

State of the Market Survey

2021

Local Authority Highways Services



December 2021

21-52

The state of the market survey was conducted by Rob Bailey, APSE Principal Advisor for Local authority highways services.

The report was written and prepared by Garry Lee, Research and Coordination Officer.

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Results at a glance

Service delivery

% is your service is delivered in-house	75.51%
% do you currently sell your services to organisations external to the council and expect to continue	45.71%
% are you fully prepared for the introduction of Well managed Highways Infrastructure	41.18%
% have you seen an increase in the number of claims referring to vehicular damage as a result of highway condition over the past 3 years	100.00%
% have you seen an increase in legal claims for slips, trips and falls over the past 3 years	50.00%
% do you estimate the existing damage to roads in your council area will never be repaired to an acceptable standard	31.03%

Budgets

% budget decreases from the last financial year	16.67%
% highways maintenance training budget has stayed the same over the past 12 months	82.35%

Staffing

% those who personally feel staff absence levels are not at an acceptable level	23.53%
% those who run an apprenticeship scheme for the service	77.14%
% those with difficulty recruiting operatives	59.38%
% those with difficulty retaining operatives	46.88%
% those with difficulty recruiting technical/managerial staff	54.55%
% those with difficulty retaining technical/managerial staff	39.39%
Average age of highways maintenance staff	47 years

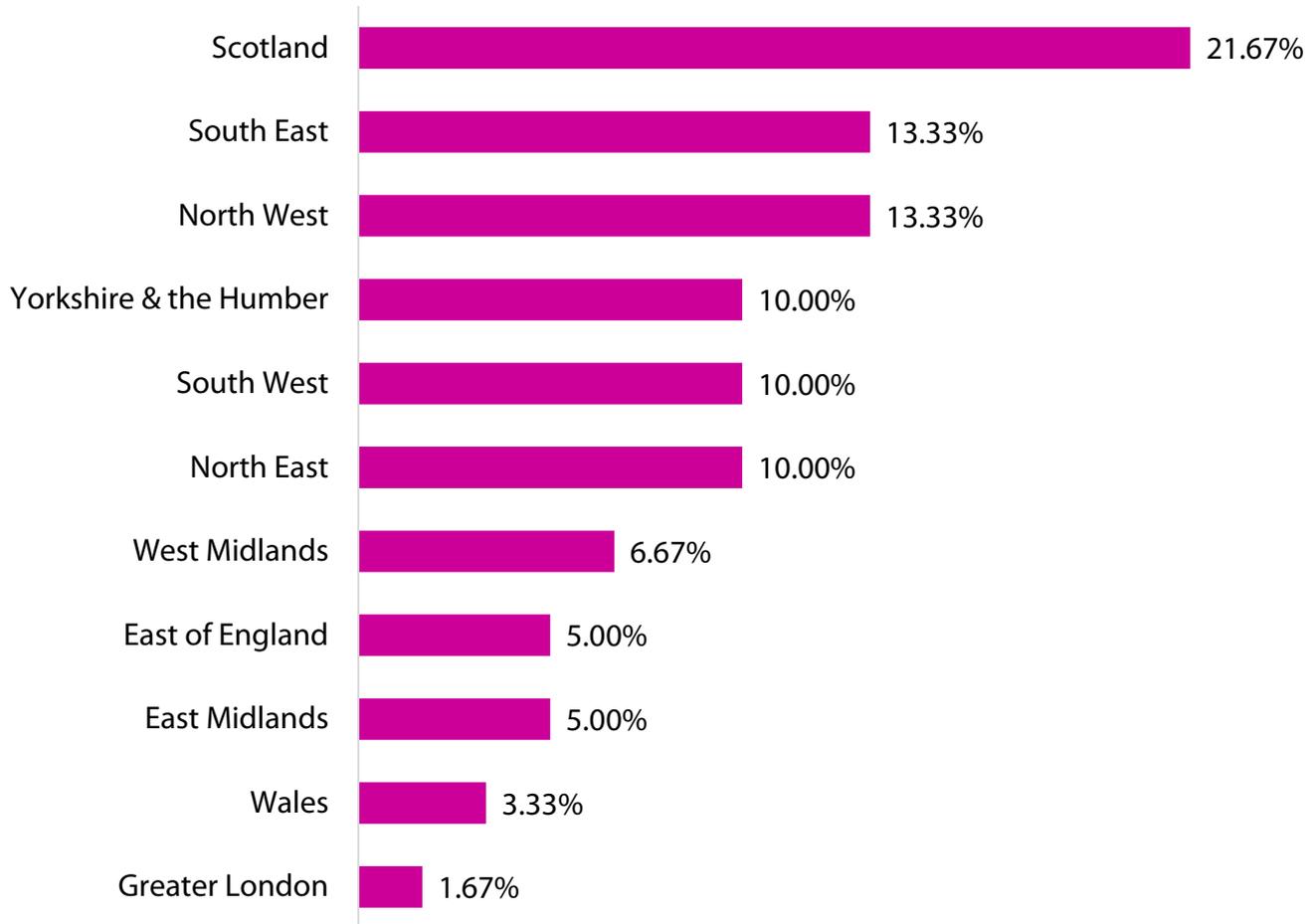
Introduction

APSE conducted an online survey during August 2021 to September 2021. A series of questions were asked covering a range of issues of interest to those officers, managers and councillors responsible for Highways services.

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

There were 60 responses from local authorities to this survey. Individual details of respondents have been kept confidential. **Results of the survey should be treated as a snapshot of current opinions but do offer a light touch opportunity to explore some trends in Highways Services.**

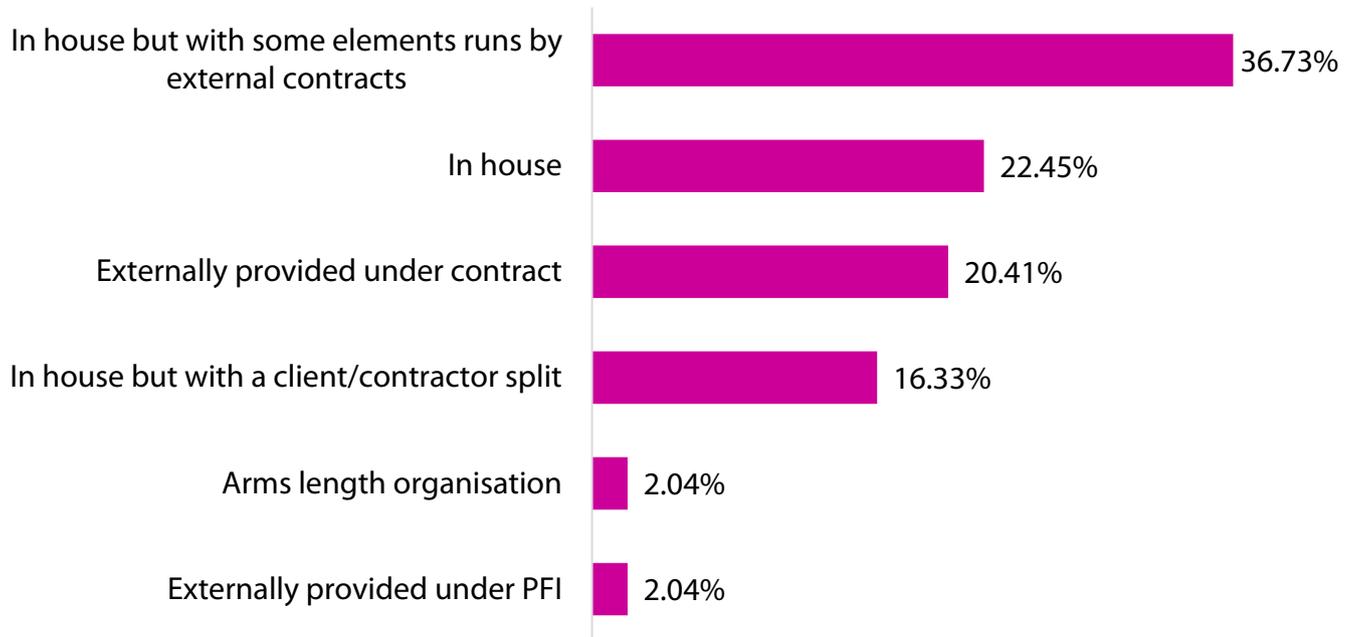
Where in the UK do you work?



The table above shows the breakdown of where the respondents to the survey are located in the UK.

Section 1 – The Service

How are your highways services currently delivered?



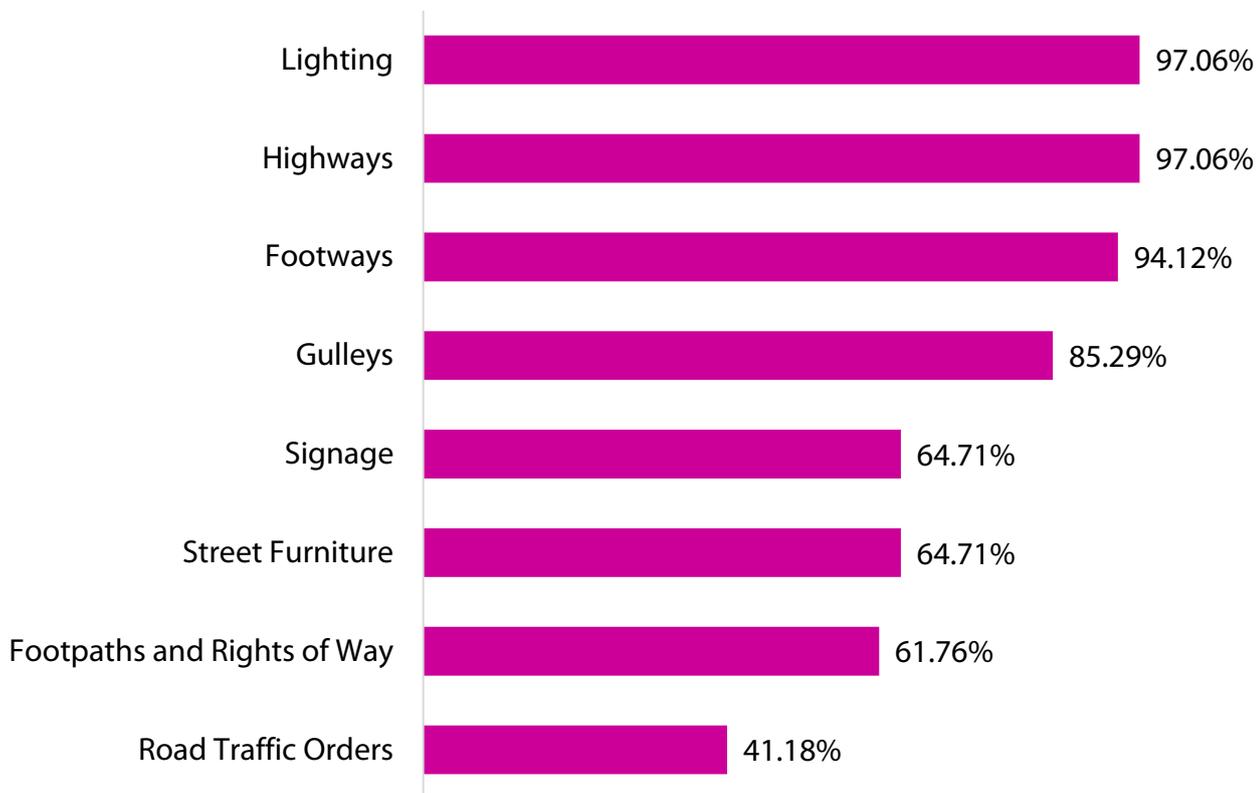
75.51% of highways services are currently delivered in house **when responses are accumulated**, 22.45% are delivered externally, 2.04% by an arm's length organisation.

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



All respondents with in-house services expected their service to remain in-house over the next 12 months.

What assets do you currently hold within your asset management system?



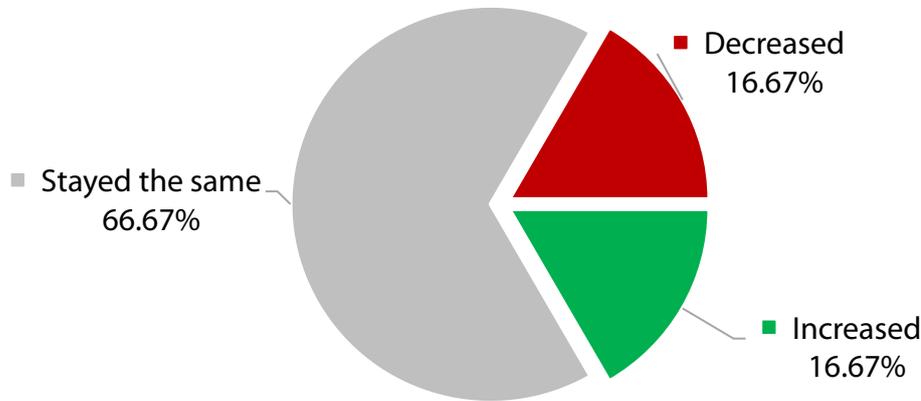
The majority of respondents held lighting (97.06%), highways (97.06%), footways (94.12%), gulleys (85.29%), signage (64.71%), street furniture (64.71%) and footpaths/rights of way (61.76%). 41.18% also held road traffic orders in their asset management system.

What Asset Management System do you use?

The most common answers to this question were Confirm, Mayrise, Symology, WDM and Yotta. Other answers included AMX, Expert Assets, BridgeStation, PONTIS, KaarbonTech, Playbuilder, HIRAM, Imtrac, Alloy and bespoke internal systems.

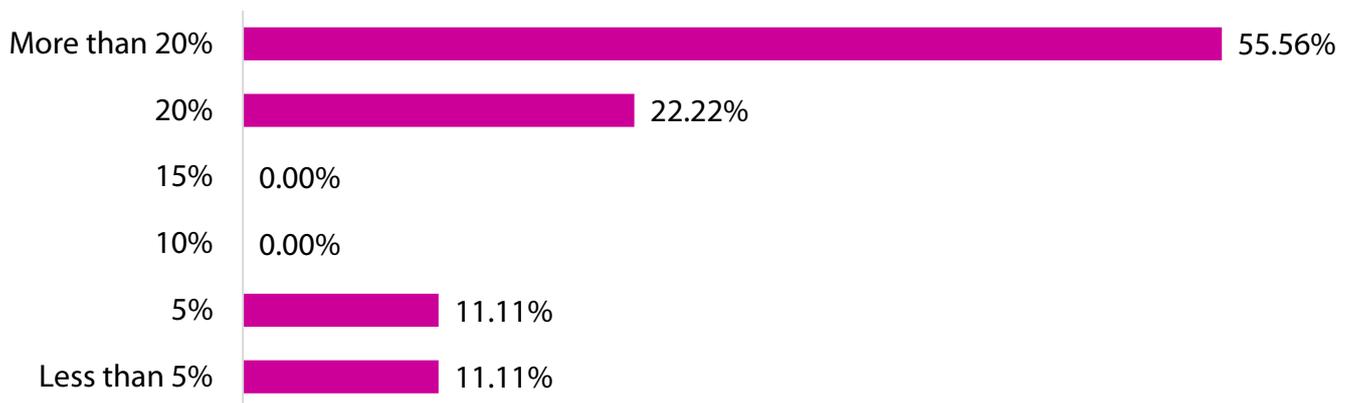
Section 2 – Budget

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



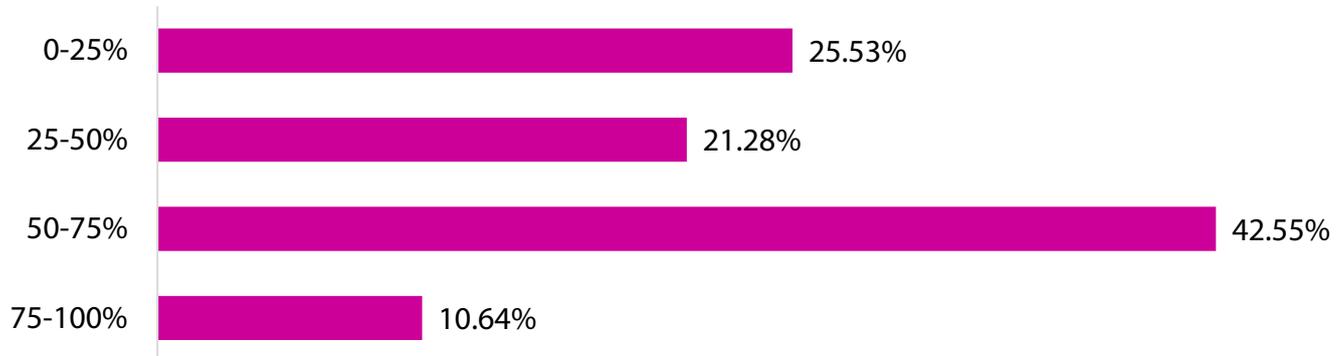
For the majority of respondents, the budget for the highways service stayed the same from the last financial year (66.67%); 16.67% said it had increased, and 16.67% said it had decreased.

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



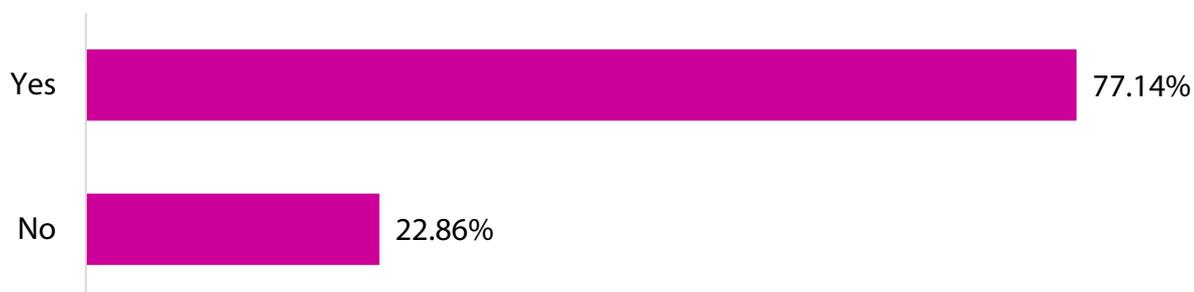
For the respondents who experienced budget decreases, most experienced a decrease of more than 20% (55.56%). **This is a significant decrease and it will be interesting to explore whether this trend continues.**

To what extent will this year's budget for highways maintenance meet the need to fill potholes and resurface where necessary?



The extent to which this year's budget for highways maintenance met the need to fill potholes and resurface where necessary varied from authority to authority, but most respondents felt that it would not cover all of their needs, with 89.36% answering between 0% and 75%.

Do you run an apprenticeship scheme for the highways maintenance service?

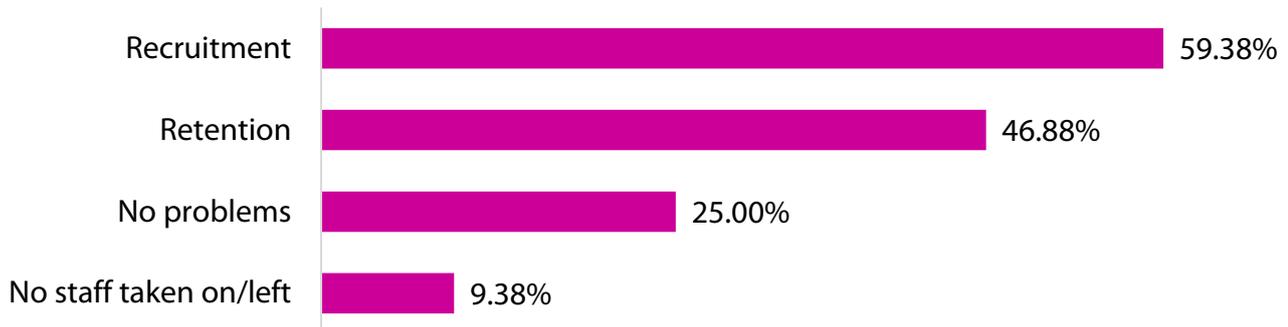


Most of the responding councils (77.14%) do run an apprenticeship scheme for the highways maintenance service. **This is an encouraging figure and demonstrates the service is adopting a 'grow your own' approach to the future workforce'.**

Section 3 – Staffing

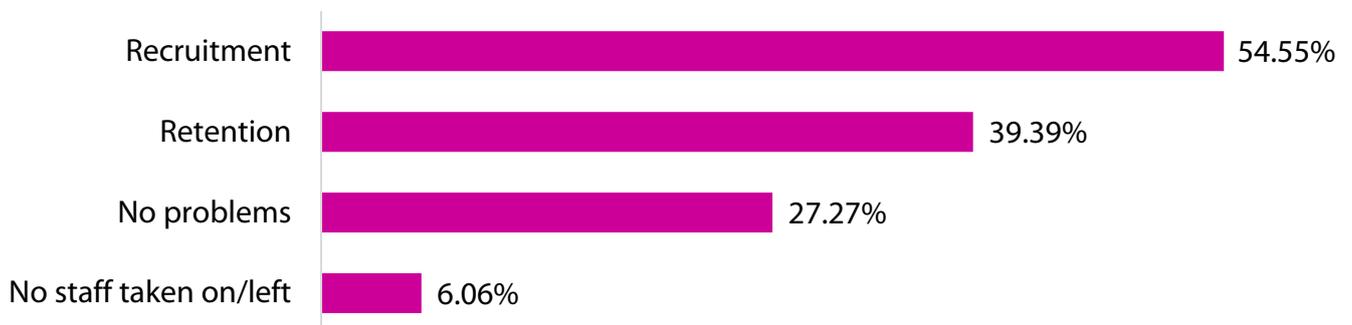
Where have you had difficulty recruiting or retaining staff (over the past 12 months)?

Operatives



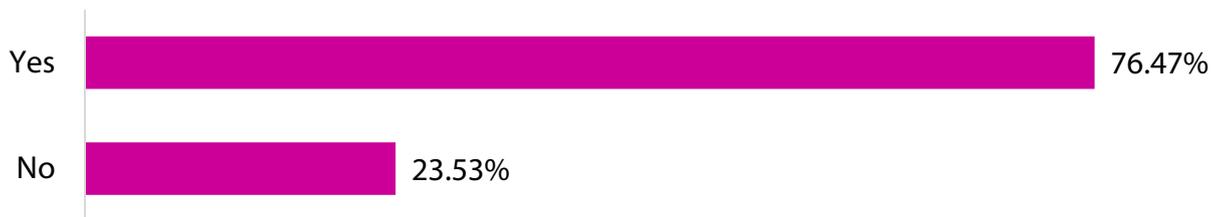
59.38% of respondents have experienced difficulty recruiting operatives, and 46.88% have experienced difficulty retaining them. *These are worrying high figures but correlate to other APSE survey work which suggests that workforce pressures on recruitment are mounting across a range of services and pay competition from other sectors is starting to have an impact on the attractiveness of local government as employer of choice.*

Technical/managerial staff



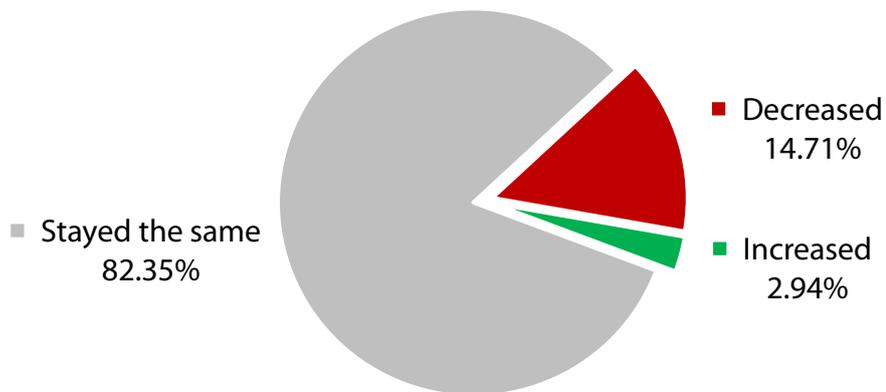
54.55% of respondents had experienced difficult recruiting technical/managerial staff, and 39.39% had issues retaining them. **Again this correlates to overarching figures for overall workforce recruitment and retention issues.**

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



The majority of respondents felt that staff absence levels are at an acceptable level (76.47%).

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



Over the past 12 months, the majority of highways maintenance training budgets have stayed the same (82.35%), 14.71% have decreased and 2.94% have increased.

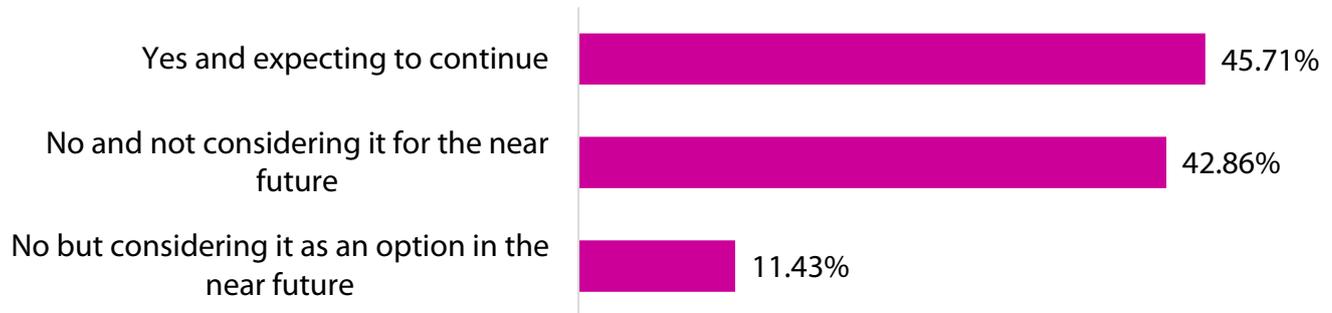
What is the average age of your highways maintenance operational staff?-



The average age of highways maintenance operational staff among respondents was 47, with a lowest of 37 and a highest of 58.

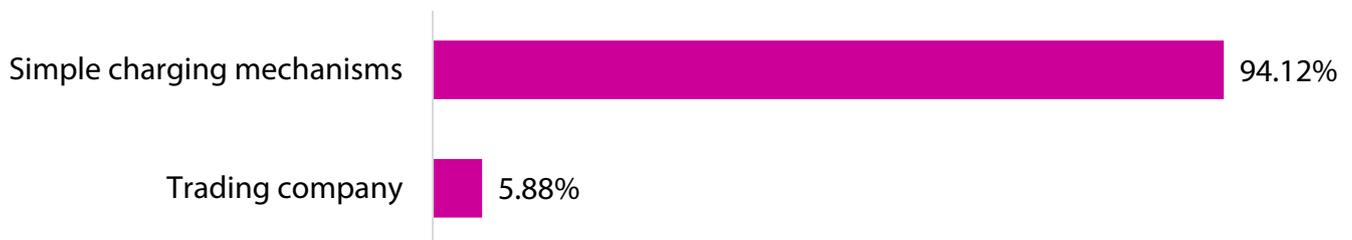
Section 4 – Service Delivery

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



45.71% of those who currently sell their services to organisations external to the council are expecting to continue doing so. Among those who do not currently sell their services, 11.43% are considering it as an option in the near future and 42.86% are not considering it.

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



94.12% of respondents sell their services to organisations external to the council through simple charging mechanisms, and 5.88% use a trading company. **This provides an insight into the efficacy of simple charging arrangements widely used across local government.**

Has the severe weather over the past 3 years led to any of the following?



100.00% of respondents have seen an increase in the number of claims referring to vehicular damage as a result of the highway condition, and 50.00% have seen an increase in legal claims for slips, trips and falls over the past 3 years. **Within APSE Performance Networks data this continues to be a contentious area with a more robust approach to defending legal being adopted within many council.**

Section 5 – Opinions

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

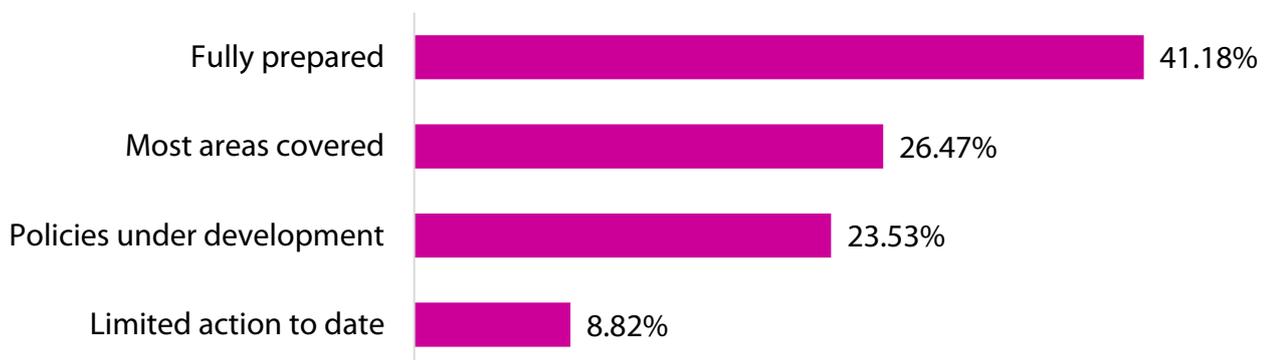
- Walking and cycling schemes
- Climate change adaption / clean air work
- Gully emptying
- Potholes
- Road markings
- Drainage maintenance
- Commercial opportunities
- Increasing fibre broadband
- Town centre enhancement schemes
- Flooding prevention works

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

The majority of respondents did not see any areas where work may decrease, but common answers included:

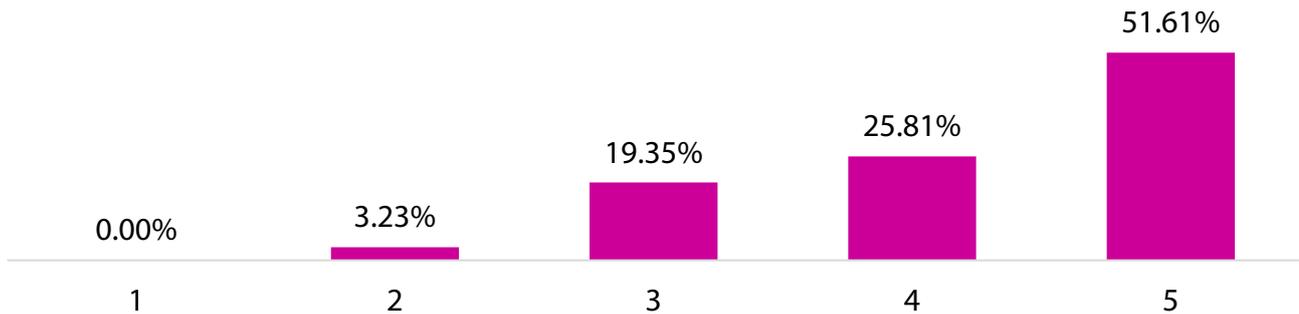
- Traditional resurfacing
- Capital works
- Pothole patching
- General maintenance

How prepared are you for the introduction of the New Code of Practice “Well managed Highways infrastructure”?



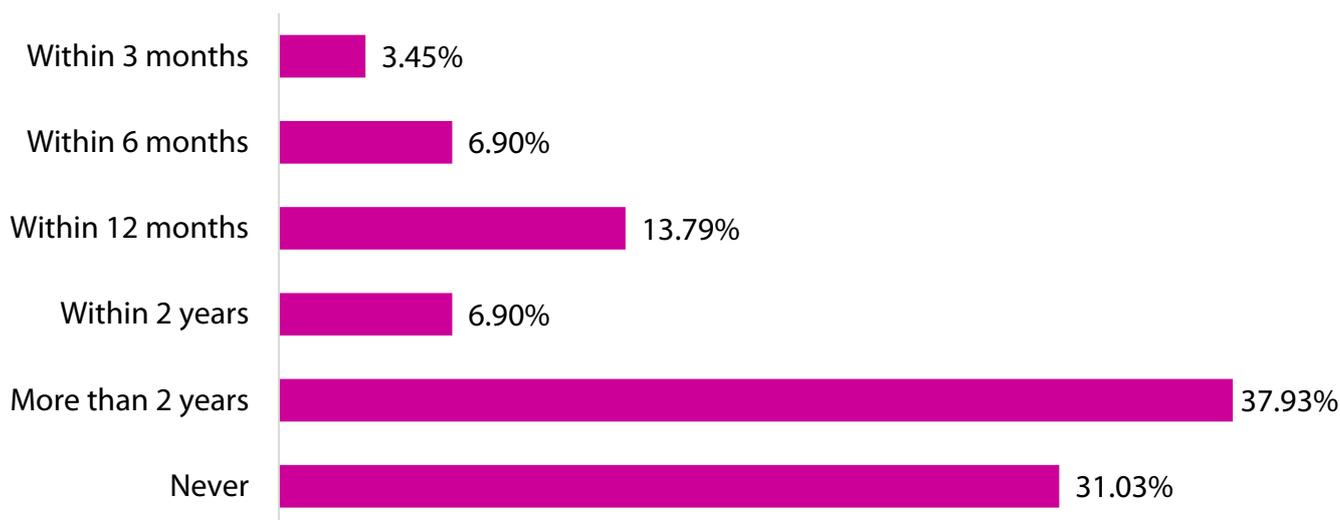
Most respondents felt that they were fully prepared for the introduction of the New Code of Practice “Well managed Highways infrastructure (41.18%). Only 8.82% felt their authority had taken limited action to date.

How strongly do you rank your council’s approach to defending claims? (from 1 weak to 5 strong)



Most respondents ranked their council’s approach to defending claims on a scale of 1-5 as a 5 (strong – 51.61%). None of the respondents considered their approach to be weak.

When do you estimate the existing damage to roads in your council area will be repaired to an acceptable standard by?



Most respondents estimated that the existing damage to roads in their council area will be repaired in more than 2 years (37.93%) or never (31.03%). **This set of responses confirm what many highways professionals regularly report which is the long-term condition of the highways asset requires much more investment, than that which is currently available to them.**

What is the most innovative development in highways maintenance you have seen in recent times?

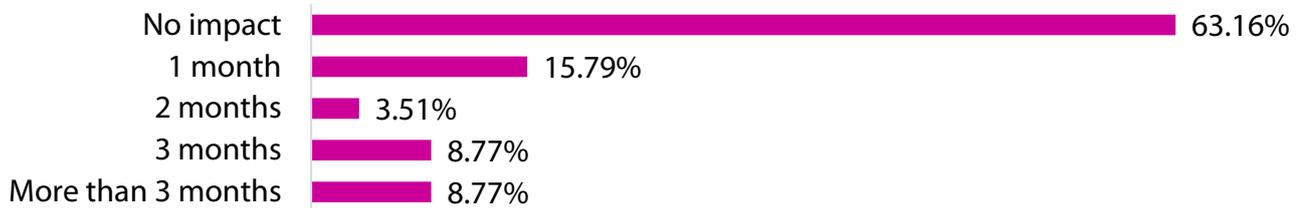
Answers to this section included

- Increased use of recycled materials
- AI and machine learning
- Warm asphalt
- Asset management – record keeping
- Infra-red patching
- Condition data gathering
- Microsurfacing
- National frameworks

Section 6 – The Pandemic

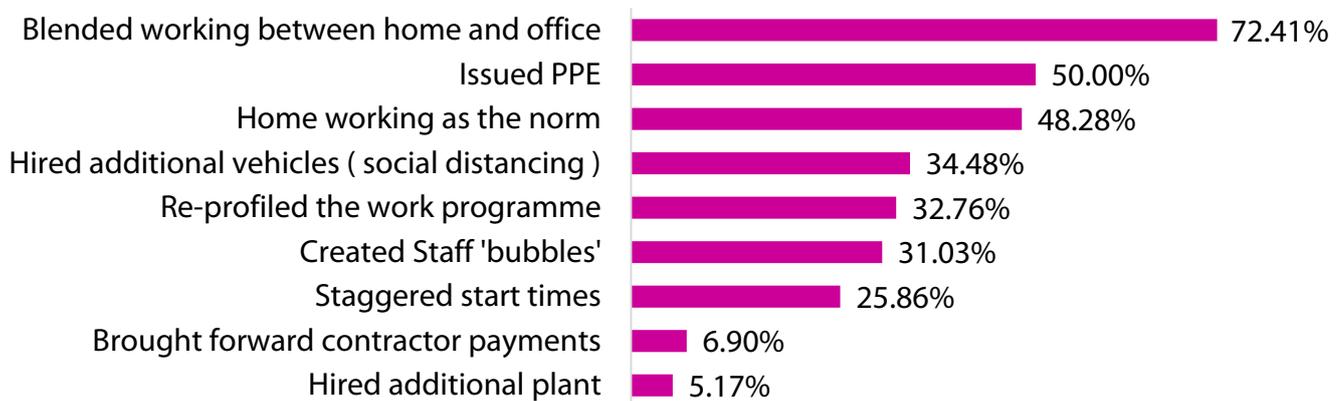
Section 6 has been added to the survey to determine how COVID-19 has impacted on the resurfacing schedule and the practices that have changed.

How has COVID-19 impacted on your 2021 resurfacing schedule? How many months behind schedule are you?



The majority of respondents (63.16%) felt that COVID-19 had no impact on the 2021 resurfacing schedule.

Have you changed practices for COVID-19? (Please tick all that apply)



The most popular changed practices by the majority of respondents were: blended working and the issuing of PPE. The answer on home working as the normal operation appears to be answered from a managerial perspective since highways operators of course cannot work from home; the responses may however imply arriving directly onto the works site to avoid congregation in depots.

APSE Analysis

As illustrated by the responses to the survey the highways service continues to be under pressure when it comes to its' ability to maintain or restore the asset due to budget constraints. It is notable that there are now positive changes emerging on newer materials; this will only increase in the coming years as councils who have declared a climate emergency will look to 'green' all services and use every opportunity to decarbonise operations. The management and defence of claims will continue to be an issue that the sector has to grapple with. However on a more positive note the volume of apprenticeships is encouraging and will assist future workforce sustainability.

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. **The groups are held approximately four times a year as in-person networks and online. 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. Alternatively, you can sign up online to our highways group using [this link](#).**

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