

GREENKEEPING IN THE UK: WORTH £187m A YEAR

Key findings of the BIGGA/Golf Research Group maintenance survey show a number of surprises.

There was a fantastic response to the survey from greenkeepers all over the country, with just under 200 survey returns received and with a depth and quality of return that researchers have described as "excellent." With this number of completed questionnaires, it has been possible for the first time to produce statistically accurate figures for the size and nature of the UK greenkeeping industry.

The availability of these figures may well have a significant impact on the greenkeeping industry in this country. Whilst in America I undertook a very similar study in 1985 for the Golf Course Superintendents Association of America (GCSAA). The effect of this work in the USA has been considerable. This survey for the first time showed the sheer scale of the American greenkeeping industry: over \$2 billion annually. Superintendents and the greenkeeping industry generally became marked for respectful treatment when it became known how large their business had become.

Secondly, the publication in the States of standardised 'average' greenkeeping budgets had a significant effect. Prior to the survey there were about as many charts of accounts for greenkeeping budgets as there were golf courses, though afterwards the standard budget, hammered out so carefully for the survey, was increasingly adopted as the uniform budget for American superintendents. Further, with these 'average' budgets figures now available, the American superintendents had a firm ruler by which to measure their own operations and a strong tool assisting them when pressing home budgetary requests.

A strong indicator of the success of this first US maintenance survey is the subsequent establishment by the GCSAA of a whole department which today does nothing else save producing a whole series of surveys of the American greenkeeping industry, these surveys being continually updated.

This diversion across the Atlantic is useful in setting the scene for the BIGGA maintenance survey and gives an indication of the considerable effect this work may have on the UK greenkeeping business.

The UK survey shows the UK greenkeeping business to be of a considerable size, worth £187million annually and employing over 10,000 people. Labour is the largest single component of this expenditure, accounting for £92million annually. Capital spending is the

second largest item accounting for £36million. Two thirds of this spending goes on new machinery, one third on course projects such as extending tee boxes and re-laying greens. In fact, the amount spent on course projects is likely to be somewhat higher as the labour for these projects is not always properly accounted, the work simply being added to the duties of the regular green staff.

Looking at the use of chemicals, golf comes out looking very 'green'. On average a golf course spends £16 per acre per year on chemicals (pesticides and fertilisers) whereas arable agriculture spends £75. This is a very important area indeed, one where golf can say it is environmentally friendly – all the more important in the current climate when new golf development is increasingly under attack as being evil incarnate.

Parkland courses spend less on maintenance than heathland or links courses

The UK average for a golf facilities maintenance spending is £95,000 per year. Labour is the largest item, accounting for just over half of the money spent. Clearly there is considerable variation around this average in the maintenance spending by individual courses.

Facility size is the most obvious impact on maintenance spend. While 18 hole courses average £94,000 per year, 9 hole courses average £45,000 and 36 hole courses average £145,000. Looking at these figures on a cost per hole basis, 36 hole courses spend £4,000 per hole per year whilst 18 hole courses spend £5,200. This certainly does not mean the 18 hole courses are better maintained than the larger facilities, for if anything the reverse would be true, with many of the larger facilities being prestige courses. Rather, the lower maintenance spend per hole at larger facilities is an indication of economies of scale. For example, a 36 hole course does not need twice the equipment inventory of an 18 hole course, nor does it require two course managers.

Probably the most surprising finding of the survey is that parkland courses spend less on

maintenance than heathland or links courses. It has always been thought that parkland courses were the most expensive to maintain. Often termed 'grass factories', their often heavy soils tend toward the robust fast growing weed grass *Poa annua* and rye grasses that need twice as much mowing as the natural fescue and bent grasses used on heathland and links courses.

The survey shows 18 hole parkland courses spending £90,000 annually on maintenance, while links and heathland spend £100,000 and £115,000 respectively. This apparent anomaly may be explained by the preponderance of premium, better manicured courses on heathland and links.

Do customers get value for money when they pay high green fees? Comparing maintenance budgets to cost of play suggest that they do. Courses charging over £25 for a round spend twice as much on maintenance as courses charging less than £10. Comparing the budgets the most notable difference is the wage bill: keeping the top end courses manicured is very labour intensive.

Looking at the average maintenance spend, by region, for 18 hole courses, not surprisingly the South East appears as the most expensive, spending on average just under £140,000 per course. Scotland is the least expensive spending just half of the South East figure. A small part of the difference in the figures between Scotland and the South is due to labour rates, however the South spends more across all budget categories, which leads to the conclusion that the large difference in budgets is mostly due to the difference in philosophy of the game. The Scottish courses are closer to the natural environment whilst the Southern courses are increasingly man-made. As a result of the significant difference in maintenance operations in each region, two thirds of the report summarising the findings of the survey is given over to presenting results individually for each region.

The report, 'Golf Course Maintenance In The UK', is available for £70 (£40 to BIGGA full greenkeeper members) by sending a cheque payable to the Golf Research Group, located at LSE, 406 St Clements Building, Houghton Street, London, WC2A 2AE (071-9557721). BIGGA members enjoying their substantial discount over non-members will, for £40, obtain a piece of market research that would cost £50,000 if commissioned by a single user.

● The author, Colin Hegarty, conducted the survey on behalf of the Golf Research Group.