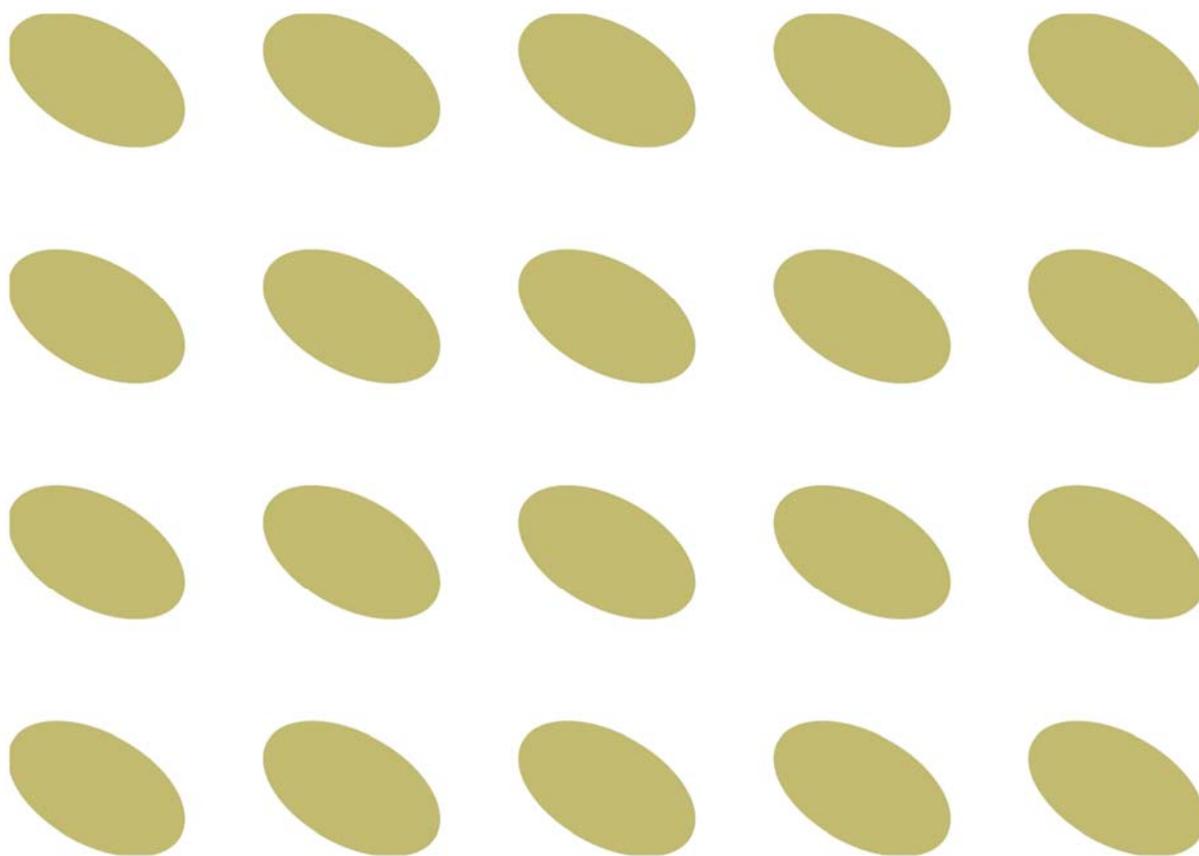


State of the Market Survey

2021

Local Authority Winter Maintenance Services



November 2021

21-53

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Table of Contents

Results at a glance	3
Section 1 - The Service.....	5
• How are your winter maintenance services delivered?	
• If the service is currently provided in-house, do you expect the service to remain in-house over the next 12 months?	
• Do you currently sell your services to organisations external to the council?	
• Do you have a snow warden (or similar) scheme in place?	
• What technology do you use to assist the service?	
• Do you use a weather forecasting service?	
Section 2 - Budget.....	8
• How has the budget for the winter maintenance service changed from 2020-21 to 2021-22?	
• If your budget has decreased compared to the last financial year, how much has it decreased by?	
• With reference to the weather during the winter 2020-21, what has been the impact on your winter maintenance budget?	
• If you have a dedicated training budget for winter maintenance, what has happened to it over the past 12 months?	
Section 3 – Severe Weather.....	10
• What changes have you made to service agreements as a result of severe weather over recent years?	
• Has the severe weather over the recent years led to any of the following?	
Section 4 - Salting	11
• With regard to your road network, which of the following are salted?	
• Do you salt footways?	
• If you do salt footways, approximately what percentage of the footway network do you salt?	
• If you do salt footways, which of these do you salt?	
• What proportion of necessary footway salting do you consider was achieved?	
• Have the orders you placed for salt to cover winter maintenance over 2020-21 been met by your suppliers?	
• How do you purchase salt supplies?	
• Which company supplies your salt?	
• Do you have any suggestions for how councils or suppliers can act to avoid salt shortages in times of very bad weather in future?	
Section 5 – Opinions	15
• Where do you see growth areas for the service over the next 12 months?	
• Where do you see areas where work may decrease over the next 12 months?	

Results at a glance

% expecting the service to remain in-house over the next 12 months	98.00%
% currently selling services to organisations external to the council	28.81%
% with a snow warden scheme (or similar) in place	26.00%
Budget	
% of respondents whose budget has stayed the same from 2020-21 to 2021-22	67.80%
% of respondents who had to overspend on their 2020-21 winter maintenance budget	80.39%
% of respondents who underspent on their 2020-21 winter maintenance budget	9.80%
% whose dedicated training budget had stayed the same	100.00%
Salting	
% whose salt orders were met in full by suppliers over 2020-21	94.00%
% reviewing gritting / salt routes after the severe weather over the recent years	84.21%
% purchasing salt supplies jointly with other authorities	24.44%
Footways	
% salting footways as a precautionary measure following forecast	40.74%
% not salting footways	16.67%
% who had salted 75-100% of necessary footway salting	68.29%
% who had not salted any of the necessary footway salting	4.88%

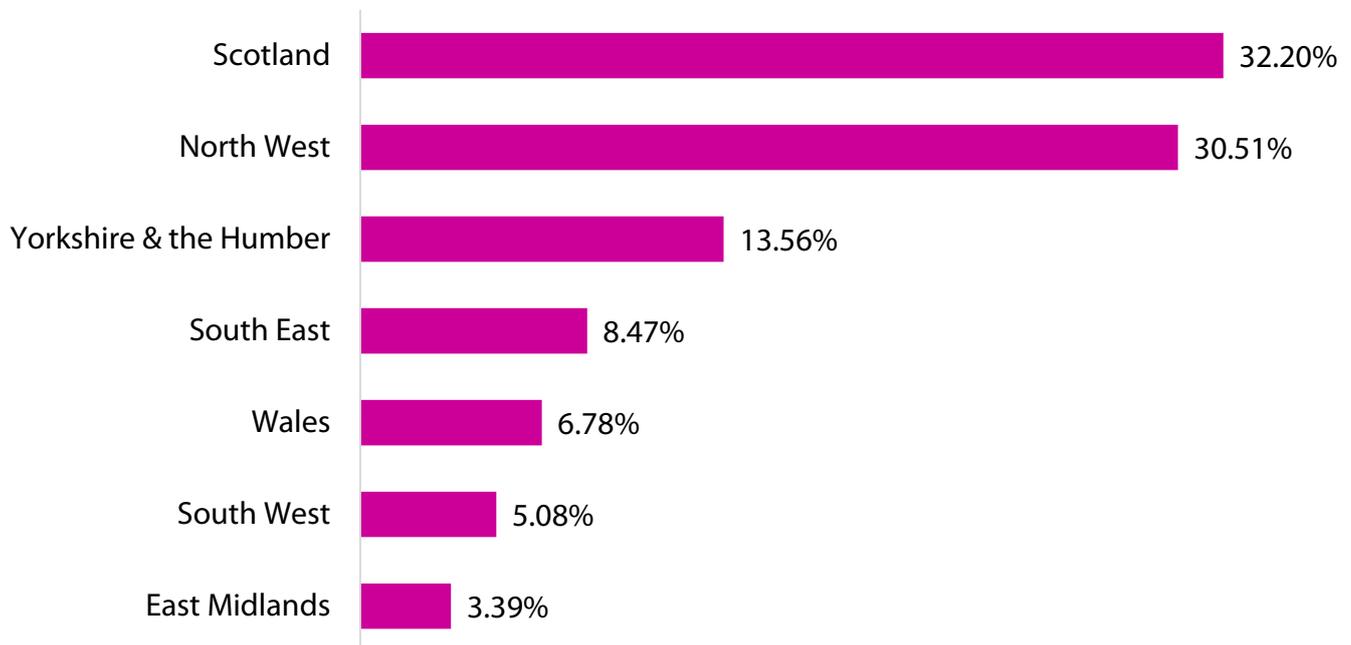
Introduction

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

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

There were 59 responses from local authorities to this survey. Whilst results of the survey may be treated as a snapshot of current opinions of those working in winter Maintenance Services it is possible to explore a light touch trend analysis given the repetition of the APSE Winter Maintenance State of the Market Survey over a number of years.

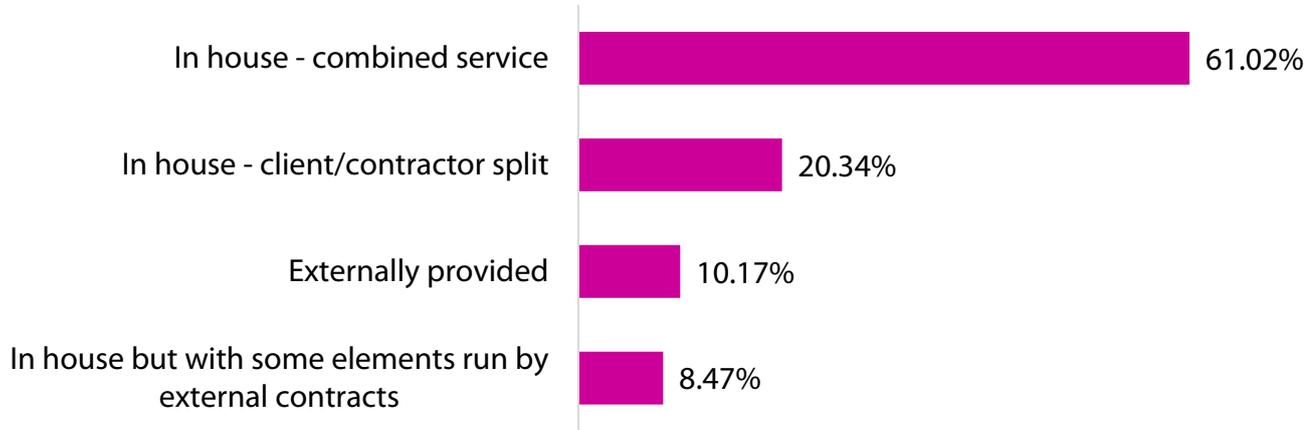
Where in the UK do you work?



The breakdown of responding councils is shown in the graph above.

Section 1 – The Service

How are your winter maintenance services currently delivered?



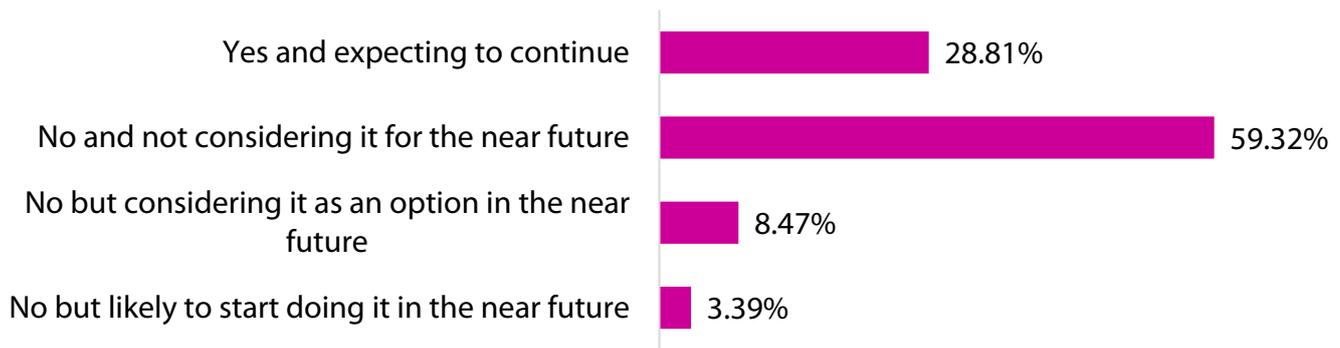
The majority of respondents have an in house combined service (61.02%) or an in house client/contractor split (20.34%) **bringing in-house provision to a cumulative total of 81.36%**. 10.17% have externally provided services and 8.47% have an in-house service but with some elements run by external contracts.

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



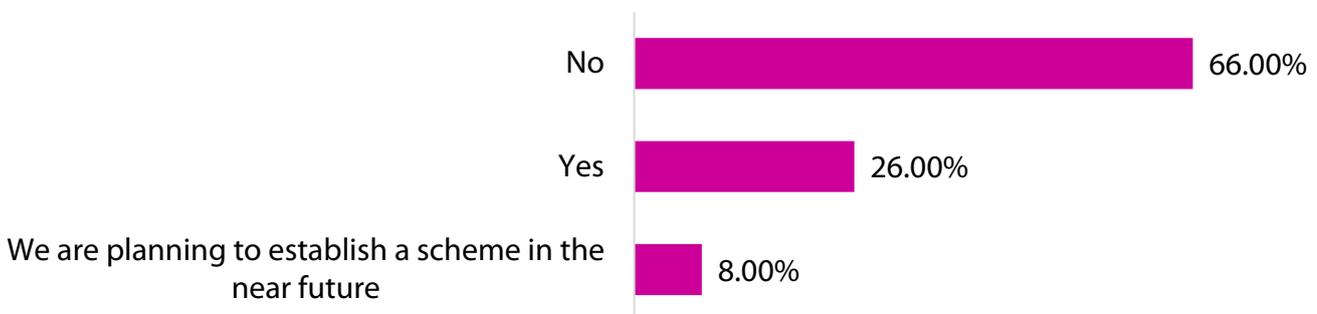
The majority of respondents expect the service to remain in-house over the next 12 months (98.00%).

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



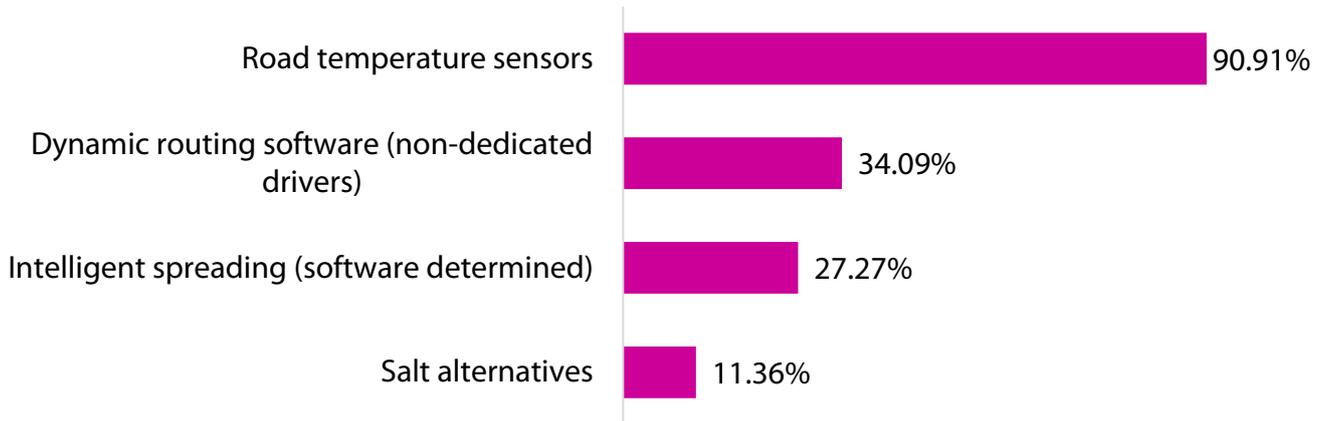
28.81% do currently sell their services to organisations external to the council and are expecting this to continue. 8.47% do not but are considering it as an option in the near future, 3.39% do not but are likely to start doing it in the near future, and 59.32% are not doing this and not considering it for the near future. **These results are not unexpected for essentially a core resilience service since demand would be at its peak at the point where opportunities for external work would also arise. There are however pockets of innovation where councils are the preferred contractor to support local winter resilience in other areas, such as regional airports.**

Do you have a snow warden (or similar) scheme in place?



26% have a snow warden or similar scheme in place, and 8.00% are planning to establish a scheme in the near future. **Whilst there have been some successes with snow warden schemes like other areas which rely on volunteer capacity this can be difficult to sustain, and in this area specifically after milder winters where volunteers may have been inactive for a while.**

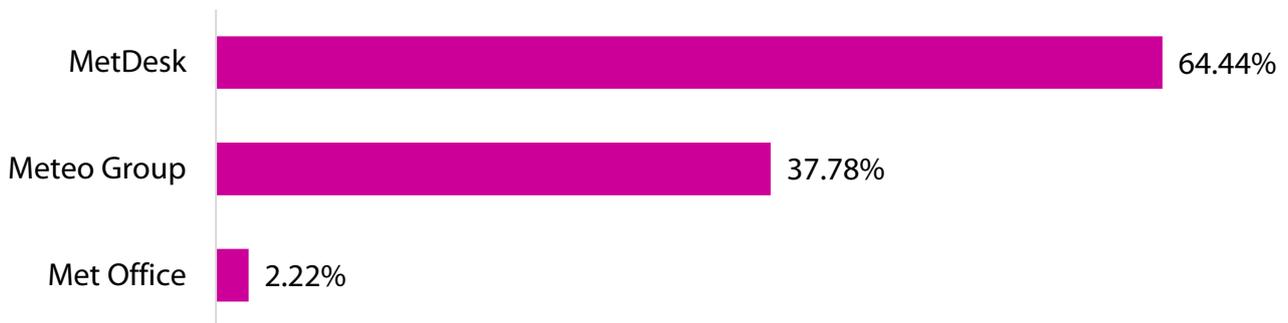
What technology do you use to assist the service? (please tick all that apply)



90.91% use road temperature sensors, 34.09% use dynamic routing software to assist the service, 27.27% use intelligent spreading and 11.36% use salt alternatives. **As technologies continue to development it is anticipated that dynamic routing software will continue to increase.**

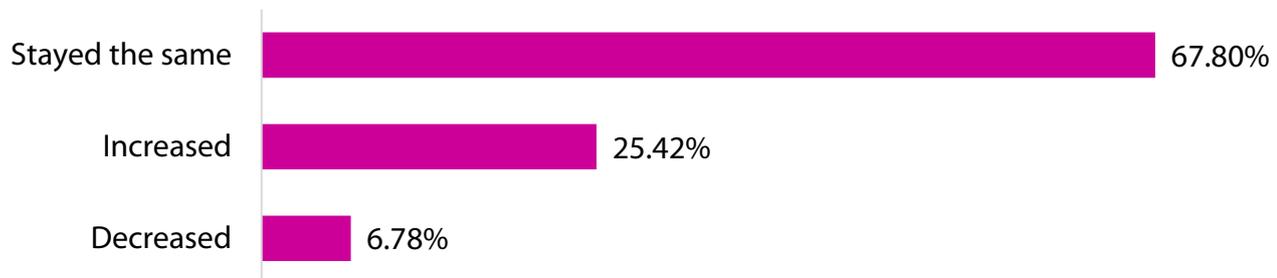
Do you use a weather forecasting service? (If so, which one?)

Among the respondents that use weather forecasting services, 64.44% use MetDesk, 37.78% use Meteo Group and 2.22% use Met Office.



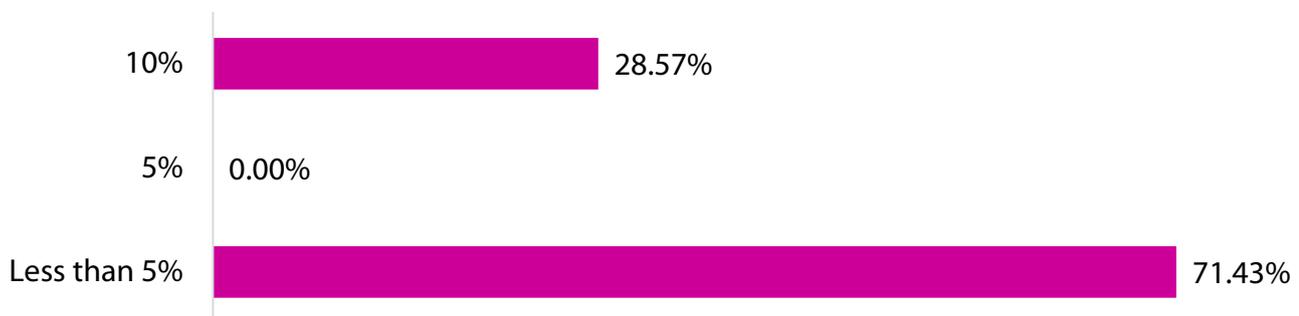
Section 2 – Budget

How has the budget for the winter maintenance service changed from 2020-21 to 2021-22?



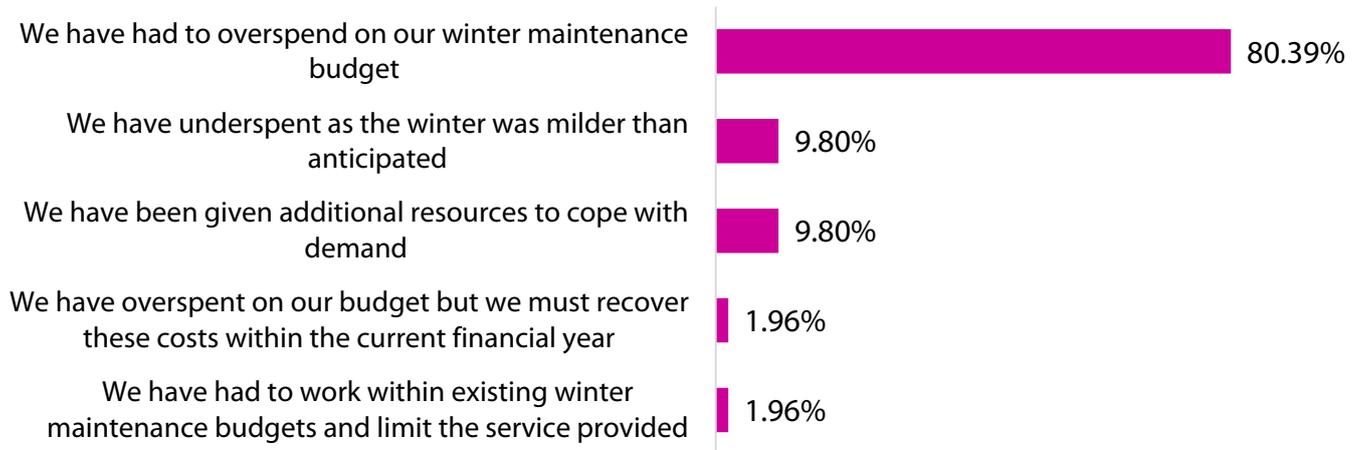
Most respondents indicated that their winter maintenance service budget has stayed the same (67.80%), 25.42% said it has increased and 6.78% said it has decreased.

If your budget has decreased compared to the last financial year, how much has it decreased by?



The majority of respondents' budgets have decreased by less than 5% (71.43%) with the remaining 28.57% experiencing a 10% decrease. Taken with the overall static position on budgets identified above this can be seen as a positive result for the services, with most budgets staying the same and where they have decreased amongst the 6.7% reporting this it is less than 5% in the majority of cases.

With reference to the weather during the winter 2020-2021, what has been the impact on your winter maintenance budget?



The majority of respondents have had to overspend on their winter maintenance budget (80.39%).

Clearly however winter maintenance needs can vary from year to year and tend to operate on the basis of expecting the unexpected, with critical needs in place budget overspends are not uncommon as demonstrated by the survey responses.

If you have a dedicated training budget for winter maintenance, what has happened to it over the past 12 months?

All respondents who have a dedicated training budget for winter maintenance said this had stayed the same (100.00%).

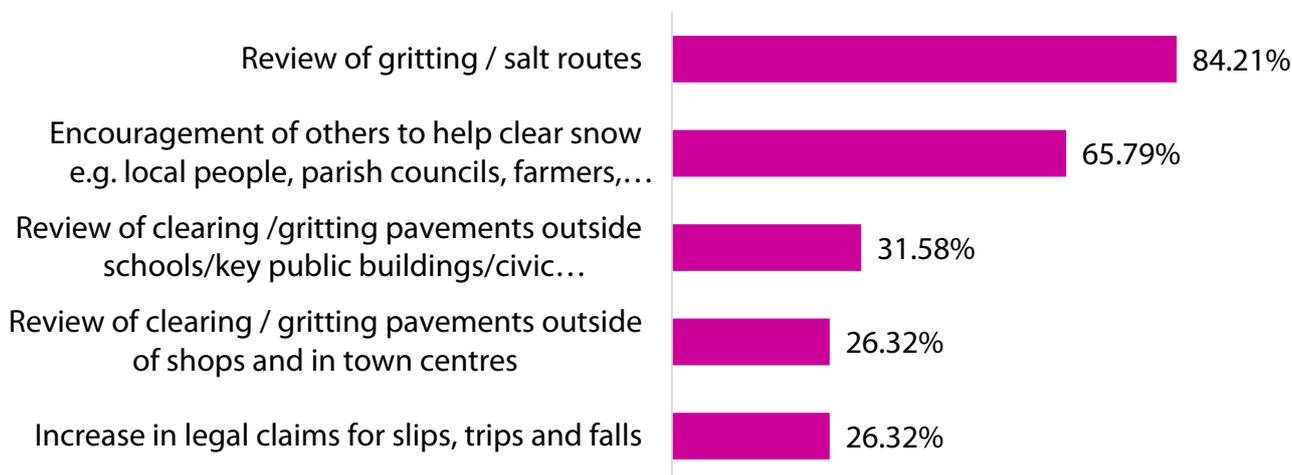
Section 3 – Severe Weather

What changes have you made to service agreements as a result of severe weather over recent years?

Many of the respondents stated that they had made no changes to their service agreements as a result of severe weather over recent years. Some of the changes made include:

- Provision of additional grit bins
- Increased self-help guidance
- Online interactive winter gritting map
- Purchased more reliable vehicles
- Established salt piles across the area for public use
- Introducing liquid de-icer for footways
- Employing contractors to assist with extreme weather conditions
- Route optimisation
- Improved forecasting
- Appointed and trained a reserve team to cover winter maintenance should COVID-19 reduce capacity

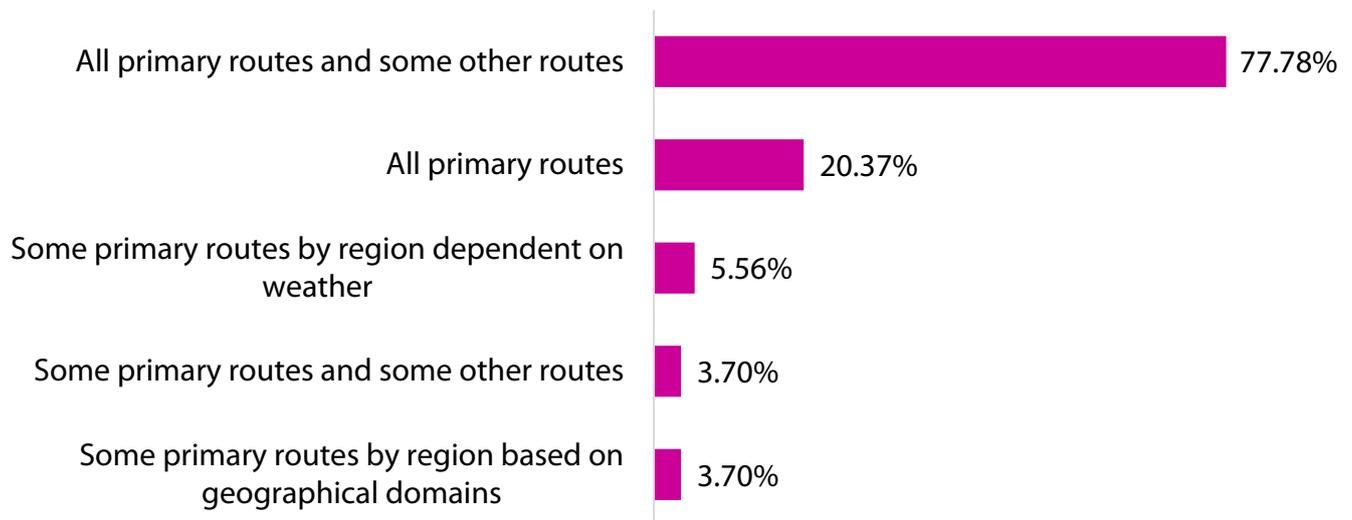
Has the severe weather over the recent years led to any of the following (you may **answer** more than one)?



The severe weather has led 84.21% to review gritting / salt routes, 65.79% of respondents to encourage others to help clear snow (e.g. local people, parish councils, farmers), 31.58% to review clearing / gritting pavements outside schools / key public buildings / civic centres / residential homes and 26.32% to review clearing / gritting pavements outside of shops and in town centres. 26.32% have also seen an increase in legal claims for slips, trips and falls.

Section 4 – Salting

With regard to your road network, which of the following are salted?



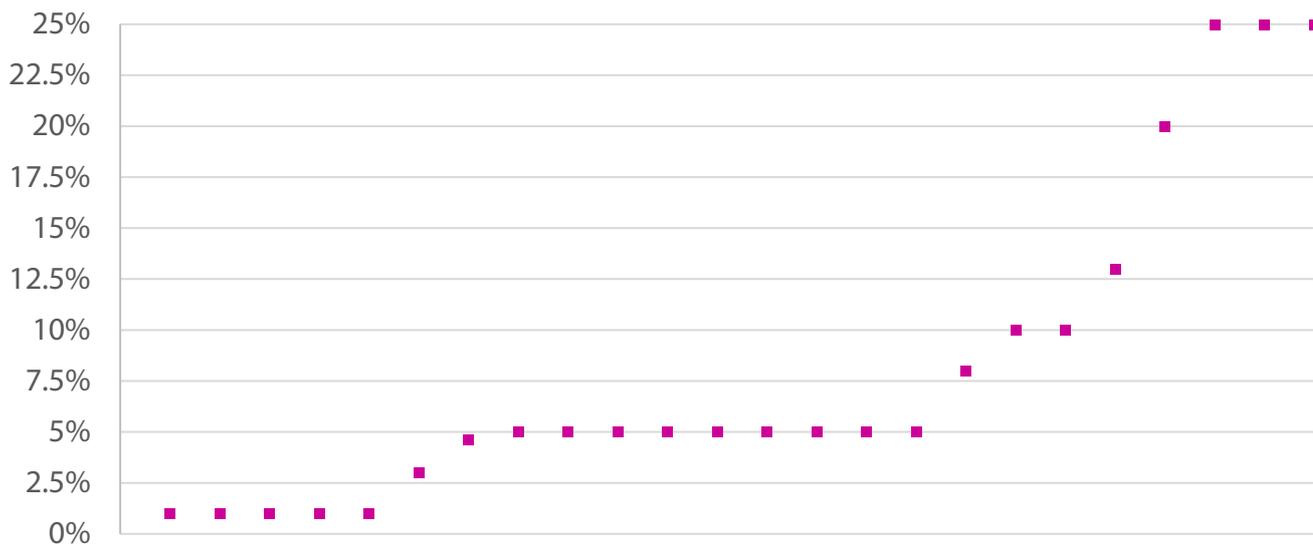
77.78% of respondents salt all primary routes and some other routes, and 20.37% salt only all primary routes. Other variations in approach are shown in the table above.

Do you salt footways?



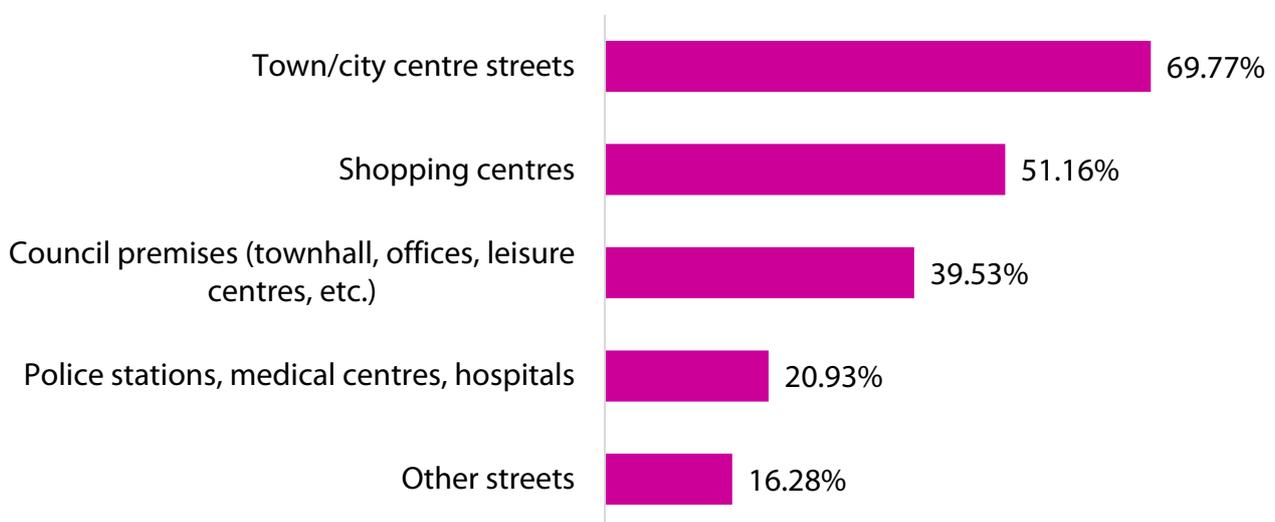
42.59% of respondents salt footways after ice has formed and 40.74% do this as a precautionary measure following forecast. 16.67% do not salt footways. **This can often be a contentious issue in terms of managing both public expectations and local geography and demographic profiles in areas.**

If you do salt footways, approximately what percentage of the footway network do you salt?



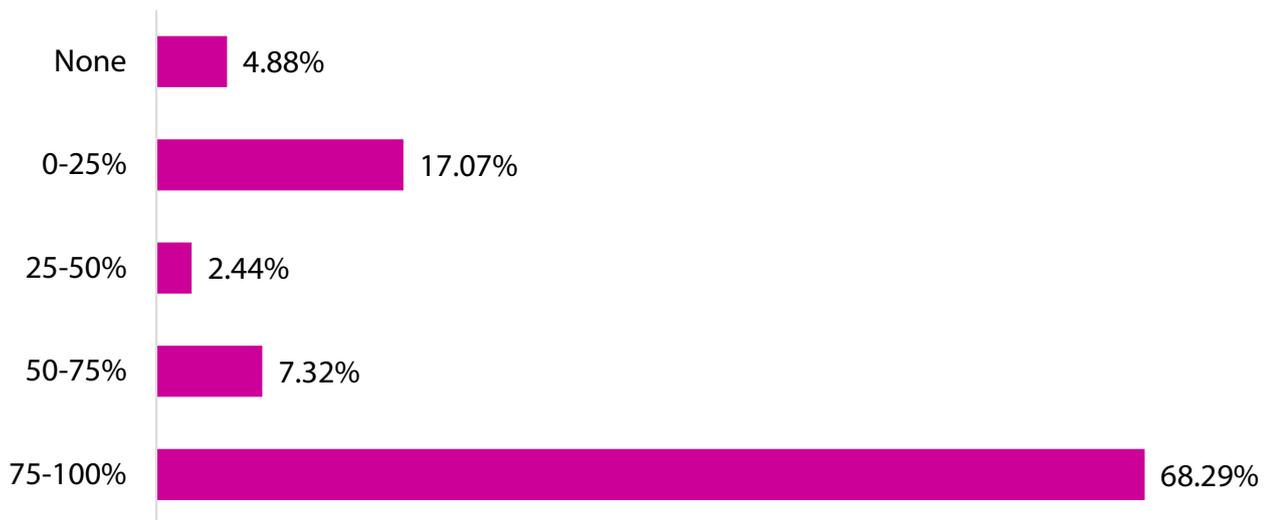
The percentage of footway network salted for most authorities was roughly 5% or under, although several salted around 10% of footways and three respondents reported that they salt 25% of their footways.

If you do salt footways, which of these do you salt?



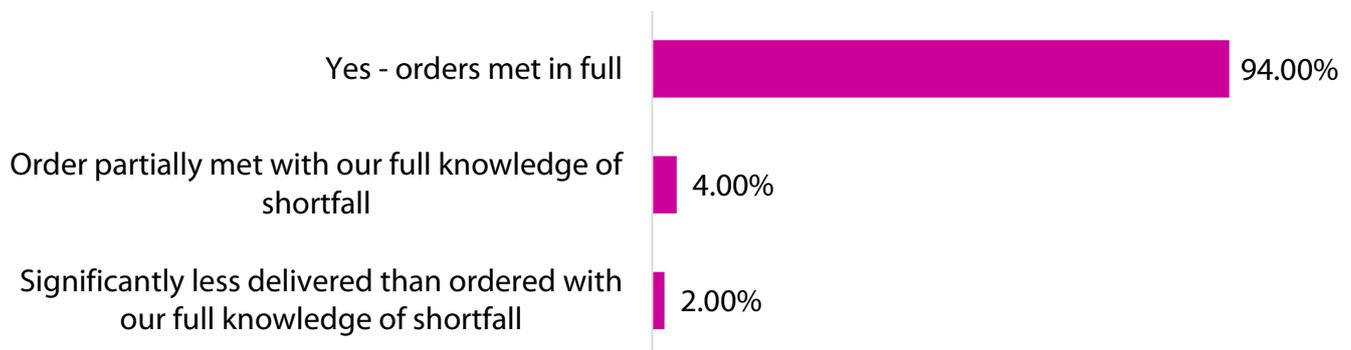
The majority of respondents salt the footways of town/city centre streets (69.77%) and shopping centres (51.16%). 39.53% salt council premises (town hall, offices, leisure centres, etc), 20.93% salt police stations, medical centres and hospitals and 16.28% salt other streets.

What proportion of necessary footway salting do you consider was achieved?



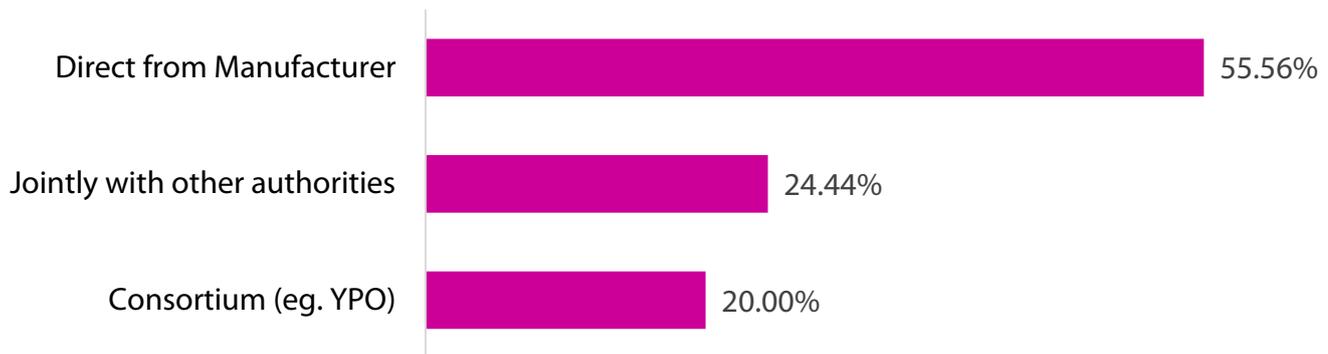
Most of the respondents managed to carry out between 75-100% of necessary footway salting (68.29%), with 7.32% carrying out 50-75%, 2.44% carrying out 25-50% and 17.07% carrying out 0-25%. 4.88% carried out none of the necessary footway salting.

Have the orders you placed for salt to cover winter maintenance over 2020-21 been met by your suppliers?



94.00% of survey respondents salt orders were met in full to cover winter maintenance over 2020-21. This is again a positive outcome but equally should be read against a relatively milder winter, and in recognition that the shortages on supplies will of course occur in more severe winters.

How do you purchase salt supplies?



55.56% purchase salt directly from the manufacturer, 24.44% purchase salt jointly with other authorities and 20.00% purchase salt through a consortium.

Which company supplies your salt?

- Compass Minerals
- ICL UK (Sales) Limited
- Peacock Salt
- Irish Salt Mining
- Salt Union
- Cleveland Potash

Most of the responding authorities were supplied by Compass Minerals **but there a range of other suppliers within the market and referenced by respondents.** **ROB NB removed the numbers game given sponsorships!!**

Do you have any suggestions for how councils or suppliers can act to avoid salt shortages in times of very bad weather in future?

Suggestions provided by local authorities include:

- Thermal mapping to avoid unnecessary treatments
- Consortiums and mutual aid
- Ensure salt stock is replenished during summer
- Consider building a secondary salt barn
- Use pre wetted technology
- Monitor stock take throughout the season

Section 5 – Opinions

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

There were several respondents who did not see any growth areas for the service over the next 12 months. Some of the growth areas identified by others include:

- Automated salt spreading
- Artificial intelligence
- Active travel
- Route optimisation
- Requests for grit bins
- Increase in private works
- Footway and cycleway treatments
- Car Park salting
- Testing of electric and hydrogen fleet
- Expanding the highway network

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

Many authorities commented that they do not see any areas where demand will be less. Commonly anticipated decreases are shown on the list below:

- Less internal gritting operations
- Budget reductions affecting the whole service
- Numbers of grit bins
- Retaining drivers

APSE Analysis

Winter maintenance services are highly visible and open to criticism if things go wrong, given that visibility. Nevertheless, they are a service which the public genuinely relies upon and as such budgets are carefully monitored to ensure service demands can be met. Whilst traditionally our survey questions have focused on reacting to snow the service is increasing dealing with wider winter resilience issues, especially flood responses. Although we still report budget overspends in this analysis budget allocation appears to remain reasonably stable for over 80% of respondents and this is positive. Stable funding will assist the longer-term planning of the service.

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. Alternatively, you can sign up to the APSE Highways, Street Lighting and Winter Maintenance Advisory Group online 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

