

State of the Market Survey 2018

Local Authority Street Cleansing Services



Briefing Note 18-14

March 2018



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

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Local Authority Street Cleansing Services

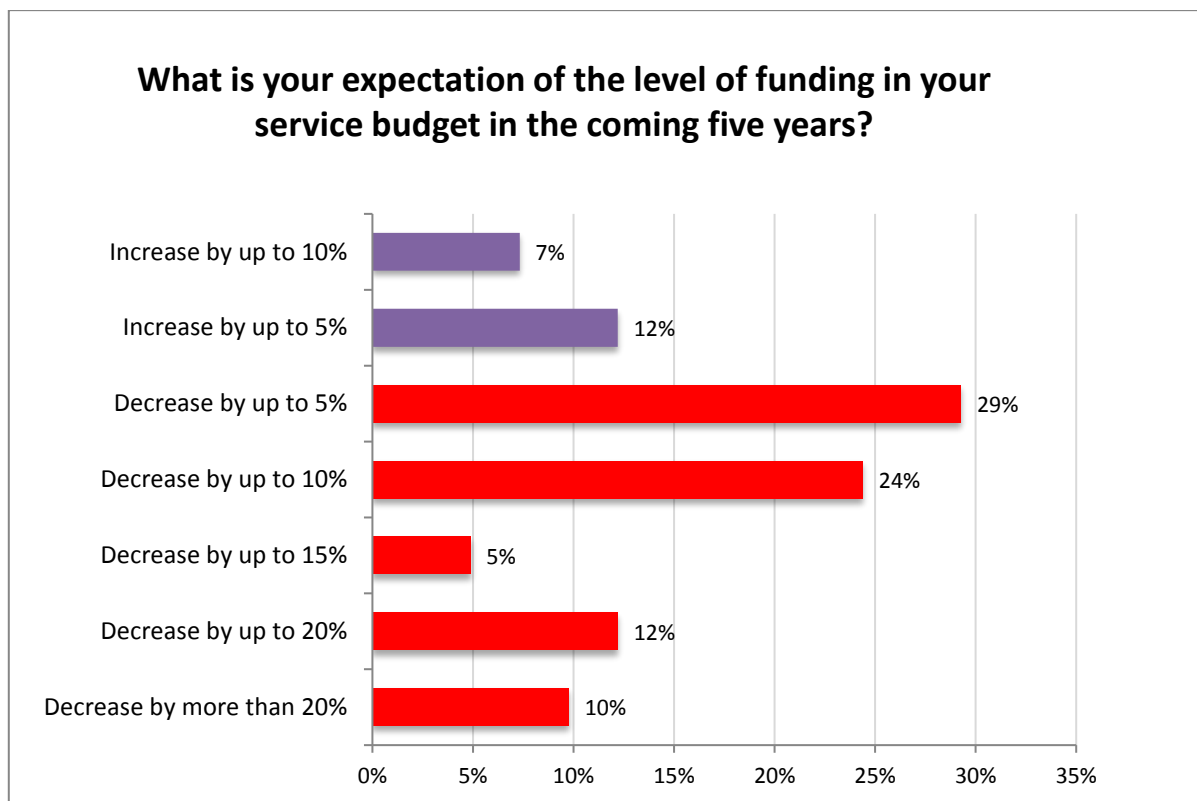
State of the Market 2018

APSE conducted an on-line survey during December 2017. This follows on from the 2009, 2011, 2012, 2014, 2015, 2016 and the 2017 Street Cleansing State of the Market surveys where similar questions were asked to allow for trend comparisons. 47 local authority responses were received from councils throughout the UK providing a good sample size for the survey. This report identifies the key findings of the survey.

Results from the survey

a) Service Budgets

Members were asked if they thought that the street cleansing budget will change over the next year and 67% said yes (compared with 57.5% in 2016). Of these, 80% expect budgets to **decrease** over the next five years. However, when compared to 2017 results, there has been a noticeable reduction in the number of authorities who were expecting cuts (93% in 2017). However, perhaps of some concern is that 22% of those expecting budget reductions, have stated the level of cuts will be up to 20% (18% in 2017). Most authorities (53%) are now expecting budget cuts of 5-10% over the next 5 years but 12% could see decreases up to 20% and alarmingly 10% expect decreases in budget of over 20% .



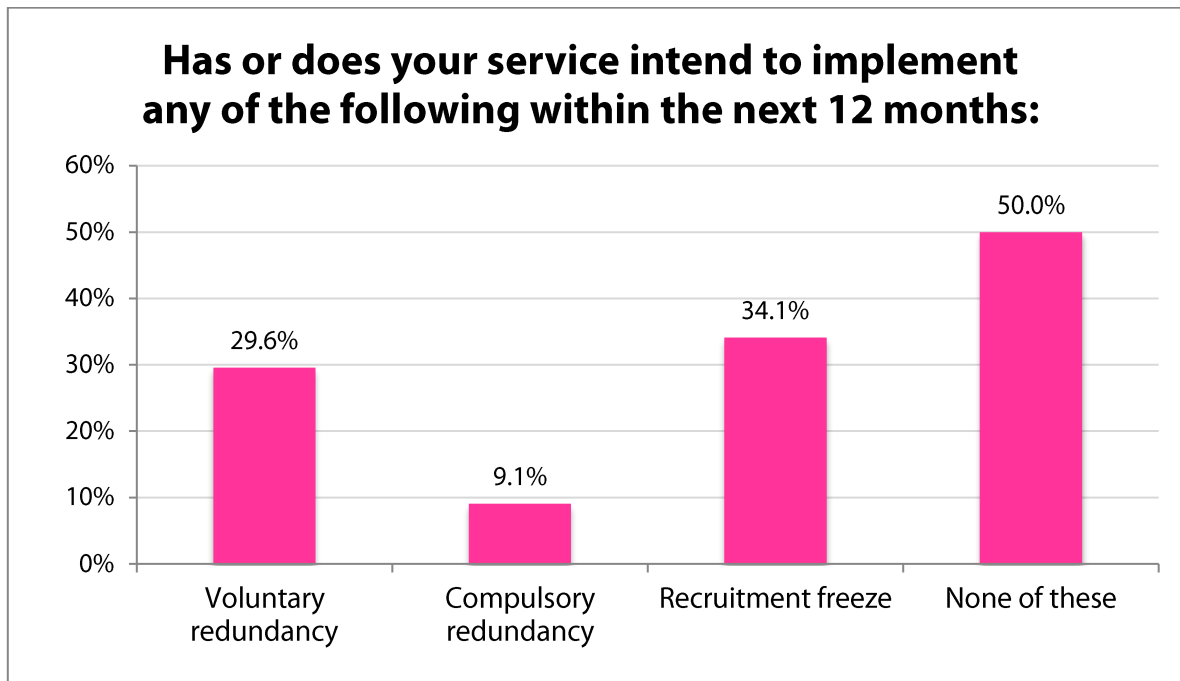
The survey asked 'What efficiencies are you currently working towards or proposing' and the main responses to this question were as follows:

- Better use of technology to maximise efficiency
- Depot rationalisation
- Reductions in overtime/ changes to working patterns
- Increased levels of mechanised sweeping
- Reducing lone workers in favour of team working thereby reducing individual equipment needs
- Use of smart litter bins reducing emptying frequencies
- Route optimisation
- Double shifting of vehicles and reducing residential sweeping frequencies
- Increased use of volunteers to adopt local area cleaning
- Replacing cleaning visits to certain areas by carrying out 'deep cleans', twice per year instead.
- Better joint working between street cleansing and refuse collection teams
- Joint authority working
- ICT investment
- 7 day working has reduced overtime costs

The survey asked 'Do you have any income generation schemes' and 55% answered 'yes', which is a significant increase on 2017 when 45% stated they had income generation schemes. For those that answered yes, they indicated using the following ways of implementing their income generation strategy:

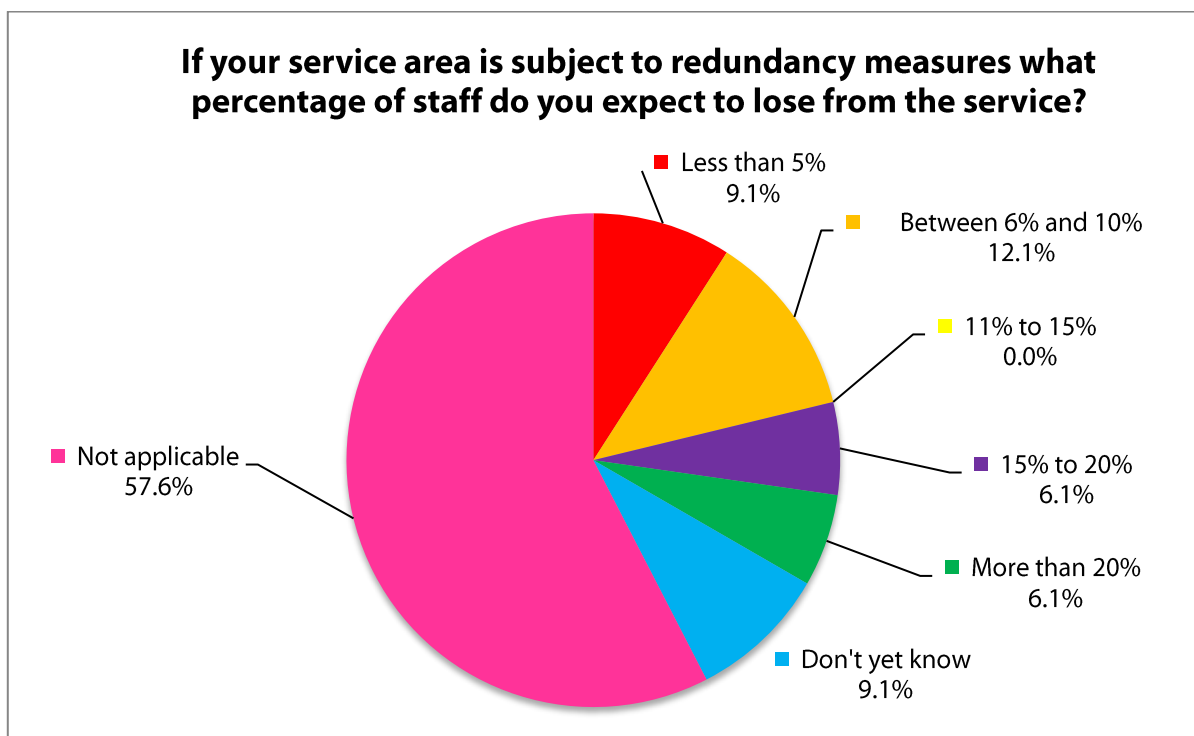
- Bulky waste disposal
- Cleaning of private car parks
- Delivering services for town/parish councils (e.g. dog/litter bins, cleansing)
- Weed spraying/weed killing for highways authority
- Gully emptying contracts
- Mechanical sweeping of cemeteries, parks and industrial estates, etc. for public/private clients
- Jet washing services to clear graffiti/clean surfaces for private sector clients
- Clean-up charging after events (rather than footing the bill themselves)
- Housing garden care, fencing and clean ups
- Advertising on litter bins
- Clearance of fly-tipping on private land.

On employment related matters, the survey asked 'has or does your service intend to implement any of the following within the next 12 months and the responses were as follows:



The most noticeable change has been the decrease in the number of respondents who have stated compulsory redundancy will be pursued. This has fallen to just over 9% as compared to 14.9% in 2017.

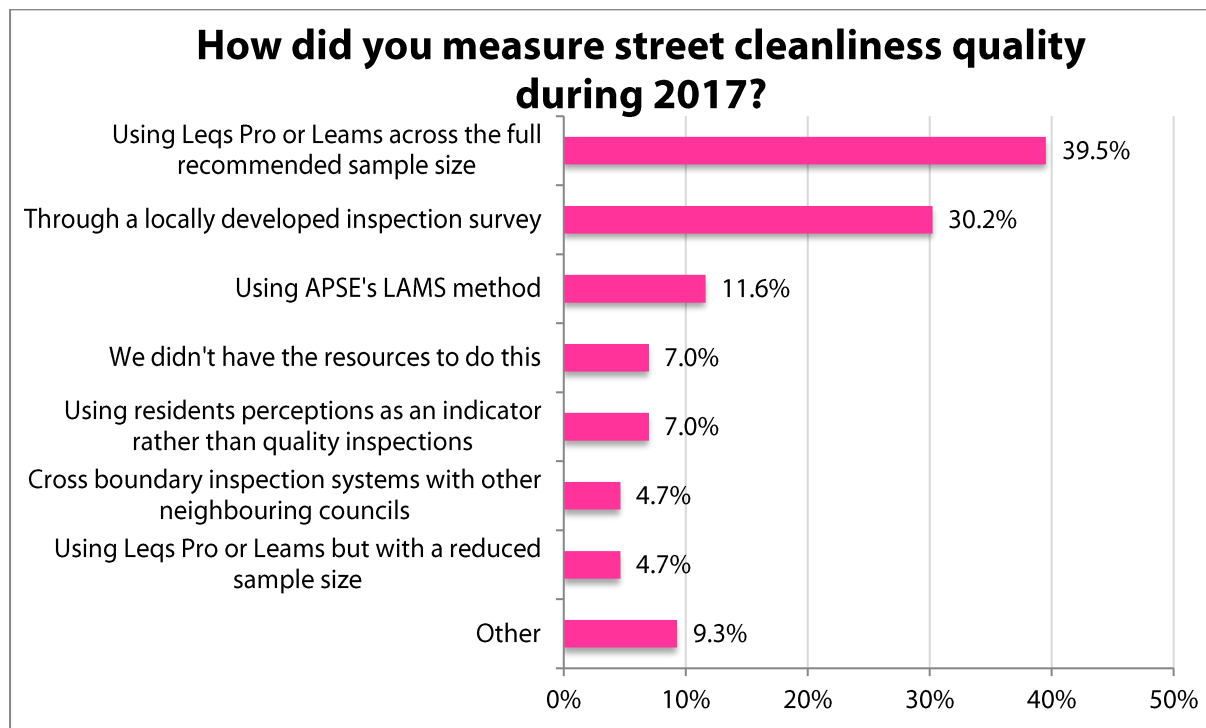
Of those services who expect to be subject to redundancy measures, they expect to lose the following percentage of staff from the service:



b) Standards of cleanliness

When asked how cleanliness levels had changed over the current year, 43% said they had stayed the same as compared to 71.1% in 2017 with 29% saying they had improved compared to 4.4% in 2017; however 29% said cleanliness levels had fallen compared to 24% in 2017. The most noticeable change in this measure has been the view of 29% of respondents that cleanliness levels have improved. Some respondents have attributed this improvement to efficiencies through the reviewing of rotas and reprioritisation of work based on cleanliness surveys. This means resources are arguably better directed though the notable numbers reporting a decline in standards of cleanliness and further evidence the on-going budget pressures.

The survey asked how street cleanliness quality was measured (respondents were allowed to choose more than one response) and the results were as follows:



When asked who carried out the surveys, the majority of respondents indicated that this was done by council officers mainly from within their own service. A small proportion use officers from another authority or stated volunteers were involved in measuring cleanliness levels.

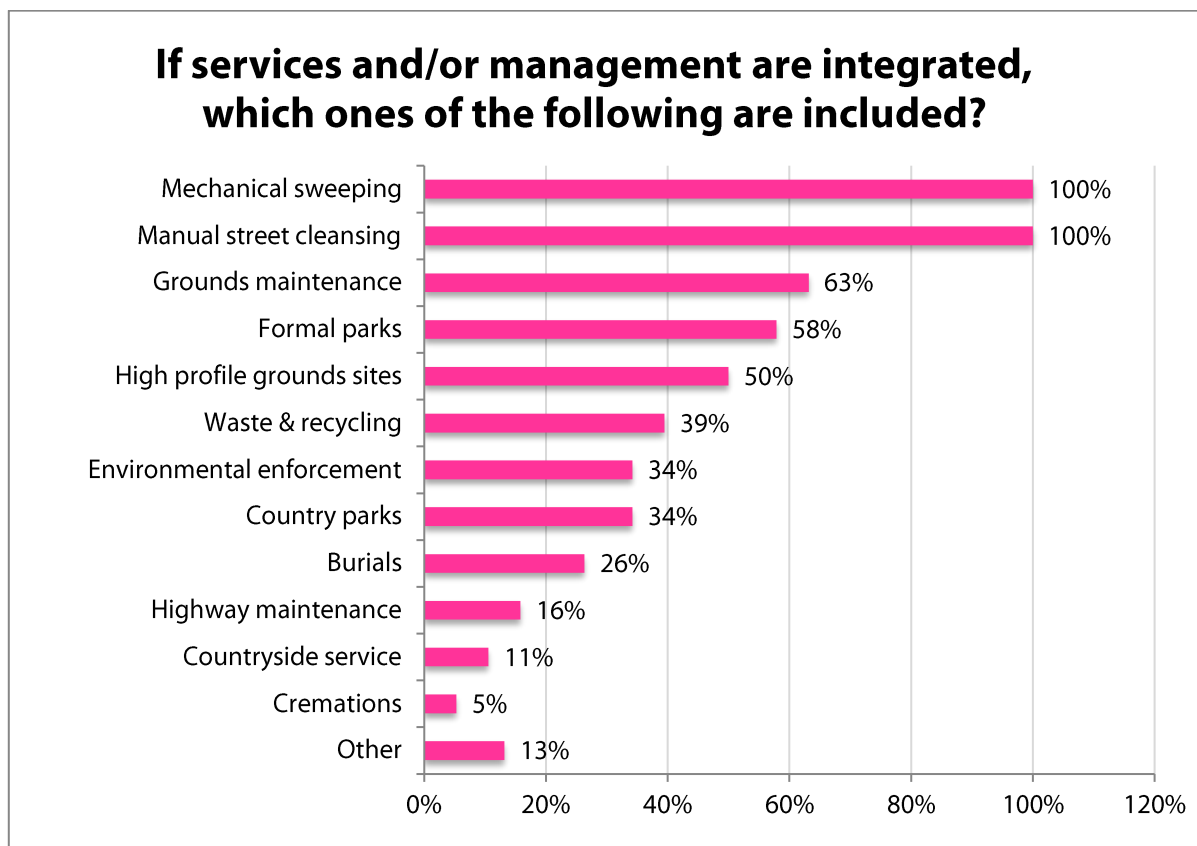
The same questions were asked about how councils measured street cleanliness quality during 2017. 40% stated that they would be using a locally developed inspection survey as opposed to 46.7% in 2017. Others included LEQS PRO or LEAMS, residents' perception surveys. Noticeably the number of local authorities using [APSE's Land Audit Management System](#) has doubled. The LAMS monitoring system, allows the simple measurement of grounds maintenance quality standards for parks, open space and horticultural services.

This system provides a less complex and more affordable way to measure street cleansing quality. The LAMS system has proven to be extremely popular and has now been adapted to include cemeteries and crematoria as well as allowing for the use of volunteer groups to assist in data collection. The LAMS system has also been referenced by DEFRA in its' national litter strategy and a digital App to allow LAMS to be used more easily is also being made available in partnership with Bbits/Love Clean Streets and will be launched in May 2018.

C) Street scene

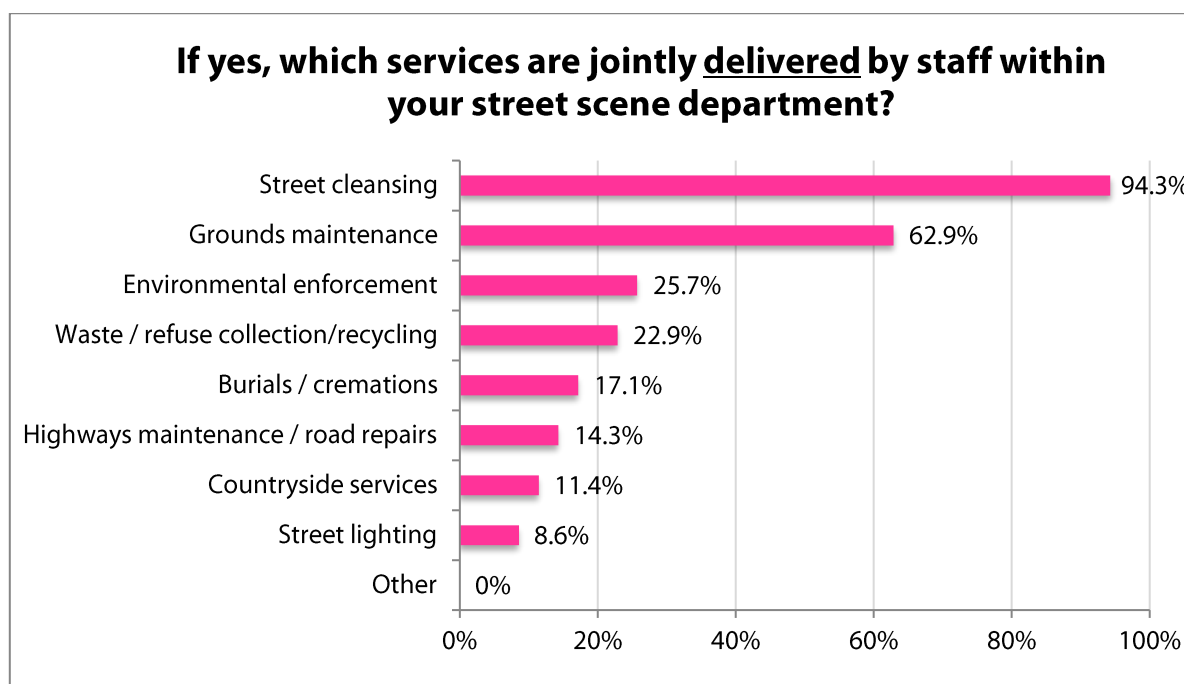
80% of respondents indicated that they are part of an integrated street scene service as compared to 65% in 2017, however the level of integration varies widely, ranging from full service integration to simply supervisors monitoring the workforce across a number of different services.

Of those who replied stating that services are jointly managed the level of integration according to service type shown in the graph below.



The most noticeable changes in services included in street scene since 2017, is that the inclusion of cremation services has fallen from 14% in 2017 to 5% in 2018, perhaps suggesting because of the nature of the service it is not as easy to include in an integrated approach.

Respondents also indicated that the following services are **jointly delivered** by staff within their street scene department as distinct from service level integration in the above chart. The outcomes on joint delivery are as follows:-



Two areas where there has been significant falls in being jointly delivered by staff are waste/refuse collection/recycling which has again fallen from 48.4% in 2016, 36.7% in 2017 to 22.9% in this latest survey. It is clear there is a good deal of synergy between street and greenspace activities where staff may be more easily moved around than in the more rigid staffing requirements of waste collection.

Of those who stated that they were not already part of an integrated street scene service, 40% expected to become part of an integrated street scene service in the near future, this is a significant fall from 2017 when 85% stated they expected to be part of an integrated street scene service in the future. This is partially explained by the increase in numbers who are actually now part of an integrated streetscene service since the last survey.

d) Street cleansing operations

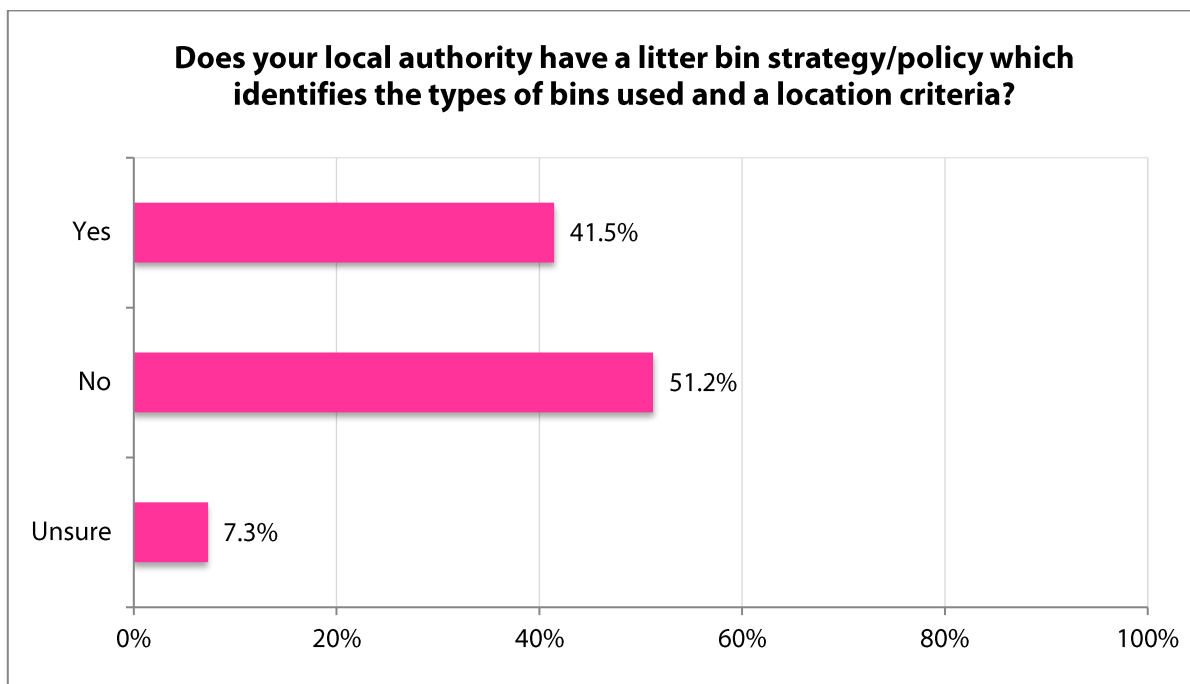
81%% stated that they have area-based teams (76% in 2017) and 98% of respondents stated their services operate over 7 days (83% in 2017), with only 2% operating over 5 days (7.1% in 2017). 29% currently undertake night-time street cleansing as opposed to 14% in 2017.

The survey asked how the street cleansing service is currently managed and 88% stated that this is in-house (81.4% in 2017), and 12% external (16.3% in 2017). 88% expect to be managed in-house within the next 2-3 years (74.4% in 2017). For those where the service is currently managed externally, 60% of respondents stated that the contract length is mainly up to 5 years (29% in 2017), whilst a further 40% of respondents stated that their contracts were over 10 years. 50% of respondents indicated that there is an option to extend the contract.

e) 'Binrastructure'

APSE has been working with the Department for Environment, Food and Rural Affairs (DEFRA) and the Department for Communities and Local Government (DCLG) on a National Litter Strategy for England. As part of this work we have been tasked with discovering how local authorities address the issue of litter bin provision, recording locations, typology of bins and initiatives to promote greater use.

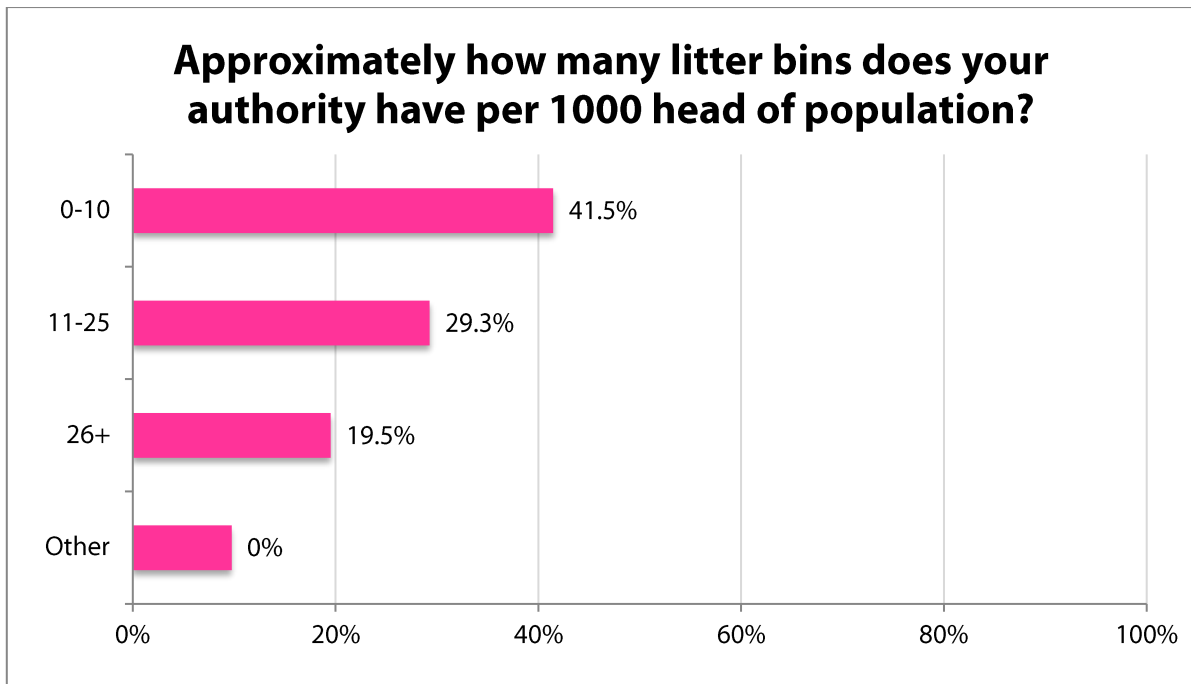
Therefore for this year we have included several questions which will help this process. It may be that members would wish to see these questions included in future State of the Market reports.



It is clear that (41.5%) of respondents do have some form of litter bin strategy/policy, although even here, many say that not all litter bin providers in their area subscribe to it, leading to confusion regarding litter bin styles, emptying techniques, locations and responsibility for emptying. It is hoped that the work undertaken by APSE towards guidance on litter bins will prove useful to those authorities which have still to set out a policy.

The question was posed as to whether a single department is responsible for providing litter bins. 76% responded that a single department was responsible for litter bin provision.

The number of litter bins provided by a local authority is often a question which is asked by members to get a view as to whether they provide sufficient coverage.



The graph shows at 41.5% the provision of 0-10 litter bins per 1000 head of population seems to be the most common level of provision.

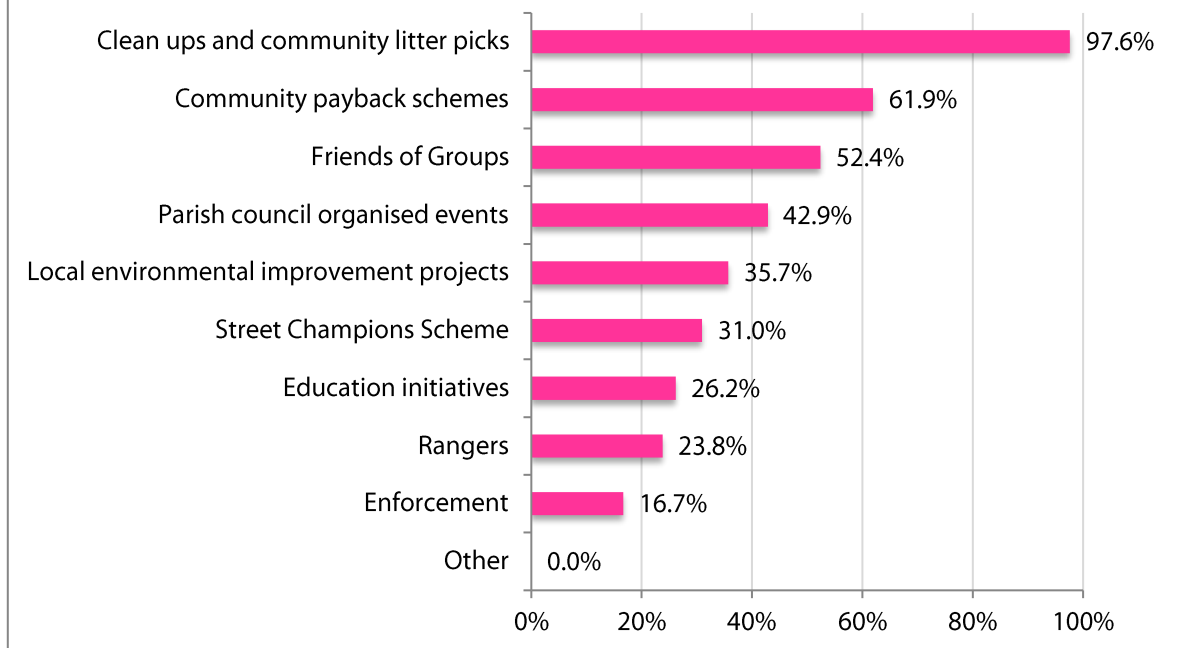
Regarding the accurate mapping of litter bin assets, only 69% of respondents had an accurate map of where their litter bin stock was located. This means that they may have problems with ensuring regular emptying, repair and maintenance and also whether litter bins are even needed in their current location. Most of those local authorities which did have accurate litter bin locations used GIS systems to record their locations.

The final question in this section asked what proportion of litter bins were replaced annually. The most frequent response at 81%, stated that up to 5% of bins were replaced annually

f) Volunteering and partnership working.

When asked how volunteers are involved in the service, the majority of respondents said this was through clean ups and community litter picks, community payback schemes and Friends of Groups. The full breakdown is shown in the following graph below.

How are volunteers involved in the street cleansing service?



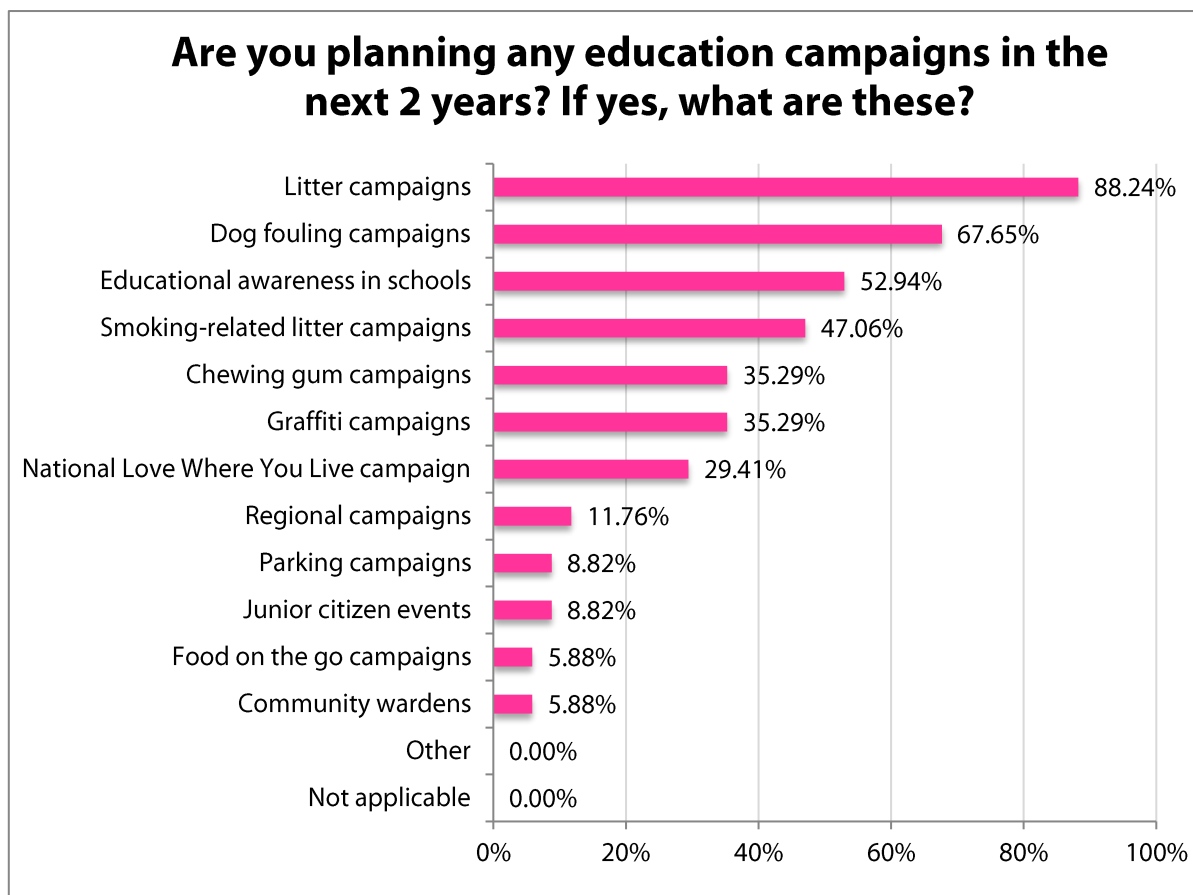
When questioned about working with partners to provide street scene services, 22% stated that they provide street scene services as part of a Business Improvement District (BID) as compared to 34.2% in 2017. We found that 10% of respondents have Individual street cleansing agreements with supermarkets, retailers and other businesses (18% in 2017). Surprisingly, no respondents indicated that they have a partnership with large supermarkets/retailers/businesses on community clear-ups/public realm improvements such as Community Champions schemes with organisations like ASDA, Tesco and McDonalds, This latest figure shows a significant fall since 2016 when the figure stood at 26.3%. However, many have now taken the approach of supporting local authorities on specific events rather than all-year-round support.

In 2016, 67.5% respondents stated that community sector involvement in street cleansing was increasing in their service. However, in 2017 this support had fallen to 50%. Therefore the returns for this year at 67% appear to be a welcome improvement albeit the fluctuation in figures suggest the need for constant support to maintain volunteering levels.

The main areas where respondents identified external support were in relation to clean ups and community litter picks (97%), Friends of Groups (52%), local environmental improvement projects (35%), community payback schemes (61%), education initiatives (26%) and parish council organised events (42%)

In terms of education campaigns, 83% are planning these in the next 2 years, which is an increase from 2017 when 76% were planning campaigns. The main campaigns being

planned are litter campaigns (88%), dog fouling campaigns (68%) and educational awareness in schools (53%). The full breakdown is as follows:



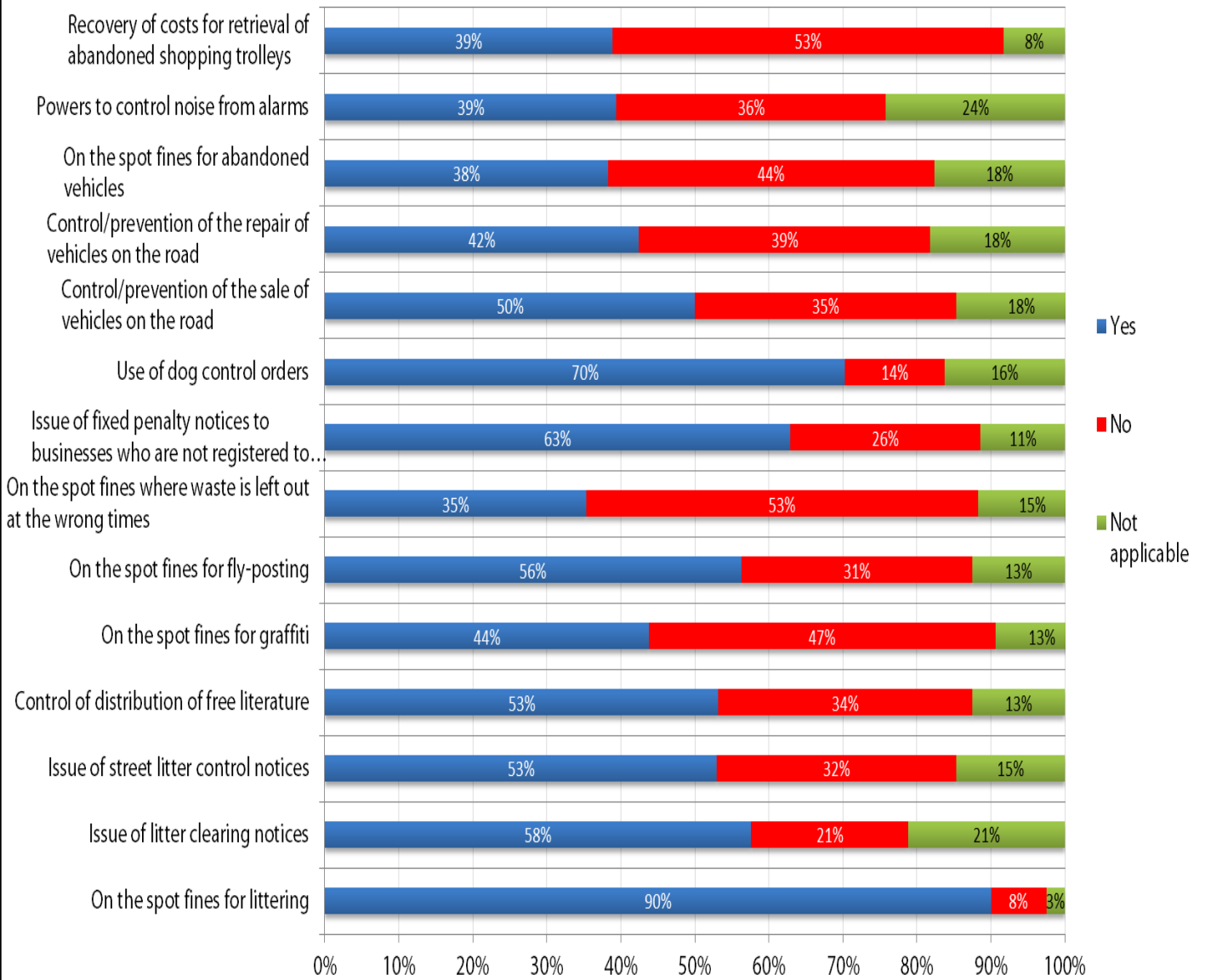
Other educational initiatives included: fly-tipping campaigns, litter thrown from cars and business engagement.

g) Enforcement

Near to 76% of respondents thought that there will be an increase in enforcement/notices issued in the next 2-3 years, which is a significant rise from the previous figure of 62.5% who felt enforcement notice issuing would increase.

The survey asked which of the following powers were being used currently (where applicable), the results are shown overleaf. These are the powers defined by the Clean Neighbourhoods and Environment Acts for England, Wales and Northern Ireland and the Anti-Social Behaviour, Crime and Policing Act 2014 (respondents were asked to tick 'not applicable' where the powers do not apply) and Councils in Scotland only answered these where they were relevant.

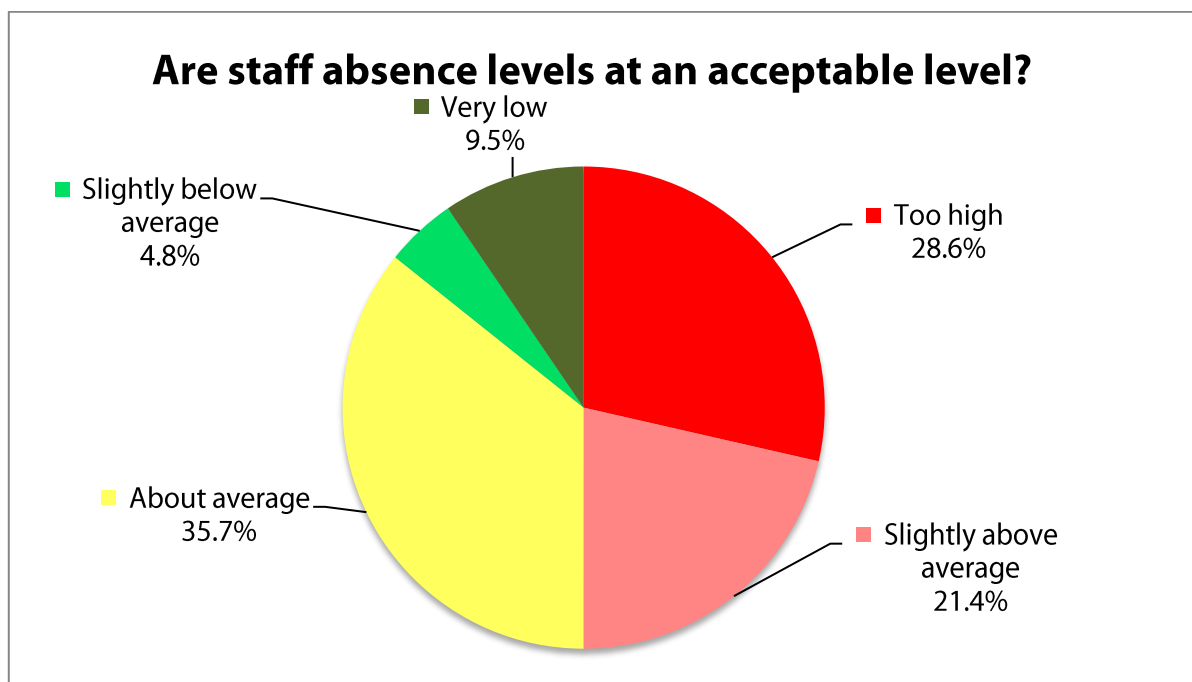
Which of the following powers are you currently using (where applicable)?



A further question was asked about why certain powers have not been used (where respondents answered 'no'. Reasons cited included, 'insufficient resources' (41% as opposed to 67.9% in 2017), 'it is covered by other agencies/departments' (32% as opposed to 17.9% in 2017) 'they're not problem areas/we have other priorities' (54% as opposed to 35.71% in 2017) and 'political reasons' (29% as opposed to 14.29% in 2017).

h) Staff absence

In terms of staff absence 28.6% thought that staff absence was too high but 35.7% of respondents viewed staff absence as being around average levels.



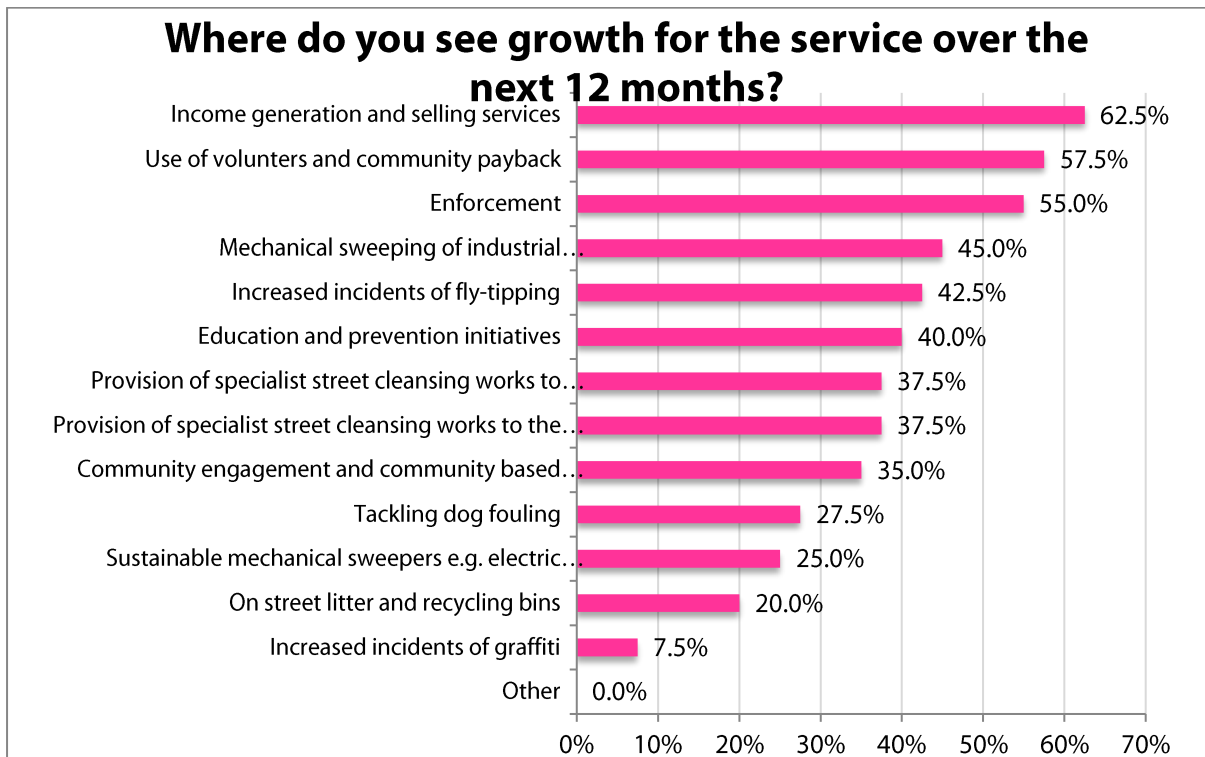
Staff absence levels from performance networks data appears to show that staff absence is well managed, however the survey data indicates that over a quarter of local managers believe absence is still too high. Perceptions of absence may therefore be outweighing the underlying data on absence.

17% of respondents thought that the training budget is going to increase over the next 12 months (8.3% in 2017), with 5% stating a decrease (25% in 2017) and 78% stating that this will stay the same. This is a welcome improvement on last year's results, perhaps a recognition that staff will need to be multi-skilled as more services consider integration, therefore staff training will be essential to ensure service quality is met.

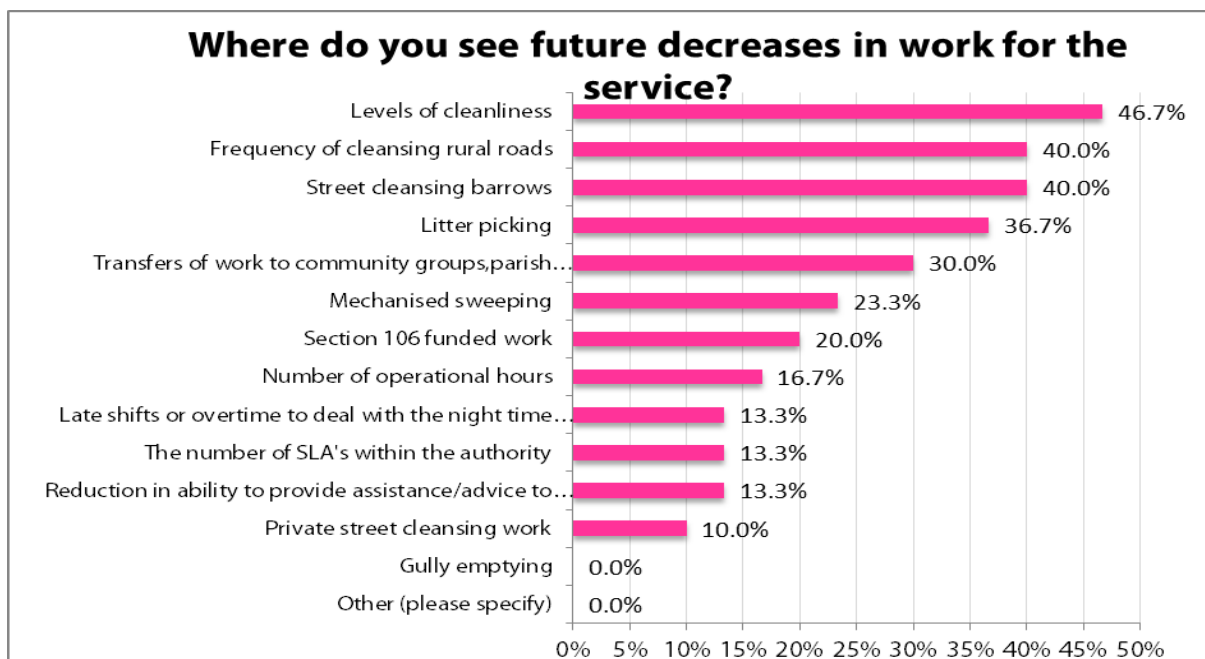
i) Future areas of work and service reviews

54.6% of respondents currently have income generation schemes in place, this is an increase on 2017 when 44.8% had such schemes in place. This shows a growing trend towards services seeking income from other sources to offset budget cuts.

Respondents were asked where they expect to see growth over the next 12 months and where there may be future decreases in work for the service and the responses for both questions were as follows:

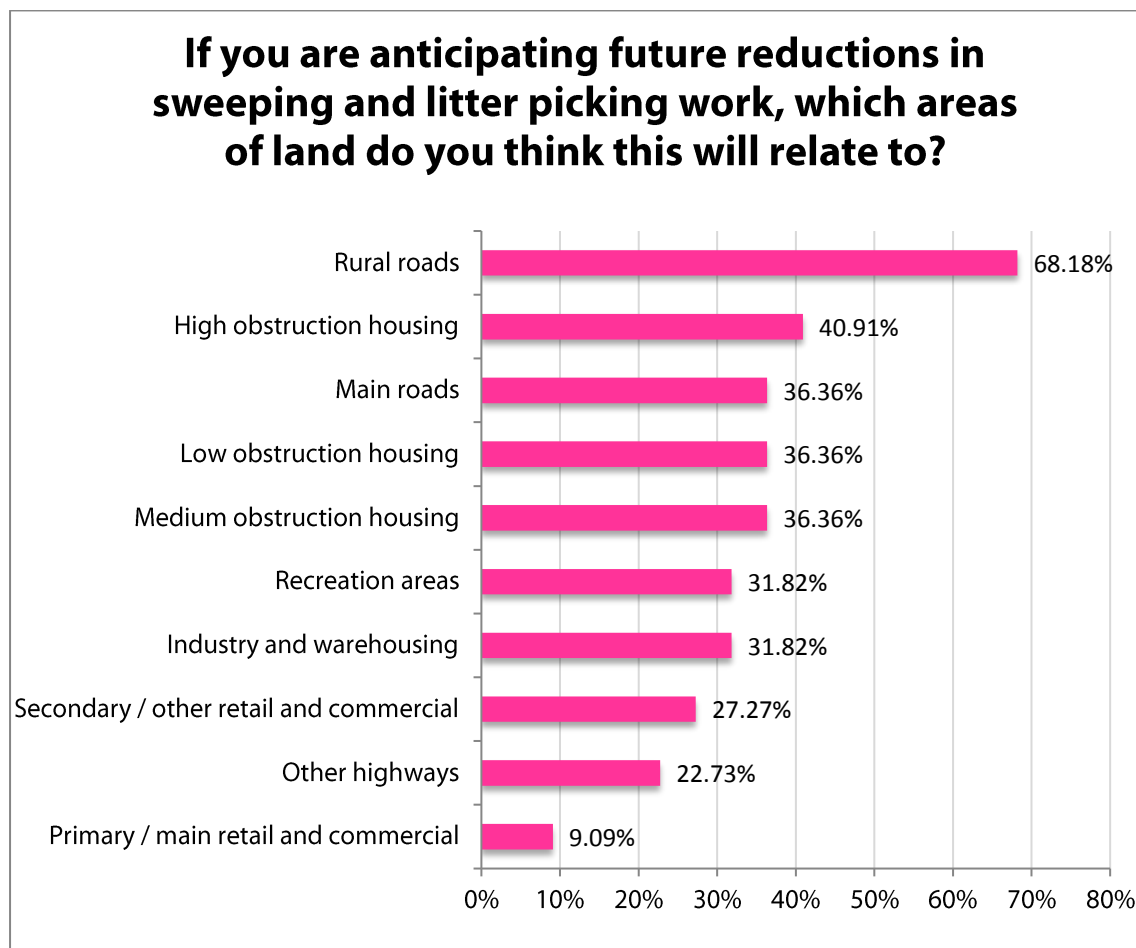


Results are very much as 2017, with very little change. However there have been noticeable increases in prevention and education initiatives and sustainable electric vehicles, and income generation is still a key priority.



Interestingly the previous expectation that there would be a reduction in street cleansing frequencies and an anticipated declines in street cleanliness seem to have been somewhat diluted with less respondents anticipating declines in these work areas.

The survey asked 'if you are anticipating future reductions in sweeping and litter picking work, which areas of land do you think this will relate to' and the results were as follows:

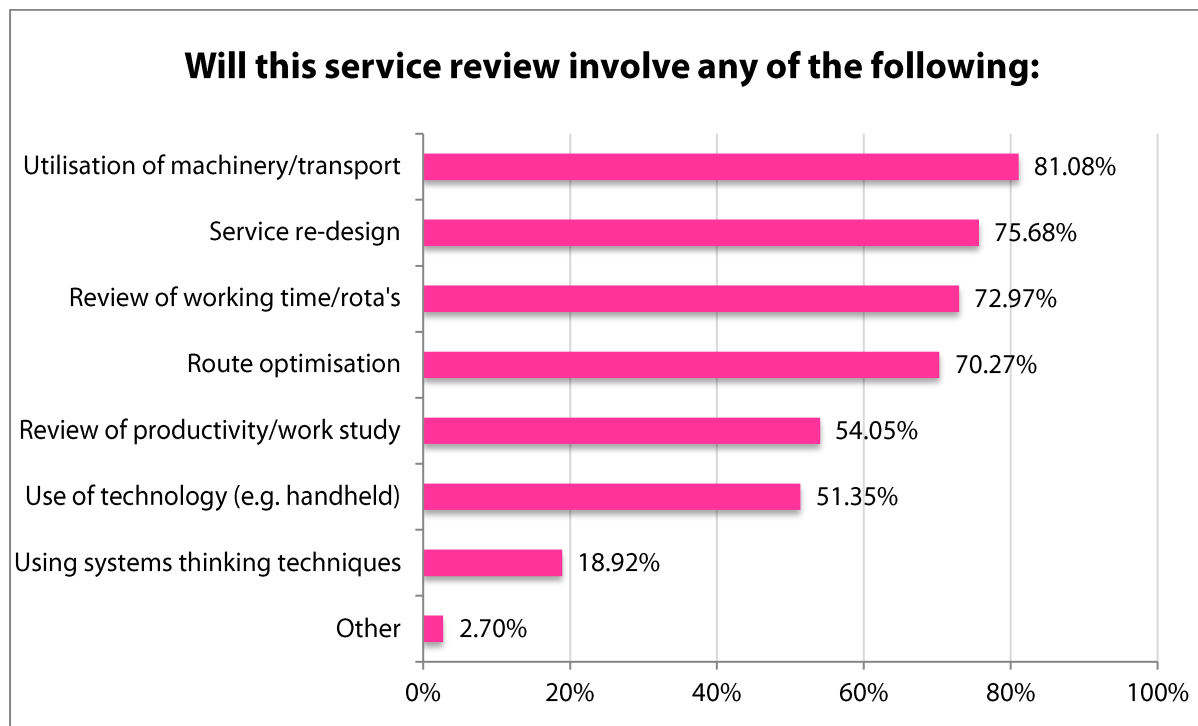


It is not surprising that rural roads and housing areas are those aspects will be the main losers in relation to reducing frequencies but this is nevertheless a worrying development as litter on rural roads is a common cause of complaints and in terms of housing areas litter has a significant impact on the public realm quality in areas that may already have quality of life issues. Recreation areas are also seeing reduced frequencies of cleansing. These areas have increased in the likelihood of reduced cleaning when compared to 2017 figures.

j) Service Reviews

When asked if respondents had undertaken a service review recently, 29% stated that they had completed this (34.3% in 2017), 38% stated that they have a review which is underway (31.4% in 2017) and 29% stated that they will be doing so in the next 1-2 years (22.9% in 2017). Only 4% said 'no' and they won't be undertaking a review in the next 1-2 years (11.4% in 2017).

The clear emphasis on undertaking service reviews reflects the efficiency drive in local government and the need to review services to try and meet these challenges. Respondents stated that the 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 good street cleansing services. However, there is a real risk that service quality will diminish as a result of the ongoing pressures on budgets, changes to cleansing 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, but there is a growing need to recognise the value of these public realm services to local economies.

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 street scene environment 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 businesses, as well as local residents

It is critical that service resources are targeted more effectively in those areas where cleansing demands are highest. From the results received there does appear to be a greater level of optimism that closer monitoring of cleanliness levels with more targeted resource input will help stave off some of the worst excesses of funding cuts.

Route optimisation and service re-design are now being used across most services to try to dilute the impact of shrinking resources, but ultimately, the on-going demand on the limited resources of local authorities needs to be addressed at governmental level. Whilst behaviour change campaigns encouraging the public to be more proactive in preventing and clearing litter have a place, and ongoing work with businesses to minimise litter from their products is of course welcome, there will be no doubt a tipping point at which cleanliness standards significantly fall below that expected by the public and local councillors. It is also apparent that whilst the use of volunteers is significant 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. Volunteers will only ever be a 'top-up' to not a 'replacement for' local authority services. These issues were explored in APSE's research ['Park Life: Street Life: Managing demand in the public realm' which can be downloaded using the link free of charge from the APSE website.](#)

Despite some negative aspects contained within this report, these are far outweighed by the positive and innovative work local authorities are continuing to deliver in their desire to create cleaner, greener and safer local environments

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 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: Local authority trading, charging and income generation
- Housing, construction and building maintenance
- 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
- Cemeteries and crematoria
- Environmental Health

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