

State of the Market Survey 2018

Cemetery and Crematorium Services



March 2018
18-15

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

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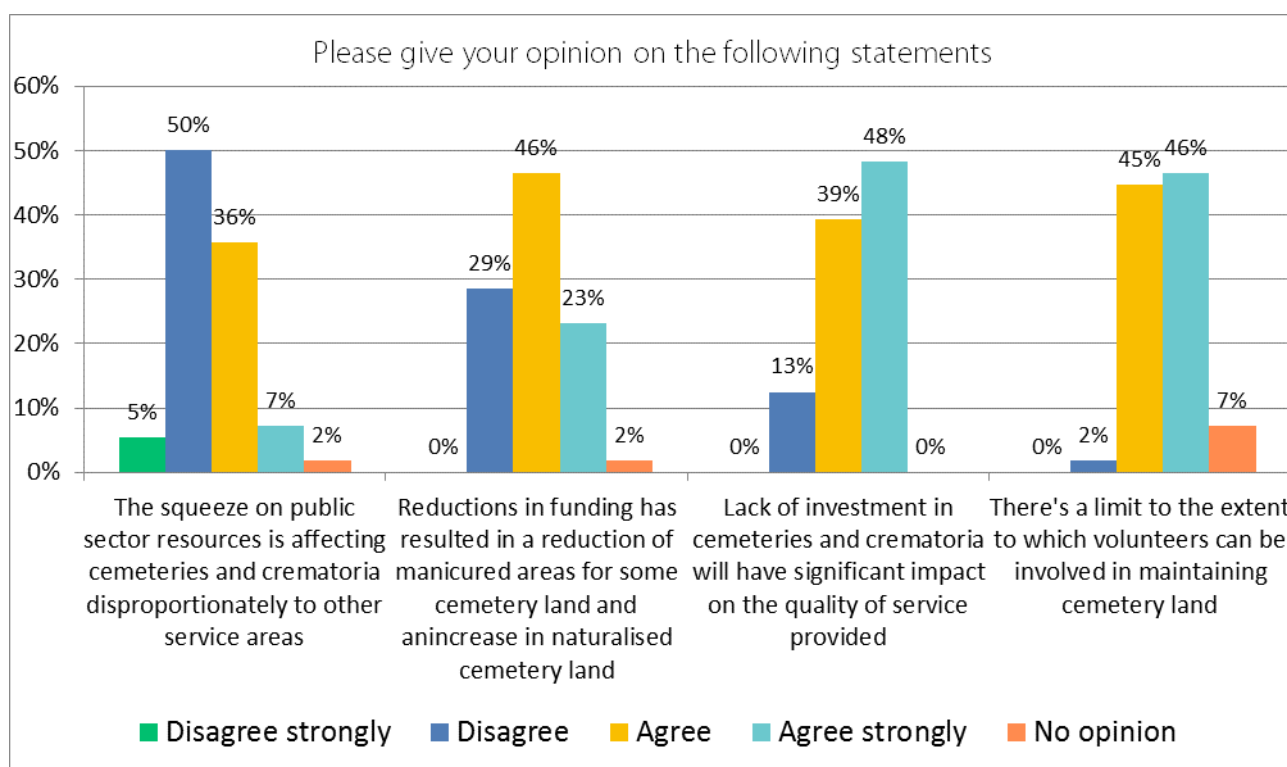
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Local Authority Cemetery and Crematorium Services

State of the Market 2018

APSE conducted an online survey during September and October 2017. The questions contained within the survey have been formulated to allow future trend comparisons to be made on the key issues affecting Cemetery and Crematoria services. The questions have been written in co-operation with local authority bereavement services managers. Almost 60 local authority responses were received from councils throughout the UK. This report identifies the key findings of the survey.

Results from the survey

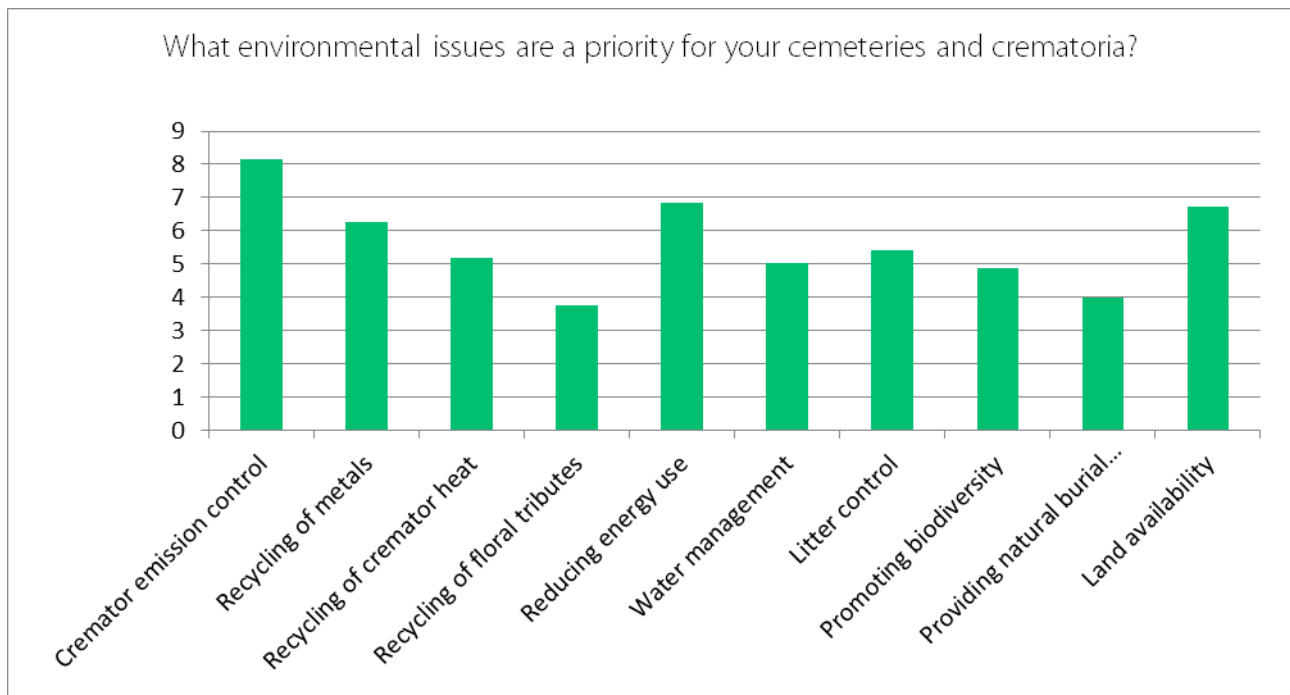


From the opinions received, there does appear to be a general feeling that austerity has not had as big an impact on Bereavement Services as some of the other local authority services. This view is supported by the fact that with regards to bereavement services being affected disproportionately regards budget savings, and a lack of investment impacting on future service quality, over half the respondents felt that neither of these issues had been experienced.

It should be noted however, that over 40% of respondents did feel austerity had resulted in services being disproportionately affected compared to other local authority services and that a lack of investment will impact on future service quality so there appears to be a fine line differentiating these two views.

The only areas where respondents felt there had been little change was in the quality of grounds maintenance, where almost 75% felt standards were still good.

Interestingly with regards to the use of volunteers 91% felt that there was a limit to involving them in grounds maintenance, which is perhaps not surprising as volunteers are often seen as bringing added value to services rather than being seen as being able to carry out core service work, but this may depend on the complexity of roles volunteers are given.



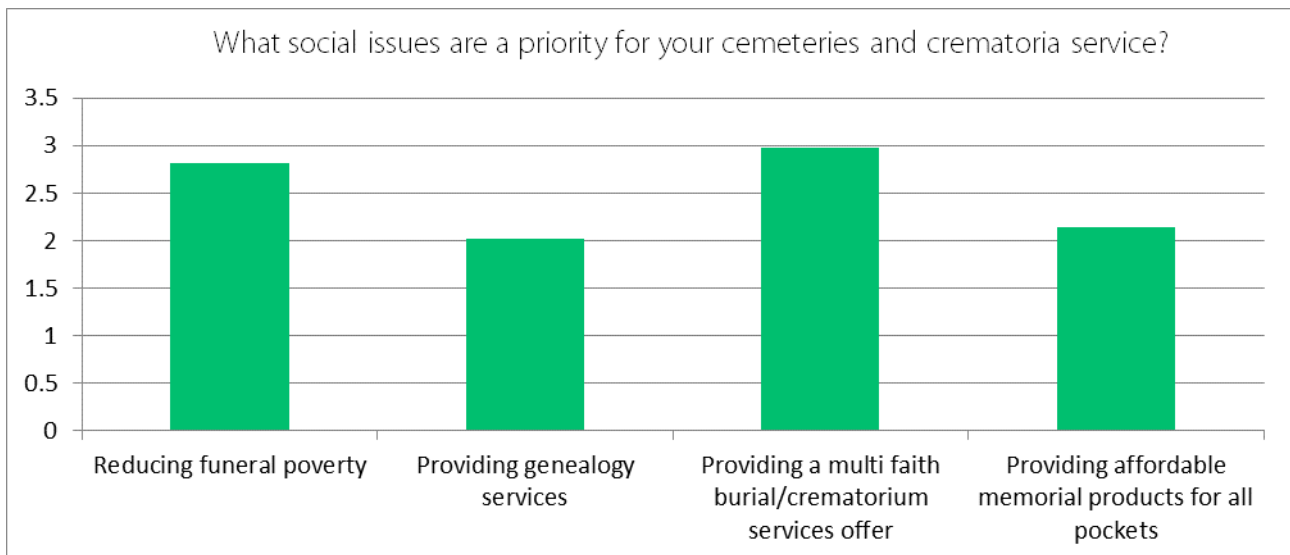
It is perhaps no surprise that key environmental issues are also linked to financial incentives/benefits: emission controls, recycling and reducing energy use. Land availability is still a key issue for many local authorities and one which will no doubt continue to be high on the agenda for many. Land quality is also well represented with litter control and opportunities or promoting biodiversity highlighted. It is clear from these results that cemetery and crematoria managers are building environmental considerations into their service delivery as much as financial and social aspects.

Are there any other environmental issues which are impacting upon your service?

Because of the nature of the service and its strong connection with the physical environment, there are a wide variety of environmental issues which can impact on the service.

Bereavement Managers highlighted the following as areas of concern:

- Tree management – including safety and aesthetic maintenance requirements
- reuse of spoil from graves
- Scottish Environmental Protection Agency guidelines in relation to burial ground, including ground water pollution
- The lack of space for new burial grounds caused by both land availability, increasing population pressures and the competing demands for local housing construction.
- The increased need for cutting grass due to a warmer wetter climate, including winters. This climate change has also been causing issues for re-opening graves in some sections due to waterlogging.
- The use of chemicals and changes to what can be used
- Weed and Moss control

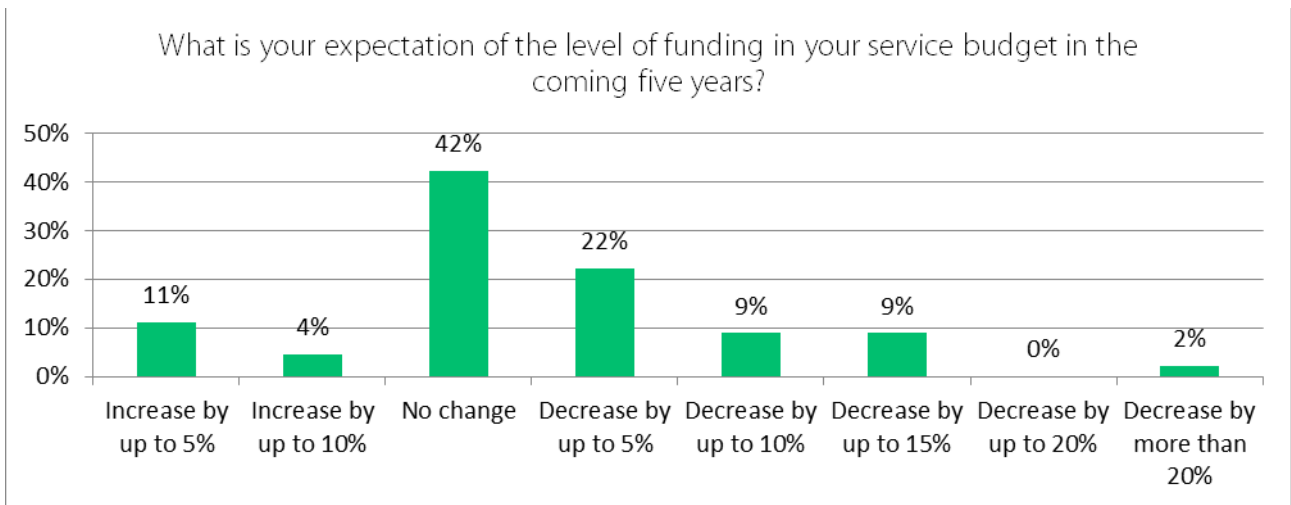
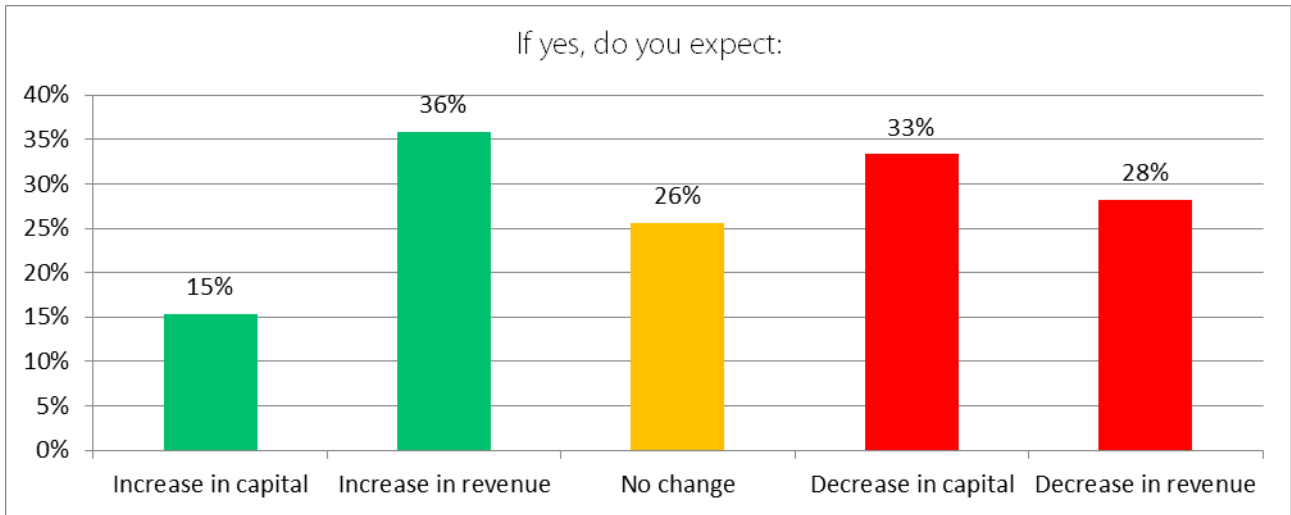
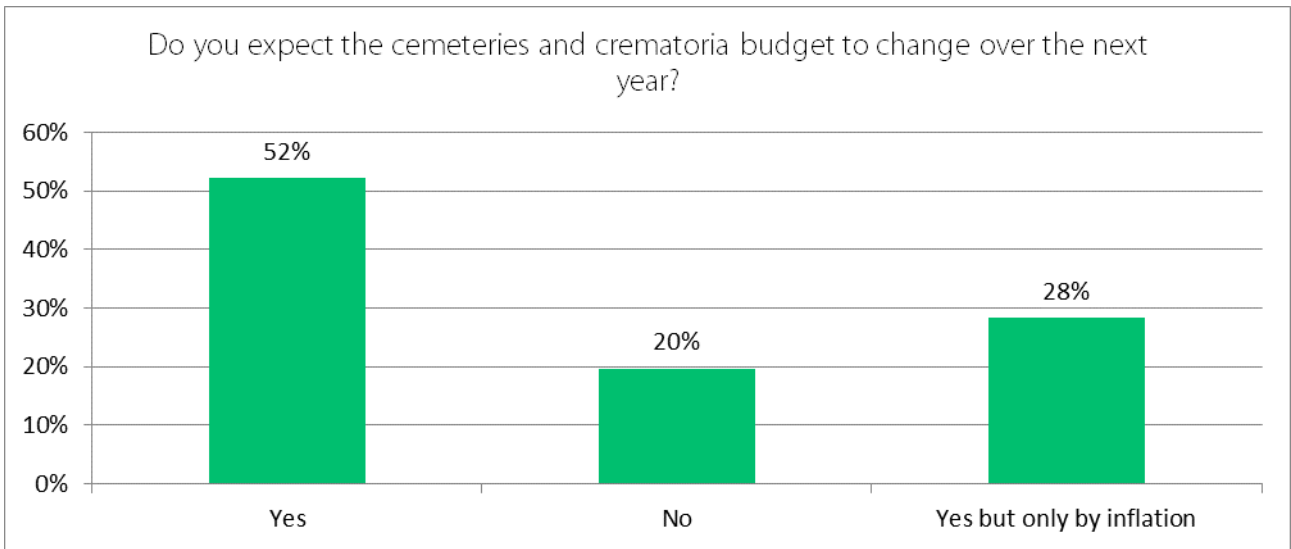


It is apparent that there is a growing need to adapt service provision to enable Bereavement Services to meet the growing demand for multi-faith burials caused by the UK's population becoming more ethnically diverse. There is also a clear commitment to tackle the issue of funeral poverty as shown by its high priority in the responses received. Not surprisingly this may have a financial impact on Bereavement Services from a cost perspective and this is perhaps trying to be addressed through the adoption of greater levels of income generation via the sale of genealogy services and memorialisation products.

Are there any other social issues which are impacting upon your service?

Ensuring residents are dealt with in a sympathetic manner is key to quality service delivery, and as such Bereavement Managers have to consider ways in which to help vulnerable families at their time of loss. Some of the responses received highlighted the following:

- The need to ensure the availability of local cemeteries to remove the need to travel outside the area to visit departed family members.
- The need to provide free child funerals.
- Providing more celebratory services with more personal content.
- Coping with the responsibility for providing the increasing number of Public Health Services
- Working with NHS colleagues to deliver best quality service for foetal and babies funerals
- Dealing with changing demographics and in particular low income sections of the community
- Dealing with the demands on Bereavement Services to provide revenue earnings for local authorities, which is not always reinvested in the service. There was a view that if it was, fee increases when necessary would be considerably lower resulting in the financial strain on bereaved families being eased.



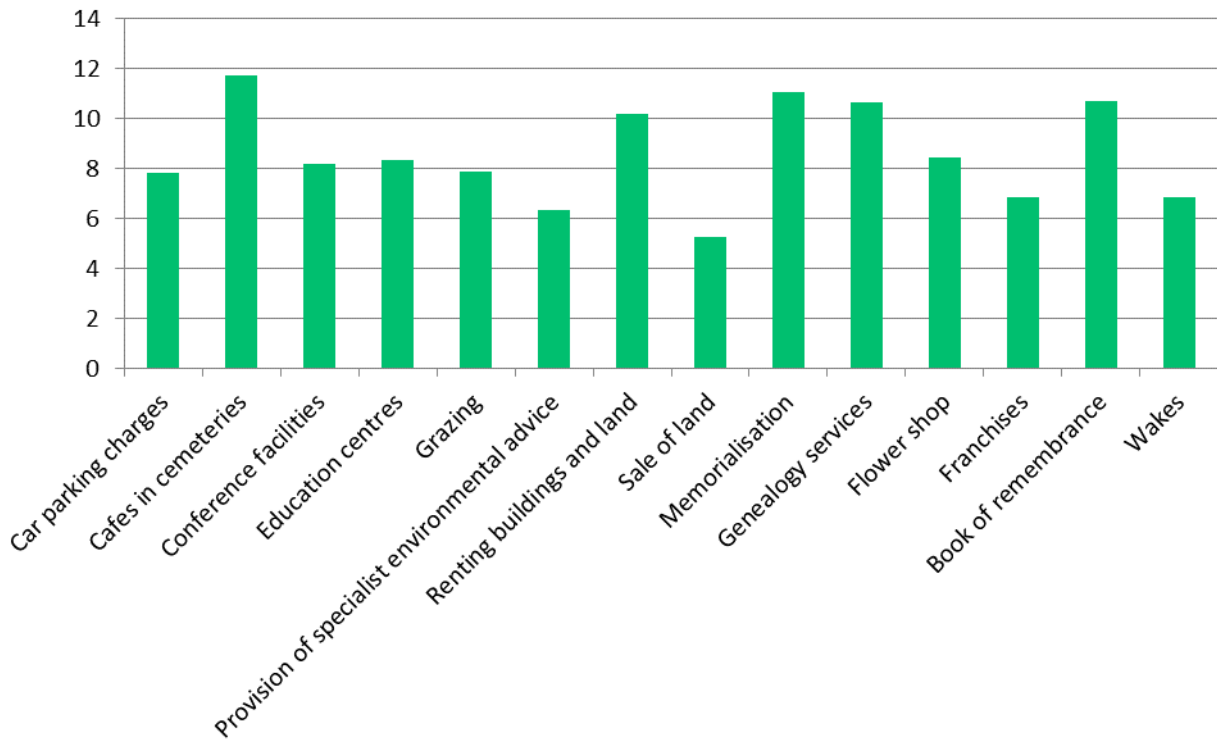
From the above three graphs it is clear that changes are expected in budgets over the next 5 years, however there does not appear to be any great threats to the long term viability of service provision with most respondents expecting increases or no change to current levels of funding.

How do you expect to achieve any efficiencies required (eg Increase income level / introducing new services offers)

Clearly this is an area where there is a great deal of focus. With budgets across most local authority services being reduced the need to income generate to plug these funding gaps is paramount. From the responses received it is evident there is no shortage of ideas being considered and implemented which are helping address these problems.

- Increase existing fees & charges
- Charging differential rates e.g. for non-residents
- additional fee for pre-purchase
- Charge for products previously free
- Introducing new and increased memorial offer and memorial mason services
- Re-engineering of management of burial and grounds maintenance
- Re-viewing and altering staffing levels
- Replacing existing cremators in order to improve efficiencies and bring in an additional income through higher productivity levels.
- Utilising unused cemetery land to develop burial vaults, sarcophagi and mausoleum plots. This has led to increased revenue, burial provision and choice for local families.
- Creation of new woodland burial service and reviewing fees and charges by benchmarking the market.
- Service review, rationalisation, growth and diversification.
- Letting-out vacant cemetery buildings
- Full cost recovery dependent upon political agreement.
- Setting up of a municipal funeral service
- Reducing ground maintenance
- Utilisation/consultation with locals friends groups
- Better utilisation of current facilities, including expanding into the undertaker/funeral Director side.
- Introduction of pet cemetery
- Attempt to increase income levels through the provision of new services such as Municipal Funeral Service.
- Introduction of a memorial service, headstones etc. and created a number of new memorials/graves combined.
- Introducing new service with additional fees (e.g. Saturday service provision).
- Introduction of digital solutions to manage workflow, the staff resource can then be utilised to provide the new services and ancillary items.
- Use of heat exchange to reduce heating/energy bills.
- Parks Services are taking the biggest hit to reduce pressure on the cemeteries section.
- Using the ceremony rooms for other things other than funerals (outside funeral service times).
- Seven day working

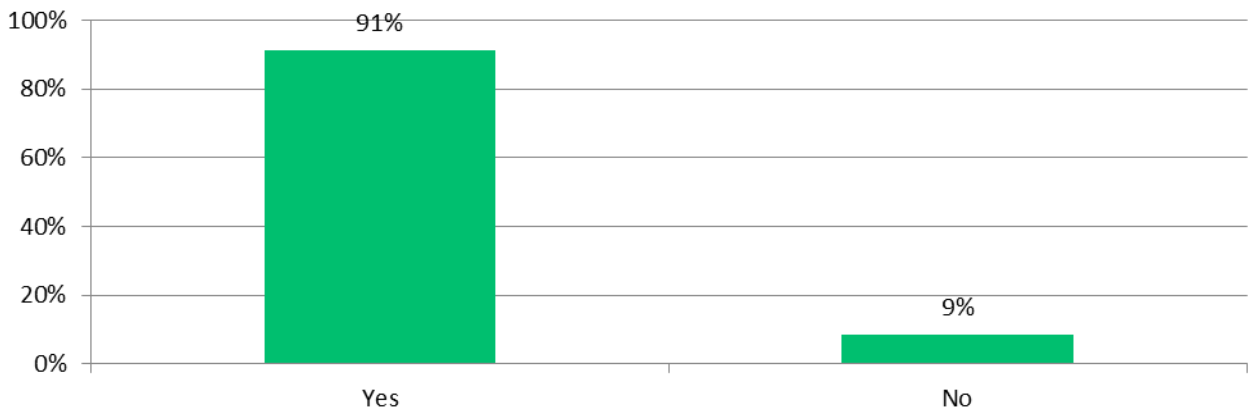
Apart from burial and crematorium charges, what other areas do you currently generate income in through fees and charges (either provided in-house or through a franchise)?



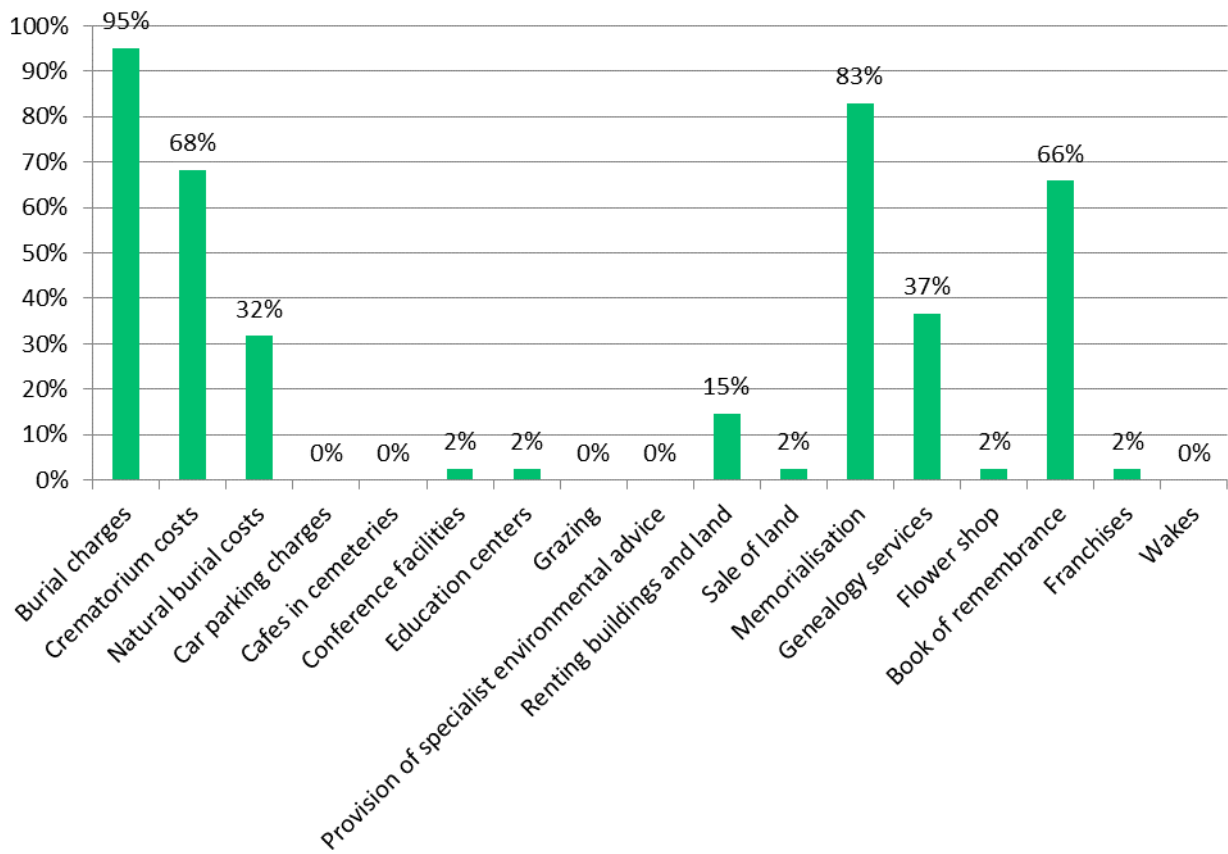
Do you have any other sources of income which are not included above?

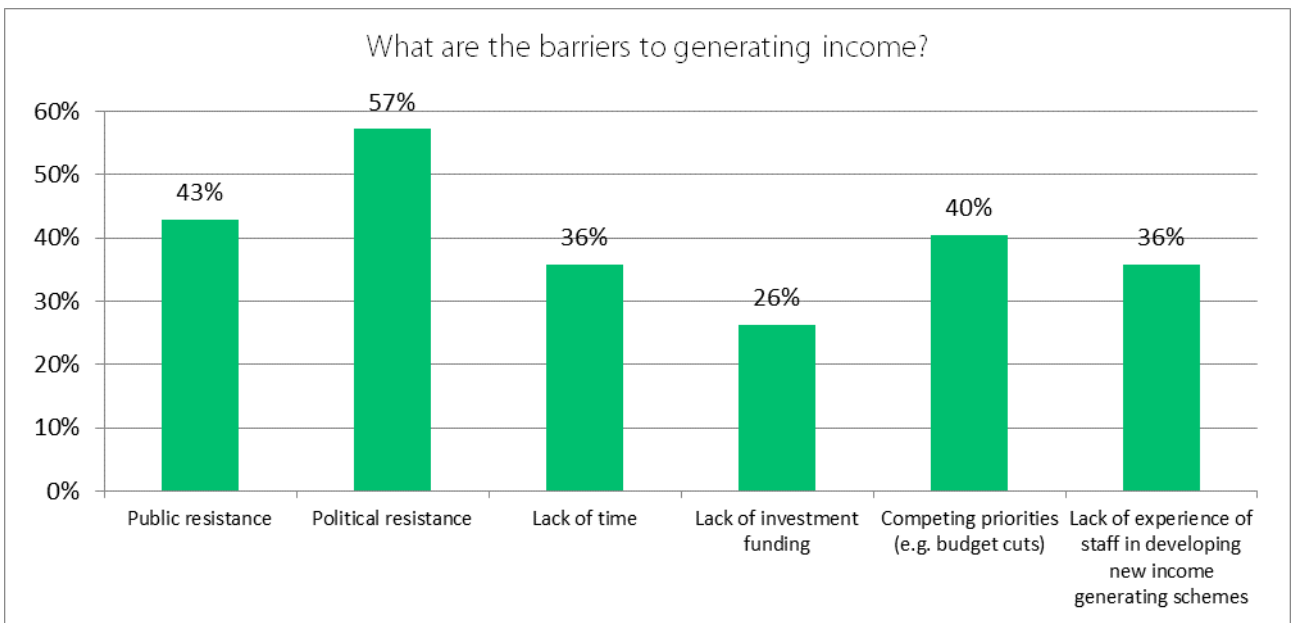
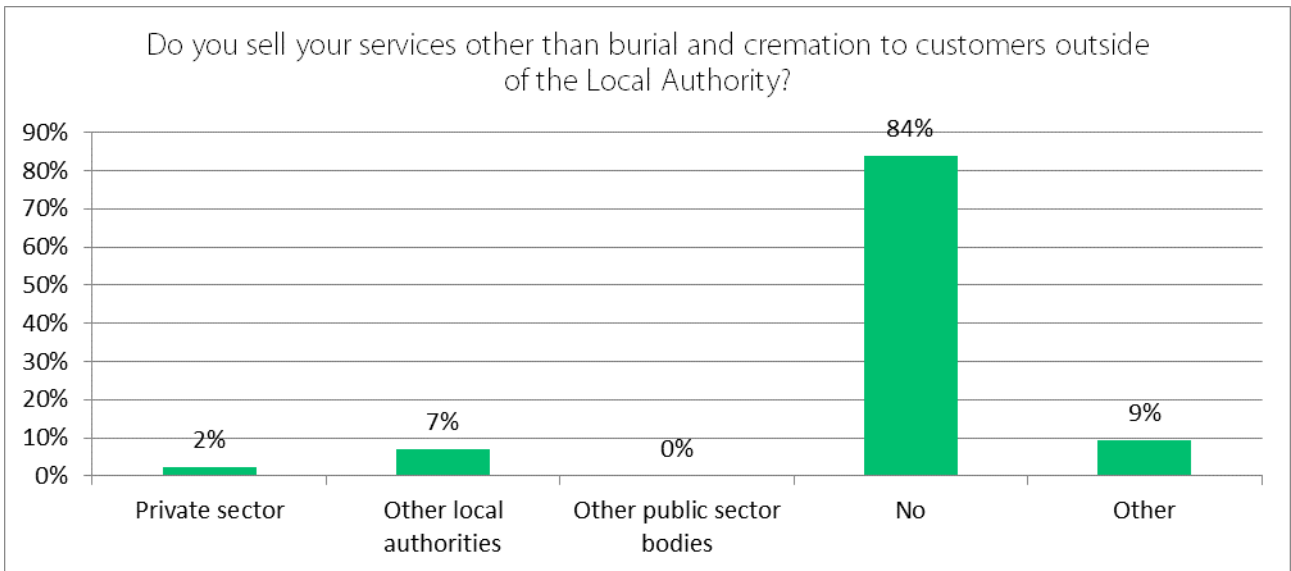
- We make income from memorialization and genealogy and providing burial service to local parish council cemeteries
- Sports Pitches
- CAMEO mercury trading payments
- Provision of officer time in assisting other authorities to process Public Health funerals.
- Profit share with music partner.
- Pre-paid cremation service for future use by families.

Are you intending to increase fees and charges over the next 2-3 years to meet efficiency pressures?



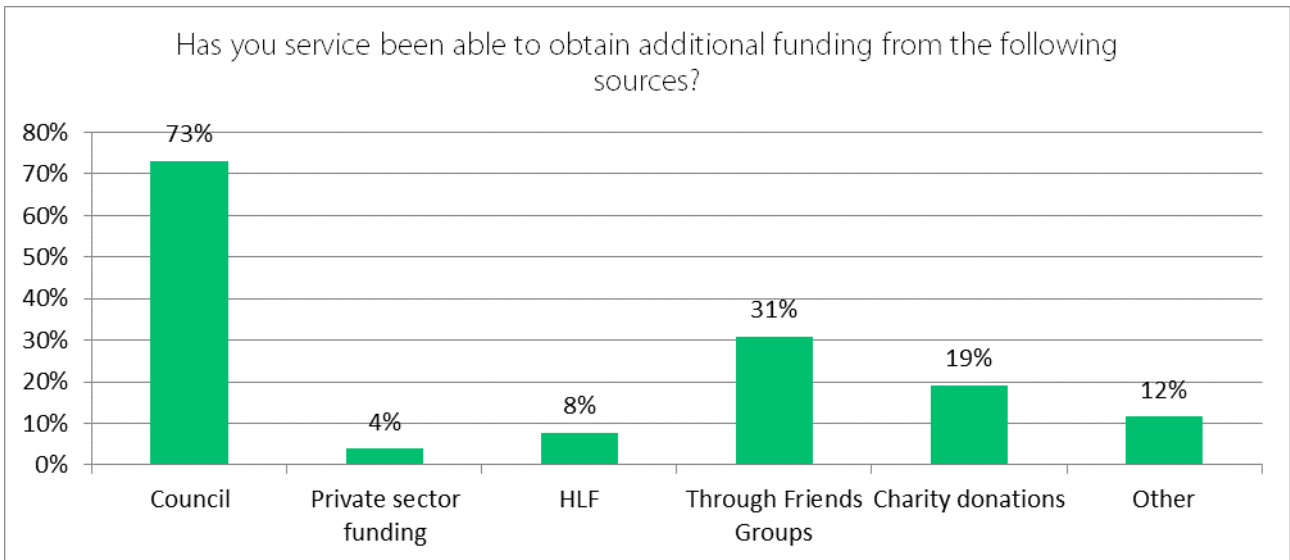
If yes, what areas do you intend to increase fees and charges in over the next 2-3 years?



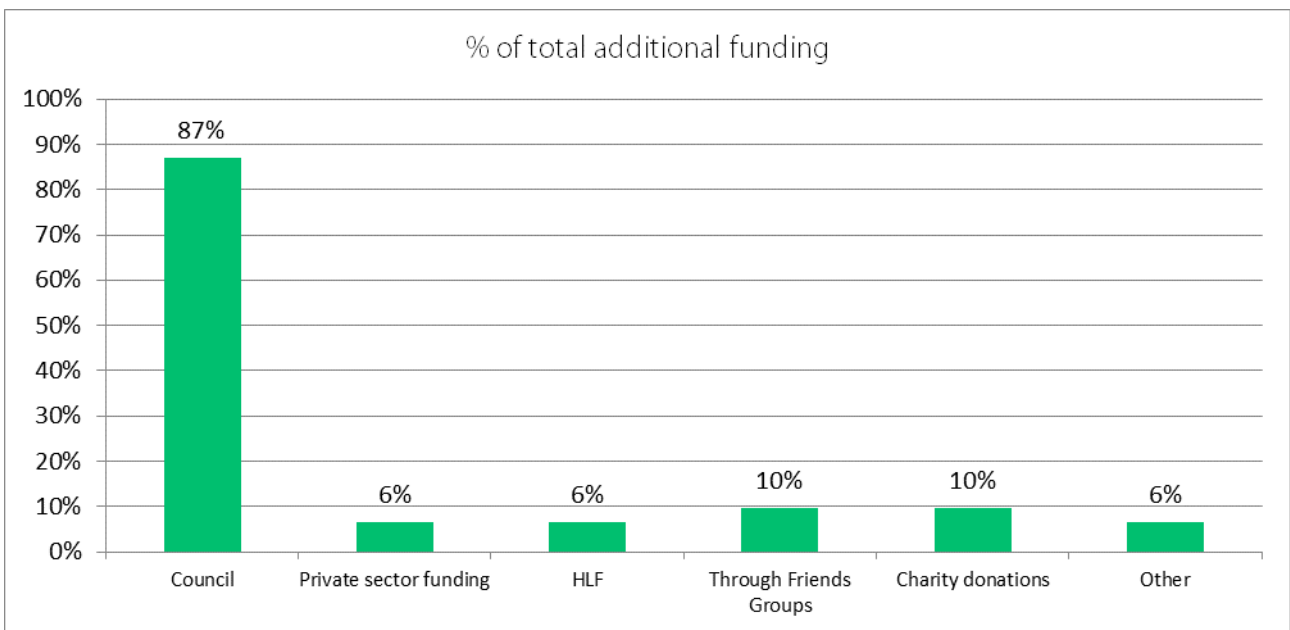


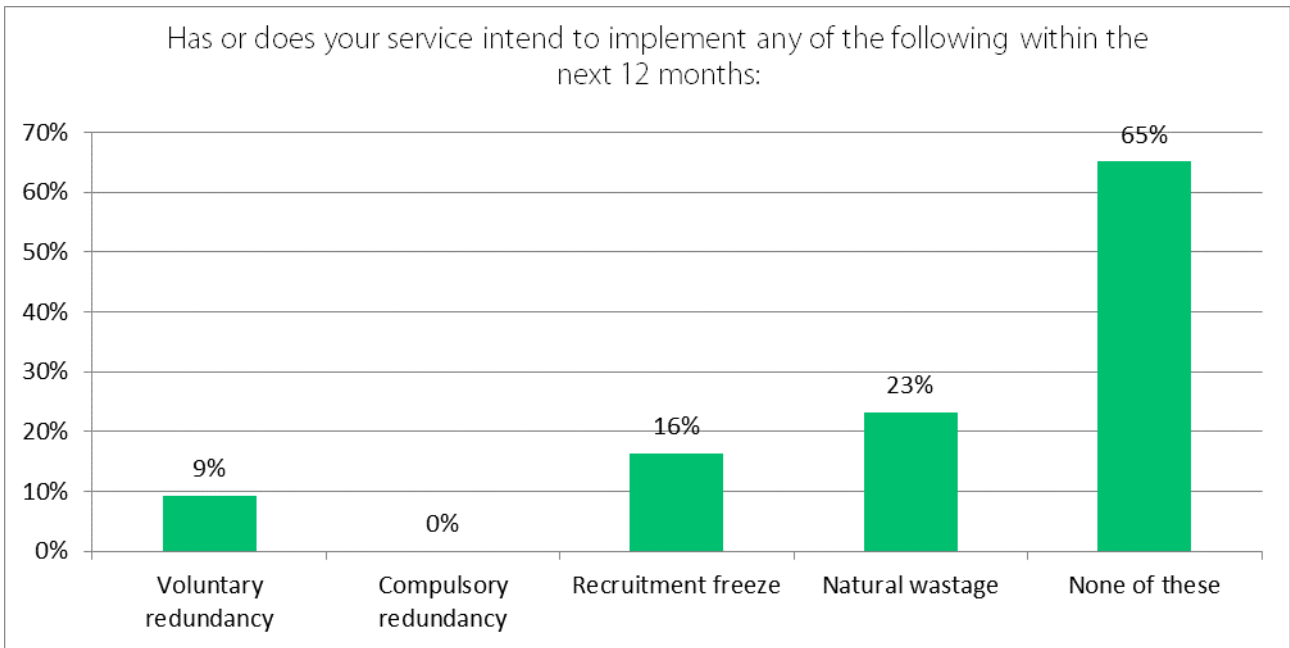
It is clear that because of the nature of the service and the fact many families are extremely vulnerable at the time of loss, it is still seen by many as unseemly to be generating income from the provision of additional services. Equally it does appear there may be a clear need to train staff to look more closely at the services they provide, or regarding the development of new services to help generate additional income.

There may be some reluctance to consider increasing income, particularly as has been highlighted earlier if this income is not re-invested in the service.

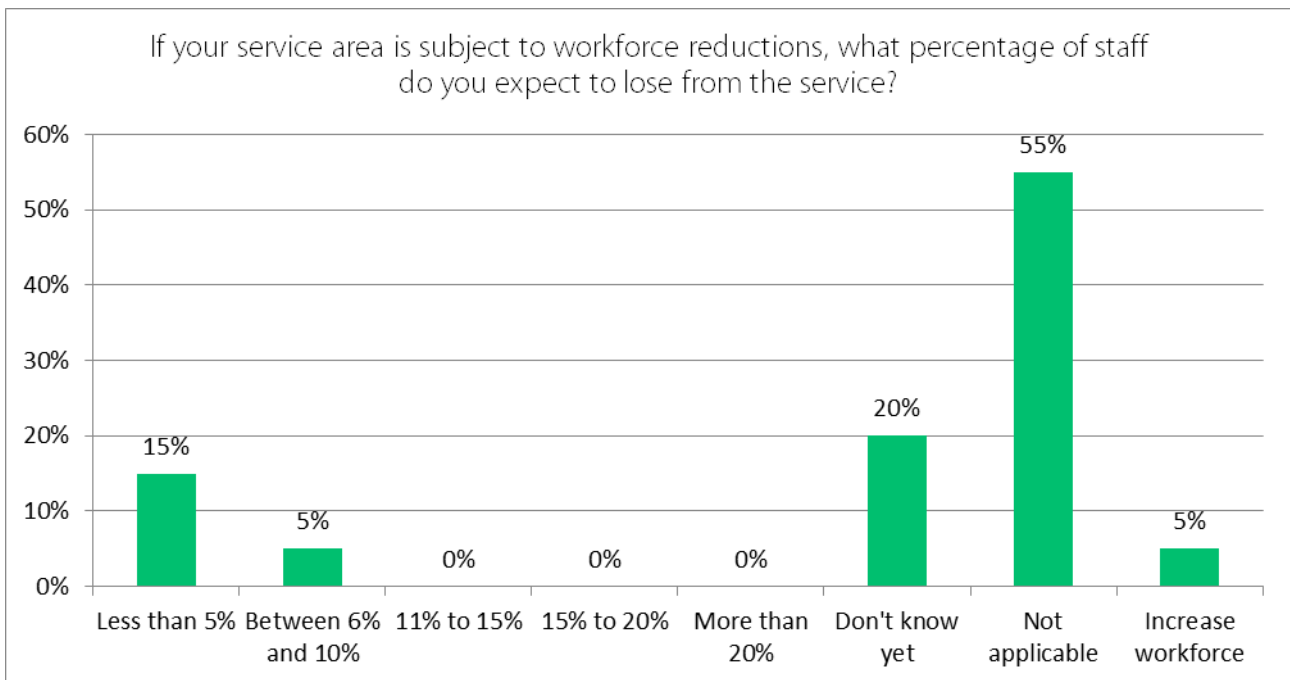


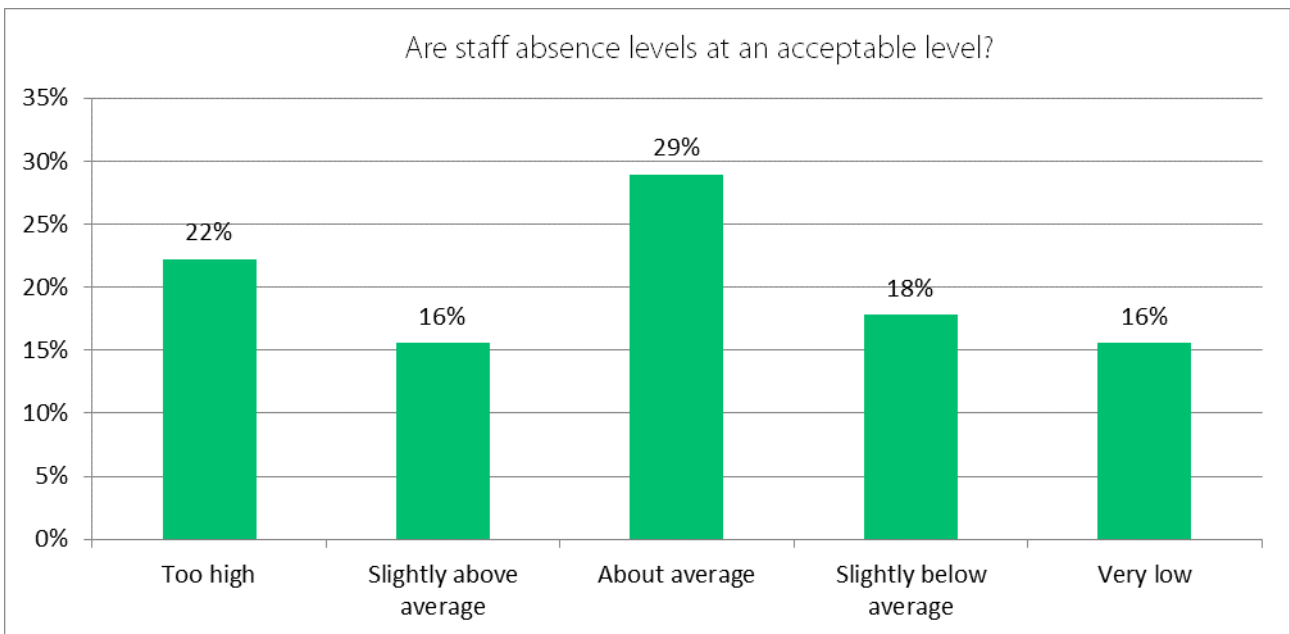
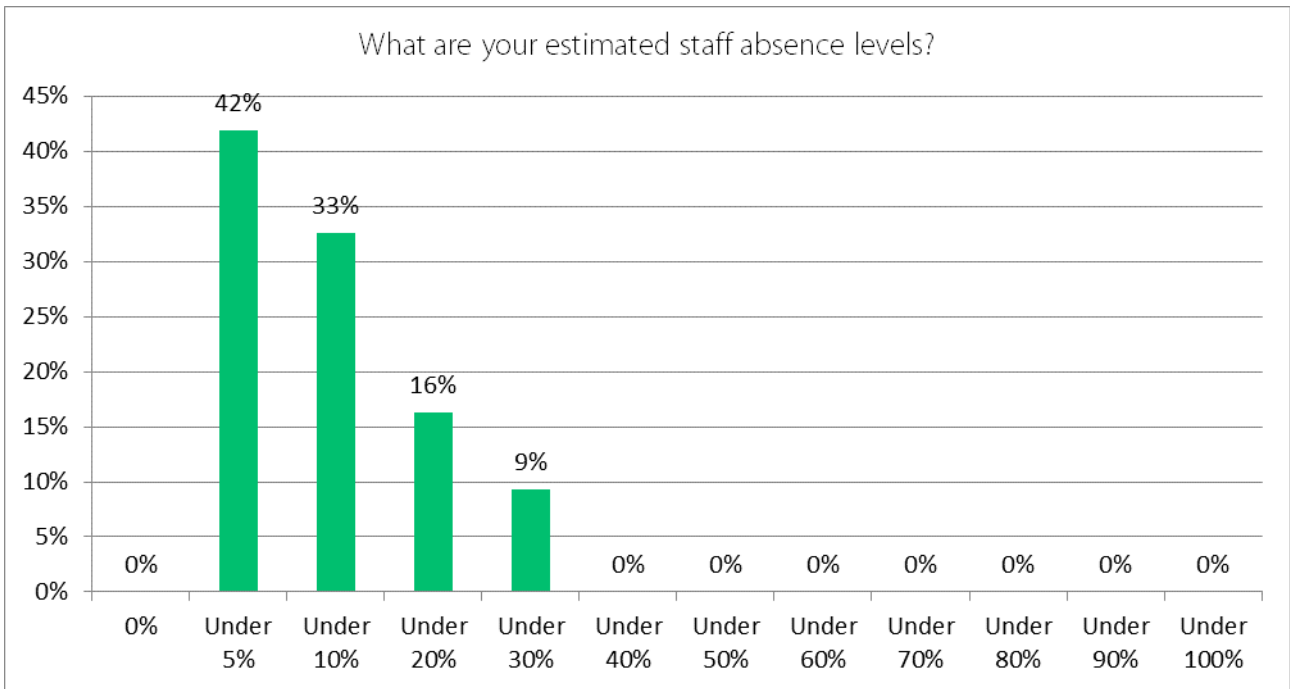
Although council funding is still the main source of additional funding it is notable that Friends Groups are making significant contributions towards the maintenance and improvement of cemeteries and crematoria.



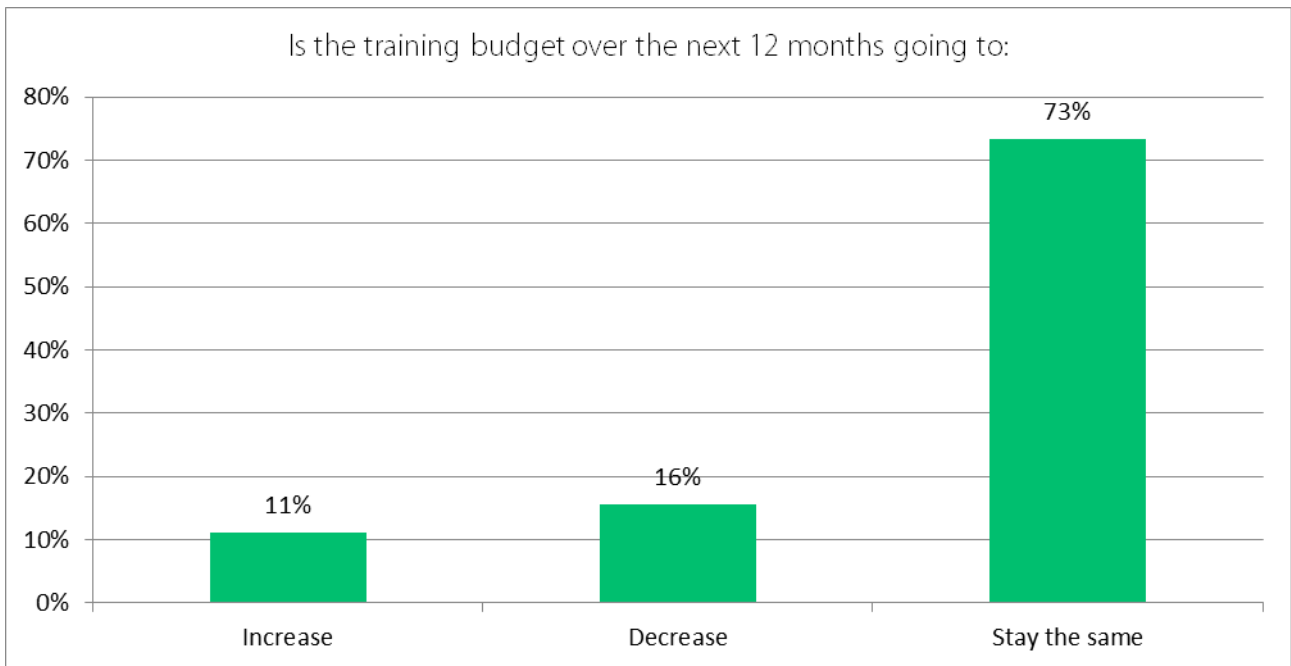


It is perhaps heartening to note compulsory redundancy is a path none of the respondents are looking to go down, with regards to staffing levels over the next 12 months. In fact very few are looking to lose staff other than through natural wastage. Almost 65% of those responding, do not expect to see any staff losses.

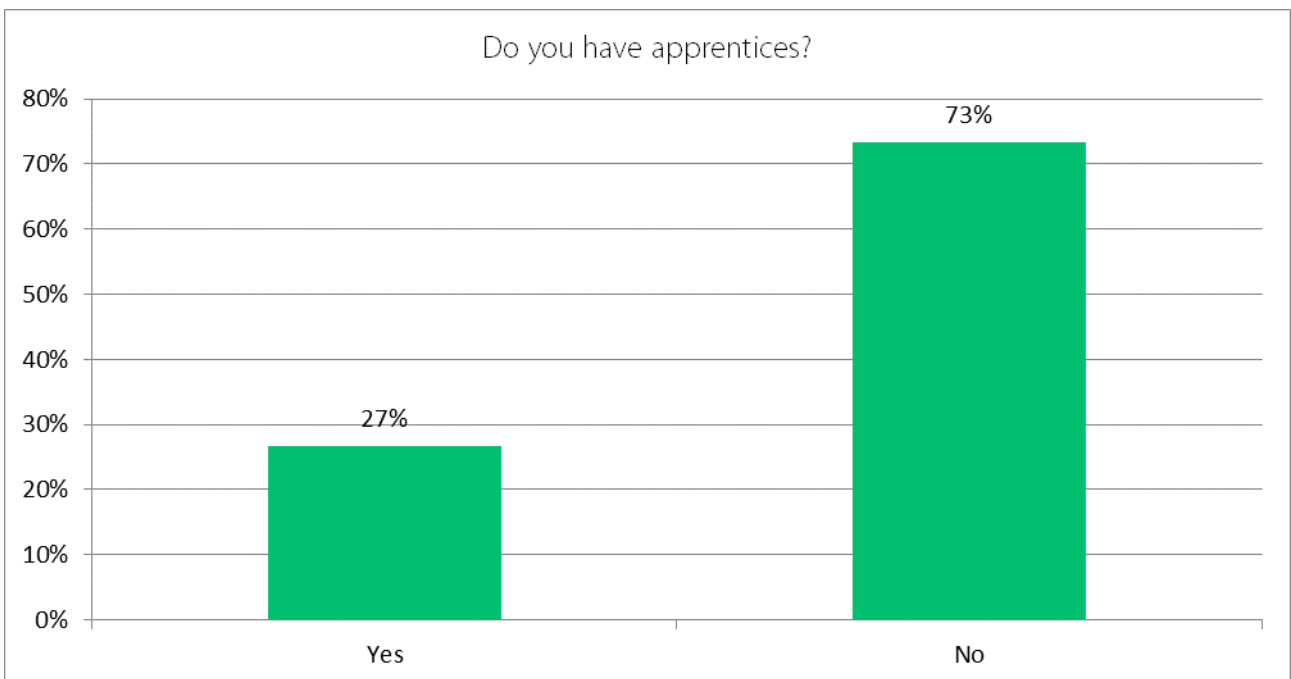




Regarding staff absence levels, it does appear that there is a concern about sickness levels, although this should be considered against the fact there is no distinction between front line and back office staff or long-term and short-term sickness levels. This element may need to be more clearly defined in future surveys.



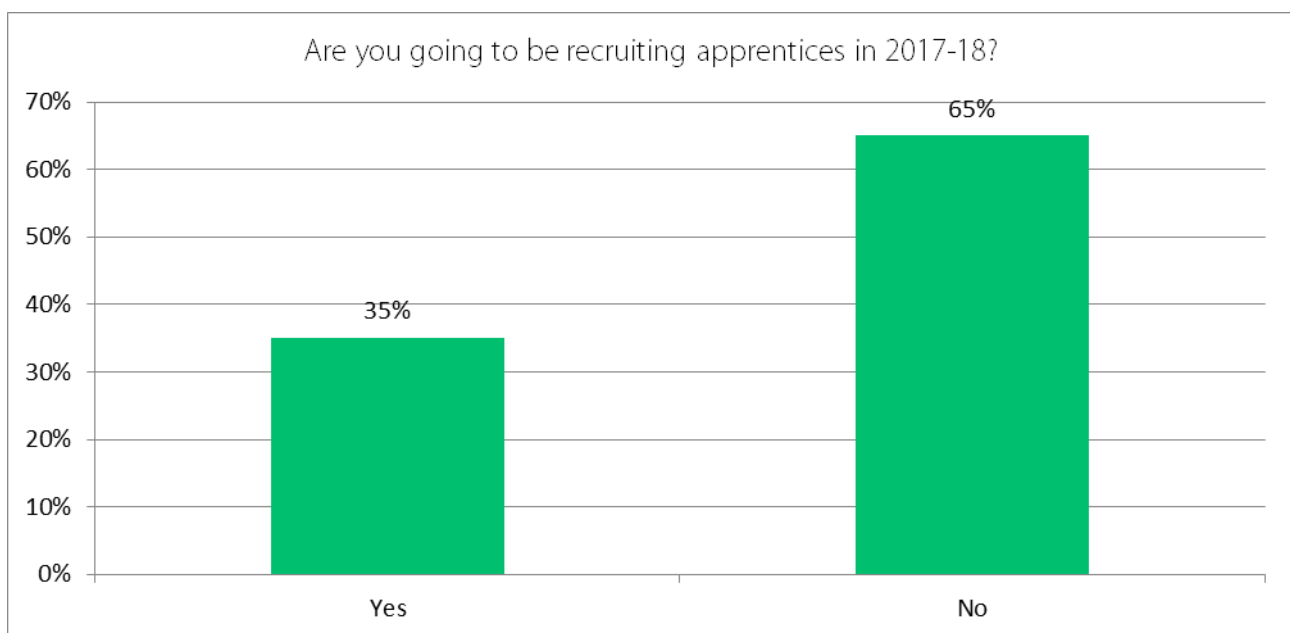
The relative lack of budget reductions in training levels, may suggest that because of service reviews, multi-skilling of staff and new job requirements such as developing new sources of income, then the need to up-skill staff has been recognised and funding provided accordingly.



Are you retaining all apprentices from the last recruitment round? If not, why?

Those who are employing apprentices all seem keen to retain staff wherever possible. The following responses were received:

- Our intention is to do so if there is a vacancy to fill. We will keep apprentices employed temporarily for as long as we are able.
- Unfortunately due to poor performance we will not be retaining the current year of apprentices.
- All apprentices from the 2013 intake (it is a two year apprenticeship) were employed by the service (however, not just in cemeteries). Of the 2016 intake it is highly likely that they will all find employment with us.

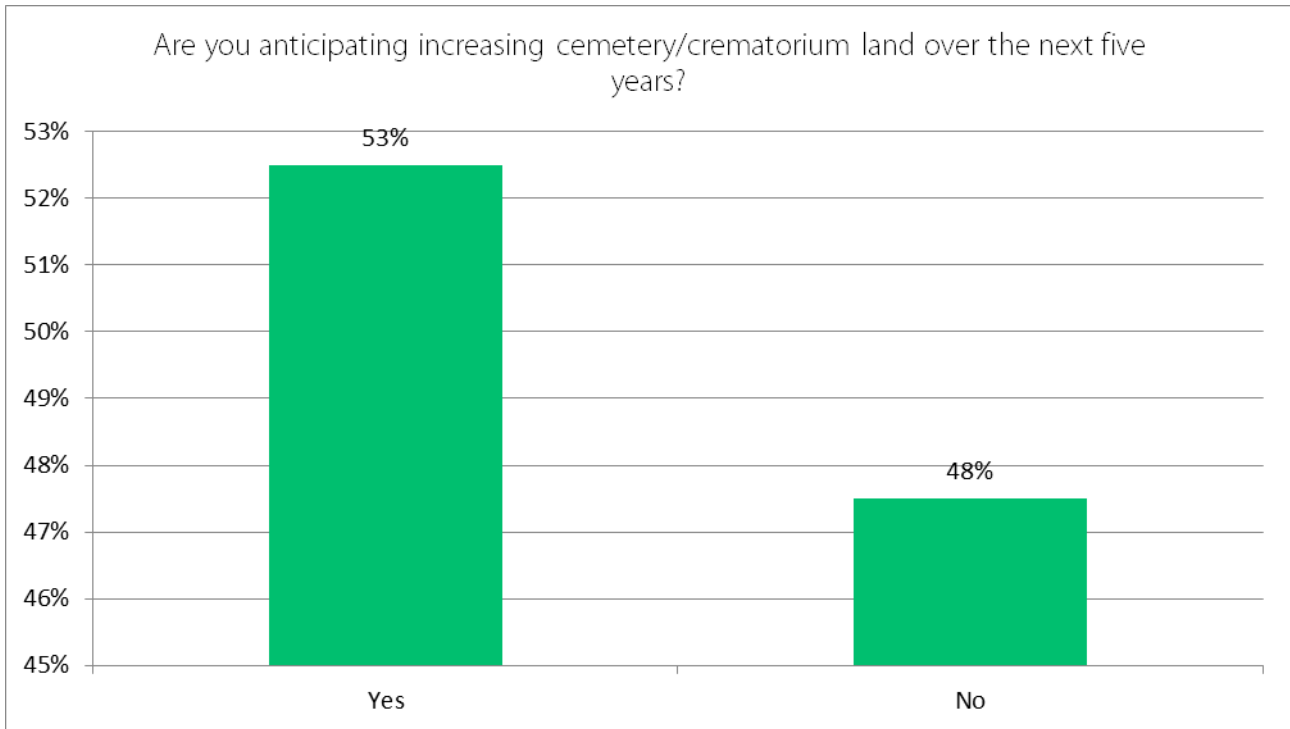


It is noticeable compared with the results for 2017 regarding those authorities responding that they did employ apprentices, there has been an increase in those responding that they will employ apprentices in 2017-2018.

How many cemeteries does your authority manage?

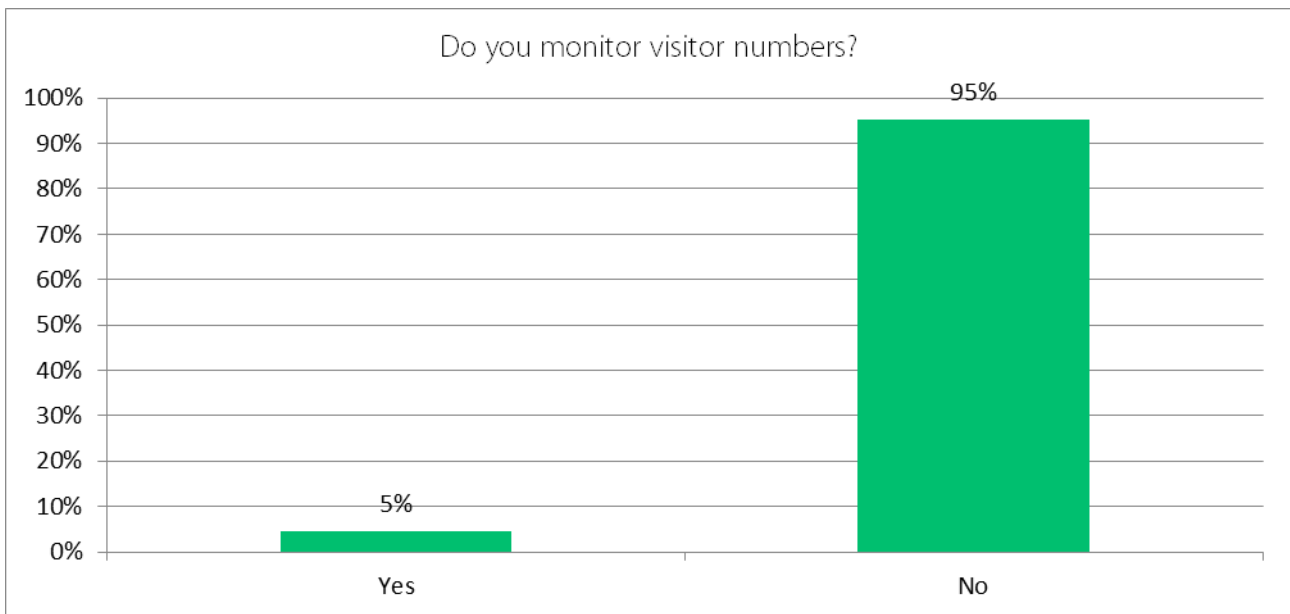
The following results were received:

Most local authorities who replied managed between one and ten cemeteries (77%). 15% managed eleven to twenty cemeteries, whilst 8% managed over 40 cemeteries.

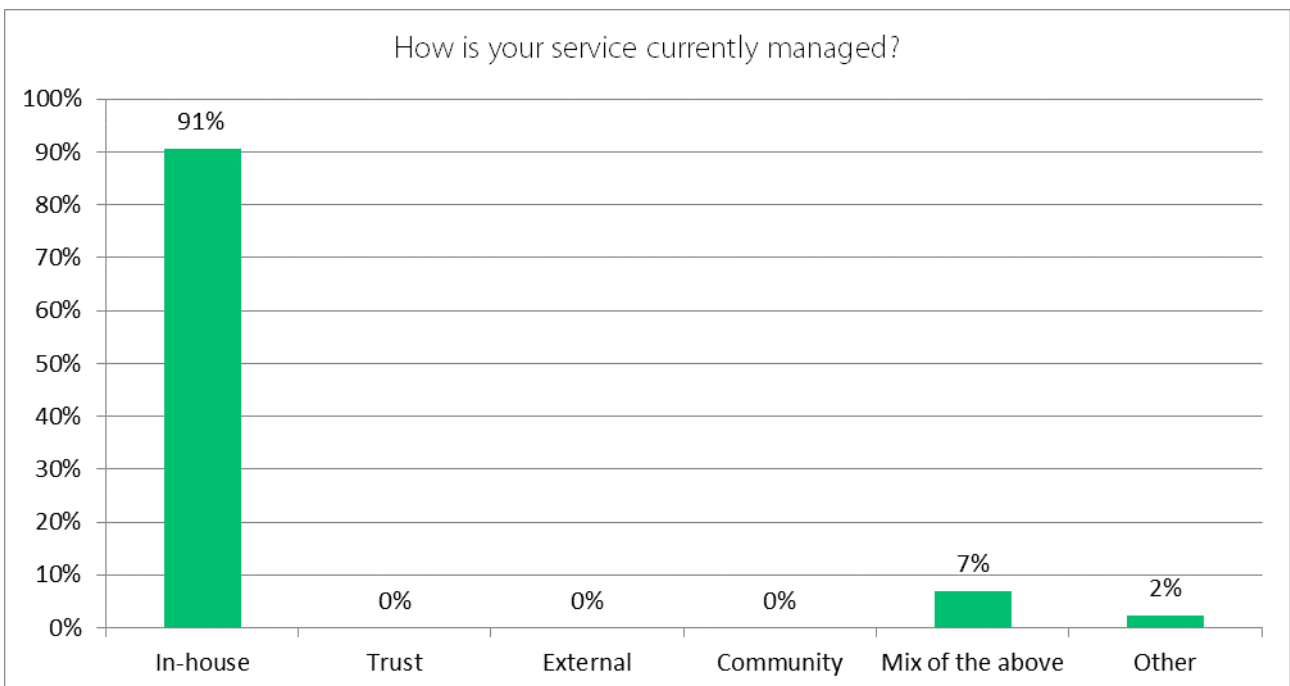


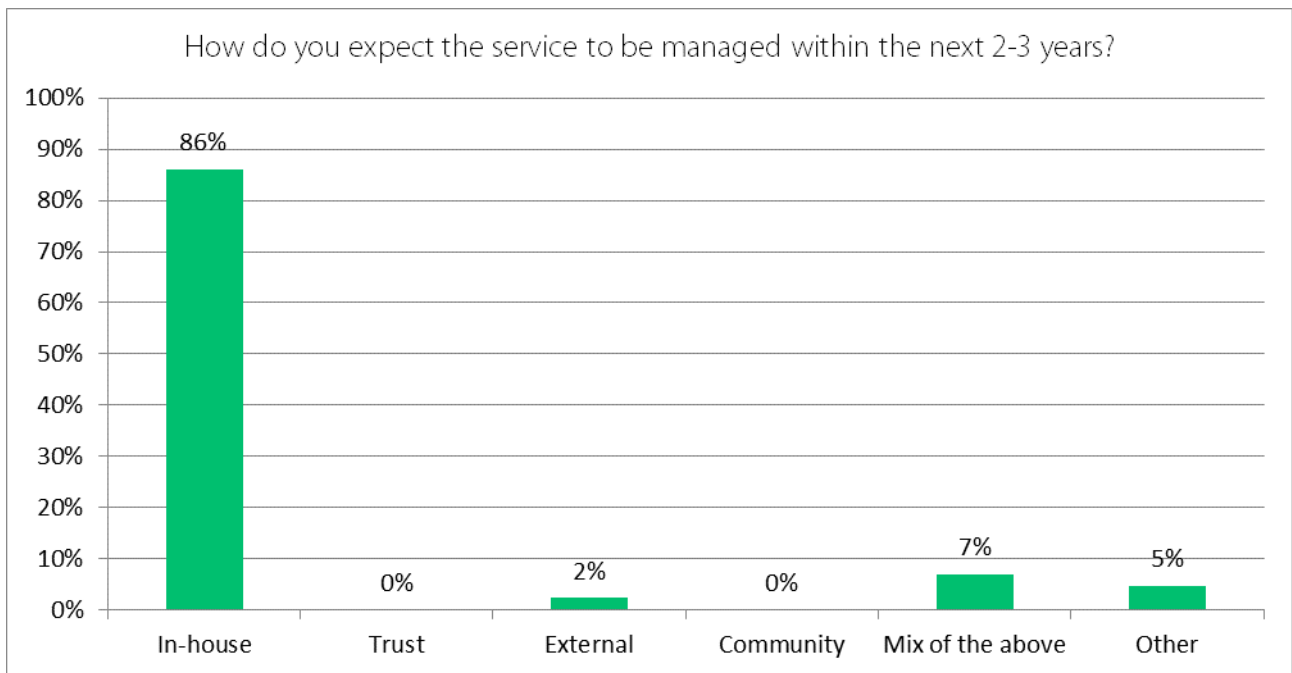
If yes, how many?

Hectares	Equivalent burial numbers
4	4,000
0.25	1,100
20	60,000
6	10,000
10	7,600 approx.
30	50,000
1.5	2,250
54	50 years' worth
3	7,000

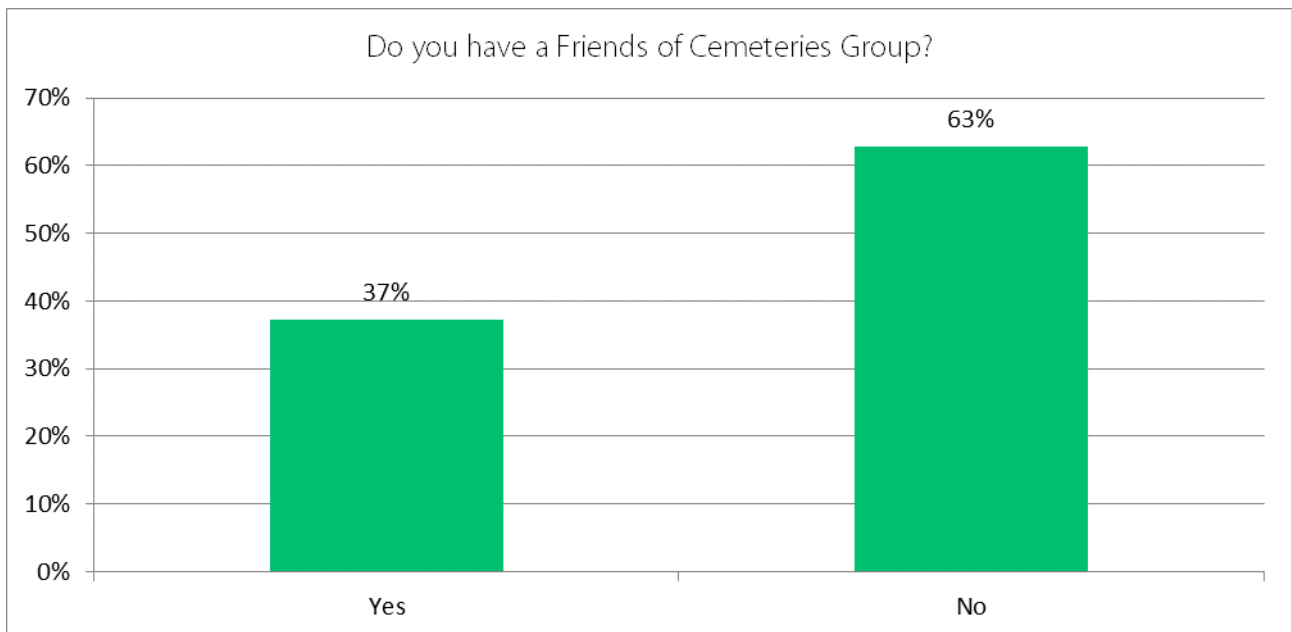


Interestingly very few services appear to measure the number of people who visit their cemeteries. This statistical data would be very useful information when justifying the importance of the service, in particular, budget setting to ensure high standards of physical features and grounds maintenance levels can be maintained. This type of information would also be useful if considering the provision of on-site cafes or florists by allowing a footfall estimate to be established.





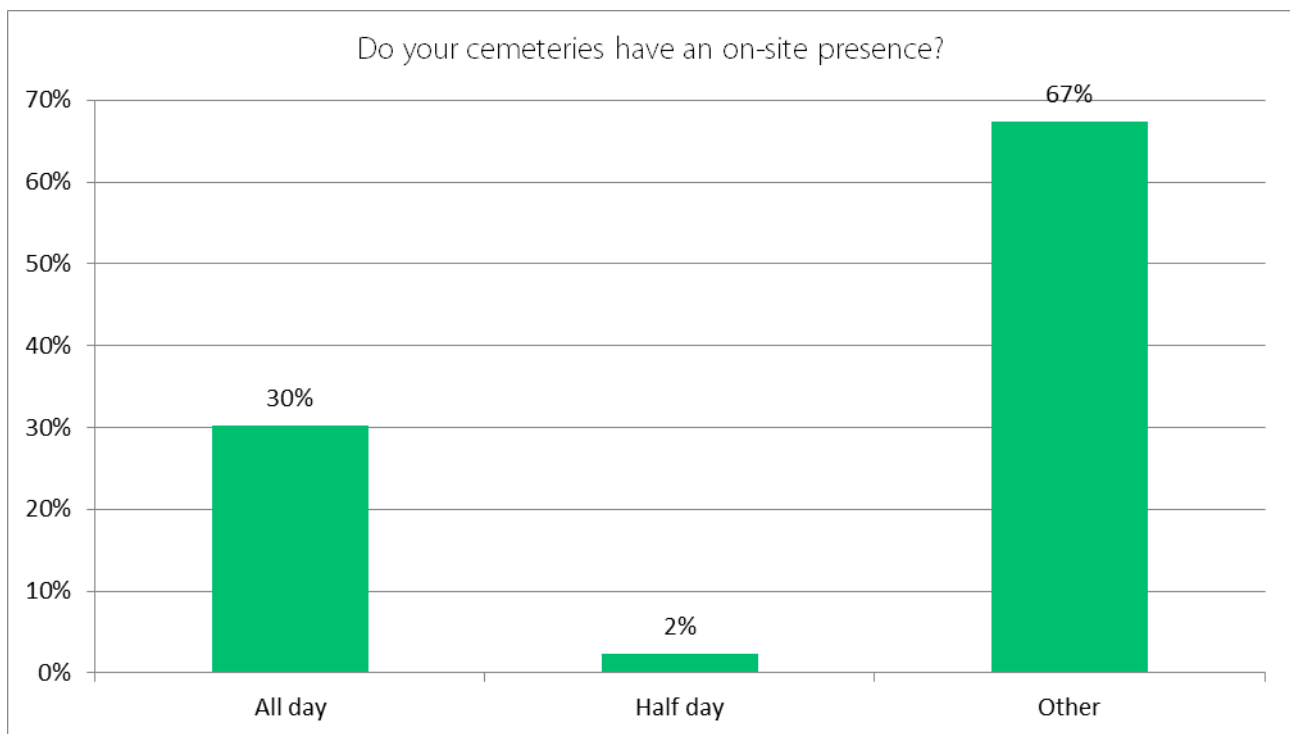
From the above two graphs the future provision of Bereavement Services does appear to be remaining firmly in control of local authorities.

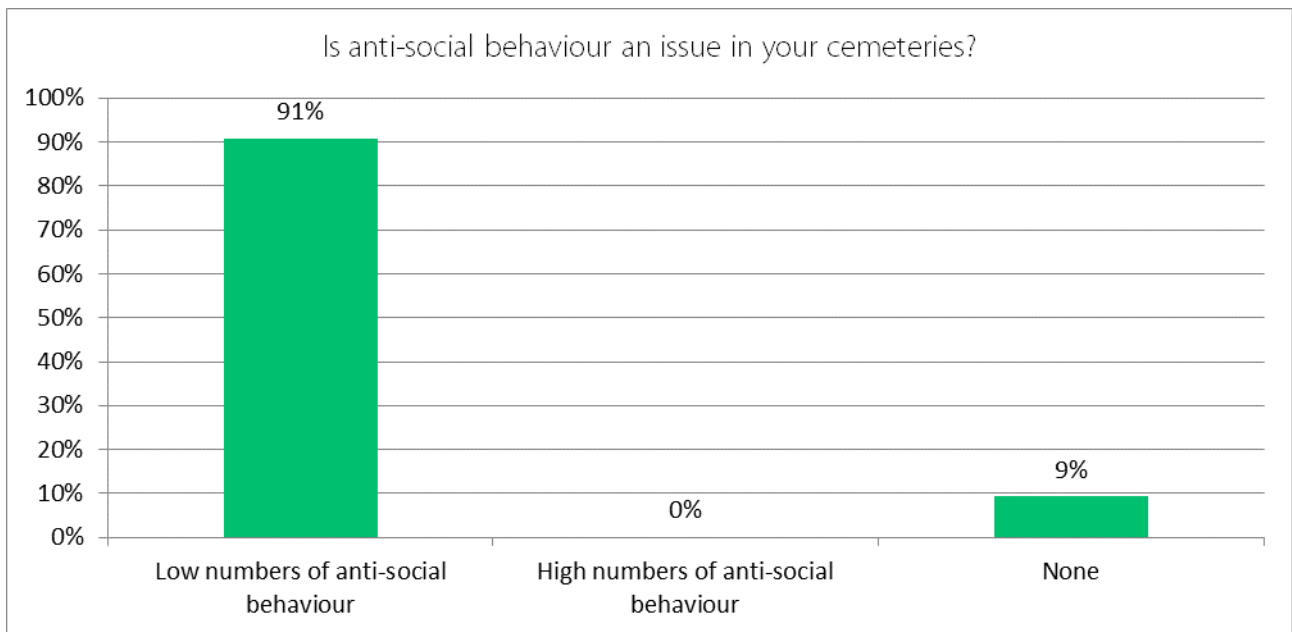


Over a third of local authorities which responded appear to have a Friends Group which supports their Bereavement Services. Whether this support be strategic, operational or financial, the role of such groups seems to be coming common place across a number of local authority services.

If yes, please give a brief description of their roles and activities

- Grass cutting, painting, general grounds maintenance.
- Fund raising for memorials to be reinstated - working groups clearing leaves and doing general gardening works.
- Seeking funding opportunities and policing cemeteries to manage social behaviour & control of pets.
- Roles highlighted include; staffing a visitor centre, providing guided walks/talks, arranging remembrance services, educational visits, recording all memorial inscriptions, fundraising, horticultural and environmental maintenance tasks, helping visitors find graves.
- Accessing funding and assisting with promoting the facility as a visitor resource.
- Genealogy advice

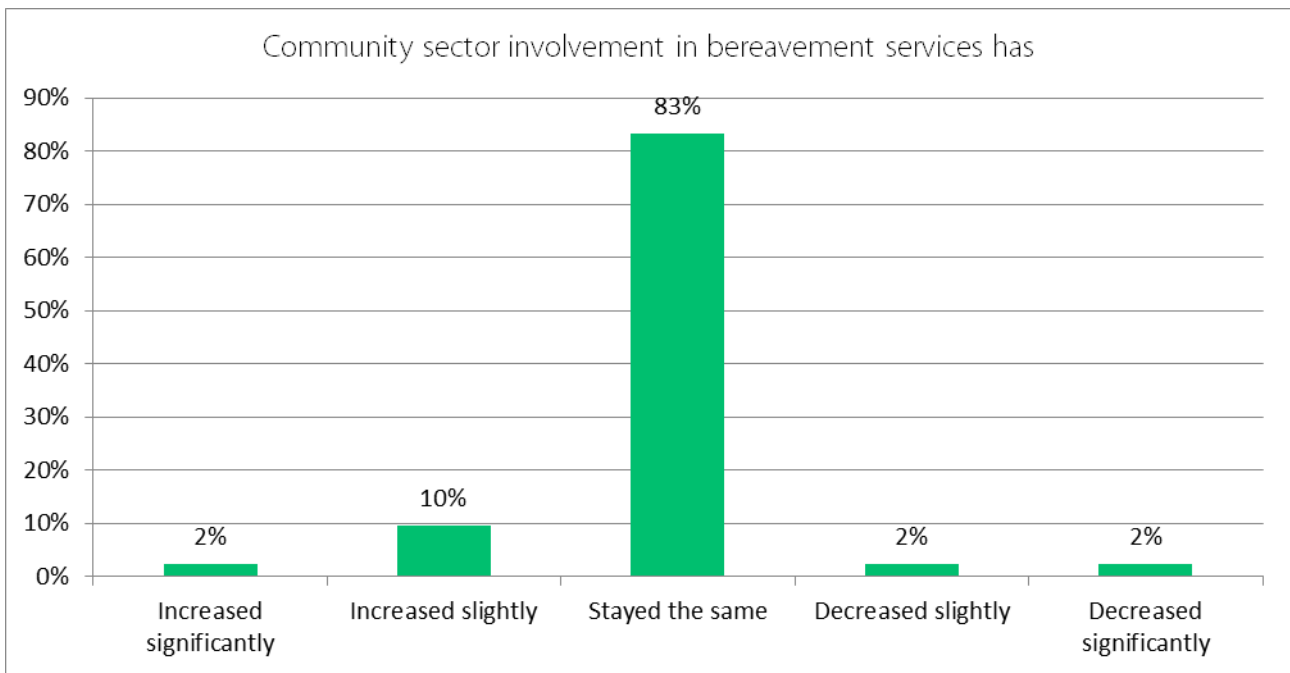




If yes, please give a brief description of any incidents

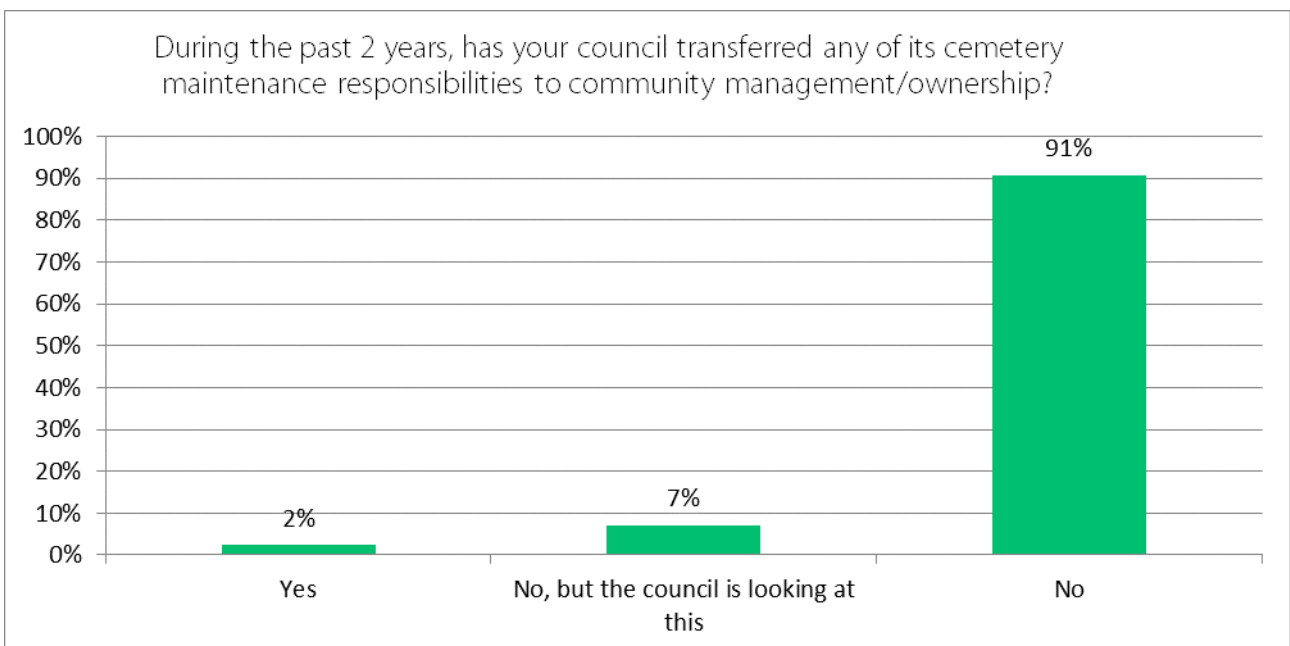
Although it appears incidents of anti-social behaviour in cemeteries are relatively low, what incidents do occur seem to be common across all respondents, including:

- Drinking alcohol and leaving bottles / cans etc.
- Interference with memorials, drinking, pushing headstones over, unauthorised felling/damage to trees, fly-tipping
- Removal of items from graves
- Vandalism, littering, drug taking, drinking
- Dog fouling / Dogs off leads at all sites
- Dog walkers, youths causing a nuisance
- Anti-Social Behaviour particularly related to Toilet areas
- Break-ins
- Thefts from cars
- Rough sleeping
- Un-authorised access



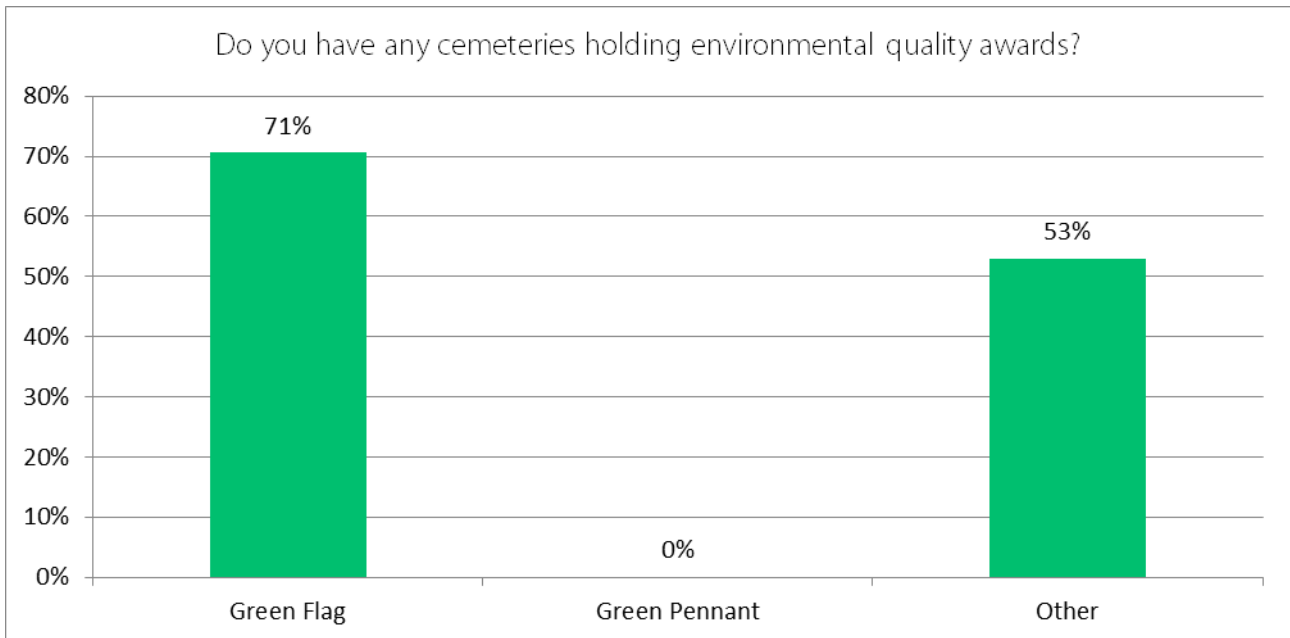
If yes, in what areas is this increasing?

- grass cutting, clearance of fly-tipping, and dog fouling
- Cemetery maintenance
- Vigilance
- Joining Friends group meeting and participating in local community meetings
- Voluntary group helping at our Victorian Cemetery.
- Genealogy

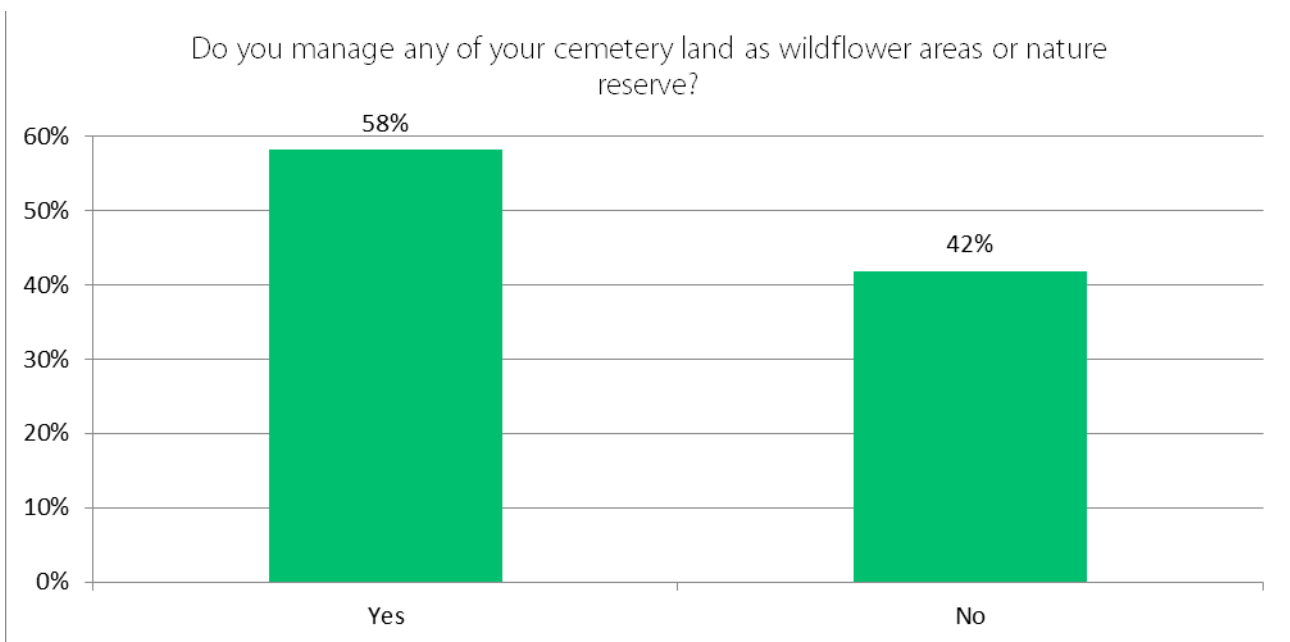


If yes, what elements have been transferred to community management/ownership?

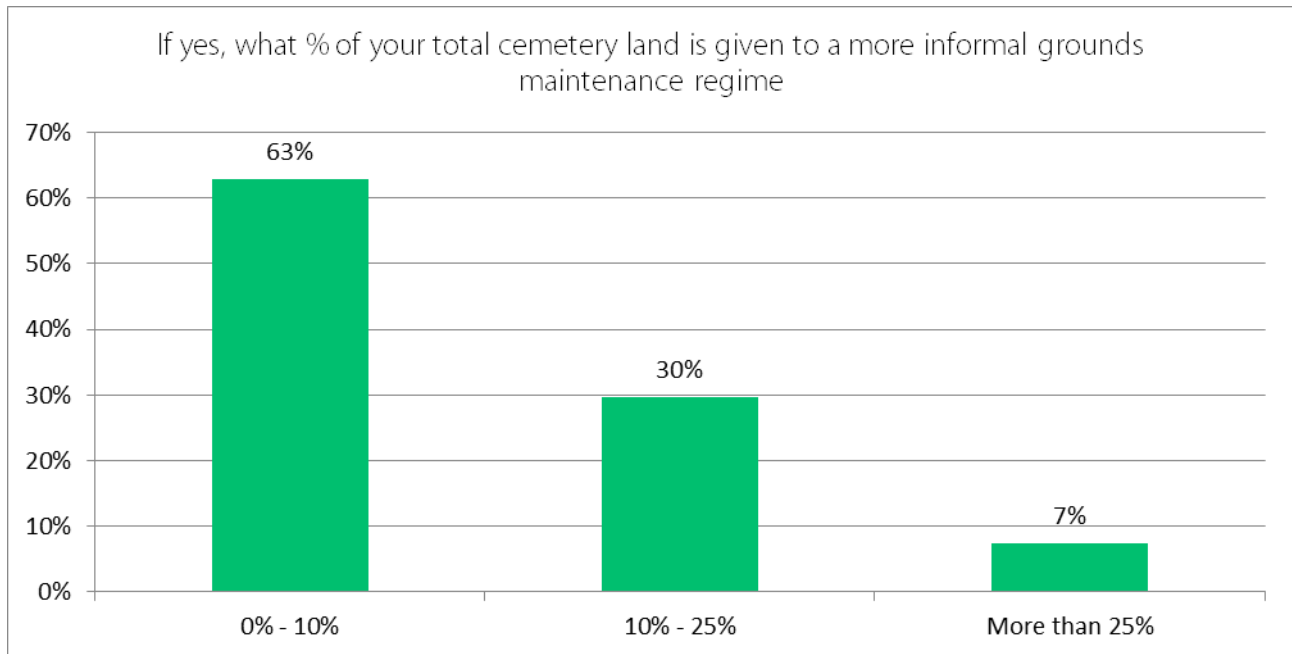
This still appears to be a very rare occurrence, as the only example was given. The single response stated they had transferred grounds maintenance for one of its cemeteries to community management.



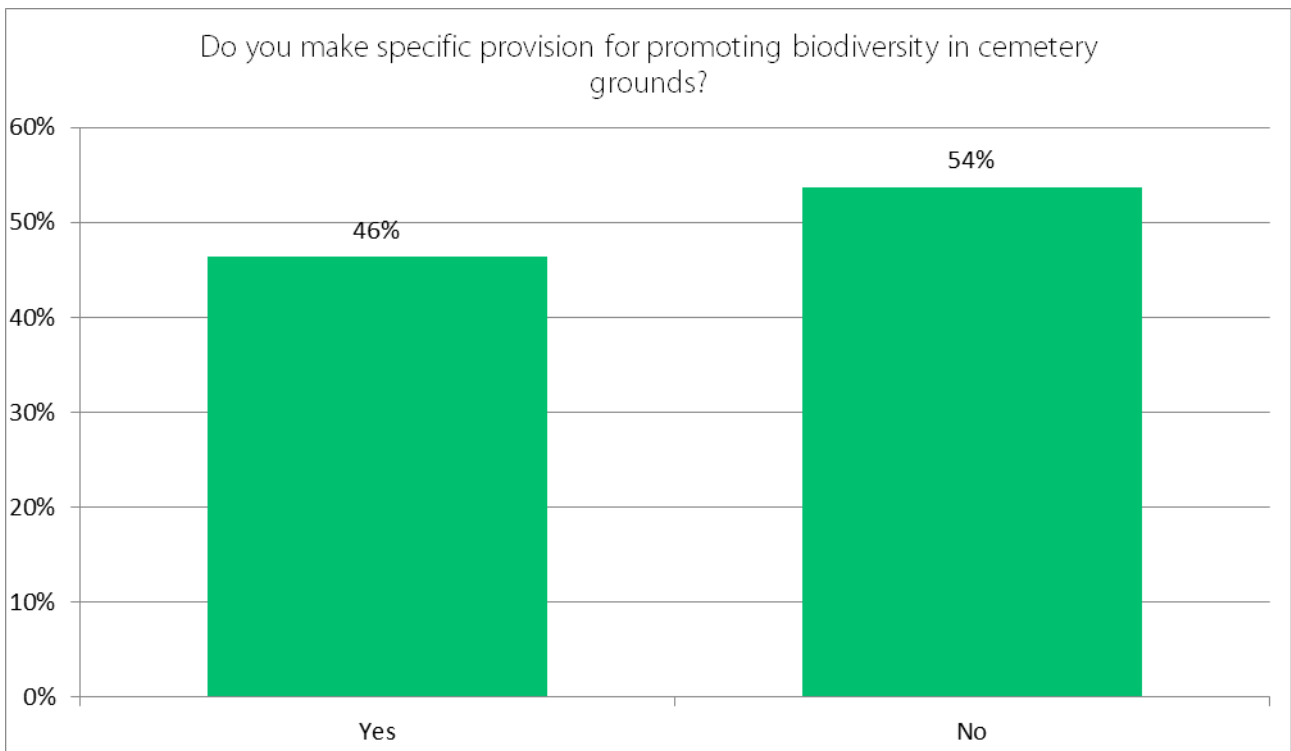
This result is welcome, as many of our cemeteries are the only greenspaces to which many people have access. In addition well-kept grounds are a clear signal to visitors that their loved ones final resting places are being well cared for.



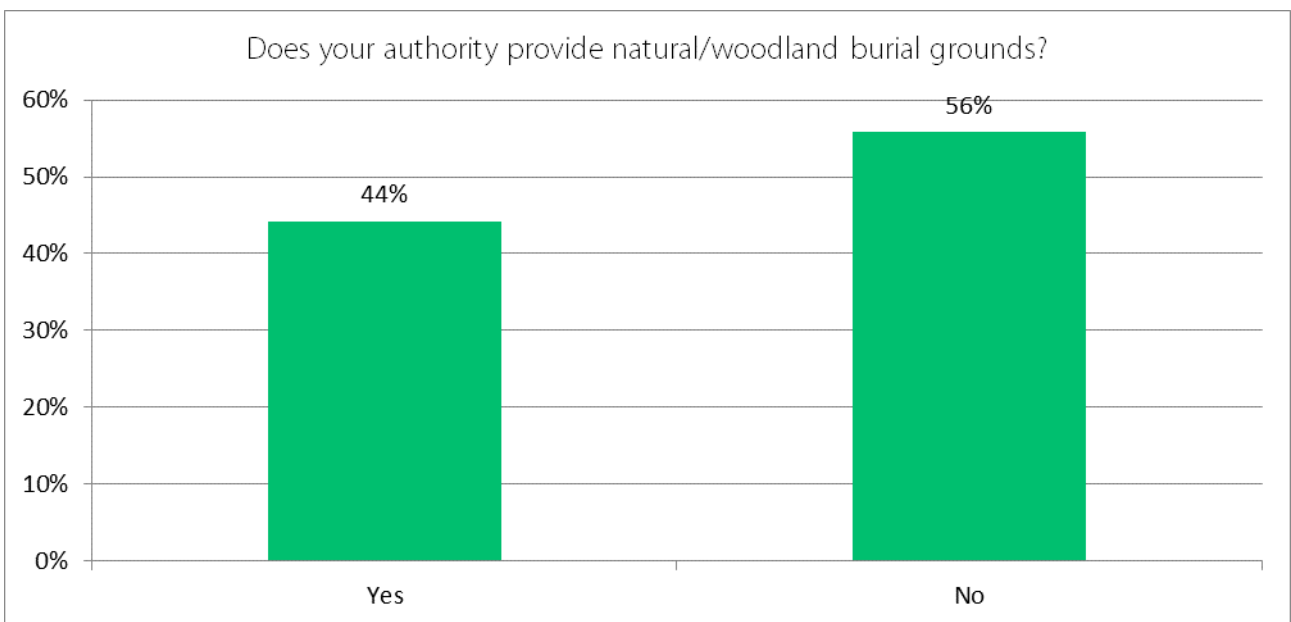
Many areas of older cemeteries are now being managed as wildflower areas which not only can provide an aesthetically pleasing appearance for cemetery visitors, but also provide havens for pollinators and local wildlife. There are many advisory leaflets available on how to make the best use of such areas in promoting wildlife. <http://www.caringforgodsacre.org.uk/>



Many local authority cemeteries are now incorporating informal grounds maintenance as an option, particularly within the older, less well visited areas of their cemeteries. It is important that visitor's see that these areas are not neglected, therefore mowing paths through these areas and perhaps installing information boards outlining the benefits to local wildlife and increasing biodiversity in general.



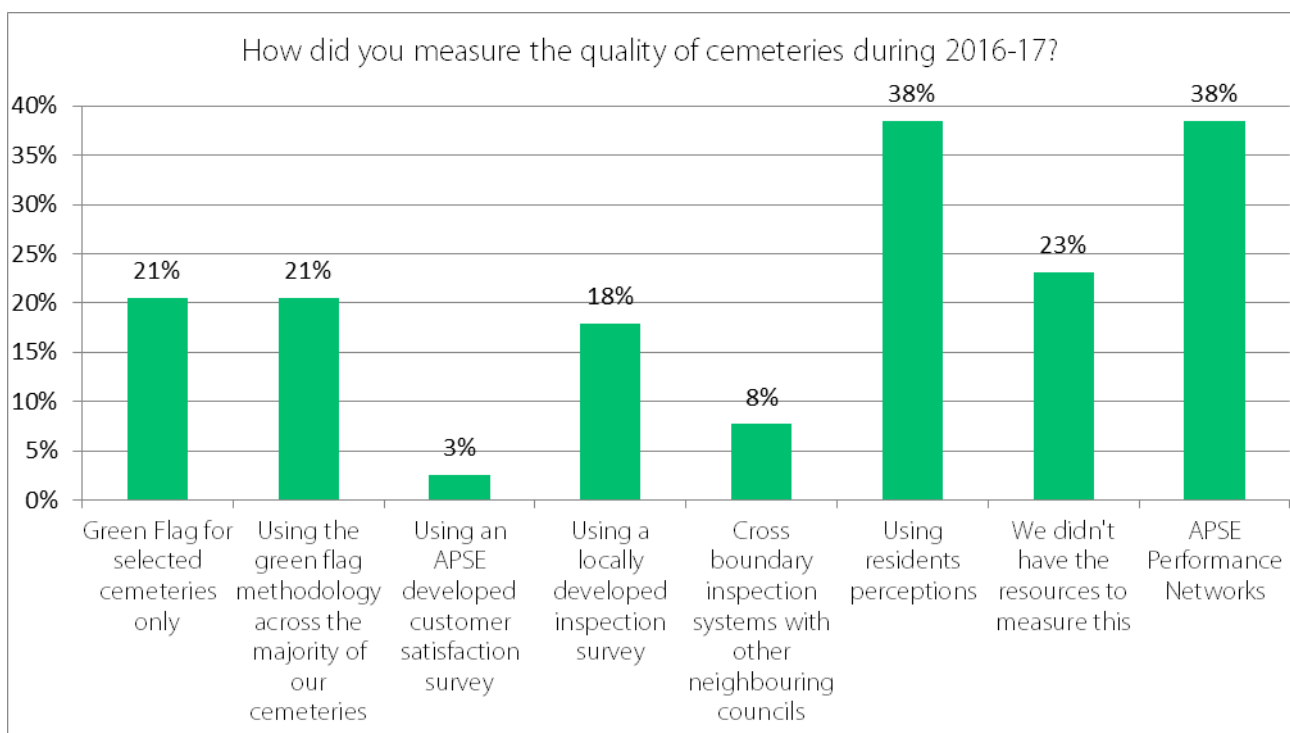
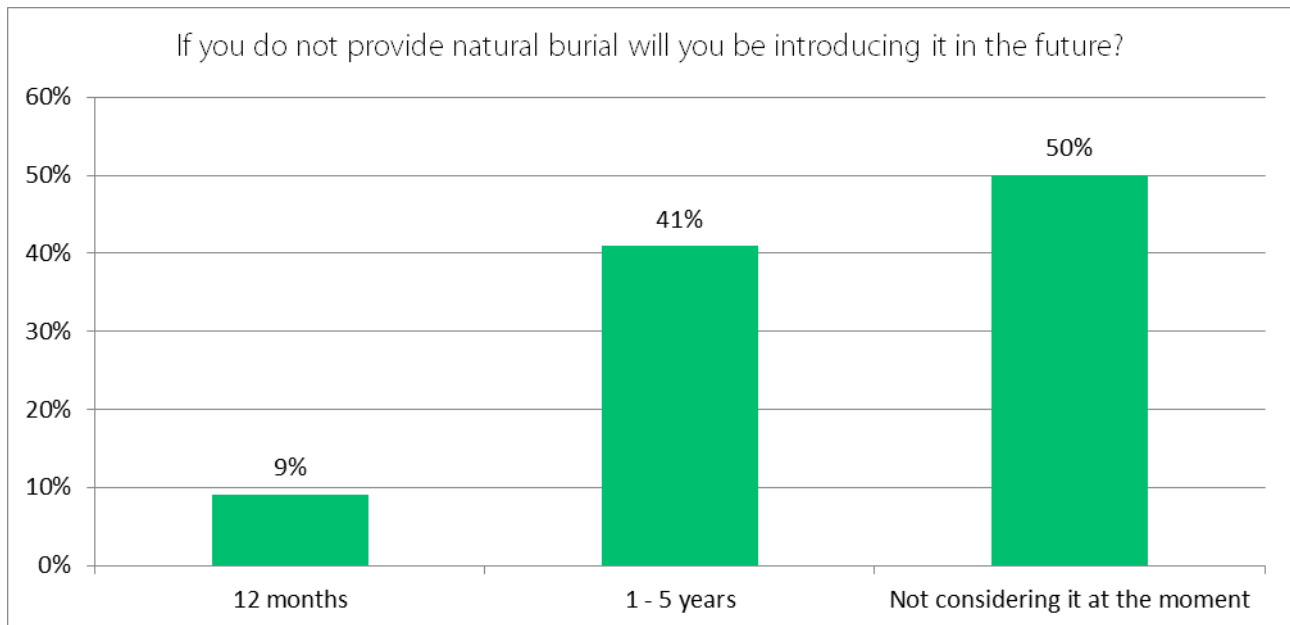
This graph shows almost half of all respondents now make provision for wildlife within their cemetery grounds. Whether this be as a result of reduced maintenance, or a deliberate policy to promote wildlife, such actions can only be applauded when local biodiversity is under such pressure.



The use of natural/woodland burial is obviously growing in popularity and many local authorities are now adopting this practice in order to provide an alternative to traditional funeral practices. It should be noted however that the quality of such areas is still a vital element of the service provision rather than simply providing an area which receives little or no maintenance on the pretext that it is a 'natural area'. There is government guidance available for those local authorities providing or considering such an approach in the future. <https://www.gov.uk/government/publications/natural-burial-ground-guidance-for-operators>

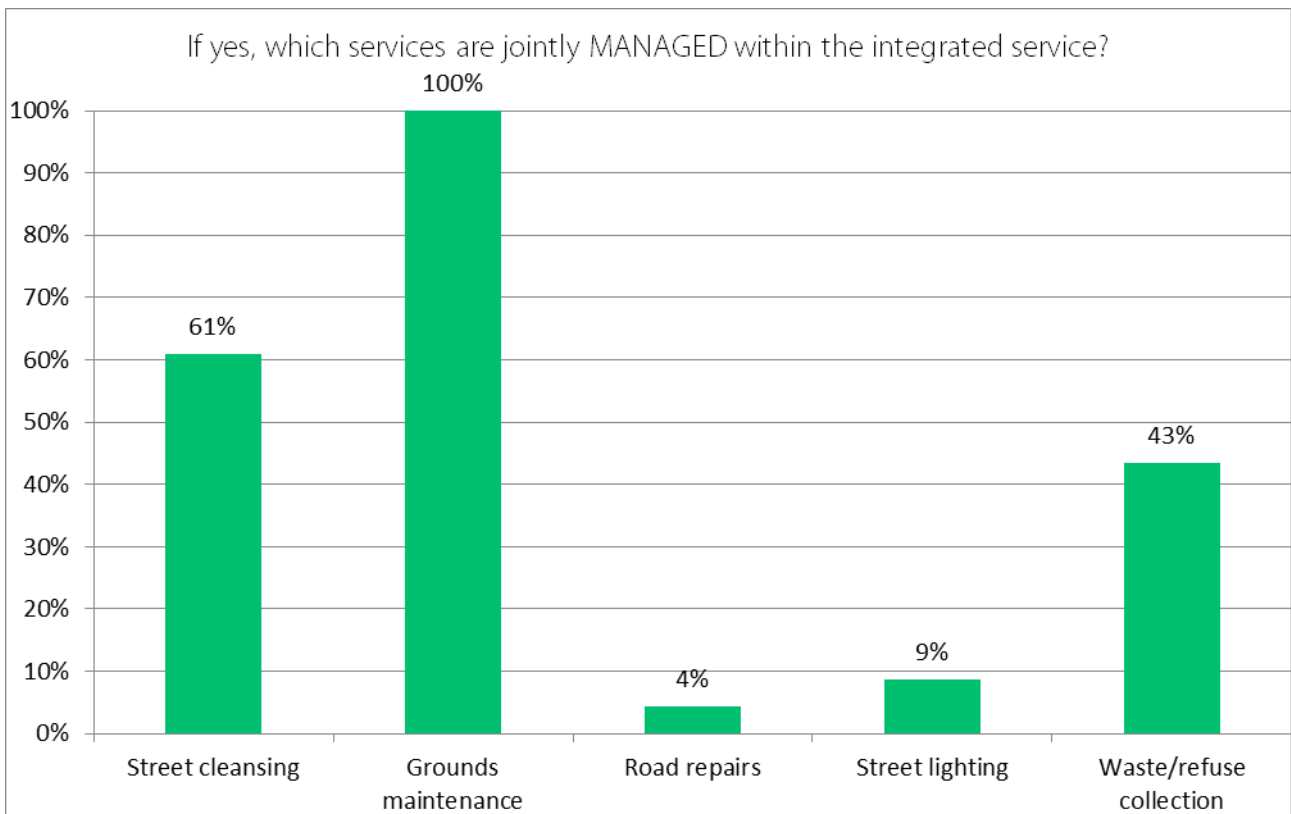
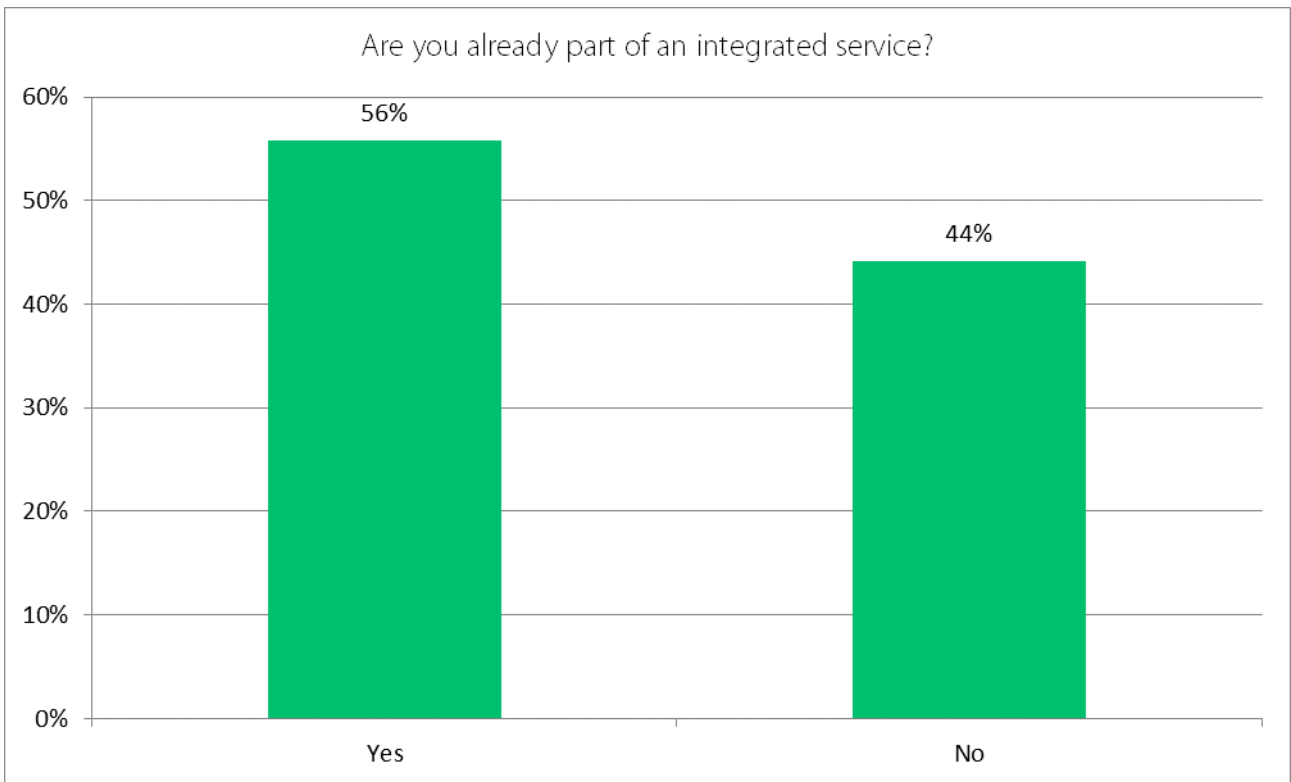
If yes, what % of burials in your authority use natural burial as the preferred method?

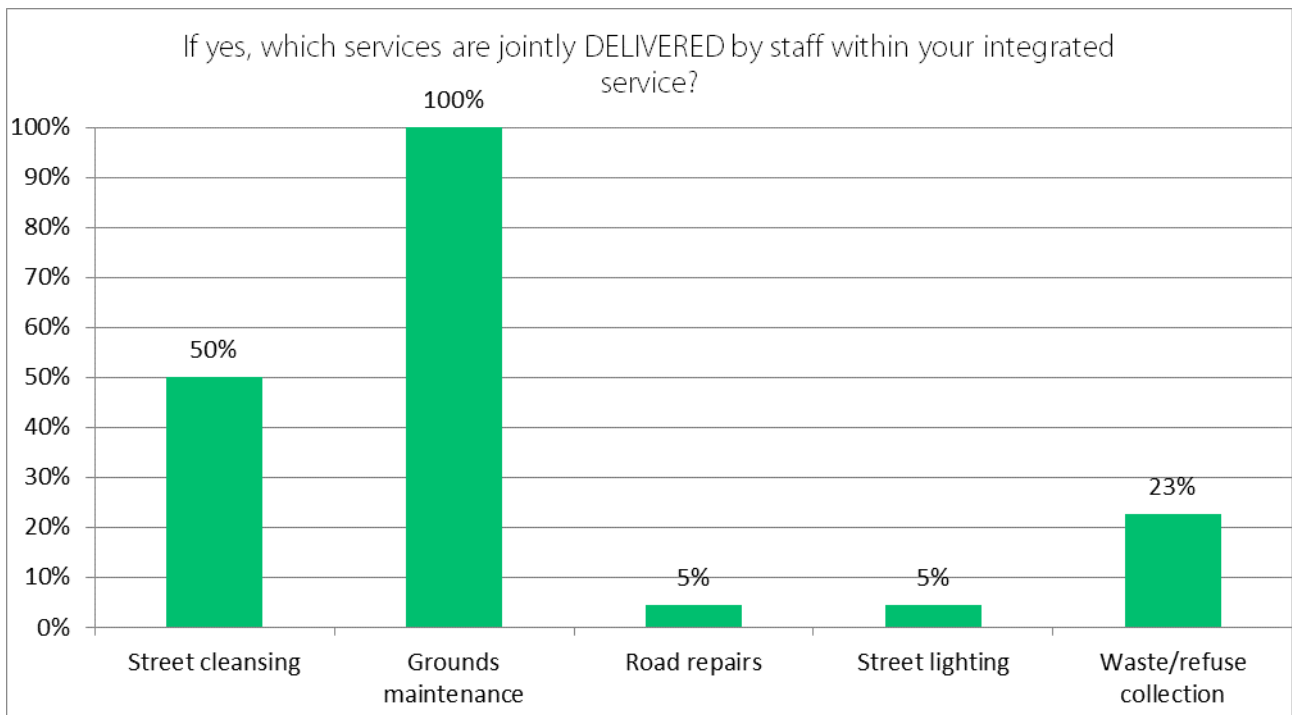
Of the respondents who replied to this question, (roughly a third of all those who completed the survey), the average response was that 10% of customers were choosing natural burial/woodland burial as their preferred choice.



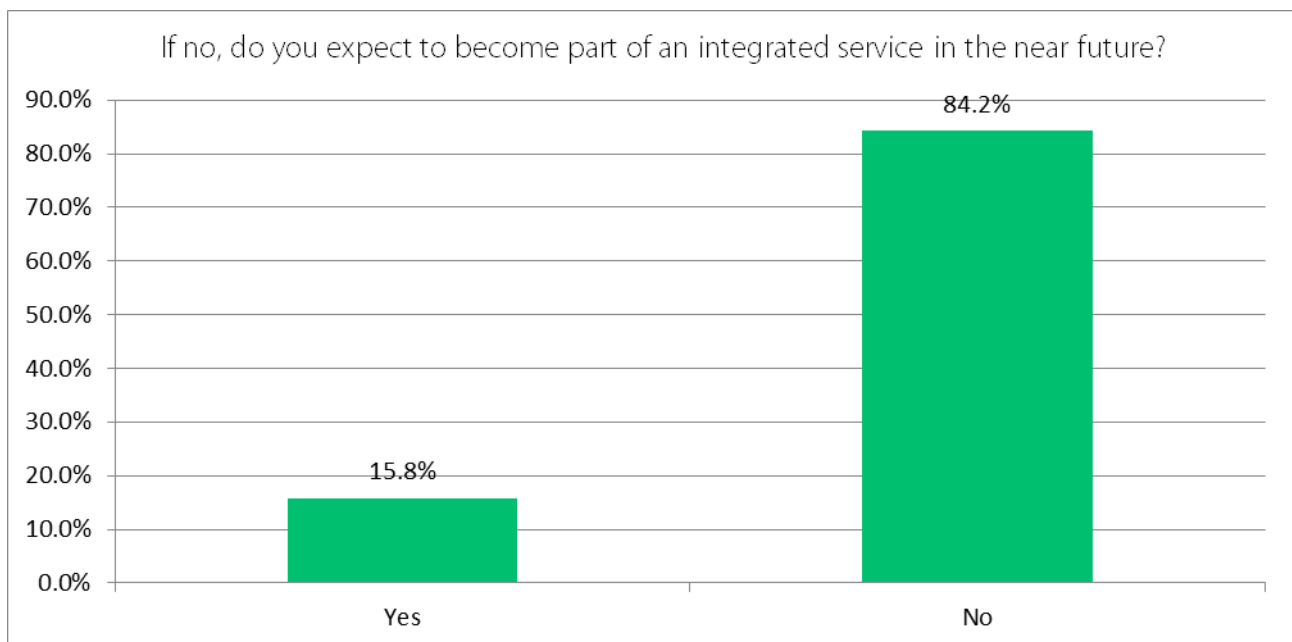
The need for a consistent and measurable quality standard has been an area APSE has been considering for a while. As such it has now introduced a separate element of the Land Audit Management System (LAMS) which can now be used to measure the quality of cemeteries.

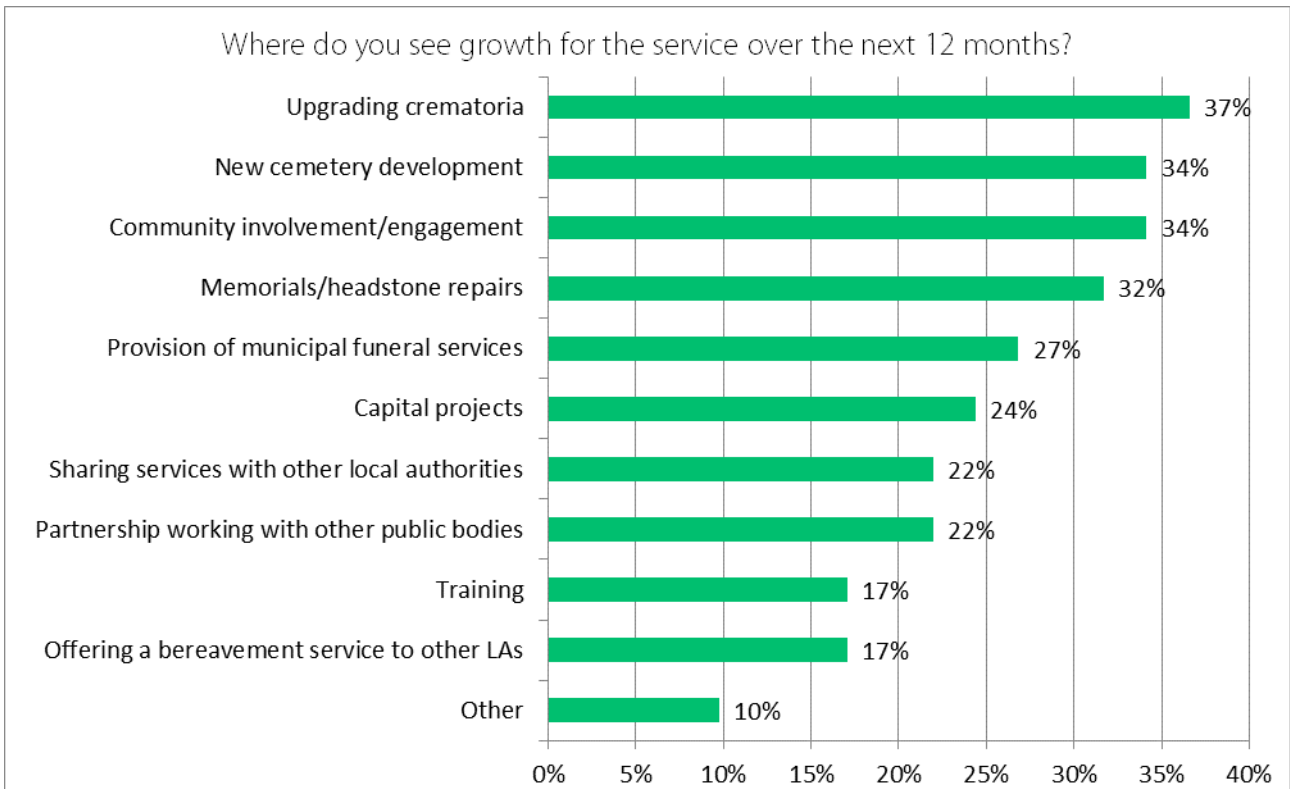
For further information details on the general land audit management system can be found [here](#).



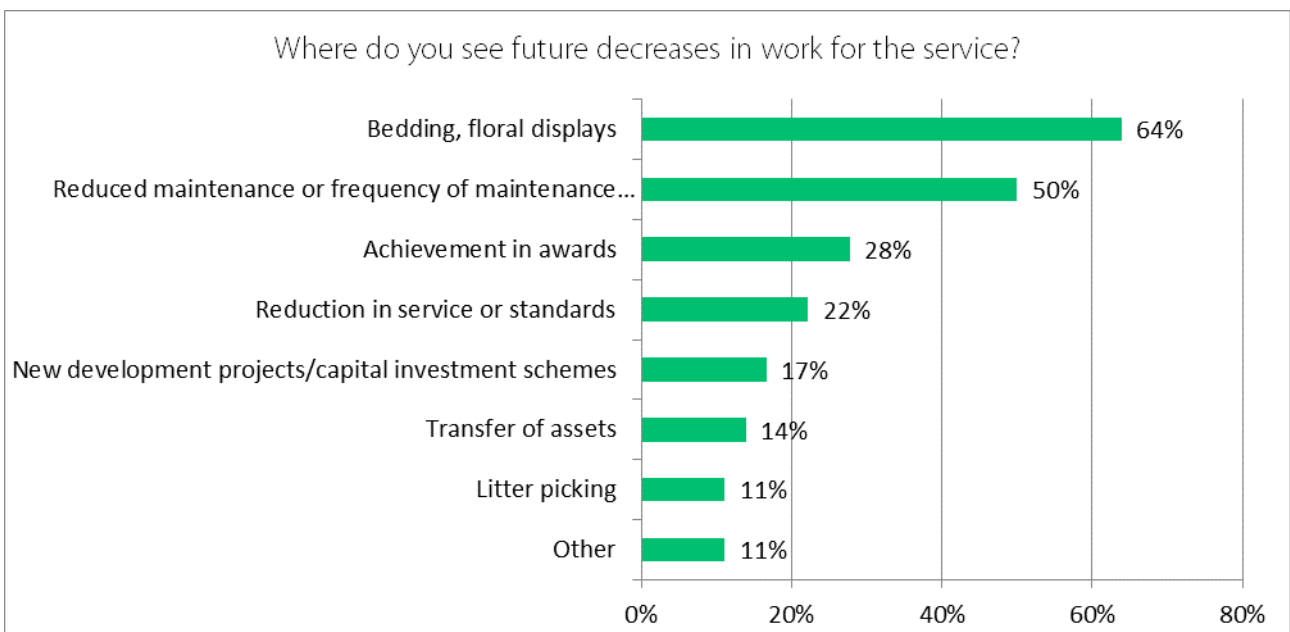


Currently over half of the local authorities run their cemeteries and crematoria services as part of a wider integrated service provision, usually as a result of the linkages with grounds maintenance and to a lesser degree street cleansing. However where there are often multi-tasking between street cleansing refuse collection and to a degree grounds maintenance, staff employed within cemeteries tend to remain quite specialised in their roles such as grave digging, operating cremators etc.

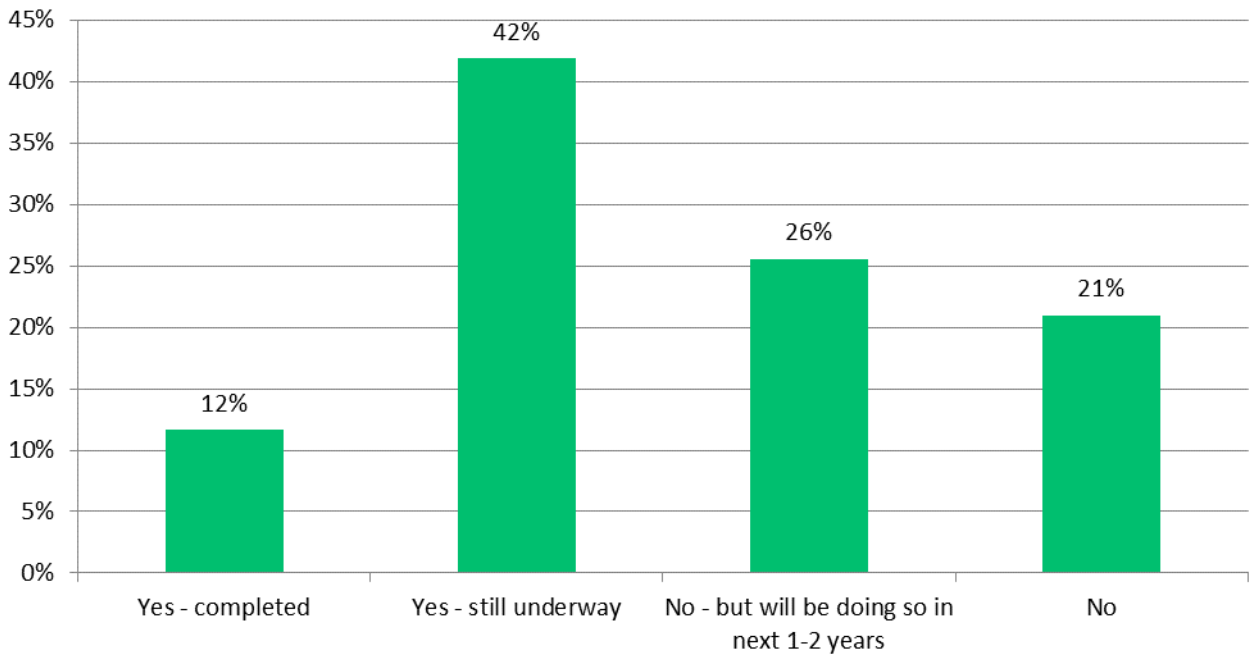




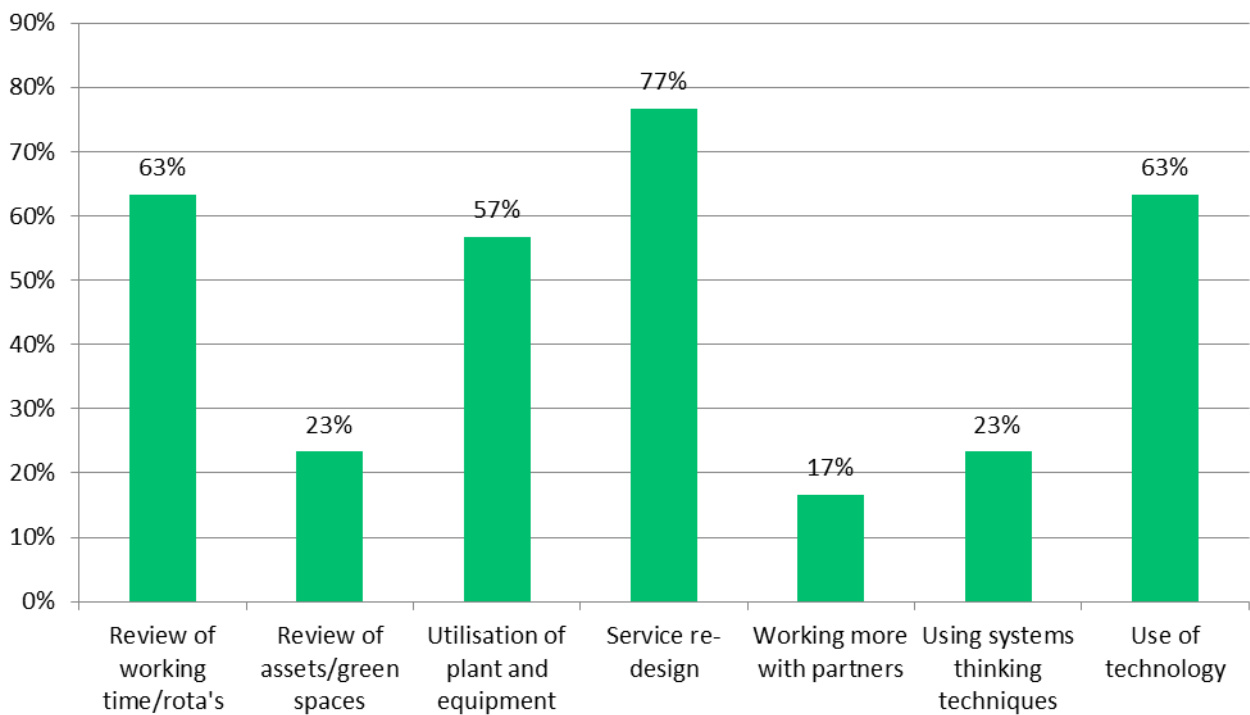
It is notable that areas of growth are quite diverse, ranging from legal and health and safety requirements, such as improving cremators and carrying out headstone inspections to improving cemeteries in general, i.e. new burial areas and new capital projects. Equally however, is the need to look at ways of addressing greater demands on the service such as providing municipal funerals and looking at how best to engage with local communities who may be able to help with some of the work required which can no longer be funded as effectively, examples of which can be seen in the following graph which highlights those areas of service provision which may need to be reduced.

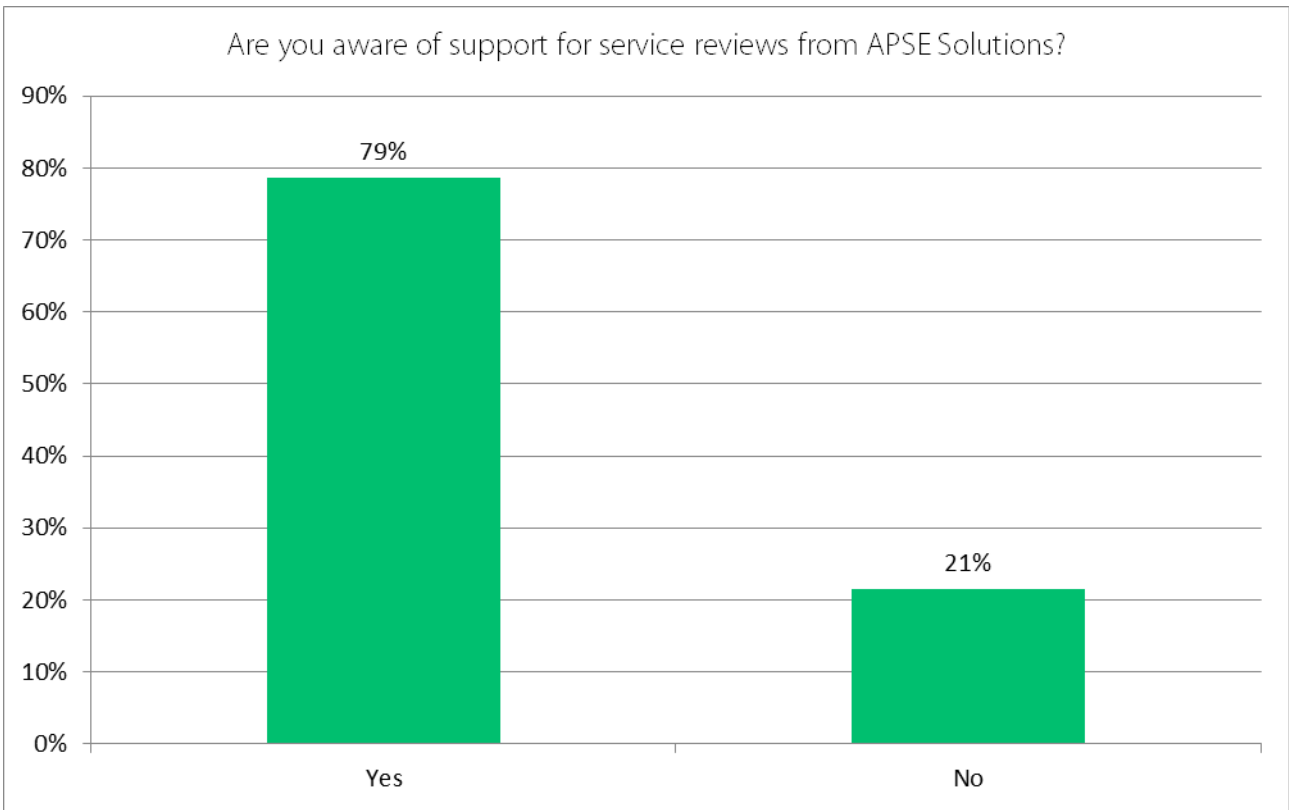


Have you undertaken a review of your service recently?



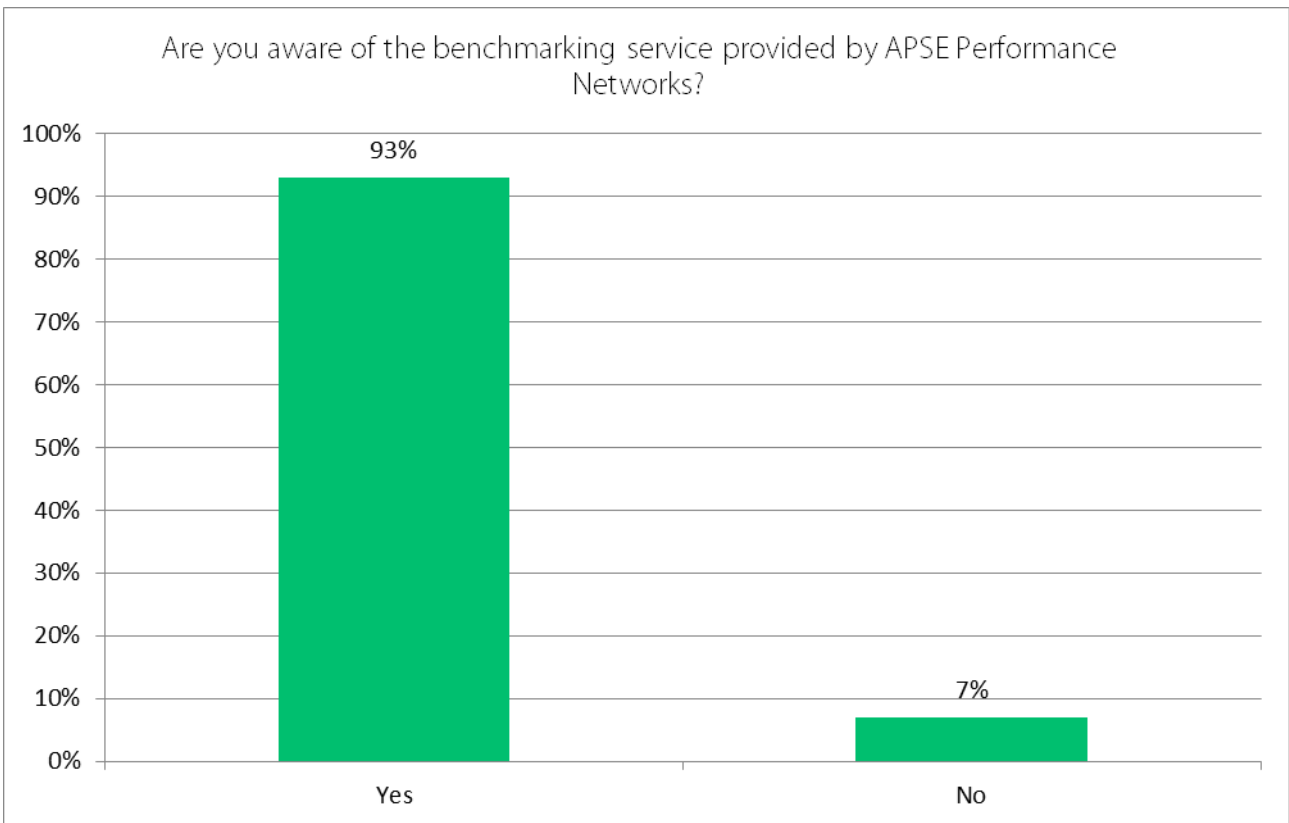
Will this review involve any of the following:





If you require further details about the services APSE Solution can provide please access the following link

<http://www.apse.org.uk/apse/index.cfm/solutions/>



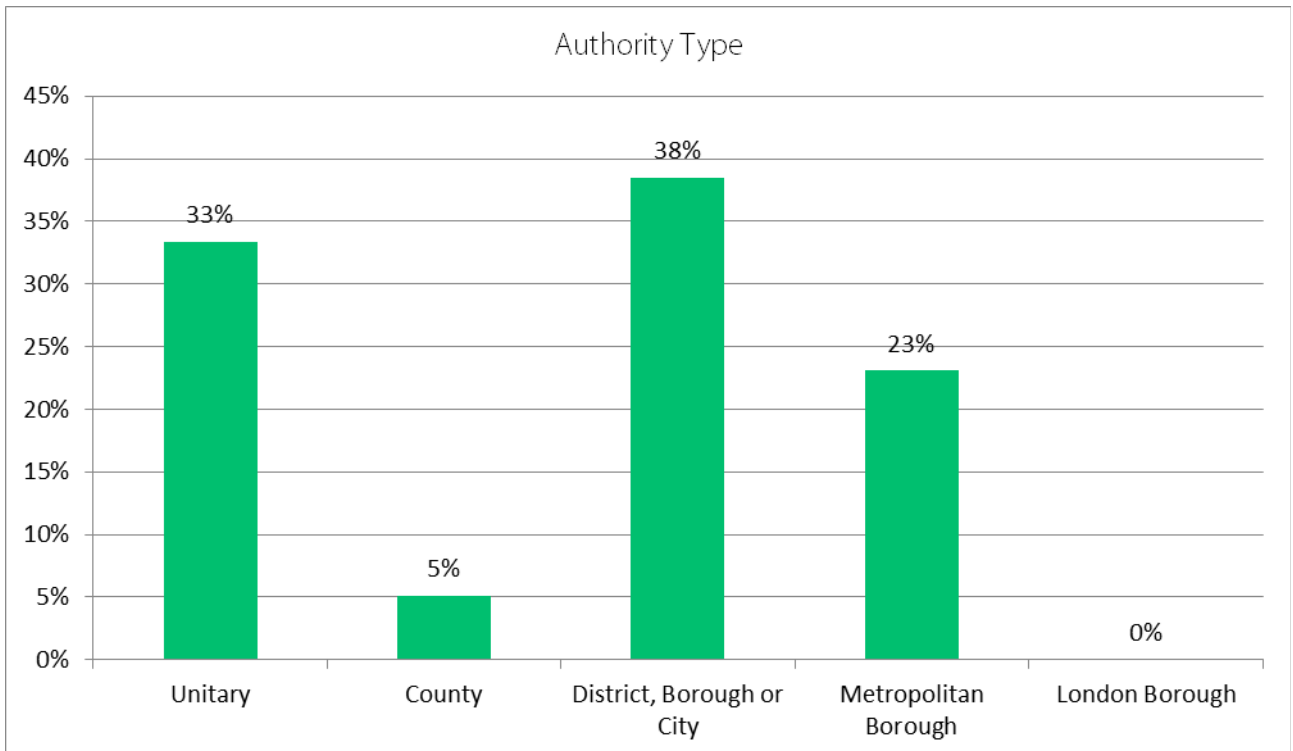
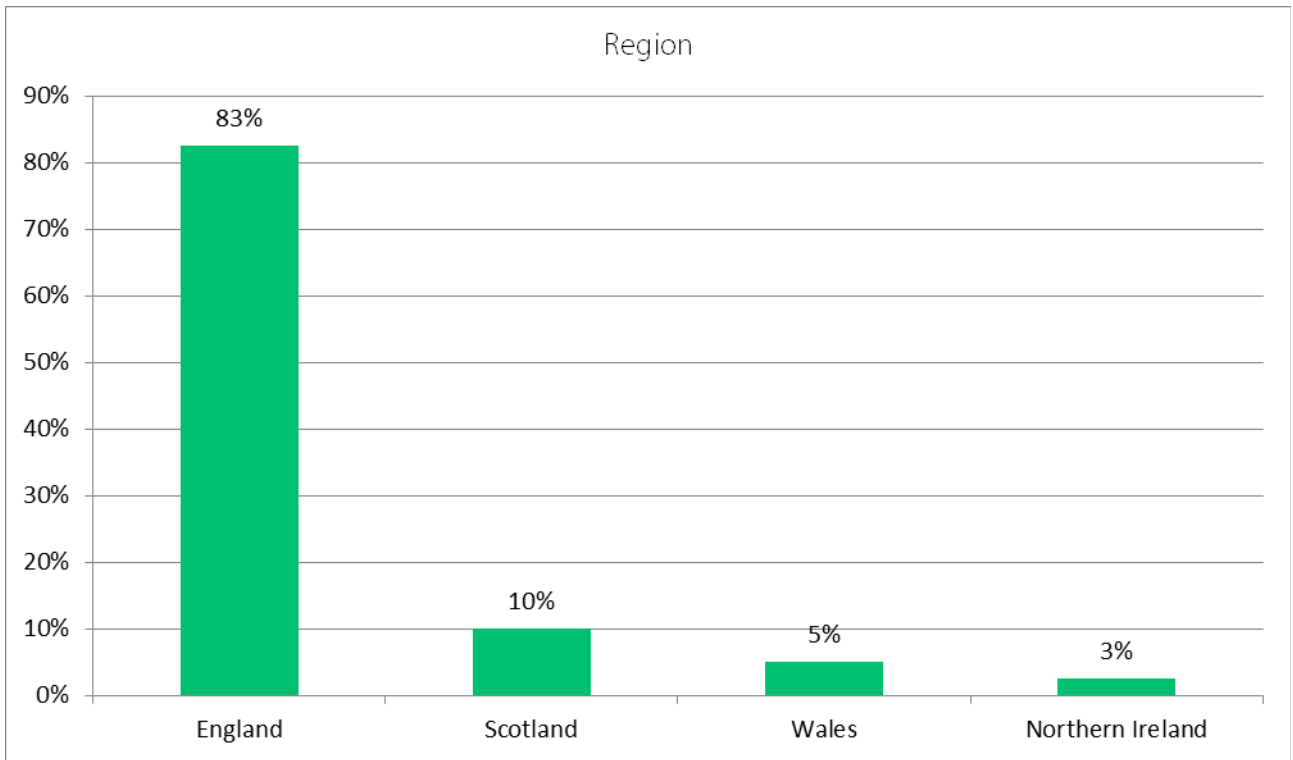
If you require further details about the services APSE Solution can provide please access the following link

<http://www.apse.org.uk/apse/index.cfm/performance-networks/>

APSE provides a regular Cemeteries and Crematoria Advisory Group that members may attend for free.

What cemeteries and crematoria related topics would you find most valuable in the near future?

- Management of unauthorised memorials / Memorial Enforcement Issues
- Work scheduling: balance burial work v grounds maintenance requirement
- Technology - poor software options,
- Digitisation of burial and cremation forms, computer management systems which would handle the former, data protection / privacy notices and MOJ forms, Medical Examiner.
- Multi faith burials
- Improving use of crematoria & cemetery buildings
- Woodland burials and memorial structures
- Medical Examiners
- Use of Volunteers
- Best practice examples; councils as funeral directors
- Natural Burial and integrated funeral directors
- Memorial Headstone Inspections and Repairs
- Income generating schemes
- Grey Water/ ground water pollution
- Municipal Funeral Services
- Establishing Cemeteries Friends Group
- Regulations of cremation
- Practical solutions for dealing with memorials in closed churchyards/ petitioning for a simplified system to manage safety in churchyards including waving of faculty fees to local authorities
- Opening new burial area
- Use of Columbaria
- How other authorities are planning for the future in terms of limited space.
- Business planning/modelling and implementation from ideas to services and products.
- Maintenance benchmarking.
- Surrounds versus lawn cemeteries
- Service reviews and outcomes / alternative ways of working / service configuration



APSE Comment

It is hoped that this inaugural State of the Market Survey will be a document to which Bereavement Services Managers and other interested parties can refer to when considering the key issues for Bereavement Services across the UK. The document will help provide access to new ideas and the opportunity to receive performance data which will help service planners and managers to readily understand the bereavement sector and its key issues more readily.

From the results, it is clear that Bereavement Services across the UK have not been subjected to the same level of budget cuts that other local authority services have suffered. However, this fact has not led to complacency, with respondents highlighting excellent examples of service improvement, income generation and improved user experiences.

The survey has also shown that there are common problems shared throughout the UK, with reducing availability of burial space, funeral poverty and changing cultural need regularly being referenced in the responses. Such issues and their solutions are regularly discussed via the network query service APSE provides.

Interestingly, what has arisen out of the survey is the importance given to mitigating the environmental impact bereavement services operations have and the ways in which managers are addressing these issues. This is shown through reduced cremator emissions, natural burial options, environmentally friendly grounds maintenance regimes and increasing the opportunities for biodiversity within cemetery grounds.

The information gathered from the survey will be used by APSE to inform the services it offers to its members, in order to ensure its briefing papers, advisory groups and seminars reflect these key issues in the future.

It is proposed that the State of the Market survey now becomes an annual survey to allow trend analysis to be carried out and to ensure APSE's members are kept up to date with the latest Bereavement Service issues and innovations.

The Association for Public Service Excellence

APSE member authorities have access to a wide 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:

- Facilities Management and Building cleaning
- Catering
- Environmental Health / Trading Standards
- Cemeteries and Crematoria
- Housing, construction and building maintenance
- Local authority 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

If you require any further information on the findings of this State of the Market survey 2016 please contact Wayne Priestley Principal Advisor for Environmental Services at wpriestley@apse.org.uk

The APSE Cemeteries and Crematorium Seminar 2018 will take place on Thursday 19 April 2018 at the Welcome Centre, Coventry. You can view [details here](#).