

State of the Market Survey 2020

Local Authority Winter Maintenance Services



State of the Market Survey 2020

Local Authority Winter Maintenance services

The state of the market survey was conducted by Rob Bailey, APSE Principal Advisor for Winter Maintenance.

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

For any enquires in relation to the survey, Rob may be contacted on:

Tel: 0161 772 1810

Email: rbailey@apse.org.uk

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.



GB 11409



GB 11132



GB 14074

Association for Public Service Excellence

3rd Floor Trafford House

Chester Road

Manchester M32 0RS

telephone: 0161 772 1810

fax: 0161 772 1811

web: www.apse.org.uk ¹

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 2018-19 to 2019-20?	
• 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 2019-20, 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
• Has the severe weather over the recent years led to any of the following?	
• What changes have you made to service agreements as a result of severe weather over recent years?	
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 2019-20 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	92.50%
% currently selling services to organisations external to the council	36.17%
% with a snow warden scheme (or similar) in place	44.12%
Budget	
% of respondents whose budget has stayed the same from 2018-19 to 2019-20	76.92%
% of respondents who had to overspend on their 2019-20 winter maintenance budget	37.84%
% of respondents who underspent on their 2019-20 winter maintenance budget	35.14%
% whose dedicated training budget had stayed the same	75.00%
Salting	
% whose salt orders were met in full by suppliers over 2019-20	100.00%
% reviewing gritting / salt routes after the severe weather over the recent years	78.13%
% purchasing salt supplies jointly with other authorities	14.71%
Footways	
% salting footways as a precautionary measure following forecast	51.35%
% not salting footways	18.92%
% who had salted 75-100% of necessary footway salting	46.88%
% who had not salted any of the necessary footway salting	3.13%

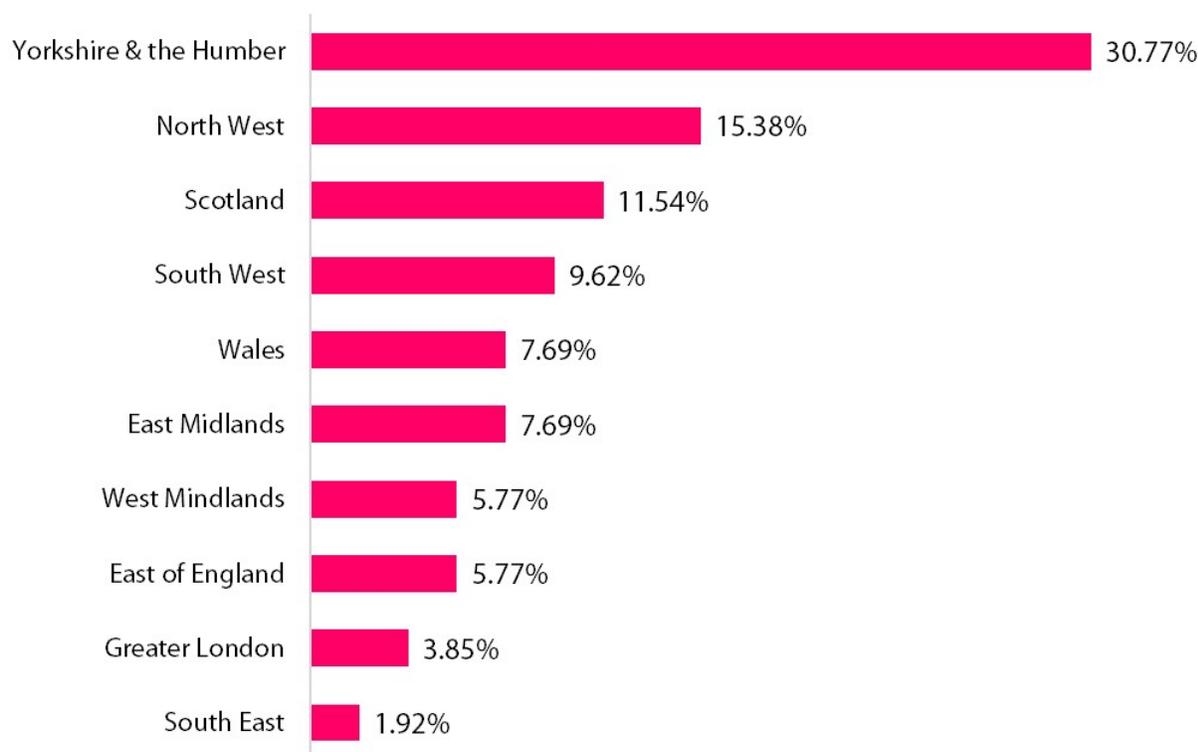
Introduction

APSE conducted an online survey during December 2020. 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 52 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 sports and leisure services rather than a thorough analysis of change over time.

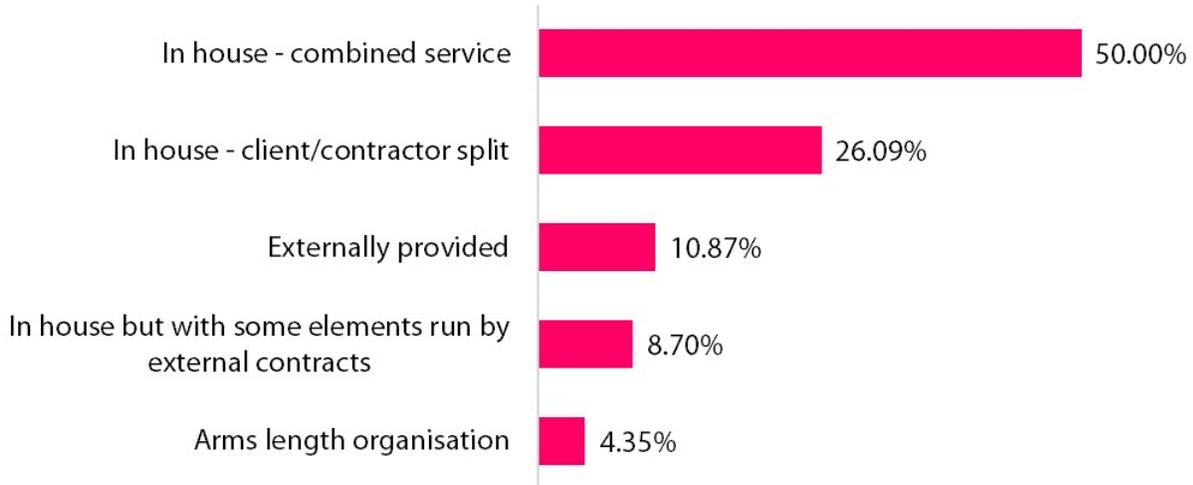
Where in the UK do you work?



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

Section 1 – The Service

How are your winter maintenance services currently delivered?



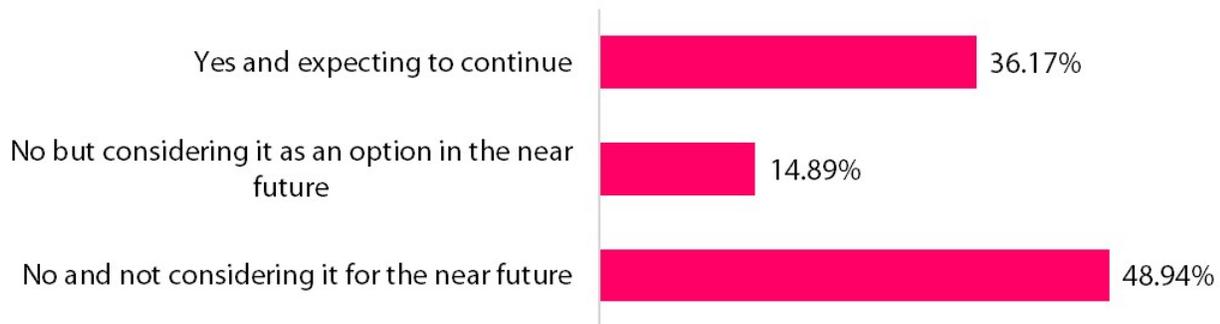
The majority of respondents have an in-house combined service (50.00%) or an in-house client / contractor split (26.09%). 8.70% have an in-house service but with some elements run by external contracts. 10.87% have an externally provided services, and 4.35% have an arm’s length organisation.

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



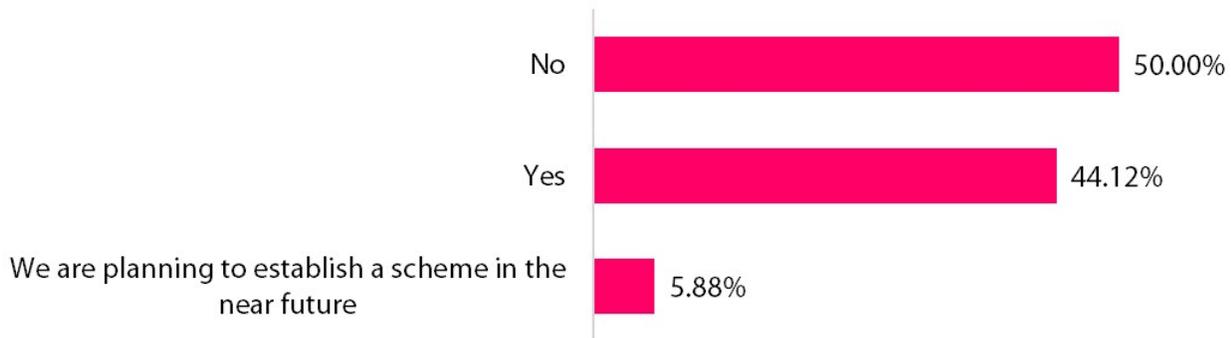
The majority of respondents expect the service to remain in-house over the next 12 months (92.50%).

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



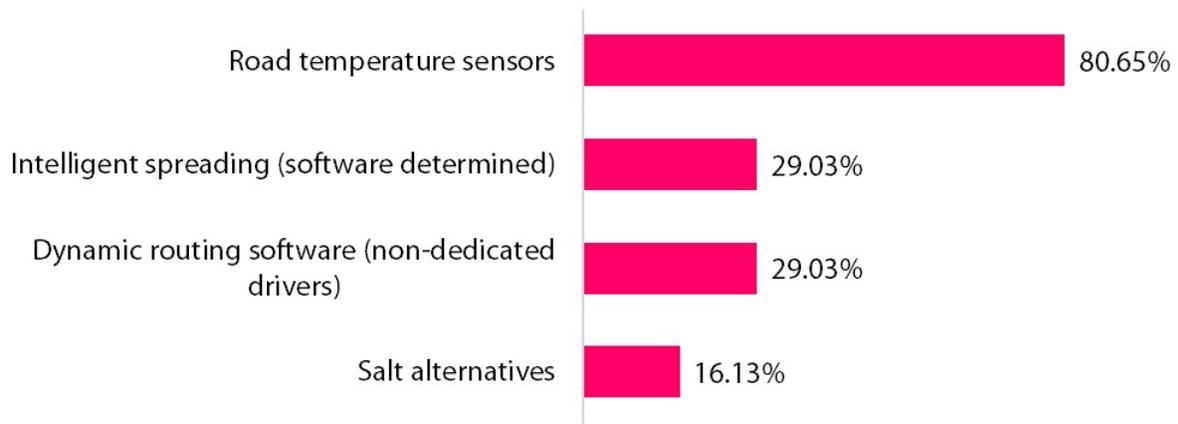
36.17% do currently sell their services to organisations external to the council and are expecting this to continue. 14.89% do not but are considering it as an option in the near future, and 48.94% are not doing this and not considering it for the near future.

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



44.12% have a snow warden or similar scheme in place, and 5.88% are planning to establish a scheme in the near future.

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



80.65% use road temperature sensors, 29.03% use intelligent spreading, 29.03% use dynamic routing software to assist the service and 16.13% use salt alternatives.

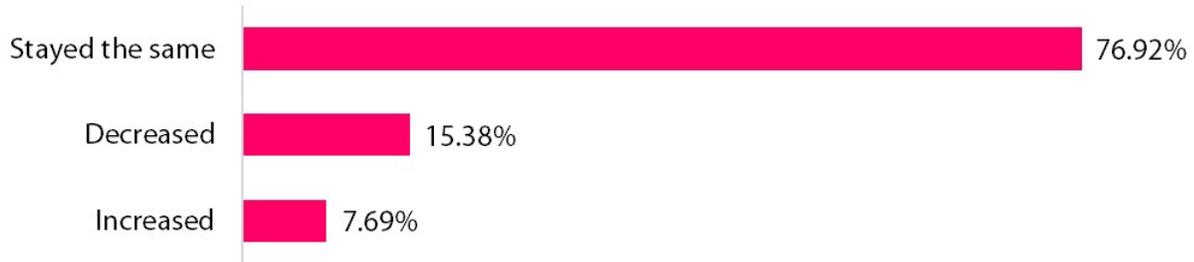
Do you use a weather forecasting service? (If so, which one?)

Among the respondents that use weather forecasting services, 56.25% use Meteo Group, 40.63% use MetDesk and 3.13% use Met Office.



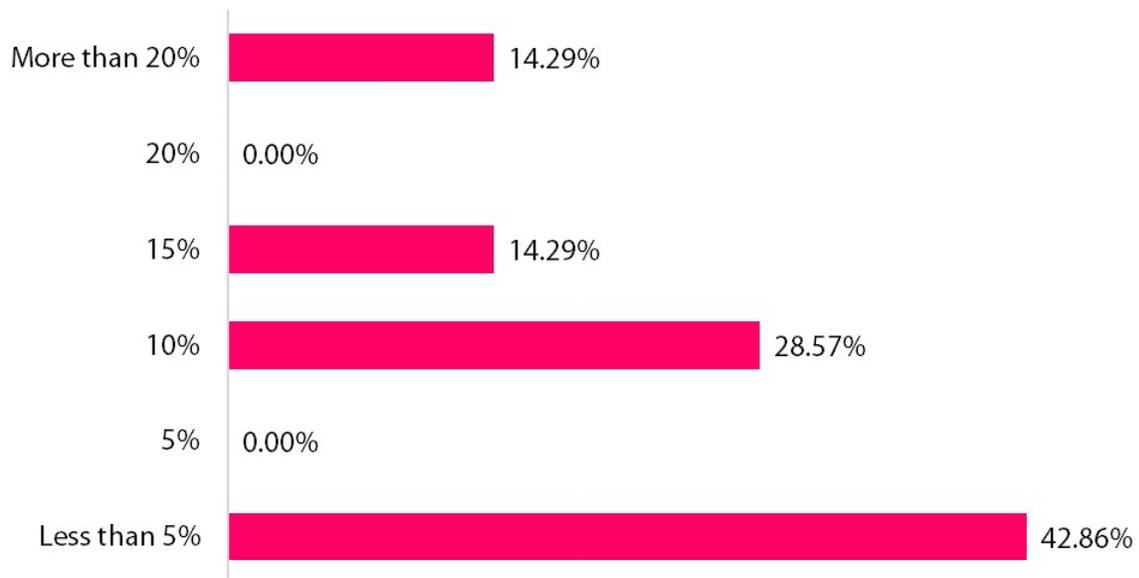
Section 2 – Budget

How has the budget for the winter maintenance service changed from 2018-19 to 2019-20?



Most respondents indicated that their winter maintenance service budget has stayed the same from 2018-19 to 2019-20 (76.92%), 7.69% said it has increased and 15.38% said it has decreased.

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



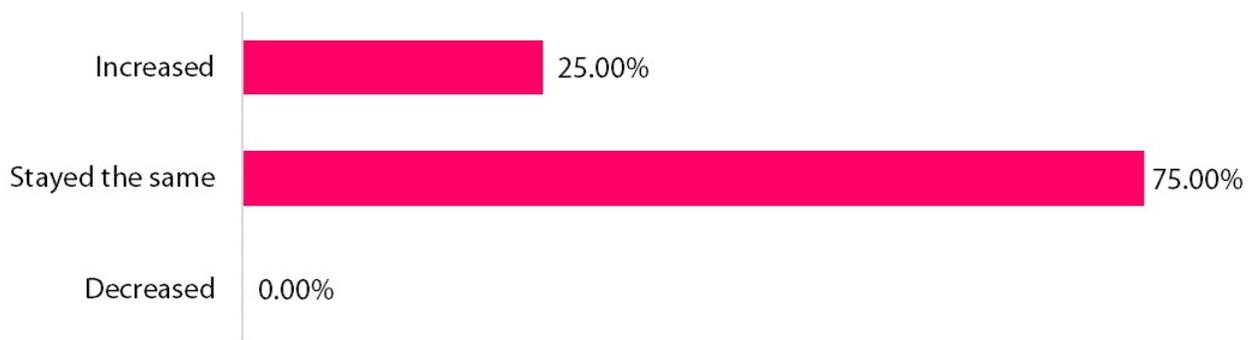
The majority of respondents' budgets have decreased by less than 5% (42.86%), with 28.57% experiencing a 10% decrease and 14.29% experiencing a 15% decrease.

With reference to the weather during the winter 2019-2020, what has been the impact on your winter maintenance budget?



Respondents are split between those who have had to overspend on their winter maintenance budget (37.84%) versus those who have underspent as the winter was milder than anticipated (35.14%); an additional 10.81% were given additional resources to cope with demand whereas 10.81% have had to work within existing winter maintenance budgets and limit the service provided.

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



The majority of respondents who have a dedicated training budget for winter maintenance stated that their budgets have stayed the same over the past 12 months (75.00%). 25.00% have had their budgets increase.

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:

- Increased salt and brine storage
- Reviewed and updated risk-based approach
- Reduced routes
- Improved fleet
- Increase in grit bins
- Increased use of farmers
- Trained additional drivers
- Reviewed spread rates

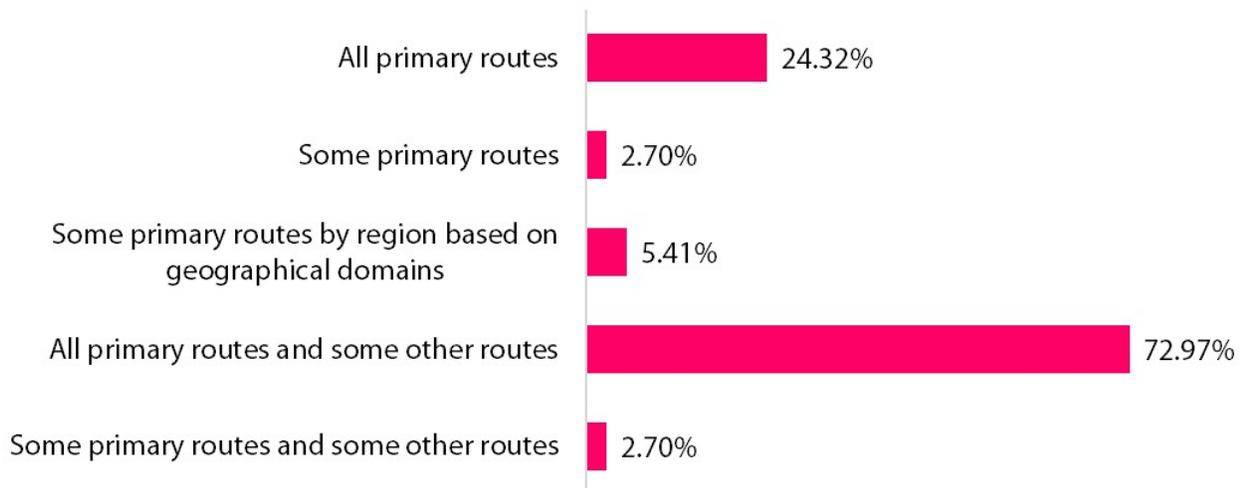
Has the severe weather over the recent years led to any of the following (you may another more than one)?



The severe weather has led 78.13% to review gritting / salt routes, 59.38% of respondents to encourage others to help clear snow (e.g. local people, parish councils, farmers), 50.00% to review clearing / gritting pavements outside of shops and in town centres and 37.50% to review clearing / gritting pavements outside schools / key public buildings / civic centres / residential homes. 12.50% have also seen an increase in legal claims for slips, trips and falls.

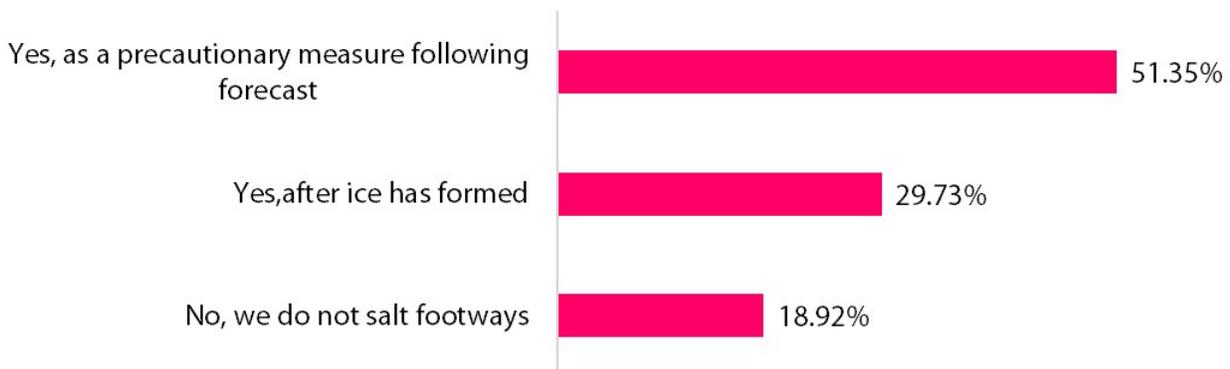
Section 4 – Salting

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



72.97% of respondents salt all primary routes and some other routes, and 24.32% salt only all primary routes. Other variations in approach are shown in the table above.

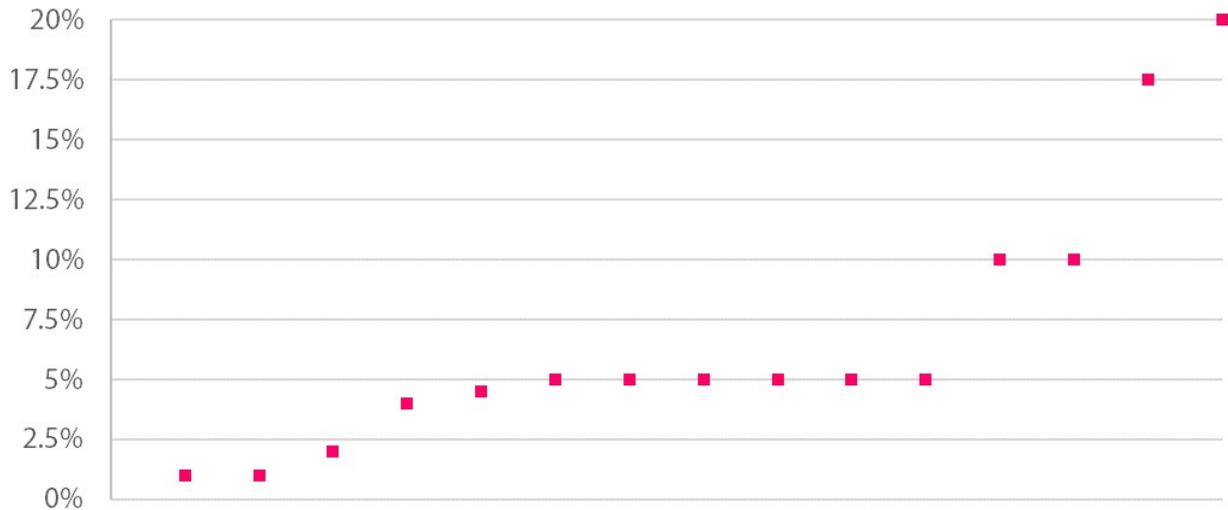
Do you salt footways?



51.

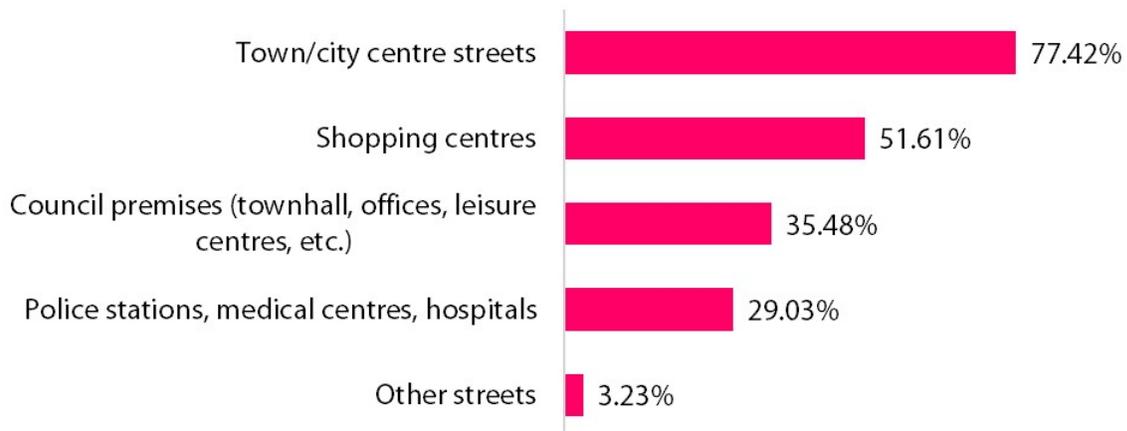
35% do this as a precautionary measure following forecast and 29.73% of respondents salt footways after ice has formed. 18.92% do not salt footways.

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



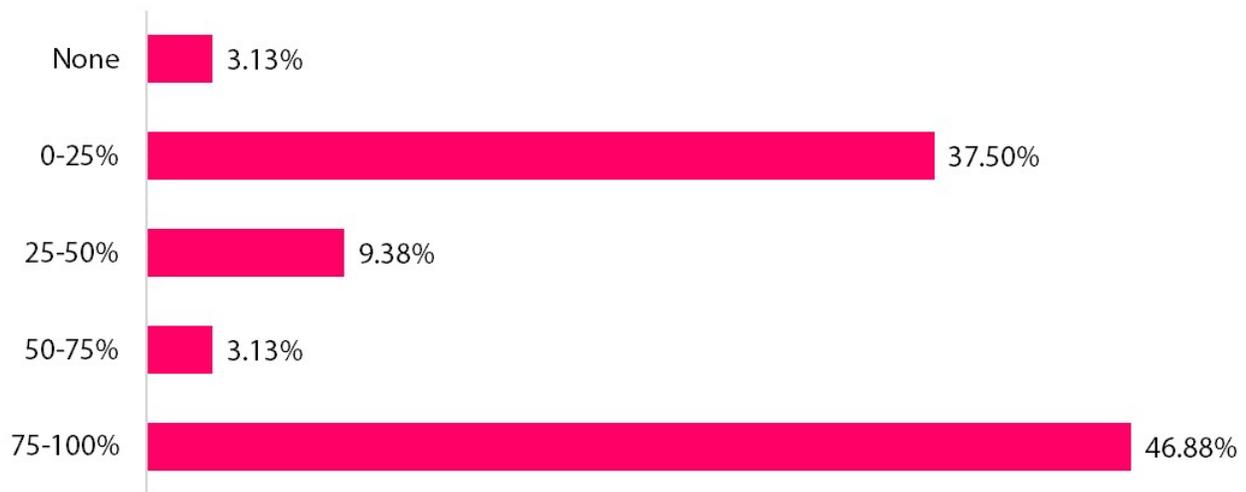
The percentage of footway network salted for most authorities was roughly 5% or under, although several salted around 10% of footways and one respondent reported that they salt 20% of their footways.

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



The majority of respondents salt the footways of town/city centre streets (77.42%) and shopping centres (51.61%). 35.48% salt council premises (town hall, offices, leisure centres, etc), 29.03% salt police stations, medical centres and hospitals and 3.23% salt other streets.

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



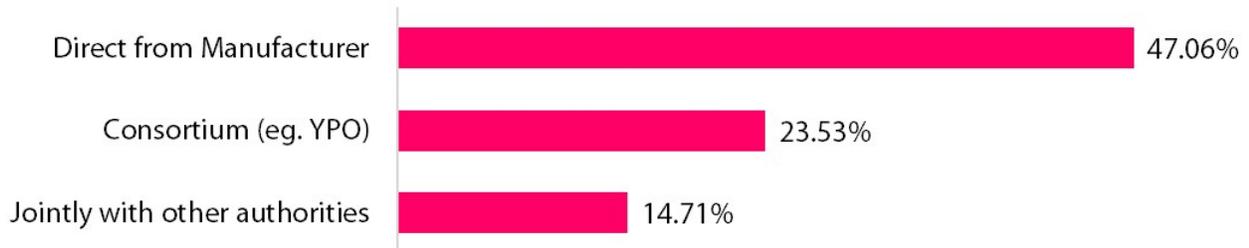
Most of the respondents managed to carry out between 75-100% of necessary footway salting (46.88%), with 3.13% carrying out 50-75%, 9.38% carrying out 25-50% and 37.50% carrying out 0-25%. 3.13% carried out none of the necessary footway salting.

Have the orders you placed for salt to cover winter maintenance over 2019-20 been met by your suppliers?



100.00% of survey respondents salt orders were met in full to cover winter maintenance over 2019-20.

How do you purchase salt supplies?



47.06% purchase salt directly from the manufacturer, 23.53% purchase salt through a consortium and 14.71% purchase salt jointly with other authorities.

Which company supplies your salt?

- Compass Minerals (21)
- Cleveland Potash (2)
- Irish Salt Sales (4)
- Cheshire Salt Union (1)

- ISMEC (1)
- ICL (1)
- South West Highways (1)

Most of the responding authorities were supplied by Compass, with other options including Cleveland Potash, Irish Salt Sales, Cheshire Salt Union, South West Highways, ISMEC and ICL.

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:

- Increase salt storage
- Strategic pile of salt
- Form salt cells for resilience
- Planned ordering
- Review of previous years salt usage
- Stock management improvements

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:

- Cycleways
- Targeted treatment routes
- Local weather sensors
- Supporting internal services
- Sharing stock with adjacent boroughs
- Footways treatment
- Bus routes
- Third party requests
- More digital technology
- Better use of technology

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:

- Adhoc work
- Reducing routes due to budget constraints
- Network treatment
- Reduced service

Local Authority Winter Maintenance 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
- Vehicle Maintenance and Transport
- Waste Management, Refuse Collection and Street Cleansing