



association for public service excellence

State of the Market 2023

Winter Maintenance



Briefing 23/60

December 2023

Table of Contents

| | |
|--------------------------|----|
| Results at a glance..... | 3 |
| 1 Introduction | 4 |
| 2 The Service..... | 5 |
| 3 Budget | 7 |
| 4 Severe Weather | 9 |
| 5 Salting..... | 10 |
| 6 Opinions..... | 13 |
| 7 APSE Comment..... | 14 |

State of the Market 2023

Winter Maintenance

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.

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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

The service

| | |
|---|--------|
| % expecting the service to remain in-house over the next 12 months | 95.12% |
| % currently selling services to organisations external to the council | 31.11% |
| % with a snow warden scheme (or similar) in place | 25.00% |

Budget

| | |
|--|--------|
| % of respondents whose budget has stayed the same from the previous financial year | 67.57% |
| % of respondents who had to overspend on their 2022-23 winter maintenance budget | 66.67% |
| % of respondents who underspent on their 2022-23 winter maintenance budget | 22.22% |
| % whose dedicated training budget had stayed the same | 28.57% |

Salting

| | |
|---|---------|
| % whose salt orders were met in full by suppliers to cover last winter's maintenance operations | 100.00% |
| % reviewing gritting / salt routes after the severe weather over the recent years | 72.41% |
| % purchasing salt supplies jointly with other authorities | 15.15% |

Footways

| | |
|--|--------|
| % salting footways as a precautionary measure following forecast | 38.89% |
| % not salting footways | 0.00% |
| % who had salted 75-100% of necessary footway salting | 33.33% |

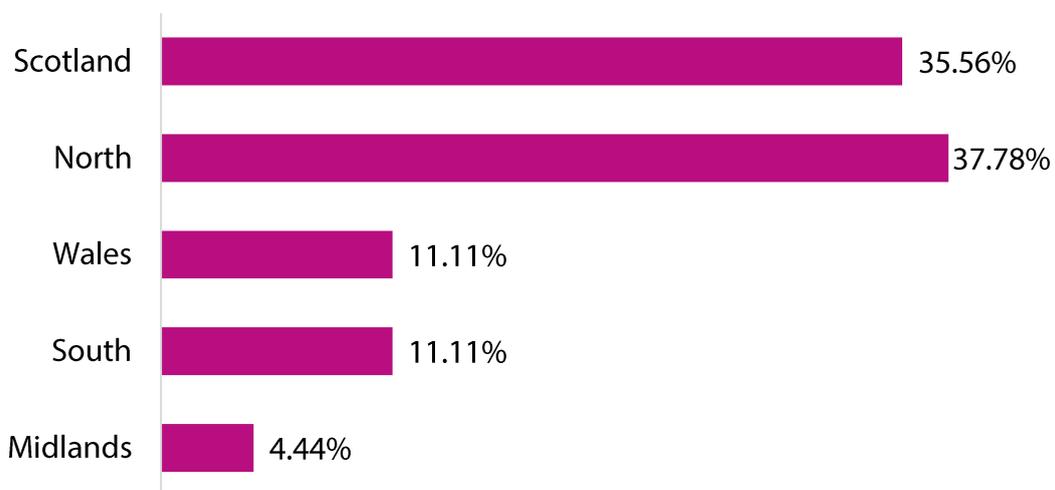
1 Introduction

APSE conducted an online survey during the Summer / Autumn 2023. 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.

There were 45 responses from local authorities to this survey. 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.

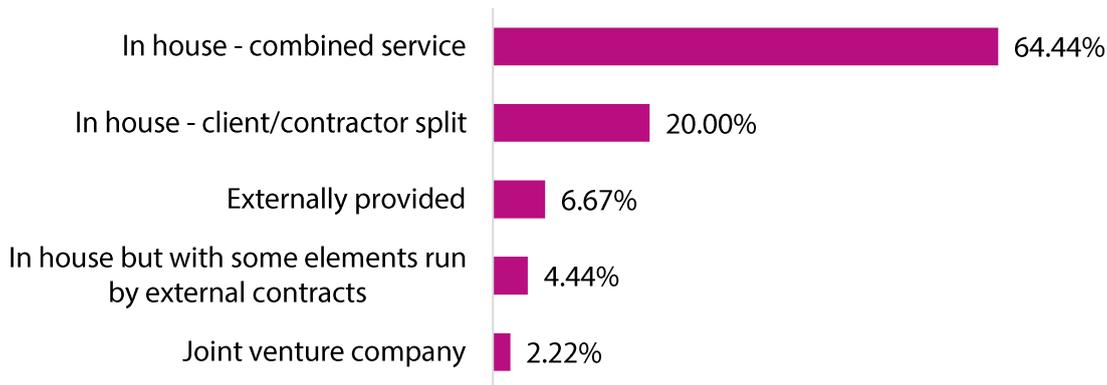
Where in the UK do you work?



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

2 The Service

How are your winter maintenance services currently delivered?



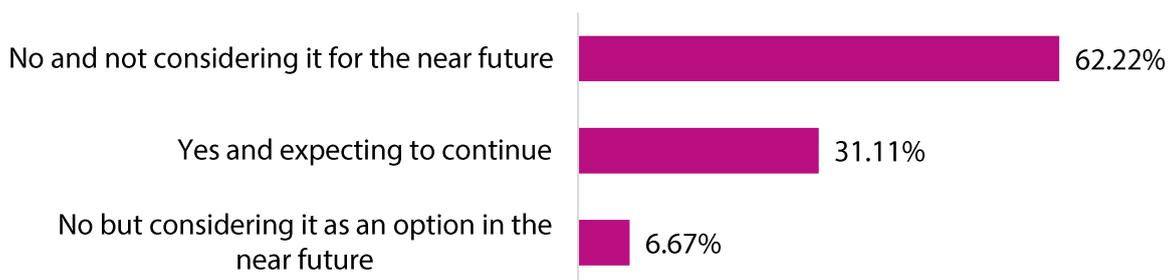
Most respondents have an in-house combined service (64.44%). 20.00% have an in-house client/contractor split, 4.44% have an in-house service but with some elements run by external contracts, 6.67% have externally provided services and 2.22% have a joint venture company.

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



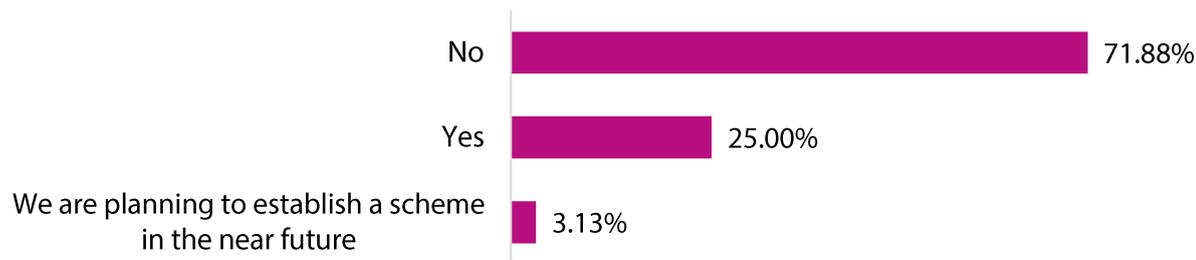
The majority of respondents expect the service to remain in-house over the next 12 months (95.12%).

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



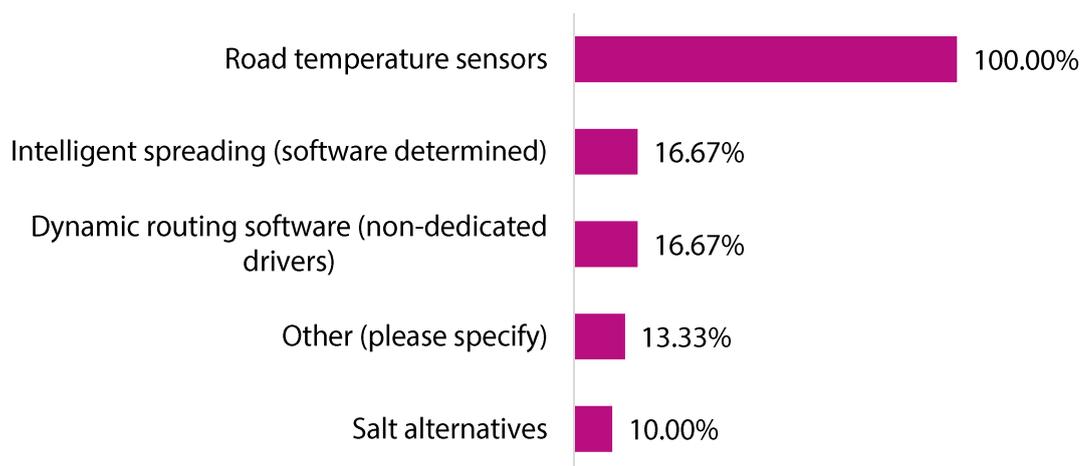
62.22% do not currently sell services to organisations external to the council and are not considering it for the near future, 6.67% are considering it as an option. 31.11% are doing so and are expecting to continue.

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



25.00% have a snow warden or similar scheme in place and 3.13% are planning to establish a scheme in the near future.

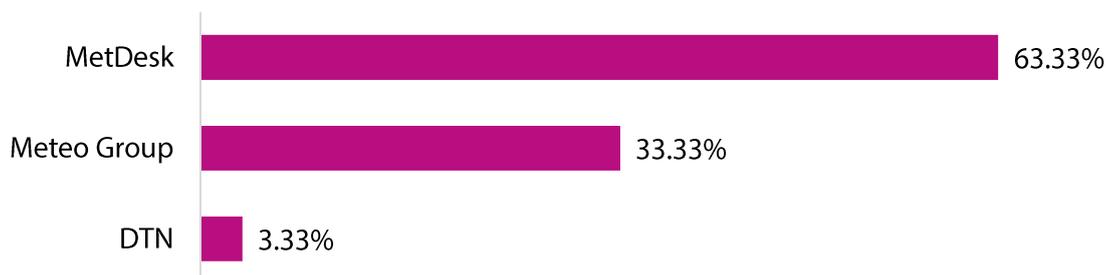
What technology do you use to assist the service? (please tick all that apply)



100.00% use road temperature sensors, 16.67% use intelligent spreading, 16.67% use dynamic routing software and 10.00% use salt alternatives. Other responses included: route based forecasting, auto salting for primary and secondary routes, in-cab route navigation and optimized routing.

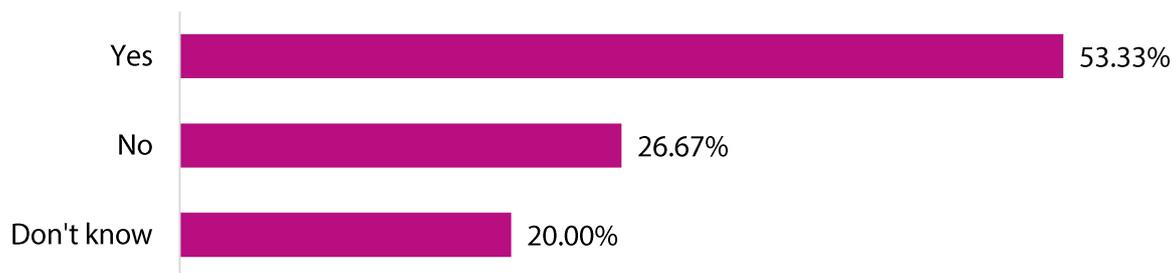
Do you use a weather forecasting service? (If so, which one?)

Among the respondents that use weather forecasting services, 63.33% use MetDesk, 33.33% use Meteo Group and 3.33% use DTN.



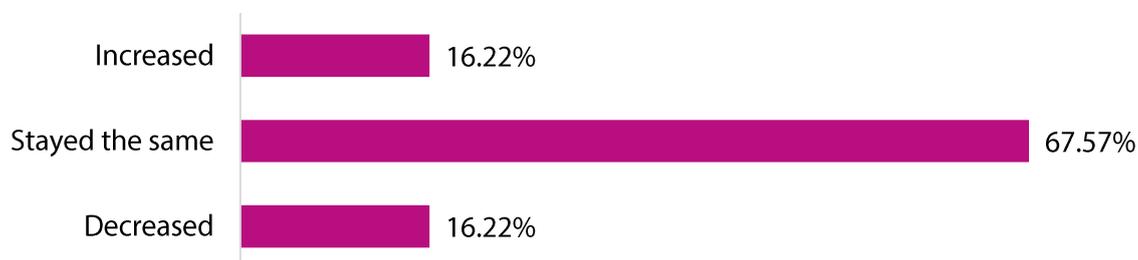
Has your authority declared a climate emergency?

53.33% of respondent's authorities have declared a climate emergency.



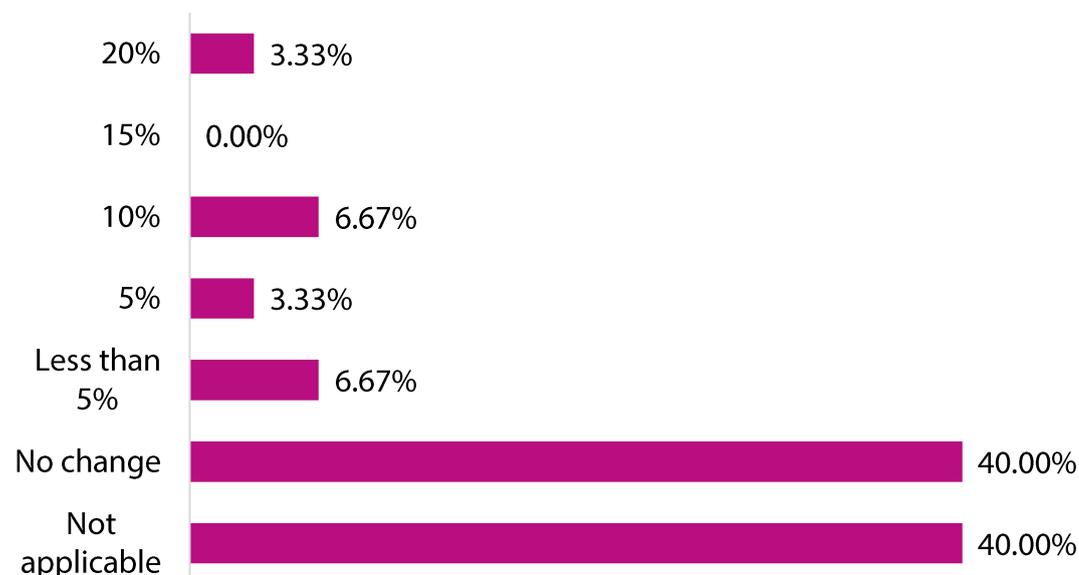
3 Budget

How has the budget for the winter maintenance service changed from the previous financial year?



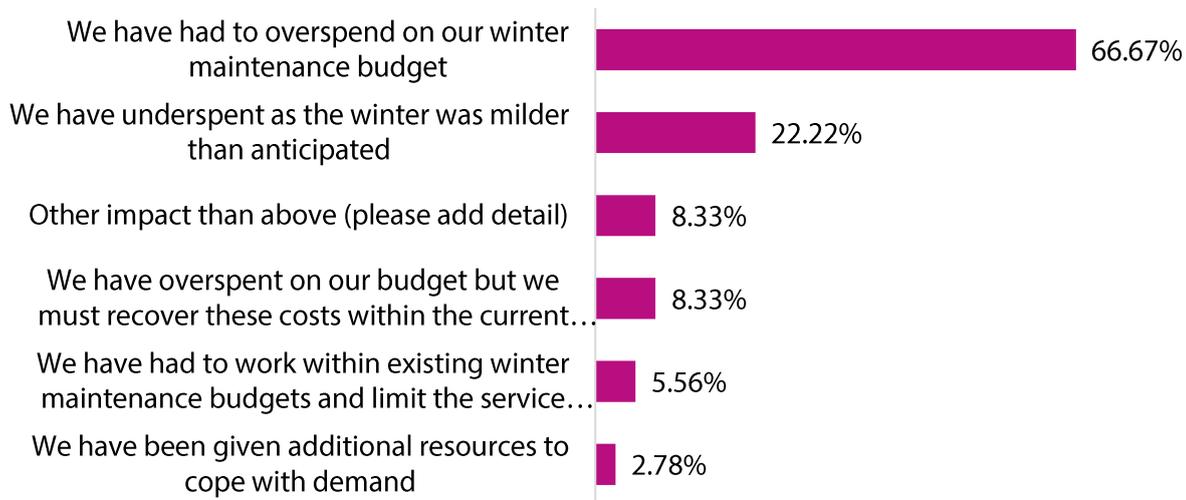
Most respondents indicated that their winter maintenance service budget has stayed the same (67.57%), 16.22% said it has increased and 16.22% said it has decreased.

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



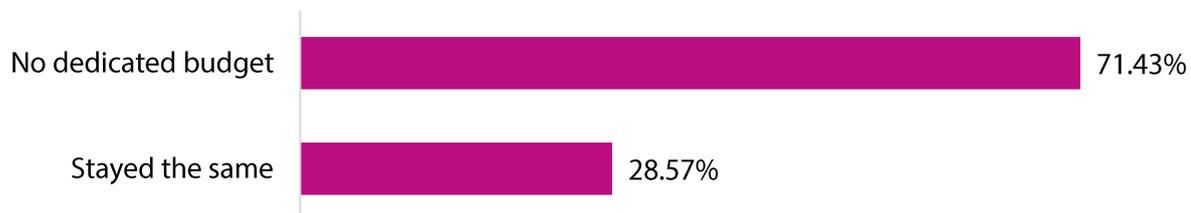
The majority of respondents' budgets have decreased by less than 5% or 10% (6.67%), though most survey respondents had not experienced budget decreases.

With reference to the weather during the winter 2022-2023, what has been the impact on your winter maintenance budget?



The majority of respondents had to overspend on their winter maintenance budget (66.67%), with 22.22% underspending as the winter was milder than anticipated. Other impacts detailed in the comments section included that there was a greater impact on their highway safety defects budget due to a substantial increase in defects following the winter months, and that there was no impact as their service is provided as a lump sum payment.

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



Most respondents either had no dedicated budget (71.43%) or their budget stayed the same (28.57%).

4 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:

- Driver recruitment
- More operatives trained for emergency conditions
- Increased salt stockpile
- Routes have been optimised
- Liquid de-icer use on footways
- Increased secondary network treatments
- Severe weather desk arrangements
- Increased number of grit bins
- Online winter gritting story map for residents
- Winter actions posted on social media
- Introduced a snow plan and framework for external resources
- Additional sensors have been placed
- Reduced the number of routes
- Expansion of footpath gritting network

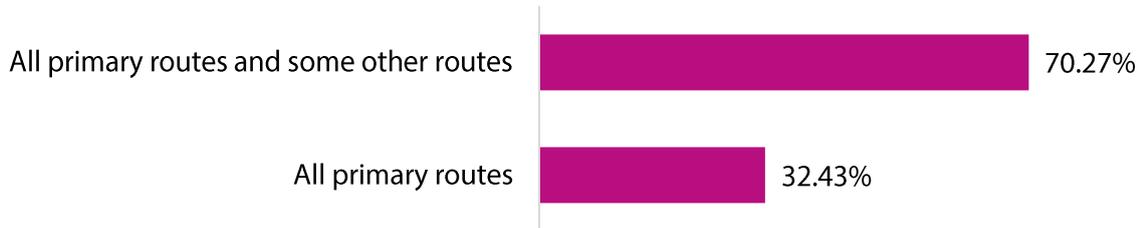
Has the severe weather over the recent years led to any of the following (you may answer more than one)?



The severe weather has led 72.41% to review gritting / salt routes, and 41.38% have encouraged others to help clear snow (e.g. local people, parish councils, farmers). 34.48% have also increased flood prevention measures and improved flood information.

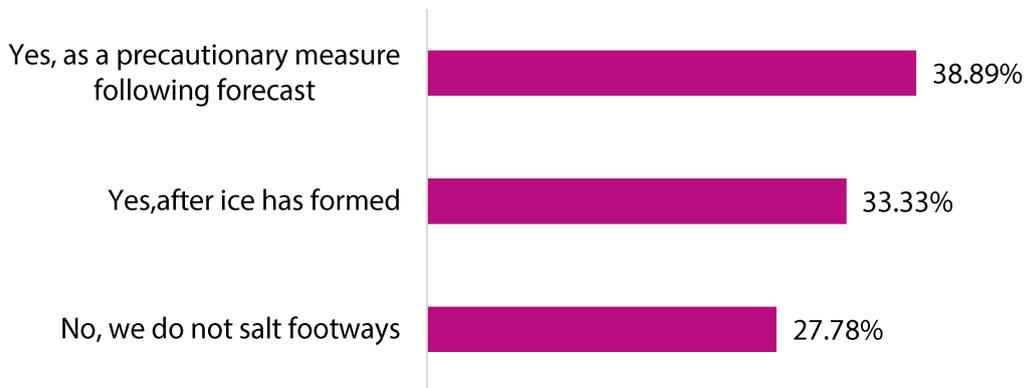
5 Salting

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



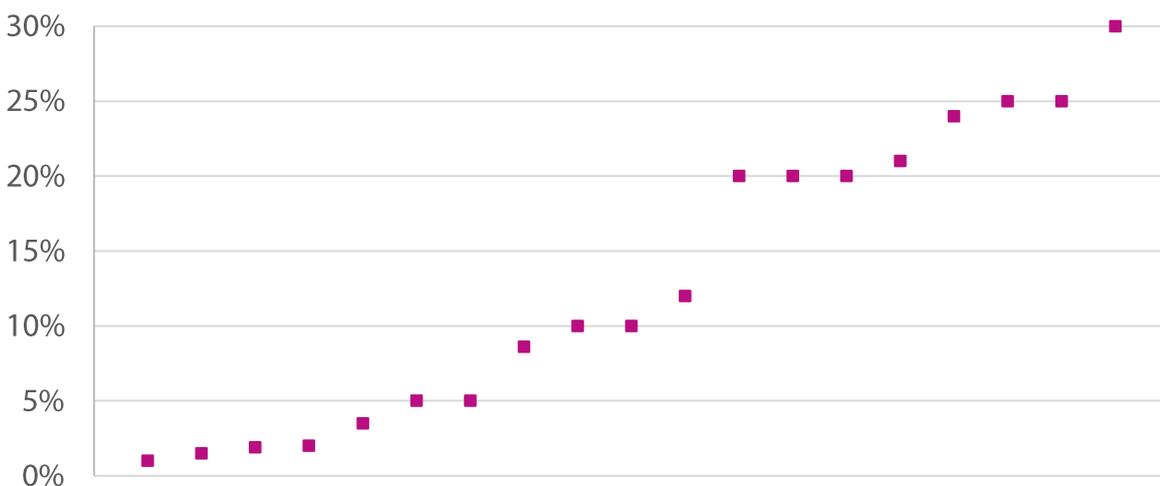
70.27% of respondents salt all primary routes and some other routes, and 32.43% salt only all primary routes.

Do you salt footways?



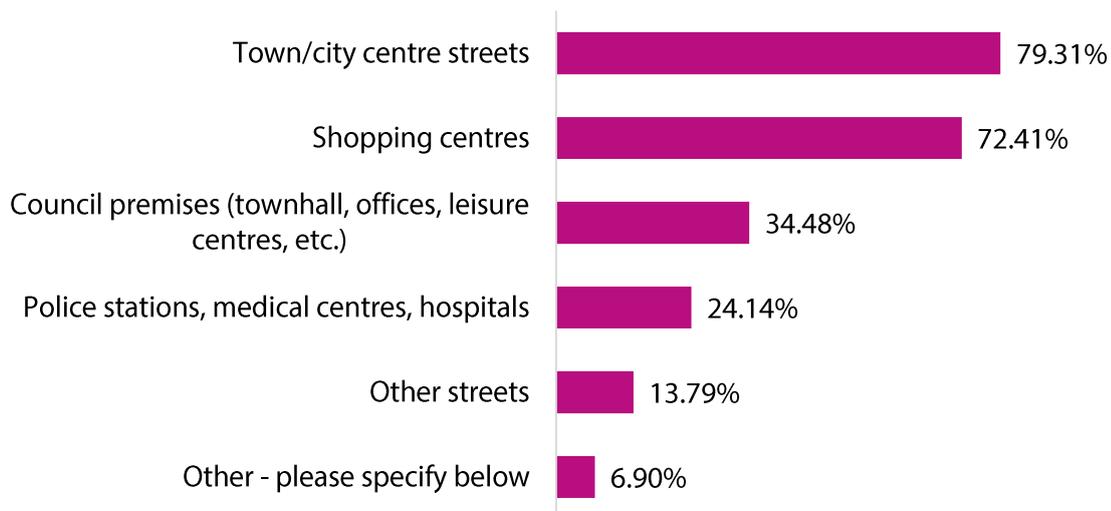
38.89% salt footways as a precautionary measure following forecast, 33.33% do after the ice has formed and 27.78% do not salt footways.

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



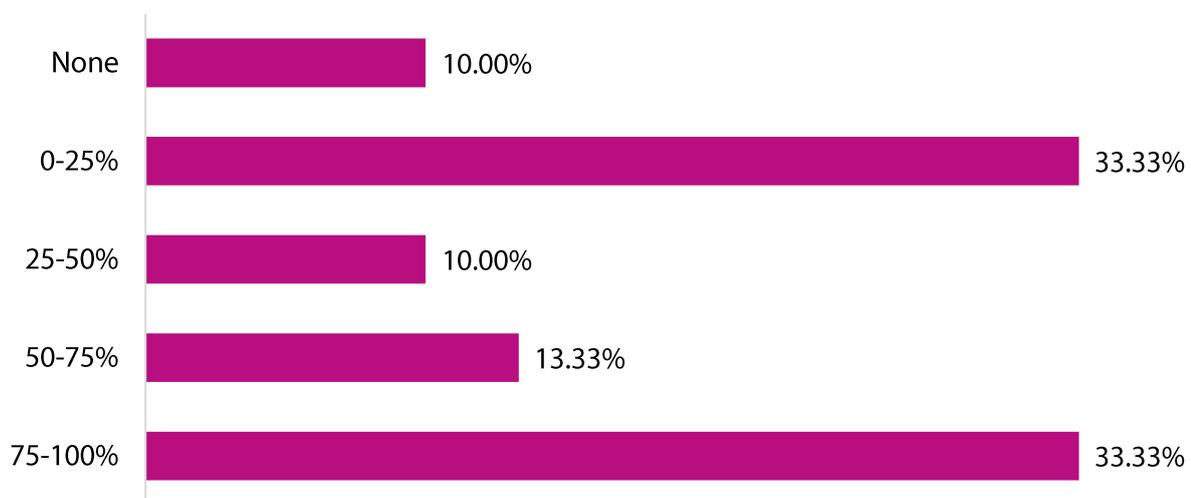
The percentage of footway network salted for most authorities was roughly 10% or under with the top respondent salting 30% of footways.

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



The majority of respondents salt the footways of town/city centre streets (79.31%) and shopping centres (72.41%). 34.48% salt council premises, 24.14% salt police stations, medical centres and hospitals and 13.79% salt other streets. Other answers included: access routes to schools, hills steeper than 10%, bus stops, and caring establishments.

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



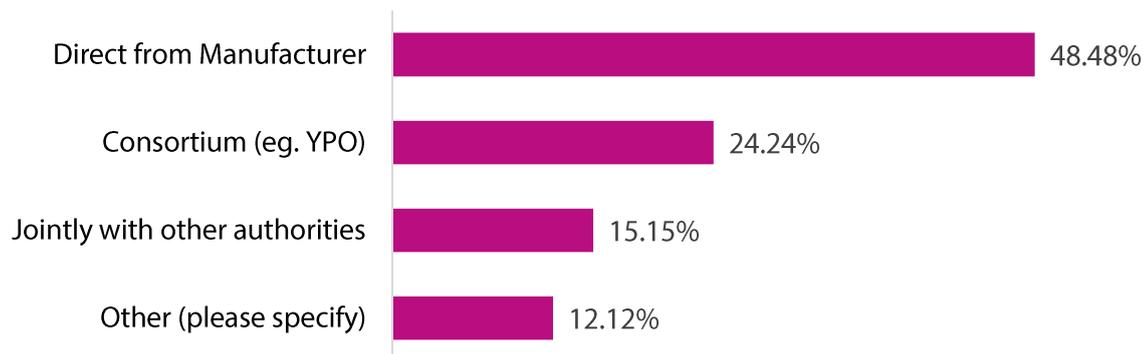
Most of the respondents managed to carry out between 75-100% of necessary footway salting or 0-25% of salting (33.33%).

Were the orders you placed for salt to cover last winter's maintenance operations met by your suppliers?



100.00% of orders for salt were met in full.

How do you purchase salt supplies?



48.48% purchase salt directly from the manufacturer, 24.24% purchase salt through a consortium and 15.15% purchase salt jointly with other authorities. Other responses included via Scotland Excel, via the SXL Framework, and through their winter maintenance contractors.

Which company supplies your salt?

- Compass Minerals
- ICL
- Cheshire Salt Union (1)
- Irish Salt Mining
- Peacock

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:

- Replenish frequently
- Holding a contingency salt stock
- Purchasing in the summer and storing in a salt dome
- Monitoring stock levels
- Sharing salt stocks with neighbouring councils
- Good planning
- Looking at materials and solutions which are more effective
- Having larger salt storage areas

6 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:

- Active travel routes / de-icing cycle way networks
- Footway gritting
- Improved data collection
- Delivering work for internal services
- Urban expansion
- More intelligent salting through autosalting
- Selling winter services to private companies
- Enhanced service provision

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:

- Budget reductions
- Treatment of minor roads
- Non-statutory community support
- Reducing numbers of grit bins
- Percentage of the network treated
- Residential streets and new adoptions

7 APSE Comment

Winter maintenance has come under budgetary 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 optimisation, 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 an option at present

Increasingly winter policies are being tightened; whereas in past years grit bins were located by request, they are now required to meet certain criteria and have consequently greatly diminished. Emphasis is moving towards gully emptying to deal with the increased sporadic rain.

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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:

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- Education Catering
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- 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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