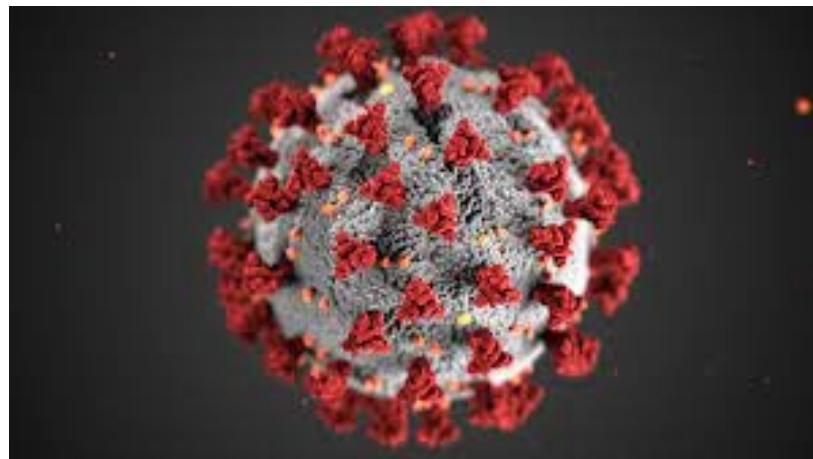




State of the Market 2021

**Mo Baines, Head of Communication and
Coordination, APSE**

Context

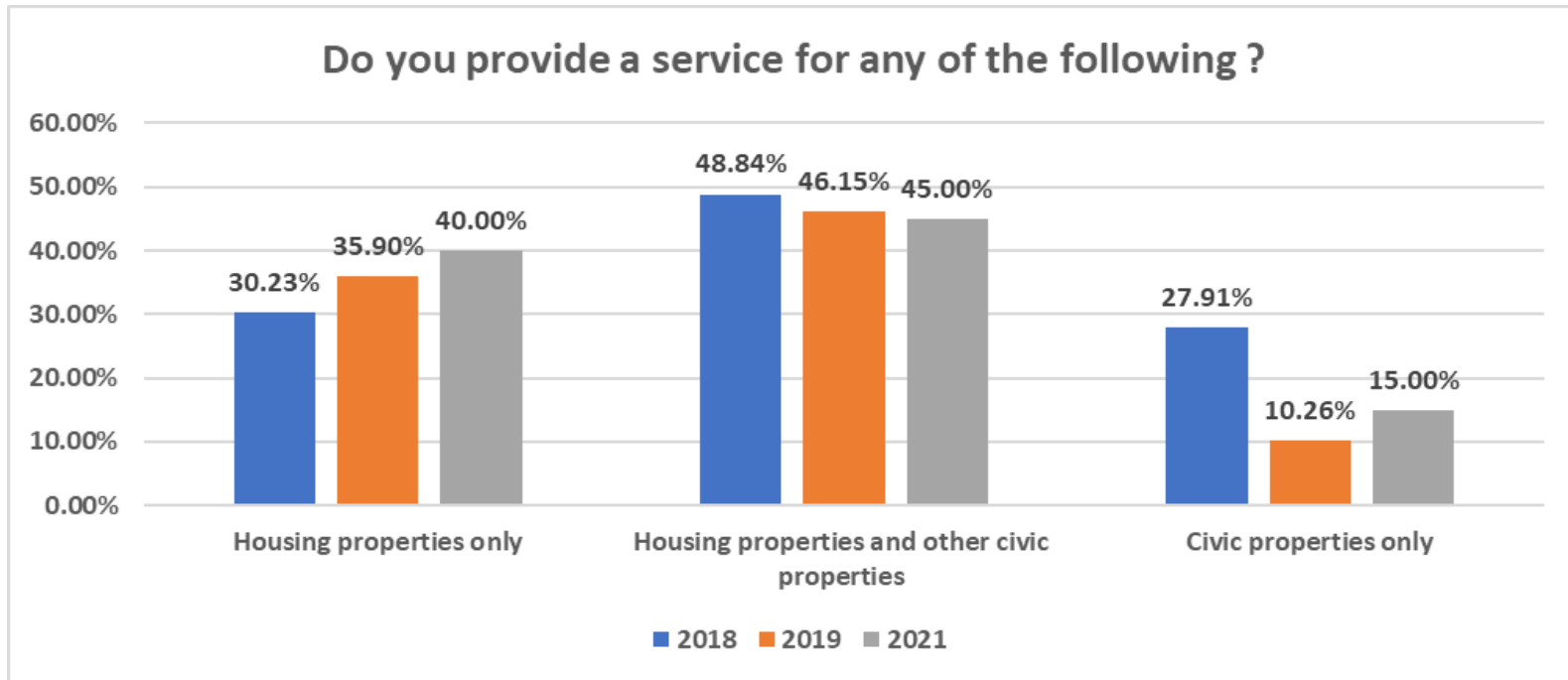




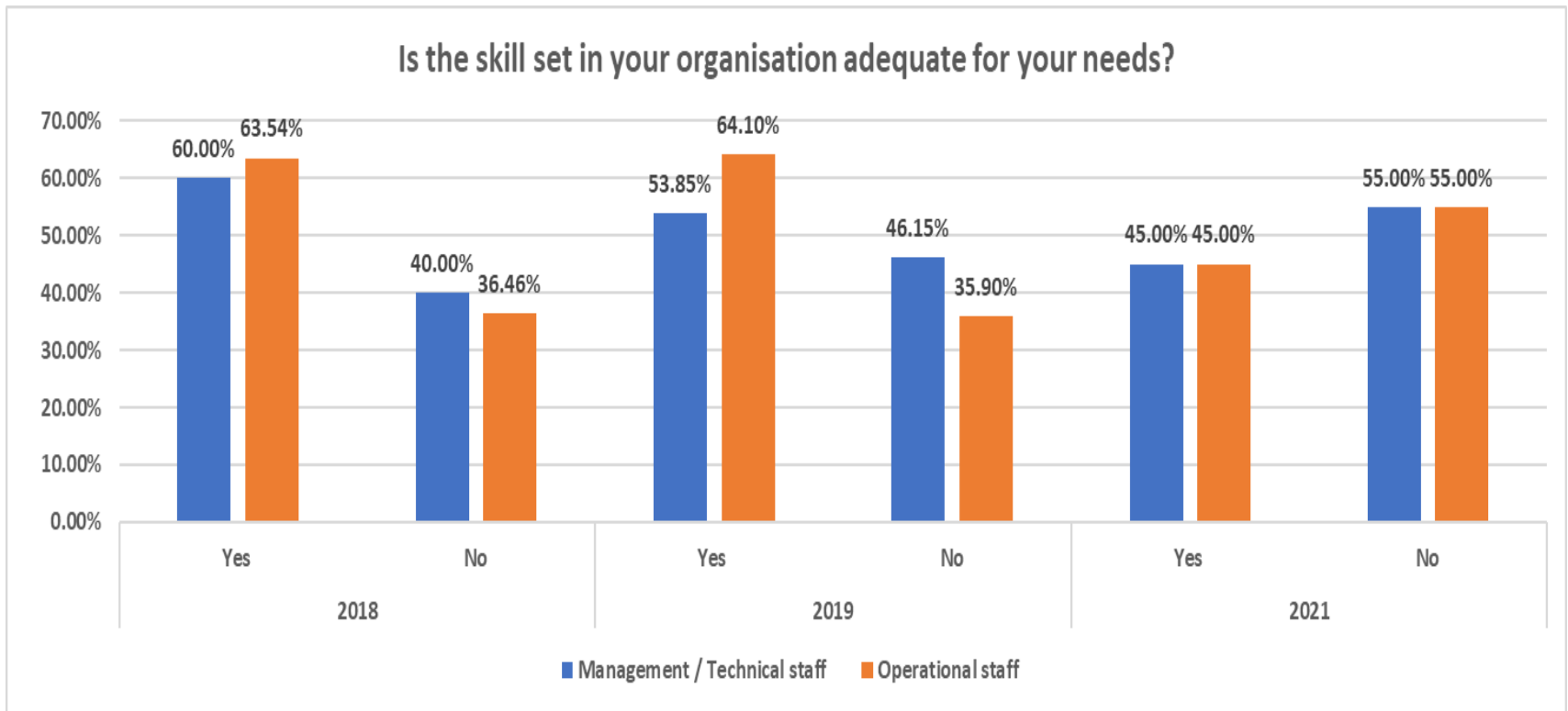
State of the market

APSE's findings

Scope of the service



Skillset



Apprenticeships

65% of respondents overall have apprenticeship schemes

35% say that they will establish one in the next 2-3 years

Answer options	Responses		
	2021	2019	2018
Less than 5	0%	8.33%	21.95%
5 to 9	10.53%	22.22%	17.07%
10 to 14	5.26%	8.33%	17.07%
15 to 19	10.53%	16.67%	12.20%
20 or more	42.11%	30.56%	17.07%
Not applicable	31.58%	16.67%	14.63%

Non-housing

21.4% report an increase in workload
Reasons?

New build work
 Capital works
 Refurbishments and retrofitting

Is this a trend with councils using the COVID emergency to take stock and refit when assets are out of use anyway?

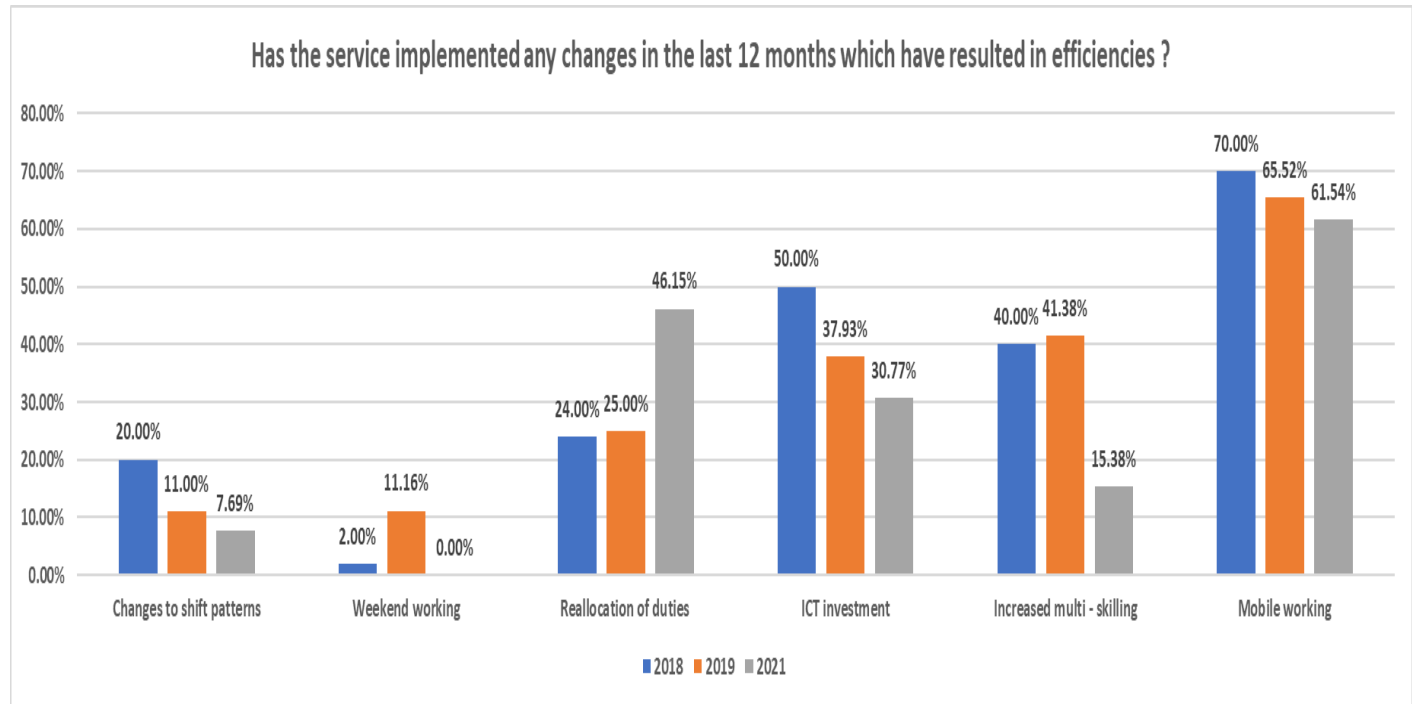
Answer Options	2021 Non-housing %	2019 non-housing %	2018 Non-housing %	2016 Non-housing %
Increase significantly	30.77%	26.09%	3.23%	7.69%
Increase	38.46%	39.13%	41.94%	42.31%
Stay the same	15.38%	21.74%	19.35%	34.62%
Decrease	15.38%	13.04%	35.48%	15.38%
Decrease Significantly	0%	0%	0%	0%

Changes implemented

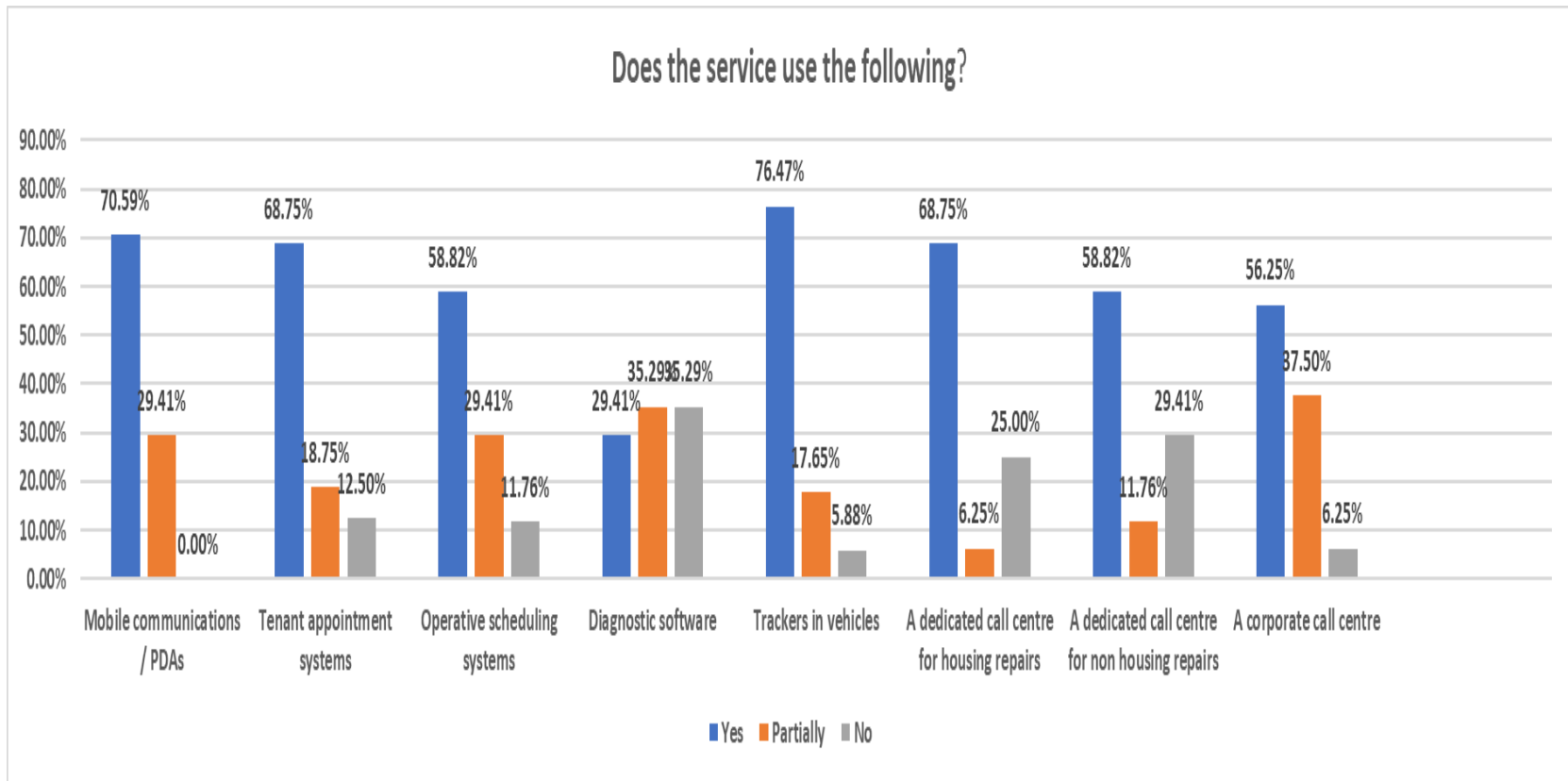
Mobile working?

Biggest increase in three years though lower in 2021.

Is this COVID related?
Remote management tools?



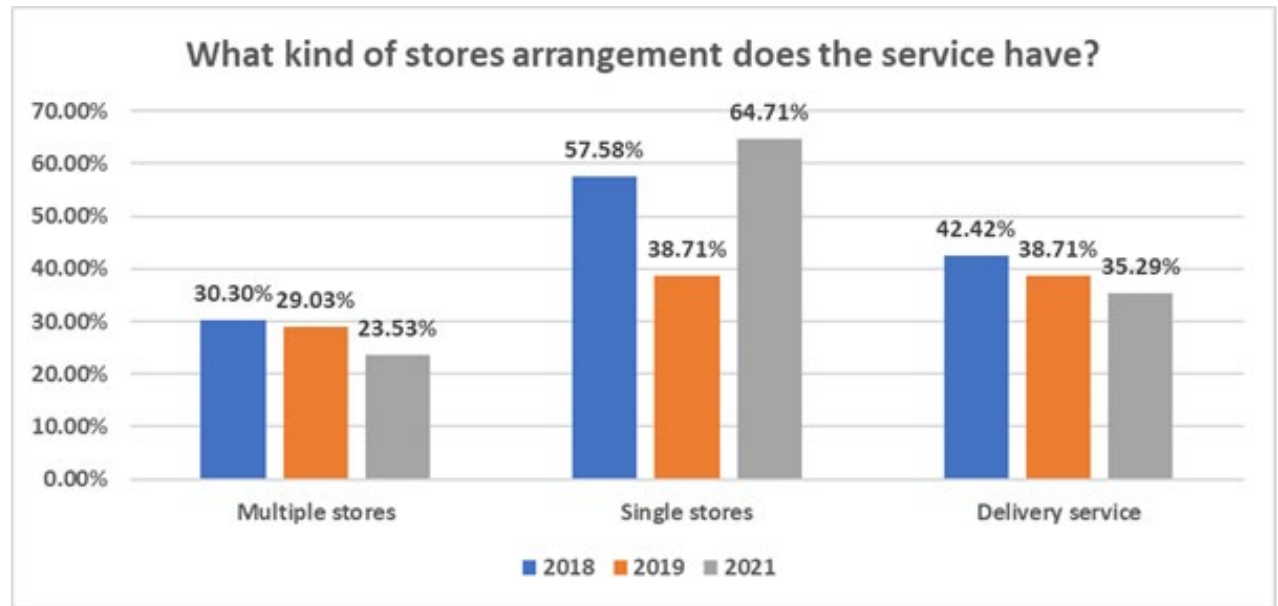
Systems implemented



Stores arrangements

What happens if we triangulate this data with APSE Performance Networks Data?

Average number of lines in stores increased from 2,200 in year 18 to 2,823 now – a response to material shortages?



Next 12 Months

Areas of Growth

- **57.14%** - repairs on new housing units through a Local Authority Housing Company
- **50%** - work from the insourced housing stock
- **50%** - growth in new contracts with housing providers
- **14.29%** - work undertaken for the private rented sector

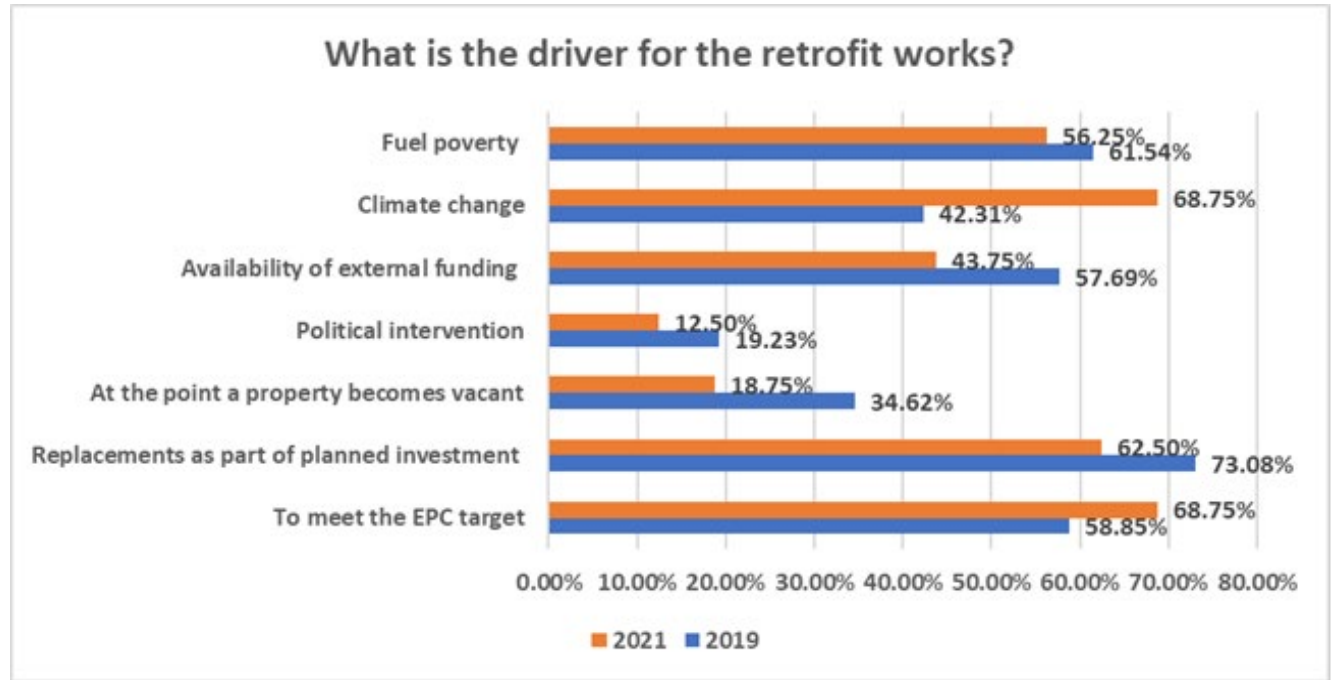
Areas of Decrease

- **80%** - decrease as a result of reducing budgets
- **20%** - a reduction in civic assets
- **6.67%** - tenant behaviour change
- **33.33%** - the reduction in stock

Drivers for Retrofit

Climate change now the biggest driver for retrofit works.

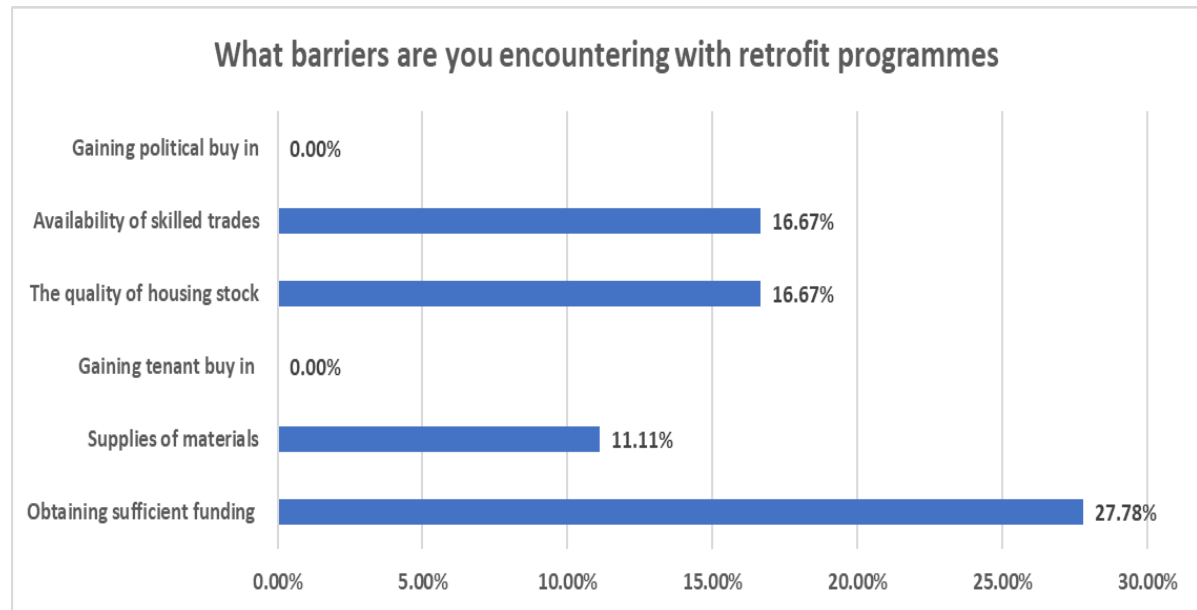
Does this mean the sector is now being taken seriously on its climate role?



Barriers for Retrofit

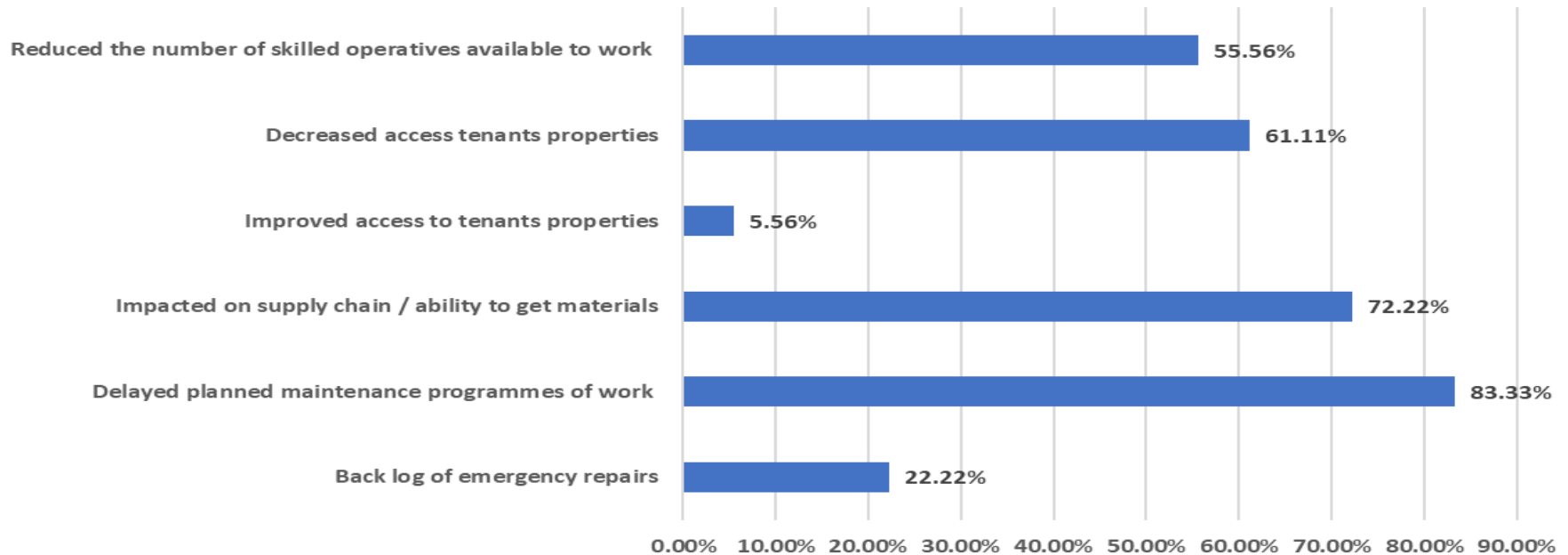
Funding!

What a surprise.....!



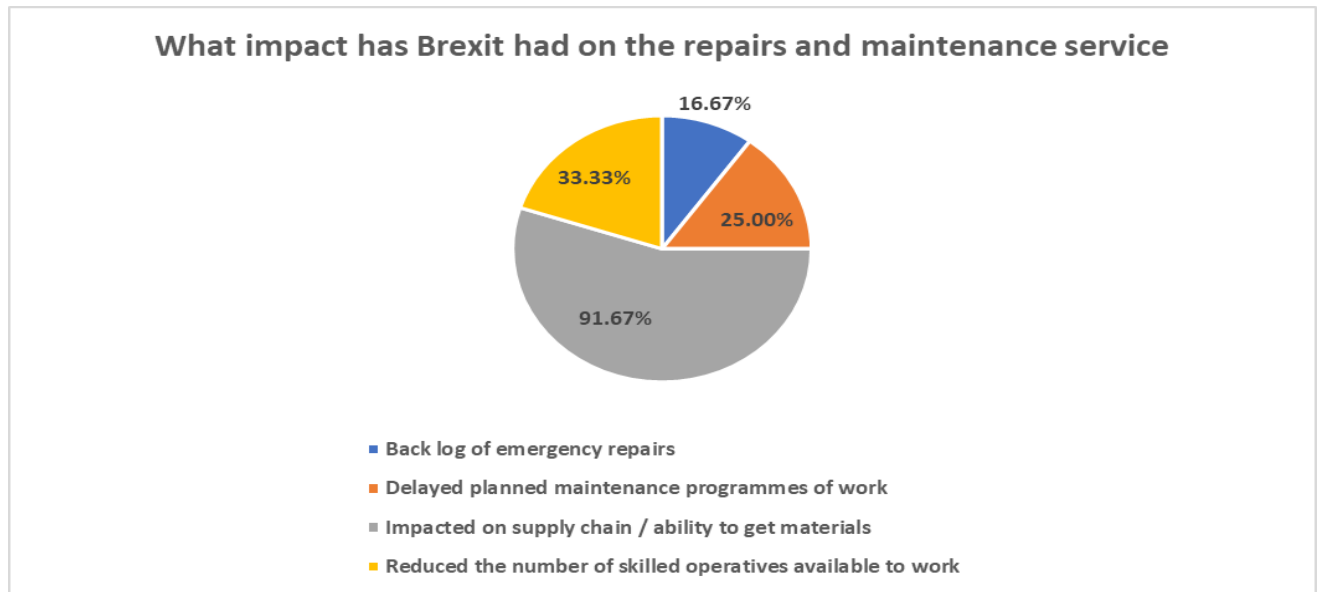
COVID-19 Impacts

What impact has COVID-19 had on the repairs and maintenance service



Brexit Impact

Material sources exacerbated





So where does this leave us in policy terms?

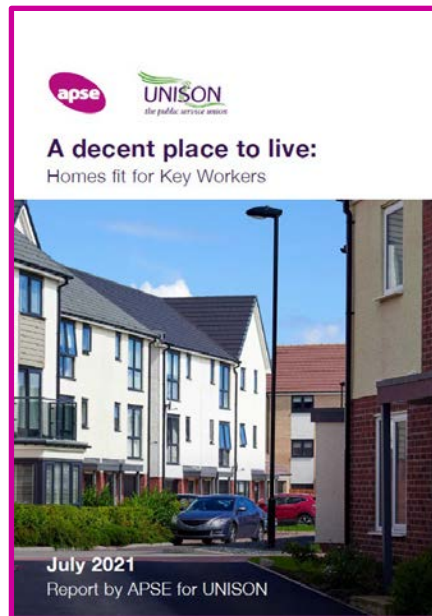




Planning for quality



Defining 'key workers' and affordable housing



Conclusions

- Perception of homes – working from home and housing quality
- Housing crisis further exposed by the COVID pandemic
- Planning in many areas of the UK is inadequate
- Skills shortages are now headline news!
- Investment in apprenticeships critical
- Growing our own? Brick production? Addressing the materials shortages
- Assets and estates – 40% of emissions so councils cannot address their climate promises without addressing housing and non-housing stock!

NEW MUNICIPALISM

Delivering for local people and local economies



Contact details

Mo Baines, Head of Communication and Coordination, APSE

Email: mbaines@apse.org.uk

[@apsenews](#)

Association for Public Service Excellence

3rd floor, Trafford House, Chester Road,
Old Trafford, Manchester M32 0RS.

telephone: 0161 772 1810

web: www.apse.org.uk



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