

State of the Market Survey 2019

Local Authority Parks and Green Spaces Services



Briefing 19-22
March 2019



The state of the market survey was conducted by Wayne Priestley, APSE Principal Advisor for Environmental Services.

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Local Authority Parks and Green Spaces Services State of the Market 2019

APSE conducted an online survey between December and February 2019. This follows on from the 2018, 2017, 2016, 2015, 2013, 2012, Parks and Green Spaces State of the Market survey where similar questions were asked to allow for trend comparisons. Early briefings are available on the APSE website. The most recent briefings can be accessed at the links below:

- [2018 results briefing](#)
- [2017 results briefing](#)
- [2016 results briefing](#)
- [2015 results briefing](#)
- [2013 results briefing](#)
- [2012 results briefing](#)

46 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	52%	30%	11%	0%	7%
Reductions in funding has resulted in a withdrawal of maintenance from some land and an increase in unmaintained land	52%	33%	15%	0%	0%
Lack of investment in parks and green spaces will have health and social impacts	87%	13%	0%	0%	0%
There is a clear link between parks/play provision and levels of crime/anti-social behaviour	35%	43%	9%	0%	13%
There's a limit to the extent to which volunteers can be involved in delivering parks and green space services	67%	31%	2%	0%	0%
The public should get free access to all parks	72%	22%	2%	2%	2%

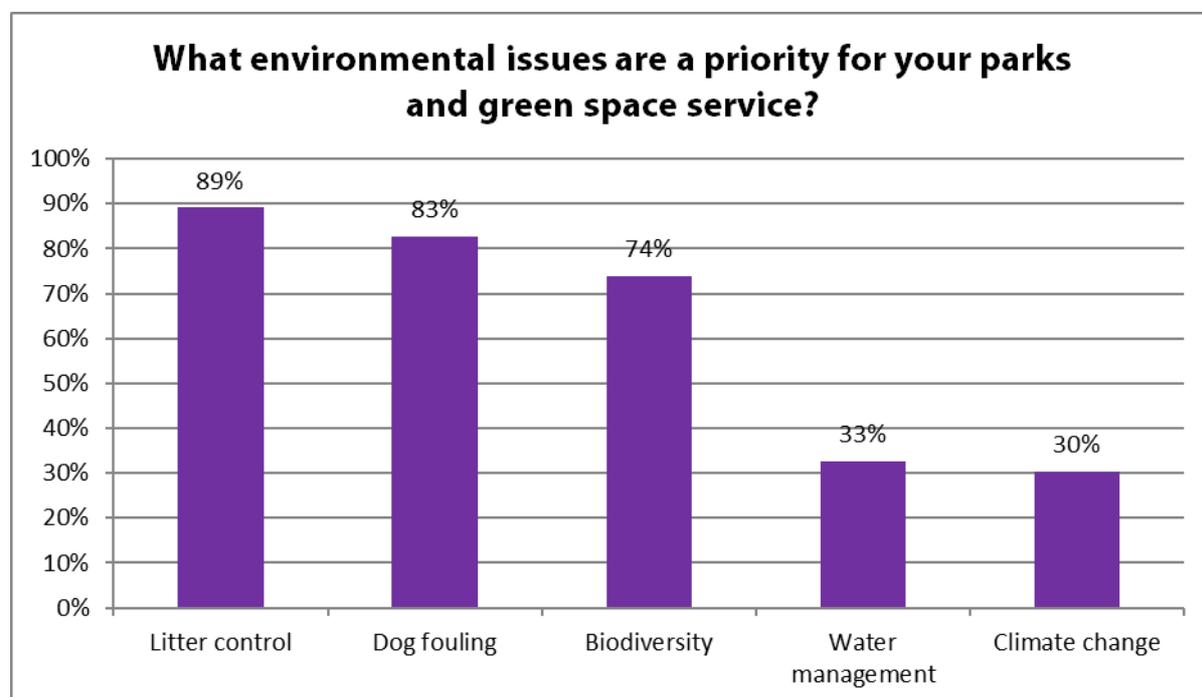
There has been a **rise** from 75% to 82% regarding respondents who either 'agree', or 'agree strongly' that 'the squeeze on public sector resources is affecting parks and green spaces disproportionately to other service areas. Equally, there has been an increase in the number of people who either 'agree' or 'agree strongly' that reductions in funding has resulted in a withdrawal of maintenance from some land and an increase in unmaintained land. This increase is from 75% in 2018 to 85% in 2019. Coupled together these two results show there are growing concerns about both budgets reductions and the impact this is having on the quality of parks maintenance.

100% of respondents either 'agree' or 'agree strongly' that the 'lack of investment in parks and green spaces will have health and social impacts' This is a 5% increase on last year's results. Later in the report there is evidence that health funding towards parks development has increased, which does seem to imply stakeholders such as public health organisations, are now beginning to recognise the value of greenspace assets to their cause.

78% either 'agree' or 'agree strongly' that 'there is a clear link between parks/play provision and levels of crime/anti-social behaviour' which is a 7% increase on last year's figure. This survey also took place in advance of the recent high profile knife crime issues.

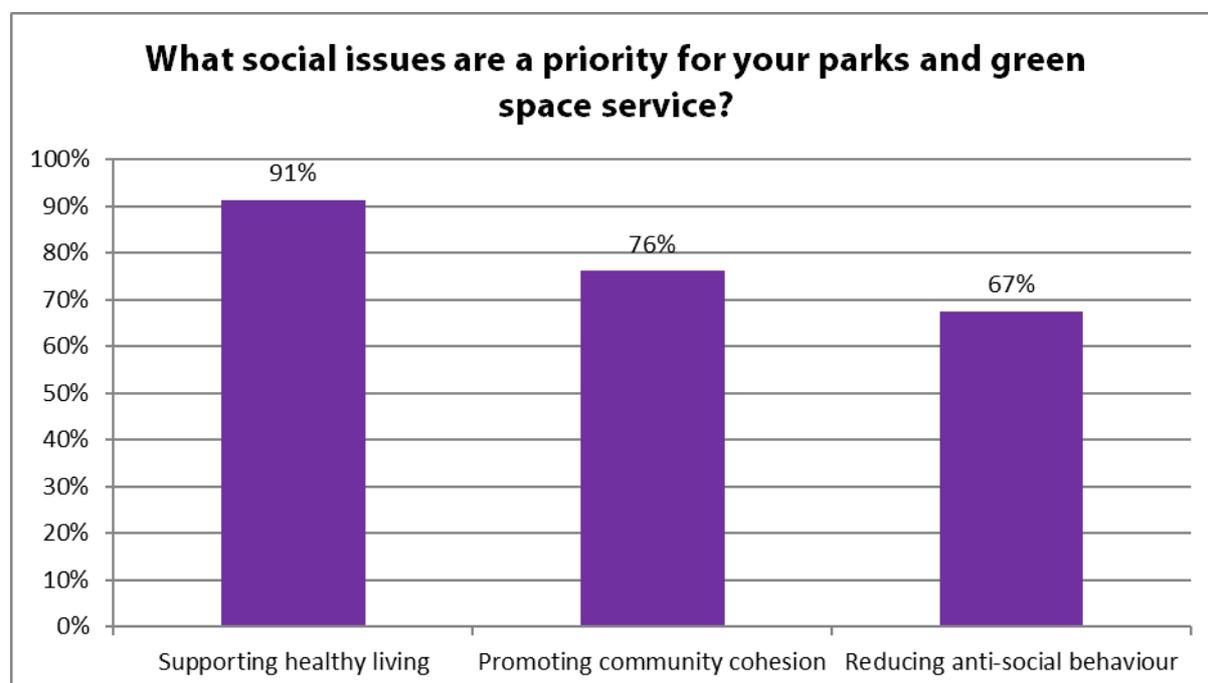
98% of respondents either 'agree' or 'agree strongly' that 'there's a limit to the extent to which volunteers can be involved in delivering parks and green space services' (95% in 2018) acknowledging the importance of the continued need for a strong horticultural skills base being provided through local authority employees.

94% either 'agree' or 'agree strongly' that 'the public should get free access to all parks which is a 3% rise on last year's figures. This figure has continued to increase over the last several years, a strengthening of the view that Parks should remain free for the public to enter.



The main environmental priority for parks and green space services remains 'litter control' (89%), with 'dog fouling' a close second. The importance of promoting biodiversity has

increased significantly, from 66% in 2018, to 74% in 2019.). The importance regarding the value of parks as ameliorating the effects of climate change' and water management have retained their importance with roughly the same number of respondents identifying both benefits as a priority. Parks and greenspaces are now being seen as major resources in promoting biodiversity and combatting the more extreme effects of climate change.

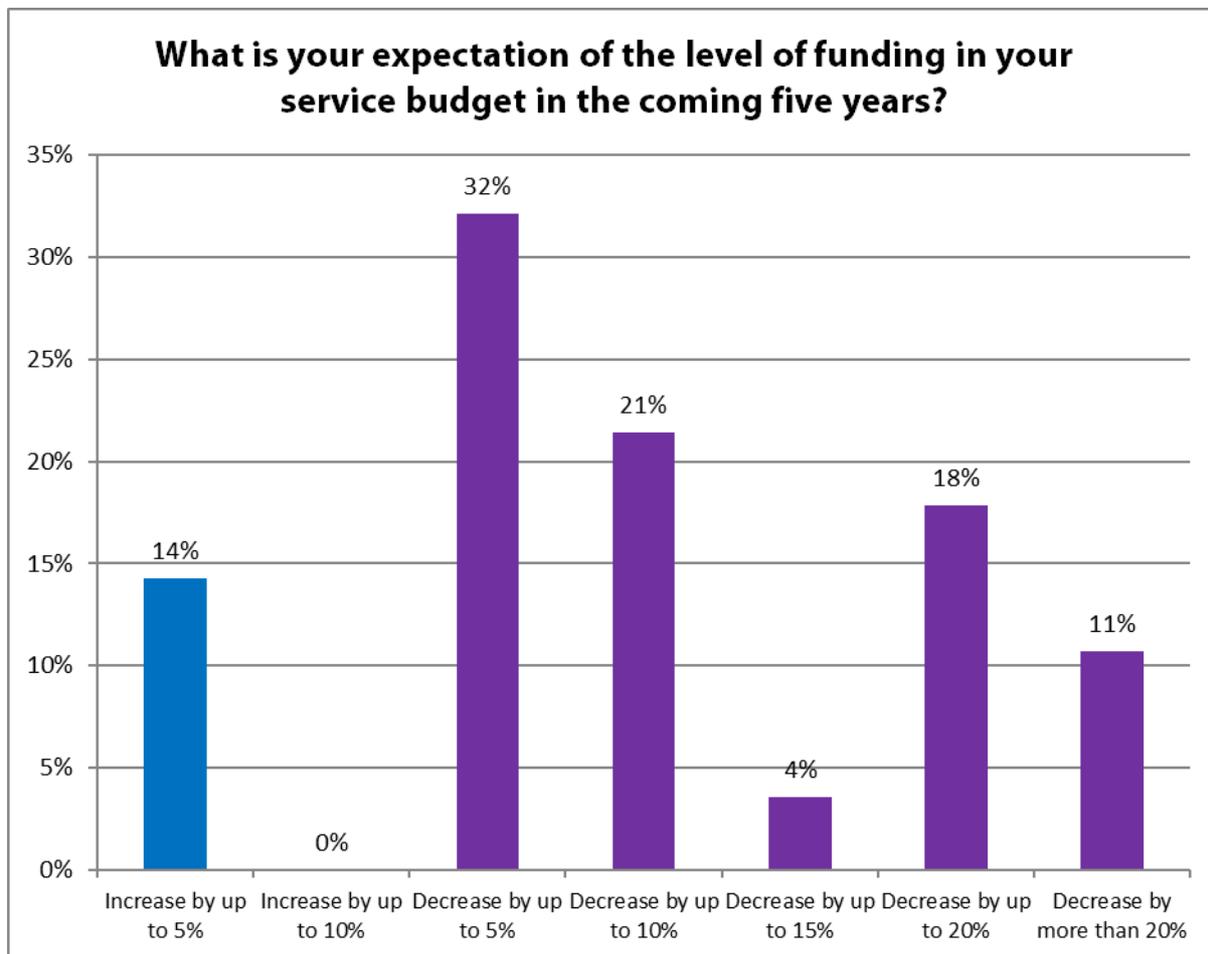


For the 2015 survey, we added a question on the social issues that are a priority for your parks and green space service. The most frequent response was 'supporting healthy living' which this year again recorded 91% showing the recognition of parks and greenspaces to the public's health and well-being. This high response was followed by 'promoting community cohesion' and 'reducing anti-social behaviour'. Additional responses received included improving children's play options and providing educational opportunities, creating beautiful areas to relax in and venues for community events.

Budget expectations

The number of respondents who expect the parks and green space budget to change over the next year has again fallen significantly from last year reducing from 81% in 2018 to 71% in 2019. Of those who expected a change in the budget, 70% expect a decrease in revenue, which is a significant improvement on 2018 when 85% expected a decrease, and 57% expect a decrease in capital which is a significant reduction on 2018, when 69% expected a decrease.

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 35% which is an improvement on 2018 when some expected decreases up to 50%. However, what is also noticeable is that the number who expect cuts between 15 -20% has fallen to 22% for 2019 as opposed to 31% in 2018. Linked to this fall is the reduction in those expecting cuts of up to 10% which has fallen from 33% in 2018 to 21% in 2019. However, those expecting cuts of up to 5%, has risen from 19% in 2018 to 32% in 2019. This suggests that those expecting harsher cuts are now much fewer with most cuts now being around the 5% mark.

Perhaps the most notable change is with regards to those expecting increases in budgets. 14 % said they expect budget increases of up to 5% as opposed to 2% in 2018.

This reduction in the level of cuts and an increase in those expecting budget increases hopefully will be something which will improve in the coming years as the value of our parks and greenspaces is more widely appreciated.

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

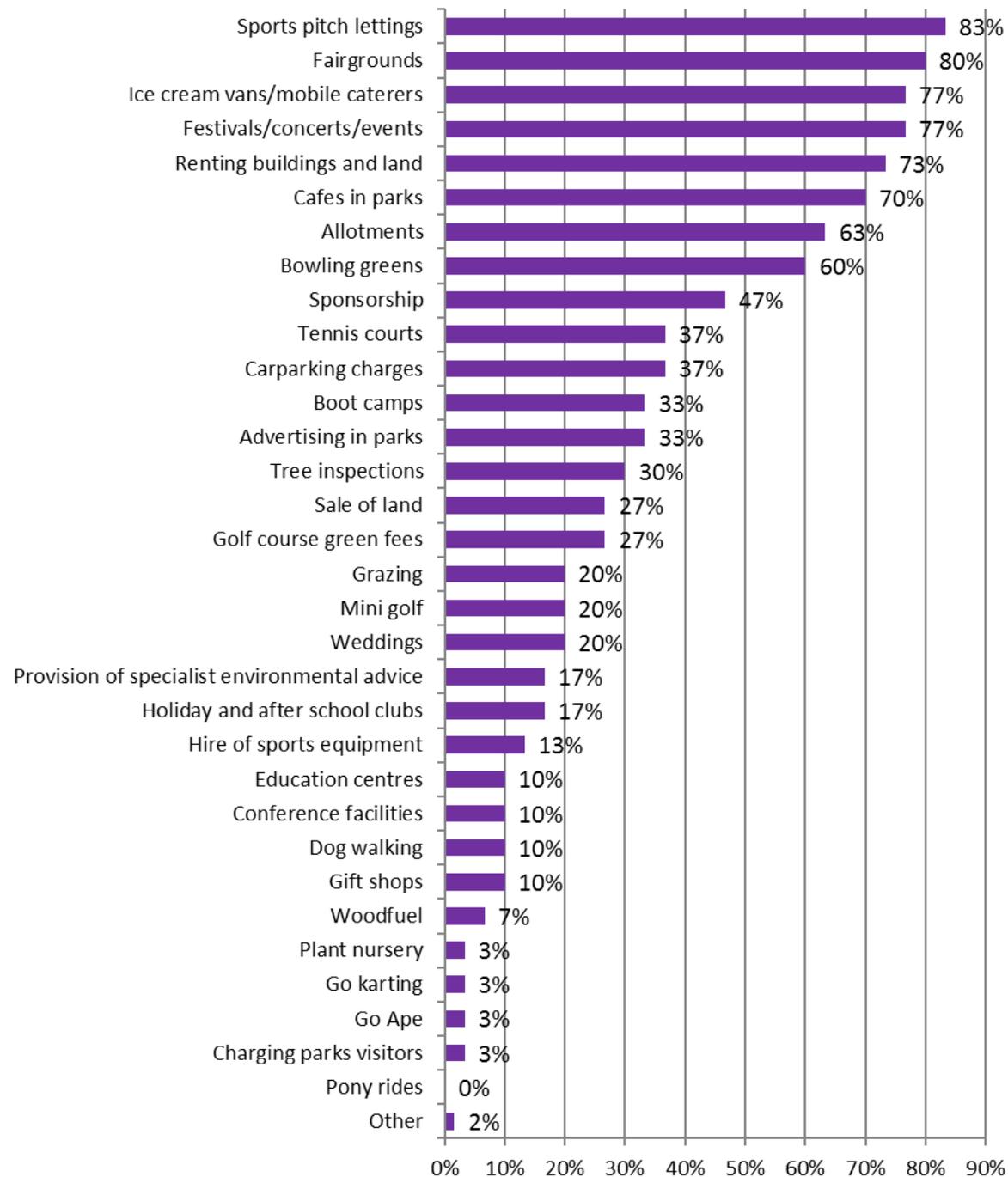
- Rethinking staffing levels through reducing management tiers, cutting administrative staff, reducing IT/communications systems updates, introducing larger seasonal

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 and toilet provision)
- Asset transfer of buildings and facilities within parks (cafes, bowling greens, etc.)
- Promotion of sponsorship and donation opportunities
- Introducing new forms of land management such as grazing which results in an income.
- Bringing services back in-house to reduce contractor costs and increased flexibility opportunities.

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

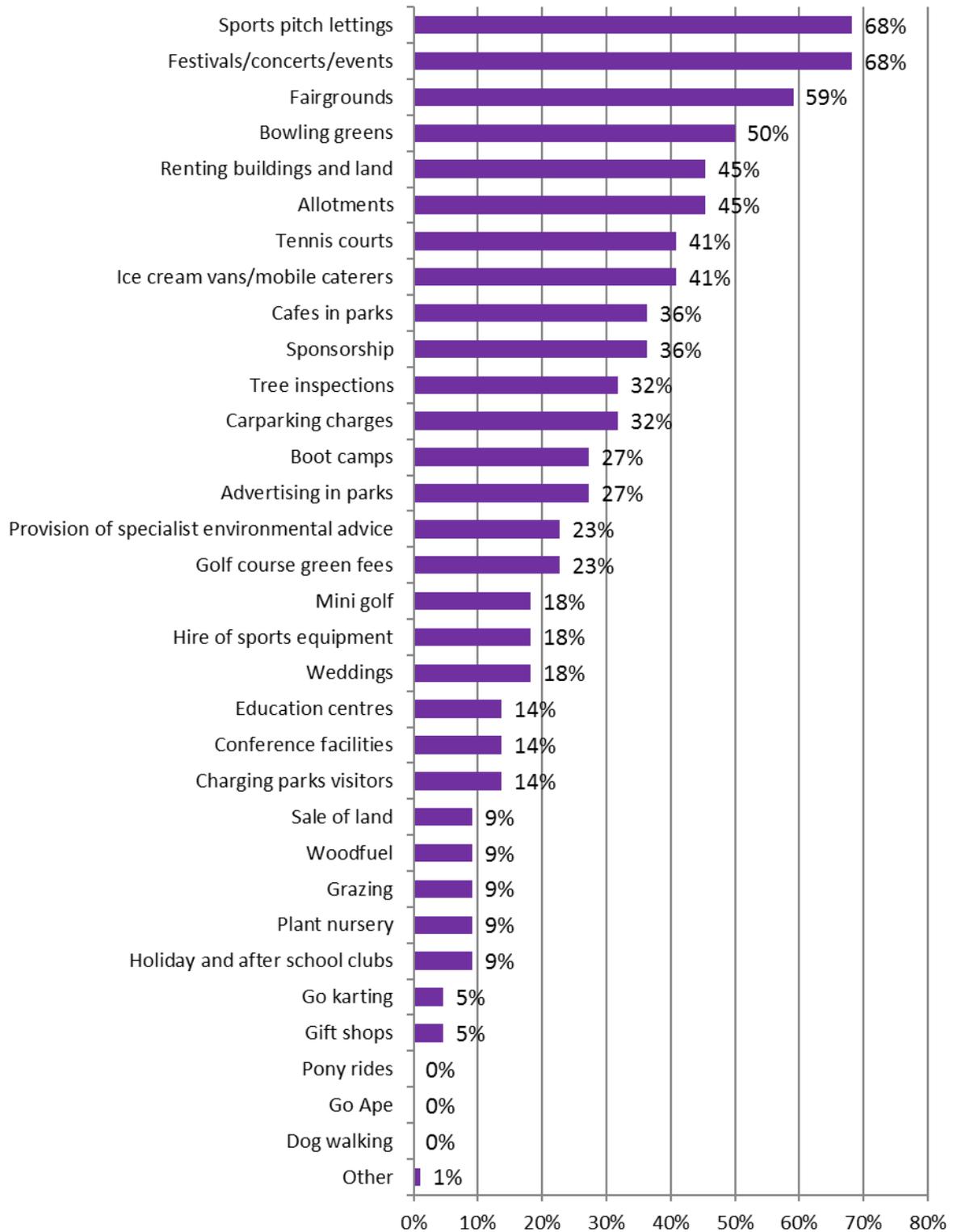
What areas do you currently generate income in through fees and charges?



Several areas have shown significant increases in income generation, these include fairgrounds, ice cream vans/mobile caterers, renting building and land sponsorship, inspections and advertising,

Areas where respondents intend to increase fees and charges over the next 2-3 years include:

What areas do you intend to increase fees and charges in over the next 2-3 years?



Respondents identified several barriers to generating income, these included:

- 60% cited 'competing priorities (e.g. budget cuts)' a slight rise on 2018, also 'a lack of time,' at 60% is slightly higher than 2018 when the score was 50%.
- 'experience of staff in bringing in new income' 64%, which is a significant increase on 2018 when the figure was 49 %, (suggesting staff are still requiring better skills at raising income),
- 'political resistance' 32%, a fall on 2018 when this stood at 47%- suggesting politicians are acknowledging the need to generate income to offset budget gaps.
- 'public resistance' 36% a significant decrease on 2018 when the figure recorded was 53%, which may indicate the public are more willing to pay for services within parks. And finally,
- 'lack of investment funding' at 57% a large increase on 2018 when the figure stood at 40%. Potentially this rise could be linked with the fact in order to raise income parks need to be able to have attractions which the public are willing to pay for.

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.

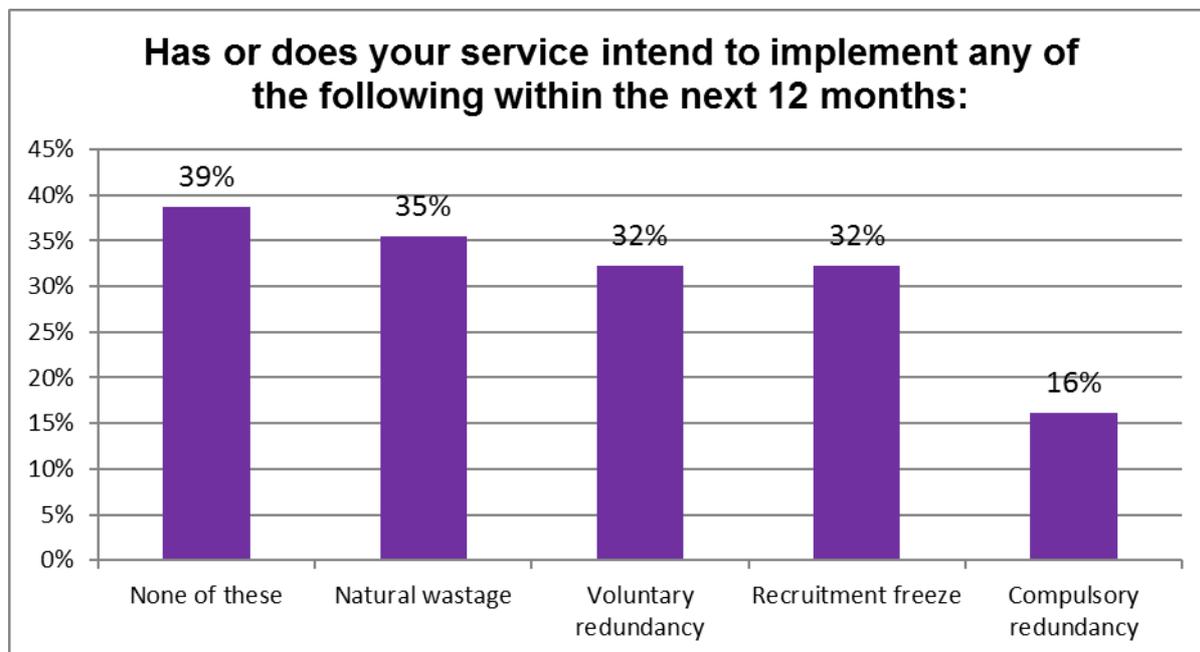
Aside from income from fees and charging, the majority of parks obtain additional funding from

- 'Section 106 money' 93%, an increase on 2018 when 82% reported monies from S106 funding.
- 'National Lottery Heritage Fund' 41% which is a significant fall on 2018 when 62% of funding came from this source. Possibly due to a change in the HLF funding allocation criteria.
- The number of respondents receiving income 'through friends of parks groups' has risen to 90% as opposed to 66% in 2018, showing just how vital such groups are now becoming to their local parks and greenspaces.
- Grant funding from other sources has fallen since 2018 from 52% to 48% in 2019, Sponsorship' was received by 41% which is a 7% fall on 2017 when the figure stood at 48%.
- Figures for 'health funding' has remained fairly constant with 24% receiving funding from this source as opposed to 27% in 2018.
- 'Sale of assets' (e.g. timber) has fallen from 19% in 2018 to 14% in 2019.
- 'Private funding' has again fallen from 10% in 2018 to 7% in 2019 Respondents were asked whether they sold their services outside of the Local Authority. 24% currently sell services to the 'private sector', a significant decrease on 2018 when over 35% recorded selling services outside the local authority, with 29% currently selling services to 'other local authorities', the same as 2018. The most noticeable decrease has been selling services to 'other public sector bodies' which has seen a fall of 14% (33% in 2018)

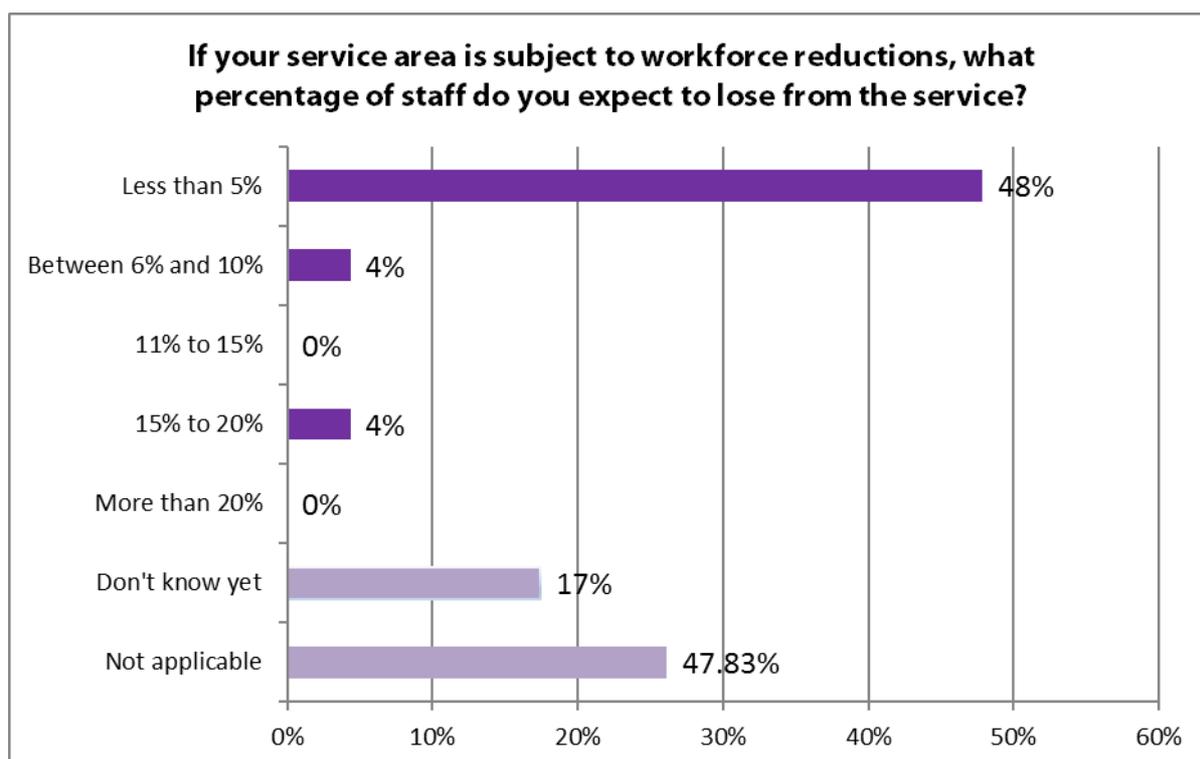
When asked about selling local authority services only 58% stated that they did so which is the same as 2018, and this relatively low return is somewhat surprising considering the ongoing level of budget cuts parks continue to receive.

b) Staffing

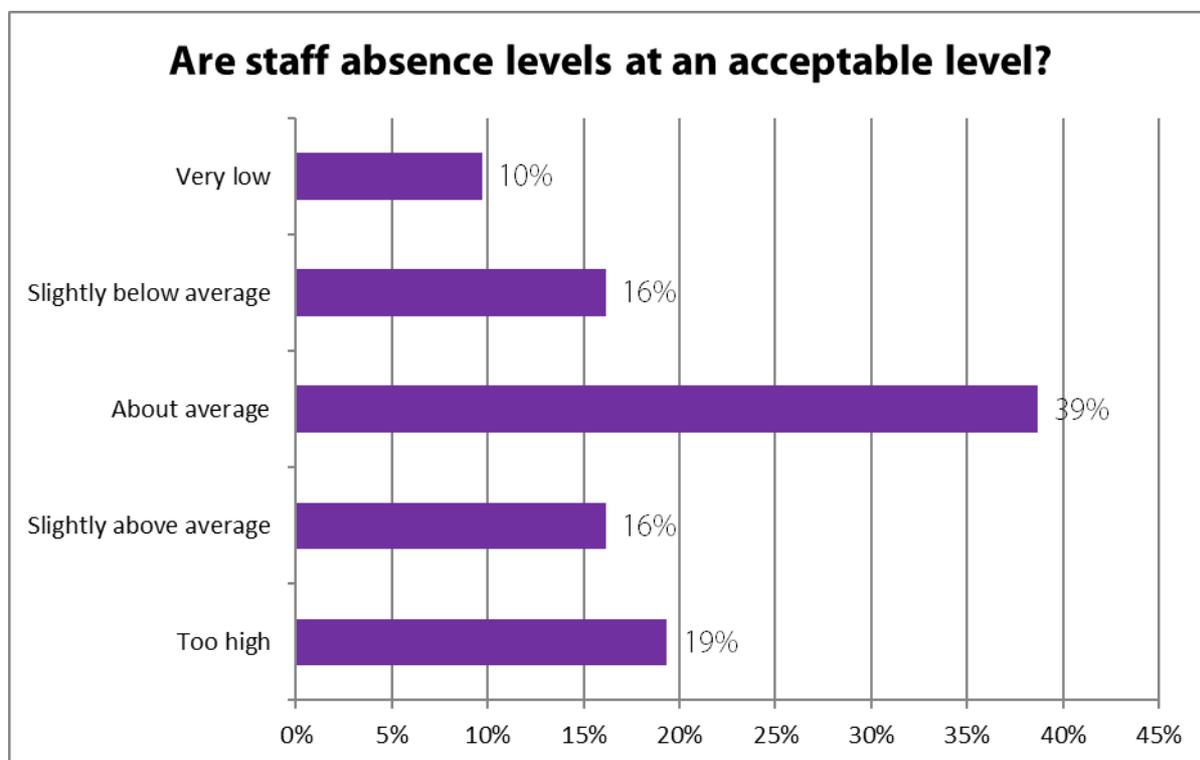
In terms of staffing, the survey asked if respondents have or intend to implement any of the following within the next 12 months and the results are as follows:



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:-



The outlook of respondents since the 2018 results survey could be seen as more positive particularly that almost half of respondents said workforce reductions were not applicable to them as compared to only 21% in 2018, also the number expecting to lose less than 5% in 2019 was 48% as opposed to 28% in 2018 showing more people were expecting to lose a fewer number of staff than previously. This could be seen as a sign that staffing levels are stabilising with fewer councils looking to reduce staffing levels beyond those expected.



There has been little change in staff absence levels when compared to 2018

APSE's benchmarking service [Performance Networks](#) has shown that staff absence is now standing at 4.45% which is well below the recorded high of 5.57% in Year 10. The average performance score in human resources and people management fell to 55.29 down 2.99. This information has been extracted from APSE Performance Networks data collected between Years 2 and 20 using PI 13a – Percentage staff absence and PI 16 – Human resources and people management.

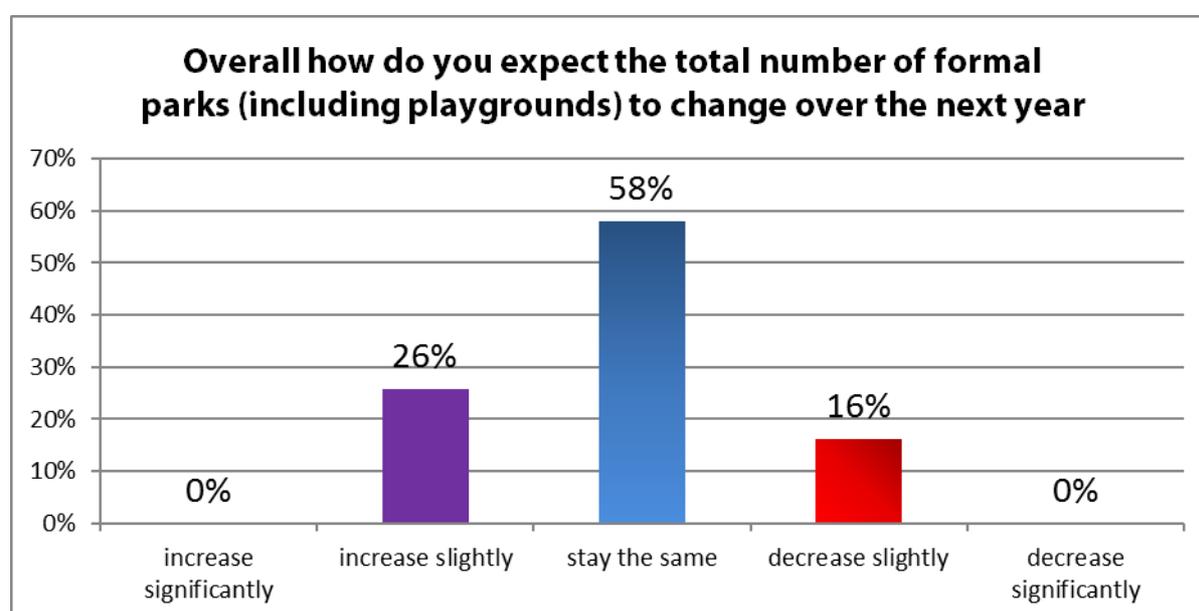
In terms of training, 68% thought that the training budget will stay the same over the next 12 months and 13 % thought that it was going to decrease, which is an improvement on 2018 when 20% though training budgets would decrease. Interestingly 19% of respondents said their training budgets would increase perhaps showing the recognition that the changing role of parks professionals is requiring new and additional skills.

71% of respondents stated that they currently have apprentices which is a significant increase on 2018 when only 49% reported that they had apprentices, and 63% are planning to recruit apprentices in 2019/20 which is a 3% rise on 2018. 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.

c) Numbers of parks and visitor numbers

The State of the Market survey has tracked the change in responses since 2008 to the question 'Overall how do you expect the total number of parks (including playgrounds) to change over the next year?' 58% of respondents expected the total number to stay the same, as opposed to 56% in 2018, with 16% expecting a slight or significant decrease as opposed to 22% in 2017 and the remaining 26% expecting a slight or significant increase over the next year which is a 14% rise over the past three years.



When asked about the number of visitors to formal parks during the past year, 61% said they had seen increases. 38% felt visitor numbers had remained the same 2017. No respondents believed visitor numbers had decreased.

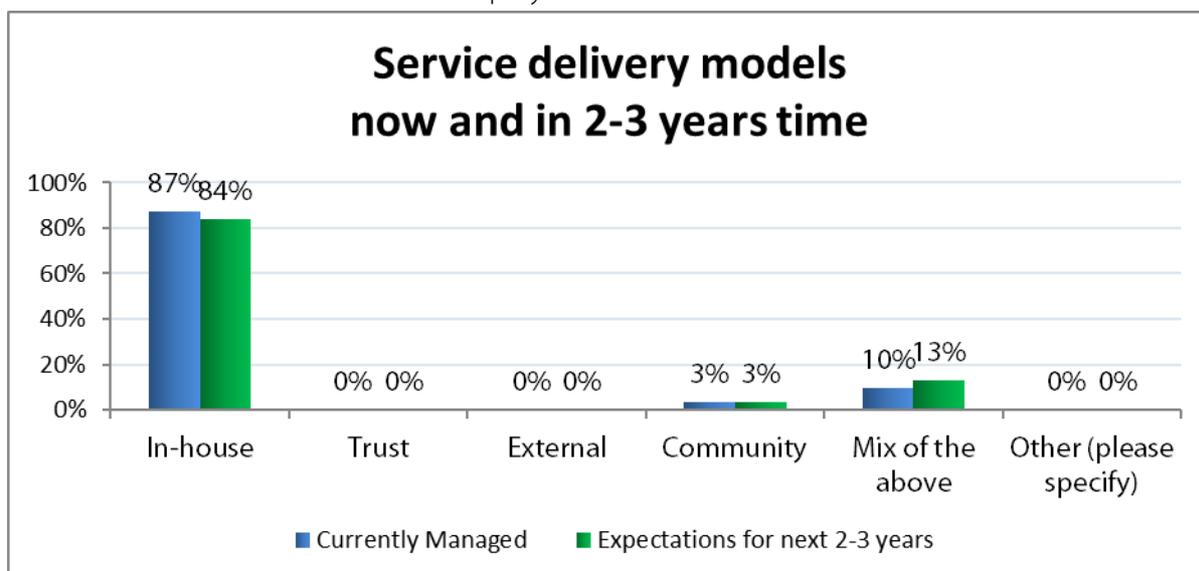
Only 29% of survey respondents monitor visitor numbers through a mixture of footfall/visitor/gate monitors, car monitors/car park payment monitors, audits and visitor surveys. Better visitor number monitoring is crucial if parks managers are to argue that these assets are well used and therefore worthy of ongoing investment and protection.

d) Service delivery

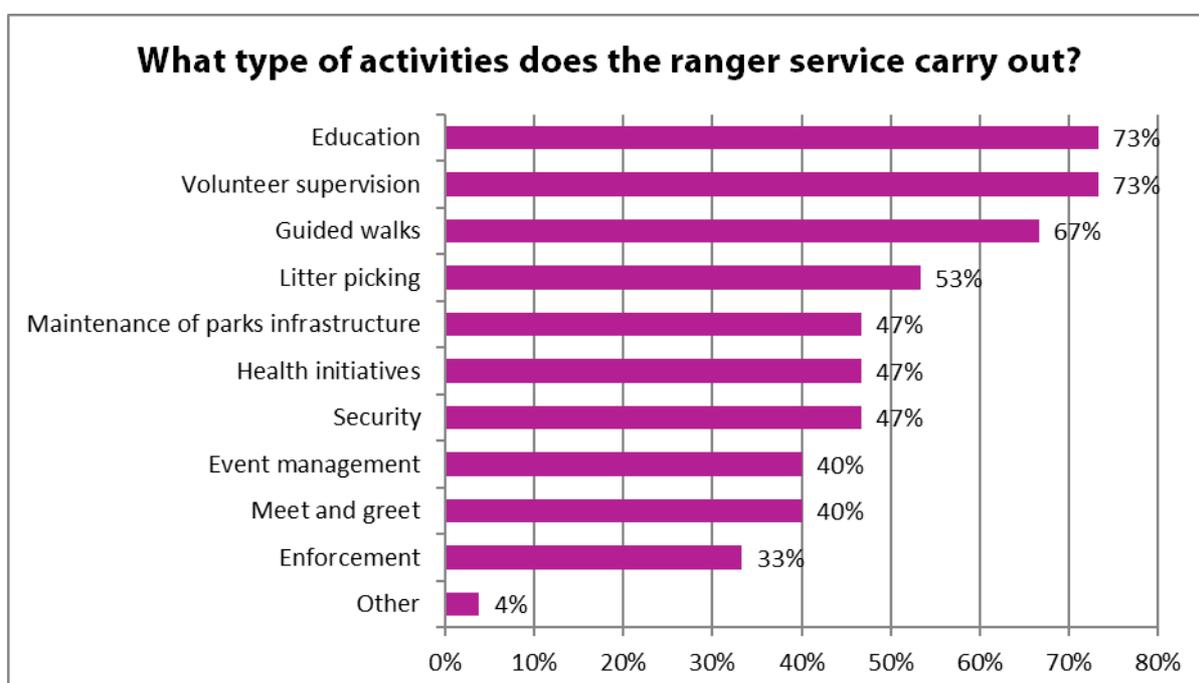
87% of respondents currently have in-house services (up 12%), and 84% expect this to be the case in 2-3 years' time, which is a significant increase on 2018, when only 73% expected in-house service provision to be the likelihood in 2-3 years' time. When asked how respondents expected the service to be managed in the near future, only 13% expected a mix of in-house, trust, external and community management a slight rise on 2018.

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:

- 66% have dog control orders in parks and green spaces and 69% have on the spot fines for litter/fly tipping; 24% have none of the above
- 74% use seasonal labour. Of those who have seasonal labour, on average 20-25% of their workforce are employed on these terms
- 45% have annualised hours. Of those who have annualised hours, on average over 80% of their workforce are employed on these terms

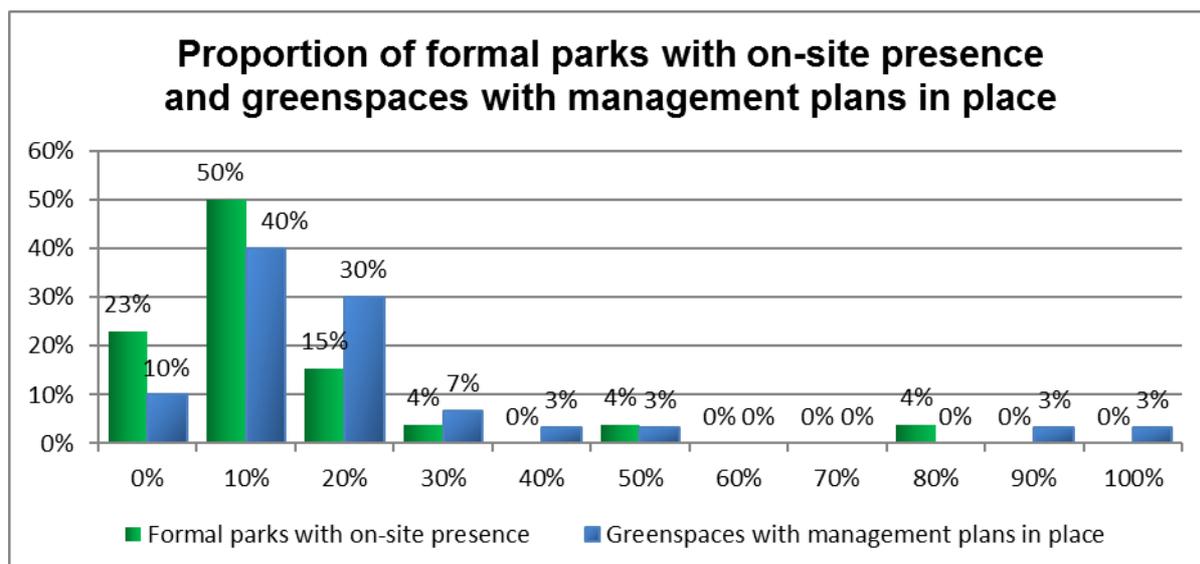


48% reported having parks rangers, but 100% reported having decreased ranger numbers over the past 3 years through a mixture of natural wastage and budget reductions. The ranger service carries out a range of functions including:



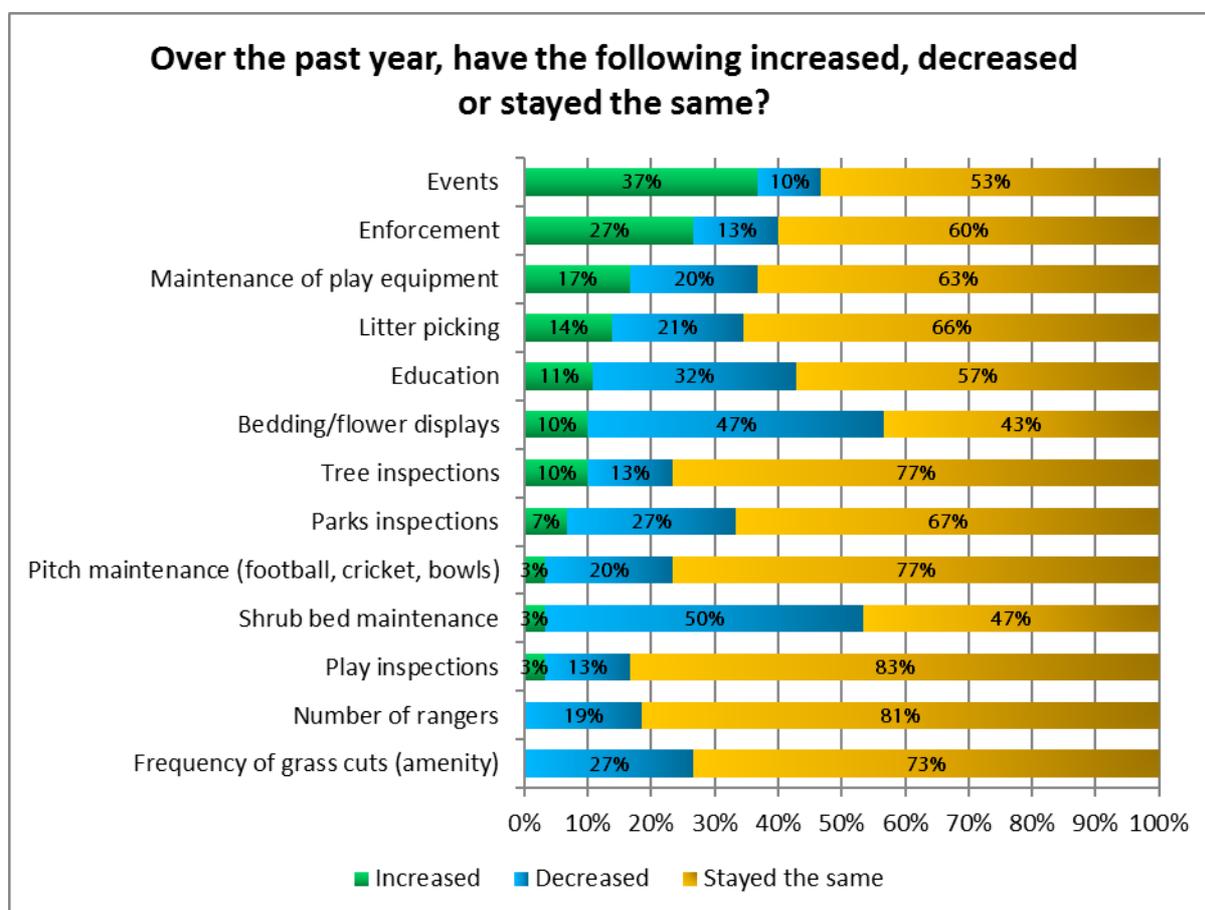
The most significant increase in roles is with regards to managing volunteers with over 73% of rangers are involved in this activity.

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:



e) 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:-

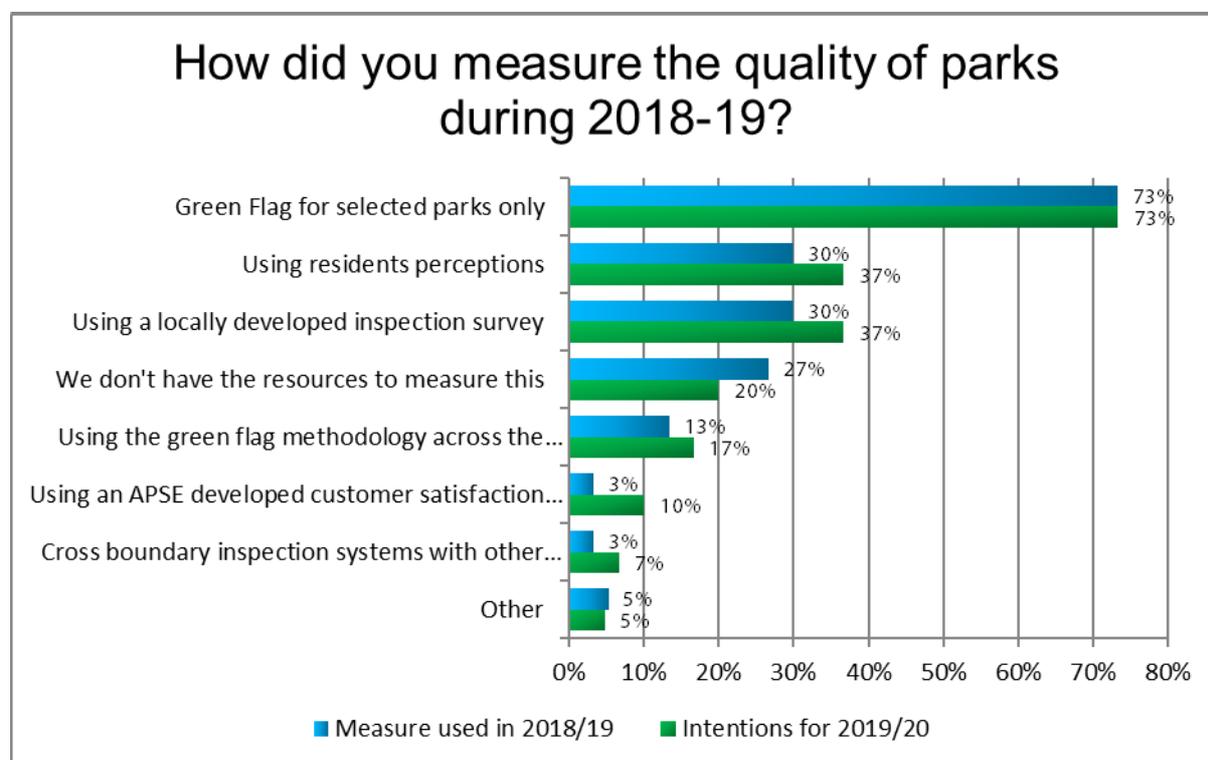
- Events
- Tree inspections
- Enforcement and education

The main areas of decrease were bedding/flower displays, frequency of grass cuts, shrub bed maintenance and pitch maintenance.

In this years' 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 15-18 cuts, with 18% stating 8 cuts or less, 15% stating 14 cuts, 5% stating more than 18 cuts.

3% used Cylinder machines for estate and highways grass cuts, 20% used Rotary, 10% used Flail and 65% used a mixture of the above.

The survey asked how quality of parks was measured during 2018/19 and how respondents intended to measure this in 2017-18 and the results were as follows:

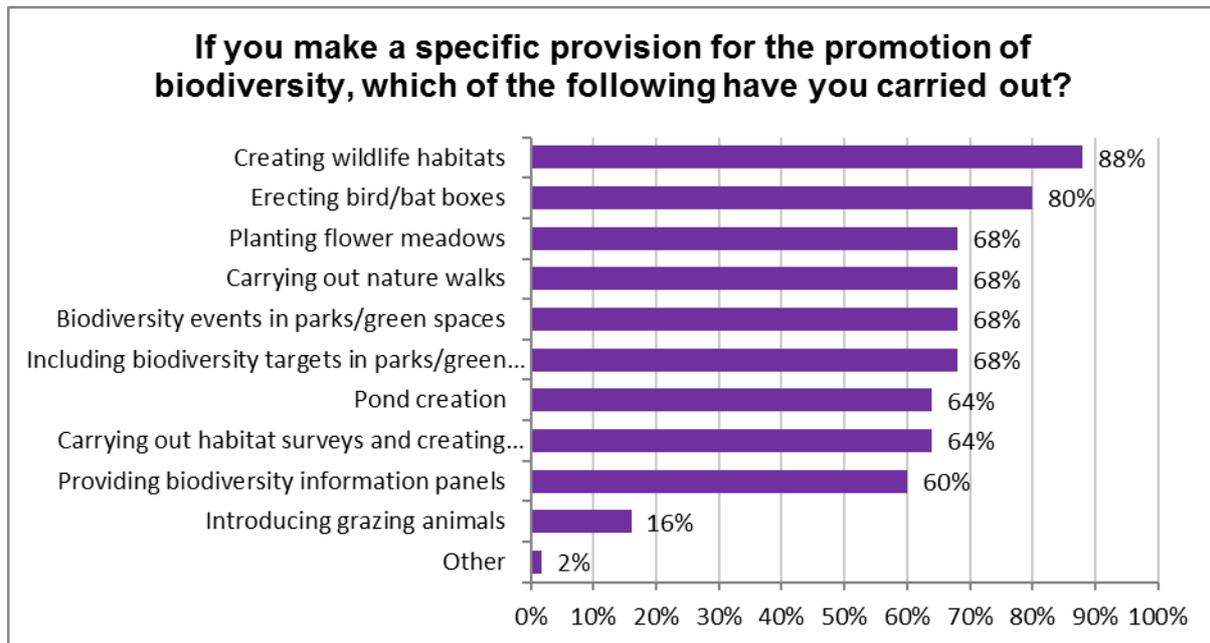


Respondents' intentions for 2019/20 saw a rise in APSE's customer satisfaction survey and locally developed systems.

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. The use of APSE's LAMS system has doubled over the past two years and with the introduction of an App to reduce paper recording requirements, it is expected this will lead to further increased usage over the next twelve months.

f) Biodiversity

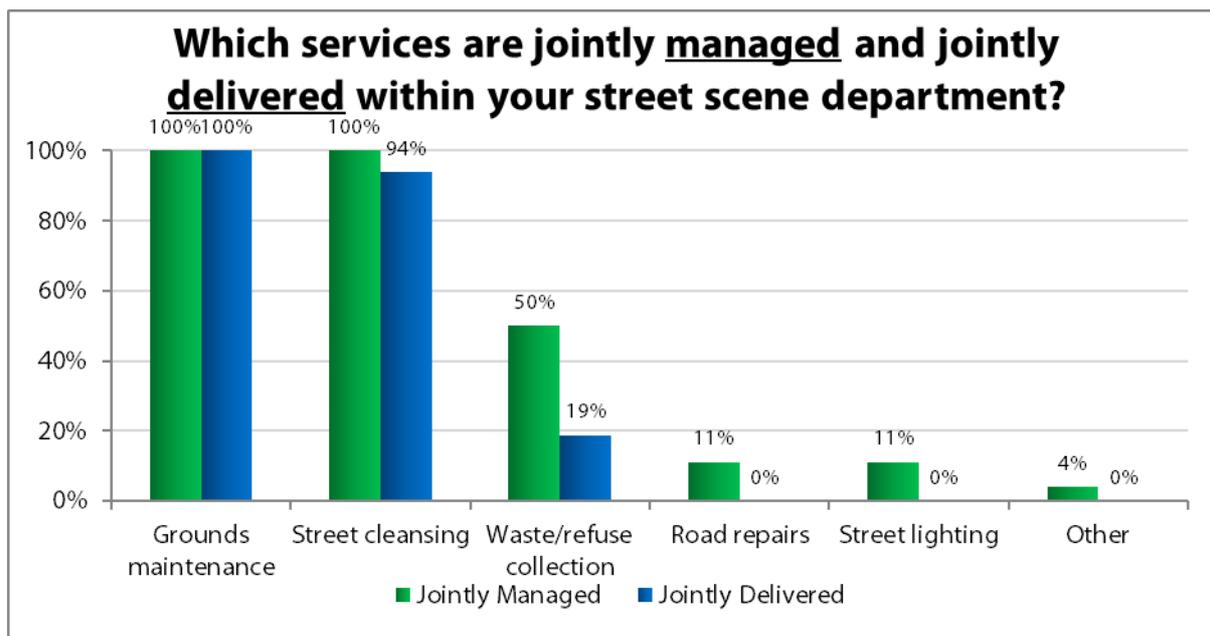
Almost 83% of respondents make a specific provision for promoting biodiversity in parks and green spaces (80% in 2018). Of those that make specific provisions, the respondents have carried out the following:-



There has been significant increases in holding biodiversity events in parks, building biodiversity targets in parks strategies and pond creation.

g) Integrated street scene services

56% of respondents are already part of an integrated street scene service, as opposed to 42% in 2018. This integration involves the following services being jointly managed or delivered:



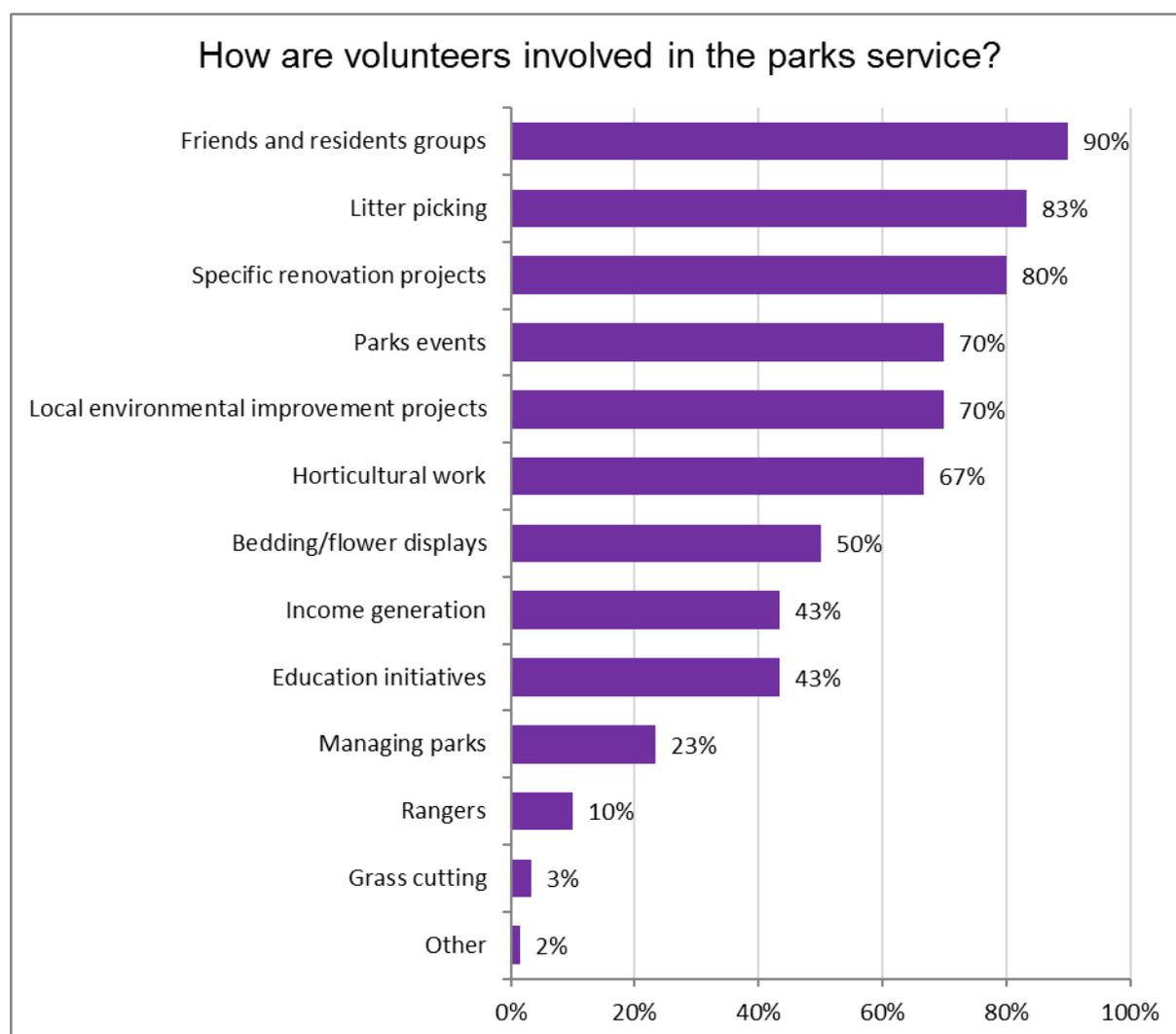
The largest areas of increase in the joint delivery of services are with regards to the integration of street cleansing and grounds maintenance.

Out of the respondents who answered that they are not already part of an integrated street scene service, 8% expect to become part of an integrated service in the near future a fall of 16% on 2018.

h) Community and volunteer involvement

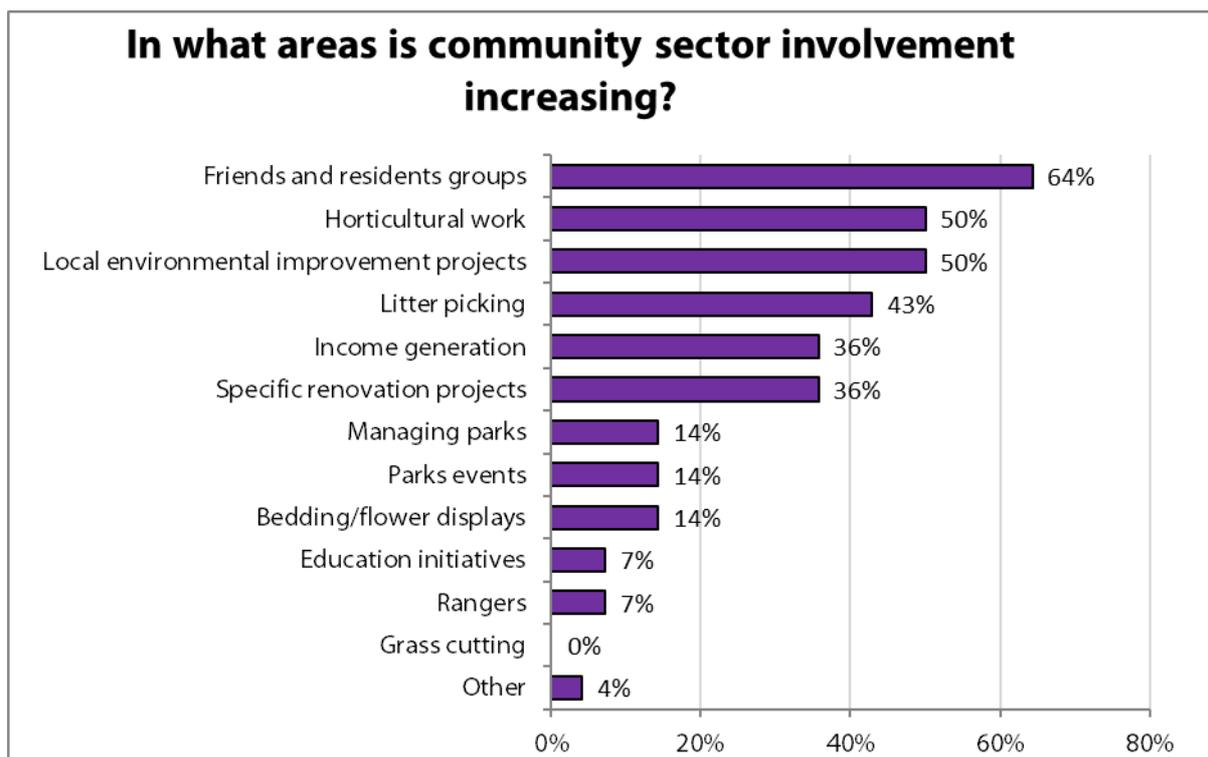
97% of respondents had friends of parks groups operating in their localities a rise of 6% on 2018 figures.

The survey asked how volunteers are involved in the parks service and results were as follows:

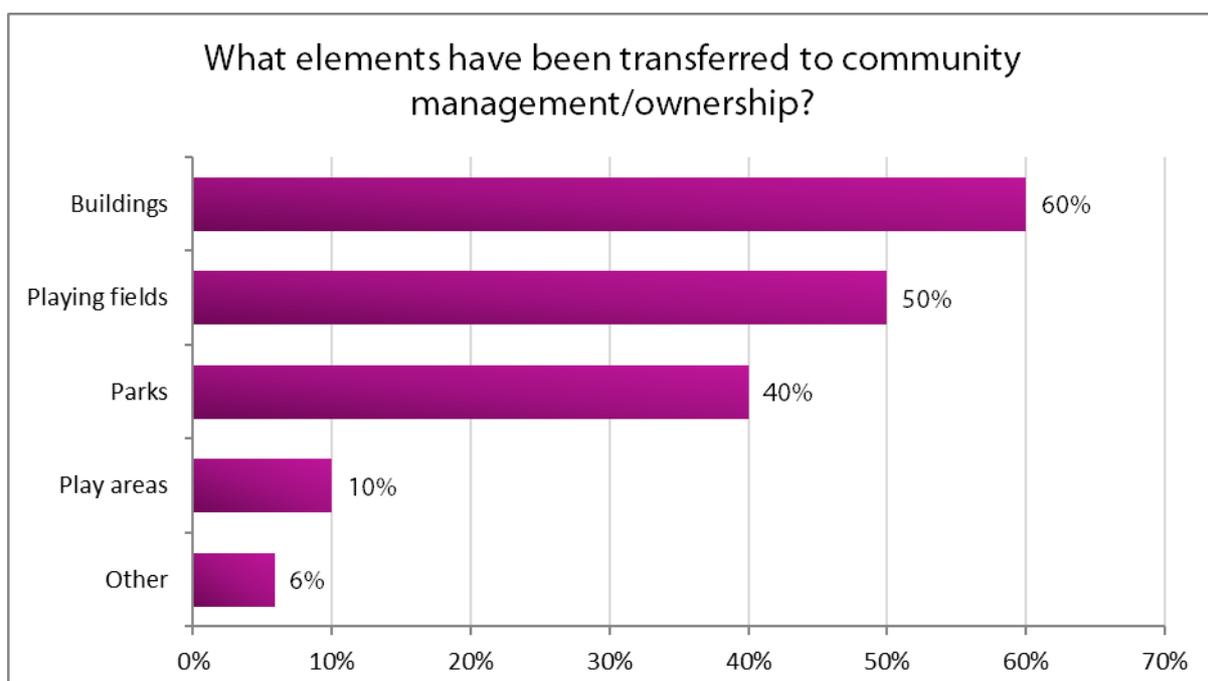


The results show that volunteers tend to be involved more in friends and residents groups (90%) and specific projects like parks events (69%). There has been a rise in the number of volunteers involved in litter picking, education initiatives, income generation and specific renovation projects.

45% of respondents thought that community sector involvement in parks is increasing either slightly or significantly in the following areas:

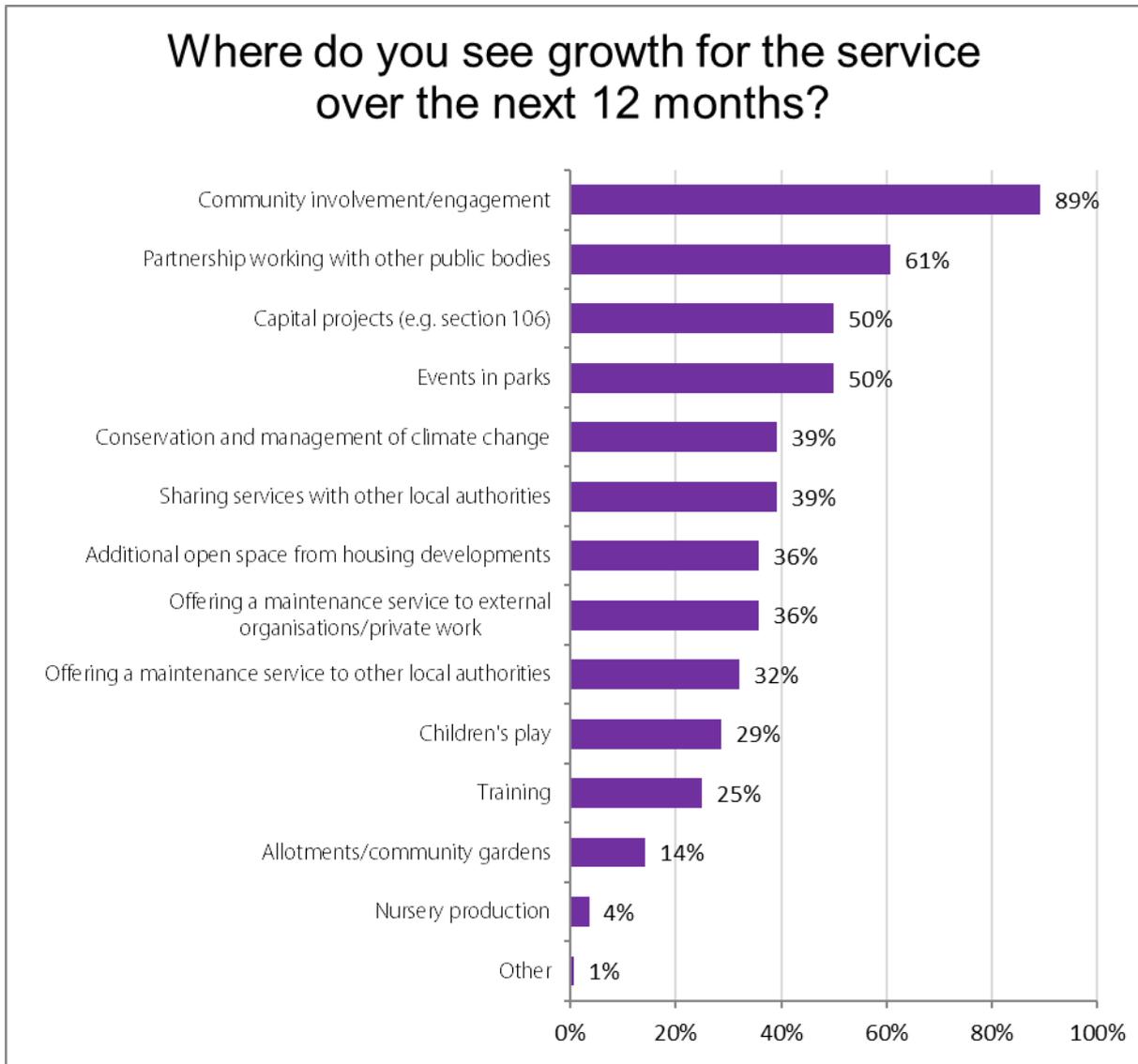


When asked 'during the past 2 years whether your council transferred any of its parks assets to community management/ownership', 33% said yes, a rise of 10% on 2018) and 27% said their council is looking at this (a 2% fall on 2018). Respondents stated that the following elements had been transferred to community ownership:



i) Future growth and decreases in work for the service

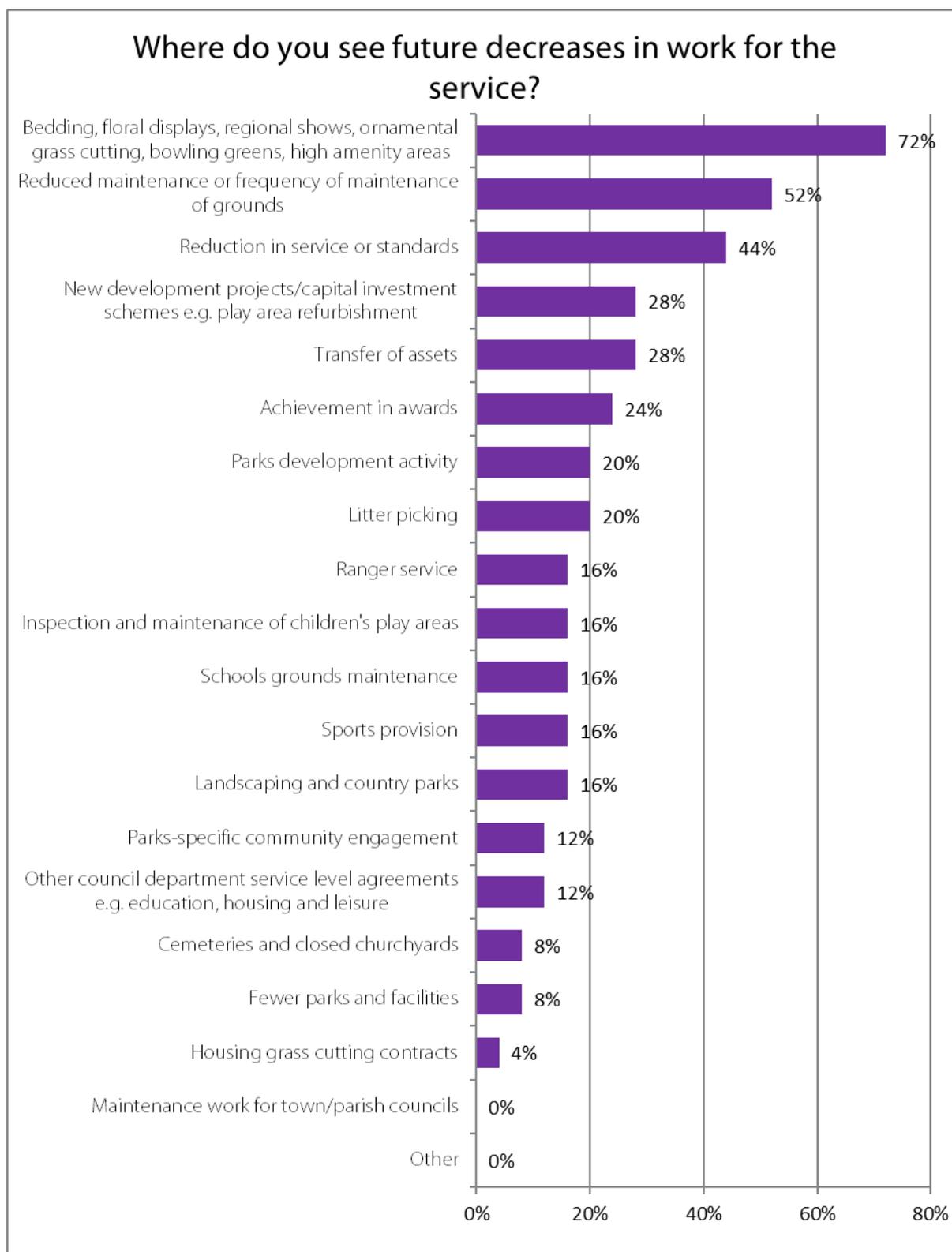
Respondents were asked where they saw growth for the service over the next 12 months and the results were as follows:



The most notable changes on 2018 are with regards to growth in the areas of community involvement/engagement 89%, partnership working with other public bodies and surprisingly a significant increase in conservation and management of climate change which has risen to 39% as opposed to 14% in 2018.

Notably the growth in training from 16% in 2018 to 25% in 2019 is reflective of the need to improve parks professional skills sets to meet all the new roles and responsibilities now required.

The survey also asked where they saw future decreases in work for the service and the breakdown is as follows:



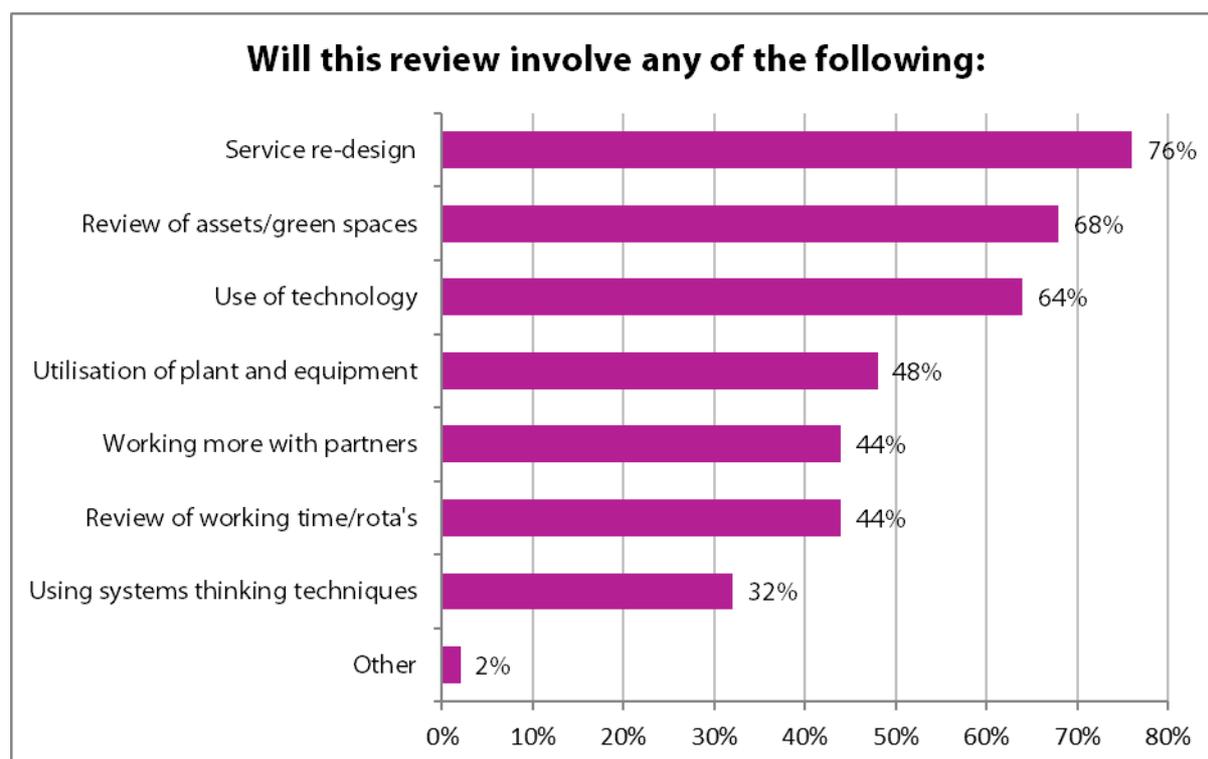
The most notable elements of this table when compared with 2018 results is that there are fewer instances where people see reductions in core work such as reductions in service standards, reduced maintenance frequencies, housing grass cutting contracts and maintenance work for town/parish councils.

This lack of respondents suggesting such areas will decrease compared to 2018 suggests that either standards are as low as they can go or there is optimism that these areas of work will not be cut any further.

j) Service reviews

38% of respondents had recently completed a service review (26% in 2018), 41% were currently underway (36% in 2018) and 17% plan to do so in the next 1-2 years. Only 4% recorded they had not or did not intend to undertake a service review.

According to respondents, these service reviews will involve the following:



APSE Comment

It is quite clear that despite ongoing service budget cuts, managers and front-line staff are continuing to provide quality parks and greenspaces. However, there is a real belief amongst parks professionals that service quality will diminish as a result of the ongoing pressures on budgets, changes to maintenance frequencies and a need for investment.

Based on some of the results there does seem to be some hope that the scale of budget cuts are reducing and in some case budgets are actually increasing, although they will need to be sustained if the losses experienced over the last few years are to be recovered.

Local councils are working hard to meet these challenges through making efficiencies and looking for income generation opportunities to plug funding gaps. It is therefore welcome that within the survey examples of income generation and the acquisition of additional funding is growing, as local authority parks staff become more adept at generating additional income. It is also noticeable that both elected members and the general public are seemingly more accepting of the need to generate income from within parks. This drive to generate income must not be allowed to become a barrier to free public access to the UK's parks and greenspaces.

As recent changes to local government finances indicate, councils will be increasingly reliant upon business rates retention and local housing taxation; the value of a quality greenspace should not be underestimated in its ability to attract commercial investment and new housing developments. Therefore, ongoing cuts to these services could have much wider implications for local councils if this leads to areas being unattractive to new businesses, as well as new residential areas.

The growing need to recognise the value of our parks and greenspaces both to public well-being and health and also to our local economies, has been increased following the 2017 Parks Inquiry reports and is now firmly on the Government's agenda through the work of 'The Parks Action Group' on which APSE represents its member local councils. The recent announcement of over £13 million pounds to help those parks in need of renovation is welcome but falls well short of the hundreds of millions of pounds which has been lost from parks budgets over the past decade.

It is apparent that the use of volunteers is growing in importance, however it has to be realised that these resources are often only available for localised projects and will not be enough to be a credible alternative to area-wide front-line local authority staff. Therefore the transferring of responsibility of our greenspaces needs to be considered carefully if free access is to be maintained. The Parks Inquiry report, although considering the need for mixed models in parks management, nevertheless still points towards ownership of parks being the role of local authorities, where the skills and resources still lie.

It is not surprising that reducing standards and reduced facilities are common themes in comments recorded in the survey. As a result of ongoing budget cuts it will be critical that service resources are targeted more effectively in those areas where public use and greenspace maintenance need is at its highest. Therefore new management approaches may need to be introduced which allow reduced costs whilst still maintaining quality, for example such as moving towards naturalised planting, wild flower meadows and so forth.

There is a growing demand from the public for access to greenspaces as our roads become congested and financial constraints in the home mean people are more-need of free access to pleasant and accessible greenspaces. Local authorities are successfully introducing new and innovative ways to sustainably manage parks whether this be through income generation, partnerships or alternative forms of funding. Local councils are also promoting the multiple benefits that greenspaces provide to other stakeholders and gaining funding from these sources in recognition of these benefits e.g. exercise and well-being, flood alleviation, climate change amelioration, social cohesion and so forth.

APSE feels there needs to be a balanced and proportionate response to the many concerns being raised about the future of the UK's public parks. From the results in this survey it is hoped that the positive and innovative work local authorities are continuing to deliver, as part of their desire to maintain cleaner, greener and safer parks and green spaces, and in spite of the impact of austerity, will come to fruition. It is envisaged that Government and other stakeholders will, in recognition of this innovation and best practice, ensure support for local authorities and their parks managers, in developing a sustainable future for the UK's parks.

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
- Cemeteries and crematoria
- Environmental health and trading standards
- Housing, construction and building maintenance
- Local authorities, 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

Wayne Priestley

APSE, Principal Advisor