

# State of the Market Survey

2021

Local Authority Street Lighting Services



December 2021

21 -51

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

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](mailto: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.

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**Association for Public Service Excellence**

3<sup>rd</sup> Floor Trafford House

Chester Road

Manchester M32 0RS

**telephone: 0161 772 1810**

**fax: 0161 772 1811**

**web: [www.apse.org.uk](http://www.apse.org.uk)**

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## Results at a glance

### Service

% of street lighting services currently delivered <b>in house /combined service</b>	<b>82.93%</b>
% of respondents who sell their services to organisations external to the council	<b>70.97%</b>
% who have a CMS System	<b>58.62%</b>
% of responding councils who scout for failures	<b>30.00%</b>
% of respondents whose approach to lamp replacement is burn to extinction	<b>77.27%</b>
% of respondents whose approach to lamp replacement is planned replacement	<b>22.73%</b>

### Budgets

% whose budget has decreased from the last financial year	<b>23.53%</b>
% whose training budget has stayed the same over the past 12 months	<b>80.00%</b>

### Staff

Average age of street lighting operational staff among respondents	<b>46 years</b>
% who feel staff absence levels are at an acceptable level	<b>80.65%</b>
% who run an apprenticeship scheme	<b>38.71%</b>
% with difficulty recruiting operatives	<b>36.67%</b>
% with difficulty retaining operatives	<b>13.33%</b>
% with difficulty recruiting technical/managerial staff	<b>30.00%</b>
% with difficulty retaining technical/managerial staff	<b>20.00%</b>

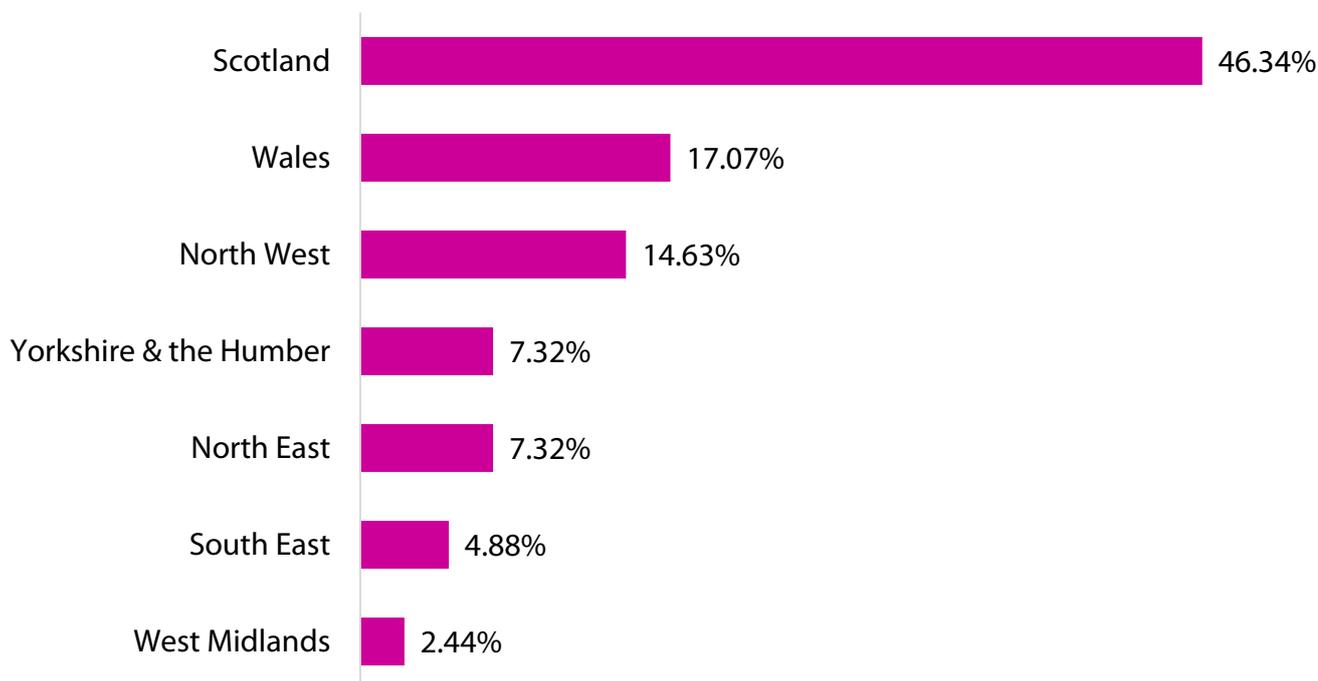
# Introduction

APSE conducted an online survey during October 2021. A series of questions were asked covering a range of issues of interest to those officers, managers and councillors responsible for Street Lighting services.

State of the Market surveys are an attempt to understand perceptions of the market amongst people directly involved in delivering services.

There were 41 responses from local authorities to this survey. 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 street lighting though as the surveys are conducted on an annual basis it is possible to utilise the data as a light-touch analysis of changes over time.**

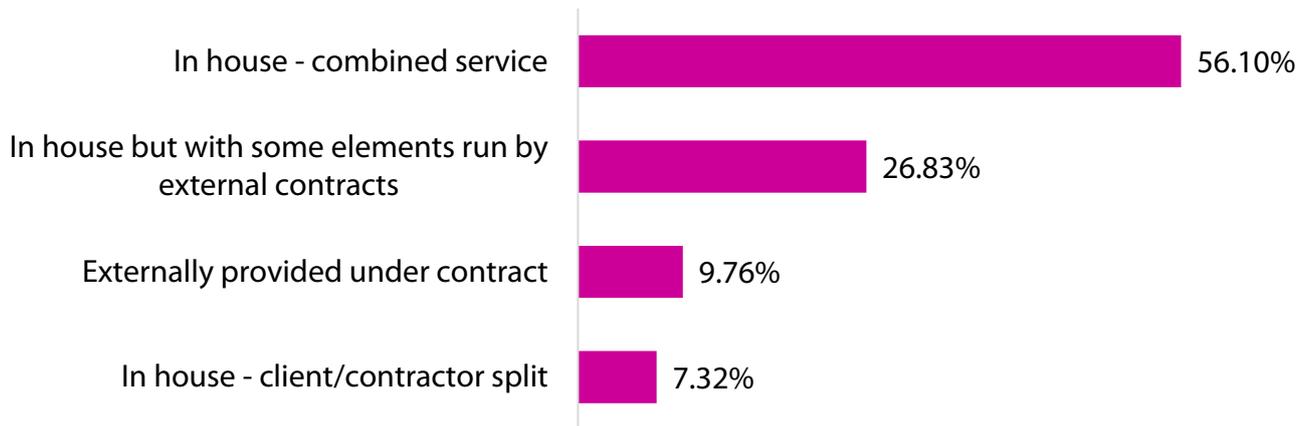
## Where in the UK do you work?



The table above shows the breakdown of where the respondents to the survey are located in the UK.

## Section 1 – The Service

How are your street lighting services currently delivered?



The majority of respondents' street lighting services are currently delivered via an in-house combined service (56.10%), 26.83% are delivered in-house but with some elements run by external contracts and 7.32% are delivered via an in-house client/contractor split. 9.76% are externally provided under contract.

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



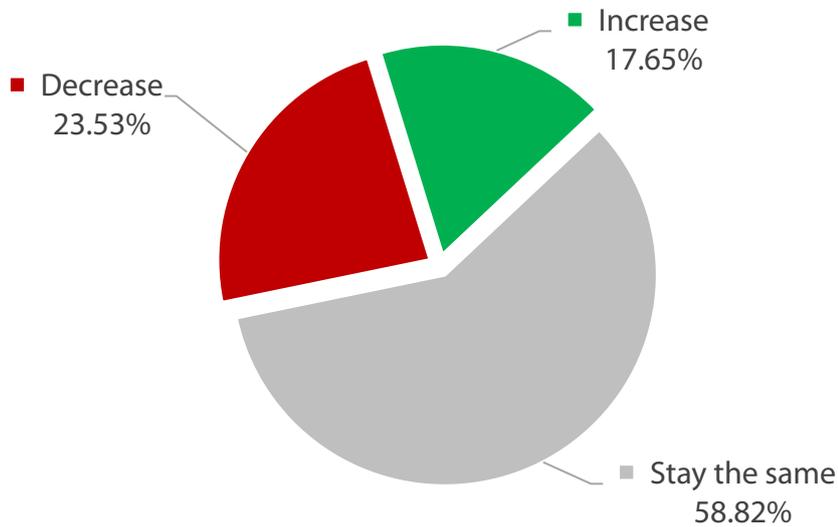
97.22% of respondents with a service currently provided in house expect the service to remain this way over the next 12 months.

### Approximately how many street lights does the authority maintain?

Authorities reported maintaining between 13,000 and 122,618 street lights with an average of 36,775.

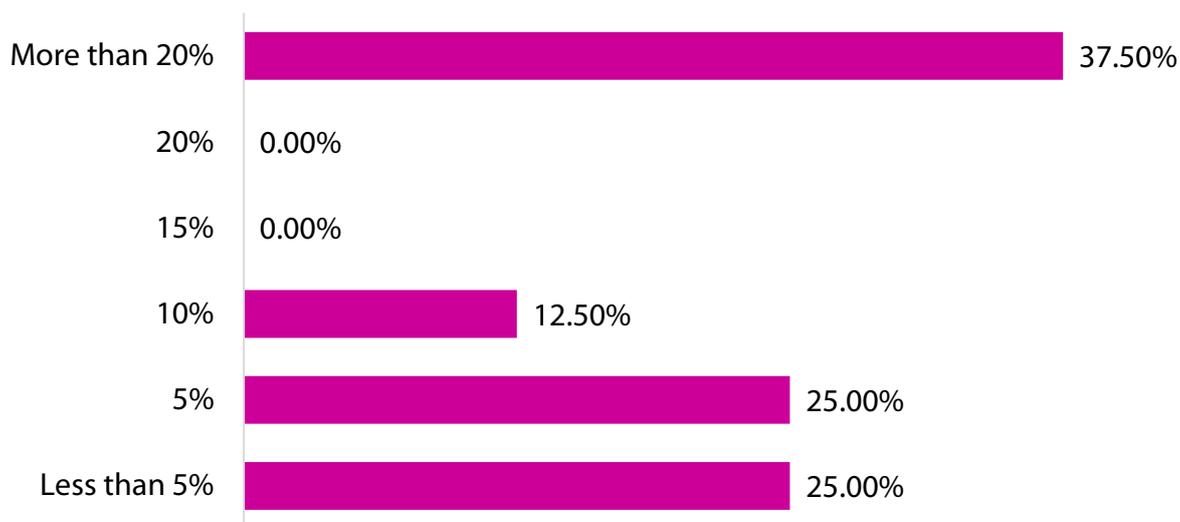
# Section 2 – Budget

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



While most respondents' street lighting budgets have remained the same as the last financial year (58.82%), 23.53% experienced a decrease and 17.65% experienced an increase.

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



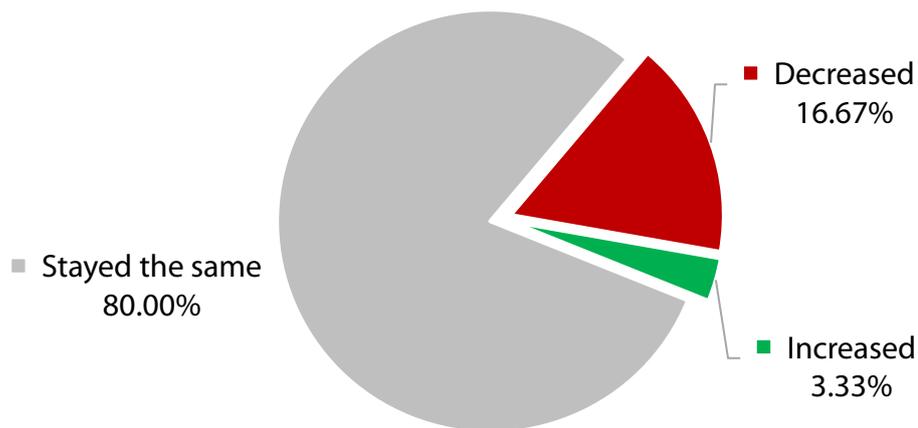
Responding councils have experienced a variety of different decreases in budgets from less than 5% (25.00%) with the majority experiencing decreases of more than 20% (37.50%).

## To what extent will this year's budget for street lighting meet the need for maintenance / investment?

0 – 25%	2.94%
25 – 50%	11.76%
50 – 75%	29.41%
75 – 100%	47.06%
100%	8.82%

47.06% of respondents believe that their budget for street lighting will meet between 75% and 100% of their need for maintenance / investment. On the other end of the scale, 2.94% of respondents felt that the budget would meet between 0% and 25% of their needs.

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

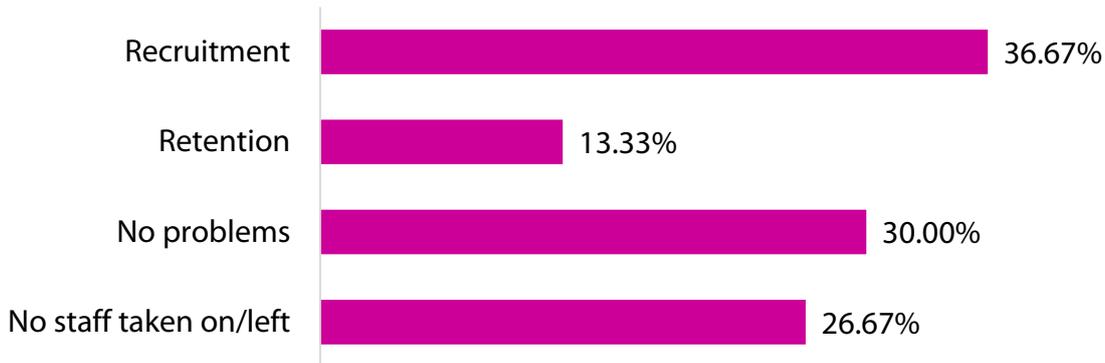


The majority of respondents' (80.00%) training budgets have stayed the same over the past 12 months. 16.67% of them decreased, and 3.33% of them increased.

# Section 3 – Staffing

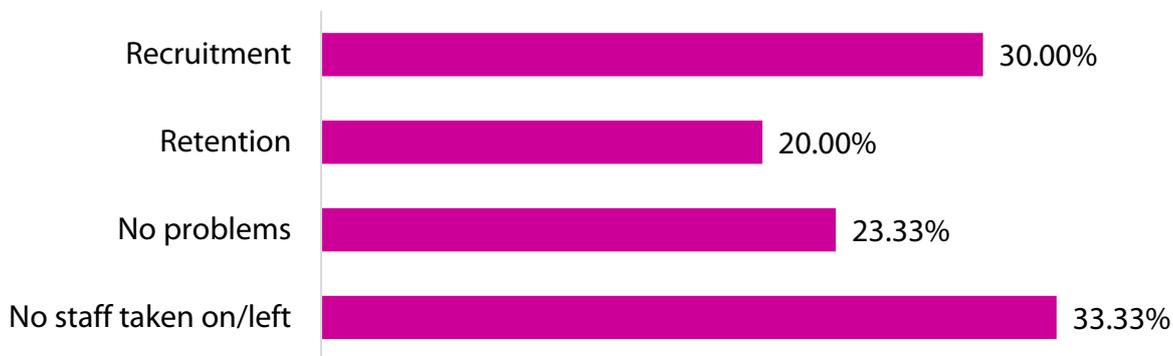
Where have you had difficulty recruiting or retaining staff (over the past 12 months)?

## Operatives



36.67% of respondents had difficulty recruiting operatives, and 13.33% experienced issues retaining them. 30.00% reported as having no problems, and 26.67% said that no staff had been taken on or left.

## Technical/Managerial staff



30.00% had issues recruiting technical/managerial staff, and 20.00% experienced issues retaining them. 23.33% said they had no problems, and 33.33% said that no staff had been taken on or left.

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



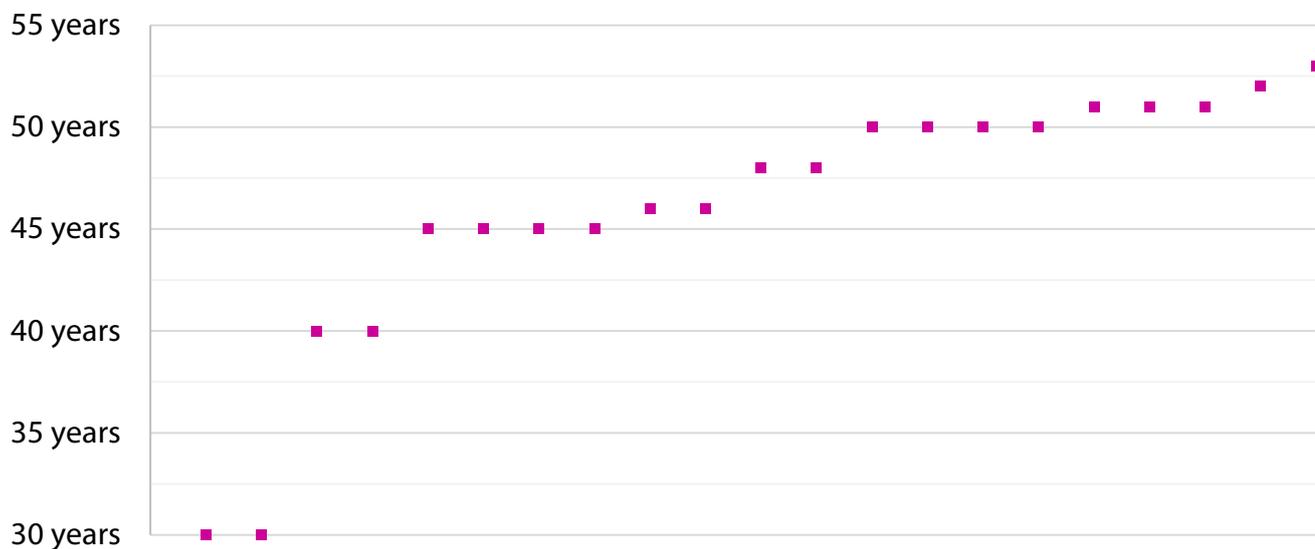
80.65% said that they did personally feel staff absence levels are at an acceptable level.

### Do you run an apprenticeship scheme?



38.71% of respondents run an apprenticeship scheme. **There is clearly scope to increase apprenticeships which in turn may help address the reported one third of councils who are experiencing recruitment issues.**

### What is the average age of your street lighting operational staff?



The average age of street lighting operational staff was 46 years, with the lowest average age reported as 30 years and the oldest average age among respondents was 53 years.

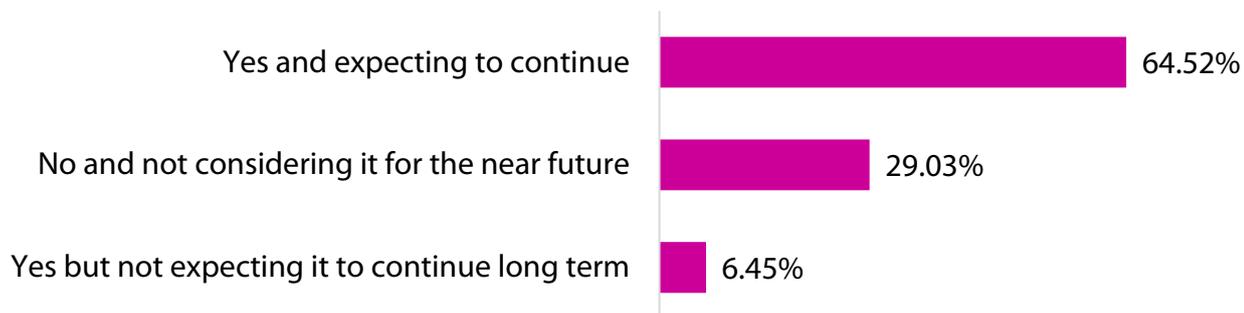
# Section 4 – Service Delivery

What energy saving initiatives have you undertaken? What proportion of the lighting stock do you estimate is affected?

	Zero	0-10%	10-20%	20-30%	30-40%	>40%
Lamp switch off ( eg. 2am-5am)	65.22%	26.09%	0.00%	0.00%	0.00%	8.70%
LED Lighting	0.00%	0.00%	0.00%	10.00%	0.00%	90.00%
Lamp dimming	17.24%	0.00%	3.45%	6.90%	3.45%	68.97%
Reduced lighting hours	56.52%	8.70%	0.00%	0.00%	0.00%	34.78%

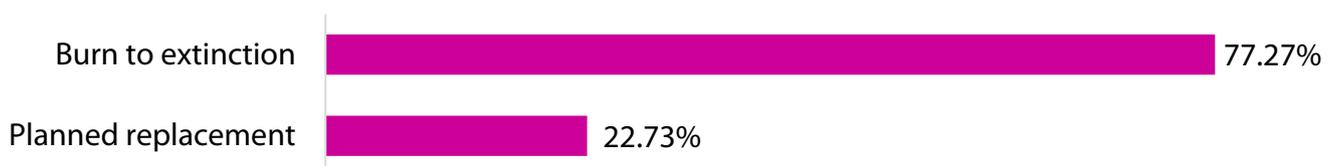
The table above shows the different approaches taken by local authorities with regards to different energy saving methods.

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



Most respondents are selling their services to organisations external to the council and expecting to continue this (64.52%). 6.45% are currently selling their services but are not expecting it to continue long term. 29.03% are not selling their services and are not considering this.

What is your council’s approach to lamp replacement within your street lights?



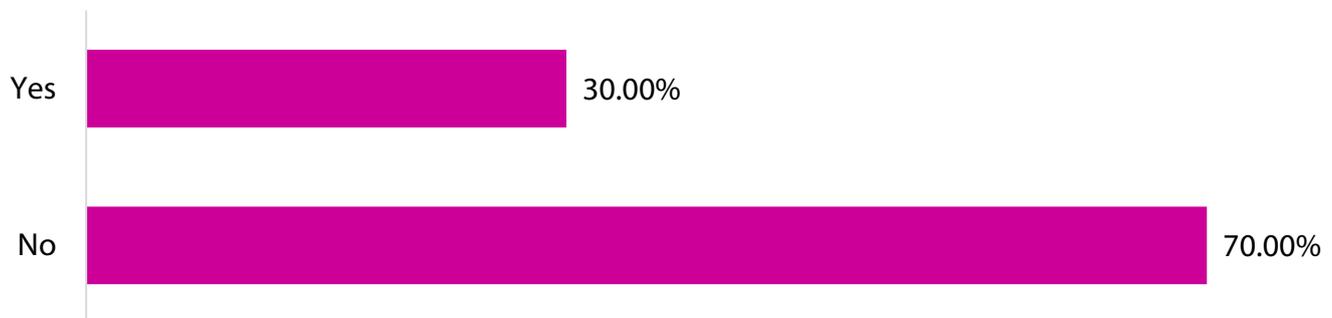
The majority of responding councils’ approach to lamp replacement is burn to extinction (77.27%) rather than planned replacement (22.73%).

## Do you have a CMS System?



58.62% of respondents have a CMS System, 41.38% do not.

## Does your council scout for failures?



30.00% of responding councils scout for failures. **This reflects the reduced need for scouting as the switch to LED and replacement column investment has improved performance and significantly reduced failures.**

## How does your council track energy usage (by half hourly metering, estimated annual consumption or other)?

Half Hourly Metering	21
Estimated Annual Consumption	4
CMS	3

Among respondents, half hourly metering was the most common method of tracking energy usage.

## What is your council's target time for restoring street lights to working order (in days)?

2 days	1
3 days	2
5 days	8
7 days	12

More than 7 days	7
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The most common council target time among respondents for restoring street lights to working order was 7 days. However, triangulating this data to performance networks data, the majority of councils exceed this target carrying out much quicker restoration times.

## Which energy supplier do you use?

EDF	20
Greater Manchester Consortium Energy Procurement	2
NPower	6
Scottish Power	1
Total Power	1

Responding councils use a range of different energy suppliers, with the most common being EDF.

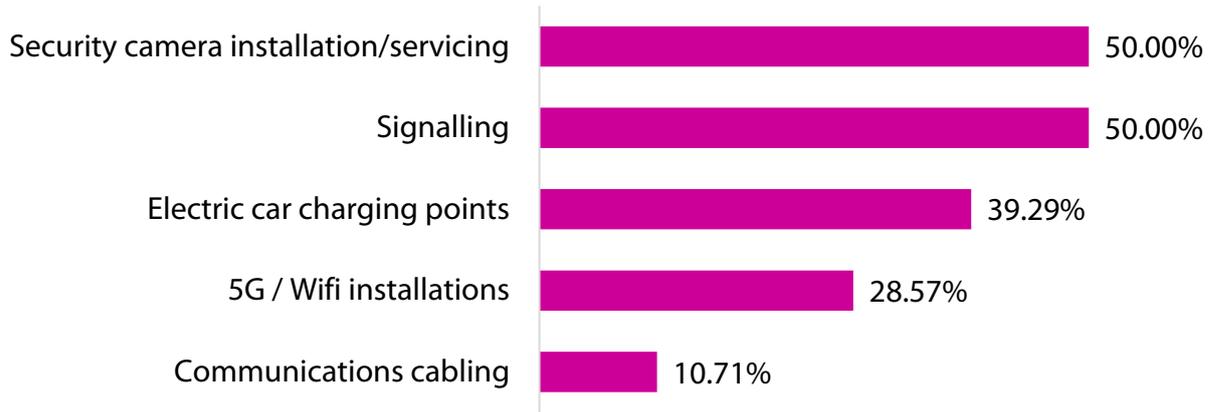
## What is the length of your current energy contract?

The respondents have a range of contract lengths with the average being between 2-3 years.

## When does your current energy contract end?

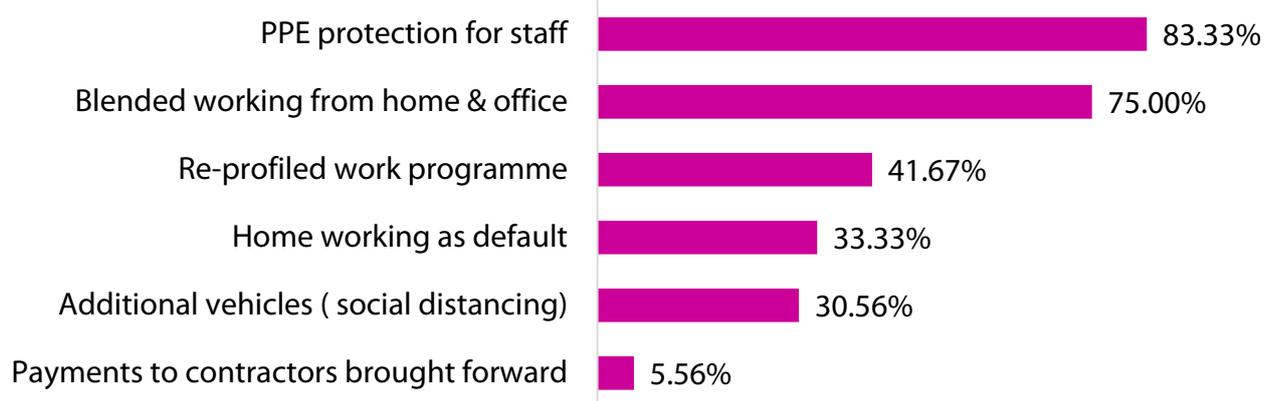
Current energy contracts have a range of end dates with 2023 being the current end date for the majority of the respondents

## What non-street-lighting tasks do you undertake?



The most common non-street-lighting tasks undertaken by respondents are security camera installation/servicing (50.00%) and signalling (50.00%).

## What have been the lasting effects of COVID-19?



The most common lasting effects of COVID-19 are PPE protection for staff (83.33%) and blended working from home and office at 75.00%, with just a third reporting home-working by default; this supports the findings during the lockdown period when frontline services tended to ensure that depots and other workplaces remained open for service needs. Again looking to APSE performance networks data the additional costs associated with extra vehicles to accommodate social distancing is a recurring theme in many frontline services.

# Section 5 – Opinions

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

While several respondents noted that they did not see any growth areas for the service over the next 12 months, responses from those who did include:

- Capital works replacing aged columns
- Electric vehicle infrastructure
- Design services
- LED operations
- Smart city/smart county rollout
- Facilitating 5G installations
- Private developments
- New development adoptions
- Wind and solar generation
- Structural and electrical testing

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

Respondents noted that they didn't anticipate many areas where work would decrease other than **lamp replacement** and **routine fault maintenance** because of the switch to LEDs.

### APSE Analysis

Street lighting services are a critical frontline service for communities and help to ensure that areas are safe, and feel safe for residents and road users. The service has made great strides in recent years to reduce energy consumption, through LED replacement programmes, alongside other energy saving initiatives. That being said the service faces pressure from energy providers who are seeking to recover lost revenue from energy use decline by increasing prices for standing charges.

The service is already making significant contributions to carbon reductions and work in this area will continue with the development of new initiatives, such as solar panels for some new small scale schemes, and alternatives means of illumination on traffic signs.

Like many frontline areas the last twelve months have been challenging with the changes needed to keep services operational through COVID-19, and some underlying costs from this will continue, with measures such as additional PPE still in place. The APSE street-lighting network will continue to be a source for sharing best practice in the local authority street-lighting community.

## Local Authority Street Lighting Services

### State of the Market 2021

#### 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. Due to Covid-19, these are held online, at present, 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](mailto: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
- Renewables and Climate Change Network
- Sports and Leisure Management
- Vehicle Maintenance and Transport
- Waste Management, Refuse Collection and Street Cleansing