

State of the Market Survey 2019

Cemetery and Crematorium Services



April 2019
19-18



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

For any enquires in relation to the survey, Wayne may be contacted on:

Tel: 0161 772 1810

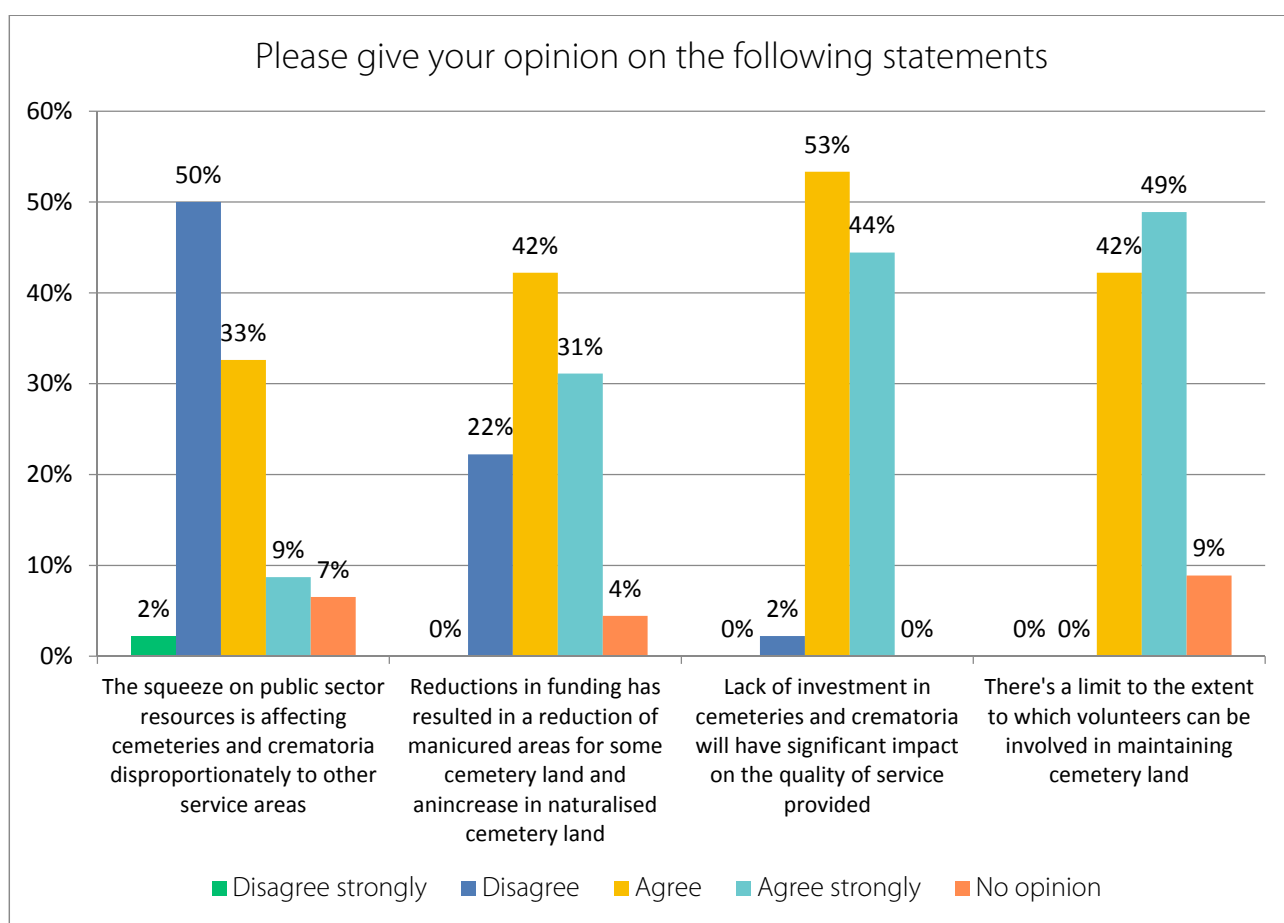
Email: wpriestley@apse.org.uk

Local Authority Cemetery and Crematorium Services

State of the Market 2019

APSE conducted an online survey during February and March 2019. 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 50 local authority responses were received from councils throughout the UK. This report identifies the key findings of the survey.

Results from the survey

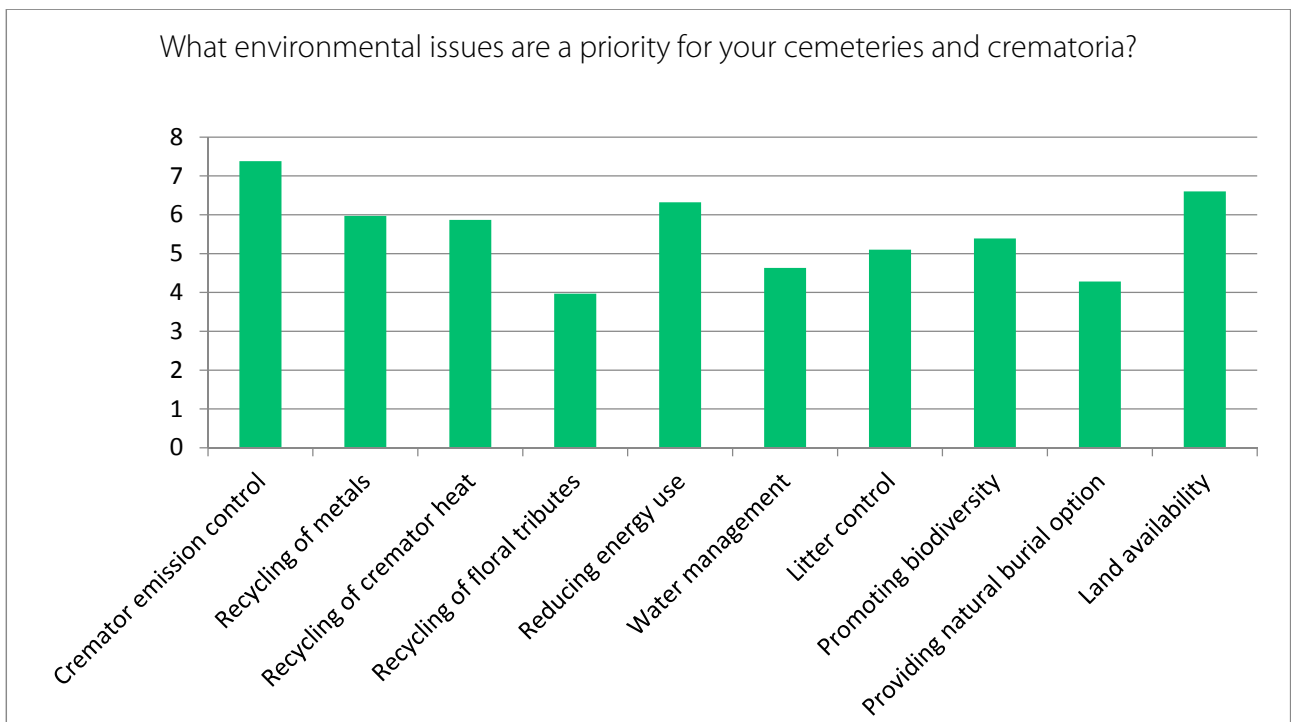


From the opinions received, there does appear to be a general feeling that austerity has not had as big an impact on Bereavement Services as some of the other local authority services. This view is supported by the fact that with regards to bereavement services being affected disproportionately in terms of 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 42% 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 a noticeable change was in relation to the quality of grounds maintenance, where almost 73% felt standards in grounds maintenance had suffered with reductions in the amount of manicured areas and greater levels of naturalised planting taking place.

Interestingly with regards to the use of volunteers 91% felt that there was a limit to involving them in grounds maintenance which was the same as last year. However, the amount 'agreeing strongly' with this view, has risen slightly over last year, which may suggest there may have been some issues with the use of volunteers. Volunteers are very much seen as bringing added value to services rather than being seen as being able to carry out core service work, but there are likely to be variations in the complexity of roles volunteers are given.



It is perhaps no surprise that key environmental issues are very much the same as last year with slight increases in several areas (reducing energy use and promoting biodiversity).

The priorities are largely 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. The visual appearance of cemetery grounds is also well represented with litter control and opportunities or promoting biodiversity again 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.

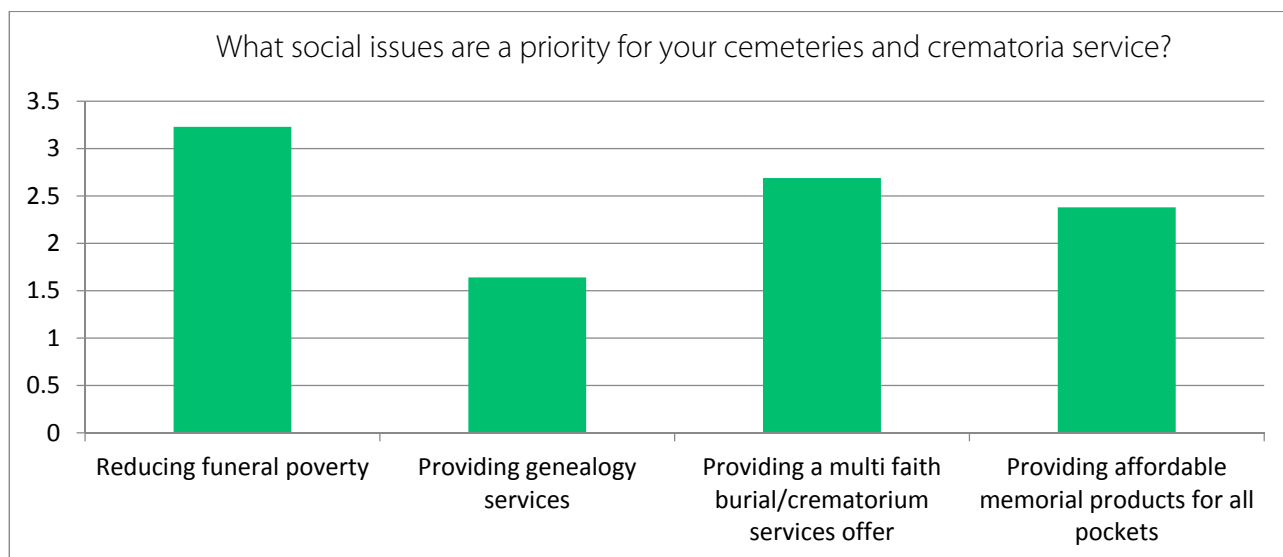
Are there any other environmental issues which are impacting upon your service?

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 soil 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

New areas of concern included noise pollution from surrounding industries which may be a localised issue but may also reflect the need to use consider the impact of land use near to cemeteries. Also due to increased rainfall which may be attributed to climate change several respondents reported increased incidents of waterlogging.

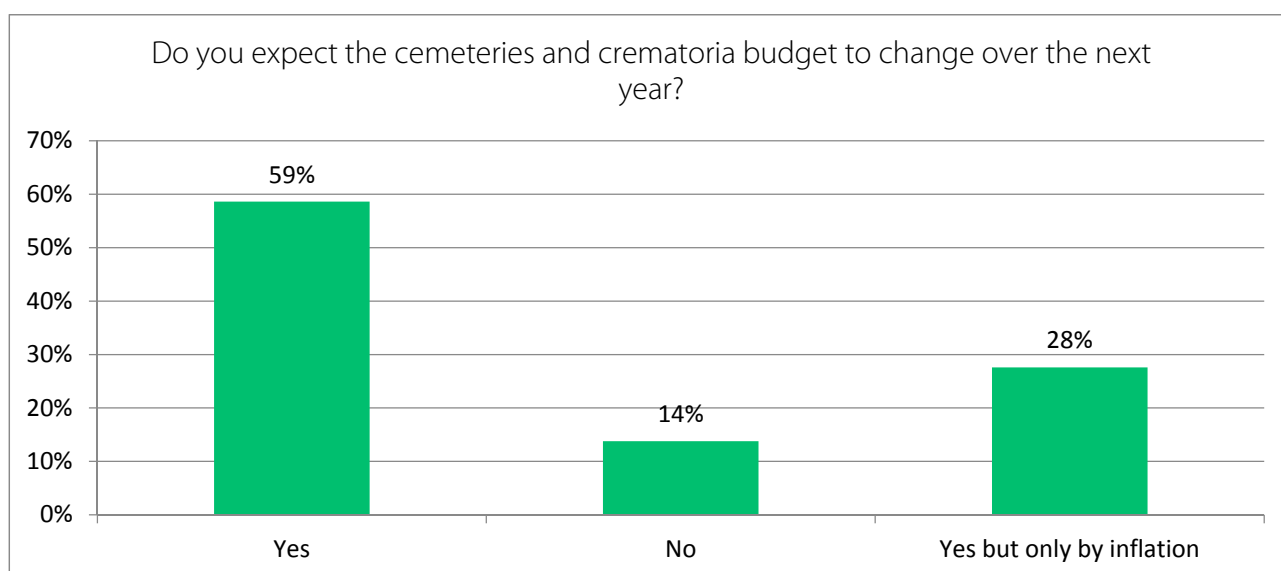


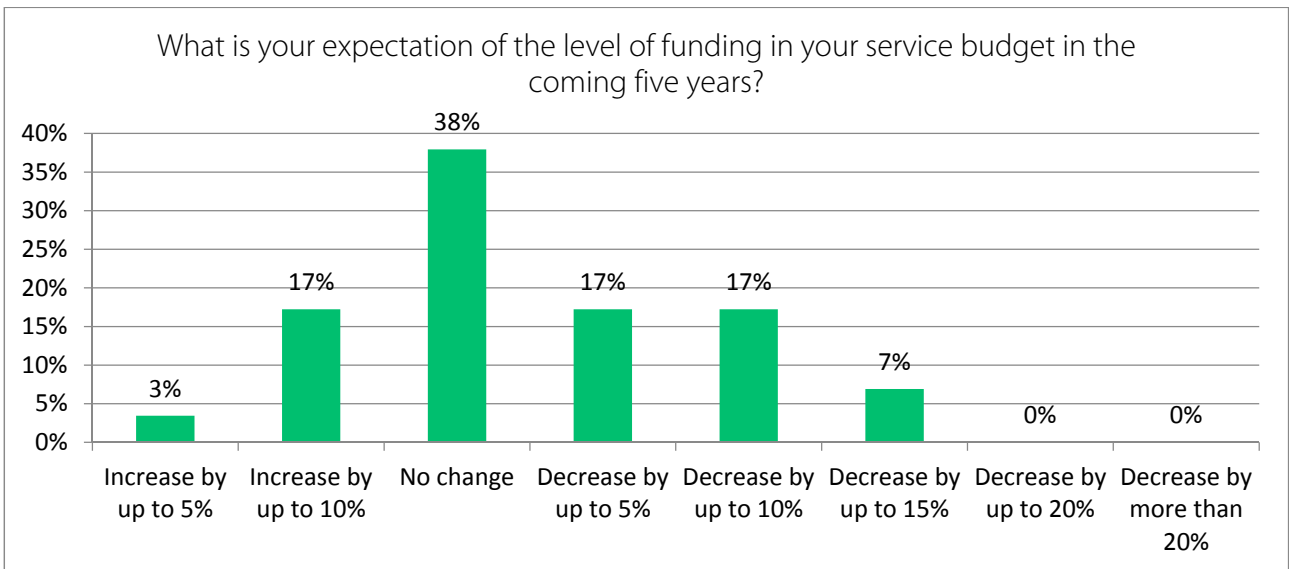
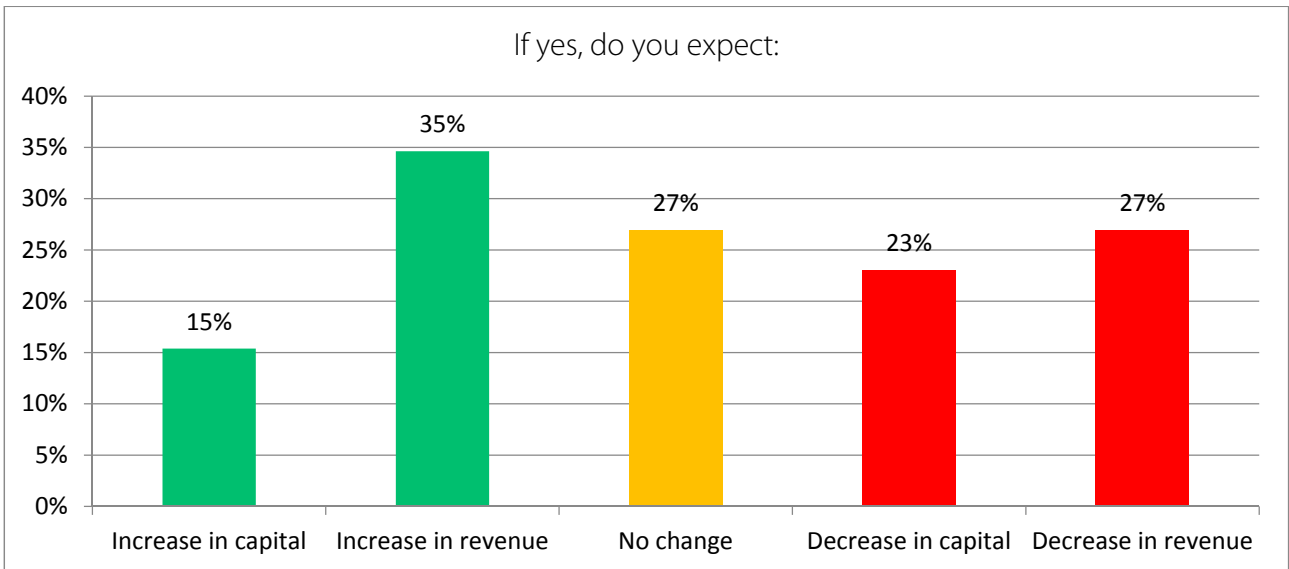
As with last year's results, it is apparent that there is a growing need to adapt service provision to enable Bereavement Services to meet the growing demand for affordable funerals which has risen in the number of respondents recording this as a key social issue. This may have a financial impact on 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. Multi-faith burials caused by the UK's population becoming more ethnically diverse are still high on respondents agendas.

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 fee increases when necessary would be considerably lower resulting in the financial strain on bereaved families being eased.
- Unauthorised memorials as well as the different styles/suitability of memorials being requested/installed.
- Anti-social behaviour appears to be increasing
- Bereaved reporting government-funded funeral grants are insufficient and overly complicated.
- Transfer of ownership of exclusive rights of burial are causing problems for some.





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. However the one significant change over 2018 is there has been a 10% decrease in those expecting to see a decrease in their capital budgets, which may suggest that either service budgets are improving or income generation is being used to fund new capital spend and therefore supporting or increasing capital budgets. This is also reflected in the increase in the number of respondents who are expecting increases in their budgets of between 5% and 10%. In 2018, 15% expected increases within these ranges, whereas in 2019, 20% are expecting increase of between 5% and 10%.

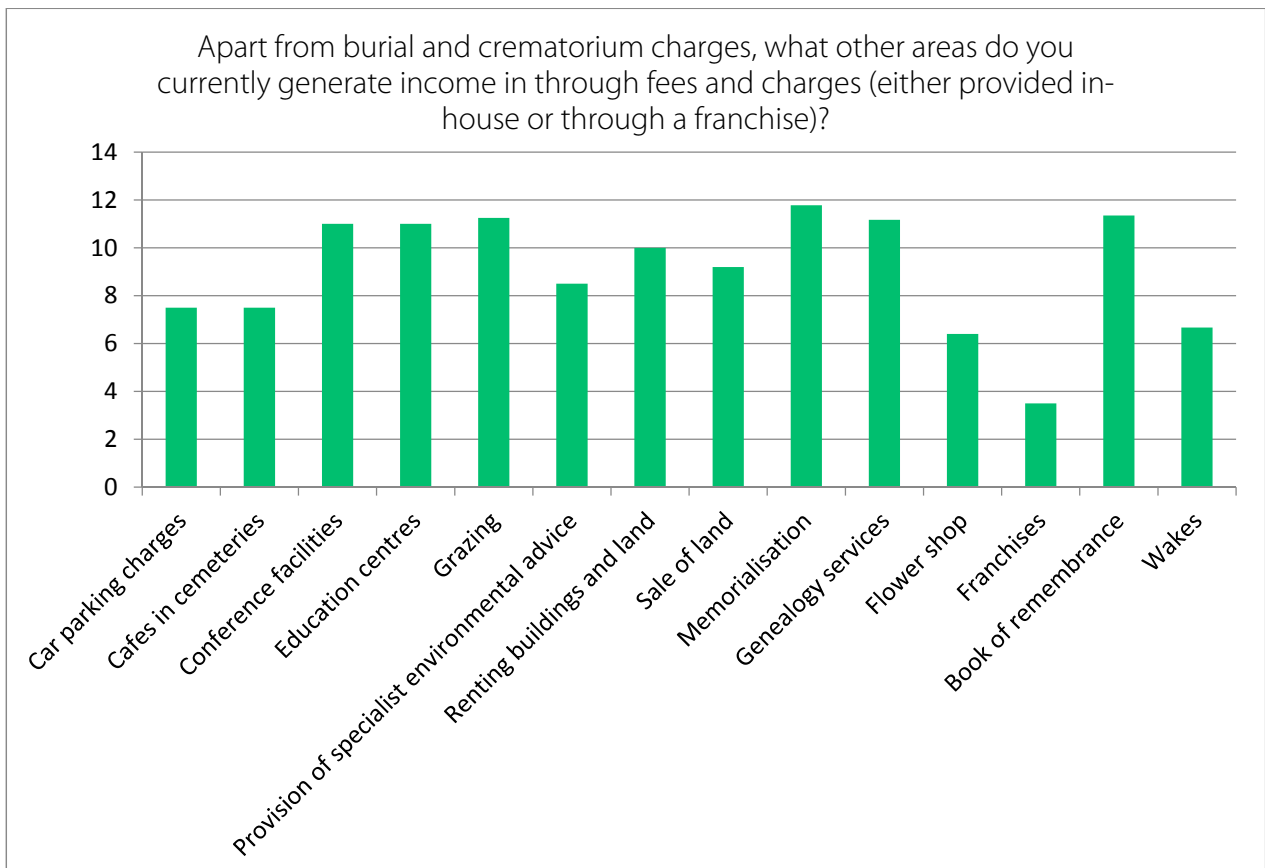
How do you expect to achieve any efficiencies required (e.g. increased income levels / introducing new services offers)

As in the 2018 results, clearly improving service efficiency is an area where there is a great deal of focus. With budgets across many 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.

New additions for 2019 include:

- Offering pre-purchasing of burial plots.
- Greater market-testing of suppliers rather than using traditional suppliers.



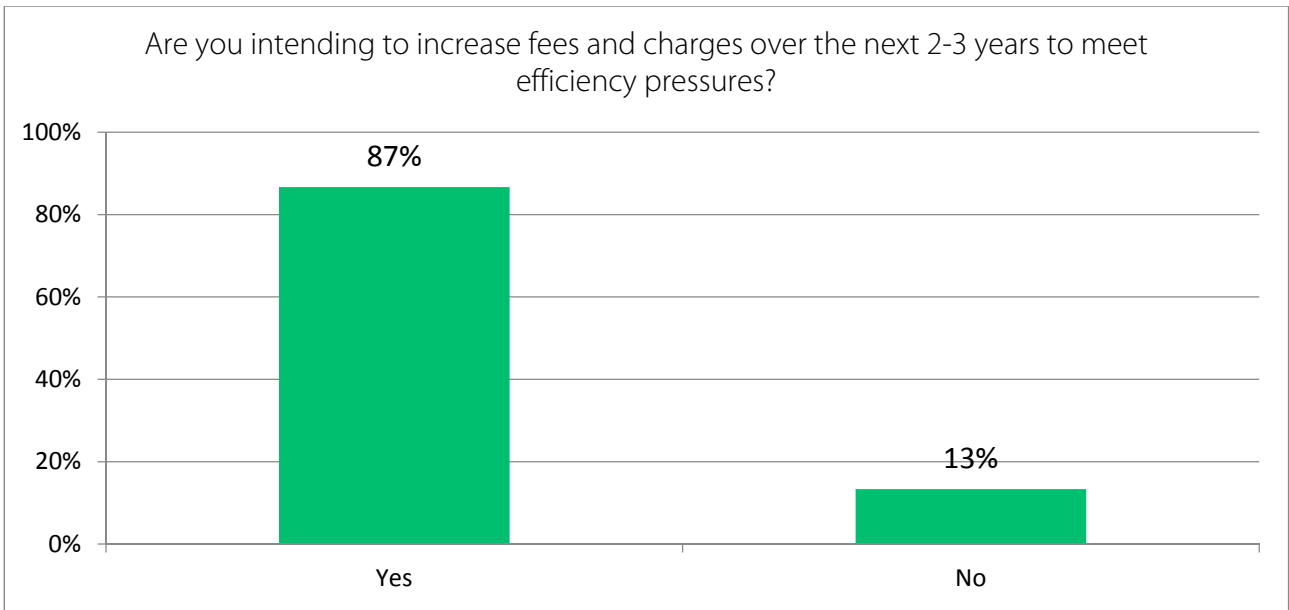
Notable changes since 2018 appear to show there is less income coming from cafes, conference and education centres. This is perhaps an area APSE will need to investigate in order to judge the success of such ventures. Not surprisingly there has been an increase in income coming from memorialisation but perhaps an area of improved income levels is via grazing which has shown almost a 50% increase in respondents reporting this as a source of income.

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

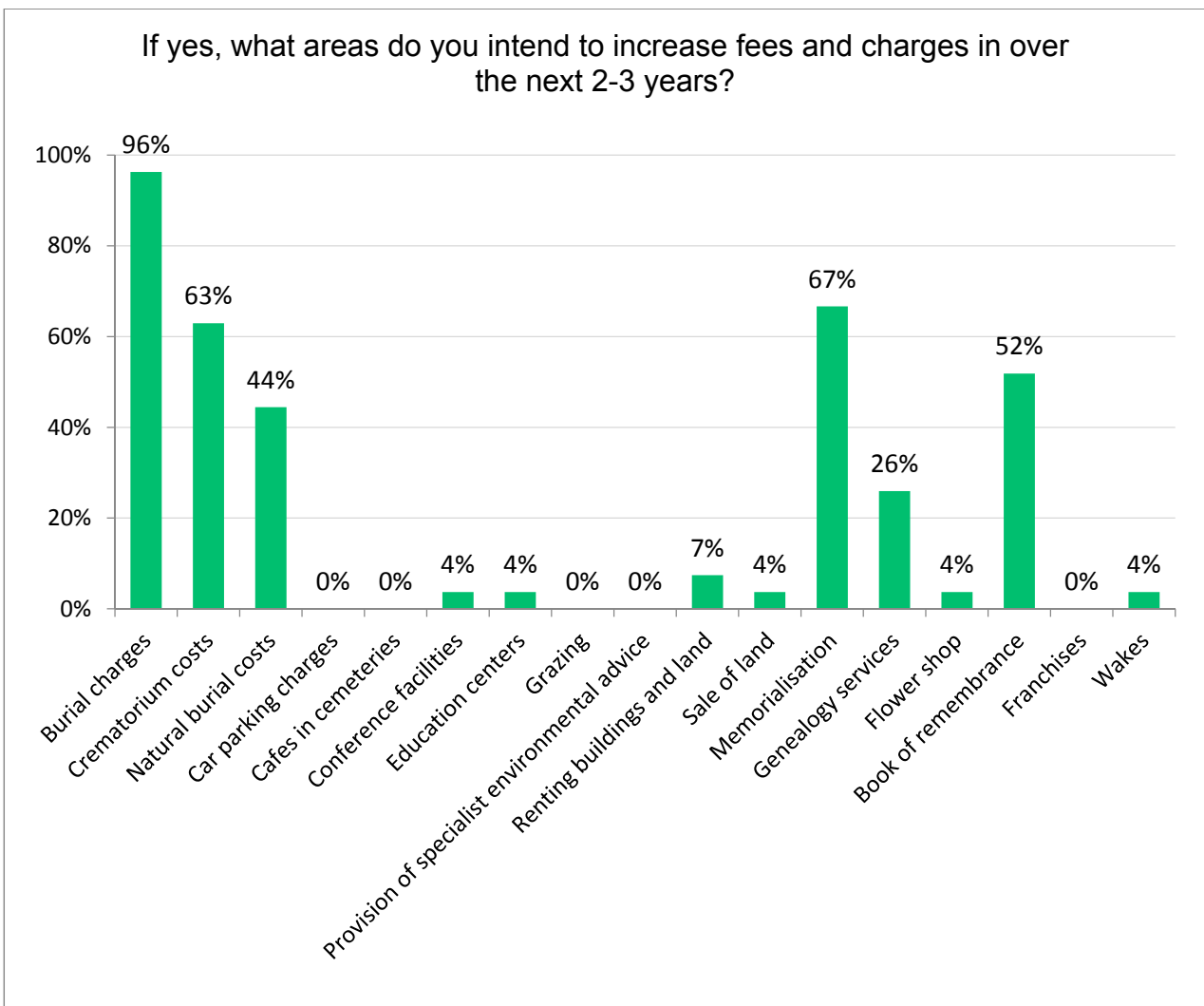
- We make income from memorialisation and genealogy and providing burial service to local parish council cemeteries
- Sports Pitches
- CAMEO mercury trading payments
- Provision of officer time in assisting other authorities to process Public Health funerals.
- Profit share with music partner.
- Pre-paid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

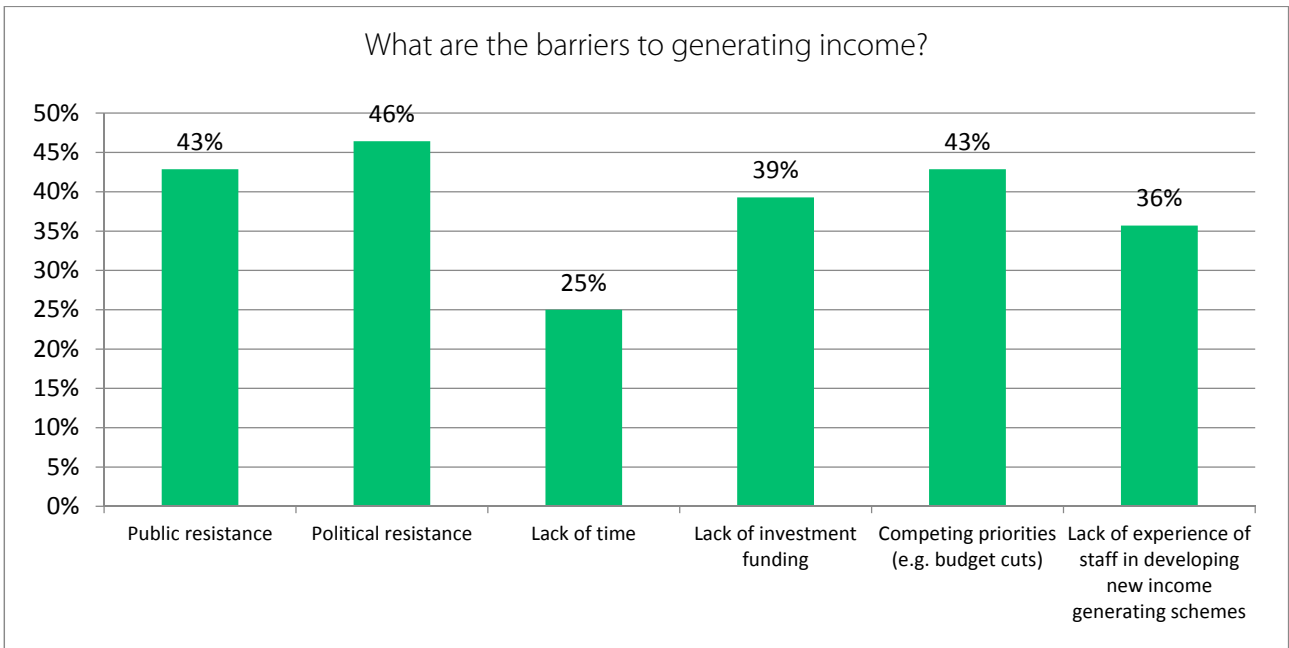
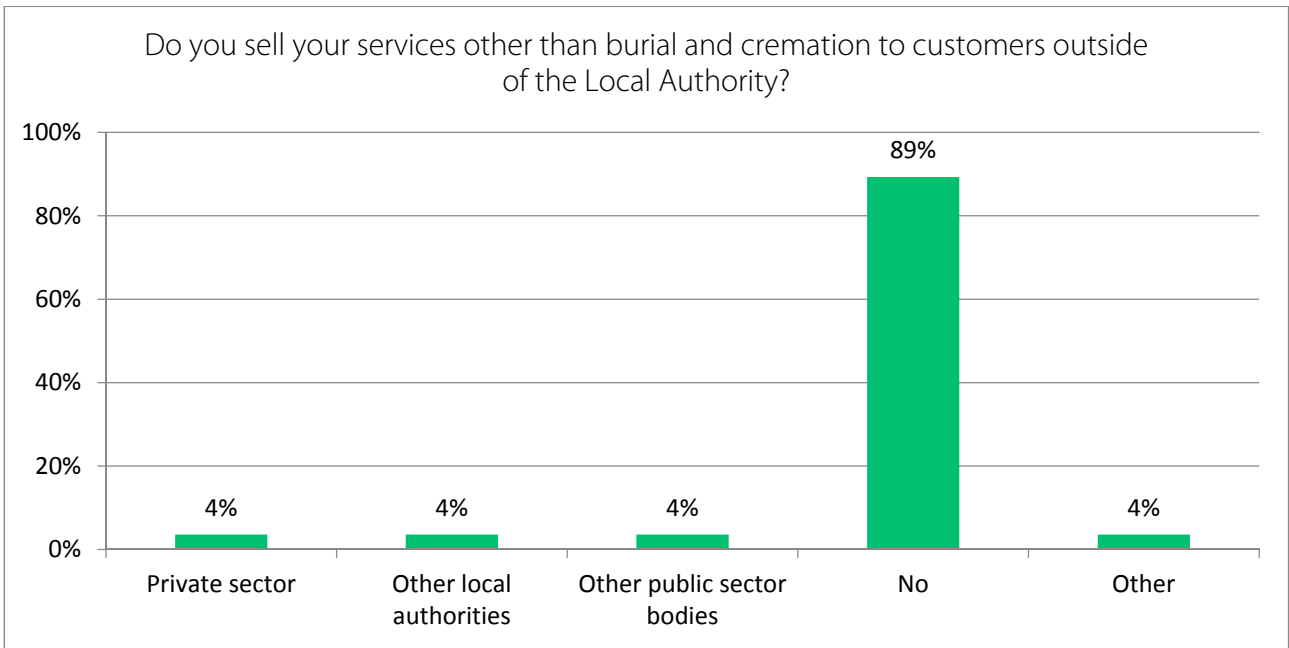
New additions for 2019

- Grave digging services for adjoining local authorities
- Leasing of memorials (benches, trees, rose bushes etc.)
- Creating a pets cremation offer.

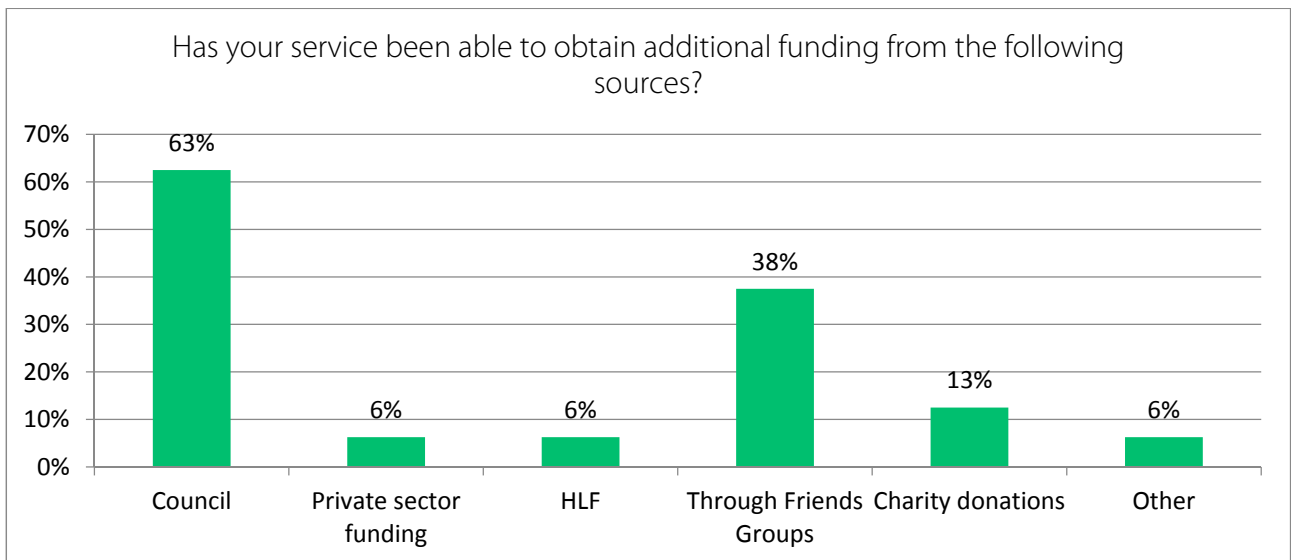


Based on 2018 results, 2019 has seen a 4% fall in the number of authorities intending to increase fees and charges.

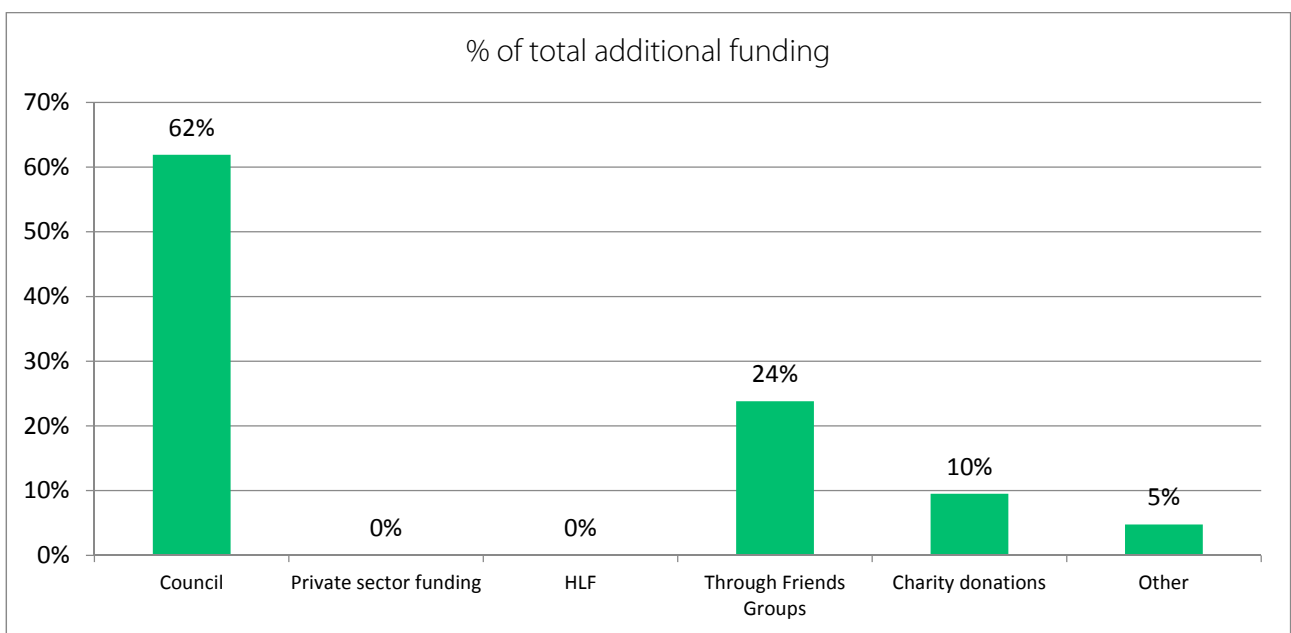




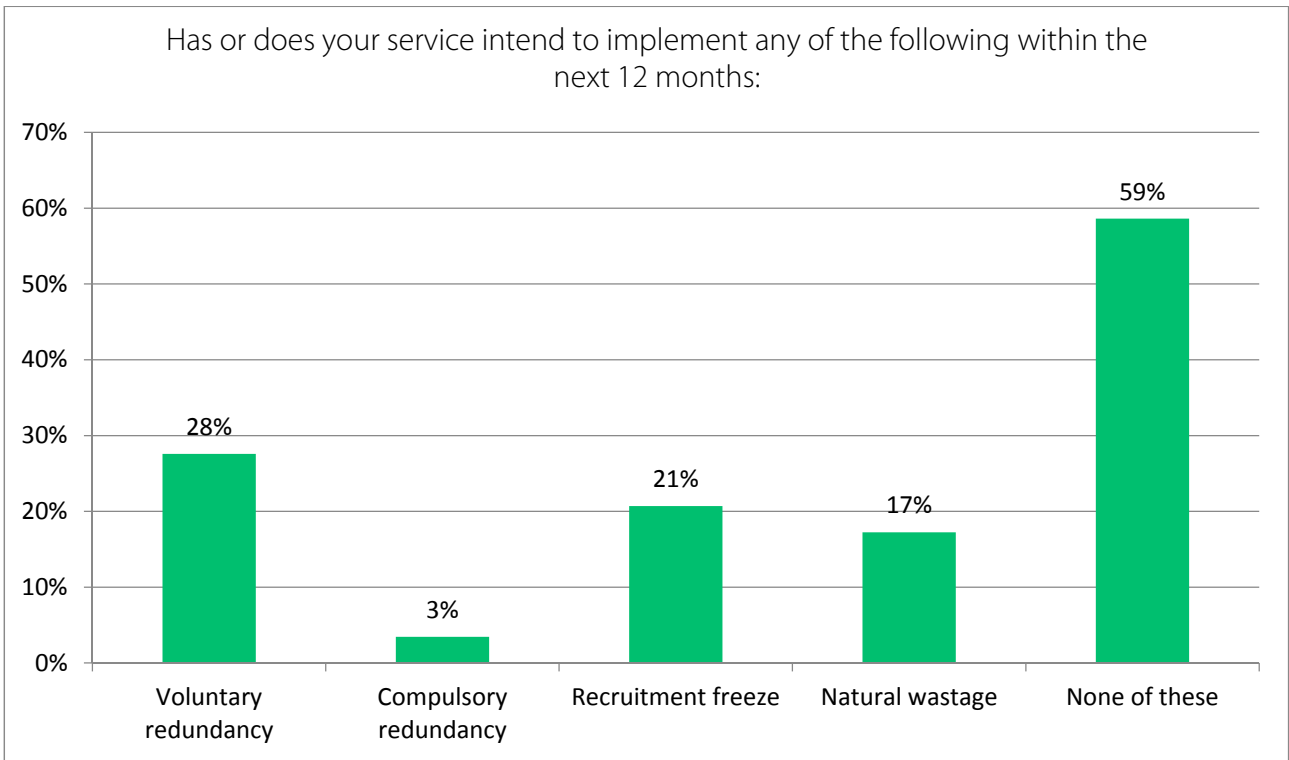
It is clear that because of the nature of the service and the fact many families are extremely vulnerable at the time of loss, it is still seen by many as unseemly to be generating income from the provision of additional services. Equally where income generation is pursued, it does appear there may be a clear need to train staff to look more closely at the services they provide regarding the development of new services to help generate additional income. What is noticeable however, is the reduction in respondents who stated political resistance is a barrier to income generation. In 2018, 57% of respondents stated political resistance was a barrier, whereas in 2019 this has fallen to 46%, a clear indication elected members are now acknowledging the importance of income generation to the sustainability of the service.



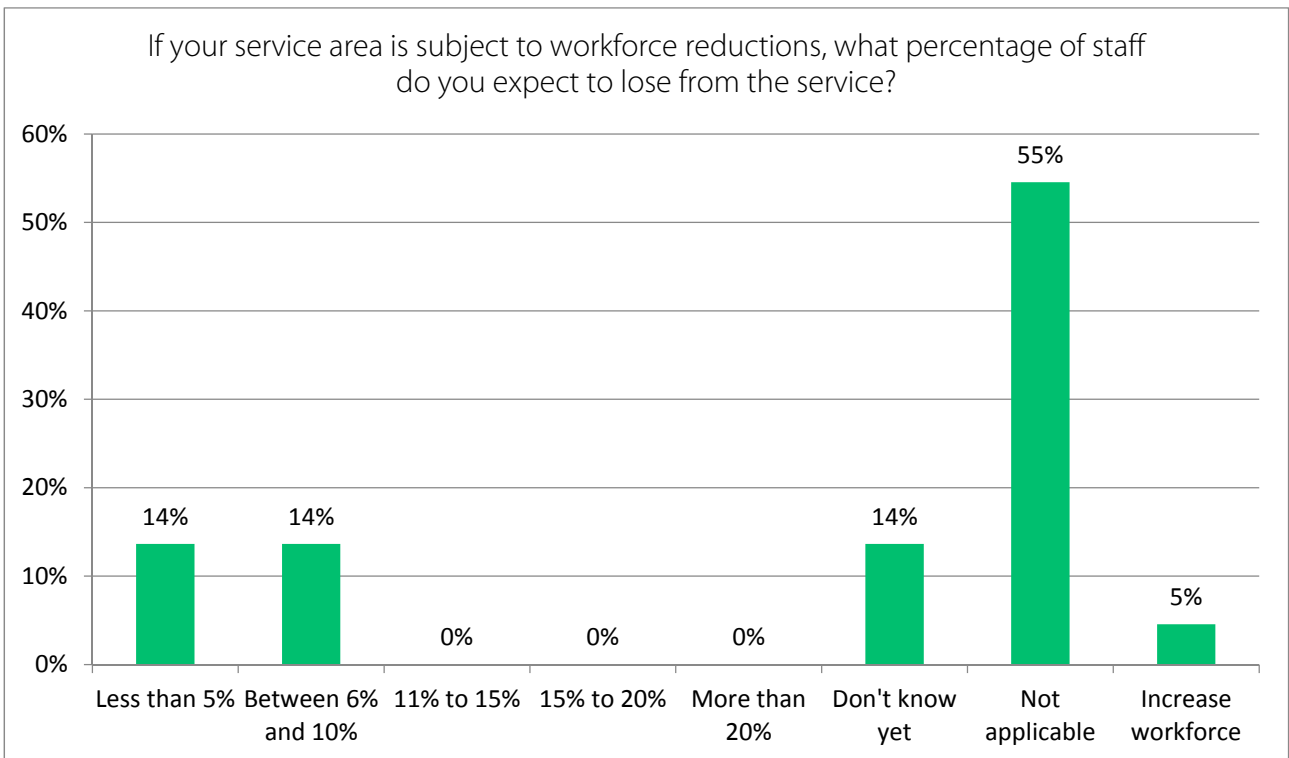
As in 2018, council funding is still the main source of additional funding (although there has been a noticeable fall in the number of respondents who have said they have been able to get additional funding). The most notable increase has been with regards to Friends Groups which are making an increasing level of contributions towards the maintenance and improvement of cemeteries and crematoria.



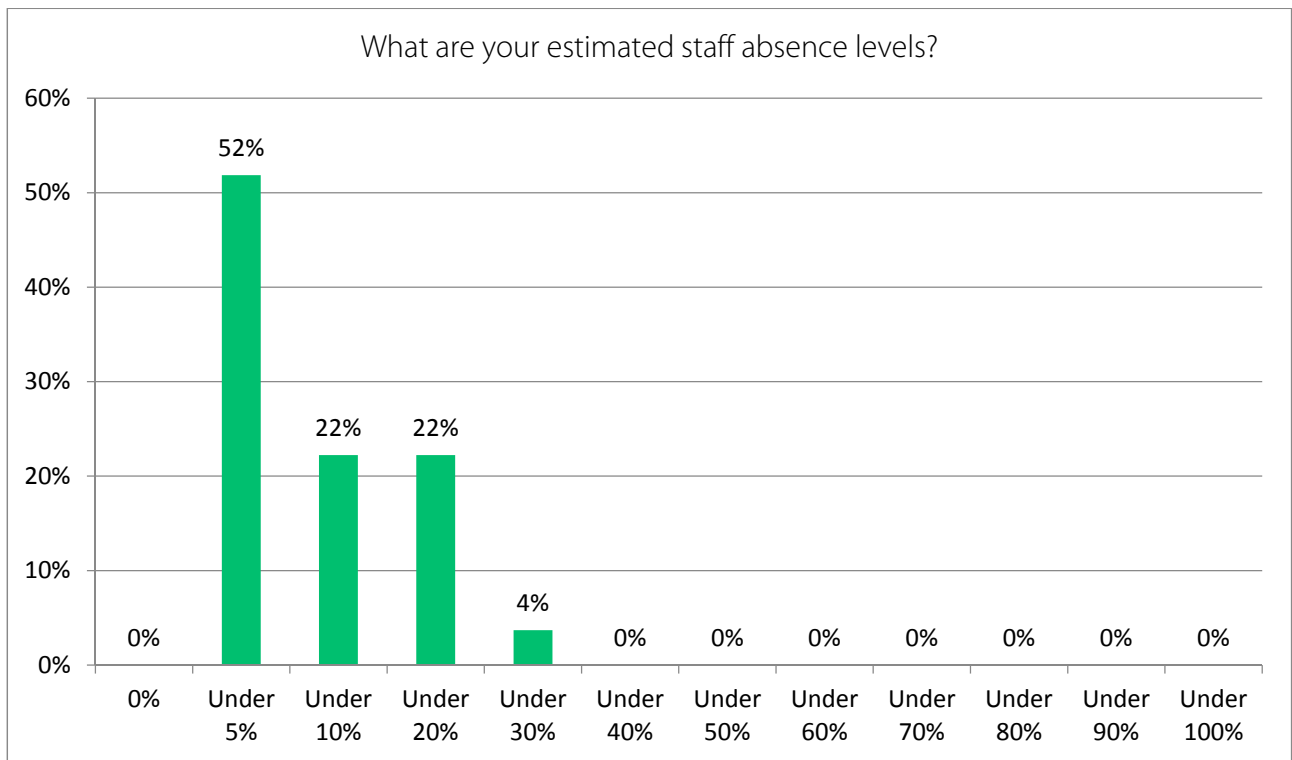
Regarding the ' % of additional funding ' graph above, there has been a significant shift in the value of additional funding coming from different sources. The amount of additional funding coming directly from the council has fallen from 87% in 2018 to 62% in 2019, whereas the proportion of additional funding coming from Friends Groups has risen from 10% in 2018 to 24% in 2019, amplifying the importance of the contributions Friends Groups are making towards the upkeep our cemeteries.



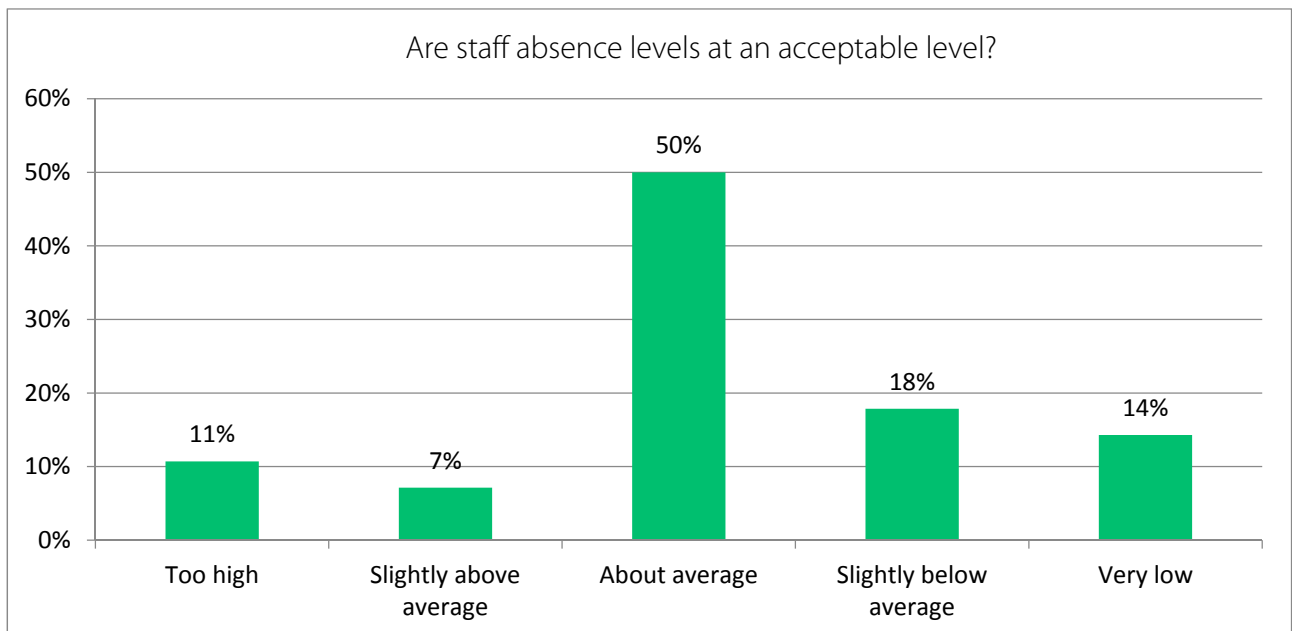
It is perhaps heartening to note compulsory redundancy is a path only a few of respondents are looking to go down, although in 2018, none of the respondents were looking at this as an option. Voluntary redundancy as an option has risen significantly with 28% of respondents stating they are considering this, as opposed to only 9% in 2018. With regards to staffing levels over the next 12 months, 59% of respondents declared they were not looking to lose staff.



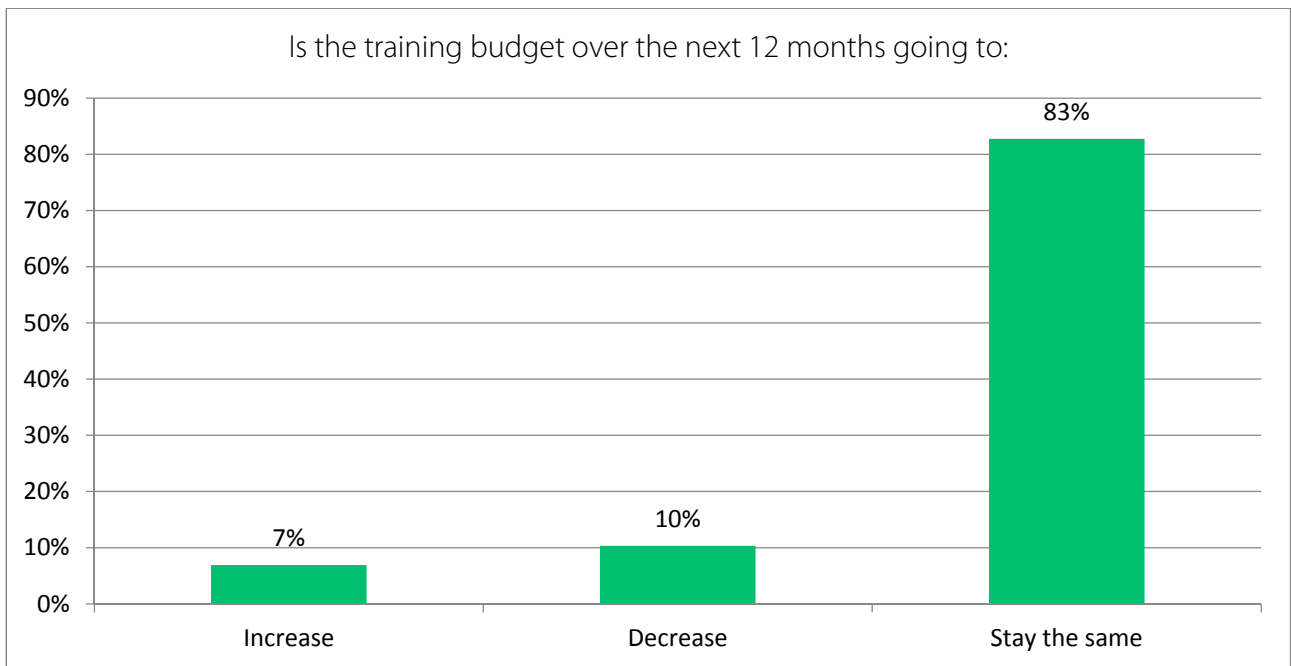
There has been little change on 2018 results although there has been an increase in the number of respondents who are expecting to lose 6-10% of their staff numbers in the coming 12 months.



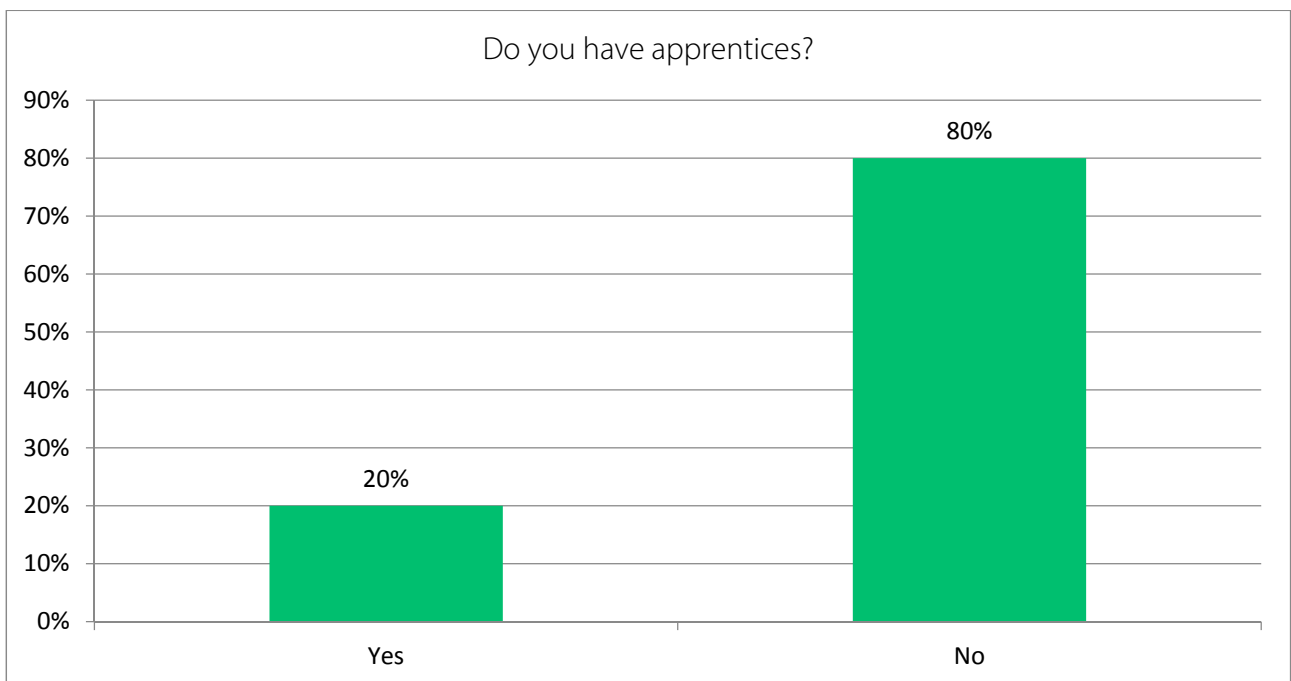
The largest increase has occurred in the number of staff absence levels at under 5%, and reductions have also occurred in under 10% and under 30% which shows an improvement in staff absence overall, but it should be noted increases have occurred in those reporting staff absence levels of under 20%.



Regarding staff absence levels, it does appear that the concern about sickness levels in 2018 when 68% recorded levels of acceptable to too high, has been resolved, with over 80% recording sickness levels of acceptable to very low in 2019.



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. 2019 sees 83% keeping their budgets the same as opposed to only 73% staying the same with higher levels of budgets reductions also being recorded – 16% in 2018 as opposed to 10% in 2019.



Worryingly the number responding positively to having apprentices has fallen from 27% in 2018, to 20% in 2019.

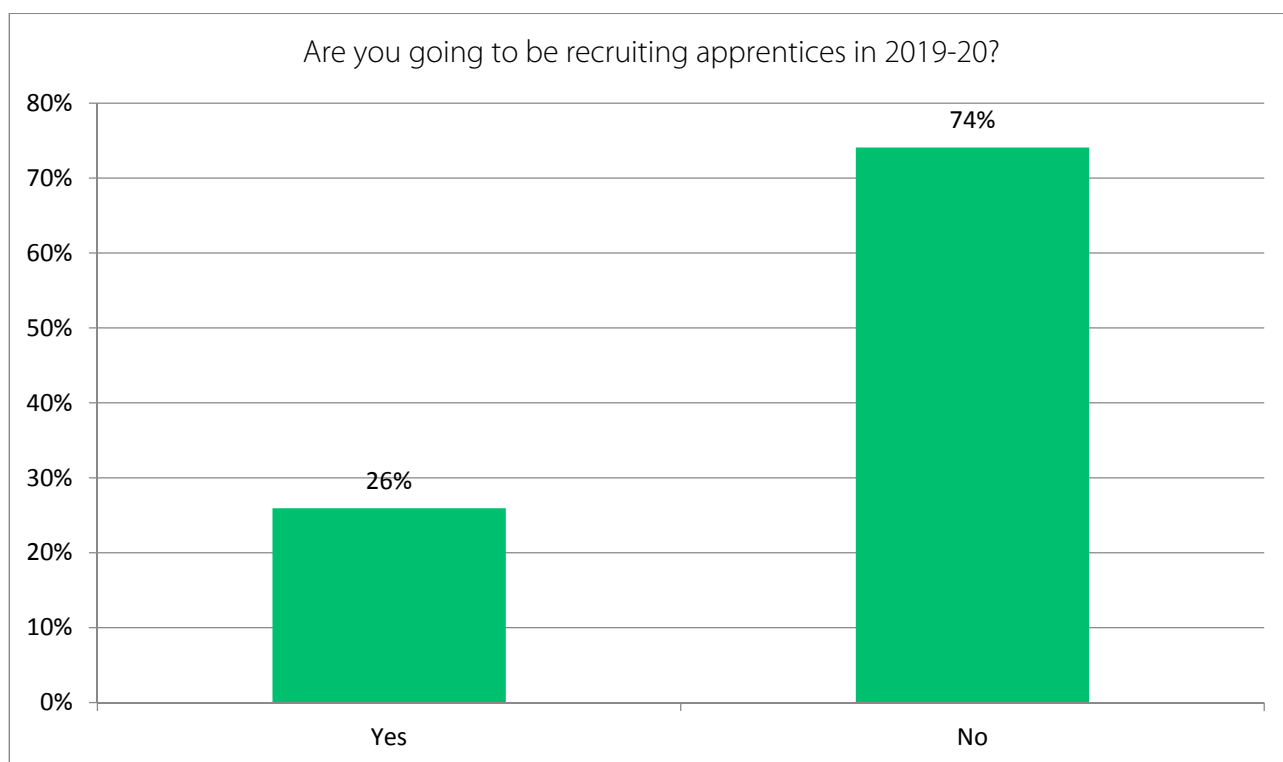
Are you retaining all apprentices from the last recruitment round? If not, why?

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.

Additional comments received in 2019 included:

- Any vacant posts will be filled by redeployed staff rather than by apprentices.

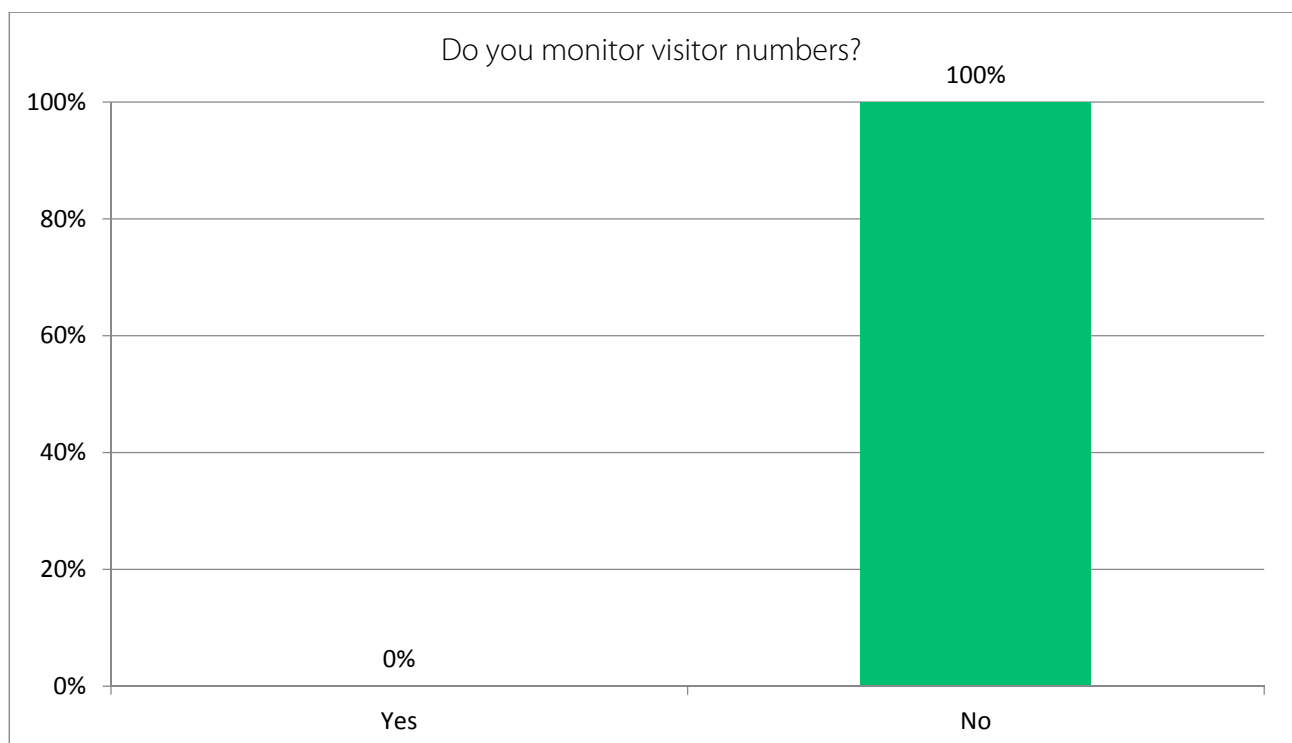
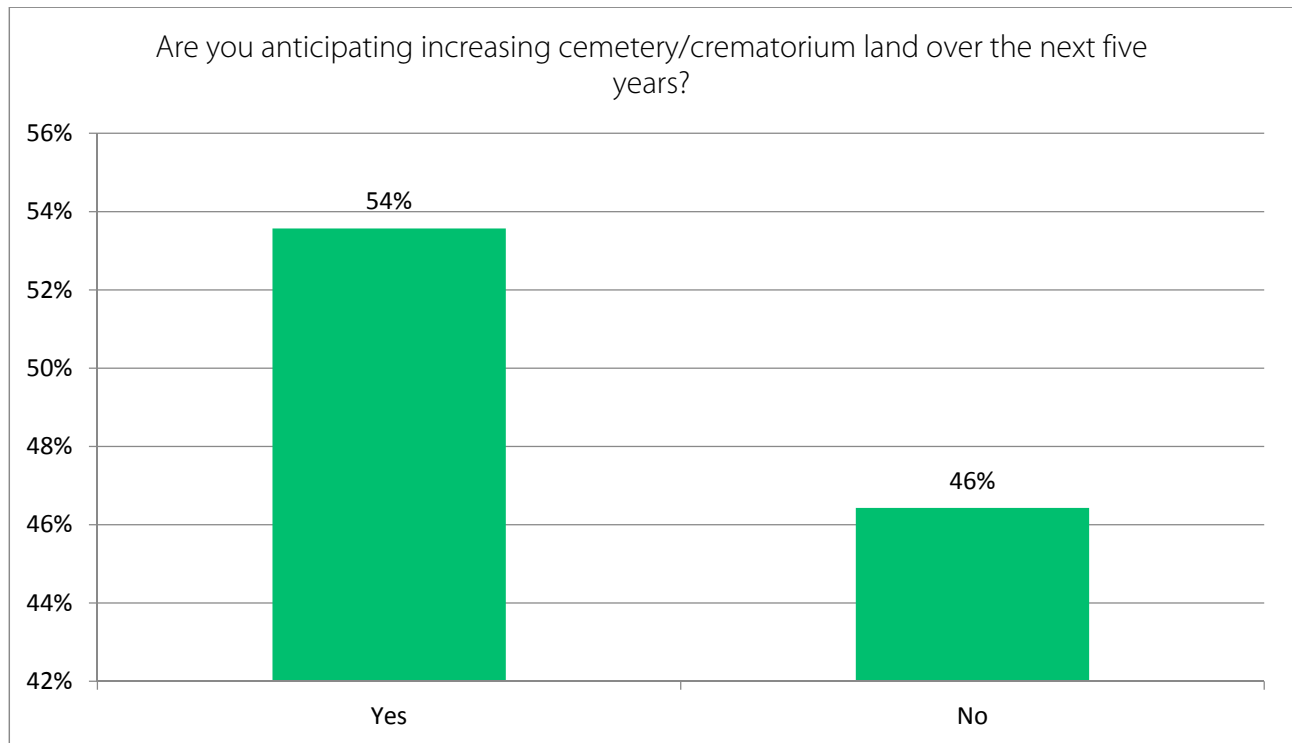


It is noticeable compared with the results for 2018 regarding those authorities responding that they did employ apprentices, there has been a decrease in those responding that they will employ apprentices from 35% in 2018 to 26% in 2019.

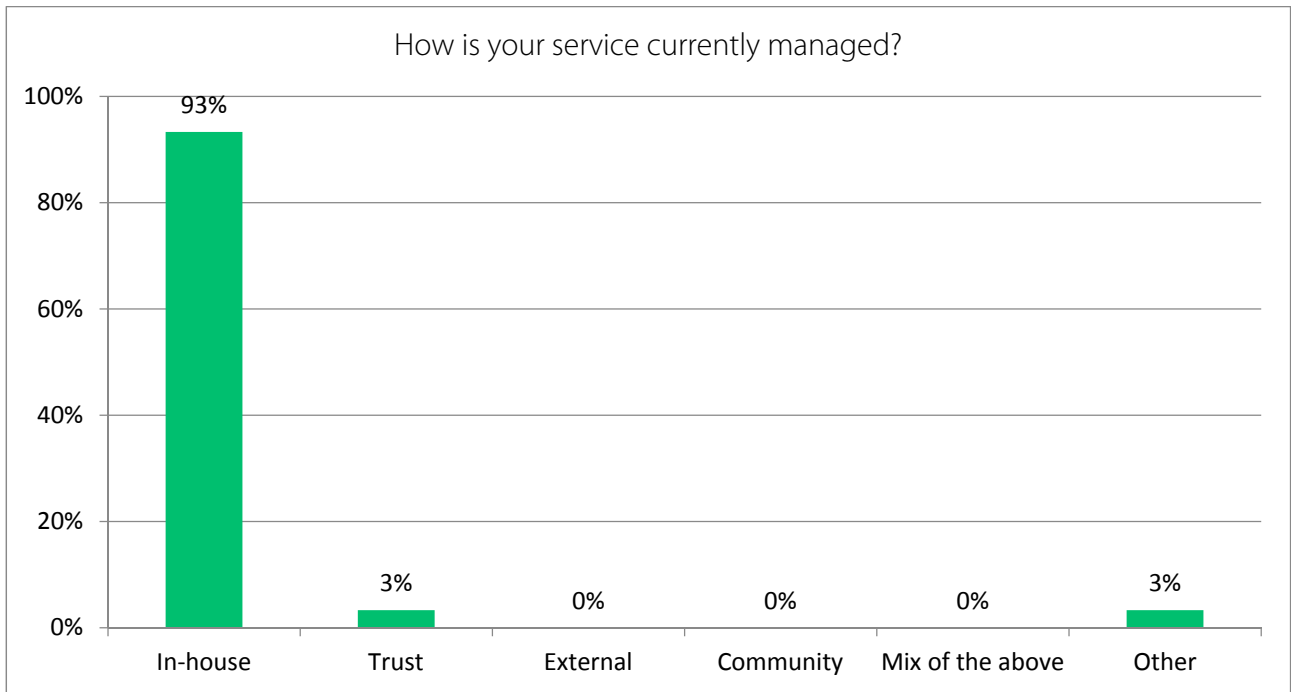
How many cemeteries does your authority manage?

The following results were received:

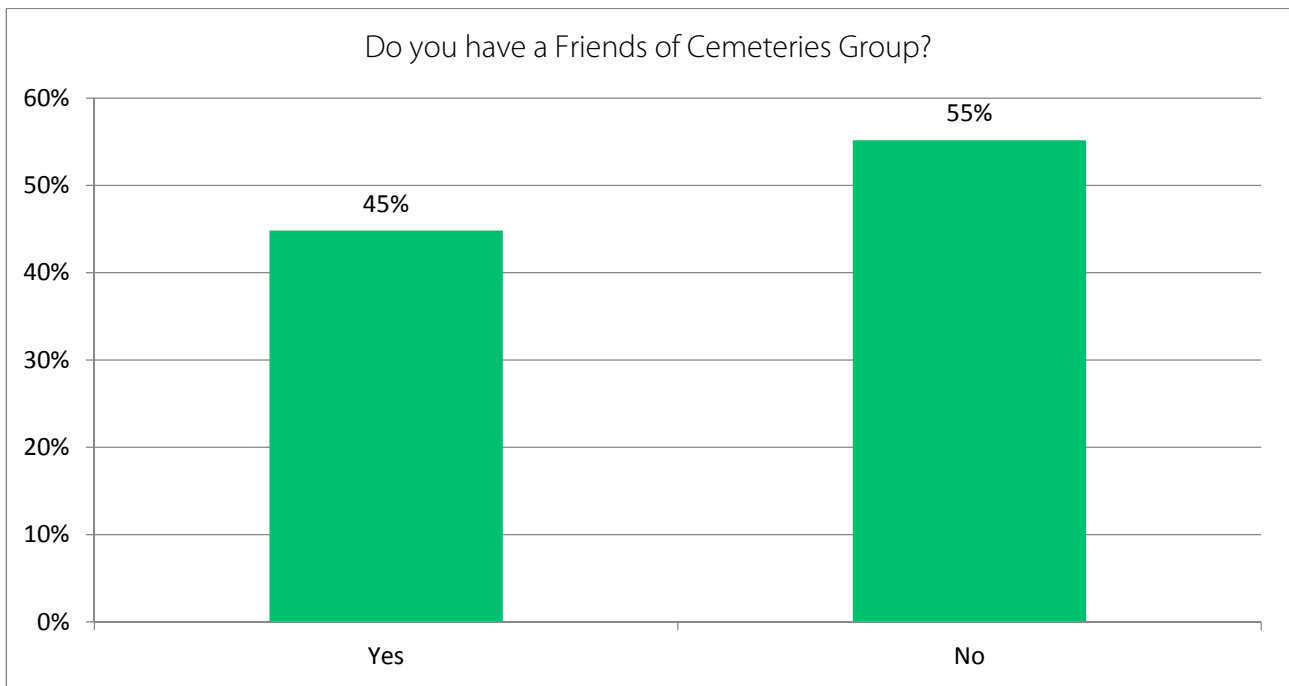
Most local authorities who replied managed between one and ten cemeteries (74%). 11% managed eleven to twenty cemeteries, whilst 15% managed over 21 cemeteries.



Interestingly no respondents 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.



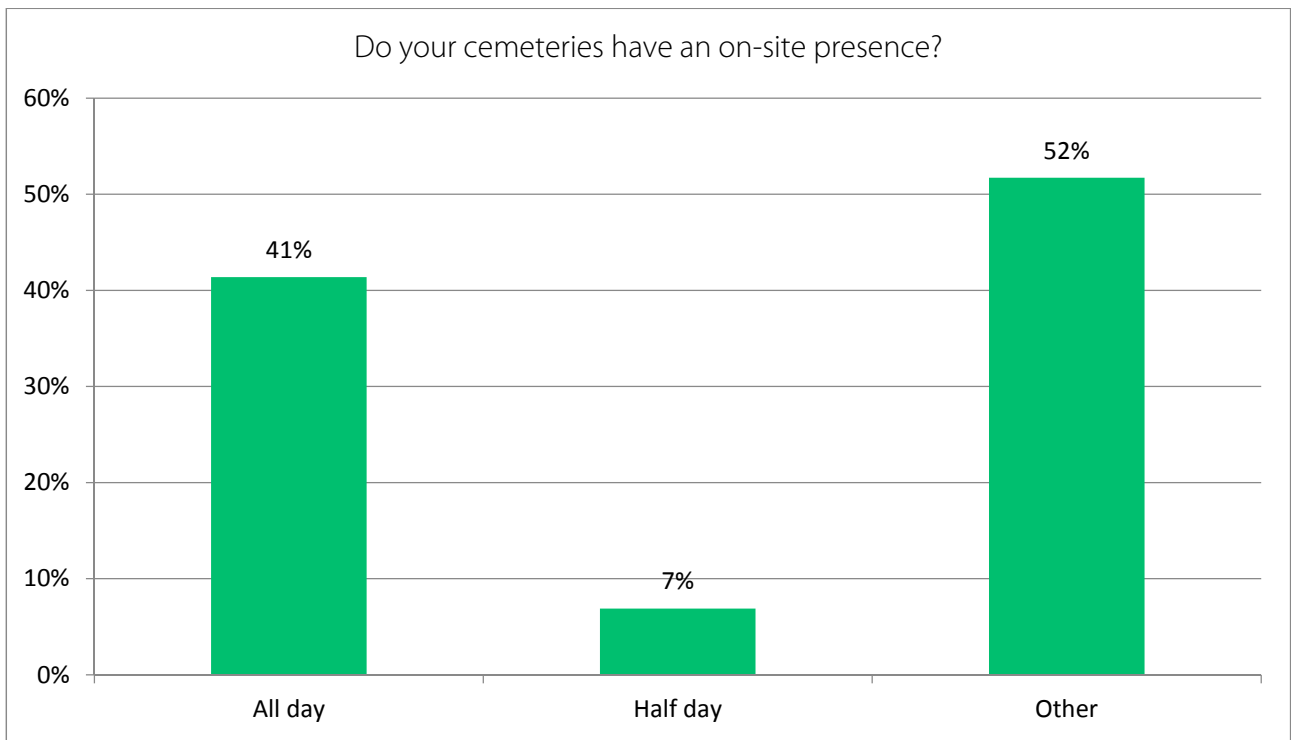
From the above two graphs the future provision of Bereavement Services does appear to be remaining firmly in control of local authorities. 2019 has seen a slight increase in the number of services managed in house, from 91% in 2018 to 93% in 2019. Equally over the next few years again more councils anticipate that services will be managed in-house, in fact in 2018 this figure was 86% whereas the figure for 2019 has risen to 93% showing a growing commitment to in-house delivery.



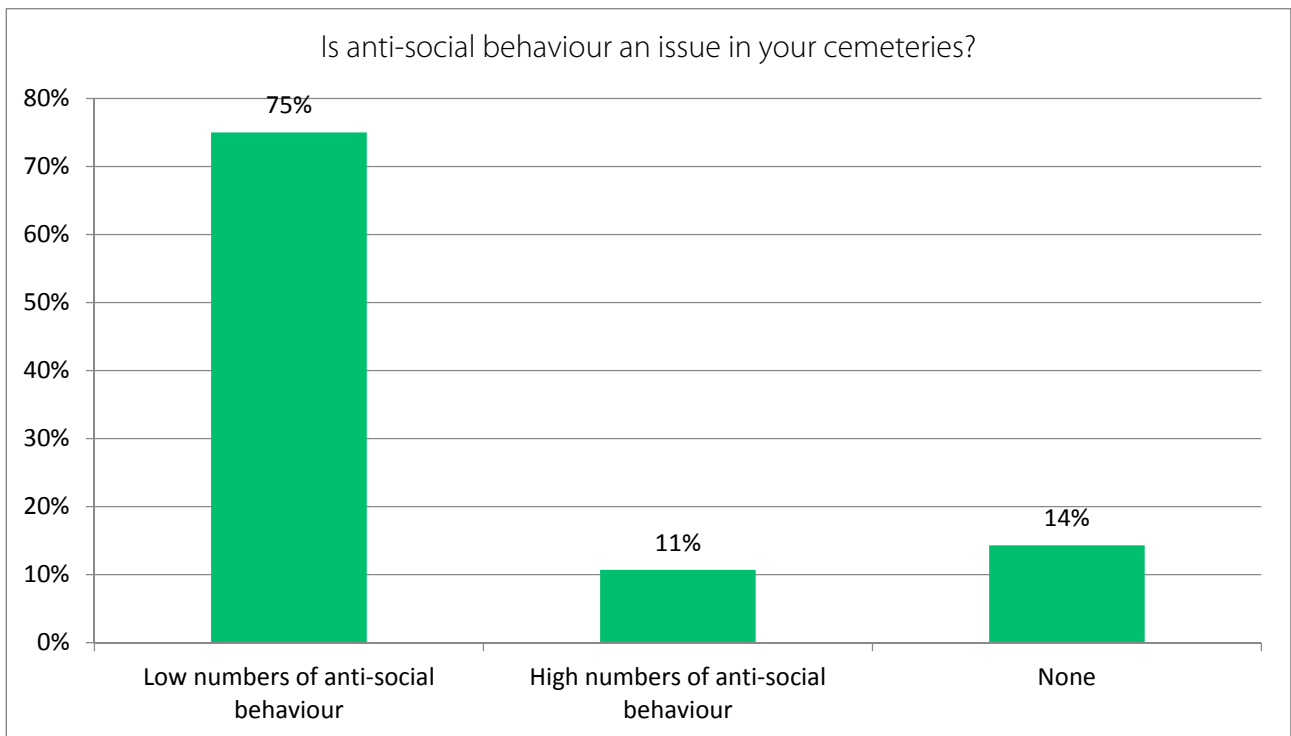
Almost half of local authorities now have a Friends of Cemeteries Group which supports their Bereavement Services. Whether this support be strategic, operational or financial, the role of such groups seems to be coming common place across a number of local authority services and appear to be increasing year on year.

If you have a Friends of Cemeteries Group, 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



Since 2018 there appears to have been an increase in the number of local authorities which have an all day presence in their cemeteries (30% 2018, 41% 2019), possibly as a response to ensuring visitor safety against the threat of anti-social behaviour and also as a result of the growing number of Friends Group who often provide on-site presence through the works they carry out.

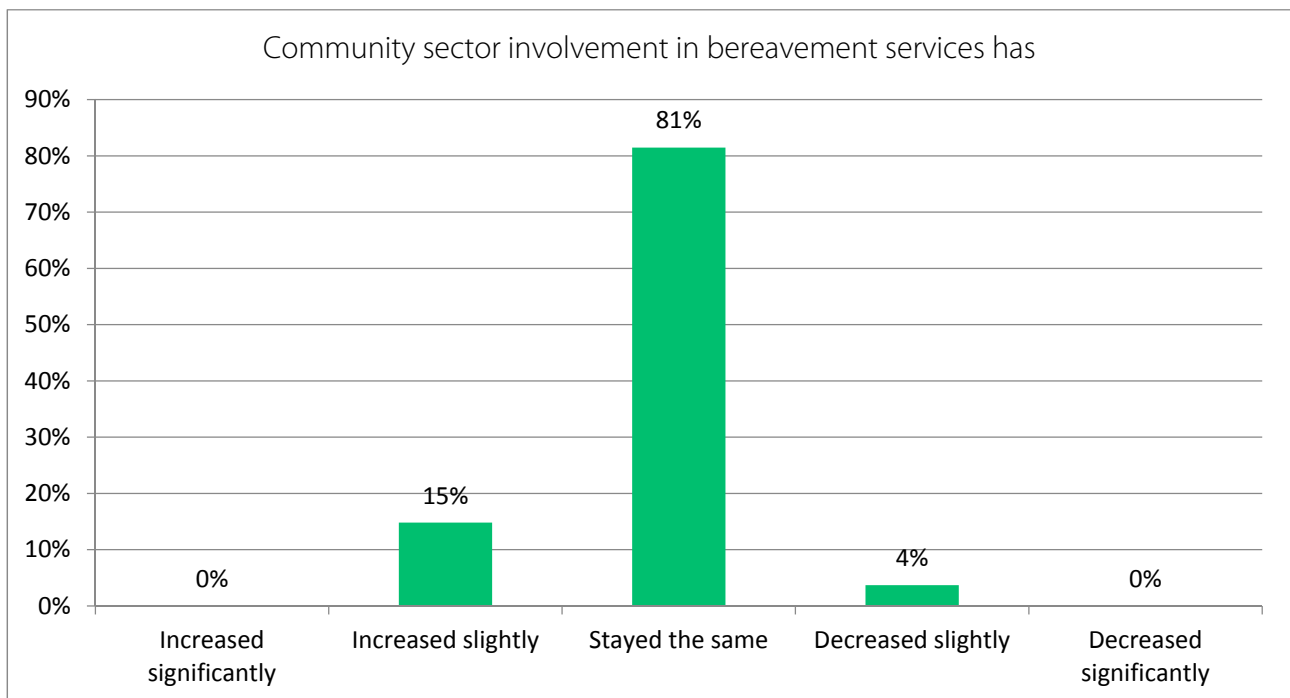


If yes, please give a brief description of any incidents

Although it appears incidents of anti-social behaviour in cemeteries are relatively low, but there has been an increase in the number of high numbers of anti-social behaviour reported, but these may be confined to a small number of cemeteries with specific problems.

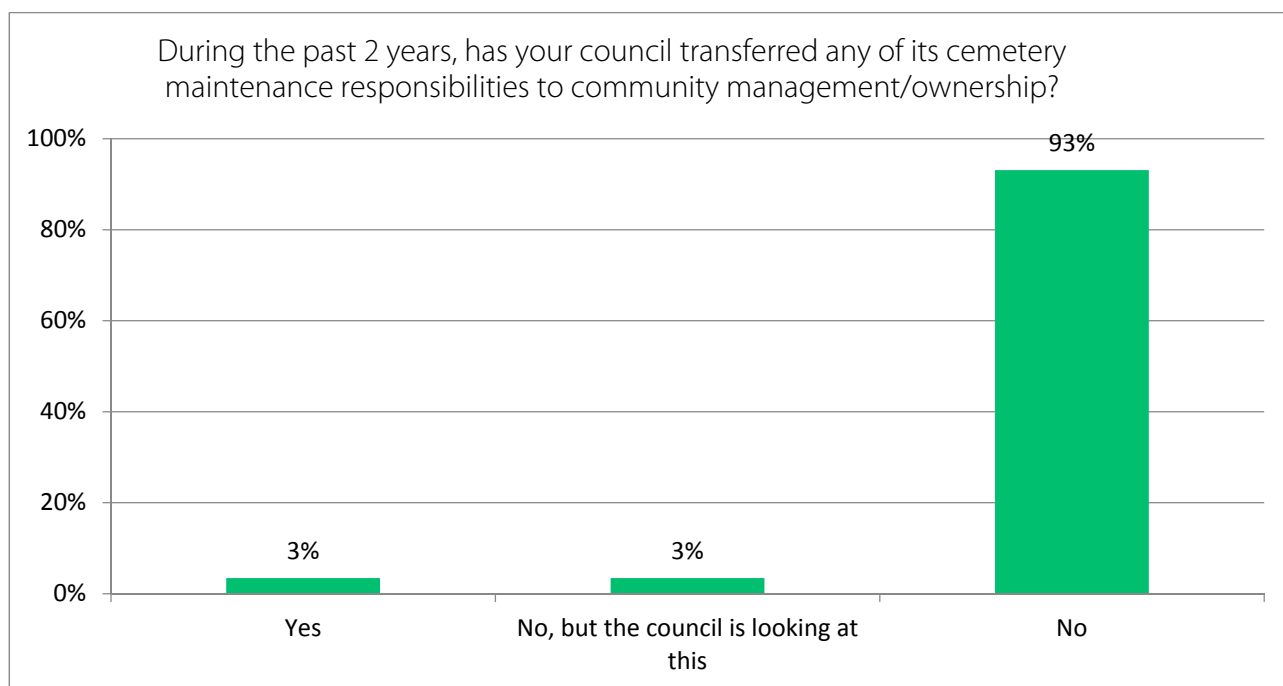
Incidents which seem to be common across all respondents, include:

- 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-authorized access



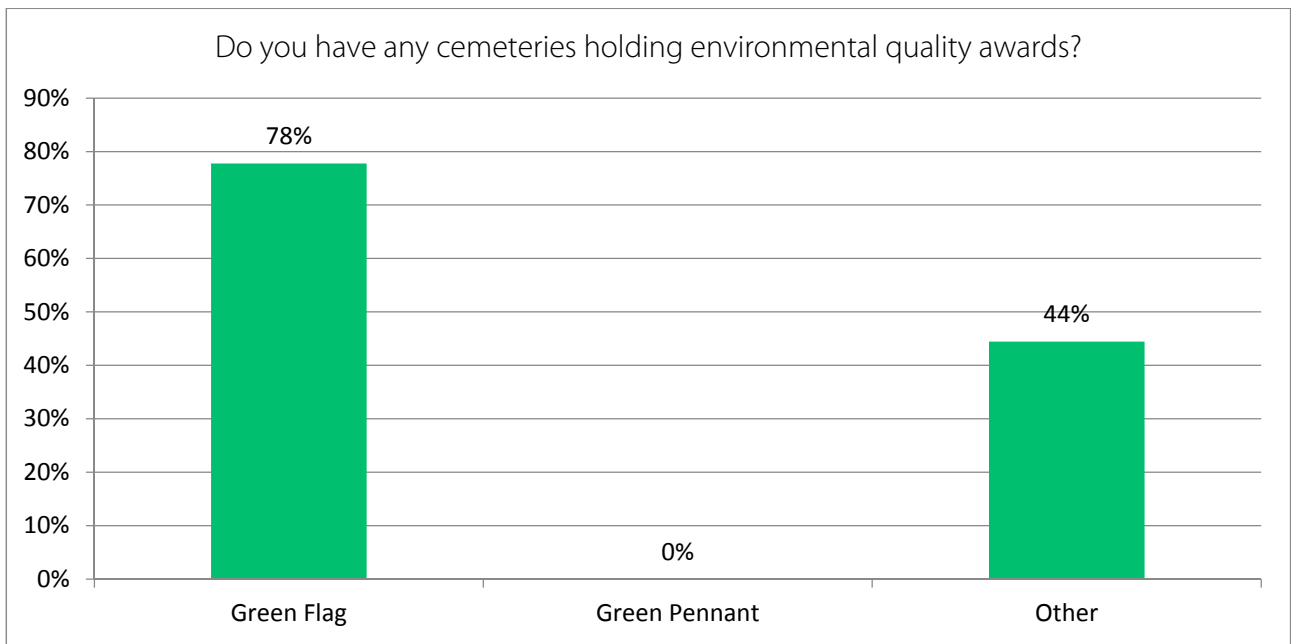
If yes, in what areas is this increasing?

- 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

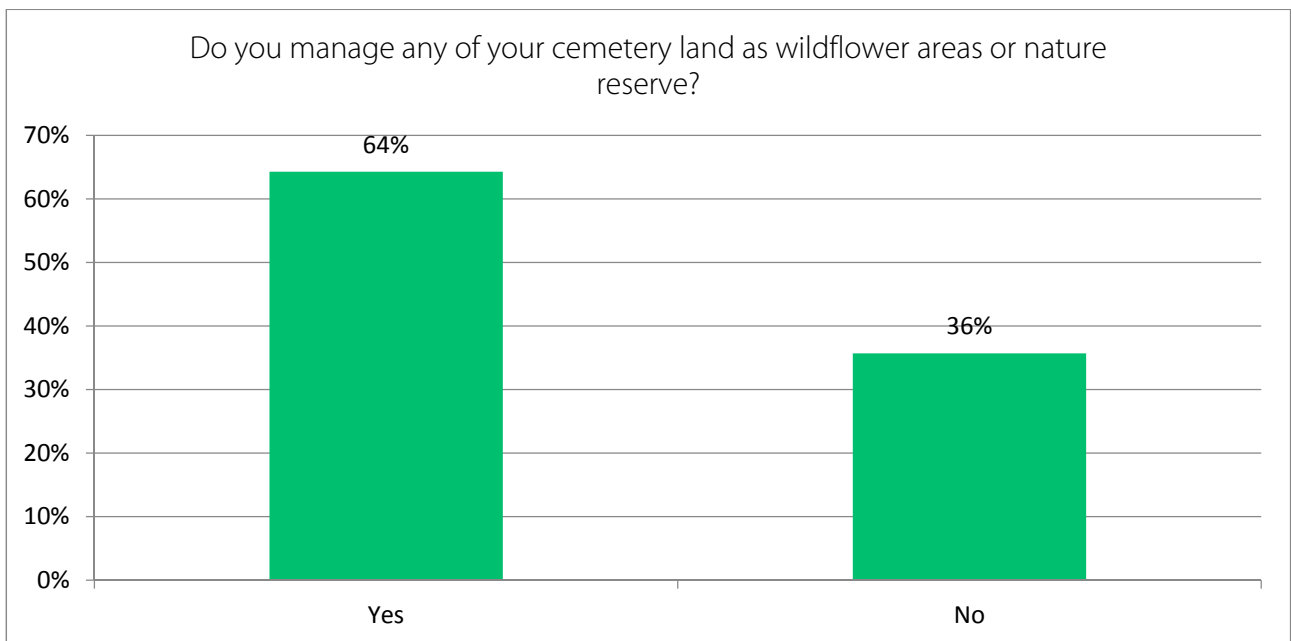


If yes, what elements have been transferred to community management/ownership?

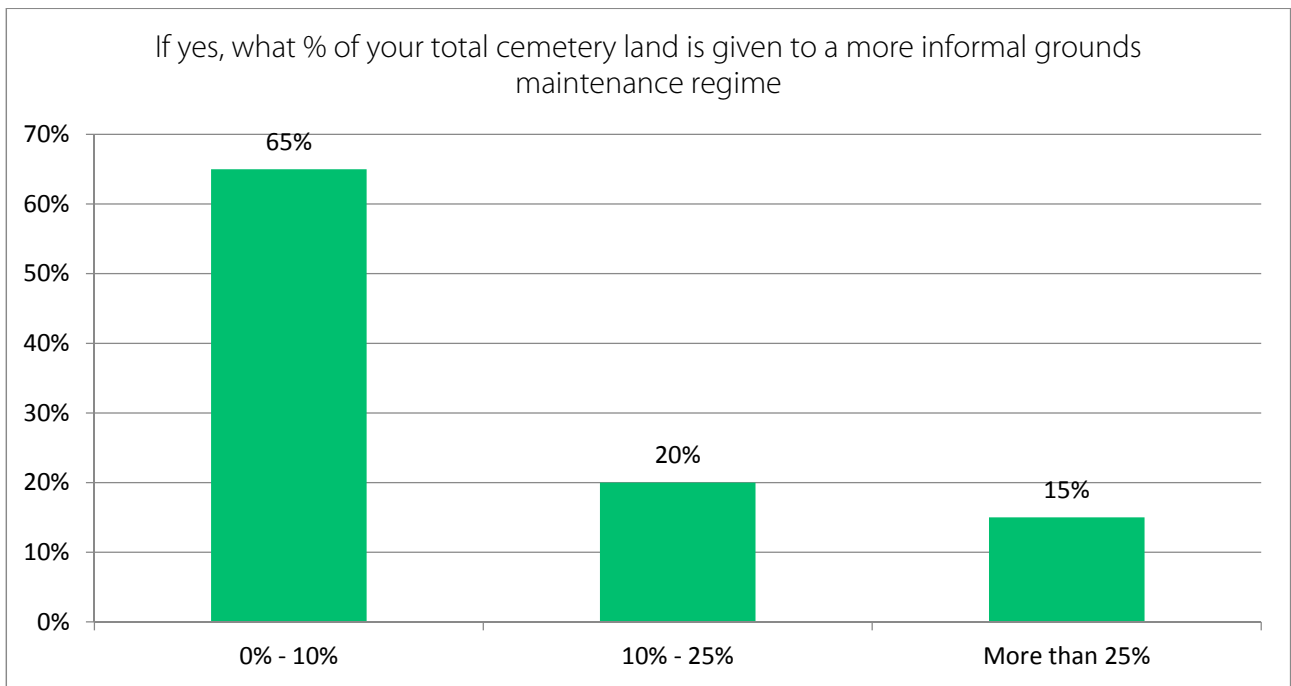
This still appears to be a very rare occurrence, as the only previous example given was from a single response in 2018 which stated that the council had transferred grounds maintenance for one of its cemeteries to community management.



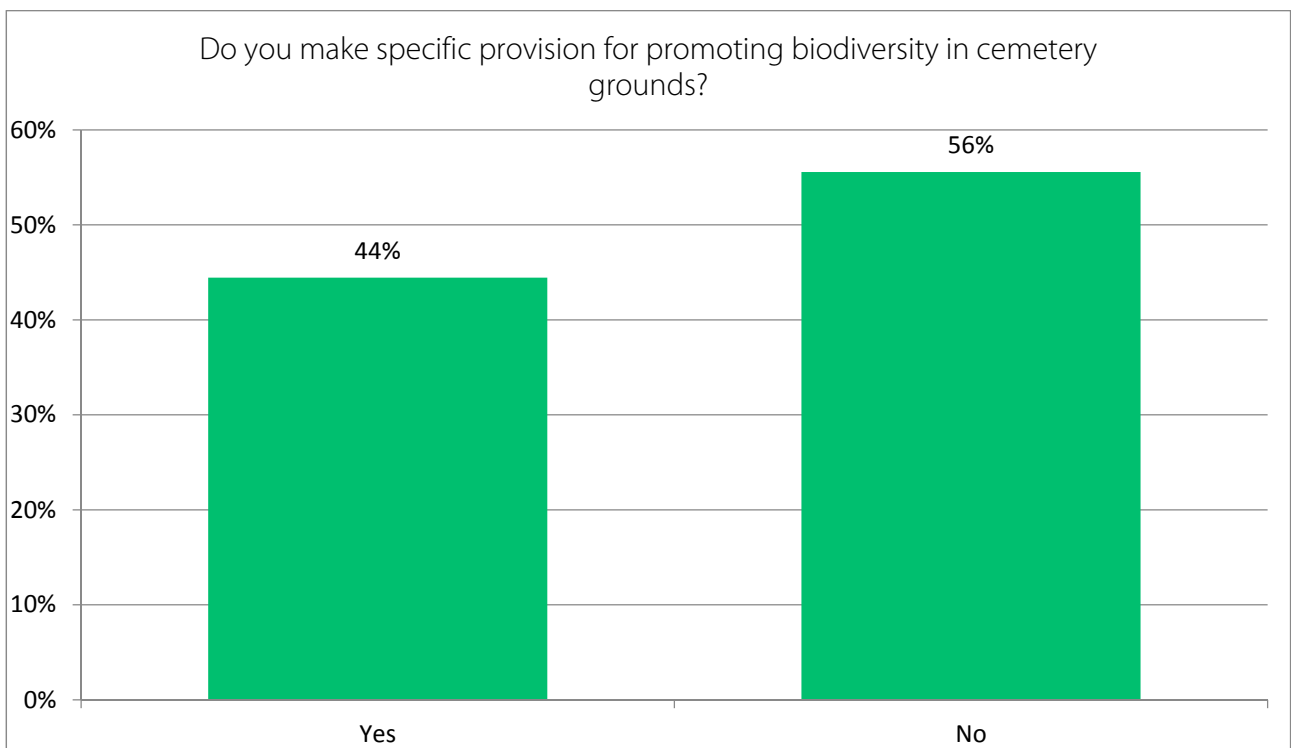
This improved result is welcome (71% in 2018), as many of our cemeteries are the only greenspaces to which many people have access. In addition well-kept grounds are a clear signal to visitors that their loved ones final resting places are being well cared for.



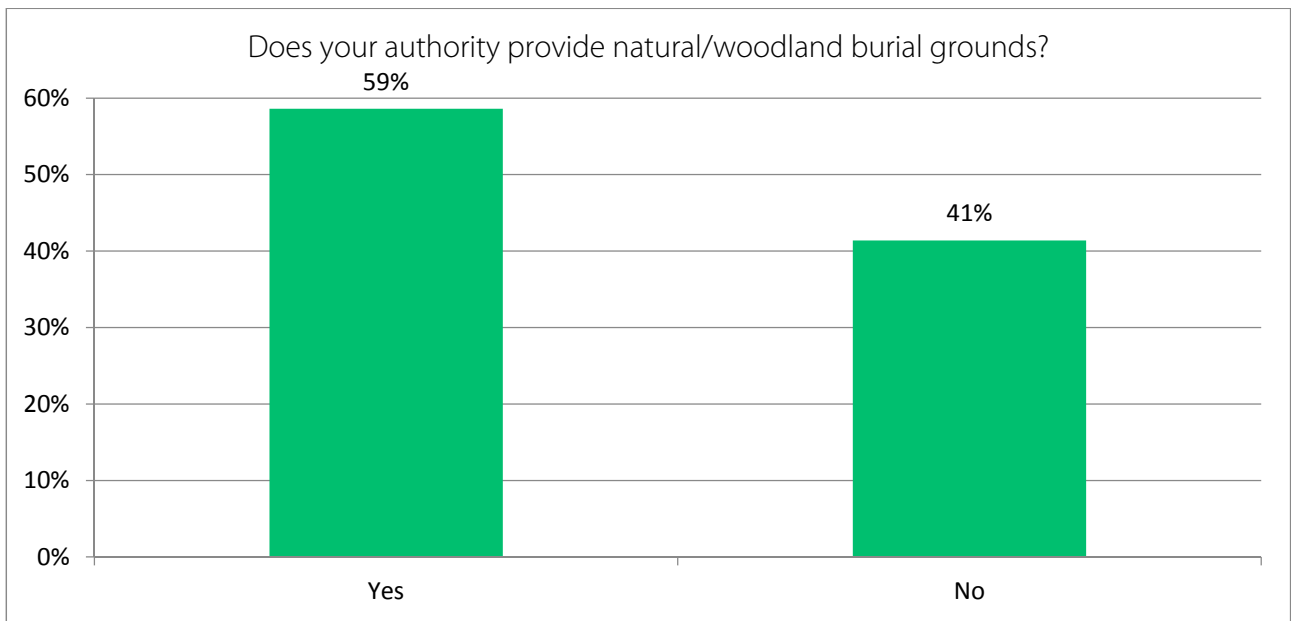
This year has seen a 6% increase in respondents stating that they manage areas of their cemeteries for wildflowers or nature reserves. Many areas of older cemeteries are now being managed in a way which provides both an aesthetically pleasing appearance for cemetery visitors, but also provide havens 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 increasingly incorporating informal grounds maintenance as an option, particularly within the older, less well visited areas of their cemeteries. It is important that visitors 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.

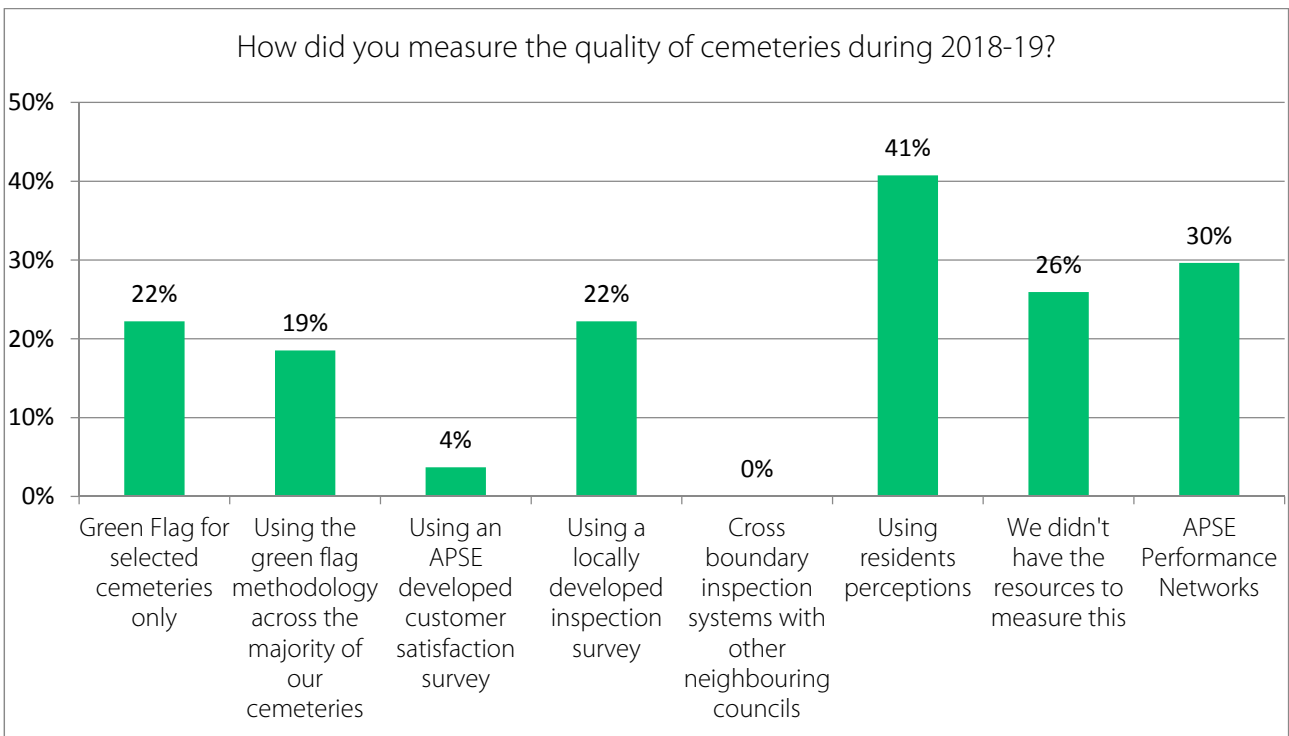
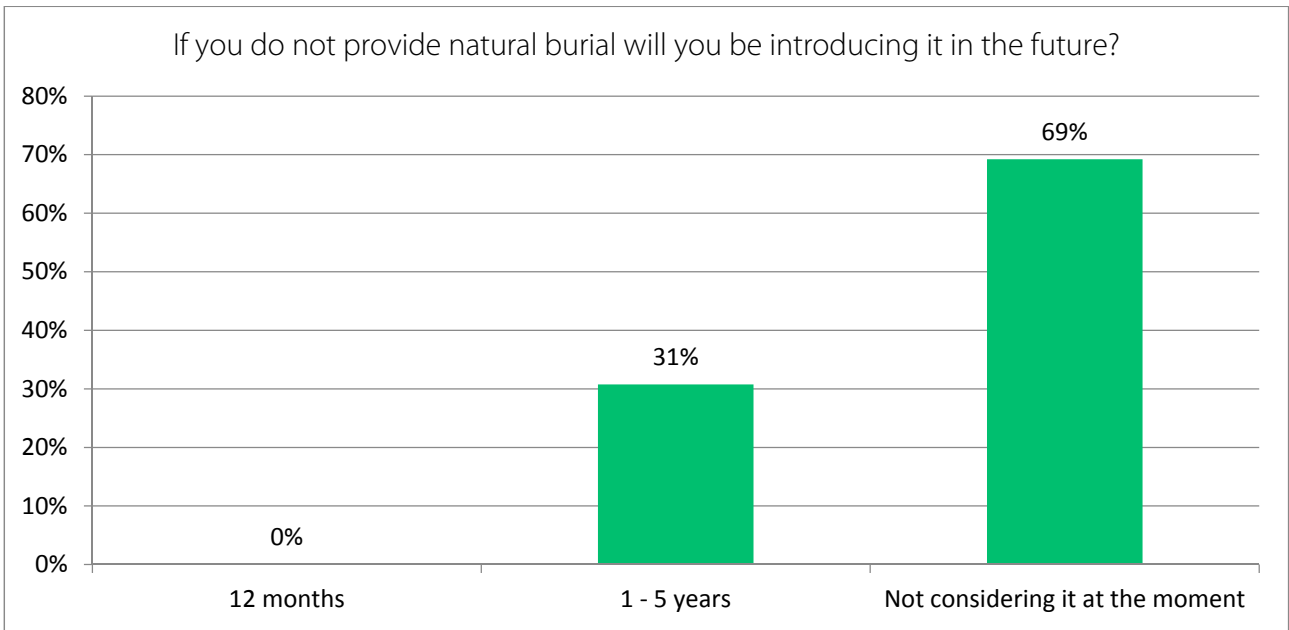


The use of natural/woodland burial is obviously growing in popularity (44% in 2018 as compared to 59% in 2019), and many local authorities are now adopting this practice in order to provide an alternative to traditional funeral practices. It should be noted however that the quality of such areas is still 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.

[Natural burial ground: guidance for operators](#)

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

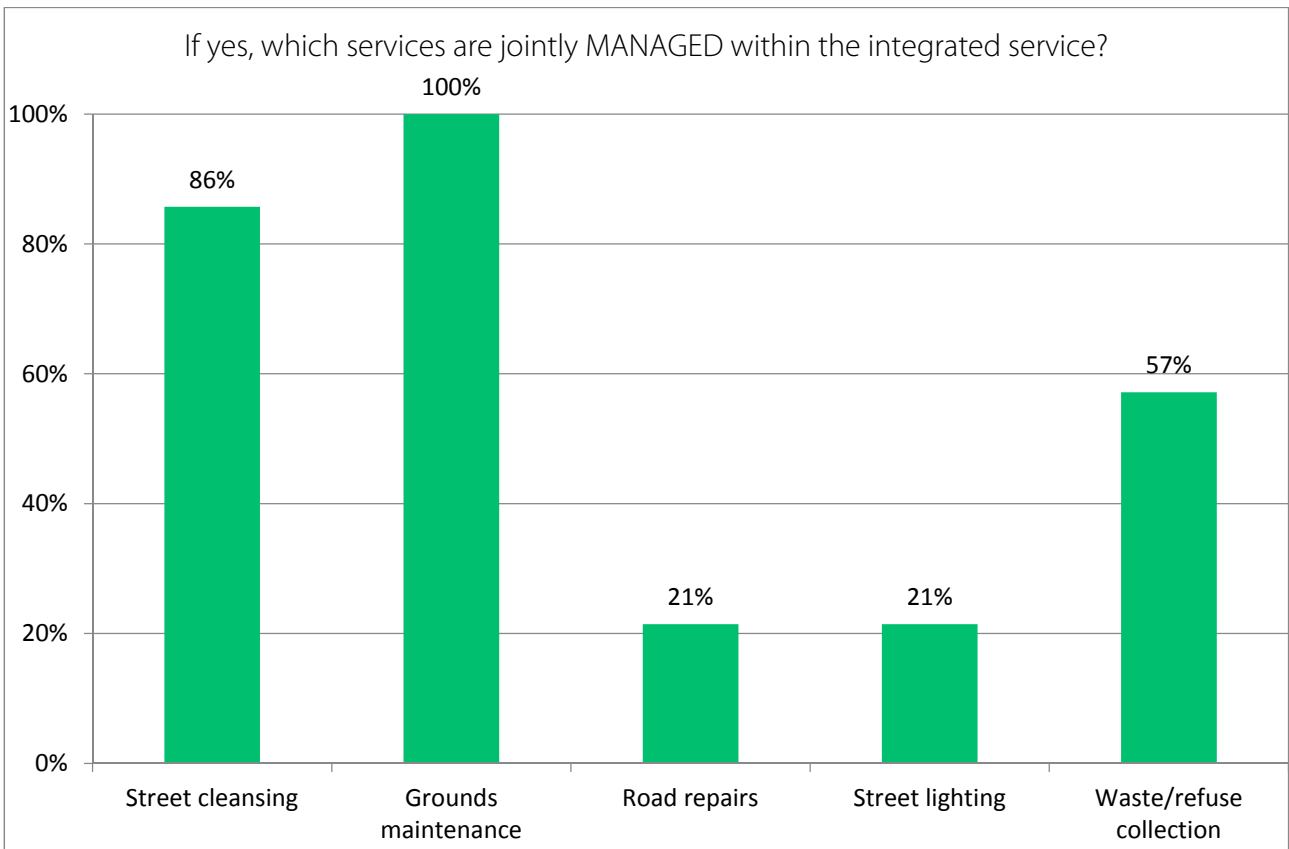
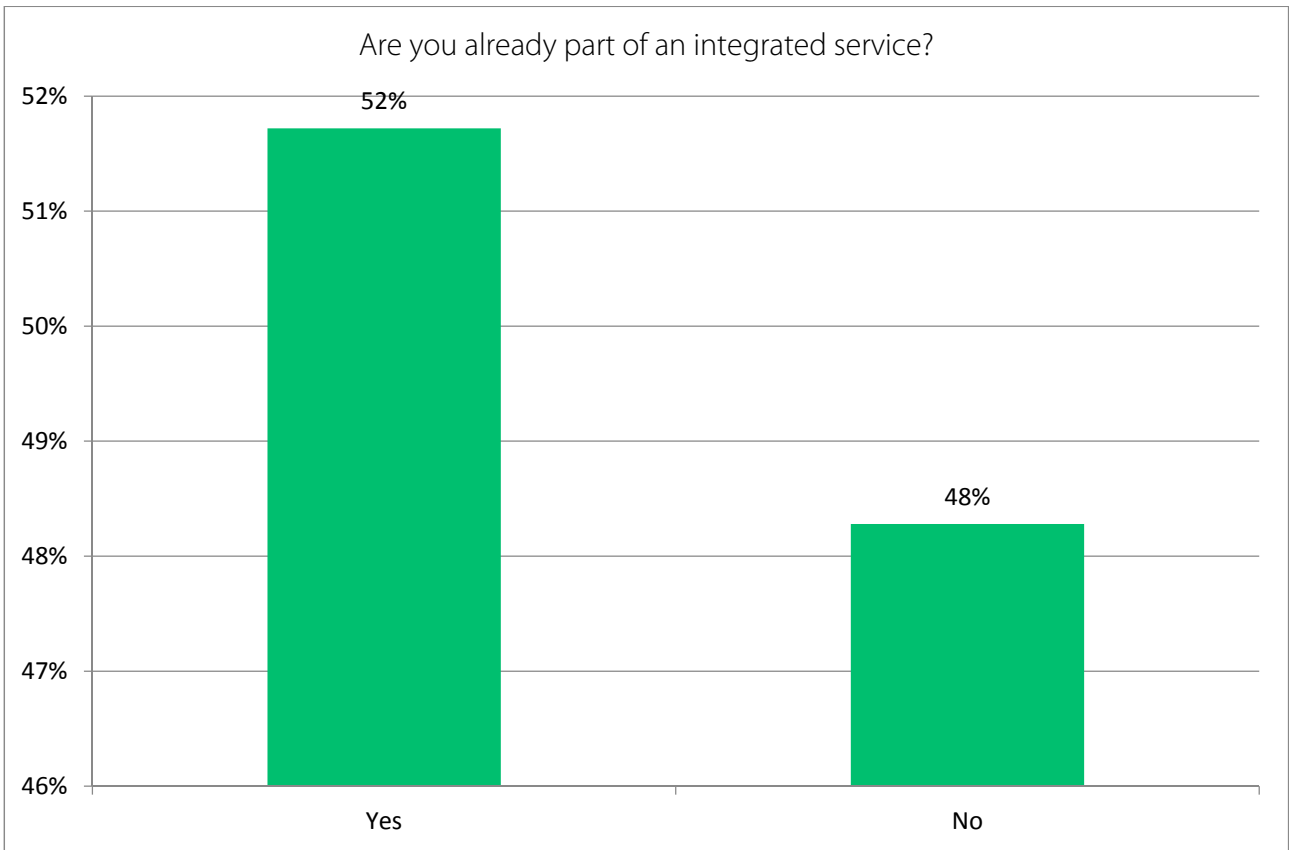
Of the respondents who replied to this question, (roughly a third of all those who completed the survey), the average response was that 10% of customers were choosing natural burial/woodland burial as their preferred choice.

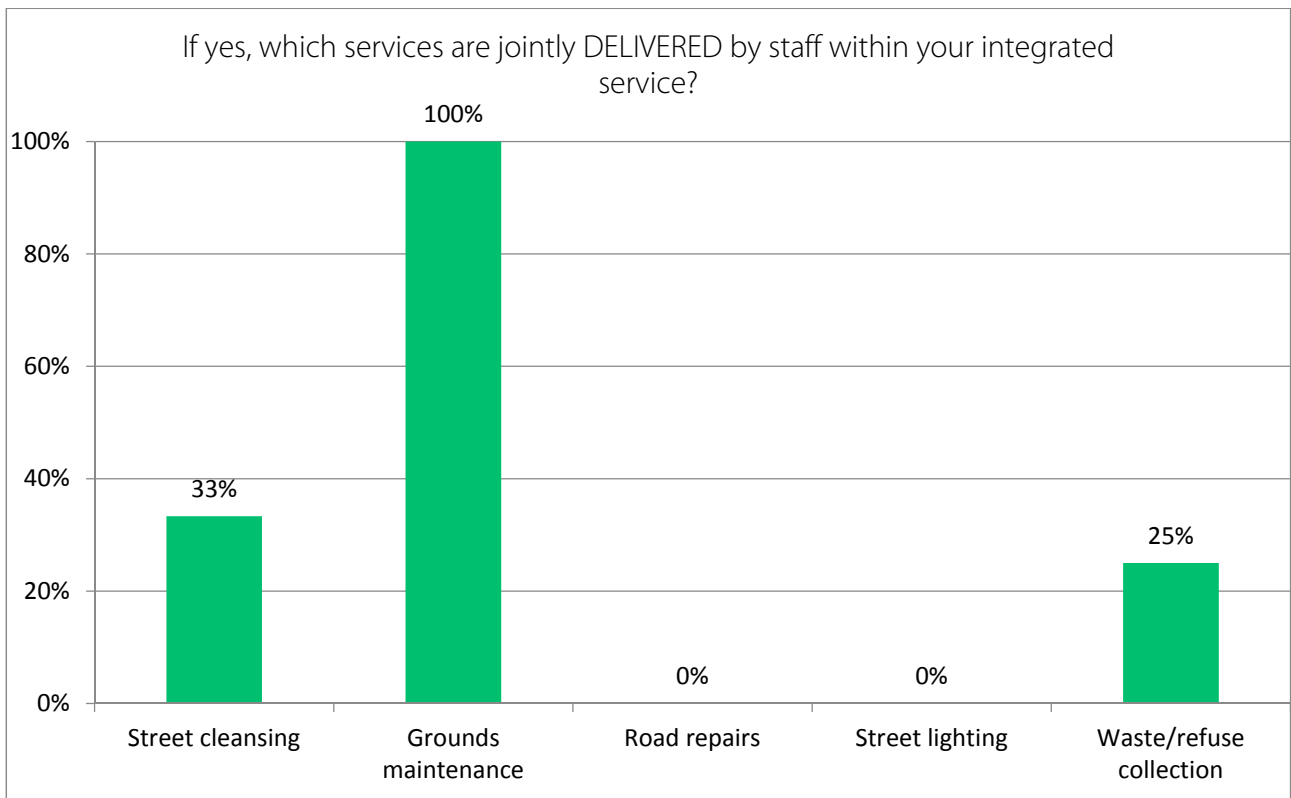


The need for a consistent and measurable quality standard has been an area APSE has been considering for a while. As such it has now introduced a separate element of the Land Audit Management System (LAMS) which can now be used to measure the quality of cemeteries.

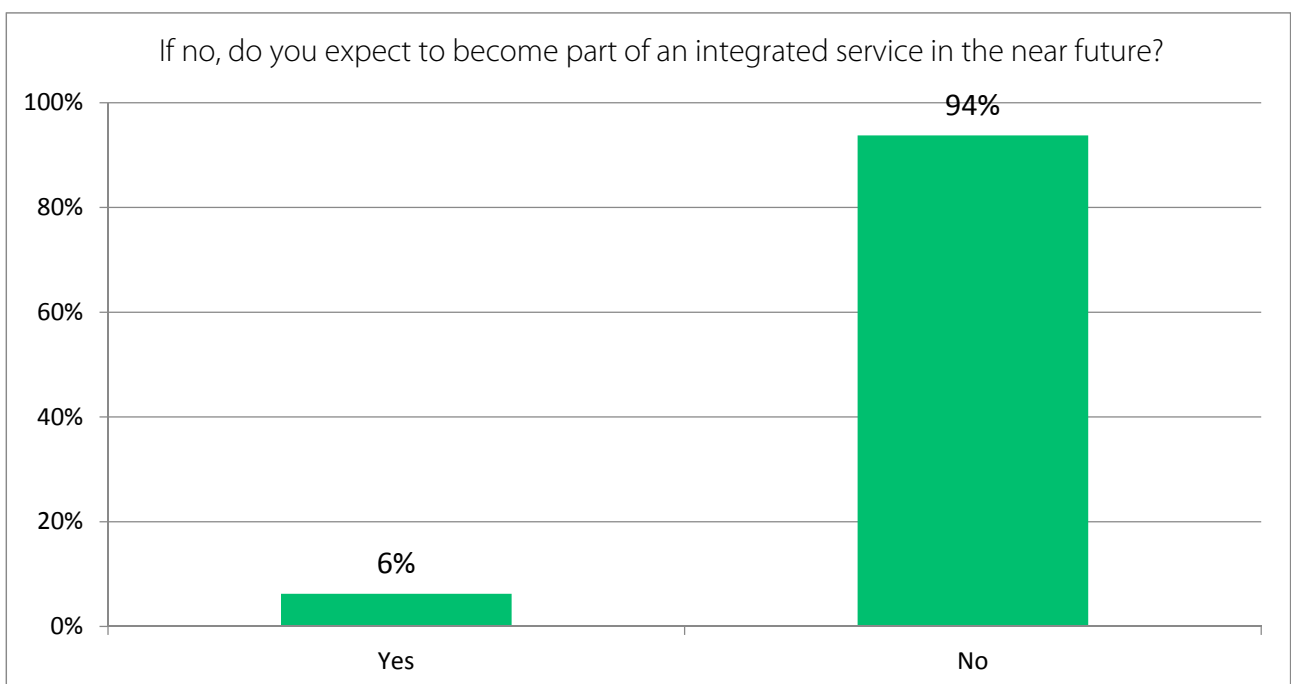
For further information on the general land audit management system please click the link below.

[Land Audit Management System \(LAMS\).](#)



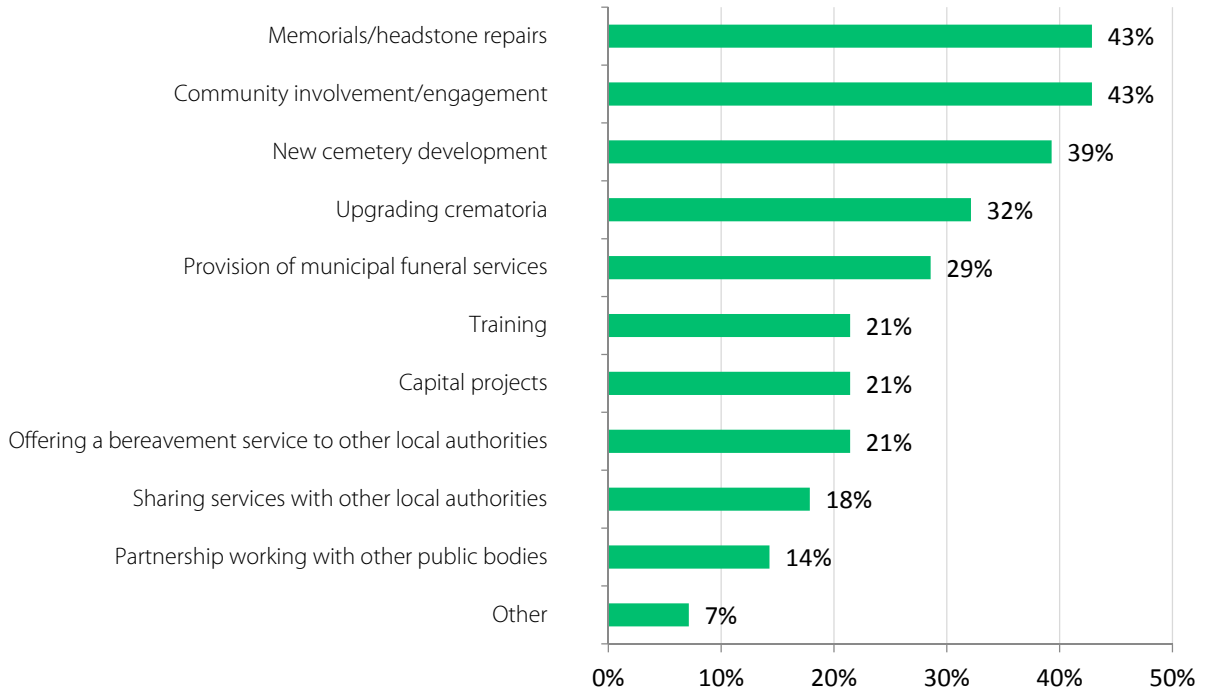


Currently over half of the local authorities run their cemeteries and crematoria services as part of a wider integrated service provision, usually as a result of the linkages with grounds maintenance and to a growing degree street cleansing. However where there are often multi-tasking between street 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.



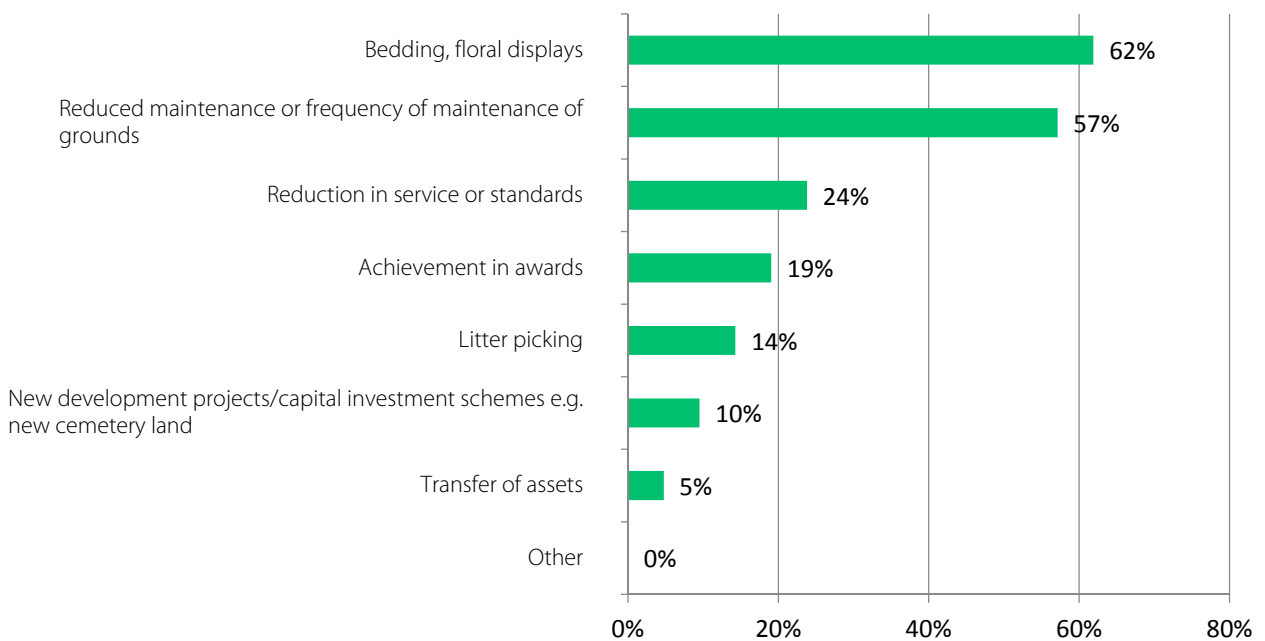
Here we see a clear distinction beginning to appear as there is less of an intention to integrate Bereavement Services into a larger integrated service approach than in 2018 when 15% were considering integration.

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

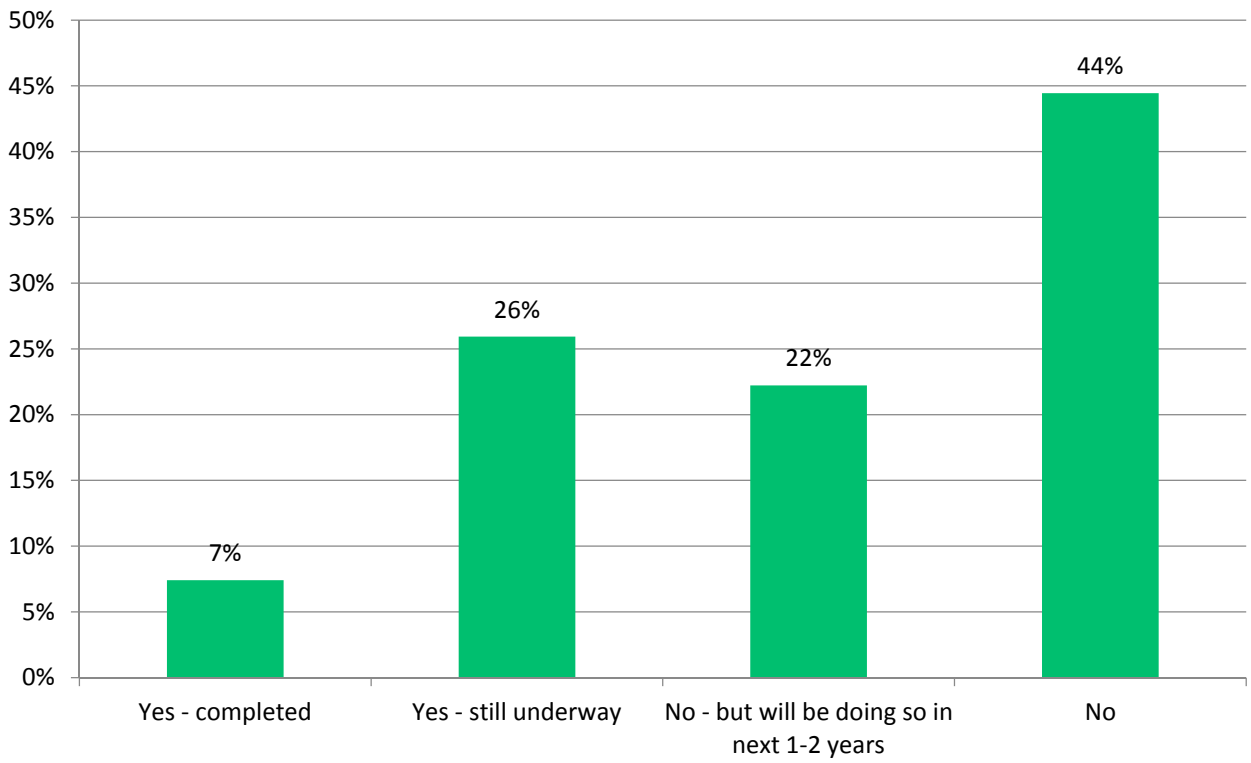


It is notable that areas of growth are quite diverse, ranging from legal and health and safety requirements, such as improving cremators and carrying out headstone inspections to improving cemeteries in general, i.e. new burial areas and new capital projects. Equally however, is the need to look at ways 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.

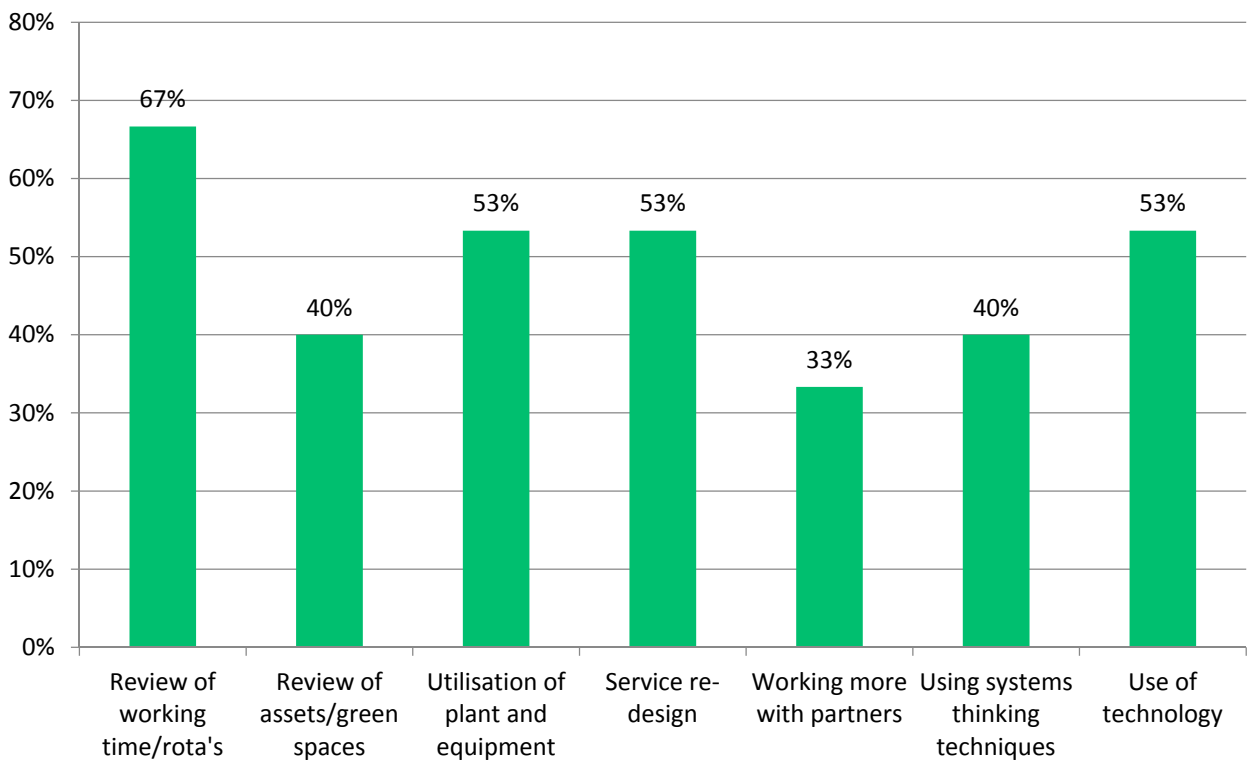
Where do you see future decreases in work for the service?

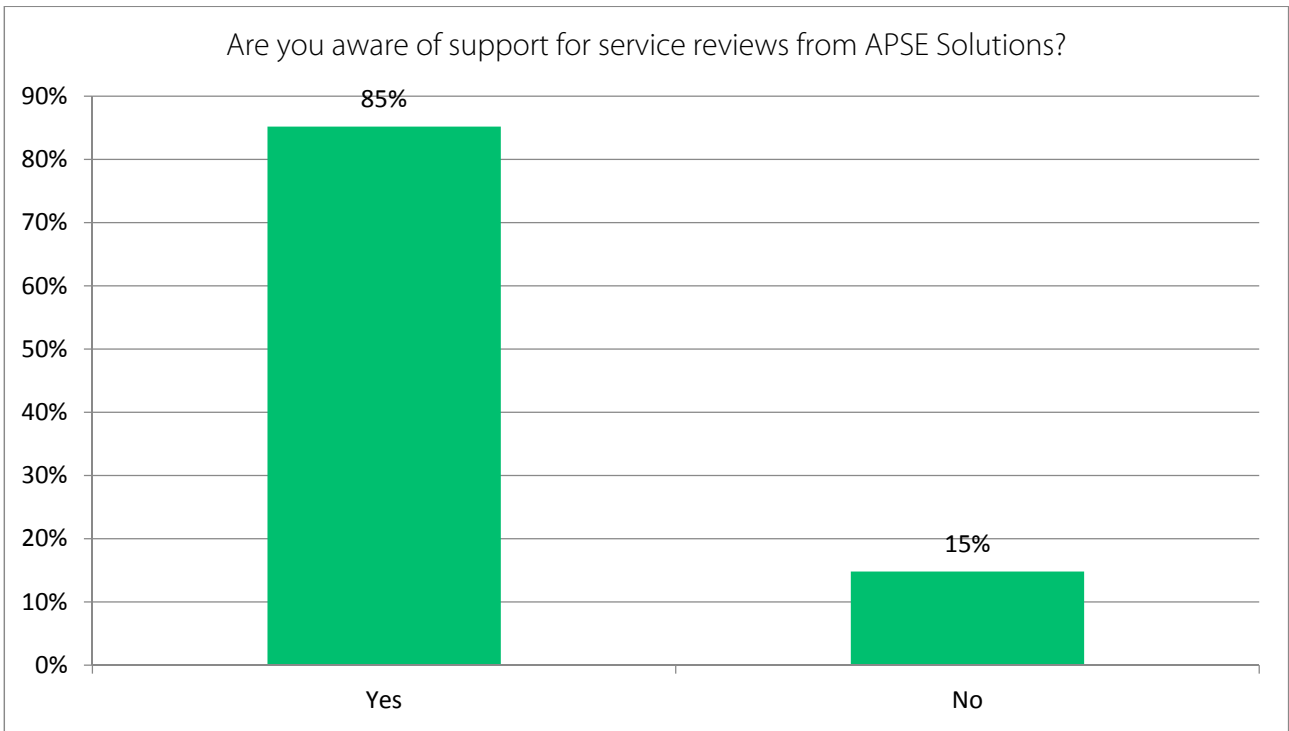


Have you undertaken a review of your service recently?



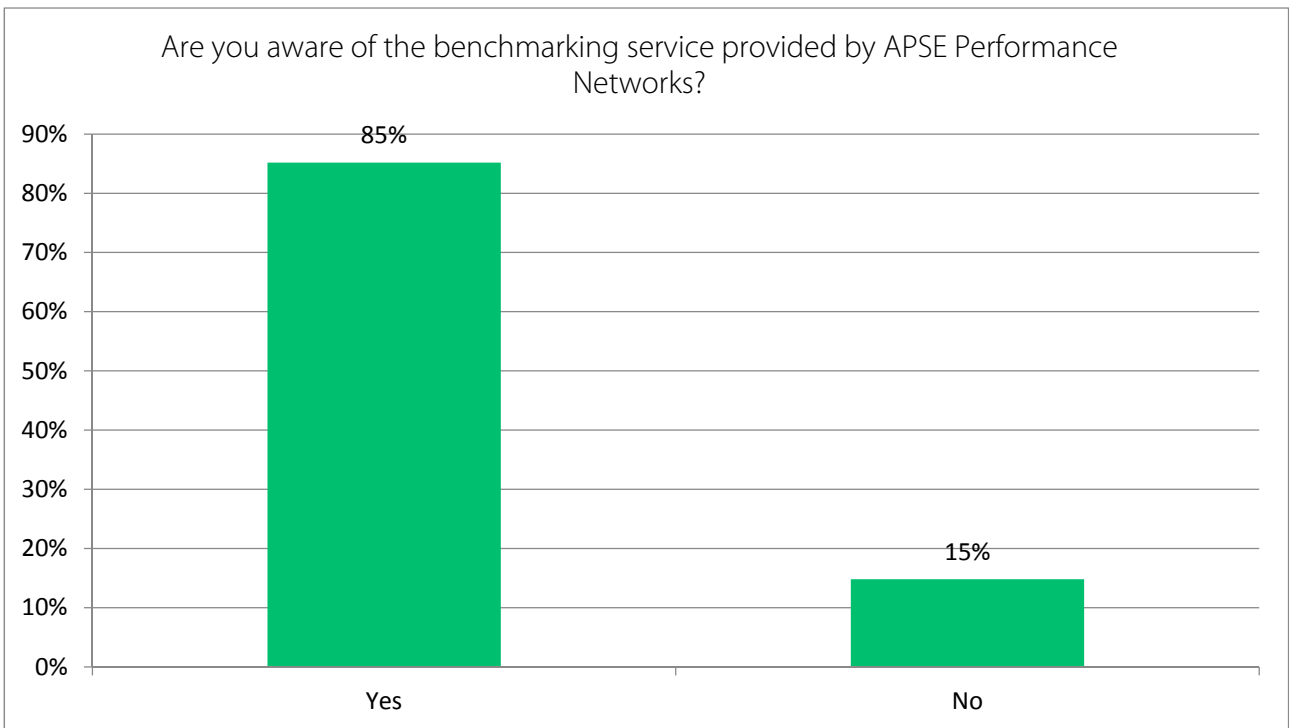
Will this review involve any of the following:





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

[APSE Solutions](#)



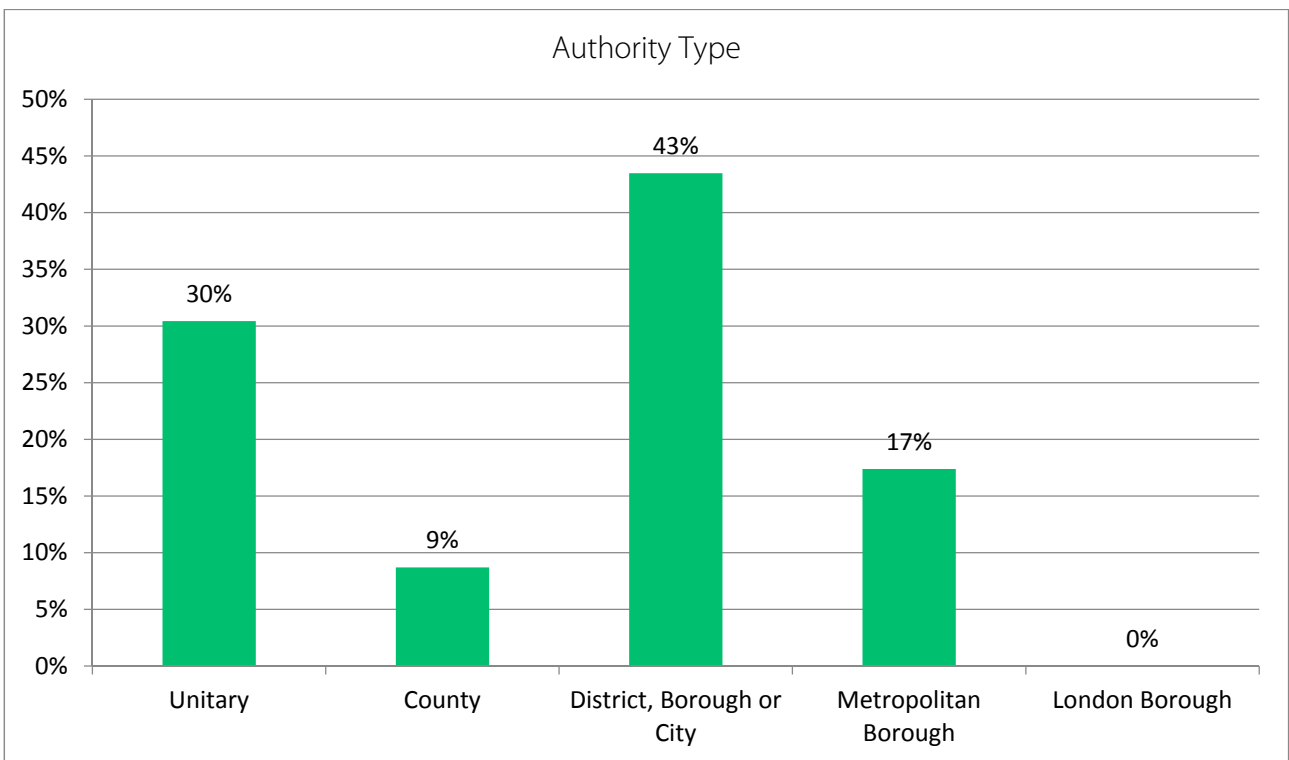
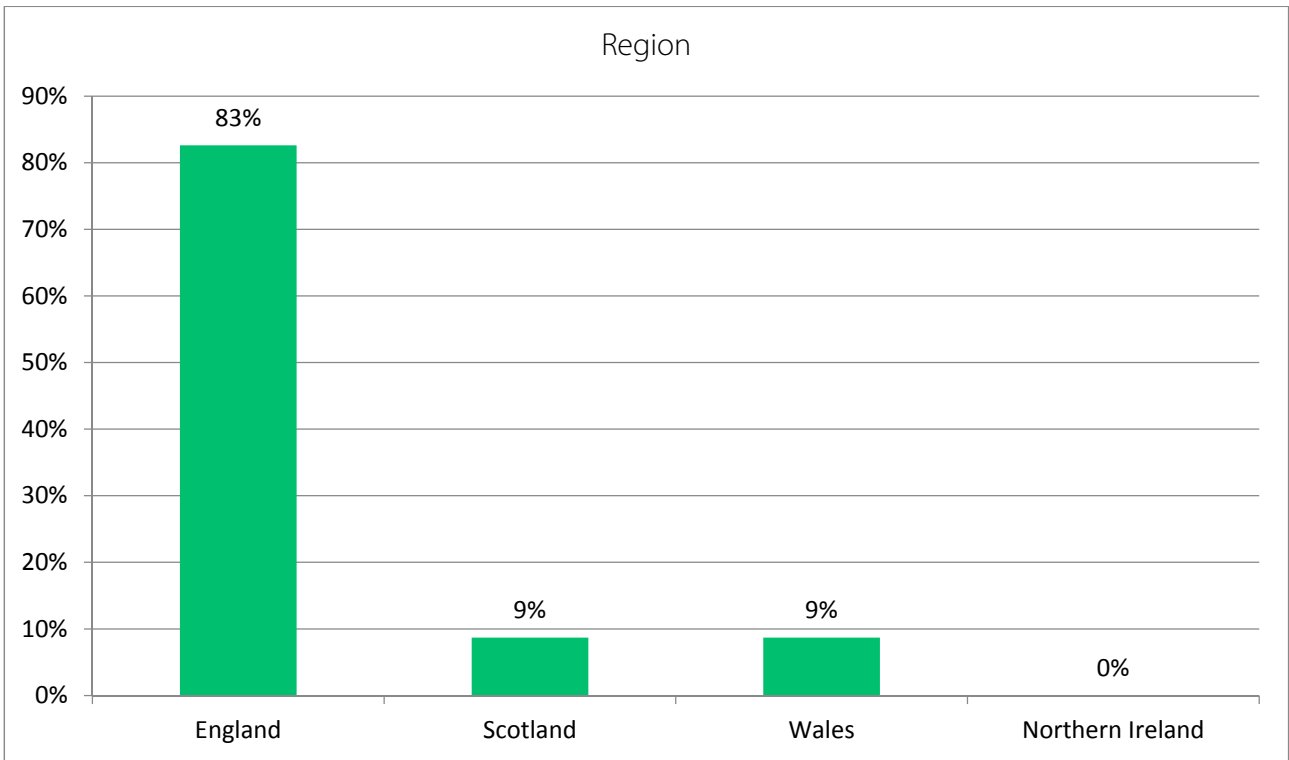
If you require further details about the services APSE Solution can provide please access the following link

[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

This being the second State of the Market Survey it has allowed some comparisons to be made against the 2018 report. Ideally as time progresses more meaningful comparisons will be able to be made and trend analysis to be carried out. It is hoped that this 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 continue to provide access to new ideas and service innovations as well as 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 still 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. Notably in this report there does appear to be some improvements in budgets for the forthcoming year, with few reporting cuts or loss of capital and revenue budgets, indeed quite a few respondents have reported anticipated increase in budget levels.

Although income generation is pursued by many and is gaining wider political support, it is clear that it is not pursued with the same vigour as in other local authority services, but considering the sensitivities surrounding the service and its users, this is perhaps not unexpected.

What has become more apparent when considering the results from both the 2018 and 2019 surveys, is the growing importance of Friends of Cemeteries Groups and the multiple benefits they can bring, most notably additional funding.

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.

The need to address environmental impact has also been raised within the survey and from results received from the two surveys to date, is the importance given to mitigating the environmental impact bereavement services operations have and highlighting the ways in which managers are addressing these issue. Reduced cremator emissions, natural burial options, environmentally friendly grounds maintenance regimes and increasing the opportunities for biodiversity within cemetery grounds quoted by respondents are all clear examples of good environmental practice .

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.

The State of the Market survey has now become an important tool in allowing trend analysis to be carried out and to ensure APSE's member 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