



membership resources

# State of the Market Survey 2013

## Local Authority Parks Services



**Briefing 13/38**  
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## Local Authority Parks Services

### State of the Market 2012

APSE conducted an on-line survey during July and August 2013. This follows on from the 2012, 2010 and 2008 Parks State of the Market survey where similar questions were asked to allow for trend comparisons. The 2012 results briefing can be accessed by clicking [here](#), the 2010 results briefing can be accessed by clicking [here](#) and the 2008 results briefing can be accessed by clicking [here](#). 112 responses were received from local authorities throughout the UK. This report identifies the key findings of the survey compared to the 2012, 2010 and 2008 findings.

### Results from the survey

#### a) Your opinions

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

Answer Options	Disagree Strongly	Disagree	Agree	Agree Strongly	No Opinion
The squeeze on public sector resources is affecting parks disproportionately to other service areas	0.0%	30.9%	30.9%	<b>34.5%</b>	3.6%
Reductions in funding has resulted in a withdrawal of maintenance from some land and an increase in 'natural' areas*	0.9%	18.9%	<b>42.3%</b>	36.0%	1.8%
Lack of investment in parks will have health and social impacts	0.0%	1.8%	39.1%	<b>59.1%</b>	0.0%
There is a clear link between parks/play provision and levels of crime/anti-social behaviour*	0.9%	9.1%	<b>45.5%</b>	36.4%	8.2%
There's a limit to the extent to which volunteers can be involved in delivering parks services	1.8%	7.2%	31.5%	<b>59.5%</b>	0.0%
Environmental issues are a priority for parks services	0.0%	9.1%	<b>53.6%</b>	35.5%	1.8%
The public should get free access to all parks	0.0%	10.9%	20.9%	<b>62.7%</b>	5.5%

\*New questions for 2013

65% either 'agree' or 'agree strongly' that 'the squeeze on public sector resources is affecting parks disproportionately'. The reduction trend of respondents agreeing or agreeing strongly to this statement continues, reducing from 86% in 2008 and from 74% in 2010. This could represent the fact that the scale and depth of financial pressures is such that respondents recognise all service areas are being heavily impacted. A new question for 2013 was whether the reduction in funding has resulted in the withdrawal of maintenance and an increase in 'natural' areas. 78% of respondents either agreed or agreed strongly with this statement, with many respondents also highlighting this reaction to the cuts within the questions comment box.

The level of support for other questions which remained relatively consistent from 2010 survey responses included: the importance of environmental issues, that a lack of investment in parks will have a health and social impact, as well as the extent to which volunteers can be involved in delivering parks services. A new question that was asked this year was around the clear link between parks/play provision and the levels of crime/anti social behaviour. 82% of respondents either agreed or strongly agreed with this statement, showing the strength of opinion that parks and open spaces can contribute to wider social outcomes.

There has been a slight drop in the number of respondents agreeing or agreeing strongly with the statement that access to parks for the public should be free, with the response rate resting at 84% from a high of 88%/87% in 2010/2012 respectively. However the majority still strongly agree with this statement.

The 2013 survey asked a new question this year around what environmental issues are a priority for your parks and green space service. The word cloud below captures respondents' contributions to this question. The larger the word appears the more frequently it was expressed as an environmental issue priority.

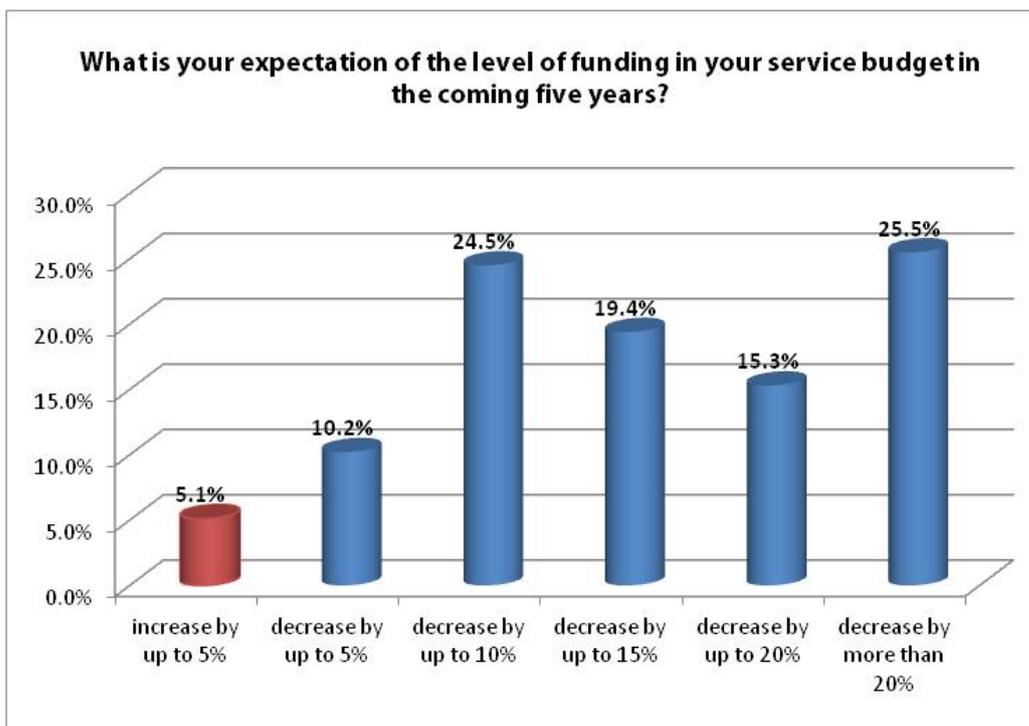


From the word cloud you can see that 'biodiversity' was the most frequent response and therefore one of respondents' top environmental priority within the parks service. Biodiversity was closely followed by litter control, with dog-fouling, climate change and water management listed quite high on environmental priorities list.

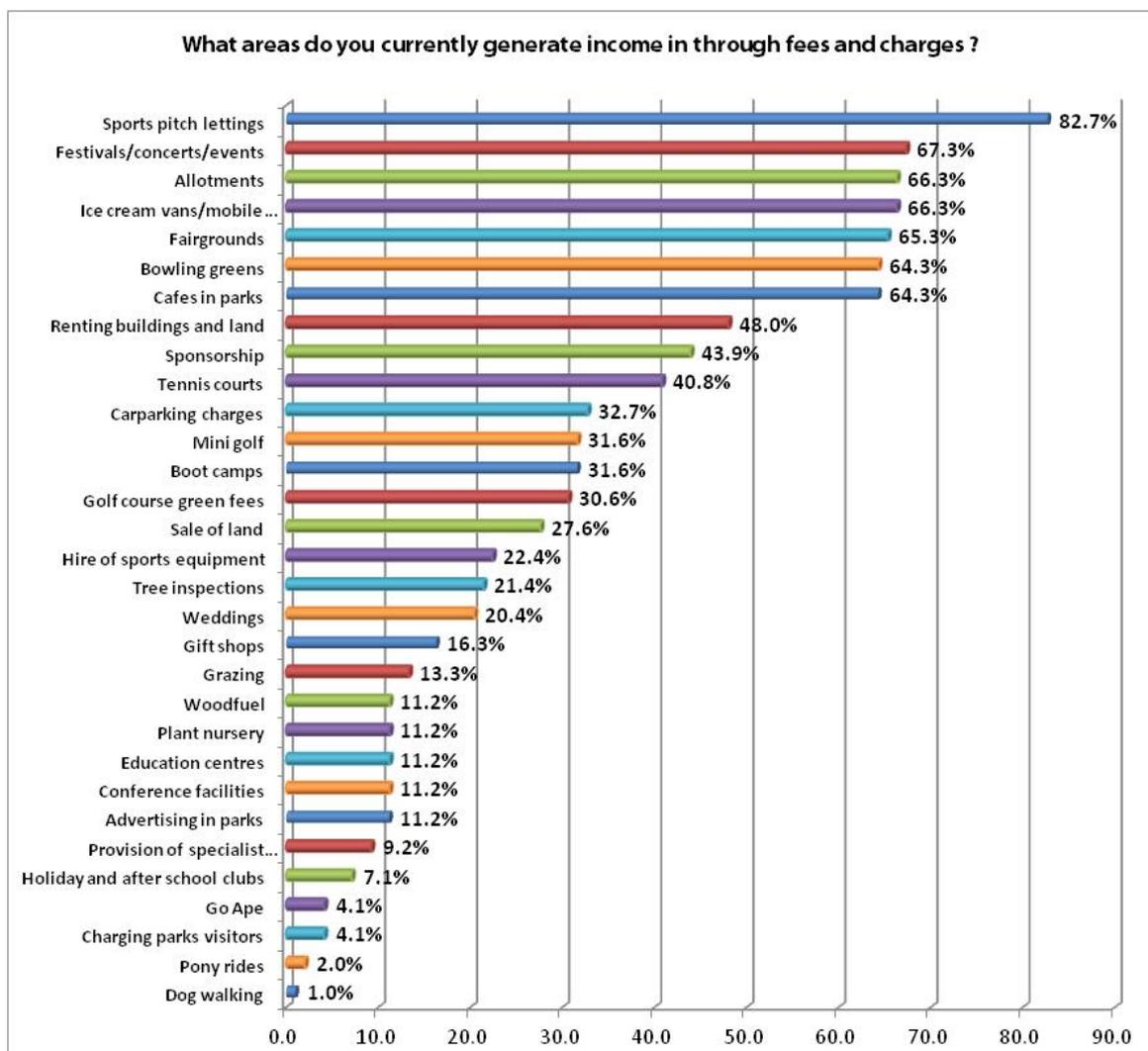
**b) Budget expectations**

There has been a slight drop in the percentage of respondents who expect the parks budget to change over the next year, from 89.8% in 2012 to 83% in 2013. Of those who expected a change in the parks budget, 95% expect a decrease in revenue (a jump from 86% in 2012) and 72% expect a decrease in capital. To meet efficiency pressures, 72% of respondents are intending to increase fees and charges over the next 2-3 years (a drop of 10% from 2012 survey). The graphs overleaf provide additional analysis.

In the next 5 years, the expectation of the level of funding in their service budget is as follows:



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



71.9% of respondents intend to increase fees and charges over the next 2-3 years to meet efficiency pressures.

With many looking to increasingly generate income, this year we asked respondents what the barriers were to income generation in the local authority parks service. The word cloud below captures respondents' contributions to this question. The larger the word appears the more frequently it was expressed as a barrier to income generation. The biggest barriers according to those responded were public and political resistance to income generation activities in parks services, closely followed by the lack of time and experienced staff to bring in new income generating schemes.

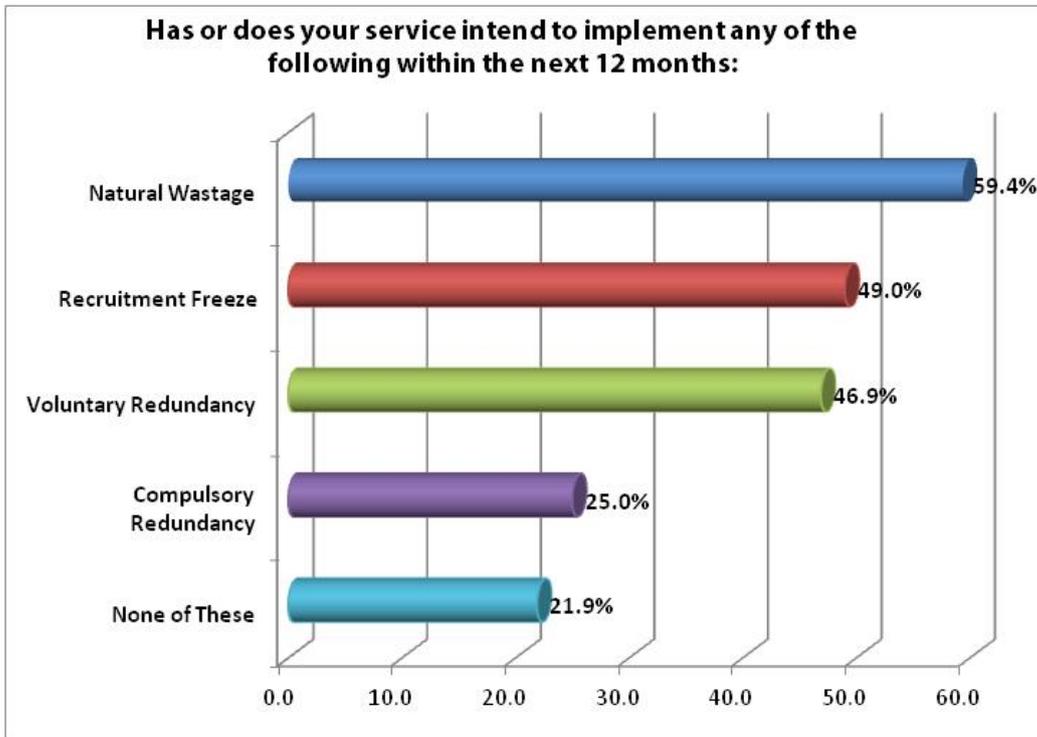


Aside from fees and charges income generating activity, the majority of parks services obtain additional funding from section 106 money (91.5%). There has been a drop in the number of respondents stating the National Lottery Heritage Fund as a source of additional funding from 77% in 2012 to 67.0% in 2013. Friends of Parks groups have been a growing source of additional funding with 69.1% of respondents using this source of additional funds along with grant funding from other trusts (55.3%). There are still a small number of respondents accessing sponsorship (40.434%) and private funding (13.8%) but again these percentages have dropped from 2012.

Respondent were asked whether they sold their services outside of the Local Authority. 31.4% currently sell services to the private sector (a drop from 38% in 2012) and 48.8% sell services to other public sector bodies (a 2.8% increase from 2012).

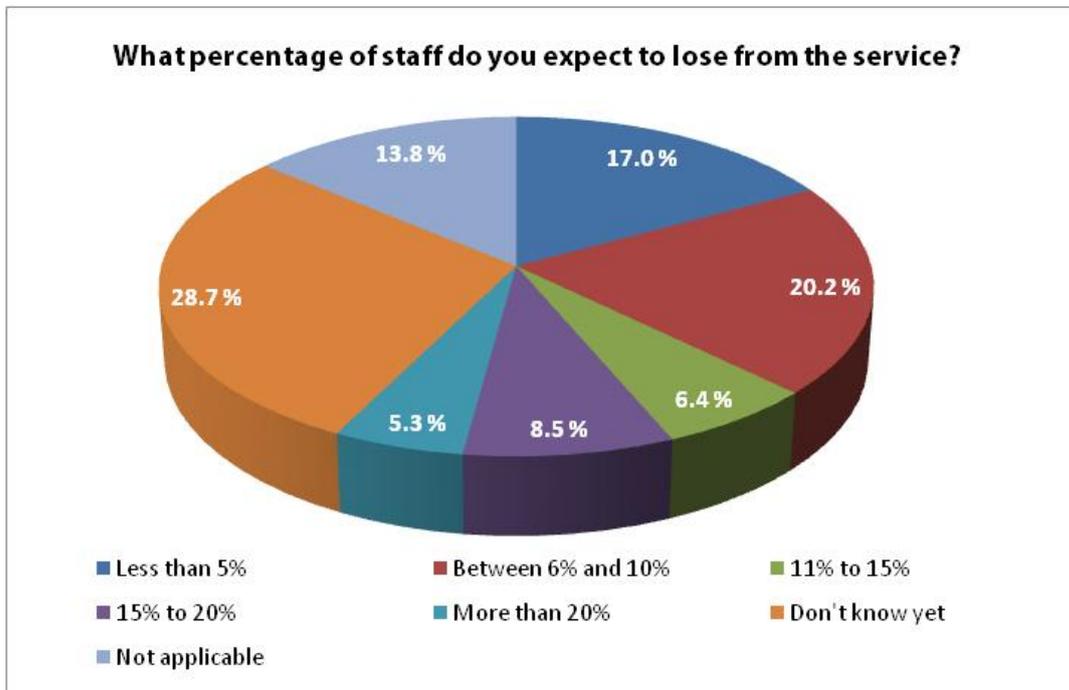
### **c) Staffing**

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:



These figures are on the whole very similar to last years responses with the biggest difference being 4% more people having to bring about one of the HR staffing policies listed.

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:

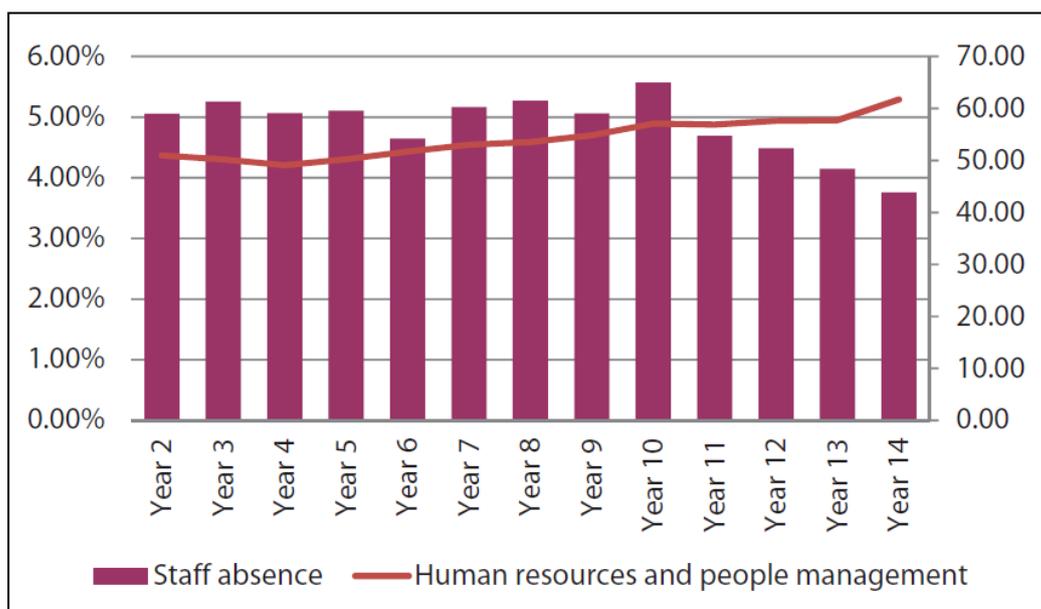


Members were asked whether they thought that staff absence levels are at an acceptable level. The responses are shown in the chart below:

Are staff absence levels at an acceptable level?	
Answer options	Response Percent
Too high	10.1%
Slightly above average	16.9%
About average	<b>41.6%</b>
Slightly below average	15.7%
Very low	15.7%

From 2012 results there has been a rise in respondents reporting staff absence levels as about average and a drop in respondents stating above average or too high absence rates.

APSE’s benchmarking service [performance networks](#) has shown an improvement in staff absence to the lowest figure achieved in the past 13 years, now standing at 3.74%. In conjunction with this, local authority parks services have continued to improve their performance in human resources and people management (investment in training, development and health and safety). This indicator has increased from 57.72 in 2010/11 to 61.71 in 2011/12; the highest figure ever recorded in performance networks for this service. The following chart has been extracted from the APSE performance networks summary report 2011-12.



In terms of staff training, 59.6% thought that the training budget will stay the same over the next 12 months and 32.6% thought it was going to decrease. Compared to 2012 results these responses show an increasing strain on training budgets with an 11% increase in those who stated the training budget would decrease.

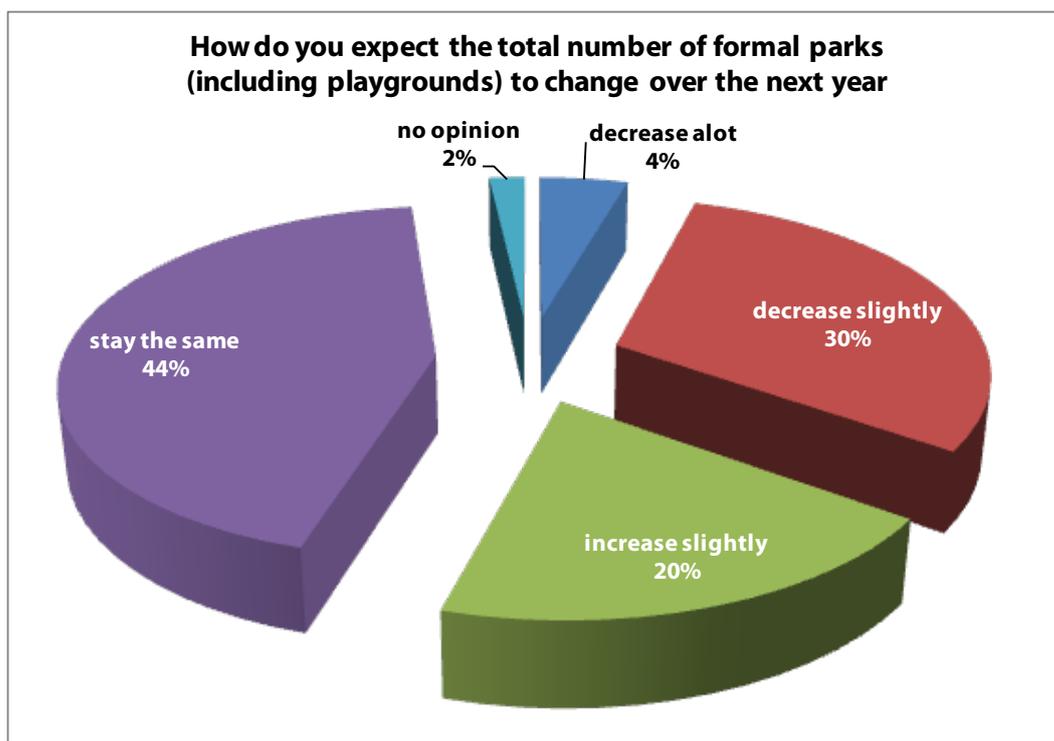
67.8% respondents stated that they currently have apprentices and 64.2% thought they were going to recruit apprentices in 2013-14- both increasing percentages from the 2012 survey results. Therefore, despite the budgetary pressures, it is encouraging to note that this isn’t translating into a reduction in the number of apprentices being developed through the parks service.

## d) Number of parks and visitor numbers

The state of the market survey has tracked the change in response since 2009 to the question 'Overall how do you expect the total number of parks (including playgrounds) to change over the next year?'.

In 2008, 43% replied 'increase slightly' and 33% said 'stay the same'. In 2010, 34% replied 'stay the same' and there was an increase in the percentage of people who responded that they expect the number of parks to decrease slightly (34% chose this option). In 2012 these figures rose again, with 43% expecting them to stay the same and 37% expecting them to decrease slightly.

These figures have begun to plateau with 2013 responses similar to 2012, with 44% of people who responded expecting them to stay the same and 30% expecting them to decrease slightly. This may be a reflection of budget constraints within local authorities and the continued strategy of some council's looking at transferring some of their assets.

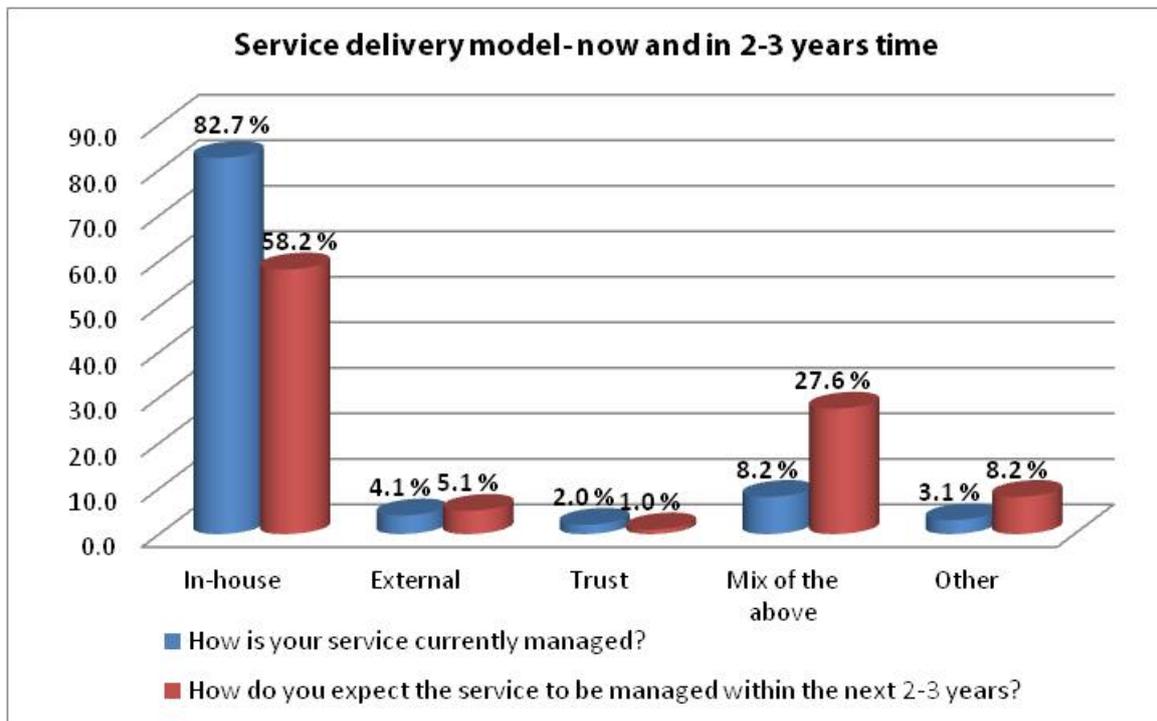


When asked about the numbers of visitors to their formal parks during the past year, 55.7% responded an increase, 4.5% a decrease in visitors and 39.8% reported visitor numbers had stayed the same.

## e) Service delivery

Whilst 83% currently have in-house services, 58% expect to be managed in-house in the next 2-3 years. This expectation level is back to 2010 levels and represents a drop from 63% in 2012. When asked how they expect the service to be managed in 2-3 years time the biggest increase was in an expected mix provision of in-house, external and trust arrangements.

The actual percentage that is managed in-house has remained at similar levels to those in 2010. This demonstrates the continuing relevance of in-house provision in a difficult economic climate.



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:

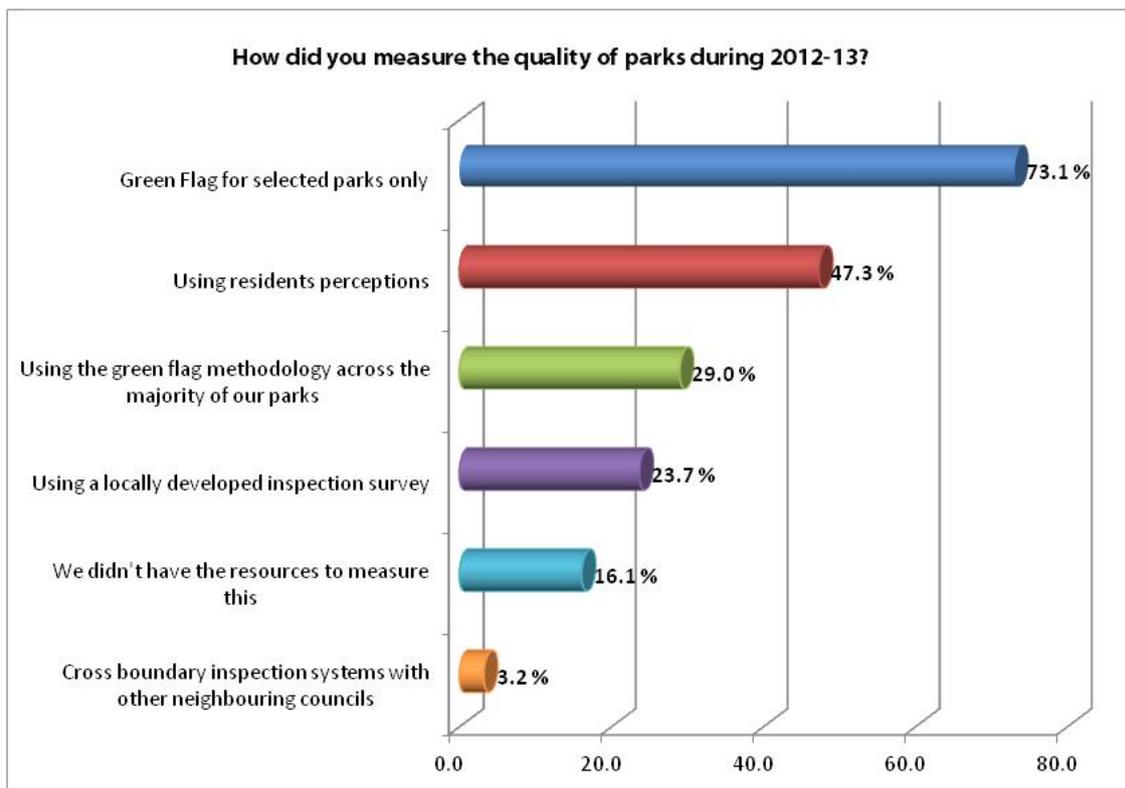
- 48.9% reported to having park rangers, which is the lowest response level seen from 2008-2012 survey collection period. 57% have some level of on-site presence within their parks with 4.5% having an on-site presence in all of their parks compared to 2.5% in 2012 and 11% in 2010.
- 67.9% have parks management plans in place, which is a similar percentage to 2012 results.
- 69.3% have dog control orders in parks and green spaces and 64.8% have on-the-spot fines for litter. Both a slight increase to the levels reported in the 2012 survey.
- 70.8% have seasonal labour (compared to 78% in 2012, 86% in 2010 and 74% in 2008). Of those who have seasonal labour, on average 20.8% of their workforce are employed on these terms.
- 59.1% have annualised hours (compared to 64% in 2012). Of those who have annualised hours, on average 73.7% of their workforce are employed on these terms.

## f) Service standards and quality of service

The survey asked, over the past year, which services have increased, decreased and stayed the same. The main areas of increase were events (28% stated that this has increased) and enforcement (25%). The main areas of decrease were bedding/flower displays (76.1% stated that this has decreased) and frequency of cuts (48.45%). Over 70% of respondents stated that play inspections and the maintenance of play equipment have stayed the same.

In this years survey we asked for respondents to state their average number of grass cuts (amenity) per annum. Although this is a very difficult thing to ask as number of cuts depends on weather conditions and land use, 28.8% stated 10 cuts or less, 42.5% stated 11-15 cuts per annum, 25% 16-20 cuts and 3.8% stated they cut their amenity sites grass 21 times or more.

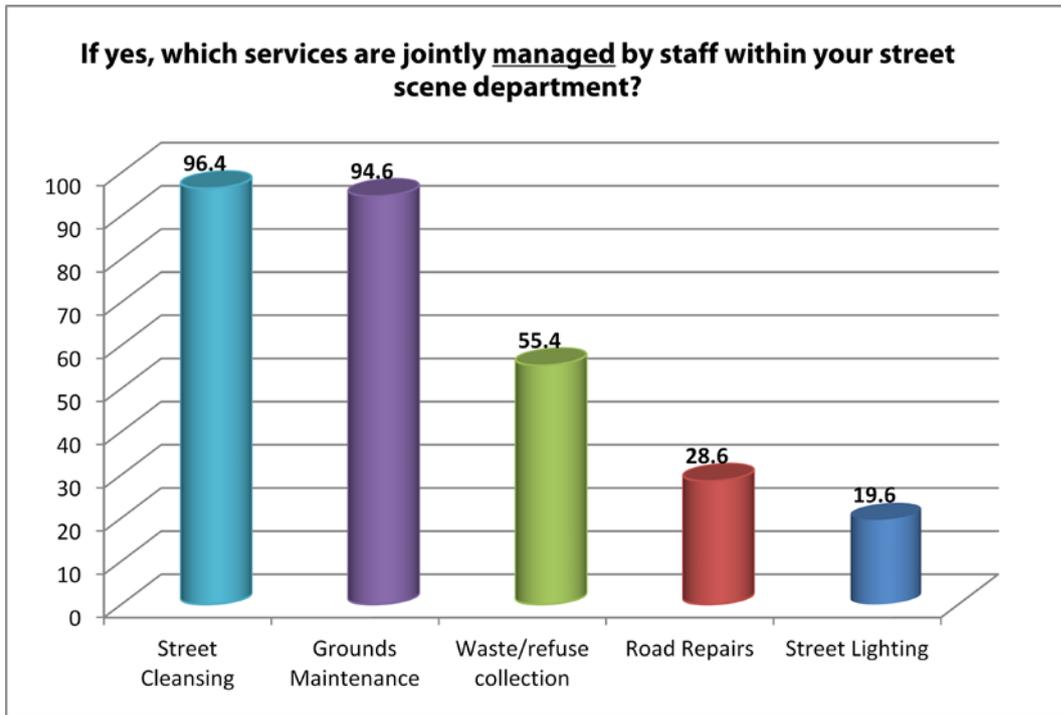
The survey asked how quality of parks was measures during 2012/13 and the results were as follows:



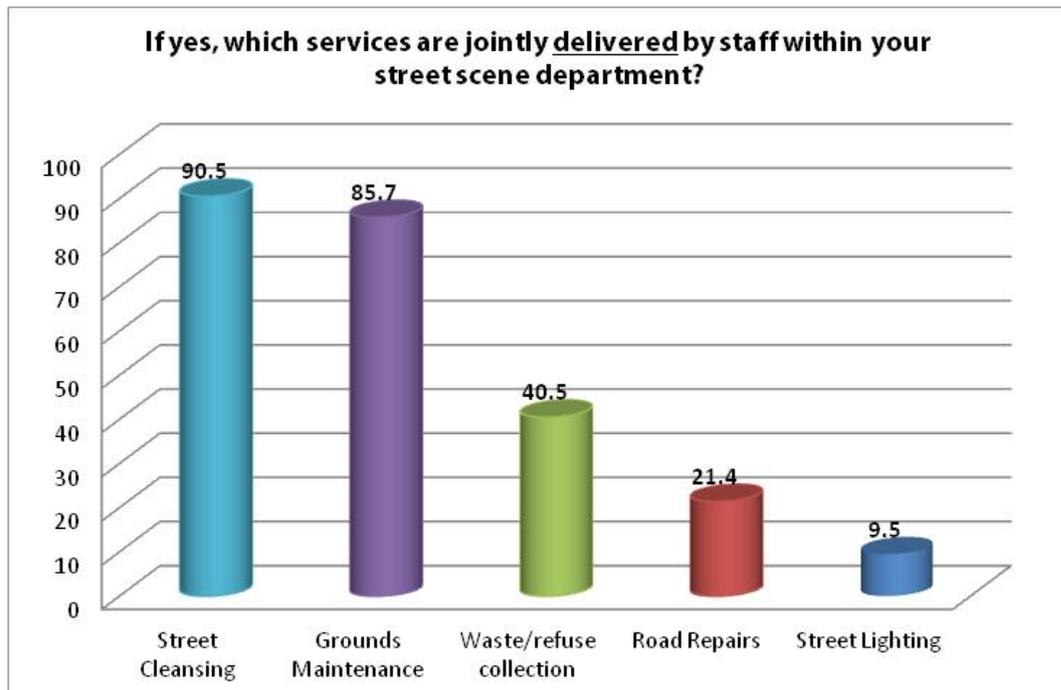
The use of green flag methodology either for selected parks or across the majority of parks as a quality measure has proportionally increased from 2012 responses. The same questions was asked in terms of how quality of parks is intended to be measured next year and there is a slight increase in the percentage of respondents saying they will do some form of quality measurement, with an increase in the use of locally development inspection surveys. It is encouraging that there is a continued commitment by local authorities to measuring the quality of the service being provided despite budget cuts. APSE believes that it is vitally important within the current economic climate for councils to continue to measure the quality of parks services for both managing the service effectively and to assess changes in service provision against other data such as the cost of service and customer satisfaction. APSE offers a performance benchmarking service for parks, horticulture and open spaces called [performance networks](#).

### **g) Street scene**

59.3% are already part of an integrated street scene service, a slight increase from last year, which involves the following services being jointly managed:



The survey also asked which services are jointly delivered by staff and the results were as follows:

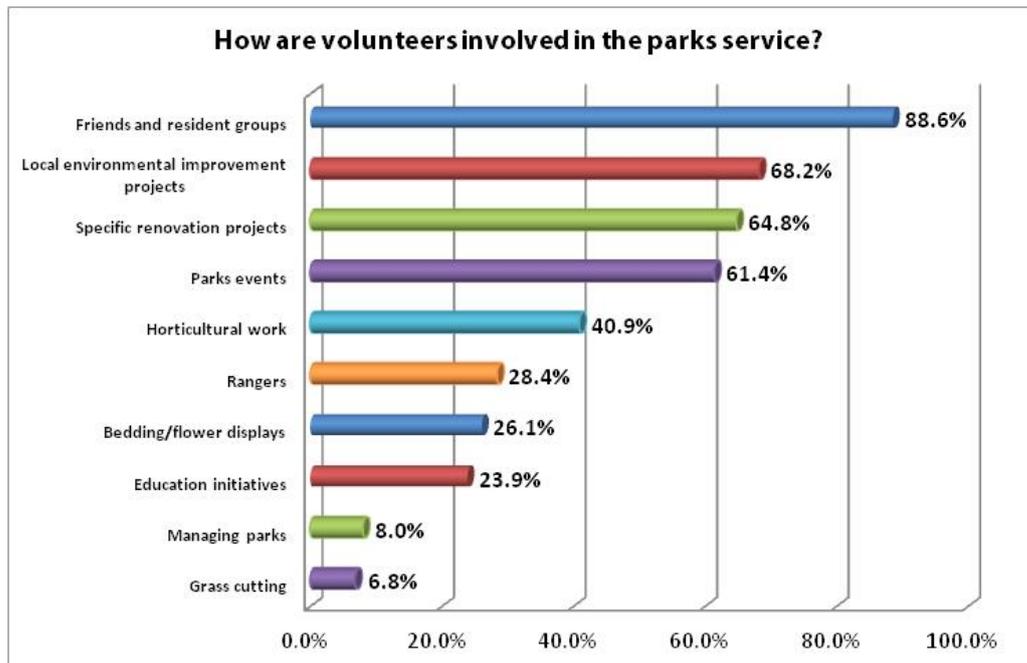


The largest areas of increase in the joint delivery of services since the 2012 survey, were in the joint delivery of waste/refuse collection and road repairs; an 8.7% and 7.8% increase respectively.

Out of those respondents who answered that they are not already part of an integrated street scene service, 26.8% expect to become part of one in the near future. This is a drop from the 43% response rate to this question when asked in 2012.

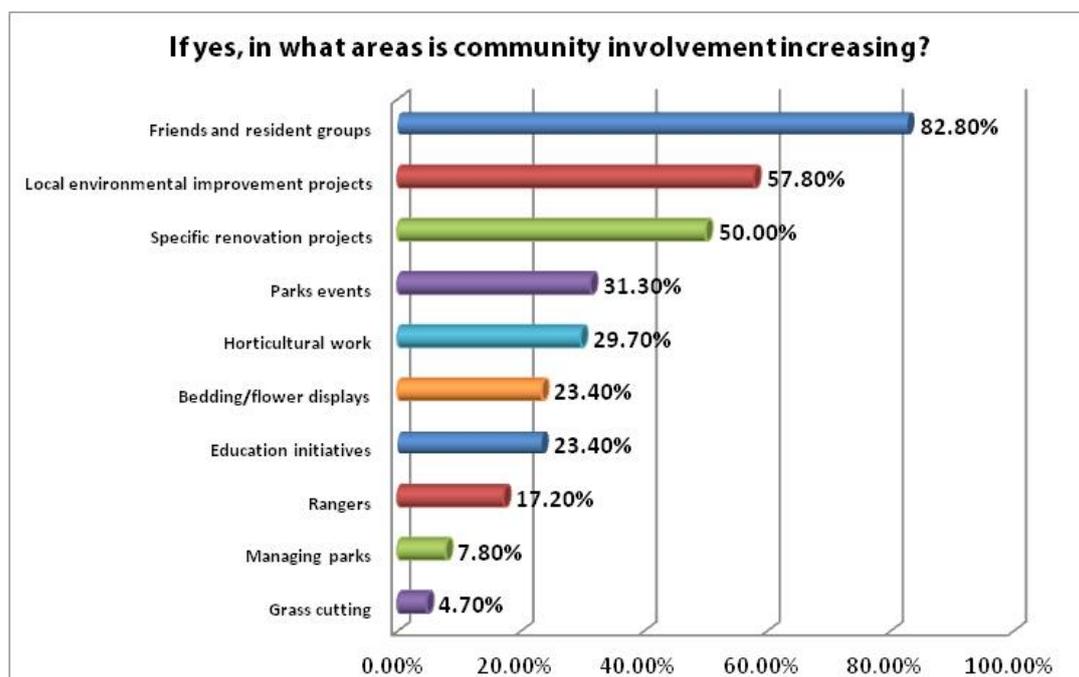
## h) Community and volunteer involvement

95.5% of respondents had friends of parks groups operating in their localities. The survey asked how volunteers are involved in the parks service and results were as follows:

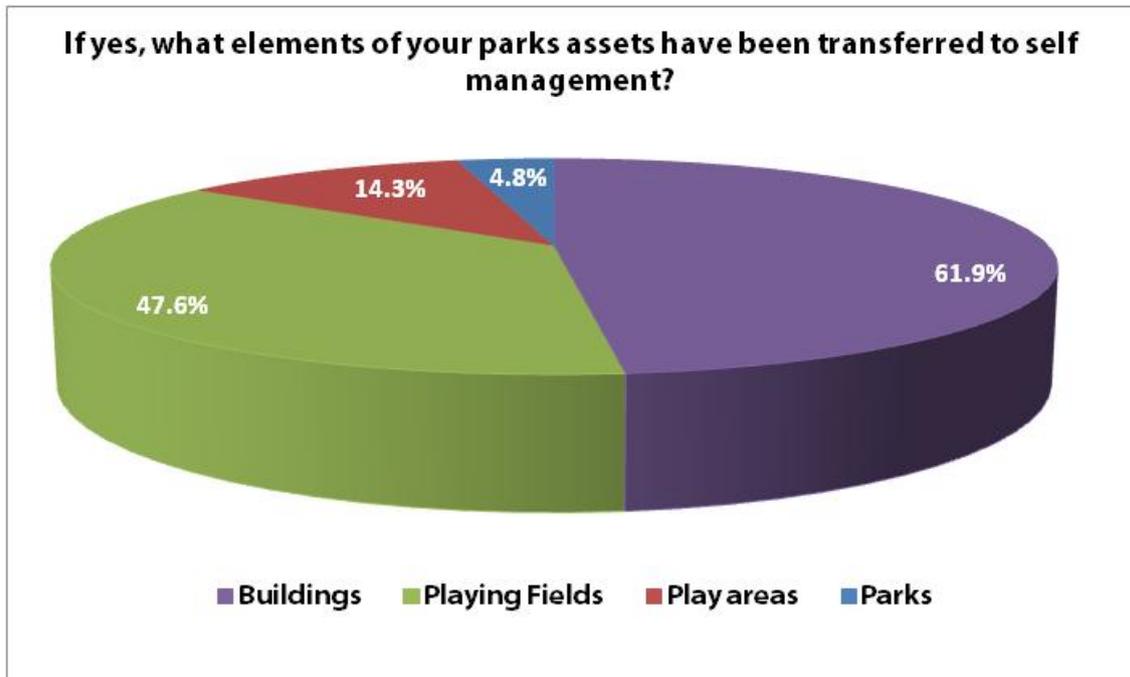


Similarly to last year, the results suggest that volunteers tend to be involved more in decision making forums (such as friends and residents groups) and specific projects rather than carrying out the actual maintenance or horticultural work. Having said this, the areas of biggest increase with regards to volunteer involvement compared to 2012 are in specific renovation projects, horticultural work and grass cutting. Areas which have seen a drop in volunteer involvement compared to 2012 survey results include local environmental improvement projects and education initiatives.

73.3% of respondents thought that the community sector involvement in parks is increasing (a 4.3% increase from last year). Areas that respondents thought community sector involvement was increasing included:



When asked 'during the past 2 years whether your council transferred any of its parks assets to self management', 27.3% answered yes- an increase of 10% compared to the 2012 survey response. Additionally, 23.9% answered that their council is looking at this option. Of those who answered yes, respondents stated the following elements as been transferred:



### 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:

<b>Where do you see growth for the service over the next 12 months?</b>	
<b>Answer options</b>	<b>Response Percent</b>
Community involvement/engagement	78.0%
Partnership working with other public bodies	57.3%
Offering a maintenance service to external organisations/private work	43.9%
Sharing services with other local authorities	40.2%
Capital projects (e.g. section 106)	37.8%
Events in parks	37.8%
Additional open space from housing developments	35.4%
Allotments/community gardens	31.7%
Conservation and management of climate change	28.0%
Children's play	22.0%
Training	8.5%
Nursery production	1.2%

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?**

<b>Answer options</b>	<b>Response Percent</b>
Reduced maintenance or frequency of maintenance of grounds	84.1%
Bedding, floral displays, regional shows, ornamental grass cutting, bowling greens, high amenity areas	84.1%
Reduction in service or standards	72.0%
New development projects/capital investment schemes e.g. play area refurbishment	42.7%
Transfer of assets	42.7%
Litter picking	35.4%
Fewer parks and facilities	28.0%
Landscaping and country parks	26.8%
Achievement in awards	26.8%
Sports provision	23.3%
Schools grounds maintenance	23.2%
Ranger service	23.2%
Other council department service level agreements e.g. education, housing and leisure	22.0%
Parks-specific community engagement	18.3%
Housing grass cutting contracts	17.1%
Inspection and maintenance of children's play areas	15.9%
Cemeteries and closed churchyards	14.6%
Maintenance work for town/parish councils	11.0%

## The Association for Public Service Excellence

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 authorities 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](mailto:enquiries@apse.org.uk).

Our national advisory groups include:-

- Building cleaning
- Catering
- Housing, construction and building maintenance
- Parks, horticultural and ground maintenance
- Renewables and climate change
- Roads, highways and street lighting
- Service delivery models
- Service transformation and performance management
- Sports and leisure management
- Vehicle maintenance and transport
- Waste management, refuse collection and street cleansing