



membership resources

State of the Market Survey 2008

Local Authority Refuse Services



Briefing 08/55
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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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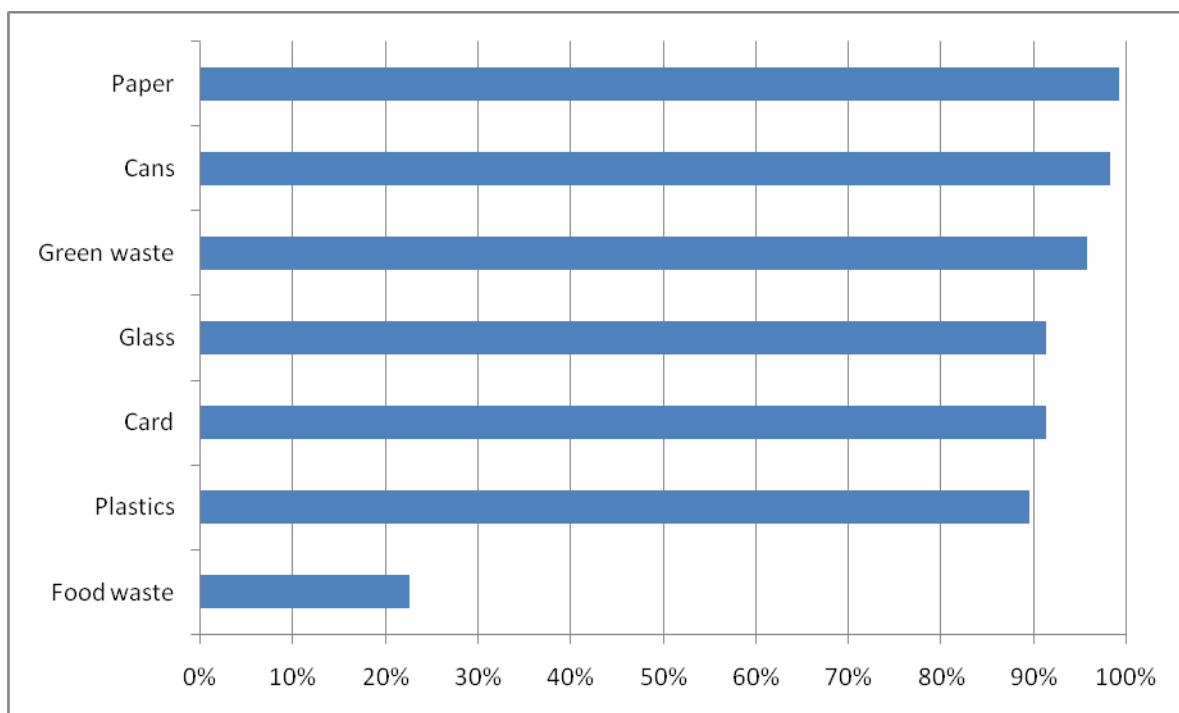
Local Authority Refuse Services State of the Market 2008

APSE conducted an on-line survey during October 2008. A series of questions were asked covering attitudes to the issues currently facing refuse and recycling services, the operation of these services and challenges for the future. 118 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 questions is as follows:

Answer Options	Weekly	Alternate weekly collections
Paper	29	84
Card	23	74
Glass	27	67
Plastics	25	68
Green waste	18	87
Food waste	27	4
Cans	28	80

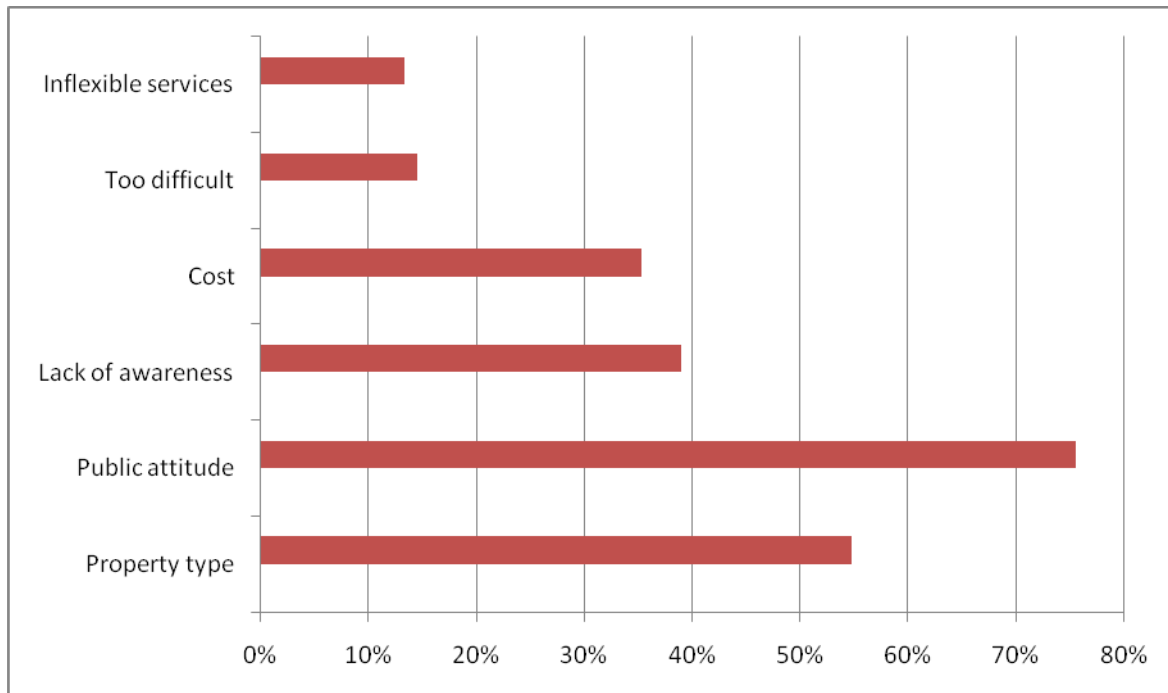
Members were asked which activity has been the most difficult to implement and the results showed that food waste was thought to be the hardest to implement, whilst paper, glass and cans were thought to be the easiest. The number of responses for each of the questions is as follows:

Answer Options	1 (easy)	2	3	4	5 (hard)
Paper	56	31	16	4	1
Card	43	24	18	10	2
Glass	46	25	19	2	2
Plastics	34	27	11	18	9
Green waste	36	30	17	15	3
Food waste	8	3	5	11	9
Cans	55	30	17	3	1

Recycling activities at bring sites are as follows:

- Glass - 98.9%
- Paper - 94.7%
- Cans - 93.6%
- Textiles - 87.2%
- Plastic - 80.9%
- Cardboard - 73.4%
- Wood - 27.7%

The main barrier to recycling was thought to be public attitude:



b) Impact of improved recycling

92% of respondents stated that improved recycling had increased the overall cost of service, 85% stated that this had increased staff numbers, 75% stated that it had increased training needs and 89% stated that it had increased the number of vehicles.

Of the respondents (England only) who stated that this had increased costs, 67% stated that alternate weekly collections had helped to offset the costs.

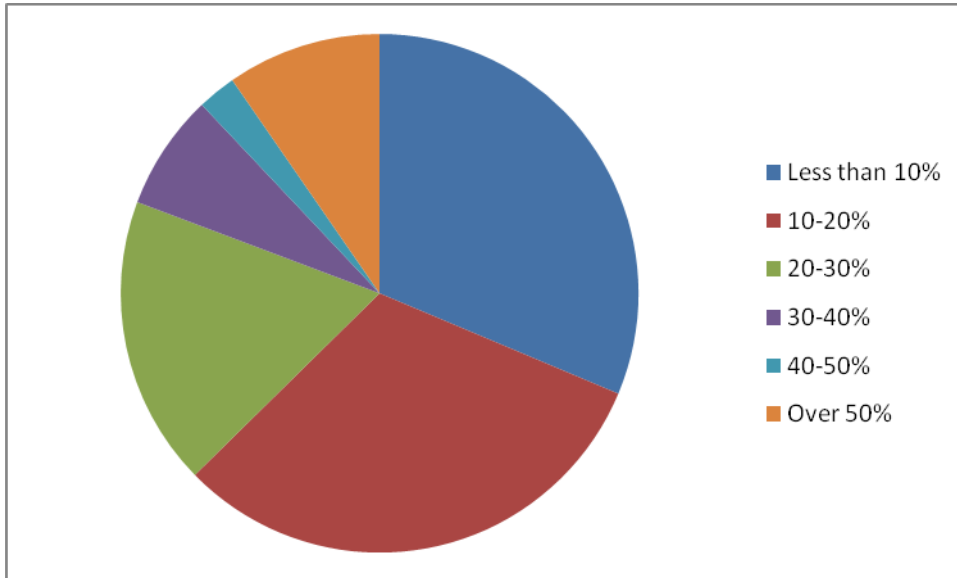
All respondents were asked how the increased costs have been met and 82% of respondents stated that this was through additional resources and 22% stated that this was through existing resources (please note, 3 respondents stated that this has been met through both additional resources and existing resources).

c) Collections and disposal methods

- 56% do co-mingled collections whereas 51% source segregate
- 89% send residual waste to landfill and 23% use incineration

d) 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:



- 90% of respondents expect the refuse budget to stay the same, increase or increase significantly next year.
- 69% expect the service to be managed in-house within the next 2-3 years and 5% expect the service to be managed through Joint waste authorities.

e) Your opinions

The table below shows the number of respondents who agree/disagree with the statements.

Answer Options	Disagree strongly	Disagree	Agree	Agree strongly	No opinion
Financial incentives will motivate the public to recycle more	6	29	32	9	6
Enforcement is effective in reducing waste	8	21	41	9	3
Enforcement will offset the benefits of incentives	7	44	17	5	9
Bulky waste removal should be free of charge	19	35	16	10	2

f) Job evaluation

- 61% have completed job evaluation
- How has job evaluation affected wage costs?
 - 13% increased a great deal
 - 27% increased slightly
 - 35% about the same

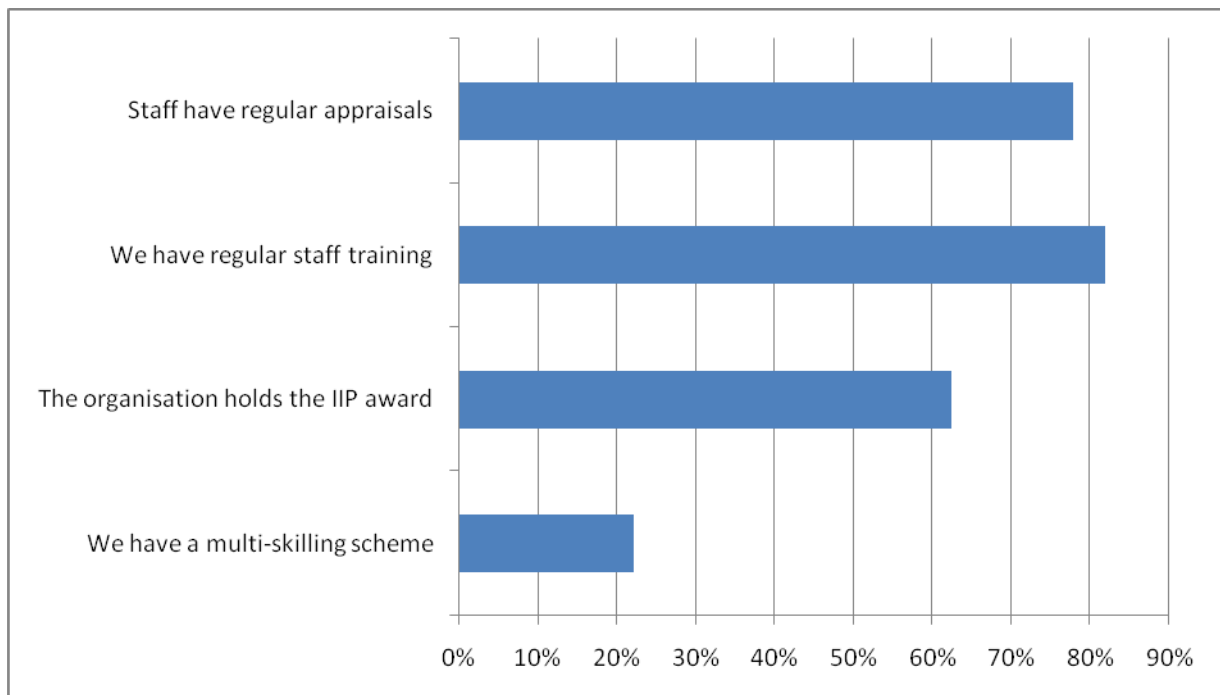
- 19% decreased slightly
- 6% decreased a great deal

f) 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 Percent
Too high	36.0%
Slightly above average	22.7%
About average	28.0%
Slightly below average	12.0%
Very low	1.3%

The staff training responses were as follows:



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:-

- Efficiencies, procurement and service transformation
- Building cleaning
- Citizen engagement
- Local authority, police and fire authority partnerships
- Community safety and security
- Housing management, construction and building maintenance
- Parks, horticultural and ground maintenance
- Roads, highways and street lighting
- Social care
- Leisure management and community venues
- Vehicle maintenance and transport operations
- Waste management, refuse collection and street cleansing
- Workforce strategy and employee relations