



membership resources

State of the Market Survey 2012

Local Authority Refuse Services



Briefing 12/29

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The state of the market survey was conducted by Debbie Johns, APSE Principal Advisor for Environmental services

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Local Authority Refuse Services

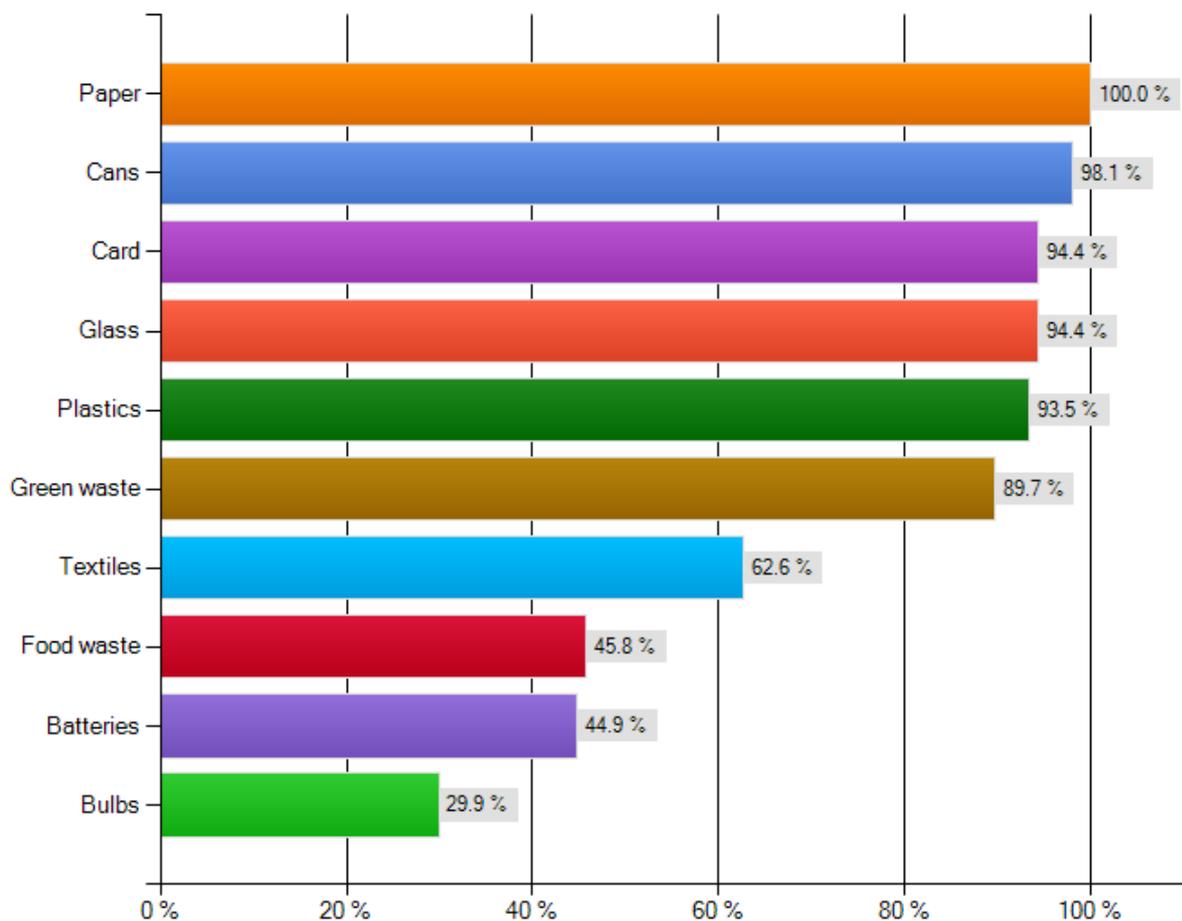
State of the Market 2012

APSE conducted an on-line survey during April and May 2012. This follows on from the 2011 and 2008 Refuse Collection State of the Market surveys where similar questions were asked to allow for trend comparisons. The 2011 results can be accessed by [clicking here](#) and the 2008 results can be accessed by [clicking here](#). 109 responses were received from local authorities throughout the UK. This report identifies the key findings of the survey.

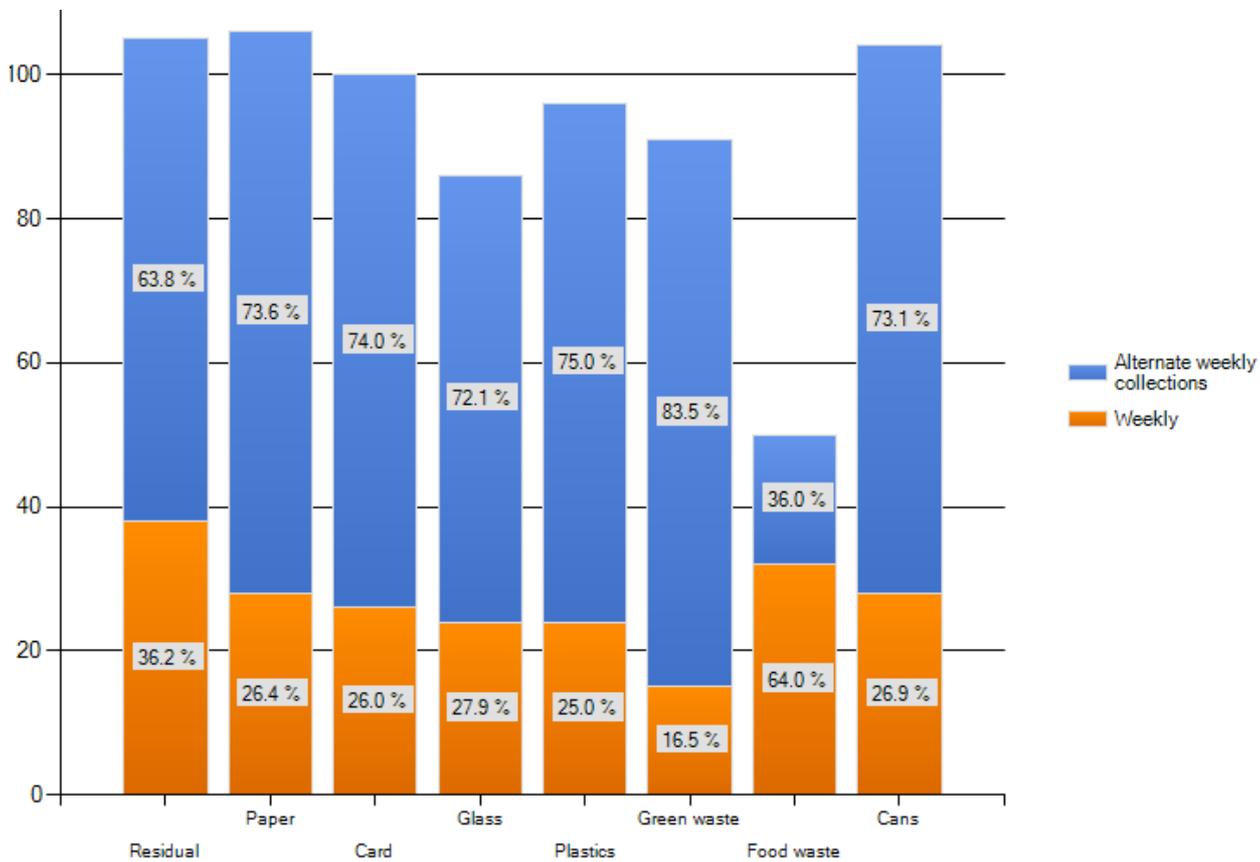
Results from the survey

a) Recycling activities

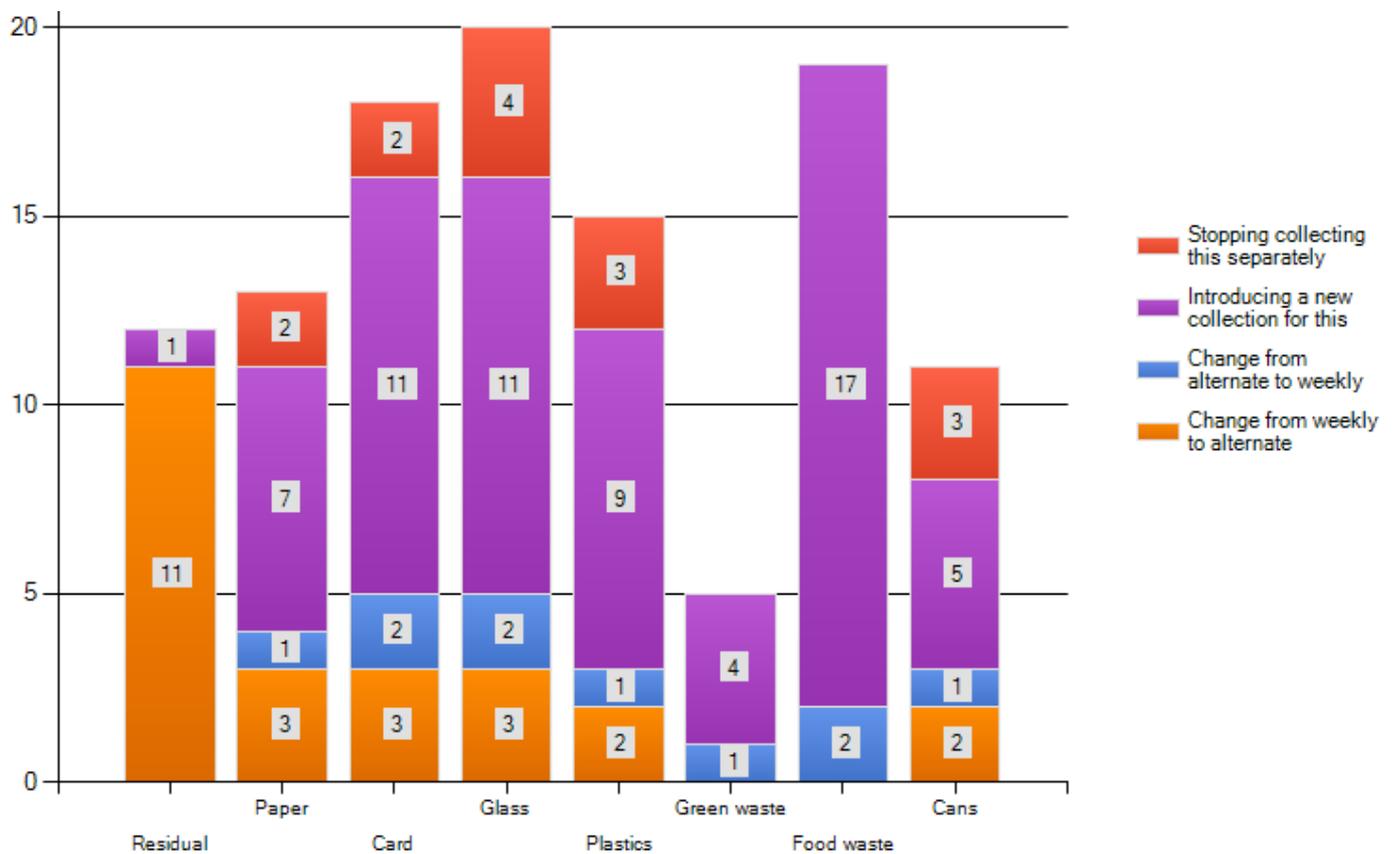
In terms of what recycling activities are currently carried out, the results were as follows:



In relation to the frequency of collections (weekly or alternate collections), the number of responses for each of the different types of collections (and the percentage breakdown between weekly and alternate collections) were as follows:



Members were asked whether there were going to be any changes to their residual and recycling collections in the next 2 years. The number of respondents who indicated that there is going to be changes are displayed below:



As can be seen above, the main changes are 11 respondents indicated that they are going to change from weekly to alternate collections for residual , 11 respondents are introducing new collections for card and glass and 17 respondents are introducing a new food waste collection service.

A new question in this survey was asked this year in relation to whether respondents had made a bid for the Weekly Collections Support Scheme (funding made available by Communities and Local Government designed to support local authorities to introduce, retain or reinstate a weekly collection of residual waste and/or recycling (for example food waste)). 40% answered 'yes' to this question and the main reasons for applying for this were the introduction, continuation or extension of food waste collections (e.g. to flats), to retain residual weekly collections or the collection of nappies.

b) Collections and disposal methods

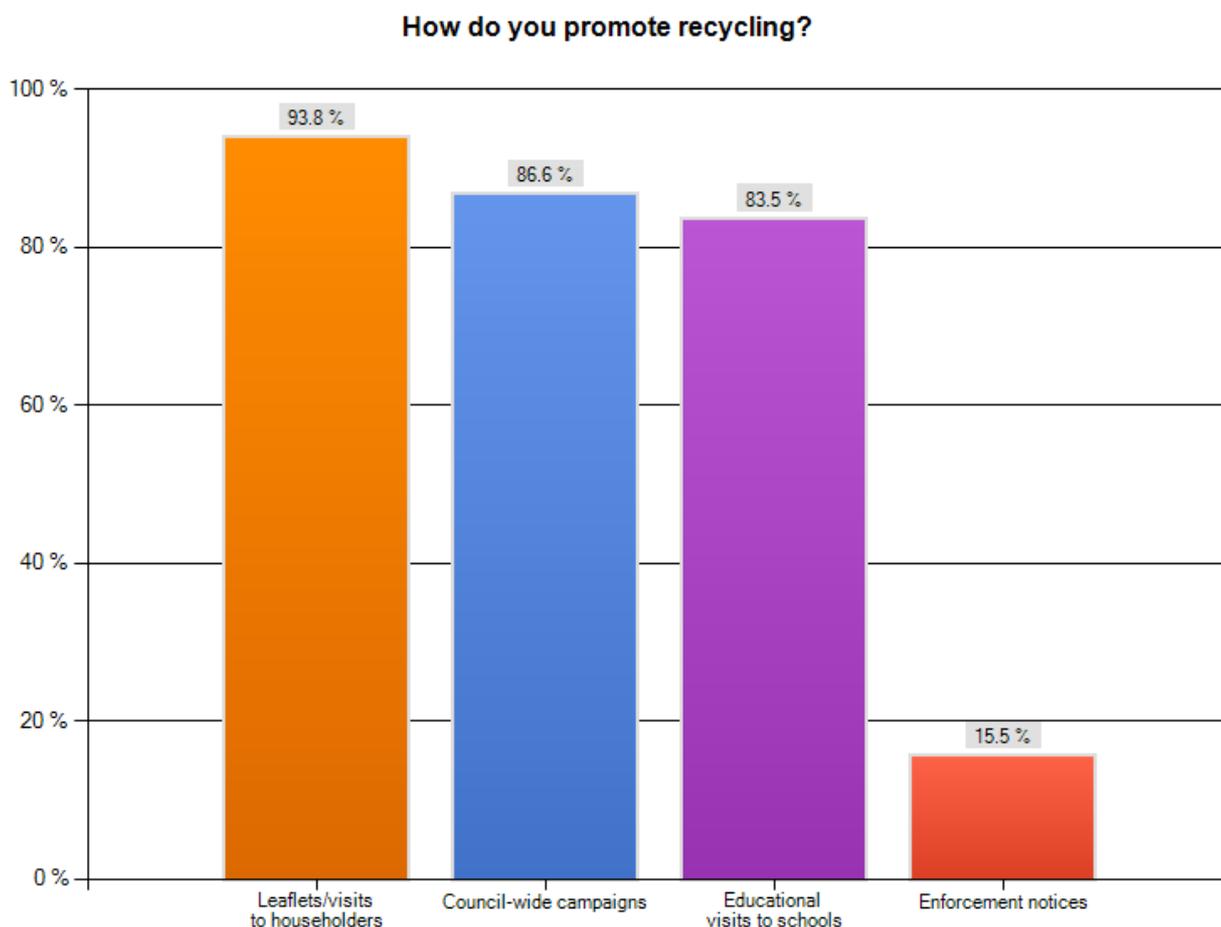
52% of respondents indicated that they operate a task and finish system for refuse collection (slightly reduced from 60% in 2011) and 32% have zonal working (collecting all waste from one zone on the same day).

51% operate a 5-day week, whereas 18% operate a 4-day week. Only 1% of respondents have a double shifting system in place.

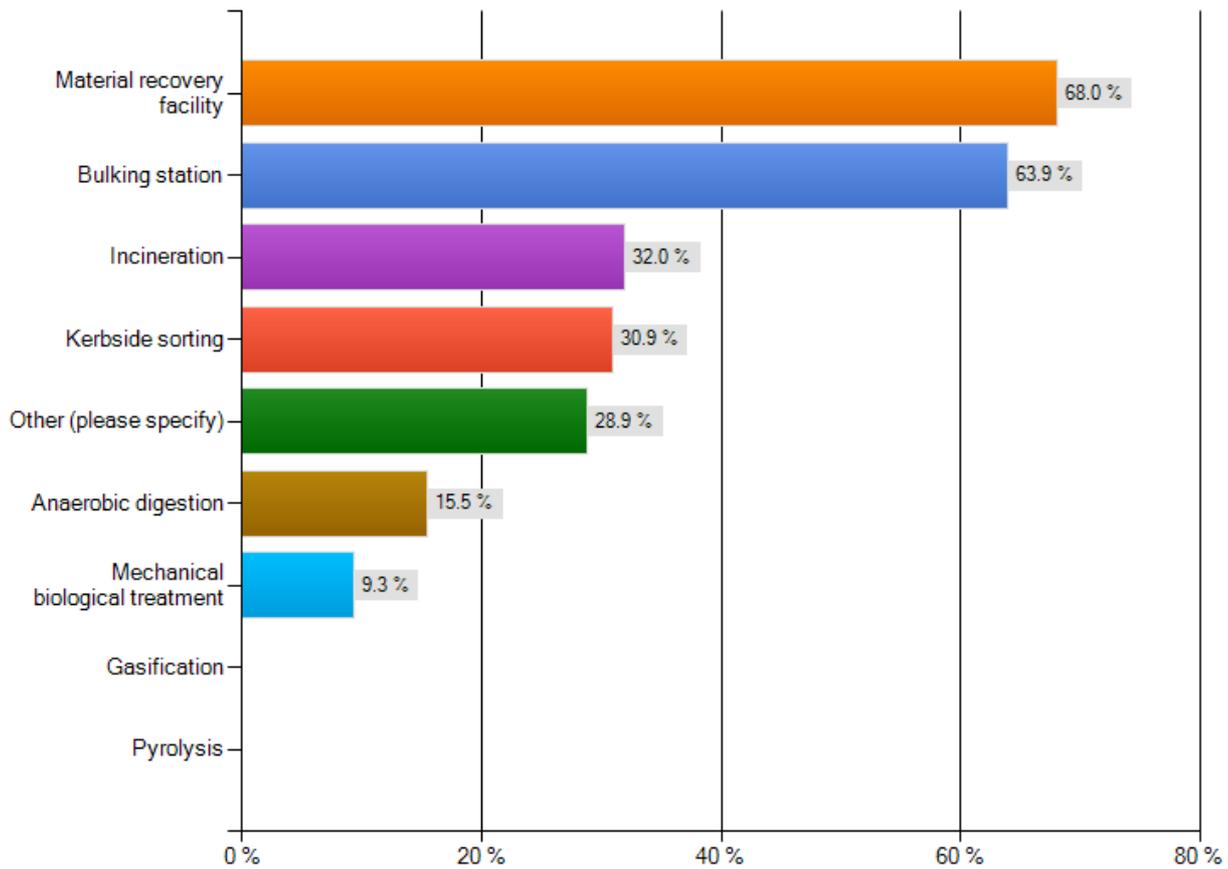
On average, 4.97% of containers are replaced every year (including residual, kerbside recycling, green and kitchen waste).

72% operate co-mingled collections, which is very similar to the 2011 survey results.

The following chart shows a breakdown of methods used to promote recycling.

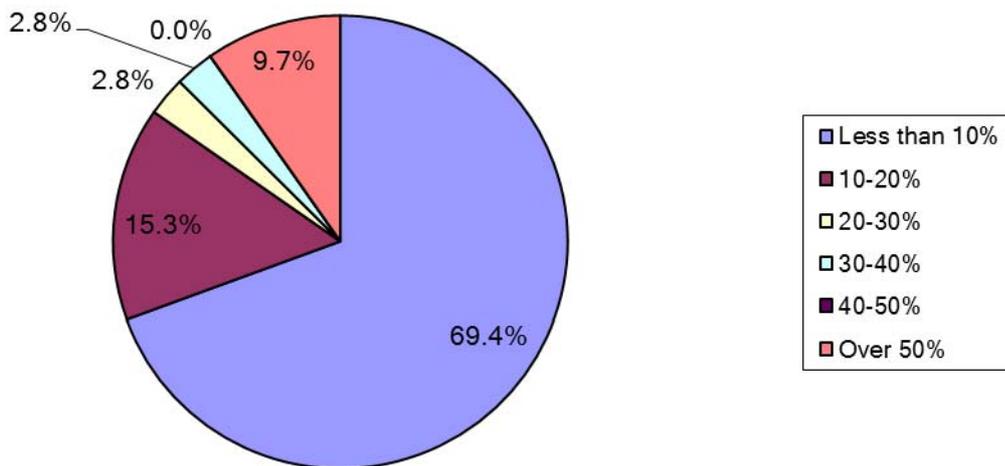


Treatment and sorting facilities include:



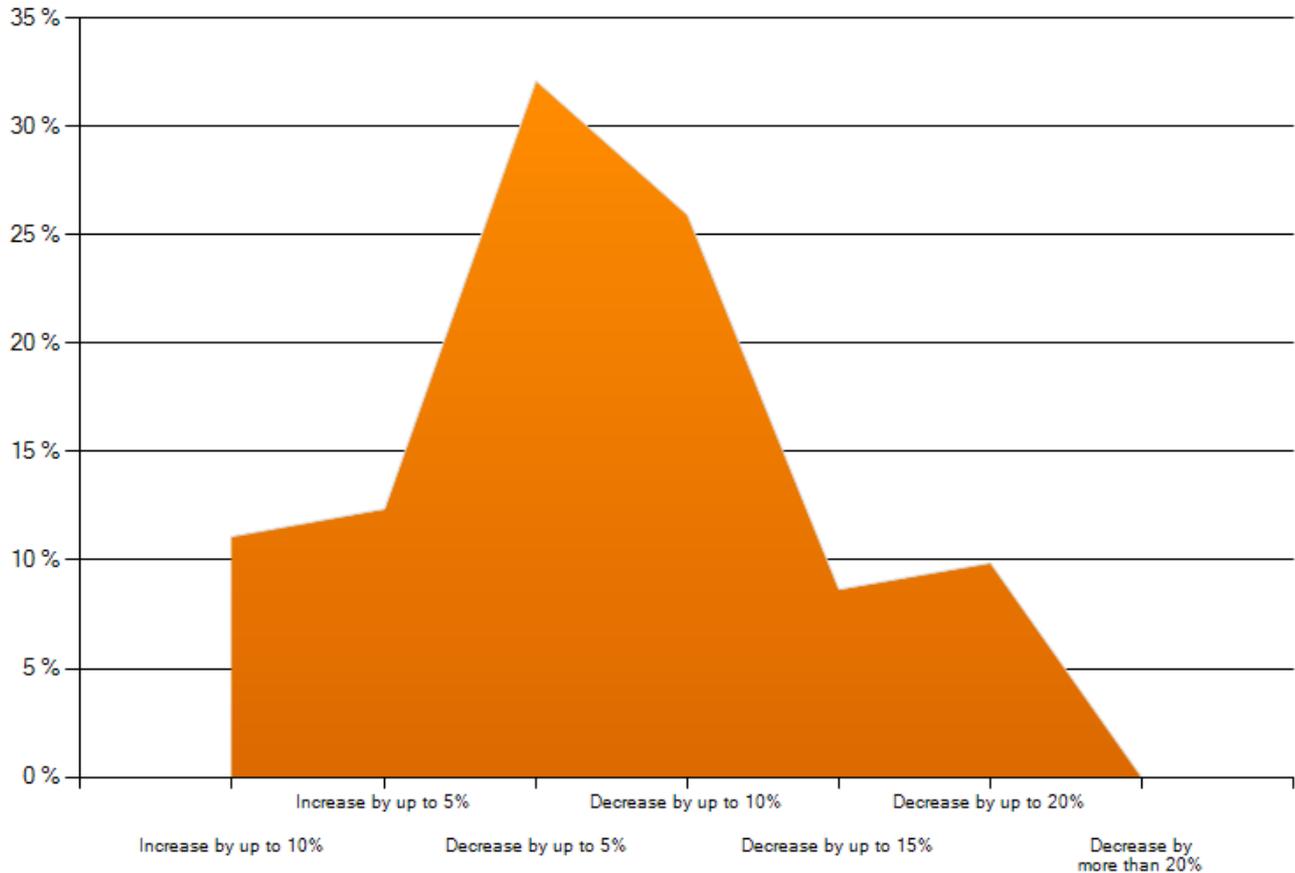
c) Investment in and managing the service

When asked what additional capital investment has been required in the past 2 years, the responses were as follows:



70% expect the refuse budget to change next year, with the majority (69%) expecting a decrease in revenue and some (34%) expecting a decrease in capital. Over the next 5 years, the majority of respondents expect to see a reduction in their service budgets of up to 5% or 10% (which is similar to the 2011 results).

What is your expectation of the level of funding in your service budget in the coming five years?



This year, the survey asked ‘What efficiencies are you currently working towards or proposing’ and the main responses to this question are as follows:

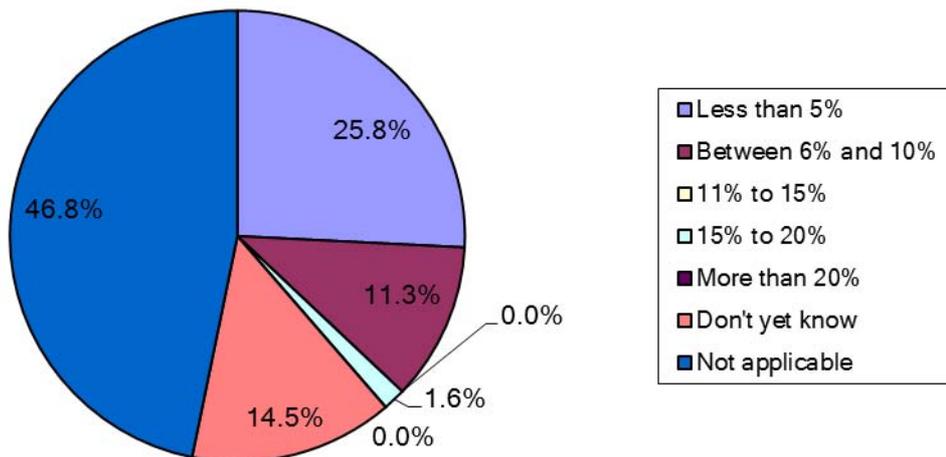
- Changing working days (e.g. 4 day week), shift patterns (e.g. double shifting), ending task and finish and staff reductions
- Route optimisation
- Changes to collections (comingling, communal collections, alternate weekly collections, type of containers)
- Review of transport/type of fleet/increasing capacity of vehicles
- Introduction of income streams (trade waste, bulky waste, green waste, replacement bins, schools/charities)
- Removal of garden waste during the winter
- Review of bring banks

The survey asked about whether councils charge for the following services and the results are as follows:

	Yes	No but will do within the next 1-2 years	No
Supply of bins	38	5	40
Bulky waste collections	75	0	15
Clinical waste collections	3	2	50
Trade waste collections to schools and hospitals	67	7	5
Green waste collections	23	4	52

On employment related matters within the next 12 months, 47% expect natural wastage, 26% expect to implement a recruitment freeze, 34% voluntary redundancy and 8% compulsory redundancy. 32% of authorities have indicated that they intend to implement none of these. Compared to the survey findings from 2008 where 55% expected a recruitment freeze, 49% expected voluntary redundancy and 25.5% expected compulsory redundancy; this year's figures show a slightly improved expectation in relation to staffing issues which may be due to the fact that the majority of the staffing reductions may already have been made.

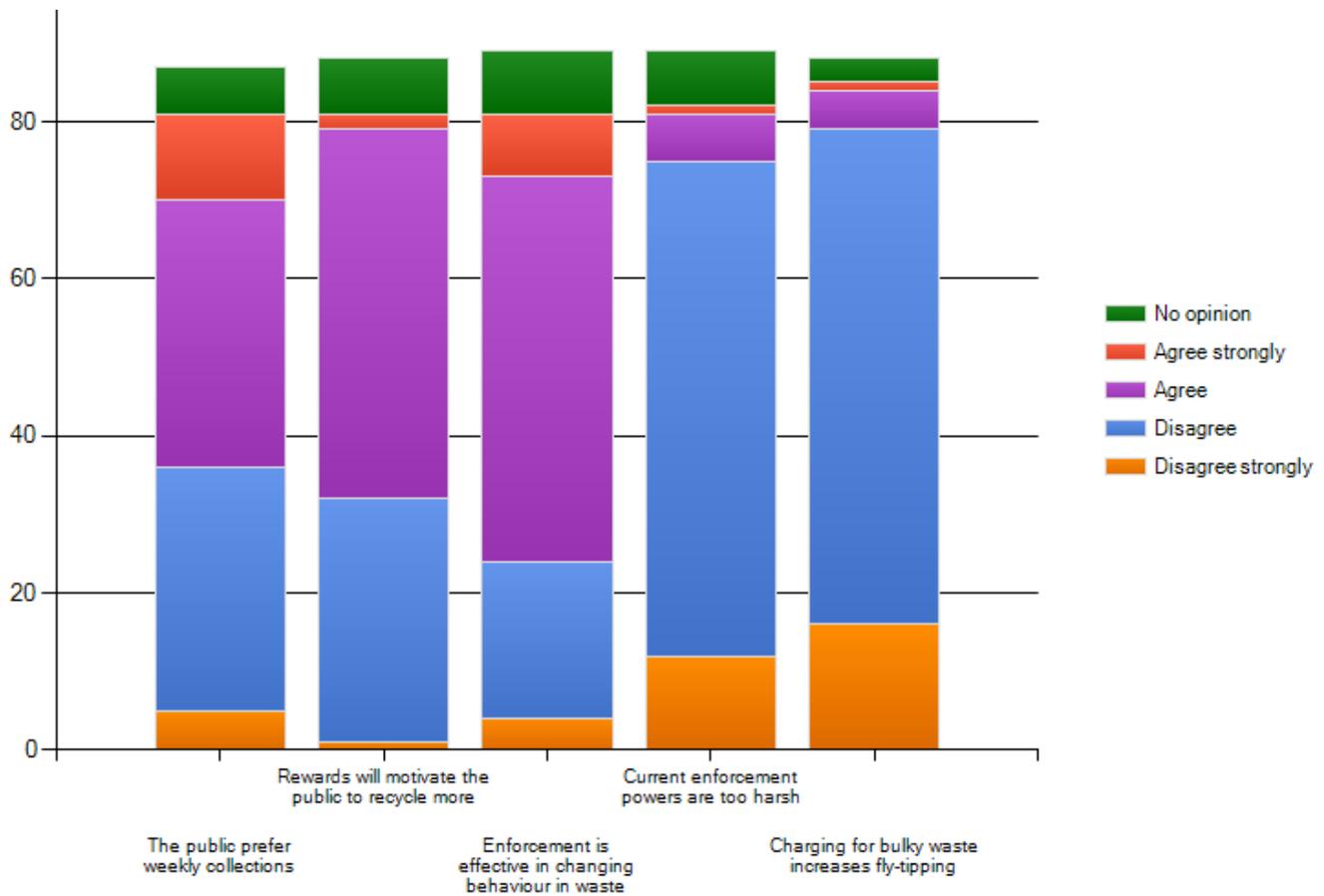
Of those services who expect to be subject to redundancy measures, they expect to lose the following percentage of staff from the service:



83% currently manage their service in-house and 73% expect their service to be managed in-house within the next 2-3 years (compared with 66% in 2011). The fact that only 69% of respondents expected to be in-house in the next 2-3 years when the survey was conducted in 2008, but in reality, 83% of this year's survey respondents stated that their service is in-house demonstrates the continued relevance of in-house services during an era of budget reductions and demonstrates that a change of management type isn't being seen as a panacea to meeting the efficiency savings required. The other responses to the 2012 survey included 6% expect to be managed by Joint Waste Authorities and 12% stated external management.

d) Your opinions

The chart below shows the breakdown of respondents who agree/disagree with the statements.



e) Staffing

Members were asked whether they thought that staff absence levels are at an acceptable level. The responses are shown in the chart below:

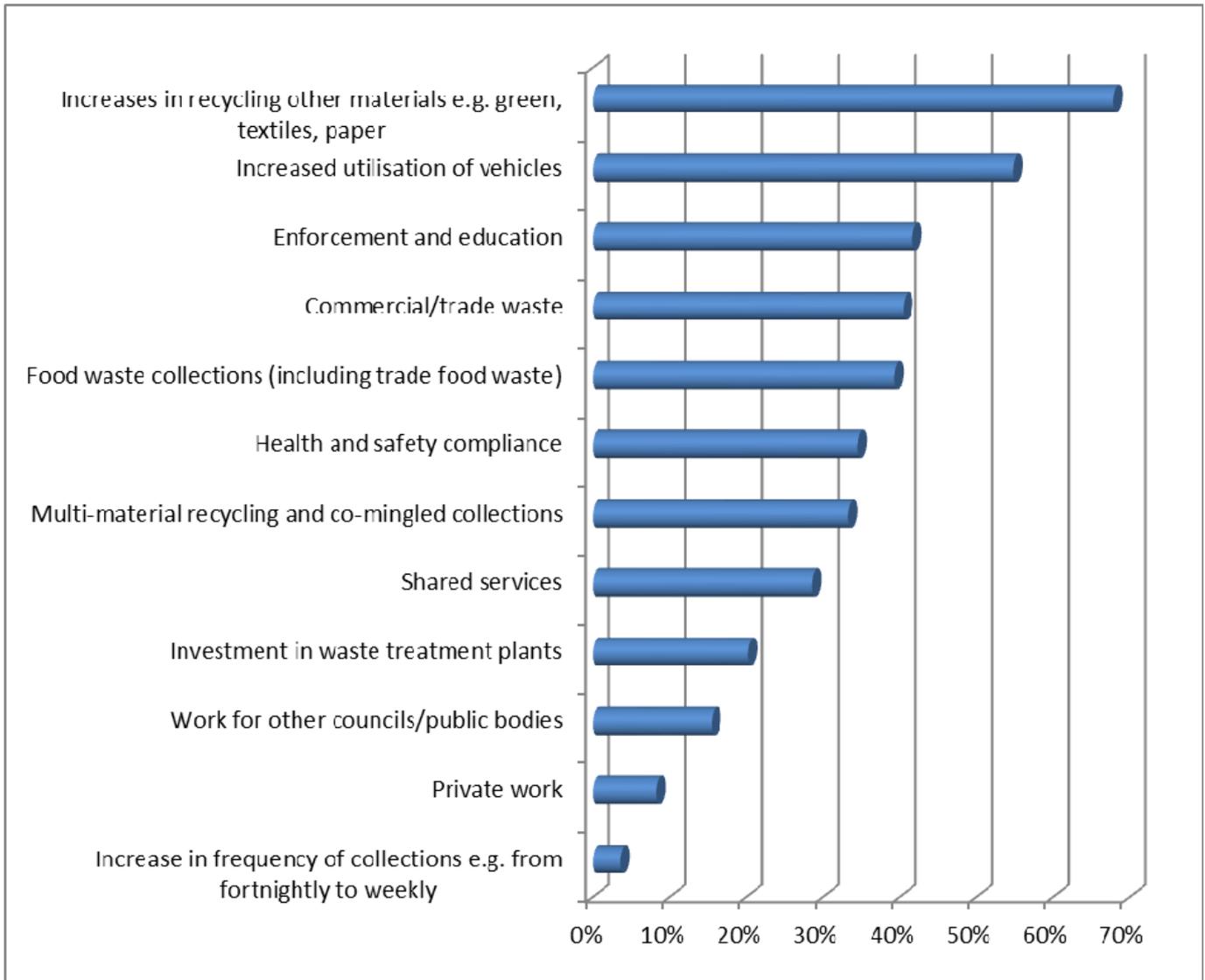
Answer Options	Response %
Too high	20.7%
Slightly above average	29.9%
About average	32.2%
Slightly below average	6.9%
Very low	10.3%

Compared to the 2011 survey, more respondents feel that staff absence levels are very low (6.5% in 2011) and less feel that they are too high (23.4% in 2011).

Only 5% envisaged an increase in the training budget over the next 12 months, with 15% stating that this will decrease and 80% stating that this will stay the same. This is a much improved picture since the survey was conducted last year where 52% thought that this would decrease and 41% thought this would stay the same.

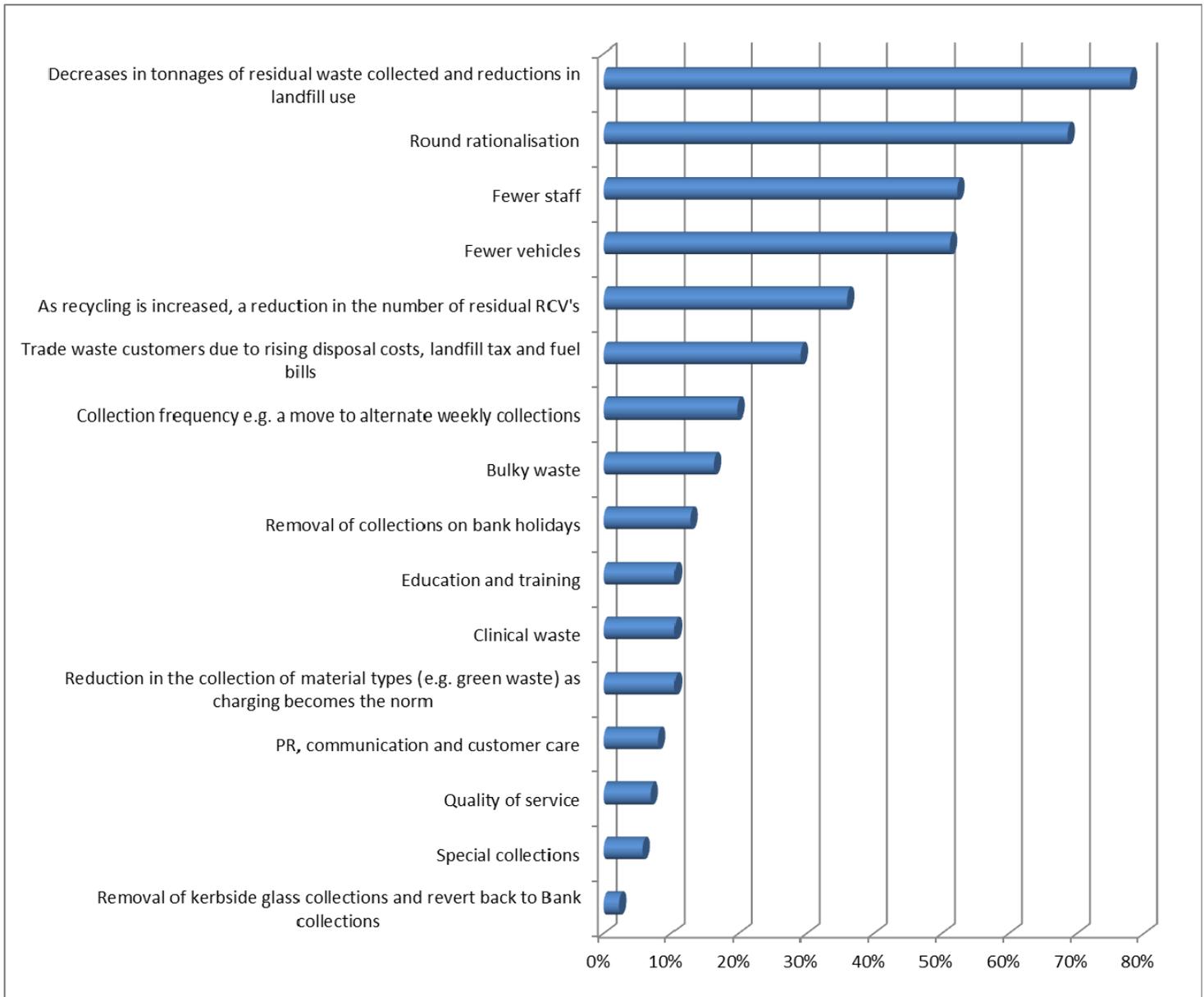
f) Future areas of work and service reviews

Respondents were asked where they see growth for the service over the next 12 months and responses included:



Therefore, despite the budget reductions facing the service, encouragingly, the majority of respondents expect to increase the range of recyclates.

Respondents were then asked where they see future decreases in work for the service:



When asked if respondents had undertaken a service review recently, 40% stated that they have completed this, 39% stated that they have a review which is underway and 15% stated that they will be doing so in the next 1-2 years. Only 6% said 'no' and they won't be undertaking a review in the next 1-2 years.

Respondents stated that the reviews involved the following:

Answer Options	Response %
Route optimisation	86.1%
GPS tracking	59.7%
CRM handhelds	29.2%
Eco drive vehicle monitors	25.0%
Review of productivity/work study	48.6%
Utilisation of vehicles	86.1%
Review of working time/rota's	55.6%
Service re-design	62.5%
Using systems thinking techniques	16.7%
Other (please specify)	8.3%

The Association for Public Service Excellence

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 authorities 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