



APSE State of the Market – Cemeteries and Crematorium Services 2018

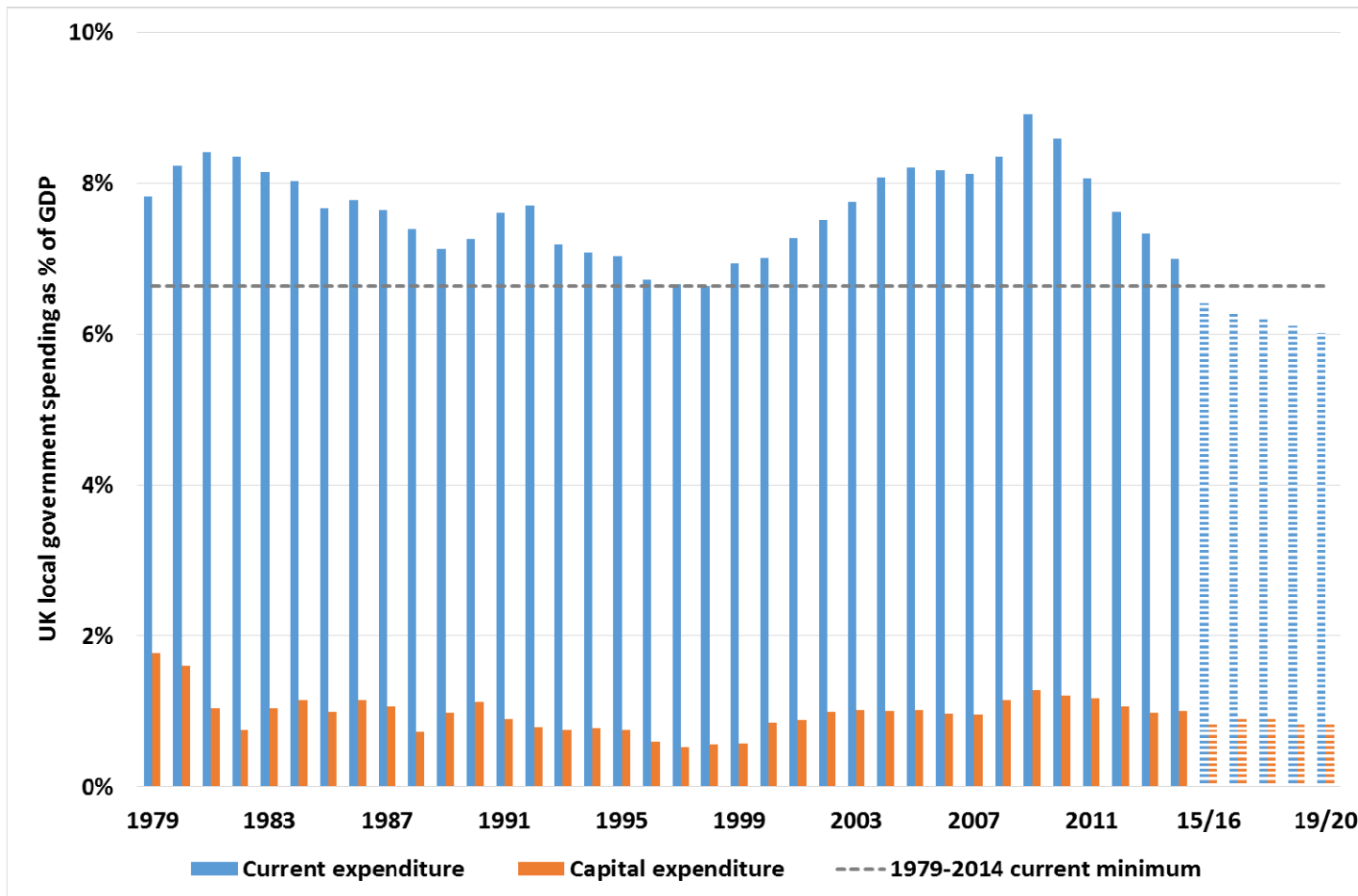
Paul O'Brien,
Chief Executive, APSE

Slide 1

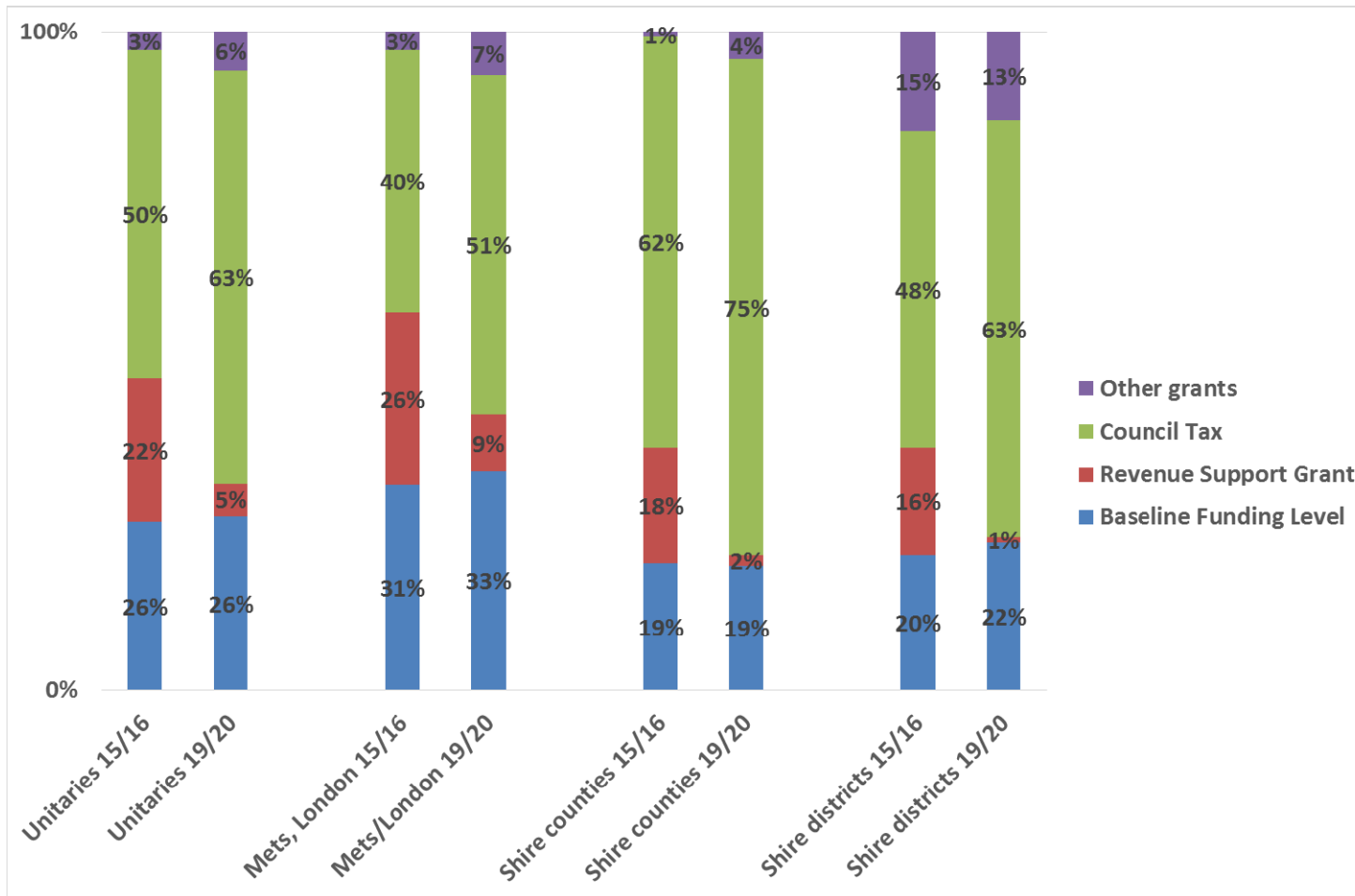
WP1

Wayne Priestley, 12/03/2018

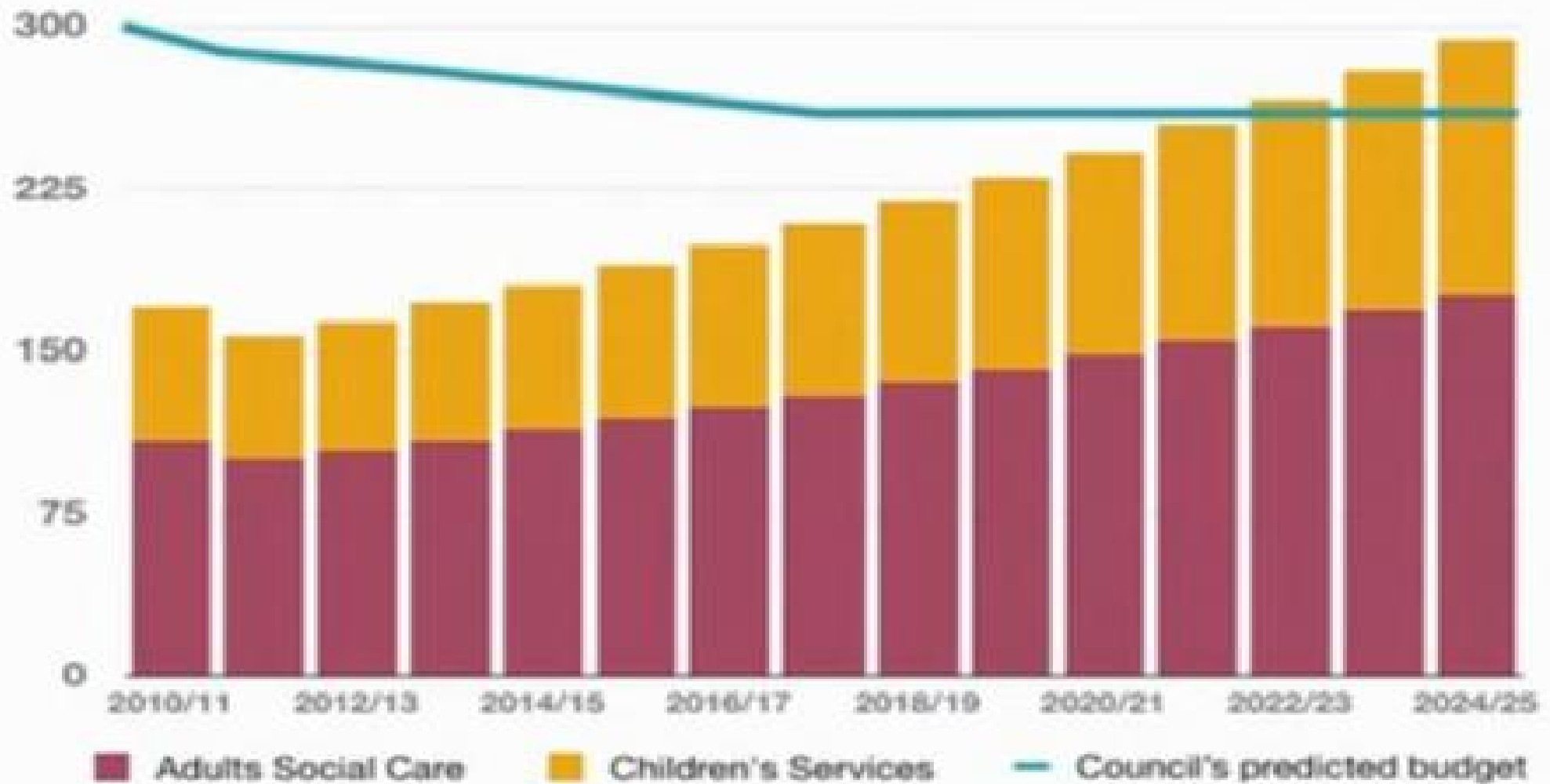
UK local government spending as a share of GDP: current spending, already below the 1979-2014 minimum, is projected to go on falling to 2020



Balance of core spending power 15/16 and 19/20: as RSG shrivels beyond London and the Mets, most LA funding will come from council tax



The 'Graph of Doom'

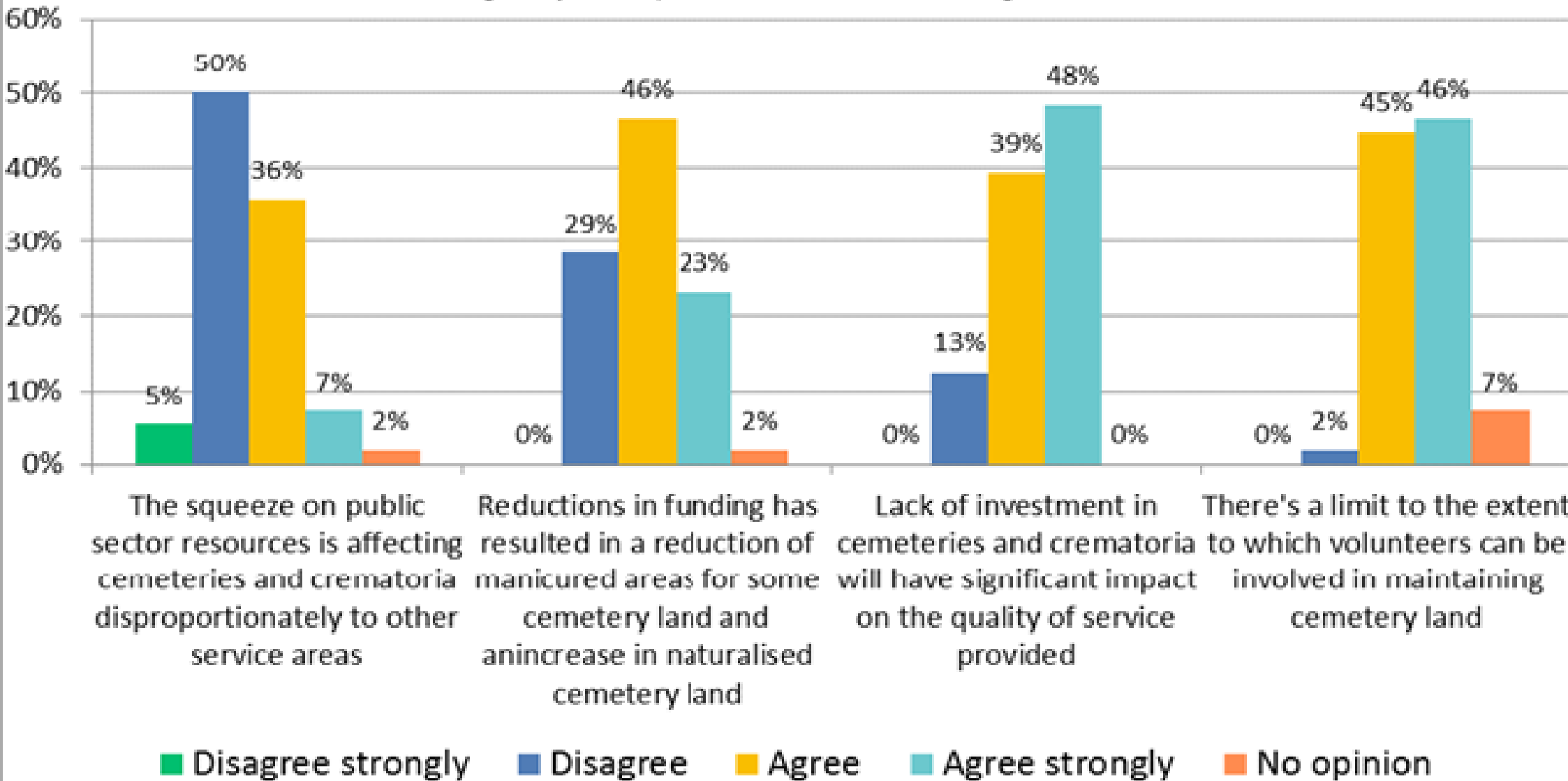


What has happened to Cemeteries and Crematorium services?

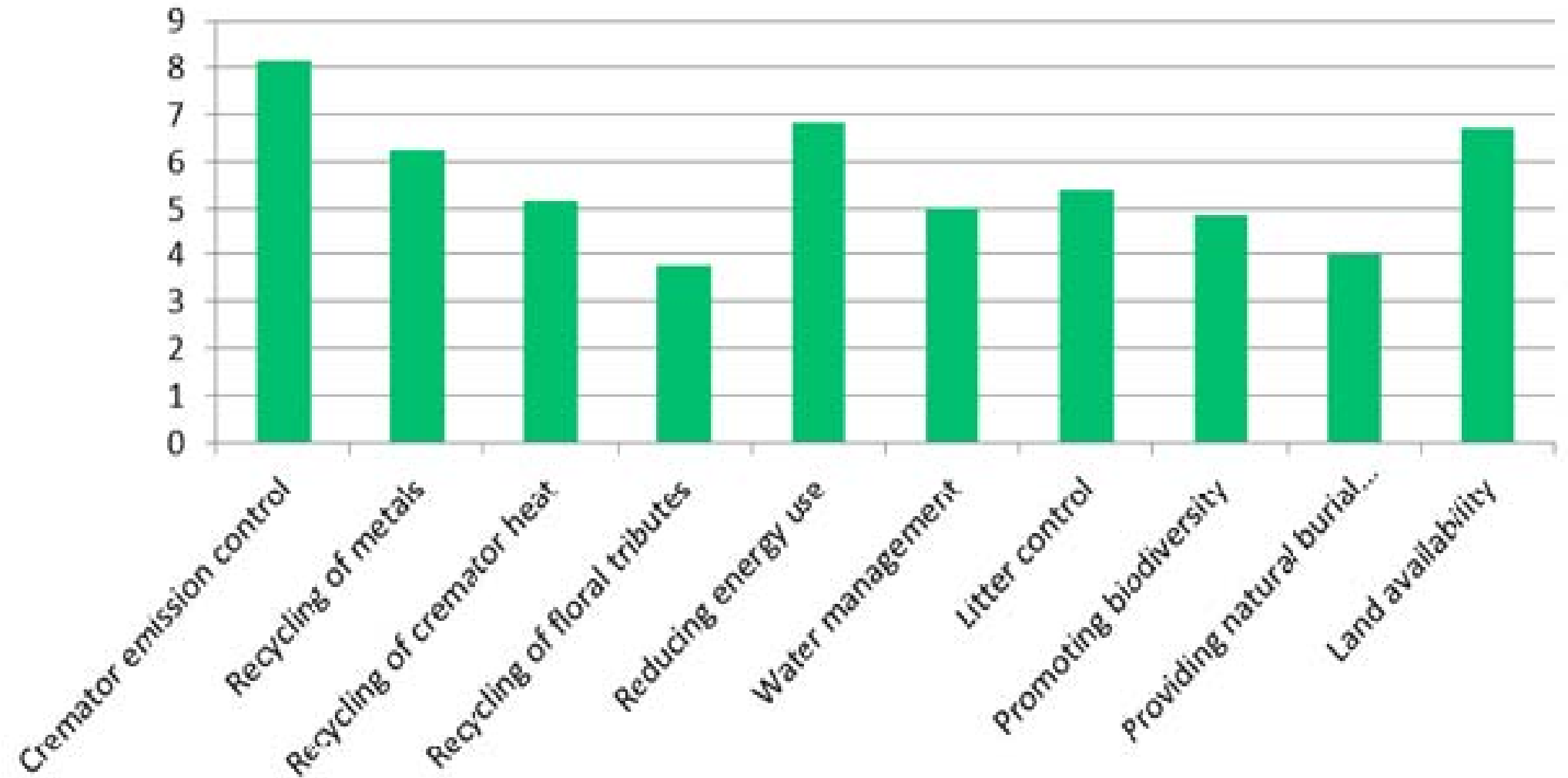


- Neighbourhood grouping
- Total service expenditure %'s in UK
- Average cuts v's areas of deprivation
- Parks £1B
- Average cut 21% to 30%
- Wales phenomenon
- APSE state of the market

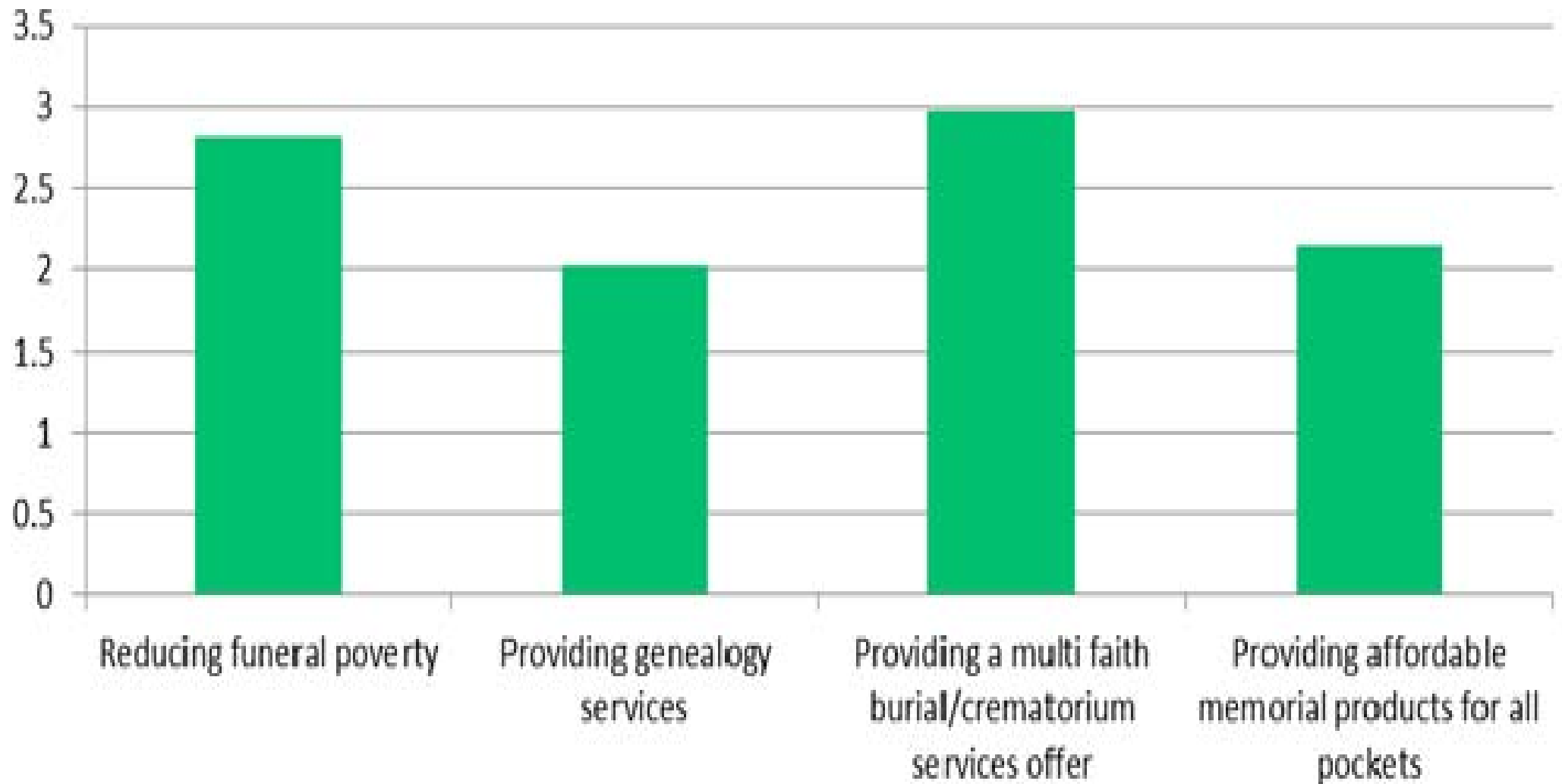
Please give your opinion on the following statements



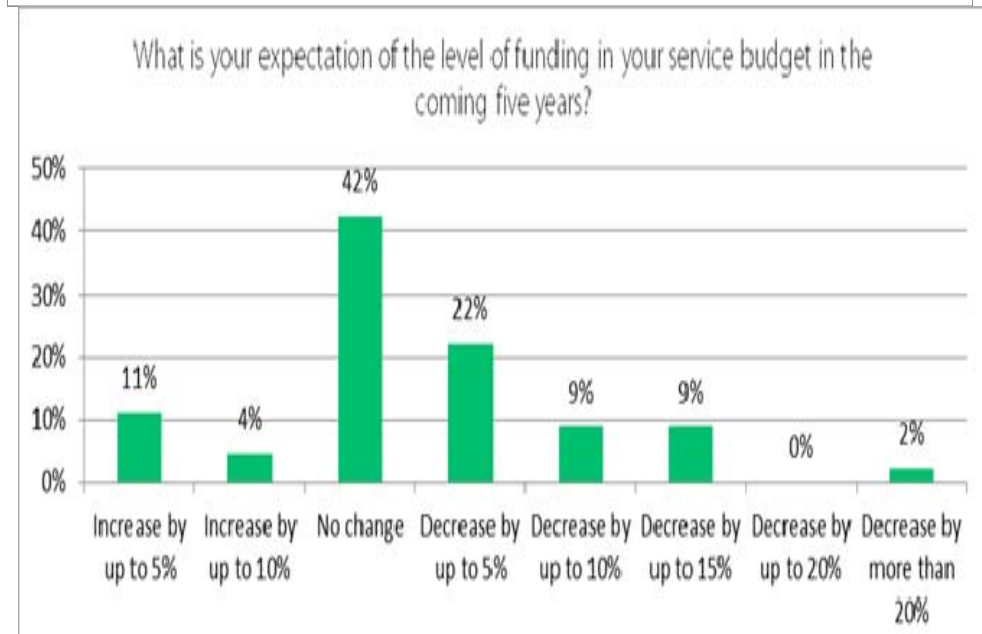
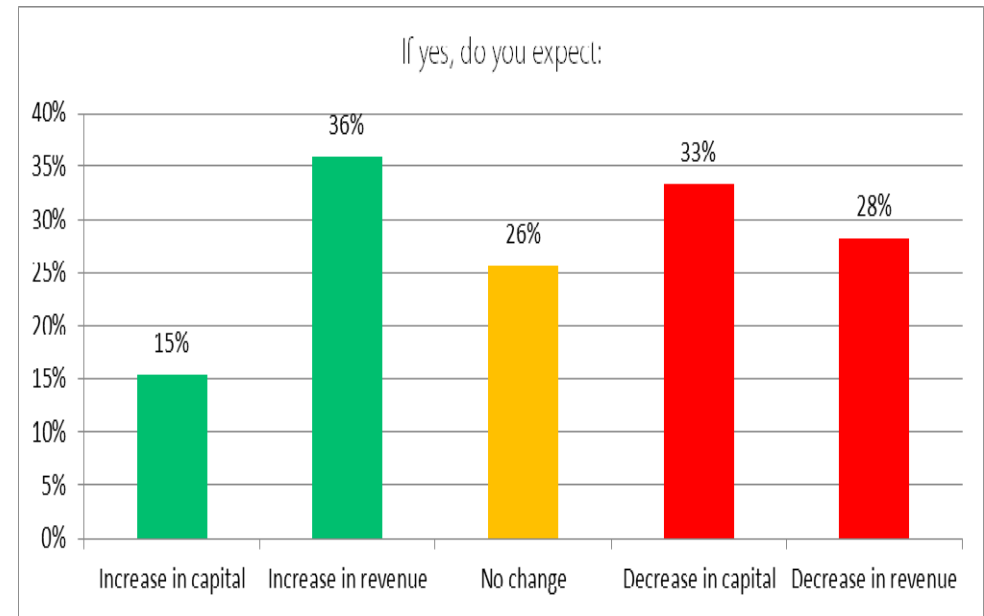
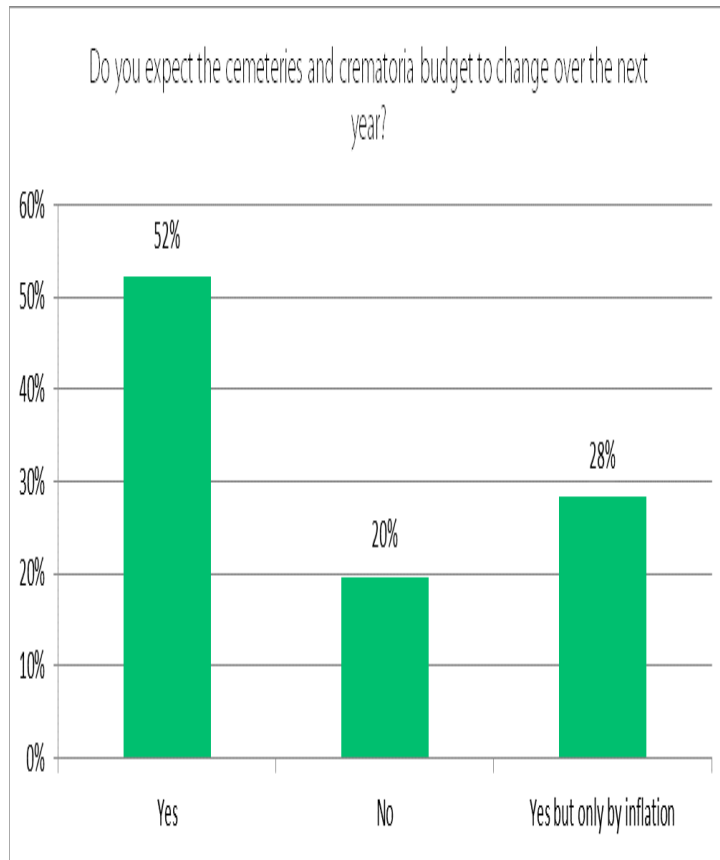
What environmental issues are a priority for your cemeteries and crematoria?



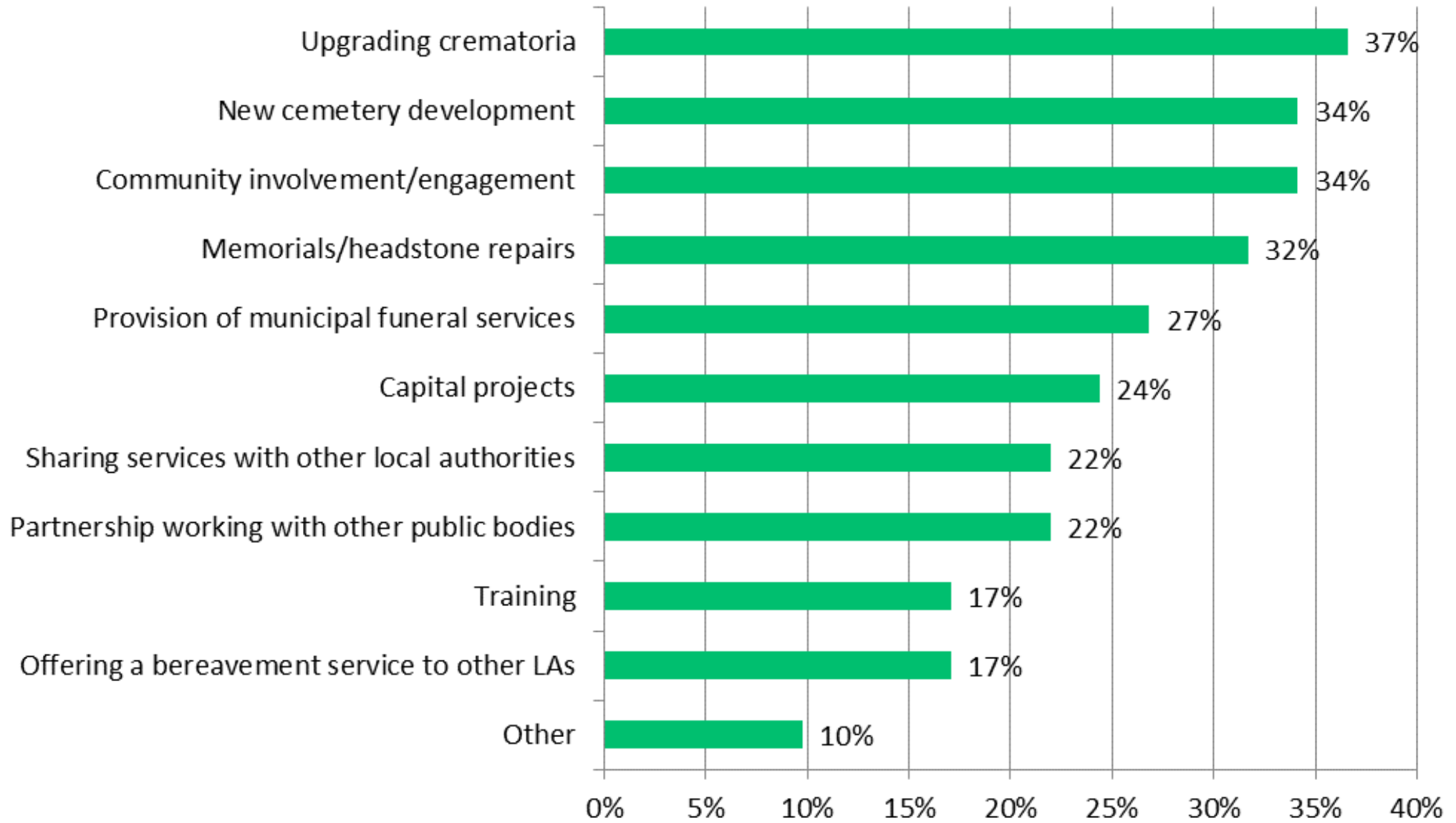
What social issues are a priority for your cemeteries and crematoria service?



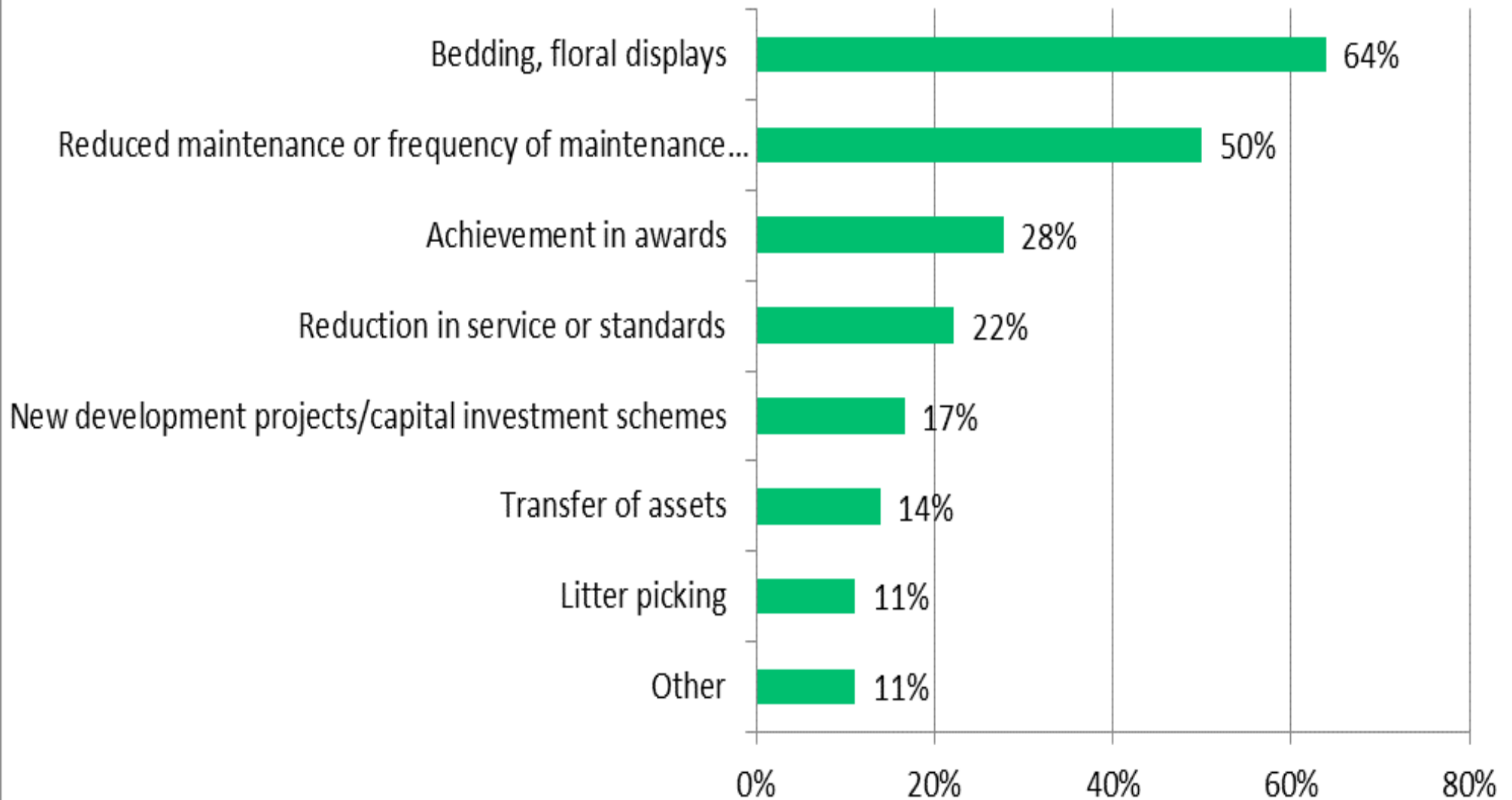
Budget Expectations



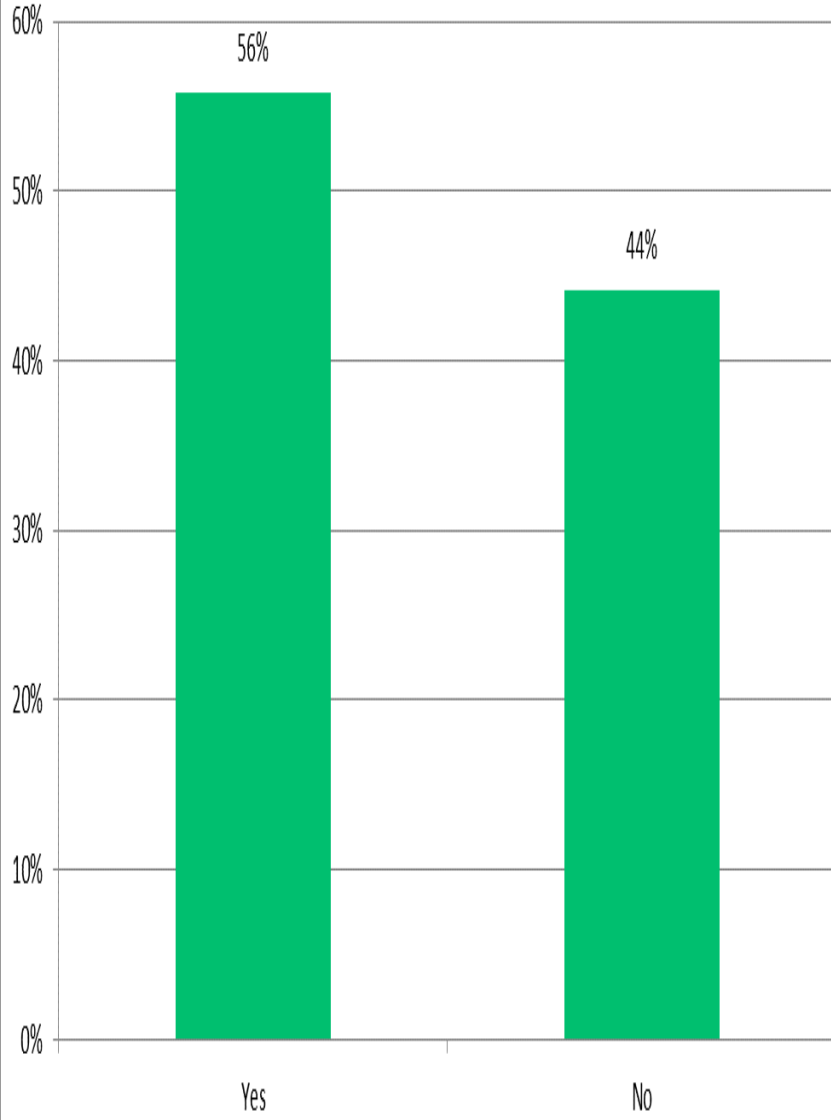
Where do you see growth for the service over the next 12 months?



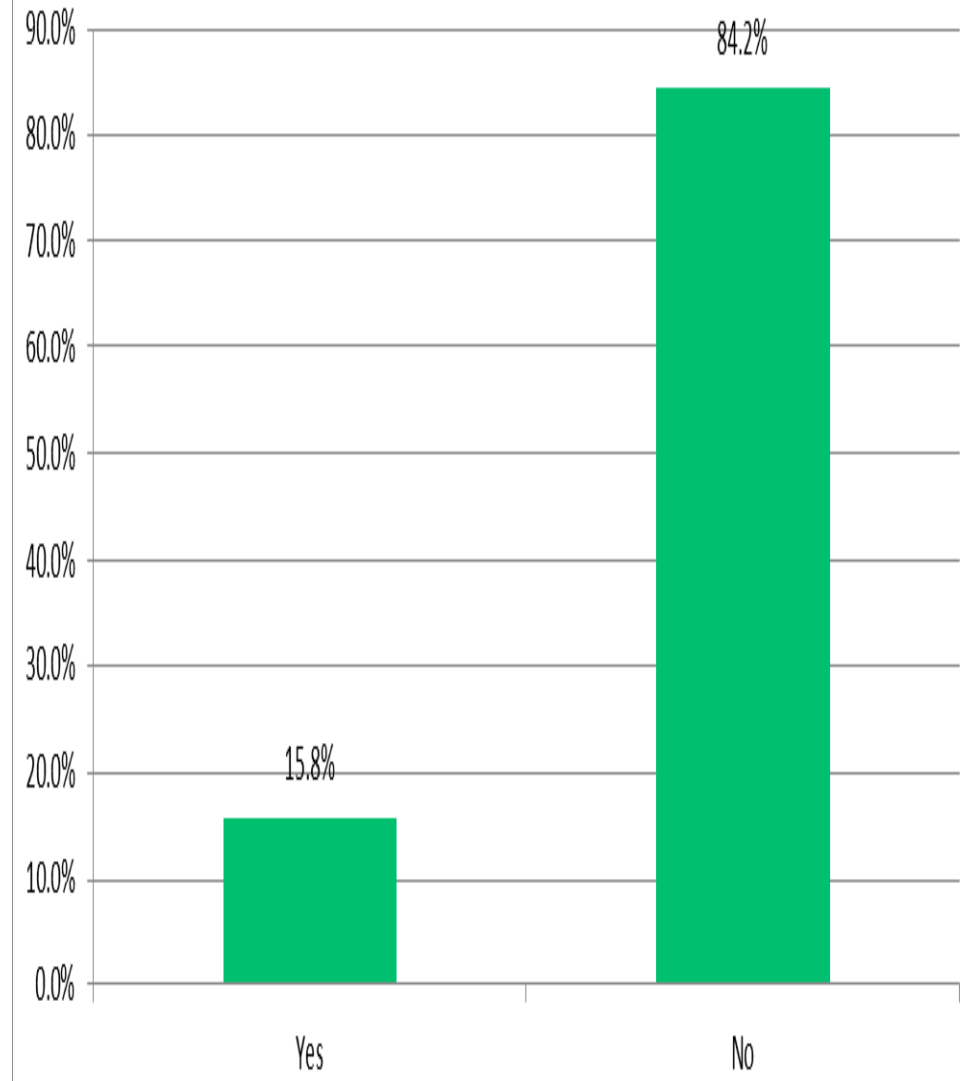
Where do you see future decreases in work for the service?



Are you already part of an integrated service?



If no, do you expect to become part of an integrated service in the near future?





Has Austerity bitten?

What the public think

Key findings: Trust and taxes remain high



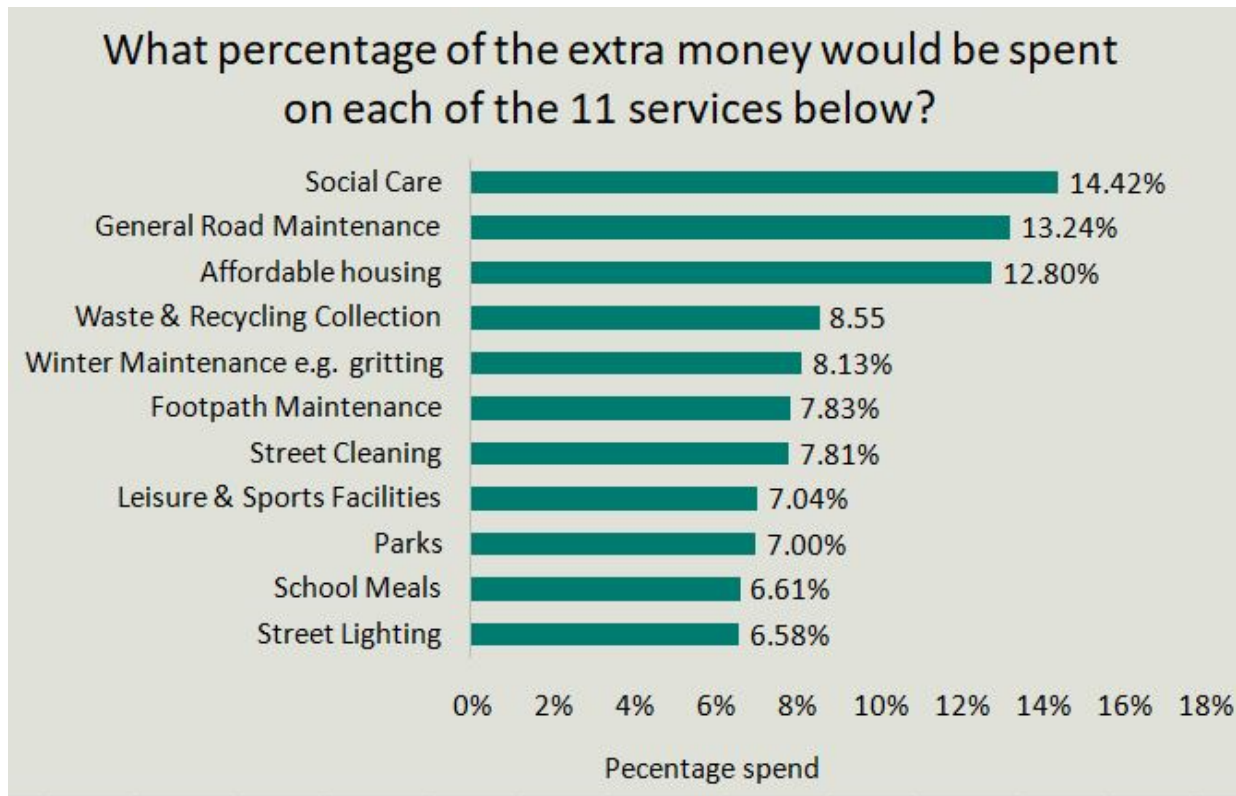
As in 2016, Trust in Councils and Councillors high versus Government ministers and Private Companies.

- Five times as many still trust the local Council over the Government to make decisions about how services are delivered provided in your local area
- Eight times as many trust local councillors over government ministers to make decision about their local area
- Five and half times as many trusted council to provide services in their local area over a private company with people trusting the council 7.5 times more than the government.
- 79% would like the government to give more money to local councils to spend at the local level for services that are their neighbourhood.

Performance of Councils services positive



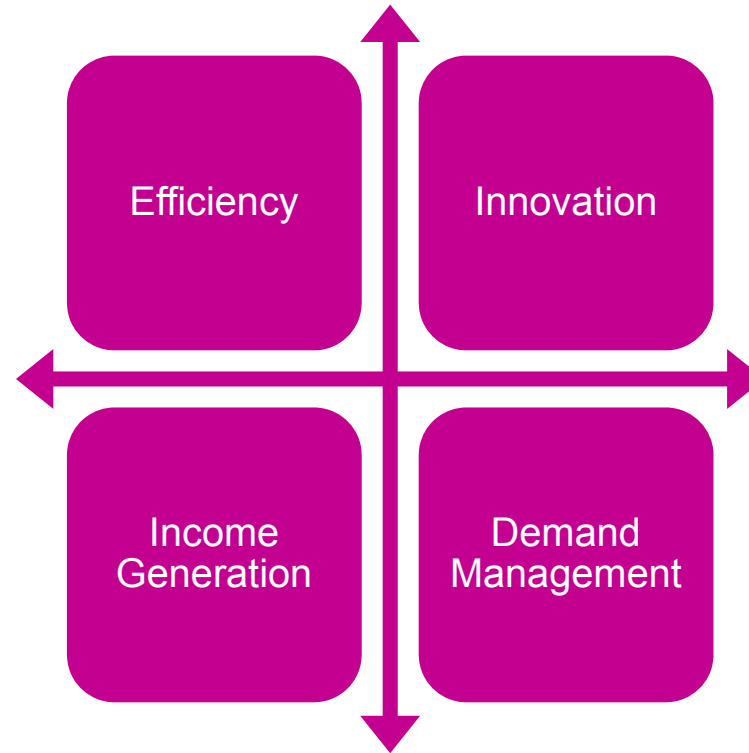
How the public would like extra funds spent



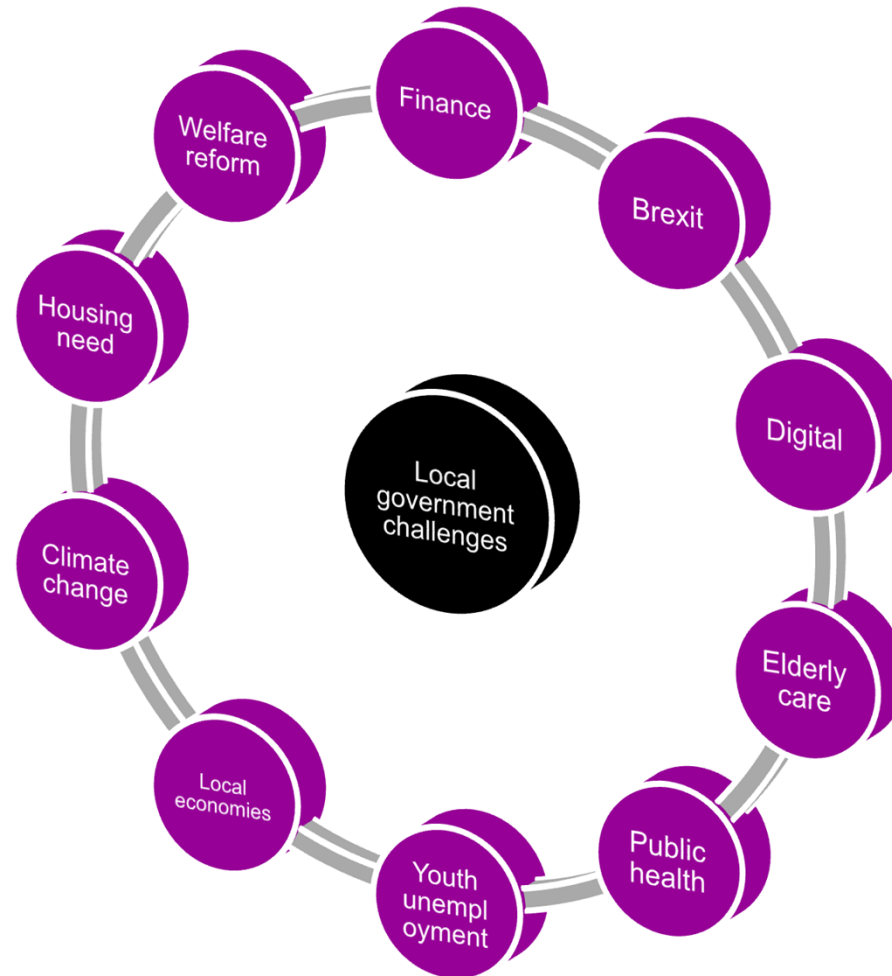
What will local government look like in 2020?



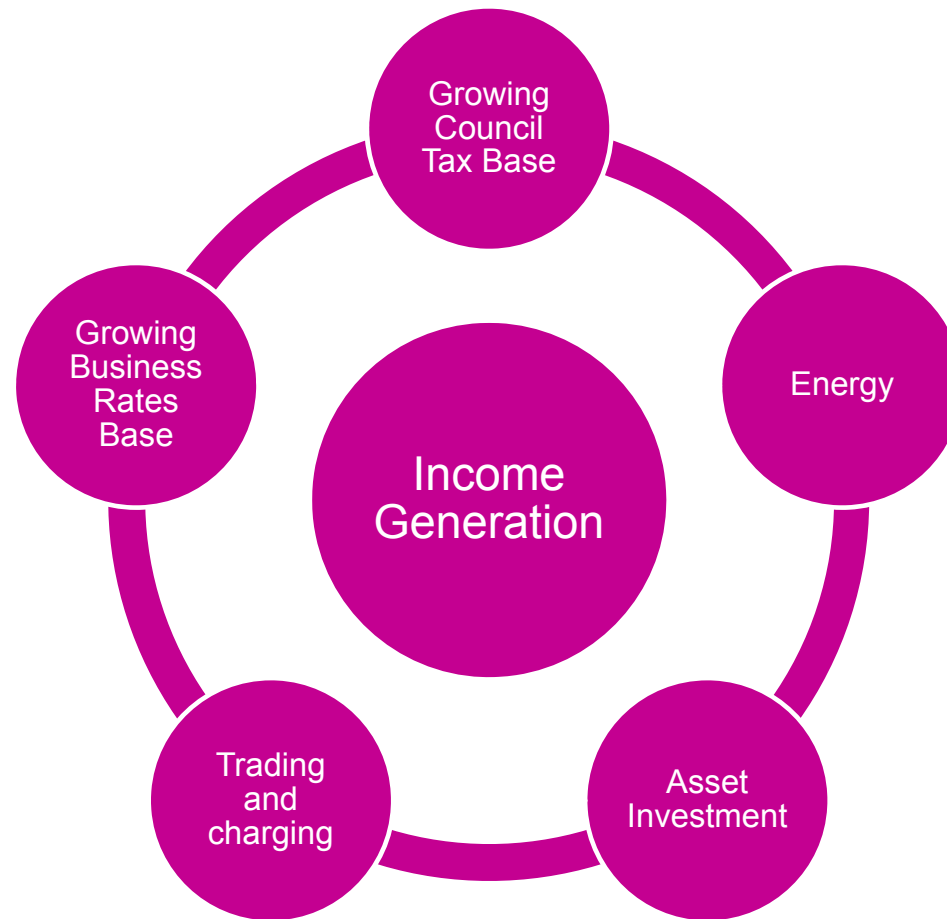
The pillars of excellence



Public policy challenges



Commercialisation Strategy

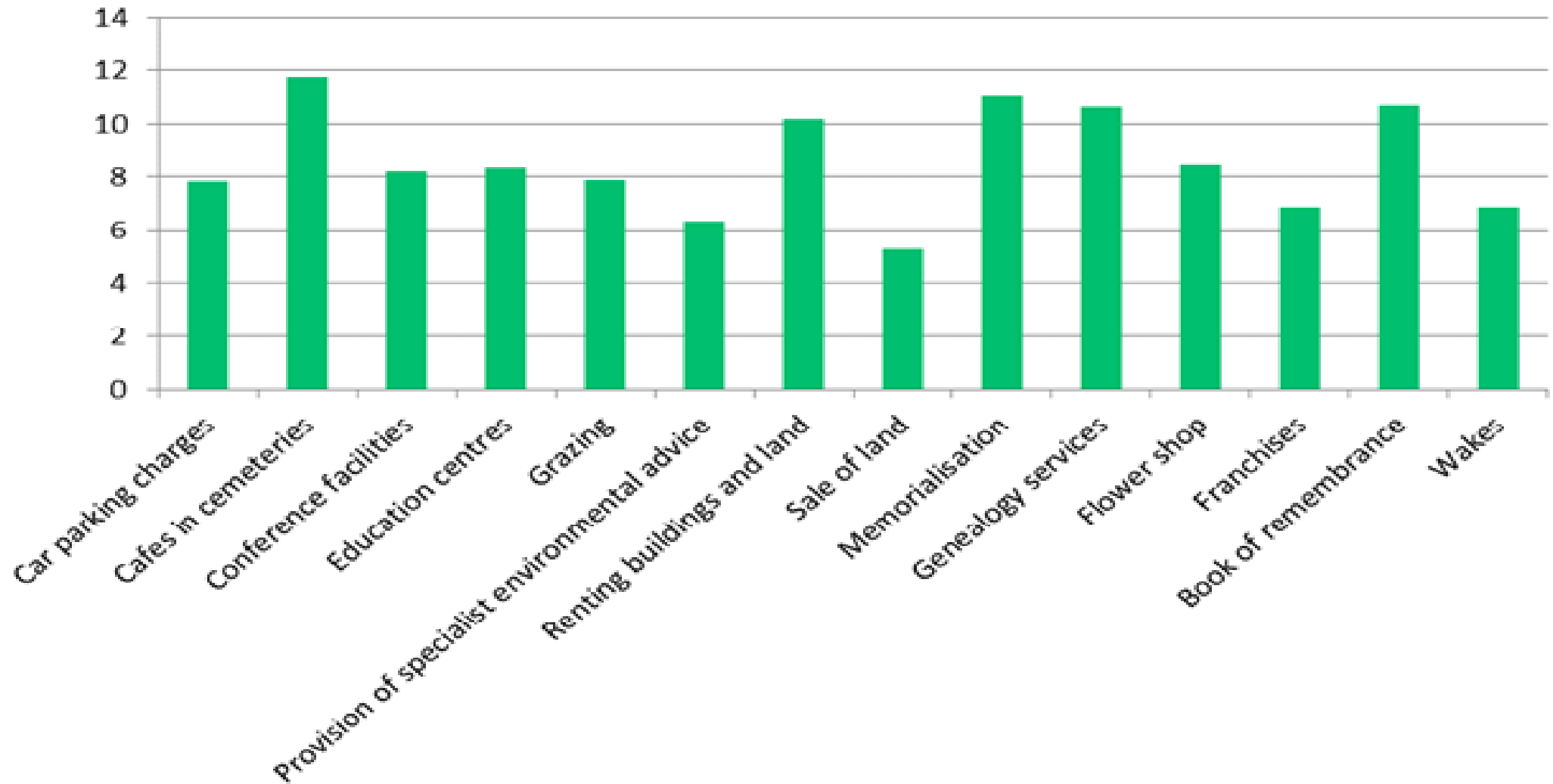


How do you expect to achieve any efficiencies required (eg Increase income level / introducing new services offers)

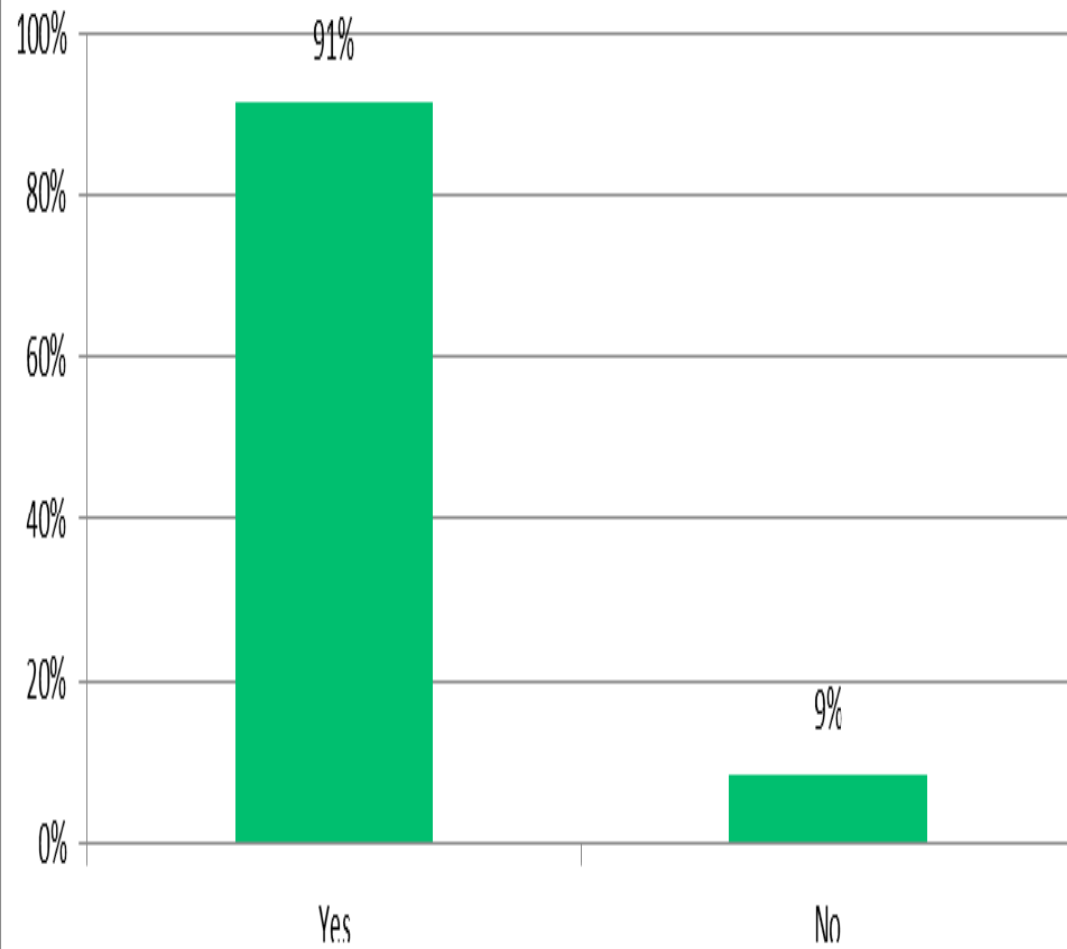


- Increase existing fees & charges
- Charging differential rates e.g. for non-residents
- additional fee for pre-purchase
- Charge for products previously free
- Introducing new and increased memorial offer and memorial mason services
- Utilising unused cemetery land to develop burial vaults, sarcophagi 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.
- Letting-out vacant cemetery buildings
- Full cost recovery dependent upon political agreement.
- 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.
- Introducing new service with additional fees (e.g. Saturday service provision).
- Use of heat exchange to reduce heating/energy bills.
- Using the ceremony rooms for other things other than funerals (outside funeral service times).

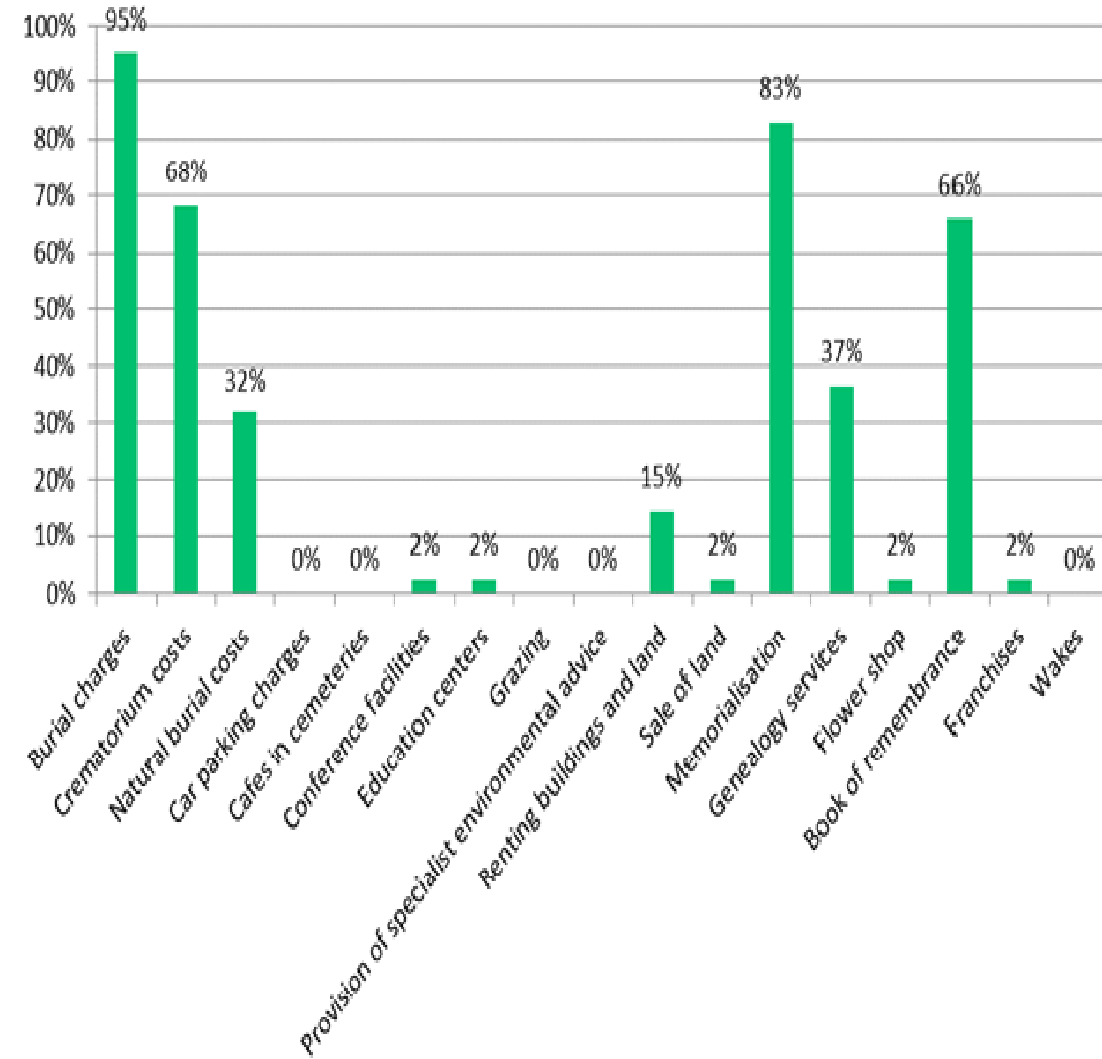
Apart from burial and crematorium charges, what other areas do you currently generate income through fees and charges (either provided in-house or through a franchise)?



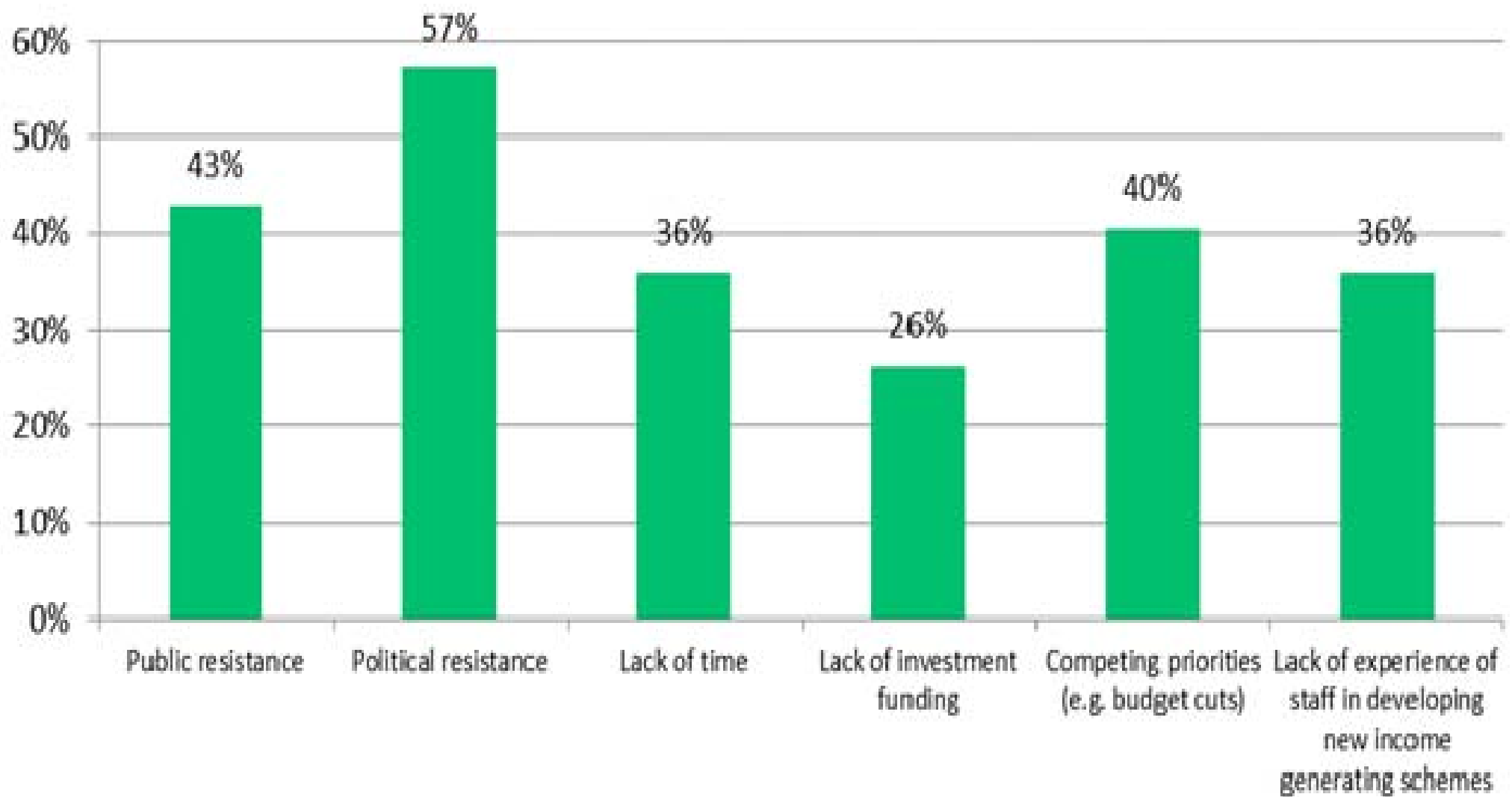
Are you intending to increase fees and charges over the next 2-3 years to meet efficiency pressures?



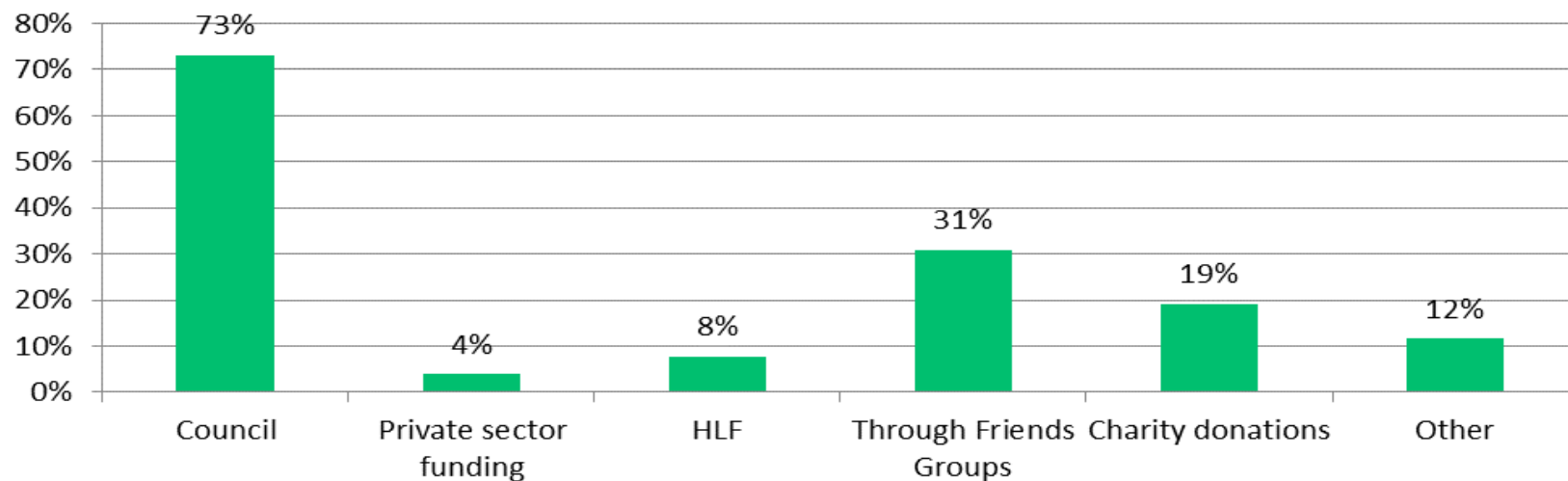
If yes, what areas do you intend to increase fees and charges in over the next 2-3 years?



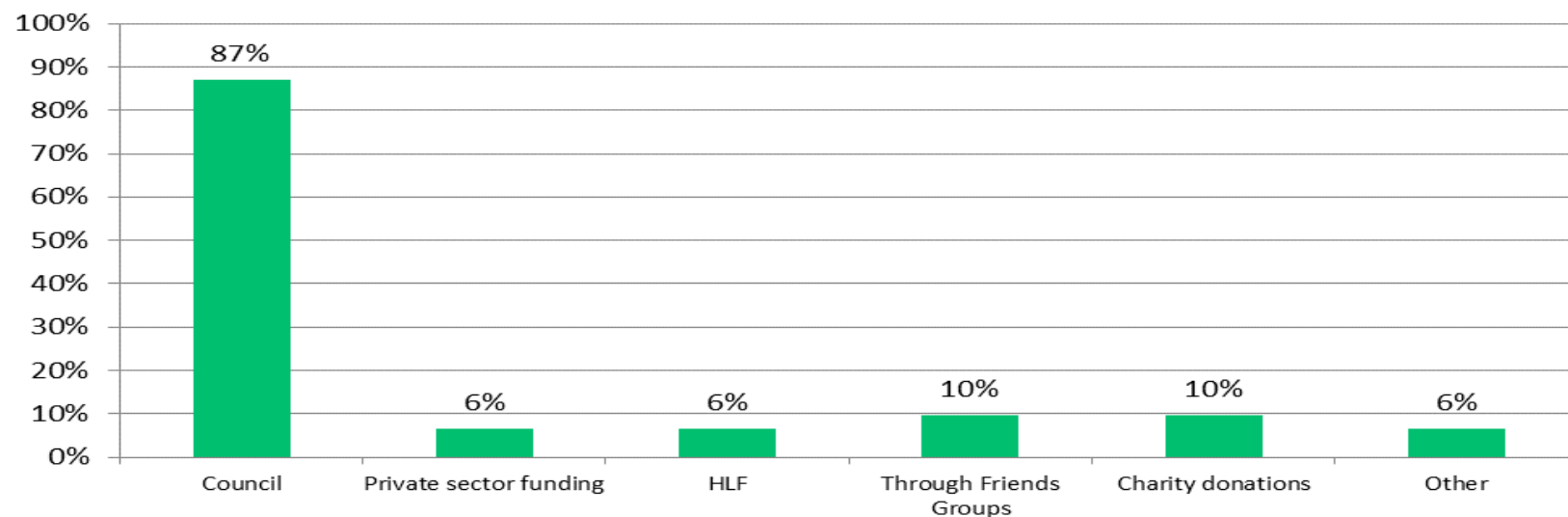
What are the barriers to generating income?



Has your service been able to obtain additional funding from the following sources?



% of total additional funding



Conclusions



- Budgets continuing to drop up to and 2020
- Sector response been good in terms of cost reduction, efficiency and improving productivity
- Public remain supportive of council cemetery and crematorium services
- This only takes us so far
- We now need to continue to seek out income generation opportunities to offset budget cuts
- Need for a commercialisation strategy
- Time for a spirit of municipal entrepreneurialism



LOCAL SERVICES

LOCAL SOLUTIONS



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