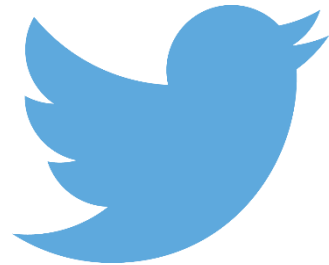




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APSE Parks State of the Market Survey Results 2023



State of the Market Surveys

- State of the Market Survey now in its 13th Year
- Local authority service areas
- Similar questions are asked to allow for trend comparisons
- Identifies common problems, innovations and best practice
- Insight into the future direction of the service
- Open to all APSE member authorities across the UK
- Key findings of the survey are expressed as a briefing note
- Useful for benchmarking and performance management
- Used by National Government and in APSE research documents
- Used in National Litter Strategy, HLF, State of UK Parks Report 2021, School Food Plan, Press and trade and national media to enhance knowledge of local government services.

State of the Market Survey 2023 Local Authority Parks and Greenspaces Services



The results

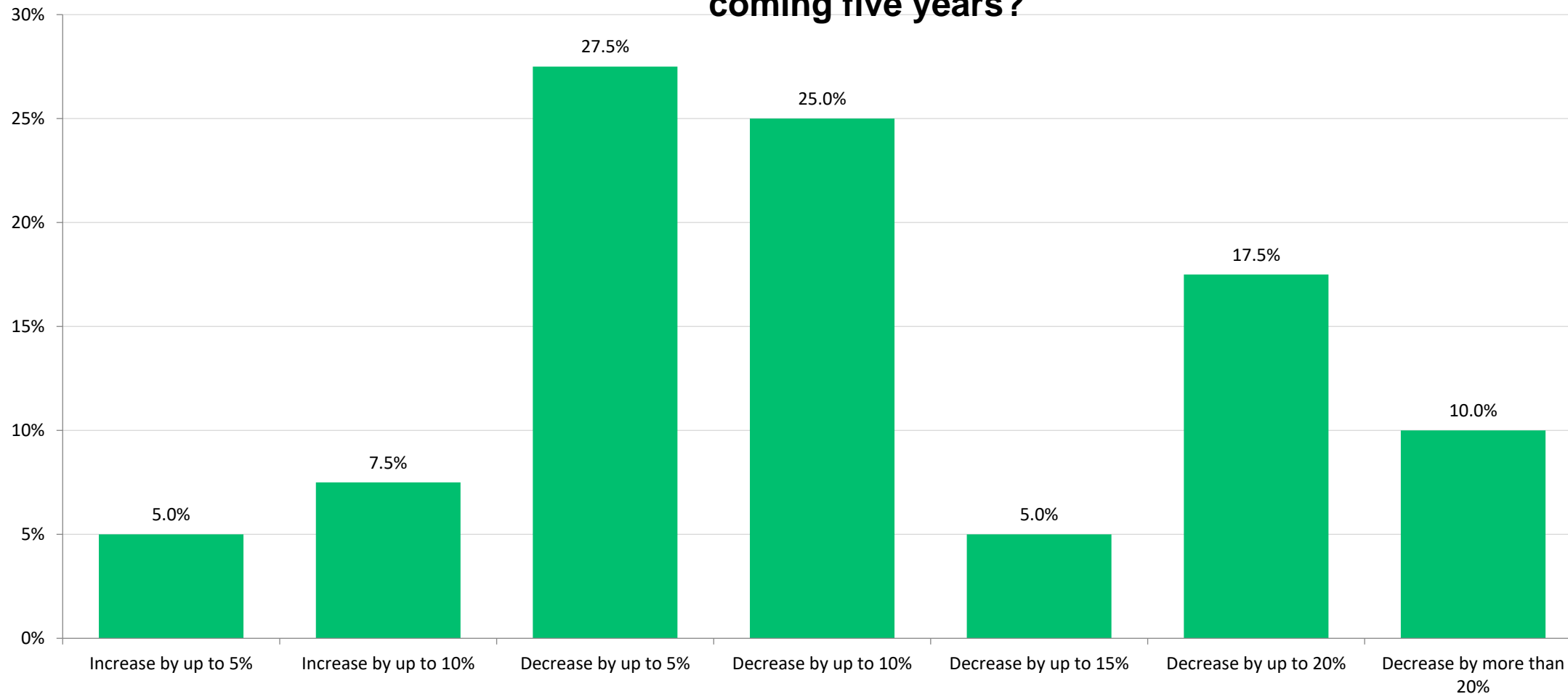
- 70% feel parks have had their budgets cut more severely than other services (86% in 2022)
- 83% said budget cuts have led to reduced levels of maintenance and increases in unmaintained land (92% in 2022)
- 92% feel lack of investment will impact adversely on health and social well-being (100% in 2022)
- 91% feel there is a limit to the involvement in how volunteers can help deliver parks and greenspace services (100% in 2022)
- 89% stated parks should be free for the public to access (94% in 2022)

Some level of optimism, but the services provided by parks during the pandemic, do not seem to be being rewarded with new or additional resources to a level many had hoped for.



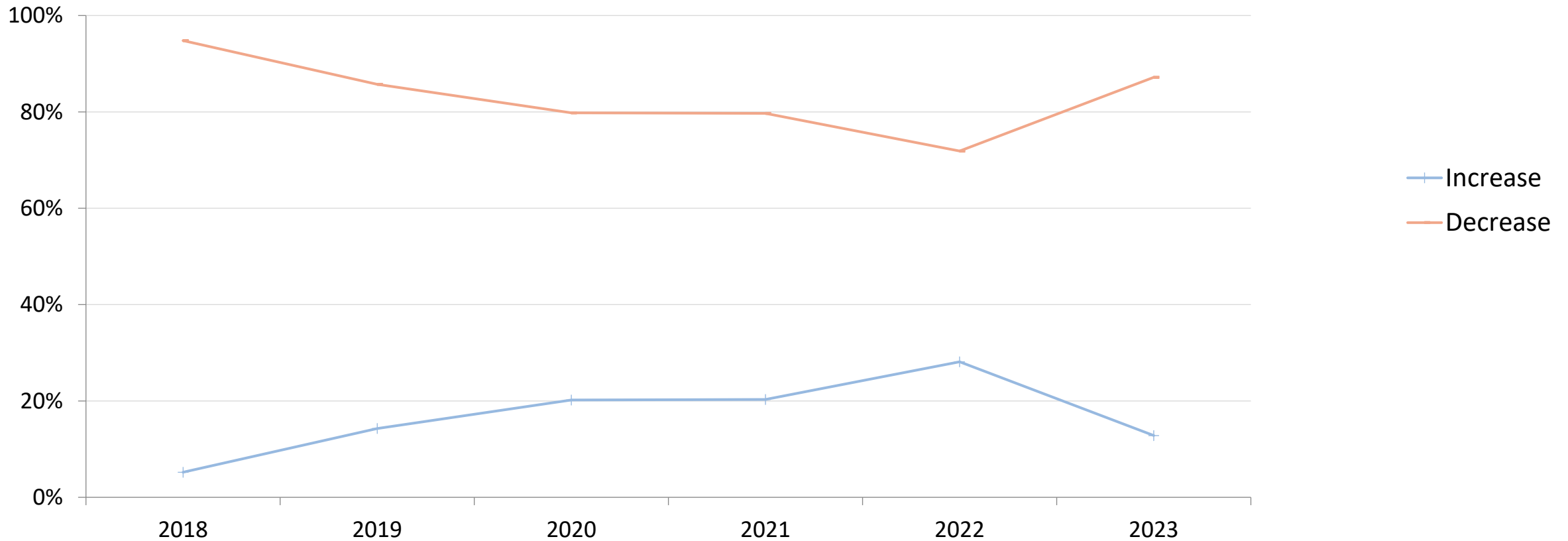


What is your expectation of the level of funding in your service budget in the coming five years?





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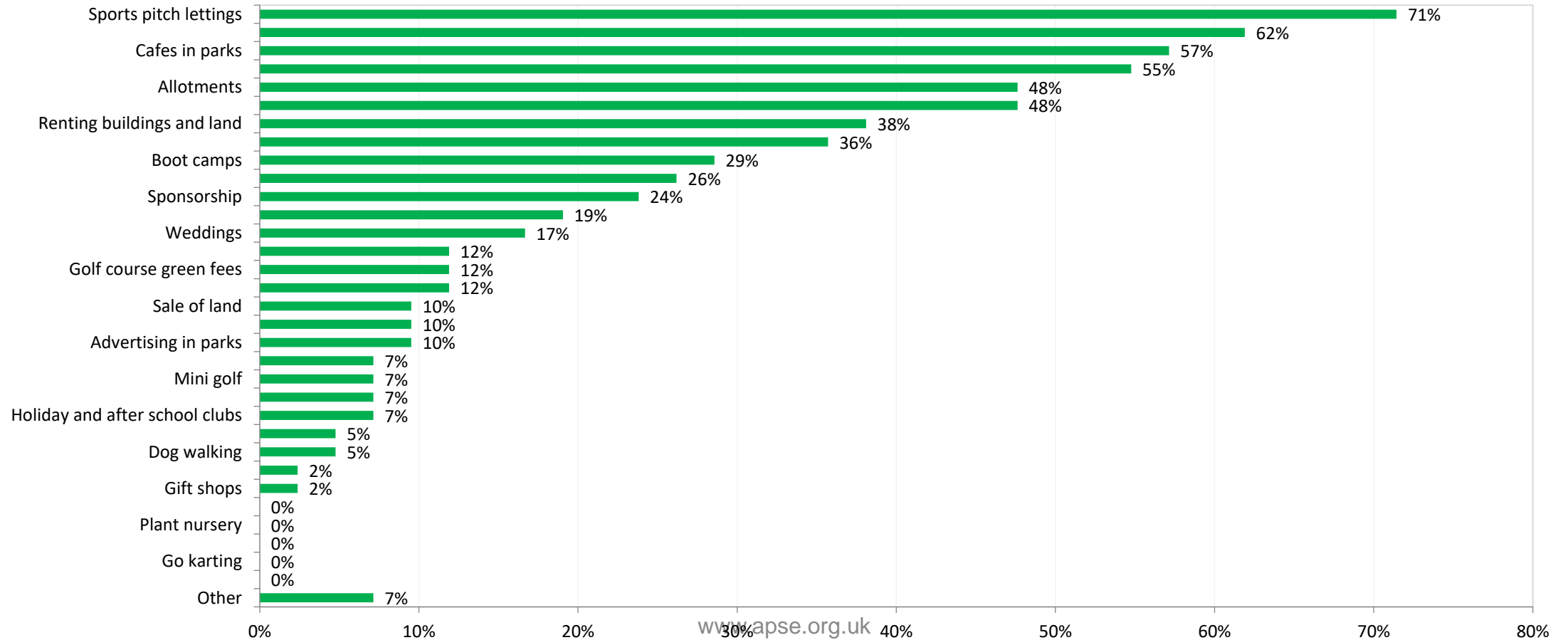
Service Efficiencies

- **Rethinking staffing levels** through reducing management tiers, cutting administrative staff, reducing IT/communications systems updates, introducing larger seasonal staffing, increasing volunteering opportunities, and introducing role flexibility
- **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)
- **Increased use of digitisation** to drive service efficiencies, e.g. identifying all areas of greenspace maintained and charging landowners where responsibilities do not currently lie.
- **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** and improving mapping of greenspaces managed and charging where responsibility lies elsewhere
- **Reductions in services** (play area and toilet provision)
- **Bringing services back in-house** to reduce contractor costs and increased flexibility opportunities.
- **More effective location of staff** to reduce travel costs
- **Increasing Biodiversity** through changes to current management operations and the creation of new habitats and reducing carbon footprint.



Income generation

What areas do you currently generate income in through fees and charges (either provided in-house or through a franchise)?





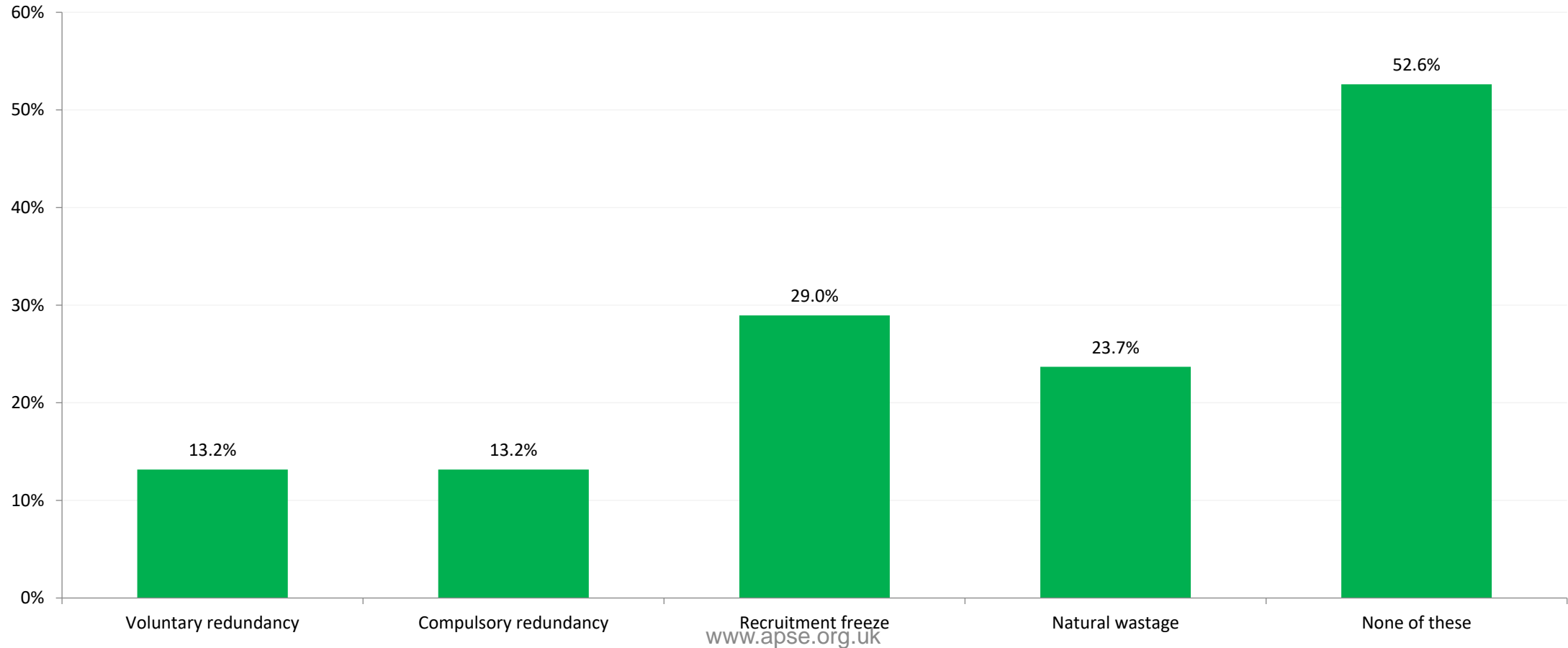
Main areas where fees will be increased in the next 2-3 years

- Allotments
- Cafes in Parks
- Sports pitches/Festivals, concerts and events
- Fairgrounds
- Ice cream vans/mobile caterers
- Car parking
- Tennis courts/Renting buildings and land
- Bowling greens



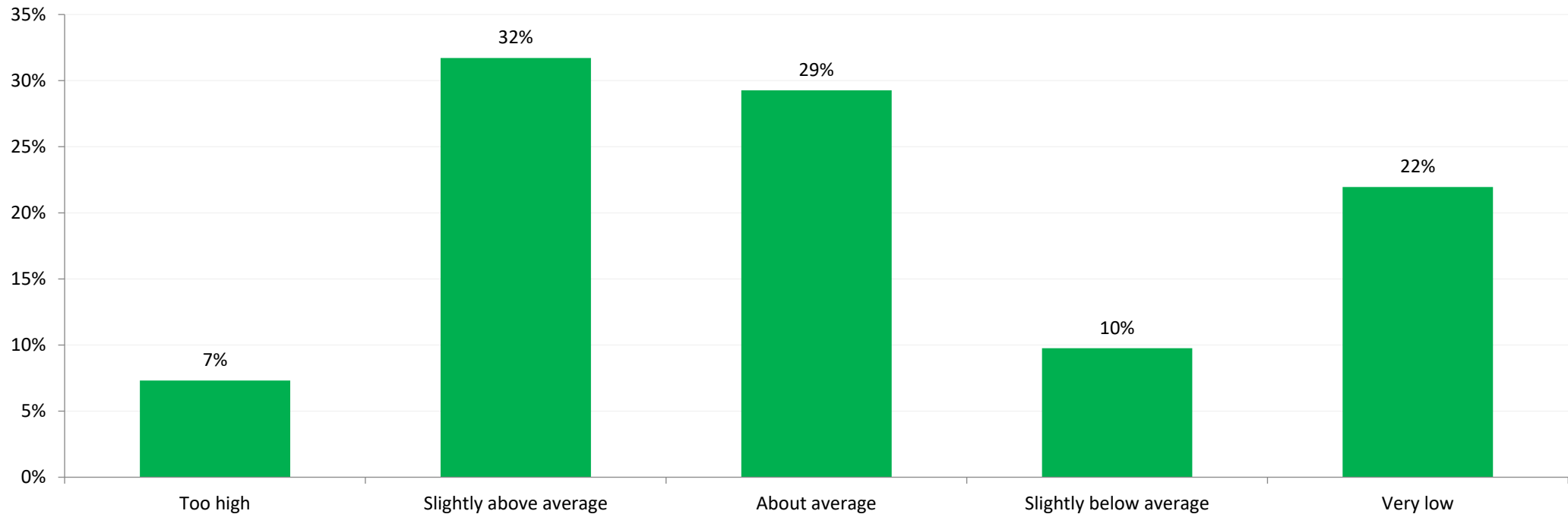
Staffing Issues

Has or does your service intend to implement any of the following within the next 12 months:



Staff Absence Levels

Are staff absence levels at an acceptable level?



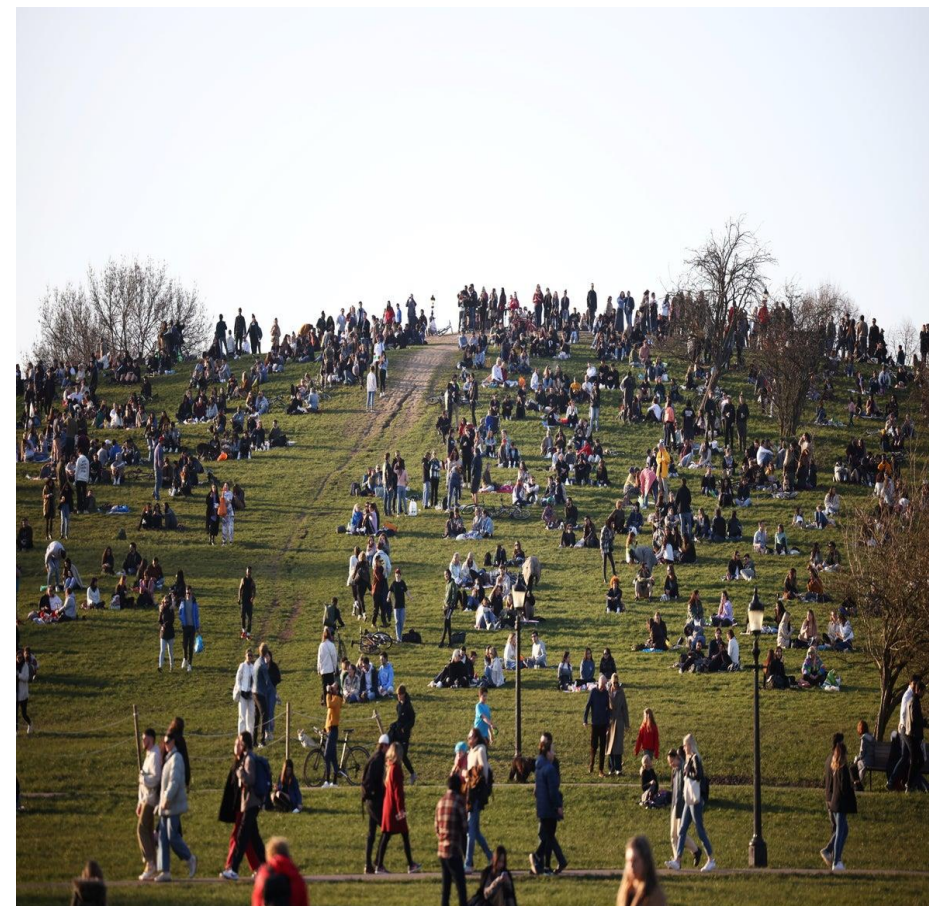
Training and Apprentices

- 71% expect training budgets to stay the same in the next 12 months – only 5% reported increases.
- 43% of respondents said they currently have apprenticeship schemes (61% in 2022)
- Concerns over uptake, standard of applicants , poor performance and ultimately a lack of a guaranteed job at the end of the scheme.
- Real ‘mixed bag’ from responses as to whether they will continue to provide apprenticeship programmes in the future.
- Underlying comment was that most would like to provide apprentice opportunities if they could afford them, and guarantee jobs at the end of the scheme.



Park Visitor numbers

- 60% of parks are still experiencing increasing numbers of visitors to their parks.
- 36% felt numbers had remained the same.
- No evidence that numbers have fallen significantly post-pandemic.
- Pressures on budgets and infrastructure still high.
- No real sign that new funding is being made available to support this added pressure.
- Concern is that only 40% of respondents monitor visitor numbers and then only in certain parks.
- Real need to accurately record visitor numbers if justification can be made for extra funding.



Ranger Services

- 40% report having Ranger Services (50% in 2022)
- 58% of Ranger Services have 1-5 FTE posts.
- Main activities are :
 1. Litter Picking/Supervising volunteers
 2. Security/ Educational advice
 3. Maintenance of parks infrastructure/Guided walks
 4. Event Management
 5. Meet and greet/ enforcement
- Despite numbers having Rangers, nearly half of all formal parks don't have an on-site presence.



Areas of Service Growth and Decrease

Service Growth

- Community involvement and engagement.
- Conservation /management of climate change
- Capital Projects
- Partnership working with other public bodies
- Events in parks

Service reduction

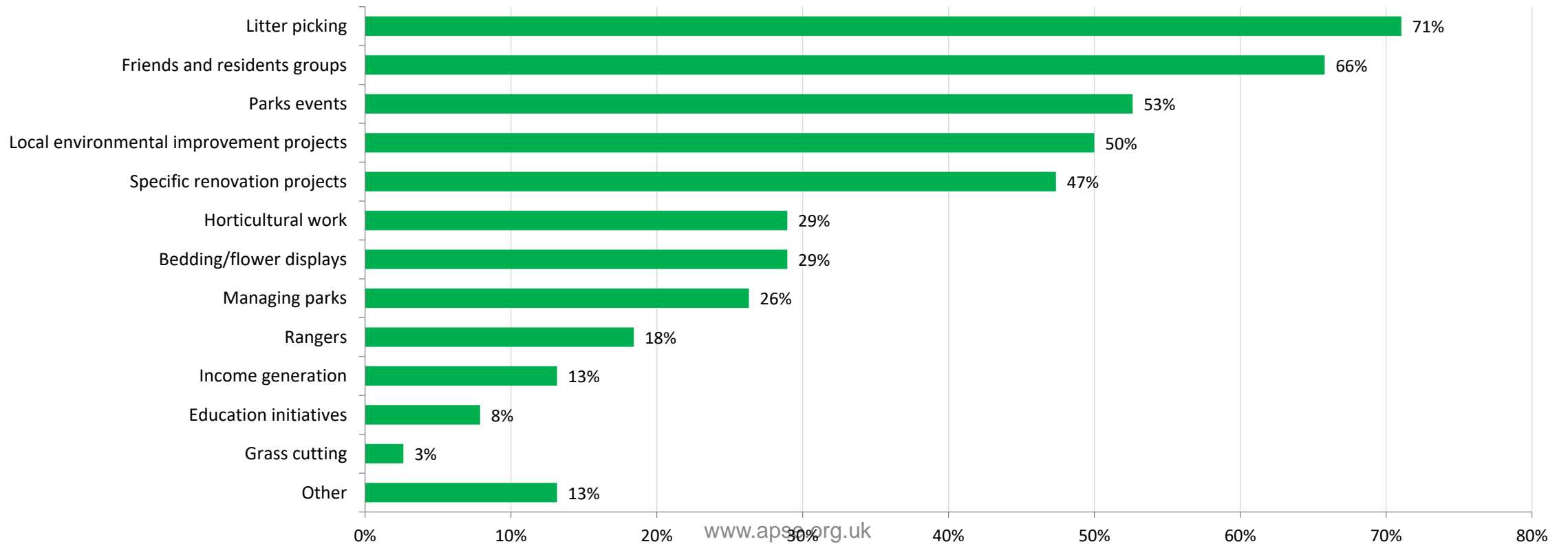
- Reduced frequency of service in existing areas
- Reductions in provision of bedding and floral displays
- Reductions in actual service standards
- Reductions in areas for sporting provision
- Applications for awards



Use of Volunteers

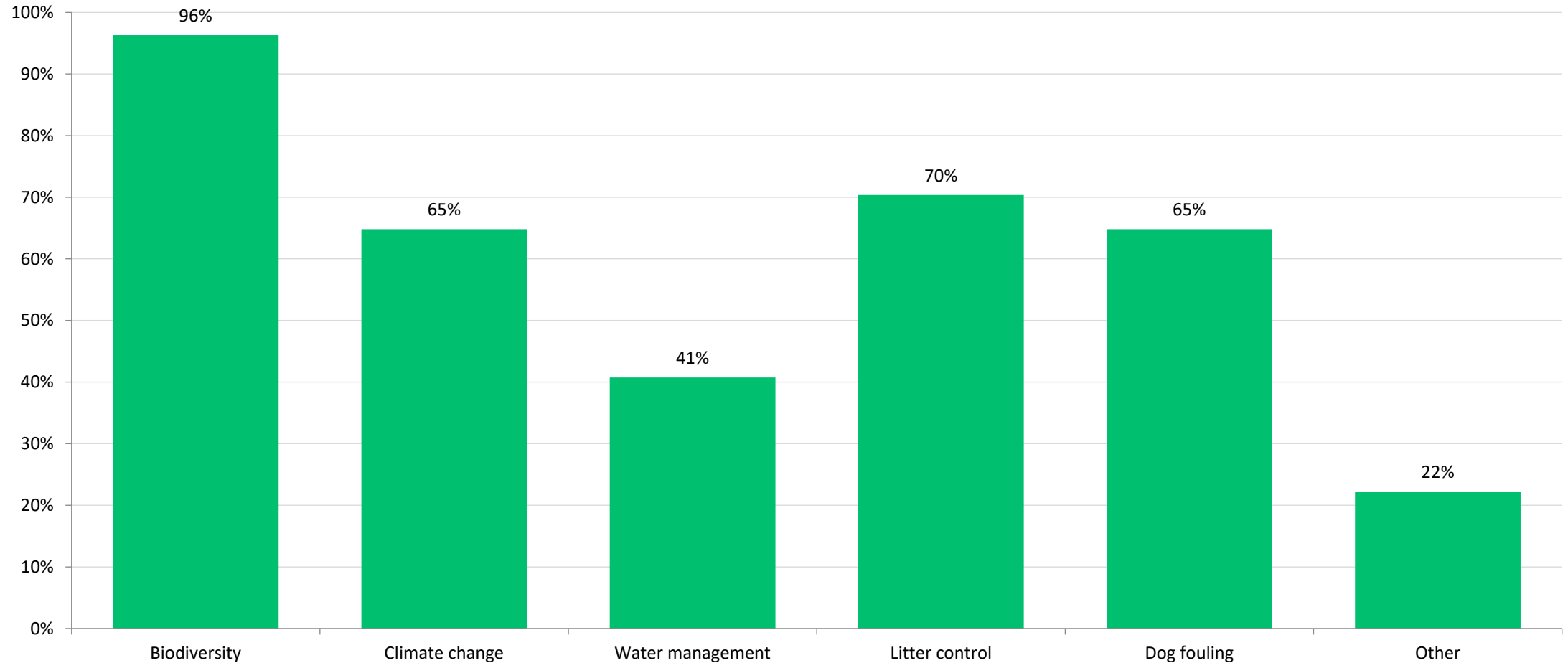
- 90% of respondents reported having Friends of Parks operating in their council areas.

How are volunteers involved in the parks service?



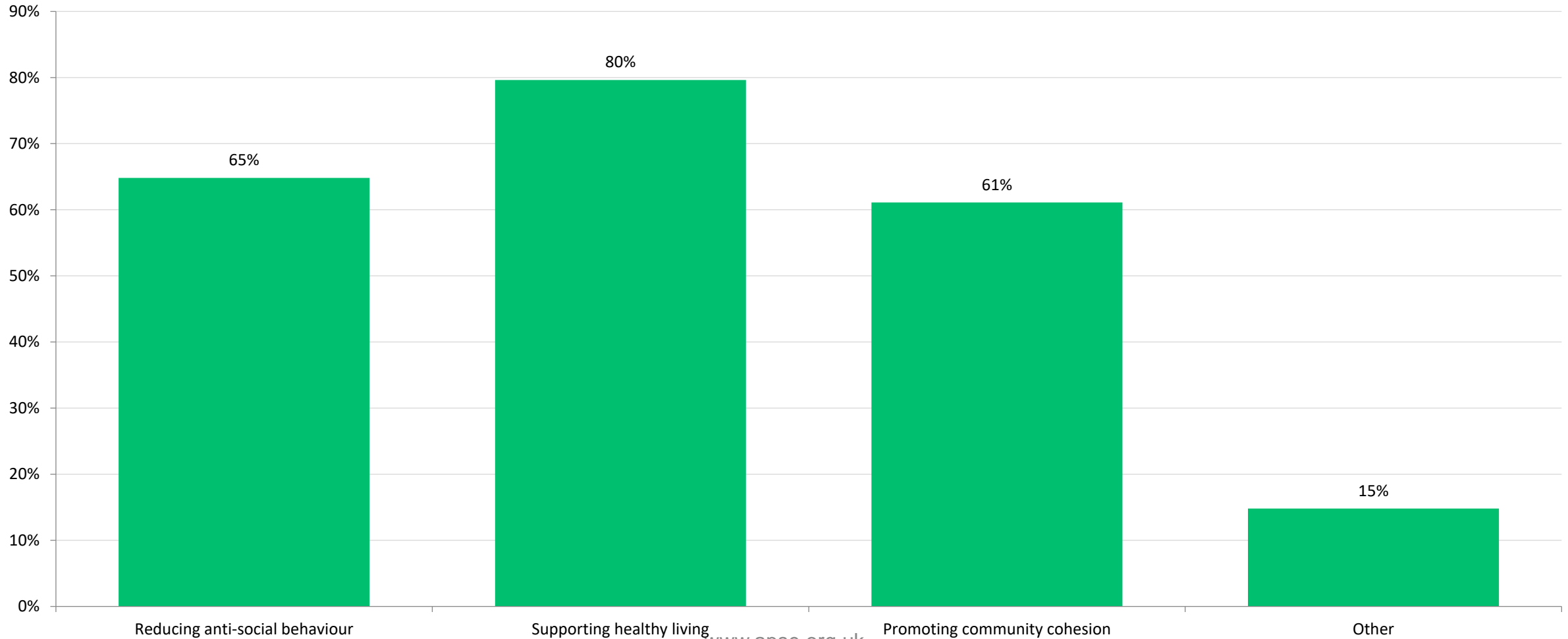


What environmental issues are a priority for your parks and green space service?





What social issues are a priority for your parks and green space service?





Main Findings of the State of the Market Survey 2023.

- Many feel that the benefits parks brought to the nation during lockdowns and their acknowledged wider values are not being recognized with sufficient new or additional funding.
- Many respondents are continuing to expect reductions in both capital and revenue budgets.
- Wide-held view that parks should become a statutory service to save budgets and to continue to provide health and well-being benefits
- Concern that apprenticeships are not valued or sustainable with regards to providing future employment opportunities.
- Ranger services are under threat and many formal parks do not have permanent presence.
- Income generation is becoming increasingly important to help plug budget gaps.
- Parks are being looked upon to help create opportunities for biodiversity and help reduce negative impacts of climate change.
- Free access is still widely supported as a means to increase public health and wellbeing.
- **Parks and Greenspace Managers are still keeping their heads above water – the question is for how long?**

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