apse membership resources

State of the Market Survey 2018

Transport

Briefing 18-45

December 2018

The state of the market survey was conducted by Rob Bailey, APSE Principal Advisor with assistance from 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

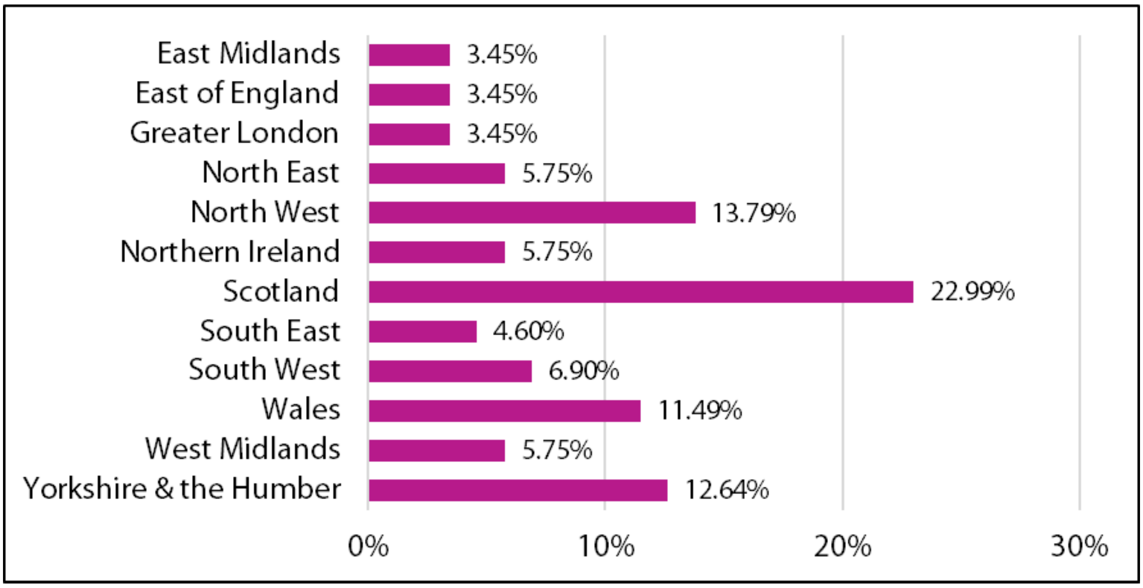
Transport

State of the Market 2018

APSE conducted an online survey between February and April 2018. A series of questions were asked covering a range of issues of interest to those officers and councillors responsible for Transport services.

Results of the survey

1. Where in the UK do you work?



There were 87 respondents to this survey; 52 from England, 20 from Scotland, 10 from Wales and 5 from Northern Ireland.

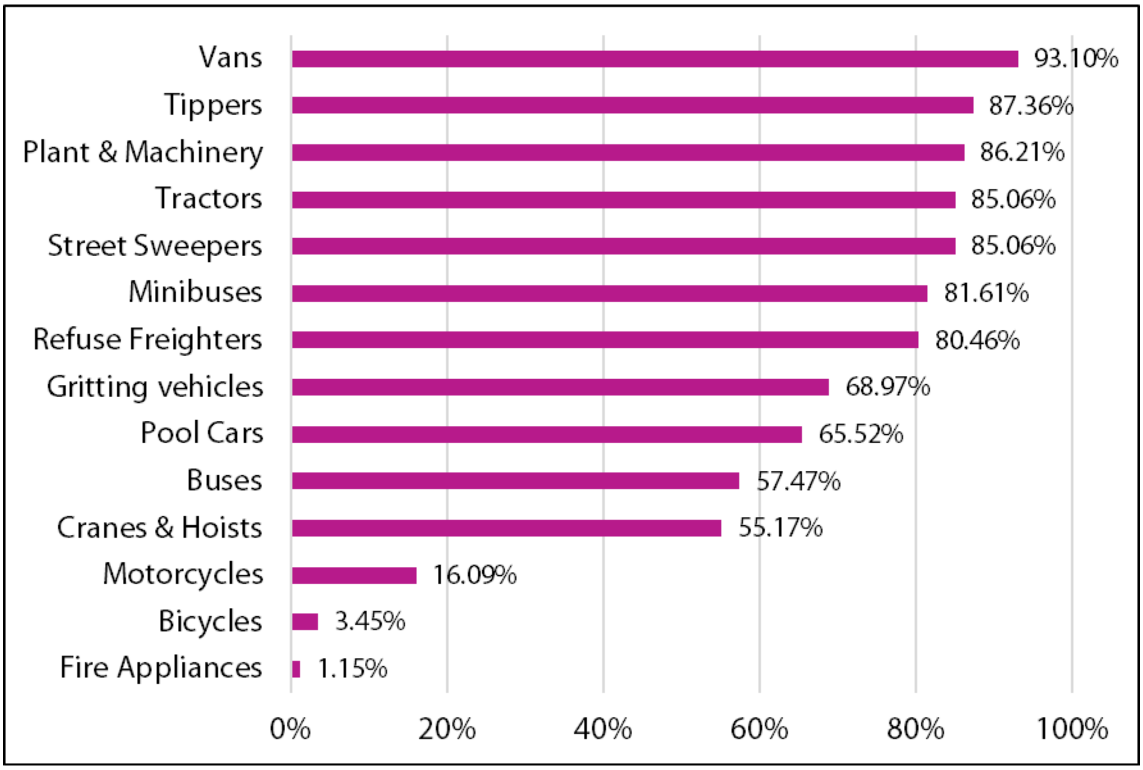
2. Which of the following services does your Transport section provide? (please tick all that apply)

Fleet Management	94.25%
In-House Vehicle Maintenance	85.06%
Vehicle Hire-In	85.06%
Fuel Supply	83.91%
Procurement	82.76%
Disposal of Assets	73.56%
Accident Management	71.26%
MOT Services	67.82%
Taxi Testing	64.37%
Driver Training	63.22%
Maintenance Workshop for handheld/pedestrian equipment	54.02%

Passenger Transport	49.43%
Transport Education and Support	37.93%
Collection and Delivery	32.18%
Authorised Testing Facility for VOSA testing	29.89%
Community Transport	28.74%
Recognised as a CPC approved training provider	22.99%
Commercial body shop facility	12.64%

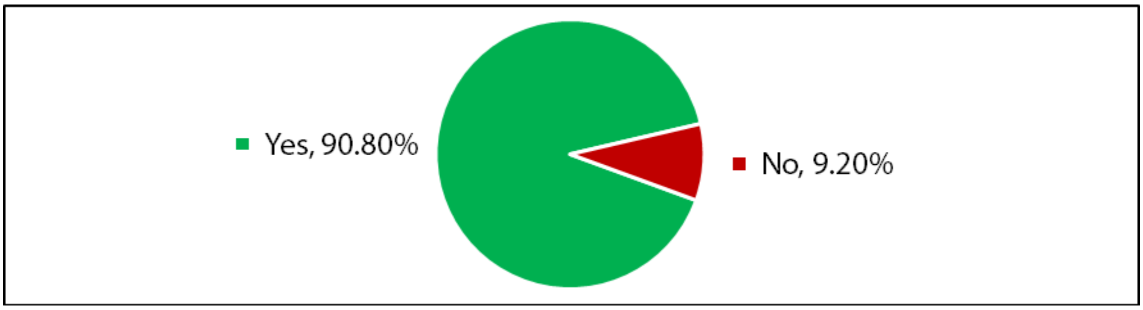
The most common services provided by respondents were fleet management (94.25%), in-house vehicle maintenance (85.06%), vehicle hire-in (85.06%), fuel supply (83.91%) and procurement (82.76%). Other responses not listed include parts supply, HAVs management & testing, courier service and tachograph calibration.

3. Which types of vehicle do you maintain?



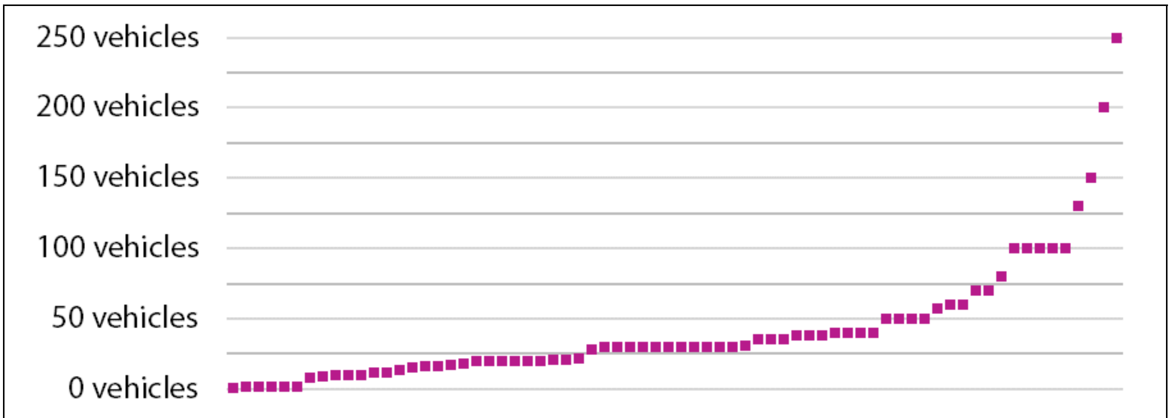
The most common types of vehicles maintained by respondents were vans (93.10%), tippers (87.36%), plant & machinery (86.21%), tractors (85.06%) and street sweepers (85.06%). Only 16.09% of respondents maintain motorcycles and 3.45% maintained bicycles.

4. Do you utilise Vehicle Tracking Systems?



The majority of respondents (90.80%) utilise Vehicle Tracking Systems.

5. How many vehicles are fitted with video recording systems?



Note: the highest answer (700) was excluded from the graph above to aid the clarity of comparisons

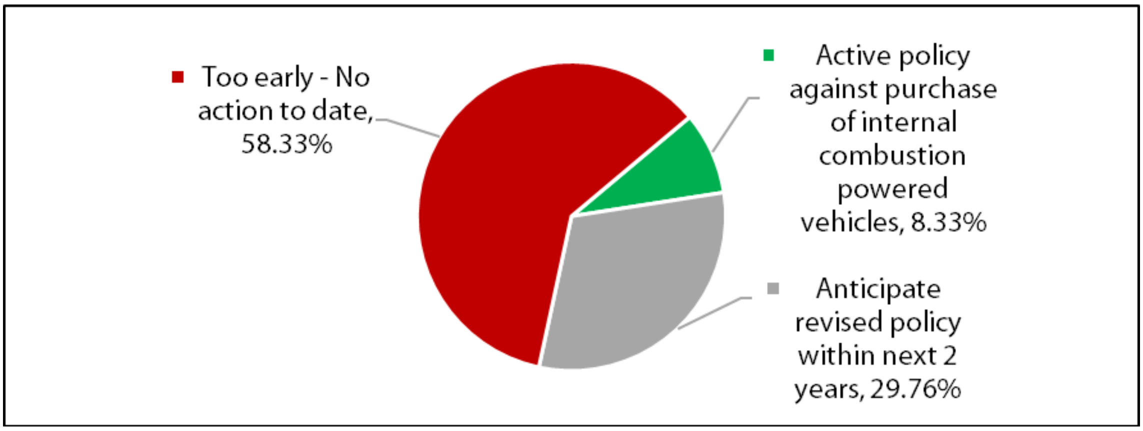
Respondents have reported having between 1 and 700 vehicles fitted with video recording systems; the average number was 51.

6. Do you own any electric or alternatively fuelled vehicles? (Please give the number of each)

	Number of authorities	Average number	Lowest number	Highest number
Electric	50	11.46	1	87
Hybrid	23	3.78	1	18
LPG	5	5.00	1	10
Hydrogen Cell	4	7.50	5	11

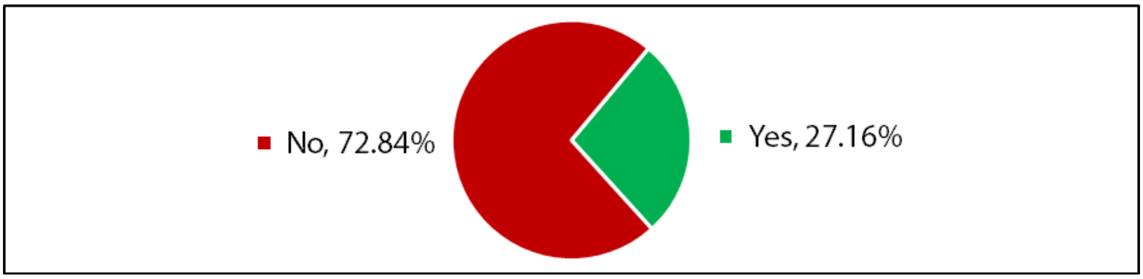
Among the responding authorities, 50 owned electric vehicles, 23 owned hybrid vehicles, 5 owned LPG vehicles and 4 owned hydrogen cell vehicles. The low, high and average amount owned can be seen in the table above.

7. 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?



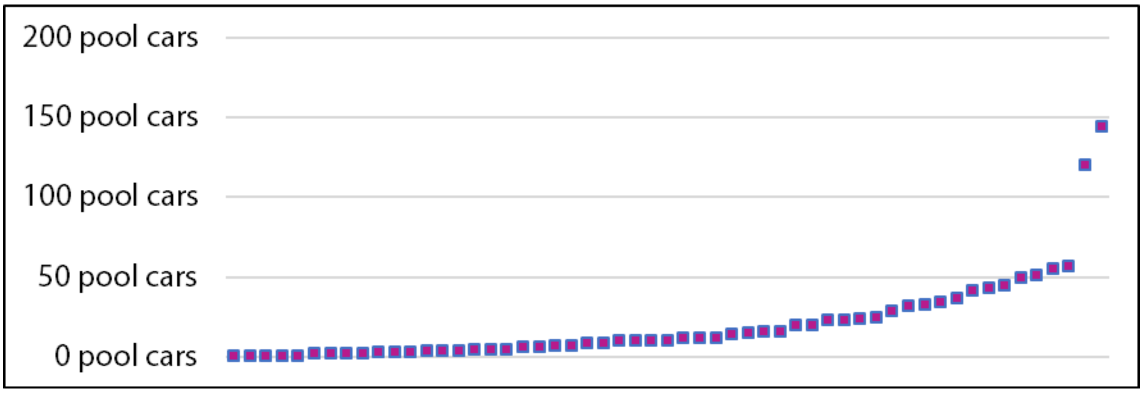
The majority of respondents said that no action has been taken to date (58.33%) on plans to end the sale of conventional petrol and diesel cars & vans. 8.33% have an active policy against the purchase of internal combustion powered vehicles, and 29.76% anticipate having a revised policy within the next 2 years.

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



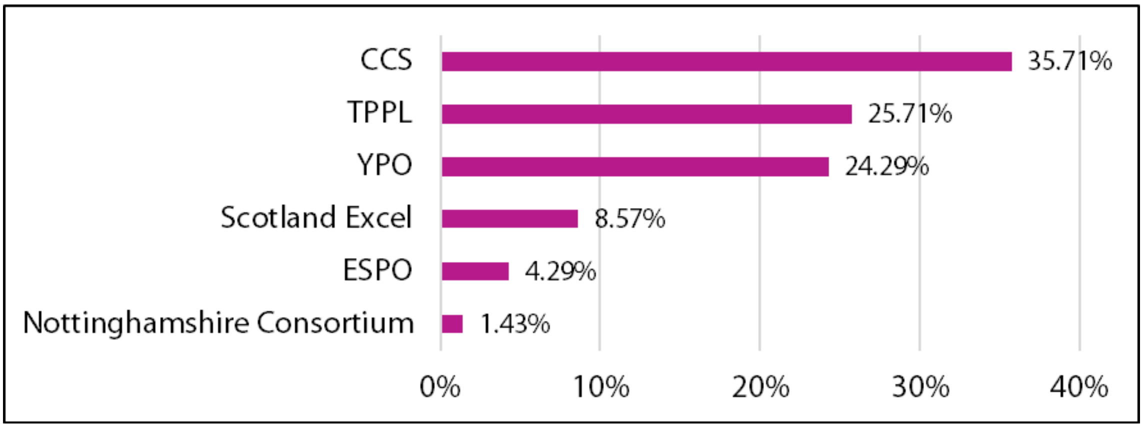
Most respondents indicated that the local authority they work for does not offer a salary sacrifice scheme for the purchase of vehicles for employees (72.84%).

9. How many pool cars do you operate for internal use?



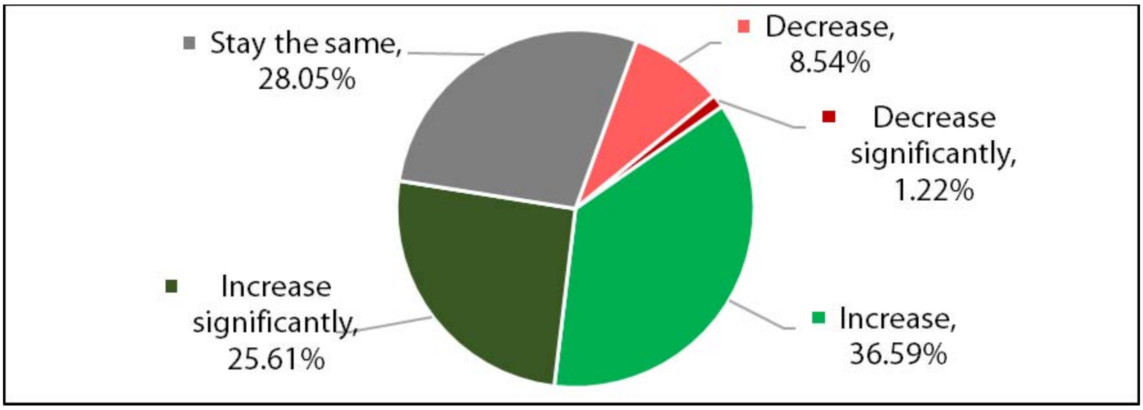
Responding local authorities have between 1 and 144 pool cars for internal use, with an average of 21 cars per council.

10. Do you use a Vehicle Procurement Framework? (please tick all that apply)



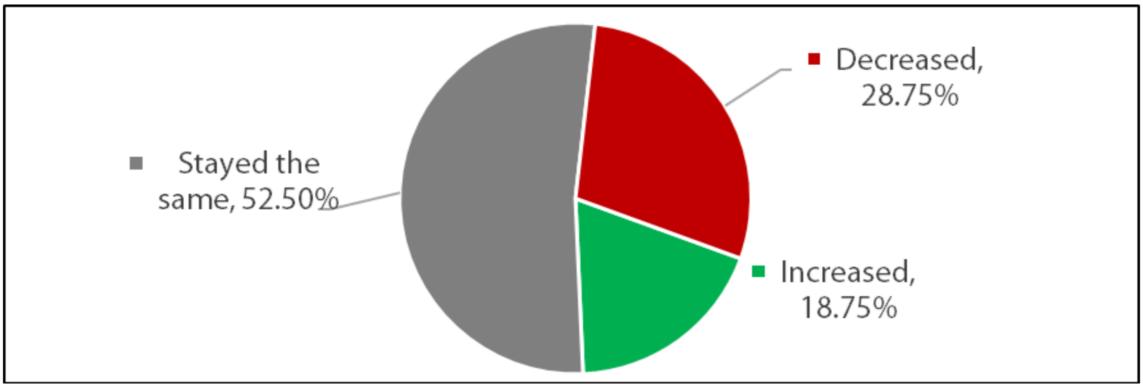
Vehicle Procurement Frameworks used by respondents include Crown Commercial Service (CCS – 35.71%), The Procurement Partnership (TPPL – 25.71%), Yorkshire Purchasing Organisation (YPO – 24.29%), Scotland Excel (8.57%), Eastern Shires Purchasing Organisation (ESPO – 4.29%) and Nottinghamshire Consortium (1.43%).

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



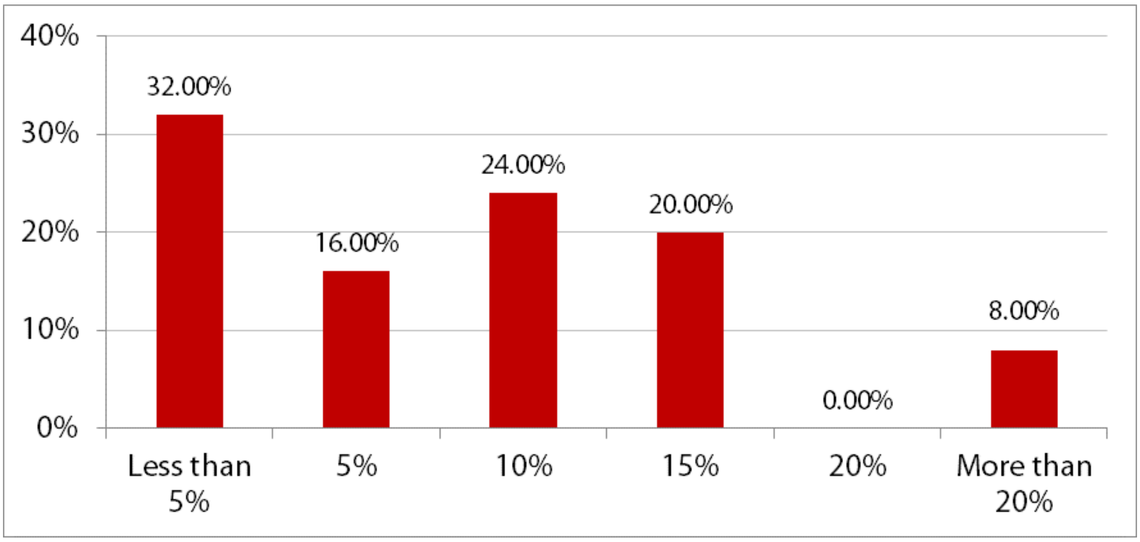
62.20% of respondents expect the workload of the transport section to either increase or increase significantly, 28.05% expect it to stay the same and only 9.76% expect it to either decrease or decrease significantly.

12. How has the budget for the Fleet service changed from 2016-17 to 2017-18?



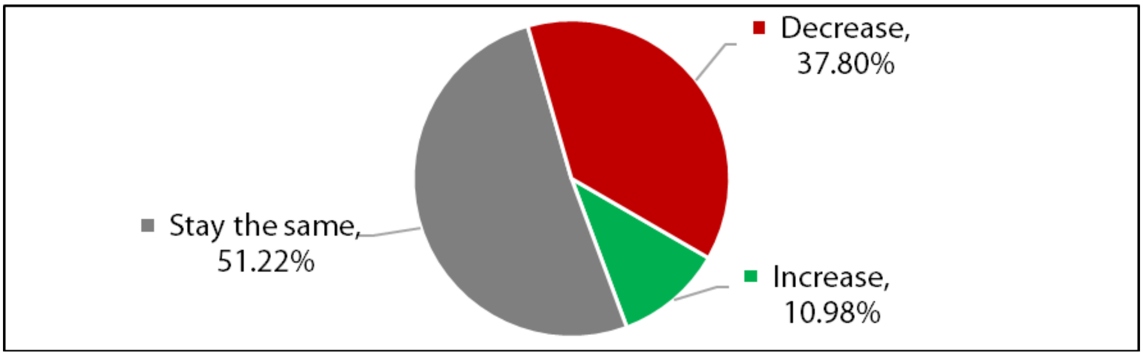
For the majority of respondents, the Fleet service budget has stayed the same (52.50%) as 2016-17. 28.75% have had their budget decreased and 18.75% have had their budget increased.

13. If your budget has decreased from 2016-17 to 2017-18, how much has it decreased by?



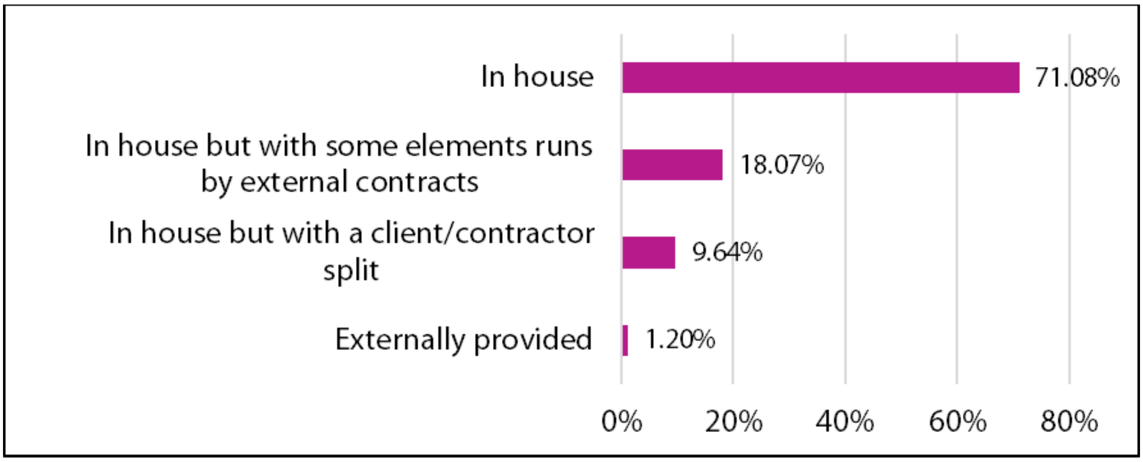
Most respondents have had their budgets decreased by less than 5% (32.00%) but there were also some that experienced a decrease of over 20% (8.00%).

14. How do you expect the budget for the Fleet service to change when allocated for 2018-19?



While roughly the same proportion of respondents expected their budget to stay the same (51.22%) as in question 12, the budget outlook for 2018-19 is less positive with 37.80% expecting a decrease. One comment said that there is a "continual service review to identify savings" and another said the budget decrease was for positive factors and was "due to the improved fleet in regards to its age and less maintenance in regards to the failure of parts".

15. How are your Fleet services currently delivered?

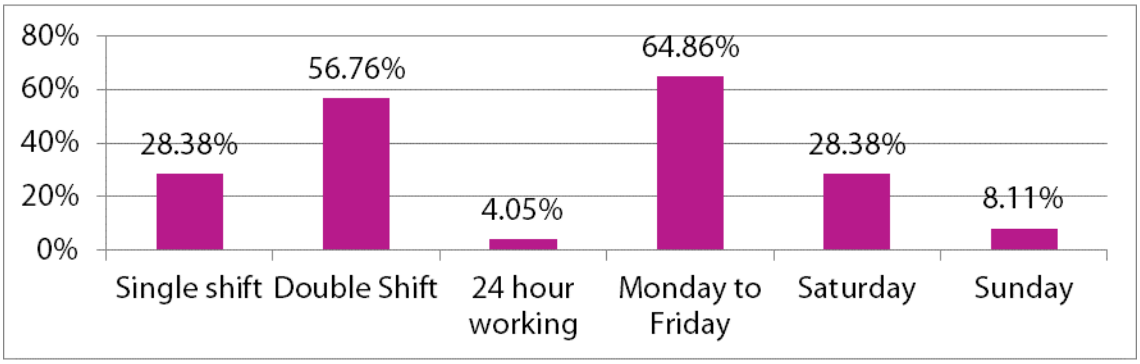


Most respondents delivered their services in-house (71.08%), with some elements run by external contracts (18.07%) and others with a client/contractor split (9.64%). Only one respondent's Fleet services were currently provided externally (1.20%).

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

Only one respondent whose service is currently provided in-house did not expect the service to remain in-house over the next 12 months; the service is considering changing to an arms length organisation.

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



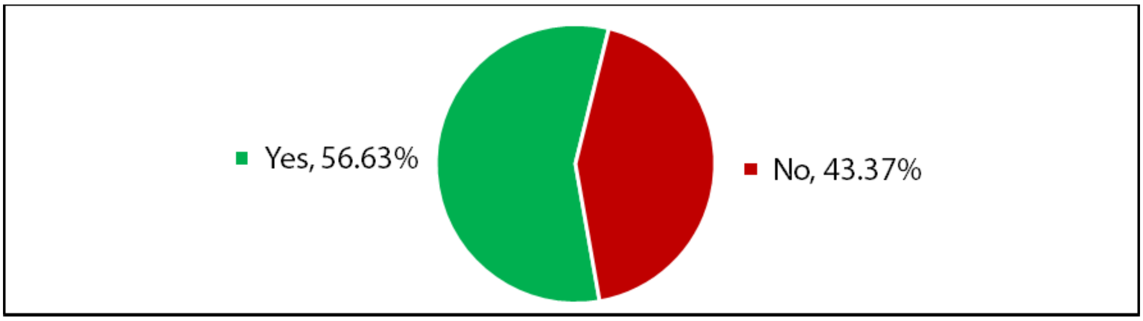
Respondents shift systems varied considerably from authority to authority, although most maintenance garages opened between 6:00am and 7:00am, and closed anywhere between 3:30pm and midnight.

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

	Operatives	Technical Staff	Managerial Staff
Trouble Recruiting	45%	71%	28%
Trouble Retaining	23%	16%	7%
No current recruitment	27%	17%	31%
No current problems	23%	12%	29%

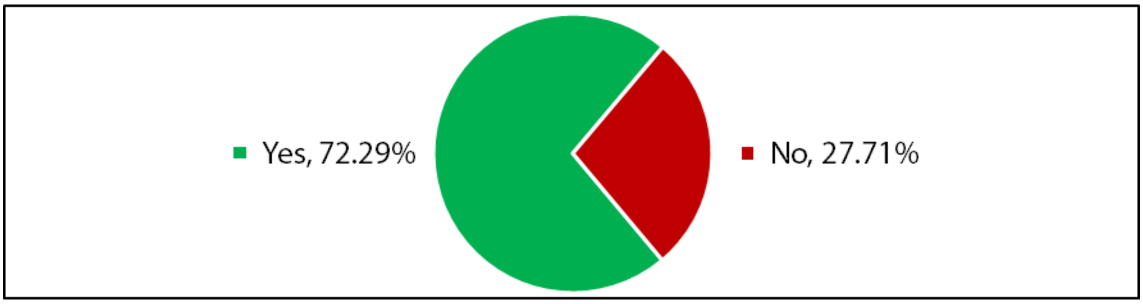
Recruitment of technical staff (71%) was the most common difficulty for local authorities over the past 12 months followed by recruitment (45%) and retention of operatives (23%). Some of the issues highlighted in comments were that "local government salaries are not competitive with the private sector" and others pointing to the "major skills shortage across the industry" as an issue.

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



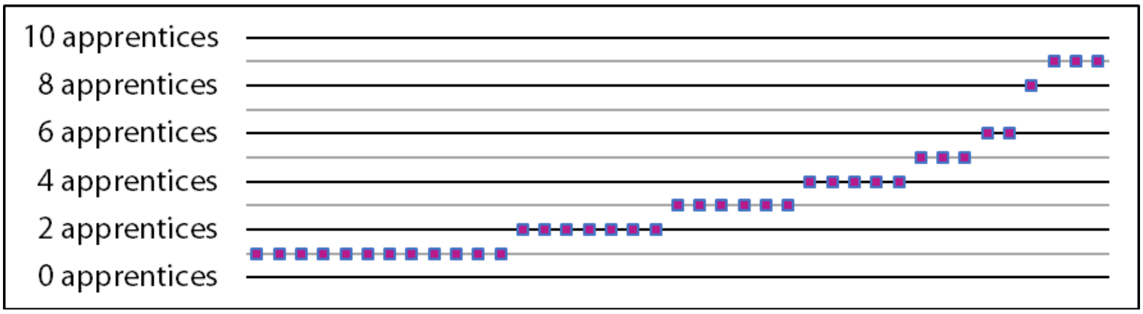
While the majority did personally feel that staff absence levels are at an acceptable level (56.63%), there were comments that highlighted some of the reasons for absences. Commenters suggested reasons such as having an ageing workforce, being too reliant on a small number for staff, and having a demanding workload. There were also several negative comments suggesting that sickness absence was in some cases abused by staff due to the public sector having paid sick leave, and staff being aware of how difficult they would be to replace.

20. Do you run an apprenticeship scheme?



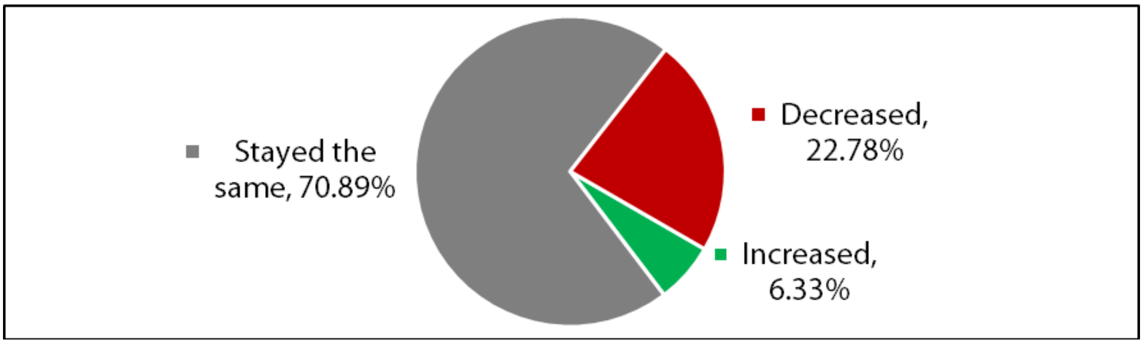
Most respondents (72.29%) do run an apprenticeship scheme.

21. If yes, how many apprentices are currently on the scheme?



Respondents reported having between 1 and 9 apprentices in the Fleet service, with the average per local authorities surveyed being 3 apprentices.

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



70.89% reported that their Fleet maintenance training budget has stayed the same over the past 12 months, with 22.78% saying it has decreased and only 6.33% saying it has increased. Several respondents reported no longer having a training budget for fleet staff or that the training budgets for the local authority have been centralised. For some local authorities only the absolute minimum training is being undertaken to remain operational. One respondent reported that training had to be taken as a capital purchase in their local authority.

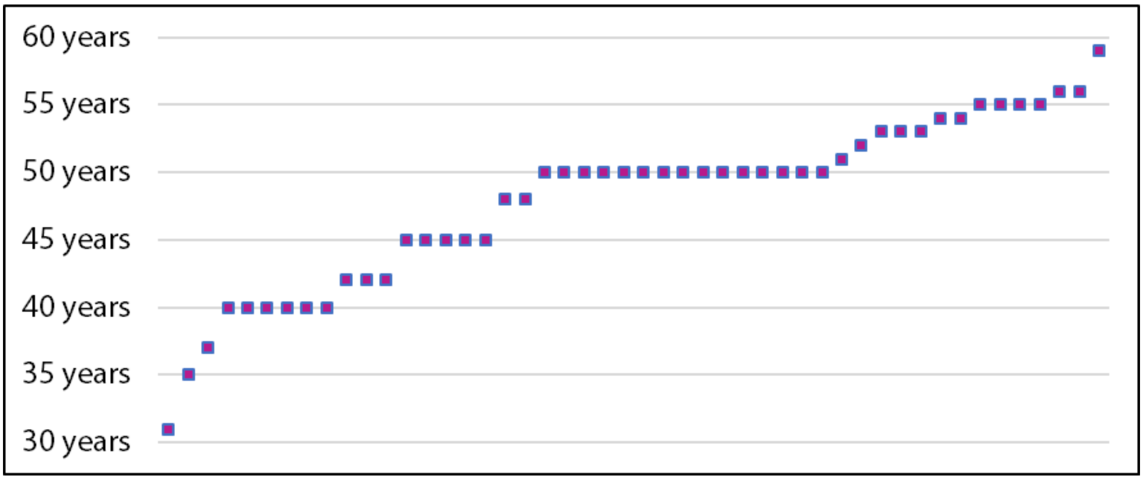
23. Approximately how many staff do you employ within fleet operations?

	Number of authorities	Average number	Lowest number	Highest number
Maintenance Fitters	72	14.24	2	47
Technical / Supervisory / Administrative	73	4.86	1	30
Managerial	74	2.21	1	6

SEN Transport Administration (excluding drivers)	21	4.62	1	15

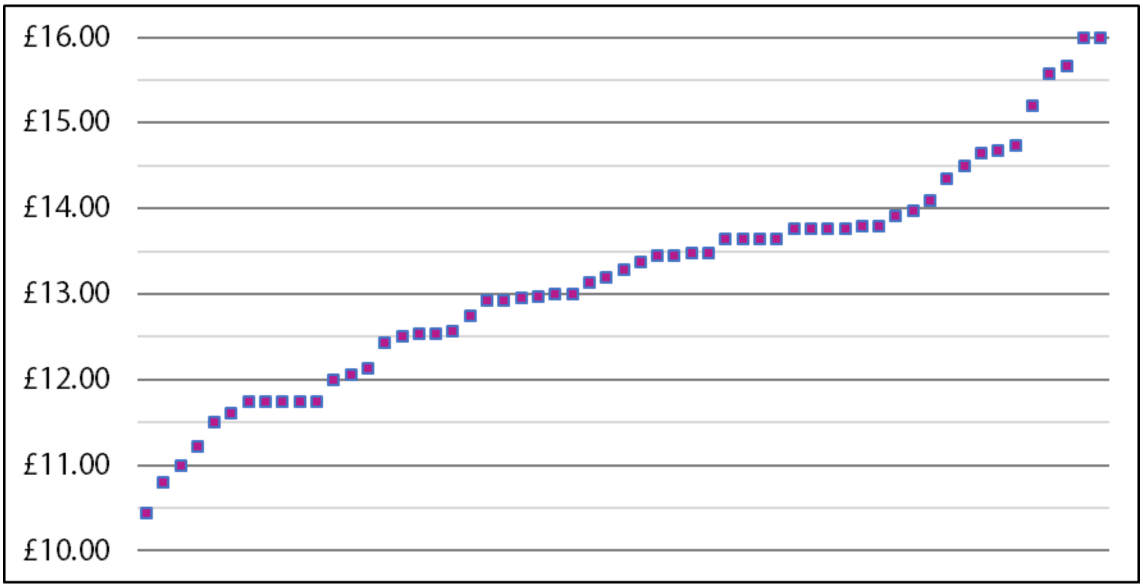
Across the responding authorities, the average number of maintenance fitters was 14.24, technical / supervisory / administrative was 4.86, managerial was 2.21 and SEN transport administration was 4.62. The highest and lowest number is shown in the table above.

24. What is the average age of your Fleet maintenance operational staff? (if known)



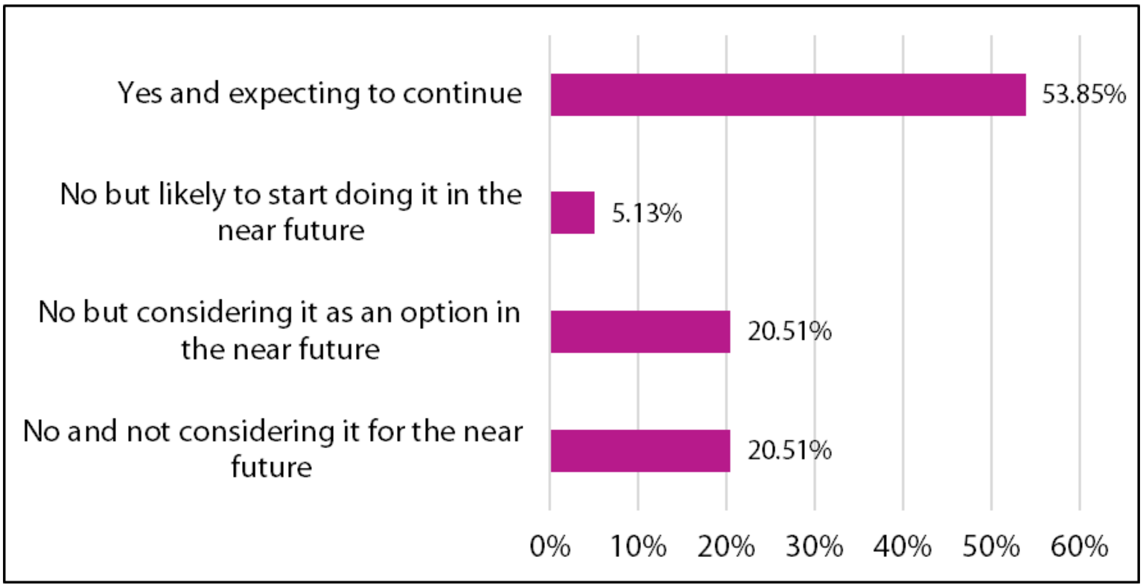
The average age for Fleet maintenance operational staff was 48 years, with the lowest reported figure being 31 years, and the highest being 59 years.

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



The basic hourly rate of pay for fitters from responding local authorities varied from £10.44 to £16.00, with an average pay of £13.19.

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



Most authorities do sell their services to organisations external to the council (53.85%) and 25.64% are either considering this as an option or are likely to start doing it in the near future. Services include things like MOT testing, driver training, work for the NHS and care homes.

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

Simple charging mechanisms (90.91%) were the most common method of selling services, with 9.09% operating a trading company.

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

Expected growth areas included:

- MOTs
- Taxi testing
- Brake testing
- Pre-winter checks of vehicles
- Maintenance of electric vehicles
- Community / school / SEN transport
- Driver training
- Collaborative working and shared working across borders
- External commercial operations

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

Many respondents noted that they did not anticipate any areas where work may decrease, but the areas where work may decrease included:

- Operational service delivery
- Social care / passenger / NHS transport
- Loss of external contracts

Local Authority Transport Services

State of the Market 2018

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 and all end with an informal lunch to facilitate networking with peers in other councils. 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
- Sports and Leisure Management
- Vehicle Maintenance and Transport
- Waste Management, Refuse Collection and Street Cleansing