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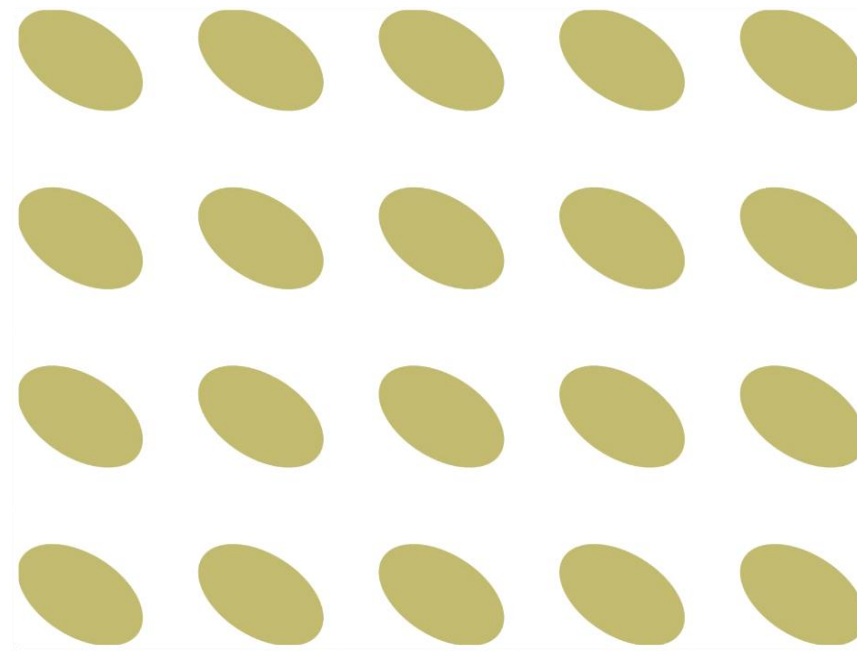
State of the Market - A 5 year Review



State of the Market Surveys

- State of the Market Survey now in its 13th Year
- Local authority service areas
- Similar questions are asked to allow for trend comparisons
- Identifies common problems, innovations and best practice
- Insight into the future direction of the service
- Open to all APSE member authorities across the UK
- Key findings of the survey are expressed as a briefing note
- Useful for benchmarking and performance management
- Used by National Government and in APSE research documents
- Used by National Litter Strategy, HLF, Parks Action Group, School Food Plan, Press and trade and national media to enhance knowledge of local government services.

State of the Market Survey 2023 Local Authority Street Cleansing Services



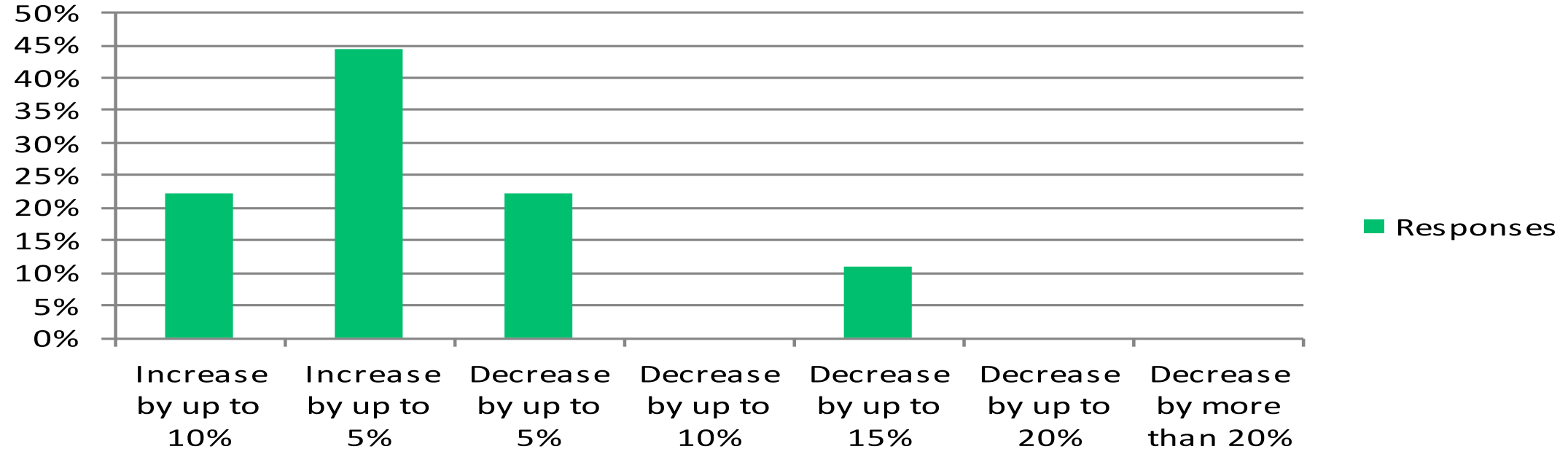
Areas of interest

- State of budgets/future funding
- Service efficiencies
- Income generation
- Staffing levels/absence levels
- Cleanliness standards
- Management/service structures
- Litter bin strategies
- Use of community volunteers
- Future initiatives
- Areas of service growth/decline
- Service reviews



Changing budgets

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

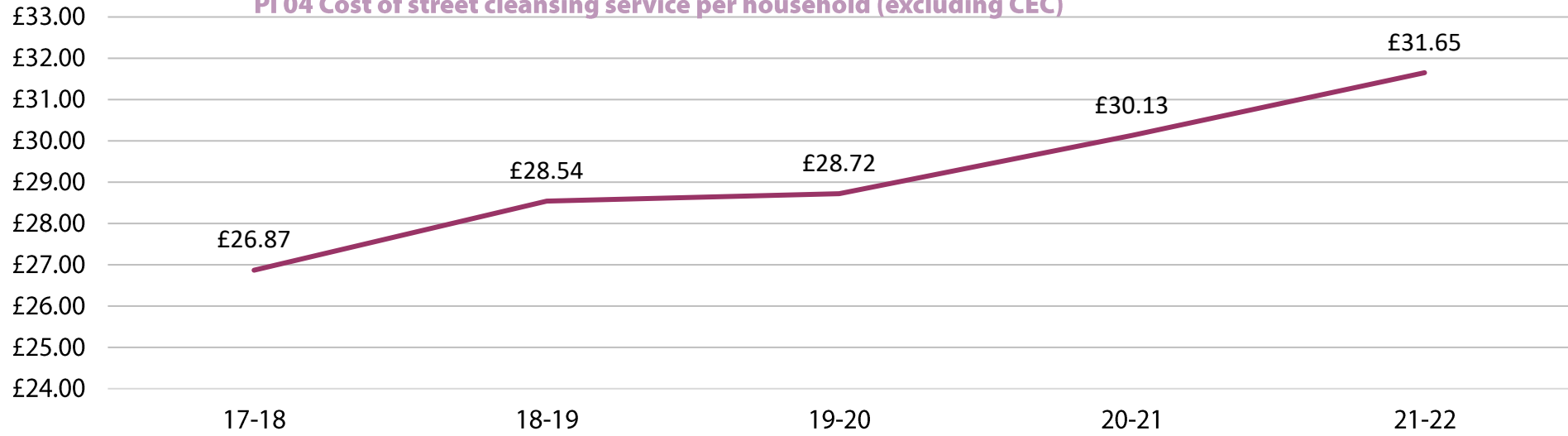


The costs of street cleaning

PI 05 Cost of street cleansing service per head of population (excluding CEC)



PI 04 Cost of street cleansing service per household (excluding CEC)



Top Ten Income Generation sources

- Increasing fees and charges
- Removal of bulky waste
- Cleaning of private land / other departments
- Delivering services for town /parish councils
- Weed spraying for Highways authorities
- Jet washing services for graffiti removal/surface cleaning for private clients
- Clean – up charges after public events
- Advertising on litter bins
- Clearance of fly-tipping on private land
- Housing garden care/clean up/rubbish removal



Top Ten service efficiencies over the past 5 years

- Service integration
- Increasing use of technology – ‘smart bins’
- Increased use of mechanised sweeping
- Depot rationalisation
- Team working
- Route optimisation
- Reducing frequencies - residential and rural sweeping, litter bin emptying
- 7 day working
- Move to multi-tasking
- Staff training to allow on-site decisions
- **Increasing promotion of community involvement**

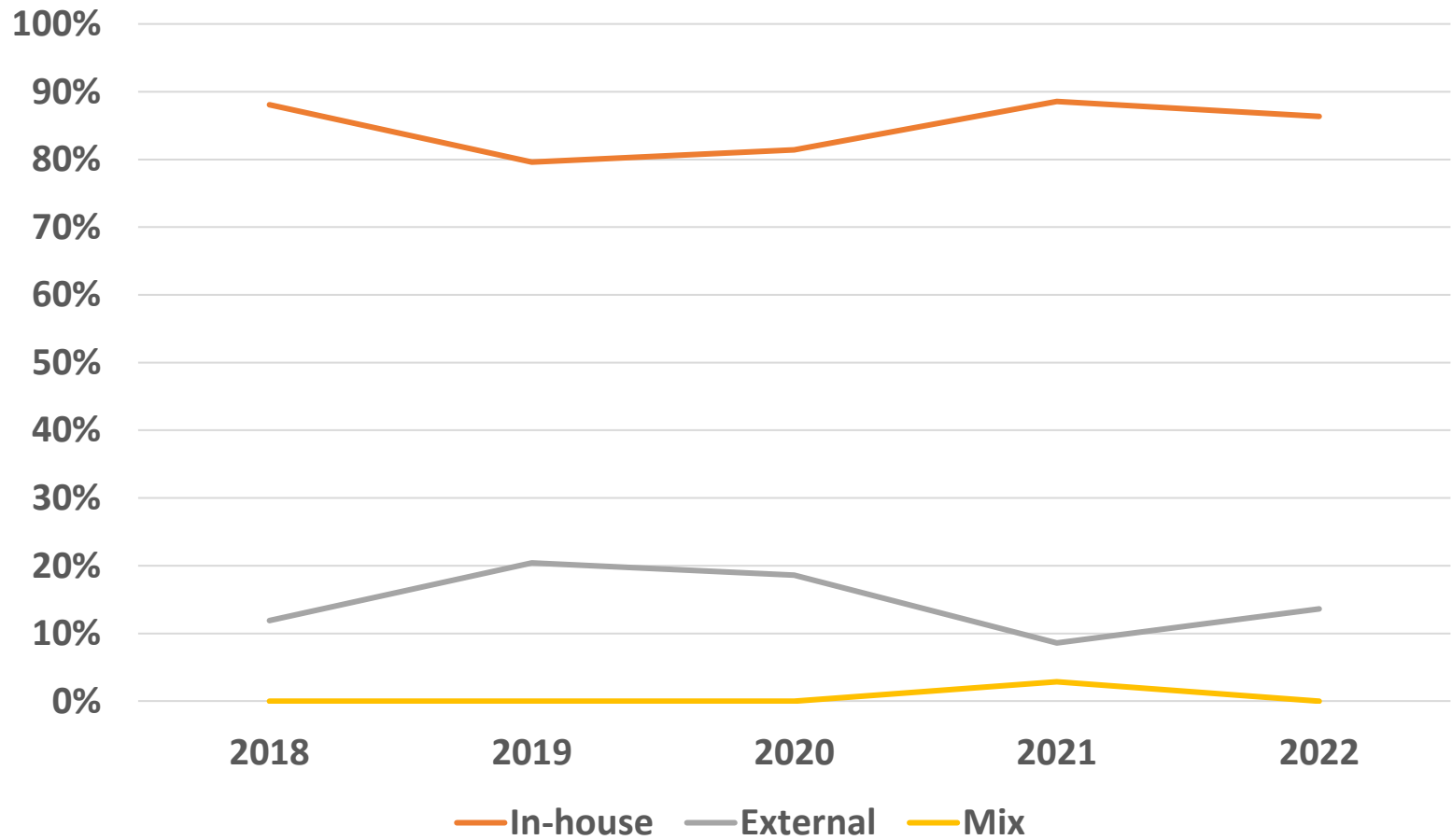


Community support & Campaigns

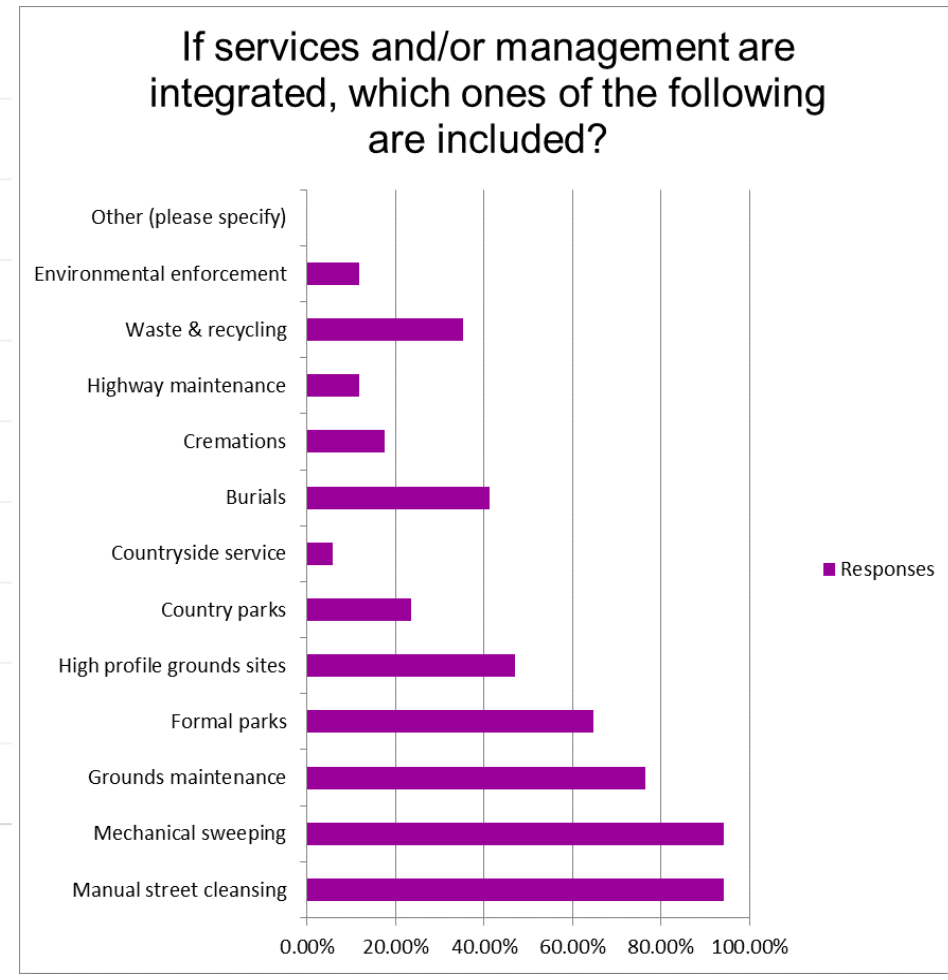
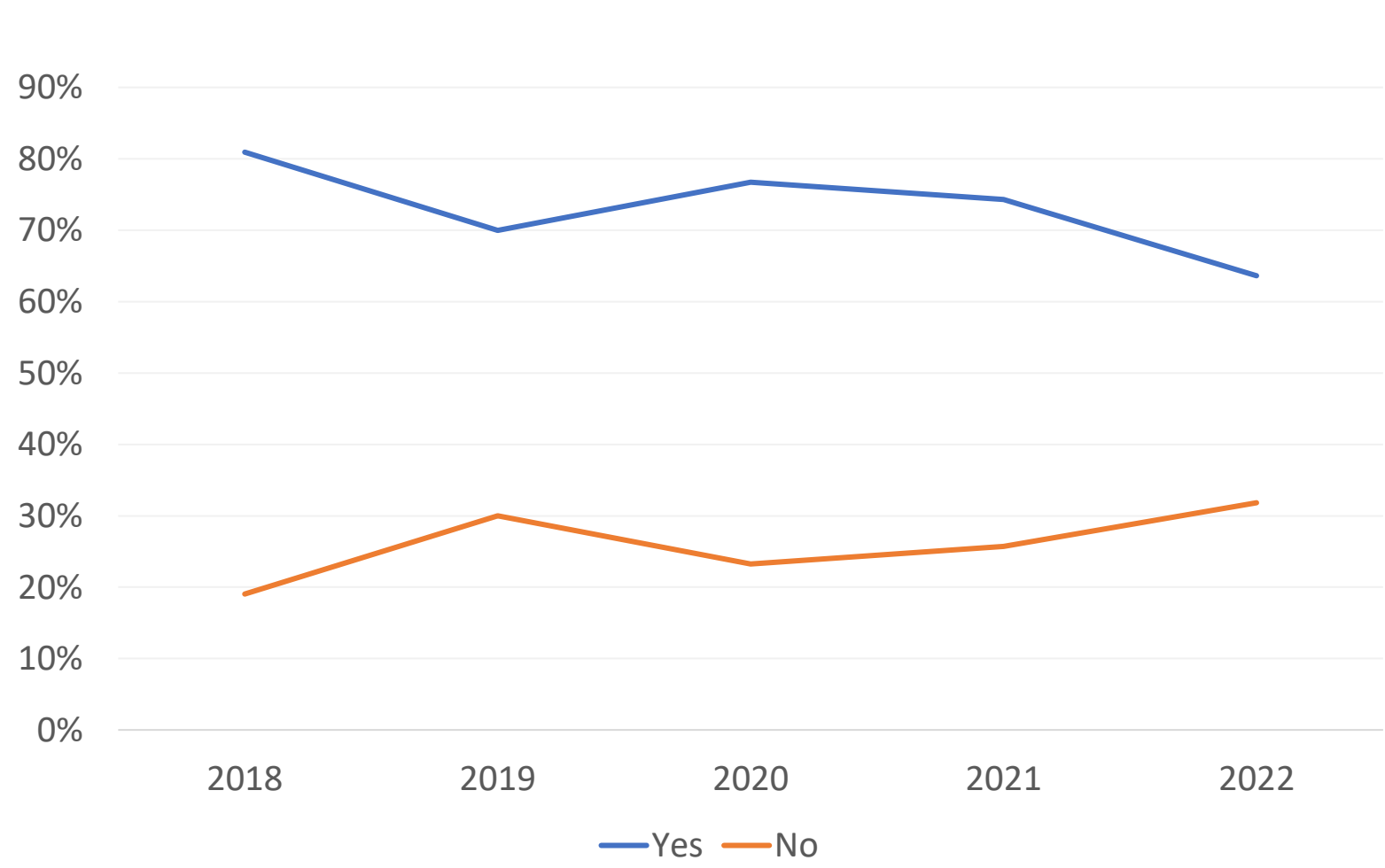
- Most authorities have community volunteers either as individuals or through street champion schemes.
- Additionality rather than replacement.
- Clean ups and litter picks most common use - little change
- Community pay-back still popular
- Fewer councils recording agreements/partnerships with large retail organisations.
- COVID had significant impact on volunteering.
- Most local authorities have educational programmes (litter, dog fouling, graffiti, school visits)
- Enforcement powers still being widely used, FPN's most common.



How is the street cleansing service currently managed?



Are you already part of an integrated street scene service?

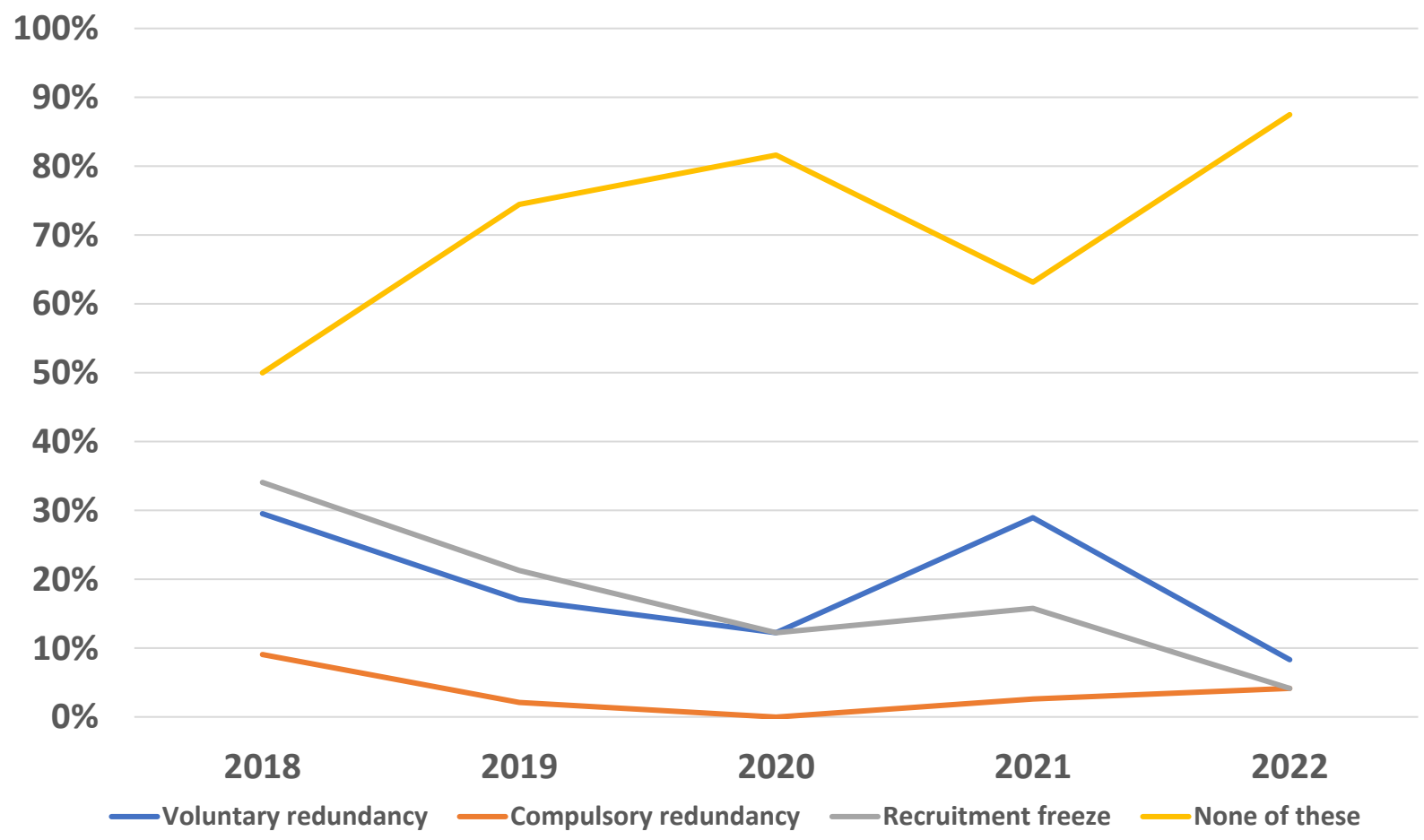


Service Integration

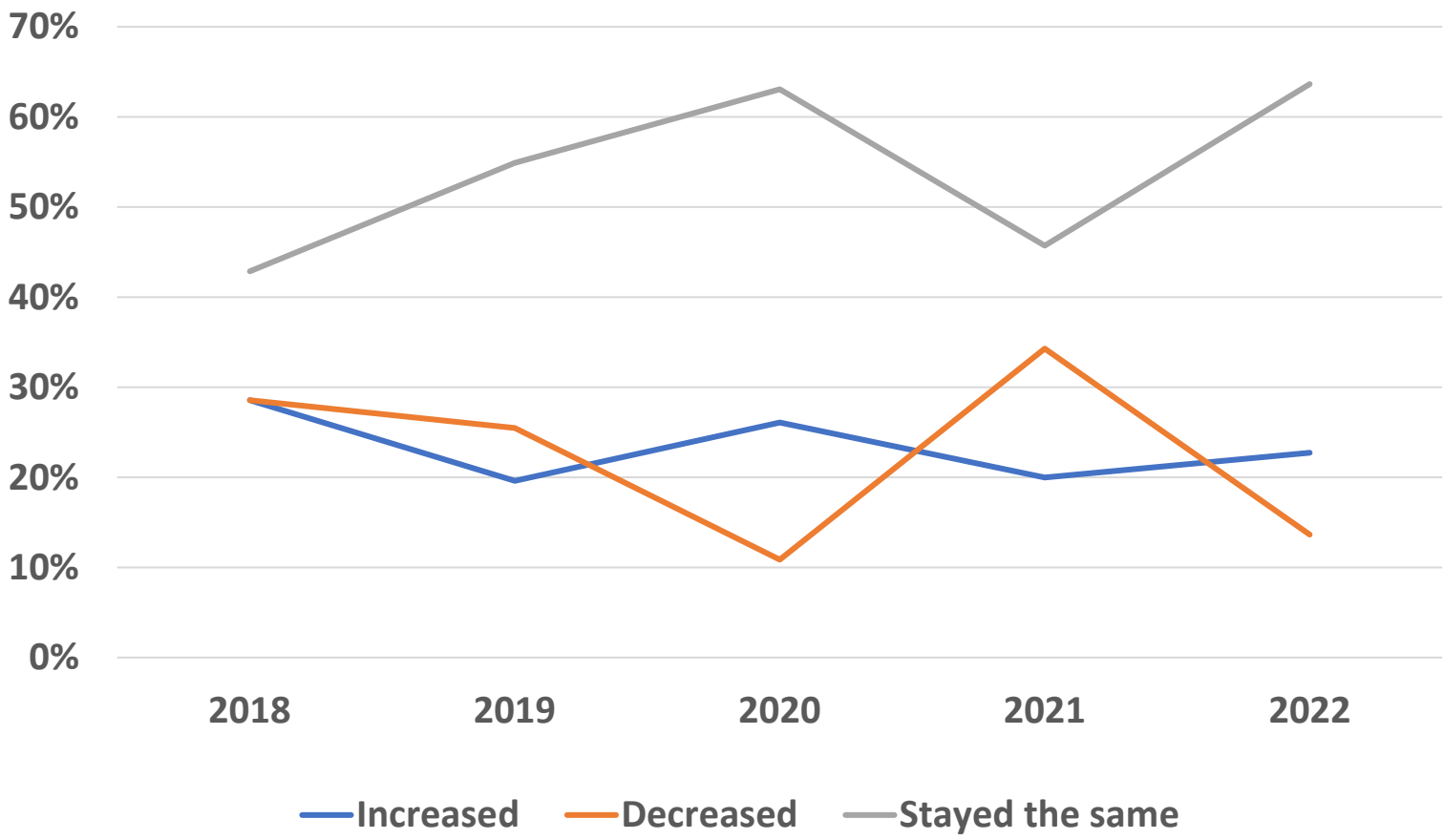
- Street Cleaning and grounds maintenance most common
- Reducing integration levels for Refuse/ Recycling collection and Bereavement services.
- Integration tends to be more at management level rather than front line operatives.
- Move towards multi-skilling of operatives.



Has or does your service intend to implement any of the following within the next 12 months?



5 year trend on cleanliness perceptions



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Street Cleanliness Report

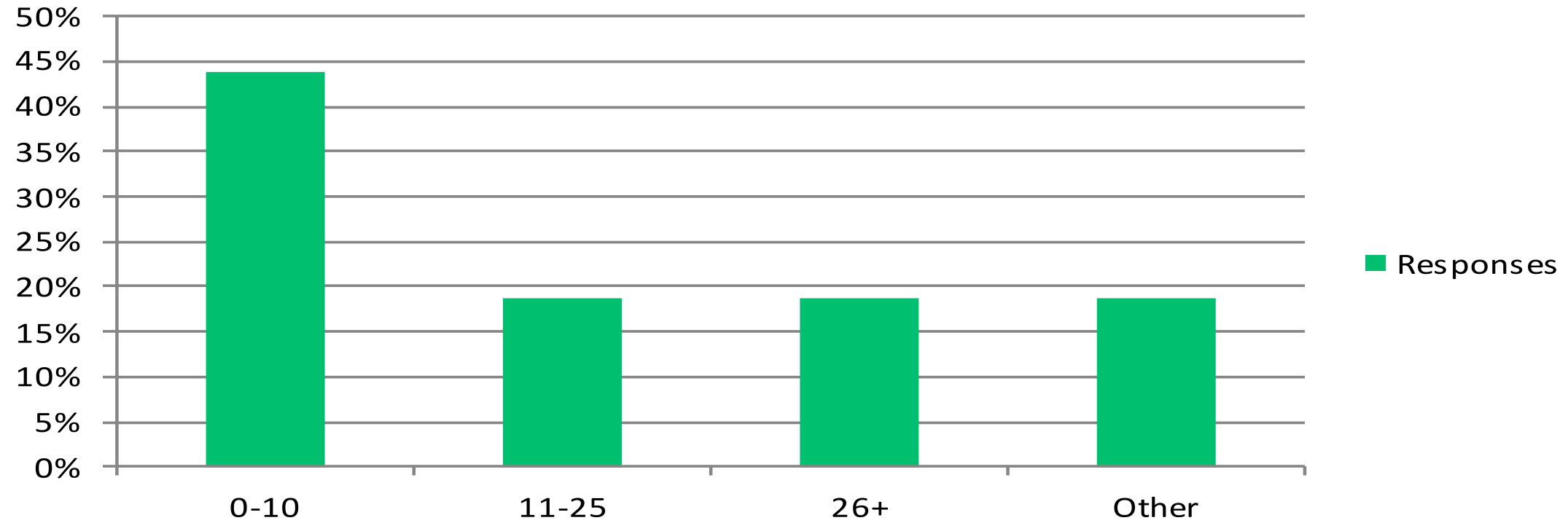
Results of the 2020/21 survey data sets



Public satisfaction levels for street cleaning

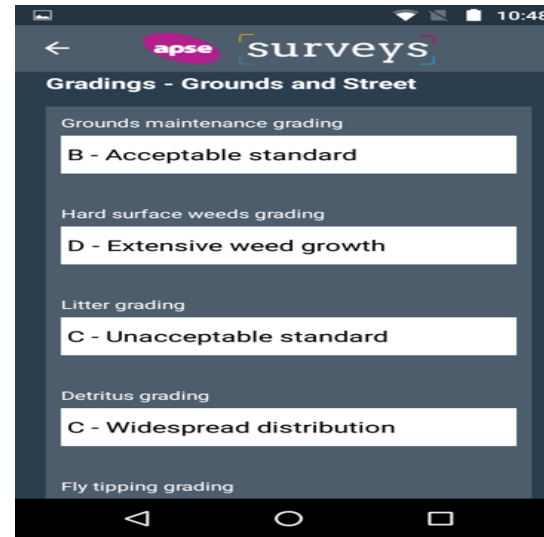


Approximately how many litter bins does your authority have per 1000 head of population?



Future considerations

- Climate change and ecological impacts of service -
- Service perception - 'habitat managers'
- Electrification of fleet
- Chemical use
- The power of social media and new communication opportunities.
- Greater public engagement
- New technologies
- Recruitment and retention
- Performance management
- New legislation EPR/DRS



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