

State of the Market Survey 2022

Local Authority Highways 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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Results at a glance

Service delivery	
% whose service is delivered in-house	81.39%
% who currently sell their services to organisations external to the council and expect to continue	28.95%
% who are fully prepared for the introduction of Well managed Highways Infrastructure	31.43%
% who have seen an increase in the number of claims referring to vehicular damage as a result of highway condition over the past 3 years	75.00%
% who have seen an increase in legal claims for slips, trips and falls over the past 3 years	33.33%
% who estimate the existing damage to roads in their council area will never be repaired to an acceptable standard	32.26%
Budgets	
% whose budget decreased from the last financial year	19.05%
% whose highways maintenance training budget has stayed the same over the past 12 months	88.89%
Staffing	
% who personally feel staff absence levels are not at an acceptable level	20.51%
% who run an apprenticeship scheme for the service	80.56%
% with difficulty recruiting operatives	79.41%
% with difficulty retaining operatives	64.71%
% with difficulty recruiting technical/managerial staff	86.11%
% with difficulty retaining technical/managerial staff	52.78%
Average age of highways maintenance staff	47 years

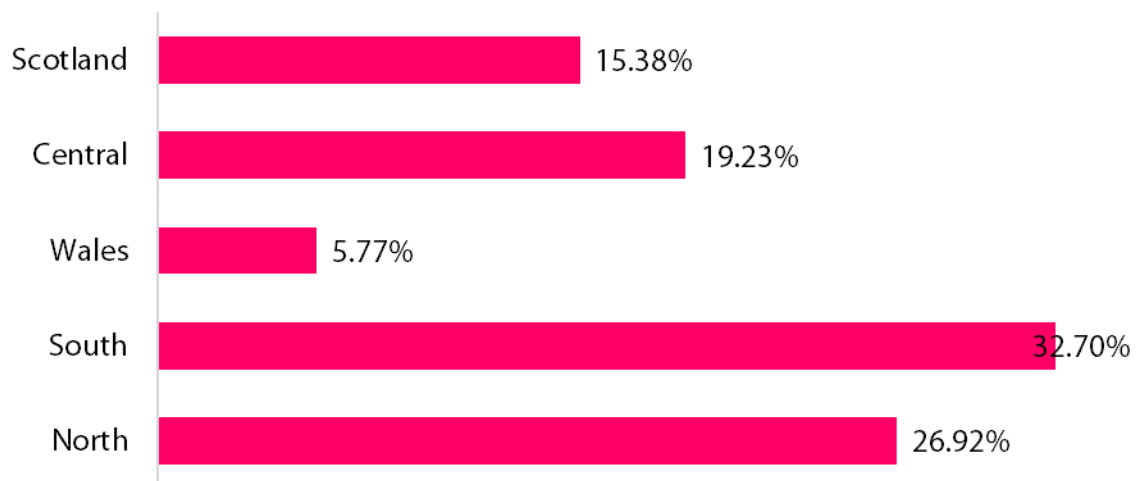
Introduction

APSE conducted an online survey during ~~May to June~~Summer-2022. A series of questions were asked covering a range of issues of interest to those officers, managers and councillors responsible for Highways 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 highways services rather than a thorough analysis of change over time. [However the results are triangulated against other APSE data sources such as APSE Performance Networks.](#)

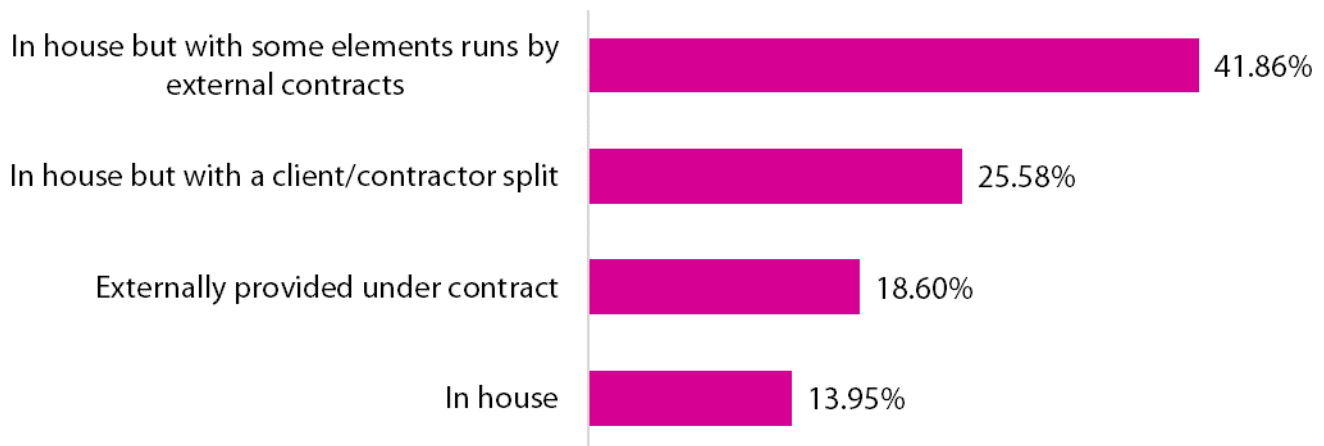
Where in the UK do you work?



The table above shows the breakdown of where the respondents to the survey are located in the UK. [Local authorities in Northern Ireland do not have responsibility for Highways Services.](#)

Section 1 – The Service

How are your highways services currently delivered?



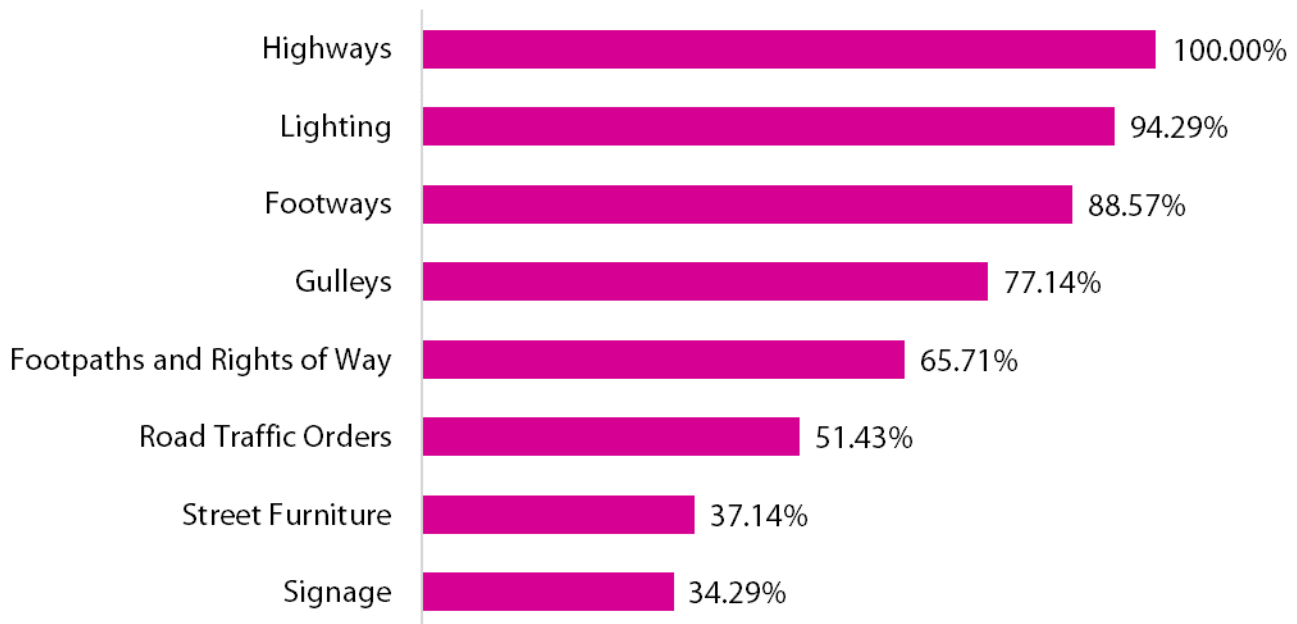
81.39% of highways services are currently delivered in house, 18.60% are externally provided under contract. Most respondents run in house services but with some elements run by external contracts (41.86%).

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



All respondents with in-house services expected their service to remain in-house over the next 12 months, though one respondent said they were exploring outsourcing winter gritting.

What assets do you currently hold within your asset management system?



All respondents held highways (100.00%) in their asset management system; the majority held lighting (94.29%), footways (88.57%), gullies (77.14%), footpaths/rights of way (65.71%) and road traffic orders (51.43%). 37.14% also held street furniture and 34.29% held signage in their asset management system.

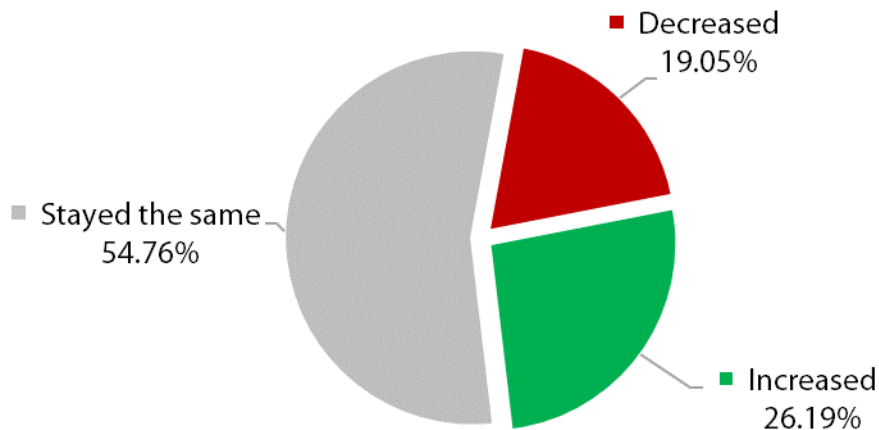
Respondents also held a number of other things in their asset systems including illuminated signs, trees, bridges, structures and drainage systems.

What Asset Management System do you use?

The most common answers to this question were Confirm, Symology, WDM, Mayrise, AMX, Bridgestation, Ezytreev, Horizons, Kaarbontech and ParkMap. Other answers included CAMS, Fulcrum, Kompass, Map16, MUSE, Street Manager, Uniform and Xais PA.

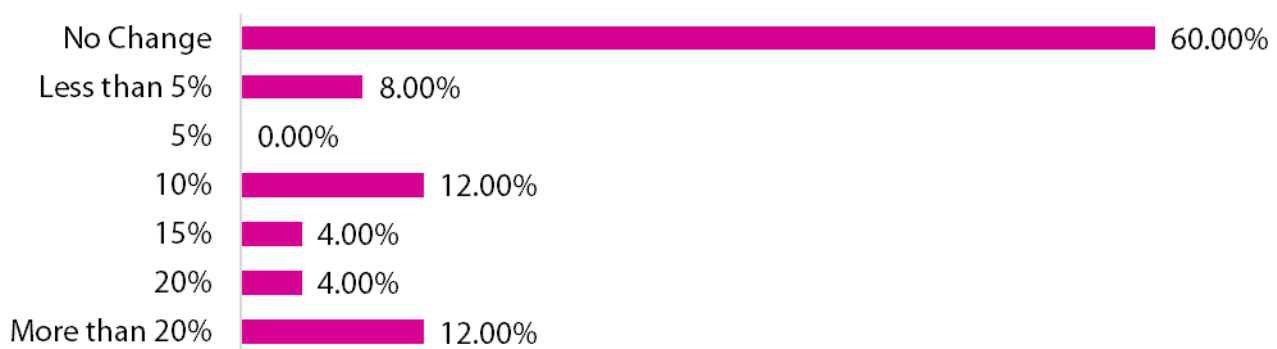
Section 2 – Budget

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



For the majority of respondents, the budget for the highways service stayed the same from the last financial year (54.76%); 26.19% said it had increased, and 19.05% said it had decreased. A respondent who answered that their budget has increased said that they would argue it has decreased with the increased in material costs, and that one contract had increased by 12%.

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



For the respondents who experienced budget decreases, most experienced a decrease of 10% or more than 20%. [The question of real-terms cuts to service budgets, related to the overall cost of providing](#)

[through labour cost increases, fuel and supply side inflation on materials will be further explored in next year's state of the market survey.](#)

To what extent will this year's budget for highways maintenance meet the need to fill potholes and resurface where necessary?



The extent to which this year's budget for highways maintenance met the need to fill potholes and resurface where necessary varied from authority to authority, but all respondents felt that it would not cover all of their needs.

One respondent noted that their current backlog is £259 million, and the funding directed to road and footway maintenance schemes in 2021/22 represented only 5.9% of their backlog. Other respondents felt that they are not keeping up with the overall decline in the condition of roads, and that budgets are impacting the ability to undertake the better repair option.

Do you run an apprenticeship scheme for the highways maintenance service?

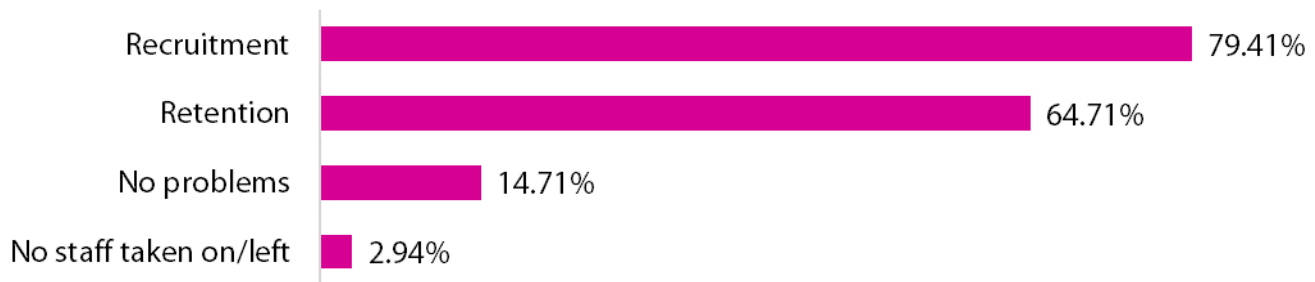


Most of the responding councils (80.56%) do run an apprenticeship scheme for the highways maintenance service. One respondent commented that they had none presently as none had been taken on during the pandemic.

Section 3 – Staffing

Where have you had difficulty recruiting or retaining staff (over the past 12 months)?

Operatives



79.41% of respondents have experienced difficulty recruiting operatives, and 64.71% have experienced difficulty retaining them. One respondent commented that it was difficult to recruit operatives at council salaries, and that they have an ageing workforce.

Technical/managerial staff



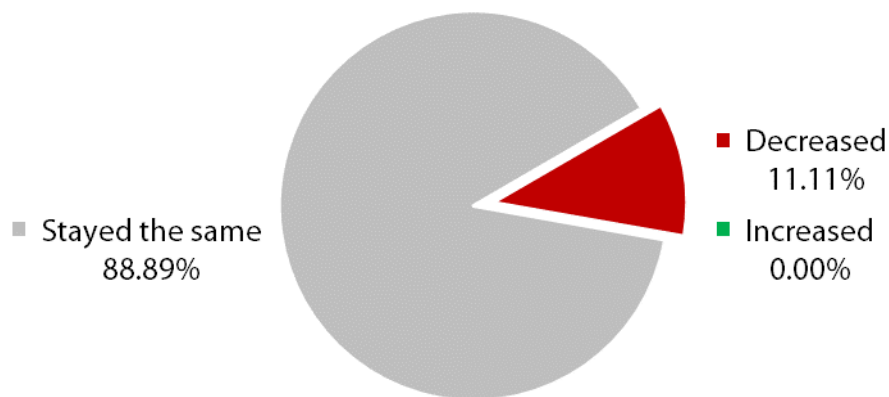
86.11% of respondents had experienced difficult recruiting technical/managerial staff, and 52.78% had issues retaining them.

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



The majority of respondents felt that staff absence levels are at an acceptable level (79.49%).

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



Over the past 12 months, the majority of highways maintenance training budgets have stayed the same (88.89%) and 11.11% have decreased.

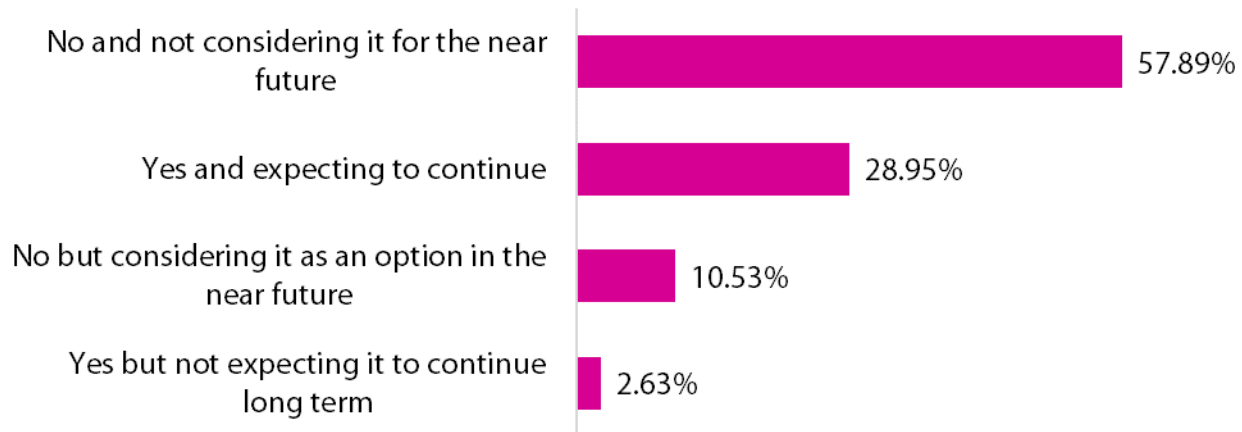
What is the average age of your highways maintenance operational staff?



The average age of highways maintenance operational staff among respondents was 47, with a lowest being 32 and the highest being 57.

Section 4 – Service Delivery

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



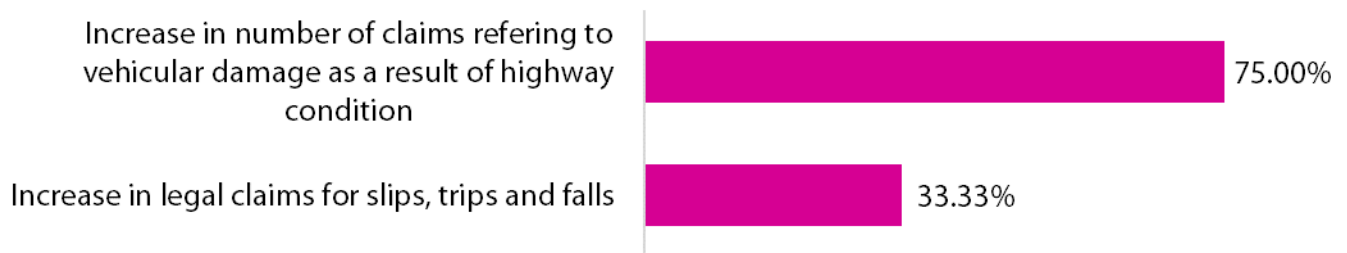
57.89% are not selling their services to organisations external to the council and are not considering it for the future; 10.53% were considering it. 28.95% are selling services and are expecting to continue, and 2.63% are doing so but are not expecting it to continue long term.

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



All respondents who answered this question were using simple charging mechanisms.

Has the severe weather over the past 3 years led to any of the following?



75.00% of respondents felt that the severe weather over the past 3 years has led to an increase in the number of claims referring to vehicular damage as a result of the condition of the highway. 33.33% had experienced an increase in legal claims for slips, trips and falls.

Section 5 – Opinions

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

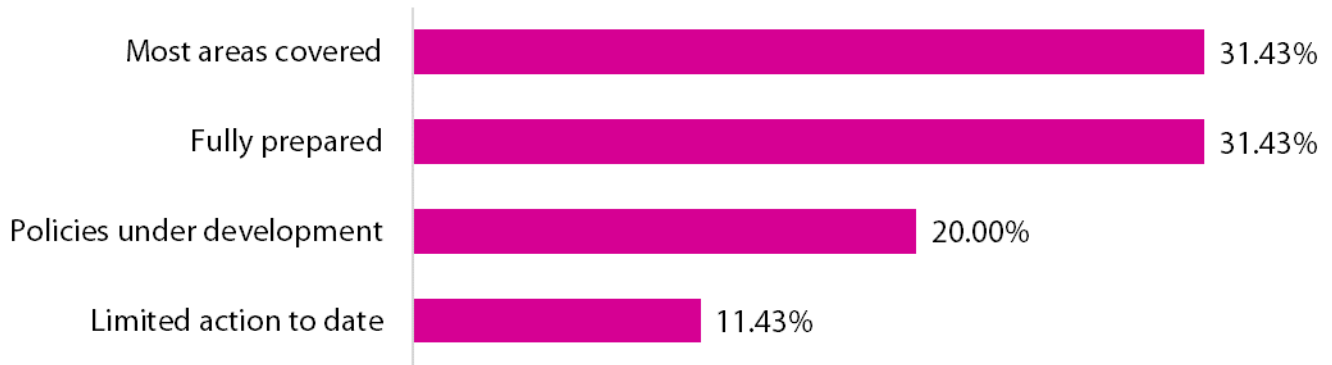
- Ash dieback
- EV charging
- Carbon reduction
- Drainage technology
- Flood management
- Active travel
- Recruitment and retention activities
- Investment in road repairs technologies
- Severe weather
- Improvement schemes
- Work for external developers
- Reactive maintenance
- Gully cleansing
- Sustainability issues
- Street works
- Longer-term wider ventures

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

Some respondents did not see any areas where work may decrease, but common answers included:

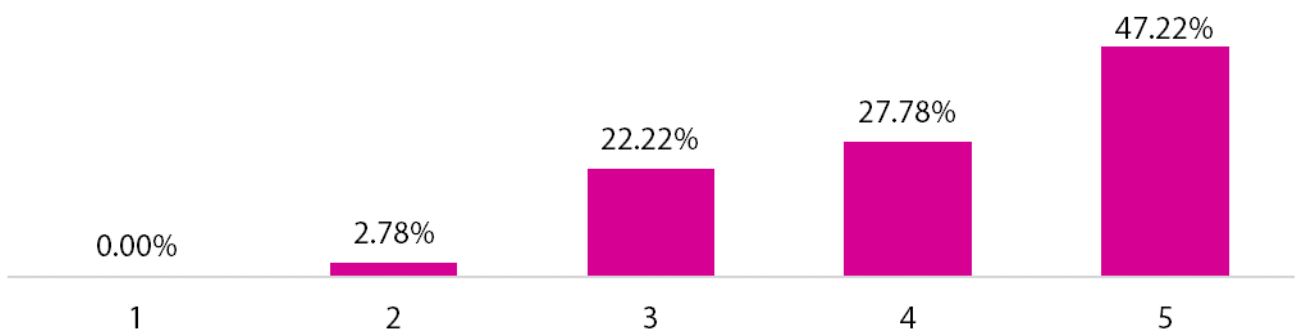
- LED replacement
- Reactive defect repairs
- Carriageway surfacing
- Works due to reductions in capital maintenance funding
- New road construction
- Commercial activity
- Cyclic gully cleansing
- Schemes in general due to increased costs for fuel and materials
- Schemes in general due to the lack of available contractors
- Surface treatments

How prepared are you for the introduction of the New Code of Practice “Well managed Highways infrastructure”?



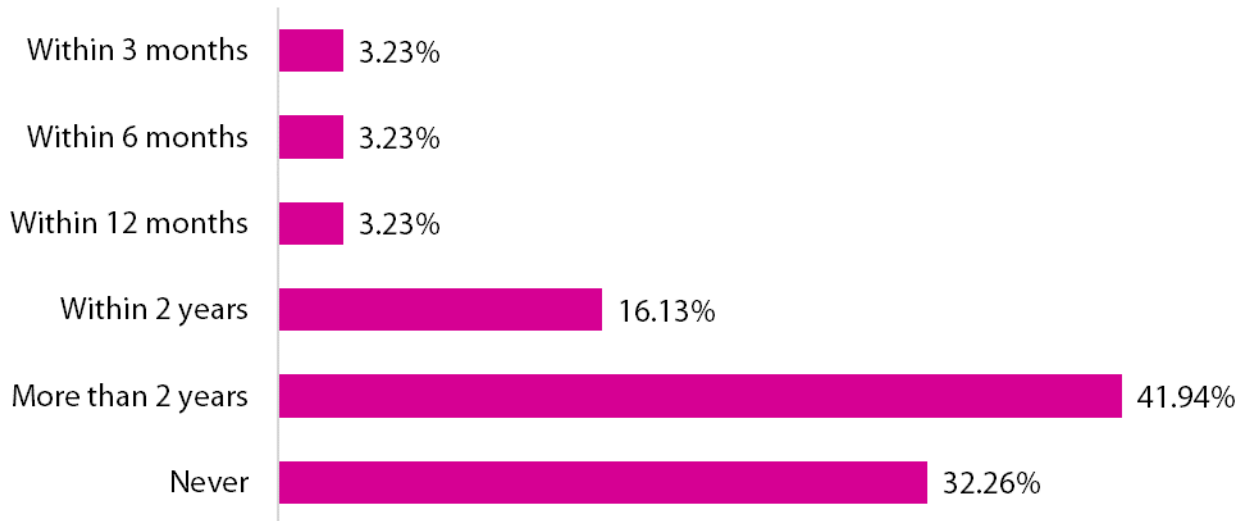
Most respondents felt that they were either fully prepared (31.43%) or had most areas covered (31.43%), 20.00% had policies under development and 11.43% had taken limited action to date.

**How strongly do you rank your council’s approach to defending claims?
(from 1 weak to 5 strong)**



Most respondents felt that their council’s approach to defending claims was strong (47.22%).

When do you estimate the existing damage to roads in your council area will be repaired to an acceptable standard by?



Most respondents estimated that the existing damage to roads in their council area will be repaired in more than 2 years (41.94%) or never (32.26%). Estimates for some councils were as high as 50 years.

What is the most innovative development in highways maintenance you have seen in recent times?

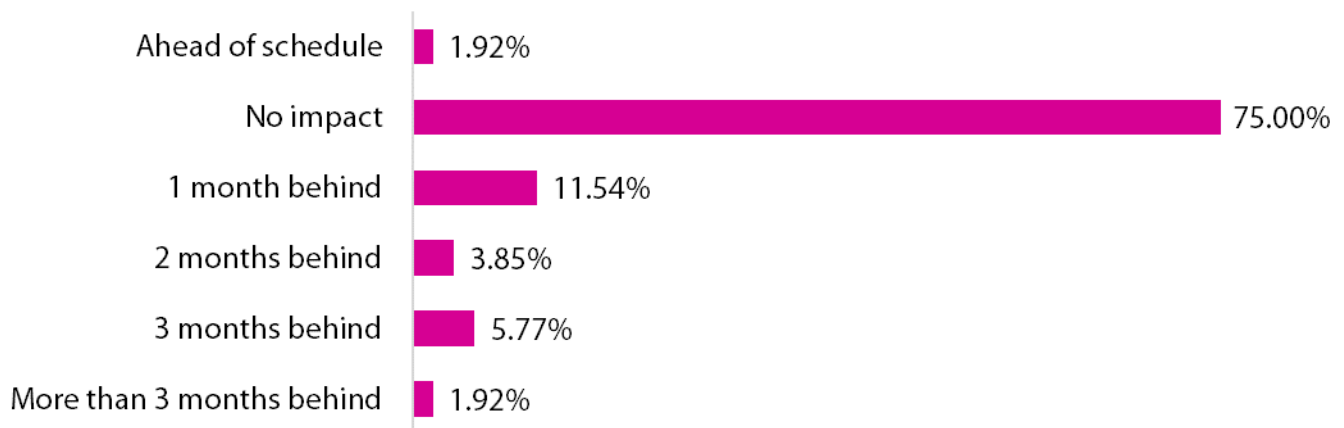
Answers to this section included:

- Low temperature materials
- AI carriageway condition surveys
- Remote sensing
- Asset management software
- Warm asphalts
- Using grass cuttings to make vehicle fuel
- Mobile technology
- Pothole repair machines and methods

Section 6 – The Pandemic

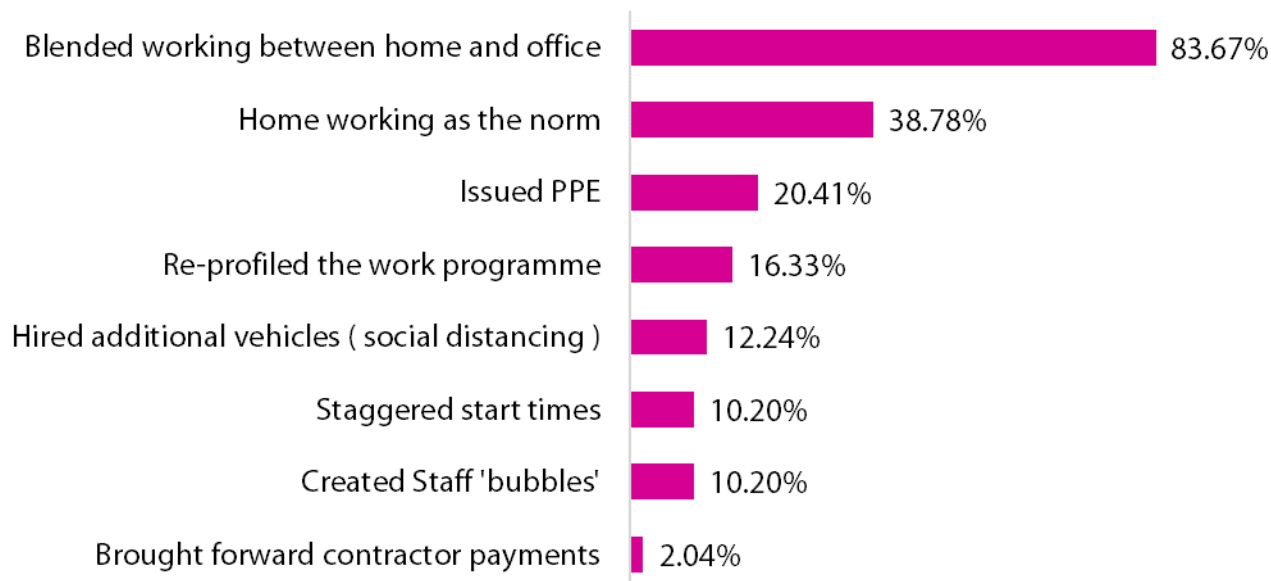
Section 6 has been added to the survey to determine how COVID-19 has impacted on the resurfacing schedule and the practices that have changed.

How has COVID-19 impacted on your 2022 resurfacing schedule? How many months behind schedule are you?



The majority of respondents (75.00%) felt that COVID-19 had no impact on the 2022 resurfacing schedule.

Have you changed practices for COVID-19? (Please tick all that apply)



Loc

al authorities have had to change many different processes due to the impacts of COVID-19. The most popular changed practices by the respondents included blended working between home and office (83.67%), home working as the norm (38.78%) and issuing PPE (20.41%) among others.

Local Authority Highways Services

State of the Market 2022

Highways was one service area that performed strongly throughout Covid with 75% stating that it had not affected their works schedules. The investment available against the financial cost to bring the highways asset up to an acceptable standard remains woeful with a third of authorities anticipating that they will never catch up. On top of this recruitment of technical staff and operatives remains a challenge with over 80% experiencing difficulties in attracting staff. Most have successfully adopted an [asset based](#) approach, although even this is now showing signs of failure especially on 'C' and minor roads.

[The Highways, Street Lighting and Winter Maintenance workstream at the recent APSE Performance Networks seminar expressed concerns that the under investment in the service, coupled with the inability to recruit and retain suitably qualified staff, will have a longer-term impact. The short-term approaches to financing the highways asset will lead to longer term deeper damage to the service which may not be immediately obvious. The sector experts suggest that the damage from the current economic climate may not be fully realised until 3 to 4 years time.](#)

Members can catch up on the latest developments and innovation in highways delivery via the free APSE Highways, streetlighting and winter maintenance advisory groups. Benchmarking is also available through APSE Performance Networks.

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
- [Cost of Providing/Cost of Living network](#)
- 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