

State of the Market Survey 2021

Local Authority Transport Services



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State of the Market Survey 2020

Local Authority Transport services

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About APSE

The Association for Public Service Excellence (APSE) is a not-for-profit local government body working with over 300 councils throughout the UK. Promoting excellence in public services, APSE is the foremost specialist in local authority frontline services and operates one of the UK's largest research programmes in local government policy and frontline service delivery matters.

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Results at a glance

Vehicles

% utilising Vehicle Tracking Systems	90.20%
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% with an active policy against the purchase of internal combustion powered vehicles	17.65%
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Workload

% expecting the workload of the transport section to increase over the next 12 months	64.44%
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Budget

% whose Fleet service budget has decreased from the last financial year	28.89%
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% expecting the Fleet service budget to decrease for the next financial year	30.43%
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% whose Fleet maintenance training budget has decreased over the past 12 months	20.00%
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Staffing

% offering a salary sacrifice scheme for vehicles for employees	32.00%
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% who personally feel staff absence levels are not at an acceptable level	37.78%
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% who run an apprenticeship scheme	84.44%
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Average age of operational workforce	46.78 years
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Transport

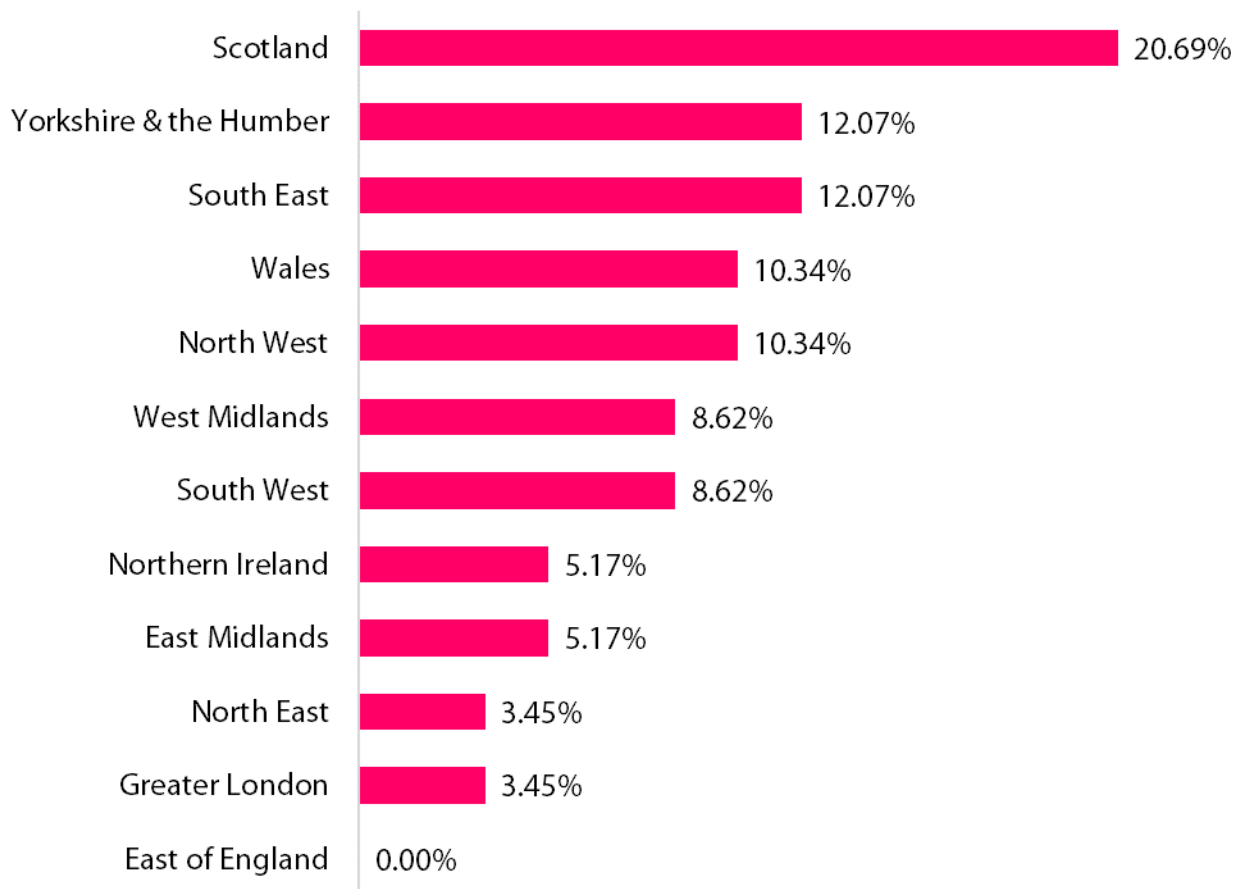
State of the Market 2020

APSE conducted an online survey between November and December 2020. A series of questions were asked covering a range of issues of interest to those officers, managers and councillors responsible for Transport services.

State of the Market surveys are an attempt to understand perceptions of the market amongst people directly involved in delivering services.

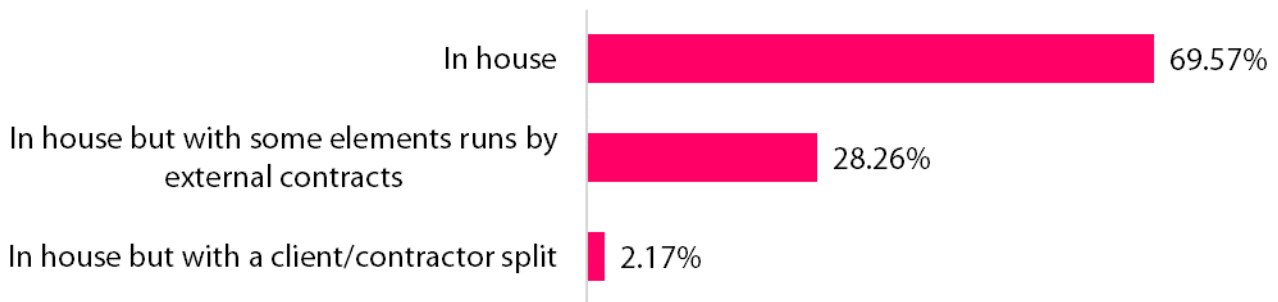
There were 58 responses from local authorities to this survey. None of the questions were mandatory, so the total amount of responses differs from question to question. Individual details of respondents have been kept confidential. Results of the survey should be treated as a snapshot of current opinions of those working in transport services rather than a thorough analysis of change over time.

Where in the UK do you work?



Section 1 - The Service

How are your Fleet services currently delivered?



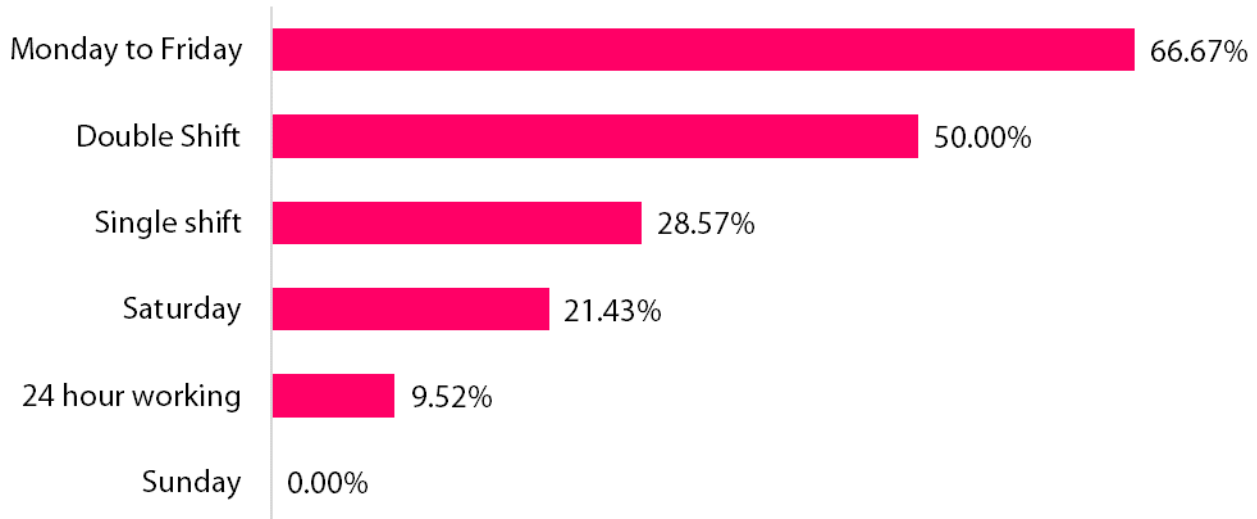
69.57% of Fleet services are delivered in-house, 28.26% are delivered in house but with some elements run by external contracts and 2.17% are delivered in house but with a client/contractor split.

If the service is currently provided in-house, do you expect the service to remain in-house over the next 12 months?



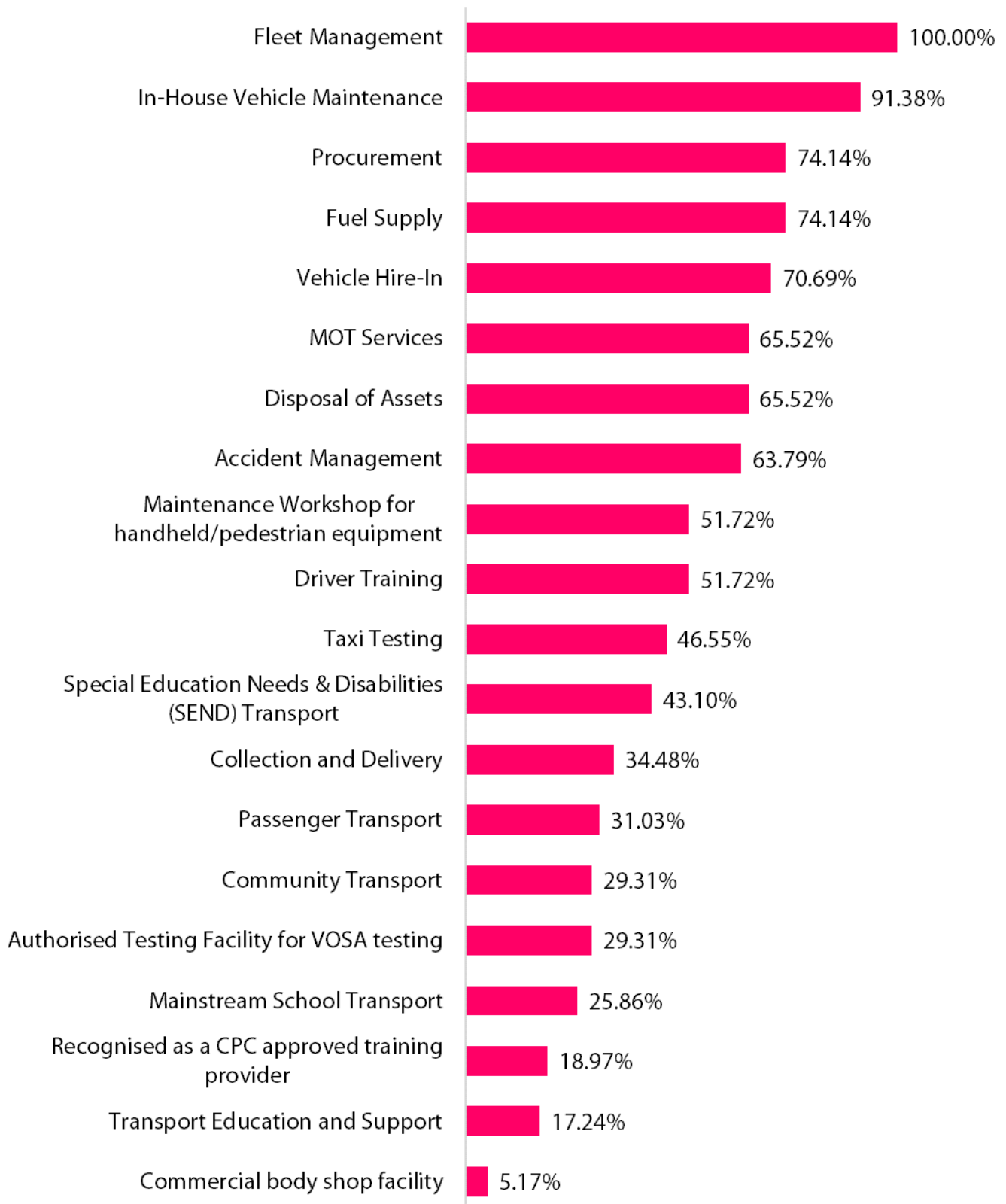
97.78% of those who currently provided in-house services expect them to remain in-house over the next 12 months.

Do you operate a shift system for the maintenance garage? (Please tick all that apply)



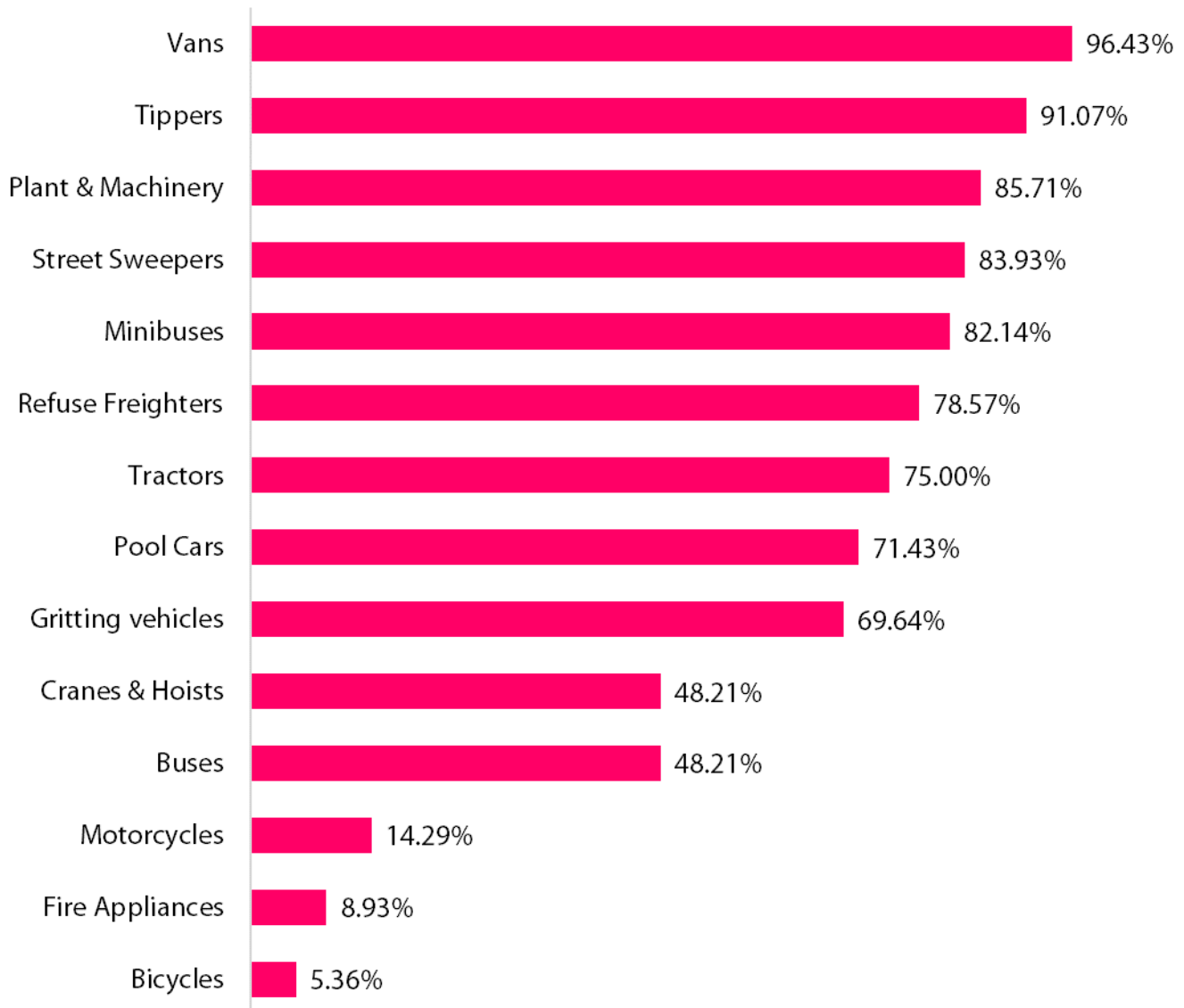
Most respondents operate a Monday to Friday shift system for the maintenance garage (66.67%) with 21.43% open on a Saturday and 0.00% open on a Sunday. 28.57% use single shifts, 50.00% use double shifts and 9.52% have 24 hour working.

Which of the following services does your Transport section provide?



Responses from councils above showcase the wide range of services that local authority transport sections provide. Other responses included DVSA Earned Recognition and Commercial Garage Services.

Which types of vehicle do you maintain?



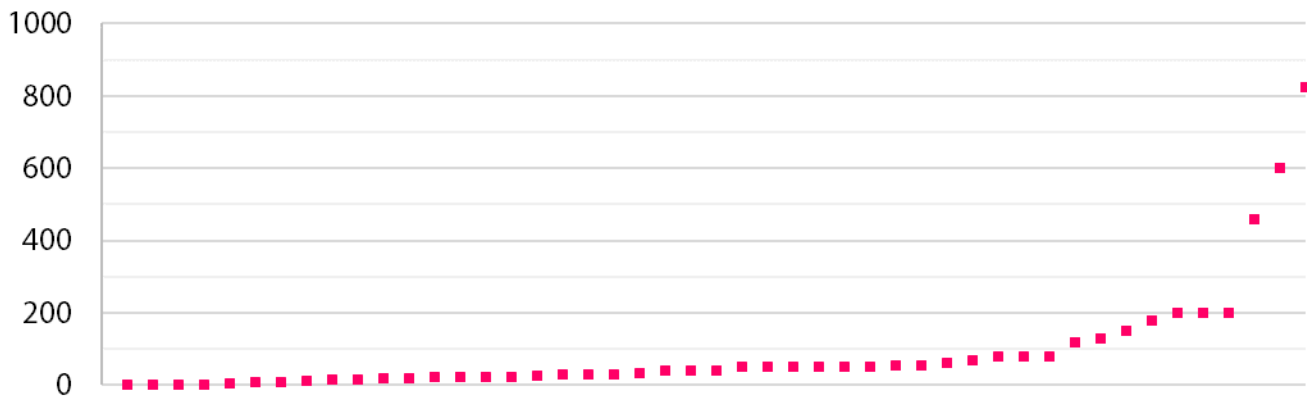
The table above shows the range of vehicle types maintained by responding councils. Other vehicle types mentioned by respondents included tugs, gully tankers, ride on mowers and specialist FRS rescue equipment.

Do you utilise Vehicle Tracking Systems?



90.20% of respondents do utilise Vehicle Tracking Systems.

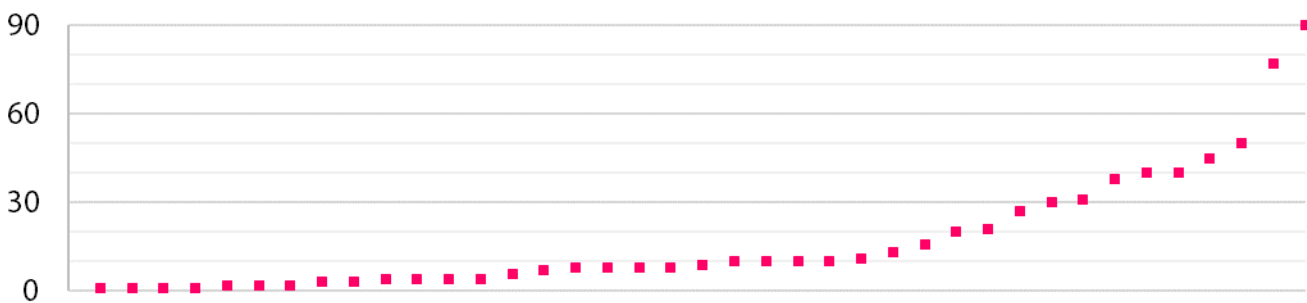
How many vehicles are fitted with video recording systems?



Respondents reported having anywhere from 1 vehicle up to 824 vehicles, with a median of 40.

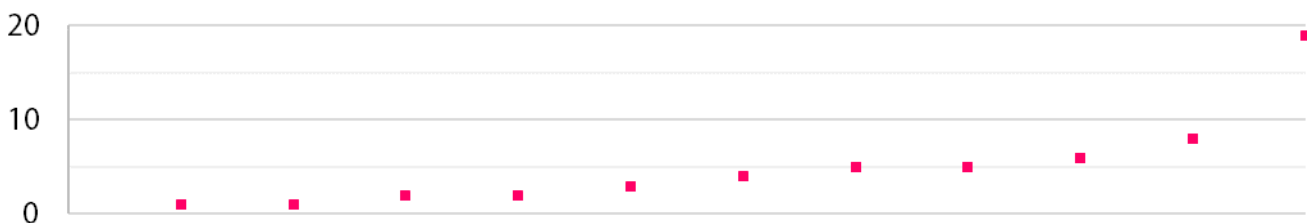
Do you own any electric or alternatively fuelled vehicles?

Electric vehicles



The number of electric vehicles owned by each respondent to the survey is shown in the graph above, with respondents owning between 1 and 90 with a median of 9.

Hybrid vehicles



The number of hybrid vehicles owned by each respondent to the survey is shown in the graph above, with respondents owning between 1 and 19 with a median of 4.

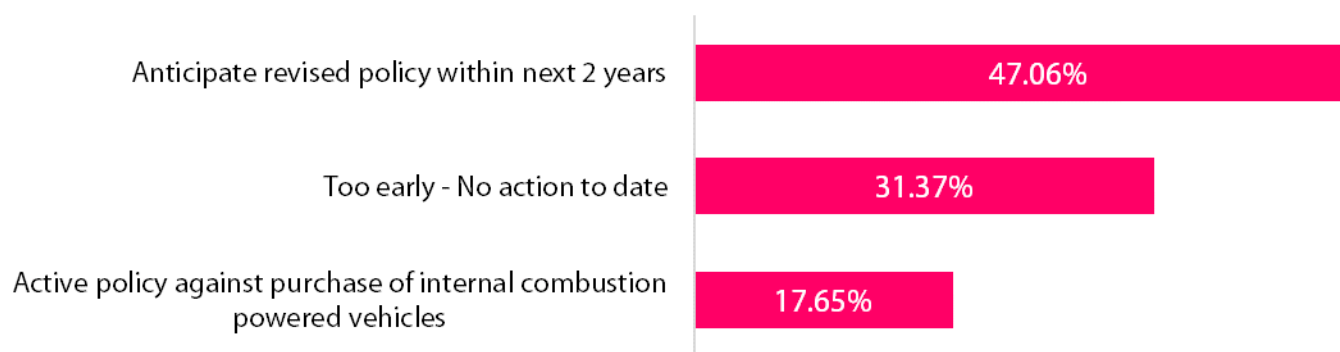
LPG

Only 1 of the survey's respondents were using LPG vehicles of which they only had 1.

Hydrogen cell

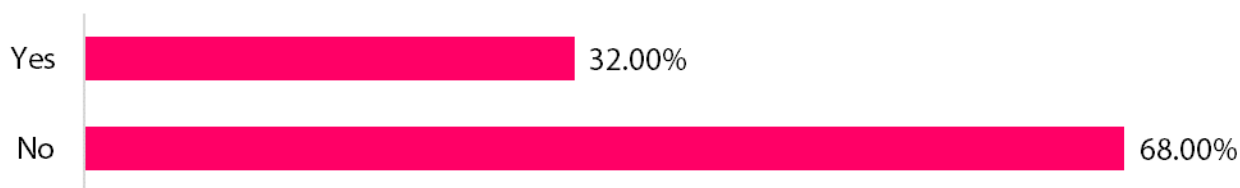
None of the survey's respondents were using Hydrogen cell vehicles.

The Government plans to end the sale of conventional petrol and diesel cars & vans in the future. What plans, if any, have you made to date?



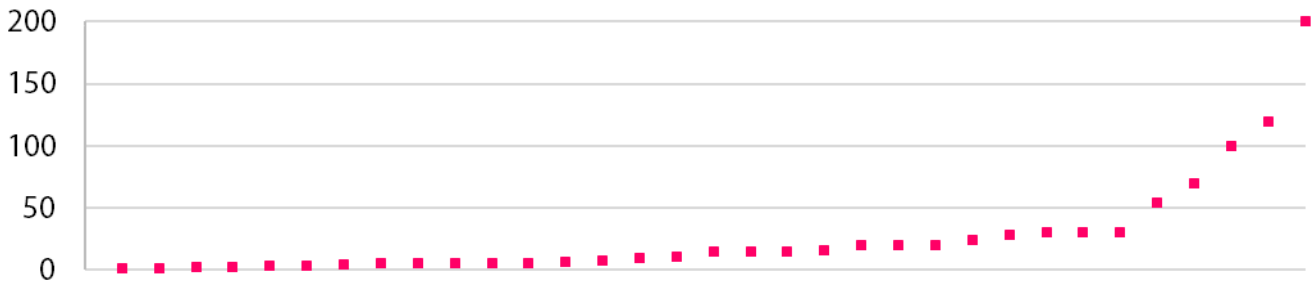
47.06% anticipate that they will have a revised policy within the next 2 years, 31.37% of respondents have not taken any action to date on the plans to end the sale of conventional petrol and diesel cars and 17.65% have an active policy against the purchase of internal combustion powered vehicles.

Do you offer a salary sacrifice scheme for vehicles for employees, or similar?



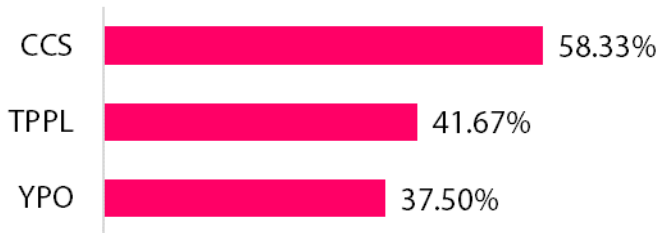
The majority of respondents do not offer a salary sacrifice scheme for vehicles for employees (68.00%), although a significant proportion of responding councils do offer a scheme (32.00%).

How many pool cars do you operate for internal use?



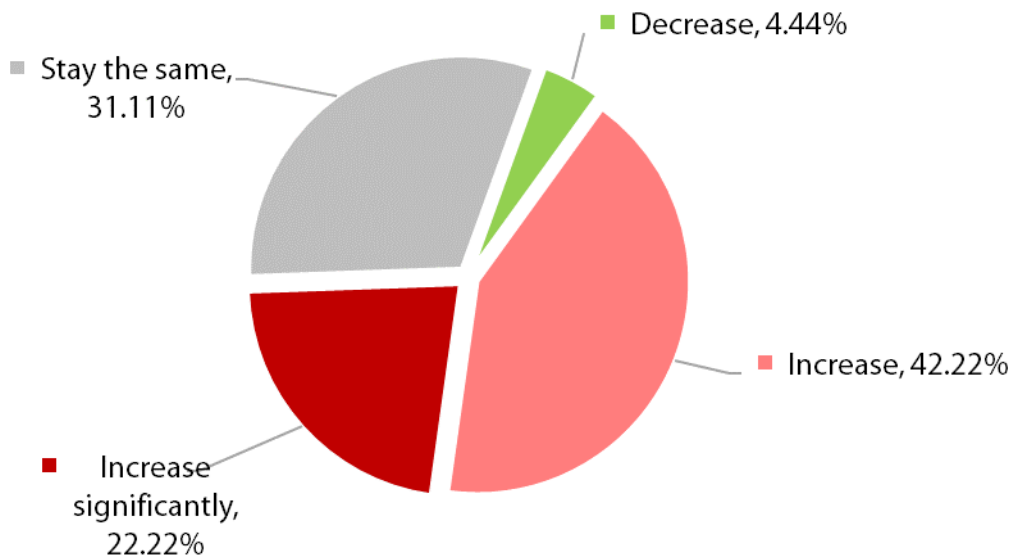
Respondents owned between 1 and 200 pool cars with a median of 15.

Do you use a Vehicle Procurement Framework?



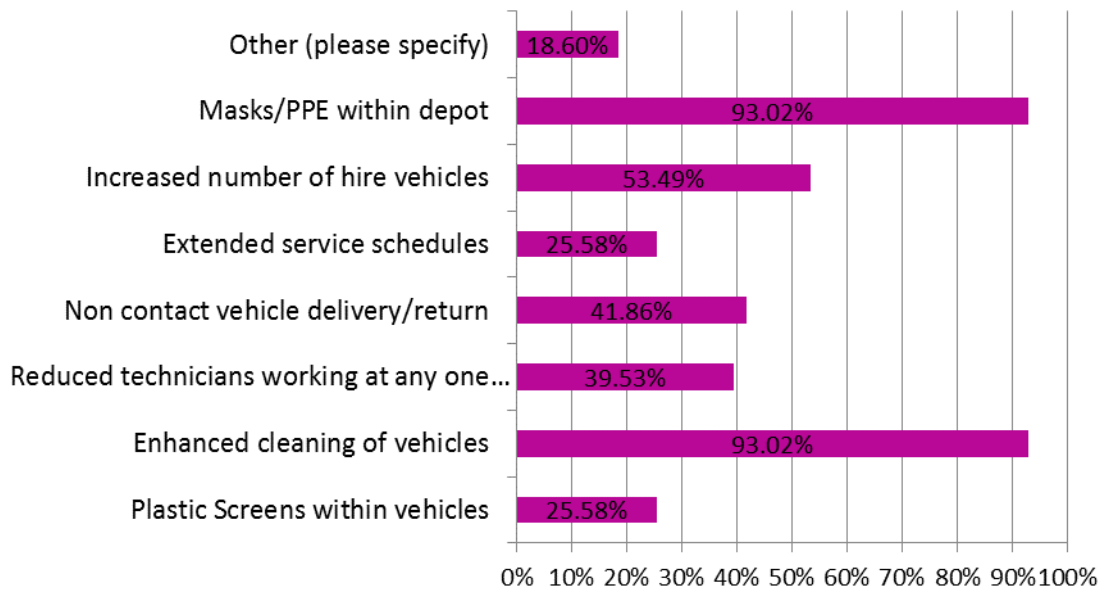
The most popular Vehicle Procurement Framework used by respondents was CCS (58.33%) followed by TPPL (41.67%) and YPO (37.50%). Respondents also reported using Scotland Excel, Nottingham Procurement Consortium, ESPO and Procurement Lincolnshire.

How do you expect the workload of the transport section to change over the next 12 months?



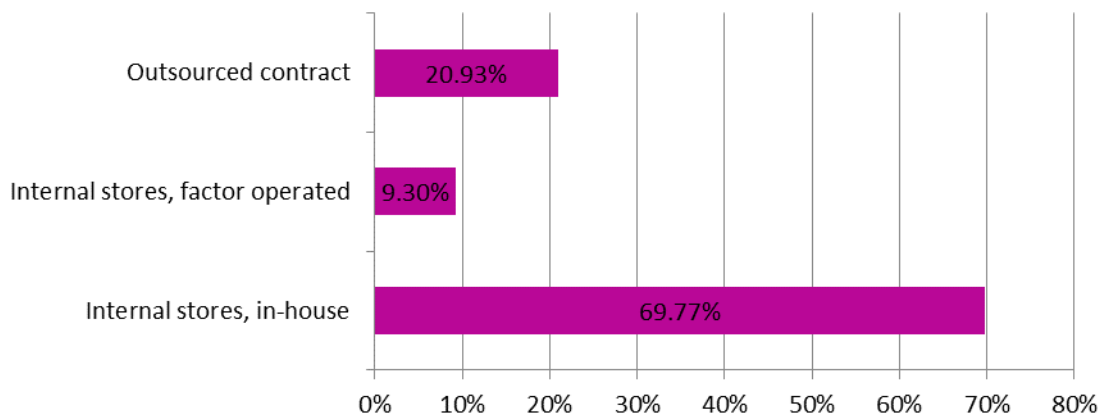
64.44% of respondents expect the workload of the transport section to increase or increase significantly, 31.11% expect it to stay the same and 4.44% expect it to decrease. No respondents expected it to decrease significantly.

What measures have you taken in response to Covid-19?



As might be expected, 93% have issued masks and PPE and enhanced their vehicle cleaning regimes. 53% have hired in additional vehicles to allow for social distancing of staff, 41% instigated non-contact returns, 39.53% reduced the numbers of technicians working at any one time and 25.58% extended service schedules. 25.58% have mounted plastic screens within their vehicles

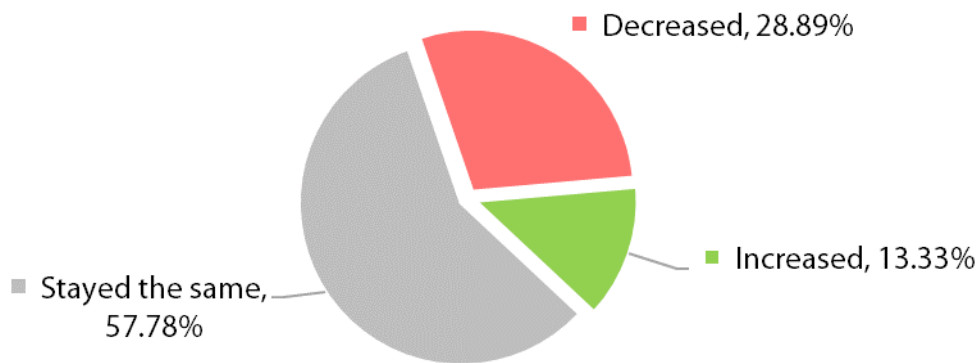
How do you operate your spares system?



69.77% of respondents operate an in-house stores, 20.93% have outsourced and 9.30% have on-site stores managed under a factoring arrangement

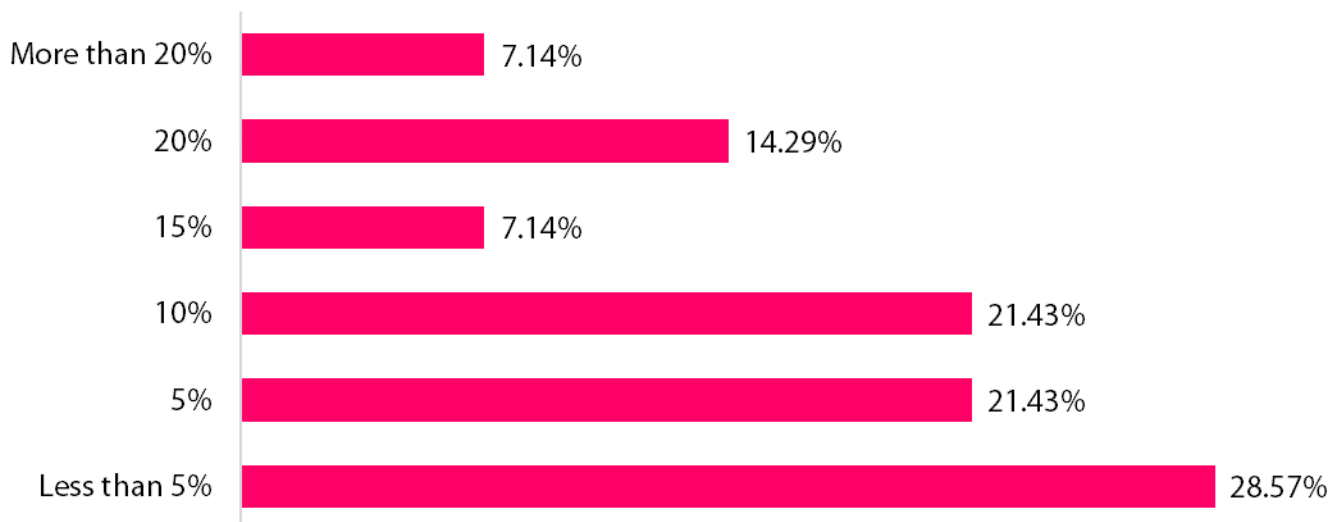
Section 2 - Budget

How has the budget for the Fleet service changed from the last financial year?



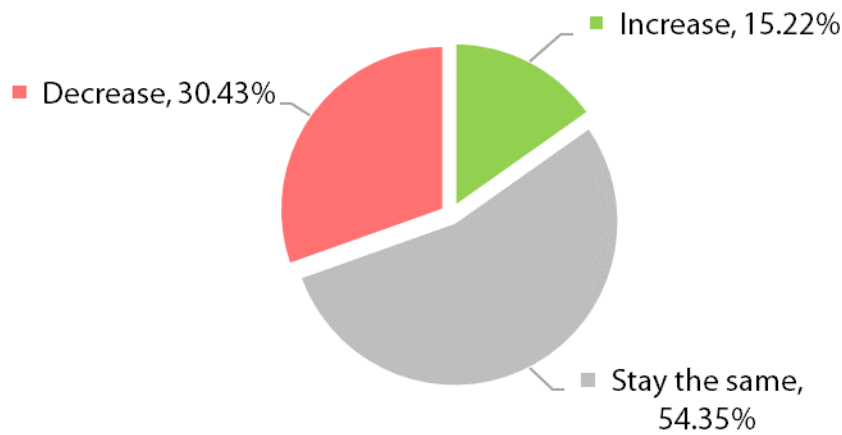
For the majority of respondents, the budget has stayed the same as the last financial year (57.78%). 28.89% reported that their budgets had decreased, and only 13.33% said that it had increased.

If your budget has decreased from last year, by how much has it decreased?



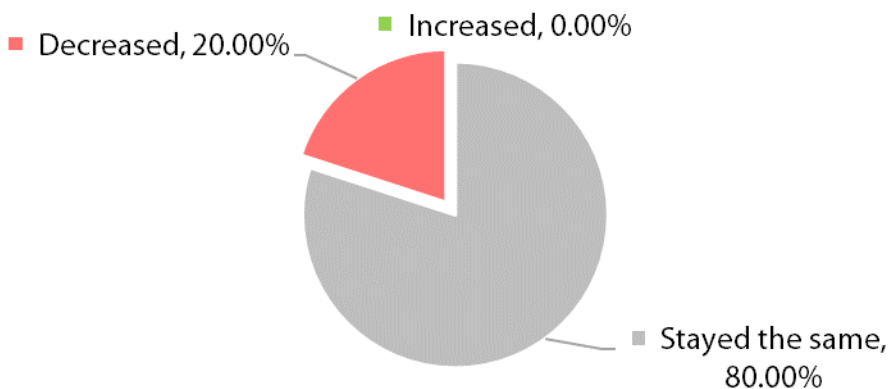
For those responding councils who have decreasing budgets from the last financial year, 28.57% experienced a 'less than 5%' decrease, 21.43% decreased by '5%', 21.43% decreased by '10%', 7.14% decreased by '15%', 14.29% decreased by '20%' and 7.14% decreased by 'more than 20%'.

How do you expect the budget for the Fleet service to change when allocated for the next financial year?



54.35% expect the budget for the next financial year to stay the same, 30.43% expect it to decrease and 15.22% expect it to increase.

What has happened to your Fleet maintenance training budget over the past 12 months?

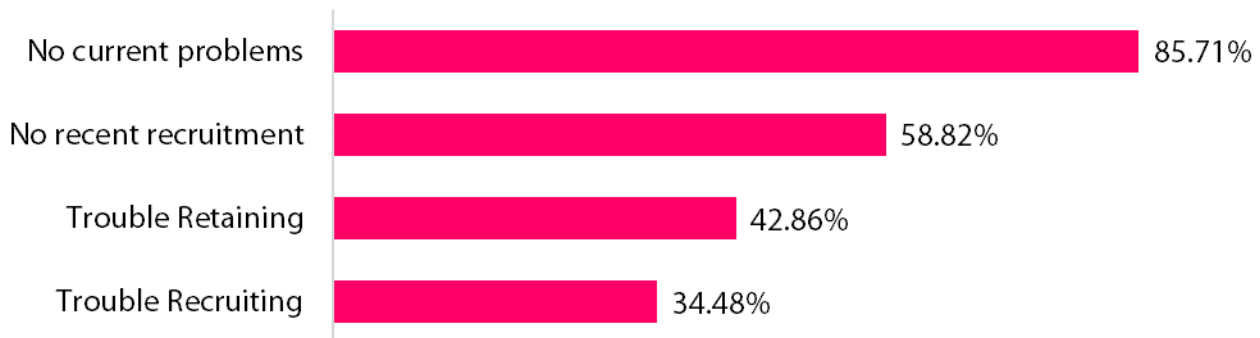


Over the past 12 months, most of the respondents' fleet maintenance training budget had stayed the same 80.00%, with 20.00% experiencing a decrease and 0.00% experiencing an increase.

Section 3 - Staffing

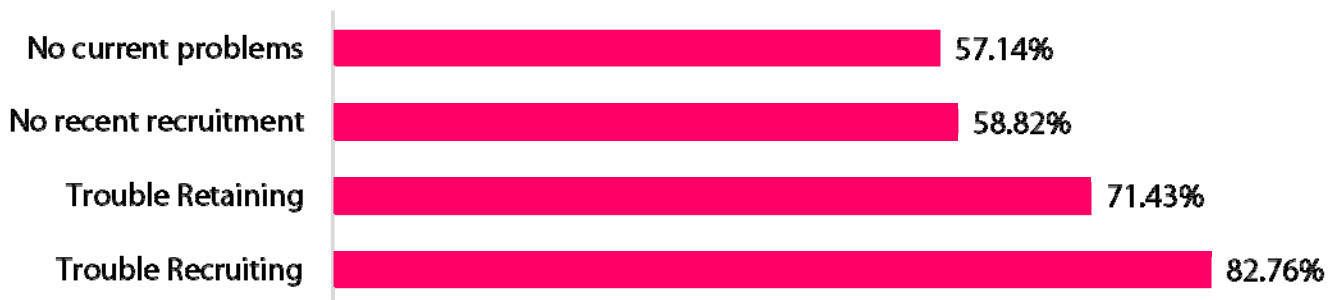
Are you having trouble recruiting or retaining staff? (over the past 12 months)

Operatives



Most respondents reported as having no current problems (85.71%) with recruiting or retaining operatives, but 42.86% reported having trouble retaining and 34.48% had trouble recruiting.

Technical Staff



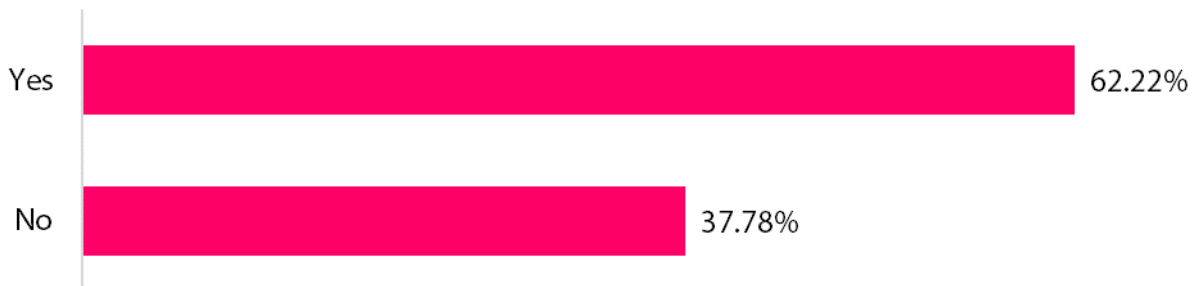
In terms of technical staff, most reported having trouble recruiting (82.76%) and some had issues retaining staff (71.43%). 57.82% reported as having no current problems.

Managerial Staff



Unlike operatives and technical staff, very few had problems recruiting staff (3.45%) and none had any problems retaining staff (0.00%); 64.29% reported as having no current problems.

Do you personally feel staff absence levels are at an acceptable level?



While the majority of respondents reported that they personally feel staff absence levels are at an acceptable level (62.22%), a large portion of respondents disagreed with this statement (37.78%).

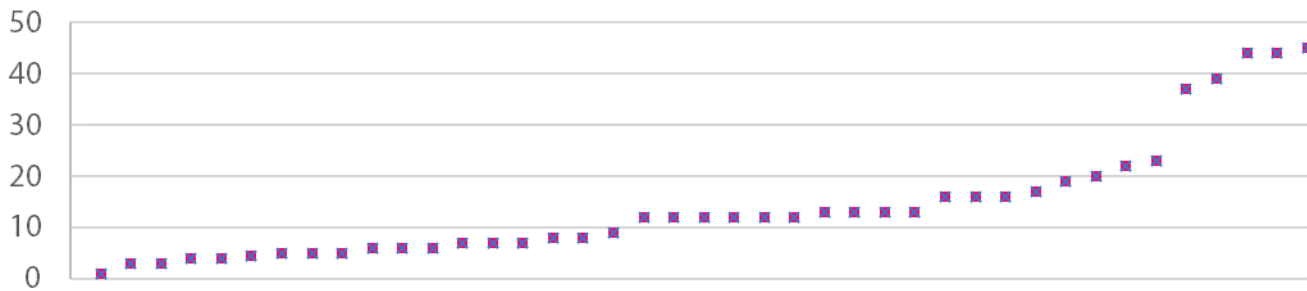
Do you run an apprenticeship scheme?



84.44% of respondents do run an apprenticeship scheme.

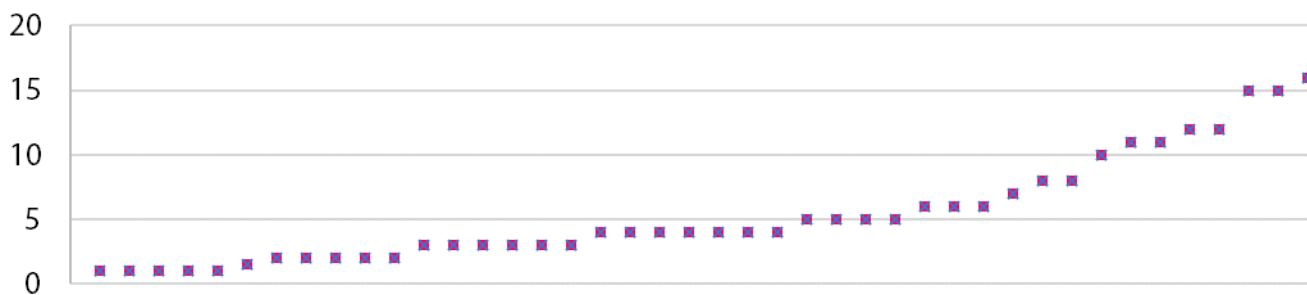
Approximately how many staff do you employ within fleet operations?

Maintenance Fitters



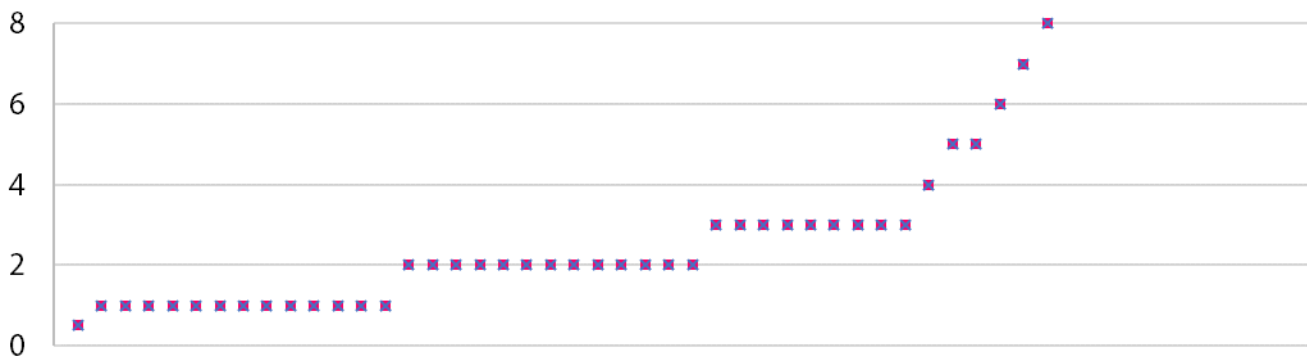
Across responding authorities, the number of maintenance fitters varied considerably from 1 up to 45 with a median of 12. Each council response is shown in the table above.

Technical / Supervisory / Administrative support



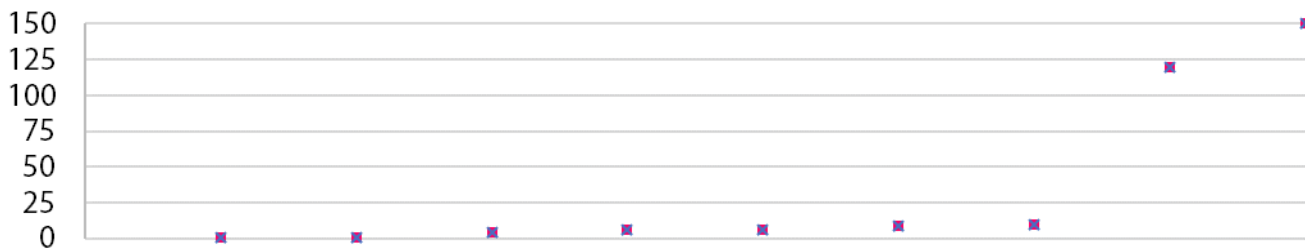
The number of technical / supervisory / administrative staff ranged from 1 up to 16 members of staff with a median of 4.

Managerial



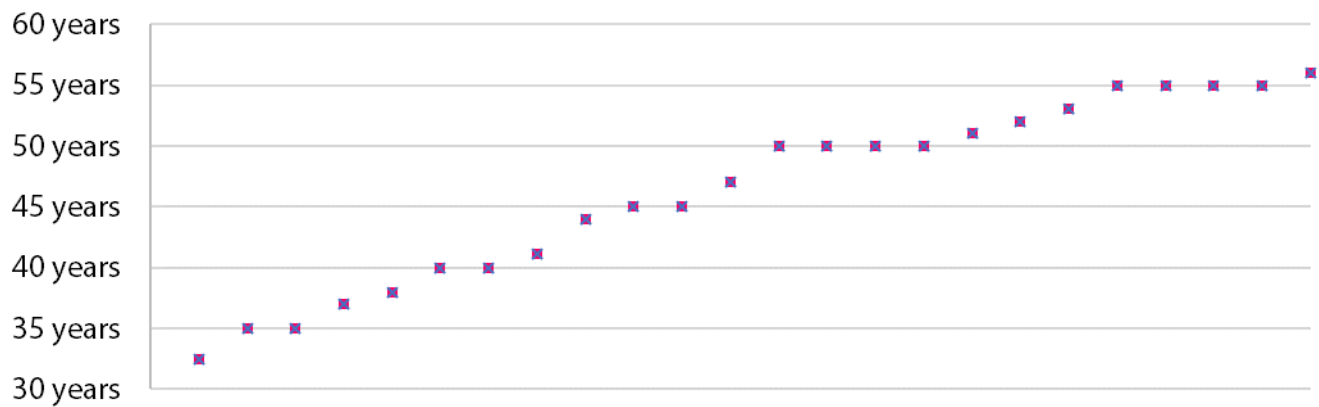
The variance in numbers of managerial staff was from a single part-time managerial position to 9 with a median of 2.

SEN Transport Administration (excluding drivers and escorts)



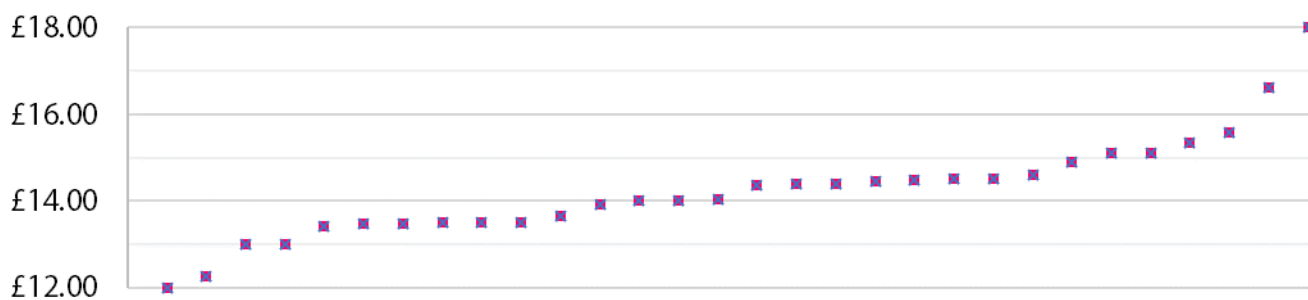
The number of SEN Transport Administration staff per authority ranged from 1 to 150 with a median of 6.

What is the average age of your Fleet maintenance operational staff?



The average age of Fleet maintenance operational staff varied considerably from authority to authority, with a low of 32.5 years to a high of 58 years. Across all respondents, the average age was 46.78 years.

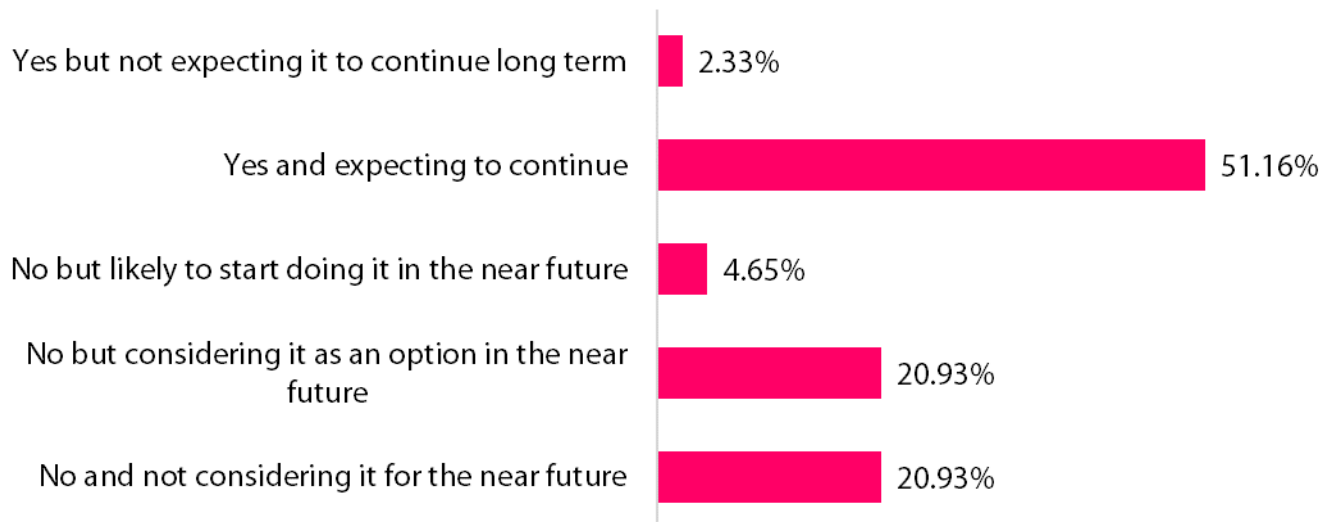
What is the basic hourly rate of pay for your fitters?



The basic hourly rate of pay for fitters ranged from £12.00 to £18.00, with an average of £14.24.

Section 4 – Areas of growth and decline

Do you currently sell your services to organisations external to the council?



Most respondents do currently sell their services to organisations external to the council and are expecting to continue (51.16%), although an additional 2.33% are not expecting this to continue long term. 4.65% are likely to start this in the near future, 20.93% are considering it as an option in the near future. The remaining 20.93% are not considering this option for the near future.

If you do currently sell your services to organisations external to the council, do you use:



All respondents use simple charging mechanisms (100.00%).

Where do you see growth areas for the service over the next 12 months?

Growth areas identified by responding councils include:

- MOT testing and maintenance/repair work
- Servicing and repairing electric vehicles
- Driver training
- Vehicle numbers
- New fuel vehicles
- School and Public Transport
- Further commercialisation
- Commercial waste
- Garden waste

Where do you see areas where work may decrease over the next 12 months?

Areas where work may decrease over the next 12 months include:

- Fossil fuel vehicles
- Taxi testing
- Car parking
- Work outsourced to third parties
- Maintenance (through electric vehicles requiring less maintenance)
- Reduced internal work
- Overtime
- Elderly day services
- Pool car usage

Local Authority Transport Services State of the Market 2020

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 of APSE. Due to Covid-19, these are held online, at present, approximately four times a year. 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:-

- FM & Building Cleaning
- Catering (school meals)
- Cemeteries and Crematoria
- Environmental Health
- Highways and Street Lighting
- Housing Construction and Building Maintenance
- Local Authorities Commercialisation, Income and Trading Network
- Parks, Horticulture and Grounds Maintenance
- Renewables and Climate Change Network
- Sports and Leisure Management
- Vehicle Maintenance and Transport
- Waste Management, Refuse Collection and Street Cleansing