



GROUNDS MANAGEMENT - 'THE HIDDEN PROFESSION'

INTRODUCTION AND EXECUTIVE SUMMARY

1. During development of 'Challenging Perceptions', the IOG Strategy for 2006-2012, it became clear that there was very little data available on the grounds management and groundsmanship industry. Much that is available is anecdotal and fragmented.
2. In 2007 the IOG commissioned **TrioPlus** to look further at the profile of the industry, to further review available data sources, and to try to put some sort of economic value on the industry on an annual basis.
3. Confirming the profile and some of the anecdotal views of the industry has been reasonably straightforward although some of the trends are causes for concern in terms of the future preparation and standard of playing surfaces.
4. Ascertaining the scale and value of the industry has proven to be completely the opposite of straightforward. Although there are now extensive evidence-based studies of the economic impact of the sport and leisure industry British Isles wide, grounds management and maintenance is rarely mentioned nationally or at regional level. Furthermore, even studies undertaken within the landscape and horticulture industries tend not to segment individual parts of the sector. The overall picture is further complicated by a lack of any consistent study across the British Isles, ie. the geographical scope of IOG membership and immediate partnership.
5. This Report provides an interim statement about the industry. It is our view that it takes sector research forward to the next stage but, in the case of the scale and economic value, we believe it is reliable, and indeed probably quite conservative, but it is by no means complete or conclusive. It also quite deliberately places a focus on England for the simple reason that in the circumstances it became easier to compile data that was comparable.
6. For purposes of definition our focus has been on the preparation and maintenance of grass and artificial surfaces for sport rather than a wider definition that encompasses parks, gardens, grassed areas and open spaces although almost inevitably there will be some overlap. The figures presented are based on desk research, telephone interview, survey and sampling work undertaken during the 4th quarter of 2007 and 1st quarter of 2008.
7. It is also just worth noting that, although not within the scope of our definition, many of the issues we faced and indeed many of the conclusions we draw appear to be applicable to the wider parks, open spaces and horticulture industries. We encountered very similar documentation produced by the Commission for Architecture and the Built Environment (CABE) in the case of parks and open spaces and the Horticultural Trades Association in the case of horticulture.

8. The Report is divided into two quite distinct sections. Section One looks at the profile of the industry, the people who work in it, their entry and career, their salaries, their job satisfaction, their training opportunities, and some of the related issues for the future. It also takes into account the views of 30 employers we made direct contact with.
9. It concludes that the industry:
 - Does not currently attract females, less than half of 1%
 - Is largely staffed by older males, typically aged 40-49 years, who have been in post for several years, and who are largely satisfied in their job
 - Has very limited career progression or movement
 - Is poorly paid, salaries are low in comparison to other industries and the average wage for the UK
 - Does not rank highly with most employers. Less than half of those surveyed felt that their employer has a very good understanding of the skills required by their job. Some employers we spoke to were similarly dismissive of the profession
 - Does not get a priority in terms of training from employers. 40% of those surveyed feel that they would benefit from additional training and 40% of those surveyed had not had any training during the past 12 months, a cause for concern given the nature of the industry and rapidly developing technology and regulation
 - Does not necessarily appeal to younger people largely due to salary and potential training and progression issues. One third of those surveyed, most notably younger people, were less than satisfied with their current position and employers noted that they could not recruit young people with the right qualifications
 - Does not appeal as a career choice at present. Of those surveyed the majority move into the industry via 'indirect' entry routes (e.g. the influence of family/friends, by accident, love of outdoors etc.)
 - Only attracts a limited number of professionals who make a definite career choice, currently just under 10%.
10. Section Two, the more difficult area, attempts to provide an initial assessment of the scale and economic value of the industry. Even if it eventually proves to be wide of the actual mark it does confirm the grounds management and maintenance industry as significant in terms of the numbers employed and its annual value in the sport and leisure economy.
11. It concludes that the grounds management and maintenance sector is a significant industry with annual revenue spend in England alone in excess of £580million. In addition it highlights nearly 20,000 people working in the industry on a full time basis and more than 20,000 volunteers.
12. This value and the numbers will increase as further information becomes available as we found it almost impossible to find reliable

date for the state school sector and the non-local government elements of the public sector.

13. To take this second part of the work further forward we recommend that, in line with its Strategy commitment, the IOG forms a partnership with one of the pre-eminent Universities that specialises in economic impact work, possibly the Sport Industry Research Centre (SIRC) based at Sheffield Hallam University. This could take the form of directly funding a dedicated post-graduate Research Assistant, initially for one year, and ensuring that future wider sport and leisure studies recognise grounds management and maintenance as an important and integral component worth identification in its own right.

SECTION ONE: INDUSTRY PROFILE

14. As part of the IOG Industry study, we undertook a 'qualitative and quantitative' Groundsman survey at the IOG Saltex Trade Show at Royal Windsor Racecourse (5th-6th September 2007). This work supplemented and confirmed the findings drawn from previous telephone interviews with 30 employers and 30 employees working in the industry. This Summary highlights the findings of the research exercise in order to help establish a 'typical' profile of a groundsman and to identify important skills and training issues within the sector. It is anticipated that the research findings will help to focus future strategy and development plans for the IOG.
15. Approximately 300 grounds people were surveyed face-to-face, as part of the research exercise, (by 4 trained market researchers). The large sample size enabled a full detailed statistical analysis (using SPSS software) to determine quantitative information (e.g. age, gender, salary, length in service etc.) and qualitative information (e.g. skills, training, job satisfaction etc.).
16. The questionnaire was purposely kept brief in order to maximise response rate and minimise disruption and duplication of the Ithaca visitor survey that was also being conducted at IOG Saltex. The research focused only on 'sports grounds people', i.e. respondents were asked an initial screening question; 'Are you involved in the maintenance of sports grounds (incl. horse racing)? – the survey was then continued on a 'yes' response. A summary of the key findings for each survey question is provided below.

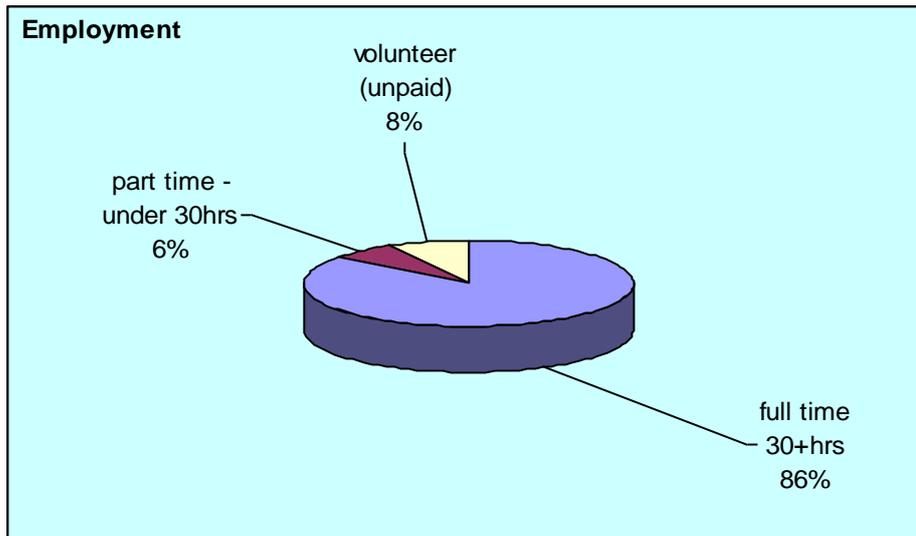
Qu 1a. Most Popular Job Titles

Ranking	Job Title	Percentage
1	Groundsman	42.1%
2	Greenkeeper	20.4%
3	Trainee Groundsman	11.3%
4	Manager	7.1%
5	Head Gardener	5.0%
6	Assistant Groundsman	3.3%
7	Assistant Greenkeeper	3.3%
8	Managing Director	2.5%
9	Assistant Manager	2.1%
10	Lawn Technician	1.3%
11	Assistant Gardener	0.4%
12	Other	1.1%

Qu 1b. Gender

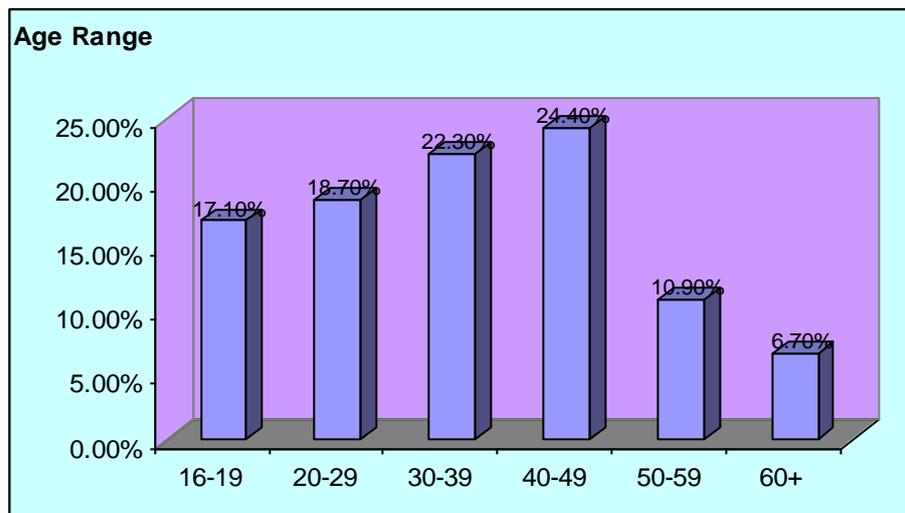
17. Unsurprisingly 99.6% of those surveyed were male with only 0.4% female – confirming the belief that the sector on the whole attracts males.

Qu 2a. Employment



18. The vast majority of respondents were working in full-time positions (more than 30hrs per week). Interestingly there were slightly more people working in unpaid positions (8%) than people in part-time positions (6%).

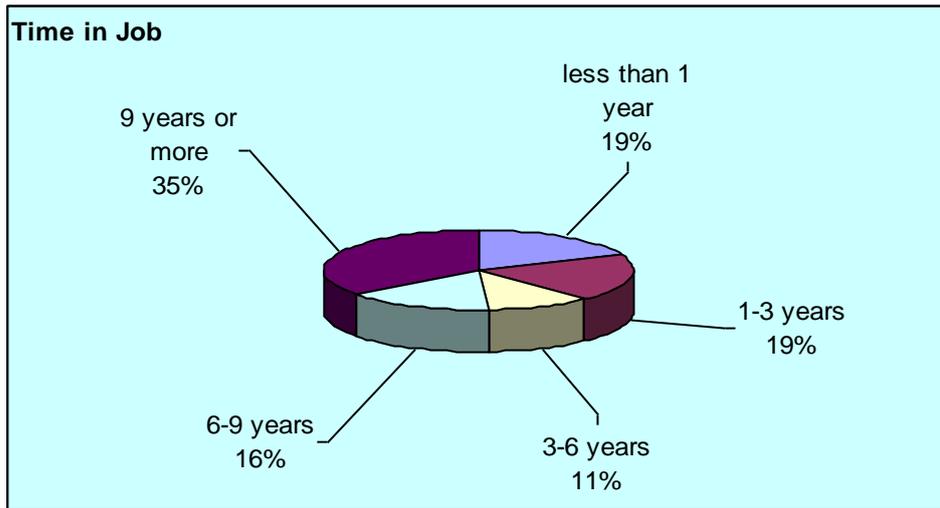
Qu 2b. Age



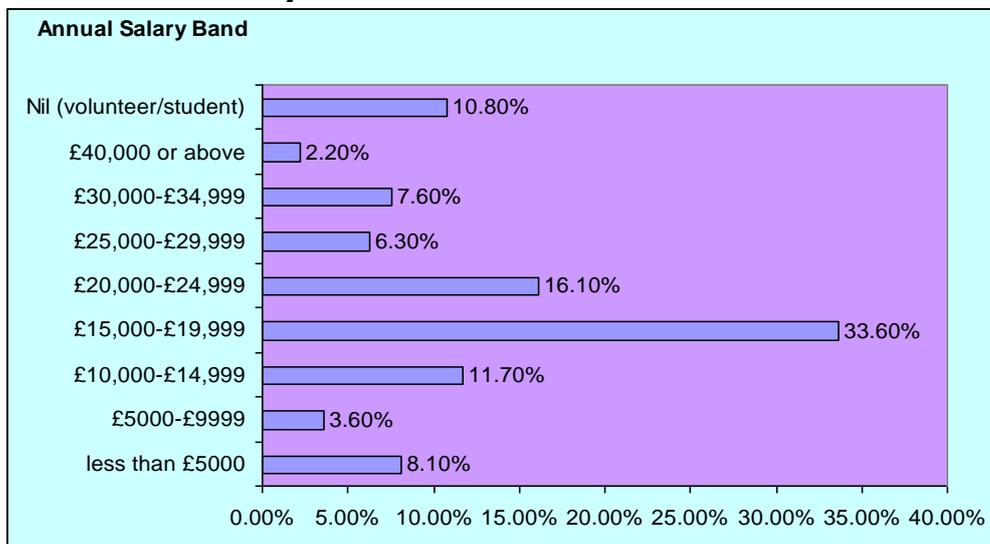
19. The survey sample highlights that the most common age range of the respondents was the 40-49 years age group (24.40%), followed closely by the 30-39 age group (22.30%).

Qu 3. Time in Job

20. The pie-chart illustrates that the majority of respondents (35.6%) have been in their current job for 9 years or more – with over half of these (65.4%) who have been in their job 10-20 years. This indicates that there is not much movement within the sector in terms of career progression.

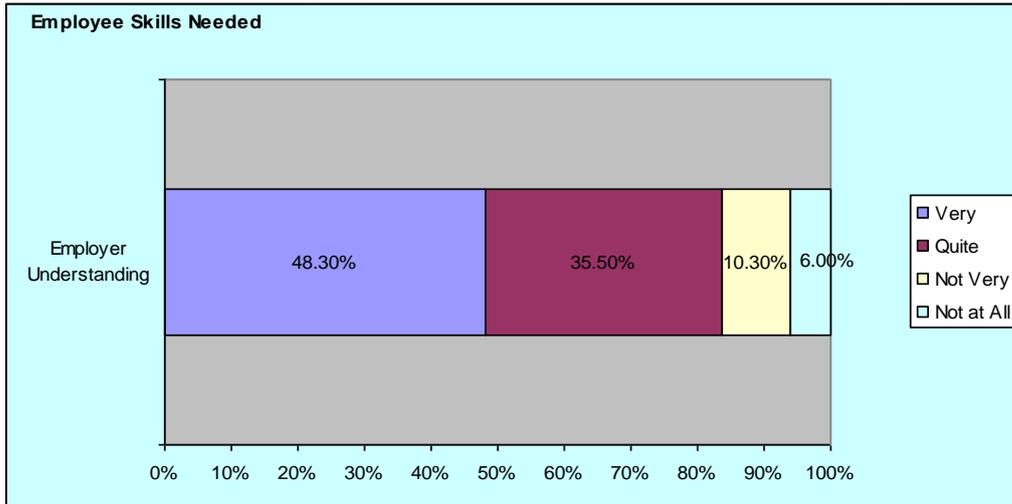


Qu 4. Annual Salary Band



21. Given that most respondents have been in their job over 9 years, a salary of £15,000 to £19,999 is low in comparison to other industries.
22. Combined with previous conversations with employers and employees we found that typically a Head Groundsman had been in post more than 10 years, and was earning in the range £15,000 - £24,999. Assistants were normally earning in the £10,000 -£19,999 range, thus confirming the low pay status of the industry. At April 2007 the Office of National Statistics gave the average earnings for a UK male employee as £25,896. At 50-55 years of age the average was £26,832.

Qu 5. How well Employer understands Skills needed by Employee



23. It is important to note that just under half (48.3%) of employees felt that their employer understands the skills they need for their job 'very' well. While the majority felt that their employer understands 'quite' 'not very' or 'not at all' well. 16% fell into the two negative categories.

Qu 6. Aspects of Job that would benefit from Additional training.



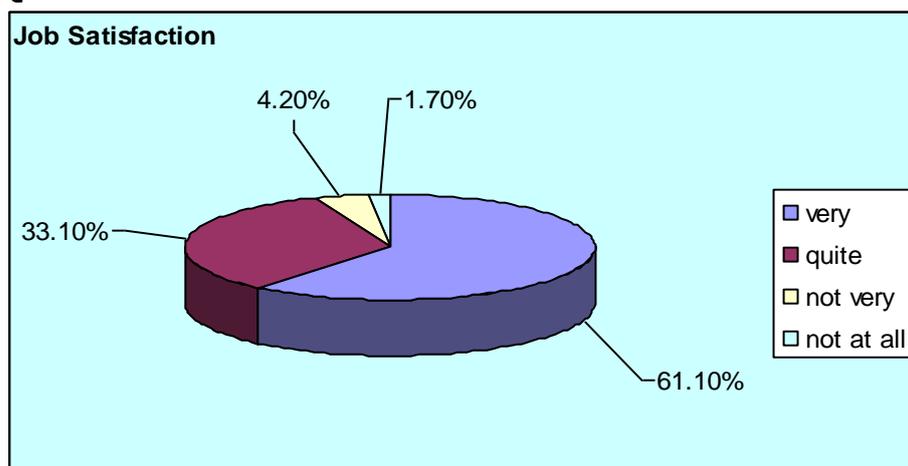
24. Just under 40% of respondents felt that there were aspects of their job which would benefit from additional training, when prompted the following desired training was specified; Btech, Chemical Handling, Fine turf training, Health & Safety, IT, Irrigation, Mowing, Pesticides, Spraying and Tree work.

Qu 7. Organisation has provided training in last 12 months



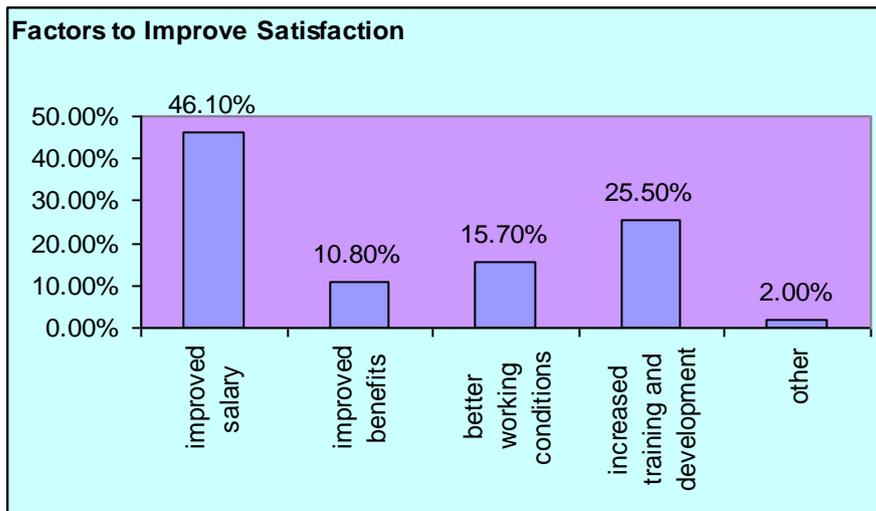
25. When asked, approximately 40% of respondents stated that they had not had any training in the last 12 months – this correlated well with the previous question where almost 40% felt that they needed additional training. Of those that stated they had received training, the following courses had been specified; Btech, Chainsaw Certificate, First Aid, Health & Safety, Hydraulics, IOG course, IT, Machine Handling, NVQ, Pesticides, Shredder course, Spraying and Turf Management.
26. This finding was the cause of some concern and confirmed earlier interviews. We also found when talking to employers that some were very negative about the value of training for grounds staff, citing that they were often low academic achievers, were 'difficult to train', lacked communication and written skills. Most employers cited cost and time as a limiting factor.

Qu 8a. Job Satisfaction



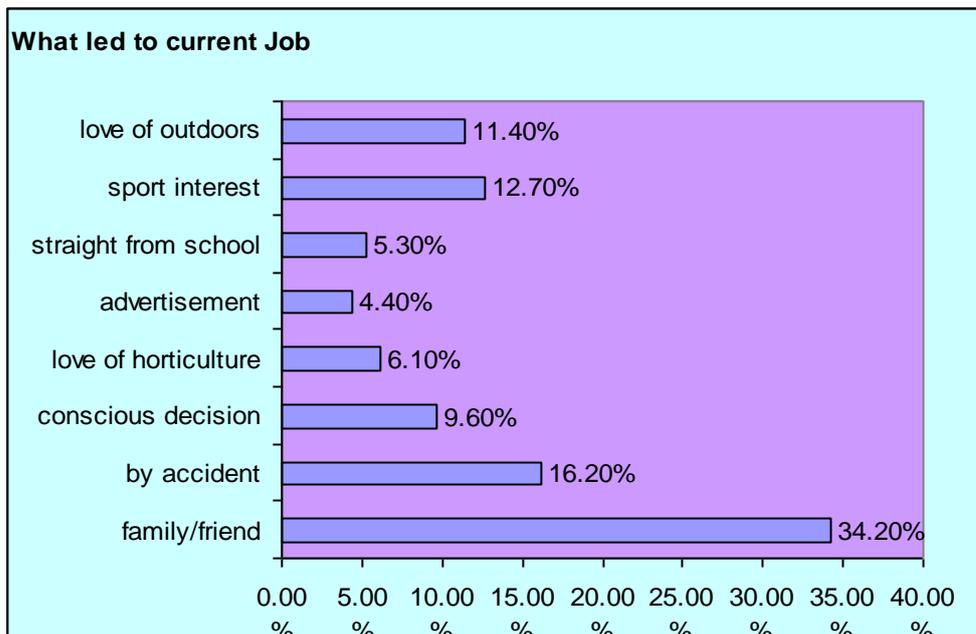
27. On the whole the majority of respondents affirmed that they were satisfied with their jobs (61.10%). However over a third of respondents felt 'quite', 'not very' or 'not at all' satisfied with their job. It was very noticeable that the most dissatisfaction was expressed by younger interviewees and this confirmed an earlier finding that employers found it difficult when trying to attract young people into the industry. This would appear to be a particularly difficult task in London and the south east due to the high cost of living and housing costs but other employers made the point about lack of applicants or lack of applicants with suitable qualifications.
28. Some employers also made the point that they had long established staff in post at present but were uncertain about how they would recruit when those staff reached retirement age.

Qu 8b. Factors to help improve Job Satisfaction



28.1. Those respondents who felt quite, not very or not at all satisfied with their job cited 'improved salary' as the main factor which would help improve their job satisfaction (46.10%), followed by 'increased training and development' (25.5%).

Qu 9. How did you become involved in the Grounds Sector



28.2. It is a concern to note that only 9.6% of respondents stated that they were in their current role through a conscious decision – implying that the majority of grounds staff do not enter the industry as the result of a 'serious career choice'. The majority of respondents cited 'family/friend' as the reason they were in their current role followed by 'accident'.

Summary

29. The survey highlights several areas of concern for the industry:

- Does not currently attract females
 - Attracts older males, typically aged 40-49 years
 - Once in the job there is limited career progression or movement
 - Salaries are low in comparison to other industries
 - Less than half feel that their employer has a very good understanding of the skills required by their job
 - 40% feel that they would benefit from additional training
 - 40% have **not** had any training in the last 12 months
 - Over a third feel that their job satisfaction could be improved by several factors incl. improved salary or increased training/development
 - The majority move into the industry via 'indirect' entry routes (e.g. the influence of family/friends, by accident, love of outdoors etc.)
 - A small percentage (9.6%) of workers have made a conscious decision to work in the industry at the outset – i.e. a serious career choice.
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SECTION TWO: SCALE AND ECONOMIC VALUE

Introduction and Wider Context

30. The principal aim of this section is twofold:
 - To provide some estimate of the numbers directly working in the industry
 - To provide some idea of the levels of annual revenue expenditure
31. In each instance the approach adopted is similar to the National Income Accounting model recognised by Government and has drawn on desk research, salary data, telephone interview and sampling in each area.
32. The focus has been on collecting information in the following areas and then extrapolating it to arrive at a provisional national model for England in terms of numbers and value:
 - Number of playing sites
 - Numbers employed at sample sites
 - Average salary levels drawn from sample sites, wider surveys and IOG Annual Salary Survey
 - Annual operating budget drawn from sample sites, desk research, expert advice
 - Any other relevant factors
33. Where it has been available we have also made reference to capital expenditure which is significant but again not readily available as a figure in most instances.
34. Initially we also broke the industry down into a number of manageable topics as follows:
 - Association Football
 - Rugby (both codes)
 - Cricket
 - Tennis
 - Golf
 - Horse Racing
 - Local Government
 - MOD/Police/other Public Sector
 - Education to include Higher Education, Independent Schools and the state funded sector

35. We have gleaned information for 8 of the 9 areas, but the very significant areas relating to MOD/Police/other Public Sector and state funded primary/secondary Education require considerably more work to arrive at any sort of reliable figure. There are still gaps in other areas but the basis has been laid using available data.
36. To put the sector into a wider context, in December 2007 Sport England published its Economic Importance of Sport 1985-2005 together with Regional subsets. The Report concludes that sport-related economic activity totalled £15.47billion in the year 2005. Sport-related employment accounted for 434,000 jobs, just under 2% of all employment.
37. The study takes into account the wider sport-related activity including:
 - Consumer spending
 - Commercial Sport including spectator sports clubs, sports goods manufacturers and retailers
 - Commercial non-sport – including suppliers of sport-related goods and services such as sport gambling products
 - Voluntary Sport
 - Local Government including activity at local authority-owned sports facilities, sport-related grants from central Government and business rates paid by the commercial and voluntary sectors.
38. Regrettably, at no point in the study does it mention grounds management and maintenance and this is a similar pattern in other studies we reviewed produced both by Government agencies and by consultancy undertaken on behalf of other organisations (with the exception of golf).
39. In terms of the overall facility stock relating to grounds management and maintenance the Active Places database, which is largely recognised as being the most comprehensive register of facilities, confirms that there are currently 54,585 grass playing surfaces in England and 1,629 synthetic turf pitches. The English Golf Partnership gave a figure of 1,538 18-hole golf courses, 433 9-hole courses and 81 par 3 courses. There are 52 racecourses in England.

Topic Analysis

Association Football

40. The Register of English Football Facilities (REFF) identifies 44,874 pitches at 21,000 sites.
41. Ownership is broken down into local authorities 36%, education 24%, parish councils 17%, clubs 18% and others 5%. According to

the study, due to school restrictions only 49% of the publicly-owned pitches are available to the community.

42. Our approach was to start at the top level and then move through the hierarchy of soccer. We organised a survey of Head Groundsmen at FA Premier League level which produced a limited (25%) response but gave us valuable data. We then used desk research to extrapolate the information throughout the professional game.
43. At Premier League level there were a distinct number of differences in terms of the range of salaries at Head Groundsman level. We were told of salaries in the region of £35,000-£40,000 but none were actually confirmed. Equally we have confirmation of salaries below £25,000 notwithstanding the level of responsibility.
44. Across the 20 Premier League Clubs the number of groundstaff appeared to be 9 on average taking responsibility for the main stadium pitch, academy and any other playing and training facilities. We worked on the basis of a salary of £30,000 per annum for the Head Groundsman, normally reporting to the Stadium/ Facilities Manager, plus an average salary of £15,000 per annum for supporting staff. This gave a total salary bill of £150,000 per annum per club.
45. Operating budgets appeared to be in the order of £150,000 per annum.
46. Therefore total numbers employed in the FAPL are c.180 with a total wage bill of £3million per annum. Similarly operating budgets would appear to be c.£3million per annum.
47. We could not obtain information on capital spend within the timescale.
48. At Football League level an average of 4 would seem to be typical, ie. Head Grounds Manager at £25,000 per annum plus 3 assistants averaging £15,000 per annum. The operating budget averages at c.£75,000, higher at some Championship Clubs but tapering further down the divisions.
49. This would suggest that some 288 staff are employed giving a cumulative wage bill of £5.04million and a cumulative operating budget of £5.4million per annum.
50. At Football Conference level a Head Groundsman and assistant would appear to be the norm, with a club wage bill of c.£30,000 and operating budget of £20,000 per annum.
51. 68 staff are employed at a wage cost of £2.04million, operations runs at £1.36million per annum.

52. It is worth just noting that in the lower leagues ground staff are likely to undertake a range of duties beyond purely tending pitches, and training grounds are regularly hired from other providers so there is potentially an element of double count.
53. Beyond the professional game it is very difficult to estimate the numbers involved and operating budgets without further detailed research. It would seem reasonable to work on the basis of 44,000 playing surfaces available at community level based on the REFF study. IOG professional standards suggest that each adult playing surface requires 300 units/hours per annum, approximately 8.3 working weeks based on a 36 hour working week. Some of the labour across this area will be on a voluntary basis, and we have deliberately not counted these figures in our overall analysis, but on an extrapolated basis it suggests that there are some 13,200 individuals, some employed, some working as volunteers, involved in the upkeep and maintenance of facilities.
54. There is a real danger of double count in this area as pitch providers include public sector organisations as well as voluntary clubs given that 82% of soccer is played on local government facilities. Voluntary Clubs would appear to comprise 18% of the total, on this basis, it would suggest c.2,375 individuals involved largely on a volunteer basis.

Rugby Union and Rugby League

55. Within Rugby Union there are 70 Clubs playing at the performance level. In Rugby League the comparative figure appears to be 59.
56. Some of the Clubs play at facilities shared with other sports but it appears reasonable to suggest that each has a Head Groundsman charged with the quality of pitch for their respective sport. An average salary of £17,500 would appear appropriate.
57. On this basis the multiplier would appear to be 129 multiplied by £17,500 giving a total salary bill of £2.257million.
58. We were unable to access reliable figures for operations.

Cricket

59. There are c.7500 cricket clubs affiliated to the England and Wales Cricket Board.
60. At the pinnacle are the 7 Test Match Grounds (becoming 8 in 2009) where 5 full time staff [Head Groundsman, Deputy and 3 assistants] is not unusual. This complement will expand to c.12 during the summer season often using part time labour to assist with minor tasks and ensuring that covers are quickly deployed and the ground dried when needed. We were informed that the Head Groundsman at one of these venues was likely to be in the range of £30,000-

£35,000 per annum with the remainder of the full time team in the £15,000-£25,000 range. The annual operating budget is in the range £75,000-£110,000

61. There are 10 One Day International venues (including the Test Match Grounds), this expands to 18 venues in total when the First Class County 'County Grounds' are taken into account, including Glamorgan County Cricket Club which has been included in the total. Outside of the Test Match Grounds the Head Groundsman was placed in a salary range of £22,000-£28,000 per annum, normally has 2 full-time assistants averaging £15,000 per annum, and an annual operating budget in the range of £40,000-£45,000. The staff complement will normally expand to 6 during the summer on a similar basis to the Test Match venues. Four of the grounds double as the focal point for Women's Cricket and the England Performance Squads.

62. Each First Class County will play matches at 'out grounds' in other parts of the County, 2 venues per County on average. These grounds are often independent schools or prominent Clubs. Beyond the First Class Game are the Minor Counties, using c.60 venues in all, and then a very significant number of Premier Clubs, 280, playing high level Club cricket. There will be a significant amount of crossover in this category of venue. A 2007 sample survey of 157 of the 280 Clubs playing Premier League cricket showed 97 paid groundsmen, 280 volunteer groundsmen and 486 volunteers carrying out general maintenance. The maintenance budget for a Premier Club would be in the range of £2,000-£4,000 per annum. Extrapolated to all 280 Clubs the figure would be 173 paid groundsmen in a salary range of £5,000 - £20,000, 500 volunteer groundsmen and 867 volunteers carrying out general maintenance. Operating budgets at c.£3,000 per annum would total £840,000.

63. Below this are large numbers of local clubs competing in local leagues, approximately 5,000 in England in total. A sample of 750 Clubs shows 350 paid groundsmen, many of whom are part time or tending other facilities in addition to the cricket, 1145 unpaid volunteer ground staff and 2170 assisting with general maintenance. Extrapolated to 5,000 Clubs the figures would be c. 2,300 paid groundsmen in a salary range of £3,000 - £8,000, 7,600 unpaid volunteer ground staff and 14,460 volunteers assisting with general maintenance. The operating budget for these Clubs is likely to be no more than £750 per annum on average giving a total investment of £3.75million per annum.

64. In summary:

Area	Numbers Employed	Salaries	Operating Budget
Test Match Grounds [7]	35	£787,500	£647,500
First Class County Grounds [11]	33	£605,000	£467,500

Premier Clubs [280]	173	£3.500,000	£840,000
Local League Clubs	2300	£12,650,000	£3,750,000
Total	2541	£17.54million	£5.705million

65. In addition it would appear that more than 20,000 volunteers support grounds maintenance and development, a remarkable figure.

Tennis

66. Tennis has undergone a step change over the past 30 years with a significant decline in the number of available grass courts, and the conversion of clay/shale courts to limited maintenance artificial grass and acrylic and tarmac hard court surfaces.
67. The provision of high quality grass courts and tended surfaces are now provided at a very limited number of Clubs. Our sample is based on a very limited number of venues where high quality tournament provision is available.
68. At the All England Lawn Tennis and Croquet Club, 'Wimbledon', 14 full time staff are employed extending to 29 during the 'Championships'.
69. Beyond this there are c 20 major Clubs and tournament venues where permanent groundstaff are employed in a range from 1-5 full time equivalents. We took the norm to be 2 full time staff.
70. The salary range is quite wide from c.£12,000 to £35,000. We have worked to a norm of £20,000
71. This gives a total of 54 full time staff and a total salary bill of £1,080,000. We were not given information about total operating costs.

Golf

72. According to the English Golf Partnership there are 1,538 18-hole golf courses, 433 9-hole courses and 81 par 3 courses in England.
73. We studied Golf Benchmark Study 2007 www.golfbenchmark.com, a live hard copy and website research project undertaken by KPMG Consulting. The site contains extensive case studies on a worldwide basis with reports for individual countries. The Great Britain and Ireland Study is based on live returns from individual Clubs, approximately 650 in total.
74. The Report does not fully drill down into course management and maintenance but identifies that of the full time staff complement approximately one-third will be employed in this area. For an 18 hole course this equates to 5 FTE and for a 9 hole course 2 FTE. We do not have figures for par 3 courses. Salaries account for 38% of

total operating costs, of which approximately one-third relates to course maintenance. On this basis total salaries for an 18 hole course would equate to €304,000 (£227,000) of which one third would be €103,333 (c.£76,000). This would be reduced to c.£30,000 for a 9 hole course.

75. Operating costs for an 18 hole course equate to €800,000 (£597,000) of which 10-14% is allocated to course management and maintenance, a figure equating to £62,000.
76. The figures are halved for a 9 hole facility.
77. On this basis a summary position for golf is as follows:
- FTE employment at 18 and 9 hole Golf courses 8,556
 - Gross wage bill equivalent per annum £142,860,000
 - Course management and maintenance £108,779,000
78. In addition the KPMG study identifies approximately half of the courses surveyed (ie. 325) as intending to spend on upgrading the course and spending more on machinery. It is impossible to identify specific courses but as an estimate we have worked on the basis that 150 courses in England intend to upgrade. The average capital spend is €320,000 with €186,000 for machinery, a total of €506,000 (£377,000). This would represent a total investment of more than £56million on 18 hole courses alone.

Horse Racing

79. There are 52 racecourses in England according to the British Horseracing Authority and the Racecourse Association. Of these 21 specialise in jumps, 18 in flat racing and 13 offer both flat racing and jumps.
80. The British Horseracing Authority engaged Deloitte in 2006 to undertake an extensive (and expensive) study looking at the economic impact of horse racing in the UK. They looked at directly employed staff at racecourses, concluding that approximately 1,475 full time employees would be located across the 52 courses, but the study did not then drill down any further.
81. Consultation with the racing authorities suggests that a larger course will employ up to 10 full time staff dealing specifically with grounds management and maintenance, the figure reducing to 3 at a smaller course. These will be supplemented by casual labour around race days.
82. It would appear that a norm for courses is 5 full time employees for a jumps venue, 6 for a specialist flat racing course and 7 for a combined venue, a total of 304 in all for the racecourses in England.

83. The Racecourse Association has kindly offered to provide further information in terms of staffing and operating budgets but, based on industry salary data of an approximate average wage of £15,000 per annum, horse racing would have an FTE equivalent wage bill of £4.56million.
84. We are not in a position to extrapolate any further without additional data capture.
85. It is, however, worth noting that the Deloitte study identifies planned capital investment in track and grassed areas of £14million and £11million for 2007 and 2008 respectively.
86. Furthermore the study identifies £15million per annum capital investment for the past 4 years in formal grassed facilities associated with trainers yards.
87. In summary capital investment during the period 2002-2008 amounts to £85million.

Local Government

88. There are 388 local authorities in England. Gaining a comprehensive and accurate picture has proven very difficult; there are obviously major differences in each local environment but also very large variations in approach. Indeed, we have concentrated only on England because of the very different geography, climate and population density in Scotland, Wales and Ireland.
89. At a policy level there have been dramatic changes in the public sector 'landscape' during the past 5-10 years regarding the role played by local authorities in a number of service areas. These include:
 - A much more focused approach towards the fulfilment of statutory responsibilities, often driven by legislation and/or financial incentives. This now dominates the corporate agenda in most local authorities;
 - The diminution of sport and leisure, as a non-statutory function, where it does not play a significant role in the execution of statutory functions and/or the overall corporate agenda. The traditional parks, sport and leisure department is now normally part of a wider remit, sometimes housed in different sections or even different departments, often with limited priority. The period has also seen significant reductions in capital and revenue spending for sport in many authorities, although there are some beacons of best practice and investment;
 - A drive to provide significant evidence-based information to justify investment when resources are limited;
 - Enhanced targets embedded within local authorities Comprehensive Performance Assessment (CPA);

- Local authorities acting as enablers rather than deliverers; and
 - A revised management model whereby the client policy function is quite distinctively separate from parks, sport and leisure operations, which is now normally the responsibility of a private sector contractor or a leisure trust, the latter often emerging from the previous leisure services operation. Reducing levels of subsidy is a key feature of almost every contract.
90. On a practical level it has proven very difficult to differentiate between staff working on grounds management and maintenance, and those engaged in parks and gardens, open spaces and indeed general outdoor maintenance operations such as grass verge cutting. In many instances the roles have become blurred to a point where, in some authorities, grounds management and maintenance staff are in a category with waste collection and recycling and other general tasks. This issue is also one of concern to agencies who have a responsibility for parks, open spaces and horticulture.
91. Within the parameters of the research we have sampled a series of local authorities in terms of the grounds management and maintenance under their control (either directly or contracted out). There are significant variations even within the sample but in an effort to produce an overall picture we have extrapolated the data received as follows:
- 16,200+ natural turf playing surfaces (eg. pitch, court, green) under local authority control;
 - An average of 0.35 grounds staff employed per surface;
 - A total of c.5,750 staff employed by local authorities on specific grounds management and maintenance excluding parks and open spaces, an average of 15 staff per authority;
 - An average full time salary of c.£16,866;
 - An average part time salary of c.£8,060;
 - A total wage bill for local authorities in England of c.£86million per annum;
 - Operating budgets for machinery, products and training at a level of c.£149million per annum.
92. Our view is that these figures are conservative but data is scant and a larger sample would help confirm them (or otherwise).
93. We also observed wide variations in terms of the staff employed which is a cause for concern but requires further enquiry. For example, we encountered very low numbers of staff employed to tend a disproportionate number of pitches. We also found that in almost all authorities, grounds management and maintenance was not a priority and usually did not have officers of sufficient seniority and knowledge making the case when budget decisions were made.

94. We believe that National Governing Bodies of Sport and other interested organisations should be paying far more attention to the issue of quantity, quality and maintenance of playing surfaces in this sector in the short to medium term because expertise is declining, there is insufficient investment in maintenance and an eventual threat that surfaces will be closed on health and safety grounds.
95. One senior local authority officer told us: "There is a shortage of trained, skilled staff to work on fine turf surfaces, some of our expert staff are approaching retirement age, and there is nothing in place to fill the void. We are investigating the possibility of fine turf apprenticeships, but at this time it is not easy to allocate a full time wage for the sufficient number of staff required to run the apprenticeship scheme at a local college while the apprentice is effectively working on our grounds three days a week."

Higher Education

96. According to the survey of Higher Education Facilities in England there are 98 Universities and Colleges providing 932 winter pitches at 137 locations and 284 summer pitches at 99 locations. 74 grass and 541 hard tennis courts are also provided. Grounds management and maintenance is contained within a support staff section but there is no direct mention of the function.
97. Our sample was quite wide ranging with 2-4 grounds management and maintenance staff being the norm although a significant number now used contractors and staff, usually based in an estates department, also often had other duties.
98. If the complement averaged out at 3, it comprised a Head Groundsman on £20,000 per annum and two assistants at £15,000 per annum, giving an annual wage bill of £50,000. Across 98 institutions the total wage bill would be £4.9million pa.
99. We had limited success in obtaining operating budget information but were quoted £30,000-£35,000 in a very small sample. If these figures are correct and extrapolated across the 98 eligible institutions, a figure of £2.94million - £3.43million is the annual operating cost.

Independent Schools

100. There are over 1,500 independent schools in England providing education from primary through to sixth form study. For the purposes of this report we placed a focus on approximately 220 schools in membership of the Headmasters' and Headmistresses' Conference. Within this group are almost all of the most well known independent schools in the country and almost all have extensive high quality sports facilities, playing fields and associated grounds.

101. Grounds management and maintenance staff also appear to be more respected in this area and this is reflected in salary levels, associated benefits and budgets for operations and training.
102. From our sample a Head Grounds Manager would typically earn £30,000 per annum, have a nominated deputy earning £20,000 per annum and three further groundsmen averaging £15,000 per annum giving a total salary bill of £95,000 per annum.
103. An annual operating budget is likely to be £100,000 and there will be some provision for training c.£2,000.
104. In total it would not be unusual to find an overall spend of £197,000.
105. Across 220 schools the picture would be as follows:
- Numbers employed 1,100
 - Annual expenditure £43,340,000
106. In addition, in this area machinery is generally kept at a high specification and there will be a capital expenditure plan often extending over 10 years and potentially averaging £30,000 per annum. If this is taken into consideration, annual expenditure totals £6.6million or £66million over the 10 year period. This figure is not included in the generic totals.

Summary

107. In summary the sector at present looks as follows:

Sector Area	Numbers Employed	Salaries	Operations
Association Football	536	£10.08 million	£9.76 million
Cricket	2541	£17.54million	£5.705million
Rugby	129	£2.257million	N/A
Tennis	54	£1.08 million	N/A
Golf	8,556	£142.86 million	£108.78 million
Horse Racing	304	£4.56 million	N/A
Local Government	5,750	£86 million	£149 million

Sector Area	Numbers Employed	Salaries	Operations
Higher Education	294	£4.9 million	£3.1 million
Independent Schools	1,100	£20.9 million	£22.4 million
Totals	19,264	£290.18 million	£298.75 million
		£588.93 million	