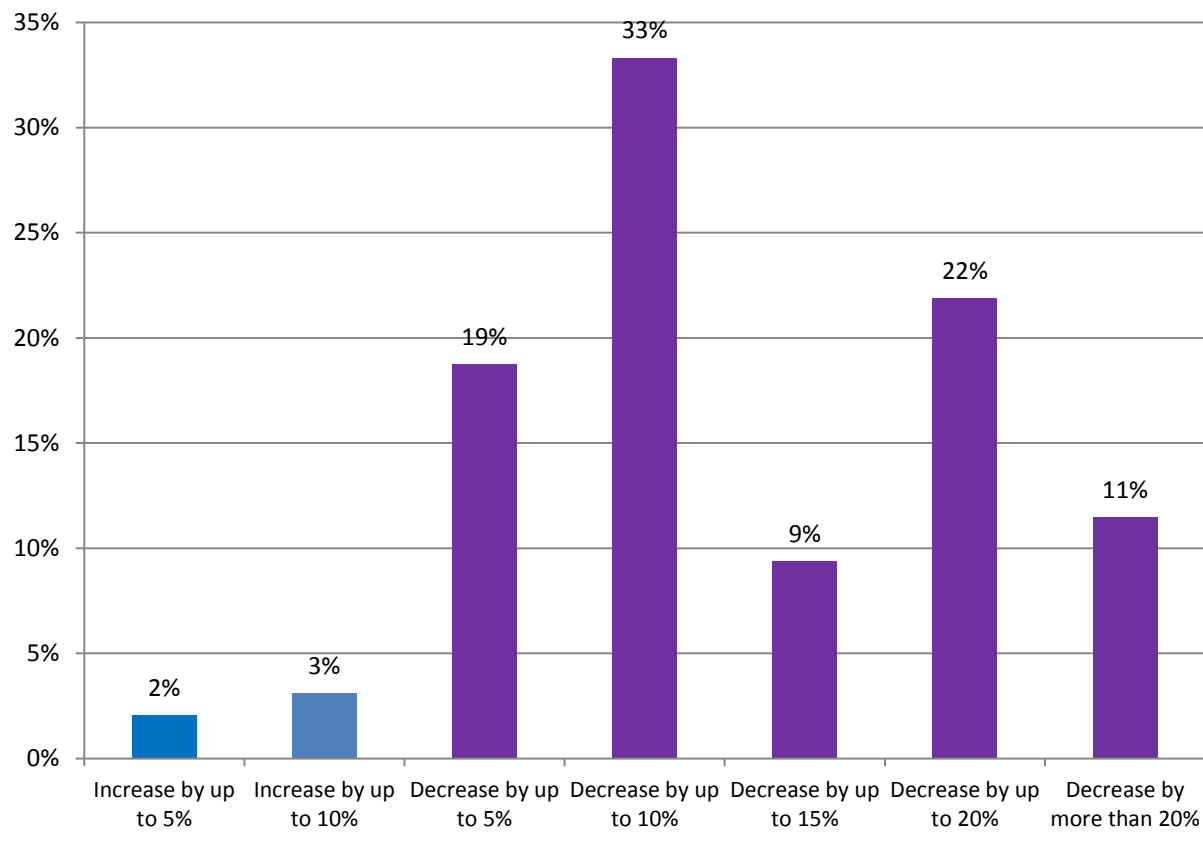
For the 2015 survey, we added a question on the social issues that are a priority for your parks and green space service. The most frequent response was 'supporting healthy living' which this year recorded 91% showing the recognition of parks and greenspaces to the public's health and well-being. This high response was followed by 'promoting community cohesion' and 'reducing anti-social behaviour'. Additional responses received included improving children's play options, creating beautiful areas to relax in and venues for community events.

Budget expectations

The number of respondents who expect the parks and green space budget to change over the next year has fallen significantly from last year reducing from 92% in 2017 to 81% in 2017/18. Of those who expected a change in the budget, 85% expect a decrease in revenue, which is a minor improvement on 2017 when 86% expected a decrease, and 69% expect a decrease in capital which is a slight rise on 2017.

In the next 5 years, the expectation of the level of funding in budgets are as follows:

What is your expectation of the level of funding in your service budget in the coming five years?



Respondents who answered 'decrease by more than 20%' expected a budget decrease from anywhere up to 50%. However the number of respondents who expect such a fall has reduced from 18% in 2017 to just 11% in 2018. However what is also noticeable is that the number who expect cuts between 15 -20% has risen to 22% for 2018 as opposed to just 16% in 2017. This does suggest that those expecting harsher cuts are now fewer but the number expecting cuts under 20% is still high, almost 2% higher than in 2017.

Respondents are currently looking at a range of efficiencies to address these reductions, and these include:

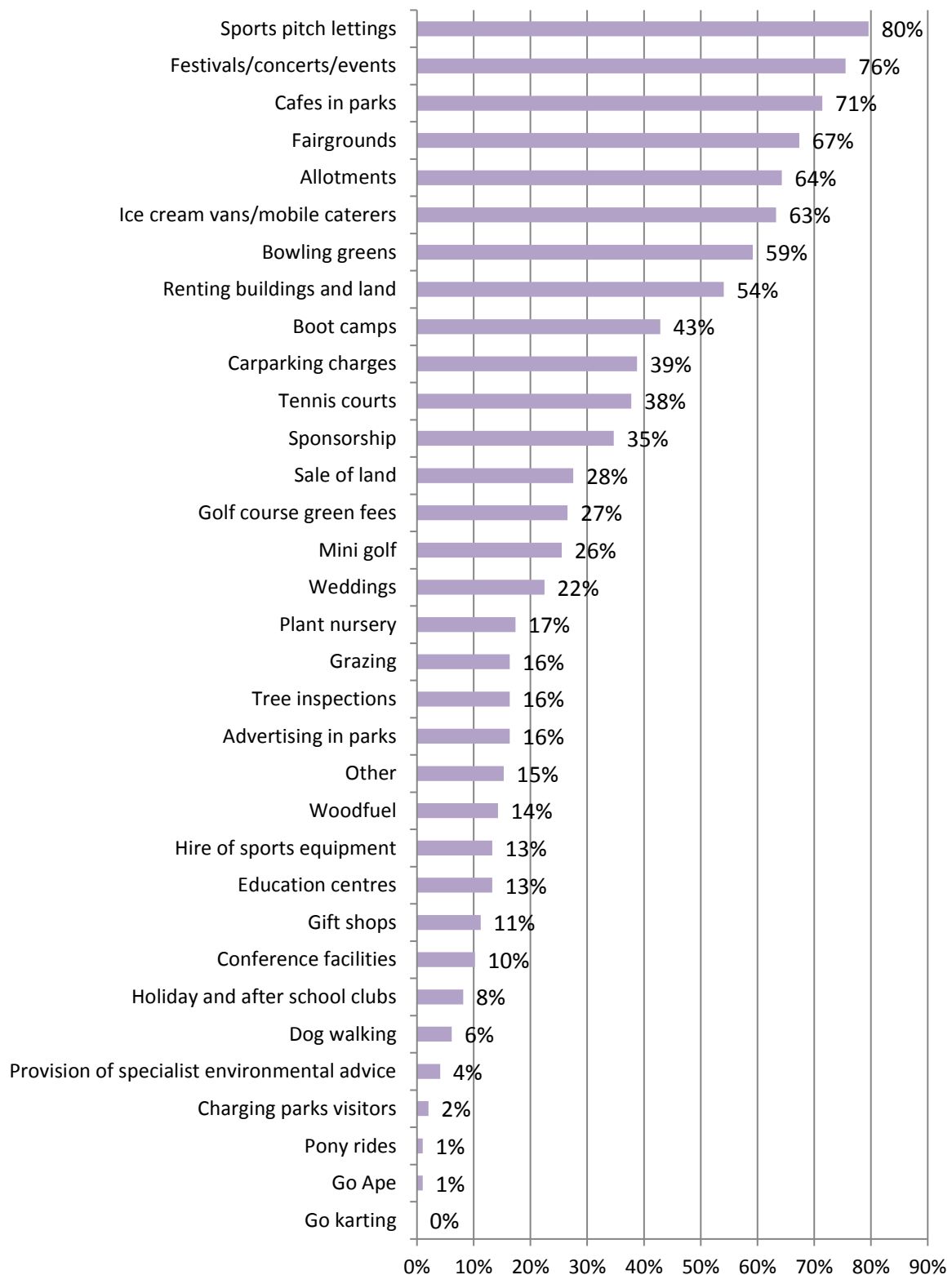
- Rethinking staffing levels through reducing management tiers, cutting administrative staff, reducing IT/communications systems updates, introducing larger seasonal staffing to replace core workforce, increasing volunteering opportunities, introducing role flexibility)
- Commercialisation of operations
- Operational changes (moving allotments to self-management, changing horticultural standards to deliver better biodiversity and sports pitch maintenance, reducing grass cutting and increasing tree planting, reductions in

bedding plants and replacing them with use of wild flower meadows, replacing annual planting schemes with perennials, prioritising maintenance on greatest need/impact on Council priorities)

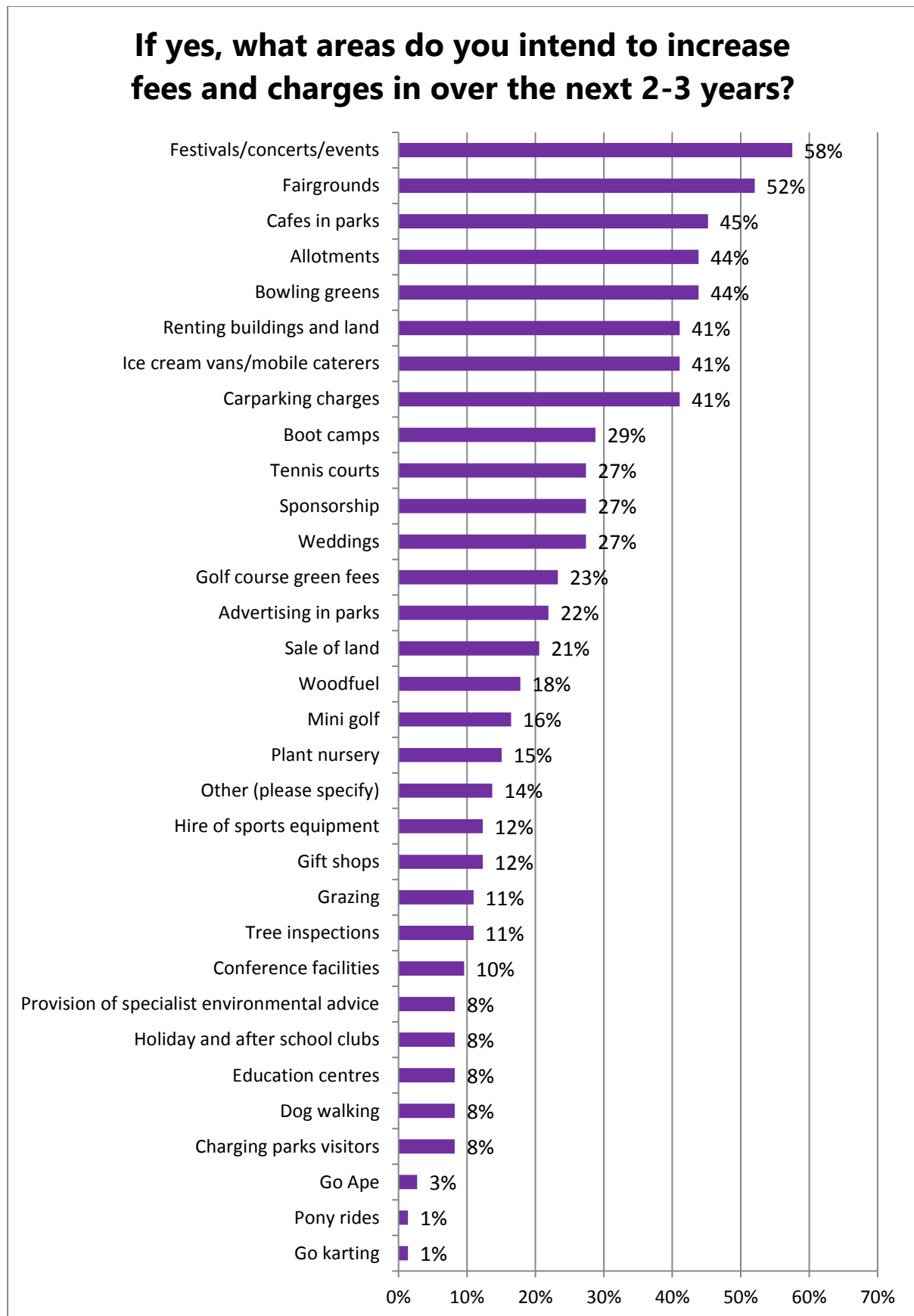
- Shared contract procurement with neighbouring local authorities
- Increased commercialism (encouraging other authorities to contract council services so income generated can be invested back into the service, increasing local business sponsorship, targets for income generation)
- Decreasing subsidised activity (either by increasing allotment/sport charges, charging for car parking)
- Reductions in services (play area and toilet provision)
- Asset transfer of buildings and facilities within parks (cafes, bowling greens, etc.)
- Promotion of sponsorship and donation opportunities
- Introducing new forms of land management such as grazing which results in an income.
- Bringing services back in-house to reduce contractor costs and increased flexibility opportunities, particularly in light of Carillion collapse.

Areas where respondents currently generate income through fees and charges (either provided in-house or through a franchise), include the following:-

What areas do you currently generate income in through fees and charges?



Areas where respondents intend to increase fees and charges over the next 2-3 years include:



Respondents identified several barriers to generating income, these included:

- 53% cited 'competing priorities (e.g. budget cuts)' similar to 2017, 'a lack of time,' at 50% is slightly higher than 2017.
- 'experience of staff in bringing in new income' 49%, an increase on 2017 when the figure was 44%, (suggesting staff are still requiring better skills at raising income),
- 'political resistance' 47%, a fall on 2017 when this stood at 48%- suggesting politicians are perhaps becoming concerned about ensuring free access to parks whilst still acknowledging the need to generate income to offset budget gaps.
- 'public resistance' 53% a significant increase on 2017 when the figure recorded was 38%, and finally,
- 'lack of investment funding' at 40% a reduction on 2017 when the figure stood at 49%

Other responses included a lack of realistic opportunities available to a small department, a lack of managerial will, the public service ethic being difficult to overcome and reductions in staff numbers.

Aside from income from fees and charging, the majority of parks obtain additional funding from

- 'Section 106 money' 82% a fall on 2017 when 89% reported monies from S106 funding.
- 'National Lottery Heritage Fund' (62% up from 60% in 2017).
- The number of respondents receiving income 'through friends of parks groups' has risen to 66% as opposed to 59% in 2017
- Grant funding from other sources has risen since 2017 (52%, from 51% in 2017).
- Sponsorship' was received by 41% which is a 7% fall on 2017 when the figure stood at 48%.
- Figures for 'health funding' saw a real increase with 27% receiving funding from this source as opposed to 18% in 2017.
- 'sale of assets' (e.g. timber) fell from 29% in 2017 to 19% in 2018.
- 'private funding' fell by 2% to 10% against the 12% of respondents who received monies from this source in 2017.

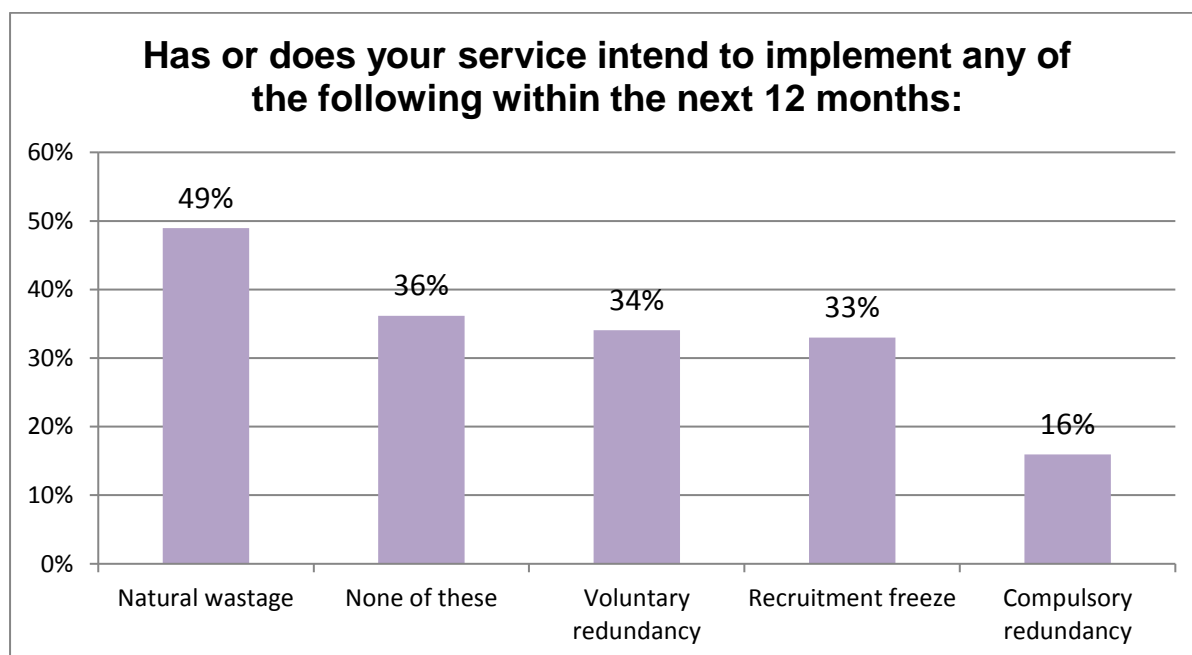
Respondents were asked whether they sold their services outside of the Local Authority. 24% currently sell services to the 'private sector', a significant decrease on 2017 when over 35% recorded selling services outside the local authority, with 29% currently selling services to 'other local authorities', the same as 2017. The most

noticeable decrease has been selling services to 'other public sector bodies' which has seen an fall of 14% (33% in 2017)

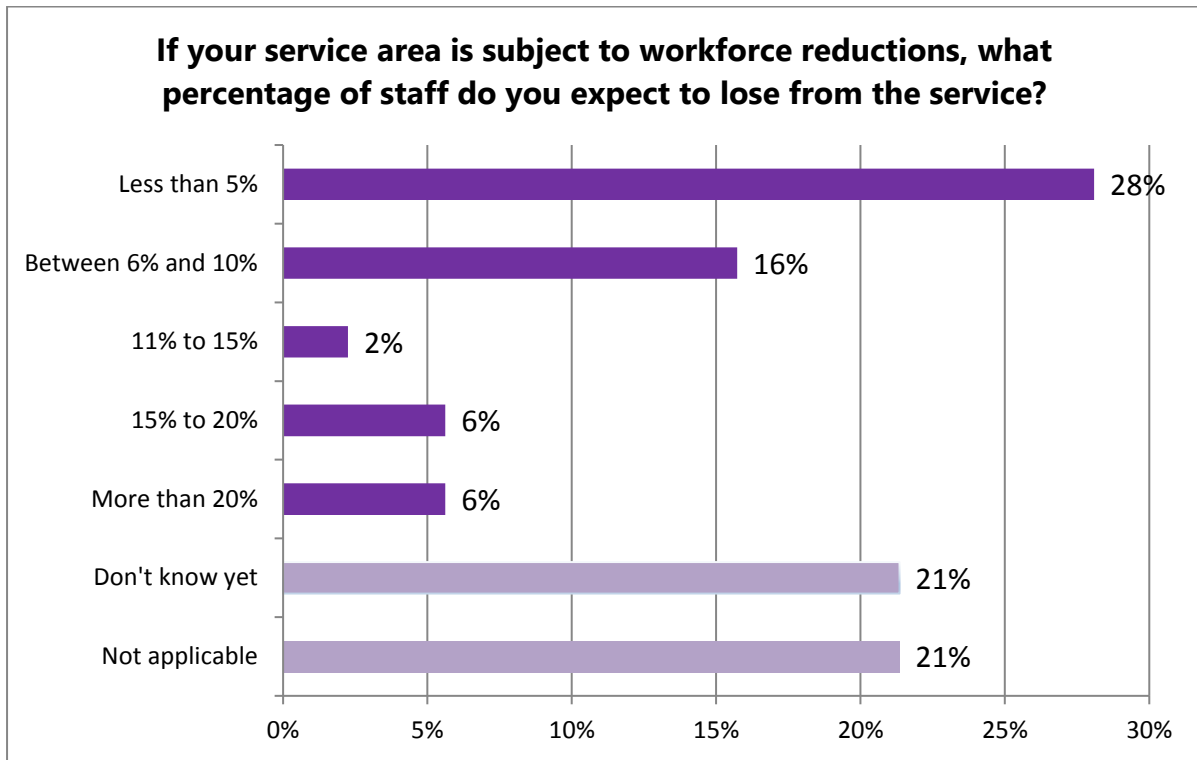
58% of respondents indicated that their local authority does not sell their services to any of the above which is a significant increase from 44% in 2017, and somewhat surprising considering the ongoing level of budget cuts parks continue to receive.

b) Staffing

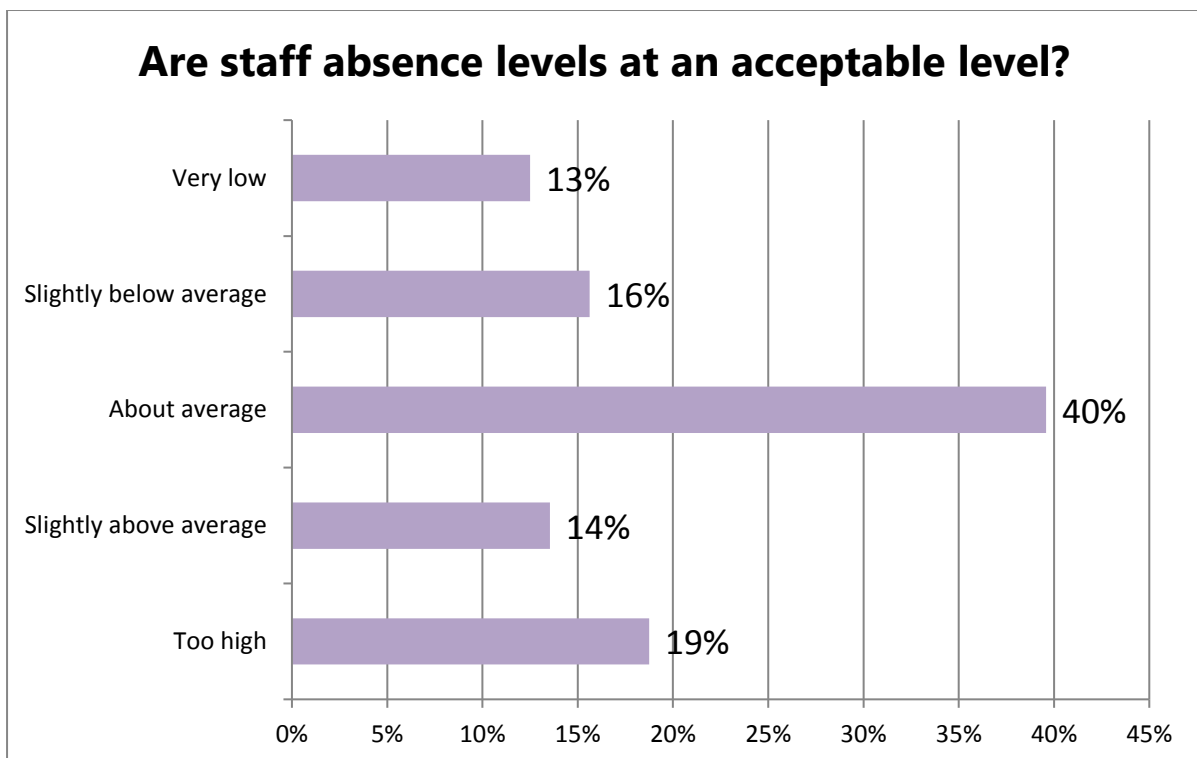
In terms of staffing, the survey asked if respondents have or intend to implement any of the following within the next 12 months and the results are as follows:



Respondents who were expecting staff reductions were asked what percentage of staff they expect to lose from the service, and the results were as follows:-



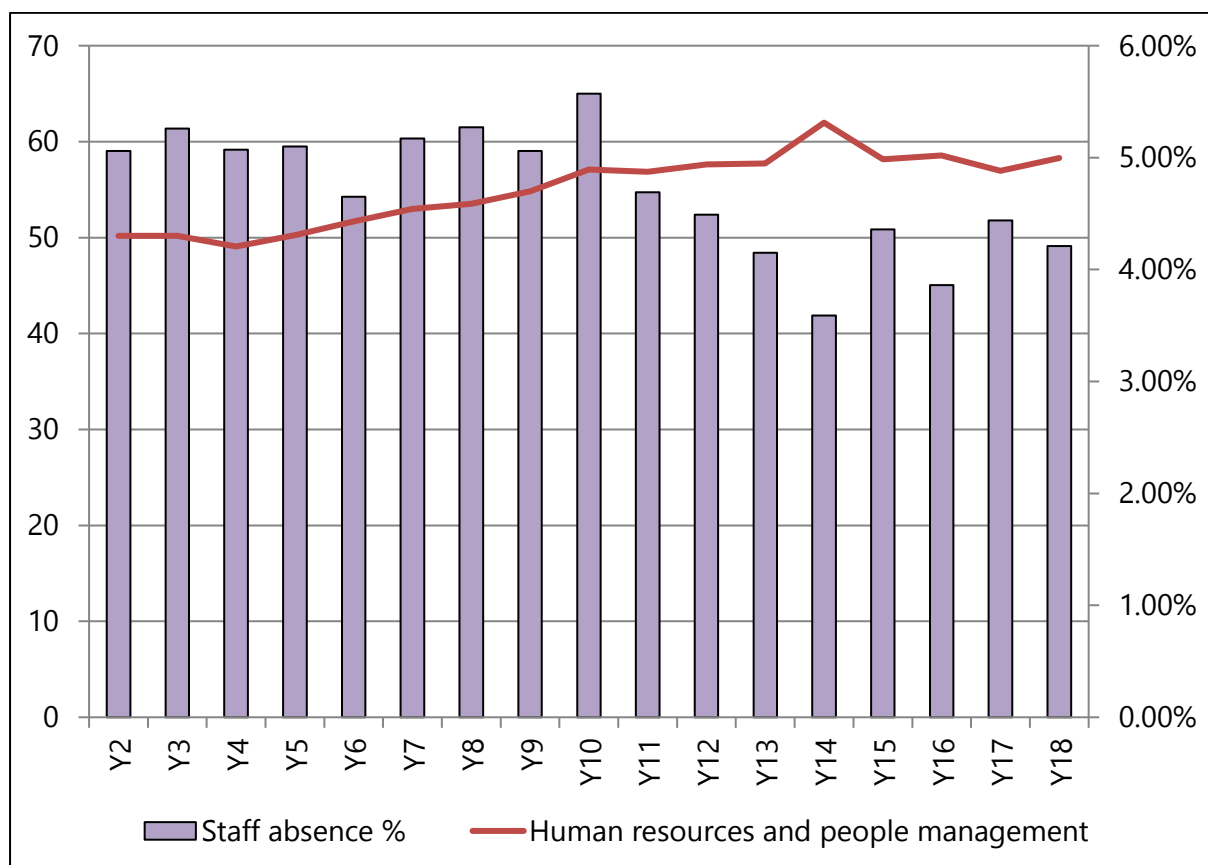
The outlook of respondents since the 2017 results survey could be seen as more positive, this could be seen as a sign that staffing levels are stabilising with fewer councils looking to reduce staffing levels beyond those expected.



There has been an improvement in respondents reporting staff absence levels as about average 40% in 2018 as opposed to 31% 2017, which suggests an improvement in attendance levels. 33% reported absence levels as being either 'too high' or 'slightly

above average' with 29% reported absence levels as being 'very low' or 'slightly below average.'

APSE's benchmarking service [Performance Networks](#) has shown that staff absence is now standing at 4.21% (down 0.20% since 2016) for Year 18, which is well below the recorded high of 5.57% in Year 10. The average performance score in human resources and people management rose to 58.28 (up 1.33 since 2016). The following chart has been extracted from APSE Performance Networks data collected between Years 2 and 18 using PI 13a – Percentage staff absence and PI 16 – Human resources and people management.



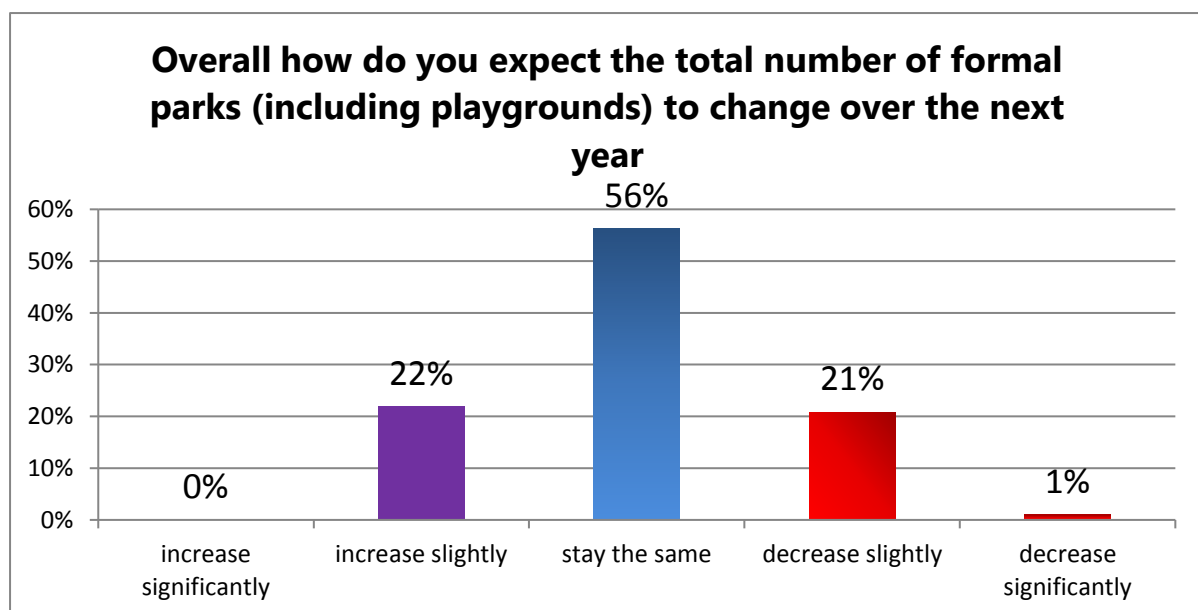
In terms of training, 71% thought that the training budget will stay the same over the next 12 months and 20 % thought that it was going to decrease, which is in line with the 2017 survey results.

49% of respondents stated that they currently have apprentices which is a fall of 6% on 2017, and 60% are planning to recruit apprentices in 2017-18 which is a significant rise compared to 38.2% in 2016/17. Of those that hadn't retained all apprentices from the last recruitment round, they stated that this was dependent on suitable vacancies being available and the achievement of good standards of workmanship. Responses on future plans for apprentices indicated that the majority of respondents are maintaining apprenticeship programmes. Other responses included seeking to

increase numbers if budgets allow or in some cases having to either reduce numbers or terminate the programme altogether.

c) Numbers of parks and visitor numbers

The State of the Market survey has tracked the change in responses since 2008 to the question 'Overall how do you expect the total number of parks (including playgrounds) to change over the next year?' 56% of respondents expected the total number to stay the same, as opposed to 44.7% in 2017, with 22% expecting a slight or significant decrease as opposed to 25% in 2017 and the remaining 22% expecting a slight or significant increase over the next year which is a 10% rise over the past two years.



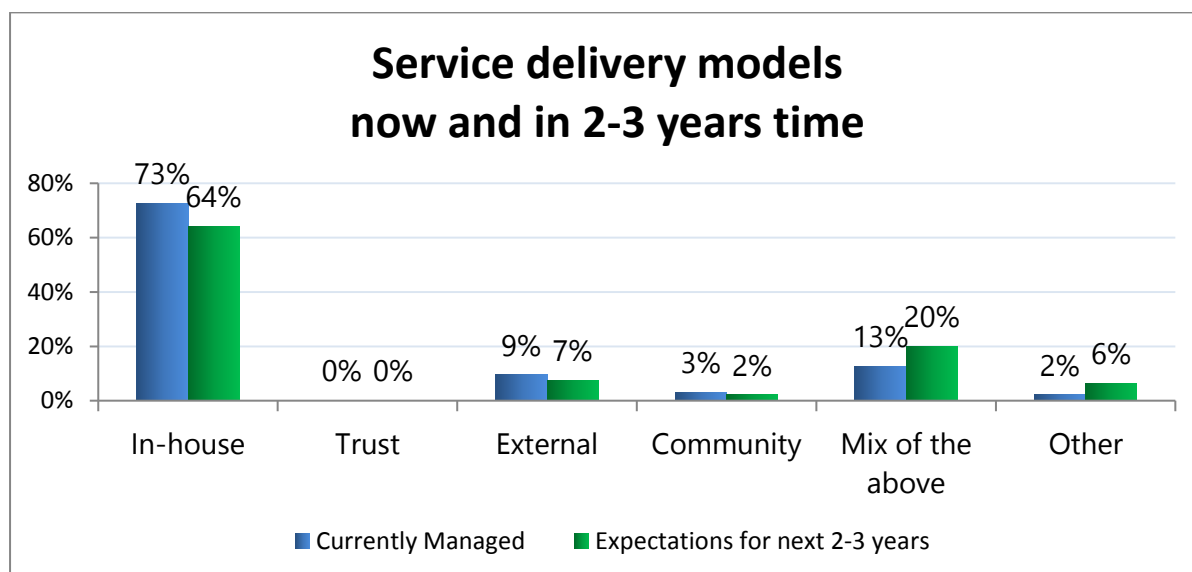
When asked about the number of visitors to formal parks during the past year, 60% said they had seen increases. 39% felt visitor numbers had remained the same which is a 4% increase on 2017. Only 1% believed visitor numbers had decreased.

Only 33% of survey respondents monitor visitor numbers through a mixture of footfall/visitor/gate monitors, car monitors/car park payment monitors, audits and visitor surveys. Better visitor number monitoring is crucial if parks managers are to argue that these assets are well used and therefore worthy of ongoing investment and protection.

d) Service delivery

73% of respondents currently have in-house services (up 2%), and 64 % expect this to be the case in 2-3 years' time, which is a significant increase on 2017, when only 48% expected in-house service provision to be the likelihood in 2-3 years' time. When asked

how respondents expected the service to be managed in the near future, 35% expected a mix of in-house, trust, external and community management the same score as 2017.

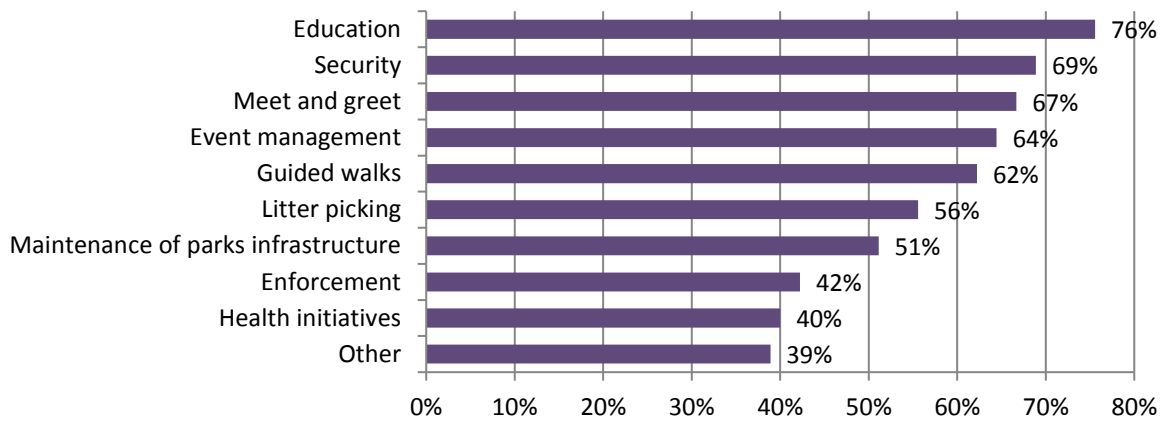


The bullet points below provide a useful summary of what is being delivered within the parks service and how it is being delivered according to those who responded to the survey:

- 62% have dog control orders in parks and green spaces and 63% have on the spot fines for litter/fly tipping; 24% have none of the above
- 68% use seasonal labour. Of those who have seasonal labour, on average 20-25% of their workforce are employed on these terms
- 48% have annualised hours. Of those who have annualised hours, on average over 70% of their workforce are employed on these terms

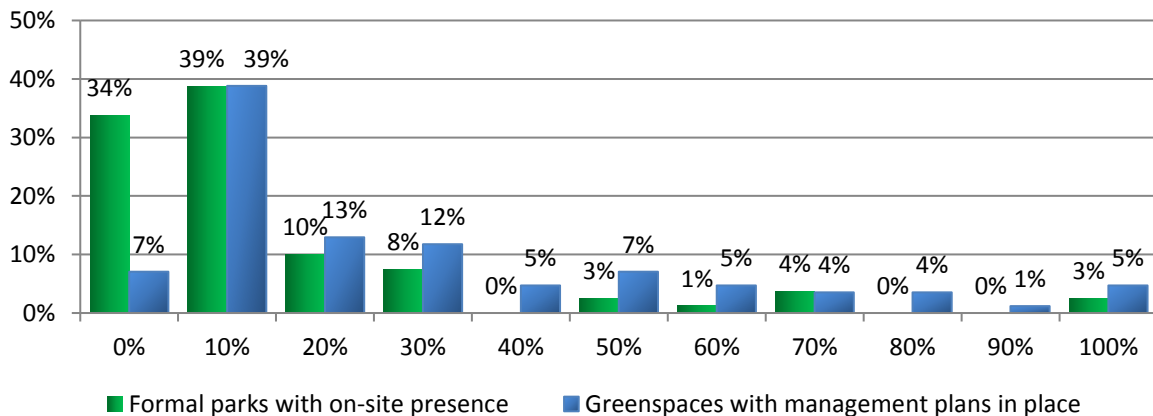
47% reported having parks rangers, but 85% reported having decreased ranger numbers over the past 3 years through a mixture of natural wastage and budget reductions. The ranger service carries out a range of functions including:

What type of activities does the ranger service carry out?



When asked about the proportion of formal parks which have an on-site presence and the proportion of greenspaces that have management plans in place, respondents answered:

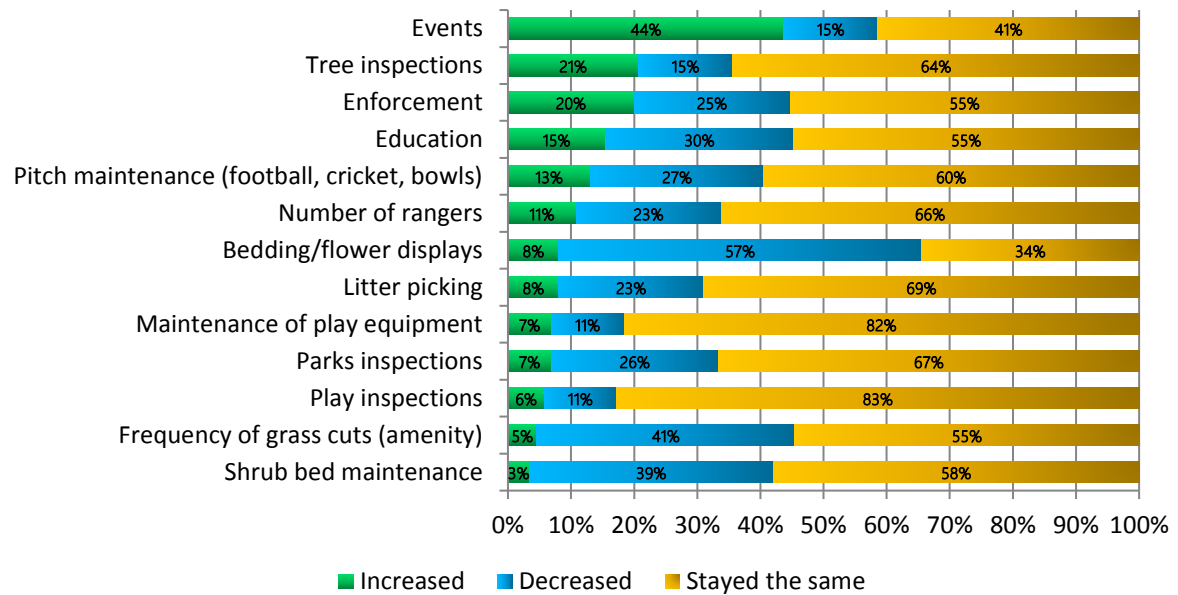
Proportion of formal parks with on-site presence and greenspaces with management plans in place



e) Service standards and quality of service

The survey asked, over the past year, which services have increased, decreased or stayed the same. The respondents answered:

Over the past year, have the following increased, decreased or stayed the same?



The main areas of increase were:-

- Events
- Tree inspections
- Enforcement and education

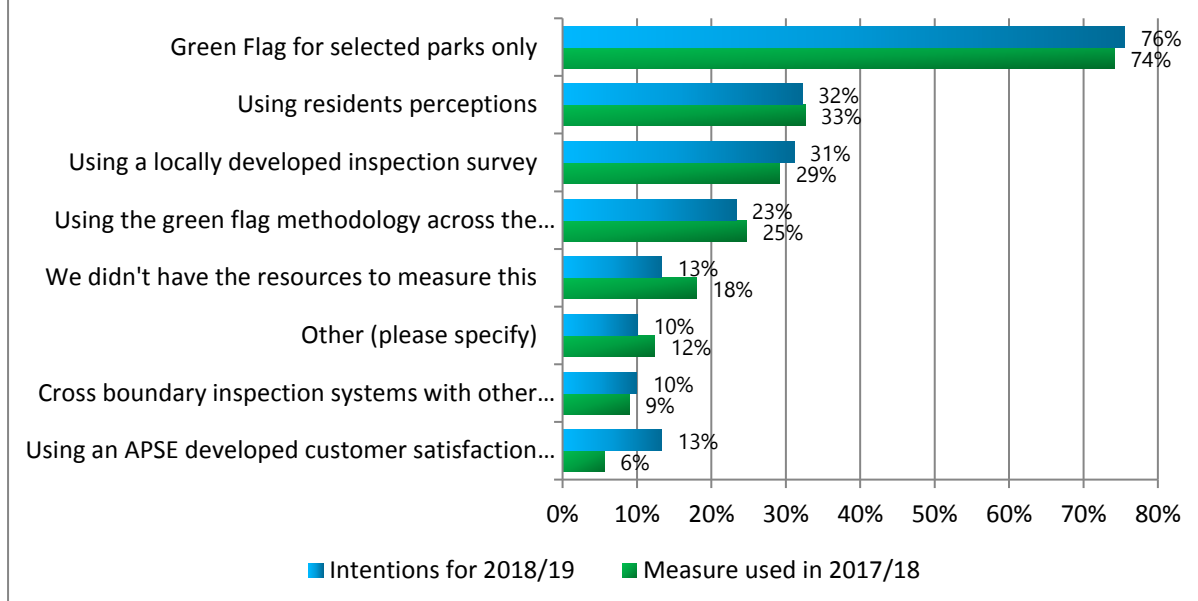
The main areas of decrease were bedding/flower displays, frequency of grass cuts, shrub bed maintenance and pitch maintenance.

In this year's survey, we asked for respondents to state their average number of grass cuts (amenity) per annum. Although a number of cuts depends on a range of factors from weather conditions and land use, the average was 16 cuts, with 15% stating 8 cuts or less, 11% stating 14 cuts, 9% stating 10-15 cuts.

10% used Cylinder machines for estate and highways grass cuts, 22% used Rotary, 4% used Flail and 64% used a mixture of the above.

The survey asked how quality of parks was measured during 2014-15 and how respondents intended to measure this in 2017-18 and the results were as follows:

How did you measure the quality of parks during 2017-18?



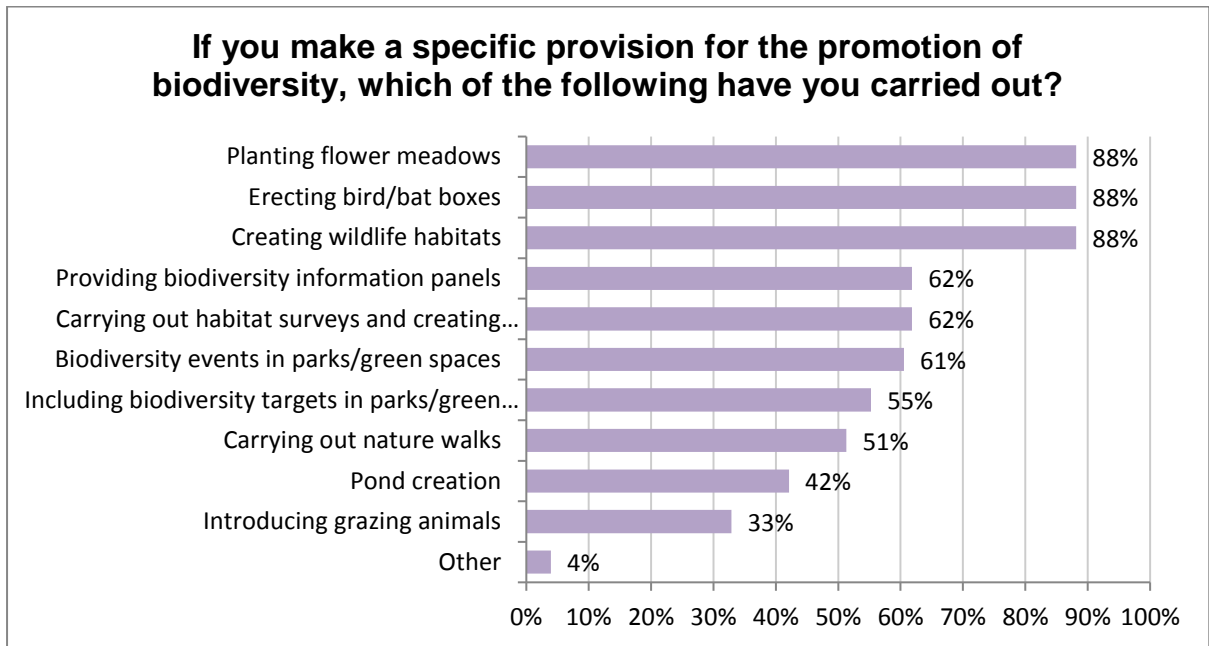
Respondents' intentions for 2018-19 saw a slight rise in 'Green Flag for selected parks only.'

Slight rises also occurred in 'using a locally developed inspection survey'. Fewer respondents intend to use 'resident's perceptions' than in 2017. 'Cross boundary inspection systems with other neighbouring councils' increased.

APSE believes it is vitally important within the current economic climate for Councils to continue to measure the quality, cost-effectiveness and customer satisfaction of parks. APSE offers a performance benchmarking service for parks, horticulture and open spaces called Performance Networks and runs the Land Audit Management System (LAMS), which allows local authorities to closely monitor their parks and green space performance. The use of APSE's LAMS system has doubled over the past two years and with the introduction of an App to reduce paper recording requirements, it is expected this will lead to further increased usage over the next twelve months.

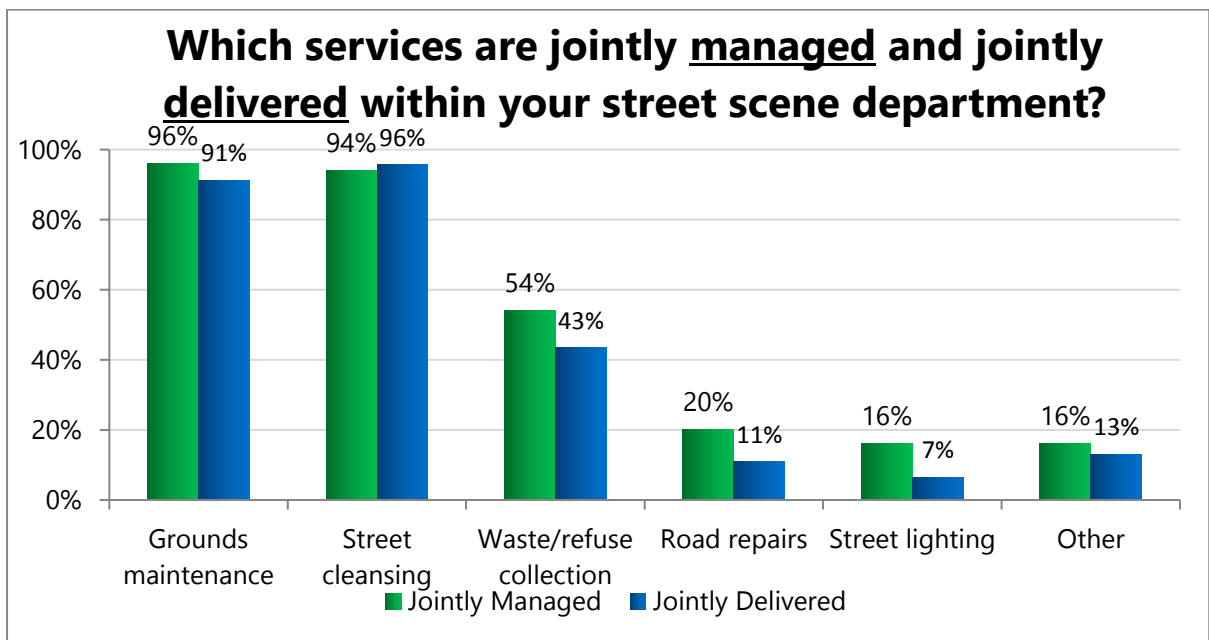
f) Biodiversity

Almost 80% of respondents make a specific provision for promoting biodiversity in parks and green spaces. Of those that make specific provisions, the respondents have carried out the following:-



g) Integrated street scene services

56% of respondents are already part of an integrated street scene service, as opposed to 42 % in 2017. This integration involves the following services being jointly managed or delivered:



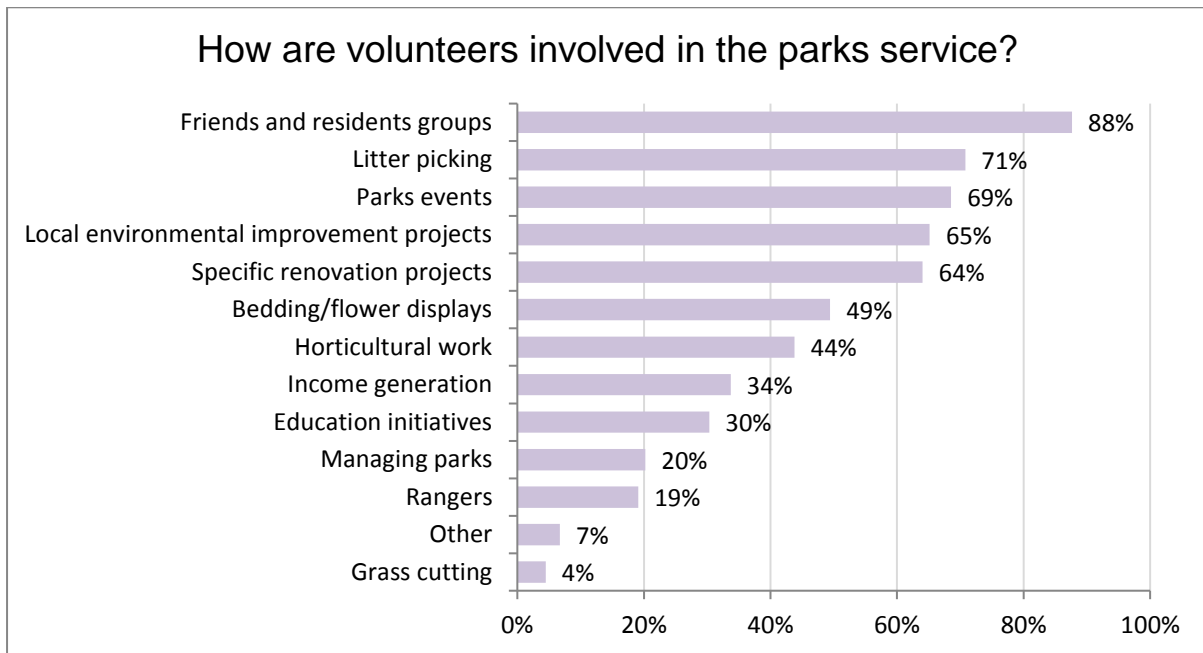
The largest areas of increase in the joint delivery of services are with regards to road repairs (6.5% in 2017); the management of street lighting has risen (6.5 % in 2017).

Out of the respondents who answered that they are not already part of an integrated street scene service, 24% expect to become part of an integrated service in the near future (a rise of 2% on 2017).

h) Community and volunteer involvement

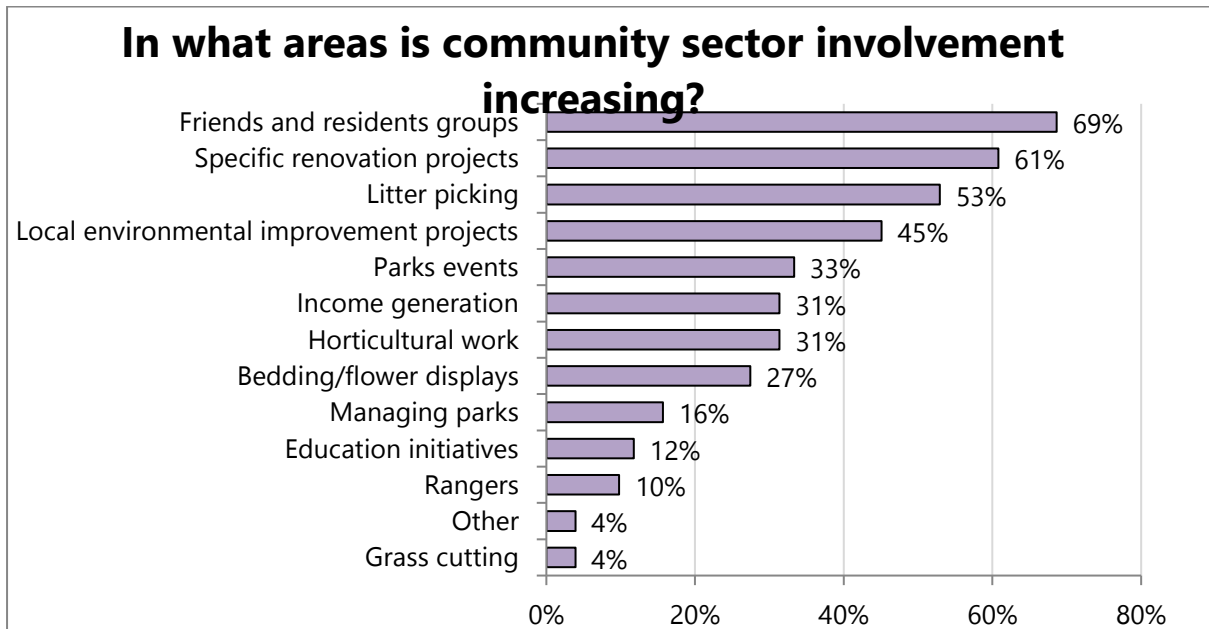
91% of respondents had friends of parks groups operating in their localities a fall of 2% on 2017 figures.

The survey asked how volunteers are involved in the parks service and results were as follows:

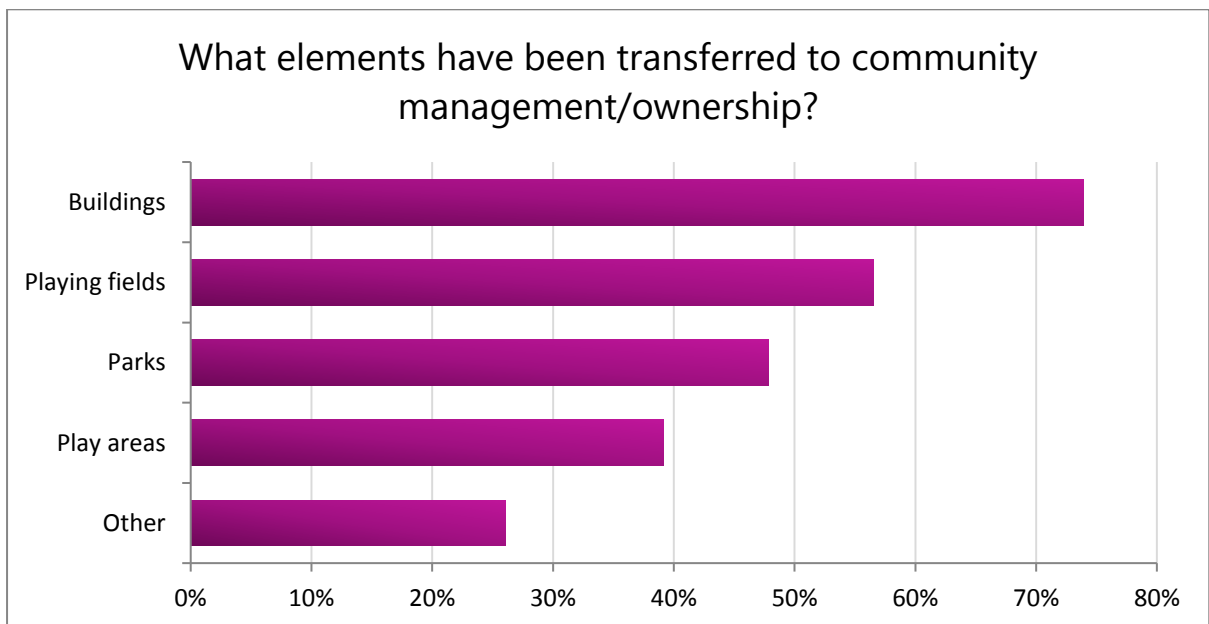


The results show that volunteers tend to be involved more in friends and residents groups (88%) and specific projects like parks events (69%). There has been a fall in the number of volunteers involved in litter picking (71%, down 6% on 2017), education initiatives (30%, down 5%) and managing parks at 20% up 3% on 2017).

59% of respondents thought that community sector involvement in parks is increasing either slightly or significantly in the following areas:



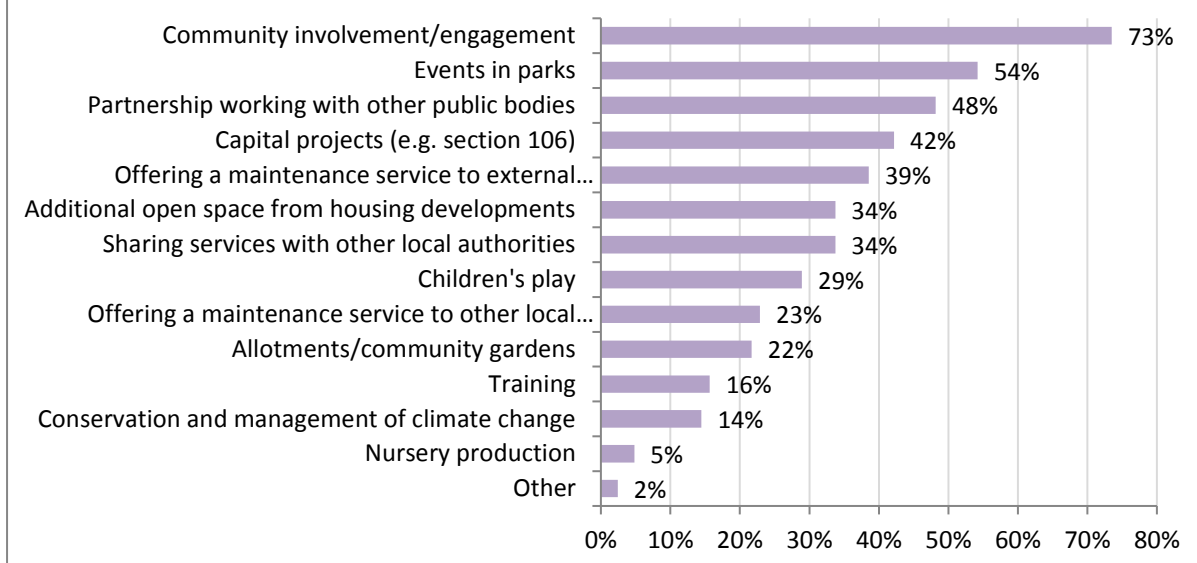
When asked 'during the past 2 years whether your council transferred any of its parks assets to community management/ownership', 23% said yes (a significant fall on 2017 when the figure was 35%) and 29% said their council is looking at this (a 2% rise on 2017). Respondents stated that the following elements had been transferred to community ownership:



i) Future growth and decreases in work for the service

Respondents were asked where they saw growth for the service over the next 12 months and the results were as follows:

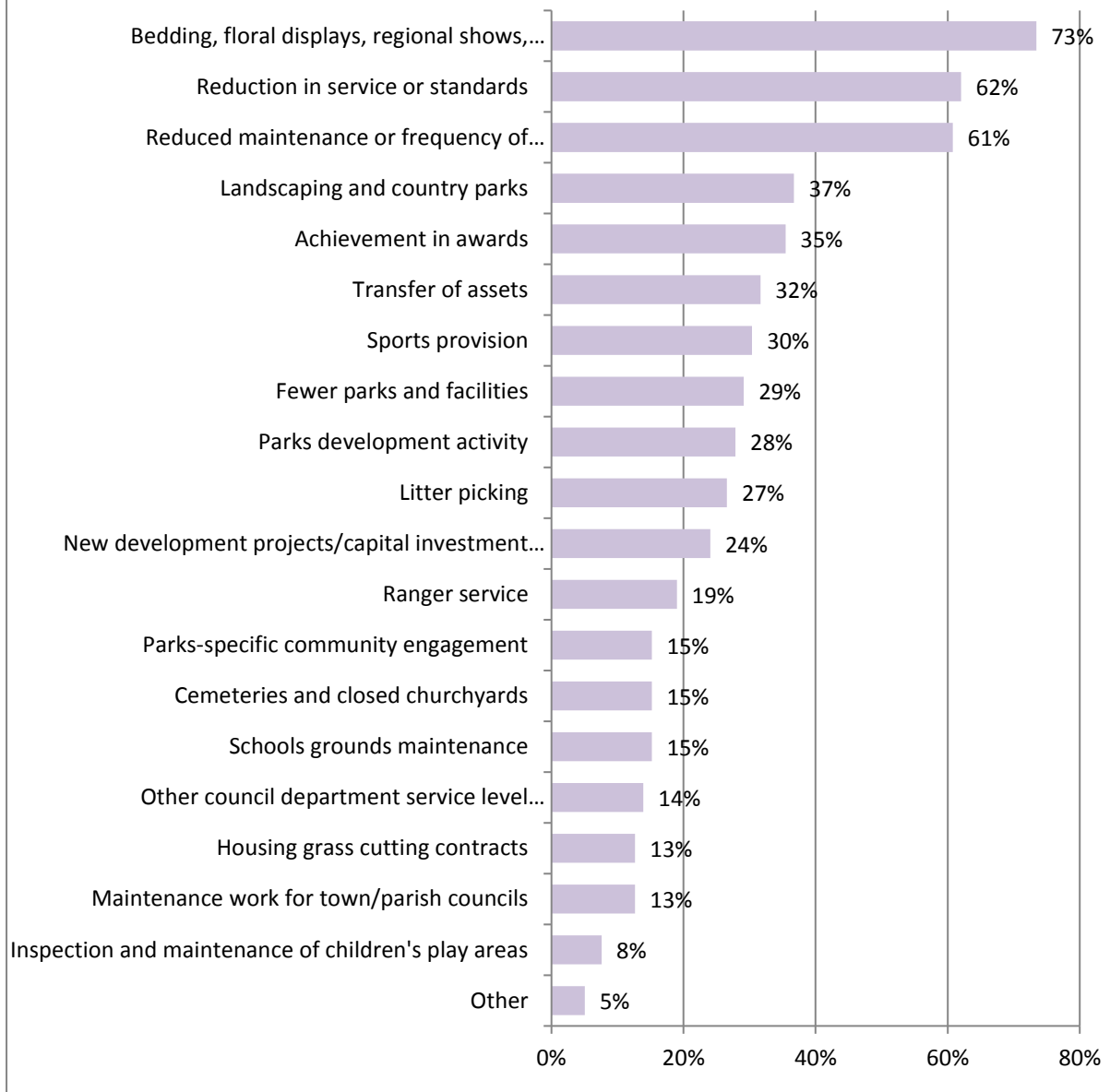
Where do you see growth for the service over the next 12 months?



The most notable changes on 2017 are with regards to growth in the areas of community involvement/engagement, sharing services with other local authorities, providing events in parks, creating children's play facilities and more capital projects.

The survey also asked where they saw future decreases in work for the service and the breakdown is as follows:

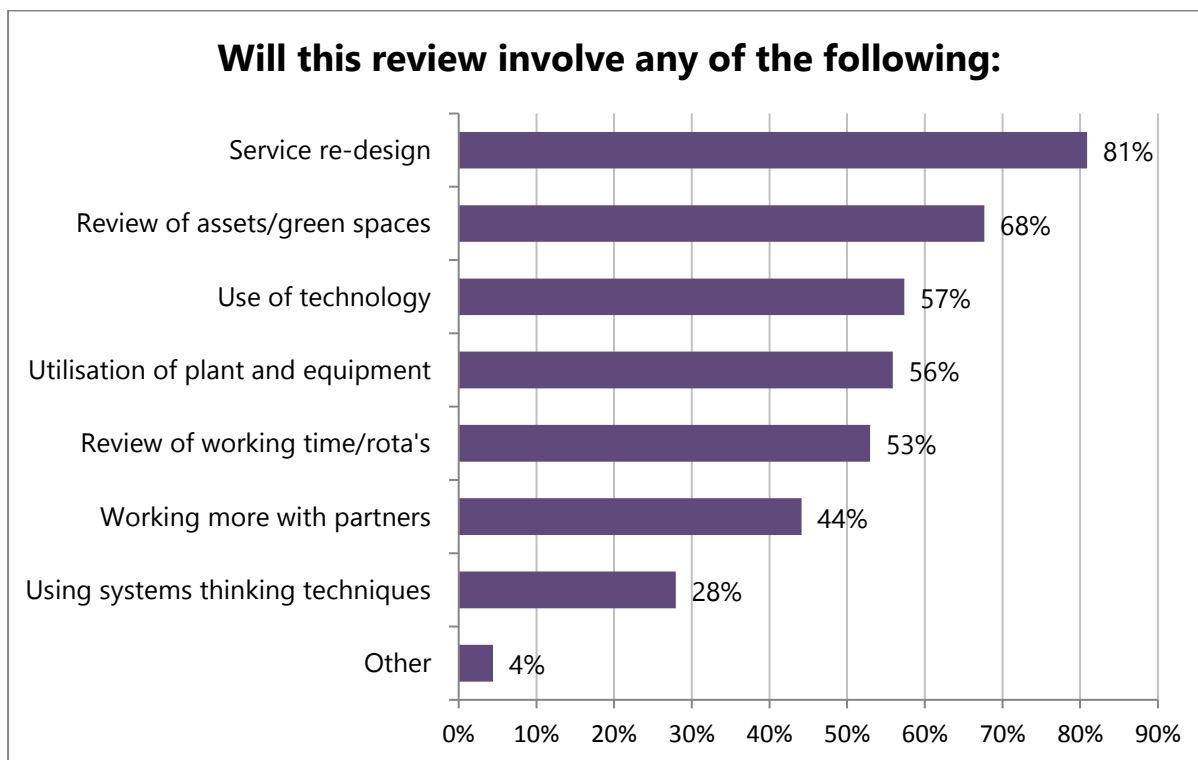
Where do you see future decreases in work for the service?



The main areas where most people recorded higher response levels with regards to decreases in work than 2017, were maintenance work for town and parish councils and also landscaping works and country park improvements/maintenance.

j) Service reviews

26% of respondents had recently completed a service review, 36% were currently underway and 26% plan to do so in the next 1-2 years. According to respondents, these service reviews will involve the following:



APSE Comment

It is quite clear that despite ongoing service budget cuts, managers and front-line staff are continuing to provide quality parks and greenspaces. However there is a real risk that service quality will diminish as a result of the ongoing pressures on budgets, changes to maintenance frequencies and a need for investment.

Local councils are working hard to meet these challenges through making efficiencies and looking for income generation opportunities to plug funding gaps. It is therefore welcome that within the survey examples of income generation and the acquisition of additional funding is growing, as local authority parks staff become more adept at generating additional income. Equally there are signs that the level of budget cuts previously anticipated may be less severe than initially thought with average cuts of between 5-10% becoming the most anticipated.

As recent changes to local government finances indicate, councils will be increasingly reliant upon business rates retention and local housing taxation; the value of a quality greenspace should not be underestimated in its ability to attract commercial investment and new housing developments. Therefore, ongoing cuts to these services could have much wider implications for local councils if this leads to areas being unattractive to new businesses, as well as new residential areas.

The growing need to recognise the value of our parks and greenspaces both to public well-being and health and also to our local economies, has been increased following the recent Parks Inquiry reports and is now firmly on the Government's agenda through the work of 'The Parks Action Group' on which APSE represents its member local councils.

It is also apparent that the use of volunteers is growing in importance, however it has to be realised that these resources are often only available for localised projects and will not be enough to be a credible alternative to area-wide front-line local authority staff. Therefore the transferring of responsibility of our greenspaces needs to be considered carefully if free access is to be maintained. The recent Parks Inquiry, although considering the need for mixed models in parks management, nevertheless still points towards ownership of parks being the role of local authorities, where the skills and resources still lie.

It is not surprising that reducing standards and reduced facilities are common themes in comments recorded in the survey. As a result of ongoing budget cuts it will be critical that service resources are targeted more effectively in those areas where public use and greenspace maintenance need is at its highest. Therefore new management approaches may need to be introduced which allow reduced costs whilst still maintaining quality, for example such as moving towards naturalised planting, wild flower meadows and so forth.

There is a growing demand from the public for access to greenspaces as our roads become congested and financial constraints in the home mean people are more-need of free access to pleasant and accessible greenspaces. Local authorities are successfully introducing new and innovative ways to sustainably manage parks whether this be through income generation, partnerships or alternative forms of funding. Local councils are also promoting the multiple benefits that greenspaces provide to other stakeholders and gaining funding from these sources in recognition of these benefits e.g. exercise and well-being, flood alleviation, climate change amelioration, social cohesion and so forth.

APSE feels there needs to be a balanced and proportionate response to the many concerns being raised about the future of the UK's public parks. From the results in this survey it is hoped that the positive and innovative work local authorities are continuing to deliver, as part of their desire to maintain cleaner, greener and safer parks and green spaces, in spite of the impact of austerity, will come to fruition. It is envisaged that Government and other stakeholders will, in recognition of this innovation and best practice, ensure support for local authorities and their parks managers, in developing a sustainable future for the UK's parks.

Get Involved

APSE member authorities have access to a range of [membership resources](#) to assist in delivering council services. This includes our regular advisory groups, specifically designed to bring together elected members, directors, managers and heads of service, together with trade union representatives to discuss service specific issues,

innovation and new ways of delivering continuous improvement. The advisory groups are an excellent forum for sharing ideas and discussing topical service issues with colleagues from other councils throughout the UK.

Advisory groups are a free service included as part of your authority's membership of APSE and all end with an informal lunch to facilitate networking with peers in other councils.

If you do not currently receive details about APSE advisory group meetings and would like to be added to our list of contacts for your service area please email enquiries@apse.org.uk

Our national advisory groups include:-

- Building cleaning
- Catering
- Cemeteries and crematoria
- Environmental health and trading standards
- Housing, construction and building maintenance
- Local authorities, commercialisation, income and trading network
- Parks, horticultural and ground maintenance
- Renewables and climate change
- Roads, highways and street lighting
- Sports and leisure management
- Vehicle maintenance and transport
- Waste management, refuse collection and street cleansing

Wayne Priestley

APSE, Principal Advisor