



membership resources

State of the Market Survey 2016

Local Authority Parks and Green Spaces Services



**Briefing 16-15
April 2016**



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Local Authority Parks and Green Spaces Services State of the Market 2016

APSE conducted an online survey during December and February 2016. This follows on from the 2015, 2013, 2012, 2010 and 2008 Parks and Green Spaces State of the Market survey where similar questions were asked to allow for trend comparisons. These briefings can be accessed at the links below:

- [2015 results briefing](#)
- [2013 results briefing](#)
- [2012 results briefing](#)
- [2010 results briefing](#)
- [2008 results briefing](#)

64 responses were received from local authorities throughout the UK. This report identifies the key findings of the survey compared with previous findings.

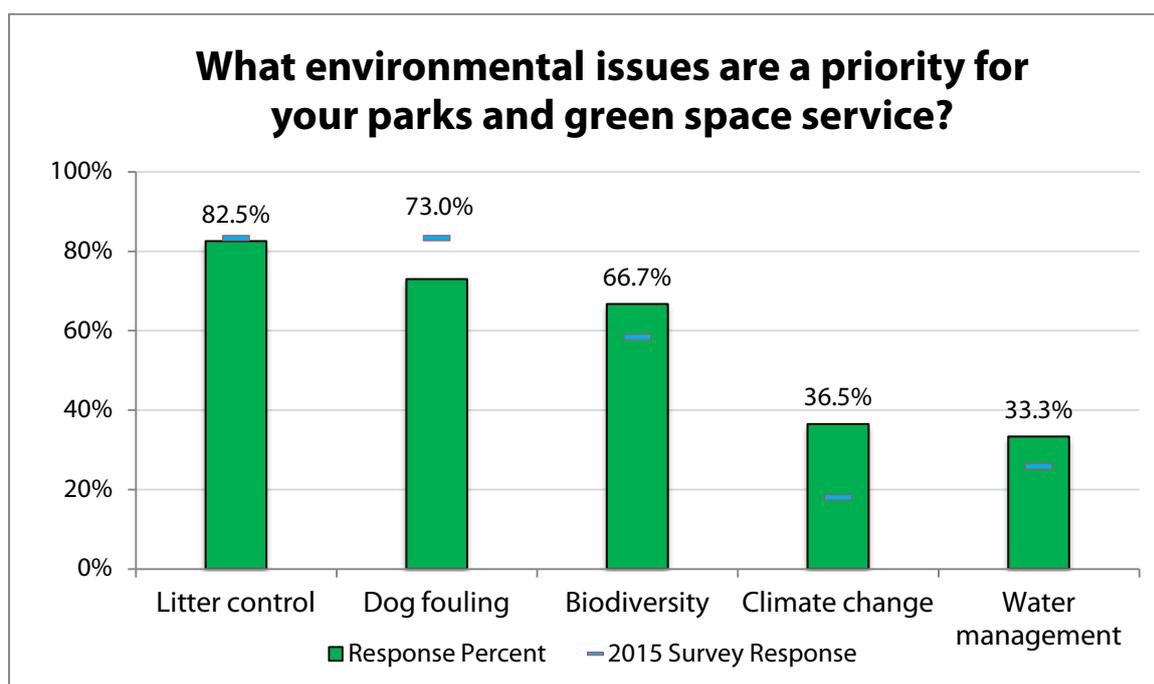
Results from the survey

a) Your opinions

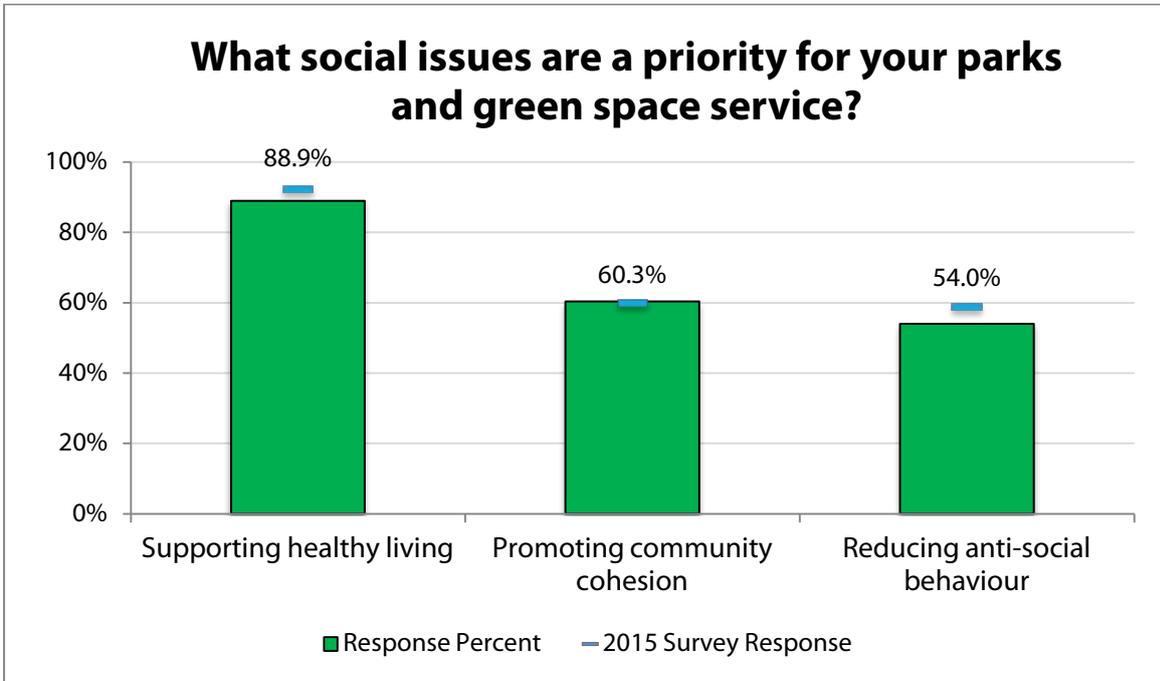
The table below shows the number of respondents who agree/disagree with the statements:

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	40.6%	37.5%	18.8%	0.0%	3.1%
Reductions in funding has resulted in a withdrawal of maintenance from some land and an increase in unmaintained land	35.9%	50.0%	12.5%	0.0%	1.6%
Lack of investment in parks and green spaces will have health and social impacts	68.8%	25.0%	4.7%	0.0%	1.6%
There is a clear link between parks/play provision and levels of crime/anti-social behaviour	42.2%	32.8%	6.3%	1.6%	17.2%
There's a limit to the extent to which volunteers can be involved in delivering parks and green space services	77.4%	14.5%	4.8%	3.2%	0.0%
The public should get free access to all parks	60.9%	26.6%	9.4%	3.1%	0.0%

78.1% either 'agree', or 'agree strongly' that 'the squeeze on public sector resources is affecting parks and green spaces disproportionately to other service areas, a rise of 3.3% since 2015's survey. 85.9% 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'. 93.8% either 'agree' or 'agree strongly' that the 'lack of investment in parks and green spaces will have health and social impacts'. 75.0% either 'agree' or 'agree strongly' that 'there is a clear link between parks/play provision and levels of crime/anti-social behaviour'. 91.9% 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', although 92.4% believe that community sector involvement in parks has either stayed the same or increased in the past year. 87.5% either 'agree' or 'agree strongly' that 'the public should get free access to all parks'.



The main environmental priority for parks and green space services remains 'litter control' (82.5%), with 'dog fouling' dropping by 11.3% to 73.0% this year. The importance of promoting biodiversity' rose by 8.3% (to 66.7%), and the value of parks as ameliorating the effects of climate change' rose by 18.5% (to 36.5%) and 'water management' regarding flood control, rose by 7.5% (to 33.3%). These increases are undoubtedly a reflection of the public's growing concern about declining biodiversity and the recent extreme weather conditions which were caused by climate change and resulted 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.

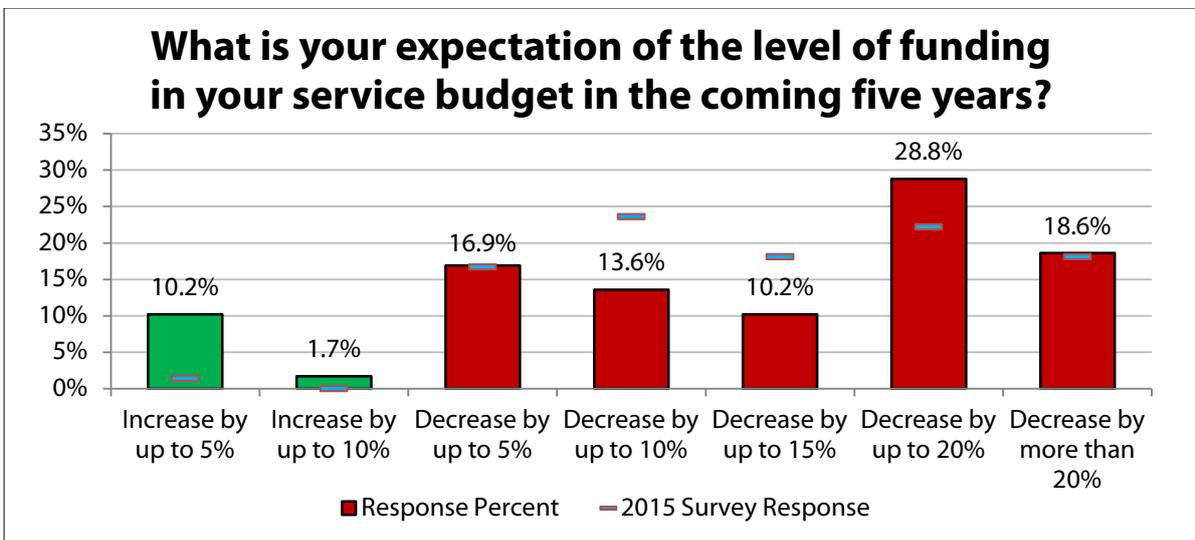


For the 2015 survey, we added a question on the social issues that are a priority for your parks and green space service. The most frequent response was ‘supporting healthy living’ (88.9%, down 3.3%), followed by ‘promoting community cohesion’ (60%, up 0.3%) and ‘reducing anti-social behaviour’ (54.0%, down 4.9%). Additional responses received included skills and employability and educating future generations on wildlife and habitats.

b) Budget expectations

The number of respondents who expect the parks and green space budget to change over the next year has remained constant since 2013 at roughly 83%. Of those who expected a change in the budget, 90.2% expect a decrease in revenue and 68.6% expect a decrease in capital. To meet efficiency pressures. In order to mitigate against these losses, 84.7% of respondents intend to increase fees and charges over the next 2-3 years (returning to similarly high levels in the 2012 survey).

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



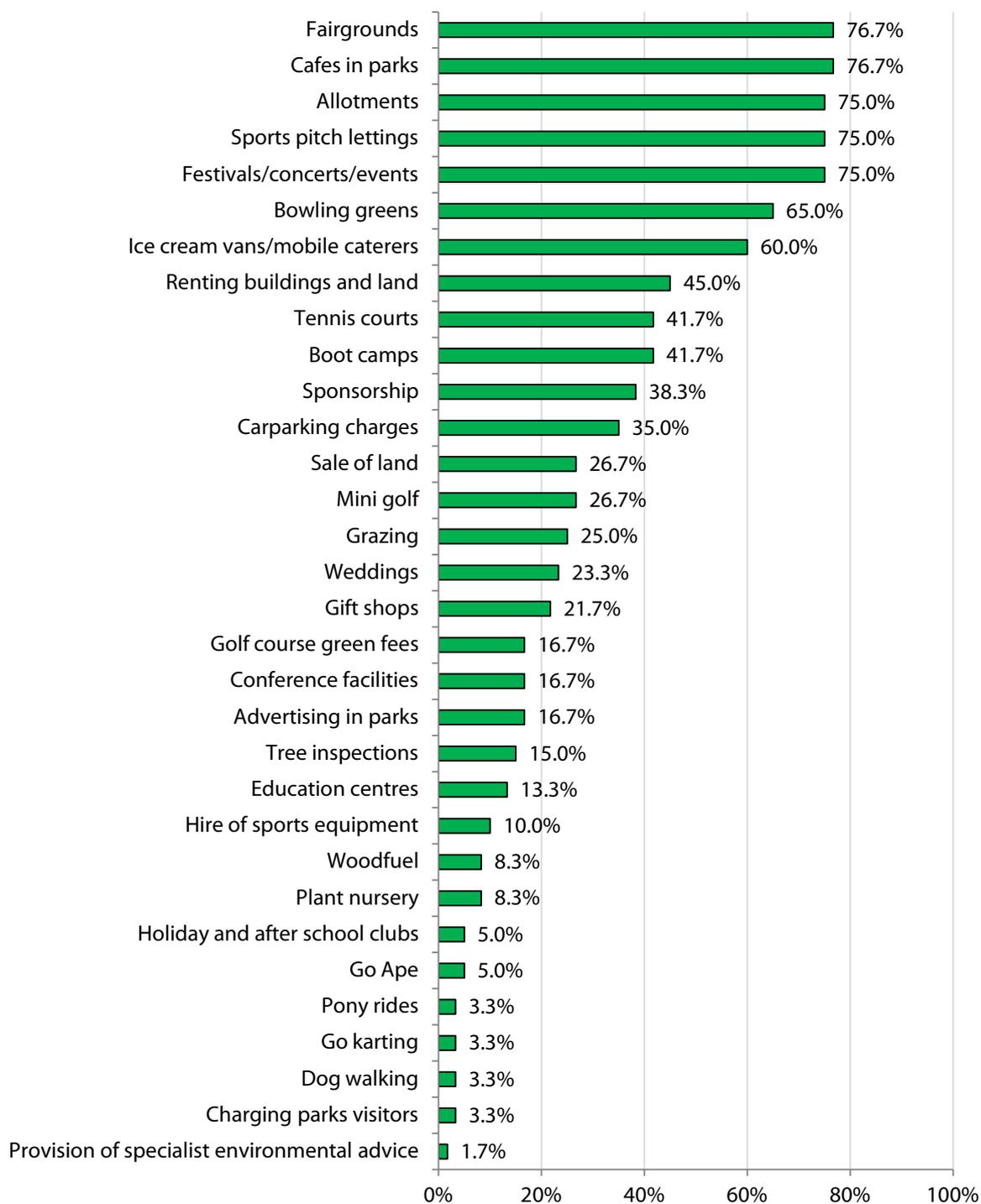
Respondents who answered 'decrease by more than 20%' expected a budget decrease from anywhere up to 50%. What is also noticeable is that whilst expected levels of 10-15% budget decreases have fallen against 2015 returns, those expecting budgets cuts of 20% and above has noticeably risen, which suggest harder cuts are now being placed upon parks than was previously expected.

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

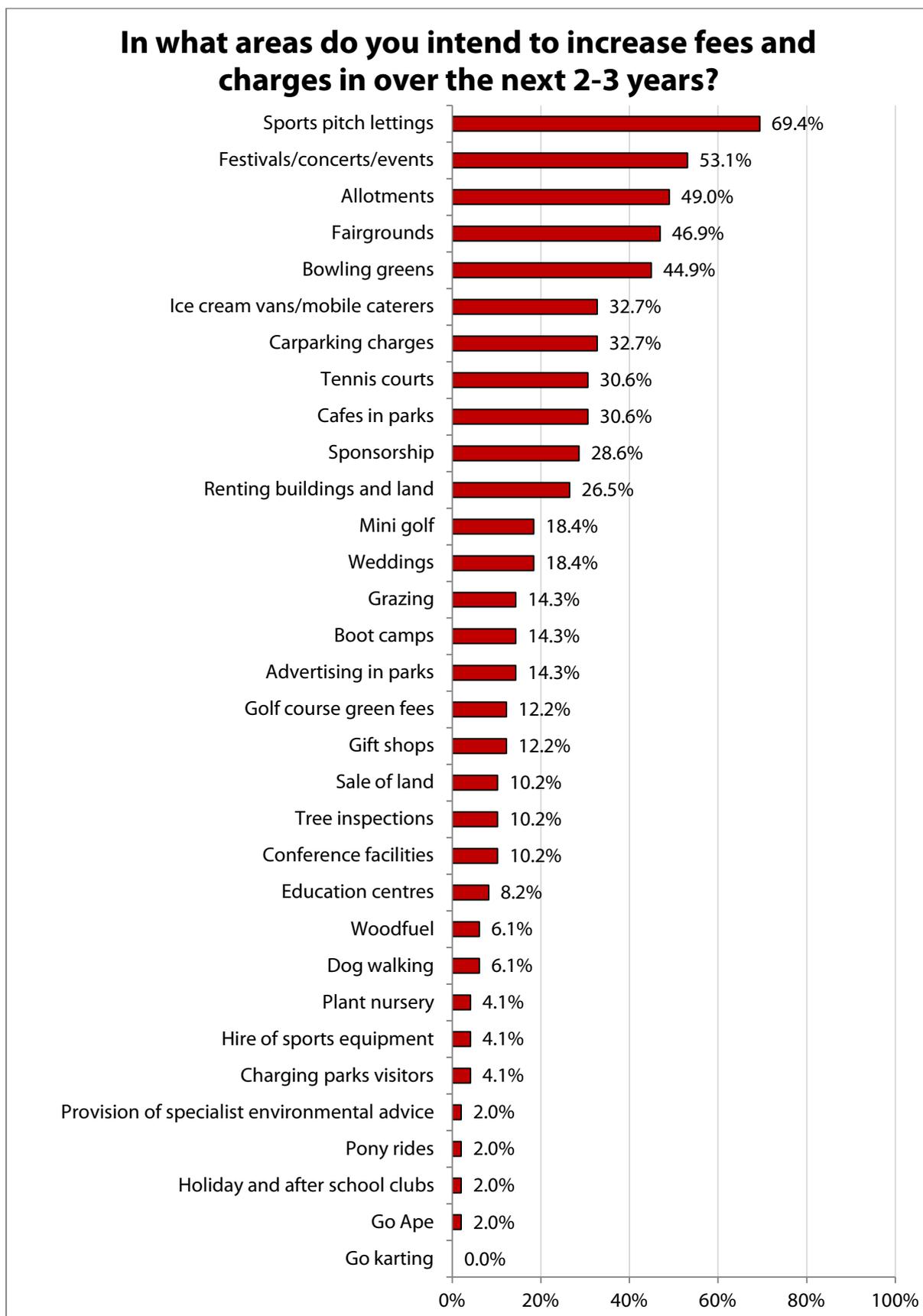
- Rethinking staffing levels through reducing management tiers, cutting administrative staff, reducing IT/communications systems updates, introducing larger seasonal staffing to replace core workforce, increasing volunteering opportunities, introducing role flexibility)
- Commercialisation of operations
- 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 provision)

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:



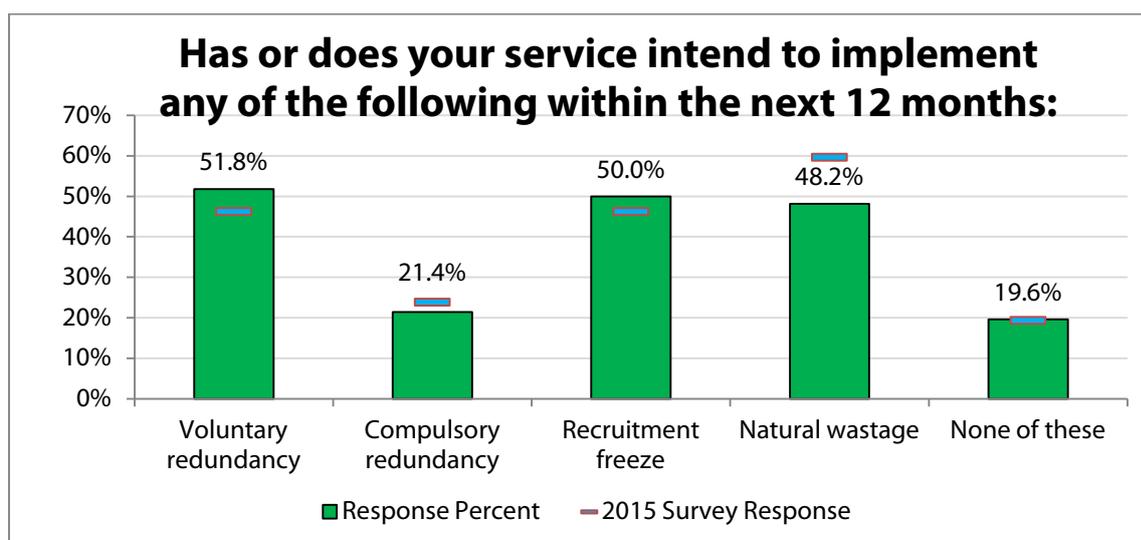
Respondents identified several barriers to generating income , these included: 61.4% cited 'competing priorities (e.g. budget cuts)' down 11.7% from 2015), 'a lack of time' (45.6%, down 5.1%), 'experience of staff in bringing in new income' (43.9%, down 13.4% - suggesting staff are getting better at raising income), 'political resistance' (35.1%, down 11.2% - suggesting politicians are now more willing to see local authority service adopting a more commercial approach), 'public resistance' (33.3%, up 1.0%) and 'lack of investment funding' (29.8%, down 12.0%). 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' (87.9%). Worryingly there has been a continued drop in local authorities receiving income from external sources these include the 'National Lottery Heritage Fund' (53.4%, down 13.6% compared to 2013). The number of respondents receiving income 'through friends of parks groups' has also fallen (51.7%, down 11.2% since 2015), as has 'grant funding from other trusts' (46.6%, down 12.0%). 'Sponsorship' was received by 36.2% of respondents (down 4.9%), and the figures for other types of funding was also lower than last year 'health funding' (25.9%), 'sale of assets (e.g. timber)' (22.4%, down 9.0%) and private funding (10.3%, down 4.0%).

Respondents were asked whether they sold their services outside of the Local Authority. 33.9% currently sell services to the 'private sector', a slight increase since 2013/2015. 27.1% currently sell services to 'other local authorities', 23.7% sell to 'other public sector bodies'. 47.5% of respondents indicated that their local authority does not sell their services to any of the above.

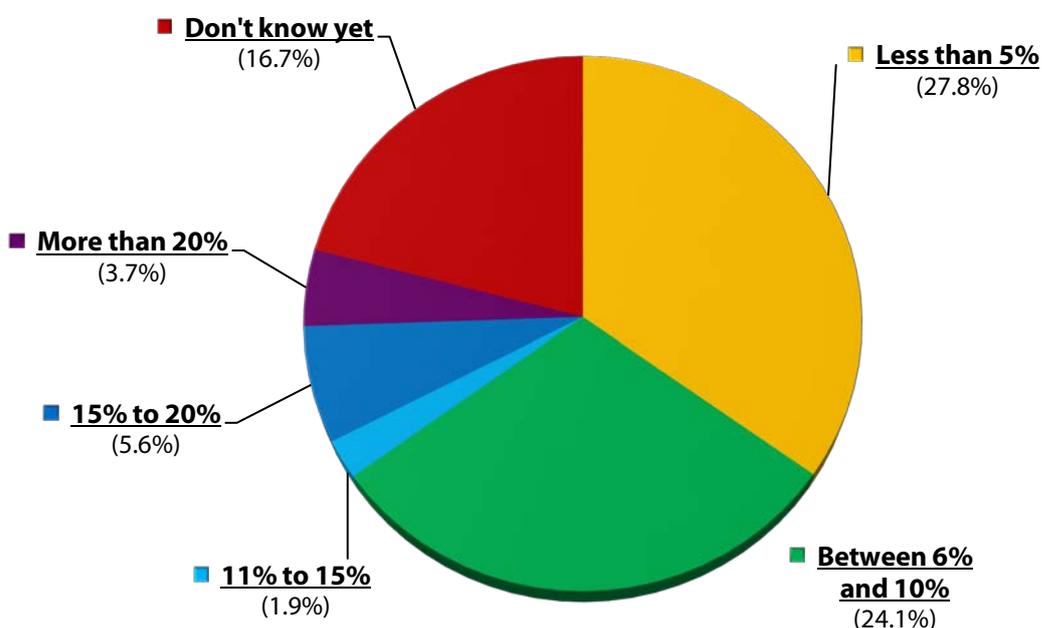
c) Staffing

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:



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:

If your service area is subject to workforce reductions, what percentage of staff do you expect to lose from the service?



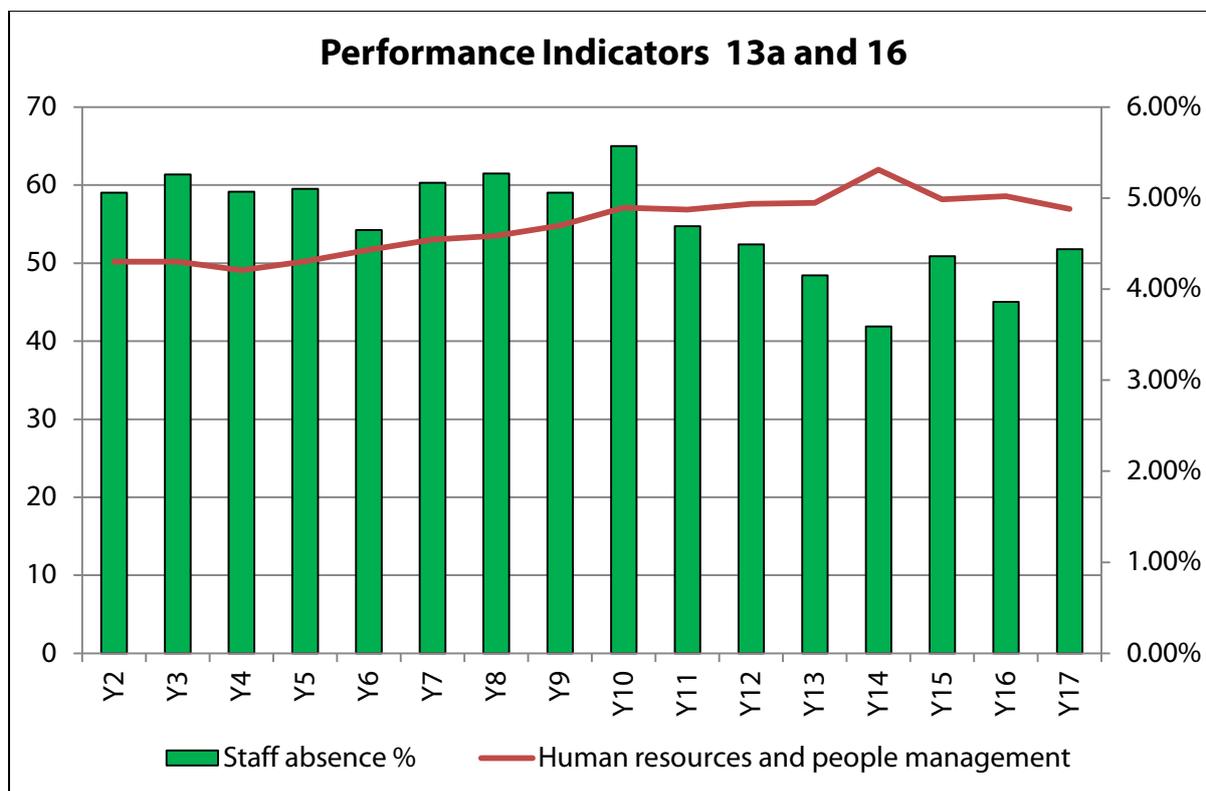
27.8% of respondents expected to lose 'less than 5%' of their workforce, 24.1% expected to lose 'between 6% and 10%', 1.9% expected to lose between '11% and 15%', 5.6% expected to lose between '15% and 20%', 3.7% expected to lose 'more than 20%' and 16.7% 'don't know yet'. The outlook of respondents has generally improved since 2015's survey with a greater certainty of the number of staff they expected to lose and a noticeable decline in those expecting to lose more than 10%.

Are staff absence levels at an acceptable level?	
Too high	16.9%
Slightly above average	16.9%
About average	25.4%
Slightly below average	22.0%
Very low	18.6%

There has been a continued drop in respondents reporting staff absence levels as about average (25.4%, down 3.8% since 2015 and down 16.2% since 2013). 33.8% reported absence levels as being either 'too high' or 'slightly above average' while 40.6% reported absence levels as being 'very low' or 'slightly below average'. Estimated staff absence

levels were reported as 'zero absence' (1.8%), 'under 5%' (52.7%), 'under 10%' (36.4%), 'under 20%' (7.3%) and 'under 30%' (1.8%).

APSE's benchmarking service Performance Networks has shown that staff absence is now standing at 4.44% (up 0.45% since 2015) for Year 17, which is well below the recorded high of 5.57% in Year 10. The average performance score in human resources and people management also fell to 56.95 (down 1.61 since 2015). The following chart has been extracted from APSE Performance Networks data collected between Years 2 and 17 using PI 13a – Percentage staff absence and PI 16 – Human resources and people management.



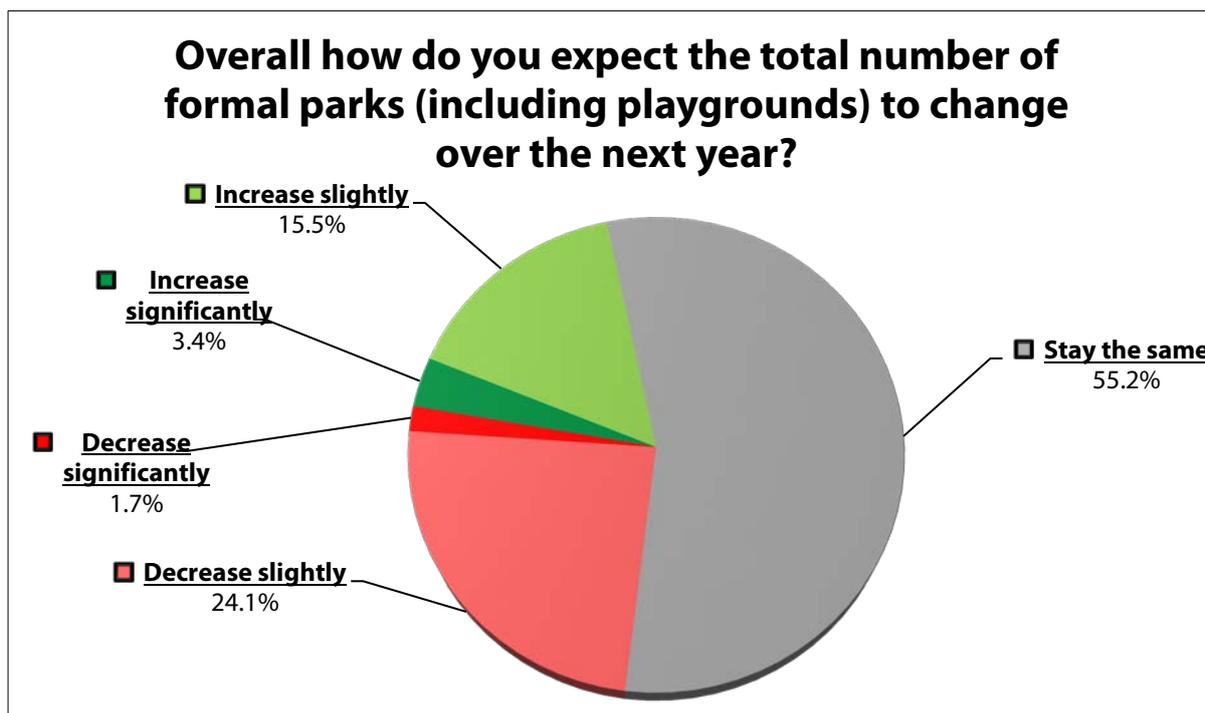
In terms of training, 67.8% thought that the training budget will stay the same over the next 12 months and 32.2% thought that it was going to decrease.

50.8% of respondents stated that they currently have apprentices and 38.2% are planning to recruit apprentices 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.

d) Numbers of parks and visitor numbers

The State of the Market survey has tracked the change in response since 2008 to the question 'Overall how do you expect the total number of parks (including playgrounds) to change over the next year?' 55.2% of respondents expected the total number to stay the

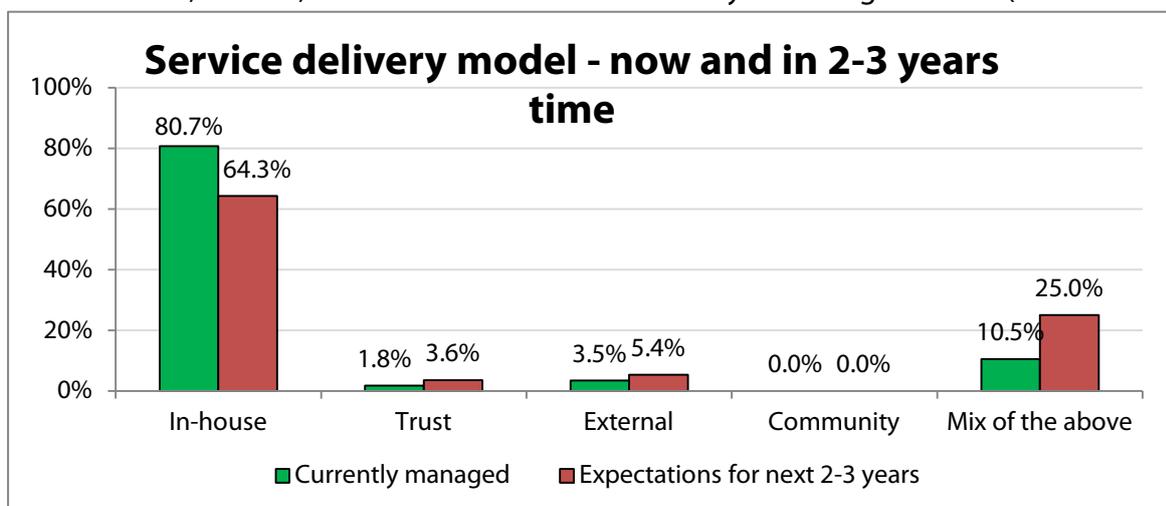
same, with 25.8% expecting a slight or significant decrease and the remaining 18.9% expecting a slight or significant increase over the next year.



When asked about the number of visitors to formal parks during the past year, 55.2% believed numbers had stayed the same, 41.4% believed they had increased (down 18.3%) and 3.4% believed they had decreased (up 1.9%), although only 39.7% of respondents monitor visitor numbers (up 12.8%) through a mixture of footfall/visitor/gate monitors, car monitors/car park payment monitors, audits and visitor surveys.

e) Service delivery

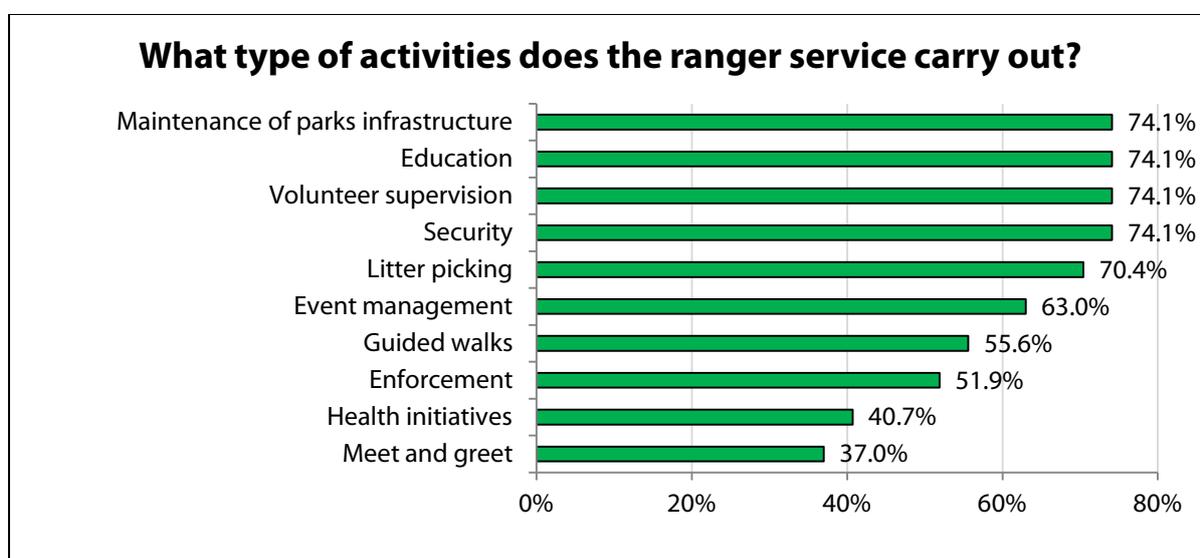
Whilst 80.7% of respondents currently have in-house services (down 6.9%), only 64.3% expect to be managed in-house in the next 2-3 years (up 7.4%). When asked how respondents expected the service to be managed in the near future, 25.0% expected a mix of in-house, trust, external and community management (down 5.8%).



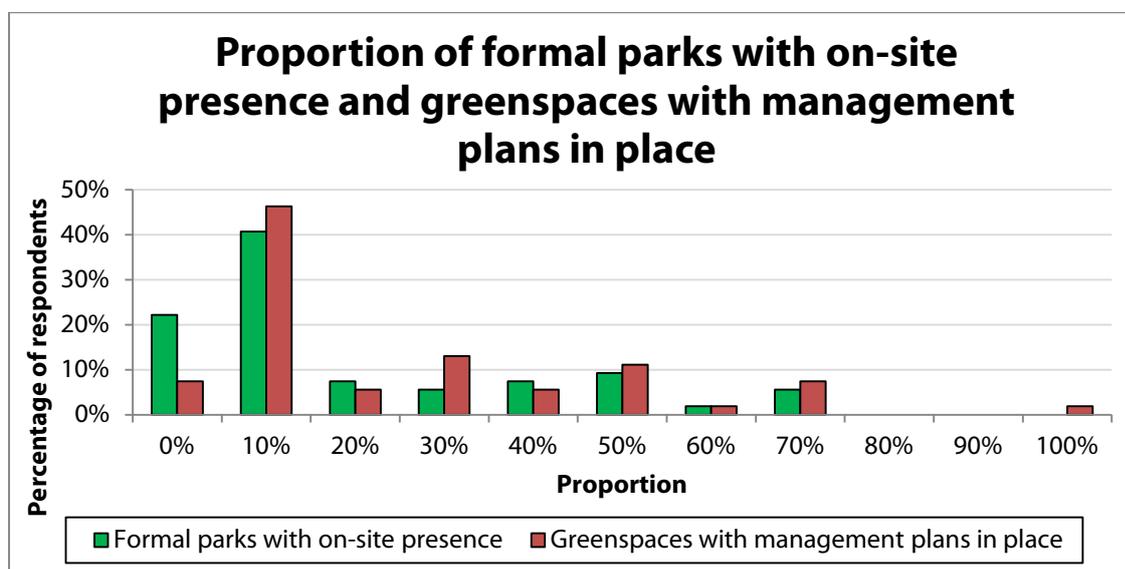
The bullet points below provide a useful summary of what is being delivered within the parks service and how it is being delivered according to those who responded to the survey:

- 59.3% have dog control orders in parks and green spaces and 57.4% have on the spot fines for litter/flytipping; 24.1% have none of the above
- 74.5% use seasonal labour (up 5.7%). Of those who have seasonal labour, on average 25.6% of their workforce are employed on these terms (up 1.6%)
- 61.4% have annualised hours (down 2.7%). Of those who have annualised hours, on average 73.4% of their workforce are employed on these terms

49.1% reported having parks rangers (up 8.5%), although 82.8% 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:

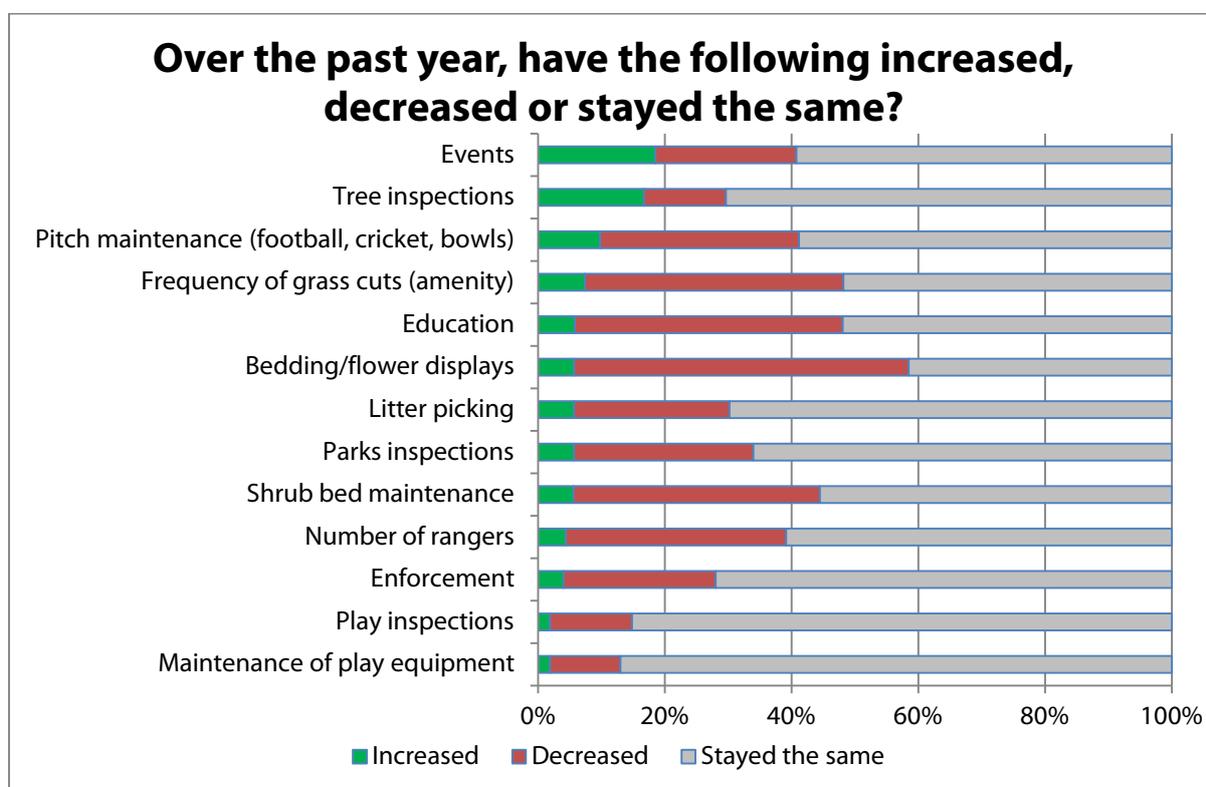


When asked about the proportion of formal parks which have an on-site presence and the proportion of greenspaces that have management plans in place, respondents answered:



f) 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:

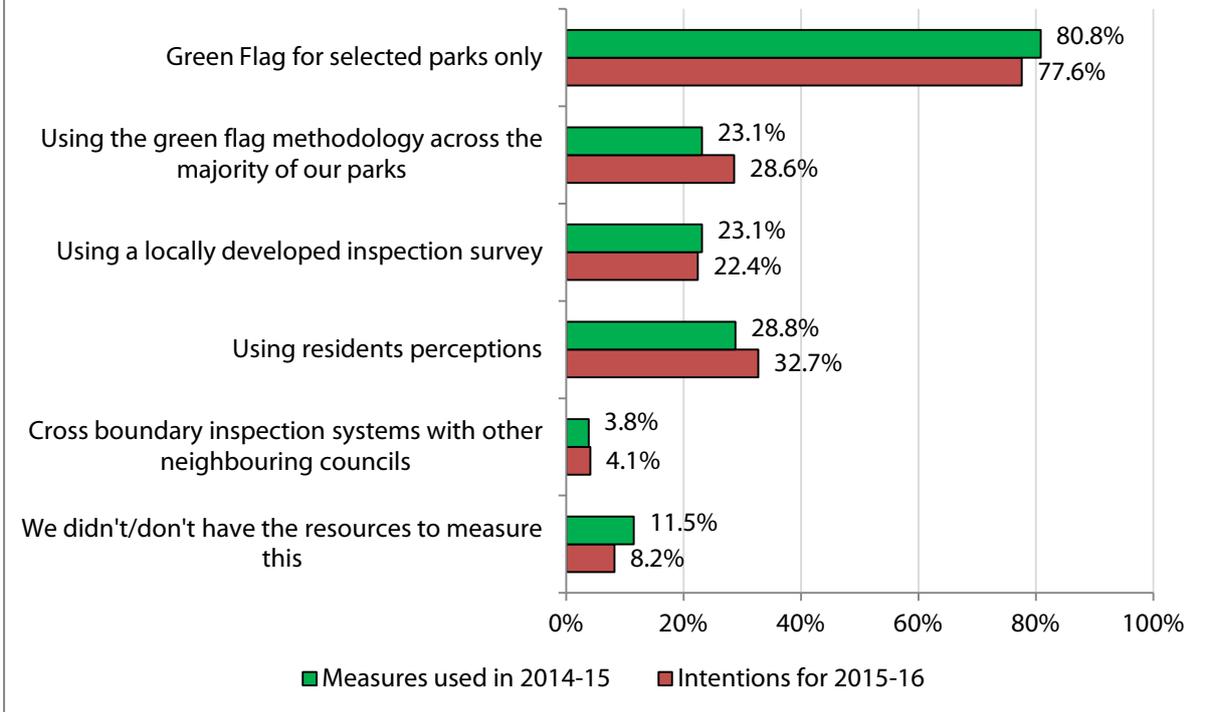


The main areas of increase were events (18.5%), tree inspections (16.7%) and pitch maintenance (9.8%). The main areas of decrease were bedding/flower displays (52.8%), education (42.3%), frequency of grass cuts (amenity – 40.7%), shrub bed maintenance (38.9%) and number of rangers (34.8%). Over 80% of respondents stated that their maintenance of play equipment (87.0%) and their play inspections (85.2%) stayed the same.

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 13 cuts, with 31.9% stating 10 cuts or less, 46.8% stating 11-15 cuts, 12.8% stating 16-20 cuts and 8.5% stating 21 cuts or more. 10.0% used Cylinder machines for estate and highways grass cuts, 28.0% used Rotary, 2.0% used Flail and 60.0% 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 2015-16 and the results were as follows:

How did you measure the quality of parks during 2014-15 and how do you intend to measure this in 2015-16?

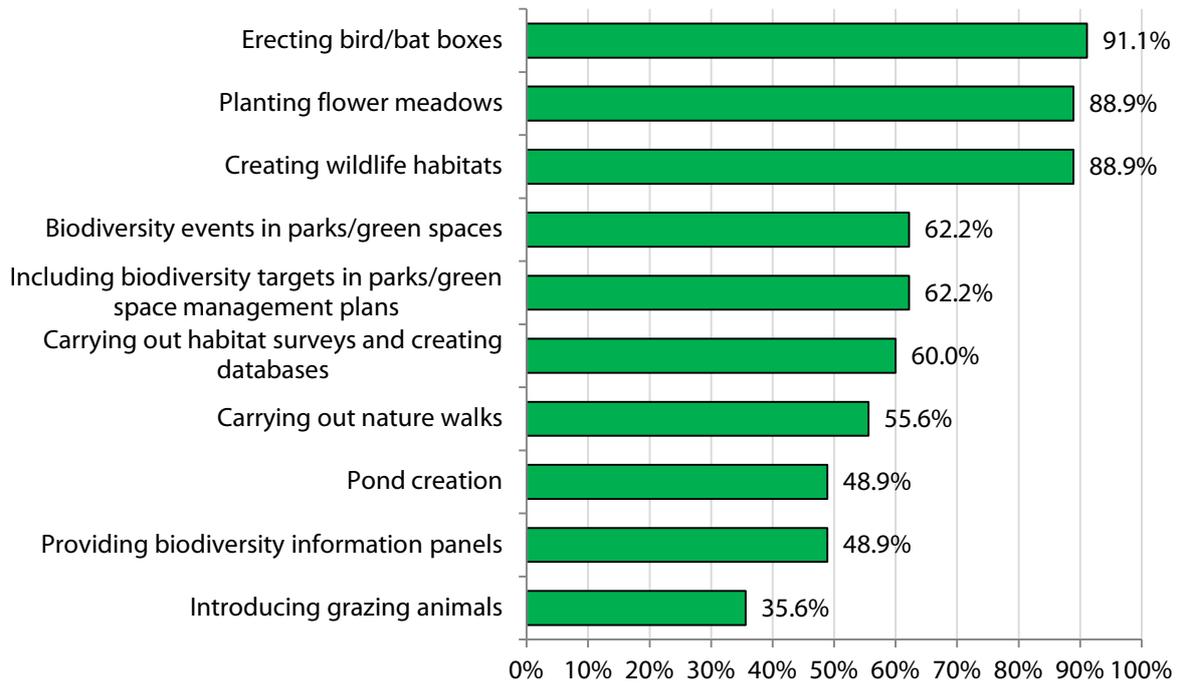


Respondents intentions for 2015-16 saw a slight drop in 'Green Flag for selected parks only' (3.2%) although there was a slight increase in 'using the green flag methodology across the majority of our parks' (5.5%). Slight falls also occurred in 'using a locally developed inspection survey' (0.7%) and 'we don't have the resources to measure this' (3.3%). Fewer respondents intend to use 'residents perceptions' (3.9%) and 'cross boundary inspection systems with other neighbouring councils' (0.3%). 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 against similarly sized authorities.

g) Biodiversity

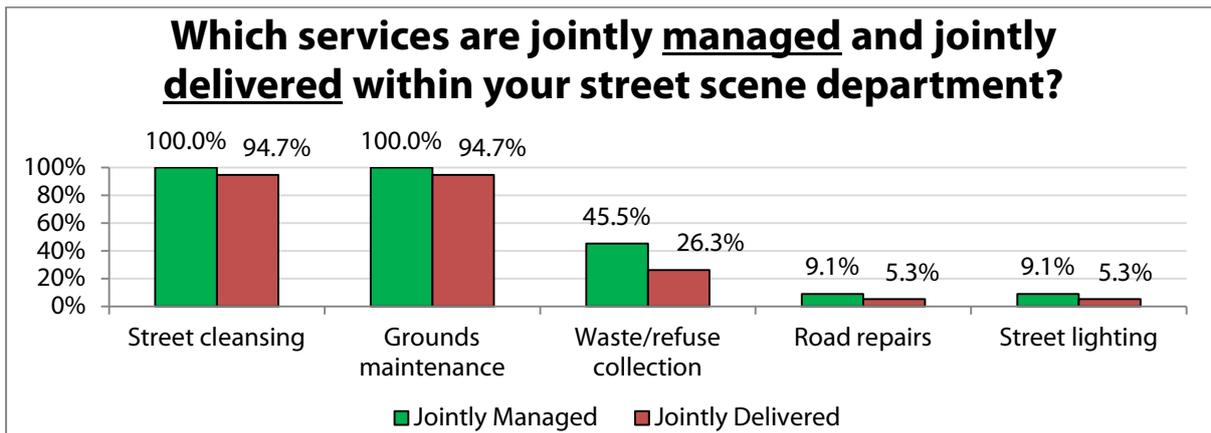
76.9% of respondents make a specific provision for promoting biodiversity in parks and green spaces. Of those that make specific provisions, the respondents have carried out the following:

If you make a specific provision for the promotion of biodiversity, which of the following have you carried out?



h) Integrated street scene services

42.6% of respondents are already part of an integrated street scene service (a decrease from last year's 53.2%) which involves the following services being jointly managed or delivered:

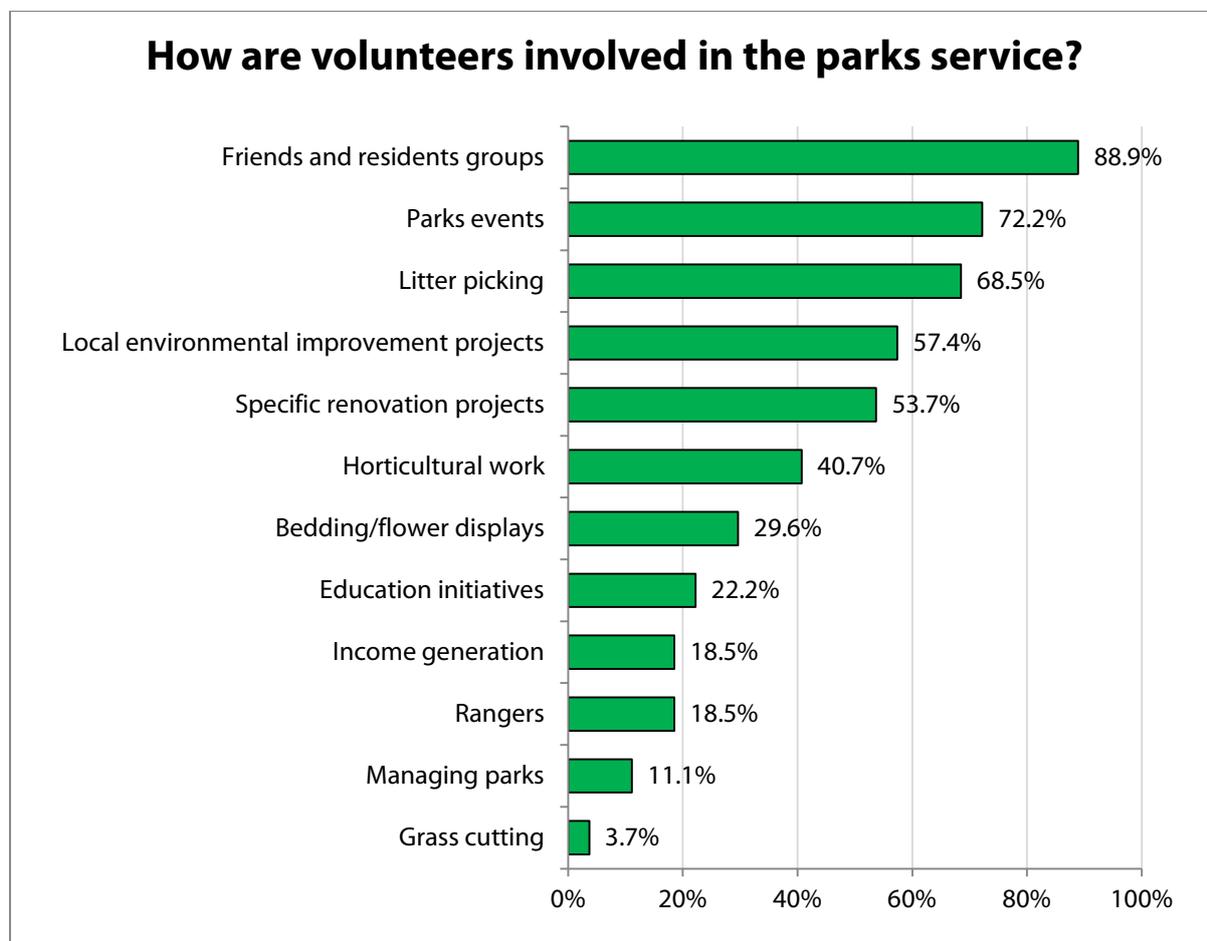


The largest areas of decrease in the joint delivery of services have continued to be in road repairs (28.6 % in 2013); the management of street lighting has also fallen (19.6 % in 2013).

Out of the respondents who answered that they are not already part of an integrated street scene service, 25.0% expect to become part of an integrated service in the near future (a drop from 38.2% in 2015).

i) Community and volunteer involvement

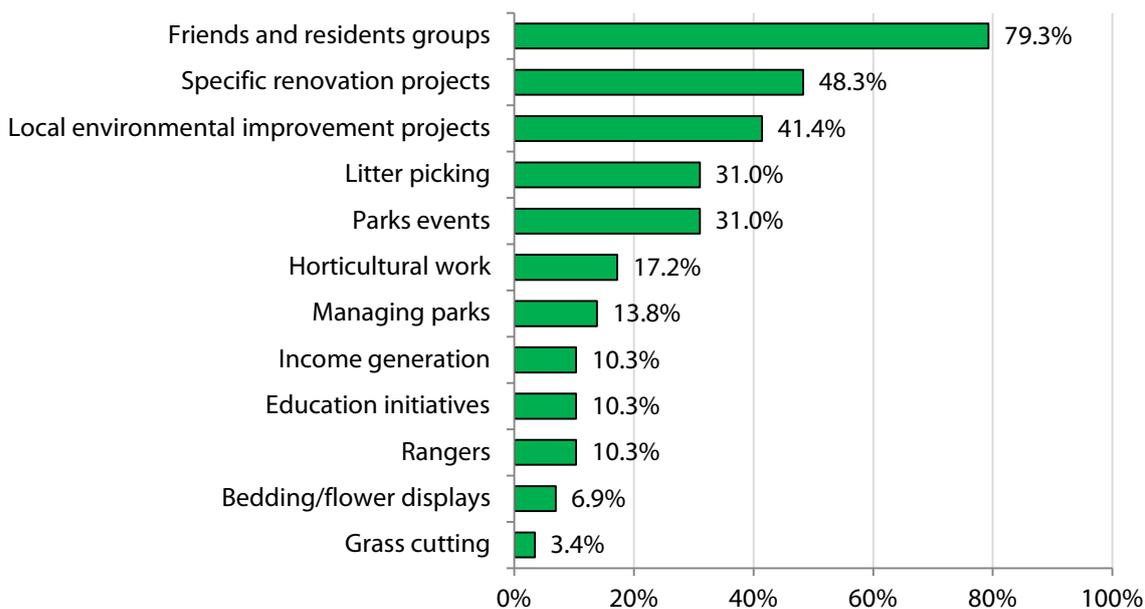
98.1% of respondents had friends of parks groups operating in their localities. The survey asked how volunteers are involved in the parks service and results were as follows:



The results show that volunteers tend to be involved more in friends and residents groups (88.9%) and specific projects like parks events (72.2%). There has been a rise in the number of volunteers involved in litter picking (68.5%, up 20.1%), education initiatives (22.2%, up 6.1%) and managing parks (11.1%, up 6.3%).

50.9% of respondents thought that community sector involvement in parks is increasing either slightly or significantly in the following areas:

In what areas is community sector involvement increasing?



When asked 'during the past 2 years whether your council transferred any of its parks assets to community management/ownership', 27.8% said yes and 29.6% said their council is looking at this. Respondents stated that the following elements had been transferred to community ownership:

What elements have been transferred to community management/ownership?	
Playing fields	64.3%
Buildings	57.1%
Allotments	28.6%
Play areas	14.3%
Parks	0.0%

j) 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:

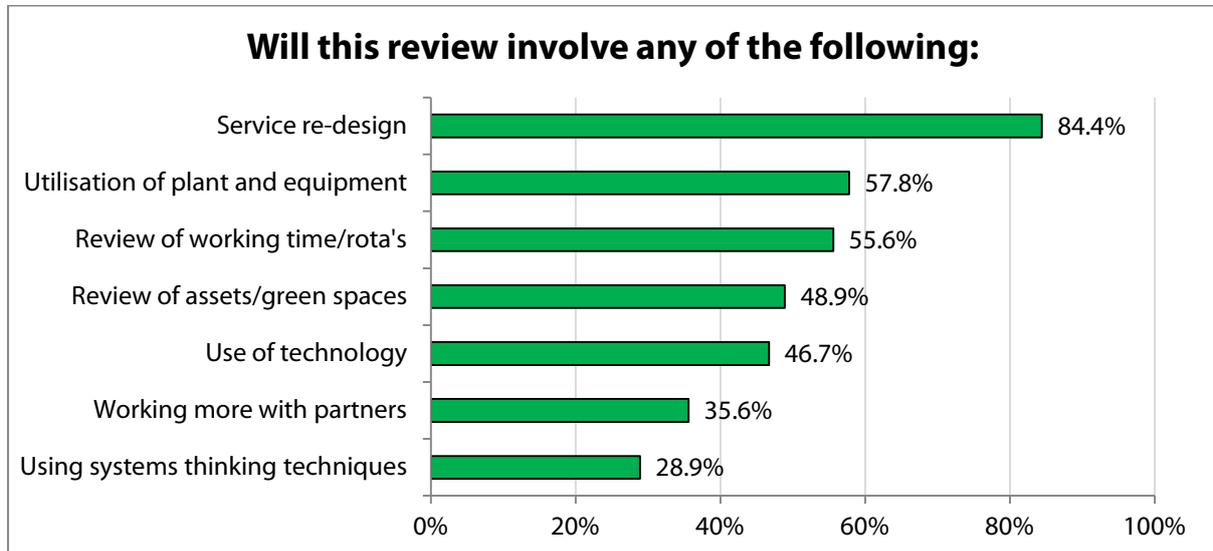
Where do you see growth for the service over the next 12 months?	
Community involvement/engagement	71.2%
Partnership working with other public bodies	65.4%
Sharing services with other local authorities	40.4%
Events in parks	34.6%
Offering a maintenance service to external organisations/private work	30.8%
Additional open space from housing developments	28.8%
Allotments/community gardens	25.0%
Capital projects (e.g. section 106)	21.2%
Offering a maintenance service to other local authorities	19.2%
Children's play	15.4%
Conservation and management of climate change	13.5%
Training	9.6%
Nursery production	1.9%

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?	
Reduced maintenance or frequency of maintenance of grounds	76.0%
Bedding, floral displays, regional shows, ornamental grass cutting, bowling greens, high amenity areas	74.0%
Reduction in service or standards	70.0%
Transfer of assets	40.0%
Sports provision	36.0%
Parks development activity	36.0%
Fewer parks and facilities	34.0%
Litter picking	32.0%
New development projects/capital investment schemes e.g. play area refurbishment	28.0%
Ranger service	28.0%
Landscaping and country parks	26.0%
Achievement in awards	26.0%
Housing grass cutting contracts	18.0%
Other council department service level agreements e.g. education, housing and leisure	16.0%
Cemeteries and closed churchyards	14.0%
Parks-specific community engagement	14.0%
Schools grounds maintenance	12.0%
Maintenance work for town/parish councils	10.0%
Inspection and maintenance of children's play areas	10.0%

k) Service reviews

41.5% of respondents had recently completed a service review, 34.0% were currently underway and 17.0% plan to do so in the next 1-2 years. According to respondents, these service reviews will involve the following:



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