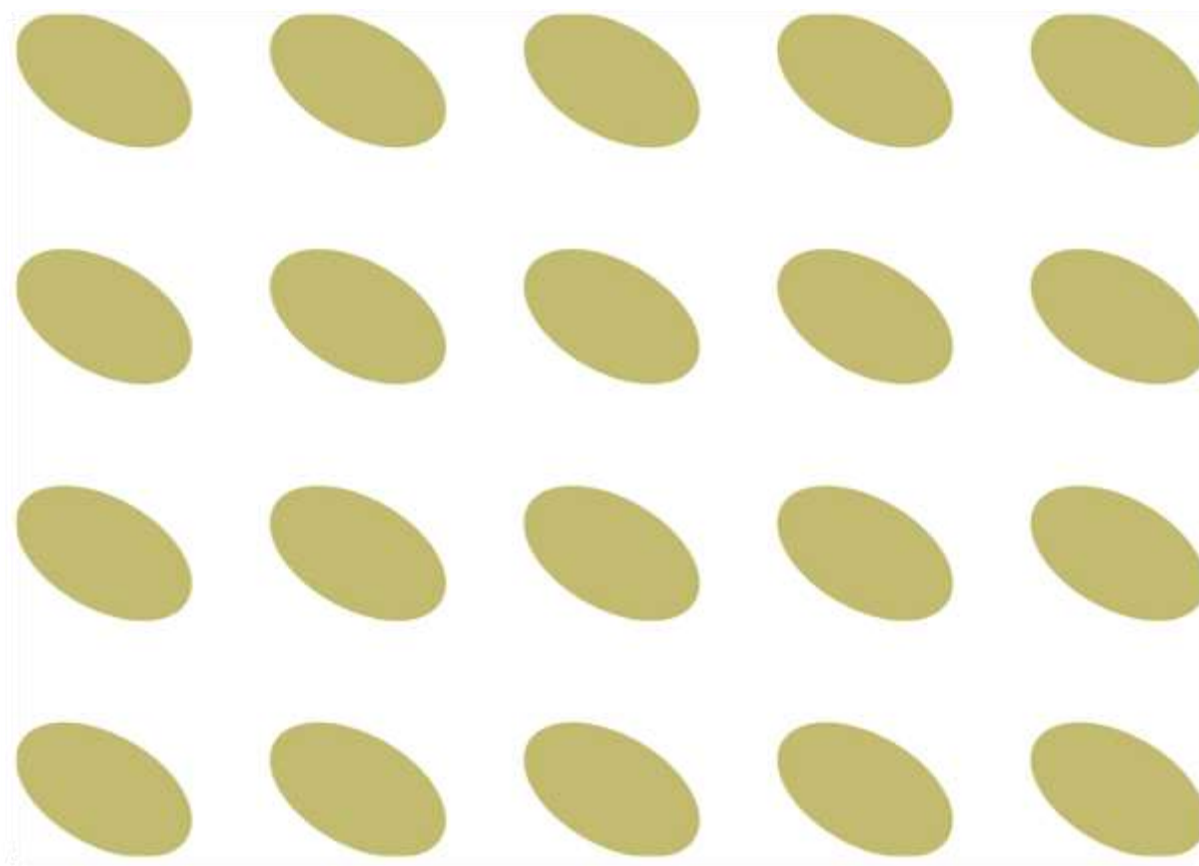


State of the Market Survey 2021

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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We invest in people Gold



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Results at a glance

Vehicles

% utilising Vehicle Tracking Systems	93.48%
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% with an active policy against the purchase of internal combustion powered vehicles	34.09%
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Workload

% expecting the workload of the transport section to increase over the next 12 months	78.38%
---	---------------

Budget

% whose Fleet service budget has decreased from the last financial year	17.95%
---	---------------

% expecting the Fleet service budget to decrease for the next financial year	20.51%
--	---------------

% whose Fleet maintenance training budget has decreased over the past 12 months	13.89%
---	---------------

Staffing

% offering a salary sacrifice scheme for vehicles for employees	40.91%
---	---------------

% who personally feel staff absence levels are not at an acceptable level	27.03%
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% who run an apprenticeship scheme	83.78%
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Average age of operational workforce	47.72 years
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Average basic hourly rate of fitters	£14.52
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The Service

% adding additional electrical supply capacity to charge Electric Vehicles in 1 or 2 years	74.36%
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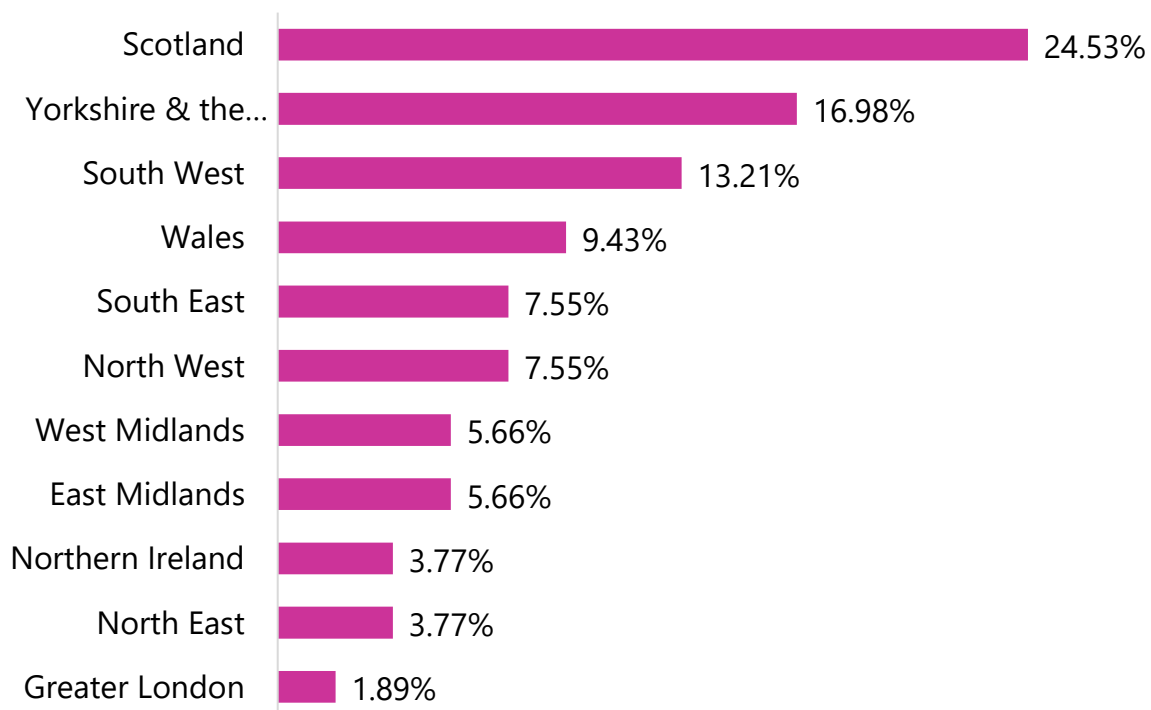
Transport

State of the Market 2021

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 Transport services.

State of the Market surveys are an attempt to understand perceptions of the market amongst people directly involved in delivering services. Whilst results of the survey should be treated as a snapshot of current opinions of those working in Transport services analysis is also shaped by other APSE datasets including APSE Performance Networks

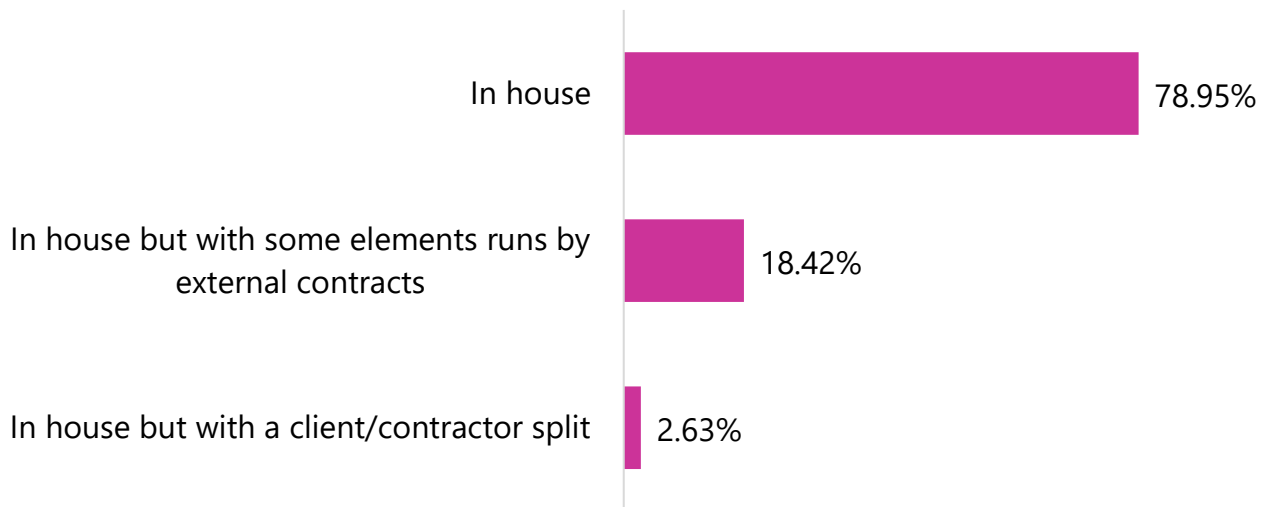
Where in the UK do you work?



The respondents cover the entire UK and reflect those authorities who run their transport maintenance as an in-house operation.

Section 1 - The Service

How are your Fleet services currently delivered?



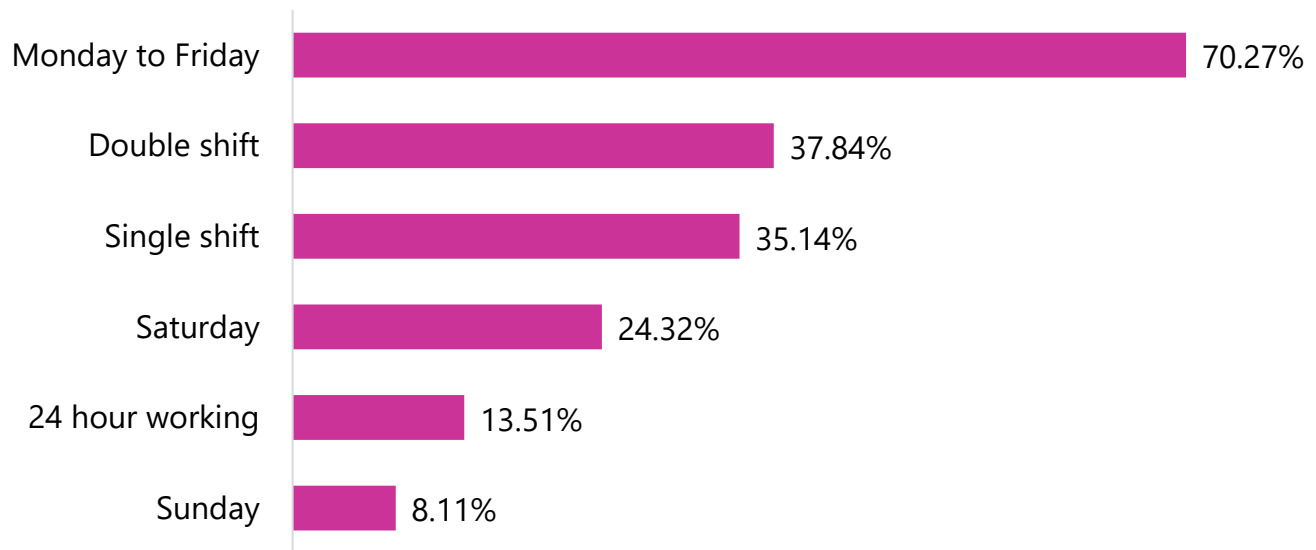
78.95% of Fleet services are delivered in-house, 18.42% are delivered in house but with some elements run by external contracts and 2.63% are delivered in house but with a client/contractor split.

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



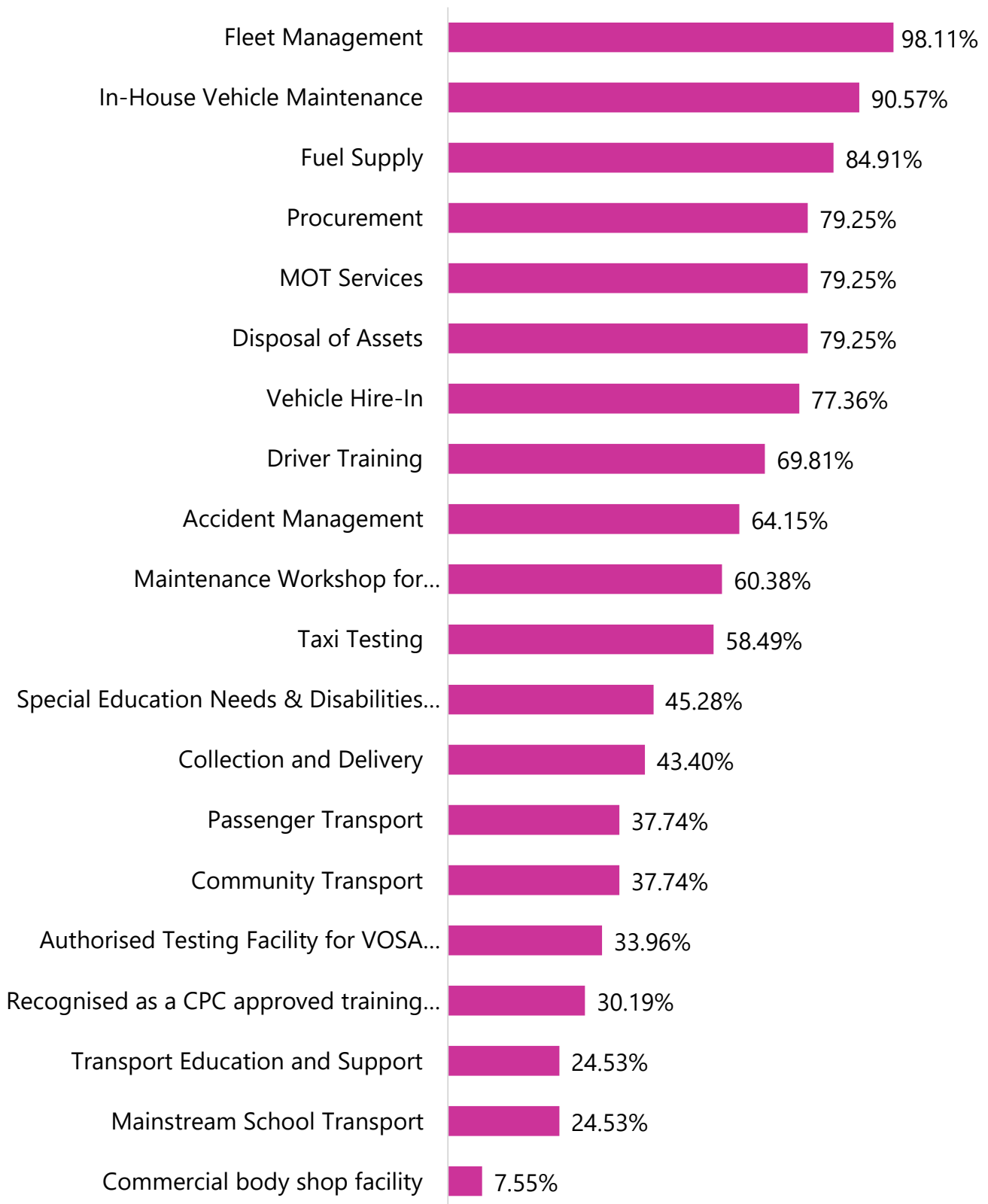
97.37% of those who currently provided in-house services expect them to remain in-house over the next 12 months.

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



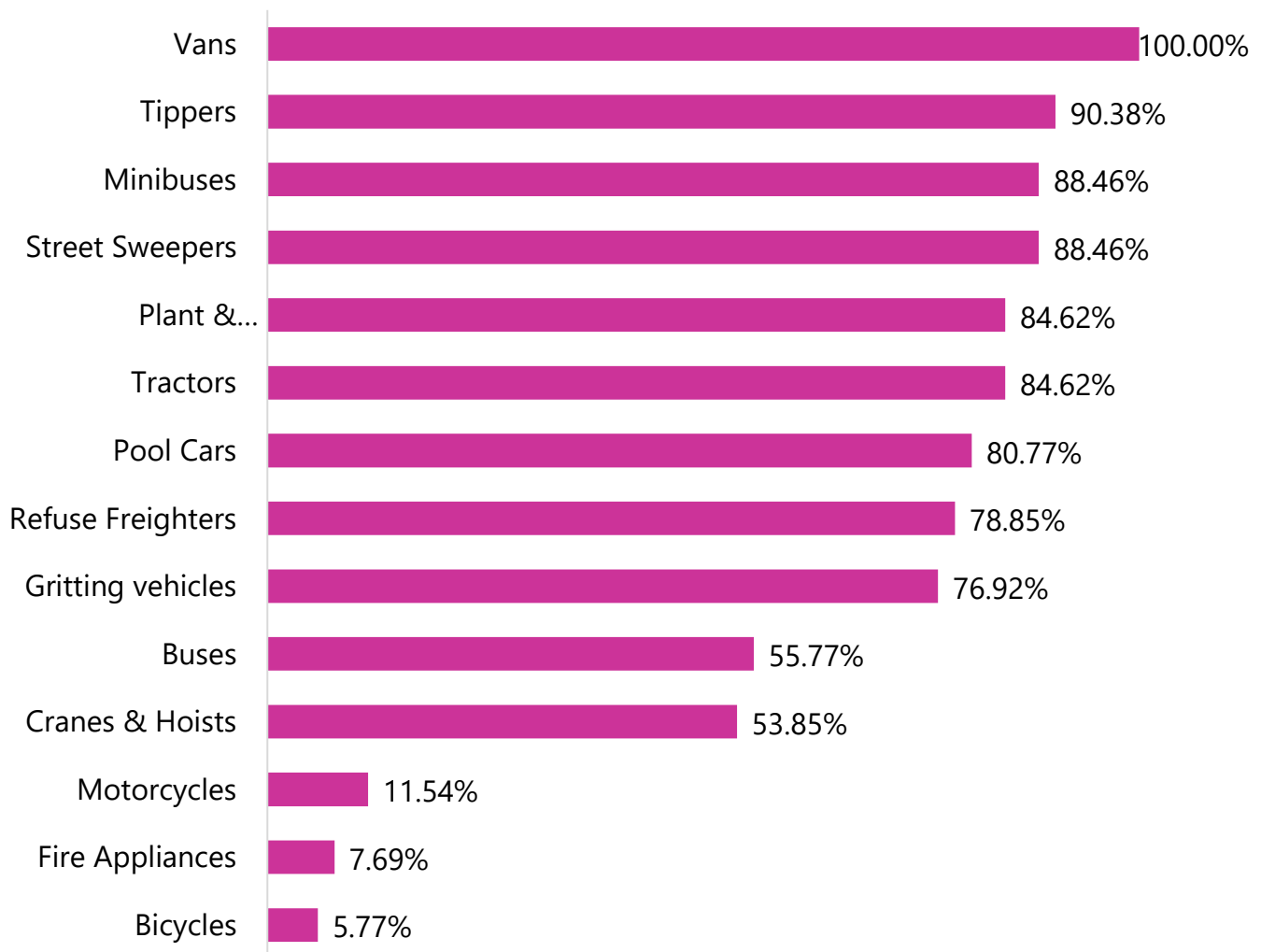
Most respondents operate a Monday to Friday shift system for the maintenance garage (70.27%) with 24.32% open on a Saturday and 8.11% open on a Sunday. 35.14% use single shifts, 37.84% use double shifts and 13.51% have 24 hour working.

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.

Which types of vehicles do you maintain?



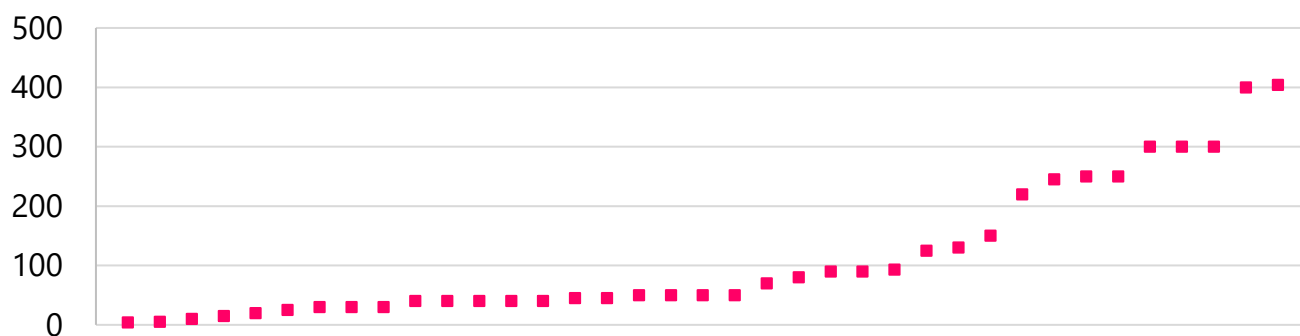
The table above shows the range of vehicle types maintained by responding councils. Other vehicle types mentioned by respondents included electric vehicles, trailers, emergency response vehicles and road haulage distribution vehicles.

Do you utilise Vehicle Tracking Systems?



93.48% of respondents do utilise Vehicle Tracking Systems.

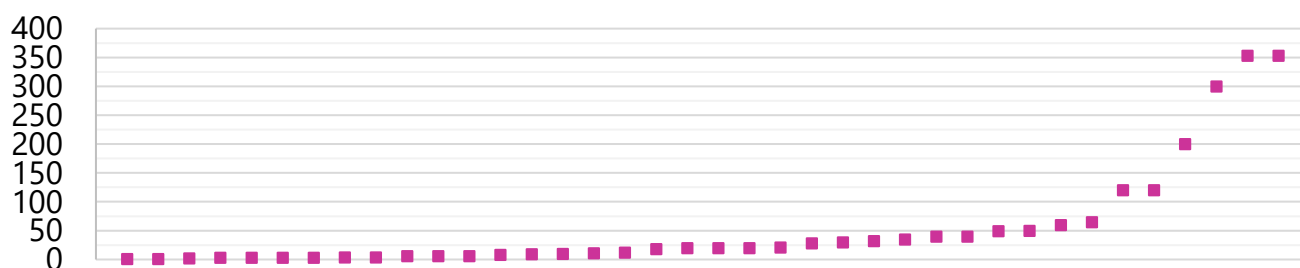
How many vehicles are fitted with video recording systems?



Respondents reported having anywhere from 4 vehicles up to 465 vehicles, with a median of 50.

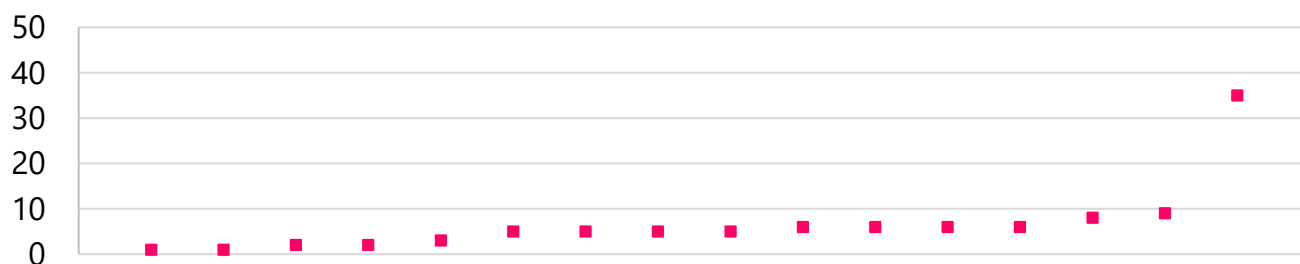
Do you own any electric or alternatively fuelled vehicles?

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 353 with a median of 20. Contrast this with 2019 when the median was 6 electric vehicles and we can see a substantial rise across local authority fleet

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 50 with a median of 5.

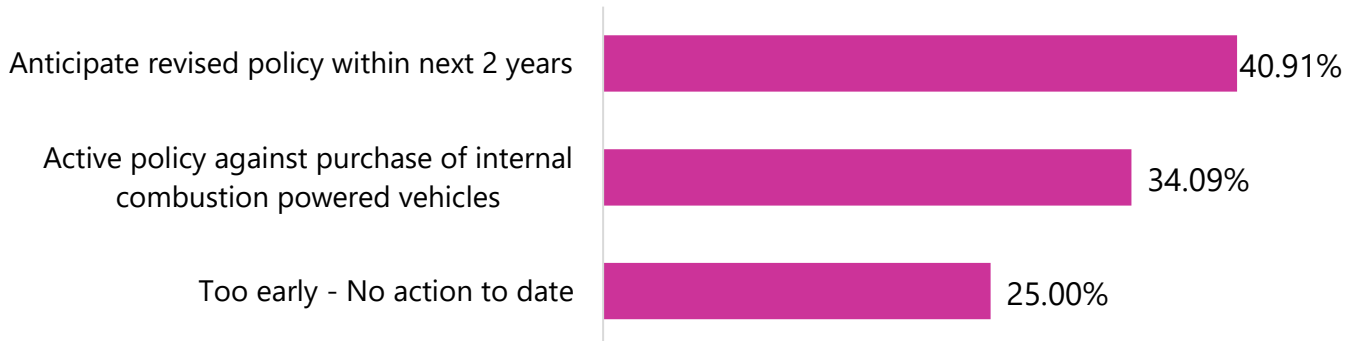
LPG

Only 1 of the survey's respondents were using LPG vehicles of which they only had 2.

Hydrogen cell

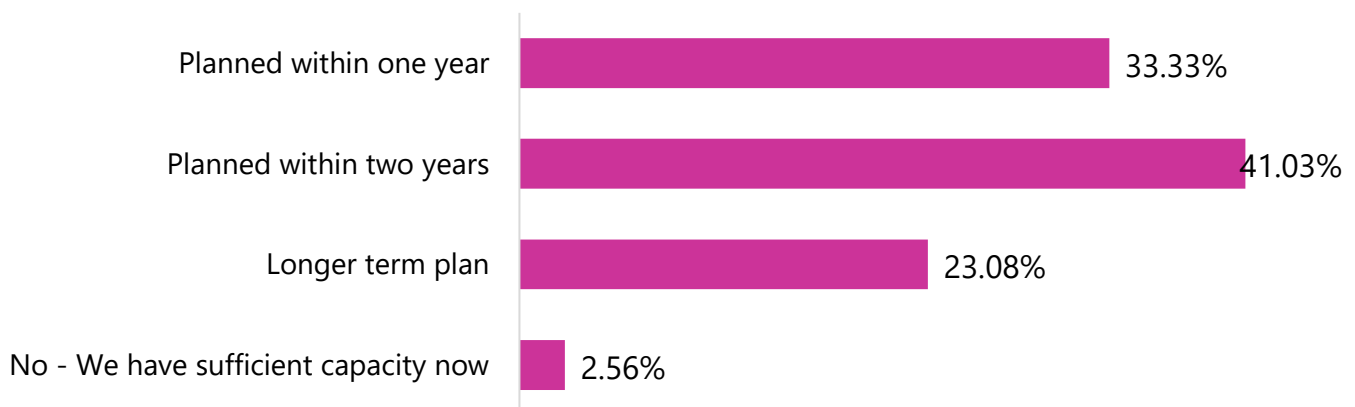
3 of the survey's respondents were using Hydrogen cell vehicles; they had 1, 5 and 5 respectively.

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?



40.91% anticipate that they will have a revised policy within the next 2 years, 25.00% of respondents have not taken any action to date on the plans to end the sale of conventional petrol and diesel cars and 34.09% have an active policy against the purchase of internal combustion powered vehicles. At 75% of respondents are actively pursuing or anticipate pursuing action in this area in the coming two years local authorities appear ahead of the curve in their pursuit of net-zero carbon.

Are you adding additional electrical supply capacity to charge Electric Vehicles?



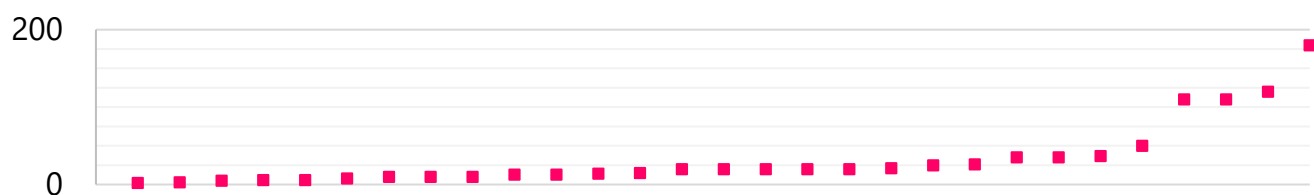
33.33% of respondents are planning to add additional electrical supply capacity to charge electric vehicles within one year, and 41.03% within two years. 23.08% have a longer-term plan for this and 2.56% have sufficient capacity now. It will be interesting to see how the under capacity of the existing electricity grid impacts on future charging stations.

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



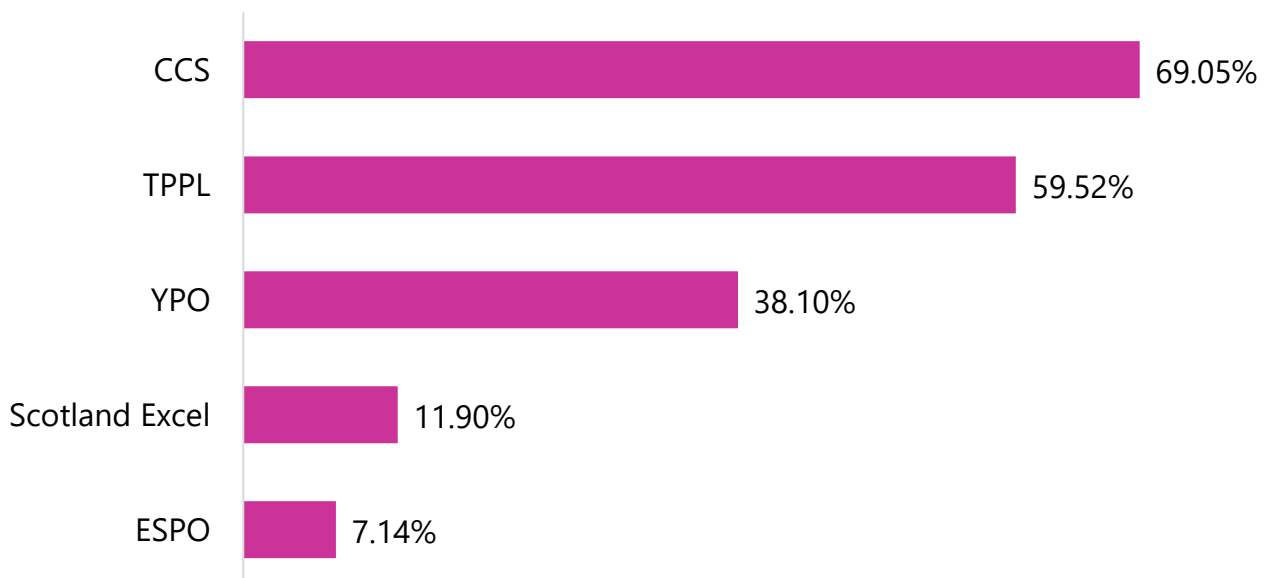
The majority of respondents do not offer a salary sacrifice scheme for vehicles for employees (59.09%), although a significant proportion of responding councils do offer a scheme (40.91%).

How many pool cars do you operate for internal use?



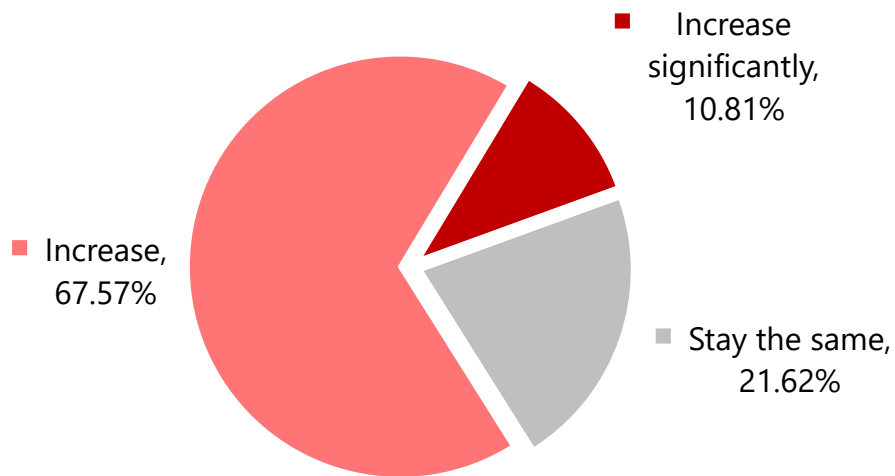
Respondents owned between 2 and 180 pool cars with a median of 20.

Do you use a Vehicle Procurement Framework?



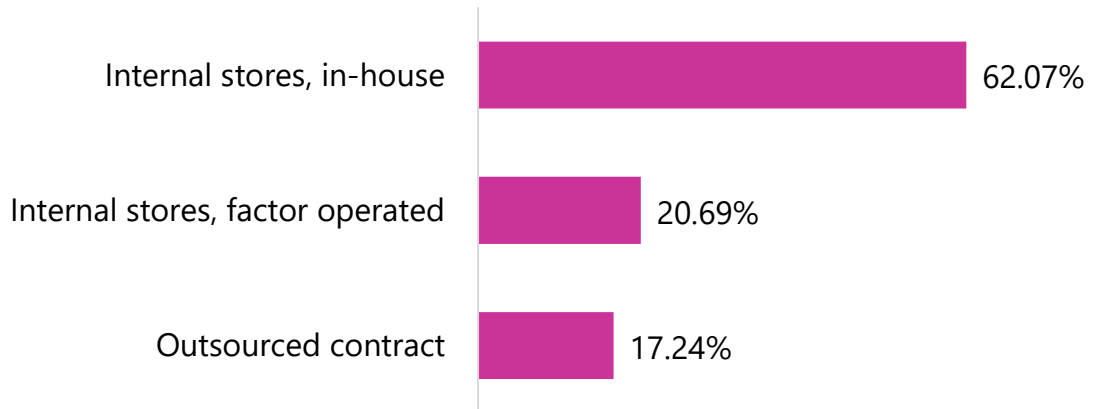
The most popular Vehicle Procurement Framework used by respondents was CCS (69.05%) followed by TPPL (59.52%) and YPO (38.10%). Respondents also reported using Scotland Excel (11.90%) and ESPO (7.14%).

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



67.57% of respondents expect the workload of the transport section to increase and 10.81% expect this to increase significantly. 21.62% expect it to stay the same. No respondents expected it to decrease.

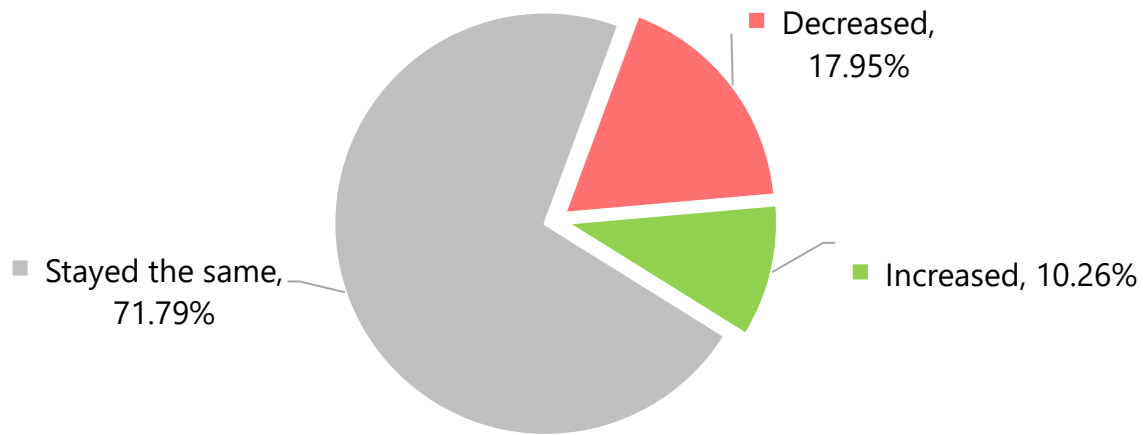
How do you operate your spares system?



62.07% of respondents use internal in-house stores, 20.69% are factor operated and 17.24% have an outsourced contract.

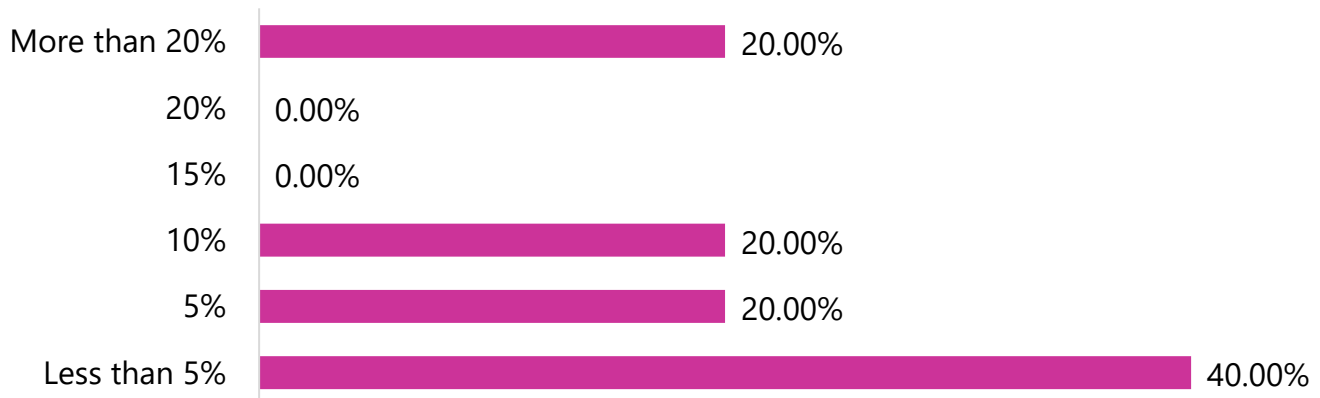
Section 2 - Budget

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



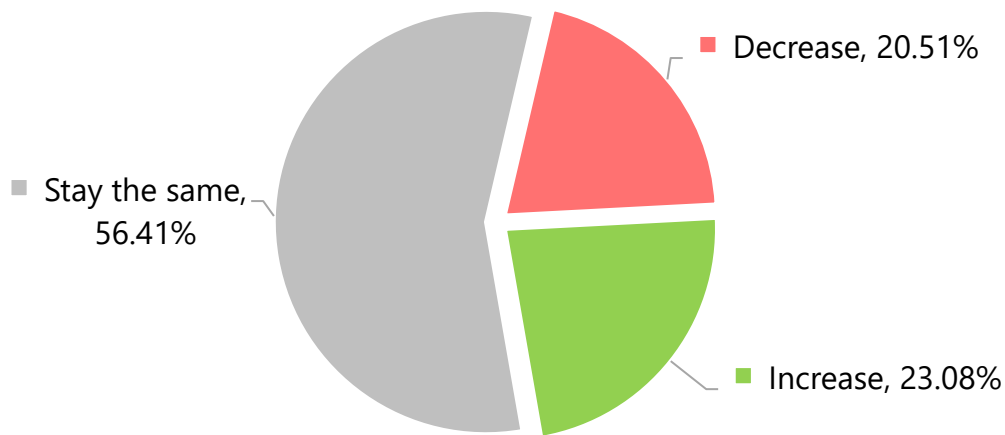
For the majority of respondents, the budget has stayed the same as the last financial year (71.79%). 17.95% reported that their budgets had decreased, and only 10.26% said that it had increased.

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



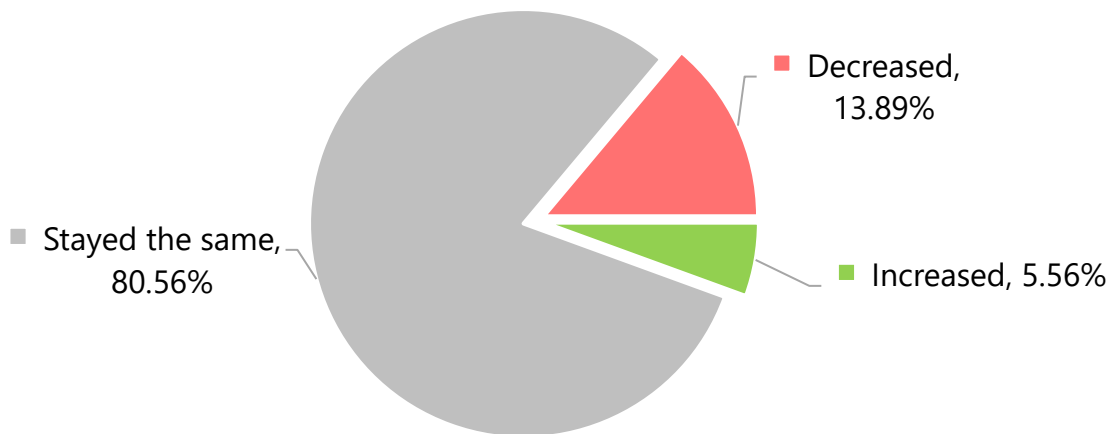
For those responding councils who have decreasing budgets from the last financial year, 40.00% experienced a 'less than 5%' decrease, 20.00% decreased by '5%', 20.00% decreased by '10%' and 20.00% decreased by 'more than 20%'.

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



56.41% expect the budget for the next financial year to stay the same, 23.08% expect it to increase and 20.51% expect it to decrease.

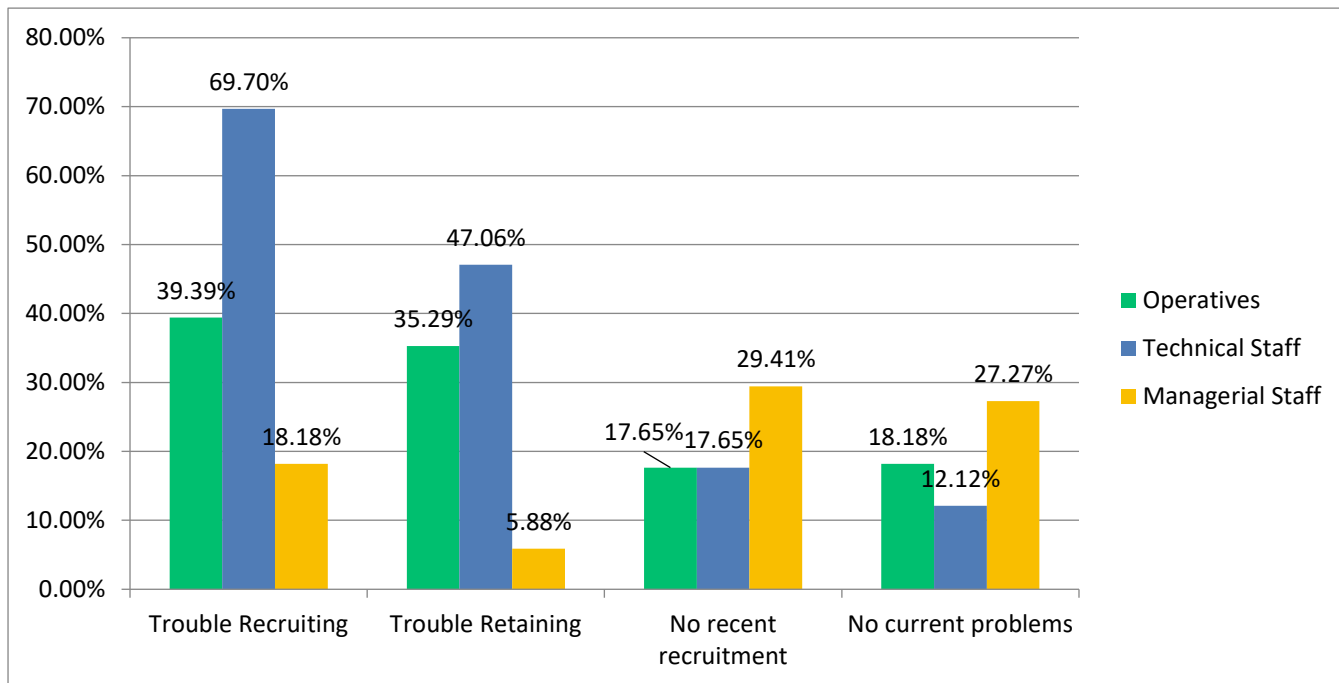
What has happened to your Fleet maintenance training budget over the past 12 months?



Over the past 12 months, most of the respondents' fleet maintenance training budget had stayed the same 80.56%, with 13.89% experiencing a decrease and 5.56% experiencing an increase.

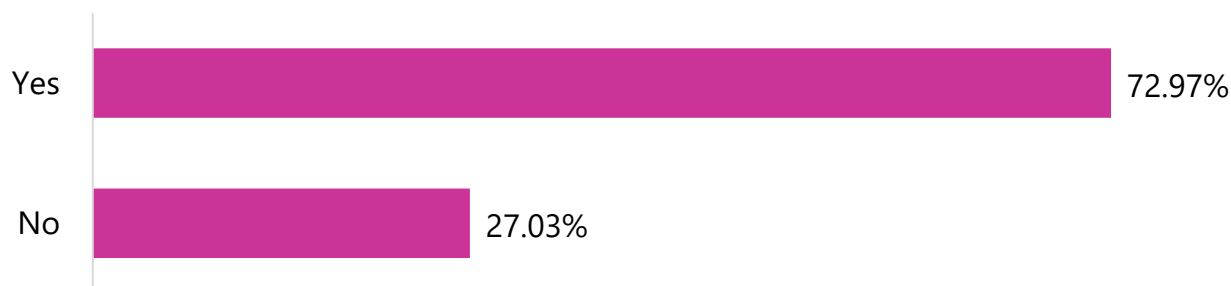
Section 3 - Staffing

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



39.39 % reported having trouble recruiting operatives and 35.29 % had trouble retaining them. 69.70% had trouble recruiting technical staff and 47.06% had trouble retaining them. 18.18% had trouble recruiting managerial staff and only 6.88% retaining them. Clearly there is a real problem with recruitment, requiring a review of both remuneration and wider training for the sector.

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 (72.97%), a large portion of respondents disagreed with this statement (27.03%). In 2019, pre-covid, 43% thought absence rates were unacceptable so 27% is actually a significant improvement, although this could be as a result of people's perceptions of 'acceptable' changing during the pandemic.

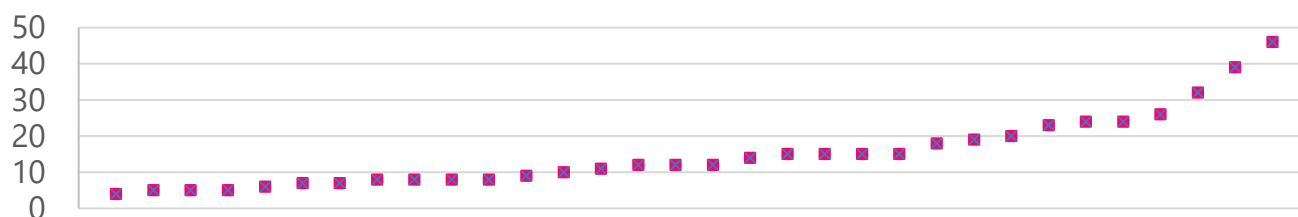
Do you run an apprenticeship scheme?



83.78% of respondents do run an apprenticeship scheme.

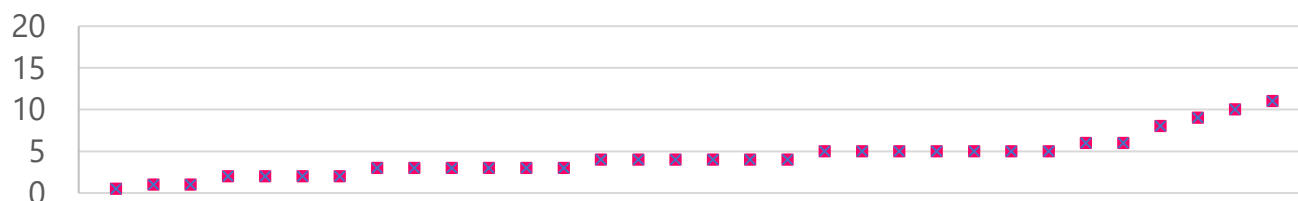
Approximately how many staff do you employ within fleet operations?

Maintenance Fitters



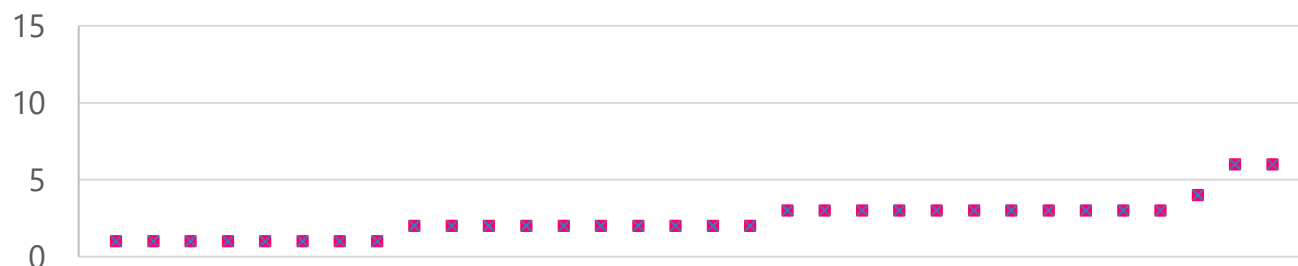
Across responding authorities, the number of maintenance fitters varied considerably from 4 up to 46 with a median of 12. Each council response is shown in the table above.

Technical / Supervisory / Administrative support



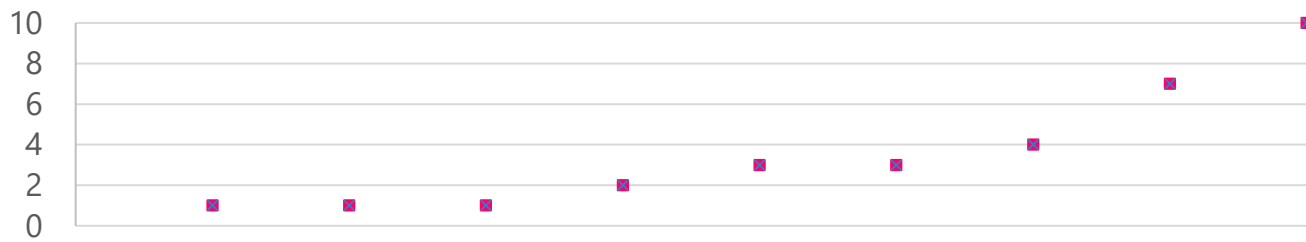
The number of technical / supervisory / administrative staff ranged from 0.5 up to 16 members of staff with a median of 4.

Managerial



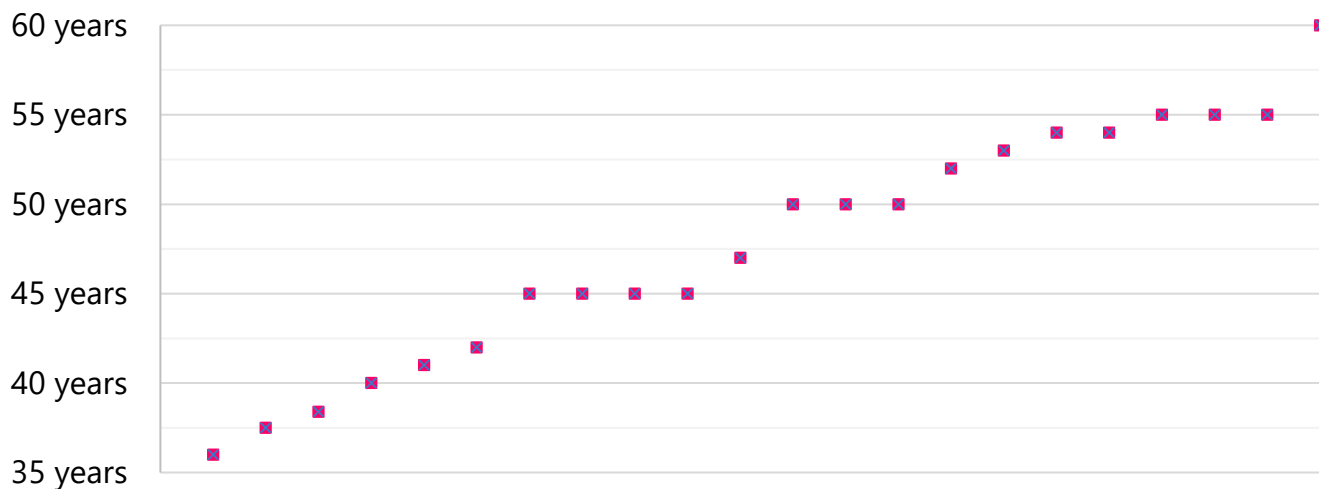
The variance in numbers of managerial staff was from a single part-time managerial position to 12 with a median of 2.

SEN Transport Administration (excluding drivers and escorts)



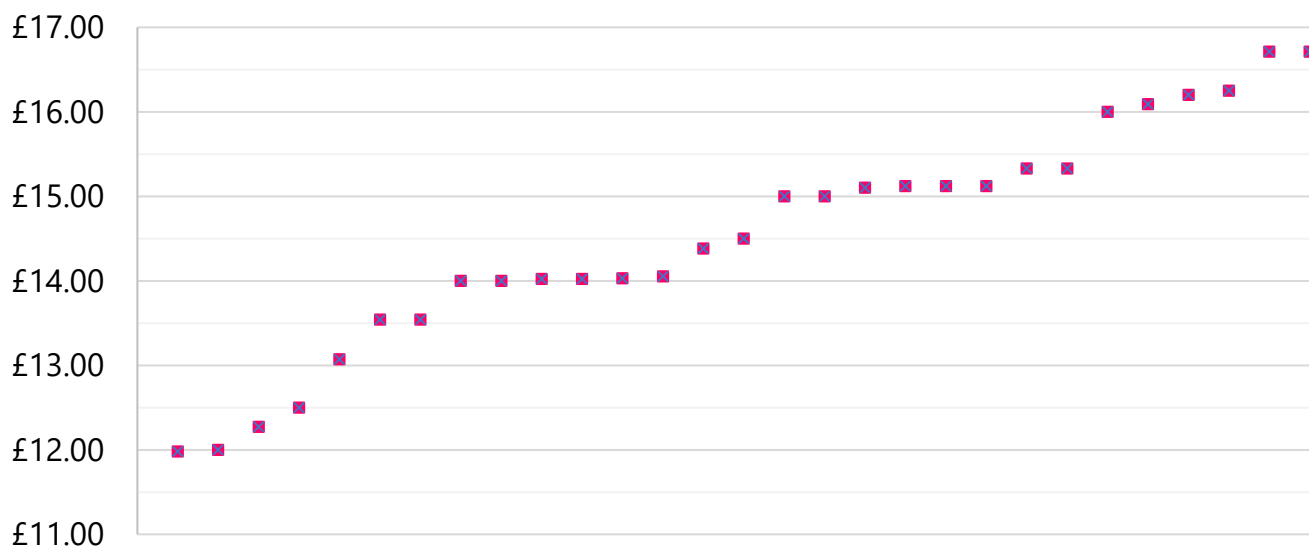
The number of SEN Transport Administration staff per authority ranged from 1 to 10.

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 36 years to a high of 60 years. Across all respondents, the average age was 47.72 years.

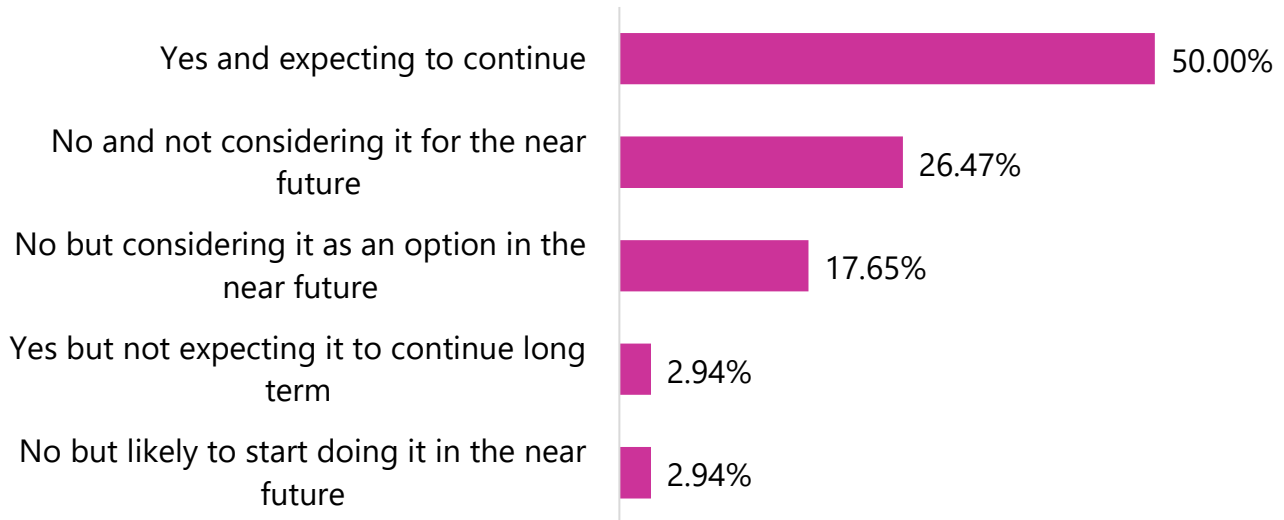
What is the basic hourly rate of pay for your fitters?



The basic hourly rate of pay for fitters ranged from £11.98 to £16.71, with an average of £14.52.

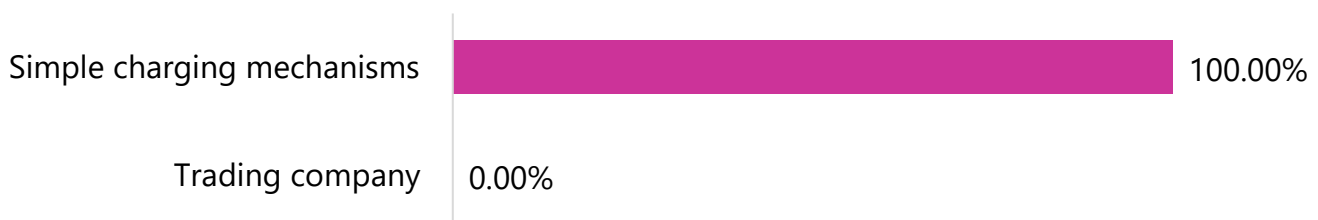
Section 4 – Areas of growth and decline

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 (50.00%), although an additional 2.94% are not expecting this to continue long term. 2.94% are likely to start this in the near future, 17.65% are considering it as an option in the near future. The remaining 26.47% 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:

- SEN and school transport
-
- Taxi testing
-
- Driver training
-
- Alternative fuels and electric vehicles
- Review of fees and charging to customers
- Domestic MOTs
- External vehicle maintenance
- Specialist maintenance work (e.g., gritters)

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:

- Reduced vehicle maintenance because of EVs
-
- Hire and pool cars
-
- Fuel services
- Reduced internal work

Local Authority Transport Services

State of the Market 2021

APSE Comment

At the time this survey was taken, Omicron was unknown and the assumption was that Covid-19 was on a downward path. Transport services has performed well throughout the pandemic with limited impact on service delivery. Councils are making significant strides in delivering their carbon commitments with electric vehicles and seeking solutions for heavier HGVs. Recruitment is an ongoing issue and likely to get worse with an ageing workforce and lack of new mechanics making their career in vehicle maintenance.

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
- Climate Change and Renewable Energy Network
- Environmental Health
- Highways and Street Lighting
- Housing Construction and Building Maintenance
- Local Authorities Commercialisation, Income and Trading Network

- Parks, Horticulture and Grounds Maintenance
- Sports and Leisure Management
- Vehicle Maintenance and Transport
- Waste Management, Refuse Collection and Street Cleansing