State of the Market Survey 2022

Local Authority Street Cleansing Services

Briefing Note 22-11

March 2022

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

For any enquires in relation to the survey, Wayne may be contacted on:

Tel: 0161 772 1810
Email: wpriestley@apse.org.uk

Local Authority Street Cleansing Services

State of the Market 2022

APSE conducted an on-line survey during December 2021 and February 2022. This follows on from the 2009, 2011, 2012, 2014, 2015, 2016, 2017, 2018, 2019, 2020 and 2021 Street Cleansing State of the Market surveys where similar questions were asked to allow for trend comparisons. A wide variety of local authorities from across the UK responded to the survey thus providing a meaningful cross-section of views for the survey. This report identifies the key findings of the survey.

Results from the survey

a) Service Budgets

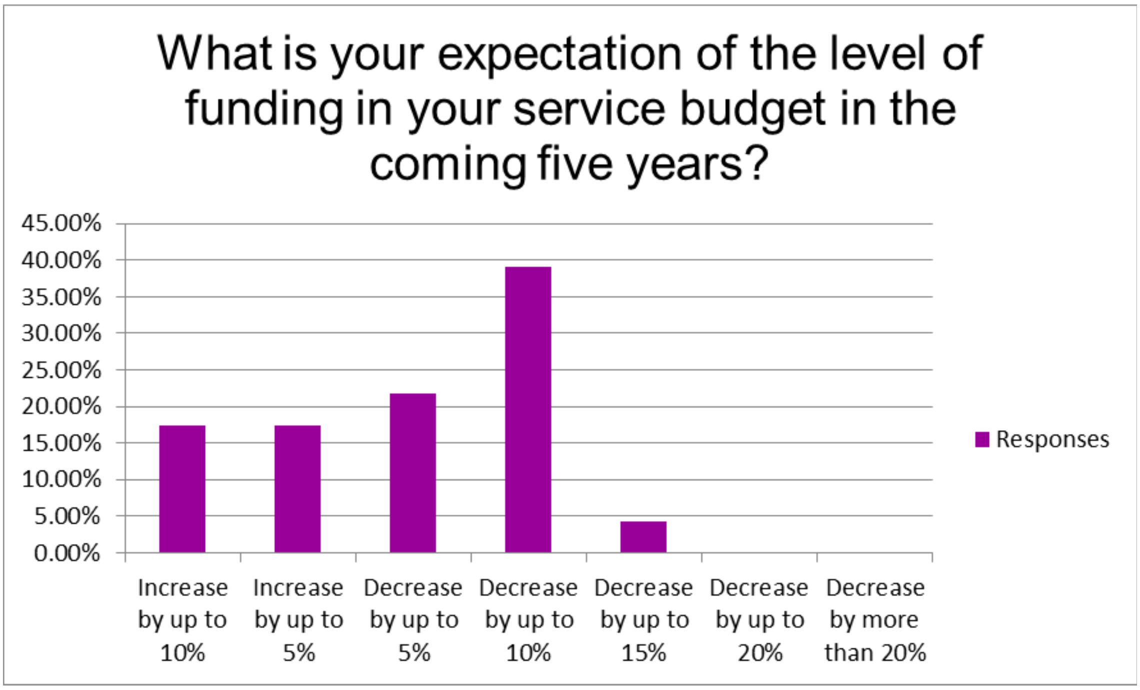
Members were asked if they thought that the street cleansing budget will change over the next year and 80% said yes (compared with 56% in 2021). Of these, 60% expect budgets to **decrease** over the next year which is a fall of 2% on 2021 when 62% expected budgets to decrease. The most obvious cause of this continuing reduction in budgets is still likely to be the financial impacts on council budgets caused by the Coronavirus pandemic and the additional cost to budgets this has brought corporately.

However, although there has been a fall in those expecting budgets to decrease in the next 12 months, prior to the start of the pandemic, in 2020, there appeared to be an ongoing reduction in the number of authorities who were anticipating budget decreases. This is demonstrated by the fact that in 2020, 52% of respondents expected budgets to decrease, in 2019 this was 63% of respondents and in 2018 over 81% expected budget reductions. Therefore, this trend suggests that the number of local authorities making budget cuts in street cleansing, prior to 2021, which was the first full year of the pandemic, had started to decline overall.

Regarding the level of cuts anticipated over the next five years there has been an increase in those expecting cuts of up to 10%. In 2022 61%, are expecting cuts of up to 10%, as opposed to 34% in 2021. Encouragingly the results from the 2022 survey show a decrease in those expecting budget cuts of 10 % or more, from 14% in 2021, to 4% in 2022. Finally, for the first time in several years there are no authorities expecting budget cuts of over 15%.

Therefore, the figures show whilst 61% of authorities are expecting budget cuts of up to 10% **over the next 5 years**, few are expecting cuts of more than this, whilst almost 40% are expecting increases of up to 10%.

This longer-term view may seem somewhat contradictory to the earlier results showing 61% are expecting budget cuts in the **next twelve months**, but the answer is likely to be that over the coming five years, when hopefully the negative impacts of the pandemic will have subsided, then local authorities will be investing in the long-term future of their services resulting in greater levels of investment and by association increased budgets.



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
- Reducing sweeping frequencies and litter bin emptying.
- Better joint working between street cleansing and refuse collection teams
- Joint authority working
- ICT investment
- 7-day working to reduce overtime costs
- Increasing staff training to allow multi-tasking and giving greater empowerment to make on-site decisions.

From these responses there were few new areas being considered which may suggest the options for service efficiencies are now becoming more difficult to identify.

The survey asked 'Do you have any income generation schemes' and 46% said 'yes' which is an increase on 2021 when 32% answered 'yes'. In 2020 54% stated they had such schemes. Undoubtedly the fall in 2021 was likely to be due to the impact of Coronavirus, when priorities lay elsewhere. Possibly the increase in 2022 is a sign that services are now returning to normality and are able to look again at raising income to support the service budget.

For those that answered yes, they indicated using the following ways of implementing their income generation strategy:

67% were increasing fees and charges, 22% were delivering income generating services as part of an income strategy and, 11% were doing so through a wholly owned council company., The types of services being delivered were: -

- Bulky waste disposal
- Cleaning of private car parks, housing and industrial estates.
- 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 regarding staffing levels.

The responses were as follows:

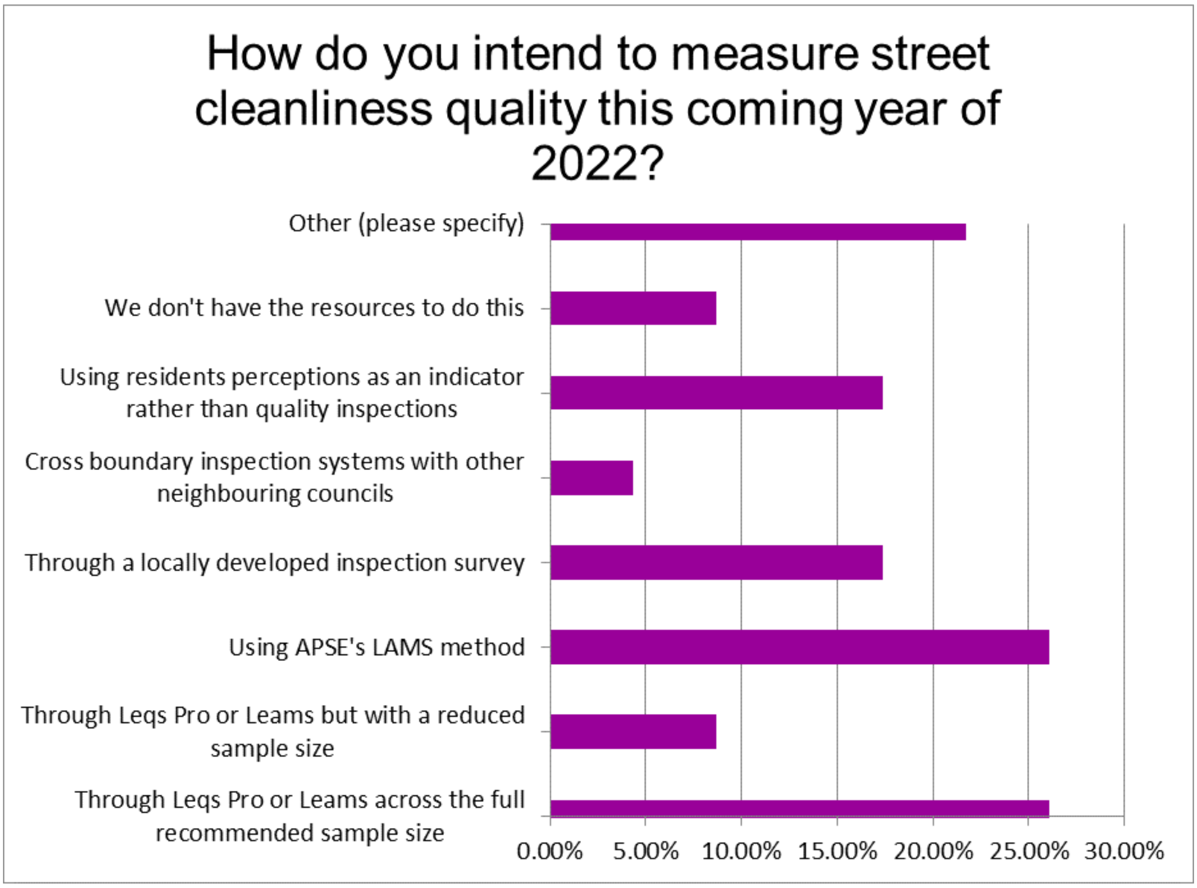
Changes have occurred across all the areas measured. The proposed use of voluntary redundancy had fallen from 17% in 2019 to only 12% in 2020, however in 2021 this rose to 29%. This appears to have been something of an anomaly as only 8% are considering this as an option for 2022. Compulsory redundancy was not stated as an option by any respondents in 2020 and by only 1% in 2021. However in 2022 this stands at 4%. Recruitment freezes has fallen significantly with only 4% now considering this an option as compared to 12% in 2021. In 2020, 82% of respondents were not intending to use any of these options as compared to 74% in 2019. In 2021 this fell to 63% of respondents who were not considering some form of staffing reductions, however, in 2022 this has again risen to 87.5% who are not considering any form of staff reductions. This may suggest that the uncertainties caused by the early impacts of Coronavirus could have caused a rethink about staffing levels.

b) Standards of cleanliness

When asked how cleanliness levels had changed over the current year, only 13% said they had stayed the same as compared to 46% in 2021. 23% of respondents reported that their cleanliness levels had improved compared to 20% in 2021. However, 64 % said cleanliness levels had fallen compared to only 34% in 2021. Again, we can look to the impacts of the pandemic and reduced staffing levels either through sickness or redeployment to other services e.g. waste and recycling collection and bereavements services, resulting in fewer street cleansing staff on the ground causing a fall in cleanliness levels.

However, on a more positive side 46% expect cleanliness levels to improve over the coming twelve months, 9% expect them to stay the same and 45% still expect a decrease in cleanliness levels, but this may be an impact of pandemic problems and as the service returns to normal levels of cleanliness will improve.

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 or other council services. A small proportion stated volunteers were involved in measuring cleanliness levels.

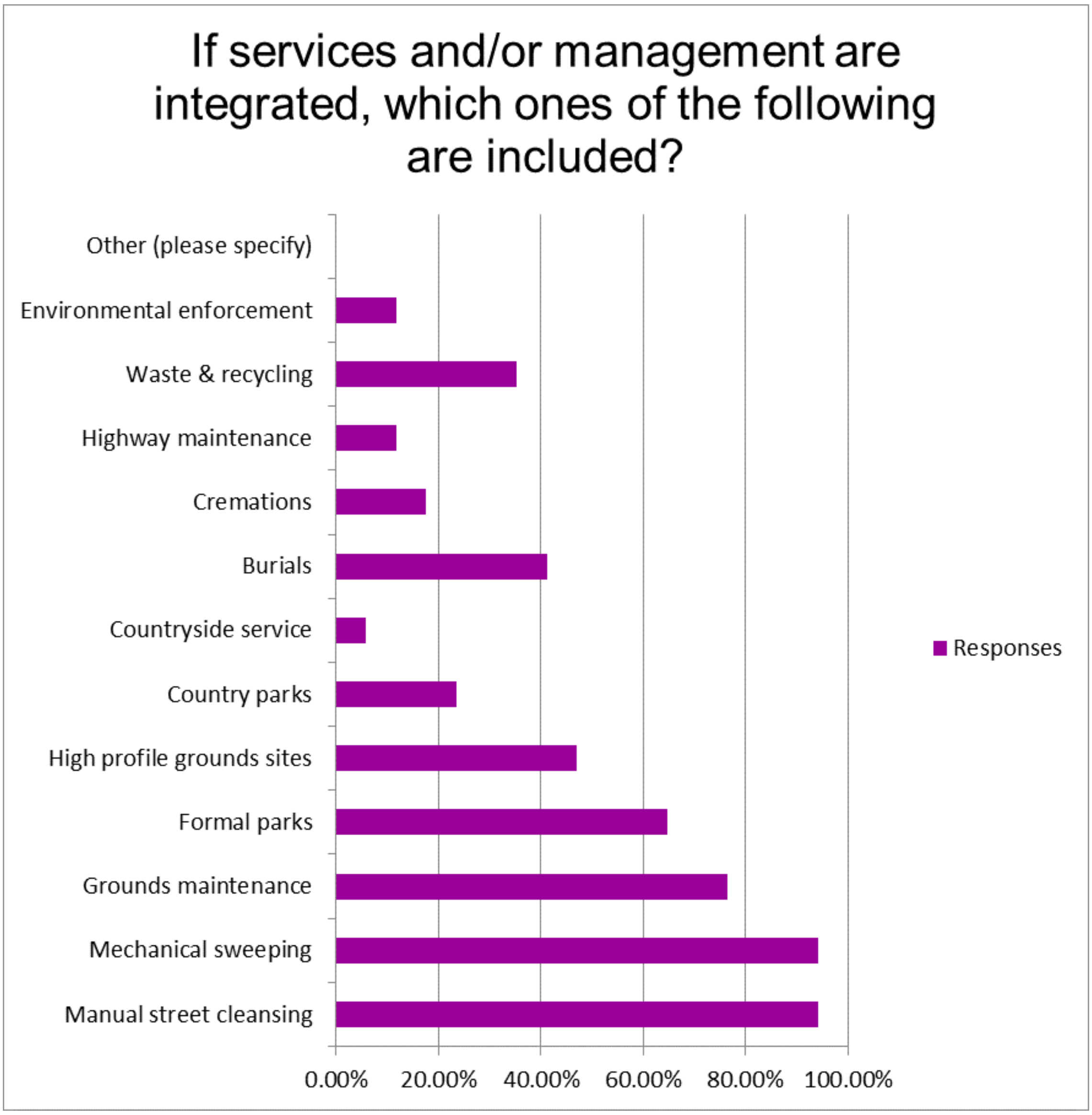
The number of local authorities using [APSE's Land Audit Management System]() has grown to now become a nationally recognised system for measuring street cleaning levels. The LAMS monitoring system, also allows the simple measurement of grounds maintenance quality standards for parks and open space and 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 available in partnership with Bbits/ Love Clean Streets.

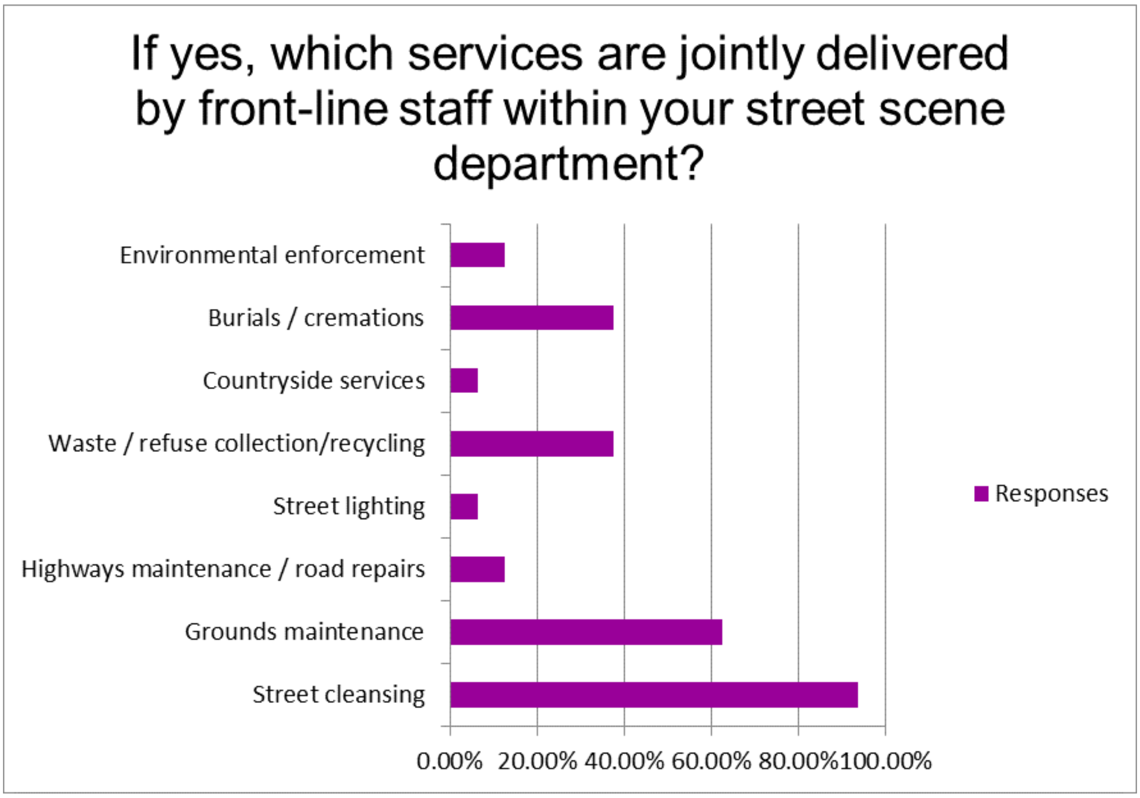
C) Street scene

67% of respondents indicated that they are part of an integrated street scene service as compared to 74% in 2021, 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.



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: -



Of those who stated that they were not already part of an integrated street scene service, 58% expected to become part of an integrated street scene service in the near future.

d) Street cleansing operations

77% stated that they have area-based teams (89% in 2021) 20% of respondents stated that they operated over 5 days and 80% operate a 7-day service. 17% currently undertake night-time street cleansing service as opposed to 23% in 2020.

The survey asked how the street cleansing service is currently managed and 86% stated that this is in-house (89% in 2020), and 14% external (9% in 2021). For those where the service is currently managed externally, 33% said it was up to 5 years 67% of respondents stated that the contract length is 7–10 years

33% of respondents indicated that there is an option to extend the contract. It is noticeable although there is a slight increase in those expecting to be managed externally, of those that are, there has been a move towards increasing the contract length. Whilst this allows the financial costs to the contractor investing in providing the service, to be spread over a longer period, it is equally the case that such extended contracts can risk baking-in any issues for councils in performance management and enforcement, and ability to adapt the service should service needs change.

e) 'Binfrastructure'

APSE has worked with the Department for Environment, Food and Rural Affairs (DEFRA) and the former Department for Communities and Local Government (now Department for Levelling Up Housing and Communities DLUHC) on the National Litter Strategy for England, and is currently part of the working group led by WRAP on the Extended Producer Responsibility requirements on appraising different approaches to the methodology to quantify and apportion costs to producers who's packaging makes up a high proportion of street litter.

As part of this work, we are undertaking ongoing research to discover how local authorities address the issue of litter bin provision, recording locations, typology of bins and initiatives to promote greater use.

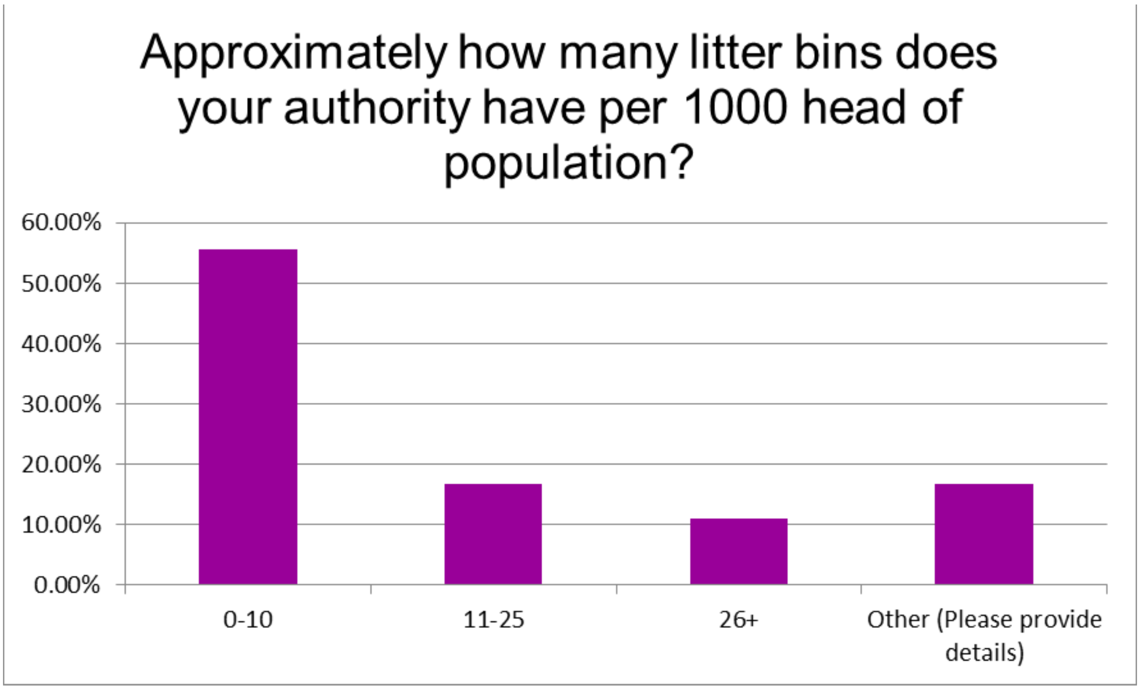
WRAP has produced a guidance document entitled *The Right Bin In The Right Place* which APSE also contributed to. The guidance document can be found here.

Therefore, we are continuing to include several questions which will help local authorities develop effective *binfrastructures*.

It is clear that according to this response less than 20% of the respondents do have some form of litter bin strategy/policy which is in sharp contrast to 2021 when over half reported that they had a strategy in place, this is an area which needs further investigation to get a more accurate picture of reality. Despite strategies being developed, there is still the concern 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 guidance document provided by WRAP towards developing a formal litter bin strategy 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. 71% 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.



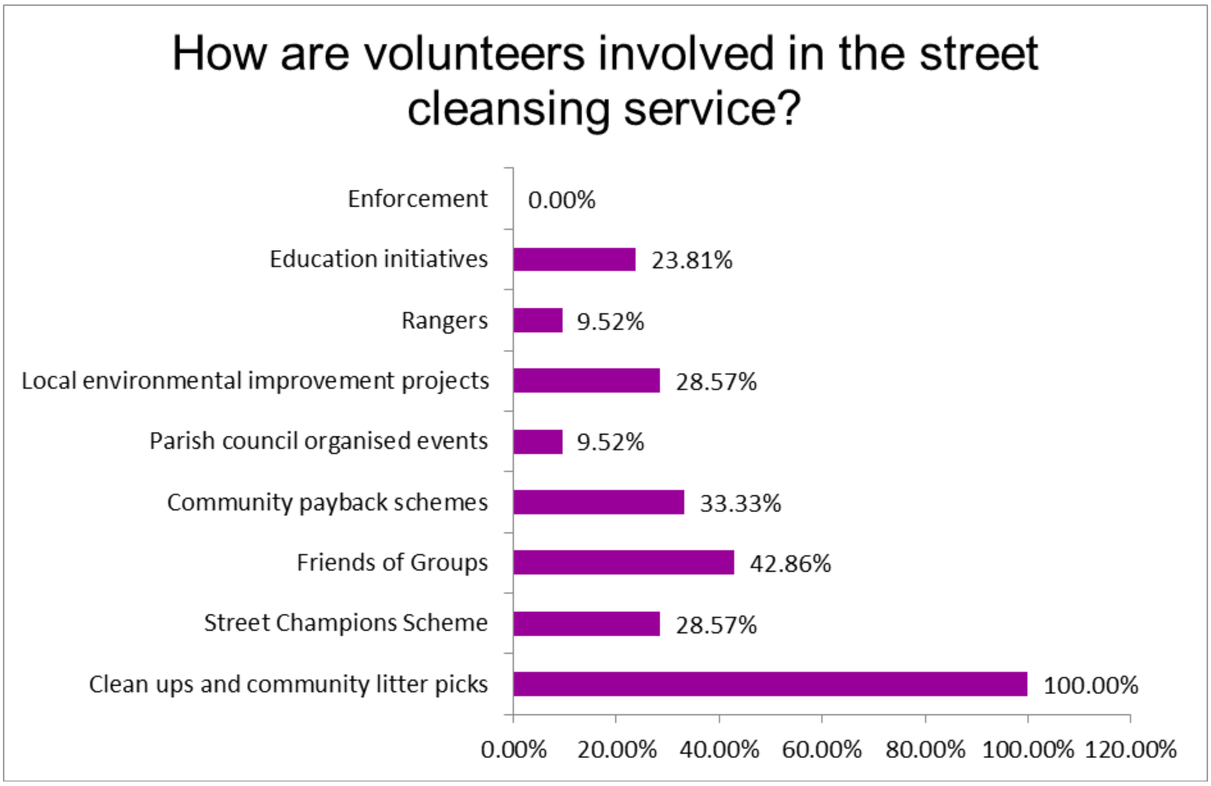
The graph shows at 56% the provision of 0-10 litter bins per 1000 head of population seems to be the most common level of provision.

Regarding the accurate mapping of litter bin assets, only 67% 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 79%, 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:-

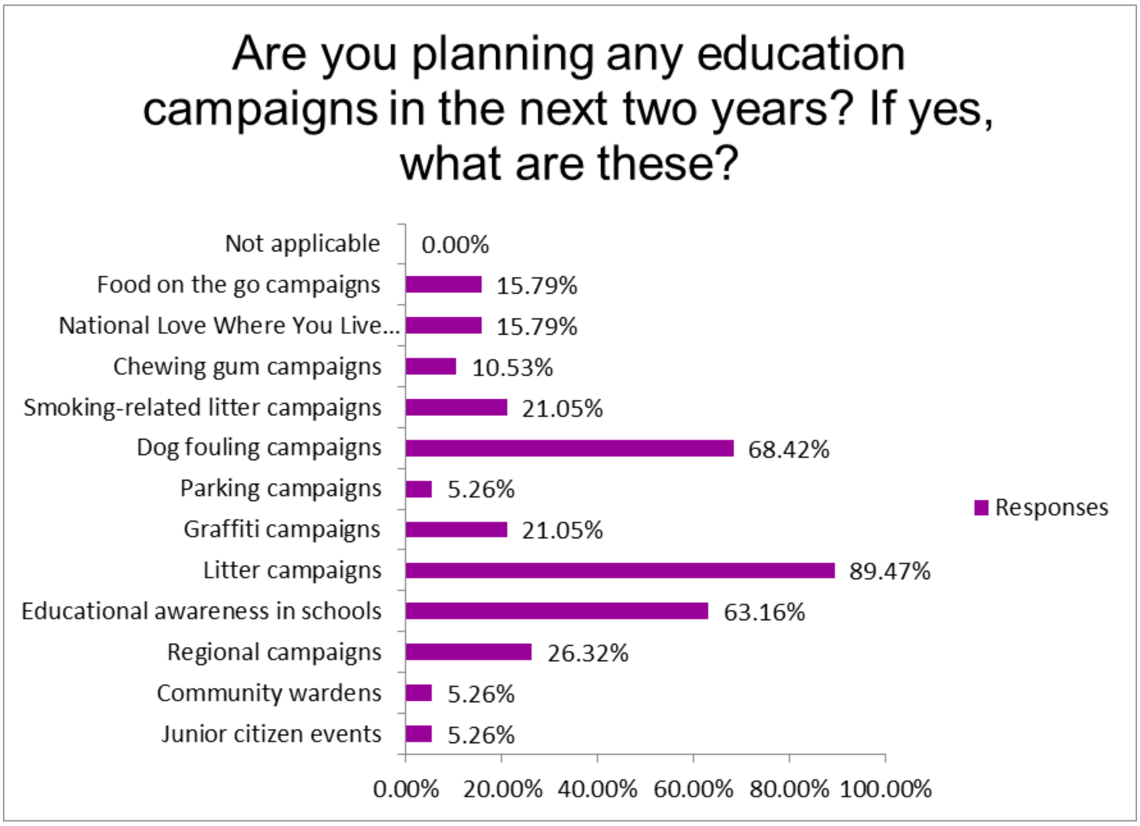


When questioned about working with partners to provide street scene services, 26% stated that they provide street scene services as part of a Business Improvement District (BID) as compared to 28% in 2021. APSE found that 19% of respondents have individual street cleansing agreements with supermarkets, retailers and other businesses which is roughly the same as in 2021 at 20%. Only 5% of 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 decrease on 2021, when 15% of respondents said they had agreements. This fall may be in some part a reflection of the impacts of the pandemic when such partnerships may have drifted as other work took priority.

In 2021, 67% of respondents stated that they had community sector involvement in street cleansing. However, in 2022 this has fallen slightly to 65%, no doubt impacted upon again by the pandemic.

The main areas where respondents identified external support were in relation to clean ups and community litter picks (86%), Friends of Groups (35%), local environmental improvement projects (50%), community payback schemes (14%) and education initiatives (7%). It is noticeable most of these figures had fallen against 2021 due no doubt to the need to socially distance and isolate during much of 2021 and partly into 2022.

In terms of education campaigns, 90% are planning these in the next 2 years as opposed to 71% in 2021. The main campaigns being planned are litter campaigns (89%), dog fouling campaigns (68%) and educational awareness in schools (63%). The full breakdown is as follows:

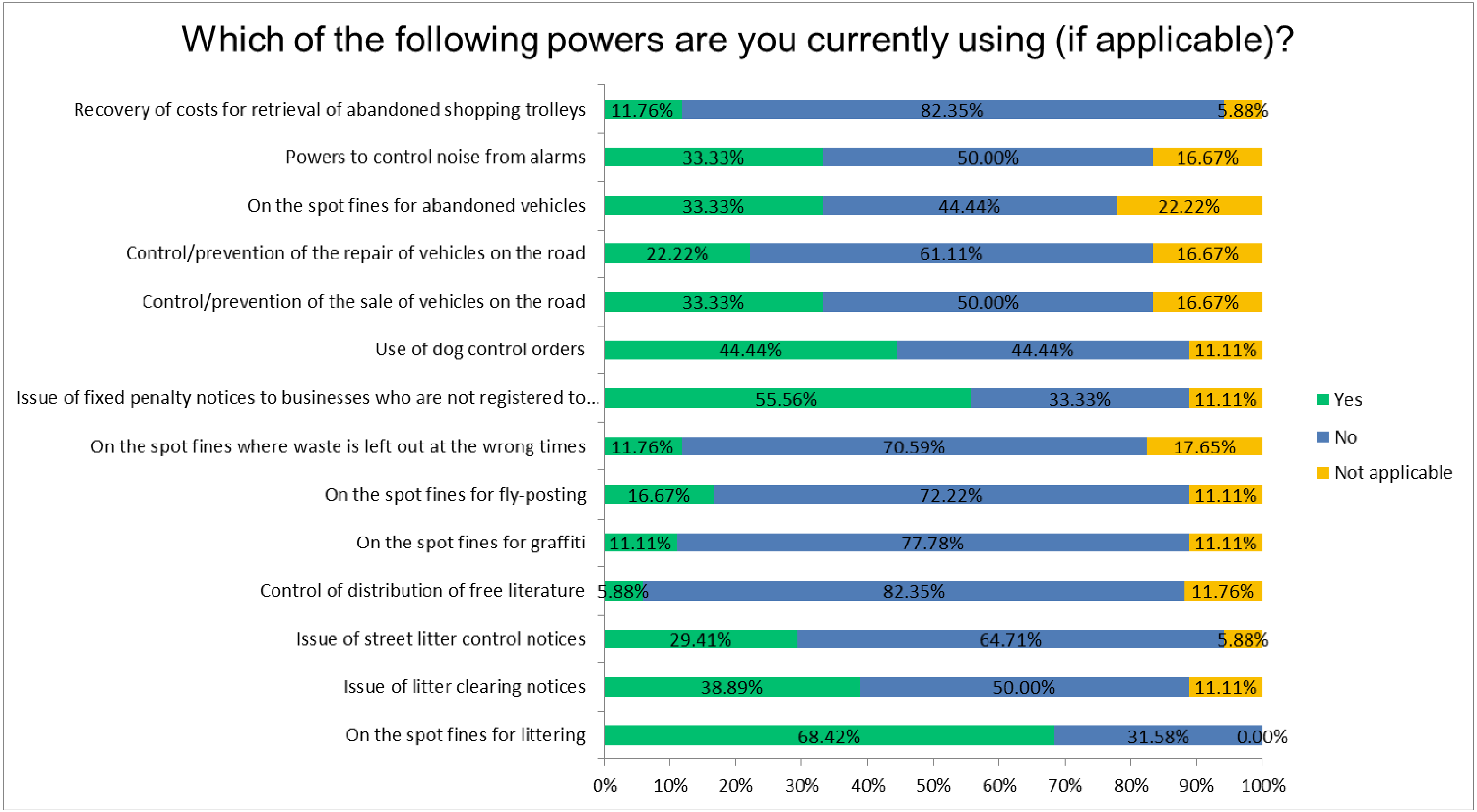


Other educational initiatives included: fly-tipping campaigns, litter thrown from cars and business engagement.

g) Enforcement

Near to 62% of respondents thought that there will be an increase in enforcement / notices issued in the next 2-3 years, which is a slight decrease from the 2021 figure of 65% and a further fall from the 2020 figure of 71% Again, the availability of staff and the pandemic may have influenced some of the figures provided.

The survey asked which of the following powers were being used currently (where applicable), the results are shown on page 16. 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.



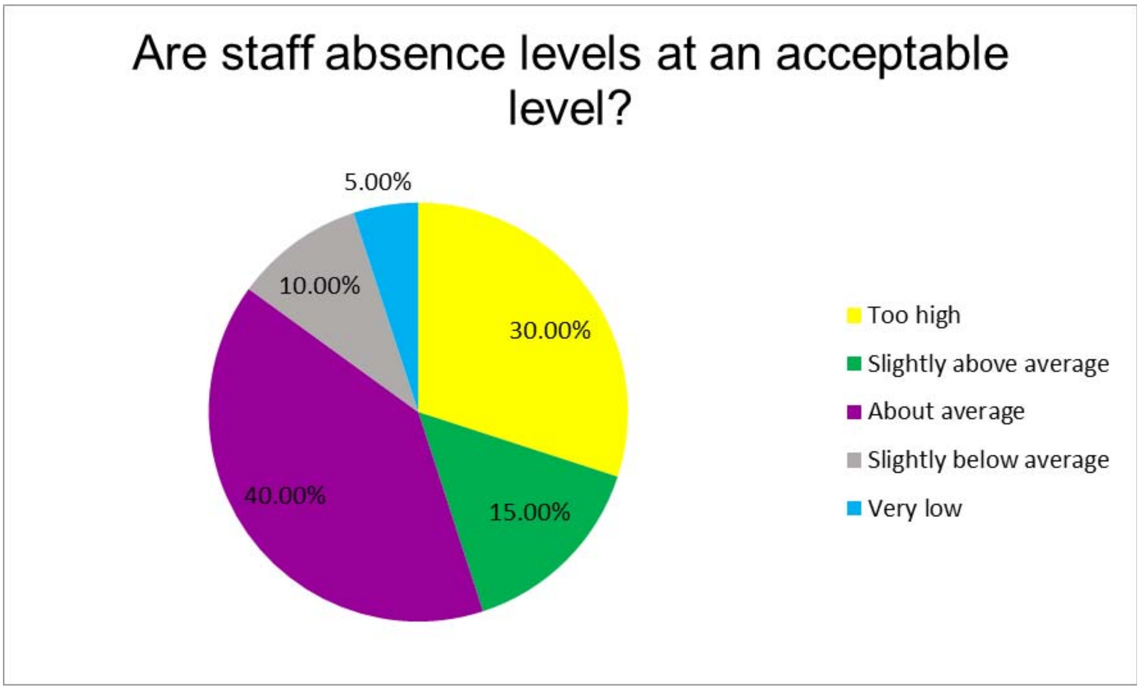
Which of the following powers are you currently using (if applicable)?
Recovery of costs for retrieval of abandoned shopping trolleys
11.76%
82.35%
5.88%
Powers to control noise from alarms
33.33%
50.00%
16.67%
On the spot fines for abandoned vehicles
33.33%
44.44%
22.22%
Control/prevention of the repair of vehicles on the road
22.22%
61.11%
16.67%
Control/prevention of the sale of vehicles on the road
33.33%
50.00%
16.67%
Use of dog control orders
44.44%
44.44%
11.11%
Issue of fixed penalty notices to businesses who are not registered to...
55.56%
33.33%
11.11%
On the spot fines where waste is left out at the wrong times
11.76%
70.59%
17.65%
On the spot fines for fly-posting
16.67%
72.22%
11.11%
On the spot fines for graffiti
11.11%
77.78%
11.11%
Control of distribution of free literature
5.88%
82.35%
11.76%
Issue of street litter control notices
29.41%
64.71%
5.88%
Issue of litter clearing notices
38.89%
50.00%
11.11%
On the spot fines for littering
68.42%
31.58%
0.00%
0%
10%
20%
30%
40%
50%
60%
70%
80%
90%
100%
Yes
No
Not applicable

Regarding the powers being used, 68% of respondents now serve on the spot fines for littering and linked to this is the fact that 39% of authorities are also issuing litter clearance notices. There is clearly a use of other powers such as the control of free literature notices and notices are also being used to control noise from alarms as well as cost recovery for shopping trolleys. Noticeably where a fall has occurred is with regards to the number of authorities serving notice on people leaving waste out at the wrong time which may suggest this particular form of enforcement has proved effective and fewer instances of this type are occurring.

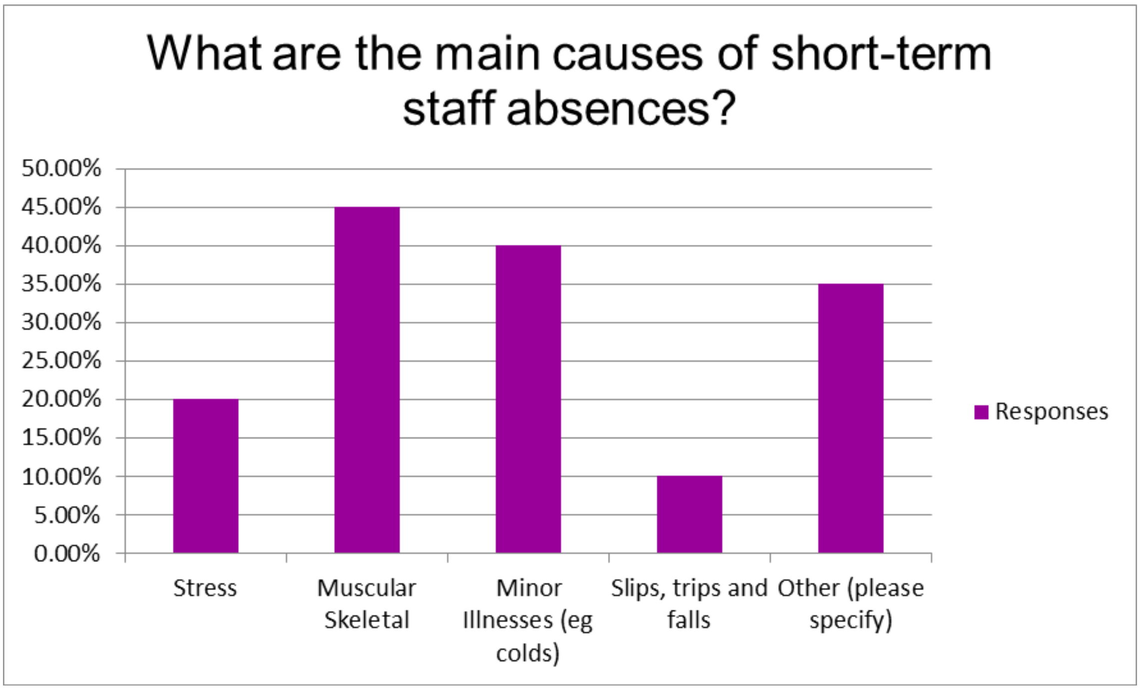
A further question was asked about why certain powers have not been used (where respondents answered 'no'. Reasons cited included, 'insufficient resources' 67% in 2022 as opposed to 57% in 2021 and 47% in 2020), 'it is covered by other agencies/ departments' (33% as opposed to 53% in 2021) 'they're not problem areas/we have other priorities' (28% as opposed to 50% 2021) and 22% cited 'political reasons' as opposed to 23% in 2021

h) Staff absence

In terms of staff absence 45% (26% in 2021), thought that staff absence was too high or above average, but 55% of respondents viewed staff absence as being around or below average levels. This increase is undoubtedly coronavirus related.



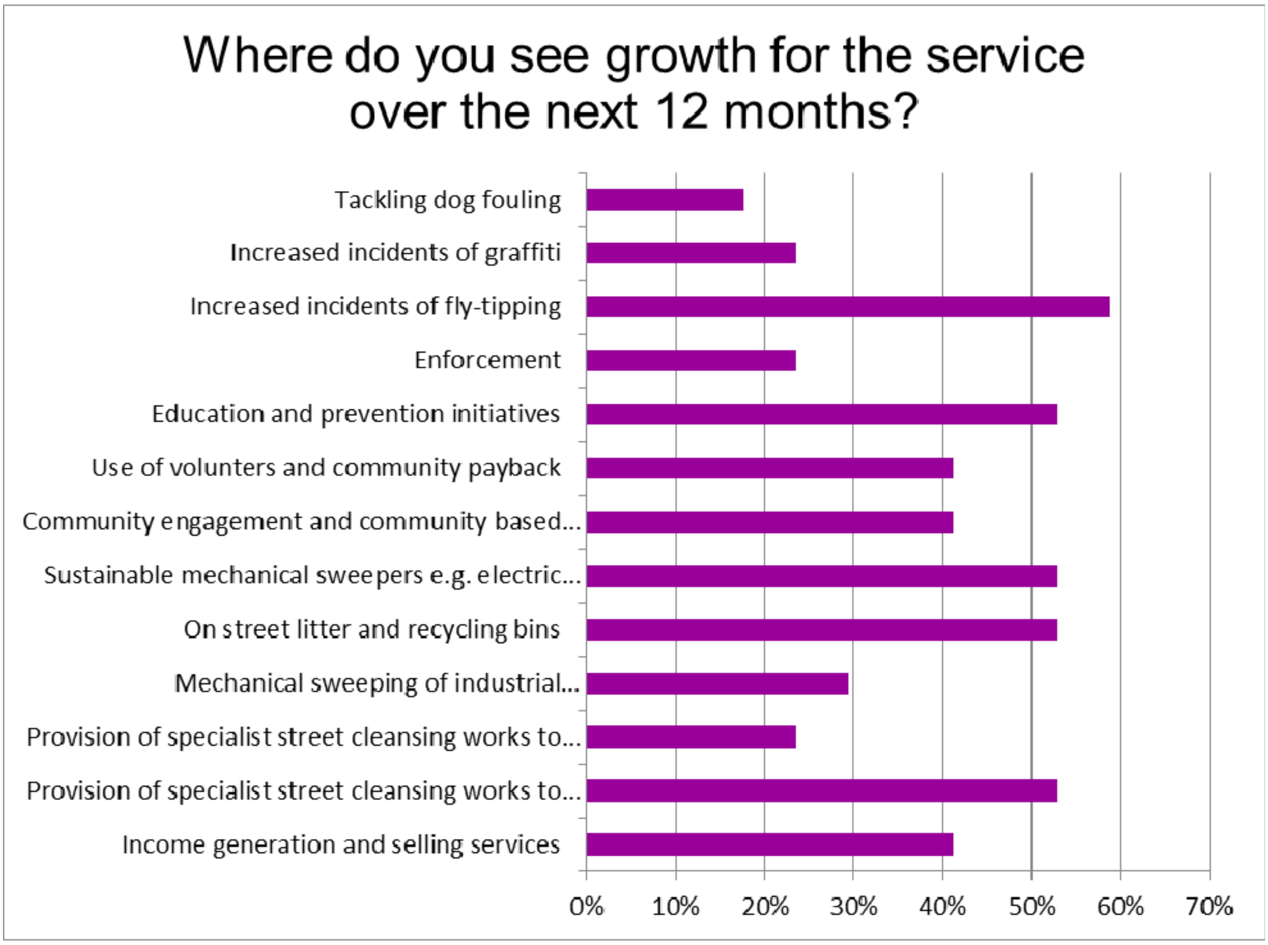
Staff absence levels from performance networks data appears to show that staff absence is well managed, however the survey data indicates that over a quarter of local managers believe absence is still too high. Perceptions of absence may therefore be outweighing the underlying data on absence.



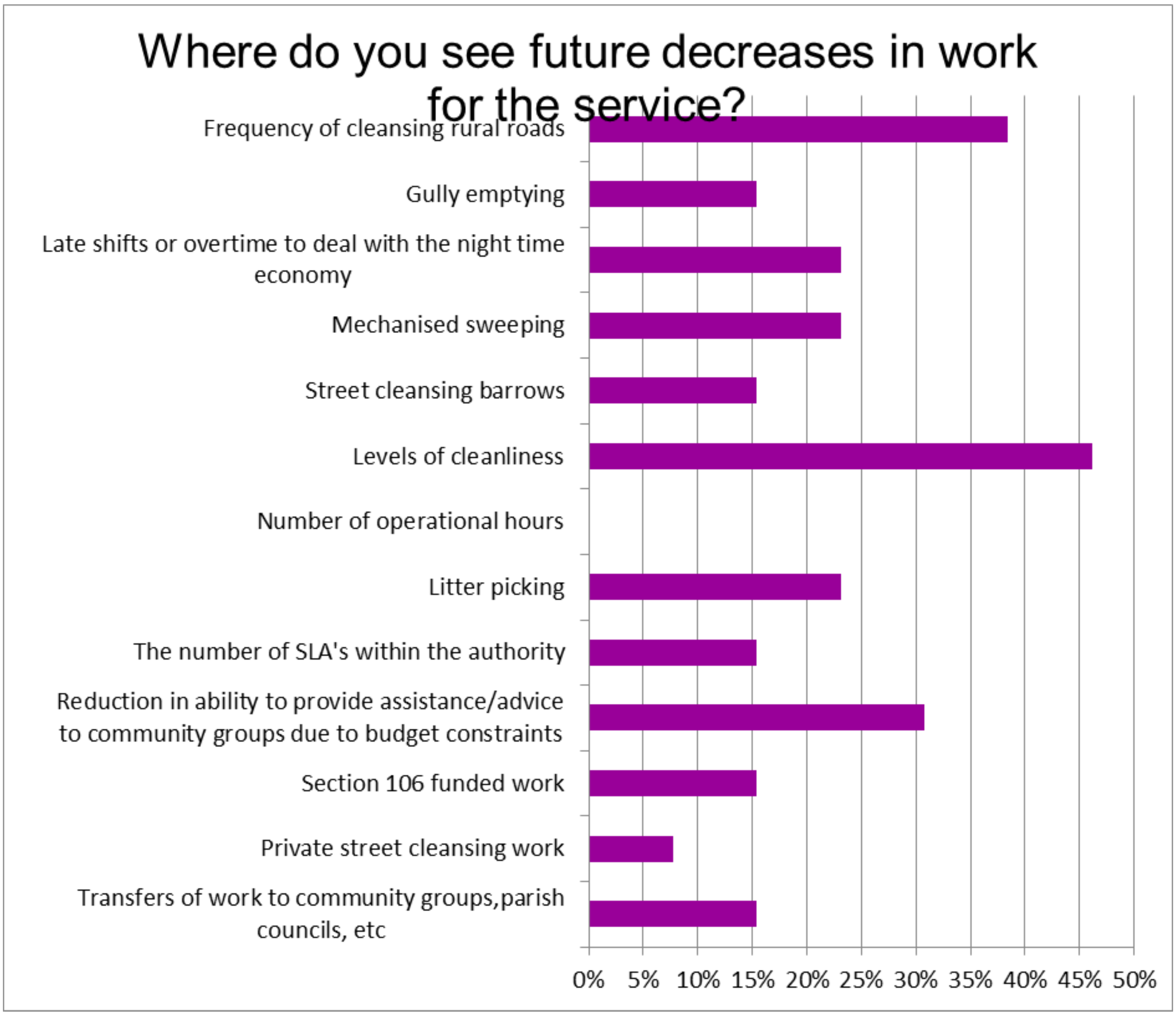
11% 0f respondents thought that the training budget is going to increase over the next 12 months (0% in 2021), with 11% stating a decrease (16% in 2021) and 78% stating that this will stay the same. Training will need to be a key objective of any service, particularly those where staff will need to be multi-skilled as more services consider integration. However, there may be a need to reconsider training needs as a result of the pandemic where staff have been redeployed across a wide variety of service to ensure future proofing of key services and the rise in those expecting increased training budgets in 2022 may be a reflection of this realisation.

i) Future areas of work and service reviews

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:-

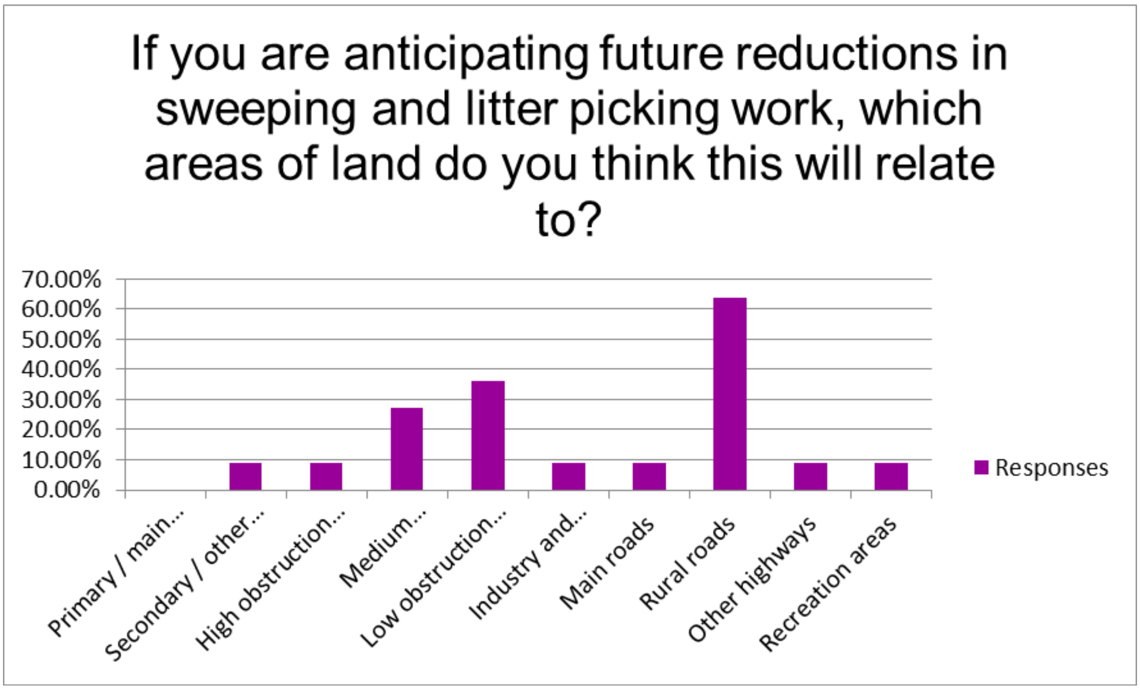


Results show that the areas of growth which have increased the most over 2021 figures, tend to be around dealing with fly-tipping and sustainable electric sweepers. Other areas also showing increases are more litter and recycling bins and providing income generation services. Work with community volunteers and carrying out enforcement have fallen, but due to social distancing measure still being in place these reductions are perhaps not surprising.



The two areas where people are expecting reductions are in the levels of cleanliness and the ability to support community groups, which probably has a clear link.

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: -



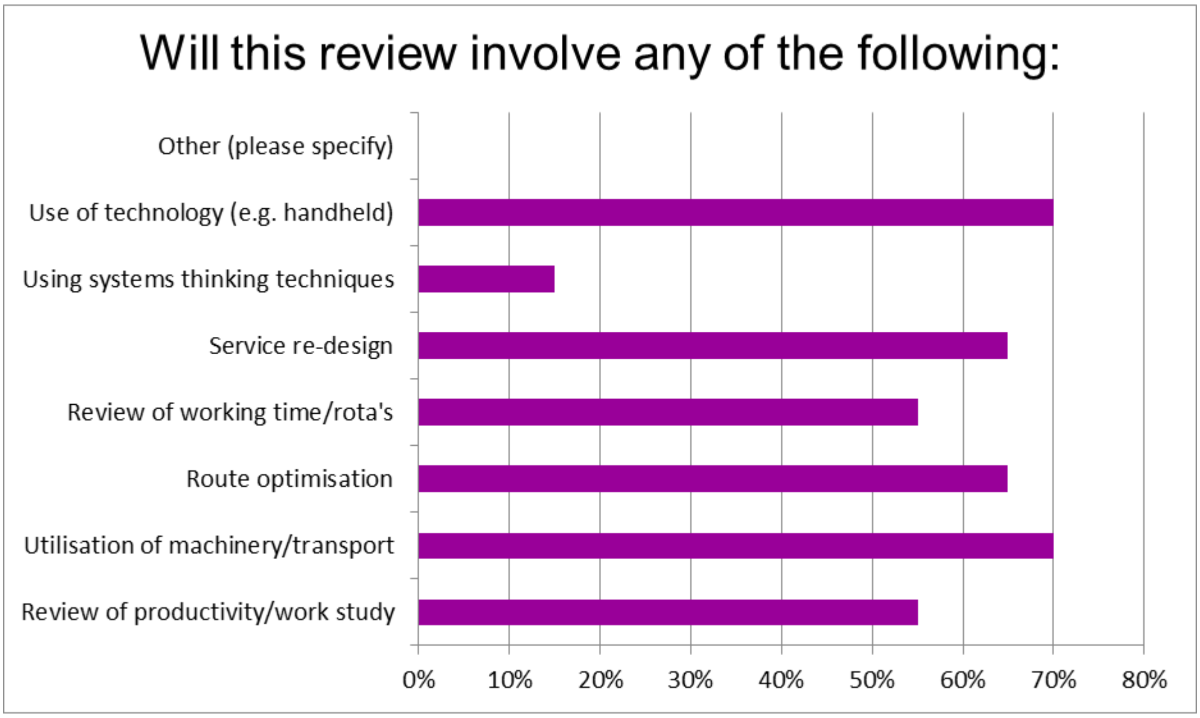
Unsurprisingly the sweeping of rural roads is always a main area where reduced frequencies may occur but for the first time, we are seeing reductions in frequencies of sweeping for low and medium obstruction housing being recorded, which again may link back to increased expectations that street cleanliness levels will reduce as highlighted in the previous graph.

j) Service Reviews

When asked if respondents had undertaken a service review recently, 30% stated that they had completed this (22% in 2021), 40% stated that they have a review which is underway (34% in 2021) and 30% stated that they will be doing so in the next 1-2 years (25% in 2021). No respondents said 'no' they were not intending to undertake a service review.

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

Undoubtedly the Coronavirus pandemic has and is continuing to affect services across local authorities including street cleansing, though services are now moving back to some level of normality.

The redeployment of staff and the cessation of many community events and projects and educational initiatives have clearly affected this year's returns. Uncertainty about how council budgets, and by association street cleansing budget, will fare over the next 12 months, will have filtered through into some of the responses, both actual and perceived, and as such certain elements within this year's survey will have been different to those expected.

It is quite clear that despite a level of ongoing service budget pressures and the impact of the pandemic, managers and front-line staff are continuing to provide efficient street cleansing services. However, there is a real risk that service quality could diminish as a result of those ongoing pressures, which may include changes to cleansing frequencies, the need for investment and the impact of the pandemic

However, from the results received this year, there does appear to be some hope, with the levels of cuts anticipated being smaller and a high proportion of responding local authorities stating they expect budget increases, although not in the next 12 months due to short-term financial pressures caused by the cost of the pandemic.

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 changes to local government finances have led to reductions in overall revenue support grant, councils are increasingly reliant upon business rates and council and other local forms of income; therefore 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 and developers.

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. In addition, as stated previously, the level of cuts anticipated does seem to be lesser than initially expected, most falling under 10%.

Despite these rays of hope this does not mean there is room for complacency and service managers will need to continually monitor and review their services if they are to continually improve. Certainly, from a public policy perspective services which improve the quality of local neighbourhoods are extremely important to the general public. This was once again made abundantly clear within the findings of APSE's 2021 Public Perceptions Survey carried out by Survation, showing that street cleansing was one of the most highly regarded services by UK residents.

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 those 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' and not a 'replacement for' local authority services.

Despite the effect of the pandemic and ongoing budget pressures, there appears to be optimism that services will recover and future budgets, beyond the next 12 months, will support these improvements.

The positive and innovative work local authorities are continuing to deliver in their desire to create cleaner, greener and safer local environments carries on unabated, and it should also be recognised that the staff delivering these services must be recognised, not only for the support they have provided to other services over the last twelve months but also for the role they have carried out in supporting local communities.

Finally, it is hoped that some of the first glimmers of service re-investment taking place will continue to grow and the future performance of service delivery improve to mirror this investment.

APSE member councils can sign up to APSE's free advisory group on Waste, Refuse and Recycling and Street Cleansing using this link.

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 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 network
- 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 and Trading Standards

Visit www.apse.org.uk for more details.