apse membership resources

# State of the Market Survey 2020

## Local Authority Parks and Green Spaces Services

**Briefing 20-98**
**March 2020**


The 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 Parks and Green Spaces Services State of the Market 2020

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:

- 2019 results briefing
- 2018 results briefing
- 2017 results briefing
- 2016 results briefing
- 2015 results briefing
- 2013 results briefing
- 2012 results briefing

135 responses were received from local authorities throughout the UK, as opposed to 46 in 2019. 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 | 39% | 38% | 19% | 0% | 5% |
| Reductions in funding has resulted in a withdrawal of maintenance from some land and an increase in unmaintained land | 45% | 37% | 15% | 0% | 3% |
| Lack of investment in parks and green spaces will have health and social impacts | 71% | 26% | 2% | 0% | 1% |
| There is a clear link between parks/play provision and levels of crime/anti-social behaviour | 25% | 51% | 8% | 0% | 16% |
| There's a limit to the extent to which volunteers can be involved in delivering parks and green space services | 61% | 34% | 5% | 0% | 0% |
| The public should get free access to all parks | 65% | 27% | 5% | 1% | 3% |

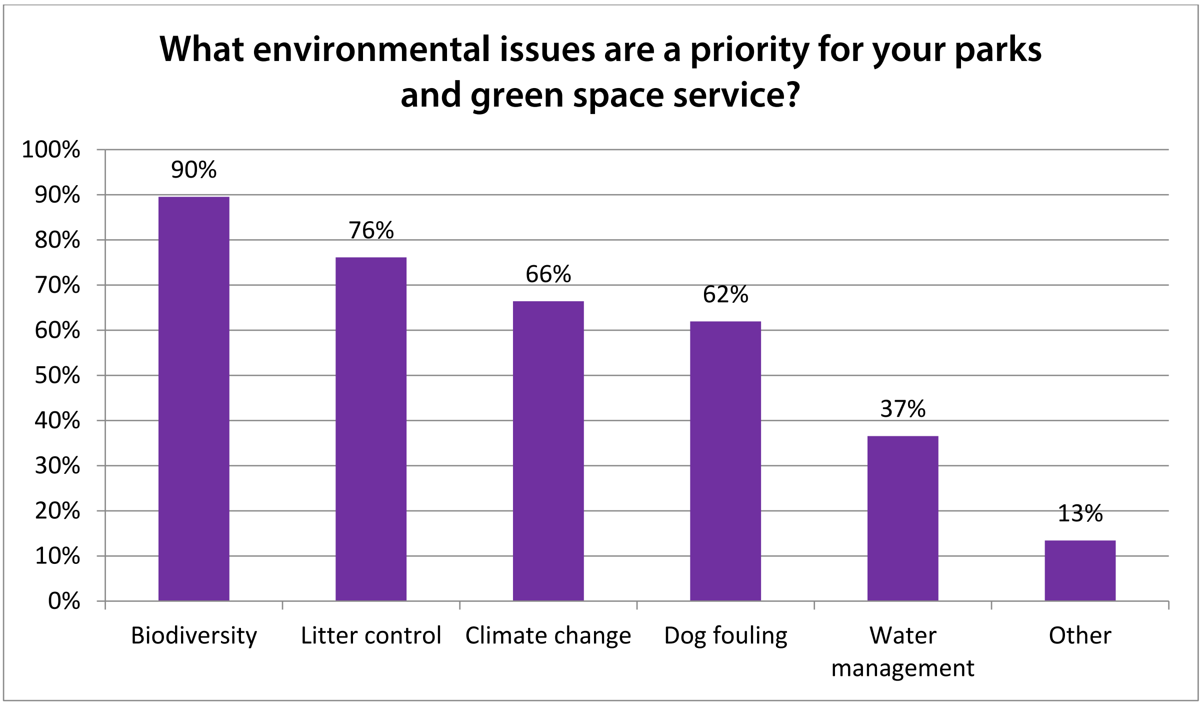
There has been a **fall** from 82 % to 77% regarding respondents who either 'agree', or 'agree strongly' that 'the squeeze on public sector resources is affecting parks and green spaces disproportionately to other service areas, this reflects the view from some attendees at APSE events that the level of cuts on budgets has begun to ease.. Equally, there has been an a slight 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. Coupled together these two results show that there seems to be a lessening in concerns about both budgets reductions and the negative impact these have previously been having on the quality of parks maintenance.

95% 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% decrease on last year's results. This slight fall could be a result of parks managers feeling that they may now have improved budgets, and as such, can provide better health-related experiences in parks than previously.

76% 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 2% decrease on last year's figure.

95% 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' (100% in 2019). Therefore there does appear to be a slight change in views on the increasing values of volunteers, which although not changing the opinion regards the importance of the continued need for a strong horticultural skills base being provided through local authority employees, volunteers are now adding increasing value to the parks sector..

92% either 'agree' or 'agree strongly' that 'the public should get free access to all parks which re-inforces the view that Parks should remain free for the public to enter.

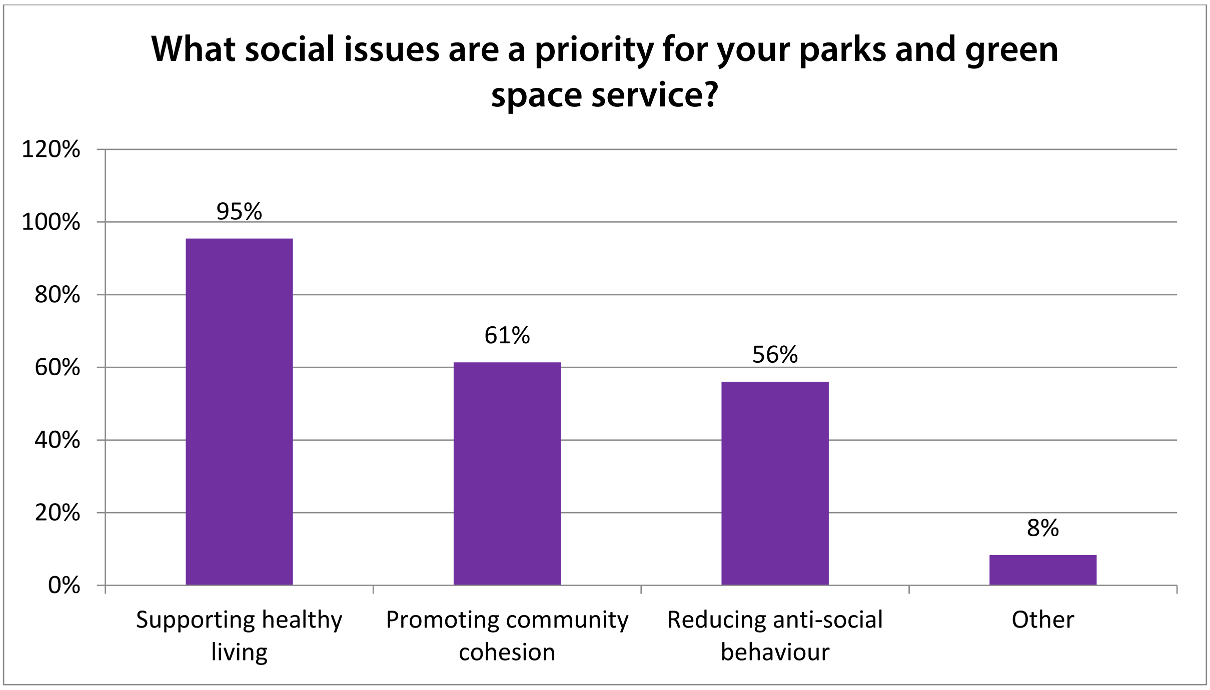


There has been two markedly significant changes in this year's results with respect to the importance of climate change and biodiversity.

The main environmental priority for parks and green space services is now biodiversity at 90% as opposed to 74% in 2019. However the largest increase in levels of importance is in relation to climate change which now stands at 66% as opposed to 30% in 2019.

'Litter control' has fallen in importance from 89% in 2019 to 76% in 2020. Similarly the importance of dog fouling' has fallen from 83% in 2019 to 62% in 2020.

The shift in the importance of climate change and improving biodiversity' and also water management which itself has seen a rise in importance over 2019 by 4%, shows the importance of parks and greenspaces have in ameliorating the effects of climate change. This is perhaps no surprise considering the increasing amount of climate change declarations made by local authorities over the last 12 months. Parks and greenspaces are now being seen as major resources in promoting biodiversity and combatting the more extreme effects of climate change.

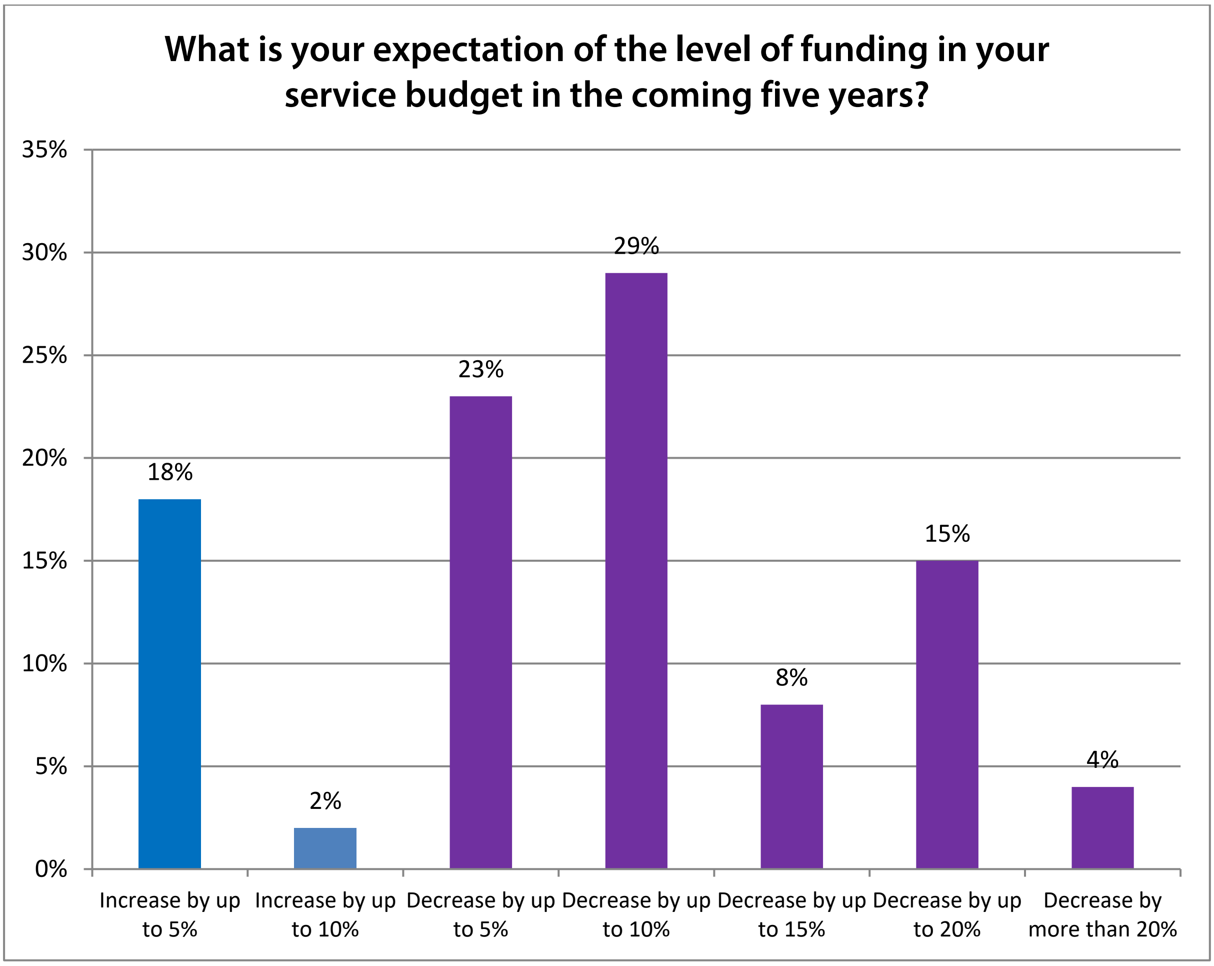



For the 2015 survey, we added a question on the social issues that are a priority for your parks and green space service. The most frequent response was 'supporting healthy living' which this year again recorded an increase, 95% as opposed to 91% in 2019. This rise shows the recognition of the importance of parks and greenspaces to delivering significant benefits to the public's health and well-being. This high response is probably linked to reductions in the importance of promoting community cohesion and reducing anti-social behaviour, although these are still seen as the other key social priorities.. 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 risen from last year, increasing from 71% in 2019 to 76% in 2020. Of those who expected a change in the budget, 75% expect a decrease in revenue, which is a slight increase on 2019 when 70% expected a decrease, however, 55% expect a decrease in capital which is a reduction on 2019, when 57% 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%. The number who expect cuts between 15 -20% has remained fairly static at around 22%. Those expecting cuts of up to 10% has increased from 21% in 2019 to 29% in 2020. Similarly, those expecting cuts of up to 5%, has fallen significantly from 32% in 2019 to 23% in 2020. 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.
18 % said they expect budget increases of up to 5% as opposed to 14% in 2019, and there have even been 2% of respondents who have stated they expect to see increases in budgets of up to 10%.

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 are 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.)

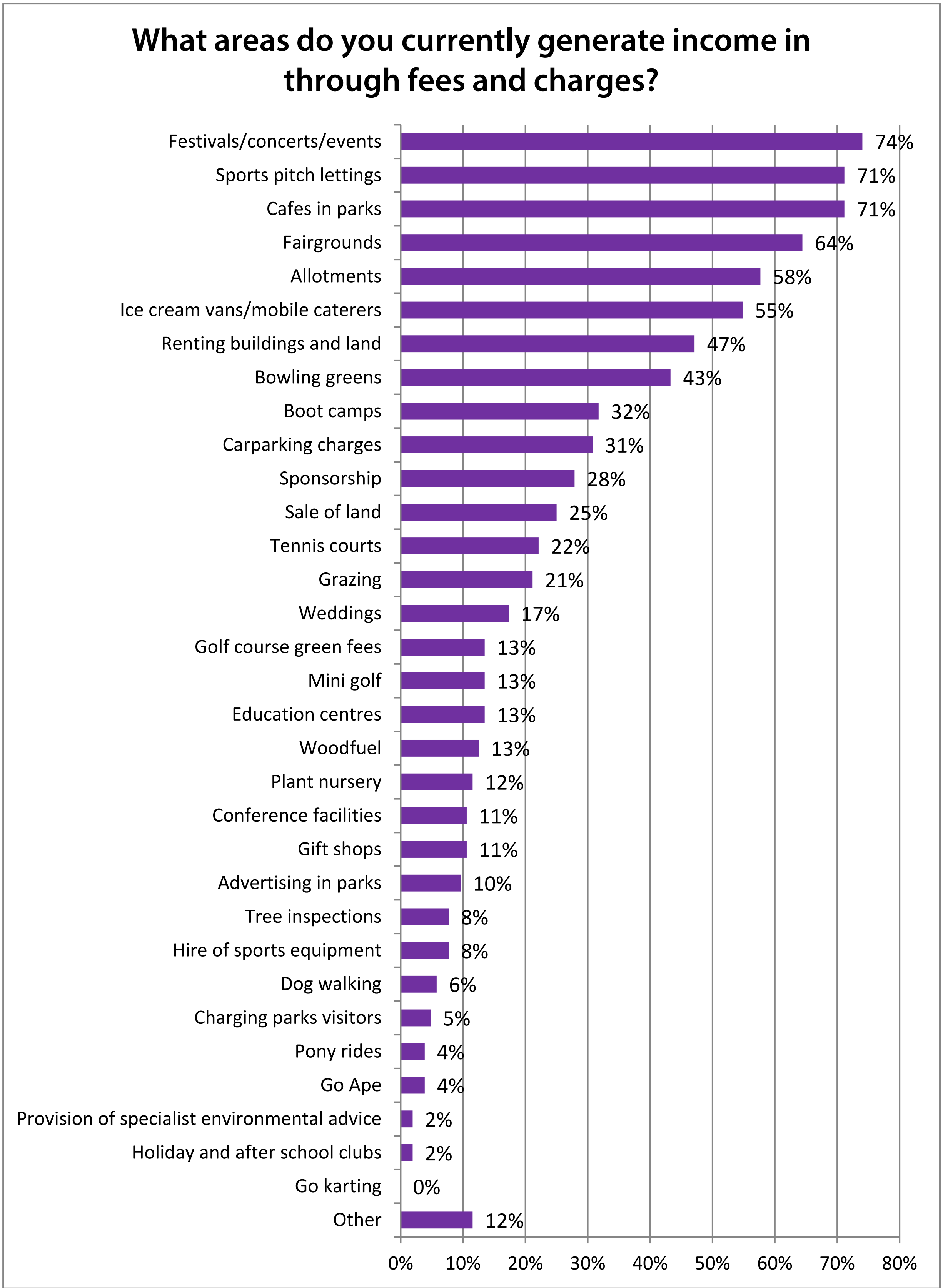
- Promotion of sponsorship and donation opportunities

- Introducing new forms of land management such as grazing which results in an income.

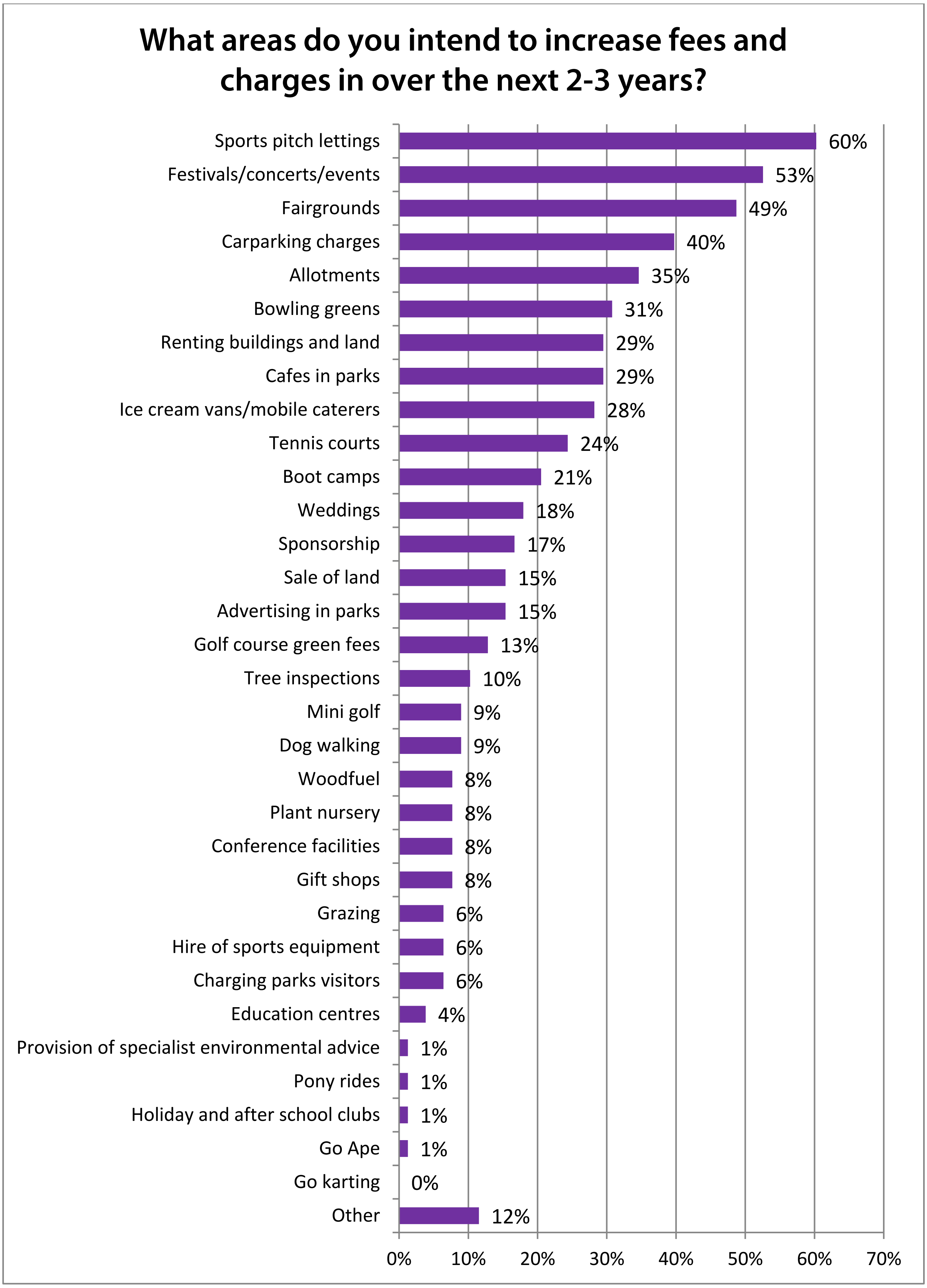
- Bringing services back in-house to reduce contractor costs and increased flexibility opportunities.

- more effective location of staff to reduce travel costs

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




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:



**Respondents identified several barriers to generating income, these included:**

- 55% cited 'competing priorities (e.g. budget cuts)' a slight fall on 2019 when the figure was 60%, also 'a lack of time,' at 59% is slightly lower than 2019 when the score was 60%.
- 'experience of staff in bringing in new income' 45%, which is a significant decrease on 2019 when the figure was 64 %, (suggesting staff are now beginning to improve their skills at raising income).
- 'political resistance' 38%, a rise on 2019 when this stood at 32%.
- 'public resistance' 42% a significant increase on 2019 when the figure recorded was 36%, which may indicate the public are not willing to pay for services within parks. And finally,
- 'lack of investment funding' at 47% a large decrease on 2019 when the figure stood at 57%. Potentially this rise could be linked with the fact it is now accepted that in order to raise income parks need to be able to have attractions which the public are willing to pay for and investment is being made.

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 one or more of the following sources

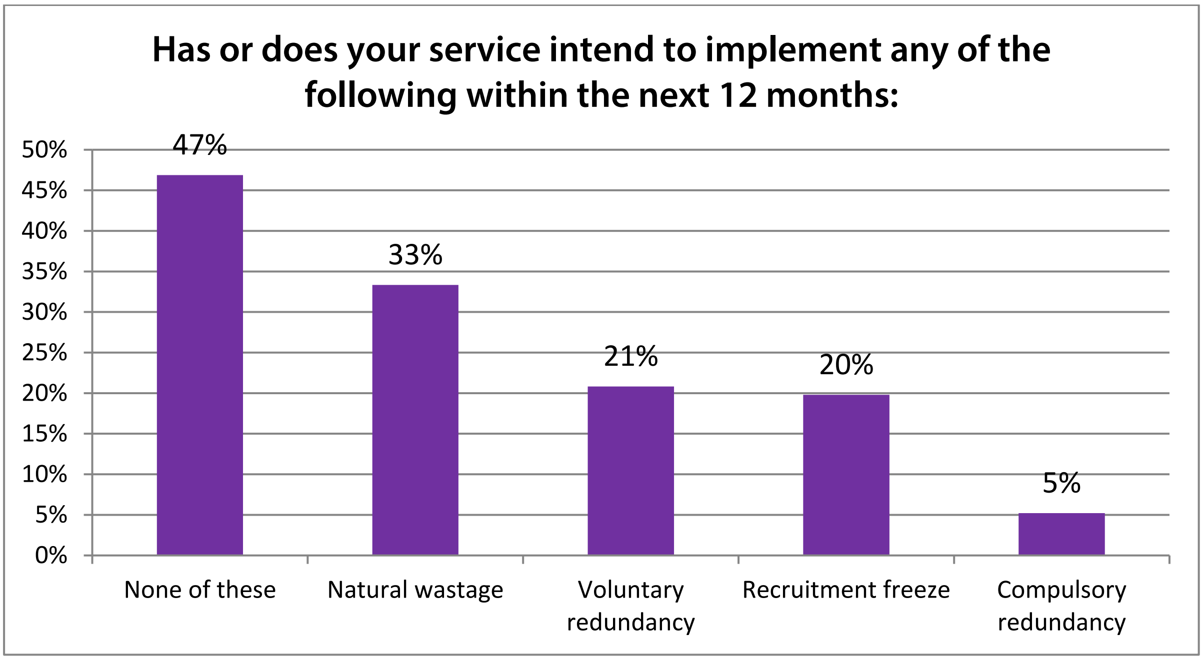
- 60% of respondents have accessed Section 106 money' shows a decrease on 2019 when 93% reported monies from S106 funding.
- 'National Lottery Heritage Fund' 53% which is a rise on 2019 when 41% accessed funding from this source. Possibly due to a change in the HLF funding allocation criteria.
- The number of respondents receiving income 'through friends of parks groups' has fallen to 78% as opposed to 90% in 2019, showing even with such a fall, just how vital such groups are now becoming to their local parks and greenspaces.
- Grant funding from other sources has risen since 2019 from 52% to 69% in 2020, Sponsorship' was received by 100% of respondents in some form or other.
- Figures for 'health funding' has significantly increased with all respondents accessing some form of health funding
- In come from ecosystem services is growing in importance with almost all respondents stating they received some income from this source.

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.

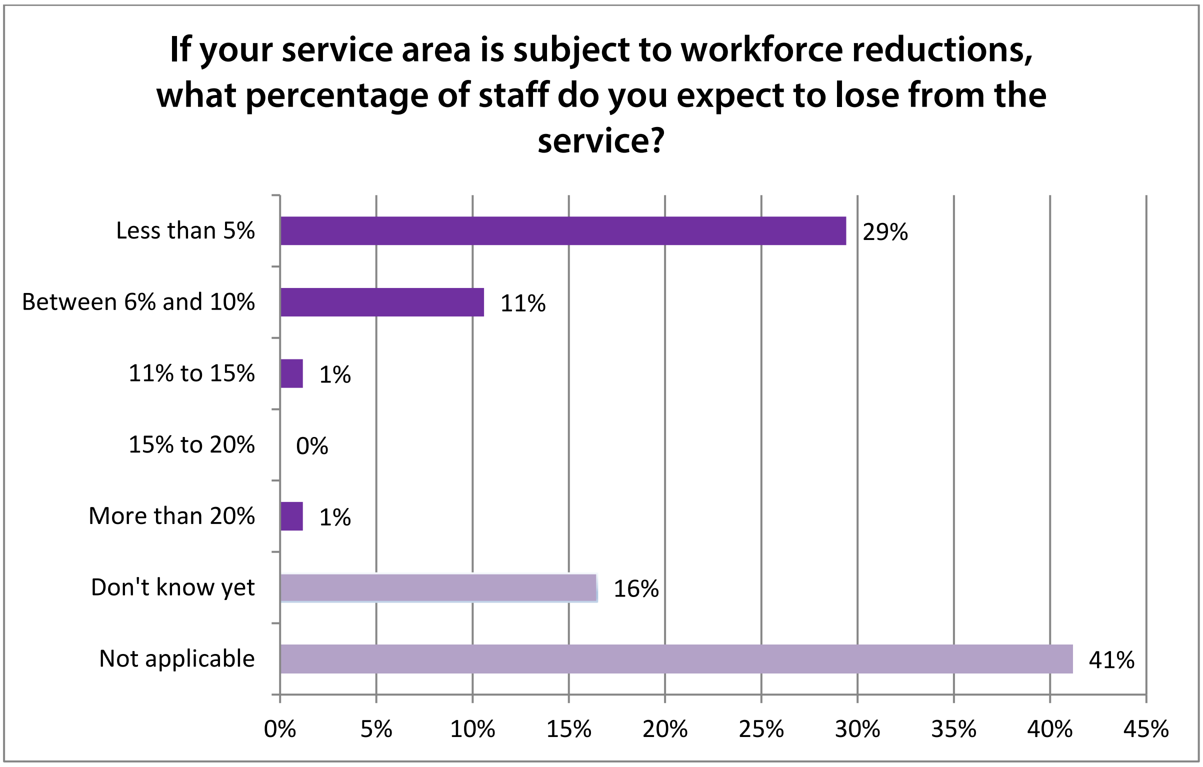
**b) Staffing**

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:

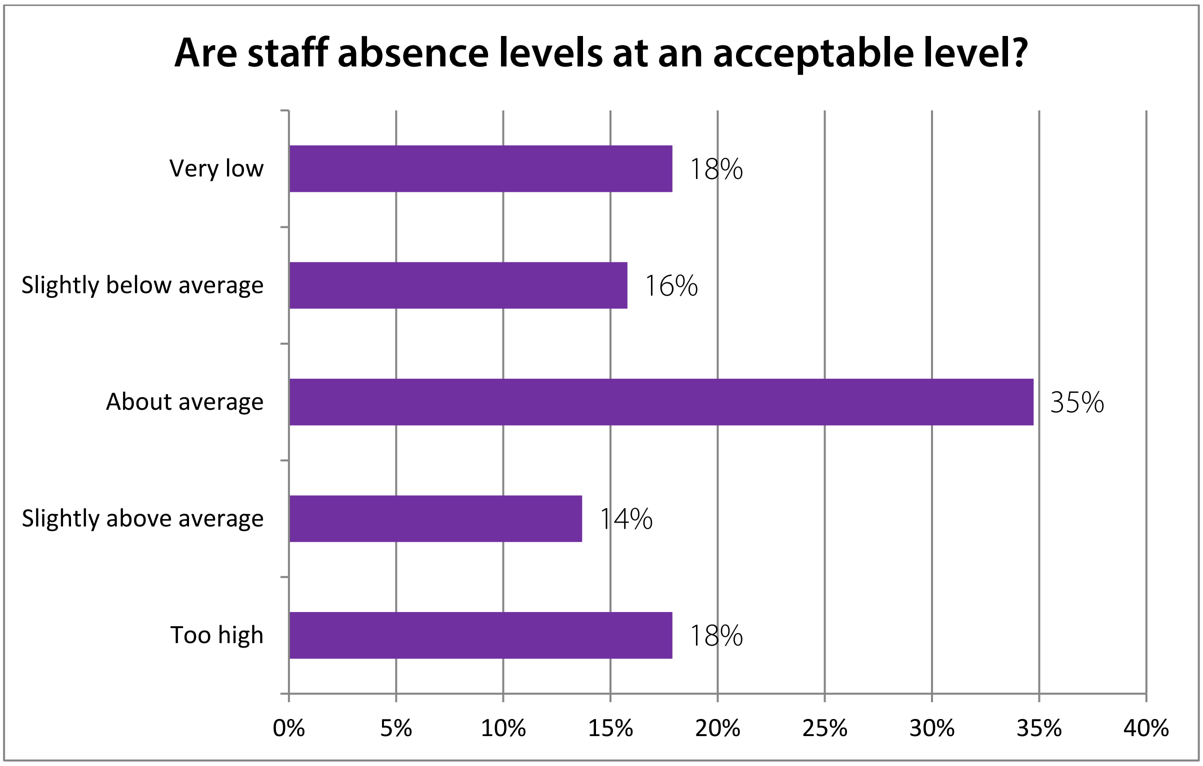



What was clear from the returns was that there was an 'across the board' reduction in any of these staff reduction options being used, suggesting fewer services were reducing staff numbers.

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 2019 results survey could be seen as more positive particularly that almost half of respondents said workforce reductions were not applicable to them.,. This could be seen as a sign that staffing levels are stabilising with fewer councils looking to reduce staffing levels beyond those expected.



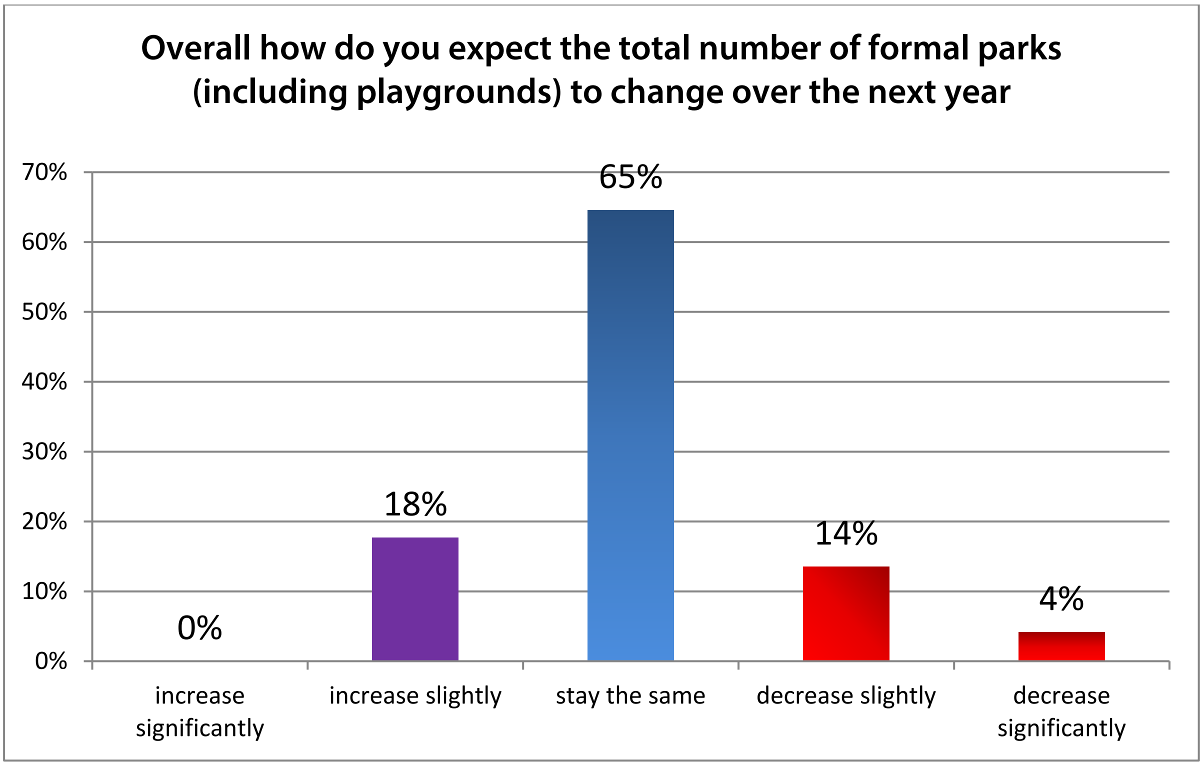

There has been little change in staff absence levels when compared to 2019, although it is noticeable that 34 % of respondents said absence levels were very low or below average in 2020 as opposed to 26% in 2019.

In terms of training, 80% thought that the training budget will stay the same over the next 12 months and 10 % thought that it was going to decrease. 10% 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.

59% of respondents stated that they currently have apprentices which is a significant decrease on 2019 when 71% reported that they had apprentices, and 53% are planning to recruit apprentices in 2020/21 which is a 10% fall on 2019. 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?' 65% of respondents expected the total number to stay the same, as opposed to 58% in 2019, with 20% expecting a slight or significant decrease as opposed to 16% in 2019 and the remaining 18% expecting a slight or significant increase over the next year which is a

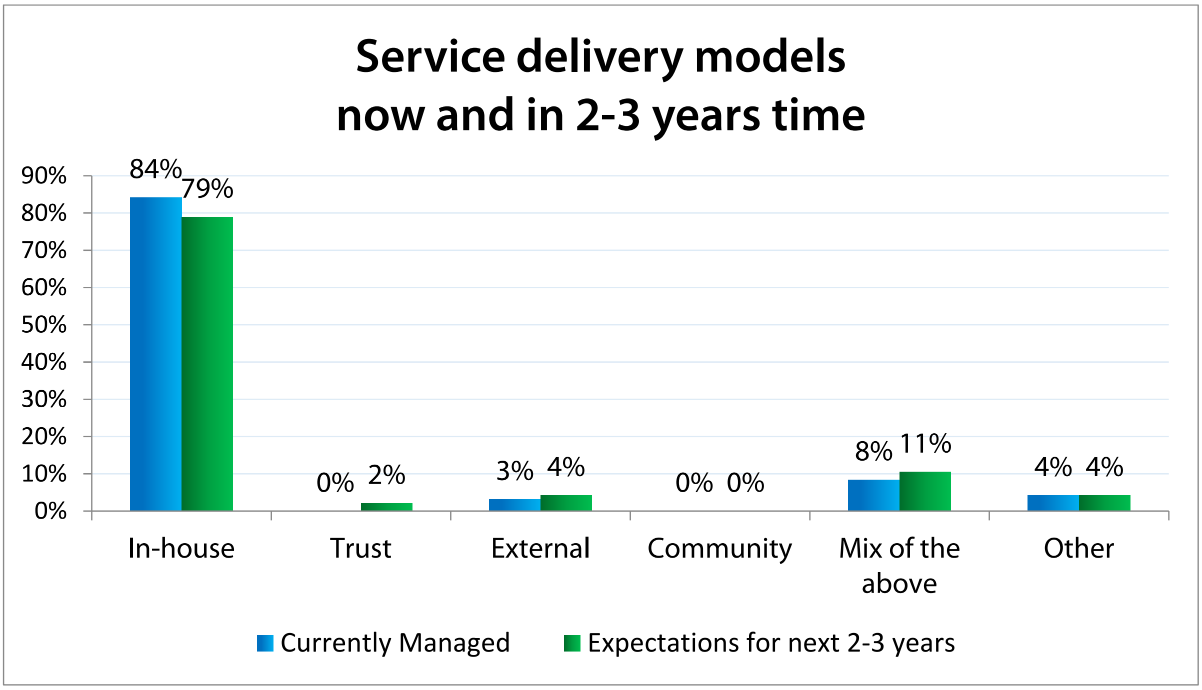



When asked about the number of visitors to formal parks during the past year, 62% said they had seen increases. 34% felt visitor numbers had remained the same and 4% believed visitor numbers had decreased.

Only 40% of survey respondents monitor visitor numbers through a mixture of footfall/visitor/gate monitors, car monitors/car park payment monitors, audits and visitor surveys, although still low this is a significant increase on 2019 when only 29% monitored visitor numbers.. 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.

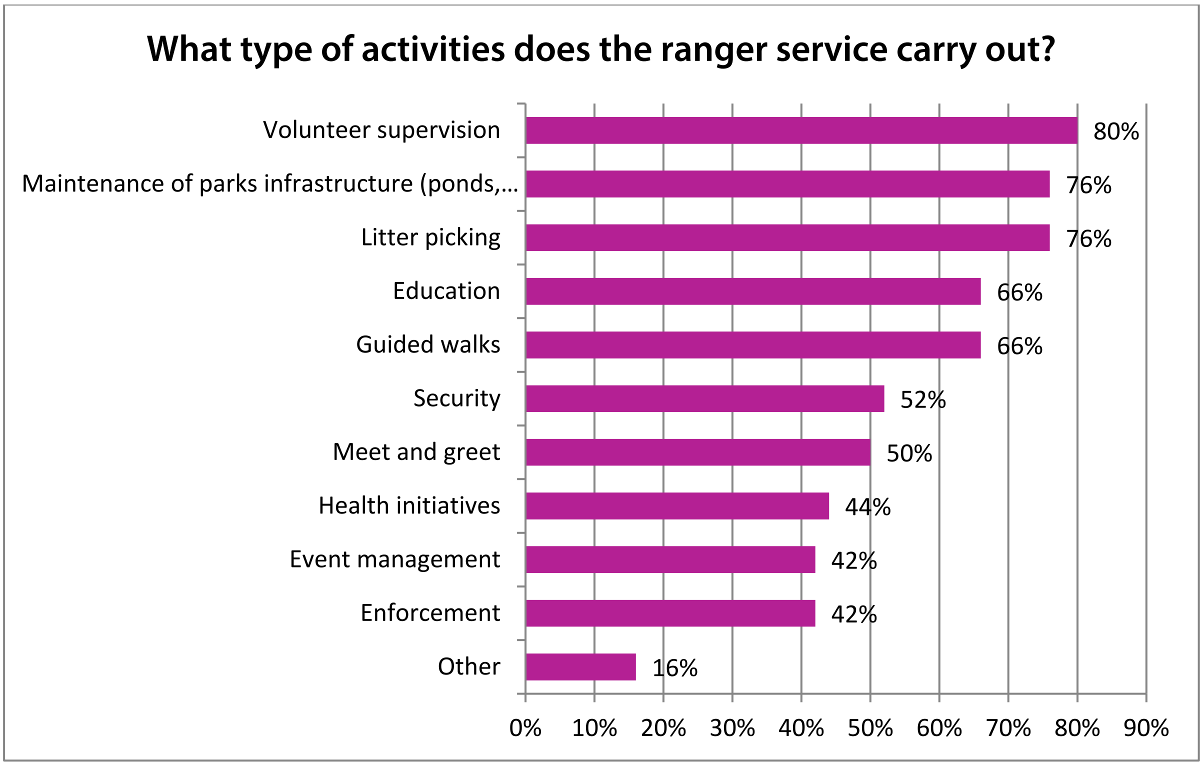
### d) Service delivery

84% of respondents currently have in-house services and 79% expect this to be the case in 2-3 years' time, which is a slight decrease on 2019 when 84% 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 11% expected a mix of in-house, trust, external and community management a slight fall on 2019.



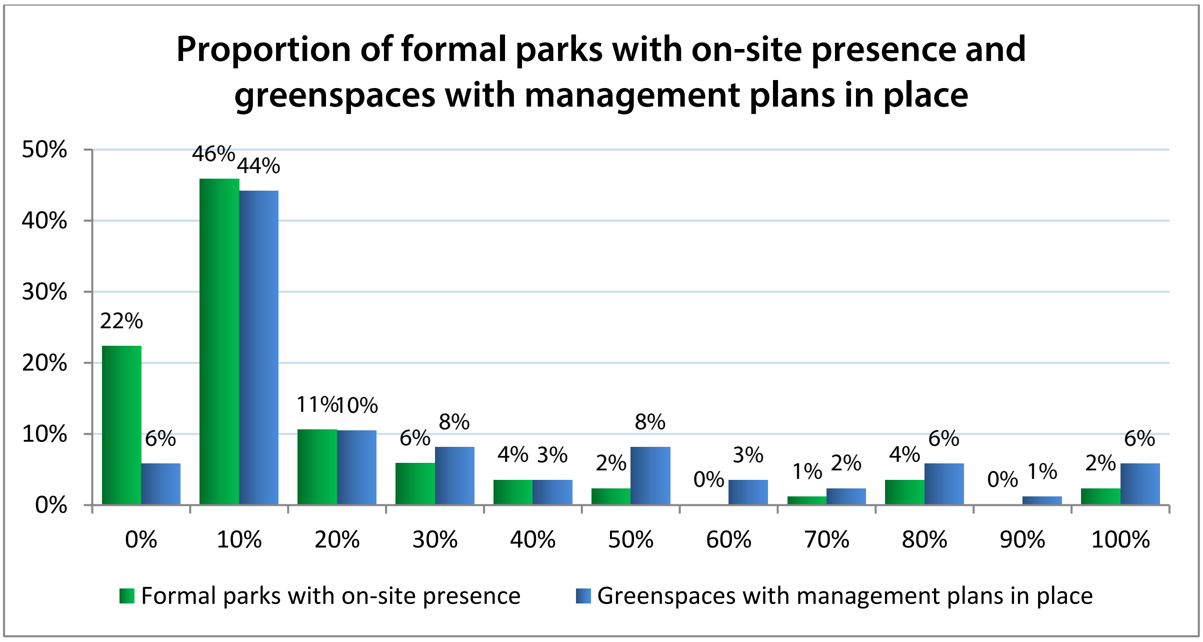

The bullet points below provide a useful summary of what is being delivered within the parks service and how it is being delivered according to those who responded to the survey:

48% reported having parks rangers,



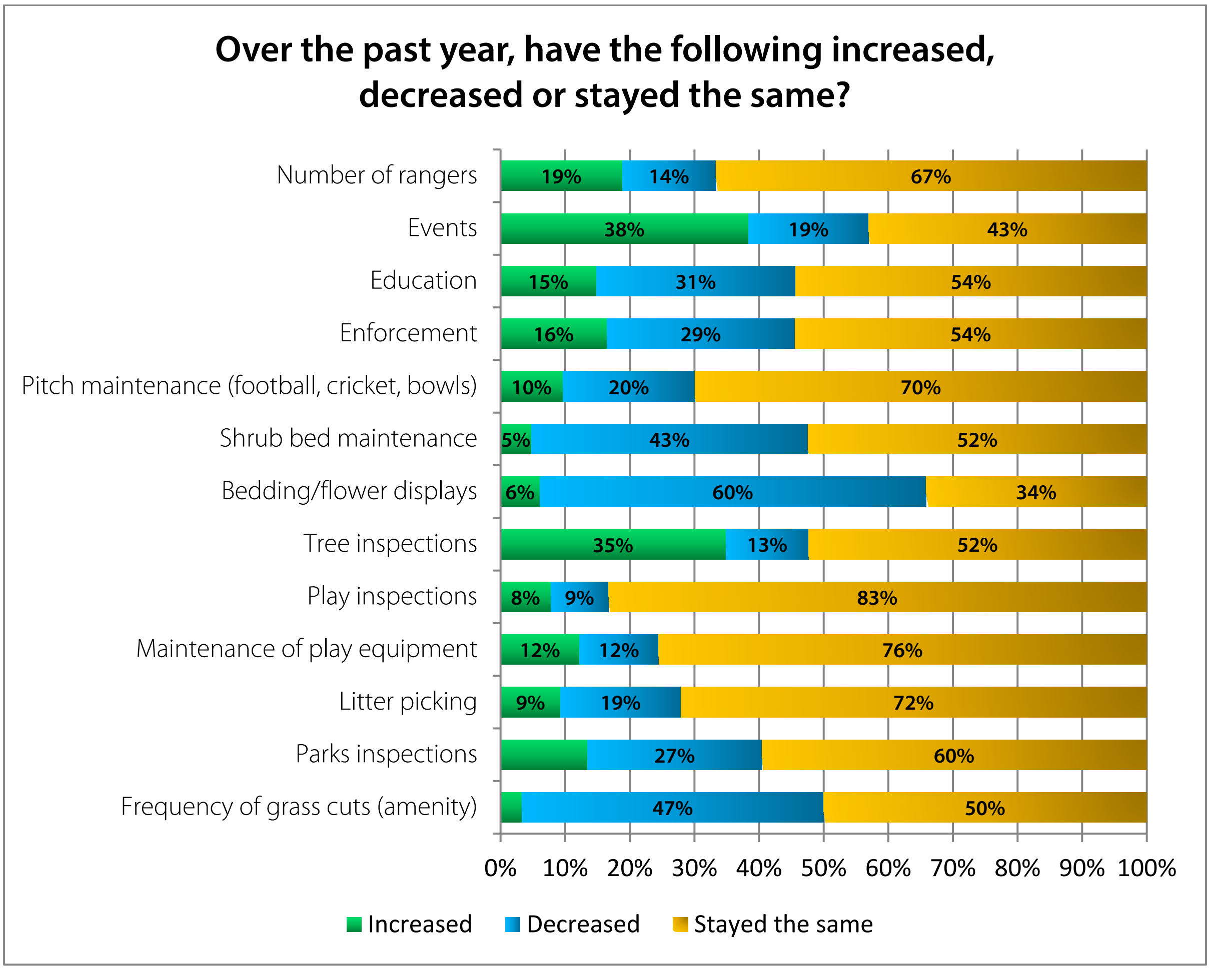

The most significant increase in roles is with regards to managing volunteers with over 80% of rangers are involved in this activity. The amount of time being spent on litter picking and infrastructure maintenance duties has also increased significantly.

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:-

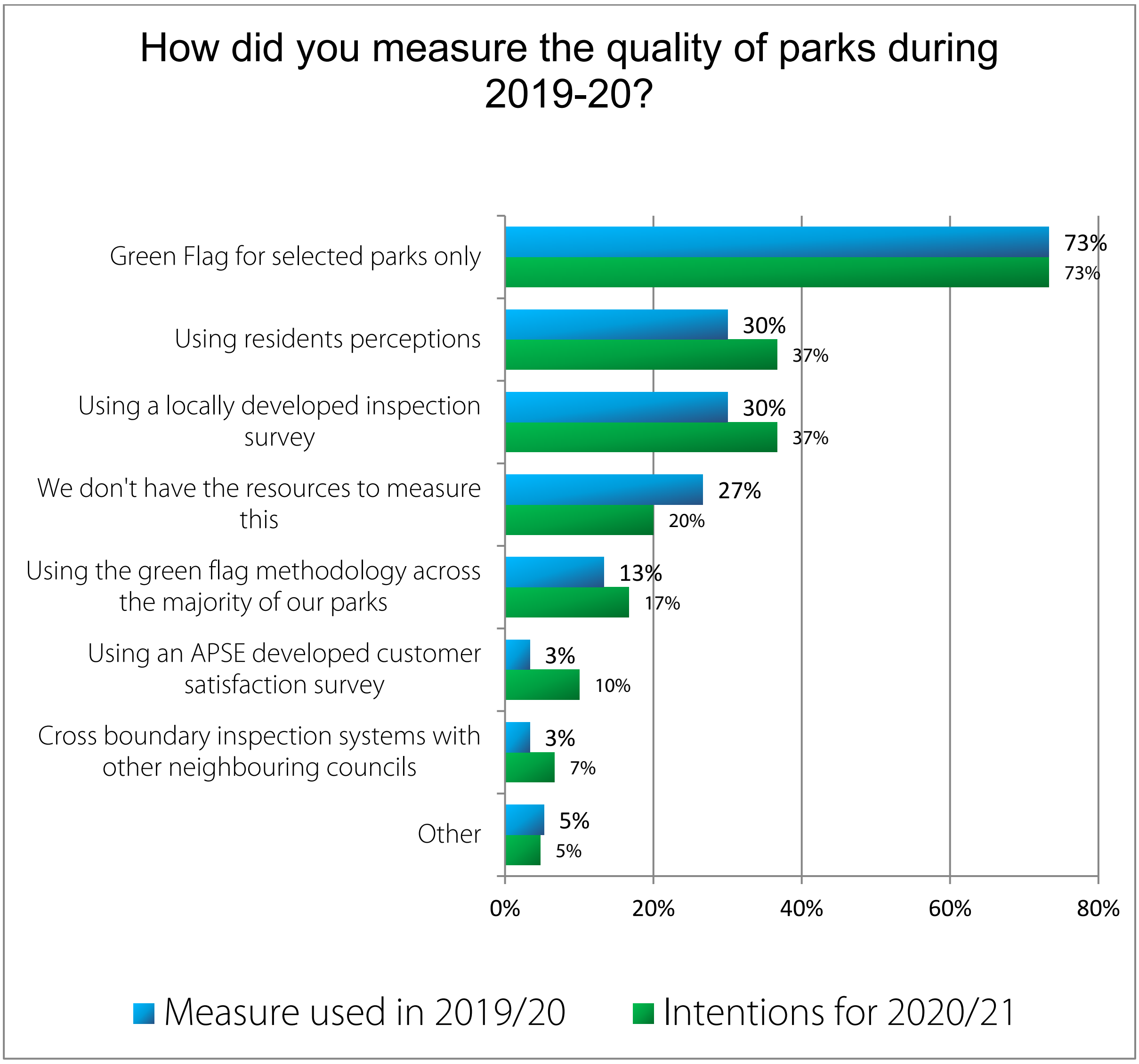
- Events
- Tree inspections
- Enforcement and education

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 10% stating 8 cuts or less, 8% stating more than 18 cuts.

6% used Cylinder machines for estate and highways grass cuts, 37% used Rotary, 23% used Flail and 59% 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 2020/21 and the results were as follows:

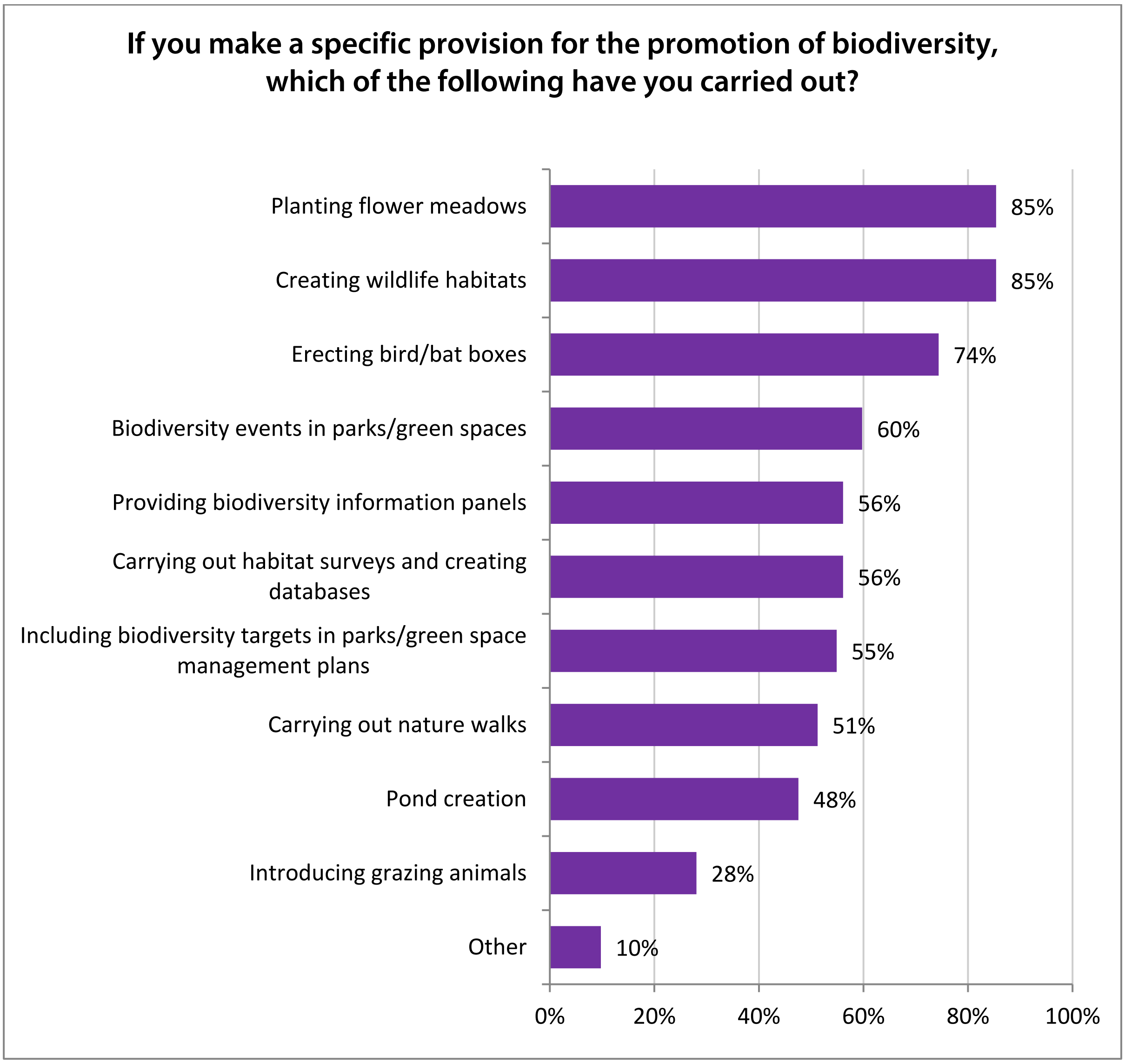



Respondents' intentions for 2020/21 saw a rise in APSE's customer satisfaction survey and locally developed systems.

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 tripled 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

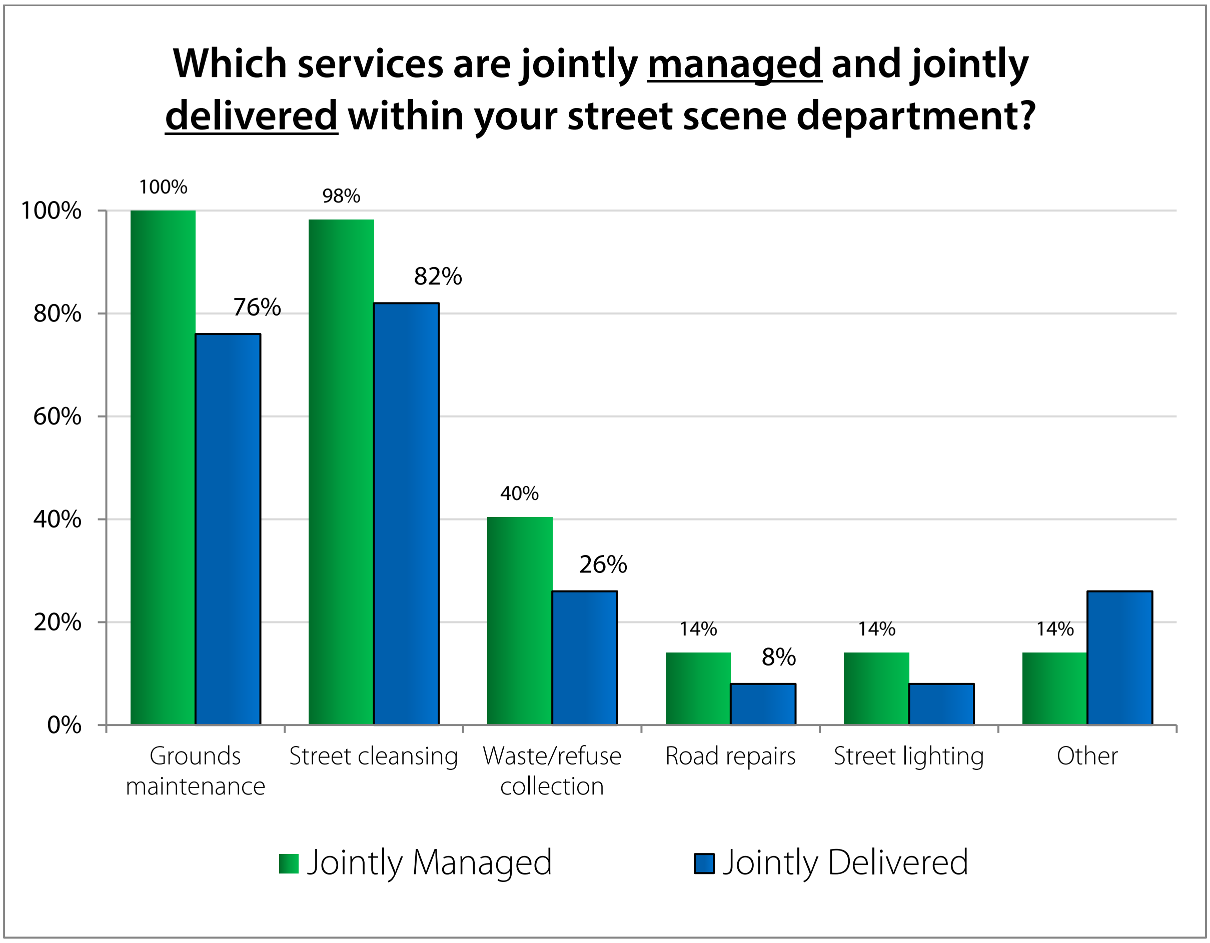
Almost 89% of respondents make a specific provision for promoting biodiversity in parks and green spaces (83% in 2019). Of those that make specific provisions, the respondents have carried out the following:-




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:

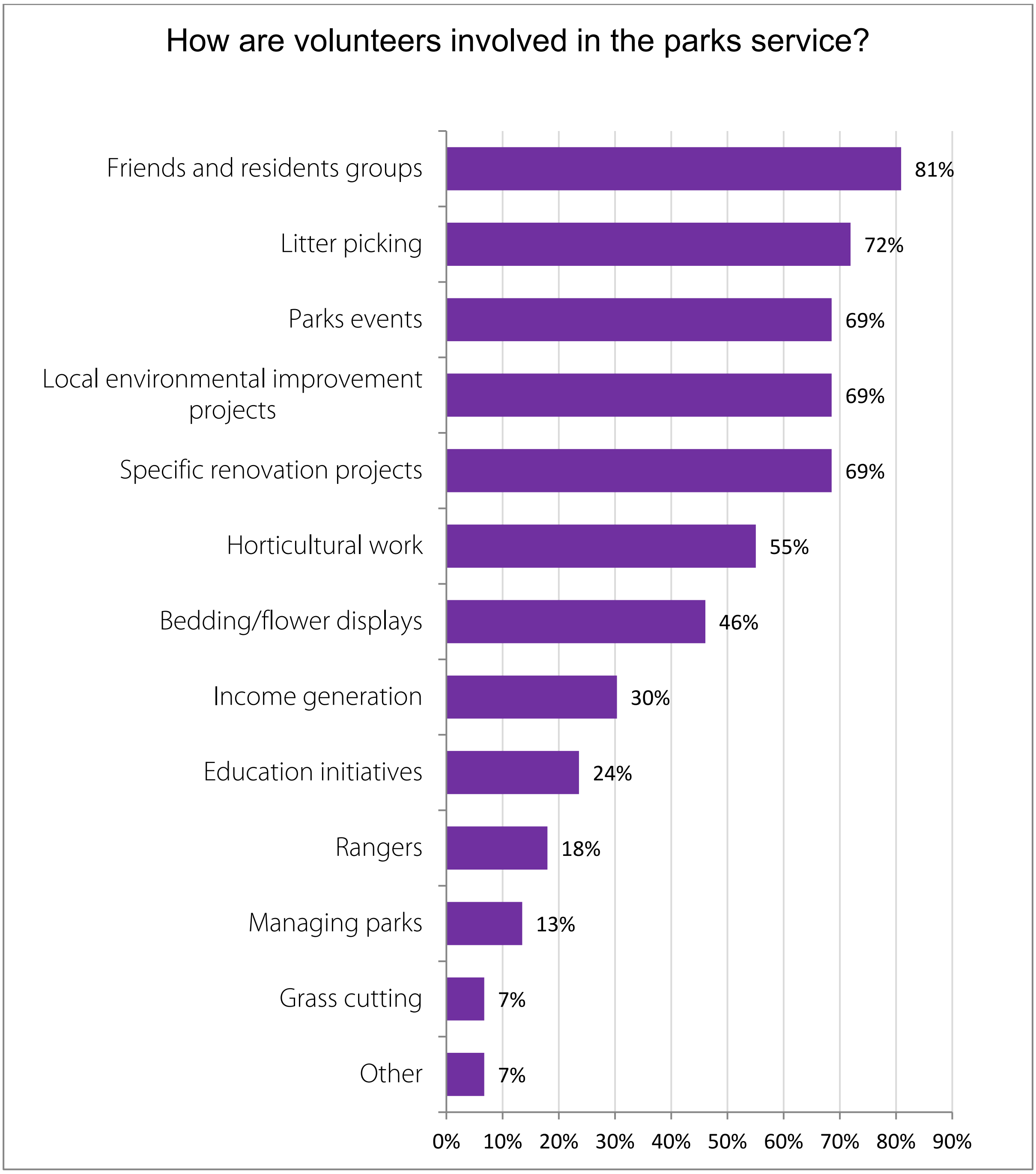



There has been a noticeable decrease in the number of services being jointly delivered. Most notable is the reduction in joint deliver of grounds maintenance and street cleansing where although joint management is high the joint deliver element has fallen by 20% or more on the previous year's figures, perhaps suggesting there is still a degree of specialist skills required in these services. Out of the respondents who answered that they are not already part of an integrated street scene service, 12% expect to become part of an integrated service in the near future a rise of 4% on 2019.

## h) Community and volunteer involvement

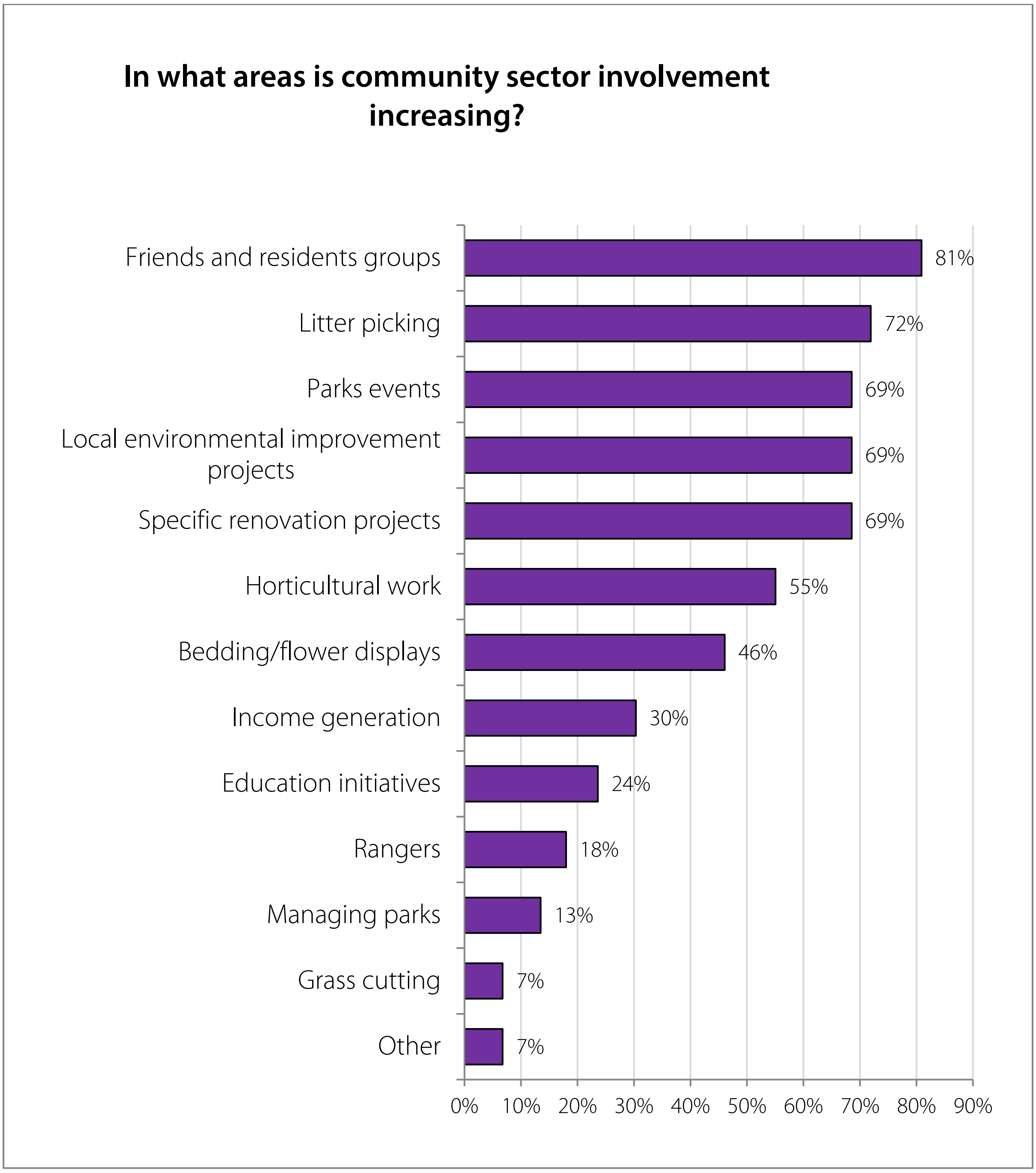
90% of respondents had friends of parks groups operating in their localities.

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

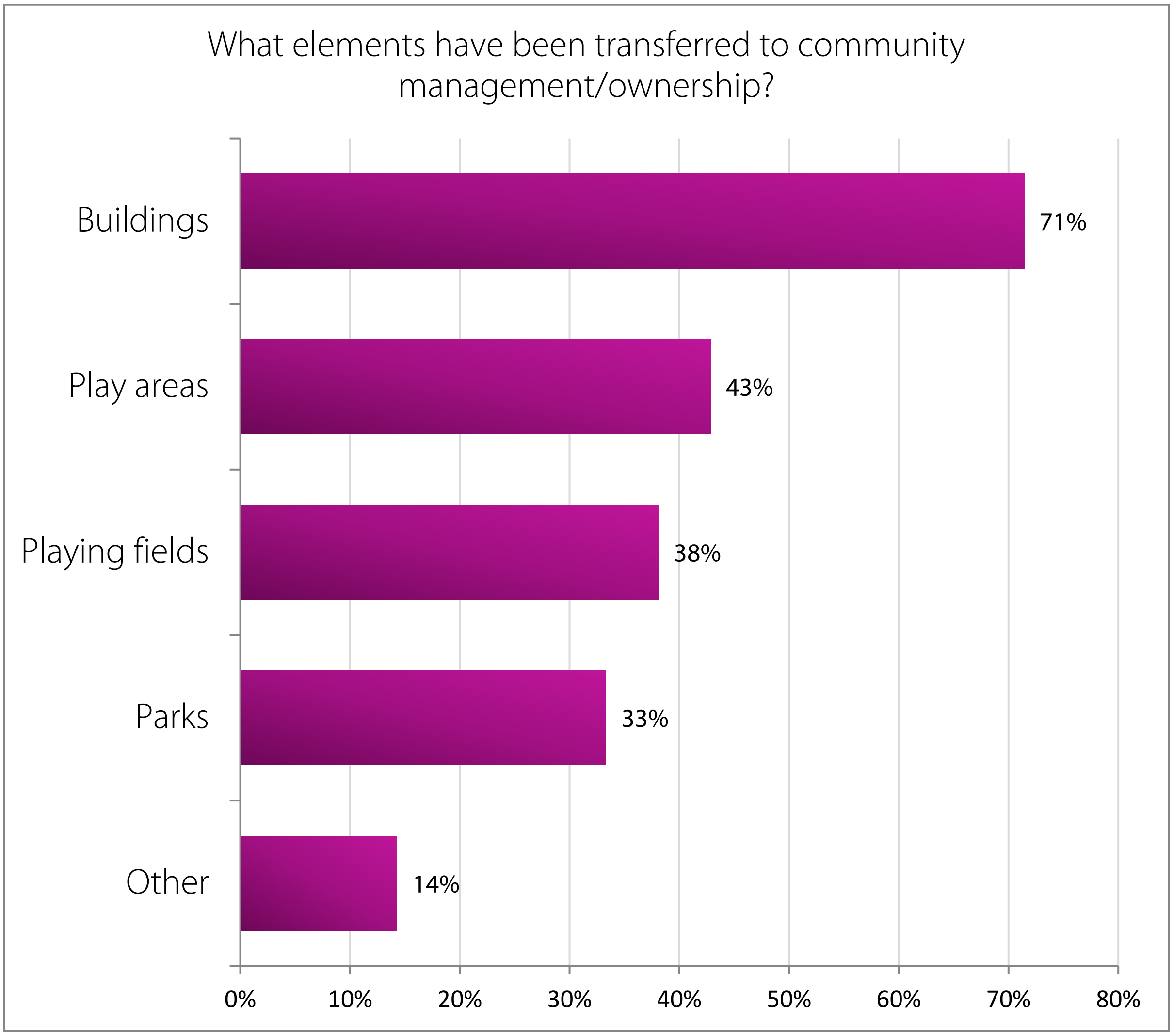



The results show that volunteers tend to be involved more in friends and residents groups (90%) and specific projects like parks events (69%). There has been a rise in the number of volunteers involved in litter picking, education initiatives, income generation and specific renovation projects.

53% of respondents thought that community sector involvement in parks is increasing either slightly or significantly in the following areas:

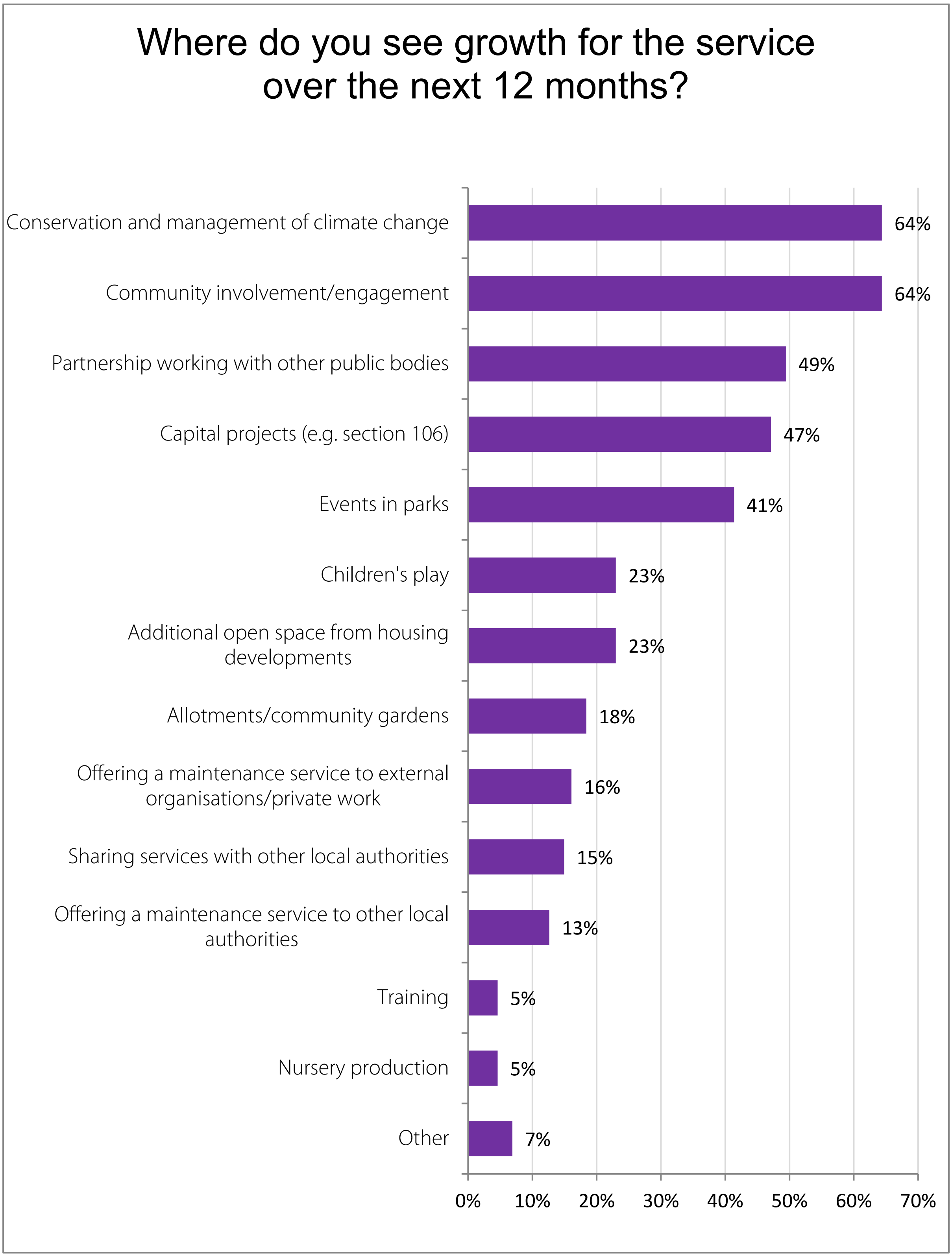



When asked 'during the past 2 years whether your council transferred any of its parks assets to community management/ownership', 20% said yes, a fall of 13% on 2019) and 22% said their council is looking at this (a 5% fall on 2019). Respondents stated that the following elements had been transferred to community ownership:



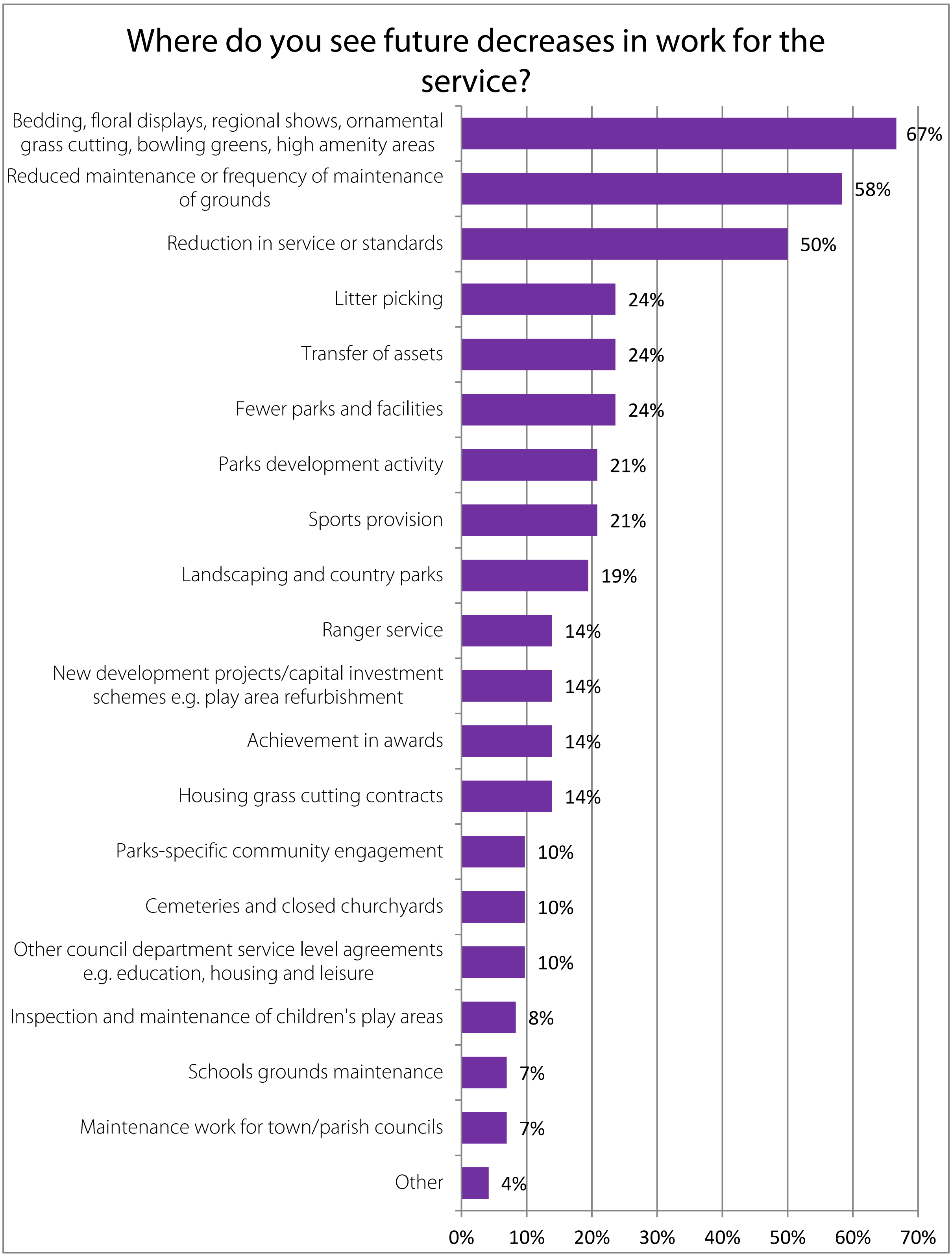

## i) Future growth and decreases in work for the service

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




The most notable change on 2019 are with regards to growth in the areas of conservation and management of climate change rising form 39% in 2019 to 64% in 2020.

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



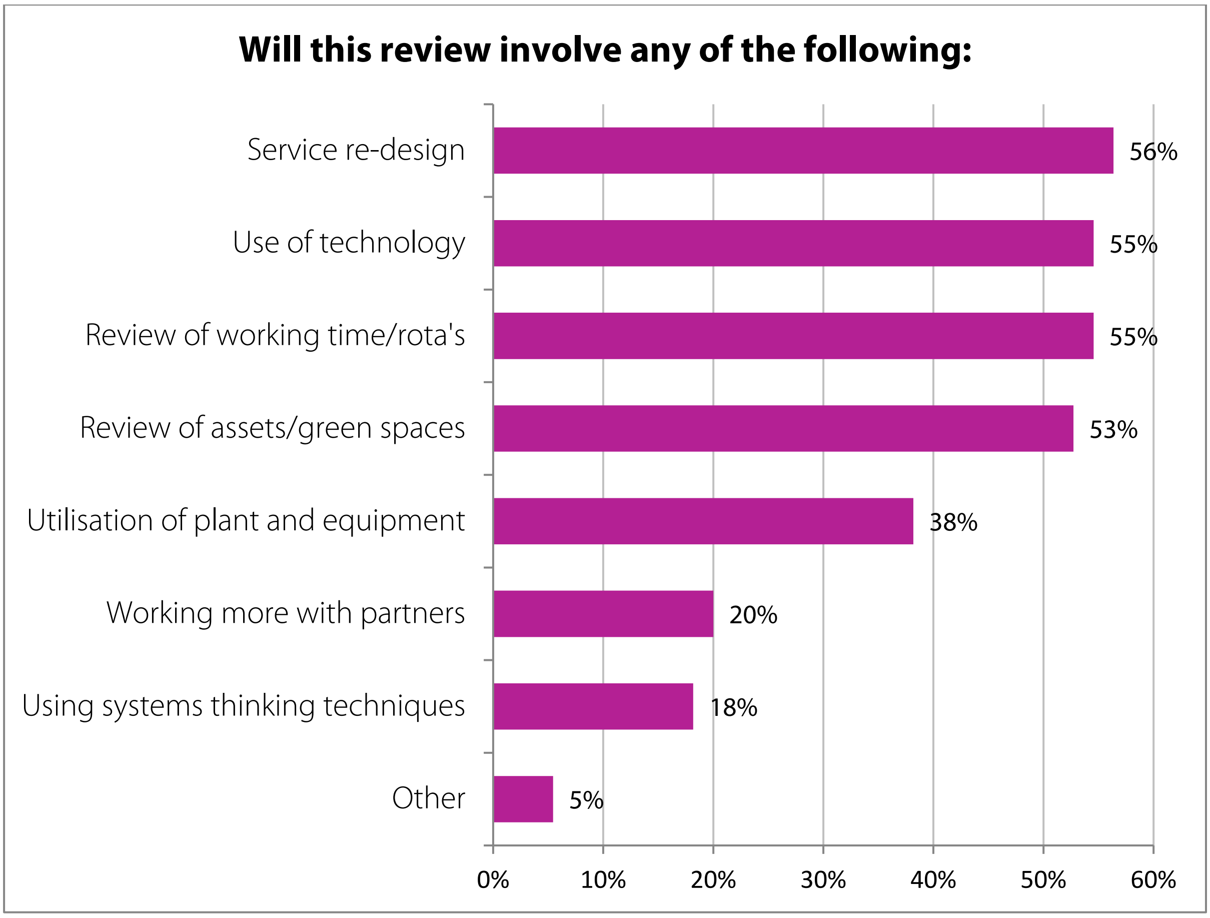

The most notable elements of this table when compared with 2019 results is that there are slight increases in reductions in core work such as reductions in service standards, reduced maintenance frequencies, housing grass cutting contracts and maintenance work for town/parish councils.

The number of respondents suggesting such areas will decrease compared to 2019 suggests that despite some signs of budget cuts being less severe, the lack of optimism that these areas of work will not be cut any further, is still a worry

## j) Service reviews

29% of respondents had recently completed a service review (38% in 2019), 25% were currently underway (41% in 2019) and 23% plan to do so in the next 1-2 years. Surprisingly, 23% 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. But we have seen on 2020 again there are some respondents looking at budget increases of between 5-10%

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.

However it is noticeable in this year's results that there is still an element of resistance to income generation from the public and some elected members. Therefore the message appears to be that the 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 announcements of additional pockets of funding will help those parks in need of renovation and 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-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 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.

Indeed both climate change and biodiversity issues have clearly come to the fore in this year's survey results, with councils striving to meet climate change targets and protect and enhance biodiversity, management of greenspaces are being transformed , most notably perhaps with the reduction in chemicals being used to manage weeds and through the creation of more naturalised planting schemes.

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, 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**