membership resources

State of the Market Survey 2017

Local Authority Parks and Green Spaces Services

Briefing 17-13
April 2017

The state of the market survey was conducted by Wayne Priestley, APSE Principal Advisor for Environmental services and Garry Lee, Research & Coordination Officer.

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

Tel: 0161 772 1810
Email: wpriestley@apse.org.uk

Local Authority Parks and Green Spaces Services
State of the Market 2016

APSE conducted an online survey during December and February 2017. This follows on from the 2016, 2015, 2013, 2012, 2010 and 2008 Parks and Green Spaces State of the Market survey where similar questions were asked to allow for trend comparisons. These briefings can be accessed at the links below:

- 2015 results briefing
- 2013 results briefing
- 2012 results briefing
- 2010 results briefing
- 2008 results briefing

93 responses were received from local authorities throughout the UK which is a **32% increase** on 2016. This report identifies the key findings of the survey compared with previous findings.

Results from the survey

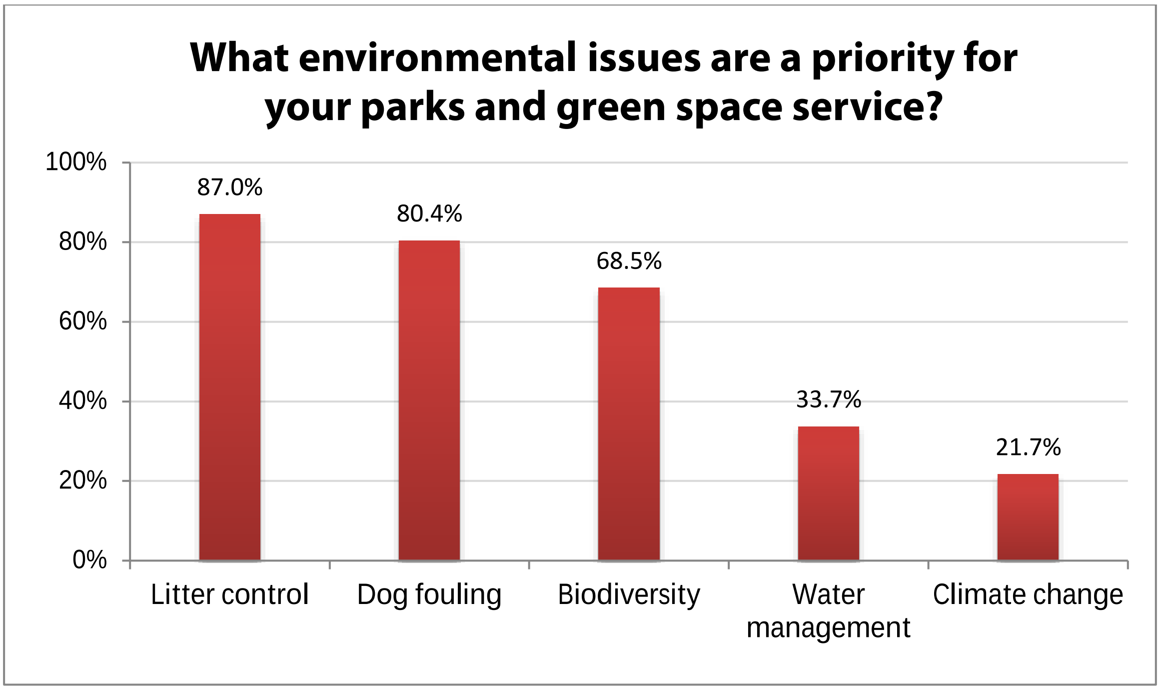
a) Your opinions

The table below shows the number of respondents who agree/disagree with the statements:

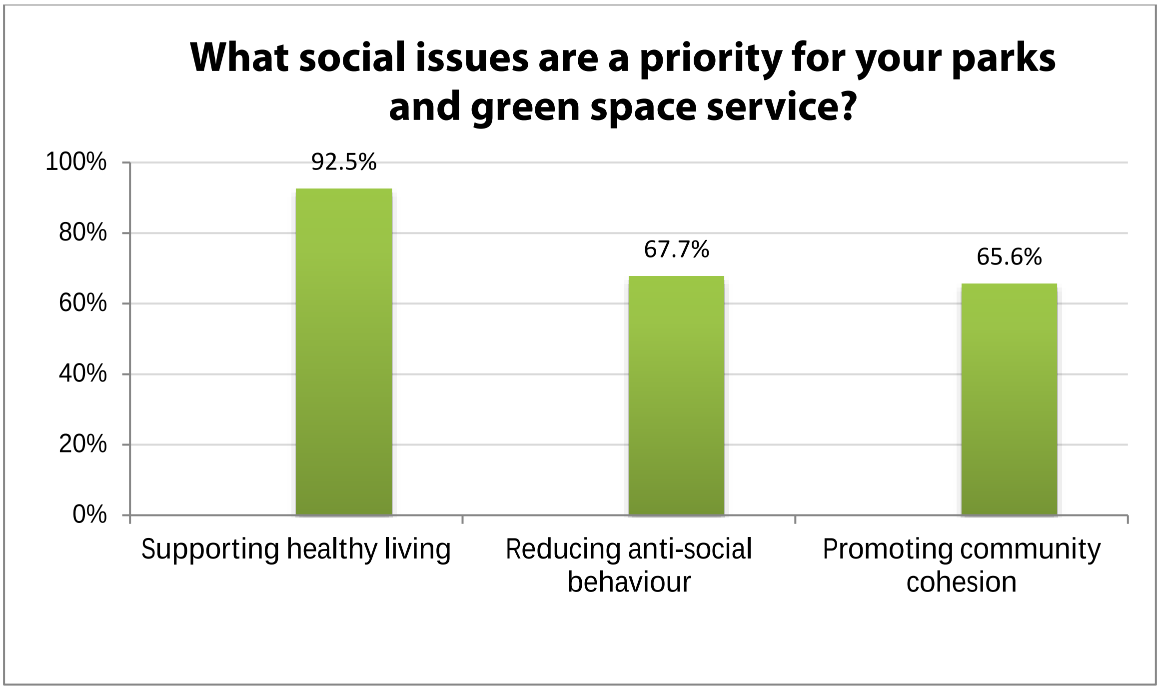
Answer Options	Agree strongly	Agree	Disagree	Disagree strongly	No opinion
The squeeze on public sector resources is affecting parks and green spaces disproportionately to other service areas	40%	40%	18%	1%	1%
Reductions in funding has resulted in a withdrawal of maintenance from some land and an increase in unmaintained land	41%	37%	17%	1%	3%
Lack of investment in parks and green spaces will have health and social impacts	69%	25%	3%	1%	2%
There is a clear link between parks/play provision and levels of crime/anti-social behaviour	30%	42%	7%	1%	20%
There's a limit to the extent to which volunteers can be involved in delivering parks and green space services	54%	43%	3%	0%	0%
The public should get free access to all parks	59%	31%	8%	1%	1%

There has been a slight rise from 78.1% to 80% 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. Surprisingly there has been a fall 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 fall is from 85.9% in 2016 to 78% in 2017.

94% either 'agree' or 'agree strongly' that the 'lack of investment in parks and green spaces will have health and social impacts' which is roughly the same as last year's results. 72% 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 3% fall on last year's figure. There has been a significant rise from 91% to 97% in the amount of respondents who 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'. 90% either 'agree' or 'agree strongly' that 'the public should get free access to all parks which is a 2.5% rise on last years figures.



The main environmental priority for parks and green space services remains 'litter control' (87%), with 'dog fouling' a close second, actually increasing by over 7% on last year's returns from 73% to 80.4%. The importance of promoting biodiversity has again risen. However notably there has been a decline in the importance and the value of parks as ameliorating the effects of climate change' over 15% from last year's figures, although water management has retained its importance with the same number of respondents identifying it as a priority. These increases are undoubtedly a reflection of the public's growing concern about declining biodiversity and the recent extreme weather conditions resulting in incidents of severe flooding in many areas. Parks and greenspaces are now being seen as major resources in promoting biodiversity and combatting the more extreme effects of climate change.

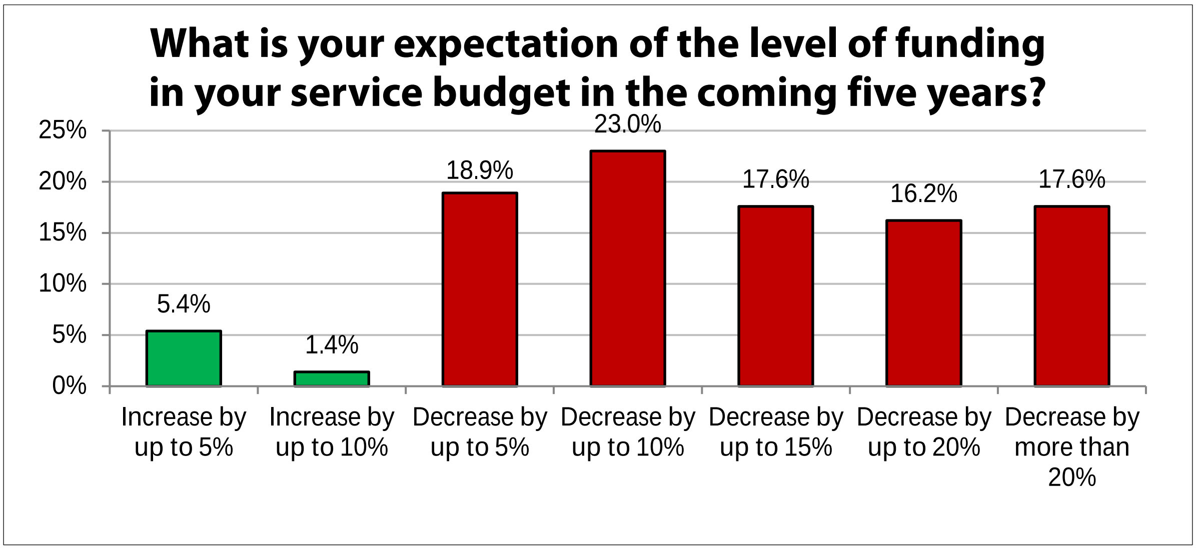


For the 2015 survey, we added a question on the social issues that are a priority for your parks and green space service. The most frequent response was 'supporting healthy living' which has increased this year by 3.5% on last year's figures. (88.9% to 92.5%), followed by 'reducing anti-social behaviour' up nearly 14% on last year's figures and 'promoting community cohesion' which has also risen by 5% against last year's returns. Additional responses received included improving children's play options and creating beautiful areas to relax in.

Budget expectations

The number of respondents who expect the parks and green space budget to change over the next year has increased significantly from last year rising from 83% in 2016 to 92% in 2016/17. Of those who expected a change in the budget, 86% expect a decrease in revenue, which is an improvement on 2016 when 93% expected a decrease, and 67% expect a decrease in capital which is roughly in line with 2016.

In the next 5 years, the expectation of the level of funding in budgets are as follows:

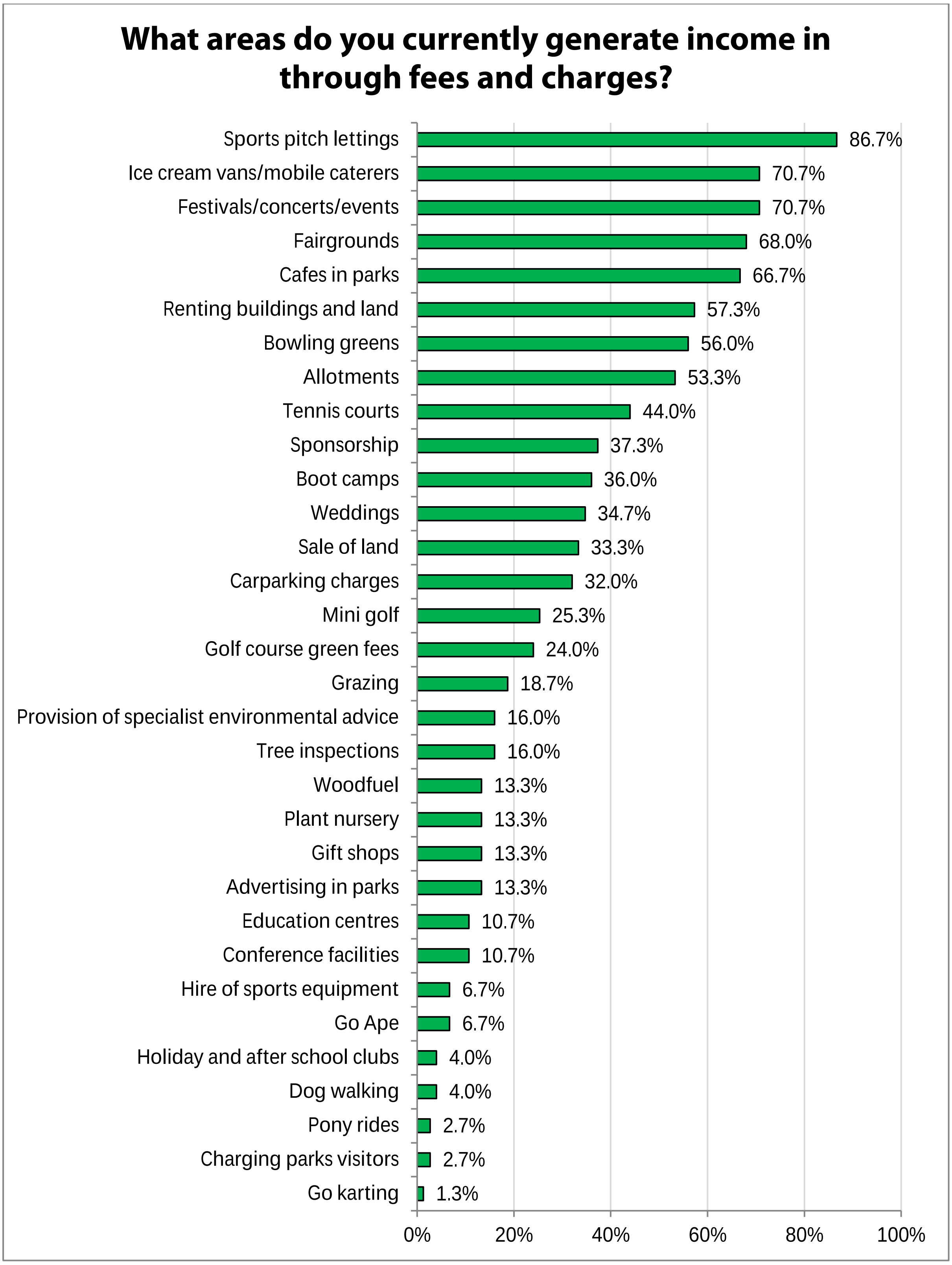


Respondents who answered 'decrease by more than 20%' expected a budget decrease from anywhere up to 50%. What is also noticeable is that expected levels of 10-15% budget increased 2016 returns, those expecting budgets cuts of 20% and above has noticeably risen, which suggest harder cuts are now being placed upon parks than was previously expected.

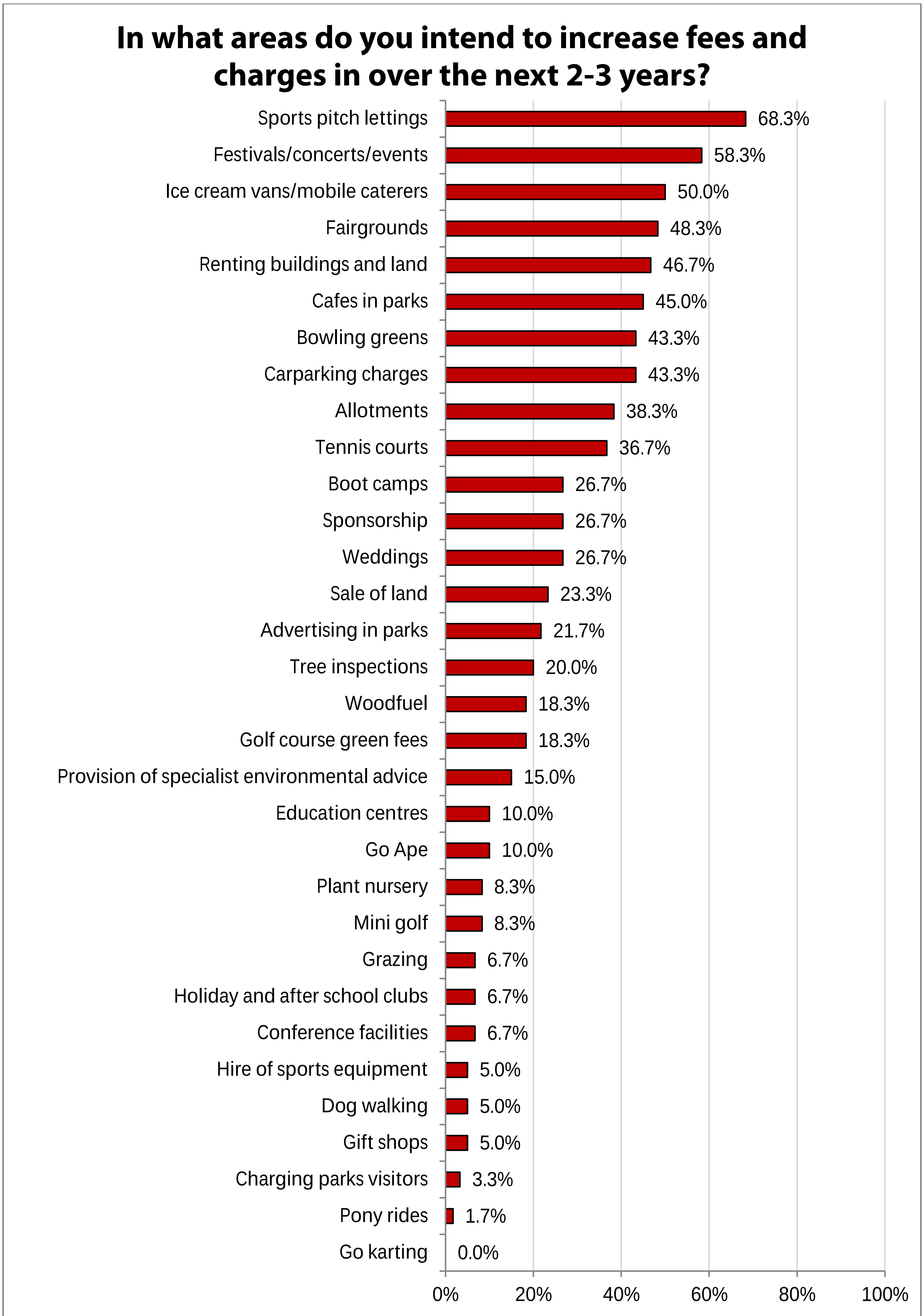
Respondents were currently looking at a range of efficiencies to address these reductions, and these include:

- 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

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



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



Respondents identified several barriers to generating income , these included:

- 59% cited 'competing priorities (e.g. budget cuts)' similar to 2016, 'a lack of time,' (45.6%, down 5.1%),
- 'experience of staff in bringing in new income' 44%, the same as 2016 -suggesting staff are still requiring better skills at raising income),
- 'political resistance' (48%, an increase of 13% on 2016 - suggesting politicians are perhaps becoming concerned about ensuring free access to parks whilst still acknowledging the need to generate income to offset budget gaps.
- 'public resistance' (38%, up 5% on 2016) and
- 'lack of investment funding' (49% a significant rise of 20% on 2016).

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.

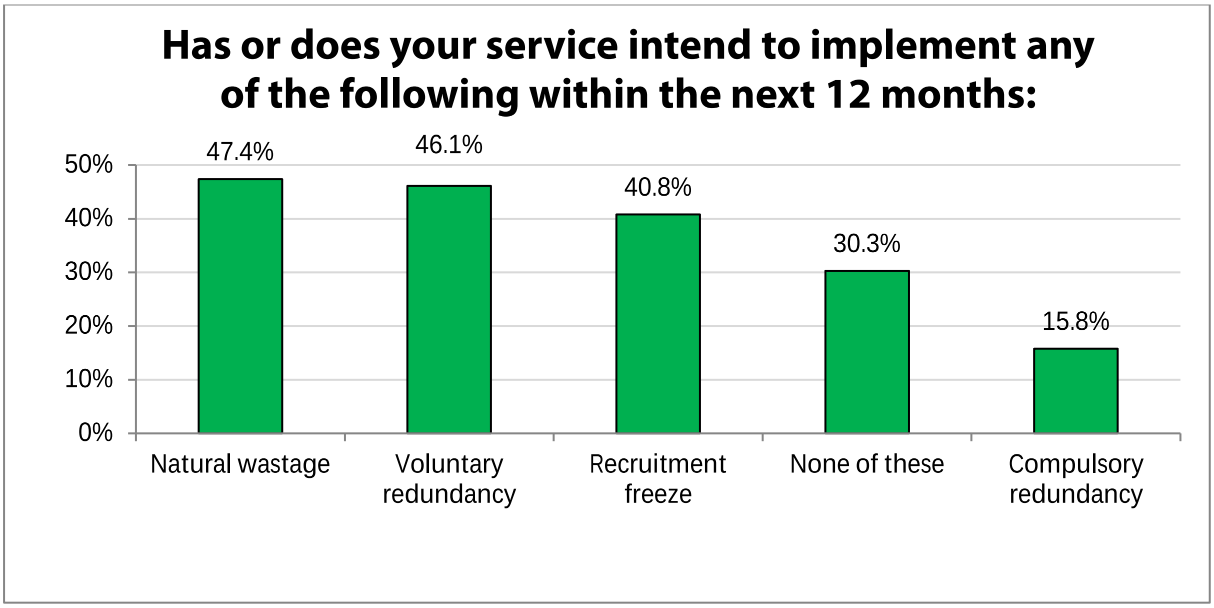
Aside from income from fees and charging, the majority of parks obtain additional funding from

- 'Section 106 money' (89%).
- 'National Lottery Heritage Fund' (60% up from 53.4% in 2016).
- The number of respondents receiving income 'through friends of parks groups' has risen (59% to 51.7%, since 2016).
- Grant funding from other sources has risen since 2016 (51%, from 46.6% in 2016).
- Sponsorship' was received by 48% in 2017 which is a significant rise from 2016 when 36.2% of respondents received sponsorship.
- Figures for 'health funding' (18% down from 25.9% in 2016),
- 'sale of assets rose (e.g. timber)' (29% up from 22% in 2016) and
- private funding rose from 10.3%, to 12% in 2017, showing a slight rise.

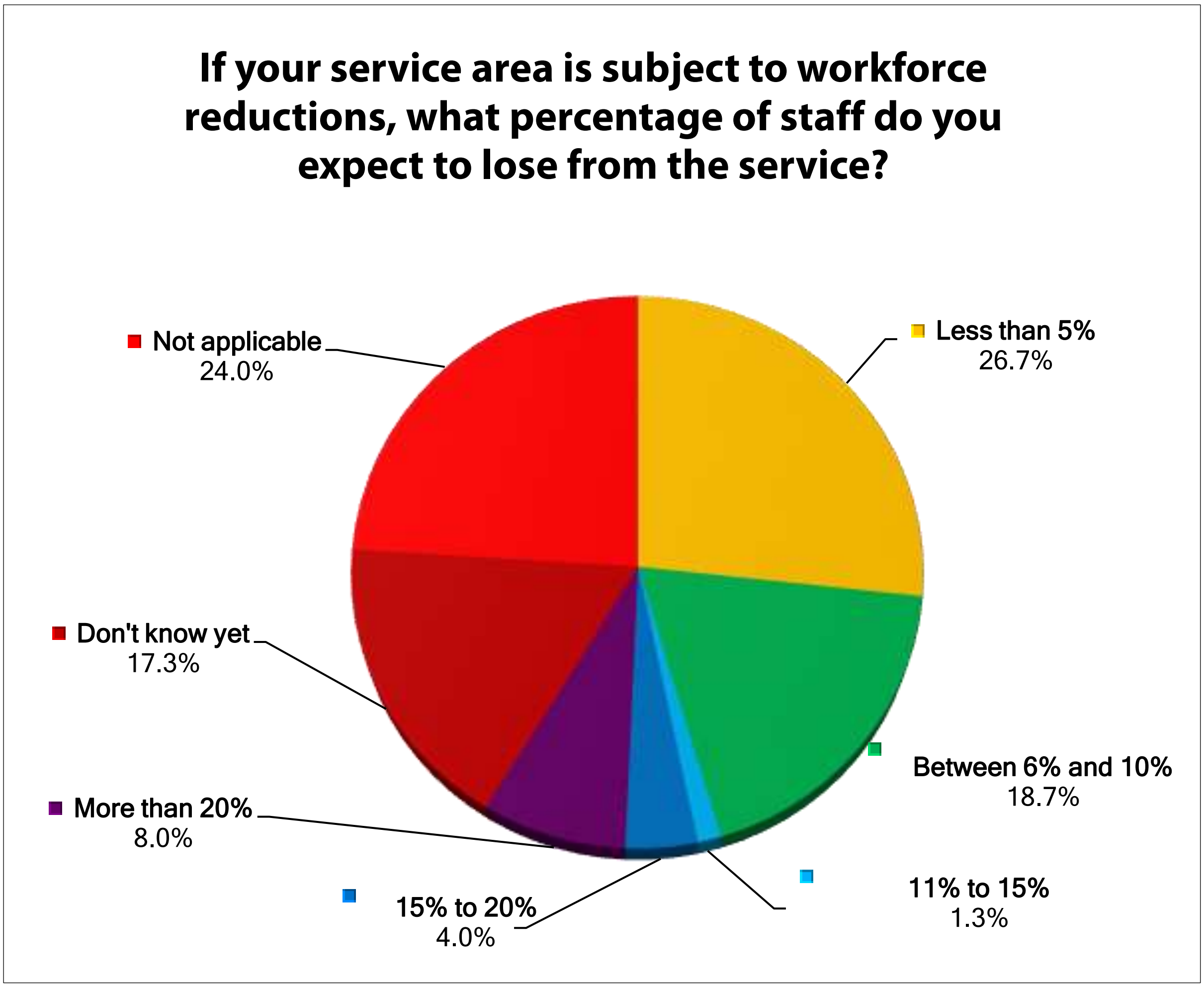
Respondents were asked whether they sold their services outside of the Local Authority. 35% currently sell services to the 'private sector', a slight increase since 2016. 29% currently sell services to 'other local authorities', again a slight rise on 2016. The most noticeable increase has been selling services to 'other public sector bodies' which has seen an increase of 10% (33% 2017 from 23% 2016). 44% of respondents indicated that their local authority does not sell their services to any of the above which is a fall from 47% in 2016.

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:

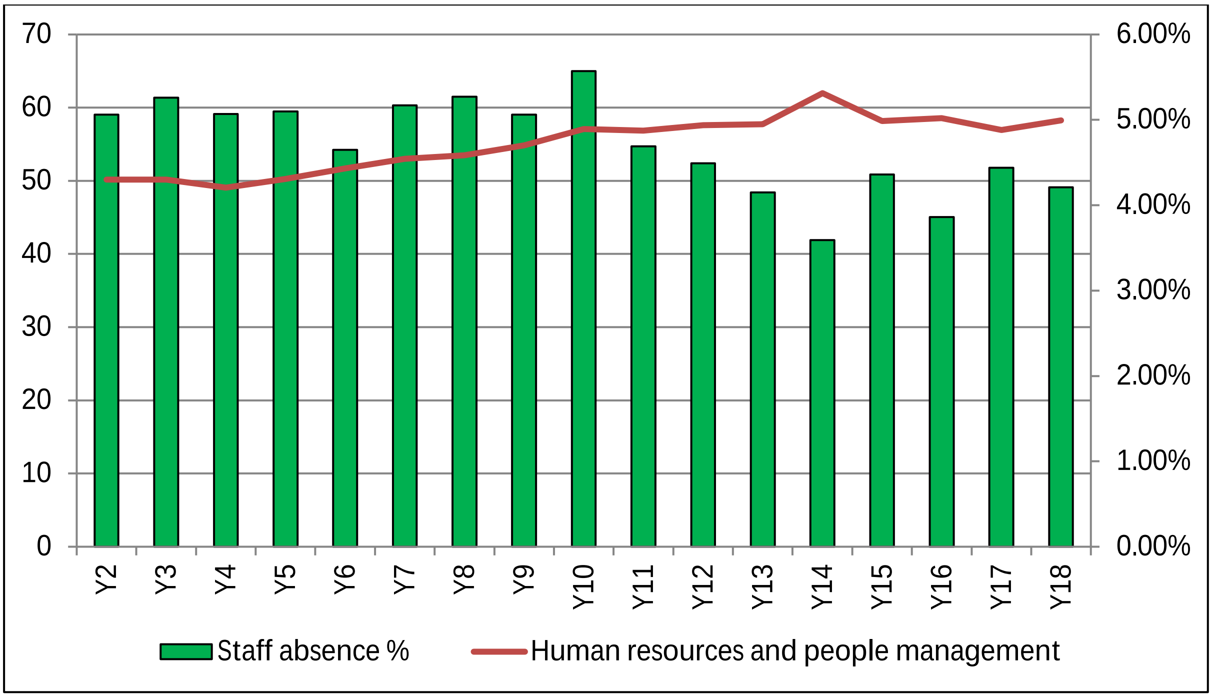


The outlook of respondents has generally improved since 2016's's survey with a greater certainty of the number of staff they expected to lose and a noticeable decline in those expecting to lose more than 10%.

Are staff absence levels at an acceptable level?	
Too high	14.9%
Slightly above average	17.6%
About average	31.1%
Slightly below average	23.0%
Very low	13.5%

There has been an improvement in respondents reporting staff absence levels as about average (31% 2017 from 25.4% in 2016) which suggests an improvement in attendance levels. 31.6% reported absence levels as being either 'too high' or 'slightly above average', which is a fall of 2.2% on 2016, while 38.5% reported absence levels as being 'very low' or 'slightly below average'

APSE's benchmarking service Performance Networks has shown that staff absence is now standing at 4.21% (down 0.20% since 2016) for Year 18, which is well below the recorded high of 5.57% in Year 10. The average performance score in human resources and people management rose to 58.28 (up 1.33 since 2016). The following chart has been extracted from APSE Performance Networks data collected between Years 2 and 18 using PI 13a – Percentage staff absence and PI 16 – Human resources and people management.

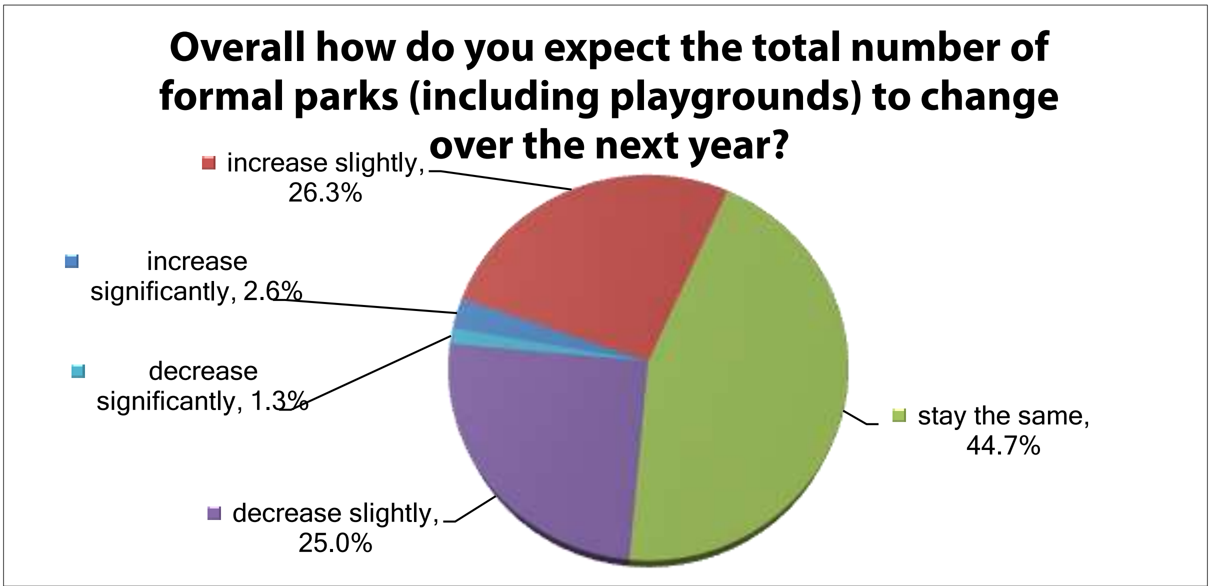


In terms of training, 70.7% thought that the training budget will stay the same over the next 12 months and 20.2% thought that it was going to decrease, which is a heartening response, as in 2016, 32.2% felt training budgets would reduce.

55% of respondents stated that they currently have apprentices which is a rise of 5% on 2016, and 64% are planning to recruit apprentices in 2017-18 which is a significant rise compared to 38.2% in 2016/17 . 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

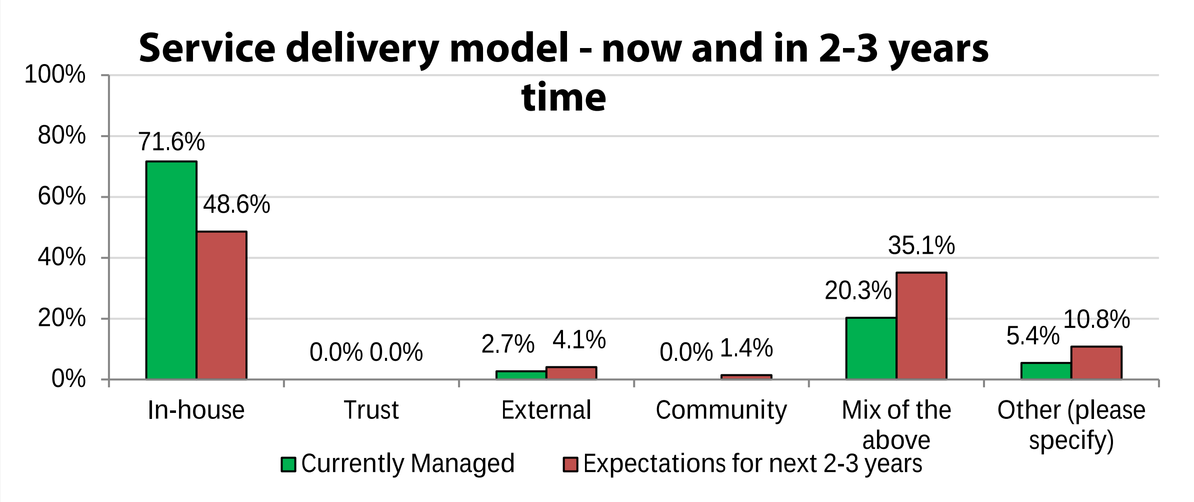
The State of the Market survey has tracked the change in response since 2008 to the question 'Overall how do you expect the total number of parks (including playgrounds) to change over the next year?' 44.7% of respondents expected the total number to stay the same, with 25% expecting a slight or significant decrease, and the remaining 29% expecting a slight or significant increase over the next year which is a 10% rise over 2016 figures.



When asked about the number of visitors to formal parks during the past year, 62.5% said they had seen increases which is a significant rise on 2016 when 41% believed numbers had increased. 35% felt visitor numbers had remained the same which is a fall on 2016 when 55.2% felt visitor numbers had remained the same and 2.5% believed they had decreased a fall when compared to 2016 figure of 3.4%. Only 37% of respondents monitor visitor numbers through a mixture of footfall/visitor/gate monitors, car monitors/car park payment monitors, audits and visitor surveys.

d) Service delivery

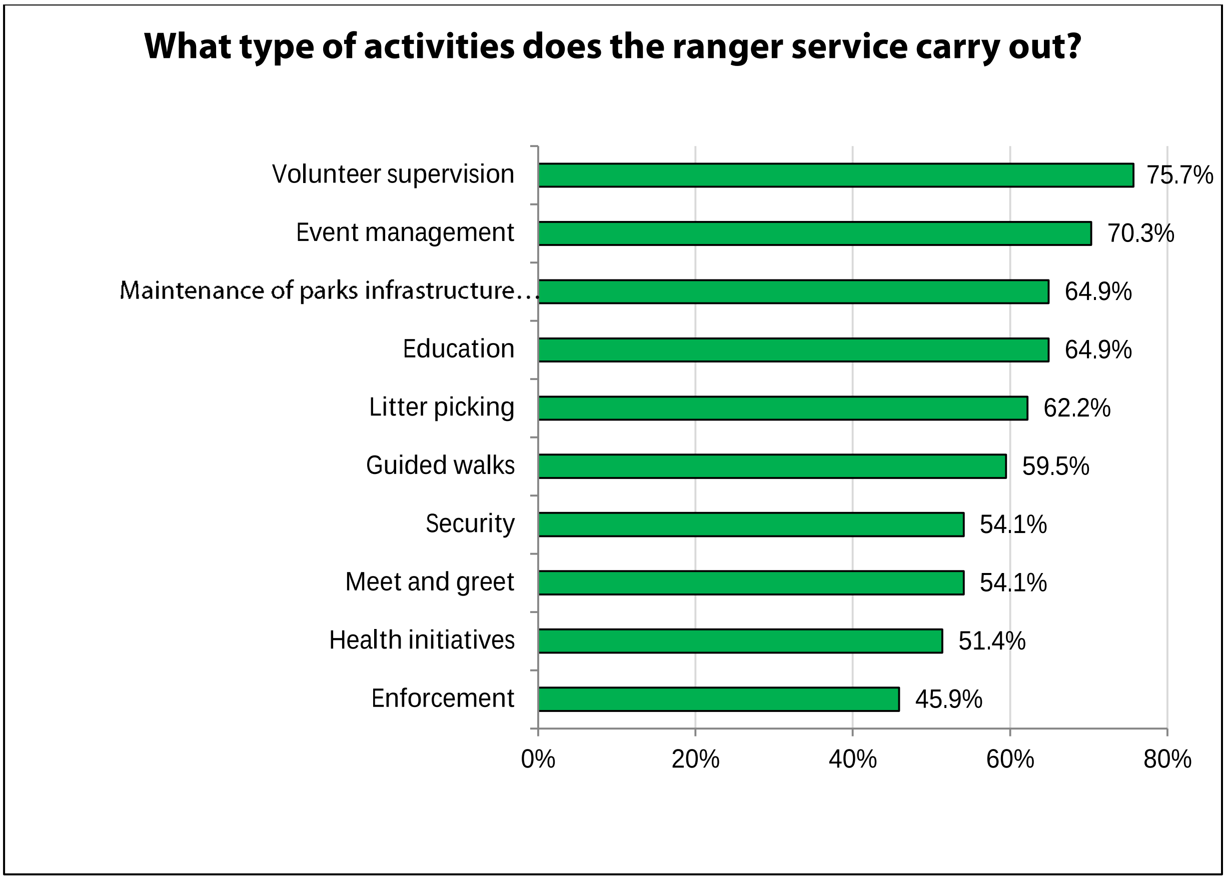
Whilst 71.6% of respondents currently have in-house services (down 8.1%), only 48% expect to be managed in-house in the next 2-3 years (down16%). When asked how respondents expected the service to be managed in the near future, 35.0% expected a mix of in-house, trust, external and community management (up 10%).



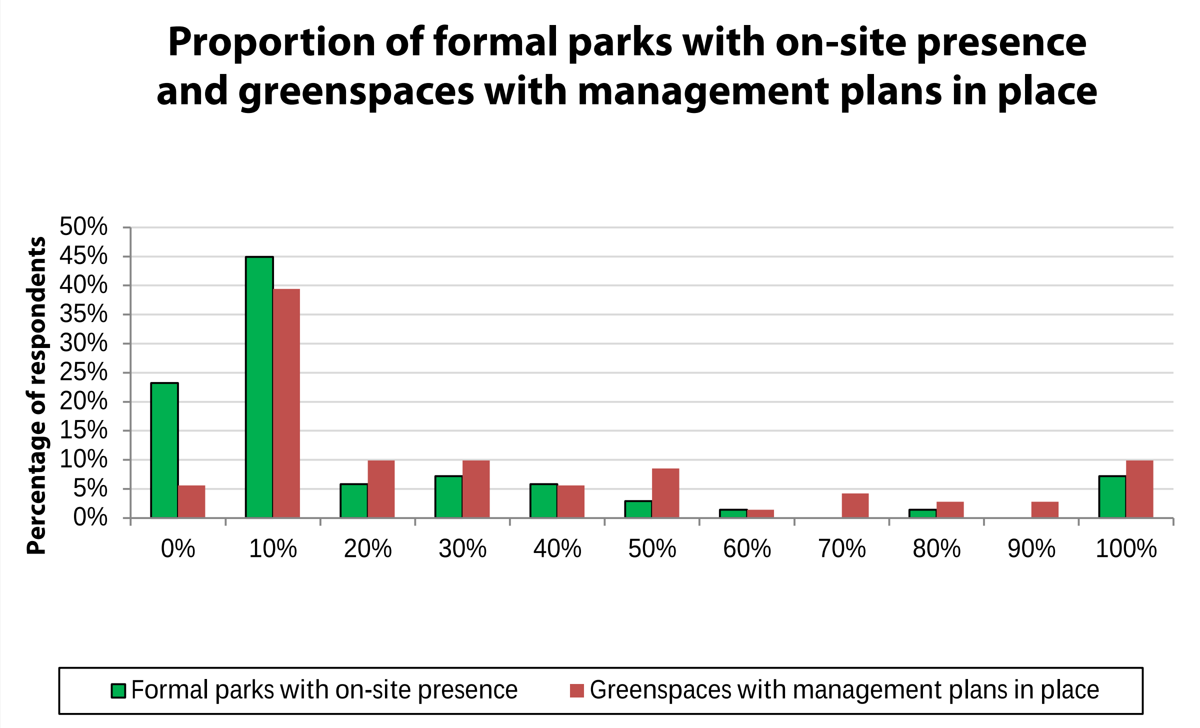
The bullet points below provide a useful summary of what is being delivered within the parks service and how it is being delivered according to those who responded to the survey:

- 65% have dog control orders in parks and green spaces and 69% have on the spot fines for litter/flytipping; 14% have none of the above
- 75% use seasonal labour (up 5.7%). Of those who have seasonal labour, on average 20-25% of their workforce are employed on these terms (up 1.6%)
- 50% have annualised hours Of those who have annualised hours, on average over 70% of their workforce are employed on these terms

49% reported having parks rangers although 85% 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:

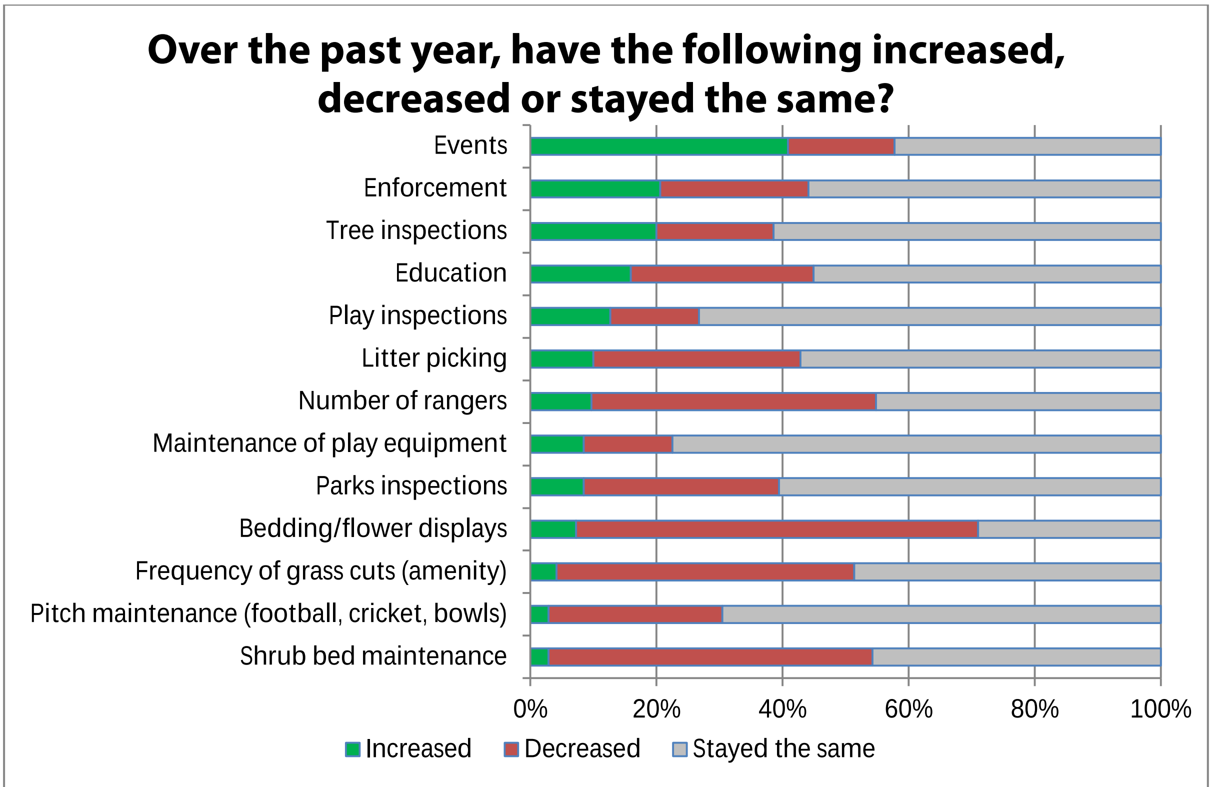


When asked about the proportion of formal parks which have an on-site presence and the proportion of greenspaces that have management plans in place, respondents answered:



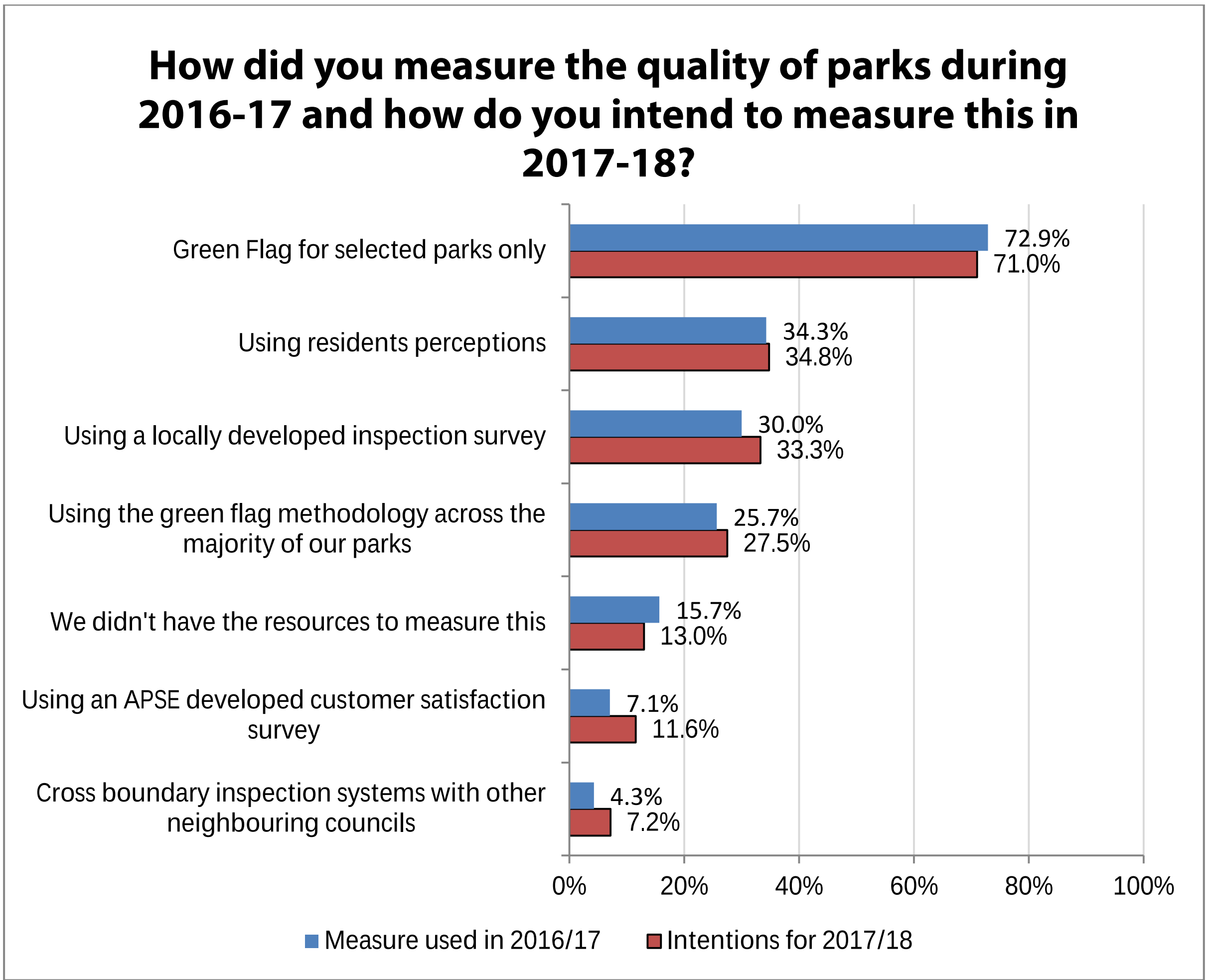
e) Service standards and quality of service

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 and. 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 13 cuts, with 32% stating 10 cuts or less, 37.5% stating 11-15 cuts, 25% stating 16-20 cuts and 18% stating 21 cuts or more. 10.0% used Cylinder machines for estate and highways grass cuts, 25.0% used Rotary, 3% used Flail and 62.0% used a mixture of the above.

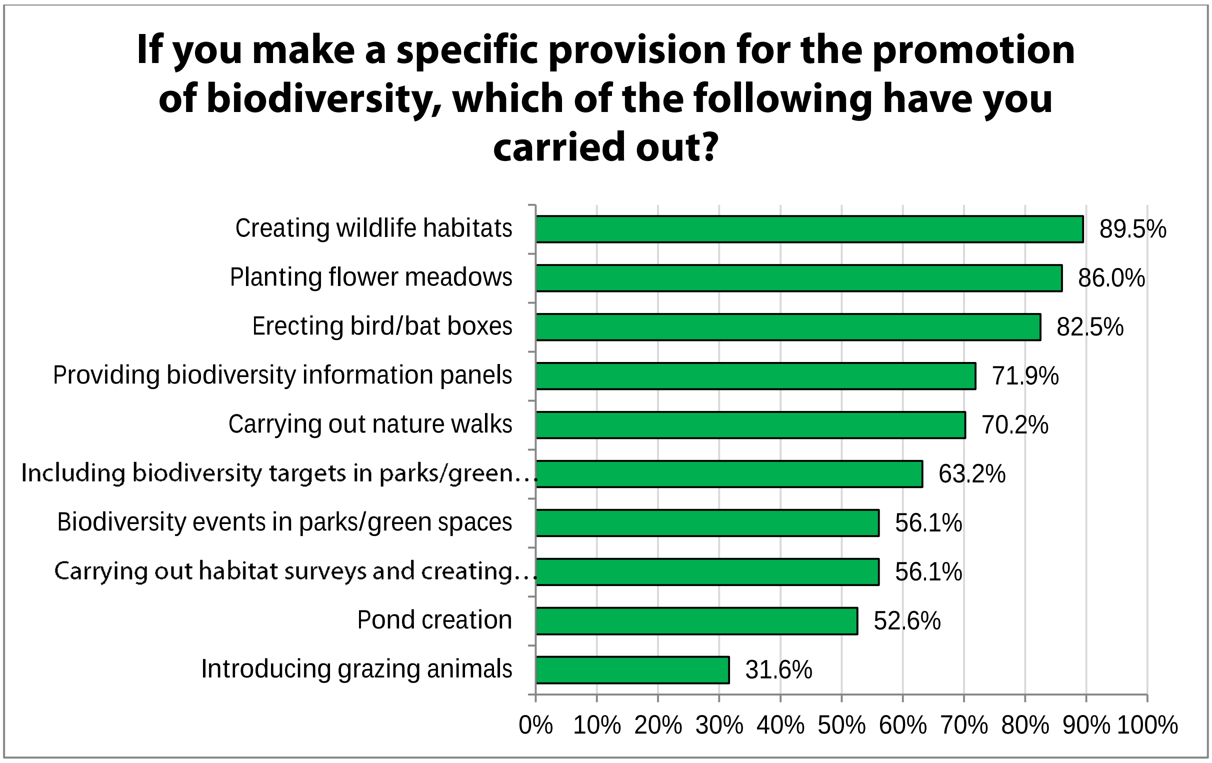
The survey asked how quality of parks was measured during 2014-15 and how respondents intended to measure this in 2017-18 and the results were as follows:



Respondents' intentions for 2015-16 saw a slight fall in 'Green Flag for selected parks only' (although there was a slight increase in 'using the green flag methodology across the majority of our parks'. Slight rises occurred in 'using a locally developed inspection survey' More respondents intend to use' residents perceptions' than in 2016/17 and 'cross boundary inspection systems with other neighbouring councils' also saw increases. 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 against similarly sized authorities.

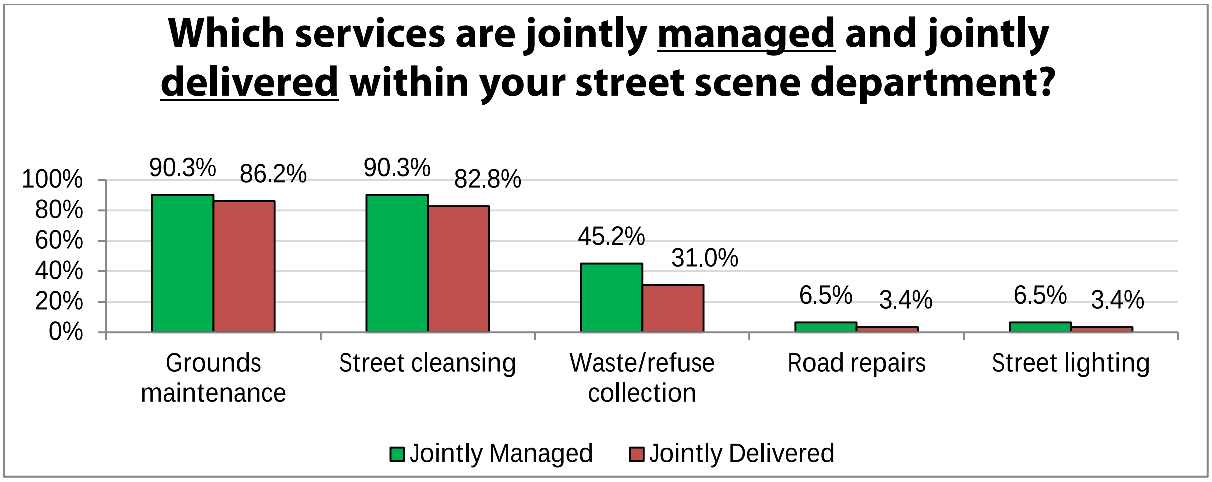
f) Biodiversity

80% of respondents make a specific provision for promoting biodiversity in parks and green spaces a rise of 4% on 2016. Of those that make specific provisions, the respondents have carried out the following:



g) Integrated street scene services

42% of respondents are already part of an integrated street scene service, (roughly the same as 2016), which involves the following services being jointly managed or delivered:

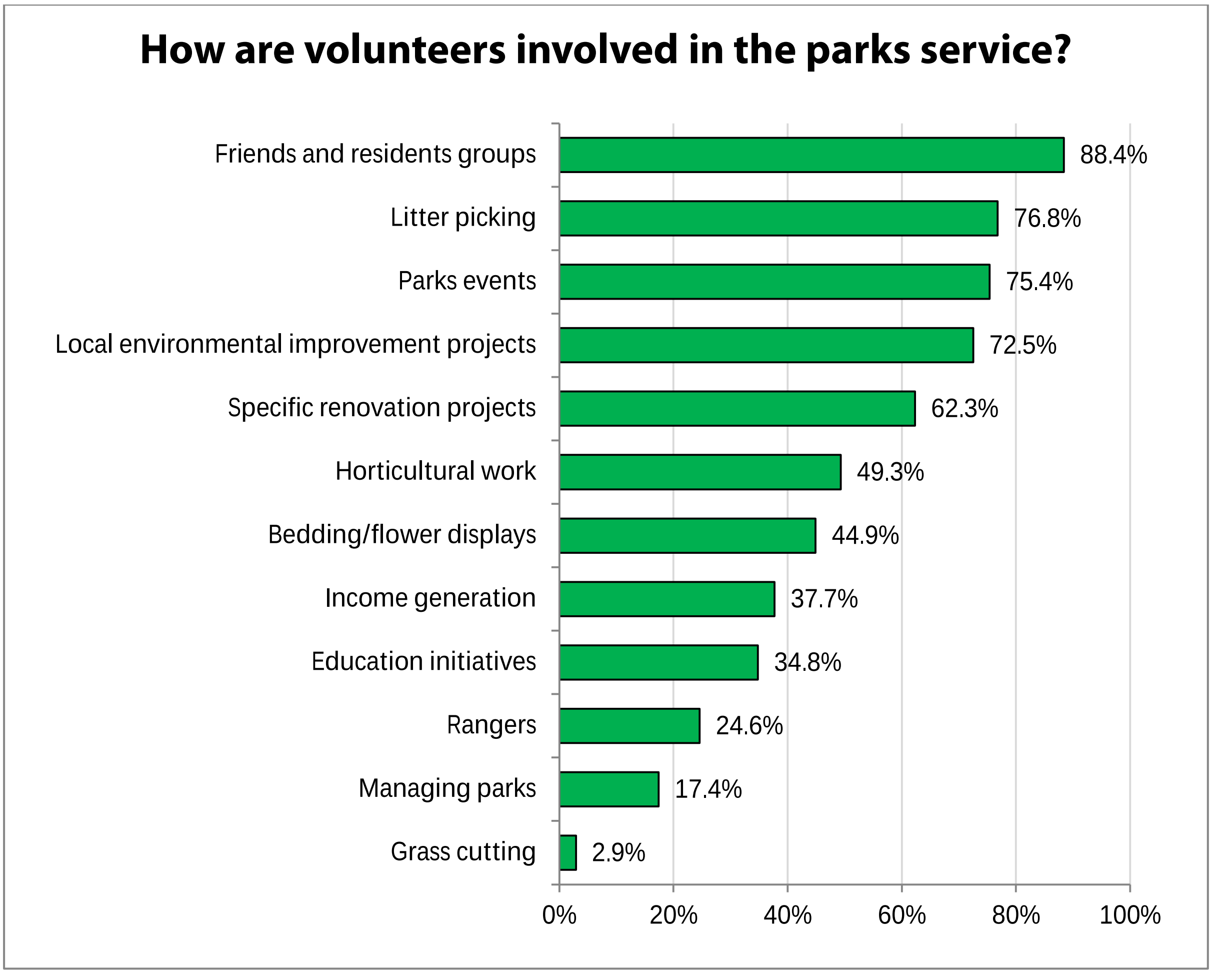


The largest areas of decrease in the joint delivery of services have continued to be in road repairs (28.6 % in 2013); the management of street lighting has also fallen (19.6 % in 2013).

Out of the respondents who answered that they are not already part of an integrated street scene service, 22% expect to become part of an integrated service in the near future (a drop of 3% on 2016).

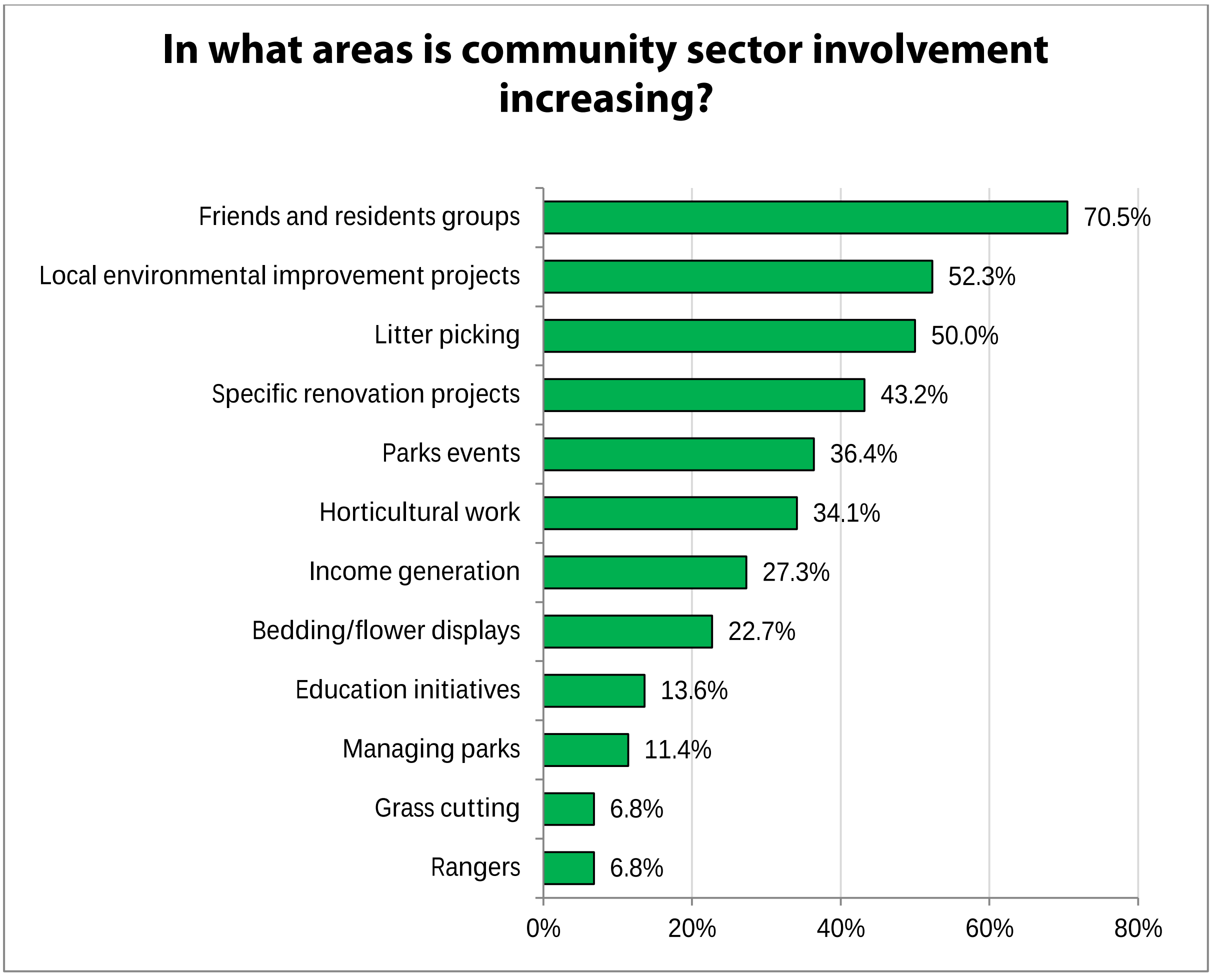
h) Community and volunteer involvement

93% of respondents had friends of parks groups operating in their localities a fall of 5% on 2016 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 (88%) and specific projects like parks events (62%). There has been a rise in the number of volunteers involved in litter picking (77%, up 9%), education initiatives (35%, up 13%) and managing parks (17%, up 6%).

58% 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', 35% said yes and 27% said their council is looking at this (a 2% fall on 2016). Respondents stated that the following elements had been transferred to community ownership:

What elements have been transferred to community management/ownership?	
Buildings	78.3%
Playing fields	56.5%
Parks	34.8%
Play areas	21.7%

The most significant change from 2016 is that parks are now being 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:

Where do you see growth for the service over the next 12 months?	
Community involvement/engagement	67.2%
Partnership working with other public bodies	62.7%
Sharing services with other local authorities	50.7%
Conservation and management of climate change	22.4%
Events in parks	43.3%
Offering a maintenance service to external organisations/private work	37.3%
Offering a maintenance service to other local authorities	28.4%
Additional open space from housing developments	46.3%
Children's play	22.4%
Capital projects (e.g. section 106)	34.3%
Allotments/community gardens	23.9%
Nursery production	6.0%
Training	17.9%

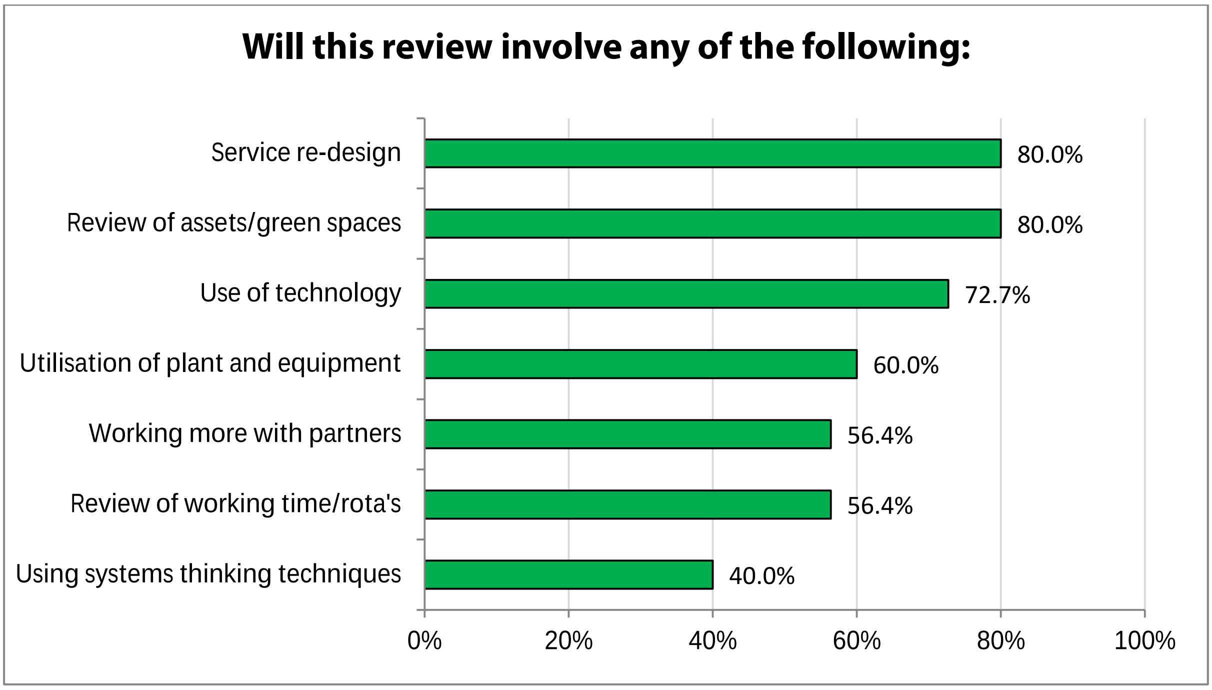
The survey also asked where they saw future decreases in work for the service and the breakdown is as follows:

Where do you see future decreases in work for the service?	
Reduced maintenance or frequency of maintenance of grounds	81.5%
Bedding, floral displays, regional shows, ornamental grass cutting, bowling greens, high amenity areas	81.5%
Reduction in service or standards	78.5%
Transfer of assets	40.0%
Fewer parks and facilities	35.4%
Achievement in awards	35.4%

Landscaping and country parks	30.8%
Sports provision	30.8%
New development projects/capital investment schemes e.g. play area refurbishment	30.8%
Ranger service	29.2%
Parks development activity	27.7%
Litter picking	26.2%
Cemeteries and closed churchyards	20.0%
Schools grounds maintenance	16.9%
Other council department service level agreements e.g. education, housing and leisure	16.9%
Housing grass cutting contracts	16.9%
Parks-specific community engagement	15.4%
Inspection and maintenance of children's play areas	12.3%
Maintenance work for town/parish councils	10.8%

j) Service reviews

31% of respondents had recently completed a service review, 34.0% were currently underway and 21.0% plan to do so in the next 1-2 years. 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 risk that service quality will diminish as a result of the ongoing pressures on budgets, changes to maintenance frequencies and a need for investment.

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. Equally there are signs that the level of budget cuts previously anticipated may be less severe than initially thought with average cuts of between 10-15% becoming the most anticipated.

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 recent Parks Inquiry reports and is now firmly on the Government's agenda..

It is also 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 responsibility of our greenspaces needs to be considered carefully if free access is to be maintained. The recent Parks Inquiry although recognising the need for mixed models in parks management 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 received to 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 regimes may need to be introduced which allow reduced costs whilst still maintaining quality e.g. naturalised planting.

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-needy 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 community management. They 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, flood alleviation, climate change amelioration, social cohesion etc.

APSE feels there needs to be a balanced and proportionate response to the many concerns being raised about future of the UK's public parks due to the positive and innovative work local authorities are continuing to successfully deliver in their desire to maintain cleaner, greener and safer parks and greenspaces in spite of the austerity measures local authority services are facing.

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
- Commercialisation network
- Housing, construction and building maintenance
- Parks, horticultural and ground maintenance
- Renewables and climate change
- Roads, highways and street lighting
- Service transformation and performance management
- Sports and leisure management
- Vehicle maintenance and transport
- Waste management, refuse collection and street cleansing