



association for public service excellence

State of the Market 2023

Highways



Briefing 23/57
December 2023

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State of the Market 2023

Local Authority Highways Services

The state of the market survey was conducted by Rob Bailey, APSE Principal Advisor for Highways. The report was written and prepared by Garry Lee, Research and Coordination Officer.

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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.

Results at a glance

Service delivery

% whose service is delivered in-house	73.33%
% who currently sell services to organisations external to the council and expect to continue	26.92%
% 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	57.89%
% who have seen an increase in legal claims for slips, trips and falls over the past 3 years	21.05%
% who estimate the existing damage to roads in their council area will never be repaired to an acceptable standard	29.17%

Budgets

% whose budget decreased from the last financial year	50.00%
% whose highways maintenance training budget has stayed the same over the past 12 months	81.48%

Staffing

% who personally feel staff absence levels are not at an acceptable level	33.33%
% who run an apprenticeship scheme for the service	75.00%
% with difficulty recruiting operatives	79.17%
% with difficulty retaining operatives	62.50%
% with difficulty recruiting technical/managerial staff	84.62%
% with difficulty retaining operatives	62.50%
% with difficulty recruiting technical/managerial staff	84.62%

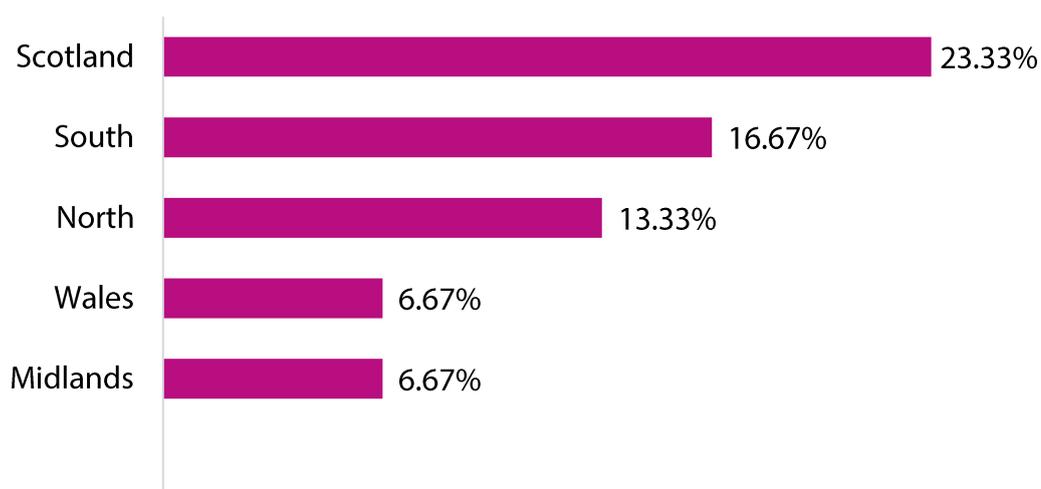
1 Introduction

APSE conducted an online survey during Summer 2023. 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.

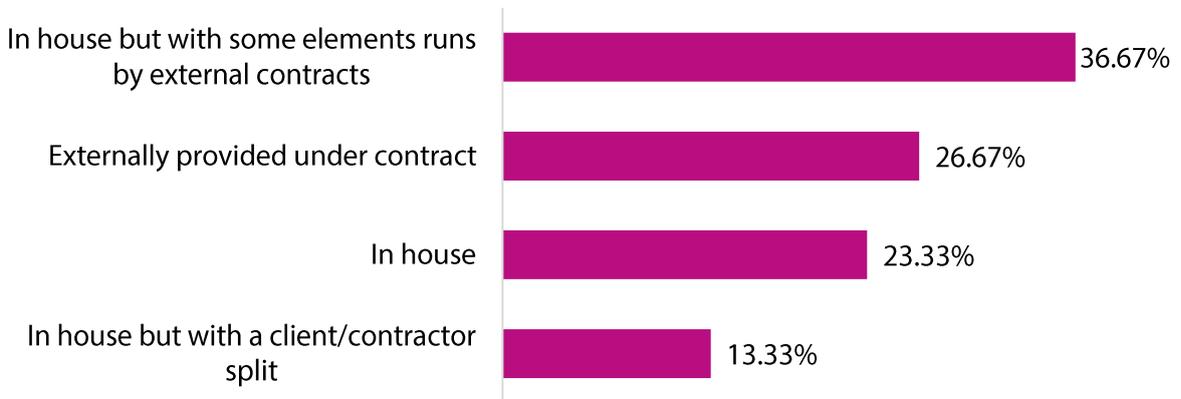
Where in the UK do you work?



The table above shows the breakdown of where the respondents to the survey are located in the UK. Within Northern Ireland the Highways service is located within a separate agency outside of local authority services.

2 Service

How are your highways services currently delivered?



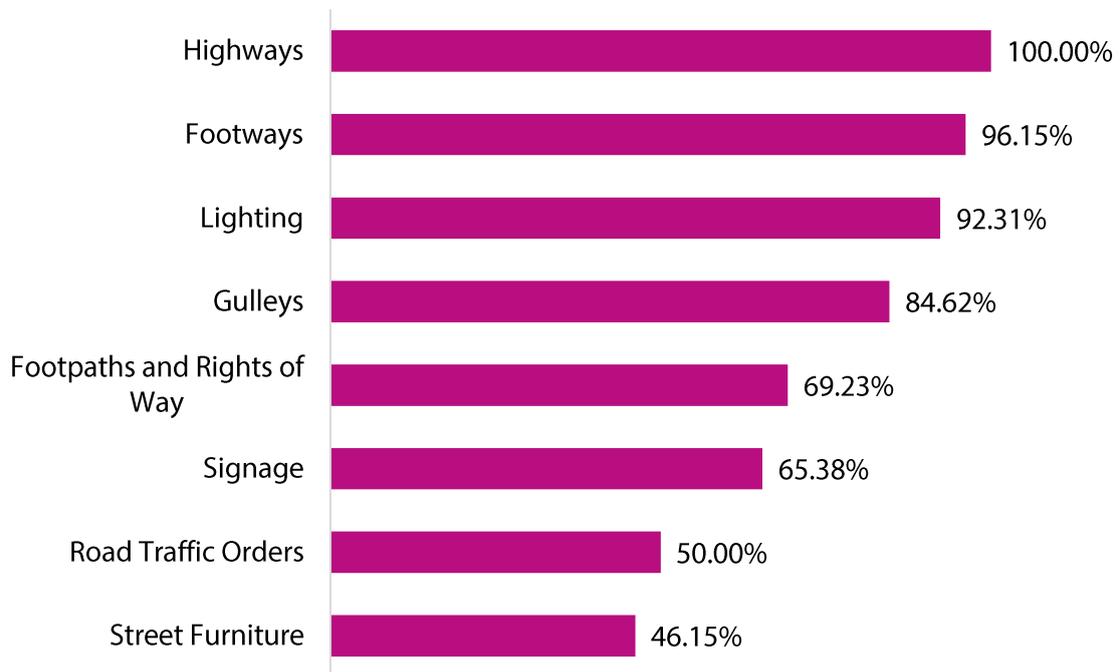
36.67% are currently delivered in house with some elements run by external contracts, 26.67% are externally provided under contract, 23.33% are delivered in house and 13.33% are delivered in house but with a client/contractor split.

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 more work going external due to staff availability and their focus on potholes.

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



All respondents held highways (100.00%) in their asset management system; they also held footways (96.15%), lighting (92.31%), gulleys (84.62%), footpaths/rights of way (69.23%), signage (51.43%), road traffic orders (50.00%) and street furniture (46.15%).

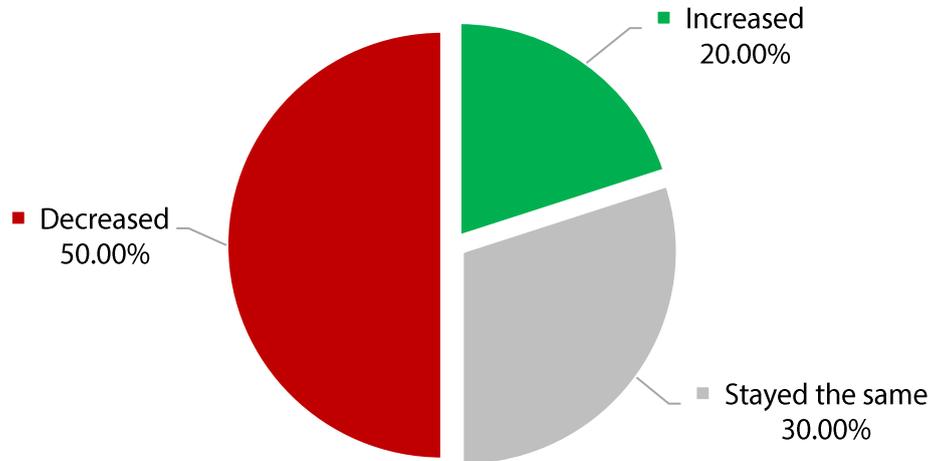
Respondents also held a number of other things in their asset systems including structures, traffic signals, CCTV and street lighting.

What Asset Management System do you use?

The most common answers to this question were WDM, Confirm, Symology and Yotta. Other answers included Bridgestation, ARCGIS, Mayrise, Alloy, Parkmap, Kaarbontech, AMX, CAMS, Expert Assets (XAIS Ltd), CityLink, GIS, and Vaisala.

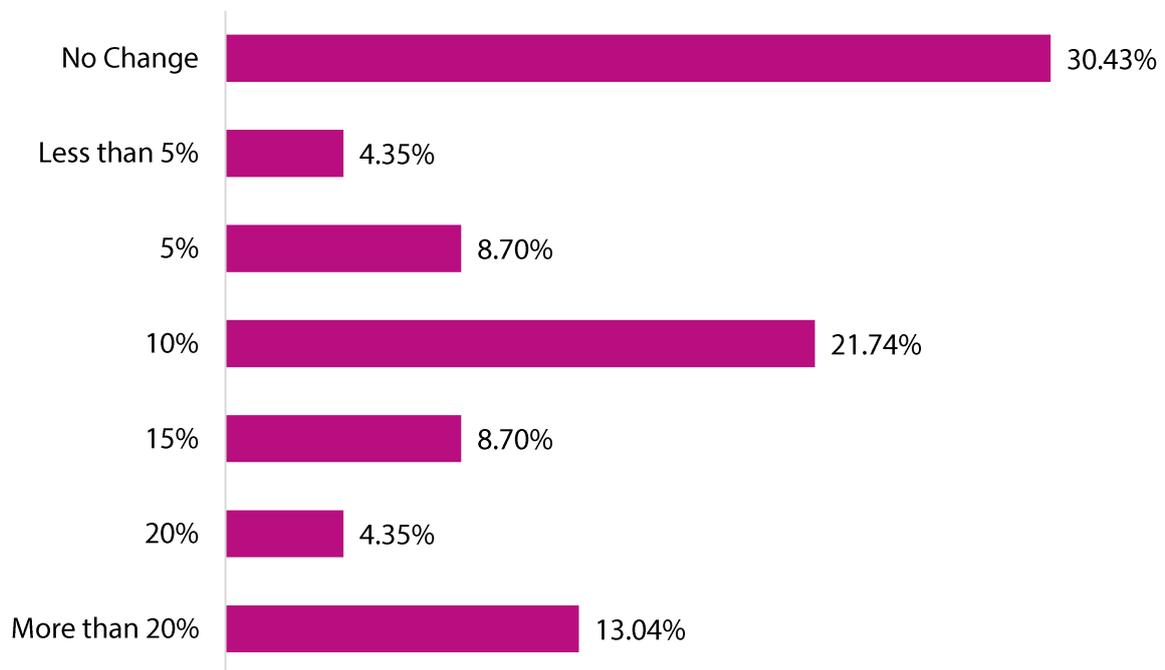
3 Budget

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



For half of the respondents, the budget for the highways service decreased from the last financial year (50.00%); 20.00% said it had increased, and 30.00% said it had stayed the same.

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



For the respondents who experienced budget decreases, 13.04% experienced a change of more than 20% and 21.4% experienced a decrease above 10% .

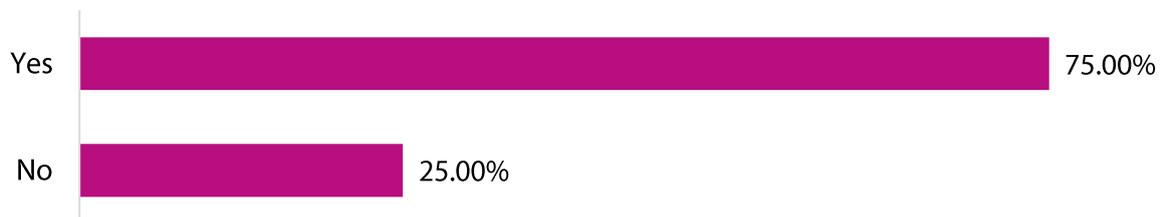
To what extent will this year's budget for highways maintenance meet the need to fill potholes and resurface where necessary?



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 years of underinvestment in capital resurfacing means that there is a significant backlog of required surface treatments. Another respondent stated that their target condition is not 100% in good condition, and instead their aim is to reduce the rate of carriageway deterioration over a longer time period.

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



Most of the responding councils (75.00%) do run an apprenticeship scheme for the highways maintenance service.

4 Staffing

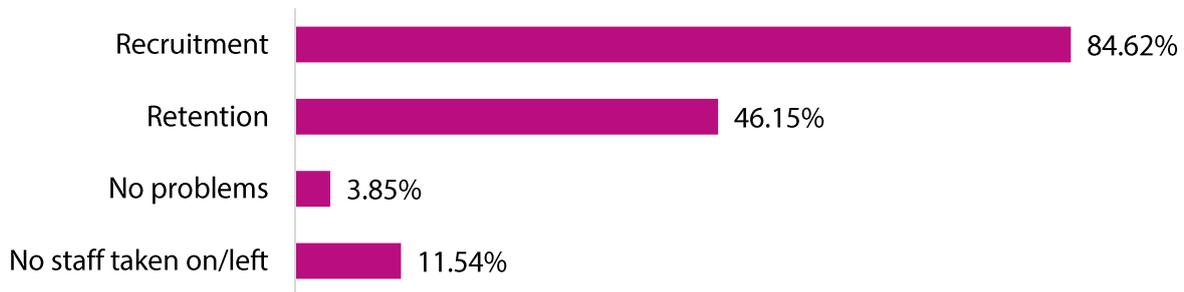
Where have you had difficulty recruiting or retaining staff (over the past 12 months)?

Operatives



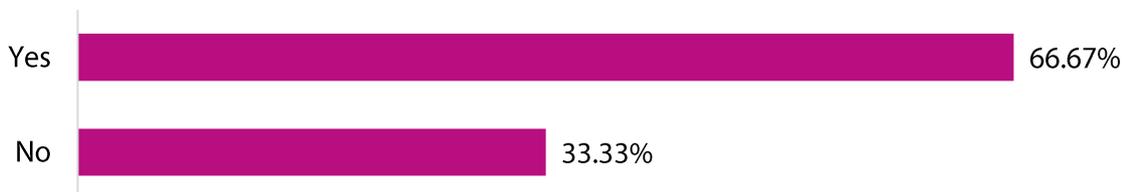
79.17% of respondents have experienced difficulty recruiting operatives, and 62.50% have experienced difficulty retaining them. One respondent noted that specialist areas such as drainage have been particularly difficult to fill.

Technical/managerial staff



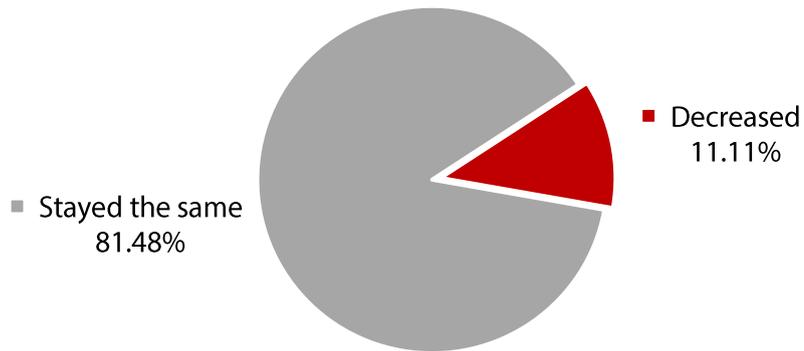
84.62% of respondents had experienced difficulty recruiting technical/managerial staff, and 46.15% had issues retaining them.

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 (66.67%). One respondent noted that they had higher sickness levels among operatives than technical/managerial staff.

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 (81.48%) and 11.11% have decreased.

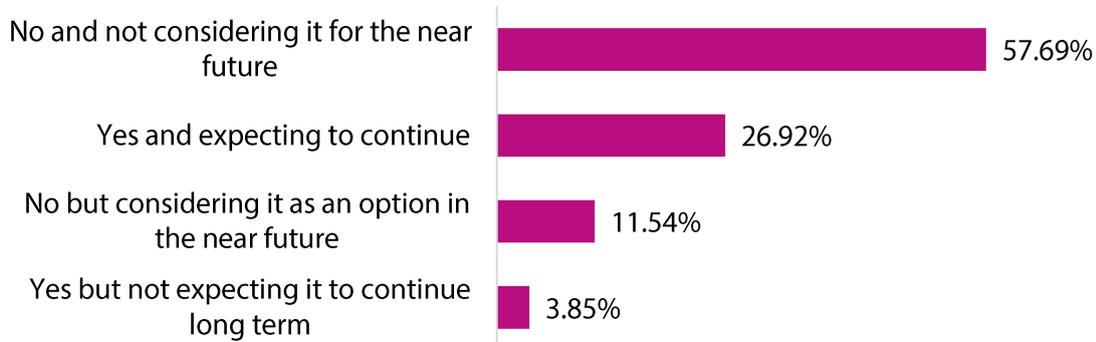
What is the average age of your highways maintenance operational staff?



The average age of highways maintenance operational staff among respondents was 46.6, with the lowest being 30 and the highest being 56.

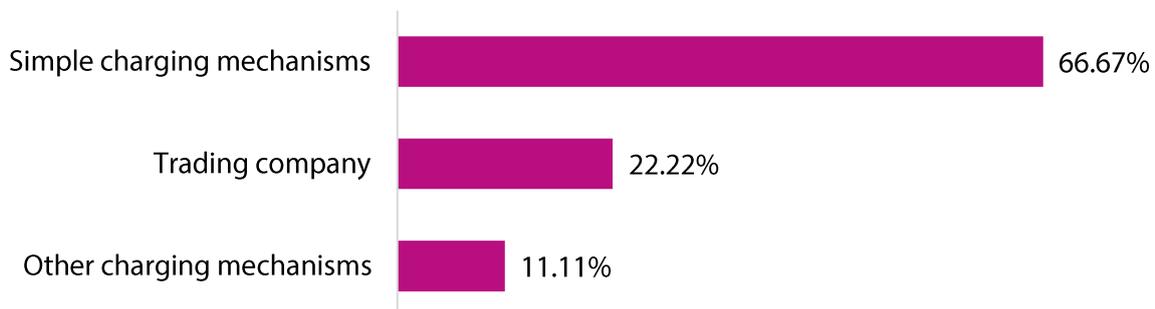
5 Service Delivery

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



57.69% are not selling their services to organisations external to the council and are not considering it for the future; 11.54% were considering it. 26.92% are selling services and are expecting to continue, and 3.85% are doing so but are not expecting it to continue in the long term.

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



66.67% were using simple charging mechanisms, 22.22% were using a trading company and 11.11% were using other charging mechanisms.

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



57.89% 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. 21.05% experienced an increase in legal claims for slips, trips and falls.

6 Opinions

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

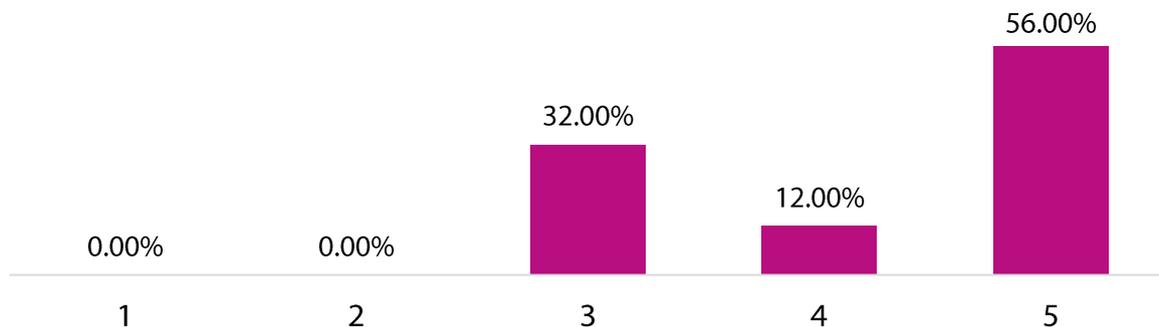
- CCTV and Security
- Advertising
- Carbon neutral options
- Highway repair schemes
- Potholes
- Drainage
- Adoption of new developments
- External revenue
- Digitisation
- Parking
- Active travel projects
- Footway resurfacing
- CITB approved apprenticeships
- Succession plan for highway operations
- Winter maintenance efficiencies
- Carriageway deterioration modelling

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:

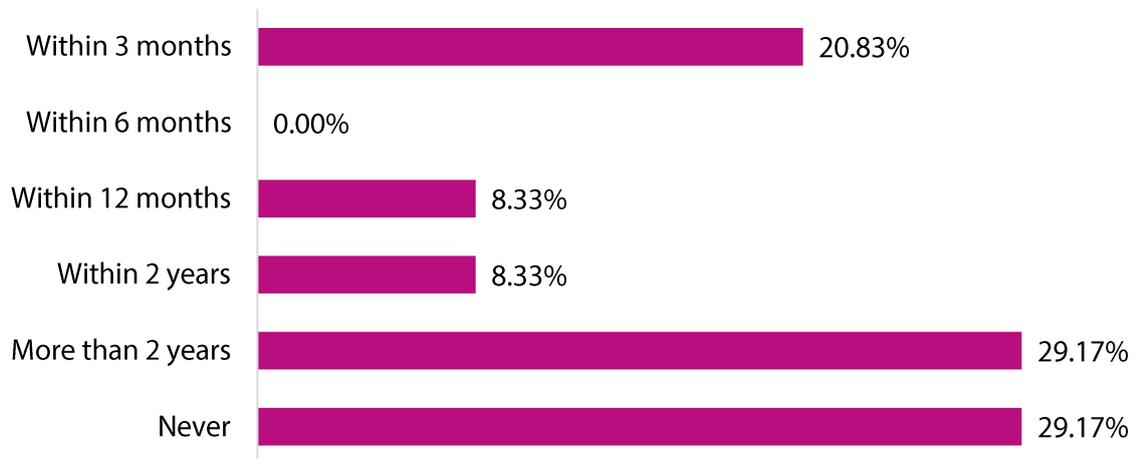
- Impact of materials cost
- Income generating work
- General repairs
- Grant money from government
- Carriageway resurfacing
- Non-statutory maintenance

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 (56.00%).

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 never be repaired (29.17%) or will be prepared in more than 2 years (29.17%).

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

Answers to this section included:

- Applications of AI
- Warm mix asphalt
- New plant to alleviate HAVS impacts on excavation by staff
- Cold lay materials
- Better programming of available man hours
- New techniques and machinery for filling potholes
- Spray injection patching
- Carbon negative asphalt surfacing material
- Robotiz3D (identification of carriageway condition and faults by laser technology and cameras)
- Preservation treatments
- Vaisala Asset Management
- Small asphalt recycler mounted on a small LGV

7 APSE Comment

Highways 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 this is now showing signs of failure especially on 'C' and minor roads.

50% of councils saw a decline in budgets over the previous year. £8 billion of additional money from central Government has been promised for potholes from the savings from the HS2 rail scheme phased over several years. The recent ALARM survey suggested a requirement for £14 billion and 11 years to complete. Therefore, whilst it may have a beneficial impact, if the promised monies do filter through eventually, there is still a shortfall in funding. The right level of funding would allow a more planned approach.

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.

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Sign up for APSE membership to enjoy a whole range of benefits

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 are an excellent way to network 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:

- Building Cleaning and Facilities Management
- Education Catering
- Cemeteries and Crematoria
- Climate Change and Renewables Network
- Housing, Construction and Building Maintenance
- Commercialisation, Income and Trading Network
- Parks, Horticulture and Grounds Maintenance
- Highways and Street Lighting
- Sports and Leisure Management
- Fleet, Transport and Vehicle Maintenance
- Waste Management, Refuse Collection and Street Cleansing

Visit www.apse.org.uk for more details.



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