



The Horticulture, Landscaping and Sports Turf Industry in Great Britain

Size, Structure and Skills

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2011

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Executive summary

The value of our nations' green spaces and sports grounds is becoming increasingly important to both politicians and the general public. As part of Lantra's research strategy, this project identifies the skills needs and challenges within the horticulture, landscaping and sports turf industry and provides robust labour market intelligence (LMI) on skills issues within these industry groups. We have gathered both quantitative and qualitative information on businesses and employees in the horticulture, landscaping and sports turf industries. In particular, the research gauges the size, structure, workforce characteristics of the industries, and identifies those businesses and employees that may be 'hidden' and so do not appear in Standard Industrial Classification (SIC) codes licensed to Lantra. Such businesses are often contained in a SIC (2007) code for another sector or another industry group within Lantra's footprint.

The horticulture, landscaping and sports turf industries are diverse, and defined by Lantra to include: hard, soft and interior landscaping, sports turf and golf green-keeping, private, heritage and botanic gardens, commercial grounds, public parks and green spaces. The industry as a group is sometimes known as amenity horticulture.

Over the next few years, the Government plans to increase the understanding of the value of the natural environment to society and the economy. This places the nation's parks and gardens directly in the public eye in terms of reconnecting and promoting the value of the natural environment. The industries are therefore important in terms of promoting the health and well-being benefits of engaging people in nature and importantly, it highlights the shift in policy to active engagement and involvement of individuals in their local parks and gardens.

The research was completed using a mixed methods research methodology. Lantra contracted an independent consultant, Cognisant Research, to quantify the hidden workforce and generate LMI on skills gaps and skills needs. Lantra however supplemented this quantitative exercise with interviews to qualify findings and add further insight.

Indicatively, we estimate that the number of primary businesses operating within the horticulture, landscaping and sports turf industry is 18,000, a seven fold increase compared to previous estimates. When estimating additional businesses that employ relevant occupations, estimates show between 29,000 and 65,000 businesses. Our estimates of the size of the hidden workforce indicate that previous figures were under estimates: some 189,000 workers are identified in horticulture, landscaping and sports turf occupations (161,000 to 217,000 at a 95% level of confidence). In general, these estimates of the unrecognised horticulture, landscaping and sports turf industries are subject to large statistical variation.

Our research has uncovered encouraging signs for recruitment opportunities in the industries, with a net gain of the number of people working in the industries over the past 12 months. Hard-to-fill vacancies (HtFV) are particularly prevalent, with some 25% of all vacancies identified as being HtFV. This makes the level of HtFV higher than the broader land-based sector.

Nearly two-thirds of respondents thought they did not need to improve the skills of their business, with management skills not seen by many to need improvement. A third of respondents also stated that they did not train their workforce. However, many businesses did recognise the benefits of training to be increased productivity and morale, with only 8% believing that there was no benefit. A total of 58% of respondents cited lack of funds and costliness as the main barrier to training alongside not being able to spare staff time (36%). This shows that businesses would like to train their staff, but there are significant barriers to doing so. There is support for continuous professional development (CPD), with over half of respondents stating they would support an industry run scheme.

Qualitative research identified skills gaps in the workforce as being practical skills, literacy and numeracy, and higher-level academic skills as the profession becomes more and more scientific. Another common skills gap in the workforce was management and supervisory skills among more experienced staff. This is in contrast to some of the quantitative findings, which suggested management skills are not seen by employers to need improvement.

Information technology was seen to be a key driver within the industries, alongside greater public engagement, pesticide changes, and the need for greater business and commercial acumen to generate new income streams with amenity horticulture. More help for career changers was generally welcome, as they are a key way of increasing higher-level management skills in the industry.

A series of recommendations were developed as a result of the research, which are as follows:

- Disseminate clear, up-to-date information about career entry, progression and professional development opportunities for potential and recent entrants into the industry
- Promote training and development in public engagement by, for example, sharing best practice among and between large employers such as Local Authorities and museums
- Further promote skills, training and CPD for horticulture, landscaping and sports turf job roles identified within other sectors, particularly among large employers
- Address the principal barriers to training and upskilling of expense and time, by introducing more flexible courses that can be accessed at affordable prices
- Alternative routes to higher-level qualifications (e.g. higher apprenticeships) should be explored, to encourage more entrants with higher levels of literacy and numeracy skills
- Implement a CPD framework where more flexible provision can contribute to while creating better opportunities for progression. This may also lead to an increase in availability of job-specific technical training as more training is recorded
- Promote training and development in new areas in terms of generating alternative income streams for parks services, including negotiation and communication skills
- There is a need to develop career progression pathways within the sector, in particular highlighting areas of overlap and transferrable skills across land-based and environmental sectors to encourage career changers. More funding should also be made available for training older entrants

1 Introduction

Lantra is the Sector Skills Council (SSC) for the land-based and environmental industries. The land-based and environmental sector is complex and diverse, covering a range of sub-sectors across the UK. Businesses in the sector enhance the quality of life for every man, woman and child. Lantra's Strategic Plan sets out the organisation's priorities, underpinned by research and LMI. Lantra's official licensed 'footprint' covers 17 industries, including the horticulture, landscaping and sports turf industry. The horticulture, landscaping and sports turf industry in England, Scotland and Wales (GB) have been identified as a research priority this year (2011). This research was undertaken alongside research into the environmental conservation industry and the trees and timber industry.

By producing robust LMI on skills issues within this project, we will achieve the aim of identifying the skills needs and challenges within the horticulture, landscaping and sports turf industry. The scope of the research is also to look at industry specific skills and training issues and identify evidence of cutting edge practices. All Lantra industries in Northern Ireland were the subject of primary research in 2010 and were therefore not included within this project¹. As this primary research did not look at hidden job roles within other SIC codes, we cannot compare like for like for Northern Ireland in this report and therefore it is not included. We set out to gain both quantitative and qualitative information on businesses and employees in the horticulture, landscape and sports turf industries. In particular, the research will gauge the size, structure, workforce characteristics of the industry and identify those businesses and employees that may be 'hidden', i.e. are not identified using Lantra's current licensed SIC codes.

Lantra conducted qualitative focus groups and in-depth interviews in the sector alongside a contextual review of the industries. This supplements the primary data gathering and analysis, which was undertaken by Cognisant Research (Cognisant). Cognisant gathered LMI that gauged the size, structure and workforce characteristics of the industries, as well as identifying skills, recruitment and training issues. The LMI gathered by Cognisant was supplemented by the skills and business needs document by the Industry Partnership Manager (IPM) for horticulture, landscaping and sports turf in consultation with the industry group (IG²).

Chapter 2 sets out the economic and policy context underpinning the findings of the research. Chapter 3 sets out the methodology used, and Chapter 4 presents estimates of the size of the horticulture, landscaping and sports turf sector including hidden workers. Chapter 5 presents more general LMI on skills gaps and training needs and we conclude in Chapter 6 and make a series of recommendations.

¹Primary research for the Northern Ireland-DARD Survey 2010.

²Lantra's Industry Group are representative bodies of industry specialists incorporating employer, training and education organisations and trade bodies.

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2 Context

The horticulture, landscaping and sports turf industry, sometimes referred to as amenity horticulture, includes the following industries as defined by Lantra:

- Hard, soft and interior landscaping
- Sports turf and golf green-keeping
- Private, heritage and botanic gardens
- Commercial grounds i.e. where the space is used for generating a financial profit (e.g. golf course)
- Public parks and green spaces.

In most cases, an industry can be classified (or defined) by SIC codes. The Office of National Statistics (ONS) provides data for 'landscape service activities' SIC code (81.30). However, Lantra's horticulture, landscaping and sports turf industry are spread across more than 50 different SIC codes, so using just one SIC code greatly underestimates the size of the industry. Historically, to provide national and regional business and employment estimates that more accurately represent the horticulture, landscaping and sports turf industry, data for 'garden design', 'water garden services' has been sourced from Experian and added to the ONS data in order to produce a Lantra estimate, and to provide an estimate for the UK overall we have used ONS data, Experian data and CABA Space³ estimates for Local Authorities. For this research we have used a different method to ascertain the size of the industry. This is detailed in the Methodology section of this report (Chapter 3). Meanwhile, this chapter outlines some of the context surrounding this particular study.

The most important policy that relates to the horticulture, landscaping and sports turf industry in Great Britain is the 'Natural Environment White Paper'.⁴ This policy outlines the Government's plans for the natural environment over the next few decades by increasing the understanding of the value of the natural environment to society and the economy. This places the nation's parks and gardens directly in the public eye in terms of reconnecting and promoting the value of the natural environment. The horticulture, landscaping and sports turf industry are important in terms of promoting the health and well-being benefits of engaging people in nature. Importantly the policy highlights the shift towards active engagement and involvement of individuals in their local parks and gardens.

³ Commission for Architecture and the Built Environment (2009): Grey to Green.

⁴The Natural Choice: securing the value of nature (2011) www.official-documents.gov.uk/document/cm80/8082/8082.pdf

The rhetoric of the Natural Environment White Paper is driven to a great extent by the climate change agenda. Active management of the natural environment can underpin many facets of a low carbon economy and mitigate the impact of climate change as green spaces in urban areas also absorb carbon. Research funded by the Horticultural Trades Association⁵ highlights that planting in urban areas absorbs more carbon, reduces the urban heat island effect and can reduce the summer energy load on buildings by 20% to 40%. The Commission for Architecture and the Built Environment (CABE) argues⁶ that shifting public spending from grey projects (like heavy engineering projects), to green schemes, like street trees, parks, green roofs and waterways, will have a range of environmental, social and economic benefits, thereby contributing to a low carbon economy. The green infrastructure partnership has been established as part of the natural environment white paper. The partnership aims to generate more green space in England's towns and cities by assessing the condition of existing green infrastructure, investigating scope for improvements, consider how best to support communities, planners and decision makers can be supported to encourage better green infrastructure, and demonstrate and quantify benefits.⁷

2.1 Public perception and importance of green spaces

Public perceptions about green spaces have been improving. In a recent survey undertaken by the Horticulture Trades Association (HTA), 92% of people surveyed felt it was important to have flowers, shrubs and trees grown in built-up areas, and 17% of people said they recognise the benefits of growing plants in the built environment, compared to only 9% four years ago.⁸ The increased demand for more green spaces in towns has increased the autonomy of the landscape gardening industry along with the restoration and conversion of non-functional parks. New developments in the industry include working with smaller areas, 'age-related' gardens⁹, 'sensory gardens'¹⁰, highly specialised techniques, new materials and stricter laws for nature and environmental protection.

5 Horticultural Trades Association (2009) Greener Planting, Greener UK.

6 Commission for Architecture and the Built Environment (2009): Grey to Green.

7 www.defra.gov.uk/news/2011/10/11/more-green-spaces/

8 Plant for life; Autumn environment report, HTA, 2010.

9 These take into account the needs of older people such as stable handrails, secure steps and stairs and elevated flower beds to make plants accessible.

10 Trend area where gardens stimulate the sight, smell and touch senses and health-orientated gardens incorporate the need for peace and movement as well as aesthetic and health aspects in plants.

The increasing importance of the sector both politically and socially means that it is also increasingly important to ensure the sector has all the right skills to deliver the best service both to the public and also to the environment itself. Some evidence of skills issues in the sector are as follows. The paper 'Parks need people: the skills shortage in parks'¹¹, reported that skill levels are generally low at all levels in the sector; 72% felt they would benefit from training, and a lack of support and Local Authority commitment were the most frequently cited obstacles to improvement. The 'Cultivating skills in historic and botanic gardens'¹² report highlights the increasing shortage of vital skills in the industry, challenges associated with the ageing workforce and difficulties around finding and helping to fund training. Key issues highlighted by the report include:

- Training for the over-25s: almost half of the sector's recruits are forging second careers, however funding is heavily focused upon under-25s
- Reviewing existing programmes: existing apprenticeships need to be reviewed and enhanced and new courses and training developed
- Improving qualifications: simplify qualifications and increase flexibility
- Developing management training schemes: improve and enhance development schemes for managers at all levels
- Careers and image: the sector offers varied careers involving a range of skills and therefore careers, progression routes and flexible approaches to training are a priority.

CABE Space research into skills¹³ covers the green space sector in England and includes information on skills gaps and shortages, sets a baseline to measure the impact of skills improvement initiatives and identifies the priority skills required in the sector at various levels. The report also covers training and skills, highlighting that the most common barriers to training were cost and time, and skills gaps included marketing and promoting sites, planning, design and managing for sustainability and climate change, information technology (IT), professional skills and networking.

A Review of the Provision of UK Horticultural Research and Development for the National Horticulture Forum¹⁴ advises that the skills deficit in horticultural research and development needs to be addressed by supporting short-course training in aspects of practical horticulture and that several traditional skills are in short supply, such as agronomy, plant pathology and weed science. Water and pesticide use are common to the production and amenity sectors as are staffing and skills issues, increased application to horticultural research and development of less traditional skills such as economics, environmental science and the nutritional qualities of fresh produce. At this higher level there are reports of recruiting technical staff with relevant skills and knowledge of practical horticulture. Raising the profile of horticulture and 'green skills' as a career for young people and the needs of volunteers are also highlighted as areas for skills development.

¹¹Parks need people: the skills shortage in parks, 2004. GreenSpace and the Parks Agency.

¹²Cultivating skills in historic and botanic gardens, English Heritage, December 2005.

¹³ CABE Space Green Space Skills National employer survey findings, 2009.

¹⁴ A Review of the Provision of UK Horticultural R and D for the National Horticulture Forum. Brian Jamieson and Associates, August 2008.

Horticulture, landscaping and sports turf is also reliant on volunteers, and even though they are not part of the formal LMI in the traditional sense, their skills are still very important to the delivery of parks, gardens and other green spaces. CABE Space research¹⁵ highlights the importance of volunteers to the sector, with the organisations surveyed employing a total of 39,000 volunteers who perform approximately 164,000 working days per year (equivalent to 683 full-time staff and £7.1 million per year).

The London Parks and Green Spaces Forum advocate that in London, organisations who manage green spaces would welcome an increase in public participation by local people. For example, 97% of landowners want to expand volunteering on their land and 90% of health organisations want to be linked with green space volunteering opportunities. However the report does highlight some issues regarding the processes and procedures in place to monitor, improve and engage with volunteers strategically.

¹⁵ CABE Space Green Space Skills National employer survey findings, 2009.

3 Methodology

A mixed methods research methodology was followed in this research project. Firstly, Lantra contracted an independent consultant to quantify the hidden workforce and generate LMI on size, structure, workforce characteristics and skills issues. A questionnaire was then produced to collect workforce data (see Appendix 1). Cognisant then briefed the telephone interviewers to support their understanding of the project and the questionnaire. The telephone interview process then took place over a six week period (2 June to 21 July 2011). This interview work was supported by our research partner, Research and Marketing Group (RMG). Lantra supplemented this quantitative exercise with focus groups and interviews to qualify findings and add further insight. The detail of each of these stages is provided below for transparency.

3.1 Understanding the 'hidden' workforce

The SIC 2007 code for the horticulture, landscape and sports turf industry is identified in Table 1 below.

Table 1 – Horticulture, landscape and sports turf industry SIC 2007 code

SIC	2007 Description	Lantra industry
81.30/0	Landscape service activities	Horticulture, landscaping and sports turf

There are also a number of other businesses that employ workers in horticulture, landscaping and sports turf (HLST) related occupations. However, because of the SIC-focused method of identifying businesses relevant to the horticulture, landscape and sports turf industry, Lantra is concerned that the recruitment skills and training needs of workers operating in these roles, but in industries outside Lantra’s licenced SIC codes, has remained overlooked.

As the research needed to consider those industries most likely to include the 'hidden' workforce, businesses who were outside the SIC code in Table 1 but also employed a number of people in horticulture, landscape and Sports turf job roles were included for this research. Using a database of over 20 million job advertisements¹⁶ posted in the UK over the last two years, Cognisant worked with the Lantra research team to identify SIC codes most likely to recruit workers in horticulture, landscape and sports turf industry occupations.

¹⁶ Job adverts posted on online job boards and collated by Innovantage.

In order to make sure that the logic behind the sample selection was sound, the job roles highlighted were approved by the Lantra research team and the Industry Partnership Manager. This process yielded 60 SIC codes, the use of which is further outlined in the population and sampling sections below.

Job titles within 'secondary businesses' were used to capture people working in horticulture, landscaping and sports turf related roles. A full list of the job titles and SIC codes identified in this search can be found in Appendix 2. An illustration of type of employer and role is shown below:

- **Local authority:** Park Manager; Park Sub-contract Manager (Ground Maintenance); Park Strategy Officer; Park Operative; Sport Ground Co-ordinator
- **Contractors:** Ground Maintenance Landscape Operative, Gardening Operative
- **Private sports facilities:** Golf Course Manager, Head Green-keeper, Polo Ground Maintenance Worker
- **Other public institutions:** Caretaker and External Ground Keeper, School Gardener, School Gardening Co-ordinator.

Throughout this report, businesses performing a function traditionally associated with horticulture, landscape and sports turf industry, given the SIC code in Table 1, are referred to as primary businesses. Secondary businesses are those often outside the licensed SIC code, but employing workers in horticulture, landscaping and sports turf related occupations. Combining both primary and secondary organisations gives us the overview of the horticulture, landscaping and sports turf industry.

3.2 Sampling

The target population is defined in Appendix 3. Having defined the target population, the sampling frame was based on the permutations of location, business size and SIC code but with the following groups used instead for location and employee size. The use of these groups presented a viable option in terms of sampling due to restrictions in project resources at the time of the study. Within each permutation a random sample was selected within each SIC code. In the case of the larger employee size bands, nearly all businesses were selected since there are not that many large organisations. In total, 6,758 businesses were included in the survey call list.

Table 2 below sets out the number of businesses contacted in the course of this project, as well as those confirming they were relevant to the horticulture, landscape and sports turf industry, in either a primary or secondary capacity. Of the 6,758 businesses contacted, not all were relevant as they did not employ anyone in a horticulture, landscaping and sports turf industry capacity. However, in order to ascertain this fact the respondent was still required to confirm the size and nature of their workforce. The table therefore lists the number of primary businesses contacted, defined as those in SIC codes traditionally associated with the horticulture, landscape and sports turf industry which include agriculture, trees and timber, horticulture, landscaping and sports turf, aquaculture, fisheries management, and game and wildlife) and any other business or organisation (e.g. schools, Local Authority).

Table 2 – Horticulture, landscaping and sports turf industry sample frame

	England	Scotland	Wales	Total
Primary target	384	129	229	742
Primary achieved	31	29	29	89
Secondary Lantra	1,099	625	348	2,072
Secondary Lantra achieved	21	9	15	45
Secondary all other	1,629	1,221	1,090	3,940
Secondary achieved	44	43	20	107
CI @ 95%	17%	30%	30%	15%

The overall response rate was 15%, which is extremely good for a telephone survey. There was a variation in that primary businesses were more responsive than secondary businesses. The confidence level of each nation is set out above¹⁷. It shows that there is a 95% chance that the data collected for the horticulture, landscaping and sports turf industry, overall, is accurate ±15%. This confidence level applies to all data that is reported at the overall level. Where data is referred to at the national level, the confidence levels set out in the table above should be referred to. A full explanation of the estimation method used in calculating the businesses and employee numbers can be found in Appendix 4.

3.3 Questionnaire design

Cognisant worked with the Lantra research team to produce a questionnaire script for telephone interviews (see Appendix 1). The questionnaire was partially based on previous questionnaire work undertaken by the Lantra Research Team in order to provide comparative data. Lantra then included the IPM in producing the final questionnaire for this project. Cognisant then collated the versions to produce a final version, which was suitable for a 15-minute interview. Cognisant then processed and analysed the collected data.

¹⁷ Confidence Intervals (CI) and confidence levels are statistical measures of accuracy. This report refers to confidence levels of a certain per cent and a Confidence Interval of 95%. If the confidence level is 15% then the statistic is considered accurate within 15%, 95% of the time.

Cognisant briefed interviewers so they understood the background to the project before conducting interviews. Central to this briefing was the importance of identifying the specific job roles within each target business. Traditionally, LMI research of this kind has focused solely on businesses operating within Lantra licensed (primary) industries. However, for this project to be successful interviewers were required to consistently identify only the roles relevant to the Lantra industries under review: trees and timber, environmental conservation and horticulture, landscaping and sports turf. In some businesses, none or all of these occupations would be relevant. In addition to this complexity, Cognisant were calling businesses that had no previous knowledge of Lantra, making it far harder for them to see the relevance of their participation.

Interviewers were required to speak with individuals operating at a senior level within the business, or responsibility for training and development, in order to ensure the data gathered was fit for purpose.

3.4 Qualitative research

A series of interviews were undertaken between April and July 2011. This included consulting with individuals in England, Scotland and Wales, as well as representation of each sub-industry. As a result, both national and industry level priorities were accounted for. This qualitative work, which is presented in Appendix 5, adds in-depth information on skills gaps, as well as current and future issues affecting skills in the industry and has been incorporated into Chapters 4 and 5.

4 Exploring the 'hidden' horticulture, landscaping and sports turf industry

This chapter of the report presents estimates of the size of the horticulture, landscaping and sports turf industry workforce and business base including those outside the standard industrial classification for the industry, and explores workforce characteristics. The data set out in this chapter has the same confidence intervals described in Section 3.2 of this report.

4.1 Industry estimates

This section of the report considers the LMI captured for all the businesses operating in the horticulture, landscaping and sports turf industry. This data relates to the number of businesses and organisations operating in this industry, as well as the number of people it employs. Additional breakdowns are also provided, relating to the age, gender, ethnicity and employment status of workers in subsequent sections.

Traditionally, this data has focused solely on SIC codes licensed to Lantra. For the first time, this report covers the full scope of businesses and organisations operating across England, Scotland and Wales.

Across the three nations surveyed, a total of 189,465¹⁸ individuals were identified as working in occupations related to the horticulture, landscape and sports turf industry. These individuals were identified as working in 47,470 businesses¹⁹. Table 3 provides industry estimates by nation for workers and businesses. These figures include workers and businesses in both Lantra licensed (primary) and unlicensed (secondary) industries.

Table 3– Business and workforce estimates by nation in 2011²⁰

	Businesses	Workforce
England	40,799	160,880
Scotland	3,625	20,704
Wales	3,046	7,882
Overall	47,470	189,465

18 At the 95% Confidence Interval (CI) this estimate is accurate to 15%.

19 At the 95% Confidence Interval (CI) this estimate is accurate to 38%.

20 Lantra's Skills Assessment for Northern Ireland published in 2010 identified 780 businesses and 4000 employees working in the sector in 2010.

Businesses participating in the study were asked for the total number of people they employed. This number was used to define the size of the business. In total, just over half (54.7%) of all businesses identified as operating in the horticulture, landscape and sports turf industry were small businesses, employing one to four people. Small and micro businesses were the dominant feature of all businesses in this industry across each nation. Figure 1 sets out the proportion of businesses in each size category, while Table 4 sets out the estimated number of businesses by size band.

Figure 1– Businesses by size band (percentage of total)

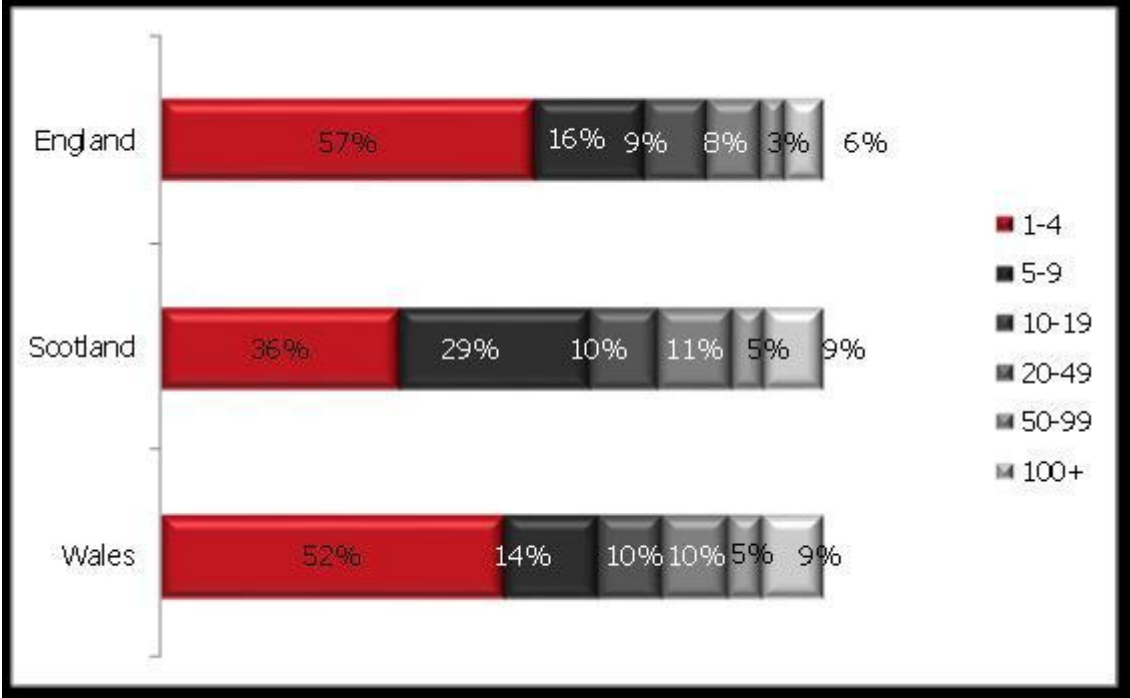


Table 4 – Total number of businesses by size band

	1-4	5-9	10-19	20-49	50-99	100+
England	23,077	6,686	3,844	3,415	1,389	2,389
Scotland	1,313	1,035	370	410	173	324
Wales	1,574	435	298	304	155	280
Total	25,964	8,156	4,512	4,129	1,717	2,993
Percentage of total	55%	17%	10%	9%	4%	6%

4.2 Estimates by primary and secondary classification

Overall, just 6% of the businesses identified as employing workers in horticulture, landscape and sports turf industry related occupations were classified in the primary category. This means that the businesses covered by the SIC code in Table 4 represent only a small fraction of the businesses and organisations employing people in horticulture, landscaping and sports turf industry roles. A full list of the SIC codes identified in the secondary unrecognised industries is set out in Appendix 6. These organisations included: Local Authorities, contractors, parks and gardens, hotels, construction companies, camp sites and universities.

The estimated number of businesses classified as primary and secondary is set out in Table 5 below split by nation. As can be seen just a small proportion (6%) of businesses can be classified as primary with the majority of businesses being classified as secondary.

Table 5 – Number of businesses across primary and secondary SIC codes

Country	Businesses		Total
	Primary	Secondary	
England	2,296	38,503	40,799
Scotland	107	3,518	3,625
Wales	301	2,745	3,046
Total	2,704	44,766	47,470
Percentage of total	6%	94%	100%

Further to the number of businesses identified in the primary and secondary categories above, the key issue is the number of workers employed to undertake horticulture, landscape and sports turf-related functions. A very small proportion (6% to 12%) of all workers in horticulture, landscaping and sports turf related occupations were identified as working in a primary business.

Figure 2 shows that the proportions of the workers in primary and secondary businesses remained relatively consistent across England and Scotland, with Wales having nearly double the proportion of primary businesses.

Figure 2 – Proportion of workforce across primary and secondary SIC codes

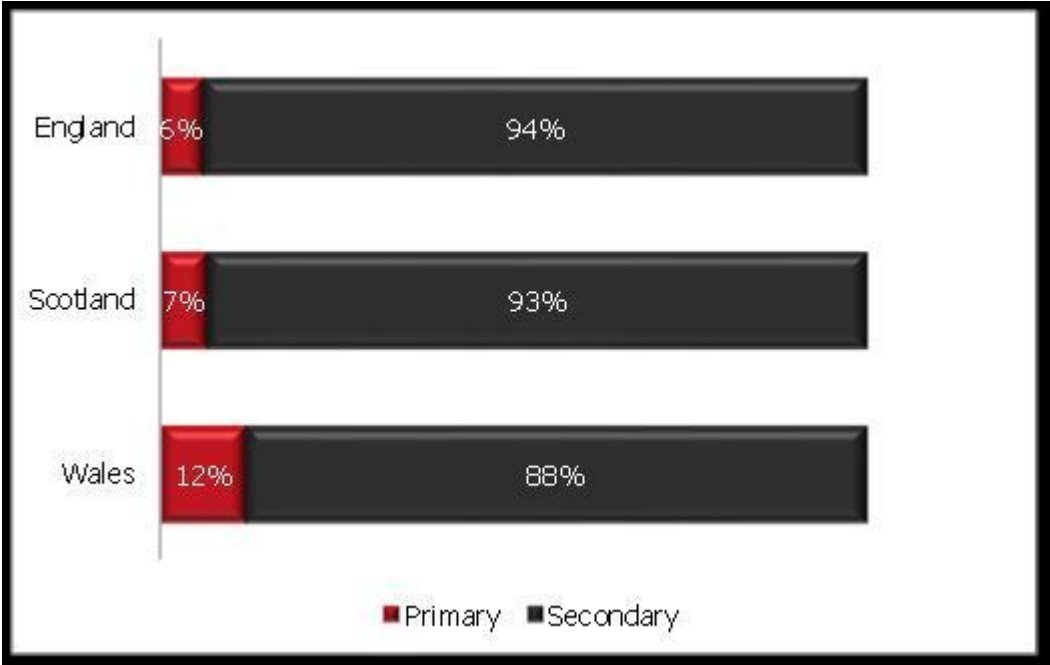


Table 6 sets out the estimated number of workers within each nation operating in primary and secondary businesses. Overall, 12,019 workers are employed by primary businesses, leaving 177,447 workers in horticulture, landscaping and sports turf related occupations working for businesses not previously identified in SIC terms.

Table 6 –Workforce estimates by primary and secondary SIC codes

Country	Workforce		Total
	Primary	Secondary	
England	9,704	151,176	160,880
Scotland	1,372	19,332	20,704
Wales	943	6,939	7,882
Total	12,019	177,447	189,466
Percentage of total	6%	94%	100%

4.3 Workforce characteristics

Businesses employing workers in horticulture, landscape and sports turf related occupations were asked to describe the role the individual was employed to perform. Understanding the job description of every employee was the method used to identify employees in businesses or organisations not primarily involved in horticulture, landscape and sports turf industry. The job titles have been coded against the Standard Occupational Classifications (SOC).

The proportions of workers employed at each occupational level remained relatively constant, with just over a third (34%) employed at managerial, professional or associate levels, slightly less (32%) at the next three occupational levels, and 34% in the three lowest occupational levels. Skilled trades were the most commonly identified occupations, accounting for just over a fifth (22%) of all the positions identified.

Across the four nations, England saw clusters at either end of the occupational spectrum, with a fifth (21%) of people employed as managers and a quarter (26%) employed at the elementary level. In Scotland, most employees were identified within skilled trades (26%) or were machine operatives (22%). Wales had a similar high proportion of employees in skilled trades occupations (29%). A full breakdown, including examples of occupations covered by each level is provided in Table 7.

Table 7 – Workforce occupational classification breakdown

Occupational level	England	Scotland	Wales	Overall
Managers and senior officials (e.g. Parks Director/Manager/Curator)	21%	12%	20%	18%
Professional occupations (e.g. Landscape Architect, Head Green-keeper)	7%	10%	11%	9%
Associate professional and technical occupations (e.g., Agronomist, Plant Pathologist)	5%	11%	10%	8%
Administrative, clerical and secretarial occupations (e.g. Landscape Officer, Sports Ground Co-ordinator)	12%	10%	8%	10%
Skilled trades occupations (e.g. Park Ranger, Gardener)	14%	26%	29%	22%
Personal service occupations (e.g. Human Resources Manager, Sales Manager)	0%	0%	1%	0%
Sales and customer service occupations	2%	6%	3%	4%
Machine operatives (e.g. Ground Care Technician)	12%	22%	14%	16%
Elementary occupations (e.g. Labourer, Assistant/Trainee Gardener)	26%	4%	5%	14%

It is important to remember when reviewing these statistics that they include all workers in the industry, across businesses traditionally associated with horticulture, landscaping and sports turf industry and those not previously within Lantra’s licensed SIC code.

In terms of gender, the workforce in horticulture, landscape and sports turf industry remains dominated by male workers, accounting for 85% of all those employed in the industry. Table 8 below shows that nearly a fifth (19%) of employees in England are female, whilst this figure is lower in Scotland and Wales.

Table 8 – Workforce gender breakdown

Country	Male	Female
England	81%	19%
Scotland	88%	12%
Wales	89%	11%
Overall	85%	15%

The majority of the horticulture, landscaping and sports turf industry workforce (55%) is aged between 25 and 44. The proportion of workers peaks in the 35-44 age category, which covers just under a third of all those employed in this industry. The breakdown shown in Table 9 below sets out the proportions of each age category employed across each nation. This data shows that the proportions differ little across each nation.

Table 9 – Workforce age breakdown

Country	16-24	25-34	35-44	45-54	55-64	65+
England	13%	30%	28%	19%	9%	1%
Scotland	11%	24%	27%	23%	12%	2%
Wales	16%	20%	29%	24%	11%	1%
Overall	13%	27%	28%	21%	10%	1%

In the qualitative research, some leading employers felt there was a wider issue of image associated with horticulture and gardening among young people, schools and careers advisers, and that the association of the sector as being poorly skilled needs to be addressed:

‘...one of the biggest battles we’ve got is a perception in this country, and it’s tied in with the class system, that if you work with your hands you must be thick basically.’

The poor image problem was not seen as equal among all interviewees and sub-industries, however, with the green-keeping sub-industry described as being a very attractive career to many young people, aided by the huge popularity of golf across the UK.

‘You don’t have to be Rory McIllroy or Darren Clarke, but [in the green-keeping sector] you can work on a golf course, with a good salary and a nice career path—from just working outdoors to one day looking after The Belfry or St Andrews.’

Of the workers identified in the quantitative research, 7% were classified as migrant workers, with the vast majority (95%) being EU Nationals²¹. Only 2% of the horticulture, landscape and sports turf industry workers identified were from a non-white ethnic background. A breakdown of this information across the three nations is set out in Table 10 below.

Table 10 - Migration levels and workforce ethnicity breakdown by nation

Country	Migrant workers	Non-migrant workers	White	Non-white
England	12%	88%	98%	2%
Scotland	1%	99%	99%	1%
Wales	1%	99%	99%	0%
Overall	7%	93%	99%	1%

Of the overall horticulture, landscaping and sports turf industry workforce, 90% are employed full-time and 10% employed part-time. Of the workers identified, 15% are classified as freelance or self-employed. Over a fifth (22%) of the workforce is employed on a seasonal basis and 17% of the workforce was identified as working voluntarily. Of the entire workforce across the nations, 2% were identified as apprentices. Table 11 below sets out how these employment types break down between full-time and part-time employment. Table 11 also includes additional data about the different types of worker, estimates that relate to all those employed in a horticulture, landscape and sports turf industry occupation.

In the qualitative research, two Local Authorities interviewed had different experiences in terms of uptake of apprenticeships. One Local Authority described receiving far fewer applications for a number of fully paid apprenticeship positions than expected, which was felt to indicate a lack of demand for entry into the industry, linked with the perceptions of the industry among young people described on the previous page.

Table 10 – Employment status breakdown

Country	Full time	Part time	Freelance	Seasonal	Volunteers	Apprentices
England	89%	12%	24%	13%	27%	2%
Scotland	97%	3%	5%	38%	4%	2%
Wales	87%	13%	5%	25%	5%	2%
Total	90%	10%	15%	22%	17%	2%

²¹ For the purposes of this study, migrant workers includes both EU and non-EU workers.

4.4 Estimates by sub-industry

Further to the breakdown of primary and secondary businesses, Lantra also classifies businesses in the horticulture, landscaping and sports turf industry against seven sub-industry classifications:

- **Parks and green spaces:** the practise of keeping a landscape healthy, clean, safe and attractive, typically in a garden, yard, park, institutional setting or estate
- **Horticulture:** horticulture is the industry and science of plant cultivation including the process of preparing soil for the planting of seeds, tubers, or cuttings
- **Garden design:** garden design is the art and process of designing and creating plans for layout and planting of gardens and landscapes
- **Landscape services:** the term 'hard landscape' describes the construction materials that are used to improve a landscape by design, whilst soft landscaping describes the vegetative materials which are used to improve a landscape by design. These terms are used by practitioners of landscape design, landscape architecture, garden design and gardeners
- **Sports turf and golf green-keeping:** a professional who maintains any sports playing surface (i.e. golf course or country club's grounds)
- **Private, heritage and botanic gardens:** a botanical garden (or botanic garden) is a well tended area displaying a wide range of plants labelled with their botanical names. Heritage covers historic parks and gardens
- **Commercial grounds:** commercial grounds are those surrounding offices or factories.

These classifications reflect the activity within the horticulture, landscaping and sports turf industry in which the business or organisation is engaged. This project considers businesses engaged in horticulture, landscaping and sports turf industry related activities, but for whom these activities are not their primary concern. It is often the case that an organisation may employ workers to deliver activities that cover more than one of the above classifications.

Table 11 below estimates the proportion of businesses operating across the horticulture, landscaping and sports turf industry sector in both primary and secondary functions that relate to each of Lantra's seven sub-industry breakdowns. Full estimates are presented below. We found the greatest numbers of businesses were in the parks and green space sub-industry, followed by sports turf and green-keeping, and then hard, soft and interior landscaping industries.

Table 11 – Number of businesses employing HLST occupations by sub-industry

Sub-industry	Businesses
Parks and green spaces	28,667
Horticulture	1,130
Garden design	616
Hard, soft and interior landscaping	4,829
Sports turf and golf green-keeping	5,240
Private, heritage and botanic gardens	3,596
Commercial grounds	3,391

It was not possible to estimate the number of employees relevant to each sub-industry, as employees identified as working in horticulture, landscaping and sports turf industry roles were identified only by the occupational level in which they worked. Whilst we can estimate which companies are applicable to each sub-industry, it would not be appropriate to classify everyone working in each of the participating businesses as relevant to only one classification.

4.5 Summary of findings

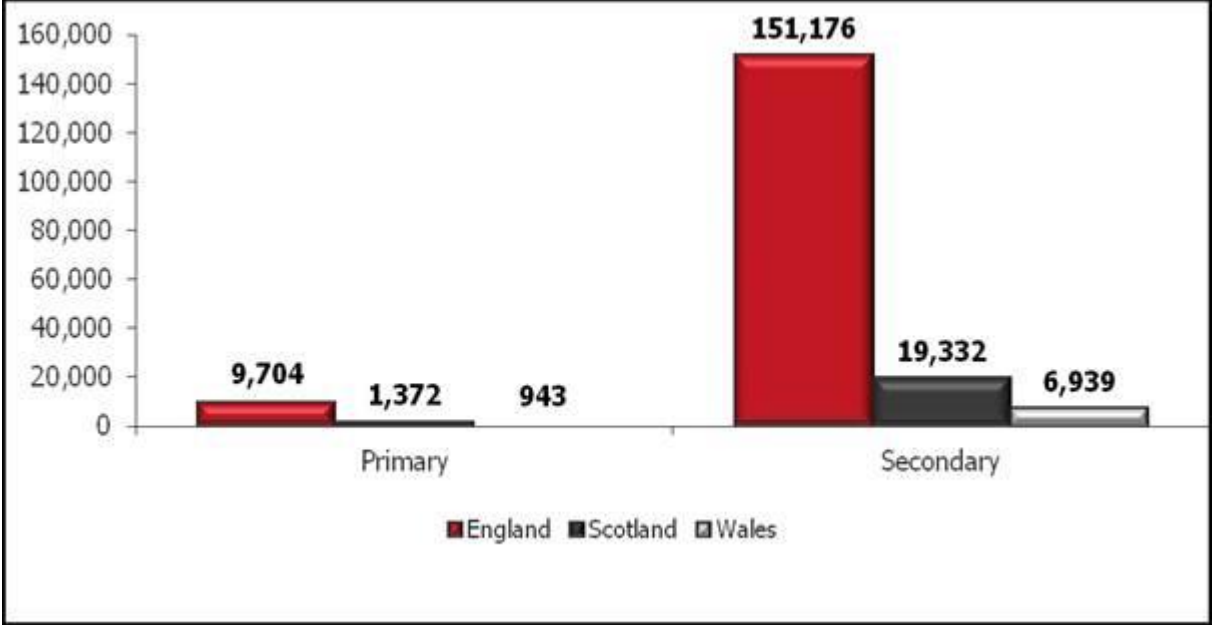
Looking solely at the SIC codes used to define the horticulture, landscaping and sports turf industry we can see that an estimated 2,700 businesses operate in this industry as their primary business function. Earlier research recognised the discrepancy between numbers of businesses in the sector and SIC code estimates, and therefore supplemented SIC-based estimates with additional data from private sector providers²². This estimated the number of businesses operating in the sector at around 18,000. Using the methodology detailed in this report, we estimate the number of businesses who employ occupations related to the horticulture, landscaping and sports turf industry is 47,000. This is a significant increase in the number of businesses employing relevant horticulture, landscaping and sports turf industry occupations.

The estimate in this report of the size of the horticulture, landscaping and sports turf industry workforce is 189,000. This is substantially more than estimates based solely on primary SIC codes (c.12,000). Previous estimates accounting for the measurement difficulties estimate the size of the workforce as 177,000. The methodology therefore indicates that an additional 12,000 workers are employed in the sector.

²² CABE Space Green Space Skills National employer survey findings, 2009.

Figure 3 below sets out the size of the horticulture, landscaping and sports turf industry workforce across each nation, disaggregated by whether individuals are employed by a primary or secondary business.

Figure 3 – Size of workforce across primary and secondary SIC codes by nation

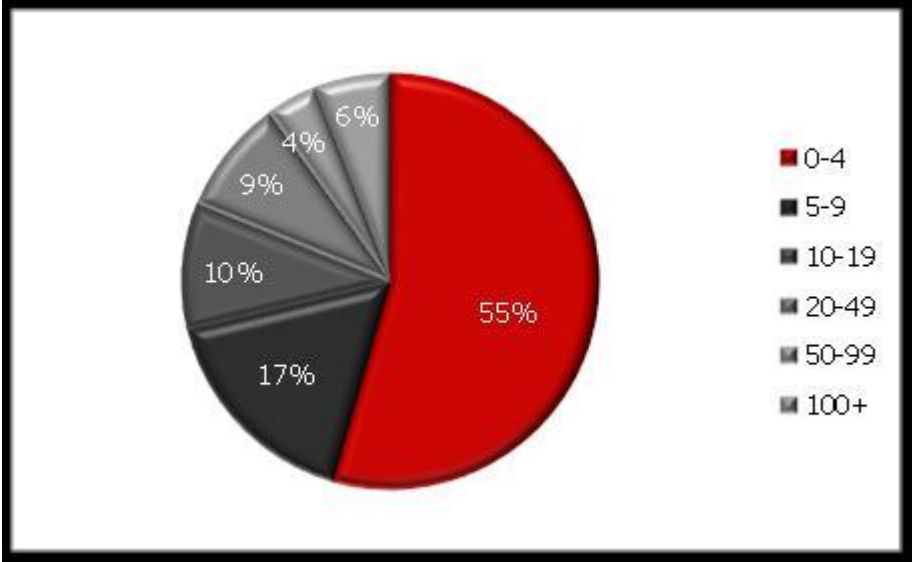


Further to the breakdown of primary and secondary businesses, Lantra also classify businesses in the horticulture, landscaping and sports turf industry against seven sub-industry classifications. These classifications are only relevant to the business or organisation as staff may be employed in roles across a number of sub-industries engaged in horticulture, landscaping and sports turf activities. Of those businesses identified in the horticulture, landscaping and sports turf industry, landscape-service activities accounted for three-fifths (60%).

Including businesses not previously associated with the horticulture, landscaping and sports turf industry impacts upon the size of all businesses operating across the industry. Although the majority of businesses employing horticulture, landscaping and sports turf industry workers are still small (employing 10 or fewer people), this number has fallen from previous industry estimates of 94% to 72% see Figure 4.

The increase in larger businesses is the result of the inclusion of secondary businesses into the estimates. Primary businesses in the land-based and environmental sector tend to be small businesses but the secondary businesses tend to be larger. These secondary industries include Local Authorities and private grounds maintenance companies.

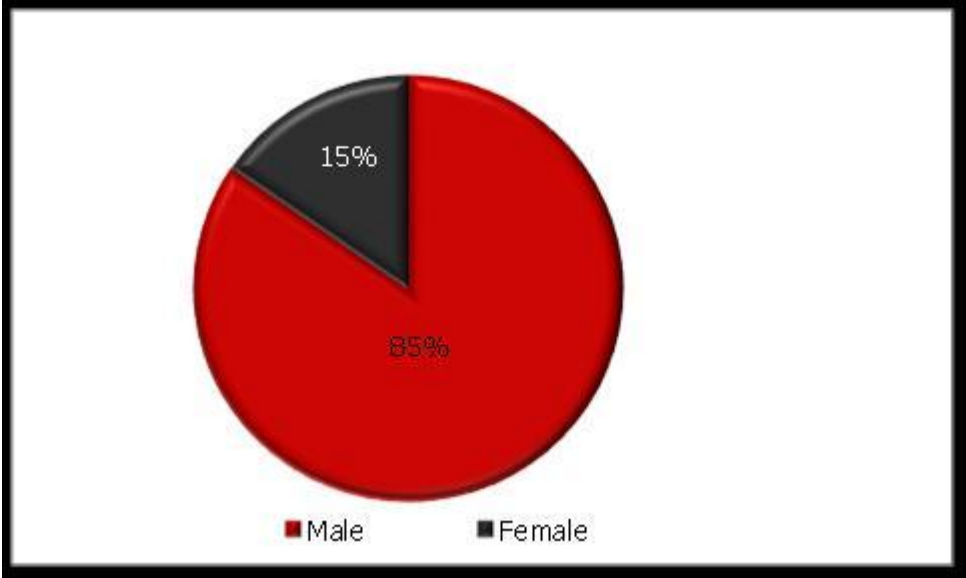
Figure 4 –Businesses by size band



When considering the occupational make-up of the horticulture, landscaping and sports turf industry, we can see that the largest single category remains skilled trades, accounting for over a fifth of all workers (22%). This classification included occupations such as Gardener, Groundsmen and Green-keeper. Previous estimates had put the vast majority of workers (83%) into this category. More workers can now be seen to be working as Managers (18%) and Machine Operatives (16%), for example Gardeners and Groundsmen.

In terms of gender we can see that the workforce remains dominated by men see Figure 5. Including businesses not primarily involved in the horticulture, landscaping and sports turf industry has not changed the proportion significantly, with men still making up around 85% of the workforce.

Figure 5 – Workforce gender breakdown



The age profile of workers has not changed significantly when we include those employed in secondary businesses and organisations. The age profile appears slightly younger than the previous estimate, where 54% of the workforce was aged 35 to 54. This proportion is now 49%, whilst the proportion of workers aged 25-34 has increased from 15% in the previous estimates to over a quarter (27%) in the current study.

The ethnic split between white and non-white workers, even including those employed in secondary businesses and organisations, remains dominated by white workers at 98.5%, up 0.5% points from the previous estimate.

The split between those classified as working full-time and those working part-time has changed significantly, with previous estimates of full-time workers at 78%. This proportion has now increased to 90%. The rise in full-time workers may be due to the inclusion of secondary businesses in this study. A small proportion (2%) of the workforce was identified as apprentices.

The skills implications of those working in horticulture, landscaping and sports turf roles are considered in the next chapter.

5 Skills issues in the horticulture, landscaping and sports turf industry

This chapter of the report considers issues concerning the recruitment, development and retention of staff. The results set out in this chapter consider all businesses employing workers in horticulture, landscaping and sports turf industry roles, not just those for which horticulture, landscaping and sports turf industry is the primary function of the business. As before, comparison with previous studies should take into account the fact that this study includes data from businesses not previously considered part of the horticulture, landscaping and sports turf industry, but employing workers in horticulture, landscaping and sports turf industry roles. Please note these estimates are based on information about characteristics of the workforce provided by Human Resources departments, or business leaders with a responsibility for recruitment and training, and so again are not directly comparable with figures elsewhere.

The data relates to all organisations employing workers in the horticulture, landscaping and sports turf industry, of which 241 were interviewed (see Table 2). Based on an estimated population of 47,470 organisations, this provides a confidence width for data of $\pm 6.3\%$ at the 95% confidence interval.

5.1 Recruitment and retention

Over the last 12 months, businesses relevant to the horticulture, landscaping and sports turf industry recruited on average two new employees per business. During the same period, an average of 1.2 workers left businesses. At the top level, this suggests a net gain in the number of people working in the horticulture, landscaping and sports turf industry over the past 12 months.

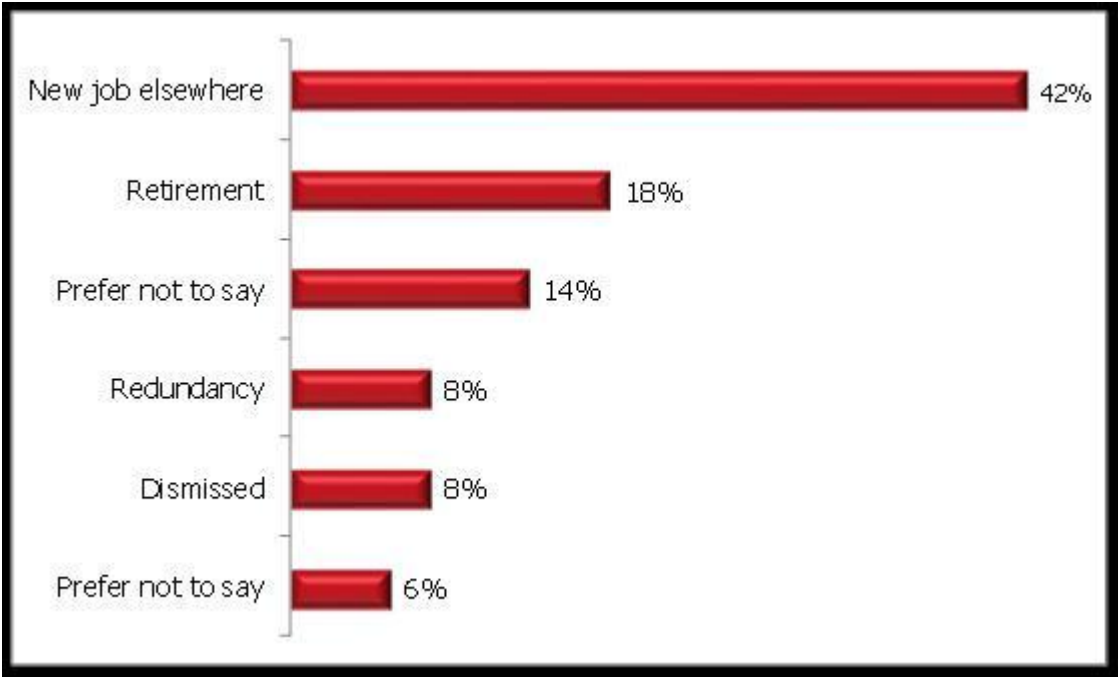
Table 12 sets out a breakdown of the overall numbers joining and leaving horticulture, landscaping and sports turf businesses across each nation. This table shows that the net gain described above was reflected across all nations, although far more marginal in Scotland and Wales.

Table 12 – Staff movement

Country	Recruited	Left	Net
England	2.59	1.2	1.39
Scotland	2.12	1.83	0.29
Wales	0.99	0.56	0.43
Overall	2.04	1.21	0.83

Where a business indicated that staff had left over the last 12 months, they were asked the reason for this. Nearly half (42%) of those businesses indicating that a staff member had left stated that they were leaving to go to a new job elsewhere and this is likely to be within the industry. Of the businesses, 18% indicated that staff had left due to retirement, whilst 8% indicated that staff had been made redundant see Figure 6 below.

Figure 6 – Reasons for leaving employment



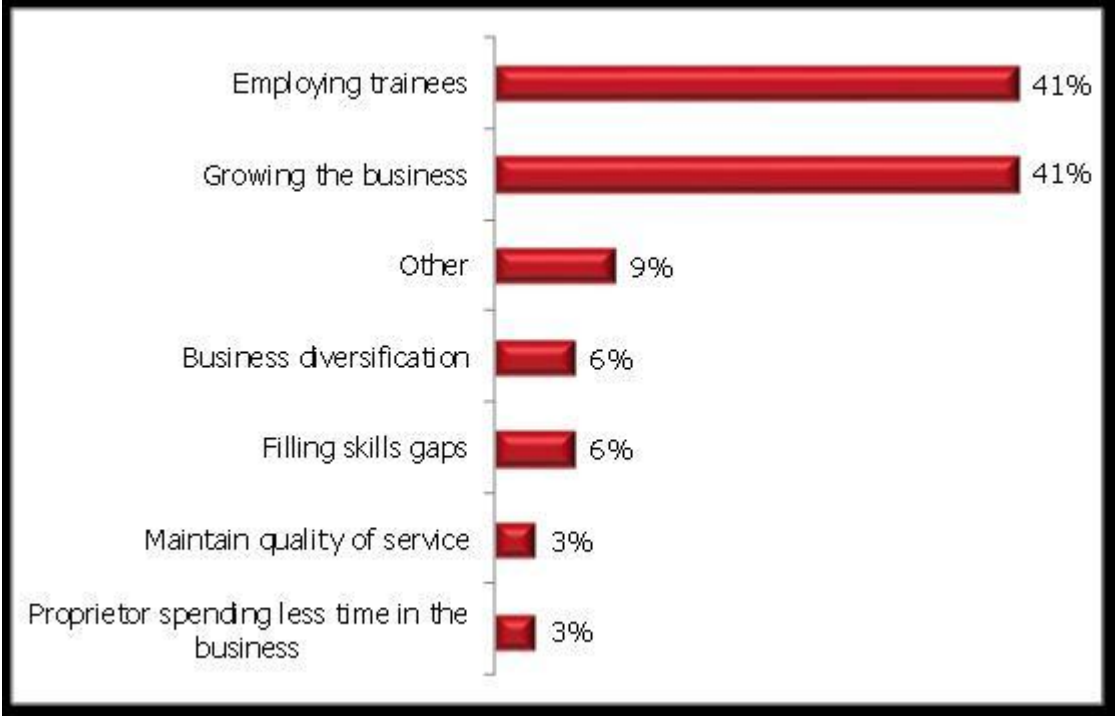
Of all the horticulture, landscaping and sports turf industry businesses interviewed, 10% expected to replace staff over the coming 12 months. Overall, 11% of those interviewed indicated that they thought staff numbers would increase over the next 12 months, whilst over half (60%) indicated that they were most likely to remain the same. The breakdown in Table 13 below shows that this trend remains consistent across each of the nations.

Table 13 – Anticipated staff changes

Country	Increase	Remained the same	Decrease	Don't know
England	11%	56%	6%	27%
Scotland	12%	62%	4%	22%
Wales	9%	65%	7%	20%
Overall	11%	60%	5%	24%

Of those businesses indicating they were anticipating to increase the number of staff employed, the average number of employees looking to be taken on in the next 12 months was three. The reasons given for staff joining the businesses were predominantly identified as recruiting trainees (41%) and growing the business to increase capacity (41%) see Figure 7.

Figure 7 – Reasons for staff joining the business



Note: percentages sum does not equal 100% due to multiple responses.

Of businesses indicating that they were anticipating losing staff from the business in the next 12 months, the average number of individuals was 1.67. The reasons given for staff leaving were that the business was cutting back, largely due to the political/economic climate.

In the qualitative research, there was some evidence of skills in amenity horticulture being affected by the Government’s austerity programme, which is creating skills gaps. The reduction in headcount means that very often the volume of staff with specialist skills and knowledge is being reduced and therefore creating skills shortages. This leads to a situation of ‘fire fighting’, which doesn’t necessarily fit with the strategic needs of the service.

5.2 Job vacancies

Overall, the average number of job vacancies identified in the horticulture, landscape and sports turf businesses interviewed was 0.26. The vacancies identified are set out in Table 15 below. Of the vacancies identified, nearly two-thirds (60%) were in elementary occupations. This does not represent a balanced occupational breakdown of employment opportunities, and is therefore reflective of the sector. Where vacancies were present, a quarter (25%) was not being advertised.

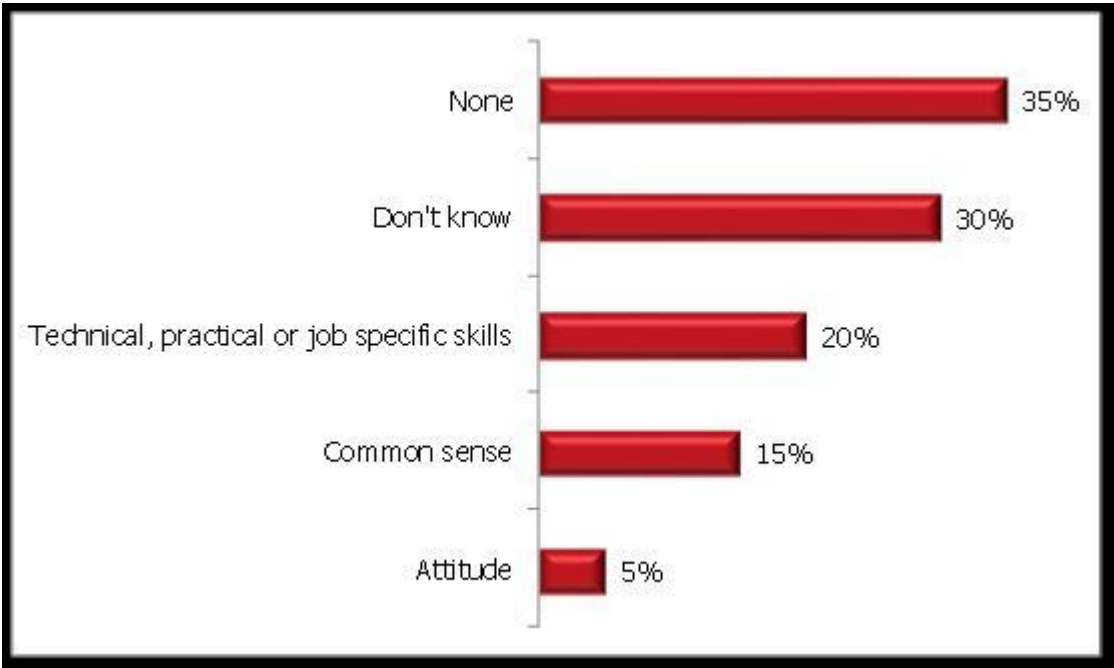
Table 14 – Total job vacancies across workforce occupational classifications

Occupational level	Percentage of vacancies identified
Managers and senior officials (e.g. Parks Director/Manager/Curator)	6%
Professional occupations (e.g. Landscape Architect, Head Green-keeper)	8%
Associate professional and technical occupations (e.g., Agronomist, Plant Pathologist)	5%
Administrative, clerical and secretarial occupations (e.g. Landscape Officer, Sports Ground Co-ordinator)	6%
Skilled Trades occupations (e.g. Park Ranger, Gardener)	5%
Personal service occupations (e.g. Human Resource Manager)	5%
Sales and customer service occupations (e.g. Sales Manager)	3%
Machine operatives (e.g. Ground Care Technician)	1%
Elementary occupations (e.g. Labourer, Assistant/Trainee Gardener)	60%

5.3 Hard-to-fill vacancies (HtFVs)

Of the job vacancies identified by horticulture, landscaping and sports turf businesses, 25% were considered 'hard-to-fill'²³. Of those businesses who had HtFVs, nearly two-thirds (60%) suggested this was due to a lack of interest in the types of job they were advertising. Two-fifths (40%) of businesses with HtFVs suggested that they suffered from a low number of applications, the terms and conditions weren't suitable, or there was too much competition from other employers. Figure 8 below sets out the main reasons identified by employers advertising hard-to-fill vacancies.

Figure 8 – Skills lacking in applicants



In the qualitative research, respondents described various difficulties with recruiting for hard-to-fill vacancies. One Local Authority stated issues with recruiting for specific technical roles including Landscape Designer, Arborist, and Propagator) which, after costly national recruitment exercises, often only receive a handful of applications. This clearly affects the efficiency of the service and as a result there is a need to outline the technical aspects of each job specification in order to attract and recruit a suitable person. To counter this, more succession planning and internal training is required, which is also costly as well as a complex managerial task.

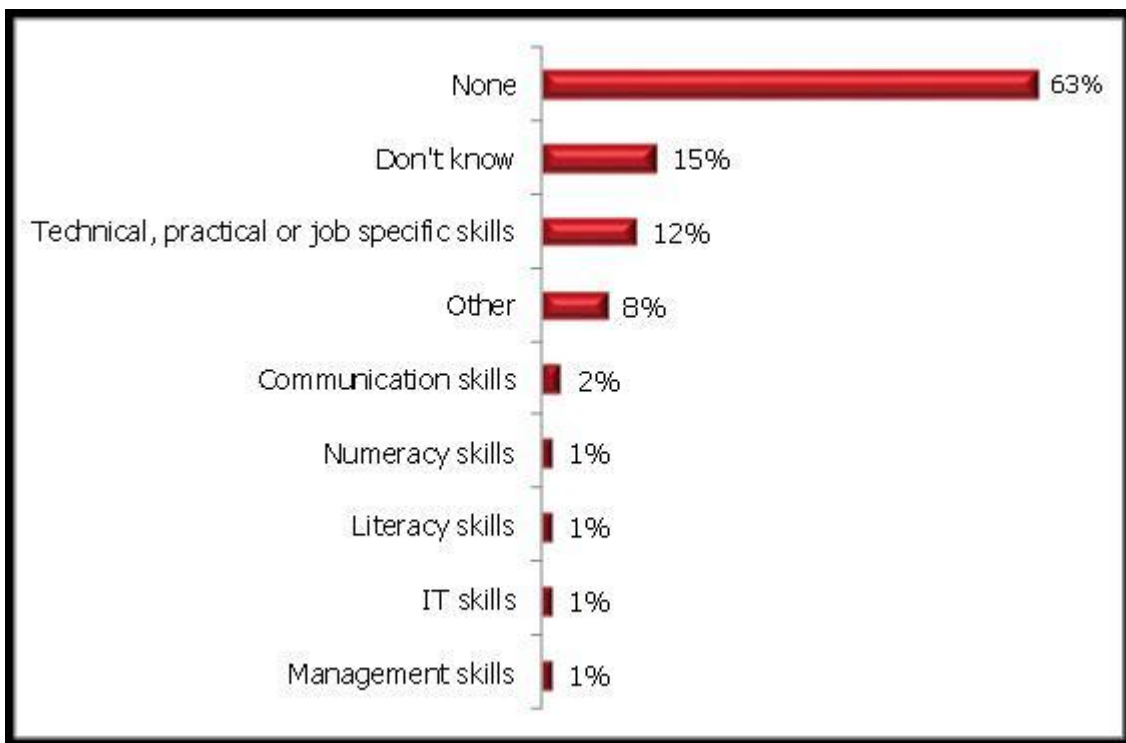
The effect is that we are unable to fill key frontline posts across quite a few disciplines and that affects services delivered to the public, as well as services delivered internally.

²³ HtFVs are those vacancies described by employers as being hard-to-fill. Reasons often include skills-related issues, but can simply involve such aspects as poor pay or conditions of employment, or the employer being based in a remote location.

5.4 Training gaps

When asked what skills horticulture, landscaping and sports turf employers felt their current staff could improve, nearly two-thirds (63%) of respondents indicated that they did not believe any skills needed improving. Technical, practical and job specific skills were identified by 12% of respondents. There are two plausible reasons for this. Firstly, employers may well have workforces who are sufficiently skilled in their work and are therefore considered not to require training, (see Figure 9 below, or, there is the possibility that employers feel less confident to talk to a telephone interviewer when there are employee skills gaps. This may be a methodological issue in terms of a limited time to build rapport in short telephone interviews and/or employers may feel reluctant to discuss skills gaps affecting their workforce more generally.

Figure 9 – Workforce skills to improve



Note: percentages sum does not equal 100% due to multiple responses.

In the qualitative research, respondents described the following skills gaps:

Technology developments were felt to dominate much of the sector, both in machinery and IT/communication systems. The skill to use this technology to its optimum, from technician to management, is a challenge across the sector. Information technology skills are seen as a key skills gap as processes become increasingly aided by technology (e.g. use of handheld devices). More generally, the increasingly professionalised working practices in the sector mean that higher-level skills will need to be developed.

Academic skills are steadily becoming more relevant to the industry with changes in working practices and technology. Traditionally, the industry required little or few formal qualifications or higher-level skills, so many existing staff struggle to cope with change and the more scientific approach being advocated across the industry.

Protection of the environment in all respects is producing a number of challenges in the horticulture, landscape and sports turf industry, not only in the recognition of species (protected, invasive, non-native animal and plant), but also the management, regulations and implication of effects (e.g. the use of pesticides), while managing increased biodiversity. These challenges go across all levels of the sector. Within these demands are the sustainable management requirements, including carbon footprinting, fuel efficiencies, waste recycling etc.

Environment and conservation issues are increasingly important to the work in the industry. Changes in pesticide legislation will have an effect on skills required in the industry alongside drives to reduce water consumption and other inputs.

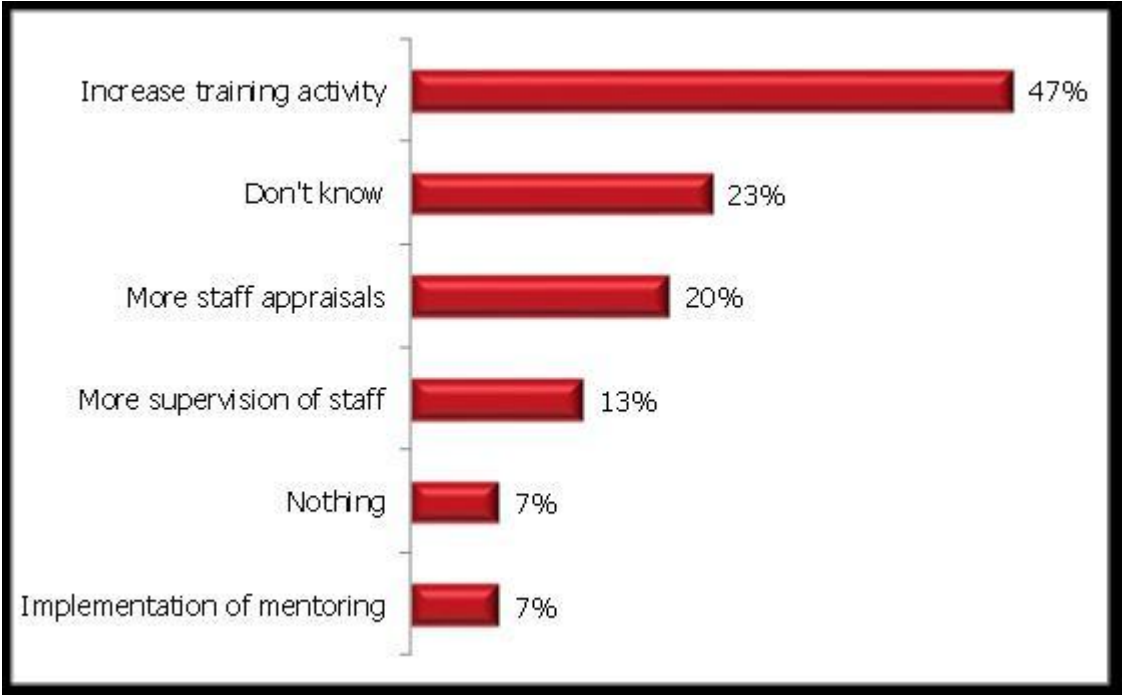
Leadership, management and supervisory skills among the more experienced staff have been identified as the major area for concern in previous surveys including the last Sector Skills Assessment (Lantra, 2010). In particular, the biggest difficulty is the transition from craft/technician level to management level. This is a result of the inherent mismatch between the type of practical skills and disposition individuals need earlier on in their careers, against an increasingly professional, scientific and business-orientated approach to the management of parks, green space and gardens.

Among Local Authorities in particular, changes in the funding environment and the promotion of greater civic participation through the 'Big Society' agenda, means that Local Authority managers will increasingly need the skills to engage with their local communities, recruit and manage volunteers and encourage greater teaching and advocacy skills among members of staff.

Particular demands are: customer communication, working with/managing volunteers (both across varying cultural and language barriers) and the increased diversity of skills required in the workforce, especially the public sector (e.g. Street Scene). In addition, income generation and marketing skills for parks and gardens, especially with the emphasis on community involvement ('Localism', Big Society agenda from the Government), in a period of severe austerity, is proving a challenge.

When asked what actions businesses had taken to improve staff skills, where required, increased training activity was most commonly identified at 47%. A fifth (20%) (see Figure 10) of businesses indicated that they undertook more staff appraisals, whilst 13% increased supervision.

Figure 10 – Actions to improve workforce skills

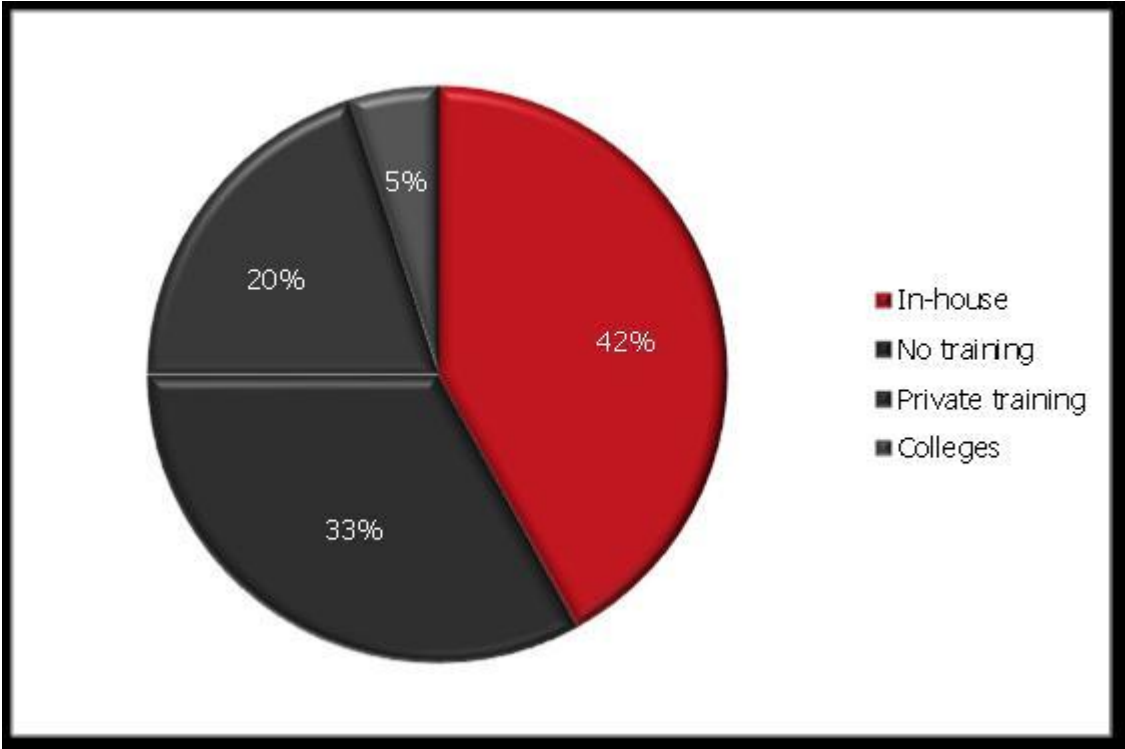


Note: percentages sum does not equal 100% due to multiple responses.

When asked how their training is organised, as shown in Figure 11, 42% of businesses indicated that they delivered training in-house. A fifth (20%) of businesses used private training providers, whilst 5% used colleges. A third (34%) of the businesses spoken to indicated that they undertook no training at all. This indicates the size of the barrier in attempting to upskill the horticulture, landscaping and sports turf industry.

Just under half (44%) of the horticulture, landscaping and sports turf businesses interviewed delivered training over and above that required by law. In terms of whether horticulture, landscape and sports turf employers train staff to formal qualification standard, or choose just the relevant skills, 57% of employers choose to train just to the relevant skills.

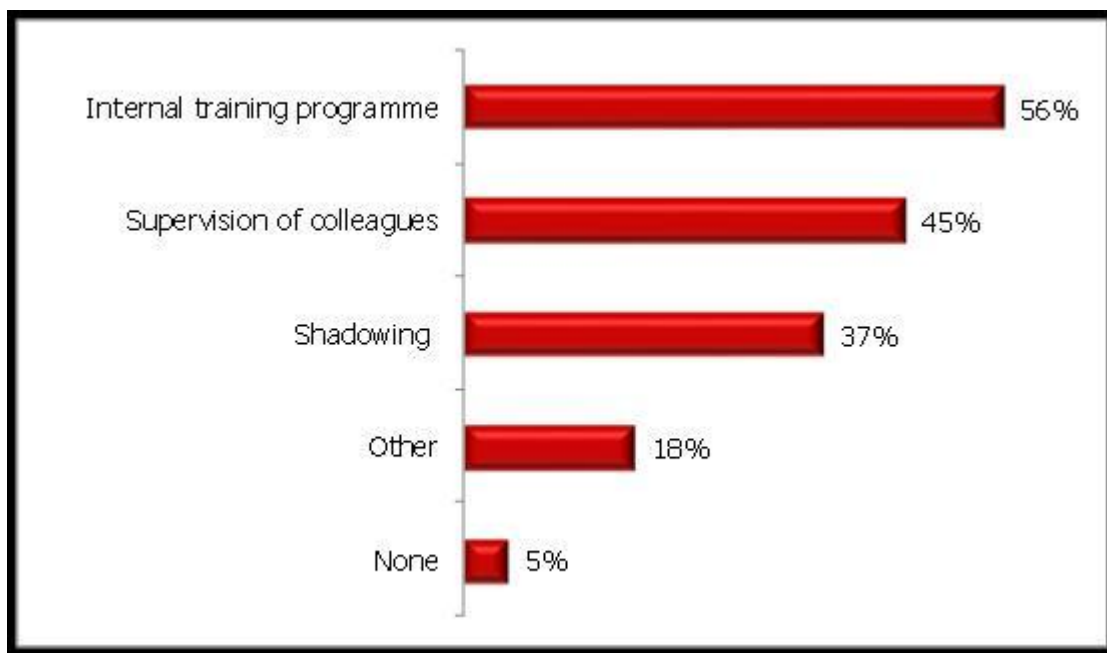
Figure 11 – Training provider



In-house training

Of the horticulture, landscaping and sports turf employers indicating that they organised training in-house, (see Figure 12) just over half (56%) used internal training programmes, while 45% made use of supervision by colleagues. Just over a third (37%) used work shadowing. Shadowing differed from supervision in that employees are expected to observe another worker. When an employee is supervised by a colleague they are performing, not observing, the tasks required.

Figure 12 – Types of in-house training



Note: percentages sum does not equal 100% due to multiple responses.

Across all methods of in-house training, 71% of the businesses employing this method made use of some form of assessment.

External training

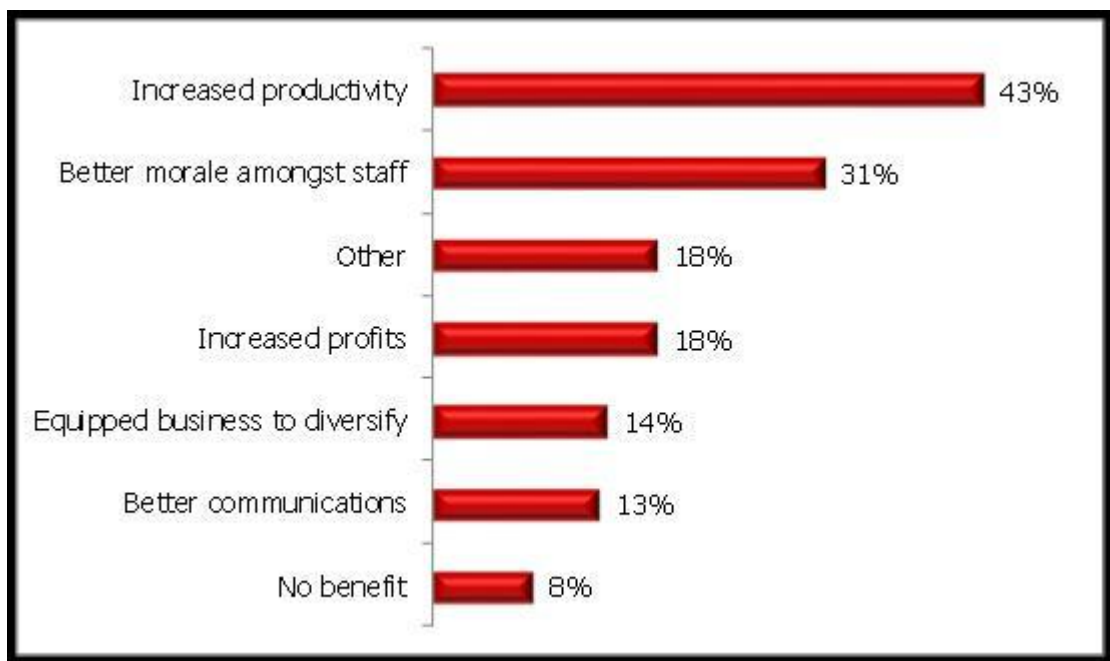
Of those horticulture, landscaping and sports turf industry employers accessing external training, over three-quarters (82%) had used training courses, whilst just over a quarter (28%) had made use of a conference or seminar.

When asked whether businesses employing horticulture, landscape and sports turf workers would support an industry-run CPD scheme²⁴, over half (55%) indicated that they would. Over a third (34%) indicated that they didn't know, suggesting that more information/publicity is required to inform the industry about what such a scheme would entail.

Training benefits

Horticulture, landscaping and sports turf employers utilising training, either internally or externally, were asked what they perceived the benefits of training to be. Nearly half (43%) indicated that training increased the productivity of their workforce. Nearly a third (31%) believed that training improved morale amongst their staff, whilst nearly a fifth (18%) believed that training helped increase the profitability of their business see Figure 13.

Figure 13 – Training benefits



Note: percentages sum does not equal 100% due to multiple responses.

²⁴ CPD is defined as 'any process or activity that provides added value to the capability of the professional through the increase in knowledge, skills and personal qualities necessary for the appropriate execution of professional and technical duties, often termed competence.' (Professional Associations Research Network.)

Nearly a third (29%) of horticulture, landscape and sports turf employers indicated that if they could have done, they would have liked to do more training. Nearly the same amount again (28%) indicated that they did not know whether they would have liked to have done more training and this tallies well with the qualitative material where the need for CPD was being voiced.

Training barriers

Of those horticulture, landscape and sports turf industry employers indicating that they would have liked to undertake more training, over half (58%) indicated that they lacked the funds required, whilst just over a third (36%) indicated they couldn't spare the staff time. A summary of the key barriers to training is set out below in Figure 14.

Figure 14 – Barriers to training



Note: percentages sum does not equal 100% due to multiple responses.

In the qualitative research, respondents mentioned that delivery of training did not aid the problems in skills that are basic to the industry among the workforce. This is due to the fact that these types of basic, industry specific skills are not taught in relation to the industry within which the entrant will be working where there is a requirement for more bite-size specialist courses that enable people to learn industry related basic skills. Again the CPD aspect of such courses was emphasised by the qualitative research.

Practical skills were considered to be a principal skills gap within amenity horticulture, green-keeping and botanic gardening. New entrants were widely quoted as lacking basic day-to-day practical skills for landscaping, and in many instances basic numeracy and literacy skills.

One council typically takes entrants from deprived backgrounds and through schemes such as the 'future jobs fund' and 'welfare to work'. This often means the authority needs to address basic literacy and numeracy before they can address the fundamental lack of practical skills.

'Half of them don't know what a garden is for, apart from maybe kicking a football.'

In terms of training, one respondent particularly welcomed the arrival of the Qualifications and Credit Framework (QCF) as a development many employers were supportive of. However, because of the fiscal environment, there is still a lack of bite-sized unit-based training with funding bodies providing money for full qualifications and full awards.

'When is the bite-sized QCF going to bounce into life? Only when funding is available.'

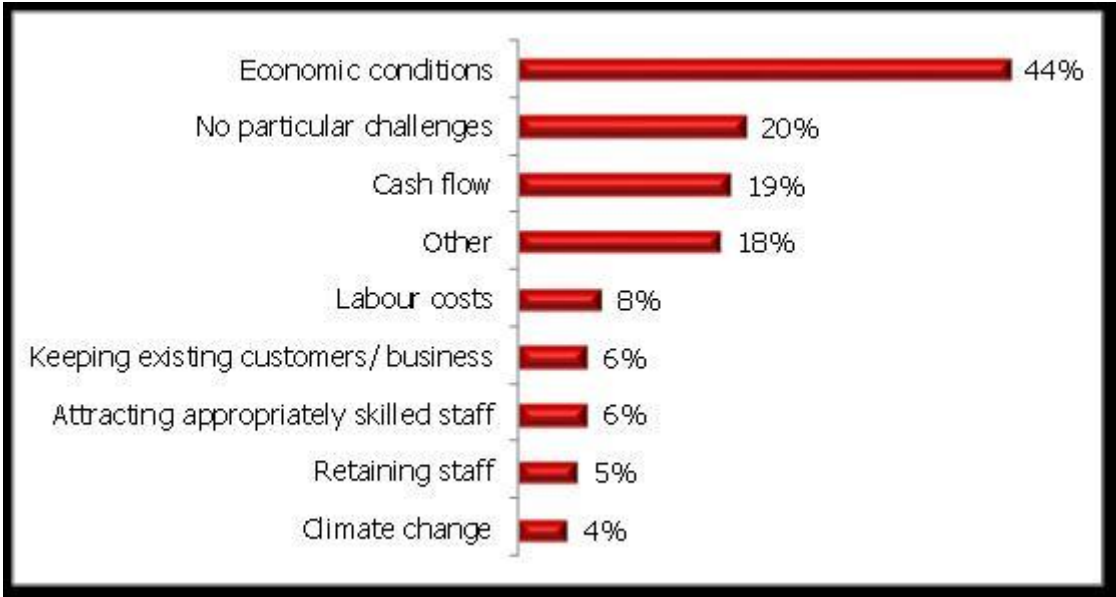
There is a trend for people from other sectors and occupations to enter horticulture, landscaping and sports turf in later life, but often such individuals lack practical skills. These career changers need the training and support to gain the basic skills needed to work in the industry and this is an area of development suggested via the qualitative research.

One respondent stated a significant lack of support within the horticulture, landscaping and sports turf industry, as well as more generally, for career changers. Many of the skills gaps in the industry are being filled by career changers who are generally self-funded. Career changers bring many additional transferrable and managerial skills along with them that alleviate many of the problems in the industry, and more support/flexibility in funding would be welcome to encourage such career changes.

5.5 Future challenges in horticulture, landscaping and sports turf industry

Economic conditions, for example the effect of the recession, were the most commonly identified challenge that businesses were concerned about over the next 12 months see Figure 15. This category was identified by 44% of respondents providing an answer to this question. Cash flow was also identified as an area of concern over the coming year, with just under a fifth (19%) of respondents indicating that money was going to be tight. Nearly a fifth (18%) of respondents provided a mixture of replies, and this was grouped as 'Other' during the data analysis stage.

Figure 15 – Challenges over the next 12 months



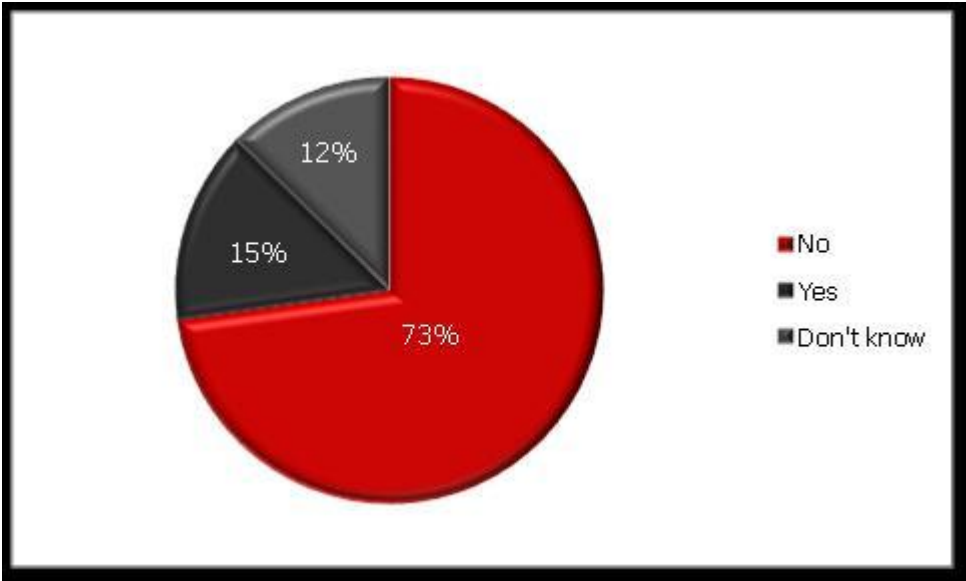
Note: percentages sum does not equal 100% due to multiple responses.

As described in Section 5.1 and 5.4 above, in the qualitative research interviewees from Local Authorities felt that responding to the Government’s austerity programme is proving a particular challenge for the industry.

5.6 Diversification

Whilst the vast majority of businesses interviewed indicated that they did not anticipate diversifying into another area of business over the next 12 months, 15% of those interviewed indicated that they were considering such a move see Figure 16. Renewable energy, pest control and retail were areas most commonly identified for potential diversification.

Figure 16 – Considering new business areas



In the qualitative research, respondents said there are key emerging skills requirements among Local Authorities within businesses that are diversifying. Parks services are increasingly being asked to generate revenue streams through sponsorship, with the park manager post now increasingly required to have the skills to help make deals. These include skills in sales, marketing, and negotiating, as well as some skills in contracting/financing. Future training for managers potentially needs to include elements of these types of skills in order to meet objectives of increasingly unorthodox funding streams.

If we don't help people to learn the skills such as negotiation, project management and other management practices, the quality of green spaces will be further reduced.

5.7 Horticulture, landscaping and sports turf skills and business needs

The open-ended responses from the telephone survey, together with information collected during the focus groups and discussion with the industry partnership manager and Lantra industry group were collated to produce the horticulture, landscape and sports turf skills and business needs summarised in Table 16.

Table 15 – Horticulture, landscaping and sports turf skills issues, business needs and training solutions

Key issues	Skills needs and training solutions
<ul style="list-style-type: none"> • Public sector: financial cuts on top of already tight budgets, resulting in staff reductions with potential knock on effects for service provision • Parks are not a mandatory service and therefore do not have protected budgets 	<ul style="list-style-type: none"> • Managers will need to market the importance and relevance of their services • Skills to meet the objects of different funding streams
<ul style="list-style-type: none"> • Many areas that depend on paying visitors for income are seeing a reduction in visitors, which will undoubtedly lead to a reduction of staff or more becoming part-time • This is also true for some sports facilities that depend on paying members to keep the club financially sound • Loss of membership now means that these clubs have to look at other means to bringing in the required finance or face closure 	<ul style="list-style-type: none"> • The innovative marketing of these facilities is essential
<ul style="list-style-type: none"> • Research has indicated that the sector has an ageing workforce, with the average at 50+ years • This is producing a blockage in the system for promotion resulting in a lack of young managers coming through the system and gaining the skills for sustainable management 	<ul style="list-style-type: none"> • This is beginning to show with the loss of skills when the older employees retire • The introduction of technical NOS at Levels 4 and 5 are essential
<ul style="list-style-type: none"> • The traditional inability to measure the contribution of the 'green infrastructure' (parks, gardens, sport facilities etc.) to the public health, environmental conservation, climate mitigation, community inclusion etc. has resulted in the lack of priority for the sector. This in turn has generally resulted in a poor perception of the sector, which has been transferred to the low take up in formal education and skills • This low take up of training has further transferred itself to the gradual reduction in training provision or access, especially that linked to public funding 	<p>In the 'Grow Strategy' the main skills gaps for managers were:</p> <ul style="list-style-type: none"> • Marketing and promoting sites • Fundraising • Planning for sustainability and climate change • IT professional skills • Working with community, volunteers and communicating green space matters • Change management

Key issues	Skills needs and training solutions
<ul style="list-style-type: none"> • This sector is traditionally renowned for its Apprenticeship schemes. After a period of real lack in training take up, the process started to change, resulting in a number of organisations, especially public park departments, initiating Apprenticeship schemes • This has also been encouraged by some financial assistance from various organisations (e.g. CABE Space for parks departments) • However, linked with Point 4, some optimism has been lost due to the lack of training providers to meet the training and assessment requirements 	<ul style="list-style-type: none"> • There is a need for a co-ordinated approach across each region to meet the needs of horticulture training

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6 Conclusions and recommendations

6.1 The 'hidden' workforce

This research revises upward the number of primary businesses operating within the sector from 2,700 to 18,000, a sevenfold increase. This was a welcome finding to focus group participants as those who work in the industry have noted anecdotally that there are more people in the sector than official statistics estimate. The scope of the sector increases again when looking at horticulture, landscaping and Sports turf occupations employed within wider SIC sectors. Estimates of the number of businesses that contain horticulture, landscaping and sports turf occupations is 47,000, increasing estimates by some 29,000. It is important to note that this estimate is subject to statistical variation, which is above industry average. Our estimates of employment in the horticulture, landscaping and sports turf industry are more robust than business estimates with a confidence interval of 15%. These estimates show there are some 189,000 individuals working in the industry across various SIC sectors. At a 15% level of confidence, this figure relates to between 161,000 and 217,000 workers, which represents a similar picture of the size of the workforce compared with previous estimates. Together, our estimates of the size of the industry represent the most robust attempt at measuring the scope of the sector compared to previous LMI presented as part of Lantra's research work.

We also estimate the number of businesses/organisations in the various sub-industries making up horticulture, landscaping and sports turf. Horticulture, landscaping and sports turf workers and professionals are employed across a diverse range of organisations including Local Authorities, secondary and higher education institutions, hospitals, housing associations, utility sites and many others. Appendix 4 highlights the many different SIC codes where horticulture, landscaping and sports turf occupations are employed. We found the greatest number in parks and green spaces followed by sports turf and green-keeping and landscape services. While we are not claiming a definitive figure for the environmental conservation workforce, this research highlights that official statistics systematically underestimate the scale of the horticulture, landscaping and sports turf industry. It should be noted that these estimates are sourced using a different methodology, but most importantly, the identification of a large workforce in trees and timber roles has a clear skills implication, and we therefore recommend the following:

Recommendations:

1. Disseminate clear, up-to-date information about career entry, progression and professional development opportunities for potential and recent entrants into the sector.
2. Promote training and development in public engagement by, for example, sharing best practice among and between large employers such as Local Authorities and museums.
3. Further promote skills, training and CPD for horticulture, landscaping and sports turf job roles identified within other sectors, particularly among large employers.

6.2 Skills and recruitment implications

Our research has uncovered encouraging signs for recruitment opportunities in the industry with a net gain of the number of people working in the industry over the past 12 months. Furthermore, the majority thought that staff numbers were likely to stay the same in the next 12 months with approximately 11% expecting an increase in recruitment, indicating some confidence in business prospects. There was not a broad range of vacancies offered at different occupational levels.

Hard-to-fill vacancies are particularly prevalent in the sector, some 25% of all vacancies identified as being hard-to-fill. This brings the level of hard-to-fill vacancies higher than the broader land-based sector, indicating that there is a significant skills shortage in the industry. The qualitative research showed HtFVs in terms of key technical roles, particularly within amenity horticulture. Hard-to-fill vacancies were less apparent in green-keeping. It was thought these issues could be addressed through more succession planning by managers and internal training.

Nearly two-thirds of respondents thought they did not need to improve the skills of their business, with management skills not seen by many to need improvement. A third of respondents also stated that they do not train their workforce. However, many businesses did recognise the benefits of training to be increased productivity and morale with only 8% believing that there was no benefit. There is also support for continuous professional development with over half of respondents stating they would support a cross-sector co-ordinated scheme. The most commonly mentioned barriers to training were lack of funds and costliness (58%) and not being able to spare staff time (36%). This shows that businesses would like to train their staff, but there are significant barriers in doing so.

Qualitative research identified skills gaps in the workforce as being practical skills, literacy and numeracy and higher-level academic skills as the profession becomes more and more scientific. In particular, skills gaps in new entrants included basic literacy and numeracy and lack of practical skills. This was considered to be mainly a function of poor image problems, with the exception of Golf Green-keeping. Another common skills gap in the workforce was leadership, management and supervisory skills among more experienced staff, despite low mentions of management skills as being in need of improvement within the quantitative research.

Specific technical skills gaps identified within amenity horticulture included plant identification, professional gardening skills; e.g. pruning, propagation and plant, pest and disease identification etc. In botanic gardening, a particular skills gap among 'legacy gardeners' is that of public interaction, with many lacking the presentation and other soft skills to interact with the public.

Information technology was seen to be a key driver of the industry alongside greater public engagement, crop protection changes, and the need for greater business and commercial acumen because of generating new income streams with amenity horticulture. More by way of help for career changers was generally welcome, as they are key to increasing higher-level management skills in the industry.

Recommendations:

4. Address the principal barriers to training and upskilling of expense and time, by introducing more flexible courses that can be accessed at affordable prices.
5. Alternative routes to higher-level qualifications (e.g. higher apprenticeships) should be explored, to encourage more entrants with higher levels of literacy and numeracy skills.
6. Implement a CPD framework where more flexible provision can contribute to while creating better opportunities for progression. This may also lead to an increase in availability of job-specific technical training as more training is recorded.
7. Promote training and development in new areas in terms of generating alternative income streams for parks services, including negotiation and communication skills.
8. There is a need to develop career progression pathways within the sector, in particular highlighting areas of overlap and transferrable skills across land-based and environmental sectors to encourage career changers. More funding should also be made available for training older entrants.

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Appendix 1 – Telephone Survey Script

Good morning/afternoon, is that <INSERT NAME OF EMPLOYER>?

My name is <INSERT NAME> and I am calling on behalf of Lantra. We are conducting a survey into the training and skills requirements of businesses operating in the <INSERT INDUSTRY NAME> industry. The interview will take on average 10 to 15 minutes. Would it be convenient to conduct the interview now?

Would you like contact details now or at the end of the survey?

Contact at Lantra is Ruchira Pounds if they would like to find out more about the survey (02476 696996).

Would you like me to provide you with a freephone number for the Market Research Society? You can use this to check the validity of this research project?

If yes: 0500 39 69 99

Q0a Account ID; to be taken from salesforce on agreement to interview

	Primary industry (licensed)	Secondary industry (hidden)
Q0b1 Trees and timber	▪	▪
Horticulture, landscaping and sports turf	▪	▪
Environmental conservation	▪	▪

Your business

Q1 How would you classify this business?

- Private sector business
- Voluntary or charity organisation
- Public sector organisation

Q1a If it is a private business, are you self-employed? (Only asked if Q1 = Private Sector Business)

- Yes
- No

Q2 In terms of your entire workforce, how many people are involved with your business?

Including freelance and voluntary staff, particularly in environmental conservation.

Q3 In terms of your workforce, how many staff are paid? (i.e. on the payroll)

Q4 Of the paid staff, how many staff are male?

Q4a How many male staff work full-time?

Q5 Of the paid staff, how many staff are female?

Q5a How many female staff work full-time?

Q6 Of the total staff, how many staff are freelance or self-employed?

Q7 How many migrant workers has your business employed in the last 12 months?

A non-UK national that has come to the UK at some point during the last 3 years and is working on a permanent, fixed-term, seasonal or casual basis

Q7a How many are EU Nationals? (only asked if the answer to Q7 = 1 or more)

Q8 How many seasonal workers has your business employed over the last 12 months?

Work that is only carried out during certain seasons of the year or a worker who finds employment only in certain seasons.

Q9 How many current staff are volunteers?

'Volunteer': any activity which involves spending time, unpaid, doing something that aims to benefit someone (individuals or groups other than, or in addition to, close relatives) or to benefit the environment.

Q10 How many trainee/apprentices have been employed in the last 12 months:

'Apprentices': those on funded (internally or externally) schemes.

Q10a How many are training as part of a national apprenticeship program:

Q10b How many are training as part of an in-house bespoke project-based training program:

Q10c Who funds your own in-house bespoke training program:

- A one-off external training project grant
- In-house funding
- Other

If Other, please specify:

Q10e Why have you chosen to run your own bespoke training program and not participate in Government funded apprenticeship initiatives?

Q10f If none, why?

- Don't have the time/resource to invest in getting them skilled up at the start to begin being effective in their role
- Lack of flexible/realistic funding to help us invest in their development from the start
- Lack of knowledge, understanding, skills or experience to introduce and manage the learning process/mentoring
- No requirement

Q11a Of the {Q3} staff you employ, how many are aged 16-24:

Q11b Of the {Q3} staff you employ, how many are aged 25-34:

Q11c Of the {Q3} staff you employ, how many are aged 35-44:

Q11d Of the {Q3} staff you employ, how many are aged 45-54:

Q11e Of the {Q3} staff you employ, how many are aged 55-64:

Q11f Of the {Q3} staff you employ, how many are aged 65+:

Q12 Of the {Q3} staff you employ, how many are from a non-white ethnic background:

Q13 Of the {Q3} staff you employ, how many are disabled:

The Equality Act 2010 defines disability as 'a physical or mental impairment, which has a substantial and long-term adverse effect on your ability to carry out normal day-to-day activities'.

I'd like to breakdown your entire workforce onto nine categories. Can you indicate how many of many staff your organisation employs, if any, in each category:

For small businesses, ask for the job roles of those employed within the business and code accordingly.

Q14c For EC

Amongst your entire workforce, how many staff fall within the MANAGERS, DIRECTORS AND SENIOR OFFICIALS category (e.g. Estate Manager, National Park Officer) category?

Q14d If the number isn't available, what percentage falls within the MANAGERS, DIRECTORS AND SENIOR OFFICIALS category?

Q14g For EC

Amongst your entire workforce, how many staff fall within the PROFESSIONAL OCCUPATIONS (e.g. Senior Ranger, Senior Ecologist) category?

Q14h If the number isn't available, what percentage falls within the **PROFESSIONAL OCCUPATIONS** category?

Q14k **For EC**

Amongst your entire workforce, how many staff fall within the **ASSOCIATE PROFESSIONAL AND TECHNICAL OCCUPATIONS** category?

Q14l If the number isn't available, what percentage falls within the **ASSOCIATE PROFESSIONAL AND TECHNICAL OCCUPATIONS** category?

Q14o **For EC**

Amongst your entire workforce, how many staff fall within the **ADMINISTRATIVE AND SECRETARIAL OCCUPATIONS** (e.g. Events Organiser, Volunteer Co-ordinator) category?

Q14p If the number isn't available, what percentage falls within the **ADMINISTRATIVE AND SECRETARIAL OCCUPATIONS** category?

Q14s **For EC**

Amongst your entire workforce, how many staff fall within the **SKILLED TRADES OCCUPATIONS** (e.g. Dry Stone Walling Contractor) category?

Q14t If the number isn't available, what percentage falls within the **SKILLED TRADES OCCUPATIONS** category?

Q14w **For EC**

Amongst your entire workforce, how many staff fall within the **CARING, LEISURE AND OTHER SERVICE OCCUPATIONS** (e.g. Community Recycling Officer) category?

Q14x If the number isn't available, what percentage falls within the **CARING, LEISURE AND OTHER SERVICE OCCUPATIONS** category?

Q14a For EC

a Amongst your entire workforce, how many staff fall within the SALES AND CUSTOMER SERVICE OCCUPATIONS (e.g. Visitor Centre Assistant) category?

Q14a If the number isn't available, percentage falls within the SALES AND CUSTOMER SERVICE OCCUPATIONS category?

Q14a For EC

e Amongst your entire workforce, how many staff fall within the PROCESS, PLANT AND MACHINE OPERATIVES category?

Q14af If the number isn't available, what percentage falls within the PROCESS, PLANT AND MACHINE OPERATIVES category?

Q14ai For EC

Amongst your entire workforce, how many staff fall within the ELEMENTARY OCCUPATIONS (e.g. Estate Worker, Volunteers) category?

Q14aj If the number isn't available, what percentage falls within the ELEMENTARY OCCUPATIONS category?

Recruitment

Q15 In general, over the past 12 months, how many staff have you taken on:

Q16 How many people have left your employment in the last 12 months?

Q16a Did these staff leave for any of the following reasons (Only ask if Q16 = 1 or more)?

- | | |
|---------------------|---------------------|
| ▪ New job elsewhere | ▪ Prefer not to say |
| ▪ Retirement | ▪ Dismissed |
| ▪ Redundancy | ▪ Other |

If Other, please specify:

Q17 Over the next 12 months, do you expect to replace any existing staff (e.g. replacement of staff that have retired or moved to another business)?

- Yes
- No

Q18 Over the next 12 months do you expect the number of people employed at this establishment to:

- Increase
- Decrease
- Remain the same
- Don't know

Q18b How many additional staff do you expect to employ over the next 12 months (only asked if Q18 = Increase)?

Q18c What is the reason for this (only asked if Q18 = Increase)?

Code, do not ask.

- Growing the business/increasing the workload
- Impact of increased business administration
- Filling skills gaps (Skills gaps exist where employees are not fully proficient at their job.)
- Business diversification
- Proprietor spending less time in the business
- Maintain quality of service
- Employing trainees
- Other

If Other, please specify:

Q19 How many staff do you expect to leave the business in the next 12 months?

Q19a What is the reason for this (only asked if Q19 = 1 or more)?

Code, do not ask.

- Staff leave due to retirement
- New technology
- Business closing
- Staff leave for other reasons
- Business cutting back/downsizing
- Political/economic climate
- Staff leave to go to another job
- Training programme completed
- Not enough people interested in doing this type of work
- Other
- Use seasonal labour

If Other, please specify:

Q20 How many job vacancies do you currently have within this business?

Q20a Have you advertised any of these vacancies (only asked if Q20 = 1 or more)?

- Yes
- No

Q20b For which occupations do you have vacancies (only asked if Q20 = 1 or more)?

SPECIFY THE NUMBER OF VACANCIES IN EACH OCCUPATION

Managers and senior officials _____

Professional occupations _____

Associate professional and technical occupations _____

Administrative and secretarial occupations _____

Skilled trades occupations _____

Personal service occupations _____

Sales and customer service occupations _____

Process, plant and machine operatives _____

Elementary occupations _____

Q20c Are any of these vacancies proving hard-to-fill (only asked if Q20 = 1 or more)?

HtFVs are those vacancies described by employers as being hard-to-fill. Reasons often include skills-related issues, but can simply involve such aspects as poor pay or conditions of employment, or the employer being based in a remote location.

- Yes
- Don't know
- No

Q20c Which vacancies are proving hard-to-fill (only asked if Q20c = Yes)?

1

Q20d If you have a hard-to-fill vacancy, what do you feel are the main causes (only asked if Q20c = Yes)?

Code, do not ask.

- Too much competition from other employers
- Lack of interest in this type of job
- Terms and conditions for the post are considered unsuitable
- Applicants lack the required skills/experience
- Applicants lack relevant qualifications
- Applicants lack the required attitude and motivation
- Low pay and benefits compared to other types of work
- Limited career progression/prospects
- Low number of applicants generally
- Job entails unsociable hours
- Remote location/poor transport
- Lack of work experience the company demands
- Seasonal
- Don't Know /No particular reason
- Other

If 'Other' please specify:

Q20e What skills, if any, have you found lacking from applicants (only asked if Q20c = Yes)?

Code, do not ask.

- None
- Management skills
- Technical, practical or job specific skills
- Communication skills
- Customer handling skills
- Team working skills
- Problem solving skills
- IT skills
- Office administration skills
- Literacy skills
- Numeracy skills
- Foreign language skills
- Common sense
- Attitude
- Other
- Don't know

If 'Technical, practical or job specific skills' please specify:

If 'Management skills' please specify:

If 'Other' please specify:

Training

Q21 What skills, if any, do you feel your current staff could improve?

Code, do not ask.

- Management skills
- Technical, practical or job specific skills
- Communication skills
- Customer handling skills
- Team working skills
- Problem solving skills
- IT skills
- Office administration skills
- Literacy skills
- Numeracy skills
- Foreign language skills
- Common sense
- Other
- Don't know
- None

If 'Technical, practical or job specific skills' please state

If Management skills' please state

If 'Other' please specify:

Q21a What action, if any, is the business taking to help staff improve the skills identified above (Question not asked if the answer to Q21 = None)?

Code, do not ask.

- Increase training activity/spend or increase/expand trainee programmes
- Increase recruitment activity/spend
- More staff appraisals/performance reviews
- Implementation of mentoring/buddying scheme
- More supervision of staff
- Nothing
- Other
- Don't know

If 'Other' please specify:

Q22 Is your training mostly delivered by colleges, in-house training or private providers?

- Colleges
- In-house (on-the-job)
- Private training providers
- No training

If no training, why not?

Q23 Do you do training over and above what is required by law?

- Yes
- No
- Don't know

Q23b What type of in-house was arranged for staff (Only asked if Q22 = In-house)?

- Supervision of colleagues
- Shadowing
- Internal training programme
- None
- Other

If Other, please specify:

Q23b Is the training assessed (Only asked if Q22 = In-house)?

2

- Yes
- No

Q23c What type of 'off-the-job training' was arranged for staff (Only asked if Q22 = colleges or private)?

- Conference or seminar
- Training course
- Other

If Other, please specify:

Q24 Would you be supportive of an industry run CPD (continuous professional development) system?

CPD is defined as 'any process or activity that provides added value to the capability of the professional through the increase in knowledge, skills and personal qualities necessary for the appropriate execution of professional and technical duties, often termed competence.' (Professional Associations Research Network.)

- Yes
- No
- Don't know

Q25 How has your business benefited from the training undertaken (Only asked if Q22 = In-house, colleges or private)?

- Better morale amongst staff
- Better communications
- Increased productivity
- Increased profits
- Equipped business to diversify
- No benefit
- Other

If 'Other' please specify

Q26 If you could have done, would you have provided MORE training for your staff than you were able to over the last 12 months?

- Yes
- No
- Don't know

Q26a What has prevented you from accessing more training for you or your staff in the last 12 months (If q26 = Yes)?

- Nothing
- No requirement
- All staff are fully proficient
- The courses we're interested in are not available locally
- Difficulty getting information about courses available locally
- The quality of the course or course providers is not satisfactory
- The start dates or times of the courses are inconvenient
- External courses are too expensive
- Employers can't afford to release staff for training?
- Managers/employers are too busy to organise or provide training
- Employees are too busy to attend training
- Lack of funds/training is expensive
- Cant spare more staff time
- Staff not keen
- Lack of provision (geographical issue)
- A lack of appropriate training/qualifications in the area we need
- Hard to find the time to organise training
- Lack of knowledge about training opportunities and suitable courses
- None
- Other (please state)
- Don't know

If 'Other' please specify:

Future challenges

Q27 What challenges do you anticipate your business will face over the next 12 months?

Code, do not ask.

- Economic conditions (e.g. effects of recession)
- Increasing business competition
- Attracting appropriately skilled staff
- Labour costs
- Geographic location
- Cash flow
- Seasonality of business
- Insurance premiums
- Business rates
- Keeping existing customers/business
- Legislation changes
- No particular challenges
- Disease /pests
- Retaining Staff
- Climate change
- Other (please state)

If 'Other' please specify?

Q28 Does your company plan to move into any new areas of business activity in the next 12 months?

- Yes, please specify
- No
- Don't know

If yes, please specify

Q29 Would you be willing to take part in a focus group as part of this research?

- Yes
- No

Q29a If willing to take part, take a contact name and telephone number:

Q30 Any further comments?

Thank you for your assistance.

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Appendix 2 – Job titles

Table A – Top 10 by volume

Gardener
Groundworker
Horticultural Manager
Groundsman
Seasonal Gardener
Ground Worker
Gardener Handyman
Ground Maintenance Operative
Head Gardener
Green-keeper

Table B – Master list of job titles

Agronomist	Allotment and Green Space Officer
Allotment Officer	Agronomist
Amenity Gardener	Allotment volunteer
Apprentice Green-keeper	Apprentice Gardener
Arboretum Park Manager	Apprentice Groundsman
Area Park Officer	Area Operation Manager Ground Maintenance
Assistant Crematorium and Cemetery Officer	Area Supervisor Park and Ground Maintenance Organisation
Assistant Gardener	Assistant Curator Botanic Garden and Glasshouse Facility
Assistant Green-keeper	Assistant Grave Digger
Assistant Head Gardener	Assistant Ground Manager
Botanist	Assistant Head Groundsman
Casual Cemetery Ground Staff	Assistant landscape gardener
Cemetery and Crematorium Manager	Casual Cemetery Operative
Cemetery Assistant	Cemetery and Crematorium Technician
Cemetery Crematorium Manager	Cemetery Crematorium Assistant
Cemetery Gardener	Cemetery Foreman
Cemetery Officer	Cemetery Manager
Cemetery Supervisor	Cemetery Operative
Charge hand Gardener	Cemetery Technician
Commercial Manager Ground Maintenance	Chief Horticultural Scientist
Community Park Ranger	Community Garden Officer
Community Ranger Gardener	Community Park Warden

Contract Manager and Operation Manager Ground Maintenance Landscape Construction	Conservation and Landscape Officer
Contract Manager Ground Maintenance	Contract Manager Horticultural
Contract Manager Landscape and Ground Maintenance	Cremator Technician Gardener
Deputy Ground Manager	Deputy Head Gardener
Deputy Head Green-keeper	Deputy Head Groundsman
Foreman Gardener	Foreman Ground Maintenance
Garden and Park Manager	Garden Landscape Operative
Garden Maintenance Operative	Garden Maintenance Supervisor
Garden Maintenance Team Leader	Garden Manager
Garden Nursery Assistant	Garden Nursery Operative
Garden Supervisor	Gardener
Gardener Cremator Technician	Gardener Crematorium Assistant
Gardener Estate Worker	Gardener Grave Digger
Gardener Ground Manager	Gardener Landscape
Gardener Landscape Supervisor Foreman	Gardener Maintenance Supervisor
Gardening Apprentice	Gardening Volunteer
Golf Course Manager Head Green-keeper	Grave Digger
Green-keeper	Grave Digger Gardener
Ground Maintenance Chargehand	Green-keeper Apprentice
Ground Maintenance Contract Manager	Ground Maintenance Client Officer
Ground Maintenance Development Officer	Ground Maintenance Contract Supervisor
Ground Maintenance Driver	Ground Maintenance Division Manager
Ground Maintenance Landscape Operative	Ground Maintenance Foreman
Ground Maintenance Machinery Manager	Ground Maintenance Landscaper
Ground Maintenance Mobile Team Leader	Ground Maintenance Manager
Ground Maintenance Regional Director	Ground Maintenance Officer
Ground Maintenance Supervisor	Ground Maintenance Regional Manager
Grower Horticulturalist	Groundsman
Head Gardener	Growing Manager Agronomist
Head Ground Person	Head Green-keeper
Head Horticulturalist	Head Groundsman
Head of Horticultural	Head of Landscape and Ecology
Head of Park Management	Horticultural Adviser
Horticultural and Landscape Officer	Horticultural Apprentice
Horticultural Assistant	Horticultural Assistant Supervisor
Horticultural Contract Manager	Horticultural Expert
Horticultural Exterior Plant Technician	Horticultural Gardener
Horticultural General Manager	Horticultural Ground Manager

Horticultural Landscape Officer	Horticultural Manager
Horticultural Nursery Operative	Horticultural Nursery Production Manager
Horticultural Nursery Staff	Horticultural Nursery Worker and Packer
Horticultural Officer	Horticultural Plant Centre Manager
Horticultural Scientist	Horticultural Specialist
Horticultural Sprayer	Horticultural Supervisor
Horticultural Team Leader	Horticultural Technician
Horticultural Therapist	Horticultural Trainee
Horticultural Worker	Horticulturalist
Interior Ground Maintenance Operative	Landscape and Ground Maintenance Officer
Landscape Gardening Team Leader	Landscape Ground Maintenance Operative
Landscaper Gardener	Landscaping Garden Maintenance Assistant
Maintenance and Garden Operative	Maintenance and Ground Manager
Maintenance Team Leader Horticultural	Operative Ground Maintenance
Organic Vegetable Gardener	Outdoor Park Attendant
Outer Estate Horticulturalist	Part-time Gardener
Part-time Gardener and Maintenance	Part-time Horticultural Rehabilitation Work Supervisor
PA for Horticultural Director	PA Housekeeper Gardener Couple
Painter and Gardener Available	Park Administration Officer
Park Admission Assistant	Park and Garden
Park and Grass Assistant	Park and Landscape Officer
Park Assistant	Park Attendant
Park Attendant Casual	Park Attendant Part-time
Park Cemetery Manager Contract	Park Cleaner
Park Community Outreach Officer	Park Consultation Officer
Park Facility Manager	Park Garden Ground Person
Park Garden Manager	Park Garden Operative
Park Gardener	Park ground project manager
Park Green River	Park keeper
Park Inspector	Park maintenance officer
Park Keeper Ground Person Green Fingers	Park Management Assistant
Park Maintenance	Park Manager
Park Maintenance Operative	Park Manager Warden
Park Management Couple	Park Officer
Park Mobile Patrol	Park Open Space Manager Local Government London
Park Officer Offender Supervision	Park Operation Manager
Park Open Space Section Head	Park Operational Supervisor

Park Operative	Park Outreach Officer
Park Project Manager	Park Outreach Worker
Park Ranger	Park Project Officer
Park ranger team manager	Park Ranger Green Space
Park Service Manager	Park Seasonal Operative Temporary Month Posts
Park Standard Officer	Park Service Manager
Park Strategy Officer	Park Strategy Co-ordinator
Park Superintendent	Park Sub-contract Manager Ground Maintenance
Park Warden	Park Team Leader
Park Warden Ride Assistant	Parkland Officer
Park Warden Cleaning Assistant	Part-time Casual Garden Work
Part Manager Horticultural Machinery	Part-time Estate Handyman Gardener
Part-time Driver Cleaner Garden Maintenance	Part-time Gardener
Part-time Garden Maintenance	Part-time Gardener Ground Maintenance Person
Part-time Gardener Handyman	Part-time Gardener Maintenance Assistant
Part-time Groundsman	Part-time Gardener
Part-time Horticultural Project Manager	Part-time Ground Maintenance Operative
Part-time Lecturer Entry Level Horticultural	Part-time Housekeeper Attendant Groundsman
Part-time Park Officer	Part-time Maintenance Gardener
Part-time Property Ground Assistant	Part-time Property Caretaker Groundsman
Part-time Supervisor	Part-time Seasonal Ground Person
Pat Tester Gardener Urgent	Part-time Winter Garden Assistant
Permanent Part-time Gardener	Permanent Ground Maintenance Supervisor
Plant Pathologist	Play Park Attendant
Play Park Co-ordinator	Play Park Ranger
Policy Adviser Groundwater	Pocket Park Officer
Polo Ground Maintenance Worker	Policy Research Waste Management Park Keeper
Porter Gardener Handyman	Portable Appliance Tester Landscape Gardener
Practical Instructor Horticultural Gardening	Practical Instructor Resource Technician Horticultural
Premises and Ground Support Person	Principal Park Officer
Principal Potato Specialist and Head of Agronomy	Professional Gardener

Professional Gardener Handyman	Professional Groundscare Service Engineer
Project and Park Officer	Project Co-ordinator Garden Need
Project Manager Horticultural or Similar Degree Required	Project Officer Park Countryside
Project Manager Sport Industry Background	Qualified Gardener
Provision of Ground Maintenance	Qualified Green-keeper
Qualified Experience Housekeeper Cook and Gardener Handyman	Rainforest Biome Graduate Horticulturalist
Qualified Groundsman	Rainforest Biome Horticulturalist
Rainforest Biome Horticultural Supervisor	Recreation Attendant
Ranger Park	Refuse Collector Garden Waste
Recruit Garden Maintenance Franchisee	Refuse Park Worker
Refuse Collector Garden Waste Seasonal	Regional Agronomist
Regional Agronomics Manager	Regional Ground Maintenance Contract Supervisor
Regional Facility Manager Hard Service Background	Regional Manager Horticultural Service
Regional Ground Maintenance Manager	Reliable Gardener Labourer
Regulatory Affairs Agronomist	Relief Caretaker Cleaner Groundsman
Reliable Retired Gardener	Relief Gardener Handyman Driver
Relief Caretaker Gardener	Research Agronomist
Relief Janitor External Ground Keeper	Research Assistant Agronomy
Research Agronomist	Research Director Agronomics Trait
Research Assistant Garden	Resident Landscape Gardener
Resident Caretaker Ground Person	Resource Technician Practical Instructor Horticultural
Resident Landscape Gardener Commercial Landscape Gardener	Riding Instructor Groom
RHS Garden Manager	Road and Ground Supervisor
Road and Ground Branch Chief	Roof Garden Project Manager
Roof Garden Division Manager	Russian-speaking Daily Gardener
Room Leader Covent Garden	School Gardening Co-ordinator
School Gardener	Scrum Master Ground Breaking Project
Seasonal Beach Park Litter Picker	Seasonal Amusement Park Ride Operator
Seasonal Caravan Park General Worker	Seasonal Beach Park Litter Picker
Seasonal Fee Collector Gardener	Seasonal Caravan Park Warden
Seasonal Gardener Cemetery Temporary	Seasonal Gardener
Seasonal Gardener Driver	Seasonal Gardener Ground Staff Driver
Seasonal Gardener Ground Maintenance	Seasonal Gardener Tractor Driver

	Labourer
Seasonal Gardener Labourer	Seasonal Golf Bowling Green-keeper
Seasonal Gardener Non-driver	Seasonal Green-keeper
Seasonal Gardener Temporary	Seasonal Green-keeper Resort
Seasonal Gardening Ground Staff Driver	Seasonal Ground Maintenance Operative
Seasonal Green-keeper	Seasonal Ground Maintenance Operative Gardener
Seasonal Ground Cleansing	Seasonal Ground Person Posts
Seasonal Ground Maintenance Operative	Seasonal Groundsman
Seasonal Ground Warden	Seasonal Horticultural Staff
Seasonal Groundsman	Seasonal Kitchen Gardener
Seasonal Horticultural Worker	Seasonal Live-in Gardener Handyman
Seasonal Landscape Gardener	Seasonal Park Ground Operative
Seasonal Park Assistant	Seasonal Street and Ground Staff
Seasonal Park Staff	Seasonal Wild Mountain Gardener
Seasonal Urban Park Ranger	Seasonal Gardening Assistant
Seasonal Worker Game In-park Attendant	Semi-skilled Groundsman
Self-employed Gardener	Senior Botanist
Senior Agronomist	Senior Community Park Ranger
Senior Cemetery Officer	Senior Ecologist Botanist
Senior Contract Manager Landscape and Ground Maintenance	Senior Entomologist Horticultural Research
Senior Ecologist Botanical	Senior Ground Person
Senior Gardener	Senior Groundsman
Senior Horticulturalist Arboriculture	Senior Horticultural Manager Kenya
Senior Park Officer	Senior Merchandiser Garden Maintenance
Senior Park Steward	Senior Park Ranger
Senior Principal Botanist	Senior Park Warden
Senior Tender Manager Landscape Construction Ground Maintenance	Senior Sales Agronomy Service Agricultural
Service Engineer Ground Source Heat Pump	Senior Sport Groundsman
Shiftleader Assistant Manager	Senior Gardener
Site Horticulturalist Groundsman	Session community gardener
Skill Labourer With CSCS Card and PTS Overground Card	Session Lecturer Horticultural
Soft Landscaper Maintenance Gardener	Stadium Groundsman
Spanish-speaking Agronomist	Site Groundsman
Specialist Gardener Horticulturalist	Skill Gardener
Sport Ground Assistant	Soft Landscape Specialist Horticulturalist
Sport Groundsman	Soybean Agronomics Trait Intern Waterman
Steward Co-ordinator Lords Cricket Ground	Specialist Gardener

Stonefruit Agronomist	Sport Attendant Hood Park Leisure Centre
Strimmer Ground Maintenance Operative	Sport Ground Co-ordinator
Summer Seasonal Warden Lydiard Park Ref.	Sport Park Manager
Supervisor Ground Maintenance	Steward for Sport Ground and Festival
Supervisor Landscape Gardening	Street Cleaner Park Ranger
Support Worker Horticultural	Student Gardener Luxury Acre Estate Gardener
Swimming and Gardening LSA	Supervisor Ground Maintenance
Team Leader Ground Maintenance	Supervisor Landscape Gardener
Team Leader Landscape Gardener	Supervisor Sport Ground Maintenance
Team Manager Ground Maintenance	Support Worker Horticulturalist
Temporary Labourer Ground Maintenance	Team Leader Gardening
Temporary to Permanent Groundsman	Team Leader Horticultural
Tender Manager Ground Maintenance	Team Leader Park and Ground Maintenance Organisation
Theme Park First Aider	Technician in Horticultural
Tractor Driver Ground Maintenance Operative	Temporary Park Project Officer
Trainee Agronomist	Theme Park Assistant
Trainee Gardener	Theme Park Operator
Trainee Green-keeper Council	Trainee Gardener
Trainee Groundsman	Trainee Horticultural Support Volunteer
Trainee Horticulturalist	Trainee Kitchen Gardener
Trainee Skill Gardener	Trainee Support Person IT or Engineering Background
Trainee Technical Graduate Food Science Agriculture Background	Trainee Vegetable Agronomist
Tree Climber and Groundsman	Tree Climber Ground Maintenance Operative
Tree Landscape Planner	Tree Surgeon and Ground Staff
Tree Surgeon Ground Labourer	Tree Surgeon Mate Landscape Operative
Tree Surgery Ground Maintenance	Under Gardener
Upland Botanist	Urban Park Ranger
Vegetable Agronomist	
Volunteer Garden Assistant	Vegetable Gardener
Volunteer Gardener Handyman	Visitor Service Shop Garden Assistant
Waitress for the Garden Room	Volunteer Gardener
Week Gardener	Volunteer Production Garden Assistant
Ground Maintenance Operative	Waste Ground Operative

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Appendix 3 – Population Frame

Using data provided by Dun & Bradstreet (D&B)²⁵, the starting point was to define the population of businesses to be sampled. An individual business was defined as being either a single site or the headquarters (HQ) site for companies with multiple sites. This resulted in a list of 60 2003 SIC codes which were mapped against 2007 SIC codes to give a best estimate. Cognisant have found that it is common practice for data suppliers to conduct their own mapping exercise when updating SIC codes²⁶. If a company had multiple sites but the HQ site fell outside of this predefined list, then it was the site SIC code that was included in the population, not the HQ SIC. Whilst this increases the potential for double counting of some companies, it does avoid excluding companies who have a subsidiary operation within a target SIC code. Any business identified as a recruitment agency or was not allocated to one of the predefined SIC codes was excluded from this population. This left a total of 980,000 businesses in our target population.

This target population data was then broken down by region and employee size bands as follows:

- Regions used: London, South East, South West, East Anglia, East Midlands, West Midlands, Yorkshire and Humber, North West, North East, Scotland and Wales
- Employee size bands: 26 bands were used. Not all are listed here but the list began with 1 employee and then proceeded as 2-4 employees, 5-9, 10-19, 20-29, 30-39, 40-49, 50-74, 75-99, 100-149 and then progressively wider bands up to 10,000+.

This created 8,167 sub-populations (or cells in statistical terminology), each a permutation of SIC, region and employee size band within the target population. The sampling frame is the explained in Section 3.2.

²⁵ It must be noted that no attempt to correct any deficiencies in the Dun & Bradstreet data has been made. Deficiencies do exist (as they do for any competitor of D&B) and these will impact on the overall accuracy of any estimates made.

²⁶ It should be noted that 2003 and 2007 SIC codes do not map exactly and some generalisations will be made.

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Appendix 4 – Statistical model and estimation method

Statistical model

For each of the 8,167 cells (or sub-populations) in the target population, the following three estimates were required.

1. The percentage of businesses that employ people in the Lantra defined roles.
2. The number of people working in Lantra defined roles.
3. A breakdown of the number of people working in horticulture, landscaping and sports turf.

Using the data collected from all the completed interviews, three statistical models were built.

1. Percentage businesses employing Lantra roles = function of nation*, SIC group, employee size
2. Percentage employees per business in Lantra roles = function of nation*, SIC group, employee size
3. Percentage breakdown by Lantra role type = function of nation* and SIC group.

All three models used the nation* variable where the regions were grouped into four 'nations'; Scotland, Wales, London, England (excluding London). This was done because our models suggested that regions outside of London did not differ to any great degree.

In the survey, respondents were asked how many people worked in their organisation and what the breakdown was across three specific industries (trees and timber (T&T), horticulture and landscaping and sports turf (H&LS) and environmental conservation (EC)). This meant that each respondent could be categorised by the type of roles they employed. It turned out that five permutations of the three roles were apparent in the survey data, as shown below:

- T&T – Trees and timber roles employed only
- H – Horticulture, landscaping and sports turf roles employed only
- E – Environmental Conservation roles employed only
- HE – H&LS and EC roles employed
- THE – All three roles employed.

Primary industries predominantly employed a single type whilst secondary industries usually employ a mix of roles.

For HE and THE businesses we decided to use the simplest model of allocating the number of Lantra employees in these businesses equally to all three roles. Thus for THE companies, 1/3 of Lantra roles are EC, 1/3 are H&LS and 1/3 are T&T.

For each of the 8,167 cells in the target population, the three estimates required (percentage businesses employing Lantra roles, number of people in Lantra roles and breakdown by role type) were made using a mixture of actual sample data and estimates from the statistical models. To illustrate this the cell for SIC code 55.22 (Camping Sites) in Wales for businesses employing between five and nine employees has been used. The calculation sequence is laid below.

1. Dun & Bradstreet say that there are 90 businesses in this cell employing a total of 543 people
2. Cognisant called 16 businesses and obtained responses from five, which leaves 85 that have to be estimated
3. From the five responses, it was found that 20% of businesses employed people in Lantra roles and that 1.2 people per business were in Lantra roles
4. According to the statistical models built, 15.1% of the businesses should be employing people in Lantra roles in this cell and 0.25 employees per business should in Lantra roles in this cell
5. For the 85 businesses not surveyed, we have a choice of using the statistical model or the sample estimate. We decided to use a weighted average of both where the weight for the statistical model is 1 and the weight for the sample estimate is the number of businesses surveyed (five in this case). This creates a synthesised estimate of 19.2% of businesses employing Lantra roles and 1.0 employee per business in Lantra roles for this cell
6. The final estimate for the number of businesses employing Lantra roles is $5 \times 20\% + 85 \times 19.2\% = 17.2$ businesses i.e. we take a weighted average of the sample estimate and the synthesised estimate where the weights are the number of businesses surveyed and not surveyed respectively
7. The survey showed that for this cell, 15% of employers employ T&T roles, 100% have H&LS employees and 75% have EC employees. These proportions add up to more than 100% because employers can employ more than one type of role. By multiplying our estimate of 17.2 businesses by these proportions, we arrive at a breakdown of 2.6, 17.2, 12.9 respectively for the number of business employing T&T, H&LS and EC roles
8. The final estimate for the number of people working in Lantra roles is $5 \times 1.2 + 85 \times 1.0 = 94.2$ employees i.e. we take a weighted average of the sample estimate and the synthesised estimate where the weights are the number of businesses surveyed and not surveyed respectively
9. The survey showed that for this cell, 5% of employees work in T&T roles, 60% in H&LS roles and 35% in EC roles. By multiplying our estimate of 94.2 by these proportions, we arrive at a breakdown of 4.7, 56.5, 33.0 respectively for the number of people working in T&T, H&LS and EC roles

10. The standard deviation for all estimates is also calculated as well. This follows a standard statistical methodology, which is not described here. However unlike the totals estimated in the previous two steps where a weighted of sample and model estimates were, here the sample estimate was used if available provided it exceeded the minimum that would be predicted from statistical theory. Otherwise the model estimate was used instead.

This process was repeated for all cells where survey responses were obtained. For cells with no survey responses, statistical model estimates only were used.

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Appendix 5 – Qualitative research

The qualitative research is based on in-depth telephone interviews with five industry figures from Local Authority horticultural departments (two interviewees), botanical gardens (one interviewee) and green-keepers (two interviewees). These interviews were conducted with heads of service, heads of training and development, and with professional membership organisations. As a result, the findings of this qualitative research should be considered as indicative of wider skills issues within the sector and not a comprehensive exploration.

The qualitative findings presented here corroborate with, and add a certain amount of value to, the quantitative findings regarding skills gaps, hard-to-fill vacancies and drivers.

Skills gaps among new entrants

Practical skills were considered to be a principal skills gap within amenity horticulture, green-keeping and botanic gardening. New entrants were widely quoted as lacking basic day-to-day practical skills, and in many instances basic numeracy and literacy skills.

One council typically takes entrants from deprived backgrounds and through schemes such as the 'future jobs fund' and 'welfare to work'. This often means the authority needs to address basic literacy and numeracy before they can address the fundamental lack of practical skills.

'Half of them don't know what a garden is for, apart from maybe kicking a football.'

Delivery of training was not thought to aid the problems in basic skills. This is due to the fact that basic skills are not taught in relation to the industry within which the entrant will be working.

Within the two Local Authorities spoken to there was divergence in the uptake of apprenticeships. One Local Authority described receiving far fewer applications for a number of fully paid positions than expected, which was felt to indicate a lack of demand for entry into the industry. This was said to be linked with the wider issue of image associated with horticulture and gardening among young people, schools and careers advisers. The association of the sector as being poorly skilled needs to be addressed. One respondent remarked:

'...one of the biggest battles we've got is a perception in this country, and it's tied in with the class system, that if you work with your hands you must be thick basically.'

This poor image problem was not equal among all consultees and sub-industries. For example, green-keeping is seen as a very attractive career to many young people, aided by the huge popularity of golf across the UK.

'You don't have to be Rory McIlroy or Darren Clarke, but [in the green-keeping sector] you can work on a golf course, with a good salary and a nice career path—from just working outdoors to one day looking after The Belfry or St Andrews.'

Skills gaps among existing workforce

Technology developments dominate much of the sector, both in machinery and IT/communication systems. Gaining the skills to use this technology to its optimum, from technician to management, is a challenge across the sector.

Academic skills are steadily becoming more relevant to the industry with changes in working practices and technology. Traditionally, the industry required little or few formal qualifications or higher-level skills, so many existing staff struggle to cope with change and the more scientific approach being advocated across the industry. The low levels of literacy and numeracy in some areas also add to skills challenges

Protection of the environment in all respects is producing a number of challenges in the horticulture, landscape and sports turf industry, not only in the recognition of species (protected, invasive, non-native animal and plant), but the management, regulations and implication of effects (e.g. the use of pesticides), while managing increased biodiversity. These challenges go across all levels of the sector. Within these demands are the sustainable management requirements, including carbon footprinting, fuel efficiencies, waste recycling etc.

Leadership, management and supervisory skills among the more experienced staff have been identified as the major area for concern in previous surveys including the last Sector Skills Assessment (Lantra, 2010). In particular, the biggest difficulty is the transition from craft/technician level to management level. This is a result of the inherent mismatch between the type of practical skills and disposition individuals need earlier on in their careers, against an increasingly professional, scientific and business-orientated approach to the management of parks, green space and gardens.

Particular demands are: customer communication, working with/managing volunteers (both across varying cultural and language barriers) and the increased diversity of skills required in the workforce, especially the public sector (e.g. Street Scene). In addition, income generation and marketing skills for parks and gardens, especially with the emphasis on community involvement ('Localism', Big Society agenda from the Government), in a period of severe austerity, is proving a challenge.

There is some evidence of skills in amenity horticulture being affected by the Government's austerity programme, which is creating skills gaps. The reduction in headcount means that very often the volume of staff with specialist skills and knowledge is being reduced and therefore creating skills shortages. This leads to a situation of 'fire fighting' that doesn't necessarily fit with the strategic needs of the service.

Hard-to-fill vacancies (HtFVs)

One Local Authority stated issues with recruiting for specific technical roles including Landscape Designer, Arborist, Propagator) which, after costly national recruitment exercises, often only receive a handful of applications. This clearly affects the efficiency of the service and as a result there is a need to outline the technical aspects of each job specification in order to attract and recruit a suitable person. To counter this, more succession planning and internal training is required, which is also costly as well as a complex managerial task.

'The effect is that we are unable to fill key frontline posts across quite a few disciplines and that affects services delivered to the public, as well as services delivered internally.'

Drivers

Information technology skills are seen as a key skill gap as processes become increasingly aided by technology (e.g. use of handheld devices). More generally, the increasingly professionalised working practices in the sector mean that higher-level skills will need to be developed.

Among Local Authorities in particular, changes in the funding environment and the promotion of greater civic participation through the 'Big Society' agenda, means that Local Authority managers will increasingly need the skills to engage with their local communities, recruit and manage volunteers and encourage greater teaching and advocacy skills among members of staff.

Another emerging skills requirement among Local Authorities is within diversification. Parks services are increasingly being asked to generate revenue streams through sponsorship with the park manager post now increasingly required to have the skills to help make deals. These include skills in sales, marketing, negotiating as well as some skill in contracting/financing. Future training for managers potentially needs to include elements of the previous in order to meet objectives of increasing unorthodox funding streams.

'If we don't help people to learn the skills such as negotiation, project management and other management practices, the quality of green spaces will reduce further.'

The environment and conservation issues are increasingly important to the work in the industry. Changes in pesticide legislation will have an effect on skills required in the industry alongside drives to reduce water consumption and other inputs.

One respondent particularly welcomed the arrival of the QCF as a development many employers were supportive of. However, because of the fiscal environment, there is still a lack of bite-sized unit-based training with funding bodies providing money for full qualifications and full awards.

'When is the bite-sized QCF going to bounce into life? Only when funding is available.'

There is a trend for people from other sectors and occupations entering horticulture, landscaping and sports turf in later life, but often such individuals lack practical skill.

Other issues

One respondent stated a significant lack of support within the horticulture industry, as well as more generally, for career changers. Many of the skills gaps in the industry are being filled by career changers who are generally self-funded. Career changers bring many additional transferrable and managerial skills along with them that alleviate many of the problems in the industry, and more support/flexibility in funding would be welcome to encourage such career changes.

Appendix 6 – Secondary ‘Hidden’ SIC Codes

The SIC 2007 codes below are those identified as potentially containing businesses employing workers in horticulture, landscape and sports turf related job functions. These SIC codes have been mapped to the SIC 2003 codes used in the LMI study, therefore, not all will be relevant.

SIC 2007	Description
36000	Water collection, treatment and supply
41201	Construction of commercial buildings
41202	Construction of domestic buildings
42110	Construction of roads and motorways
42120	Construction of railways and underground railways
42130	Construction of bridges and tunnels
42210	Construction of utility projects for fluids
42220	Construction of utility projects for electricity and telecommunications
42990	Construction of other civil engineering projects n.e.c. ²⁷ .
43390	Other specialised construction activities n.e.c.
43999	Specialised construction activities (other than scaffold erection) n.e.c.
55100	Hotels and similar accommodation
55300	Camping grounds, recreational vehicle parks and trailer parks
68320	Renting and operating of own or leased real estate
71129	Other engineering activities (not including engineering design for industrial process and production or engineering related scientific and technical consulting activities)
81100	Combined facilities support activities
84120	Regulation of the activities of providing health care, education, cultural services and other social services, excluding social security
85310	General secondary education
85421	First-degree level higher education
85422	Postgraduate level higher education
86101	Hospital activities
87200	Residential care activities for learning disabilities, mental health and substance abuse
87300	Residential care activities for the elderly and disabled
87900	Other residential care activities
88100	Social work activities without accommodation for the elderly and disabled
88910	Child daycare activities
88990	Other social work activities without accommodation n.e.c.
96030	Funeral and related activities
97000	Activities of households as employers of domestic personnel

²⁷ n.e.c. not elsewhere classified

LANTRA

Land-based and environmental skills

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We are an independent, UK-wide organisation that is owned and managed by our industries, which are grouped around land management and production, animal health and welfare and environmental industries.

We lead the way in understanding our industries' future skills and business needs. We work together with trade organisations, unions, training providers, governments and many more to maximise investment in skills.

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