



# ST ALBANS BID

COMMERCIAL WASTE REVIEW

## KEY FINDINGS



A significant part of St Albans BID's members experience issues with their commercial waste collection. Of the levy-payers:

- 25% are unhappy with their waste collection service
- 42% have experienced issues with the reliability of their waste collections
- 47% have others disposing of waste in their bins.

General waste and cardboard are the largest commercial waste streams in St Albans. 92% of the businesses currently have their general waste collected, and 55% of the businesses have a cardboard collection. 34% of the businesses require a separate cardboard collection though do not currently have one.

Many businesses have concerns about the commercial waste negatively affecting the streetscape in St Albans:

- 92% think St Albans Streetscape is influential to their business
- 85% think that the bags of commercial waste on the streets in the BID-area are ugly to look at
- 77% think that the commercial waste bins on the streets in St Albans are ugly to look at

An improved commercial waste service for St Albans would primarily need to be more reliable. Additionally, the waste collection process needs to be the same or better suited to its clients. Furthermore, businesses would like recycling to be facilitated and the dumping of rubbish in commercial waste bins to be prevented.

To improve the commercial waste services in St Albans businesses will need to take action. A large percentage of the businesses seems willing to do so. Amongst the BID-members:

- 79% are interested in a joint procurement for commercial waste services in St Albans, reducing bins on the streets and reducing waste to landfill, following Winchester's example.
- Of these businesses, 49% are interested in a similar scheme as long as it is no extra work for them, and 30% said they are interested and happy to coordinate such a scheme with others.

Finally, there are key requirements for the improved commercial waste services. Primarily the services need to be offered at equal or reduced costs compared to the current situation. Additionally, the services must include general waste and food waste collections as well as cardboard, glass, and dry recycling collections. Of equal importance, is that both weekly collections and smaller daily collections are offered, to accommodate businesses with and without waste storage.

# TABLE OF CONTENTS

Introduction

Research methodology

Bin audit

In-depth interviews

Stakeholder interviews

Survey

Current waste services

Market share waste providers

Waste collection streams

Waste collection costs

Happiness with waste collection service

Happiness with waste collection process

Issues with waste collection

Street scene

Importance to businesses

Bin audit

Environmental impact

Waste collection

Waste handling

Improved waste services

Waste streams

Most valued waste service qualities

Most popular improvements

Ideal frequency

Willingness for change

Joint procurement

Pay exit fee

Carrying waste

Key requirements commercial waste services St Albans

# INTRODUCTION



St Albans Business Improvement District (BID) was established in 2016 with a commitment to improve the conditions of the streets in St Albans and the ambition to make it easier for members to do business. In 2017 St Albans BID learned many BID members were experiencing issues with their commercial waste and recycling services. Problems included the irregular and unreliable waste collections and the lack of recycling options.

To help its members get improved commercial waste services, St Albans BID approached Hubbub. Hubbub is an environmental social enterprise that takes a solution-oriented approach to tackling environmental issues. Hubbub avoids doom and gloom and proposes positive, collaborative and actionable solutions, led by research insights.

Together St Albans BID and Hubbub defined the following problem definition: ‘How can St Albans BID can best help its members get improved commercial waste services, which enhance the street scene and reduce environmental impact?’.

This report presents Hubbub’s research findings so far, including an analysis of the members’ current commercial waste services and the key requirements for improved commercial waste services. Following the publication of this research report, Hubbub will research models of best practice elsewhere and identify examples of forward thinking on waste management. Based on this first research piece, and following research, Hubbub will then create a report outlining recommendations for an alternative commercial waste and recycling model for St Albans.

This paper begins in Chapter 2 by giving an overview of the chosen research methodology. Then in Chapter 3 a comprehensive view of the current commercial waste services is provided. This is followed by an assessment of the service impact on the city’s street scene, and the environmental impact of the service. Following this, Chapter 6 presents the most popular service improvements levy payers would like to see. Thereafter, in Chapter 7 the willingness to change amongst members is explored, and finally, Chapter 8 lists the key requirements for future commercial waste services in St Albans.

# RESEARCH METHODOLOGY



To answer the problem definition ‘How can St Albans BID best help its members get improved commercial waste services, which enhance the street scene and reduce environmental impact?’, Hubbub first worked with a King’s College London PhD researcher to develop a research framework and methodology.

We needed to understand the commercial waste and recycling services in St Albans, and especially how they impact the street scene and their environmental impact. We opted to undertake a bin audit, interview BID members, interview stakeholders and create a survey for distribution amongst BID members.

## BIN AUDIT

We mapped the placement and density of commercial waste bins visible from public spaces in the entire BID area.

## IN-DEPTH INTERVIEWS

To gain insights into the commercial waste services in St Albans, we spoke briefly to employees of nineteen businesses. With the insights from these short conversations, a set of questions was crafted for in-depth interviews with levy payers. Thirteen business owners were interviewed in-depth.

To reflect the total population of BID members, the interviewees represented:

- A geographical spread across the area. We included businesses on George Street, Market Place, Adelaide Street and Honeywell Hill - areas pointed out by St Albans BID as particular problem areas regarding commercial waste.
- The different business sectors. Depending on the percentage of BID members in a certain sector, we chose a corresponding number of businesses to interview. We spoke to five retail businesses, three hospitality businesses, three high street services, one business in the category ‘business and technology’, and one public service organisation.
- Businesses with small, medium and large waste management contracts, including the City Council, the Maltings, Christopher Place, as well as small shops.



## STAKEHOLDER INTERVIEWS

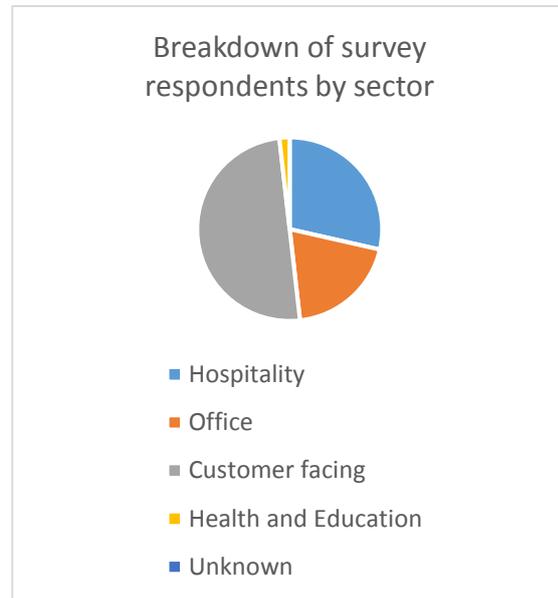
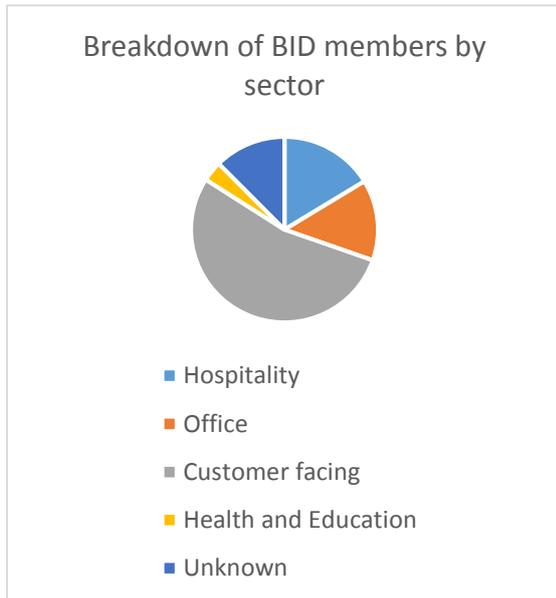
Hubbub and St Albans BID mapped the stakeholders relevant to the commercial waste services in St Albans. After this exercise we chose to interview two additional stakeholders: St Albans City Council and Hertfordshire County Council. Other stakeholders were informed of the project.

## SURVEY

Based on the findings of the in-depth interviews, a shorter online survey was crafted to get feedback from a larger sample of levy payers. Questions were tailored to confirm insights from interviews or seek further information to questions that came up during interviews.

300 BID Businesses were requested by email, printed letter, telephone call and in-person to undertake the survey. At least 70 businesses in the BID area form part of the larger organisations e.g. Maltings or Christopher Place where their waste contract is included and therefore were not in a position to comment or seek to address their contract. Further, many of the nationals are not able to influence, or often don't know, the waste management decisions of their head office or were not inclined to participate.

In total, St Albans BID has 532 levy payers. The majority of levy payers fit into one of three groups: customer-facing businesses (such as retail and hairdressers), offices and hospitality businesses. As visualised in the graph below, just over half the BID's members are customer-facing businesses, a sixth are offices and a sixth are companies in the hospitality sector. Amongst the survey respondents the three largest business segments were well represented. Graph II shows the break-up of the survey respondents into business sectors.



Throughout this research report, we are confident that the answers of the 53 respondents are close to the opinion of the BID membership as a whole. The methodology used by our researcher states that to have 95% confidence that the sentiment of the total member population is within 10% of the survey results we would need 82 responses to the survey. In reality, 53 respondents filled in the survey, providing us with 95% confidence that the results are within 12% of what St Albans BID's levy payers think, which we believe is an acceptable margin.

Where the survey answers are broken down by sector, we cannot be as certain the results represent that sector in full due to the small sample size. In the case of the customer-facing businesses, the confidence rate is relatively high; the number of offices and hospitality businesses who filled out the survey is much lower. With eleven and sixteen respondents representing seventy-six and eighty-eight businesses respectively these results are less reliable.

The respondents included both larger and smaller organisations and chains as well as independent shops. They were located throughout the BID area, including in the Cathedral Quarter.

## CURRENT WASTE SERVICES

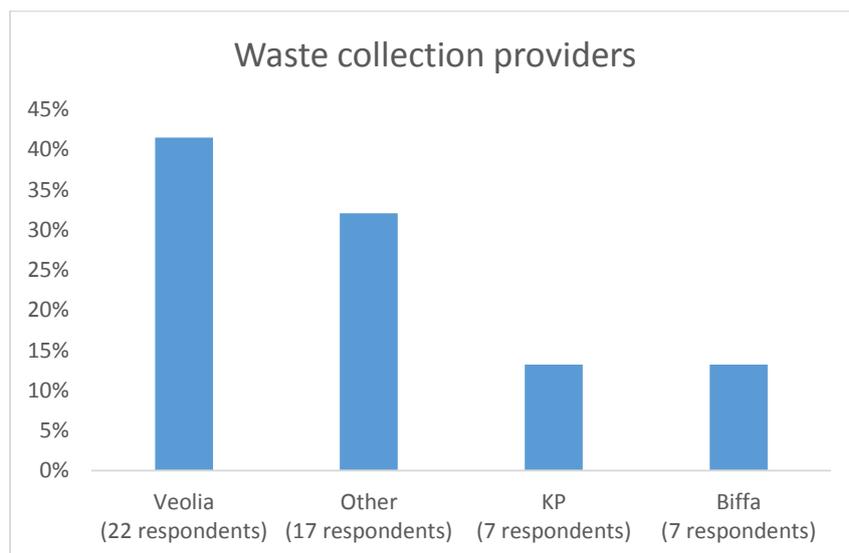
To propose improved commercial waste services, it is crucial to understand the current offer. Which providers are in the market and what is their share? What services do they provide, at what cost? How happy are their customers? Where is the greatest demand for improvement? This chapter shows the questions we asked and gives an overview of current commercial waste services in St Albans.

### MARKET SHARE WASTE PROVIDERS

A small majority of the BID's levy payers are part of a chain. These businesses, and those within the shopping centres, cannot choose their own waste providers. Due to a selection bias, 59% of our survey respondents said they were able to choose their own waste provider.

When asked about their waste provider, 42% of the respondents said they were with Veolia - giving Veolia the largest market share of commercial waste services in St Albans. Biffa and Veolia both have around 15% of the market. The remaining third of businesses are either with another provider such as Cawleys, Sparkle Waste, Clear A Waste or Suez, did not know who their waste provider was, or did not have a commercial waste provider.

8% of the businesses in St Albans are without a commercial waste contract even though every business has the legal responsibility to legally dispose of any business waste produced. This means that businesses that do not have a licensed waste carrier picking up their commercial waste, and can't show 'waste transfer notes' for disposing of their waste are at risk of prosecution.





## WASTE COLLECTION STREAMS

There are eight significant types of waste collected in St Albans. The chart below shows what percentage of survey respondents pay for each type of waste and recycling service. For example, 25% of businesses have a food waste collection.

The hospitality sector is responsible for two thirds of the glass waste, half of the food waste, and all of the cooking oil waste. The offices are responsible for over half of the toilet bin waste.

One out of ten businesses do not have a waste collection service at all, and a quarter of the businesses only have general waste collection and no other recycling streams.



## WASTE COLLECTION COSTS

Of the 53 respondents, 36 provided us with their monthly waste collection costs.

Consumer-facing businesses and offices had quite similar waste cost. Customer facing businesses have a median cost of £50, based on 15 respondents. The median waste cost for offices is £52 a month, this data is based on eight businesses providing information. The median cost for hospitality businesses is £300 a month and this is based on 13 businesses.

## HAPPINESS WITH WASTE COLLECTION SERVICE

When the levy payers were asked if they were happy with their current waste collection service, 45% said they were happy or very happy. 30% said they were indifferent, and 25% said they were unhappy with their waste collection provider.



Looking at the happiness per sector, there is a significant difference between the groups. Around a quarter of customer facing and hospitality businesses are unhappy with their waste provider, and amongst the offices, only one out of ten businesses is unhappy.

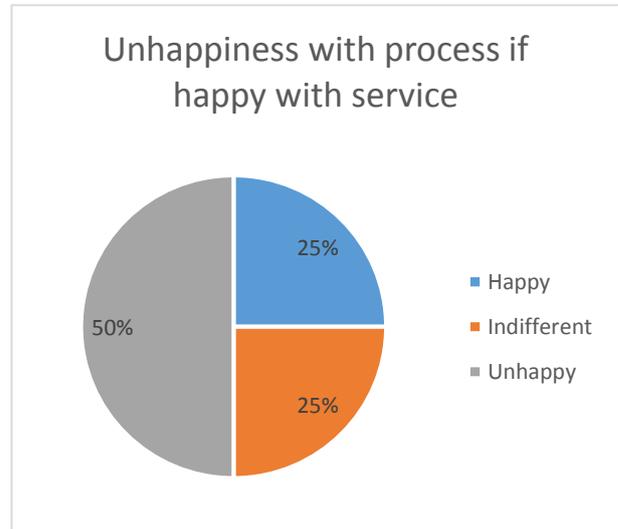
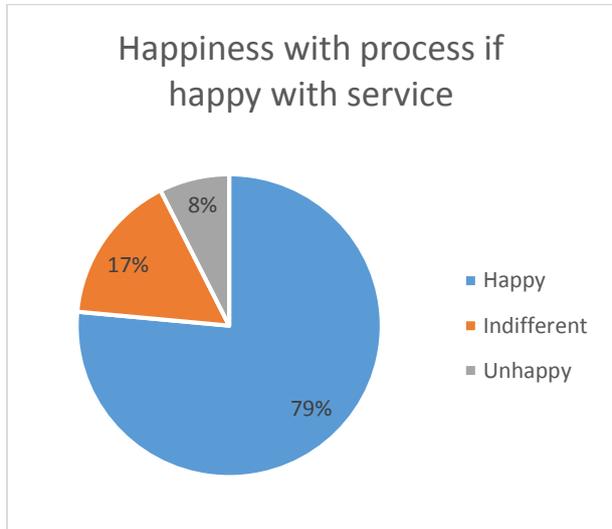
## HAPPINESS WITH WASTE COLLECTION PROCESS

The businesses also reviewed their happiness with their waste collection process, i.e. their happiness with where they store their waste and how they prepare it for collection.

The results were very similar with 45% responding they were happy or very happy, 32% being indifferent and 23% unhappy.



The businesses' happiness with their waste collection service is strongly correlated to their happiness with their waste collection process: of those who were happy with their service, 79% were also happy with their process; of those who were unhappy with their service, 50% were unhappy with their process.

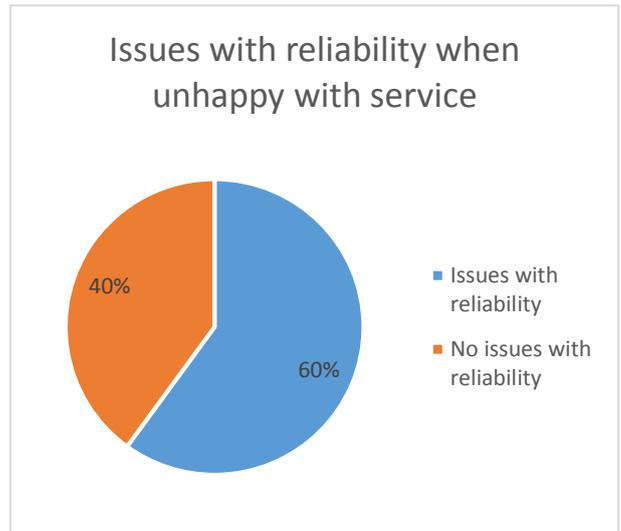
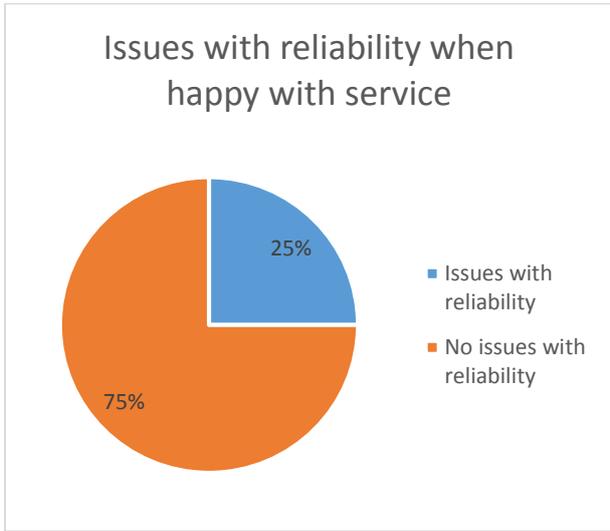


## ISSUES WITH WASTE COLLECTION

Problems businesses encounter with their waste collection are reliability of their waste collection, others disposing of waste in their bins, and receiving complaints regarding their waste concerning, for example, noise or smell.

42% of the businesses have experienced issues with the reliability of their waste collection. This is especially high amongst offices with 73% strongly agreeing with the statement, as compared to 44% of the hospitality businesses, and 32% of the consumer facing businesses.

Reliability is strongly correlated with happiness of service, and with happiness of process. Of those who were happy with their service, 75% have no issues with reliability. Of those who are unhappy with their service, 60% has issues with their service reliability.

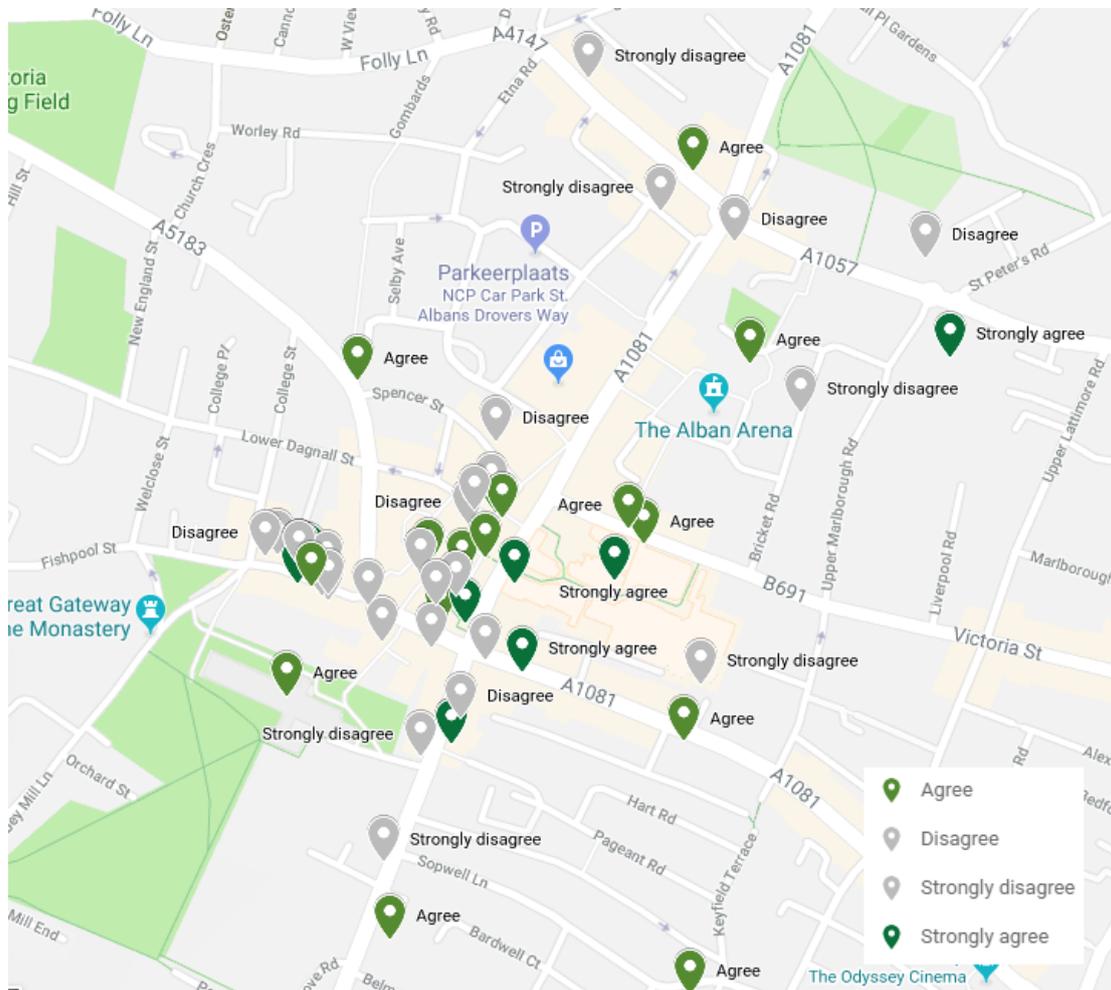


47% of the businesses have had issues with others disposing of waste in their bins. None of the offices encounter this problem but 57% of the hospitality and 50% of the customer-facing businesses do.

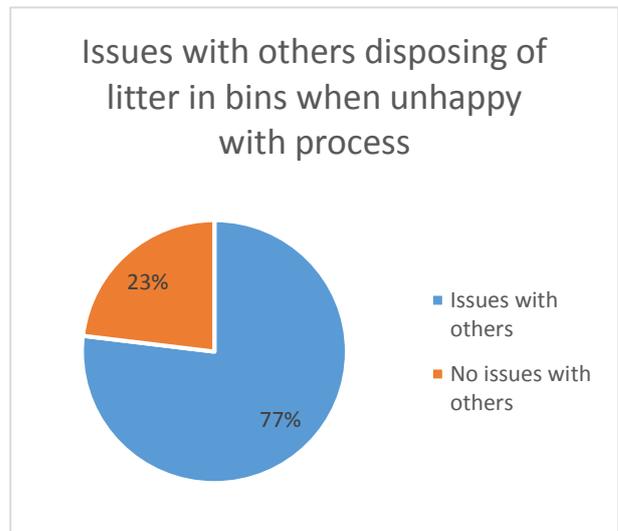
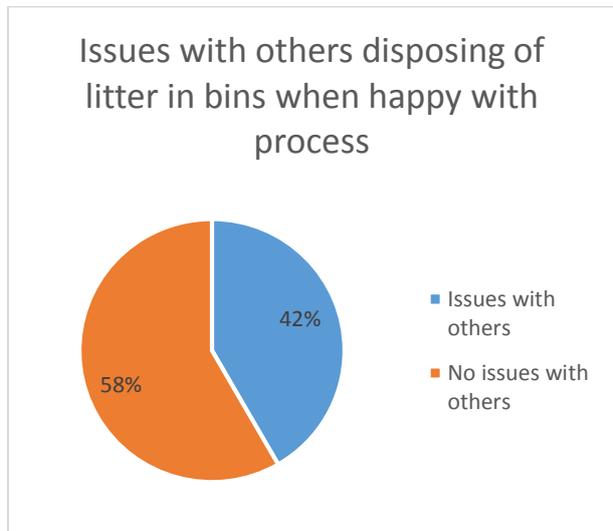
Others dumping waste in the businesses' bins is a serious issue since it shows a correlation to the happiness with the waste collection process.

The problem is most prominent in and around the Market Place. On other streets, some businesses have the problem of others disposing waste in their bins, and their neighbours do not.

The map underneath shows businesses who agree with the statement 'others dispose of waste in my bins' in green, and the organisations who strongly agree in dark green. The grey dots on the map represent the businesses that filled in the survey, but disagreed or strongly disagreed with the statement.



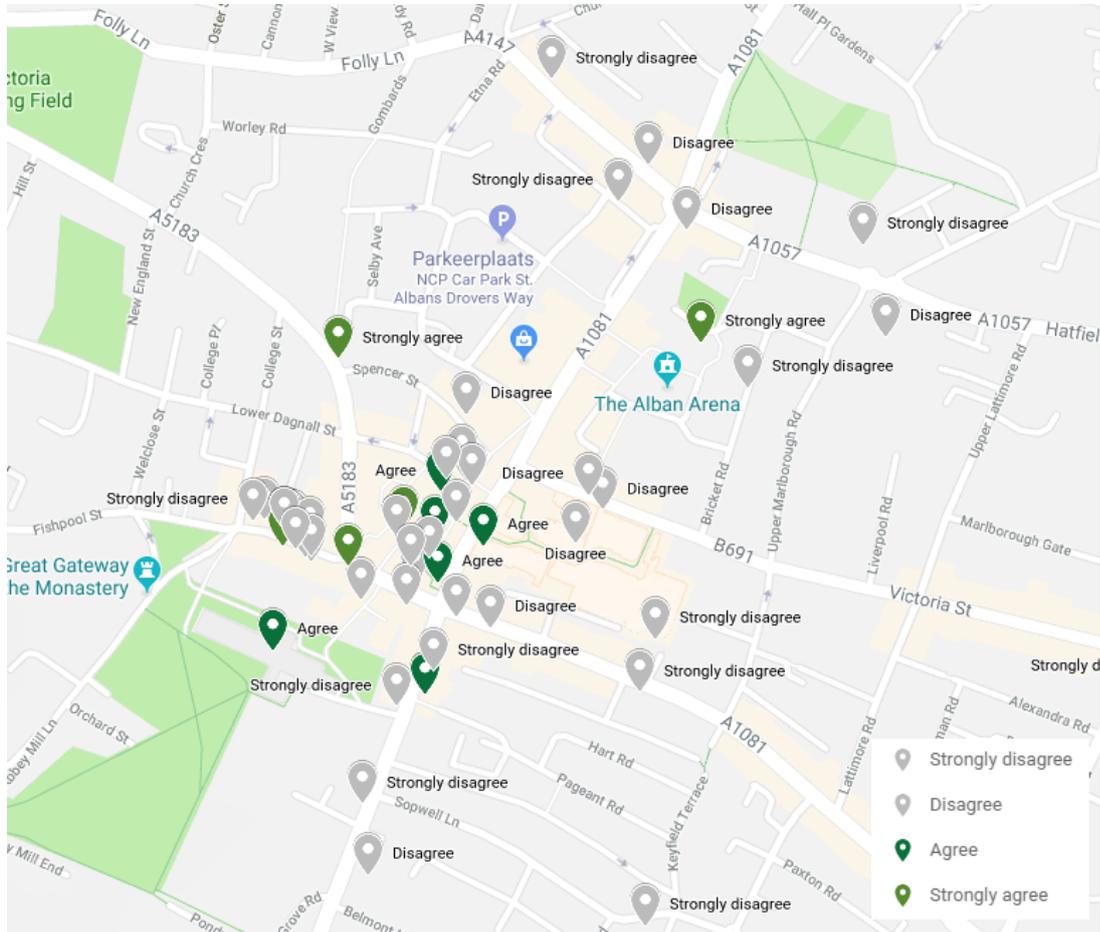
Of the businesses who are happy with their waste collection process, 58% do not have issues with others dumping waste in their bins. Of the organisations who are unhappy with their waste collection processes, 77% have had issues with others disposing of waste in their commercial waste bins.



19% of the businesses have received complaints about their waste, such as noise or smell. This percentage is about the same for all sectors. The data shows no correlation between receiving of complaints and businesses' happiness with their waste supplier or their waste process.

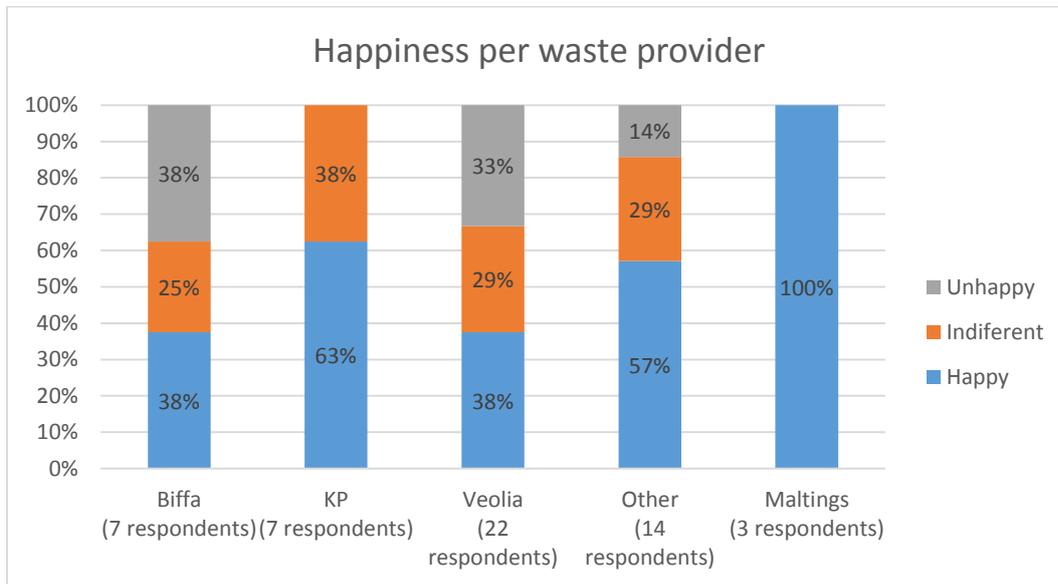
Geographically, the complaints regarding seem to be a concentrated around Cathedral Quarter.

The following map shows businesses who agree or strongly agree with the statement 'I have received complaints about my waste e.g. noise, or smell' in green and dark green, and again the grey dots on the map represent survey respondents who do not agree with the statement.



Analysing the happiness with commercial waste services in relation to waste providers, we find that amongst the 22 businesses with Veolia, almost half are unhappy. Amongst the seven businesses with Biffa, half are unhappy, and out of the seven respondents with KP a much larger percentage is happy, and no one is unhappy.

We do not have enough data to be able to say whether Cawleys and the other waste providers with a smaller market share generally have happy customers.



# STREET SCENE



## IMPORTANCE TO BUSINESSES

In the in-depth interview we found that businesses in St Albans are not too concerned about trucks driving through the streets. Reducing trucks to improve street accessibility or air quality in the urban center were not amongst the high ranked improvements to the street scene levy payers would like to see as a result of this study.

Fewer visible commercial waste bins and fewer bags of commercial waste on the streets were prioritised over the minimization of trucks.

92% of the businesses in St Albans think St Albans streetscape is influential to their business. When asked 'How influential do you think St Albans street scene is to your business' 57% said it is very influential, and 36% said it is somewhat influential.

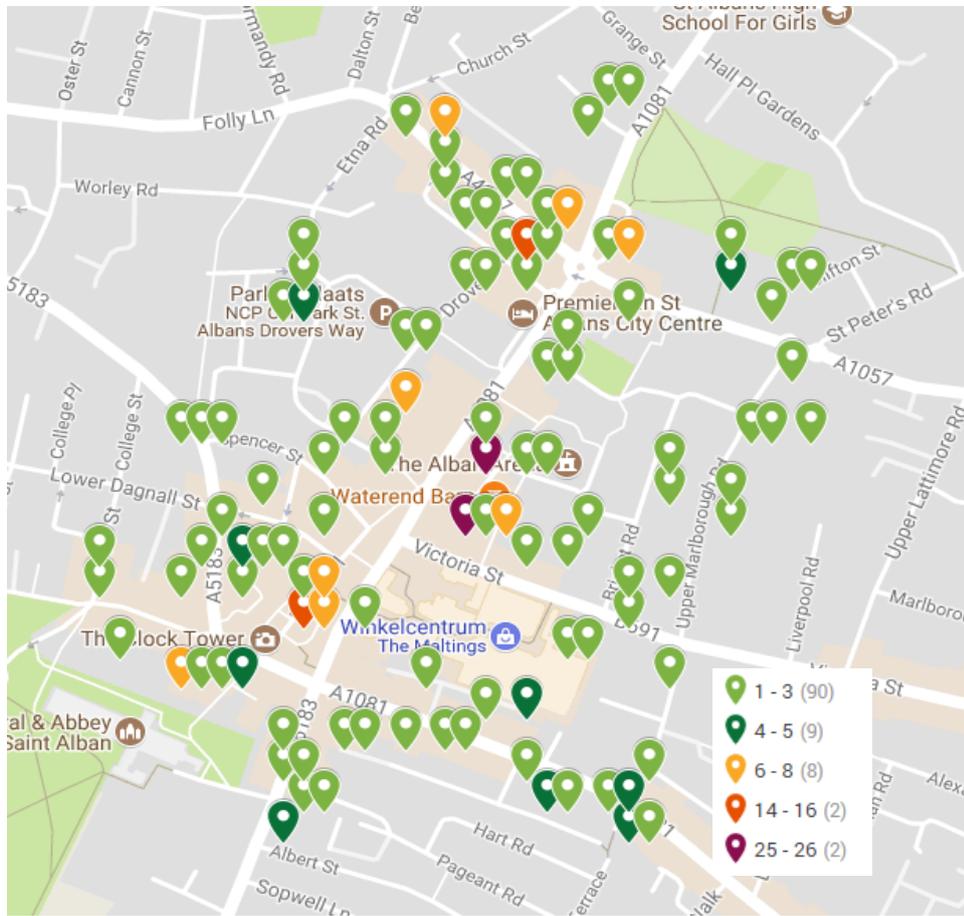
## BIN AUDIT

Via a bin audit we mapped all commercial waste bins in St Albans BID area, visible from public land. We located 363 bins.

The map underneath shows where these bins are located, and shows the number of bins on locations. There are many single or small collections of bins dotted all around the area. These are portrayed by light green markers in the map. The dark green markers show collections of 4-5 bins. The yellow and orange markers signify a collection of 6-16 bins on one site, and finally, the purple dot shows the largest population of over 25 bins on one site.

Not all the yellow, orange or purple markers are an eye-sore. The yellow and purple markers besides the Slug and Lettuce for example, as well as the bins next to the Waterend Barn and behind the post office are either sheltered from direct sight, or on a back road.

The two large collections of bins visible from the streets are next to the Boot, between Market Place and Pudding lane, and on Adelaide street. Furthermore, businesses complain about the motley collection of commercial bins. Several businesses expressed discontent with the commercial waste bins as they have many different colors, are quite bright, and dotted all around town.



# ENVIRONMENTAL IMPACT



The environmental impact of St Albans commercial waste services can be broken down in the waste collection and the waste handling.

## WASTE COLLECTION

To review the number of different waste contractors driving through St Albans on a daily base we asked businesses to list their waste providers and collection days.

The 53 survey-respondents use seven different waste collection providers. On Monday and Thursday five different businesses drive through St Albans picking up waste, on Tuesday, Wednesday and Friday four businesses come and collect waste, on Saturday three different businesses drive through St Albans for waste collections, and on Sunday two businesses.

**DAYS OF THE WEEK**

	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY	SUNDAY
WASTE BUSINESSES	Biffa						
	Cawleys						
	Veolia						
	KP						
	Suez						
	Clearawaste						
	Sparklewaste						

The impact of these collections on the environment depends on the number of trucks driving through St Albans per day, the routes the trucks drive, and their CO2 emissions. We did not calculate the trucks emissions since this data is different for each waste collection provider, and even each truck.

We do know that the air quality in St Albans is good overall, although the annual mean AQS objective was exceeded in St Albans in 2017 in four locations of which three are in the BID area: St Peters Street, High Street and Holywell Hill.



At these three locations, where Holywell Hill and London Road join up, the NO<sub>2</sub> levels have been exceeded. The pollution may be caused by a number of factors beyond waste management, including buses, high concentration of tall buildings, traffic lights requiring long idling traffic and poor execution of hill starts by accelerating vehicles. We can't be sure a reduction in commercial waste vehicles driving through St Albans, or a switch to electric vehicles by commercial waste providers, would significantly improve the air quality at these three locations.

## WASTE HANDLING

Another way to reduce the environmental impact of the commercial waste services is by increasing recycling.

As described earlier in this report almost all businesses have their general waste collected, a majority have cardboard recycling, a third have dry recycling and glass recycling, a quarter have food waste recycling and a collection for toilet bin waste, and a fifth have their confidential paper collected separately.

27% of the businesses do not currently recycle, and 38% of the businesses say they do not produce any waste items that merit a special collection but does not currently have one.

The majority of businesses would like to recycle more. Of these businesses, 34% say they would benefit from a cardboard collection, 11% desire a separate food waste collection, 9% would like to have glass recycling, another 9% requires confidential paper recycling and six percent would prefer to have a separate waste stream for toilet bin waste.

Facilitating businesses to increase their recycling would increase their happiness with the waste collection service.

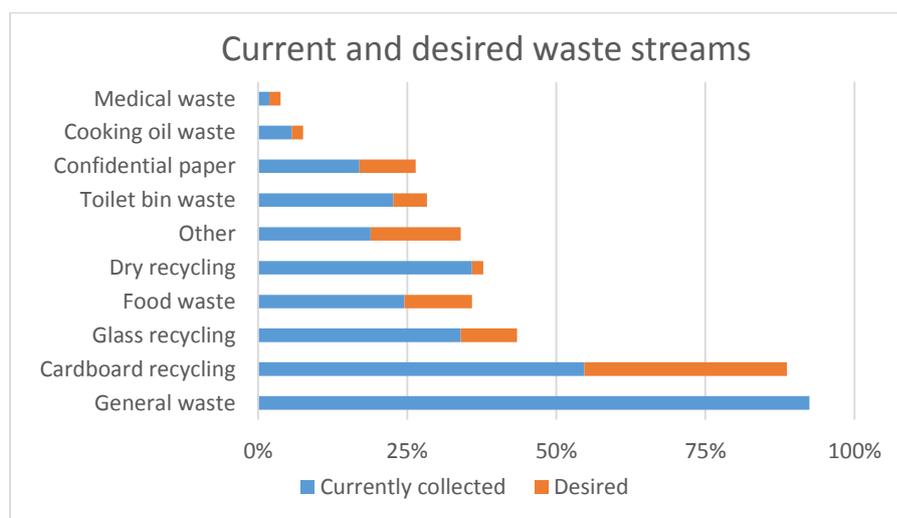
# IMPROVED WASTE SERVICES

To assess what improved waste collection services look like we asked the businesses whether they have waste streams which merit a special collection but currently do not have one, what qualities they value in commercial waste services, and what improvements they would like to see made to their waste services.

## WASTE STREAMS

Three out of ten businesses only have a general waste stream, and do not recycle. When asked “Does your business produce any waste items that merit a special collection but does not currently have one?” 38% of the businesses said no, 34% said cardboard, 15% said other (this included collections for sharps, paint-tins, cartridges and garden waste) 11% requires food waste, 9% would benefit from a glass waste collection, and another 9% would benefit from a confidential paper collection.

The graph underneath shows current waste streams of businesses in blue, and desired waste streams in orange. It is clear from our data that the immediate opportunity is in offering a cardboard collection as it is a significant waste stream and has a large unfulfilled demand for collections.



Analysing the desired waste streams per business type there are some clear differences. 50% of customer facing businesses would like separate cardboard recycling, 23% would like confidential papers to be picked up, and 18% would like their glass recycled. Amongst the offices, 60% would prefer separate cardboard recycling, 20% would like confidential papers collected separately and 20% their toilet bin waste. Within the hospitality sector 38% would like a separate cardboard collection and 31% would like a separate food waste collection.



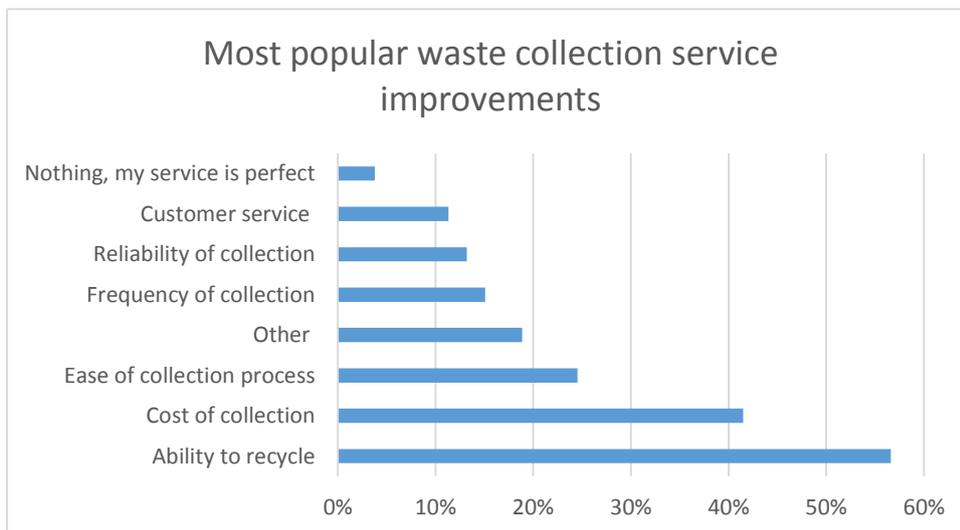
## MOST VALUED QUALITIES

The most valued quality in a waste collection service is reliability of collection. Cost, ease of process, ability to recycle and collection frequency follow in that order.



## MOST POPULAR IMPROVEMENTS

When asked which areas of their current waste collection service the businesses would like to see improved the ability to recycle was number one, followed by the cost of collection and easy of collection process.

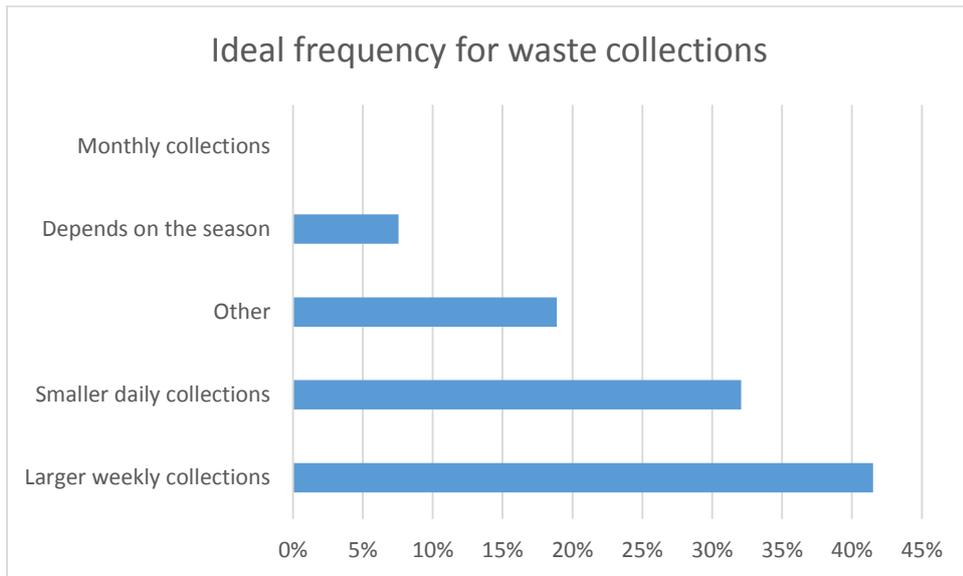




## IDEAL FREQUENCY

When asked ‘Irrespective of cost, what would be the ideal frequency of waste collection for your business?’ 47% of the businesses said they prefer larger weekly collections and 34% need smaller daily collections, this is consistent for all three sectors.

Four businesses said this depends on the season and others include those without waste collection and those who prefer a collection twice a week.

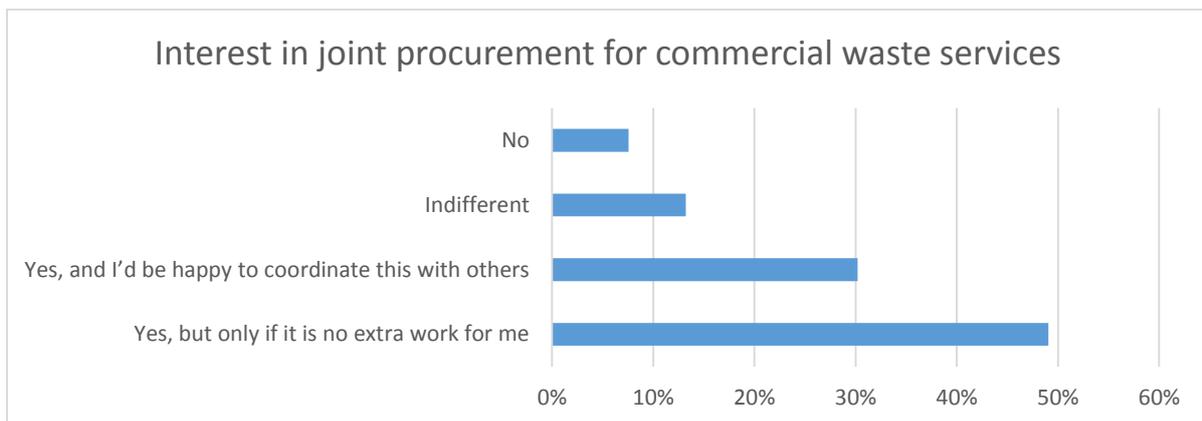


## WILLINGNESS FOR CHANGE

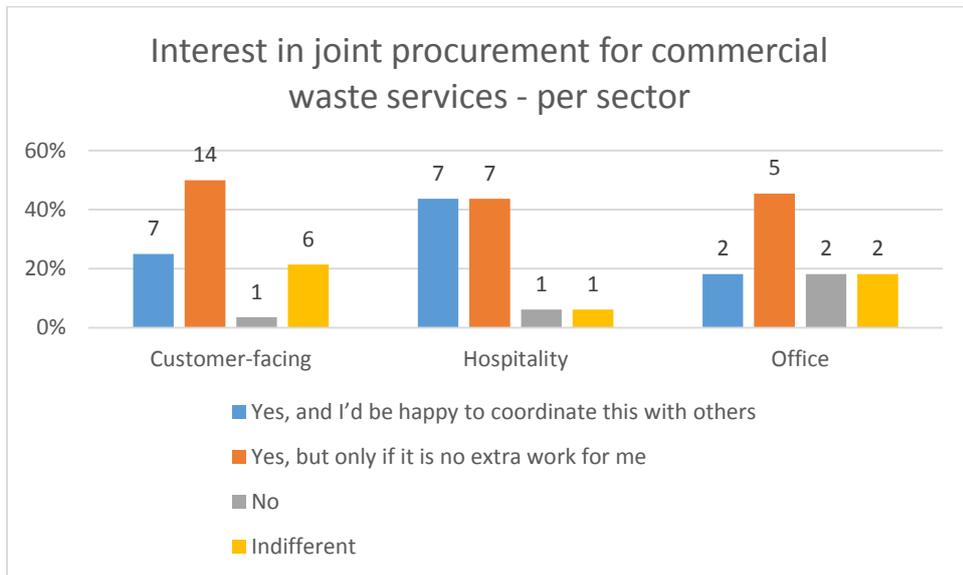
To secure improved commercial waste services in St Albans businesses will need to take action. Whether it is changing contract, joining a joint procurement scheme, increase recycling, or walking further to get rid of the waste. The businesses' willingness to change contracts, and make extra effort to get rid of waste are quite promising amongst all three sectors.

### JOINT PROCUREMENT

Even though 45% of the BID members are happy or very happy with their current waste collection service, 79% said they would be interested in a joint procurement scheme for commercial waste services, like Winchester BID's, reducing bins on the streets and waste to landfill. Thirty percent of the respondents even said they would be happy to coordinate this with others. Only 8% were opposed to joining such a scheme. We feel this is an encouraging sign for St Albans BID's desire to lead change in this area.



When broken down by sector we see that nine out of ten businesses in the hospitality sector are interested, seven out of ten of the customer facing businesses and six out of ten offices. Within the hospitality sector 44% of the businesses are interested, and willing to coordinate this with others. Amongst the offices most organisations are interested or indifferent, though even within this group a majority is interested in such a scheme.



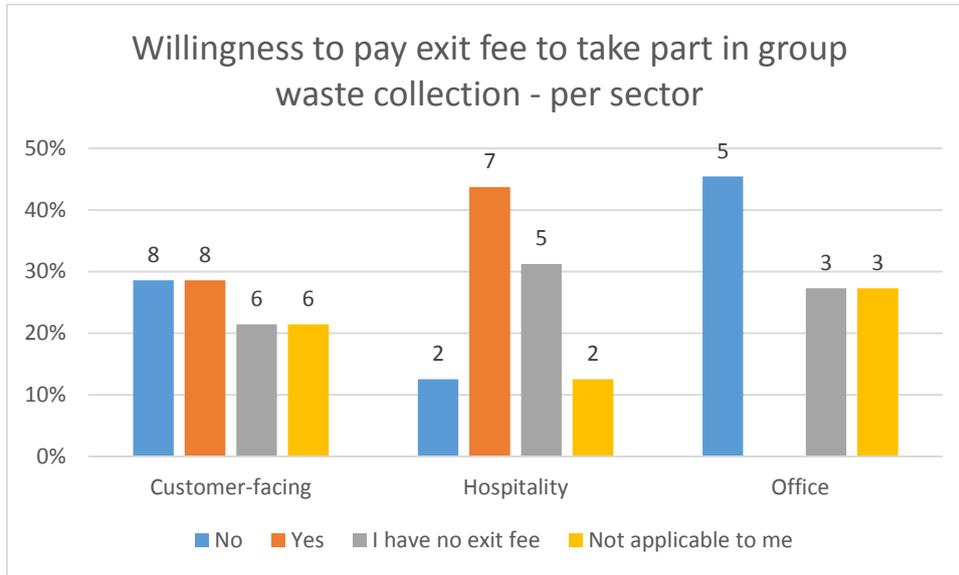
## PAY EXIT FEE

A quarter of the businesses are willing to pay an exit fee to take part in a group waste collection, and the same number are not willing to do so. Another quarter has no exit fee to pay and the last quartile cannot choose their own waste provider.



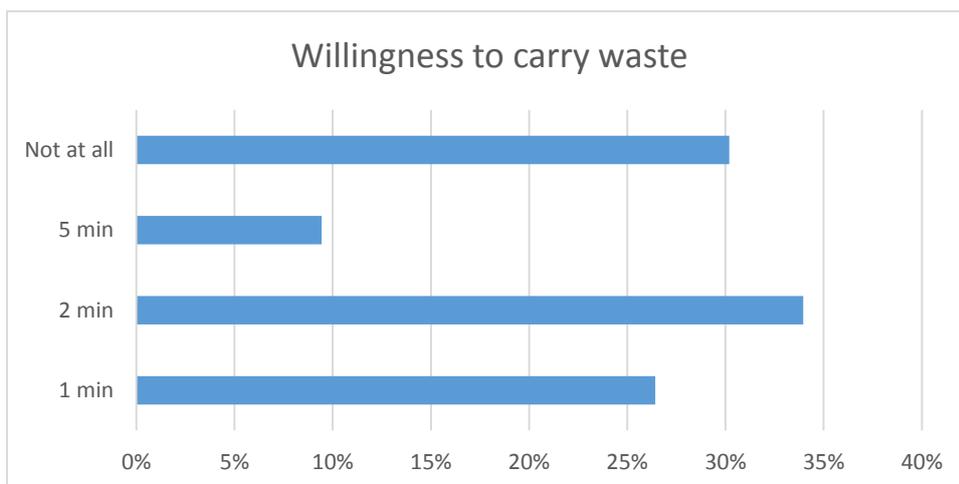


Four out of ten hospitality businesses are willing to pay an exit fee, three out of ten customer facing businesses but not even one out of ten amongst offices. Hospitality organisations might be most willing since they pay the largest amounts for the services, and an exit fee might decrease costs. Or it might be connected to happiness with waste provider, since a quarter of the hospitality businesses are unhappy, a quarter of the customer facing businesses, and only one out of ten offices is unhappy with their current waste collection service.

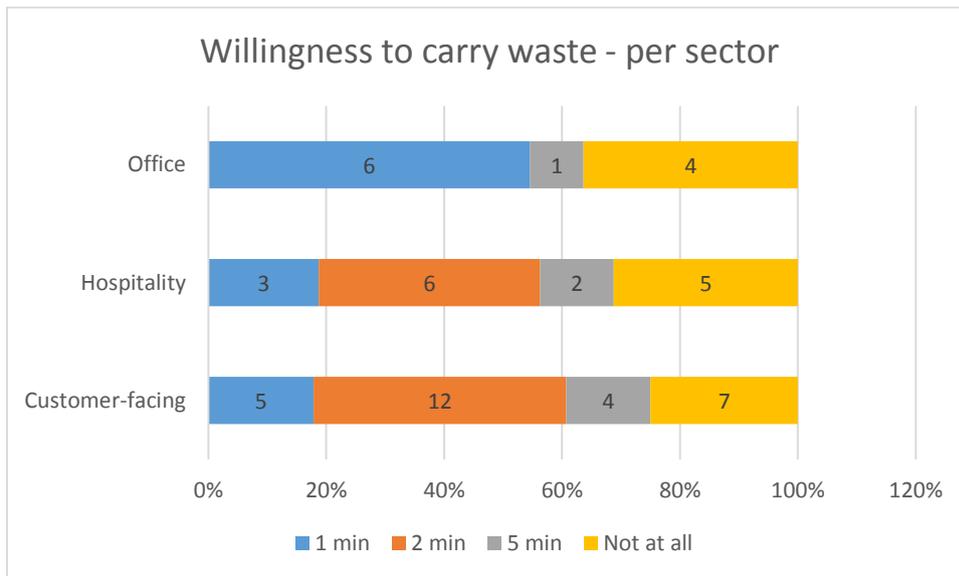


## CARRYING WASTE

In order to achieve joint procurement for commercial waste in St Albans, 18% of the businesses are willing to carry their waste for one minute, 43% are willing to carry it four two minutes, 14% are willing to carry it for five minutes and 25% are not willing to carry their waste at all.



Amongst the offices there is the largest percentages of businesses who are not willing to carry their waste at all, smallest group of people willing to carry it for five minutes, and a small majority willing to carry it for one minute. The customer facing businesses, and hospitality businesses are on more occasions wiling to carry one, two or five minutes. Especially so amongst the customer facing businesses, which is logical as the hospitality sector generally deals with larger quantities of waste, and heavy waste like glass and food waste.



The willingness to carry waste is loosely correlated with the businesses happiness with the process. Those who were unhappy with their process were most likely to be willing to carry their waste the furthest. Those who were happy with their process were unwilling to carry their waste.

## KEY REQUIREMENTS



To help its members get improved commercial waste services, St Albans BID needs to look out for solutions that:

- Increase service reliability
- Maintain or improve the waste collection process
- Facilitate recycling
- Prevent dumping of rubbish in commercial waste bins

Businesses are open to change, and would for example join a joint procurement process, the improved services however, do need to fit the needs of the businesses. Key requirements of the commercial waste services include:

- A service offered at equal or reduced costs compared to the current situation
- Offering at least general waste and food waste collection, as well as cardboard, glass, and dry recycling collections
- Providing both weekly collections as well as smaller daily collections

To serve the different business types in St Albans, as well as businesses with and without storage space flexible waste collection services are needed, by a single waste collection provider or a multitude of providers.