

State of the Market Survey 2022

Local Authority Transport Services



December 2022
22-55

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

Results at a glance	
Vehicles	
% utilising Vehicle Tracking Systems	96.67%
% with an active policy against the purchase of internal combustion powered vehicles	41.38%
Workload	
% expecting the workload of the transport section to increase over the next 12 months	75.00%
Budget	
% whose Fleet service budget has decreased from the last financial year	21.43%
% whose Fleet maintenance training budget has decreased over the past 12 months	7.14%
Staffing	
% offering a salary sacrifice scheme for vehicles for employees	41.38%
% who personally feel staff absence levels are not at an acceptable level	28.57%
% who run an apprenticeship scheme	96.43%
Average age of operational workforce	45 years
Average basic hourly rate of fitters	£15.01
% who are having trouble recruiting operatives	76.00%
% who are having trouble recruiting technical staff	81.48%
% who are having trouble recruiting managerial staff	41.18%
The Service	
% adding additional electrical supply capacity to charge Electric Vehicles in 1 or 2 years	33.34%

Transport

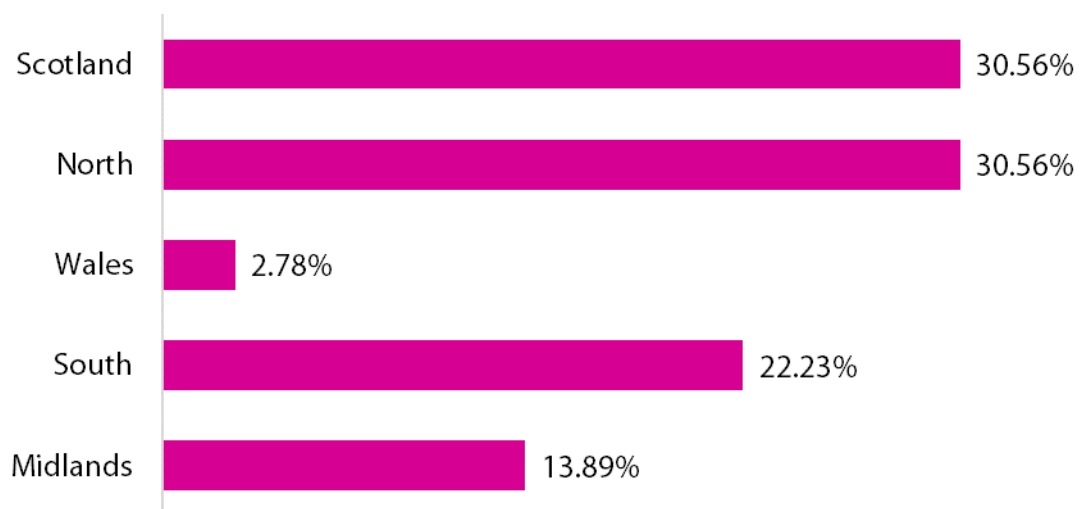
State of the Market 2022

APSE conducted an online survey during May and June 2022. 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.

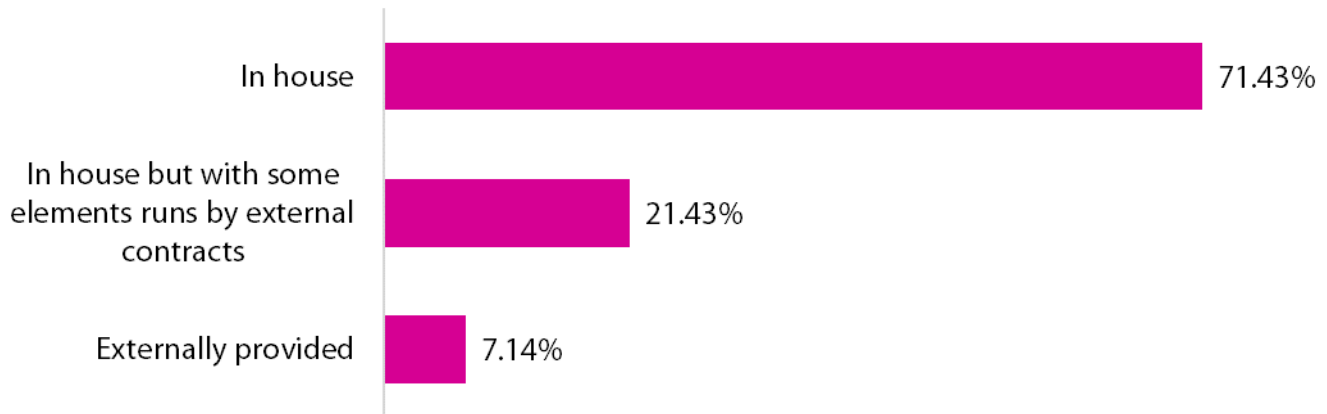
None of the questions were mandatory, so the total amount of responses differs from question to question. Individual details of respondents have been kept confidential. Results of the survey should be treated as a snapshot of current opinions of those working in transport services rather than a thorough analysis of change over time.

Where in the UK do you work?



Section 1 - The Service

How are your Fleet services currently delivered?



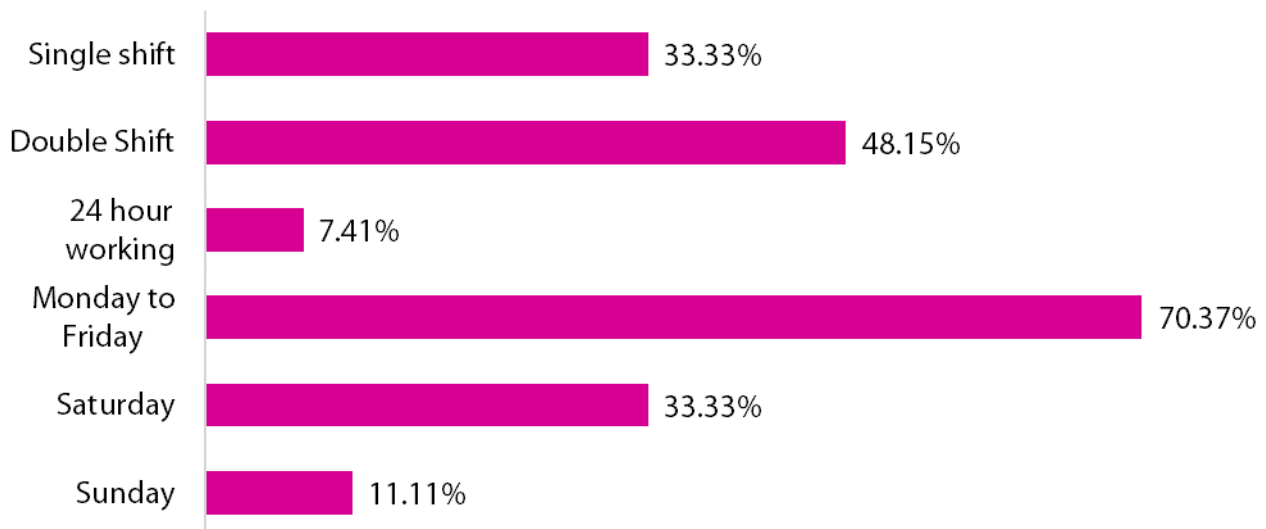
71.43% of Fleet services are delivered in-house, 21.43% are delivered in house but with some elements run by external contracts and 7.14% are externally provided.

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



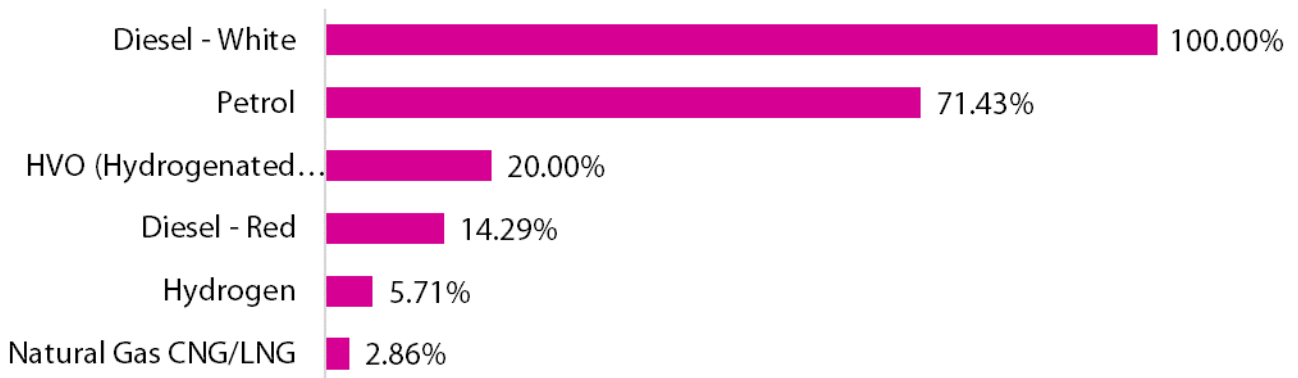
100.00% of those who currently provided in-house services expect them to remain in-house over the next 12 months.

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



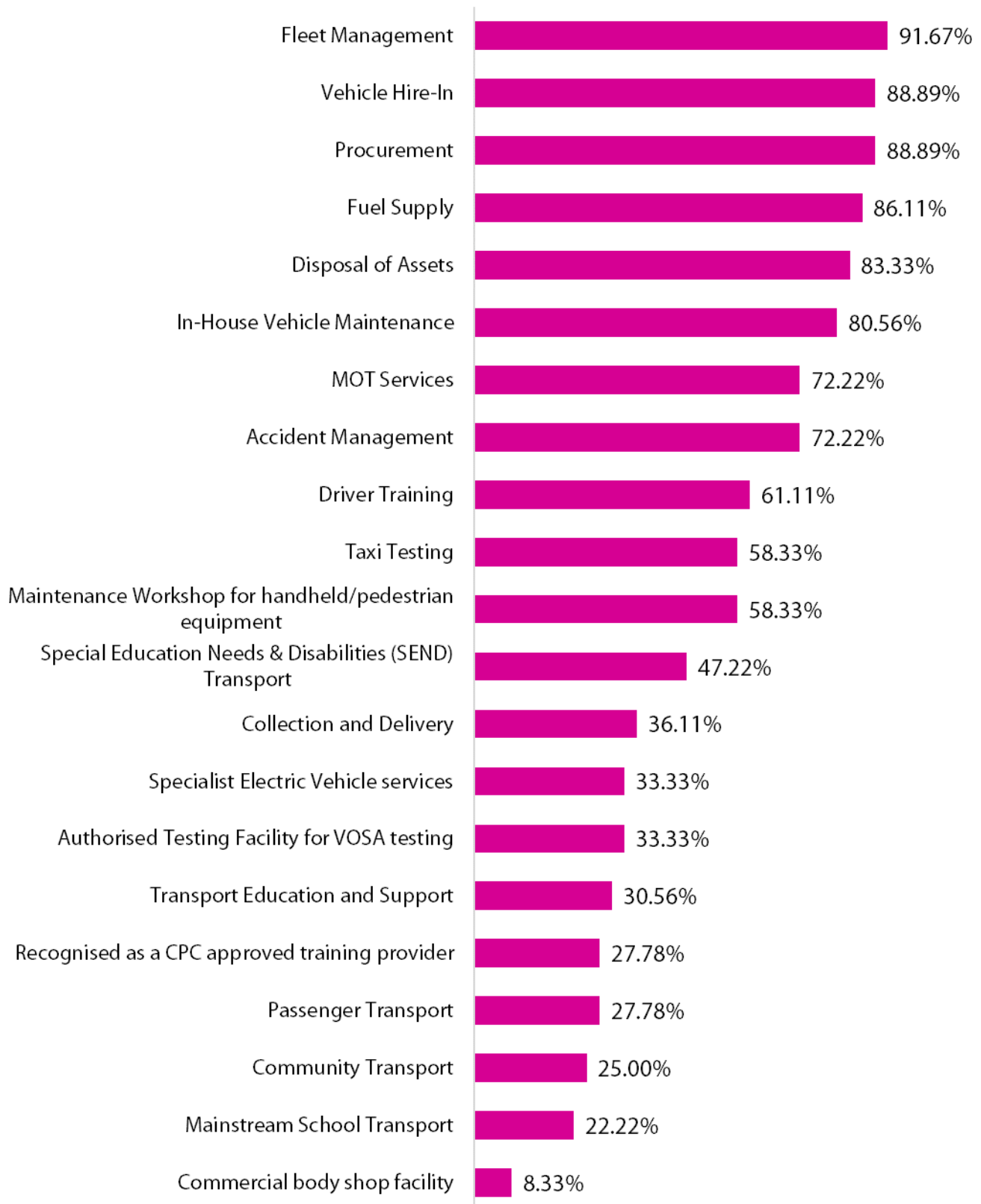
Most respondents operate a Monday to Friday shift system for the maintenance garage (70.37%) with 33.33% open on a Saturday and 11.11% open on a Sunday. 33.33% use single shifts, 48.15% use double shifts and 7.41% have 24 hour working.

**Which of the following fuels do you currently use for fleet and plant?
(Please tick all that apply)**



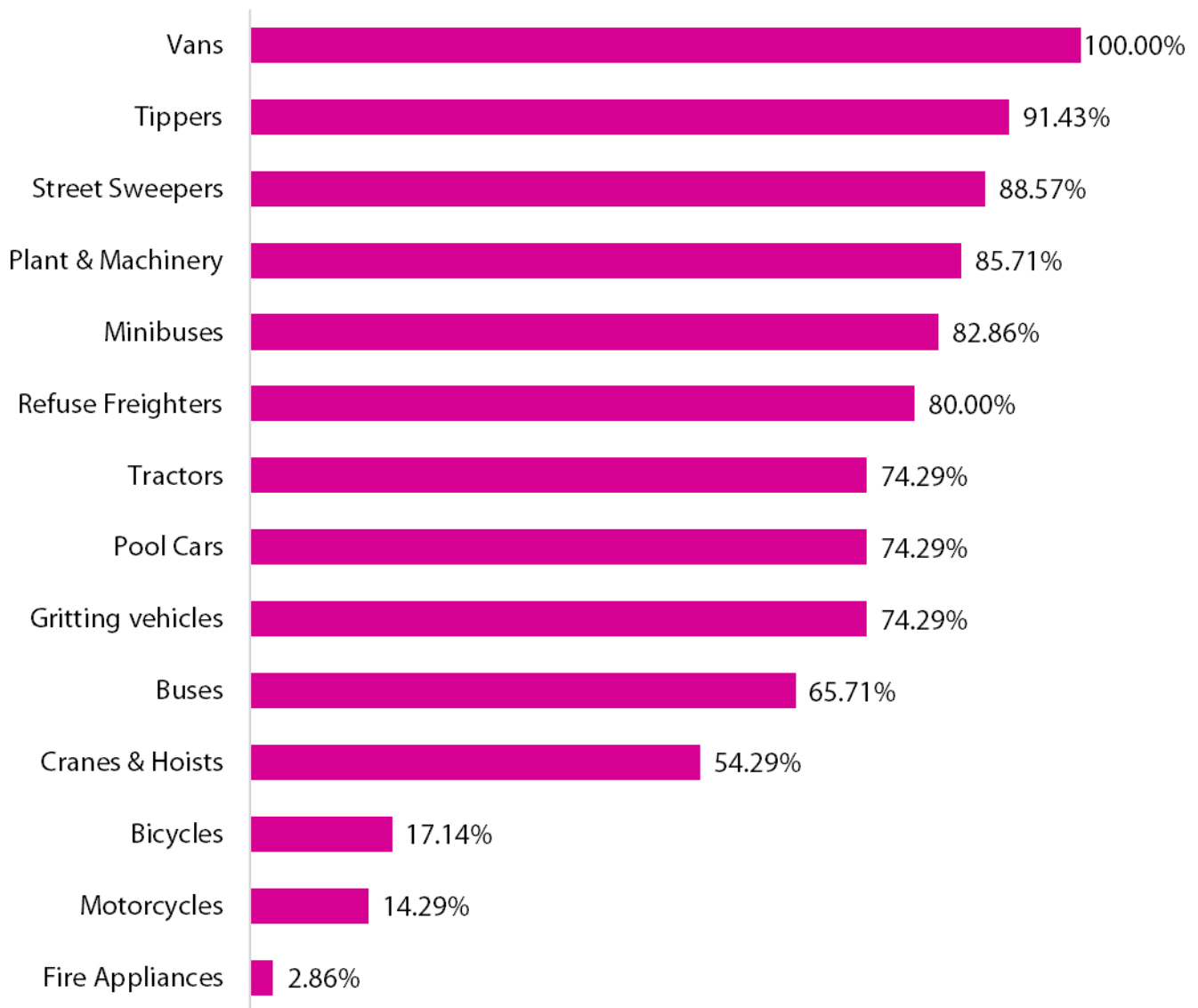
All respondents reported using white diesel with 71.43% using petrol. Other fuels used included HVO (20.00%), red diesel (14.29%), hydrogen (5.71%) and natural gas CNG/LNG (2.86%).

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 vehicle do you maintain?



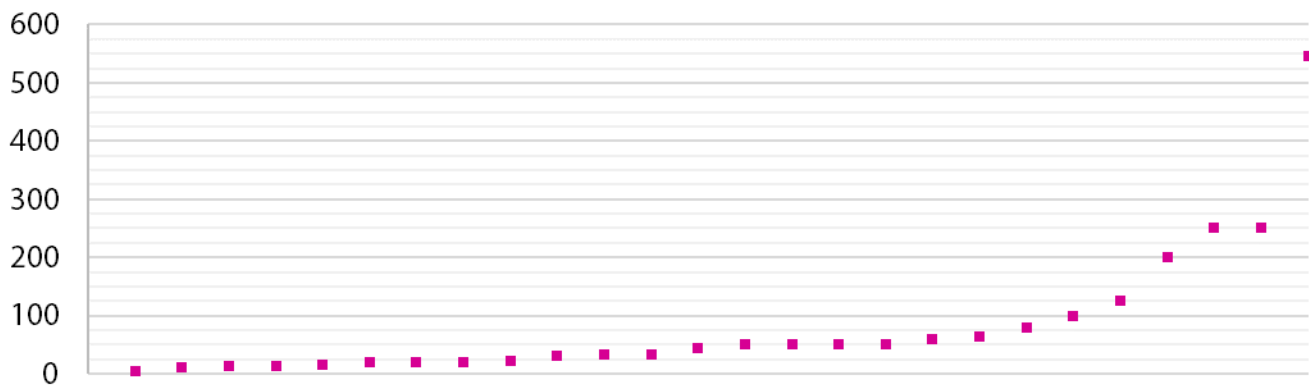
The table above shows the range of vehicle types maintained by responding councils. Other vehicle types mentioned by respondents included specialist units such as horseboxes.

Do you utilise Vehicle Tracking Systems?



96.67% of respondents do utilise Vehicle Tracking Systems.

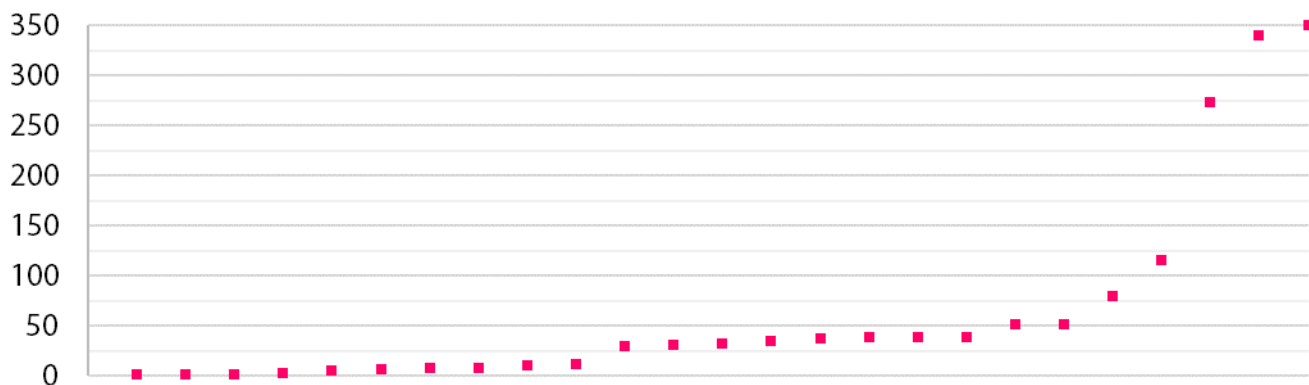
How many vehicles are fitted with video recording systems?



Respondents reported having anywhere from 5 vehicles up to 546 vehicles, with a median of 83.

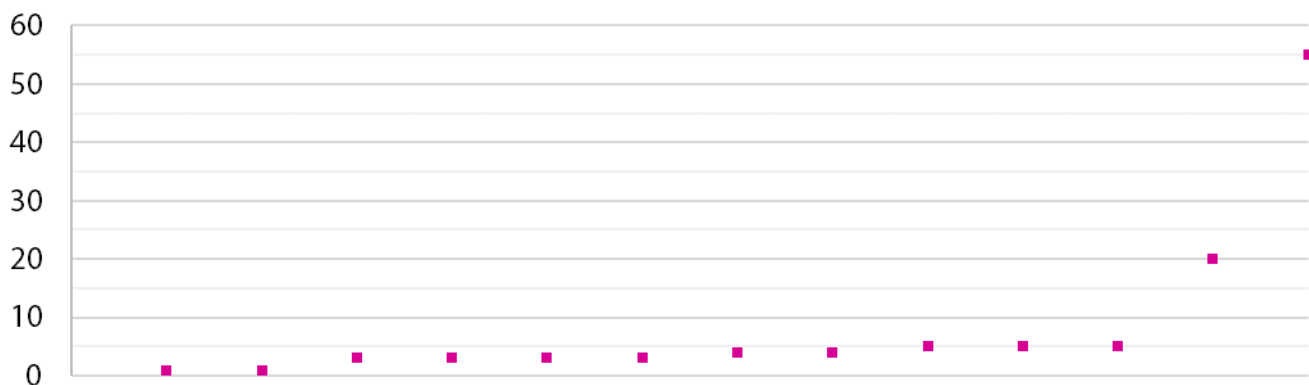
Do you own any electric or alternatively fuelled vehicles?

Electric vehicles



The number of electric vehicles owned by each respondent to the survey is shown in the graph above, with respondents owning between 2 and 350.

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 55.

LPG

No survey respondents had LPG vehicles.

Hydrogen cell

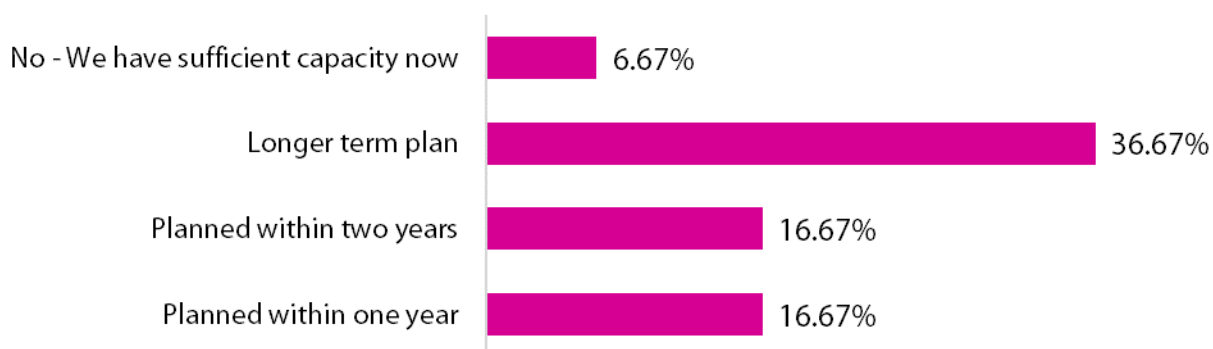
1 survey respondent had 4 hydrogen cell vehicles.

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?



41.38% anticipate that they will have a revised policy within the next 2 years, 13.79% of respondents have not taken any action to date on the plans to end the sale of conventional petrol and diesel cars and 41.38% have an active policy against the purchase of internal combustion powered vehicles.

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



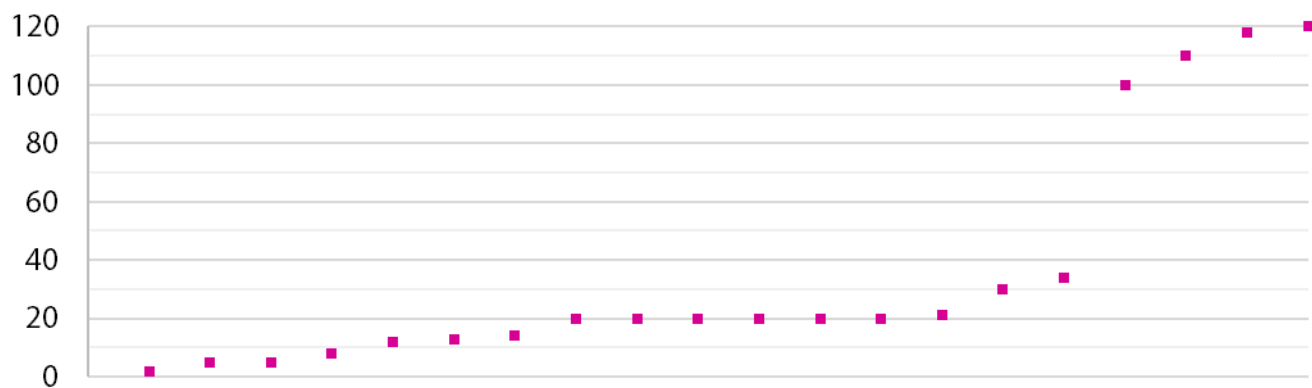
16.67% of respondents are planning to add additional electrical supply capacity to charge electric vehicles within one year, and 16.67% within two years. 36.67% have a longer term plan for this and 6.67% have sufficient capacity now.

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



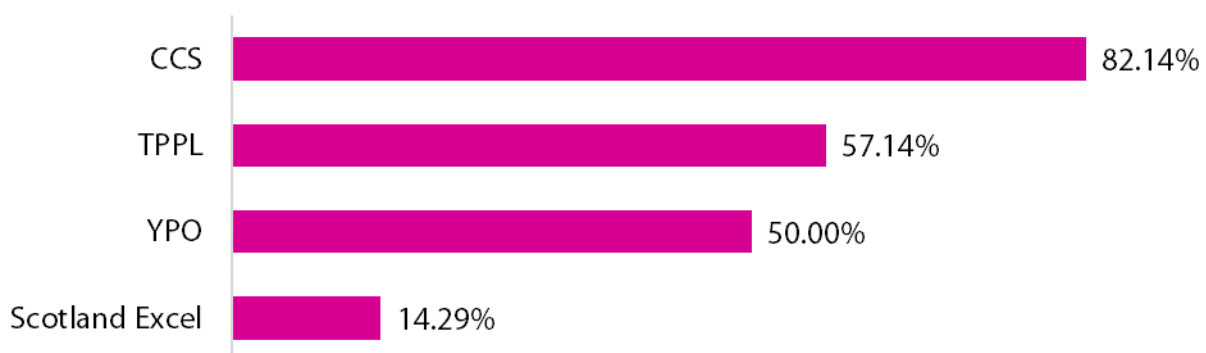
The majority of respondents do not offer a salary sacrifice scheme for vehicles for employees (58.62%), although a significant proportion of responding councils do offer a scheme (41.38%).

How many pool cars do you operate for internal use?



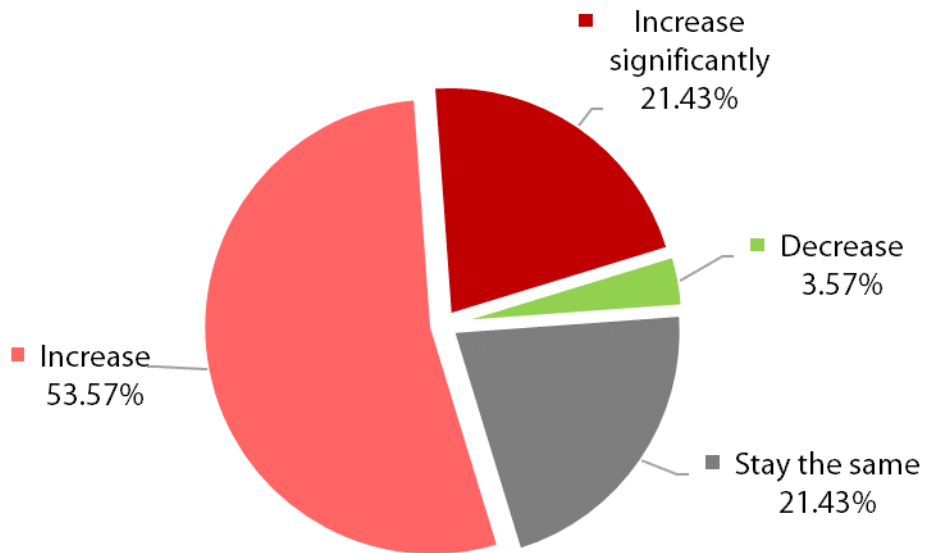
Respondents owned between 2 and 120 pool cars.

Do you use a Vehicle Procurement Framework?



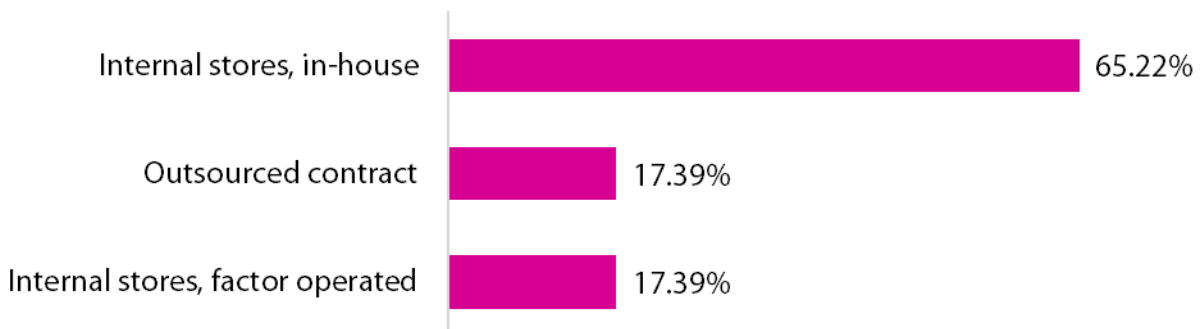
The most popular Vehicle Procurement Framework used by respondents was CCS (82.14%) followed by TPPL (57.14%) and YPO (50.00%). Respondents also reported using Scotland Excel (14.29%).

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



75.00% of respondents expect the workload of the transport section to increase and 3.57% expect this to decrease. 21.43% expect it to stay the same.

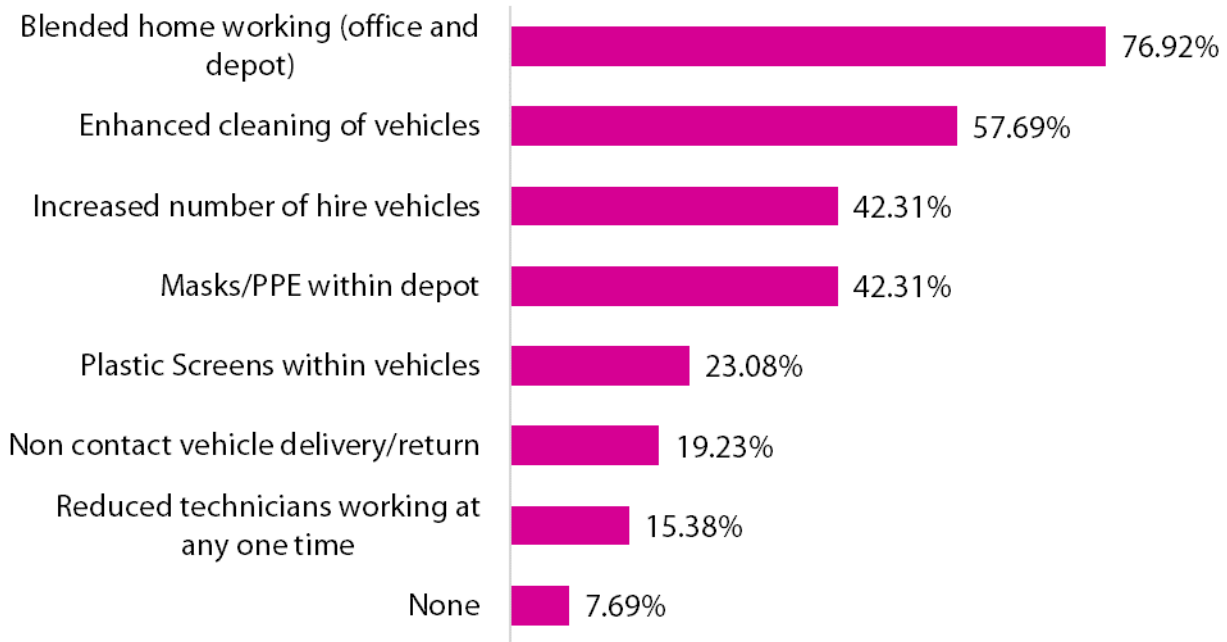
How do you operate your spares system?



65.22% of respondents use internal in-house stores, 17.39% are factor operated and 17.39% have an outsourced contract.

What changes (if any) have been retained that were originally implemented as a response to Covid-19? (please tick all that

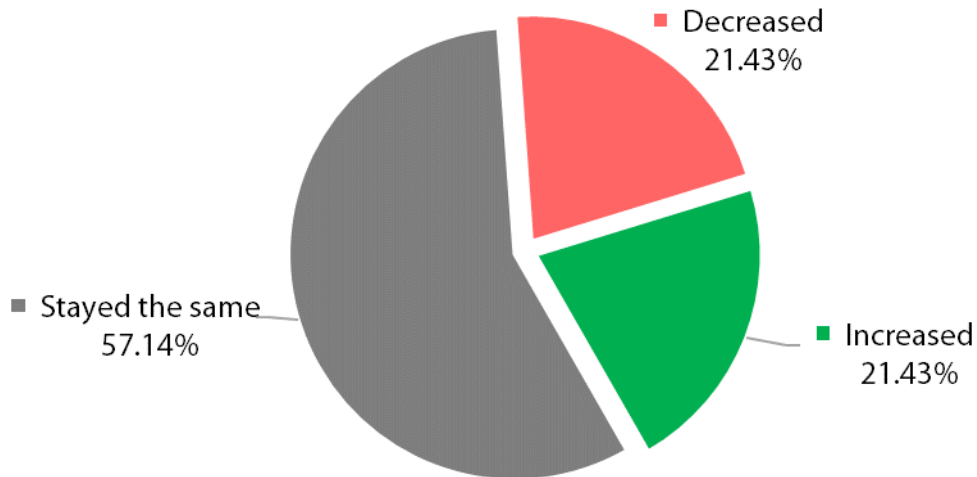
apply)



The majority of respondents have retained blended home working (76.92%) and enhanced cleaning of vehicles (57.69%) that were originally implemented as a response to COVID-19.

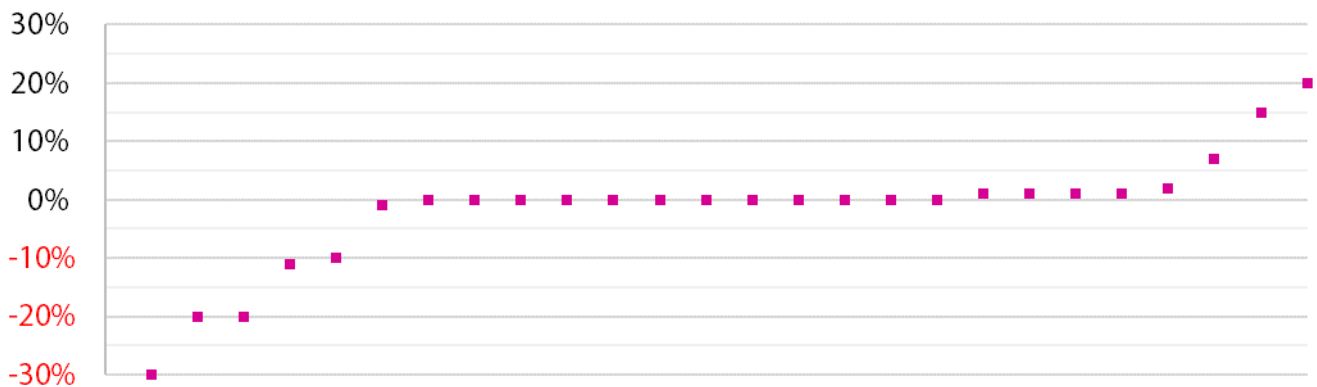
Section 2 - Budget

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



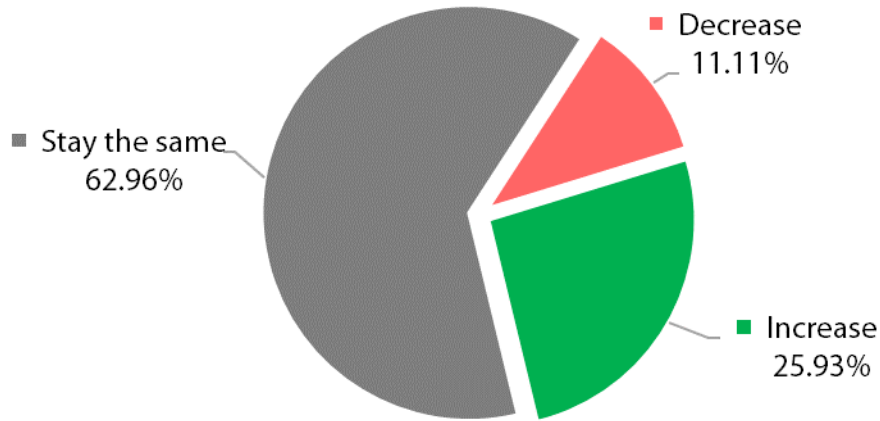
For the majority of respondents, the budget has stayed the same as the last financial year (57.14%). 21.43% reported that their budgets had decreased, and 21.43% said that it had increased.

How much has your budget changed over the last year?



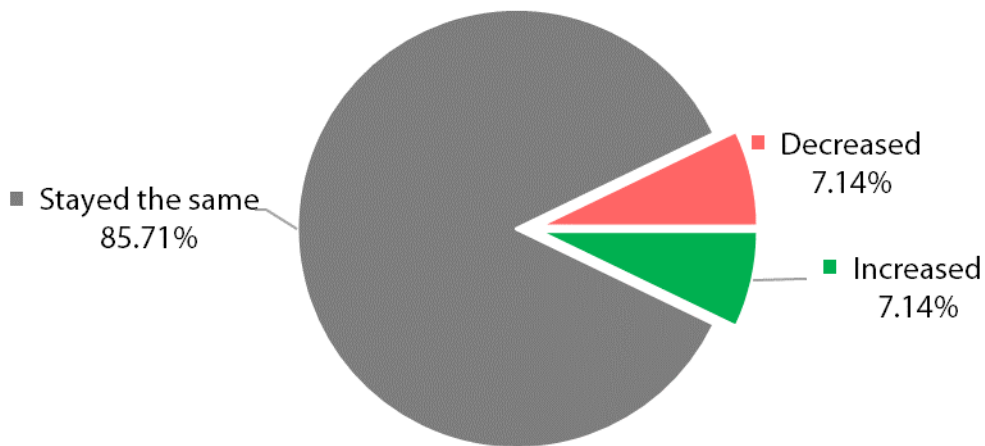
Responses varied from being reduced by 30% to increased by 20%.

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



62.96% expect the budget for the next financial year to stay the same, 25.93% expect it to increase and 11.11% expect it to decrease.

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

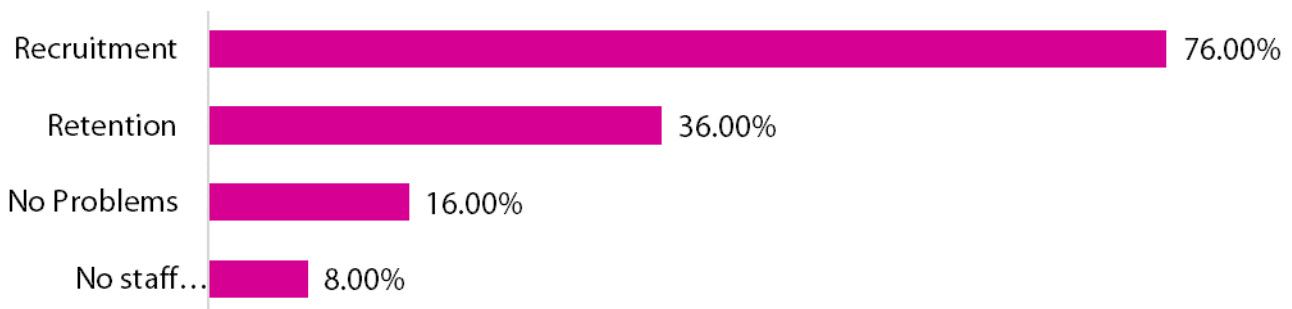


Over the past 12 months, most of the respondents' fleet maintenance training budget had stayed the same 85.71%, with 7.14% experiencing a decrease and 7.14% experiencing an increase.

Section 3 - Staffing

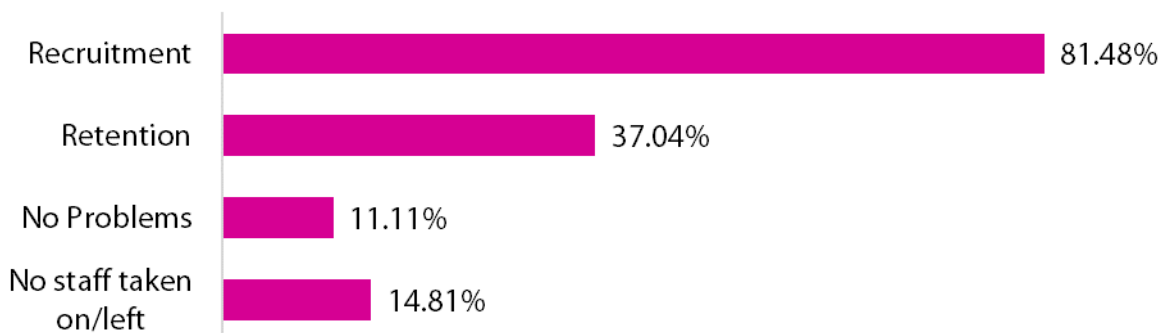
Are you having trouble recruiting or retaining staff? (over the past 12 months)

Operatives



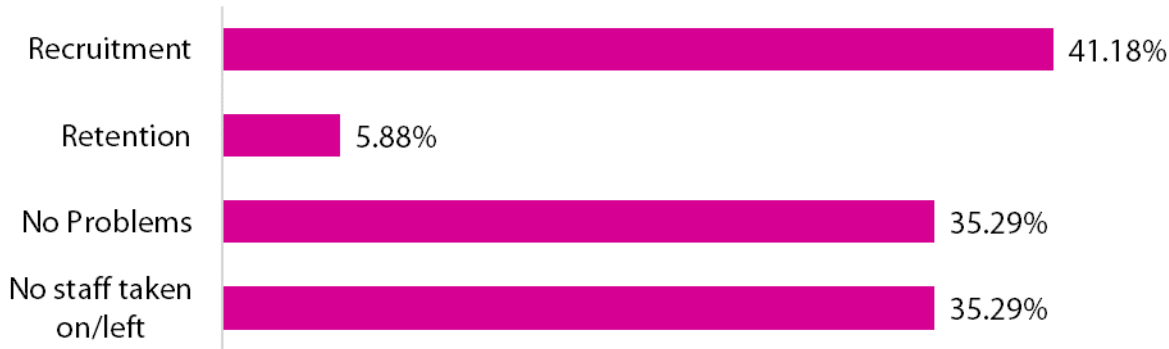
76.00% had trouble recruiting and 36.00% reported having trouble retaining operatives.

Technical Staff



In terms of technical staff, most reported having trouble recruiting (81.48%) and some had issues retaining staff (37.04%).

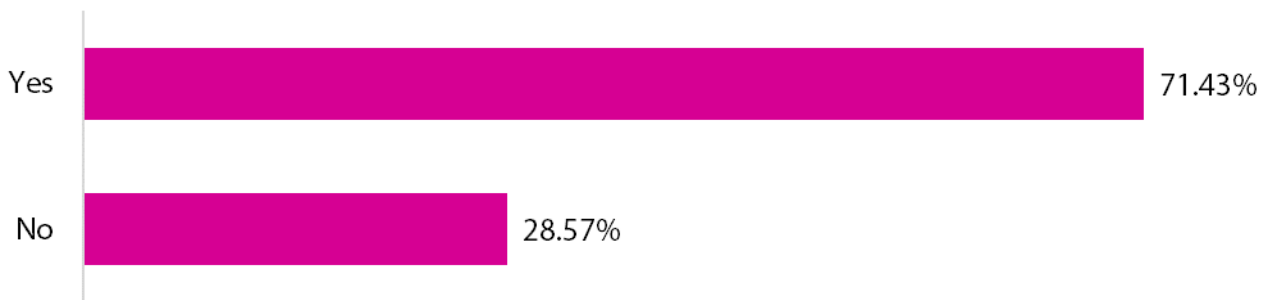
Managerial Staff



41.18% had trouble recruiting managerial staff and very few had any problems retaining staff (5.88%).

The plain fact is that technically qualified staff are scarce and therefore at a premium. Local authorities are competing with private sector fleet operators for the same staff. Covid and furlough appears to have reduced the incentive to move so retention has improved, however this might be short lived if the economy accelerates.

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 (71.43%), a large portion of respondents disagreed with this statement (28.57%).

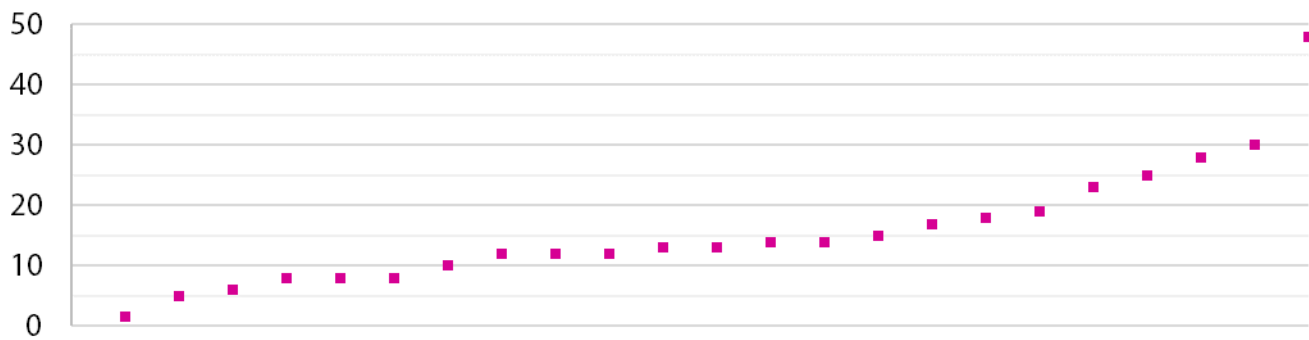
Do you run an apprenticeship scheme?



96.43% of respondents do run an apprenticeship scheme.

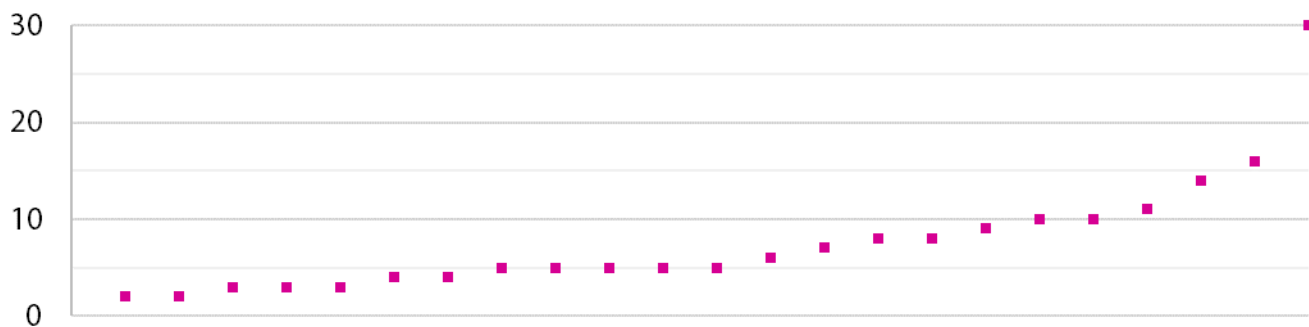
Approximately how many staff do you employ within fleet operations?

Maintenance Fitters



Across responding authorities, the number of maintenance fitters varied considerably from 1.5 up to 48.

Technical / Supervisory / Administrative support



The number of technical / supervisory / administrative staff ranged from 2 up to 30 members of staff.

Managerial



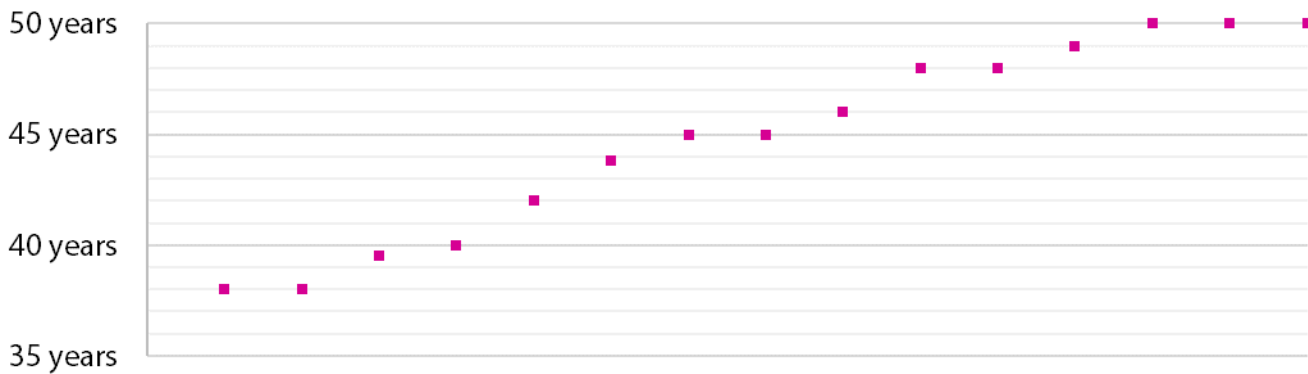
The variance in numbers of managerial staff was from 1 to 7 members of staff.

SEN Transport Administration (excluding drivers and escorts)



The number of SEN Transport Administration staff per authority ranged from 1 to 8.

What is the average age of your Fleet maintenance operational staff?



The average age of Fleet maintenance operational staff varied from authority to authority, with a low of 38 years to a high of 50 years. Across all respondents, the average age was 45 years.

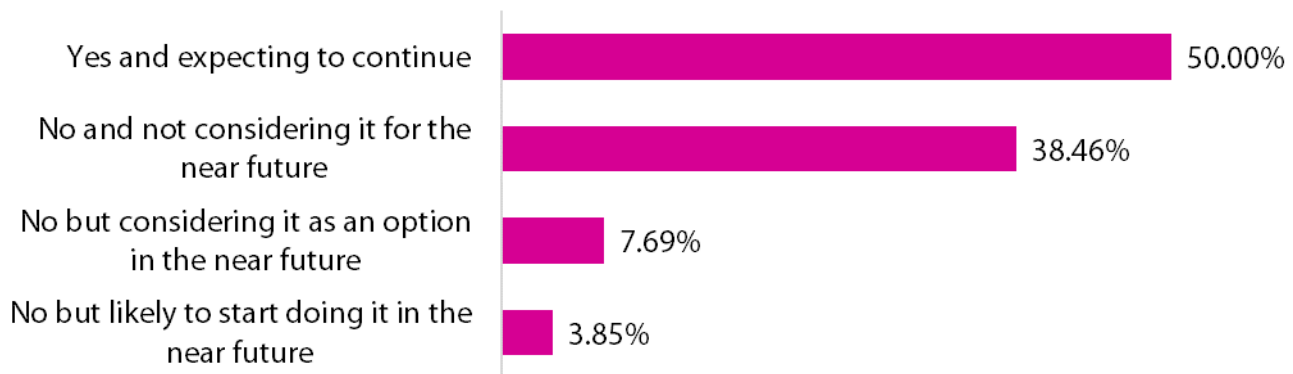
What is the basic hourly rate of pay for your fitters?



The basic hourly rate of pay for fitters ranged from £11.27 to £17.65, with an average of £15.01.

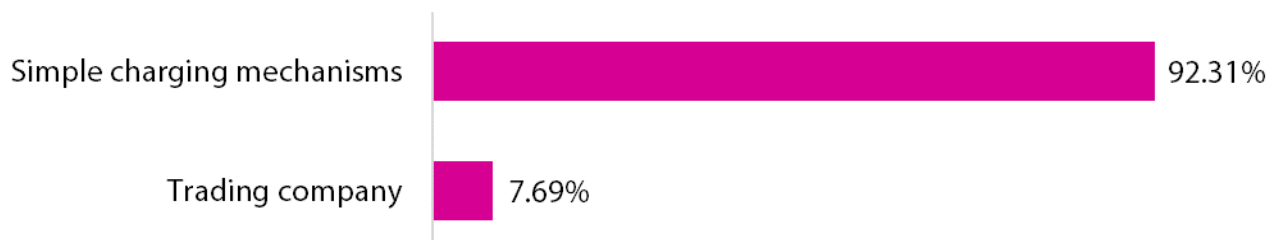
Section 4 – Areas of growth and decline

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%). 3.85% are likely to start this in the near future, 7.69% are considering it as an option in the near future. The remaining 38.46% 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 (92.31%).

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

Growth areas identified by responding councils include:

- Refurbishment
- Electric vehicle training
- Fuel economy training
- External work for other public authorities
- Alternative fuels
- Commercial workshop contracts
- Food waste collection
- Private work through MOTs
- Bringing more work in-house
- Electric fleet repairs
- Older vehicle maintenance
- Taxi testing
- Decarbonisation of vehicle fleet
- School and SEN transport

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

Most respondents do not see areas where work may decrease over the next 12 months, but responses included:

- Vehicle maintenance due to lack of trained staff
- Vehicle maintenance due to the growth of electric vehicles
- Sub-contracting due to a lack of private contractors
- Street cleansing and grounds maintenance

Local Authority Transport Services

State of the Market 2022

APSE Comment

Local authority fleets are changing with many now containing electric vehicles, often in large numbers and others experimenting with hydrogen alternatives. Skill shortages beset the industry with the workforce now averaging 45 years old and substantial difficulty in recruiting and retaining vehicle technicians. The problem applies to the private sector too, potentially creating opportunities to use council facilities to maintain and service commercial fleets as well where capacity permits.

New vehicle shortages remain post covid meaning that some older vehicles are being retained at increased maintenance cost to bridge the replacement lag. Fleet makes up a substantial element of the local authority carbon footprint so investment is likely to remain high for the foreseeable future.

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
- Recovery and Renewal
- Renewables and Climate Change
- Sports and Leisure Management

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