



association for public service excellence

State of the Market 2023

Transport



Briefing 23/59

December 2023

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State of the Market 2023

Transport

The state of the market survey was conducted by Rob Bailey, APSE Principal Advisor for Transport. 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

Vehicles

% utilising Vehicle Tracking Systems	84.62%
% with an active policy against the purchase of internal combustion powered vehicles	20.83%

Workload

% expecting the workload of the transport section to increase over the next 12 months	65.22%
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Budget

% whose Fleet service budget has decreased from the last financial year	12.50%
% whose Fleet maintenance training budget has decreased over the past 12 months	4.17%

Staffing

% offering a salary sacrifice scheme for vehicles for employees	45.83%
% who personally feel staff absence levels are not at an acceptable level	66.67%
% who run an apprenticeship scheme	79.17%
Average age of operational workforce	46.6 years
Average basic hourly rate of fitters	£17.49
% who are having trouble recruiting operatives	33.33%
% who are having trouble recruiting technical staff	91.67%
% who are having trouble recruiting managerial staff	16.67%

% adding additional electrical supply capacity to charge Electric Vehicles in 1 or 2 years

44.00%

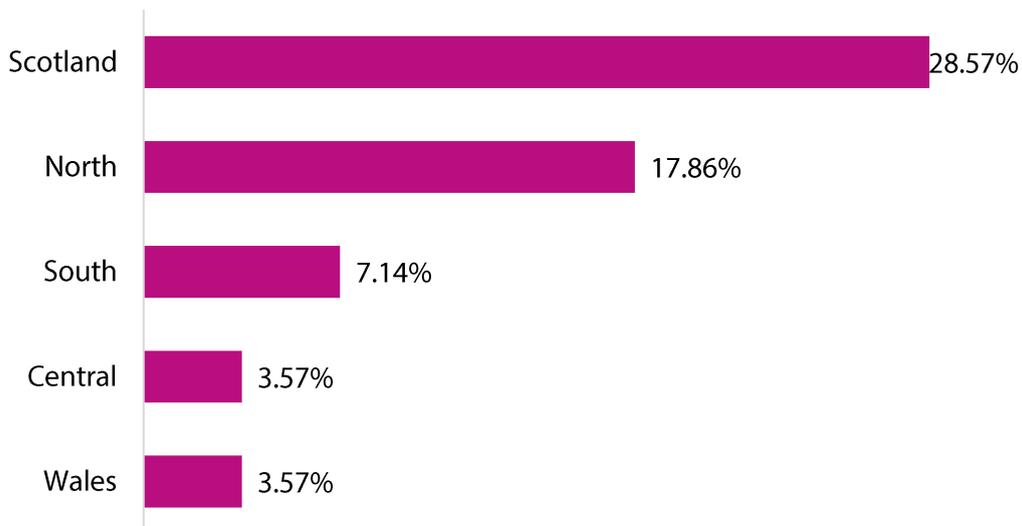
1 Introduction

APSE conducted an online survey during the late summer / Autumn 2023. 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.

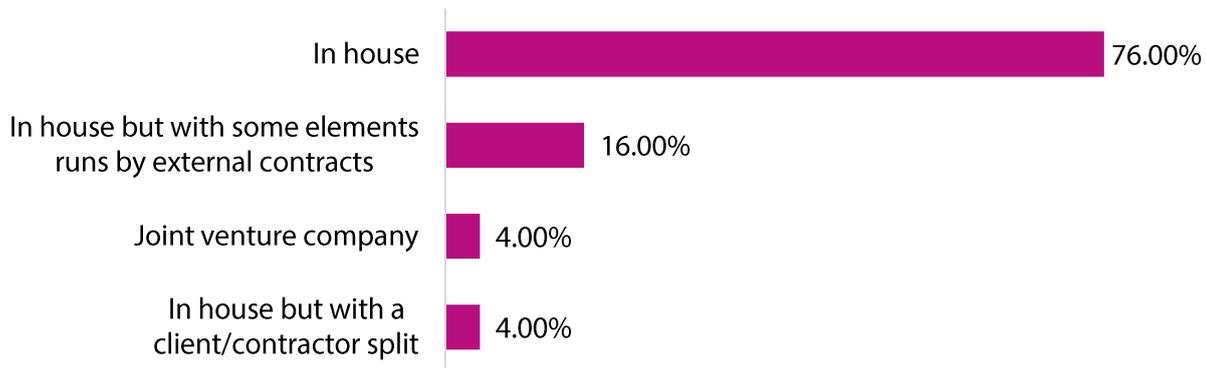
None of the questions were mandatory, so the total amount of responses differs from question to question. Individual details of respondents have been kept confidential. Results of the survey should be treated as a snapshot of current opinions of those working in transport services rather than a thorough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

Where in the UK do you work?



2 The Service

How are your Fleet services currently delivered?



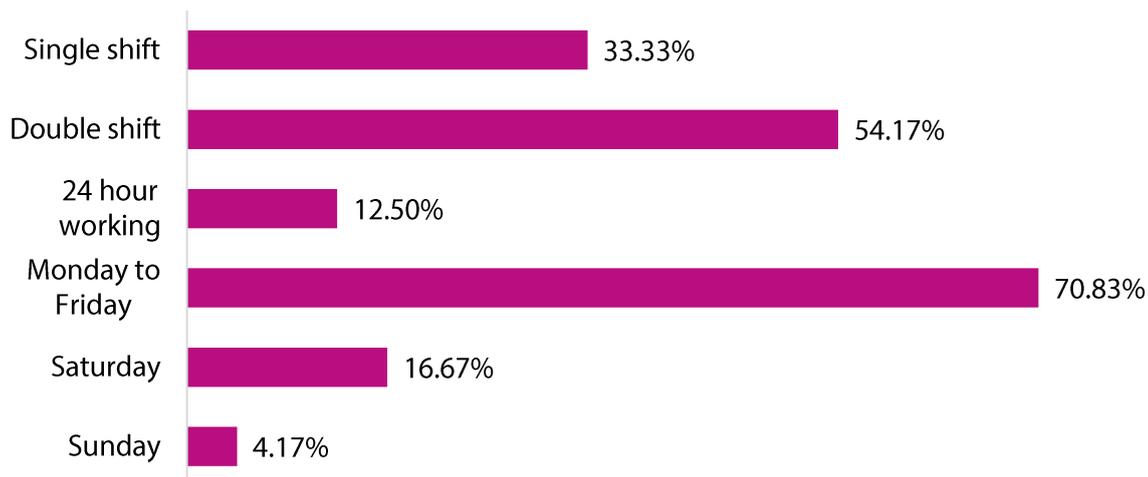
76.00% of Fleet services are delivered in-house, 16.00% are delivered in house but with some elements run by external contracts, 4.00% are delivered via a joint venture company and 4.00% are in house but with a client/contractor split.

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



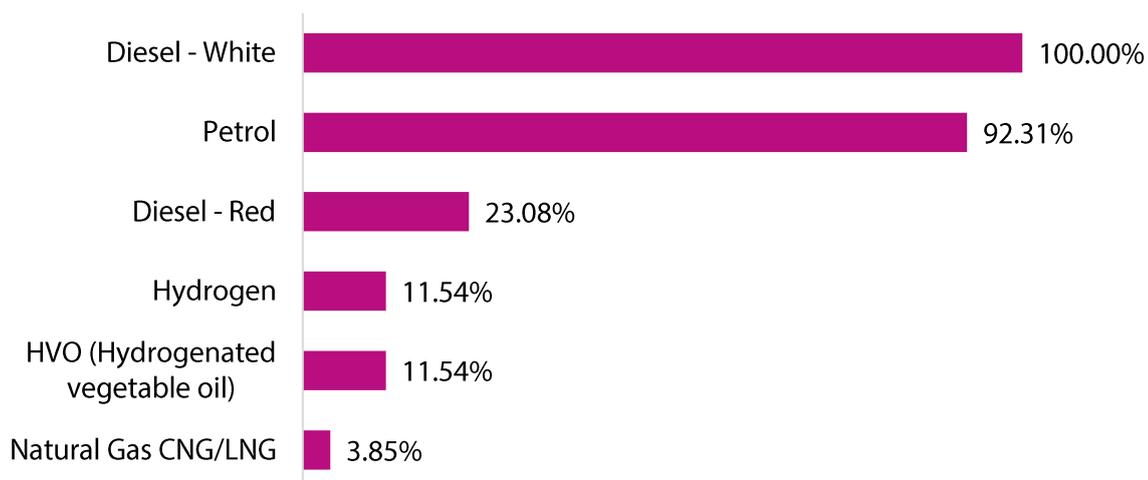
100.00% of those who currently provided in-house services expect them to remain in-house over the next 12 months.

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



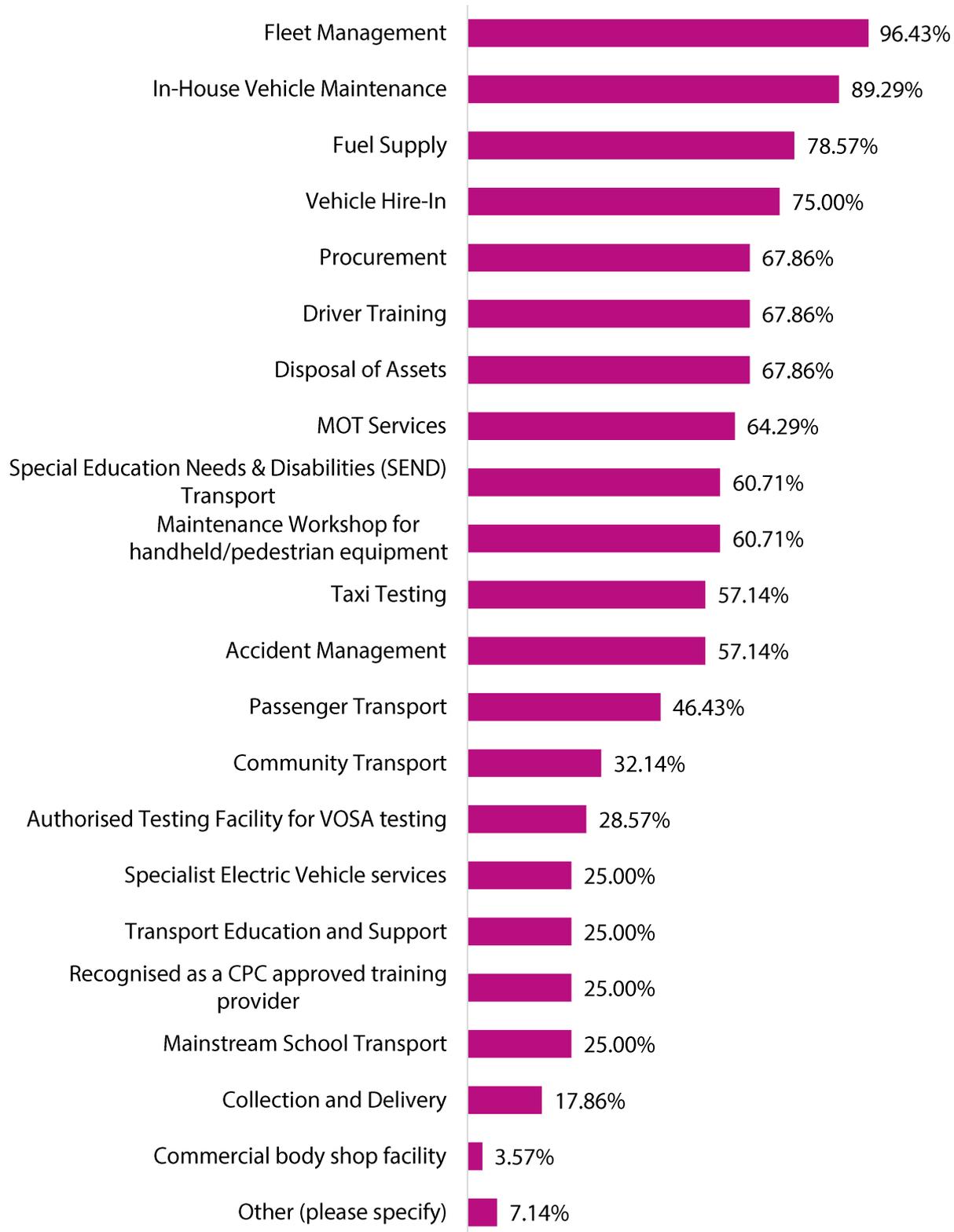
Most respondents operate a Monday to Friday shift system for the maintenance garage (70.83%) with 16.67% open on a Saturday and 4.17% open on a Sunday. 33.33% use single shifts, 54.17% use double shifts and 12.50% have 24 hour working.

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



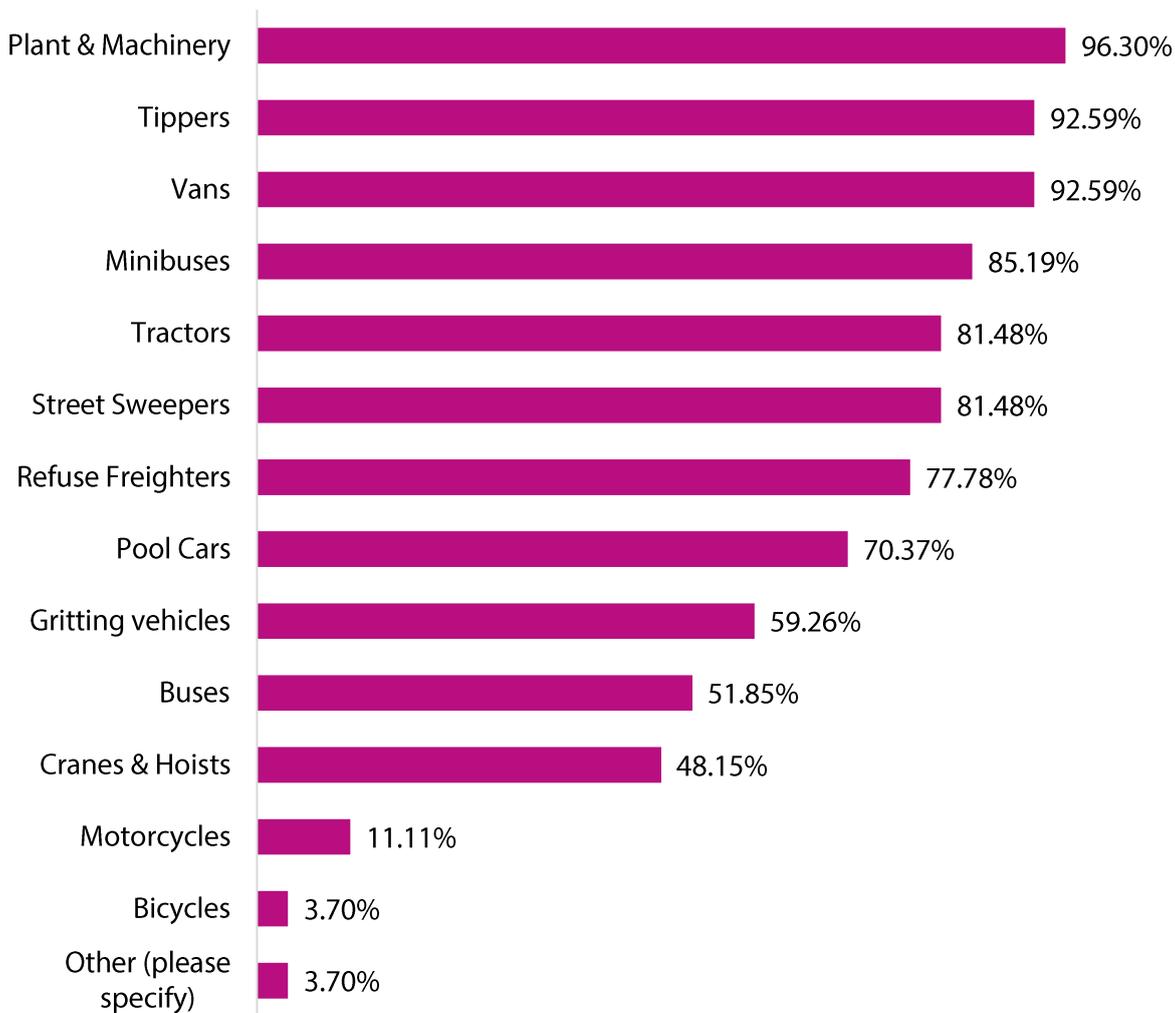
All respondents reported using white diesel with 92.31% using petrol. Other fuels used included red diesel (23.08%), hydrogen (11.54%), HVO (11.54%) and natural gas CNG/LNG (3.85%).

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. Other responses included community meals delivery and a commercial maintenance and repair facility.

Which types of vehicle do you maintain?



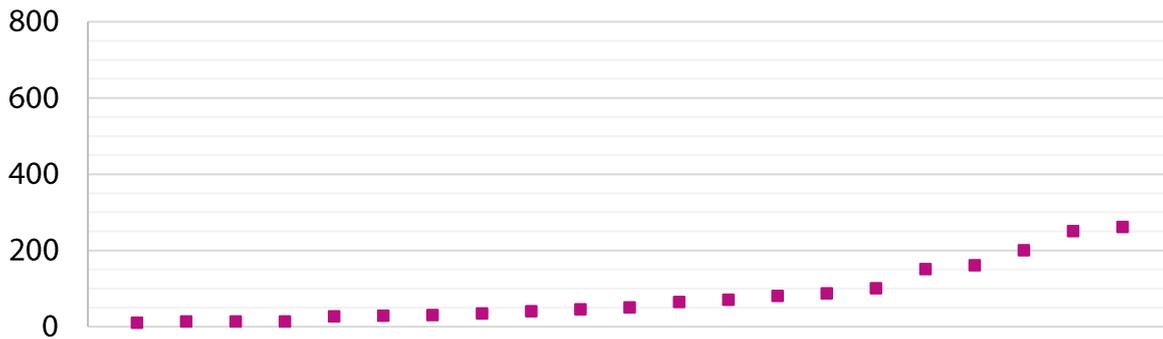
The table above shows the range of vehicle types maintained by responding councils. Other vehicle types mentioned by respondents included police LGVs.

Do you utilise Vehicle Tracking Systems?



84.62% of respondents do utilise Vehicle Tracking Systems.

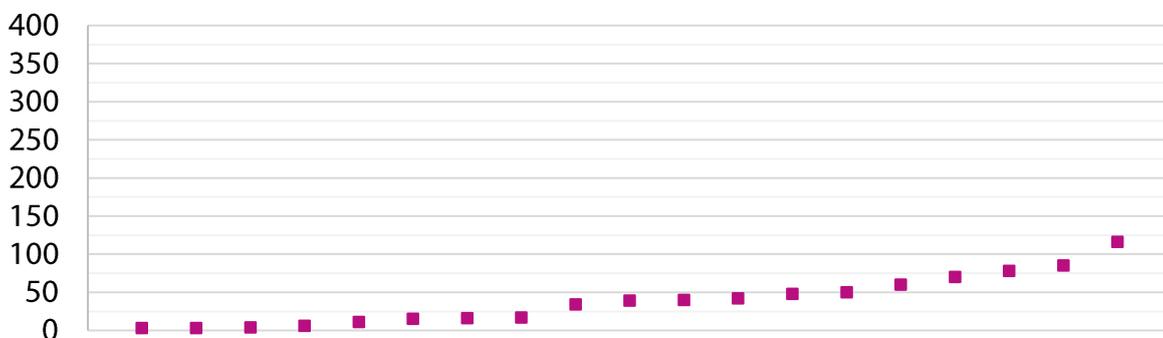
How many vehicles are fitted with video recording systems?



Respondents reported having anywhere from 10 vehicles up to 750 vehicles, with a median of 57.

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 3 and 400.

Hybrid vehicles

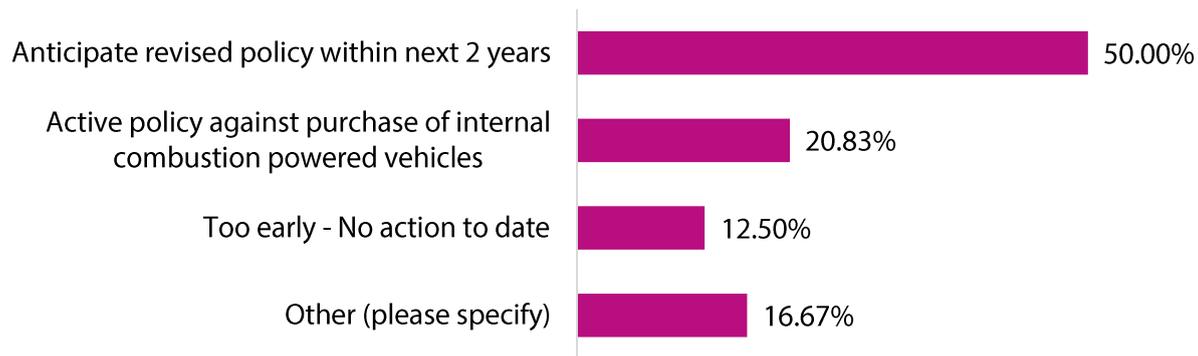


The number of hybrid vehicles owned by each respondent to the survey is shown in the graph above, with respondents owning between 2 and 77.

LPG: No survey respondents had LPG vehicles.

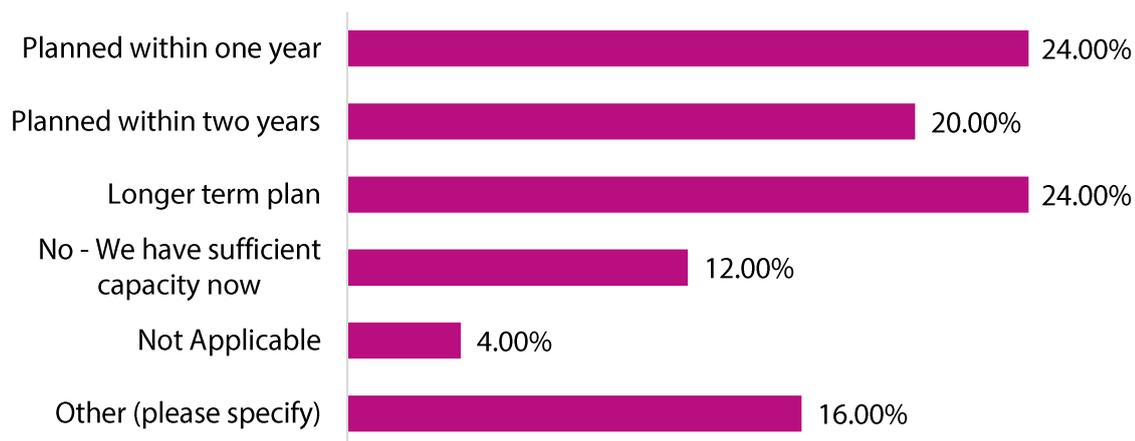
Hydrogen cell: Responding authorities had between 1 and 4 hydrogen cell vehicles.

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?



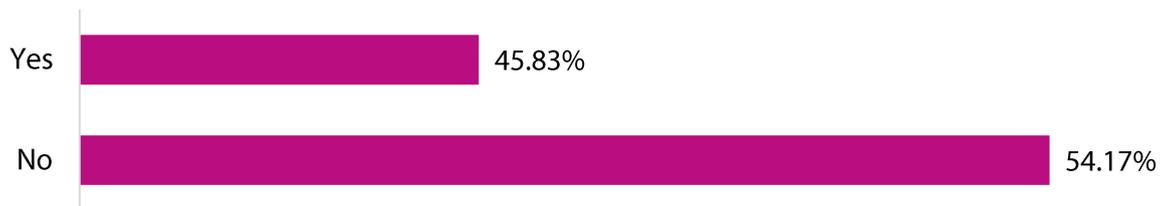
50.00% anticipate that they will have a revised policy within the next 2 years, 20.83% have an active policy against the purchase of internal combustion powered vehicles and 12.50% of respondents have not taken any action to date. Other responses included that one authority has already begun purchasing electric vehicles with a fluid approach to contain this, and another authority's electrification of their fleet has been delayed due to a lack of depot space for charging.

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



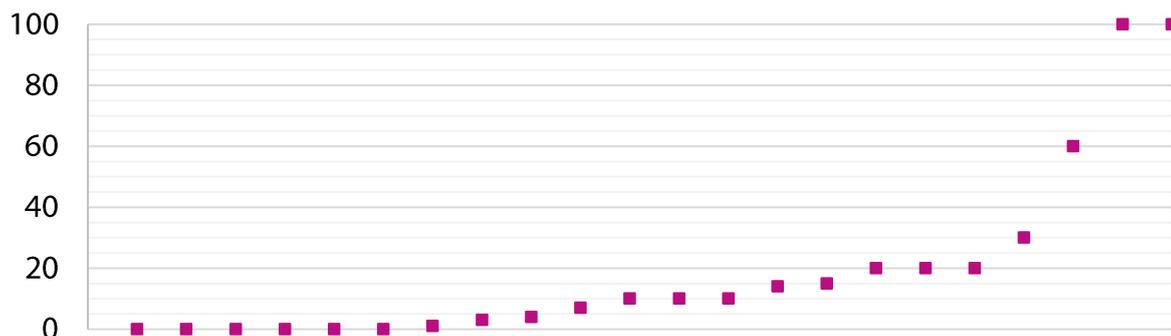
24.00% of respondents are planning to add additional electrical supply capacity to charge electric vehicles within one year, and 20.00% within two years. 24.00% have a longer-term plan for this and 12.00% have sufficient capacity now. Other responses included that one authority has actively been undertaking this since 2016, and another has to put charging points for larger vehicles in.

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



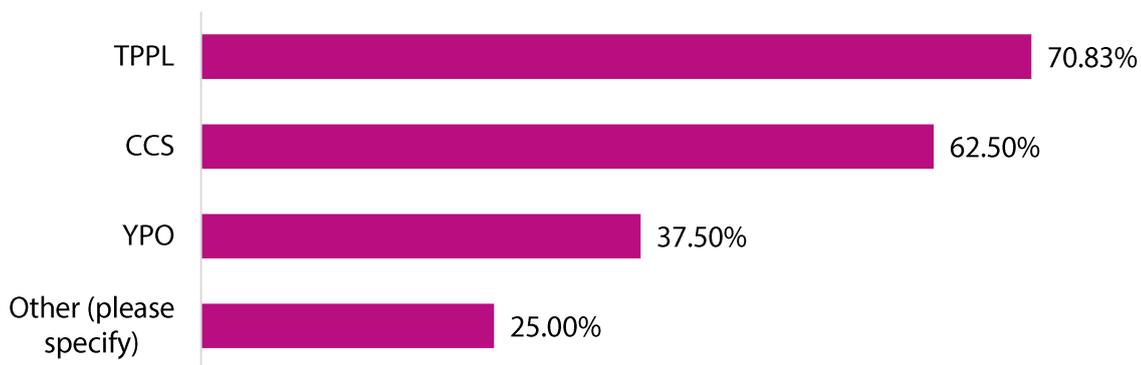
The majority of respondents do not offer a salary sacrifice scheme for vehicles for employees (54.17%), although a significant proportion of responding councils do offer a scheme (45.83%).

How many pool cars do you operate for internal use?



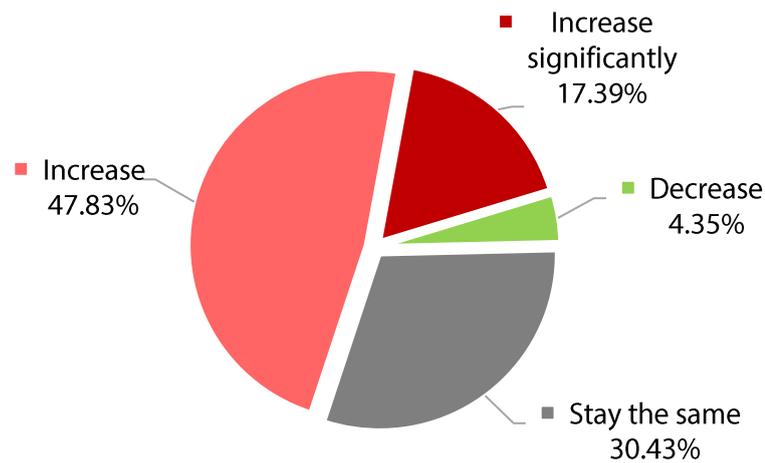
Respondents owned between 1 and 100 pool cars.

Do you use a Vehicle Procurement Framework?



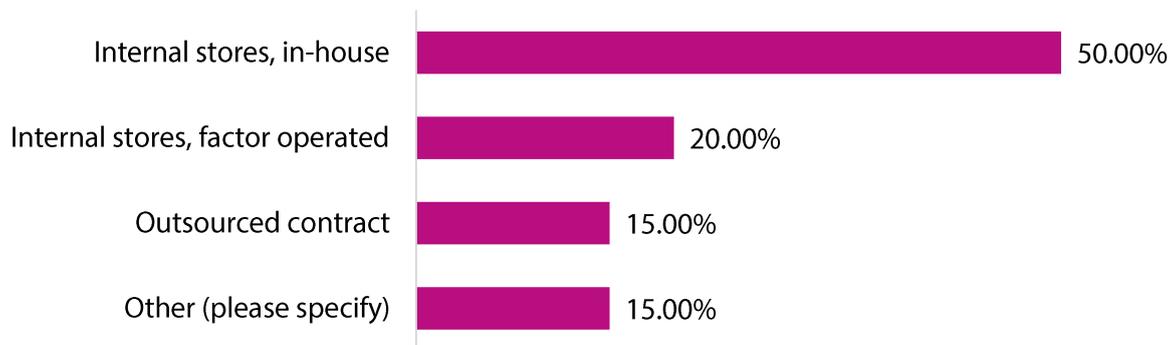
The most popular Vehicle Procurement Framework used by respondents was TPPL (70.83%), CCS (62.50%) and YPO (37.50%). Respondents also reported using Halton Housing, Scotland Excel and Yortender.

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



47.83% of respondents expect the workload of the transport section to increase, 17.39% expect it to increase significantly and 4.35% expect this to decrease. 30.43% expect it to stay the same.

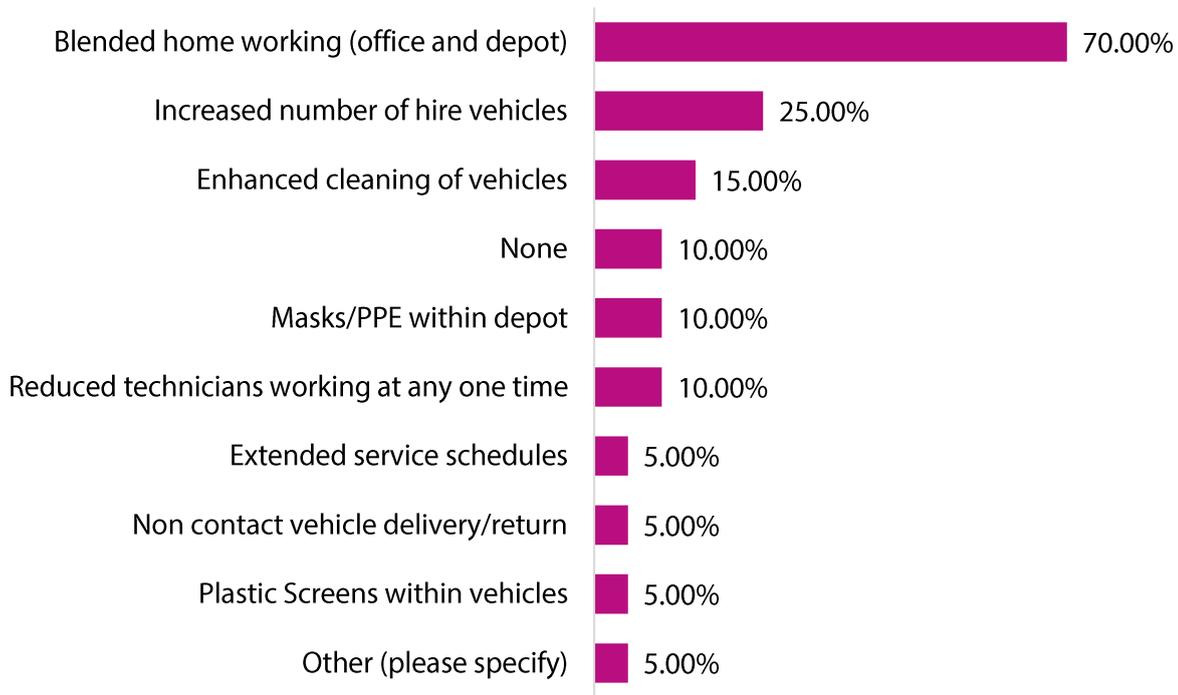
How do you operate your spares system?



50.00% of respondents use internal in-house stores, 20.00% are factor operated and 15.00% have an outsourced contract. Other responses included that:

- they have some imprest stock and spares in-house and others are delivered from source
- their internal stores are part managed in-house and part factor operated
- they have an internal store and are moving to a larger factor involvement

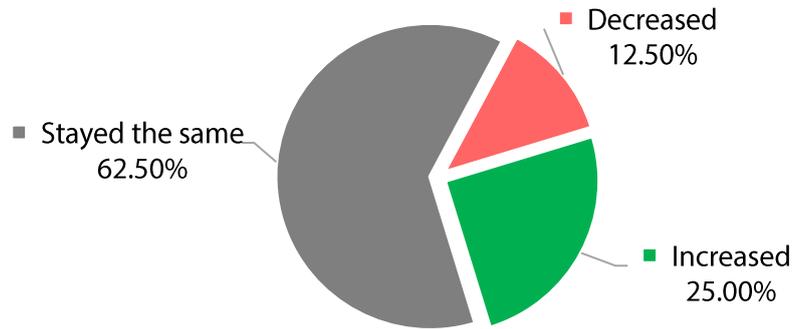
**What changes (if any) have been retained that were originally implemented as a response to Covid-19?
(please tick all that apply)**



The majority of respondents have retained blended home working (70.00%). Others have retained increased numbers of hire vehicles (25.00%), enhanced cleaning of vehicles (15.00%), masks and PPE within the depot (10.00%) and reduced technicians working at any one time (10.00%). 10.00% have retained none of the changes that were originally implemented as a response to COVID-19/

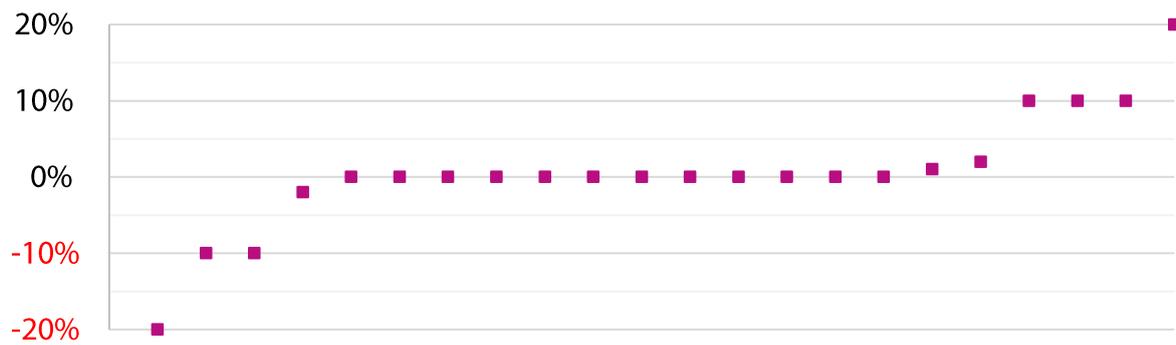
3 Budget

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



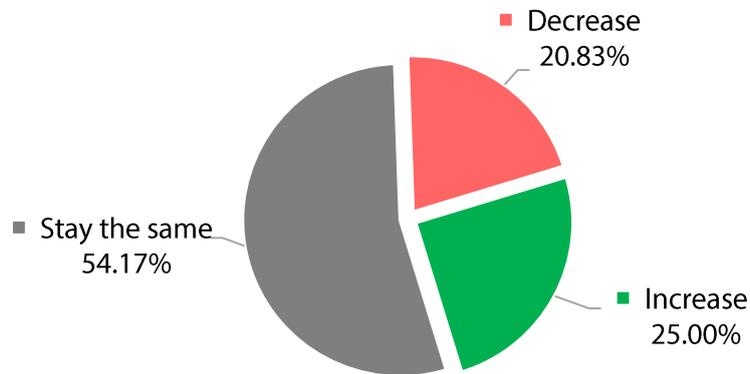
For the majority of respondents, the budget has stayed the same as the last financial year (62.50%). 25.00% said that it had increased and 12.50% said it had decreased. Some respondents noted that staying the same budget is a relative decrease due to the increases in supply chain costs.

How much has your budget changed over the last year?



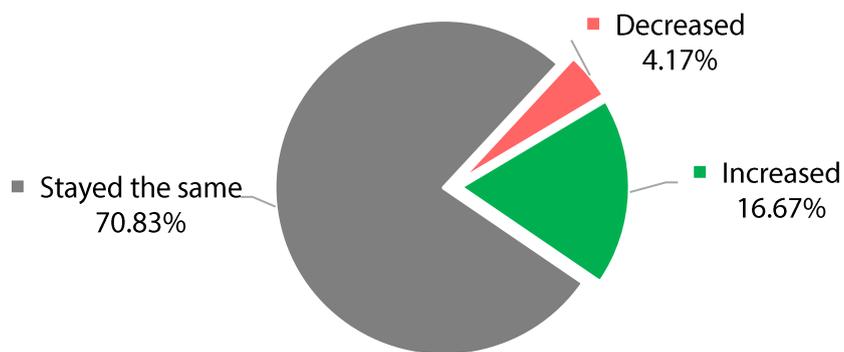
Responses varied from being reduced by 20% to being increased by 20%.

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



54.17% expect the budget for the next financial year to stay the same, 25.00% expect it to increase and 20.83% expect it to decrease.

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

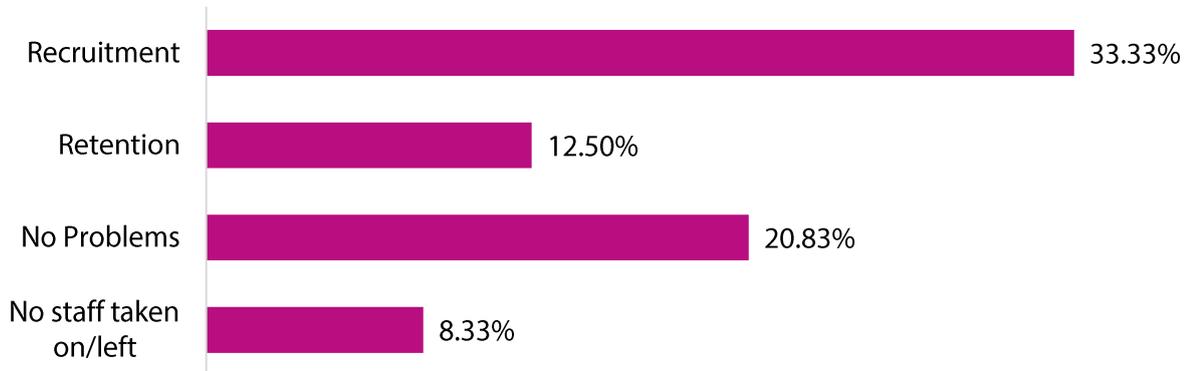


Over the past 12 months, most of the respondents' fleet maintenance training budget had stayed the same 70.83%, with 16.67% experiencing an increase and 4.17% experiencing a decrease.

4 Staffing

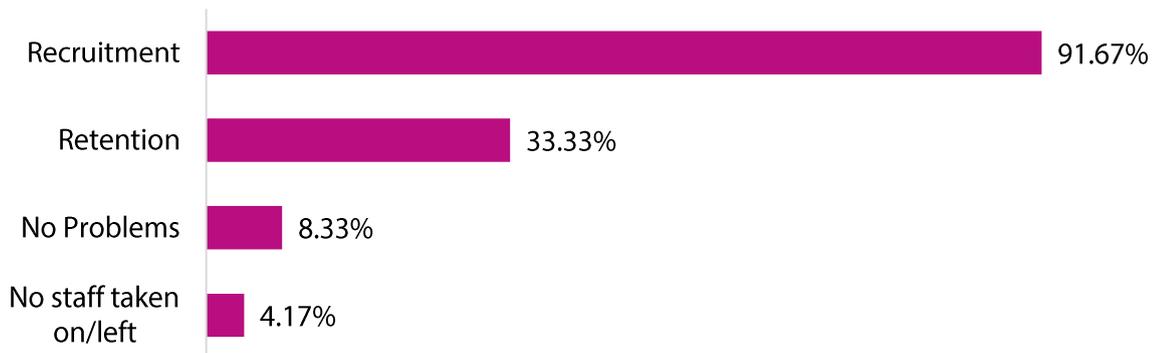
Are you having trouble recruiting or retaining staff? (over the past 12 months)

Operatives



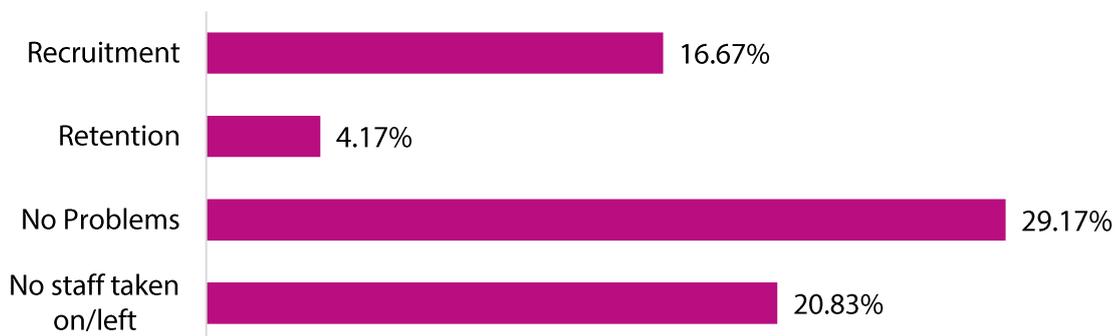
33.33% had trouble recruiting and 12.50% reported having trouble retaining operatives.

Technical Staff



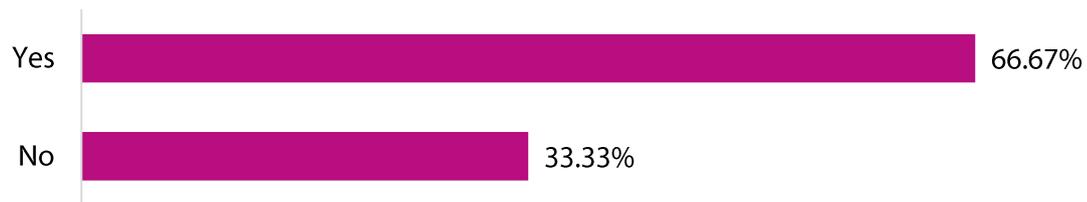
In terms of technical staff, most reported having trouble recruiting (91.67%) and some had issues retaining staff (33.33%).

Managerial Staff



16.67% had trouble recruiting managerial staff and very few had any problems retaining staff (4.17%). Respondents stated that salary disparity with the private sector was a large barrier to recruitment during the ongoing cost of living crisis.

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 (66.67%), a large portion of respondents disagreed with this statement (33.33%).

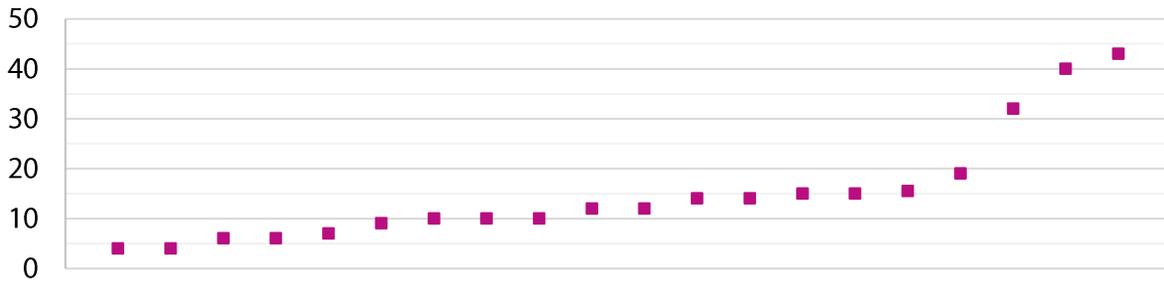
Do you run an apprenticeship scheme?



79.17% of respondents do run an apprenticeship scheme with between 1 and 6 apprentices currently on the scheme.

Approximately how many staff do you employ within fleet operations?

Maintenance Fitters



Across responding authorities, the number of maintenance fitters varied considerably from 4 up to 44.

Managerial



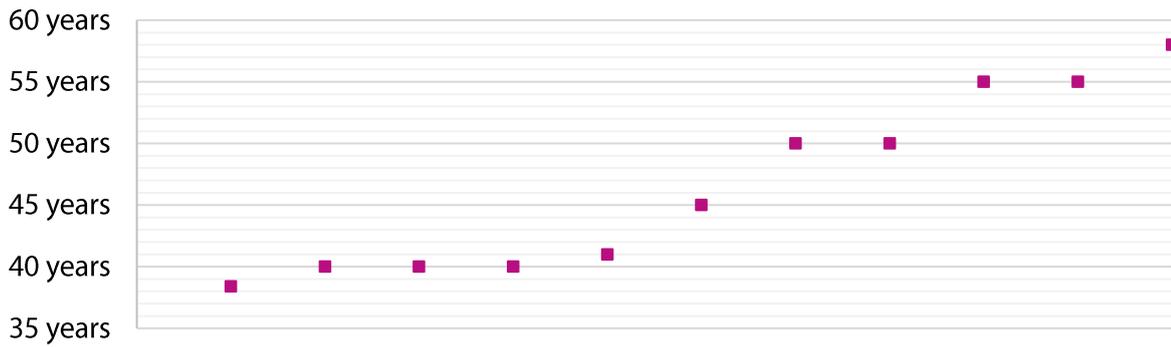
The variance in numbers of managerial staff was from 1 to 7 members of staff.

SEN Transport Administration (excluding drivers and escorts)



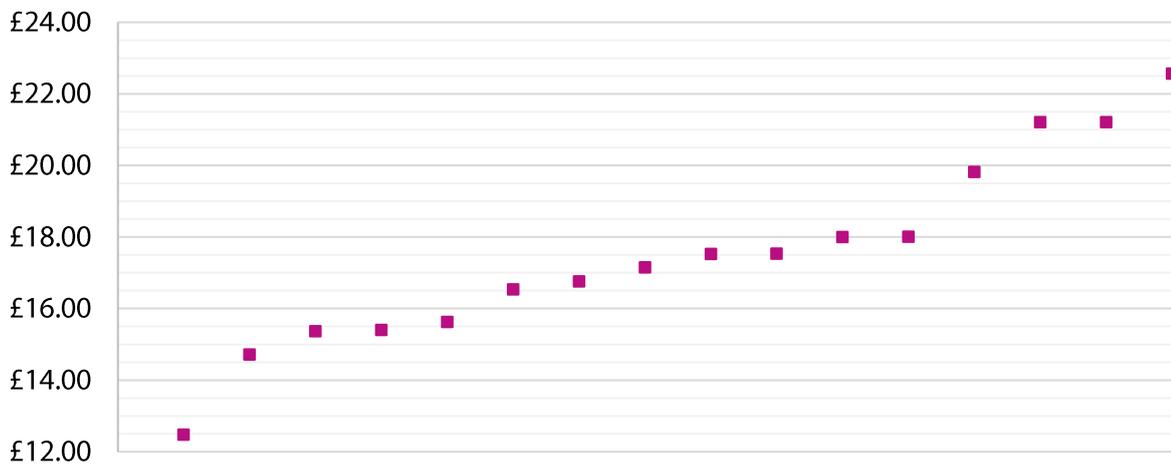
The number of SEN Transport Administration staff per authority ranged from 1 to 20.

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 58 years. Across all respondents, the average age was 46.6 years.

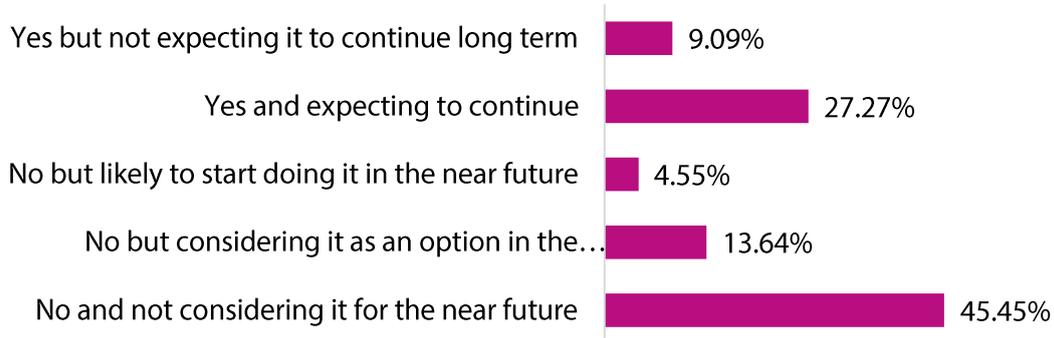
What is the basic hourly rate of pay for your fitters?



The basic hourly rate of pay for fitters ranged from £12.47 to £22.56, with an average of £17.49.

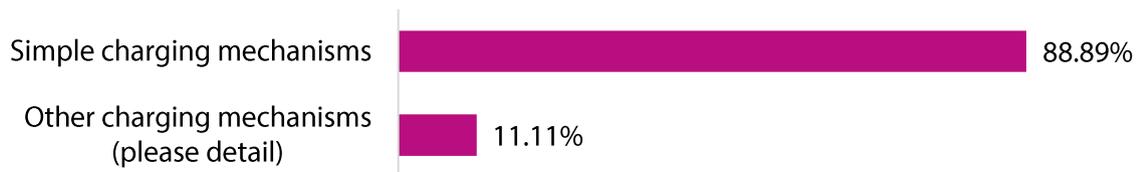
5 Areas of growth and decline

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



27.27% are currently selling services to organisations external to the council and expecting to continue, with 9.09% not expecting to continue long term. 4.55% are likely to start in the near future and 13.64% are considering this as an option in the near future. 45.45% are not selling services and not considering it for the near future.

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



Most respondents use simple charging mechanisms (88.89%). One of the responding councils has contract lease vehicles serviced in-house and recharged.

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

Growth areas identified by responding councils include:

- More maintenance for ageing fleet
- Electric vehicle servicing
- Small plant
- School transport contracts
- MOT testing
- Specialist welding services
- External work
- Tachograph calibration

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

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

- Diesel and petrol servicing
- Ad-hoc clients
- Servicing in general due to electric vehicles
- Non-ATF MOTs

6 APSE Comment

Local authority fleets are moving towards fulfilling their commitment to net-zero. Many now own significant numbers of electric vehicles and are experimenting with hydrogen alternatives. Skill shortages beset the industry with the workforce now averaging 46 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.

The main recent change has been a scaling back of National commitments to cease petrol and diesel powered car sales from 2030. It has become increasingly clear that the finance, infrastructure and vehicle technology is not advanced enough to meet the challenge within the original timescales. HGV's especially are often ill-suited to current battery technology and may well transition to hydrogen. The use of Hydro-treated Vegetable Oil (HVO) is proving controversial with some authorities choosing not to use it, though some have successfully implemented changes to HVO but with the use of ethical procurement policies.

Local authorities will need to reskill some of their workforce, but the timescales are now less onerous, allowing extra time to recruit and train apprentices and fitters.

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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

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