apse membership resources

State of the Market Survey 2015

Local Authority Parks and Green Spaces Services

Briefing 15-28
May 2015

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Local Authority Parks and Green Spaces Services

State of the Market 2015

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

- 2013 results briefing
- 2012 results briefing
- 2010 results briefing
- 2008 results briefing

A total of 91 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	**37.4%**	**37.4%**	19.8%	1.1%	4.4%
Reductions in funding has resulted in a withdrawal of maintenance from some land and an increase in unmaintained land	34.1%	**42.9%**	20.9%	0.0%	2.2%
Lack of investment in parks and green spaces will have health and social impacts	**56.7%**	36.7%	3.3%	2.2%	1.1%
There is a clear link between parks/play provision and levels of crime/anti-social behaviour	31.5%	**43.8%**	9.0%	2.2%	13.5%
There's a limit to the extent to which volunteers can be involved in delivering parks and green space services	**61.8%**	25.8%	7.9%	2.2%	2.2%
The public should get free access to all parks	**61.1%**	27.8%	7.8%	2.2%	1.1%

74.8% either 'agree' or 'agree strongly' that 'the squeeze on public sector resources is affecting parks and green spaces disproportionately'. The reduction trend of respondents agreeing or agreeing strongly to this statement has reversed for the first time, rising by 9.4% since the 2013 survey, showing there is heightened concern about how the impact of ongoing cuts to parks budgets is now having.

A new question for 2013 was whether the reduction in funding has resulted in a withdrawal of maintenance and an increase in 'natural' areas. 77.0% of respondents either agreed or agreed strongly with this statement. This can be seen both as a threat to standards, or alternatively, if managed correctly, an opportunity to promote areas for wildlife and pollinator habitats.

The level of support for other questions which remained relatively consistent from the 2013 survey responses included: 'lack of investment in parks and green spaces will have health and social impacts', 'there is a clear link between parks/play provision and levels of crime/anti-social behaviour' and 'there is a limit to the extent which volunteers can be involved in delivering parks and green space services'. This is an interesting set of results, as it is obvious there are clear benefits to what green spaces can offer, yet in-spite of cuts, there is a view volunteering can only offer a limited contribution to offsetting these cuts.

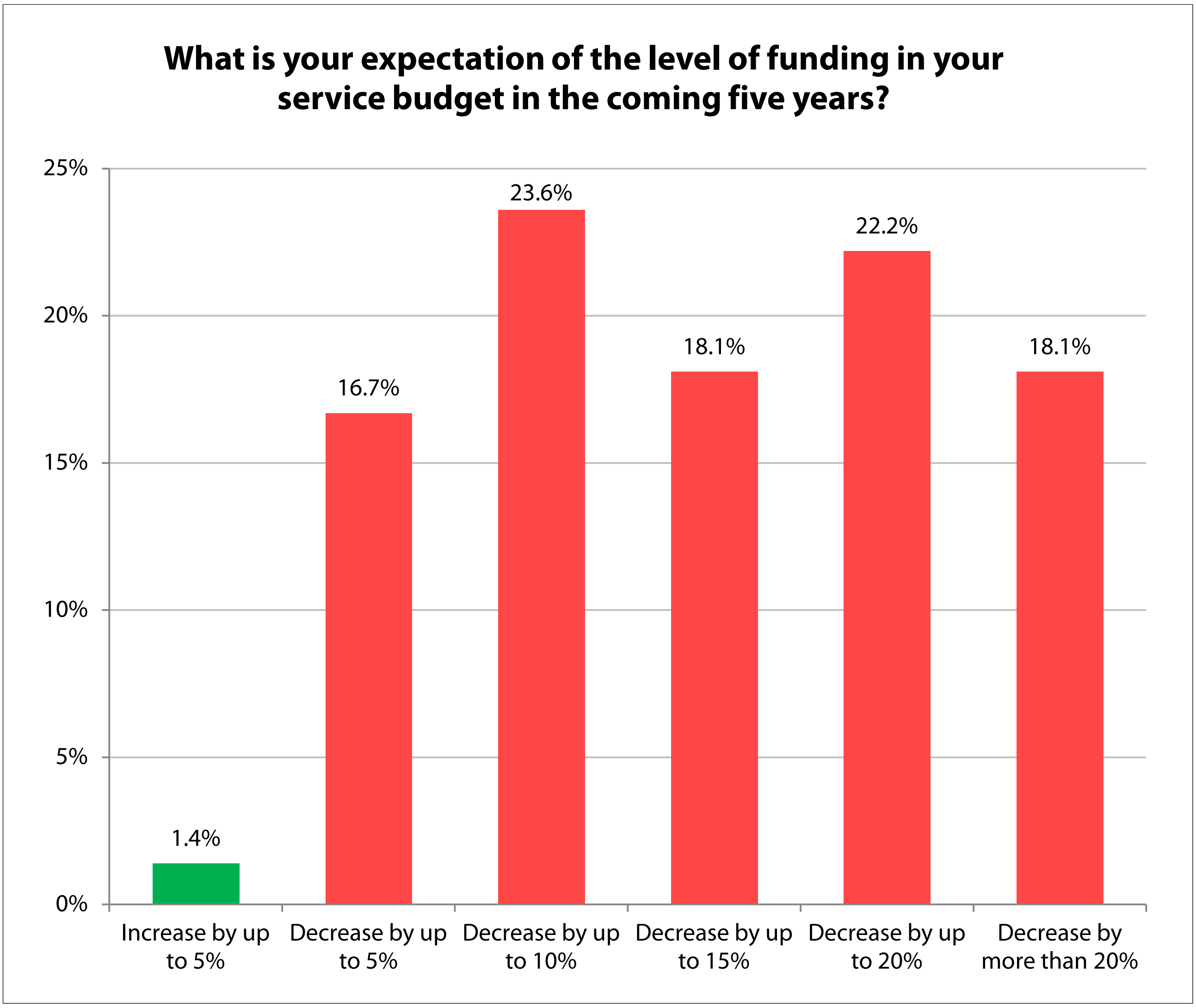
There has been a slight rise in the number of respondents agreeing or agreeing strongly with the statement that access to parks for the public should be free, with the response rate rising to 88.9% from 84% in 2013. This response is not surprising when the collective view is that parks and greenspaces have so much to offer in terms of health benefits, social cohesion and reductions in anti-social behaviour.

In 2013, a new question was introduced around what environmental issues are a priority for your parks and green space service. 'Litter control' and 'dog fouling' were the most frequent responses (each with a response rate of 84.3%) and therefore the respondents' top environmental priorities within the parks and green space services. This was closely followed by biodiversity (58.4%), water management (25.8%) and climate change (18.0%). It should be noted that whilst dog fouling and litter are important cleansing issues, equally climate change, water management and biodiversity are intrinsically linked and as such should not be seen as isolated issues but ones which if addressed have cross-cutting benefits, for example the creation of a wetland area or 'natural area' helps to create new wildlife habitats, acts as a flood alleviation opportunity, whilst absorbing carbon dioxide and reducing local temperatures.

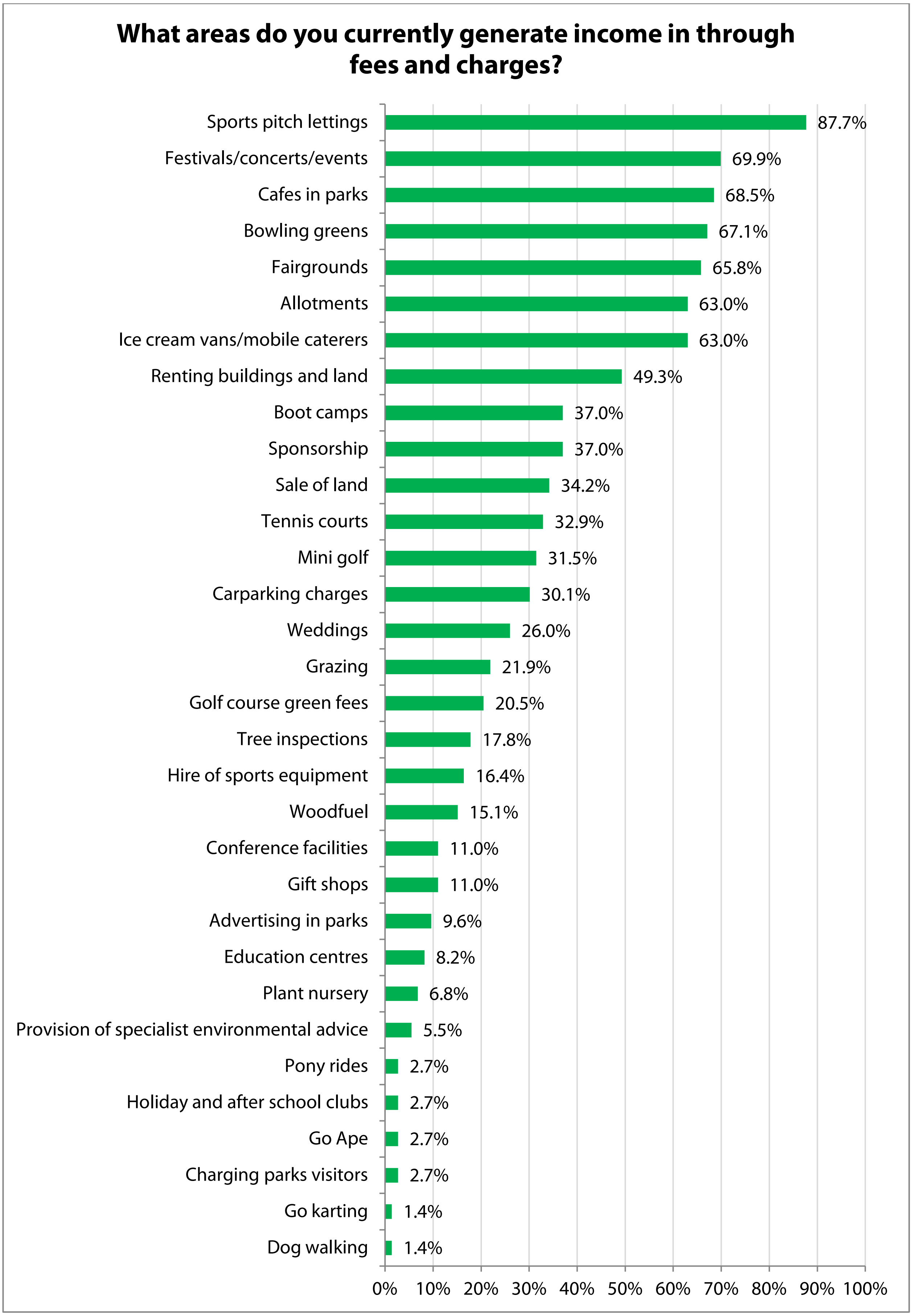
For the 2015 survey, we added a new question on the social issues that are a priority for your parks and green space services. The most frequent response was 'supporting healthy living' (92.2%) followed by 'promoting community cohesion' (60.0%) and 'reducing anti-social behaviour' (58.9%). Interestingly these are all individual key priorities for government funding, yet facilities such as parks and green spaces which address all three areas holistically, continue to suffer substantial budget cuts.

b) Budget expectations

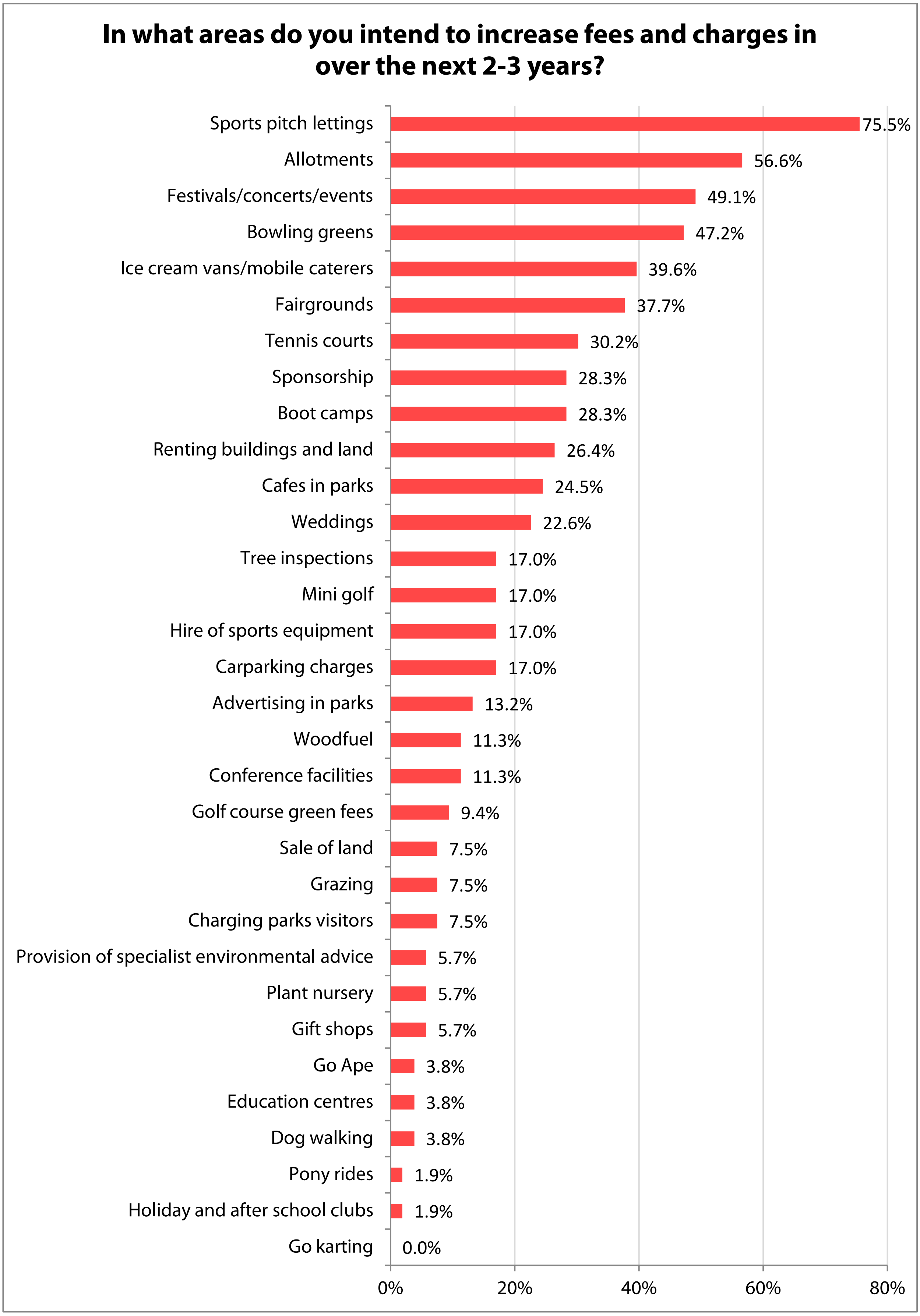
There has been a very slight rise in the percentage of respondents who expect the parks budget to change over the next year from 83.0% in 2013 to 84.0% in 2015. Of those who expected a change in the parks budget, 93.5% expect a decrease in revenue and 71.0% expect a decrease in capital. To meet efficiency pressures, 77.8% of respondents are intending to increase fees and charges over the next 2-3 years (a drop of 10% from 2012 survey). In the next 5 years, the expectation of the level of funding in parks and green spaces budgets is as follows:



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



77.8% of respondents intend to increase fees and charges over the next 2-3 years to meet efficiency pressures in the following areas:


In what areas do you intend to increase fees and charges in over the next 2-3 years?
Sports pitch lettings 75.5%
Allotments 56.6%
Festivals/concerts/events 49.1%
Bowling greens 47.2%
Ice cream vans/mobile caterers 39.6%
Fairgrounds 37.7%
Tennis courts 30.2%
Sponsorship 28.3%
Boot camps 28.3%
Renting buildings and land 26.4%
Cafes in parks 24.5%
Weddings 22.6%
Tree inspections 17.0%
Mini golf 17.0%
Hire of sports equipment 17.0%
Carparking charges 17.0%
Advertising in parks 13.2%
Woodfuel 11.3%
Conference facilities 11.3%
Golf course green fees 9.4%
Sale of land 7.5%
Grazing 7.5%
Charging parks visitors 7.5%
Provision of specialist environmental advice 5.7%
Plant nursery 5.7%
Gift shops 5.7%
Go Ape 3.8%
Education centres 3.8%
Dog walking 3.8%
Pony rides 1.9%
Holiday and after school clubs 1.9%
Go karting 0.0%
0%
20%
40%
60%
80%

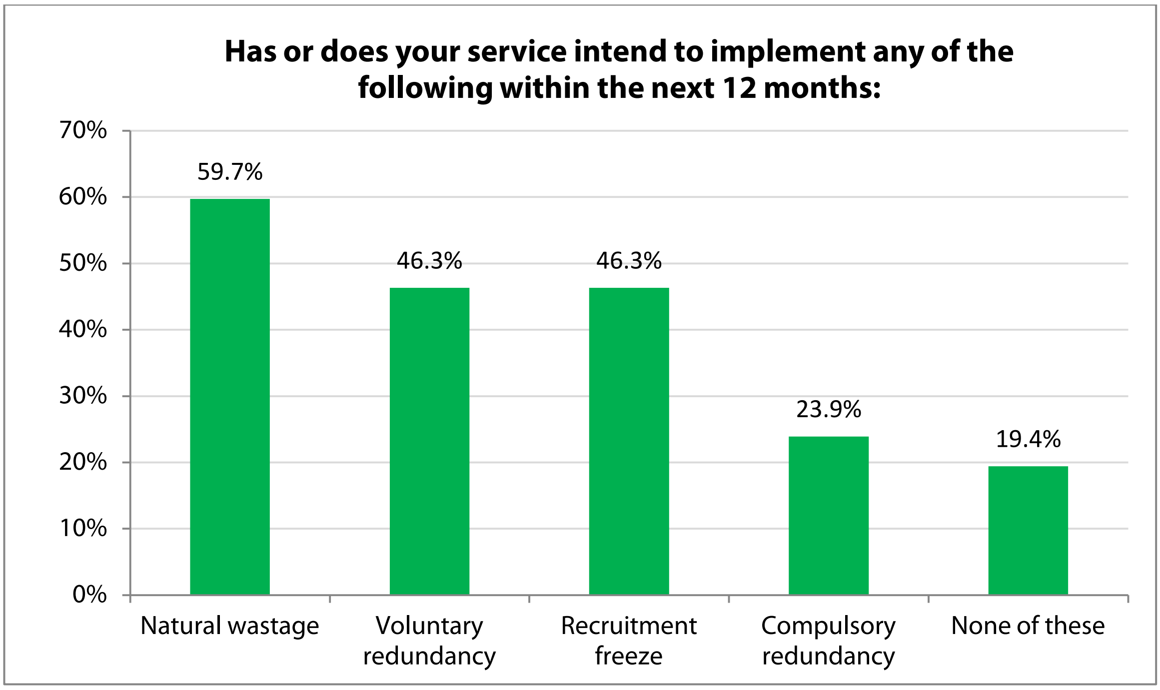
With many looking to increasingly generate income, we asked respondents what the barriers were to income generation in the local authority parks and green space service. The biggest barriers according to those that responded were 'competing priorities' (73.1%), 'experience of staff in bringing in new income' (52.2%), 'lack of time' (50.7%), 'political resistance' (46.3%), 'lack of investment funding' (41.8%) and 'public resistance' (34.3%). Other responses included a lack of assets (e.g. buildings/sport pitches) and a lack of footfall due to the rural nature of the area.

Aside from fees and charges income generating activity, the majority of parks obtain additional funding from section 106 money (91.4%). There has been a drop in the number of respondents stating the National Lottery Heritage Fund as a source of additional funding from 67.0% in 2013 to 58.6% in 2015. Friends of Parks groups continue to provide additional funding according to 62.9% of respondents along with grant funding from other trusts (58.6%). 31.4% of respondents obtain additional funding from the sale of assets (e.g. timber), and there are still a number of respondents accessing sponsorship (41.4%) and private funding (14.3%).

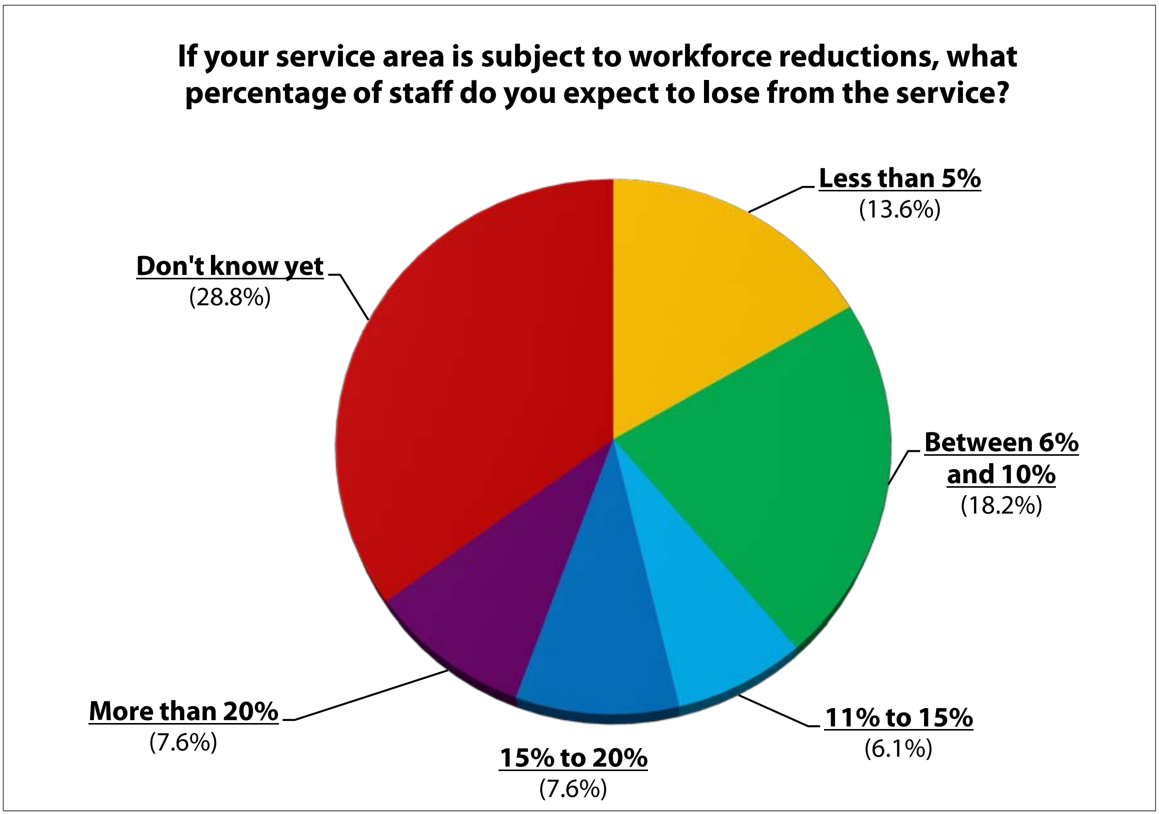
Respondents were asked whether they sold their services outside of the Local Authority. 32.9% currently sell services to the private sector (an increase from 31.4% in 2013), 27.4% currently sell to other local authorities and 31.5% currently sell to other public sector bodies.

c) Staffing

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



Respondents who were expecting staff reductions were asked what percentage of staff they expect to lose from the service, and the results were as follows:

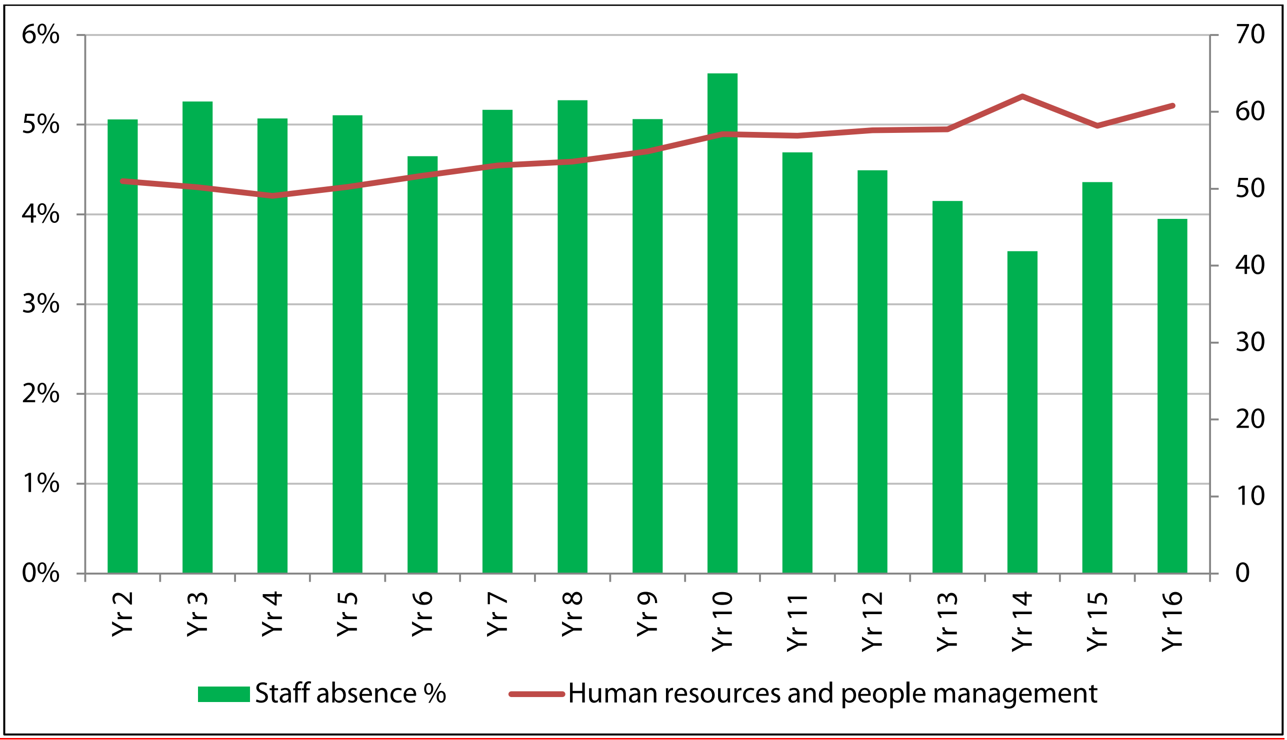


13.6% of respondents expected to lose 'less than 5%' of their workforce, 18.2% of respondents expected to lose 'between 6% and 10%' of their workforce, 6.1% of respondents expected to lose between '11% and 15%' of their workforce, 7.6% of respondents expected to lose between '15% and 20%' of their workforce, an additional 7.6% of respondents expected to lose more than 20% of their workforce and 28.8% of respondents didn't yet know. It is clear that despite the wide variations in levels of staff losses, the general trend is that parks staffing levels across local authorities is being reduced at a time when the cross cutting values of parks and green spaces is being highlighted via health, climate change and well-being research. Recent work by the Natural Capital Committee has emphasised the need to protect urban parks and green spaces because of them 'benefitting millions of people in our towns and cities' – *The State of Natural Capital – Protecting and Improving Natural Capital for Prosperity and Well Being (2014)*

Are staff absence levels at an acceptable level?	
Too high	13.8%
Slightly above average	18.5%
About average	**29.2%**
Slightly below average	18.5%
Very low	20.0%

There has been a drop in respondents reporting staff absence levels as about average (from 41.6%), an increase of 7.1% in those reporting a lower figure and an increase of 5.3% in those reporting a higher figure when compared with 2013 results.

APSE's benchmarking service Performance Networks has shown an improvement in staff absence now standing at 3.95% for Year 16. In conjunction with this, local authority parks services have improved their performance on last year in human resources and people management (investment in training, development and health and safety) with a figure of 60.81. The following chart has been extracted from APSE Performance Networks data collected between Years 2 and 16.

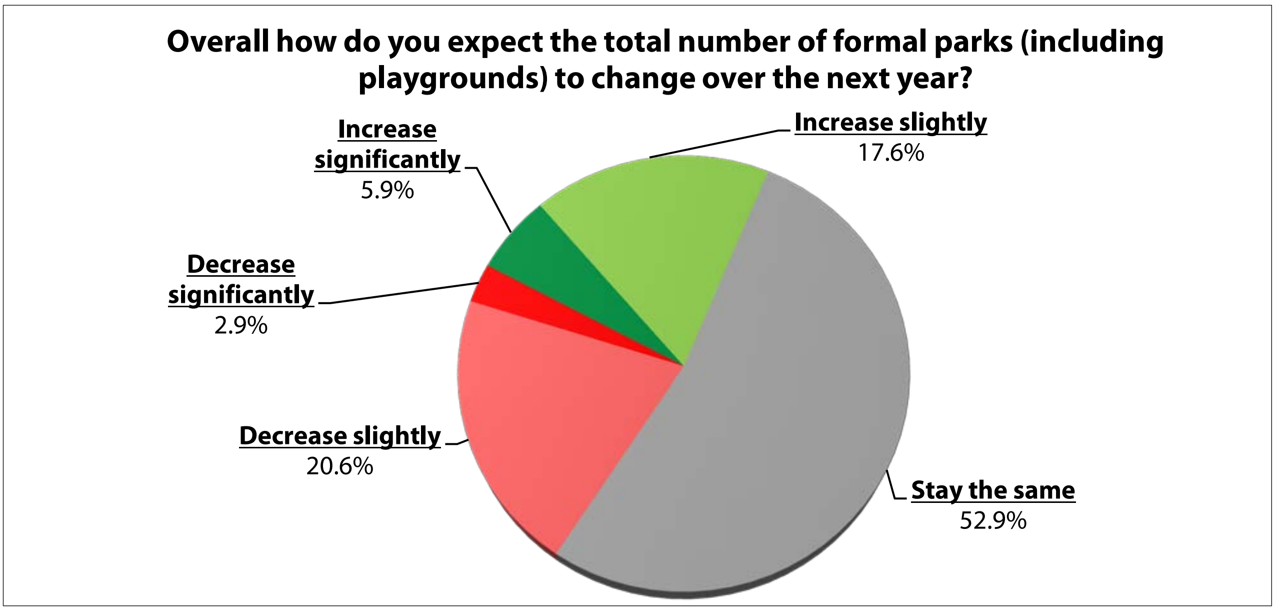


In terms of staff training, 63.2% thought that the training budget will stay the same over the next 12 months and 35.3% thought it was going to decrease.

The survey found 67.6% of respondents stated that they currently have apprentices and 54.0% are planning to recruit apprentices in 2015-16. Of those that hadn't retained all apprentices from the last recruitment round, a common theme was the inability to guarantee positions at the end of apprenticeships and the need for apprentices to apply for any vacancies alongside external candidates. This could be seen as a worrying trend, particularly in a workforce which has an ageing profile, where a lack of younger entrants with requisite skills could mean poorer maintenance standards in the future.

d) Numbers of parks and visitor numbers

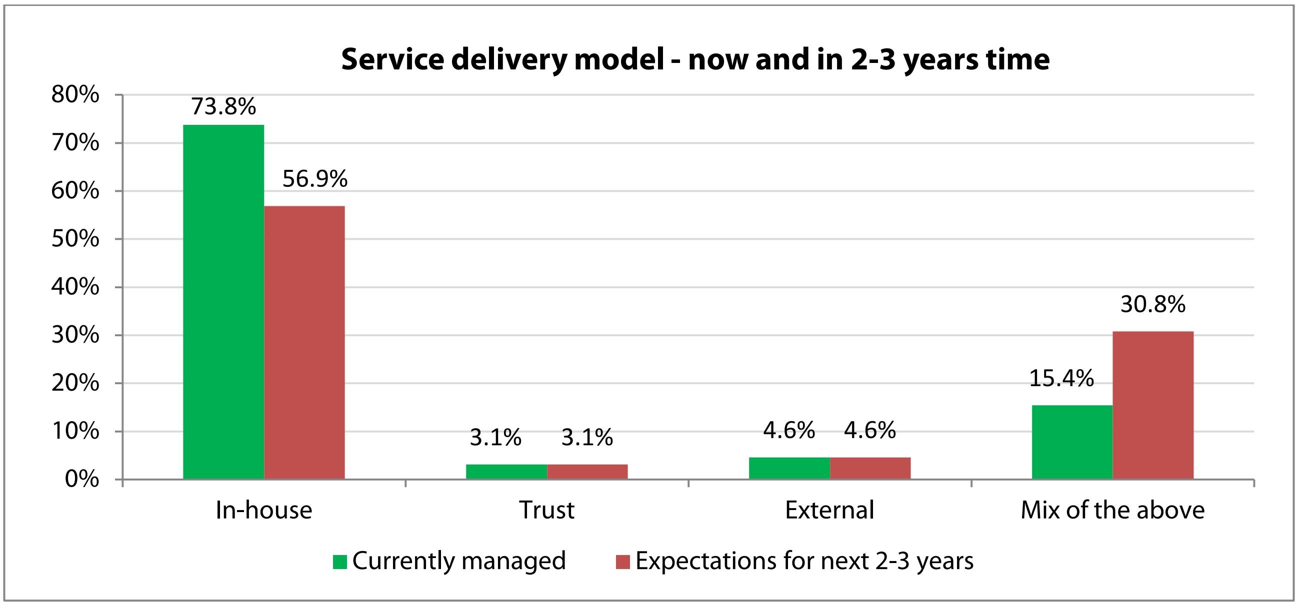
The State of the Market survey has tracked the change in response since 2008 to the question 'Overall how do you expect the total number of parks (including playgrounds) to change over the next year?' 52.9% of respondents expected the total number to stay the same (compared to 44% in 2013), with 23.5% expecting a slight or significant increase and the remaining 23.5% expecting a slight or significant decrease over the next year.



When asked about the number of visitors to formal parks during the past year, 59.7% believed numbers had increased and 38.8% believed it had stayed the same, although only 26.9% of respondents monitor visitor numbers. There is clearly a need where practicable to monitor visitor numbers to be able to justify future budgets and future investment in parks.

e) Service delivery

Whilst 73.8% currently have in-house services, only 56.9% expect to be managed in-house in the next 2-3 years. When asked how respondents expected the service to be managed in the near future, 30.8% expected a mix of in-house, trust, external and community management. The actual percentage has remained broadly similar, but with a 9.2% drop in those with current in-house services since the 2013 survey.



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:

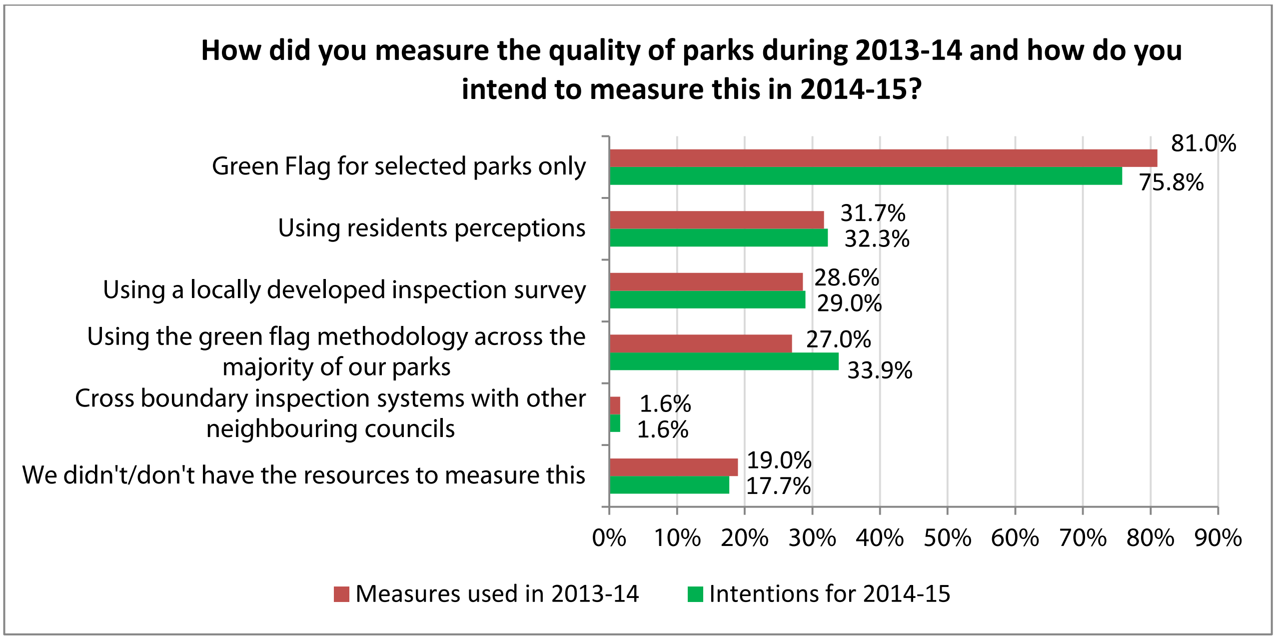
- 40.6% reported to having park rangers, which is the lowest response recorded.
- 61.5% have parks management plans in place
- 58.1% have dog control orders in parks and green spaces and 50.0% have on the spot fines for litter. Both a slight decrease from the levels reported in 2013.
- 68.8% have seasonal labour (compared to 70.8% in 2013). Of those who have seasonal labour, on average 24% of their workforce are employed on these terms.
- 64.1% have annualised hours (compared to 59.1% in 2013). Of those who have annualised hours, on average 70% of their workforce are employed on these terms.

f) Service standards and quality of service

The survey asked, over the past year, which services have increased, decreased and stayed the same. The main areas of increase were events (36.5%) and tree inspections (20.6%). The main areas of decrease were bedding/flower displays (66.7%), shrub bed maintenance (49.2%) and frequency of grass cuts (amenity - 44.4%). Over 80% of respondents stated the maintenance of play equipment and play inspections have stayed the same. These figures reflect how parks managers are ensuring income opportunities are pursued whilst ensuring areas of risk are well managed. Of some concern are the reductions in maintenance of formal horticultural features, which to many people, are still an important part of their parks experience.

In this years' survey, we asked for respondents to state their average number of grass cuts (amenity) per annum. Although this is a very difficult thing to ask as a number of cuts depends on weather conditions and land use, 25.9% stated 10 cuts or less, 37.0% stated 11-15 cuts per annum, 25.9% stated 16 to 20 cuts and 11.1% stated they cut their amenity sites grass 21 times or more. 15.0% used Cylinder machines for estate and highways grass cuts, 20.0% used Rotary, 1.7% used Flail and 63.3% used a mixture of the above.

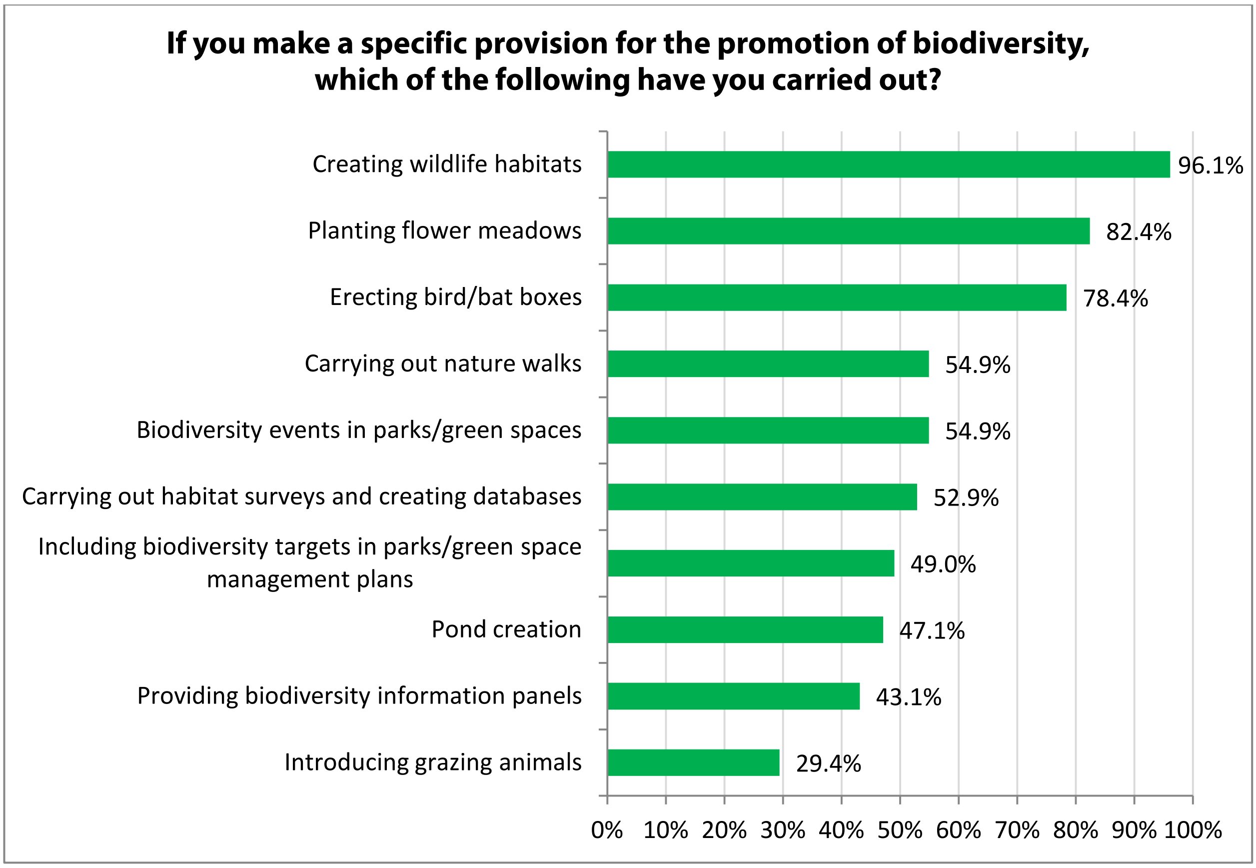
The survey asked how quality of parks was measured during 2013-14 and the results were as follows:



The same questions were asked in terms of how quality of parks is intended to be measured in 2014-15 which saw slight increases in 'using the green flag methodology across the majority of our parks', 'using residents perceptions' and 'using a locally developed survey'. Respondents intended to reduce the use of 'green flag for selected parks only' and several noted their plans to make use of APSE developed customer satisfaction surveys. APSE believes that it is vitally important within the current economic climate for Councils to continue to measure the quality of parks services for both managing the service effectively and to assess changes in service provision against other data such as the cost of service and customer satisfaction. APSE offers a performance benchmarking service for parks, horticulture and open spaces called Performance Networks. APSE has also been working with local authorities in England and Scotland to develop a simple tool to use land audit management system (LAMS) which allows local authority officers or their representatives, to survey the quality of the local environment. It can be used to measure ground maintenance standards such as those found in parks, or can be used more widely to measure grounds maintenance and street cleansing standards. A successful pilot study has just been completed and APSE is publicising its wide-ranging value amongst local authority members. Further details can be found by clicking here.

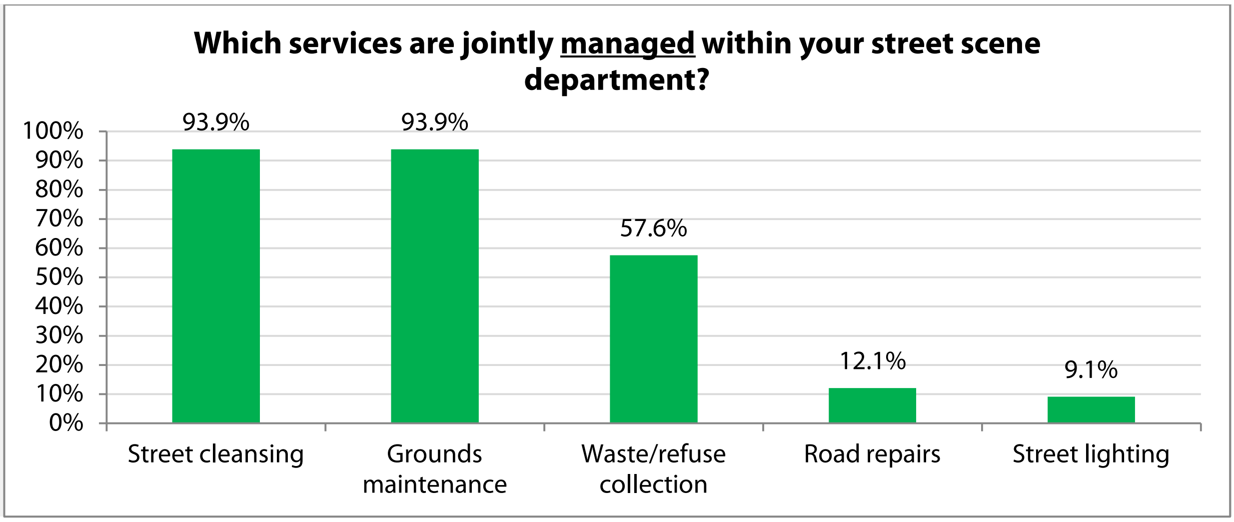
g) Biodiversity

80.6% of respondents make a specific provision for promoting biodiversity in parks and green spaces. Of those that make specific provisions, the respondents have carried out the following:

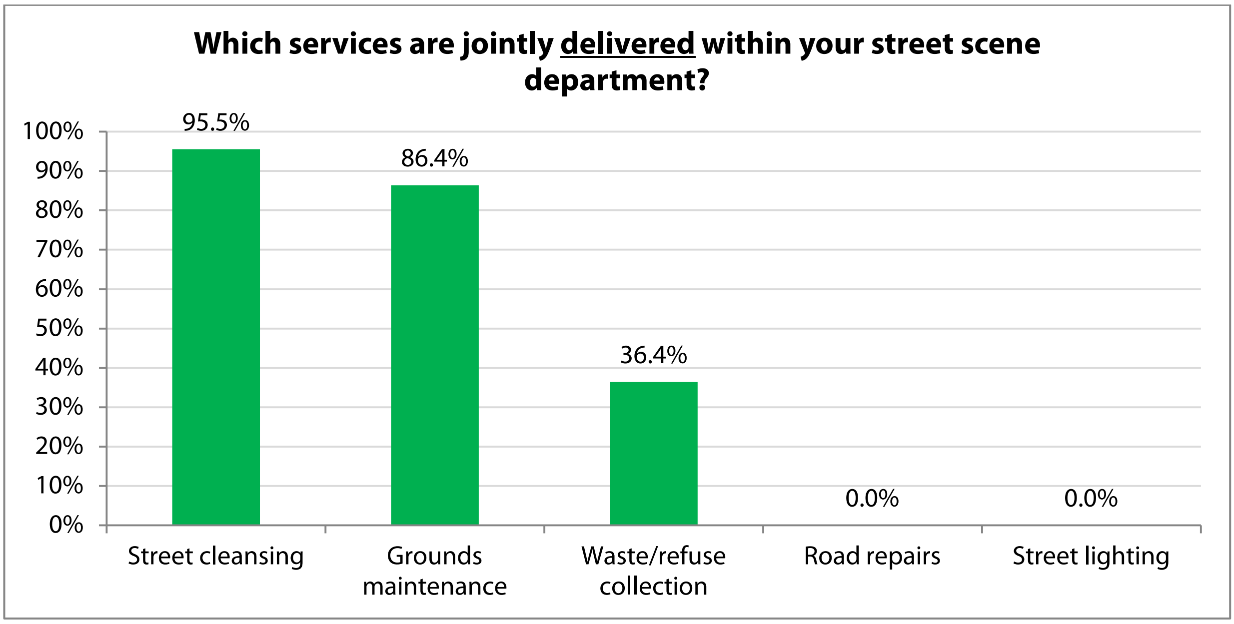


h) Street scene

53.2% are already part of an integrated street scene service, a decrease from last year, which involves the following services being jointly managed:



The survey also asked which services are jointly delivered by staff and the results were as follows:

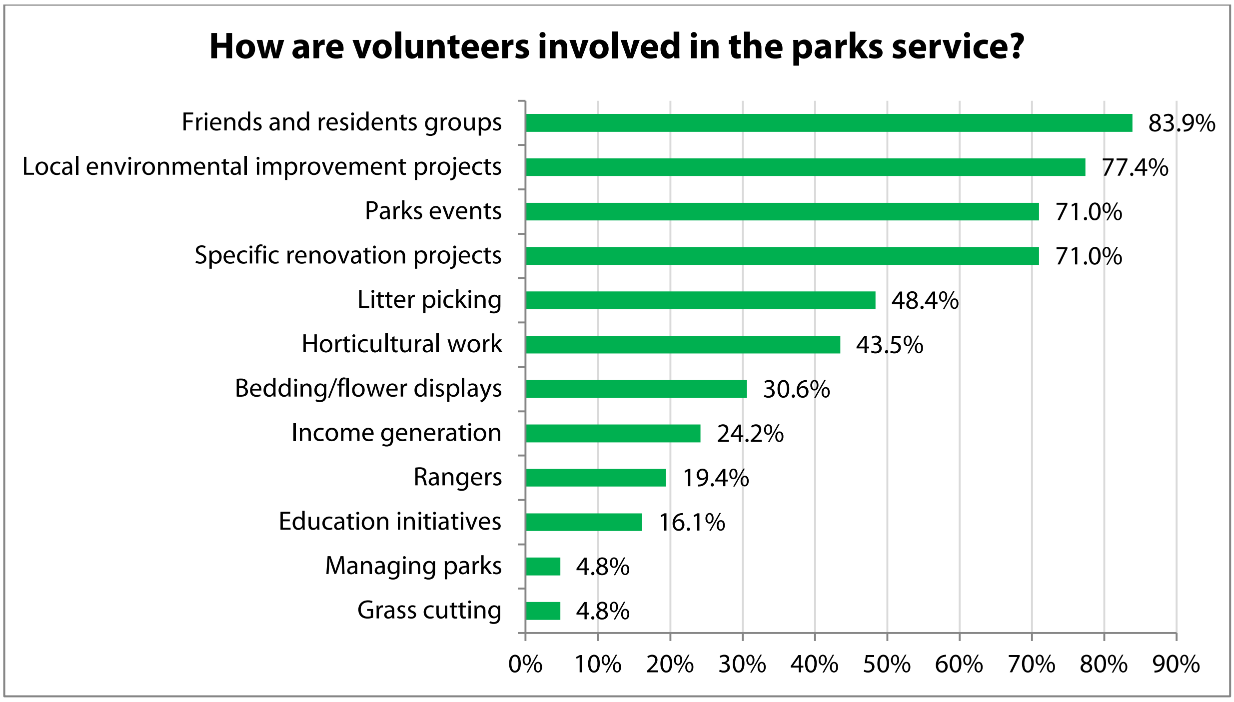


The largest areas of decrease in the joint delivery of services since 2013 were in the joint delivery of road repairs and street lighting, which fell 21.4% and 9.5% respectively; the management of these services also fell by 16.5% and 10.5% respectively.

Out of those respondents who answered that they are not already part of an integrated street scene service, 38.2% expect to become part of an integrated service in the near future (a rise of 11.4% from the 2013 survey).

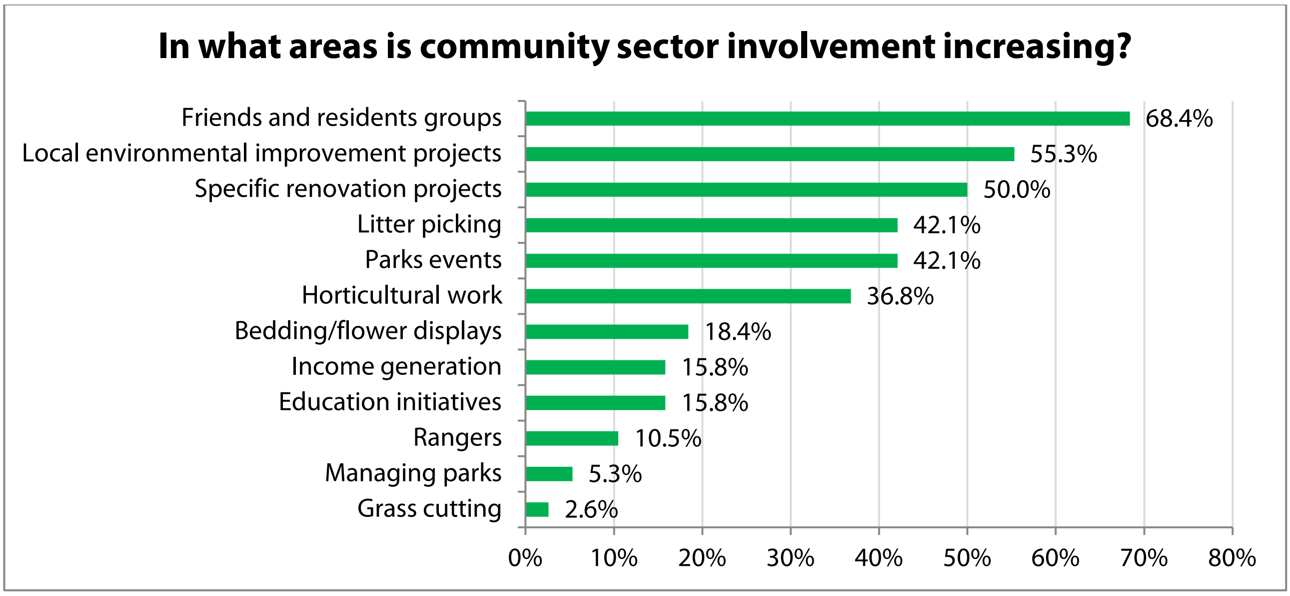
i) Community and volunteer involvement

95.2% of respondents had friends of parks groups operating in their localities. The survey asked how volunteers are involved in the parks service and results were as follows:



The results show that volunteers tend to be involved more in decision making forums (such as friends and residents groups) and specific projects rather than carrying out actual maintenance or horticultural work, but there has been a noticeable rise in the number of volunteers involved in those areas since the 2013 survey (with a 13.8% rise in horticultural work and a 7.2% rise in bedding/flower displays since 2013 and 71.0% involved in litter picking).

60.3% of respondents thought that the community sector involvement in parks is increasing.



When asked 'during the past 2 years' whether your council transferred any of its parks assets to community management/ownership', 19.0% said yes – a decrease of 8.3% compared to the 2013 survey response. Additionally, 36.5% answered that their Council is looking at this option. Of those who answered yes, respondents stated the following elements as been transferred:

What elements have been transferred to community management/ownership?	
Playing fields	61.5%
Buildings	53.8%
Parks	15.4%
Play areas	7.7%

j) Future growth and decreases in work for the service

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

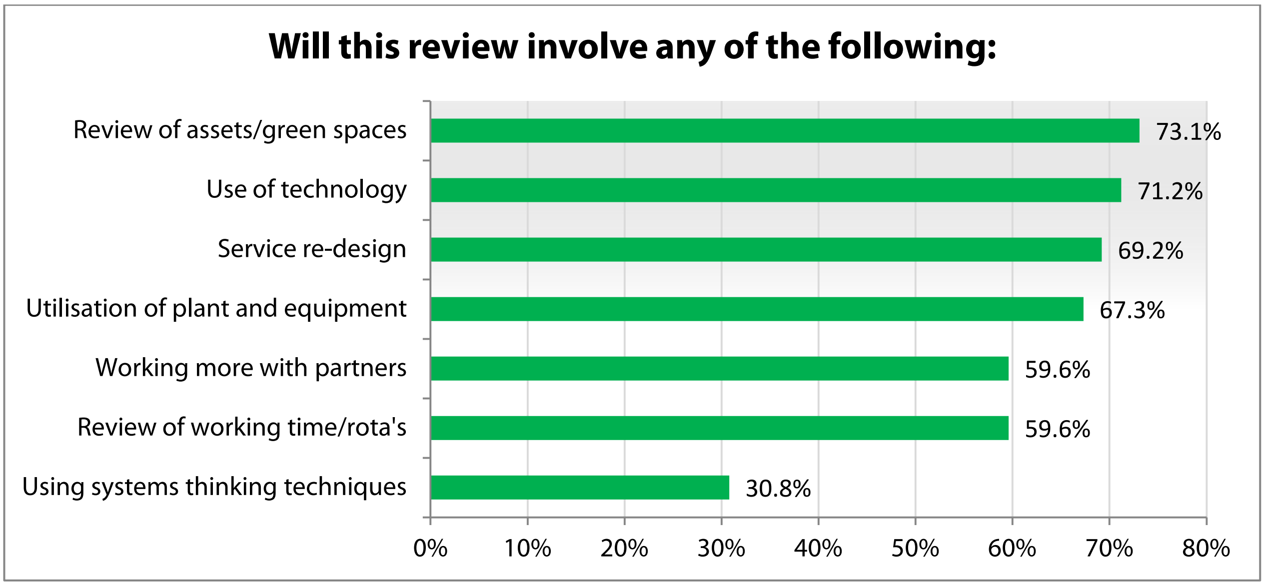
Where do you see growth for the service over the next 12 months?	
Community involvement/engagement	70.5%
Partnership working with other public bodies	44.3%
Sharing services with other local authorities	42.6%
Capital projects (e.g. section 106)	41.0%
Events in parks	36.1%
Additional open space from housing developments	36.1%
Offering a maintenance service to external organisations/private work	31.1%
Offering a maintenance service to other local authorities	23.0%
Allotments/community gardens	18.0%
Conservation and management of climate change	16.4%
Training	14.8%
Children's play	13.1%
Nursery production	4.9%

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

Where do you see future decreases in work for the service?	
Reduced maintenance or frequency of maintenance of grounds	79.7%
Bedding, floral displays, regional shows, ornamental grass cutting, bowling greens, high amenity areas	74.6%
Reduction in service or standards	71.2%
Parks development activity	42.4%
Litter picking	40.7%
Achievement in awards	37.3%
Transfer of assets	35.6%
Sports provision	33.9%
New development projects/capital investment schemes e.g. play area refurbishment	30.5%
Fewer parks and facilities	27.1%
Landscaping and country parks	23.7%
Other council department service level agreements e.g. education, housing and leisure	23.7%
Ranger service	23.7%
Parks-specific community engagement	16.9%
Cemeteries and closed churchyards	15.3%
Schools grounds maintenance	13.6%
Housing grass cutting contracts	13.6%
Inspection and maintenance of children's play areas	8.5%
Maintenance work for town/parish councils	6.8%

k) Service reviews

32.8% of respondents had recently completed a service review, 31.1% were currently underway and 23.0% plan to do so in the next 1-2 years. According to respondents, these service reviews will involve the following:



APSE and Parks Services

APSE member authorities have access to a wide range of membership resources to assist in delivering council services including parks and open spaces. 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
- Housing, construction and building maintenance
- Parks, horticultural and ground maintenance
- Renewables and climate change
- Roads, highways and street lighting
- Service delivery models
- Service transformation and performance management
- 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 2015 please contact Wayne Priestley Principal Advisor for Environmental Services at wpriestley@apse.org.uk