

Benchmarking Security and Stewarding Resourcing

Report of findings February 2017



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Introduction

The Security Industry Authority (SIA) regulates over 300,000 individuals in the private security industry and issues over 100,000 licences per annum. This is administered by an organisation of around 200 staff at an annual cost of approximately 26 million pounds. Any resource surplus from fee income passes to the Home Office, and is surrendered to Her Majesty's Treasury (HMT), except where there is agreement that it be retained by the Home Office. The SIA receive capital grants from the Home Office for investment, for example in I.T. infrastructure and office space. Recent research into the availability of SIA licence holders and the forecasts that accompanied it make for some pessimistic reading for the event security industry. Since its creation in 2003, the SIA has brought coherence and control into a relatively high-risk operating environment. There is significant evidence that demonstrates impact of the SIA; for example, over 55,000 people have had applications refused or revoked since its conception. Pessimistic forecasts for annual renewals of licence holders highlight a significant downward trend with an estimated reduction of 25/30% over a ten-year period from 2009 to 2019 (actual v forecast 2009/2019). This predicted fall in licence holder renewals will be a concern for the SIA, but it should also be a concern to both those who stage events and those businesses that supply the security staff to ensure they are both successful and safe.

Other interested parties include the UK government and major sports and event promoters. Given the ongoing heightened security threat levels, the traditional government security services are heavily supplemented by private providers. With the capacities of the Premier League stadia ranging from the low twenty thousands to seventy five thousand, the impact of diminishing numbers of trained security personnel could be dramatic.

This report highlights the outcomes of a survey, commissioned by the Football Safety Officers Association (FSOA) and the UK Crowd Management Association (UKCMA), which sought the views of industry professionals in order to benchmark any issues related to the predicted decline in the availability of appropriately trained personnel within the event security industry.

Executive Summary

A recent report has predicted a potential fall in annual renewals of licenses. The wider event security, safety industry and potentially national security capabilities could also be impacted by the loss of such significant numbers of appropriately trained personnel. This study sought the views of both suppliers and purchasers of event security and safety, on a number of matters relating to staffing requirements, availability and training.

Representations were obtained from a broad spectrum of the industry with significant experience. The majority (70%+) of respondents had over ten years' experience of the industry and in the case of some purchasers, managed venues with a capacity exceeding 50,000.

Of the purchaser respondents, 98.2% confirmed that their venue operated under a licence and 74.2% advised that this stipulated specific stewarding/security standards. When requested to identify qualification requirements, most (83.9%) identified NVQ L2/L3 Spectator Safety (fuelled by the non-availability of other qualifications), while 67.3% identified an SIA licence, which if the forecast fall in SIA licence renewals are accurate, could present some problems for the industry.

Given the importance of qualified staff, respondents were asked what percentage of staff are fully qualified during a typical event day. Many purchasers (43.8%) consider more than 80% of staff to be fully qualified for their roles at a typical event, but a significant number (56.2%) consider that the number of fully trained personnel is below this level.

Almost 40% of purchasers left the checking of qualifications to the suppliers and identified this as vital consideration, surpassed only by reliability when asked about the selection of external suppliers. The suppliers, on the other hand, appear to believe that personal relationships and trust were the vital selection criteria.

Both respondent groups identified difficulties in retaining appropriately trained staff, but the suppliers group felt this to be a bigger problem than the purchasers. Pay, the casual nature of the workforce and the availability of trained staff were cited as the top three issues.

The study asked respondents what their own organisations were spending on training and revealed that many were spending in excess of £20,000 each year. In the case of the suppliers, this was reported by over a quarter of respondents. This cost seems to be largely funded from internal budgets, particularly in the case of suppliers, but both groups identify a shortfall in training expenditure.

Many see that the current spend either does not meet or only partially meets the requirements and in an attempt to identify ways in which to address this issue, asked what solutions might be available. Over half of both groups felt that there should be alternatives to the current qualifications offer and emphatically backed the need for additional funding. Amongst the suppliers, there was also some support for qualifications to be achieved in a shorter time period in conjunction with an updated revision in content and a change in industry standards.

Based on the survey results, it does seem likely that, without intervention, the forecast fall in SIA licence holders will become a reality. Given that the industry is already struggling to recruit appropriately trained personnel, the impact of this could be dramatic for the events industry. Current venue licences stipulate the need for trained personnel and these may not be available.

In addition, the industry seems to be struggling with financial viability which is impacting on pay and training budgets. Both of these appear in the six key themes identified as contributors to staffing difficulties: pay rates; irregular work patterns; the casual nature of the workforce; competition; the cost of qualifications; and the availability of qualified staff.

Finally, the industry perspective on the future indicates that both suppliers and purchasers foresee increasingly difficult times ahead.

Methodology

The survey used an online questionnaire to obtain the views of both suppliers and purchasers within the event security industry. Questions collected both qualitative and quantitative data and were grouped to allow the collection of views from both the supplier and purchaser perspectives.

Findings

Respondents

There were almost 200 respondents to the survey (Suppliers n=91 and Purchasers n=101) with a broad range of roles across the industry.

Looking initially at the type of events with which respondents were involved (Table 1 and

Table 2), we can see that both groups are representative of the industry and could provide comment on a broad range of event activities.

Table 1 - Analysis of Purchasers Business Activities

	Main Function	Often	Rarely	Never
Exhibitions/Conferences	10%	29%	20%	7%
Corporate	8%	37%	13%	6%
Brand Experiences	2%	17%	20%	9%
Live Music Indoor	14%	13%	22%	7%
Live Music Outdoor	13%	20%	22%	16%
Local Authority	9%	20%	12%	16%
Licensed Trade	9%	18%	16%	9%
Sporting Events	61%	13%	8%	3%

Table 2 - Analysis of Suppliers Business Activities

	Main Function	Often	Rarely	Never
Exhibitions/Conferences	8%	34%	37%	7%
Corporate	8%	47%	31%	3%
Brand Experiences	3%	19%	42%	15%
Live Music Indoor	22%	43%	16%	5%
Live Music Outdoor	30%	49%	12%	3%
Local Authority	15%	47%	20%	6%
Licensed Trade	29%	26%	21%	9%
Sporting Events	41%	41%	9%	2%

Further confidence in the study can be gained through the responses to questions related to the years of experience and length of time in current role (

Table 3 and

Table 4).

In both groups, the majority (Purchasers 44.9% and Suppliers 41.7%) of respondents had been in their current role for in excess of ten years and had over ten years' industry experience (Purchasers 74.5% and Suppliers 74.1%).

Table 3 - Length of Time in Current Role

	Purchasers	Suppliers
<1 Year	9.2%	7.1%
1 - 2 Years	8.2%	13.1%
3 - 5 Years	21.4%	22.6%
6 - 10 Years	16.3%	15.5%
>10 Years	44.9%	41.7%

Table 4 - Total years of Industry Experience

	Purchasers	Suppliers
<1 Year	2.1%	2.4%
1 - 2 Years	0.0%	4.7%
3 - 5 Years	4.3%	9.4%
6 - 10 Years	19.1%	9.4%
>10 Years	74.5%	74.1%

Analysis of the final two questions in this section, specific to the Purchasers group only, provide additional confirmation of the industry knowledge and understanding underpinning further responses (

Table 5 and

Table 6 - Average Audience for Venue). 72.1% of respondents work at venues with a capacity above ten thousand and 55.5% consider an average attendance to be above this figure.

Table 5 - Capacity of Venue

Capacity	Response
< 5,000	12.9%
5,001 - 10,000	15.1%
10,001 - 20,000	22.6%
20,001 - 50,000	31.2%
> 50,000	18.3%

Table 6 - Average Audience for Venue

Average Audience	Response
<5,000	25.0%
5,001 - 10,000	19.6%
10,001 - 20,000	25.0%
20,001 - 50,000	20.7%
>50,000	9.8%

Staffing details

Given that 92.8% of Purchaser respondents confirmed that their venue operated under a licence or safety certificate and 74.2% indicated that this licence stipulated stewarding/security standards, it is not surprising that there is a clear need for trained security personnel.

Perhaps, because of the large number of Purchaser respondents associated with sporting events and support of the survey by the FSOA, the largest percentage of the respondents (83.9%) identified NVQ L2/L3 Spectator Safety as a requirement, while 67.3% identified an SIA Licence as a necessity.

Table 7 - Qualifications required

Qualification	Percent
AUSSIE	3.60%
NVQ L2/L3 Spectator Safety	83.90%
Event Security Operations (ESO)	8.90%
In-house Training (please specify below)	55.40%
Principals of providing security services	1.80%
SIA Licence	67.90%

A further question went on to ask what percentages of staff working at a typical event were fully qualified, working towards a qualification or not required to hold a qualification. The responses to this question show that many purchasers (43.8%) consider more than 80% of staff to be fully qualified for their roles at a typical event, a significant number (56.2%) consider that the number of fully trained personnel is below this threshold. While some identify that a qualification is not required (43.8%), many (79.3%) identify staff as working towards the required qualification.

Table 8 - Percentages of qualified staff at a typical event (N.B. Percentages do not total 100, as respondents may not have provided data in all categories)

Percentage of respondents	Fully qualified	Working towards	Not required
0 to 20%	6.3%	56.3%	33.3%
21% to 40%	4.2%	16.7%	4.2%
41% to 60%	10.4%	4.2%	0.0%
61% to 80%	35.4%	2.1%	6.3%
81% to 100%	43.8%	0.0%	0.0%

Interestingly, approaching 40% of purchasers left the checking of qualifications to the suppliers and the ability to supply appropriately trained staff was only surpassed by reliability, when purchasers were asked what was vital in the selection of external suppliers. This, however, does not seem to be recognised by the suppliers who appear to believe that personal relationships and trust were the vital selection criteria (

Table 9).

Table 9 - Vital criteria in the selection of external providers

Answer Options	Suppliers	Purchasers
Cost	31.3%	20.3%
Training qualifications of staff	32.8%	60.7%
Personal relationship/trust in management	69.1%	47.5%
Distance from venue	4.6%	8.9%
Reliability to supply	63.2%	71.2%
Historical use at venue	16.4%	6.8%

Staffing issues

When questioned on the degree of difficulty in maintaining staffing levels (Table 10), the majority in both respondent groups indicated that they felt there were some issues (Suppliers 21.1% and Purchasers 34.5%). However, when comparison is made of degree of difficulty experienced, there is a marked difference. If all responses between 0 (Difficulty maintaining staff) and 5 (Some issues) are combined, the overall percentage of supplier respondents rises to 61.4%, whereas the percentage of purchaser respondents rises by only 12.1% to 46.6%. This indicates that the supplier respondent's perception of the difficulties is greater than those of the purchaser respondents.

Table 10 - Perception of difficulty in maintaining staffing levels

Scale	Suppliers	Purchasers
0 - Difficulty maintaining staff	3.5%	0.0%
1	0.0%	3.4%
2	7.0%	1.7%
3	17.5%	3.4%
4	12.3%	3.4%
5 - Some issues	21.1%	34.5%
6	14.0%	12.1%
7	5.3%	6.9%
8	12.3%	17.2%
9	1.8%	10.3%
10 - Easily maintaining staff	5.3%	6.9%

Analysis of the open comments that were made to identify the causes of staffing difficulties reveals that there are six key themes: pay rates; irregular work patterns; the casual nature of the workforce; competition; the cost of qualifications; and the availability of qualified staff. However, whilst the same areas are identified by both respondent groups, there is no correlation in the responses (

Table 11).

Respondents in the purchaser group identify the casual nature of the workforce and the availability of trained staff as the biggest issues, while the supplier respondents identify these as pay and irregular work patterns.

Table 11 - Analysis of comments made to identify causes of staffing issues.

	Purchasers		Suppliers	
	%	Rank	%	Rank
Pay	22.2%	3	36.1%	1
Irregular work patterns	11.1%	4	27.9%	2
Casual workforce	33.3%	1	9.8%	4
Competition	5.6%	5	9.8%	4
Cost of qualifications	2.8%	6	3.3%	6
Availability of qualified staff	25.0%	2	13.1%	3

A combined ranking of this data identifies the following:

- 1 Pay
- =2 Casual nature of workforce
- =2 Availability of qualified staff
- 4 Irregular work patterns
- 5 Competition
- 6 Cost of qualifications

Training

Given the previously identified need for qualified personnel within the industry and the costs of providing this, it is not surprising that there are strong feelings in both respondent groups when it comes to training.

Over 25% of supplier respondents claim to be spending over £25,000 per year (

Table 12) on training provision and even in the lower-spending purchaser group, almost 12% claim to be spending these amounts.

Table 12 - Annual budget for training provision

Answer Options	Response Percent	
	Purchasers	Suppliers
<£5,000	73.8%	37.3%
£5,000 - £20,000	14.3%	37.3%
>£20,000	11.9%	25.5%

This cost of training appears to be largely funded from internal budgets and this is particularly the case for supplier respondents (Table 13). However, both respondent groups feel that there is a significant shortfall in training expenditure. In the purchasers group, 44.4% of respondent's feel that the current spend either does not meet or only partially meets the requirements (Table 14). In the supplier group, this figure rises to 65% with 21.1% claiming requirements are not met.

Table 13 - Sources of funding for training

Answer Options	Response Percent	
	Purchasers	Suppliers
Wholly from an internal budget	37.0%	48.3%
Partial funding	32.6%	31.0%
Wholly funded externally	17.4%	8.6%
N/A	13.0%	12.1%

Table 14 - Does the budget meet the current demands placed upon delivery?

Answer Options	Response Percent	
	Purchasers	Suppliers
Yes	44.4%	26.3%
No	24.4%	21.1%
Partially	20.0%	43.9%
N/A	11.1%	8.8%

Perhaps as a consequence of the large but ineffective spend on training, 50% of both purchasers and suppliers feel there should be alternatives to the current qualification offer (

Table 15). There was also a strong backing for additional funding with 87.5% of suppliers and 95.7% of purchasers supporting this statement. An additional question, posed only to suppliers, revealed that there was some desire (58.9%) for qualifications to be achieved in a shorter time period and 46.4% of them felt industry standards should be changed.

Table 15 - The quality of staff/service would improve if...

	Response Percent	
	Suppliers	Purchasers
There were alternatives to qualifications	50.0%	50.0%
There was more choice in external training providers	23.2%	39.1%
There was improved funding available for training	87.5%	95.7%
Qualifications were quicker to achieve	58.9%	N/A
There were changes to industry standards	46.4%	N/A

There was significant agreement when both groups were asked how improvement to current training methods could be achieved. Workplace assessments and online training delivery were strongly favoured (Table 16).

Table 16 - Would your organisation/venue benefit from...

	Response Percent	
	Purchasers	Suppliers
Upfront training and qualifications	48.8%	52.9%
Modulated training	48.8%	43.1%
Workplace assessments	63.4%	64.7%
Additional resources for delivery	51.2%	47.1%
On-line training delivery	61.0%	64.7%

Despite the growing financial burden of training provision, the industry appears to be reasonably committed to the Living Wage scheme. When asked about support for this scheme for in-house staff, 65.9% of purchaser respondents confirmed support. This dropped to 57.8% in relation to contracted in staff, which is slightly below the suppliers' response at 59.6%.

The Future

The final questions in the survey sought both respondent groups' views on the future, in terms of the:

- financial viability of events;
- recruitment of staff;
- quality of staffing;
- maintaining standards;
- availability of qualified staff;
- retention of qualified staff;
- influence of regulation;
- accessibility to funding; and
- attractiveness to work in the industry.

In each of these categories, respondents were asked to indicate whether they felt things would deteriorate, partially deteriorate, stay the same, partially improve or improve. The results of these questions are shown, as percentages, within Table 17 - The Future (Suppliers percentages) Table 17 and Table 18.

Table 17 - The Future (Suppliers percentages)

	Deteriorating	Partial deterioration	No change	Partial improvement	Improving
Answer Options					
Financial viability of events	15.8	52.6	12.3	10.5	8.8
Recruitment of staff	19.3	57.9	10.5	7.0	5.3
Quality of staffing	24.6	49.1	12.3	7.0	7.0
Maintaining standards	10.5	28.1	38.6	12.3	10.5
Availability of qualified staff	19.6	51.8	12.5	10.7	5.4
Retention of qualified staff	15.8	38.6	24.6	10.5	10.5
Influence of regulation	10.7	26.8	44.6	10.7	7.1
Accessibility to funding	41.1	28.6	17.9	7.1	5.4
Attractiveness to work in the industry	33.3	36.8	14.0	7.0	8.8

Table 18 - The Future (Purchasers percentages)

	Deteriorating	Partial deterioration	No change	Partial improvement	Improving
Answer Options					
Financial viability of events	8.7	32.6	39.1	13.0	6.5
Recruitment of staff	13.0	41.3	39.1	4.3	2.2
Quality of staffing	6.5	32.6	41.3	17.4	2.2
Maintaining standards	6.7	26.7	37.8	22.2	6.7
Availability of qualified staff	17.4	45.7	23.9	8.7	4.3
Retention of qualified staff	13.0	50.0	28.3	6.5	2.2
Influence of regulation	6.7	22.2	60.0	11.1	0.0
Accessibility to funding	48.9	35.6	11.1	4.4	0.0
Attractiveness to work in the industry	15.2	39.1	32.6	8.7	4.3

Analysis of this data, using a polarising approach of grouping together partially deteriorate/deteriorating and partially improve/improve while ignoring the no change views, reveals that both respondent groups have a more negative view of the future in all categories. Both respondent groups identified issues with the future financial viability of events (Suppliers 68.4% and Purchasers 41.3%) and indicated a negative view of their ability to recruit and retain appropriately qualified staff. Although, there were no questions to identify the root cause of this pessimism, both respondent groups identified a deteriorating view in respect of accessibility to funding (Suppliers 69.6% and Purchasers 84.4%).

This report was concluded before the terrorist attacks in Manchester and London where there was an immediate upsurge in demand for security personnel. It is clear that resources do not exist in sufficient numbers and quality to meet the ongoing and increased demands catalysed by terrorist activities.

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