

State of the Market Survey 2022

Local Authority Winter Maintenance Services



State of the Market Survey 2022

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

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?	
• Has your authority declared a climate emergency?	
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	96.08%
% currently selling services to organisations external to the council	33.34%
% with a snow warden scheme (or similar) in place	27.27%
Budget	
% of respondents whose budget has stayed the same from 2021-22 to 2022-23	74.07%
% of respondents who had to overspend on their 2021-22 winter maintenance budget	44.90%
% of respondents who underspent on their 2021-22 winter maintenance budget	42.86%
% whose dedicated training budget had stayed the same	33.33%
Salting	
% whose salt orders were met in full by suppliers over 2021-22	86.96%
% reviewing gritting / salt routes after the severe weather over the recent years	70.59%
% purchasing salt supplies jointly with other authorities	13.04%
Footways	
% salting footways as a precautionary measure following forecast	37.74%
% not salting footways	22.64%
% who had salted 75-100% of necessary footway salting	48.78%
% who had not salted any of the necessary footway salting	4.88%

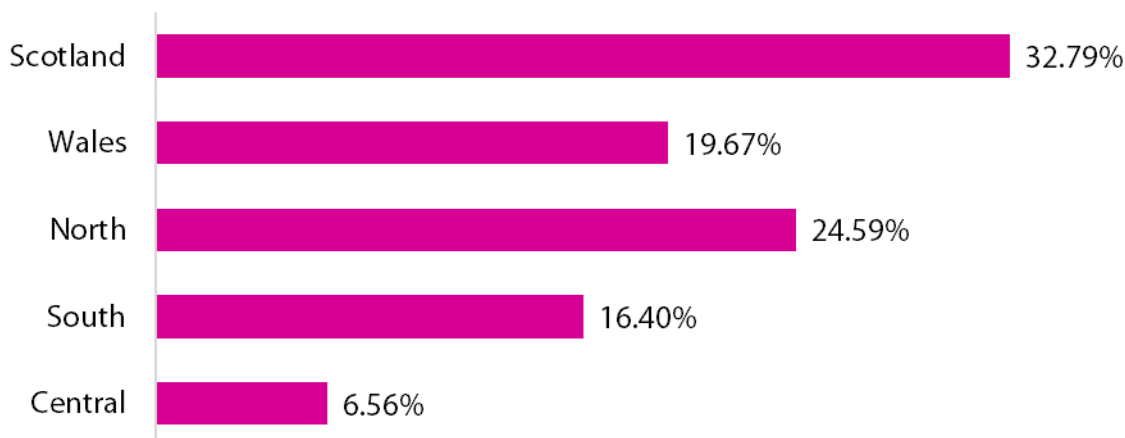
Introduction

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 Winter Maintenance 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 winter maintenance services rather than a thorough analysis of change over time.

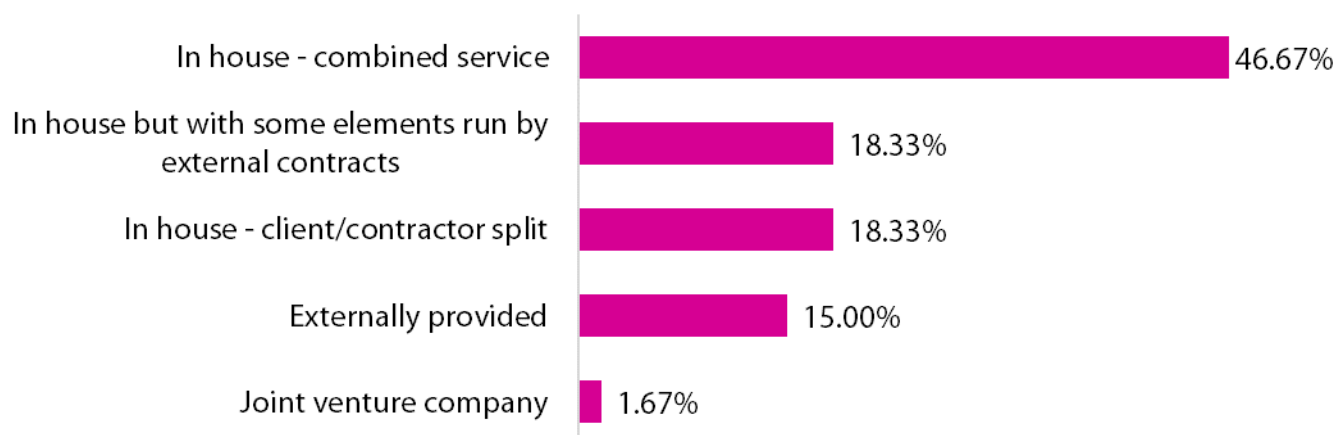
Where in the UK do you work?



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

Section 1 – The Service

How are your winter maintenance services currently delivered?



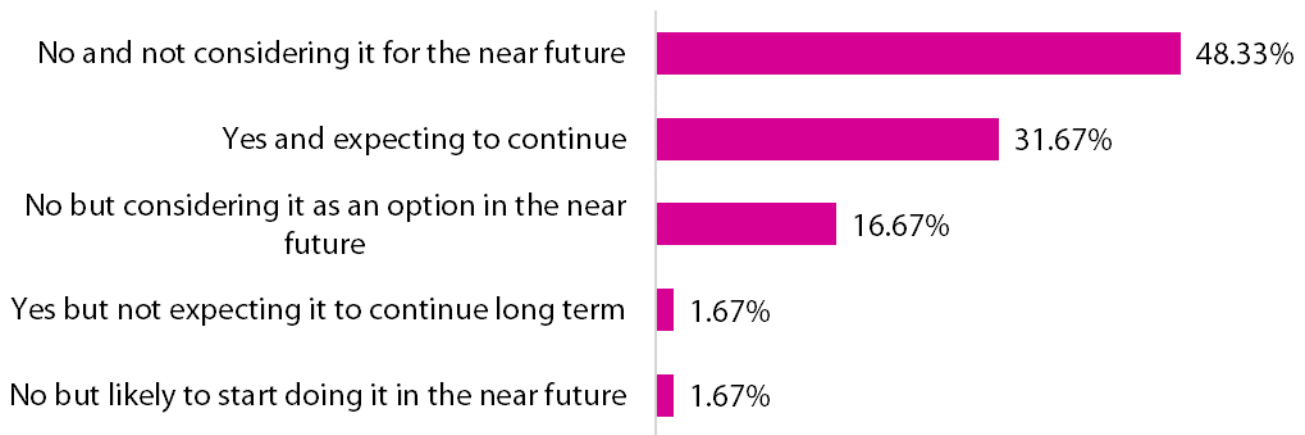
Most respondents have an in-house combined service (46.67%). 18.33% have an in-house service but with some elements run by external contracts, 18.33% have an in-house client/contractor split, 15.00% have externally provided services and 1.67% have a joint venture company.

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



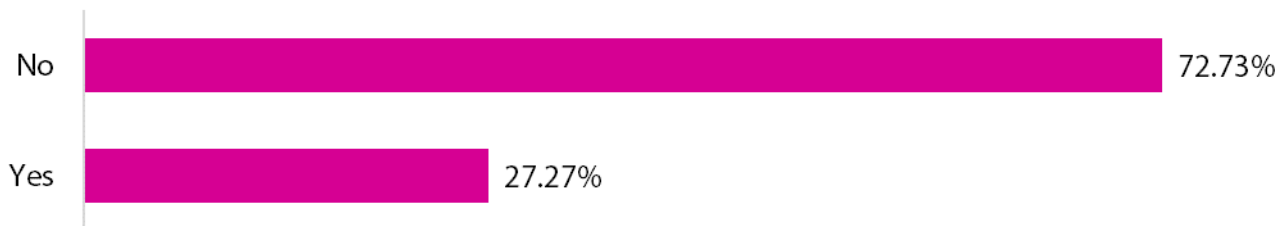
The majority of respondents expect the service to remain in-house over the next 12 months (96.08%).

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



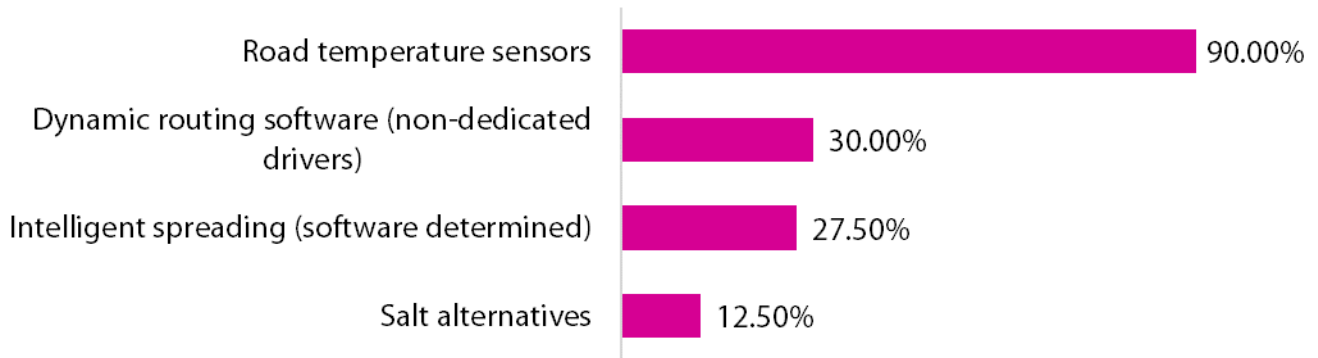
48.33% do not currently sell services to organisations external to the council and are not considering it for the near future, 16.67% are considering it as an option and 1.67% are likely to start doing it in the future. 31.67% are doing so and are expecting to continue, and 1.67% are doing so currently but are not expecting it to continue long term.

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



27.27% have a snow warden or similar scheme in place.

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



90.00% use road temperature sensors, 30.00% use dynamic routing software to assist the service, 27.50% use intelligent spreading software and 12.50% use salt alternatives.

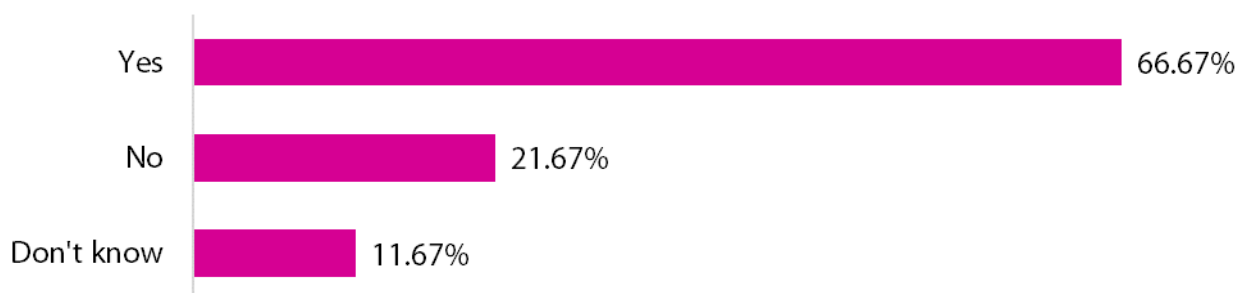
Do you use a weather forecasting service? (If so, which one?)

Among the respondents that use weather forecasting services, 56.82% use Meteo Group and 43.18% use MetDesk.



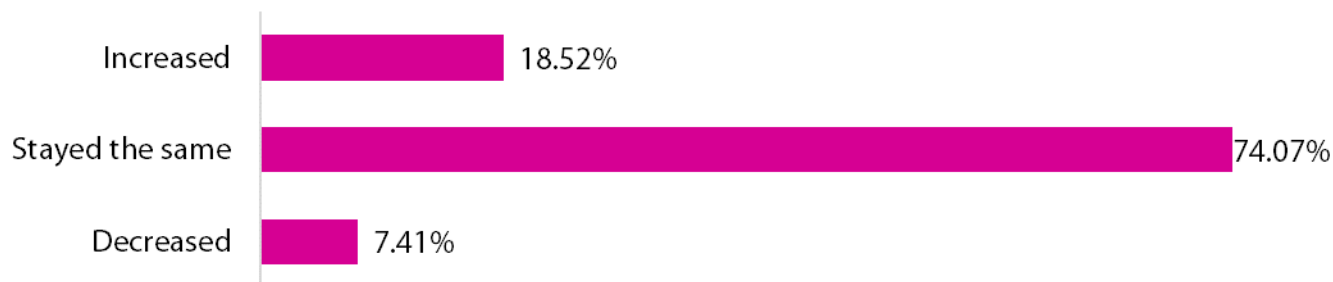
Has your authority declared a climate emergency?

66.67% of respondent's authorities have declared a climate emergency.



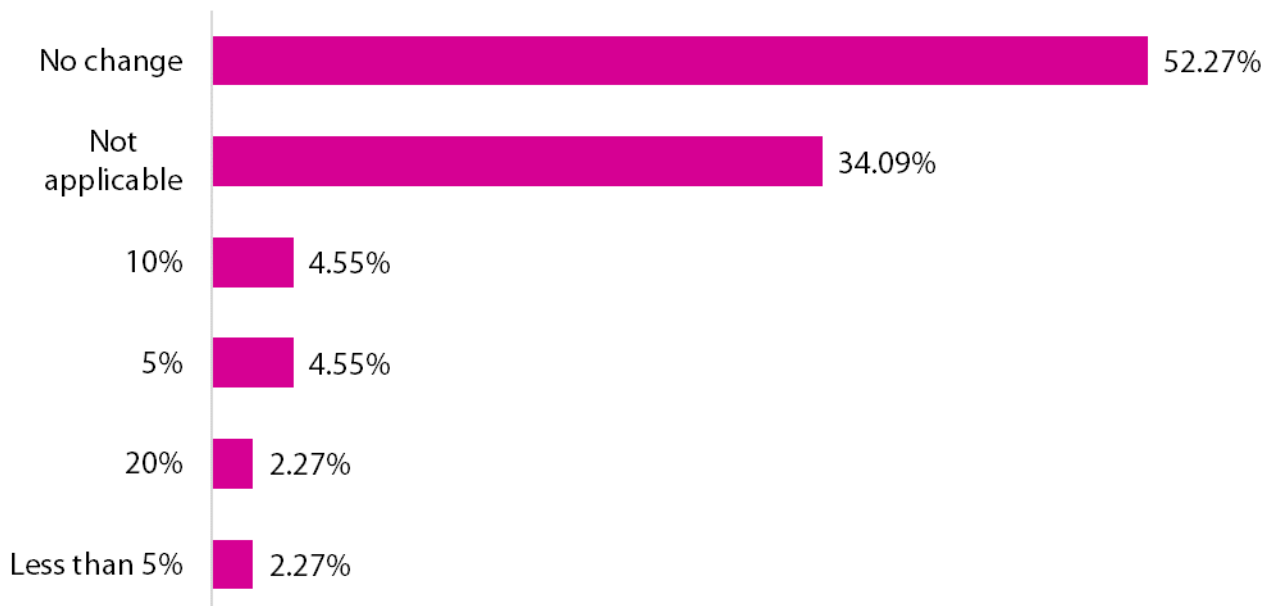
Section 2 – Budget

How has the budget for the winter maintenance service changed from 2021-22 to 2022-23?



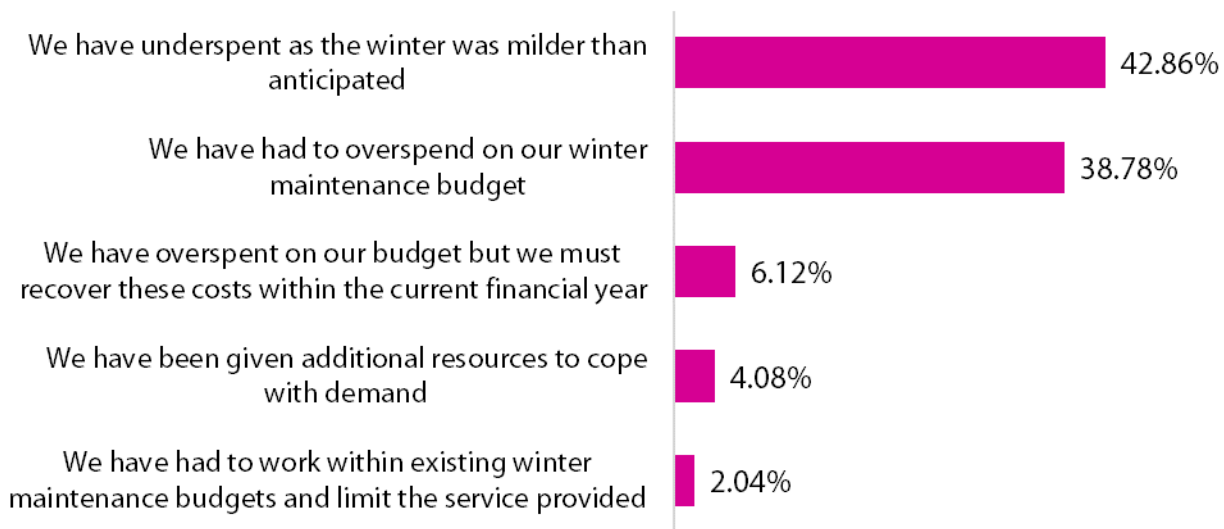
Most respondents indicated that their winter maintenance service budget has stayed the same (74.07%), 18.52% said it has increased and 7.41% said it has decreased.

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



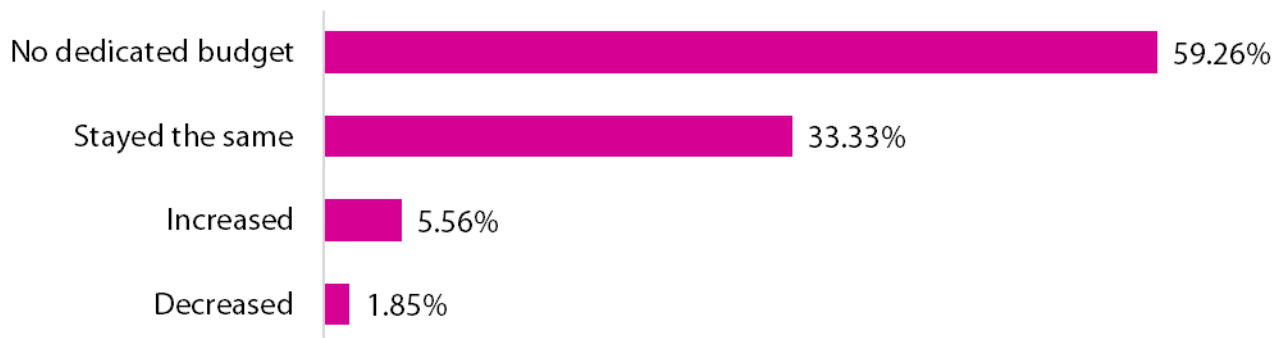
The majority of respondents' budgets have decreased by 10% or 5% (4.55%), though most survey respondents had not experienced budget decreases.

With reference to the weather during the winter 2021-2022, what has been the impact on your winter maintenance budget?



The majority of respondents underspent on their budgets as the winter was milder than anticipated (42.86%). A large number had an overspend on their budgets (38.78%).

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



Most respondents with a dedicated training budget felt this had stayed the same (33.33%), with 5.56% experiencing an increased budget and 1.85% a decreased budget.

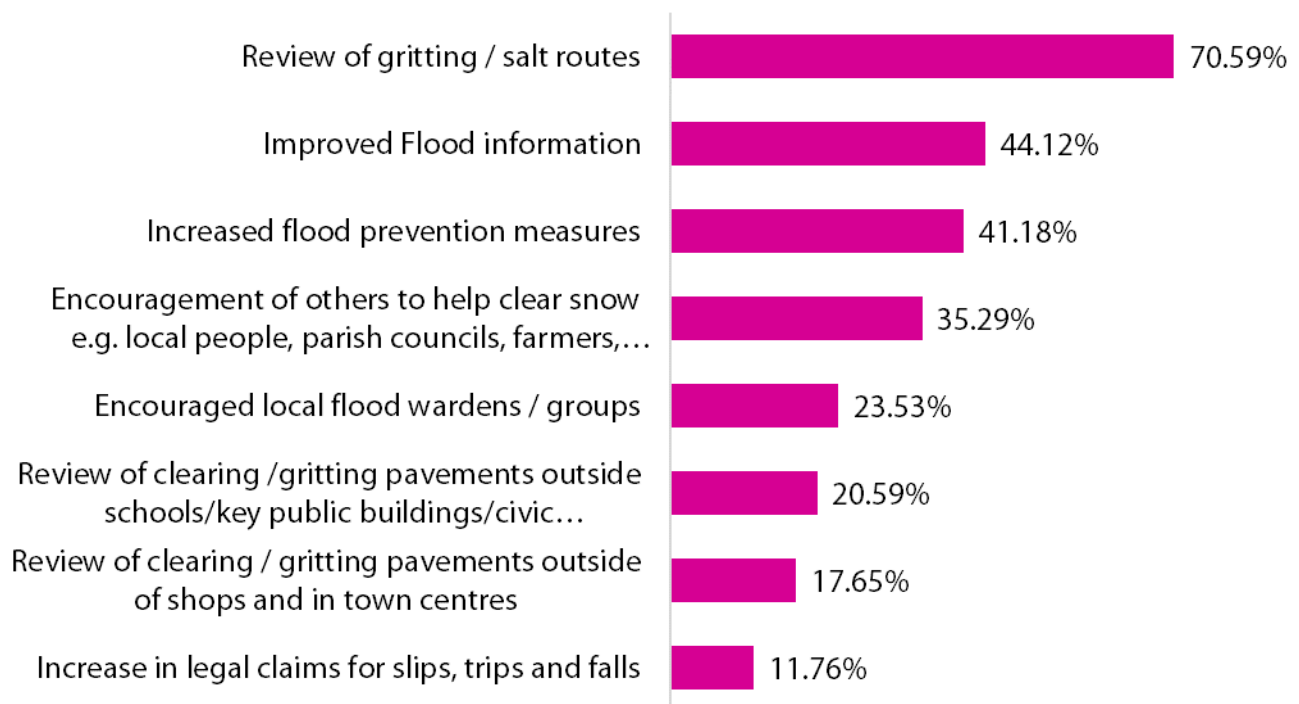
Section 3 – Severe Weather

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:

- Covered salt storage increases
- Route based forecasting
- Using external contractors in severe weather
- Improved road user communications
- Devised a better emergency plan with farmers
- Optimised carriageway gritting routes
- Added more grit bins to the network
- Introducing liquid de-icer on footways
- Increased treatment on active travel routes
- Utilising officers to drive winter vehicles

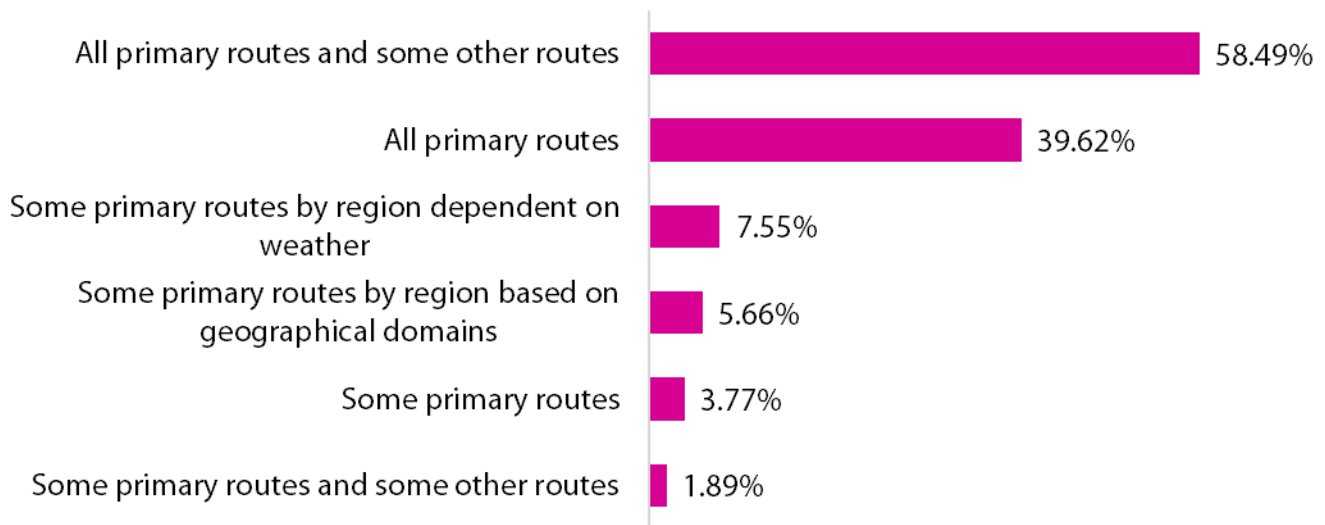
Has the severe weather over the recent years led to any of the following (you may answer more than one)?



The severe weather has led 70.59% to review gritting / salt routes, 44.12% have improved flood information, 41.18% have increased flood prevention measures and 35.29% have encouraged others to help clear snow (e.g. local people, parish councils, farmers).

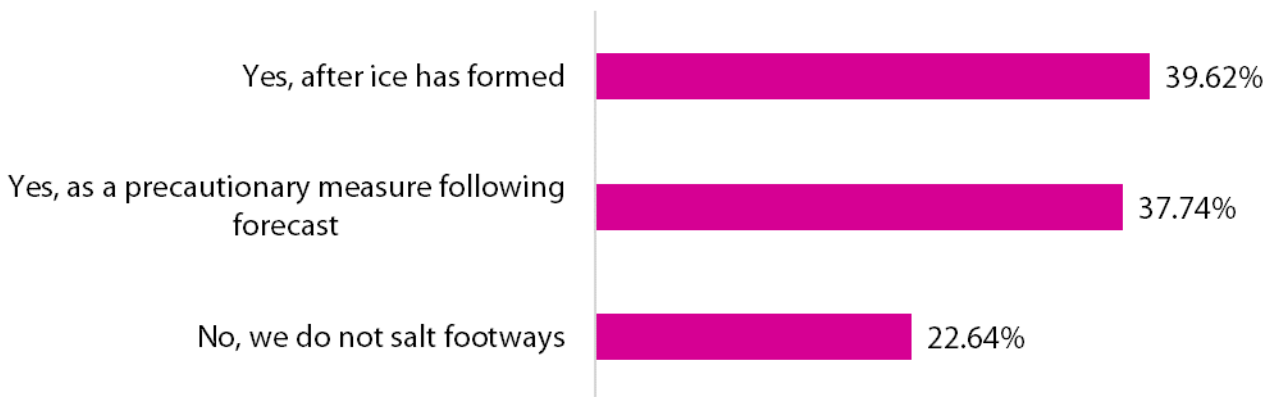
Section 4 – Salting

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



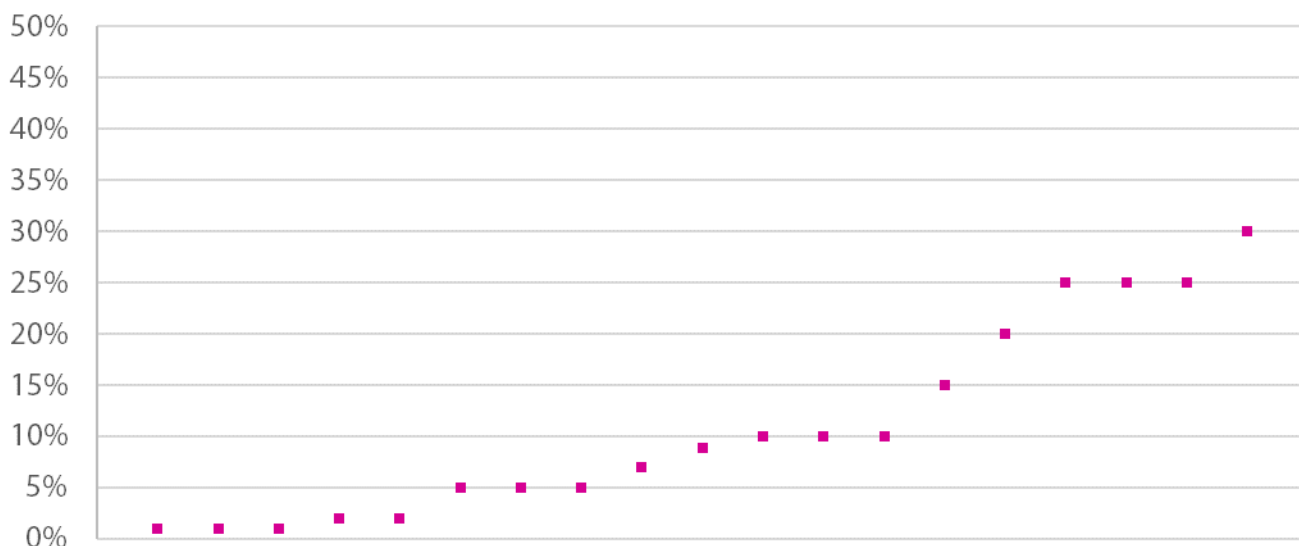
58.49% of respondents salt all primary routes and some other routes, and 39.62% salt only all primary routes. Other variations in approach are shown in the table above.

Do you salt footways?



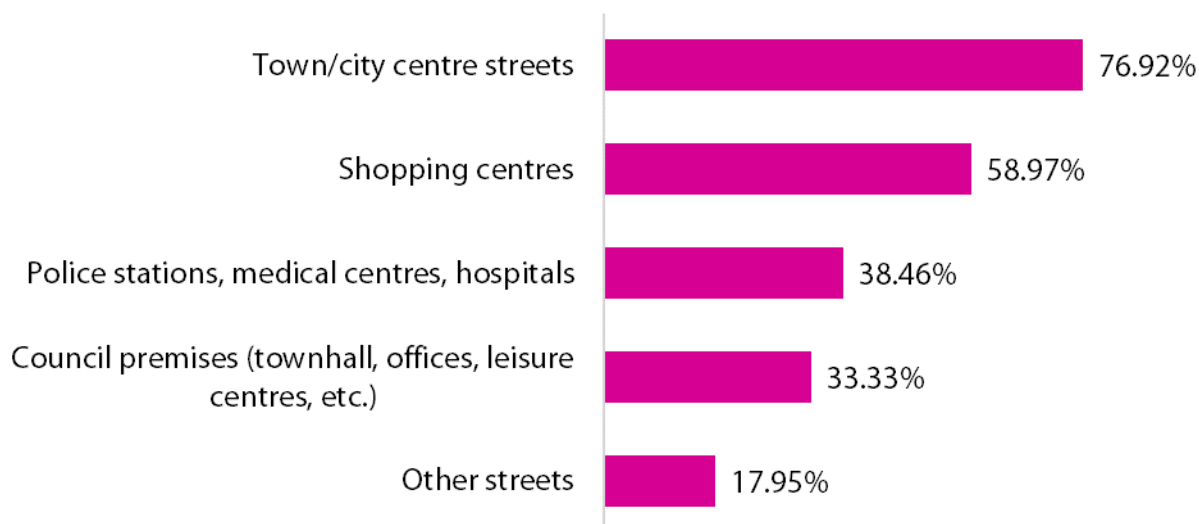
39.62% of respondents salt footways after ice has formed and 37.74% do this as a precautionary measure following forecast. 22.64% do not salt footways.

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



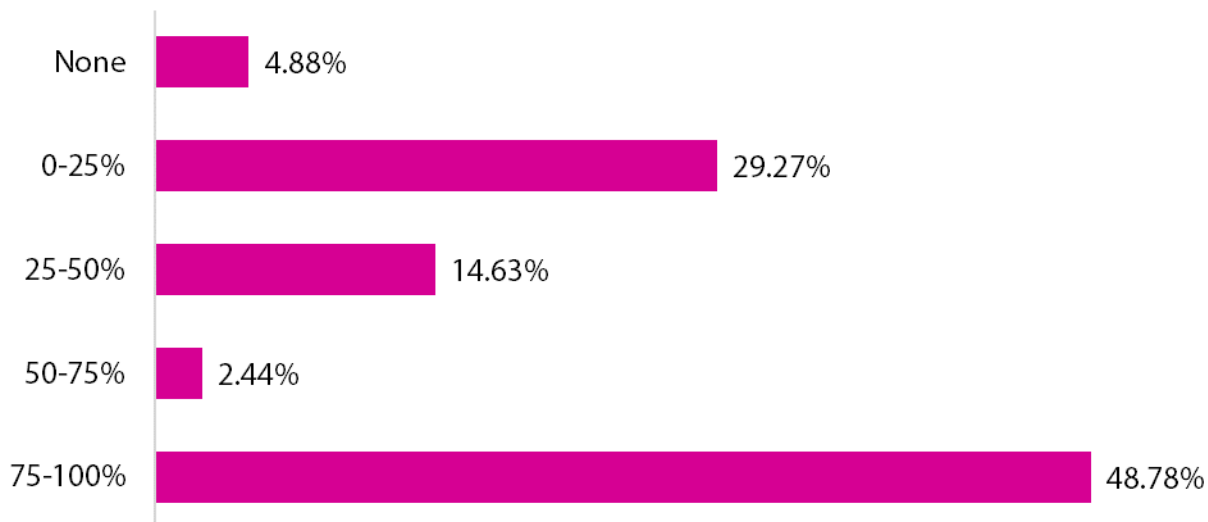
The percentage of footway network salted for most authorities was roughly 10% or under with the top respondent salting 46% of footways.

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



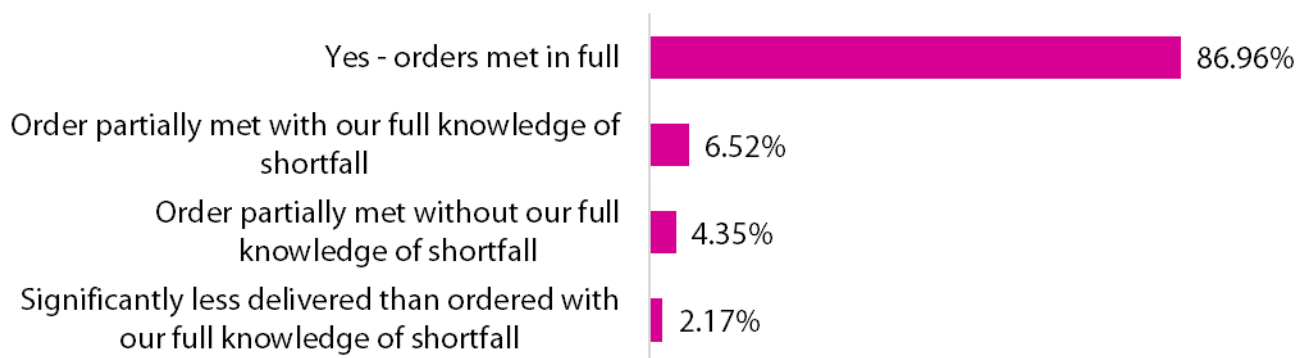
The majority of respondents salt the footways of town/city centre streets (76.92%) and shopping centres (58.97%). 38.46% salt police stations, medical centres and hospitals, 33.33% salt council premises (town hall, offices, leisure centres, etc) and 16.28% salt other streets.

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



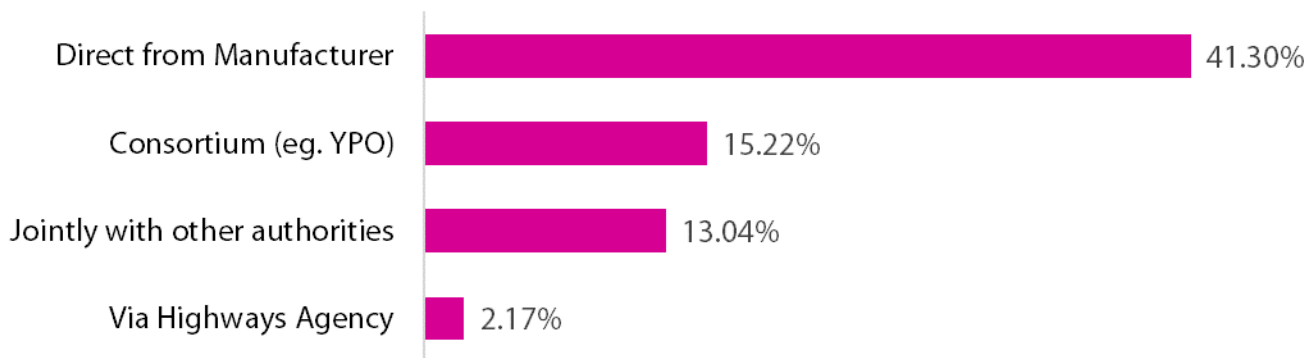
Most of the respondents managed to carry out between 75-100% of necessary footway salting (48.78%), with 2.44% carrying out 50-75%, 14.63% carrying out 25-50% and 29.27% carrying out 0-25%. 4.88% carried out none of the necessary footway salting.

Have the orders you placed for salt to cover winter maintenance over 2021-22 been met by your suppliers?



86.96% of survey respondents salt orders were met in full to cover winter maintenance over 2021-22.

How do you purchase salt supplies?



41.30% purchase salt directly from the manufacturer, 15.22% purchase salt through a consortium, 13.04% purchase salt jointly with other authorities and 2.17% purchase through the Highways Agency.

Which company supplies your salt?

- Compass Minerals (22)
- ICL UK (Sales) Limited (4)
- Peacock Salt (1)
- Safecote (1)
- Salt Solutions (1)
- Irish Salt Mining (6)
- Salt Union (4)
- Cleveland Potash (1)
- Salt Sales (1)

Most of the responding authorities were supplied by Compass Minerals.

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:

- Order well in advance
- Have a strategic stock pile
- Have deliveries more frequently
- Share stocks during extreme events
- Monitor stock usage closely
- Maintain a contractual agreement with the haulier

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:

- Dedicated cycleways and active travel
- Information technology
- Road temperature sensors
- Innovations in forecasting
- Strategic salting of footways
- Electric vehicles

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:

- Reduction in bus routes
- General cuts to winter service
- Ageing workforce and lack of youth replacing them
- Percentage of network salted
- Gritting of lesser used carriageways
- Retaining HGV drivers

Local Authority Winter Maintenance Services

State of the Market 2022

APSE Comment

Winter maintenance has come under budget pressure over the last decade as climate change has produced milder and wetter winters. Flooding is now a greater risk than in previous decades. Route optimization, better forecasting and sensor technology has allowed focus on a more controlled and directed service. Increasingly Active Travel has been added to the mix, requiring additional treatment in cycleways and footways that have previously been ignored. Snow wardens have been replaced by flood wardens, but these support networks quickly wither if conditions don't require them.

APSE forecast further refinement of the gritting process allowing more authorities to determine their gritting trigger at 0 degrees rather than the 0.5 or 1 degree trigger used by many. Several authorities are also experimenting with more environmentally friendly vehicles, although fully electric versions are not really a option at present

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. Post Covid-19, these are held as a blended event online and in-person, 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
- Recovery and Renewal

- Renewables and Climate Change
- Sports and Leisure Management
- Vehicle Maintenance and Transport
- Waste Management, Refuse Collection and Street Cleansing