



## The Environmental Conservation Industry in Great Britain

### **Size, Structure and Skills**

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# Foreword

High quality research is central to all Sector Skills Councils. Lantra produces Labour Market Information (LMI) to ensure an extensive understanding of the current and future skill needs of businesses. It is an essential tool for policy makers and researchers responsible for developing evidence-based policy about skills required by industry. It is also invaluable to employers wishing to decide how best to invest in the skills required for their future profitability, and by learning providers to ensure that their programmes are rooted in the current and future needs of their learners.

This research was undertaken by Lantra in order to provide an authoritative account of the business and workforce characteristics of the Environmental Conservation industry. This report has used primary research to gain LMI in addition to that provided through national statistical sources to provide a more complete view of the industry. This report presents information on current and future skills needs as well as the demand for skills and professional development. It identifies the new skills that will be required to ensure the sustainability of the industry, the companies within the industry and the jobs of those employed.

A key outcome of this particular research is to identify businesses/employees within the Environmental Conservation industry that have been 'hidden' in other sectors of the economy or in businesses not captured within Lantra's traditional industry categories. This includes businesses and people employed in organisations such as local authorities, construction, game and wildlife and generally in businesses associated with public areas such as parks and green spaces. As a result, we are for the first time able to present a holistic view of employment in the Environmental Conservation industry. The research has increased our understanding of how many people work in what roles across the breadth of the Environmental Conservation industry.

Through this report we have identified information that can be used to make important changes to benefit those working in the industry. The findings and recommendations can be used as evidence to support the development of education and training policies, support careers information and underpin the development of National Occupational Standards and related training and professional development.

I would like to thank everyone, both individuals and businesses, who have contributed to this research study for their time, many insights and contributions. My thanks also to Cognisant Research who undertook the field work, and colleagues in the research and industry teams at Lantra for their professional expertise without which this report could not have been produced.

Peter Martin  
Chief Executive: Lantra Sector Skills Council

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# The Environmental Conservation Industry in Great Britain: Size, Structure and Skills

## 2011

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# Executive summary

The environmental conservation industry is increasingly important politically, being key to the climate change adaption agenda. As part of Lantra's research strategy, this project identifies the skills needs and challenges within the environmental conservation industry and provides robust Labour Market Intelligence (LMI) on skills issues within these industry groups. We have gained both quantitative and qualitative information on businesses and employees in the environmental conservation industry. In particular the research will gauge the size, structure, and workforce characteristics of the industry and identify 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 an SIC (2007) code for another sector or another industry group within Lantra's footprint.

Over recent years several Acts of Parliament and Government strategies have affected the industry (for example The Marine and Coastal Access Act 2009, Wildlife and Natural Environment (Scotland) Act 2011). As a result, the sector is coming under more scrutiny politically and the environmental and ecological arguments are being brought into economic decisions, and hence the importance of the sector is increasing as is its skill set, which in turn will have implications for skills development.

The environmental conservation industry as defined by Lantra embraces the management of landscapes, habitats and species (in urban, rural, coastal and marine environments) alongside countryside and coastal access, recreation and interpretation to promote awareness, understanding and enjoyment of our rural and urban environments. The disparate nature of the environmental conservation industry has meant an underestimation of primary businesses in the past. This is because existing classification systems did not include other activities associated with environmental conservation occupations (e.g. Marine Consultants, Flood Protection). This research revises upward the number of primary businesses operating in the sector from 1,442 to 2,580.

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 supplemented this quantitative exercise with focus groups and interviews to qualify findings and add further insight.

The scope of the sector increases hugely when looking at environmental conservation occupations employed within wider SIC sectors. Estimates of the number of businesses that contain environmental conservation occupations including secondary businesses equates to around 31,000. It is important to note that this estimate is subject to statistical variation. The true value lies between 23,000 and 39,000, 95 times out of 100. This represents a high margin of error compared to research industry standards, but even with these high standard errors the lower bound estimate identifies an additional 20,000 businesses with some requirement for environmental conservationists across England, Scotland and Wales.

Our estimates of employment in environmental conservation, including the hidden workforce, are some 95,000 individuals (which at a 15% confidence interval relates to between 81,000 and 109,000). This represents a truer picture of the size of the workforce compared with previous estimates. 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 environmental conservation industry.

We estimate, for the first time, the number of businesses in the various sub-industries making up environmental conservation. We found the greatest number of businesses in public access and recreation, followed by landscape conservation, pollution reduction and environmental education and interpretation. The research also provides evidence on the number of volunteers engaged in similar activities, with some 190,000 people participating in 2011.

Lantra's 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. However, hard-to-fill vacancies are particularly prevalent in the sector but not notably greater than other land-based industries. Employers typically provide training over and above legislative requirements and there were significant levels of support for an industry Continuing Professional Development (CPD) scheme with almost two-thirds supporting an industry run scheme. Qualitative research identified skills gaps in the workforce as being traditional rural skills, people skills and management skills. There are barriers to entry for young people (aged 16-21) in the industry due to legislative requirements around health and safety and insurance. Nine recommendations were developed as a result of the research, which are as follows:

- Develop and offer a volunteering training framework to employers to standardise experiences and maximise the value of volunteering for individual development
- Promote the industry in terms of health benefits of physical exercise and working outdoors
- There is a need to develop career progression pathways within the sector highlighting areas of overlap and transferrable skills across land-based and environmental sectors and beyond
- Conduct further research into an industry CPD scheme as there is a significant level of support for such a system
- Encourage Higher Education Institutions (HEIs) to offer flexible, modular short courses derived from existing awards for environmental conservation professionals forming part of a CPD scheme
- Review National Occupational Standards (NOS) and Apprenticeship Frameworks to encourage a shift from in-house apprenticeship schemes to nationally recognised apprenticeships
- Encourage HEIs to incorporate greater levels of practical conservation on degree courses via sandwich placements, work experience and volunteering
- Encourage employers to offer paid internship schemes, work experience, and sandwich placements to develop greater practical understanding among graduates and improve the all-round quality of graduates and career changers
- Promote further training in community engagement and project management skills to increase career progression opportunities

# 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 living being, 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 environmental conservation. The environmental conservation industry in England, Scotland and Wales (GB) has been identified as a research priority in 2011. This research was undertaken alongside research into the trees and timber industry and the horticulture, landscaping and sports turf 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 environmental conservation industry. The scope of the research is also to look at industry specific skills and training issues and identify evidence of innovative practices. All Lantra industries in Northern Ireland were the subject of primary research in 2010 and are therefore not included within this project<sup>1</sup>. 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. Lantra set out to gain both quantitative and qualitative information on businesses and employees in the environmental conservation industry. 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 industry. 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 industry, 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 environmental conservation in consultation with the industry group (IG<sup>2</sup>).

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 environmental conservation 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.

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<sup>1</sup> Primary research for the Northern Ireland-DARD Survey 2010.

<sup>2</sup> Lantra's Industry Group are a representative body of industry specialists incorporating employer, training and education organisations and trade bodies.

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## 2 Context

The environmental elements of Lantra's sector have becoming increasingly important over recent years as the climate change agenda has attracted increased interest from Government at national and international level. There are many policies that relate not only to Great Britain but also to the UK as a whole, and some of these are discussed within the UK and Nation Specific Skills Assessment Reports 2010-11.<sup>3</sup> This includes the UK Low Carbon Industrial Strategy<sup>4</sup>, the UK Low Carbon Transition Plan<sup>5</sup>, the UK Renewable Energy Strategy<sup>6</sup>, the Marine and Coastal Act 2009<sup>7</sup>, Marine (Scotland) Act 2010<sup>8</sup> and the Wildlife and Natural Environment (Scotland) Act 2011<sup>9</sup>.

Some of the most important and/or most recent policies that relate to the environmental conservation industry in Great Britain include the Natural Environment White Paper<sup>10</sup> and the paper Living Wales<sup>11</sup>. Such policies outline Governments' 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.

The environmental conservation industry as defined by Lantra embraces the management of landscapes, habitats and species (in urban, rural, coastal and marine environments) alongside countryside and coastal access, recreation and interpretation to promote awareness, understanding and enjoyment. There are some overlaps with wider environmental management activities including recycling, flood risk management, energy production from waste and pollution reduction.

The industry also covers landscape management at policy, planning and technical levels, together with the maintenance of rivers and waterways. Large organisations involved in this industry include those such as Natural England, Scottish Natural Heritage, the British Trust for Conservation Volunteers (BTCV), Royal Society for the Protection of Birds, the National Trust, the National Trust for Scotland, National Park Authorities, Wildlife Trusts and the Woodland Trust. It is important to note that many other organisations, such as Local Authority Environment Directorates and land-based businesses, will be involved in environmental conservation and consulting to some extent. Agricultural businesses may also be involved in environmental conservation through land management and environmental protection. For these types of organisations, however, environmental conservation is unlikely to form a major part of the business operations.

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3 UK and Nation Skills Assessment 2010/11, available at: [www.lantra.co.uk/getattachment/d1a52232-4f9b-43c7-9a28-fee5a62b02ae/UK-Skills-Assessment-\(2010-11\).aspx](http://www.lantra.co.uk/getattachment/d1a52232-4f9b-43c7-9a28-fee5a62b02ae/UK-Skills-Assessment-(2010-11).aspx)

4 The UK Low Carbon Industrial Strategy, HM Government Department of Business Innovation and Skills and Department of Energy and Climate Change, 2009.

5 HM Government (2009) The UK Low Carbon Transition Plan.

6 HM Government (2009) The UK Renewable Energy Strategy.

7 HMSO 2009, The Marine and Coastal Access Act.

8 [www.scotland.gov.uk/Topics/marine/seamanagement/marineact](http://www.scotland.gov.uk/Topics/marine/seamanagement/marineact).

9 Scottish Parliament: [www.scottish.parliament.uk/s3/bills/52-WildNatEnv/index.htm](http://www.scottish.parliament.uk/s3/bills/52-WildNatEnv/index.htm)

10 The Natural Choice: securing the value of nature (2011).

11 <http://wales.gov.uk/topics/environmentcountryside/consmanagement/nef/?lang=en>

In most cases, an industry can be classified (or defined) by SIC (2007) codes. Lantra's environmental conservation industry is only partially defined by the latest SIC code definitions, specifically 'Environmental Consulting Activities' (SIC 74.90/1). As the industry is not well defined by SIC, in the past Lantra has used Standard Occupational Classification (SOC) codes to identify relevant environmental conservation job roles. The relevant SOC codes within the industry include 'Natural environment & conservation managers' (SOC 1212), 'Conservation and environmental protection officers' (SOC 3551) and 'Countryside and park rangers' (SOC 3552). Volunteers are vital to the success and progress of the environmental conservation industry. 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).

Many environmental problems/challenges do not adhere to geographic borders on land or sea and as such cross into different counties, countries and continents. For example, in the past 12 months in Britain, 15 new Marine Protected Areas have been created to conserve marine biodiversity to add to the 200 already in place. There was also a television campaign to end the waste of fish discards and encourage more sustainable fishing, which brought this issue to the attention of Government.

Therefore although this report covers England, Scotland and Wales, many issues discussed may be national and international challenges or conversely, may be of a very local concern. Environmental issues are not just limited to certain areas, nor are they limited by industry and are frequently featured in the media. Subjects of concern for those working in the environmental conservation industry may also affect those working in Lantra industries as diverse as trees and timber, horticulture, landscaping and sports turf, aquaculture, agriculture, fisheries management, game and wildlife and beyond.

The literature concerning skills in the environmental conservation industry spans the breadth of the industry. These issues along with the arrival of non-native species in Great Britain, new advancements in research, technology and ideology bring with them the need for new and updated skills. The success of conservation schemes and policies are dependent upon the skills of the workforce and its ability to meet the needs of the industry. Keeping abreast of the changing industry and supplying the skills and qualifications to the workforce is at the forefront of Lantra's commitment to the environmental conservation industry, and our research will contribute to this work. Ensuring skills and training to identify and manage species are relevant is central to Lantra's work with the environmental conservation industry.

Scott et al<sup>12</sup> (2008) promote the use of species action plans to create a stronger engagement with aspects of local biodiversity management and the skills associated with this. The Environment Research Funders Forum report 'Review of the Skills Needs in the Environment Sector'<sup>13</sup> identifies critical skills gaps in the environmental conservation sector for the next ten years, in particular postgraduate and professional skills. In total 224 skills needed by people working with the natural environment were identified and 15 critical skills gaps in particular were recognised as being in short supply<sup>14</sup>. These include soft skills such as translating research into plain language and hard skills such as numeracy, computer modelling and field research. It also explains the need for higher-level skills such as the ability to develop and apply new technologies, respond to climate change and improve understanding and knowledge of environmental issues.

A study by the Institute of Ecology and Environmental Management (IEEM)<sup>15</sup> emphasises a shortage of ecologists and environmental managers with the skills to meet the challenges brought by climate change, sustainable development and biodiversity loss. The study found shortfalls in knowledge, specialist expertise and transferable skills in terms of application of new technology. Knowledge gaps included environmental economics, environmental legislation and policy and spatial planning systems, as well as ecological surveying skills, environmental impact assessment, mobile technology and genetics and skills in influencing stakeholder engagement. 2011 is the national year of the volunteer<sup>16</sup>. Volunteers are vital to the success and progress of the Environmental Conservation industry. The National Trust has 61,000 volunteers and they estimate that volunteers contributed approximately 3.5 million hours in 2009-10 equating to £29.2 million<sup>17</sup>. Therefore volunteer skills development and training is of paramount importance to volunteers themselves, their employers and to the industry as a whole.

The sector is certainly attracting greater attention and the environmental and ecological arguments are being brought into economic decisions and hence the importance of the sector is increasing, as is its skill set. This section puts into context some of the main issues facing the environmental conservation industry, and in the next chapters we concentrate on the methodology for this research and later the research findings.

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12 Scott, G. W., Turnbull, S., and Spencer, J., 2008. Promoting Engagement: Using Species Action Plans to bring together Students and Conservation Professionals. Dec 2008. Vol 12 Bioscience.

13 ERF/NERC Postgraduate and Professional Skills Needs Review Output 2 – The Skills Framework for the Environment Sector, October 2010. Available at: [www.nerc.ac.uk/funding/available/postgrad/skillsreview/skills-framework.pdf](http://www.nerc.ac.uk/funding/available/postgrad/skillsreview/skills-framework.pdf)

14 These are also summarised in the summary report; ERF Report Number 7, 'Most Wanted: Postgraduate Skills Needs in the Environment Sector' 2010. Available at: [www.nerc.ac.uk/funding/available/postgrad/skillsreview/summary.pdf](http://www.nerc.ac.uk/funding/available/postgrad/skillsreview/summary.pdf)

15 <http://www.greenwisebusiness.co.uk/news/environmental-skills-in-short-supply-ieem-study-finds-2445.aspx>

16 <http://www.volunteering.org.uk/WhatWeDo/European+Year+2011>

17 National Trust. Going Local Annual report 2009-10.

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### 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 codes for the environmental conservation industry are identified in Table 1 below.

**Table 1 – Environmental conservation industry SIC 2007 codes**

<b>SIC</b>	<b>2007 Description</b>	<b>Lantra industry</b>
01.61/0	Support activities for crop production	Environmental conservation
74.90/1	Environmental consulting activities	Environmental conservation
91.04/0	Botanical and zoological gardens and nature reserves activities	Environmental conservation

There are also a number of other businesses that employ workers in environmental conservation occupations. However, because of the SIC focused method of identifying businesses relevant to the environmental conservation industry, Lantra is concerned that the recruitment skills and training needs of workers operating in environmental conservation roles, but in industries outside the recognised 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 codes in Table 1 but also employed a number of people in environmental conservation job roles were included for this research. Using a database of over 20 million job advertisements<sup>18</sup> posted in the UK over the last years, Cognisant worked with the Lantra research team to identify SIC codes most likely to recruit workers in environmental conservation occupations.

In order to make sure that the logic behind the sample selection was sound, the job roles highlighted were approved by the Lantra's 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.

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<sup>18</sup> Job adverts posted on online job boards and collated by Innovantage

Job titles within 'secondary businesses' were used to capture people working in environmental conservation related roles. A full list of the job titles and SIC codes identified in this search can be found in Appendix 2. A summary of the top 10 job titles, by frequency, is set out below:

- Estate Manager
- Ecologist
- Environmental Adviser
- Environmental Consultant
- Environmental Engineer
- Senior Ecologist
- Environmental Technician
- Ranger
- Senior Environmental Consultant
- Principal Ecologist.

There may be some crossover of these roles with the agricultural/land management and game and wildlife industries. Throughout this report, businesses performing a function traditionally associated with environmental conservation are referred to as primary businesses. Secondary businesses are those outside the licensed SIC codes, but employing workers in environmental conservation related occupations. Combining both primary and secondary organisations gives us the overview of the environmental conservation 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. This does not reflect the full population frame as it was beyond project resources to use that. 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 environmental conservation 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 an environmental conservation 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 environmental conversation industry (e.g. agriculture, trees and timber, horticulture, landscaping and sports turf, aquaculture, fisheries management, game and wildlife) and any other business or organisation (e.g. schools, Local Authority). The relevant SIC code for the sector covers a number of other business types not specifically related to environmental conservation.

SIC Code 74.90/1 (Environmental Consulting Activities) actually covers businesses involved in the following:

- Conservation Organisations
- Damp Proofing and Control
- Energy Conservation Consultants
- Fire and Flood Restoration
- Flood Protection
- Flower Preservation
- Health and Safety Consultants
- Marine Consultants and Services
- Noise and Vibration Consultants
- Water Conservation and Management
- Weather Services.

Therefore, when attempting to target environmental conservation businesses by SIC code, even a focused approach yielded a great many irrelevant returns.

**Table 2 – Environmental conservation sample frame**

	<b>England</b>	<b>Scotland</b>	<b>Wales</b>	<b>Total</b>
Primary target	700	286	309	1,295
Primary achieved	55	9	10	74
Secondary Lantra	719	492	283	1,494
Secondary Lantra achieved	20	7	8	35
Secondary all other	1,693	1,197	575	3,465
Secondary achieved	77	44	35	156
CI @ 95%	17%	30%	30%	15%

The overall response rate was 15%, which is extremely good for a telephone survey. The confidence level<sup>19</sup> of each nation is set out in the table above. It shows that there is a 95% chance that the data collected for the environmental conservation industry, overall, is accurate within  $\pm 15\%$ . 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. Estimates for England are more robust than Scotland and Wales due to larger samples achieved. A full explanation of the statistical model and the estimation method used in calculating the businesses and employee numbers can be found in Appendix 4.

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<sup>19</sup> Confidence Intervals (CI) and confidence levels are statistical measures of accuracy. This report refers to confidence levels of a certain per cent and a CI of 95%. If the confidence level is 15% then the statistic is considered accurate within 15%, 95% of the time.

### **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. Lantra then included the Industry Partnership Manager 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.

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 with responsibility for training and development, in order to ensure the data gathered was fit for purpose.

### **3.4 Qualitative research**

One focus group and a series of individual consultations were undertaken between May 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. The qualitative research, 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' environmental conservation industry

This chapter of the report presents estimates of the size of the environmental conservation 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 as 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 environmental conservation industry. This data relates to the number of businesses/organisations 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 the licensed SIC industries. 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 94,763<sup>20</sup> individuals were identified as working in occupations related to the environmental conservation industry. These individuals were identified as working across 31,186<sup>21</sup> businesses. A breakdown across the nations for these workers and businesses can be found in Table 3 below. These figures include workers and businesses in both Lantra licensed (primary) and unlicensed (secondary) industries.

**Table 3 – Businesses and workforce estimates by nation in 2011<sup>22</sup>**

	<b>Businesses</b>	<b>Workforce</b>
England	26,407	78,901
Scotland	2,634	11,109
Wales	2,146	4,754
<b>Overall</b>	<b>31,186</b>	<b>94,763</b>

20 At the 95% Confidence Interval this estimate is accurate to 15%.

21 At the 95% Confidence Interval this estimate is accurate to 26%.

22 Lantra's Skills Assessment for Northern Ireland, published in 2010, identified 80 business and 600 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 (51.4%) of all businesses, identified as operating in the environmental conservation industry, were small businesses employing one to four people. Small businesses were the dominant feature of all businesses in this industry, across each nation. Figure 1 shows the proportion of businesses in each size category.

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

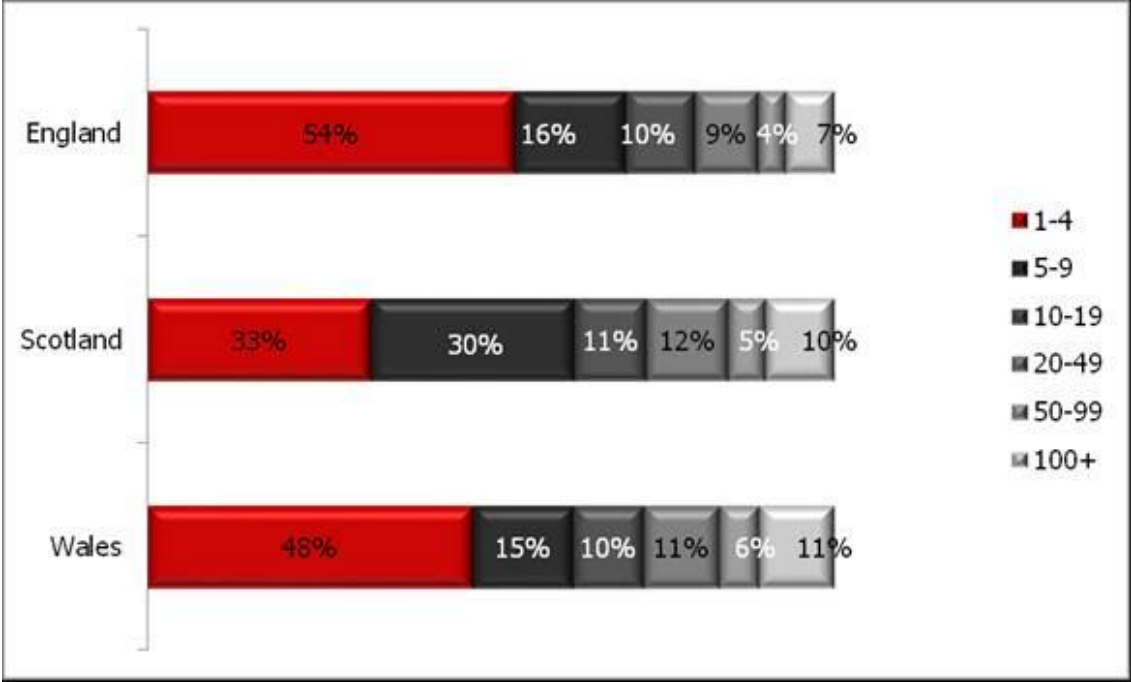


Table 4 sets out the estimated number of businesses by size in more detail. Small businesses were the dominant feature of all businesses in this industry across each nation. However, less than half (33%) of the businesses identified in Scotland employed one to four people. Both Wales and Scotland identified more than 10% of businesses in the largest size category, nearly a third of the proportion of that identified in England (7%). This is due to the fact that a number of organisations have their head quarters in Wales and Scotland and are therefore larger businesses.

**Table 4 – Total number of businesses by size band**

Country	1-4	5-9	10-19	20-49	50-99	100+
England	14,142	4,256	2,653	2,453	1,031	1,871
Scotland	860	778	278	313	139	266
Wales	1,019	311	224	236	124	232
<b>Total</b>	<b>16,021</b>	<b>5,345</b>	<b>3,155</b>	<b>3,002</b>	<b>1,294</b>	<b>2,369</b>
<b>Percentage of total</b>	<b>51%</b>	<b>17%</b>	<b>10%</b>	<b>10%</b>	<b>4%</b>	<b>8%</b>

## 4.2 Estimates by primary and secondary classification

Estimates of secondary environmental conservation businesses are significantly higher than primary estimates. We have estimated that there are 29,000 additional secondary businesses. This demonstrates the breath of the industry operating in a wide variety of areas. Please see Appendix 6 for a list of relevant SIC codes employing environmental conservation professionals outside the industry specific SIC codes licensed to Lantra. The estimated number of businesses classified as primary and secondary is set out in Table 5 below split by nation.

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

Country	Businesses		Total
	Primary	Secondary	
England	1,323	25,084	26,407
Scotland	37	2,597	2,634
Wales	82	2,063	2,145
<b>Total</b>	<b>1,442</b>	<b>29,744</b>	<b>31,186</b>
<b>Percentage of total</b>	<b>5%</b>	<b>95%</b>	<b>100%</b>

Having looked at the number of businesses identified in the primary and secondary categories above, we now go on to look at the number of workers employed to undertake environmental conservation related functions in both categories.

Overall, a very small proportion of all the workers, identified as working in an environmental conservation-related occupation were identified as working in a primary business. Figure 2 shows that the proportions of the workers found in primary and secondary businesses remained relatively consistent across each nation, with Scotland having the largest share of secondary SIC codes.

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

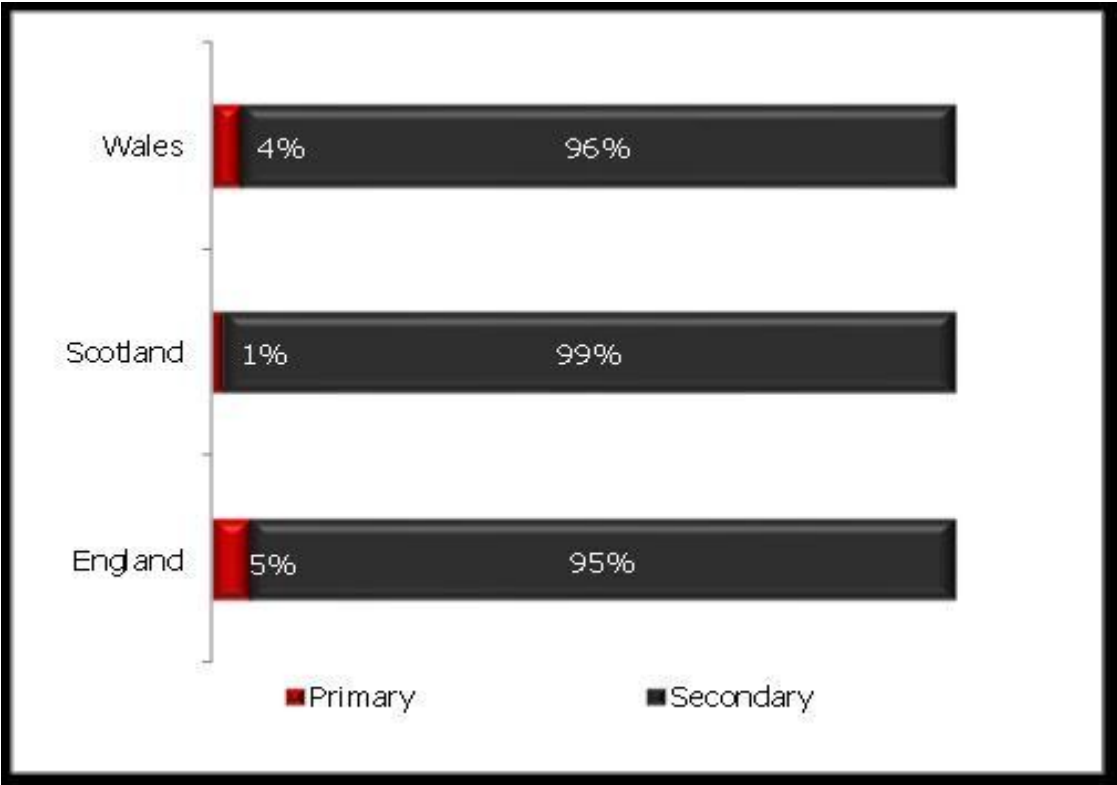


Table 6 sets out the estimated number of workers, operating in primary and secondary businesses across each nation. Overall, 6,593 workers are employed by primary businesses, leaving a further 88,170 workers in environmental conservation related occupations working for businesses not previously considered relevant to this industry. These businesses are in industries such as construction, hospitality e.g. hotels and campsites, and management of real estate.

**Table 6 – Workforce across primary and secondary SIC codes**

Country	Workforce		Total
	Primary	Secondary	
England	5,301	77,273	82,574
Scotland	864	7,492	8,356
Wales	428	3,405	3,833
<b>Total</b>	<b>6,593</b>	<b>88,170</b>	<b>94,763</b>
<b>Percentage of total</b>	<b>7%</b>	<b>93%</b>	<b>100%</b>

### 4.3 Workforce characteristics

Businesses employing workers in environmental conservation related occupations were asked to describe the role the individual was employed to perform. Understanding the job titles of every employee was the method used to identify employees in businesses or organisations not primarily involved in environmental conservation. The job titles have been coded against the SOC codes. Overall, the vast majority (68%) of workers identified were employed at the elementary level. However, 'volunteer' was one of the descriptors used to categorise workers at this level. Environmental Conservation is an industry that attracts a high number of volunteers, which is reflected in the data collected, particularly for England. A breakdown, including examples of occupations covered by each level, is provided in Table 7. It is important to remember when reviewing these statistics that they include all workers in the industry, across businesses traditionally associated with environmental conservation and those not previously defined as relevant.

**Table 7 – Workforce occupational classification breakdown**

<b>Occupational level</b>	<b>England</b>	<b>Scotland</b>	<b>Wales</b>	<b>Overall</b>
<b>Managers and senior officials</b> (e.g. Project Manager, Director of Environment, National Park Officer)	4%	35%	4%	5%
<b>Professional occupations</b> (e.g. Senior Ranger, Senior Ecologist)	8%	12%	6%	8%
<b>Associate professional and technical occupations</b> (e.g. Countryside Officer, Public Rights of Way Office, Education Officer)	2%	15%	87%	14%
<b>Administrative, clerical and secretarial occupations</b> (e.g. Events Organiser, Volunteer Co-ordinator)	1%	6%	2%	2%
<b>Skilled trades occupations</b> (e.g. Dry Stone Walling Contractor)	1%	9%	<0.5%	1%
<b>Personal service occupations</b> (e.g. Community Recycling Officer)	1%	0%	<0.5%	1%
<b>Sales and customer service occupations</b> (e.g. Visitor Centre Assistant)	<0.5%	3%	<0.5%	1%
<b>Transport and machine operatives</b> (e.g. Estate Worker)	1%	2%	<0.5%	1%
<b>Elementary occupations</b> (e.g. Volunteers <sup>23</sup> )	81%	18%	1%	68%

<sup>23</sup> Although it is acknowledged that volunteers often undertake activities at higher occupational levels.

In terms of gender, the workforce in environmental conservation industry as a whole remains dominated by male workers, accounting for 76% of all those employed in the industry with more of a predominance in Scotland and Wales. Table 8 below sets out the proportions of male and female workers employed in each nation.

**Table 8 – Workforce gender breakdown**

Country	Male	Female
England	67%	34%
Scotland	89%	11%
Wales	90%	10%
<b>Total</b>	<b>76%</b>	<b>24%</b>

The majority of the environmental conservation workforce (56%) is aged between 25 and 44. The proportion of workers peaks in the 35-44 age category, which covers nearly 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.

**Table 9 – Workforce age breakdown**

Country	16-24	25-34	35-44	45-54	55-64	65+
England	9%	25%	33%	22%	10%	1%
Scotland	8%	18%	34%	28%	11%	2%
Wales	6%	20%	29%	33%	11%	1%
<b>Total</b>	<b>8%</b>	<b>23%</b>	<b>33%</b>	<b>25%</b>	<b>10%</b>	<b>1%</b>

This data shows a relatively mature workforce, with 57% of workers in all nations aged 35 to 54. There was also a consensus of opinion in the focus group on the absence of new entrants to the sector citing the lack of suitable entry routes and career progression. This was discussed in the context of young people, but the group recognised similar challenges for older volunteers and career changers, which could be addressed through of multidisciplinary ways of recruitment.

'We don't really seem to offer the same routes in for the younger age range or less academic despite the fact that they may have the qualities to be able to do that role. They also need to know if you achieve this qualification this could lead you into jobs with the environment agency or with park rangers or fisheries protection.'

Within the focus group, respondents felt that people still perceive conservation occupations as low paid and low skilled, and there is a need to educate and provide information to show that this is not the case. Marketing and promoting the kinds of jobs available at career and graduate fairs was suggested as a way forward but this is counterbalanced by the fact that contract work seems increasingly popular with employers, where they benefit from the experience of employing someone with practical skills without the long-term employment and training ties. This restricts new entrants into the sector.

Of the workers identified, 2% were classified as migrant workers, the vast majority of which (88%) were EU Nationals<sup>24</sup>. Only 2% of the environmental conservation workers identified were from a non-white ethnic background. A breakdown for this information across the three nations is set out in Table 10 below.

**Table 10 – Migration levels and workforce ethnicity breakdown by nation**

<b>Country</b>	<b>Migrant workers</b>	<b>Non-migrant workers</b>	<b>White</b>	<b>Non-white</b>
England	2.9%	97.1%	96.8%	3.2%
Scotland	0.6%	99.4%	1.7%	1.7%
Wales	0.2%	99.8%	99.5%	0.5%
<b>Total</b>	<b>1.9%</b>	<b>98.1%</b>	<b>97.6%</b>	<b>2.4%</b>

Of the overall environmental conservation workforce, 88% is employed full-time, with 12% employed part-time see Table 11. Of the workers identified, 3% were classified as freelance or self-employed. Of the total workforce, 17% is employed on a seasonal basis.

Environmental conservation is an industry that retains a large number of volunteers. Estimates collected through the survey put the number of people involved in a voluntary capacity, as opposed to those involved in a paid role at nearly twice as many employees (192.8%).

**Table 11 – Employment status breakdown**

<b>Country</b>	<b>Full-time</b>	<b>Part-time</b>	<b>Freelance</b>	<b>Seasonal</b>
England	87%	13%	4%	11%
Scotland	95%	5%	4%	25%
Wales	84%	16%	3%	26%
<b>Total</b>	<b>88%</b>	<b>12%</b>	<b>3%</b>	<b>17%</b>

<sup>24</sup> For the purposes of this study, migrant workers includes both EU and non-EU workers.

Of the workforce, 7% was identified as apprentices. Table 12 below sets out how these apprentice figures break down across each nation. The table sets out a breakdown between those apprenticeships conducted in-house and those that are part of a National Apprenticeship Scheme (NAS). Overall, there is an increased uptake of apprentices as a proportion of the workforce in England compared with that in Scotland and Wales.

**Table 12 – Apprenticeship uptake by nation**

Country	Apprentices, percentage of workforce	Percentage in-house scheme	Percentage national apprenticeship
England	9%	44%	56%
Scotland	2%	42%	58%
Wales	2%	38%	62%
<b>Overall</b>	<b>7%</b>	<b>50%</b>	<b>50%</b>

Businesses indicating that they ran their apprentice scheme in-house were asked how it was funded. The majority (58%) of schemes were provided by 'one-off' grants from funding bodies such as universities or the National Lottery. The rest of the schemes were funded internally by the organisation itself.

Organisations delivering in-house apprenticeship training internally did so because they couldn't find suitable Government funded courses. Either the courses were too basic or not specific to the job in hand. From the focus groups discussions, there is also a need to recruit new entrants into management roles requiring good report writing skills as well as leadership, interpersonal, communication and analytical skills, and there appears to be a high demand for management courses maybe via Higher Apprenticeships. Those already working in the industry don't necessarily want the management jobs 'because the reason that people got involved in the sector was that they are passionate about practical habitat management, for example: there is possibly a misconception that progress means that you sit in front of a computer'.

**4.4 Estimates by sub-industry**

Further to the breakdown of primary and secondary businesses, Lantra also classifies businesses in the environmental conservation industry against nine sub-industry classifications:

- **Landscape conservation (rural, urban, coastal and marine):** organisations involved in the conservation of landscapes, including the UK's 'finest countryside' and project-funded initiatives
- **Habitat conservation (rural, urban, coastal and marine):** organisations involved in land management practices that seek to conserve, protect and restore habitat areas for wild plants and animals, especially conservation-reliant species, and prevent their extinction, fragmentation or reduction in range

- **Species conservation (rural, urban, coastal and marine):** organisations involved in wildlife species conservation
- **Public access and recreation:** maintenance of land the public has legal or permissive access to, including for recreation
- **Environmental education and interpretation:** environmental education (either 'mainstream', including education outside the classroom, or the result of a program or exhibit), presented by either an informational, face-to-face ('instructional') approach, or by using interpretive media
- **Recycling:** the collection, sorting and processing of used materials to minimise waste of potentially useful materials, reduce the consumption of fresh raw materials, reduce energy usage, reduce air pollution and water pollution by reducing the need for 'conventional' waste disposal, and lower greenhouse gas emissions as compared to virgin production
- **Energy production from waste:** waste-to-energy (WtE) or energy-from-waste (EfW) is the process of creating energy, in the form of electricity or heat, by processing waste sources (for example, this can include incineration or anaerobic digestion)
- **Pollution reduction:** pollution control is a term used in environmental management. It means the control of emissions and effluents into air, water or soil
- **Dry stone walling:** a dry stone wall is a wall that is constructed from stones without any mortar to bind them together. As with other dry stone structures, the wall is held up by the interlocking of the stones

These classifications reflect the activity within the environmental conservation industry in which the business or organisation is engaged and vary considerably in size and structure. Given that this project considers businesses engaged in environmental conservation related activities, but for whom these activities are not their primary function, it is often the case that an organisation may employ workers to deliver activities that cover more than one of the above classifications.

Table 13 below estimates the proportion of businesses operating across the environmental conservation sector, in both primary and secondary functions that relate to each of Lantra’s nine sub-industry breakdowns. The largest sub-sector by employment is public access and recreation followed by landscape, conservation, pollution reduction and environmental education and interpretation.

**Table 13 – Number of businesses across sub-industries**

<b>Sub-industry</b>	<b>Businesses</b>
Landscape conservation	4,851
Habitat conservation	1,386
Species conservation	1,040
Public access and recreation	18,712
Environmental education and interpretation	2,079
Recycling	347
Energy production from waste <sup>25</sup>	*
Pollution reduction	2,426
Dry stone walling <sup>26</sup>	*

\*Sample numbers too small for reliable estimates.

It has not been possible to estimate the number of employees relevant to each sub-industry, as employees identified as working in environmental conservation roles were identified only by the occupational level at 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. Also, insufficient data was collected from the study to estimate the number of organisations engaged in energy production from waste or dry stone walling.

## 4.5 Summary of findings

Traditionally, LMI data has been focused solely on the licensed SIC industries. For the first time, this report covers the full scope of businesses and organisations operating in environmental conservation across England, Scotland and Wales.

<sup>25</sup> This largely falls into the footprint of another Sector Skills Council, EUSkills.

<sup>26</sup> It is extremely difficult to qualify the numbers of dry stone ‘wallers’ as there is no regulatory body. The Dry Stone Walling Association has 200 members.

Looking solely at the SIC codes traditionally used to define the environmental conservation industry we can see that an estimated 1,442 businesses operate in this industry as their primary business function. Previous research has struggled to estimate the size of the environmental conservation sector, as it does not relate directly to any one SIC classification. Using other businesses which include environmental conservation associated occupations revised the previous estimate and put the number of businesses at 2,580, and included businesses likely to have engaged in activities related to conservation such as:

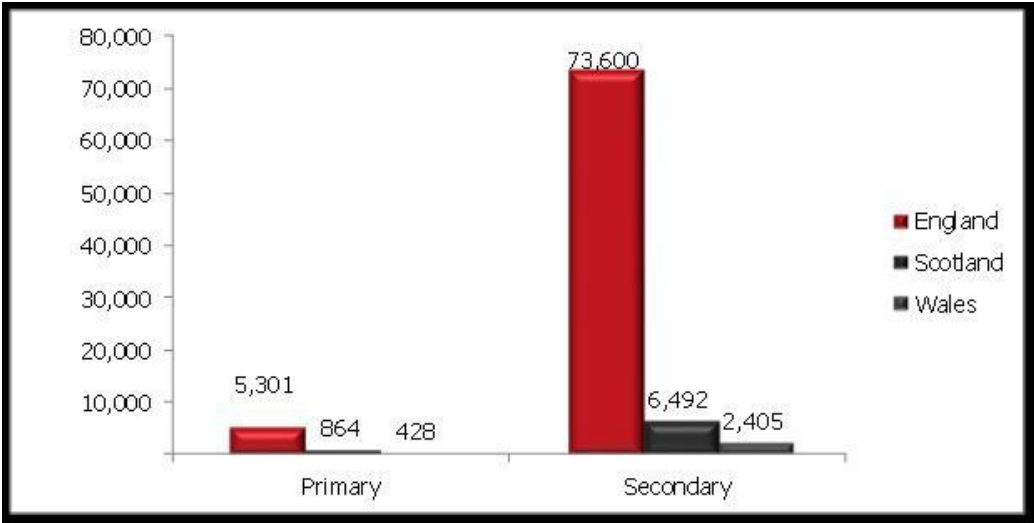
- Flood Protection
- Flower Preservation
- Marine Consultants and Services
- Weather Services

At the primary level, the estimated workforce of 6,593 represents significantly less than the previous estimate of 73,000. However, it is unknown as to what proportion of the previous estimate was made up of workers in businesses referred to above. Indeed, the overall estimate for the number of workers engaged in environmental conservation roles, 94,763, is more consistent with previous estimates, particularly when we consider the secondary organisations employing workers in these roles.

Furthermore, the proportion of volunteers identified as working in environmental conservation businesses appeared to be nearly twice that of paid staff, consistent with the previous estimates that around 200,000 volunteers are involved in these types of activities.

Figure 3 below sets out the size of the environmental conservation workforce across each nation, broken down by whether the individuals are employed by a primary or secondary business.

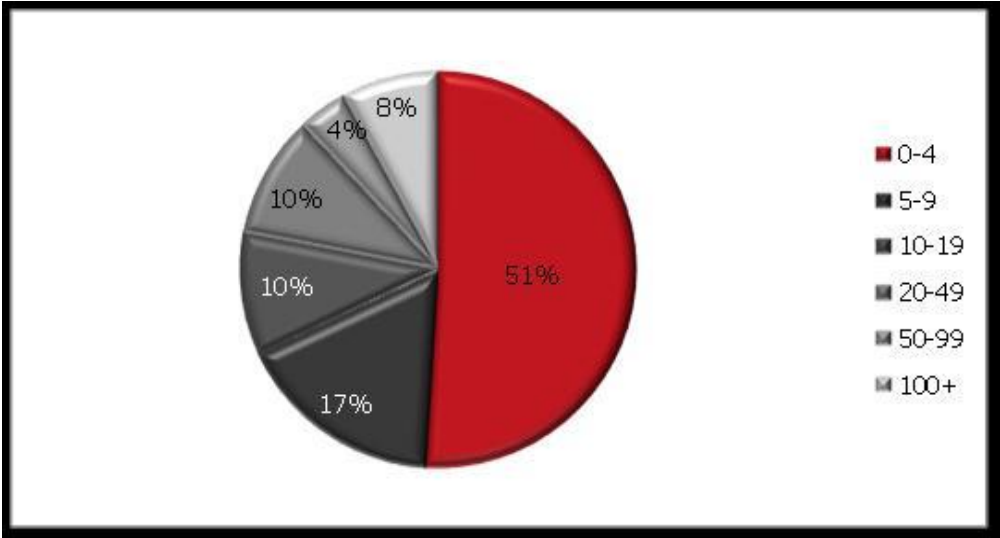
**Figure 3 – Size of workforce across primary and secondary SIC codes by nation**



Further to the breakdown of primary and secondary businesses, Lantra also classifies businesses in the environmental conservation industry against nine industry classifications. Nearly two-thirds (60%) of all the organisations identified in the study were categorised as being involved in Public Access and Recreation.

Including businesses not previously associated with the environmental conservation industry impacts upon the size of businesses operating across the industry. Although the majority of businesses employing environmental conservation workers are still small businesses, employing four or fewer people, this number has fallen from previous industry estimates of 94% to only 51% see Figure 4. Primary businesses in our sector tend to be small businesses but the secondary businesses tend to be larger. The increase in larger businesses could also reflect the fact that environmental conservation workers are employed within larger organisations, or that the large number of volunteers operating in the sector is reflected in the size of the organisations being counted.

**Figure 4 – Businesses by size band**

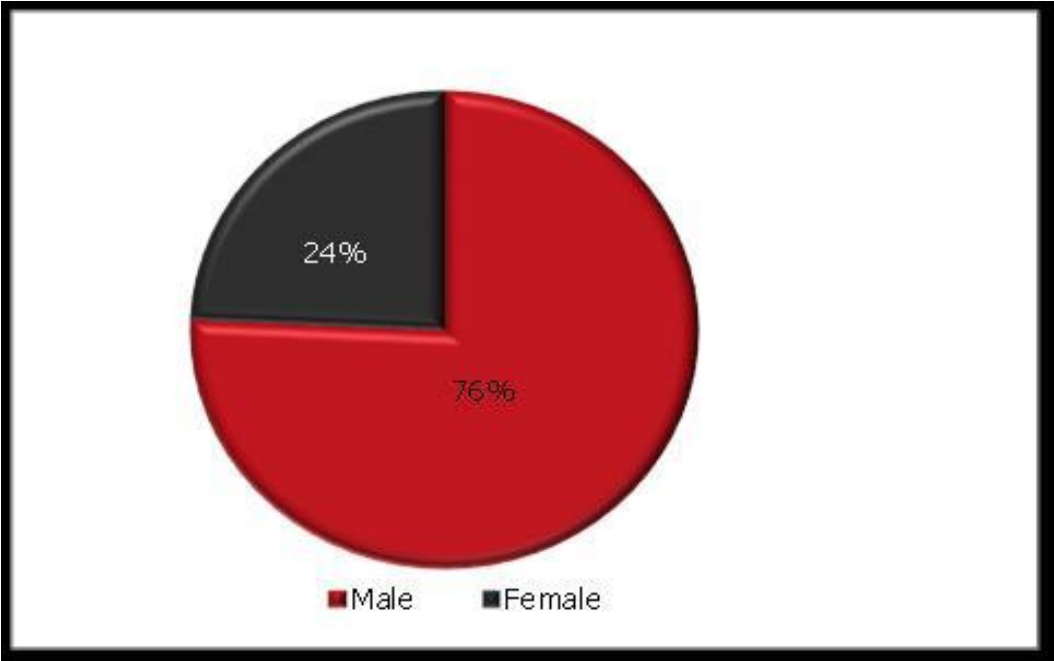


When considering the occupational make-up of the environmental conservation industry, we can see that the majority (68%) of the employees identified worked at the elementary occupation level. The jobs included 'volunteers', which could again account for the large proportion of workers identified at this level. It is plausible that 'volunteers' are working across a number of occupational levels and that there is a need for higher-level skills for volunteers to be made more explicit. Previous estimates put the vast majority of workers in one of the first three occupational levels, yet these did not include businesses outside of the industry that employ environmental conservation workers.

In the focus group the management of volunteers was cited as an equally important skill to have, and respondents all concurred that it was a good idea to have someone in place to manage the volunteers, and make sure they are getting the right kind of support and training that they need. This is particularly important so that volunteers are not just seen as free labour and their developmental needs are considered; volunteers are often trained and assessed informally and the level of training is variable, and often not recorded.

In terms of gender we can see that the workforce remains dominated by men see Figure 5. Including businesses not primarily involved in the environmental conservation industry has changed the proportion significantly, with men still making up around three-quarters of the workforce, at 75.8%, up from 73% previously.

**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 consistent with previous estimates, where 59% of the workforce was aged 35 to 54; that proportion has fallen slightly to 57%.

The ethnic split between white and non-white workers, even including those employed in secondary businesses and organisations, remains dominated by white workers. Whilst previous estimates put this figure at 99%, the latest estimates are 98%. Again, the split between those classified as working full-time and those working part-time has changed little. Where previous studies have identified 87% of the workforce as working full-time, current estimates put this proportion up by only 0.1%.

Of the workforce, 7% was identified as apprentices. Businesses indicating that they ran their apprentice scheme in-house were asked how it was funded. The majority (58%) of schemes were provided by 'one-off' grants from funding bodies such as universities or the Lottery. The rest of the schemes were funded internally by the organisation itself.

The skills implications of those working in environmental conservation roles are considered in the next chapter.

## 5 Skills issues in the environmental conservation industry

This chapter of the report considers issues concerning the recruitment and retention of staff. The results set out in this section consider all businesses employing workers in environmental conservation roles, not just those for which environmental conservation is the primary function of the business. As before, comparison with previous studies should take into account the fact that different types of businesses have participated in this study than was previously the case.

This section relates to all organisations employing workers in the environmental conservation industry, of which 265 were interviewed (see Table 2). Based on an estimated population of 31,186 organisations, this provides a confidence width for data of  $\pm 5.9\%$  at the 95% confidence interval.

### 5.1 Recruitment and retention

Over the last 12 months, businesses relevant to the environmental conservation industry recruited<sup>27</sup>, on average, 1.57 new employees per business. During the same period, 1.23 workers left businesses on average. At the top level, this suggests a small net gain of 0.34 workers in the environmental conservation industry over the past 12 months.

Table 14 sets out a breakdown of the overall numbers joining and leaving environmental conservation businesses across each nation. This table shows that the net gain described above was reflected across all nations.

**Table 14 – Staff movements**

Country	Recruited	Left	Net
England	1.97	1.61	0.36
Scotland	1.35	1.15	0.20
Wales	0.66	0.25	0.41
<b>Overall</b>	<b>1.57</b>	<b>1.23</b>	<b>0.34</b>

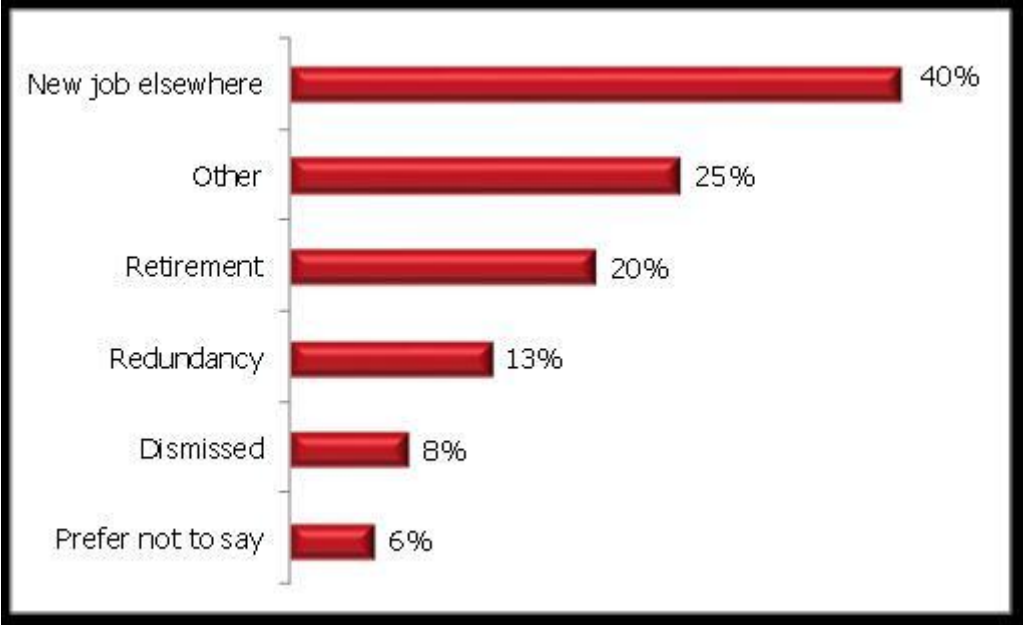
Where a business indicated that staff had left over the last 12 months, they were asked the reason for this. Two-fifths of those businesses indicating that a staff member had left stated that the staff member was leaving to go to a new job elsewhere (40%). A fifth (20%) of businesses indicated that staff had left due to retirement, whilst 13% indicated that staff had been made redundant.

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<sup>27</sup> This refers to the recruitment of paid staff.

Other reasons not covered in Figure 6 below, accounted for 25% of the reasons why staff left in the past year. Most commonly, the reason given was the seasonality of the work or the end of the contract. Fixed-term project staff members are extremely common within the environmental conservation industry.

**Figure 6 – Reasons for leaving employment**



Of environmental conservation businesses interviewed, 11% expected to replace staff over the coming 12 months.

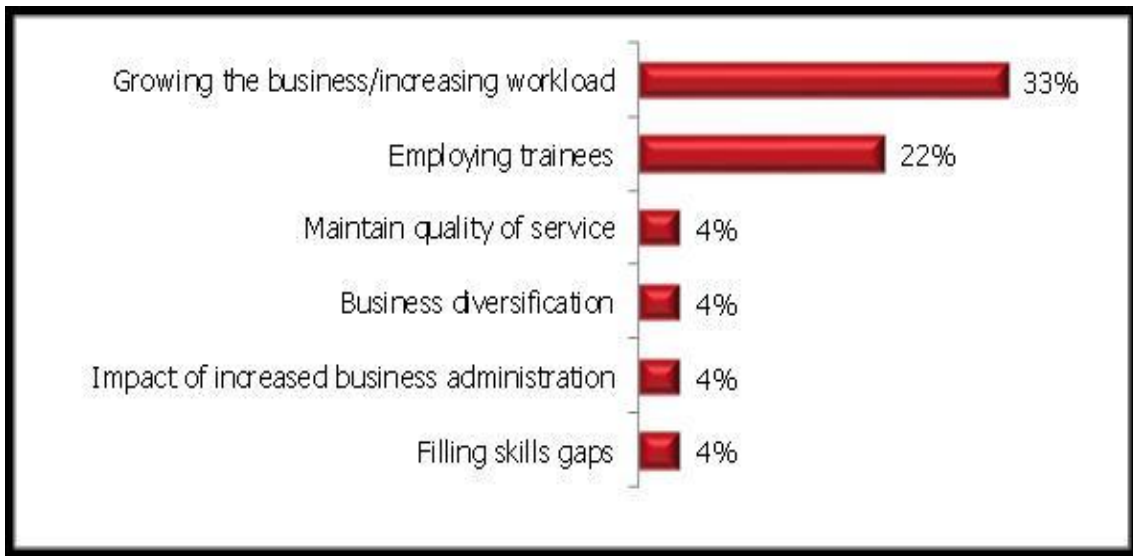
Overall, 10% of those interviewed indicated that they thought staff numbers would increase over the next 12 months, whilst 60% indicated that they were most likely to remain the same. The breakdown shown in Table 15 below highlights the fact that this trend remains consistent across each of the nations, suggesting that the industry has stabilised post recession.

**Table 15 – Anticipated staff changes**

Country	Increase	Remain the same	Decrease	Don't know
England	11%	57%	12%	21%
Scotland	12%	63%	3%	22%
Wales	8%	64%	6%	23%
<b>Overall</b>	<b>10%</b>	<b>60%</b>	<b>9%</b>	<b>21%</b>

Of the businesses indicating that they were anticipating increasing the number of staff in the business, the average number of employees they were looking to take on in the next 12 months was 1.87 (this figure refers to paid staff rather than volunteers). The reasons given for staff joining the businesses were predominantly identified as growing the business (33%) and employing trainees (22%) see Figure 7.

**Figure 7 – Reasons for staff joining the business**



Note: percentages sum does not equal 100% as not all businesses expect staff to join.

Of the businesses indicating that they were anticipating losing staff from the business in the next 12 months, the average number was two. The reasons given for staff leaving were that the business was cutting back, largely due to the political/economic climate, for example Local Authorities receiving reduced funding from Central Government to provide services.

## 5.2 Job vacancies

Overall, the average number of job vacancies identified across all environmental conservation businesses interviewed was 0.11. The vacancies identified are set out in Table 16 below. Of the vacancies identified, around a third were in the professional occupations and a third in the elementary occupations (see Table 16). Where vacancies were present, just under a third (29%) were not being advertised as there appear to be a number of people who work as consultants and often 'word of mouth' is the key to finding a job.

**Table 16 – Total job vacancies across workforce occupational classifications**

Occupational level	Percentage of vacancies identified
<b>Managers and senior officials</b> (e.g. Project Manager, Director of Environment, National Park Officer)	<1%
<b>Professional occupations</b> (e.g. Senior Ranger, Senior Ecologist)	36%
<b>Associate professional and technical occupations</b> (e.g. Countryside Officer, Public Rights of Way Office, Education Officer)	7%

<b>Occupational level</b>	<b>Percentage of vacancies identified</b>
<b>Administrative, clerical and secretarial occupations</b> (e.g. Events Organiser, Volunteer Co-ordinator)	4%
<b>Skilled trades occupations</b> (e.g. Dry Stone Walling Contractor)	14%
<b>Personal service occupations</b> (e.g. Community Recycling Officer)	<1%
<b>Sales and customer service occupations</b> (e.g. Visitor Centre Assistant)	4%
<b>Transport and machine operatives</b> (e.g. Estate Worker)	4%
<b>Elementary occupations</b> (e.g. Volunteers <sup>28</sup> )	32%

From the discussions in the focus group, the problem with vacancies appears to be with job adverts listing 'have a degree' as a requirement; as one participant said:

'...most people with a degree don't have the other skills and actually its people who look after fish at home [who] are the ones we want and the hobbyist because they have more practical skills'.

The challenge seems to be in continuing to advocate the value and relevance of vocational experience, volunteering or the hobbyist person's passion alongside any academic requirements that the industry has. Increasingly job adverts ask for 'equivalent experience' alongside academic requirements due to the multidisciplinary nature of the job and volunteers can often fill these roles as they have gained 'basic' skills required by the industry.

### **5.3 Hard-to-fill vacancies (HtFV's)**

Of the vacancies identified by environmental conservation employers, 18% were considered 'hard-to-fill'<sup>29</sup>. This is lower than that of the trees and timber industry (43%)<sup>30</sup> and horticulture, landscape and sports turf (25%)<sup>31</sup>.

Environmental conservation employers were split in their assessment as to what contributed to hard-to-fill vacancies. A third of employers (33%) indicated that they believed a lack of interest in the job, low pay and benefits and a low number of applicants caused the vacancies that were hardest to fill to remain unfilled.

<sup>28</sup> Although it is acknowledged that volunteers often undertake activities at higher occupational levels.

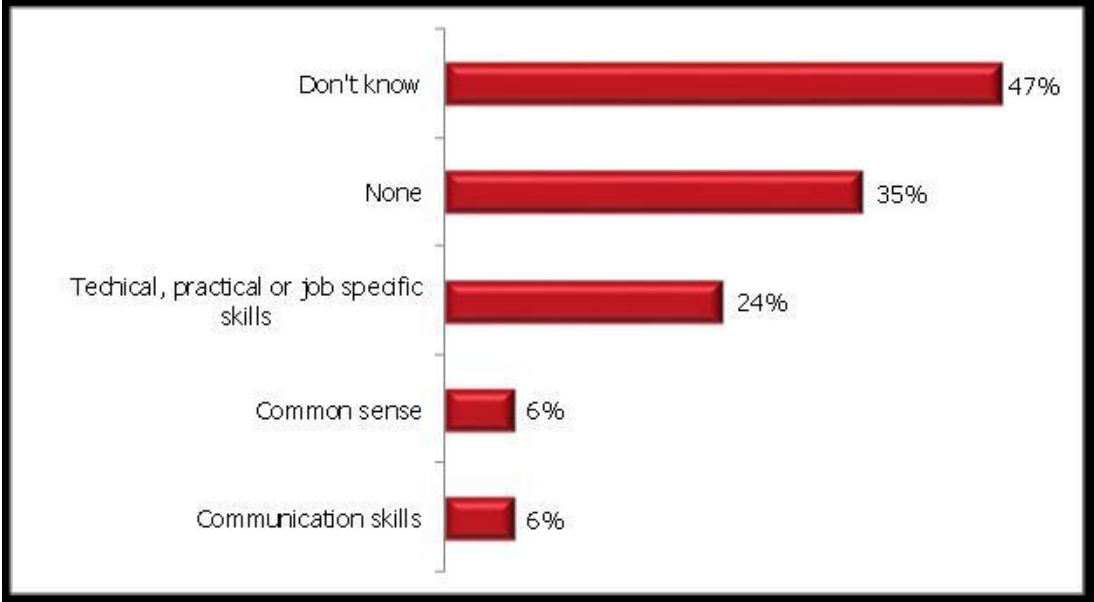
<sup>29</sup> HtFVs are those vacancies described by employers as being hard-to-fill. Reasons often include skills-related issues, but can simply involve such aspects as poor pay or conditions of employment, or the employer being based in a remote location.

<sup>30</sup> The Trees and Timber Industry in Great Britain: Size, Structure and Skills (2011).

<sup>31</sup> The Horticulture, Landscaping and Sports Turf Industry in Great Britain: Size, Structure and Skills (2011).

Figure 8 below sets out the main reasons identified by employers advertising hard-to-fill vacancies.

**Figure 8 – Skills lacking in applicants**



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

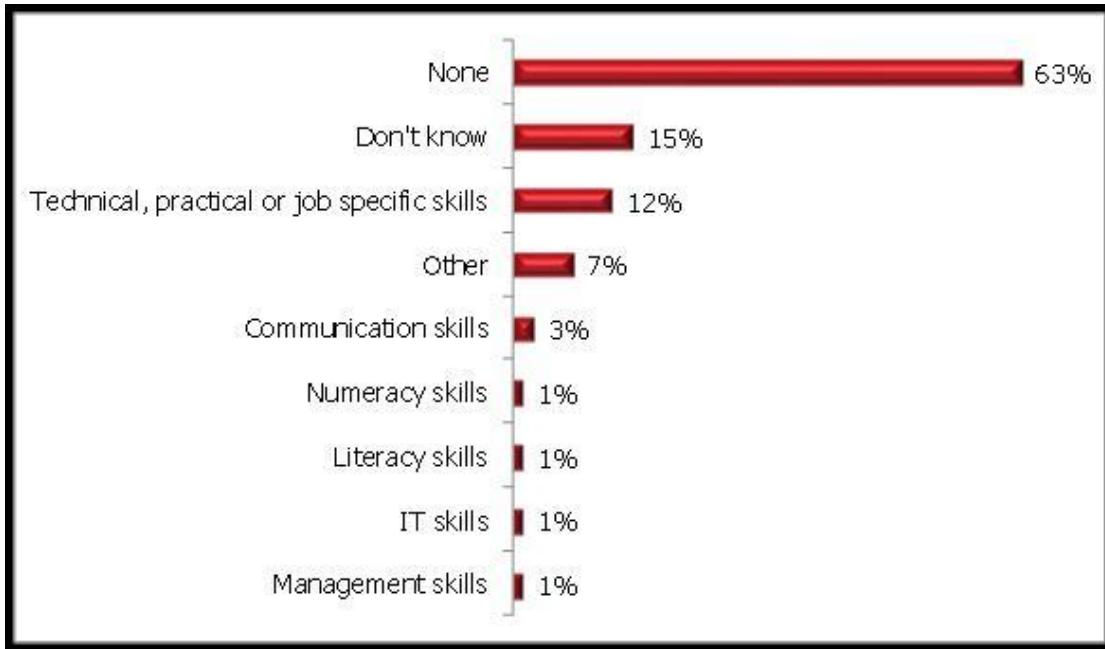
In the telephone interviews, the majority of employers didn't know or said that there were no skills lacking in applicants. However, the focus group confirmed that there appears to be a deficit of higher-level skills required arising from the climate change agenda and its impact on land management. There is a growing demand for soil scientists and people experienced in a mix of hydrology and ecosystems as well as carbon management.

### 5.4 Training gaps

When asked what skills, if any, environmental conservation employers felt their current staff could improve, nearly two-thirds (63%) suggested that none of their employees had any skills that needed improving. There are 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. In addition, this was an unprompted question where respondents were not provided with any examples of skills gaps, and so may have had a limited understanding of the type of skills gaps that were appropriate to the question.

Excluding a further 15% who were unsure, 22% mentioned some skills that needed improving among their staff.

**Figure 9 – Workforce skills to improve**



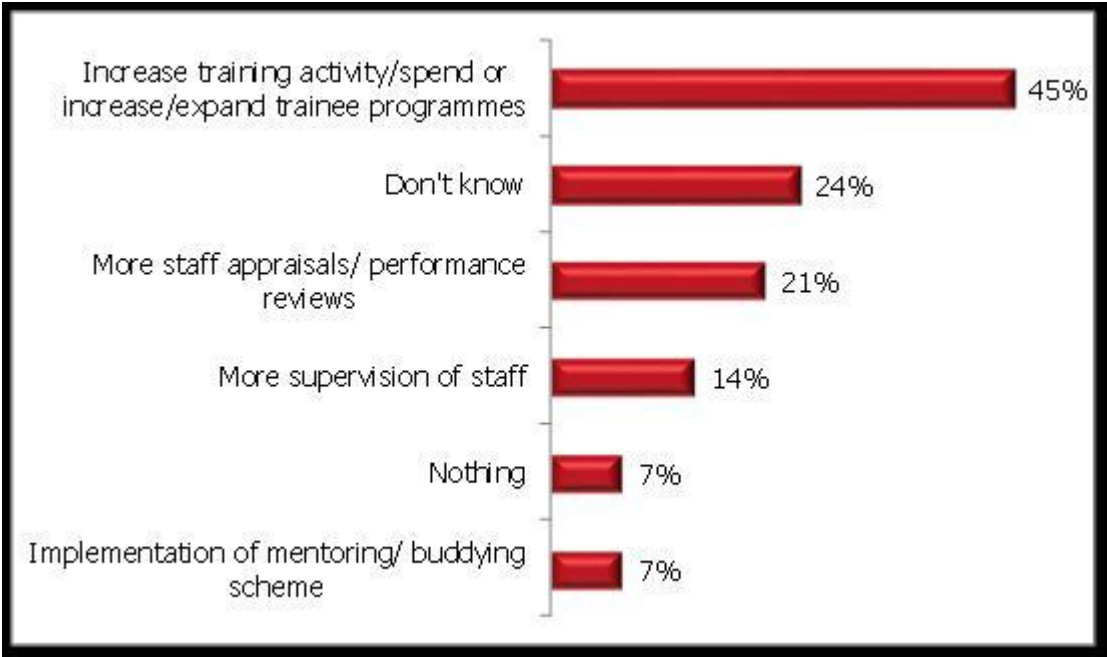
Note: percentages sum does not equal 100% due to multiple responses.

Technical, practical and job specific skills were identified by 12% of respondents. The focus group discussions confirm that these skills predominantly involved fundraising and direct experience of conservation project management. The real skill deficit was said to be in terms of highly qualified individuals lacking the practical skills to do the job. The examples given included 'marine biologist' with very limited practical fish-keeping skills and environmental management graduates lacking basic species identification skills.

In the focus group, the management of volunteers was cited as an important skill to have, and respondents concurred that it was a good idea to have someone in place to manage the volunteers, and make sure they are getting the right kind of support and training that they need. This is particularly important so that volunteers are not just seen as free labour and their developmental needs are considered; volunteers are often trained and assessed informally and the level of training is variable, and often not recorded.

When asked what actions businesses had taken to improve staff skills where required, increased training activity was most commonly identified at 45% (see Figure 10 below). Just over a fifth (21%) of businesses indicated that they undertook more staff appraisals, whilst 13.8% increased supervision.

**Figure 10 – Actions to improve workforce skills**



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

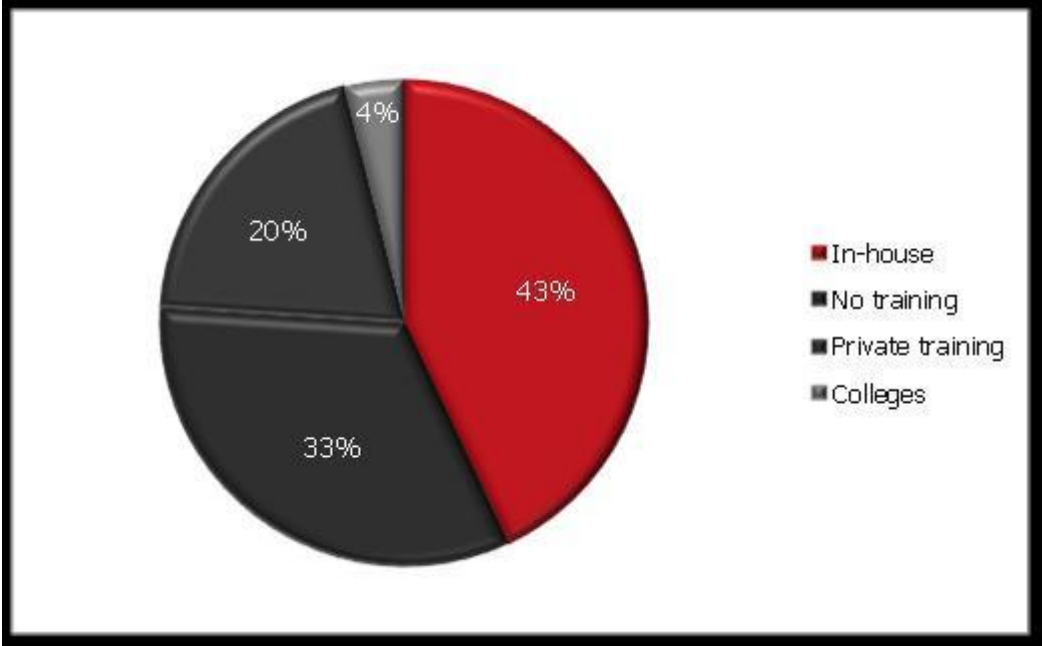
The focus group respondents talked about Higher Education students coming out without the practical skills, and quite often needing to have to retrain at a 'lower' vocational level in order to carry out the jobs. In these cases there may be a lot of resistance from postgraduates who are asked to do a NVQ 2 or equivalent qualification<sup>32</sup>.

When asked how their training is organised, 43% of businesses indicated that they delivered training in-house (see Figure 11). A fifth (20%) of businesses used private training providers, whilst 4% used colleges. A third (33%) of the businesses spoken to indicated that they undertook no training at all.

<sup>32</sup> Level 2 SVQ (SCQF Level 5).

Just over half (53%) of the environmental conservation businesses interviewed delivered training over and above that required by law. The focus group respondents said that IT skills appear not be an issue with the environmental conservation workforce generally, however there was an emphasis on being able to apply map reading skills 'on the ground' for example when waymarking for footpaths etc. Wider knowledge in related topics such as planning, biodiversity, trees and highways was seen as an advantage. Keeping abreast of the legislative changes in terms of the green deal initiatives and European Union agreements appears to be a skills challenge in terms of deciphering what is required immediately and what should be a long-term goal i.e. 'balancing the here and now needs with the long-term nice-to-have needs'.

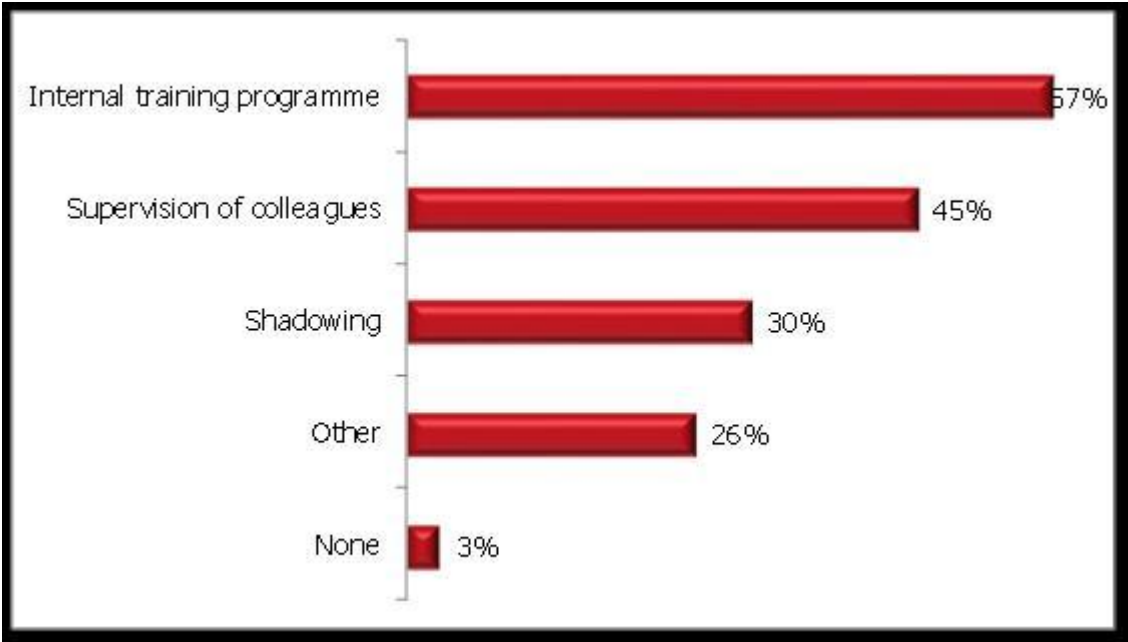
**Figure 11 – Training provider**



**In-house training**

Of the environmental conservation employers indicating that they organised training in-house, just over half (57%) delivered an internal training programme specific to the organisation (see Figure 12). Close to half (45%) used supervision by colleagues and nearly a third (30%) 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. The 'Other' category encompasses mentoring and appraisal systems.

**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, nearly three-quarters (73%) of employers made use of some form of assessment.

**External training**

Of those environmental conservation employers accessing external training, over three-quarters (76%) had used training courses, whilst nearly half (49%) had made use of a conference or seminar. These training courses included accredited, formal or informal courses.

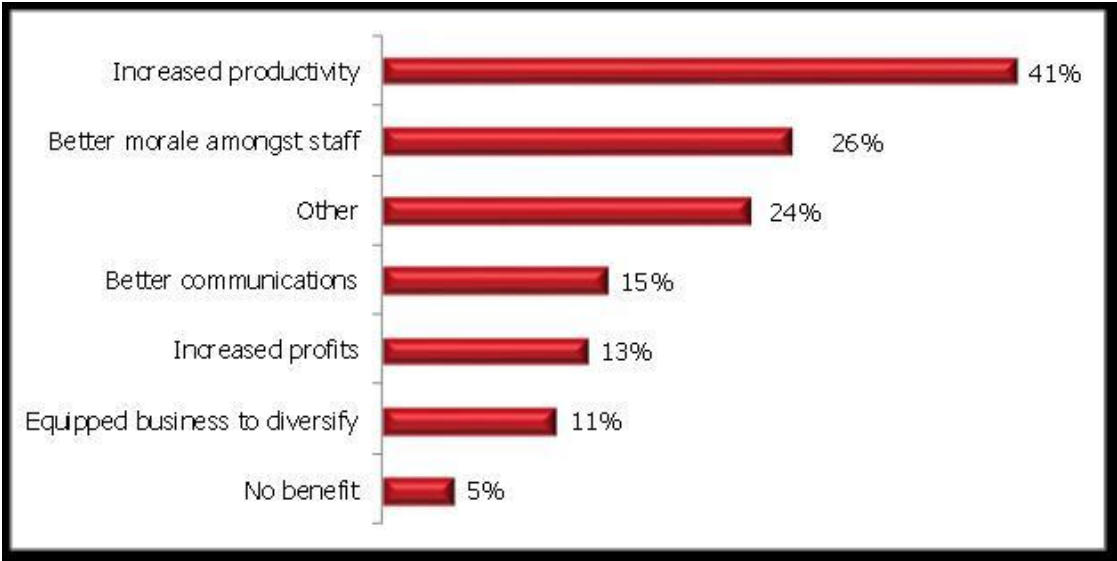
When asked whether businesses employing environmental conservation workers would support an industry run CPD scheme<sup>33</sup>, over half (60%) indicated that they would. However, nearly a third (30%) indicated that they didn't know, suggesting that more information/publicity is required to inform the industry about what such a scheme would entail.

<sup>33</sup> 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.)

**The benefits of training**

Environmental conservation employers utilising training, either internally or externally, were asked what they perceived the benefits of training to be (see Figure 13). Nearly half (41%) indicated that training increased the productivity of their workforce. Just over a quarter (26%) believed that training improved morale amongst their staff. The 'Other' category included more than one benefit.

**Figure 13 – Training benefits**



Note:

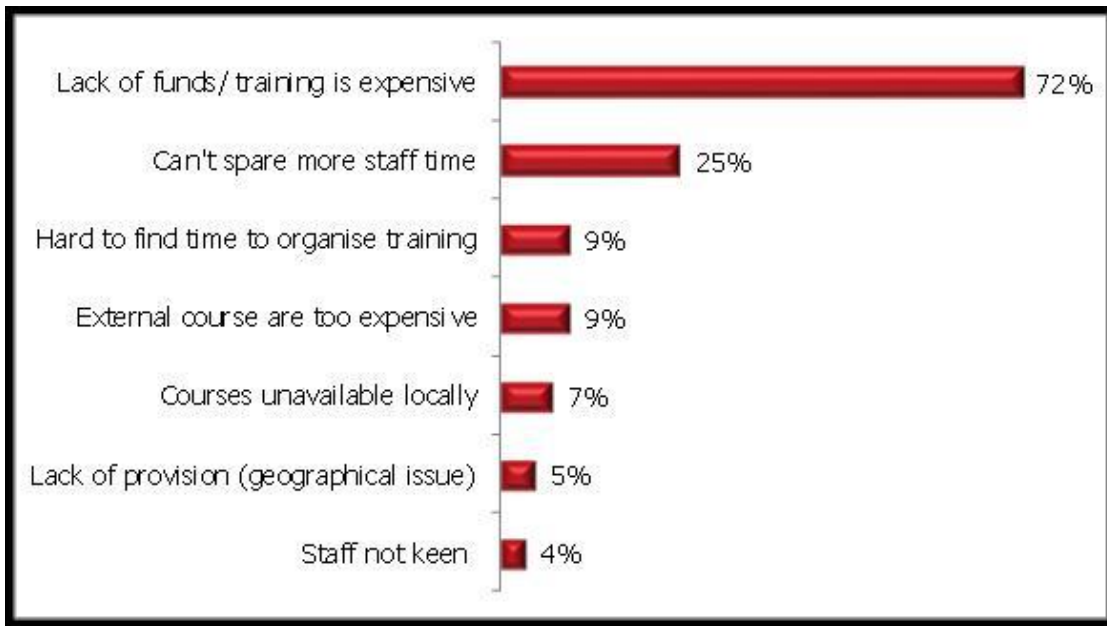
percentages sum does not equal 100% due to multiple responses.

**Training levels over the last 12 months**

Just over a third (35%) of environmental conservation employers indicated that if they could have done, they would have liked to do more training.

Of those environmental conservation employers who indicated that they would have liked to undertake more training, nearly three-quarters (72%) indicated that they lacked the funds to access training. This could be an impact of budget cuts to public funding, or a lack of knowledge as to the types of funding available and/or where to access this. A quarter (25%) suggested that 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.

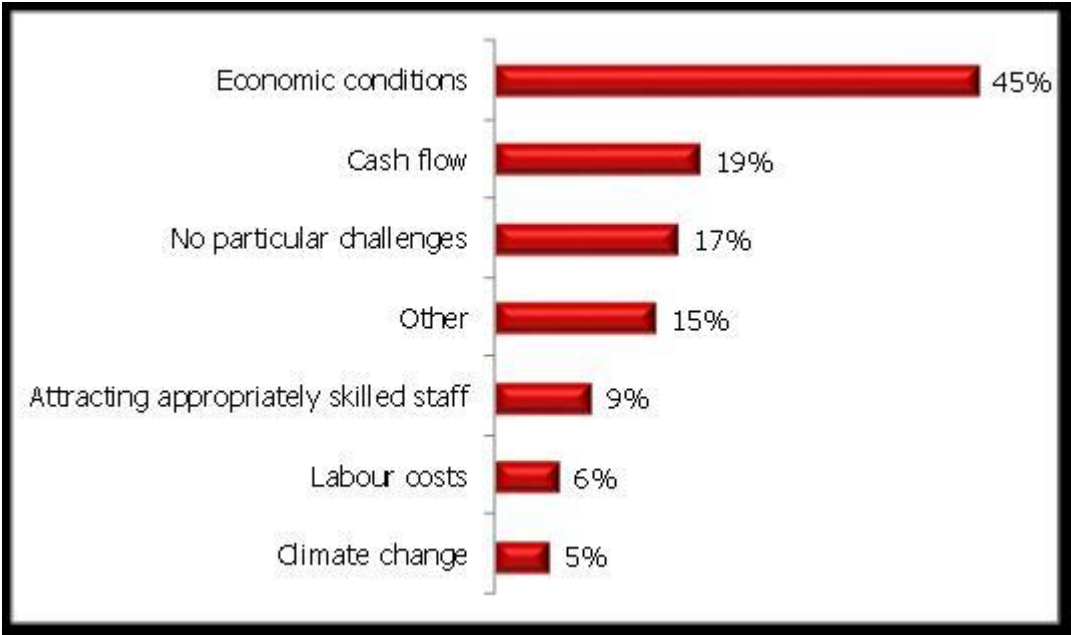
In the qualitative research, respondents mentioned that training often did not cover industry-specific basic skills. There is a trend for people from other sectors and occupations to enter environmental conservation in later life as career changers, who often lack industry-specific skills but bring many transferrable and managerial skills along with them that alleviate problems in the industry. It was felt that more funding to train career changers would be welcomed by industry. Thus the group were advocates for the provision of short bite-sized industry specific provision.

## **5.5 The future challenges in environmental conservation**

The economic conditions (e.g. effects of the recession) were the commonly identified challenges that businesses were concerned about over the next 12 months see Figure 15. This category was identified by 45% of respondents providing an answer to this question.

Cash flow was a concern over the coming year, with just under a fifth (19%) of respondents indicating that money was going to be tight.

**Figure 15 – Challenges over the next 12 months**



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

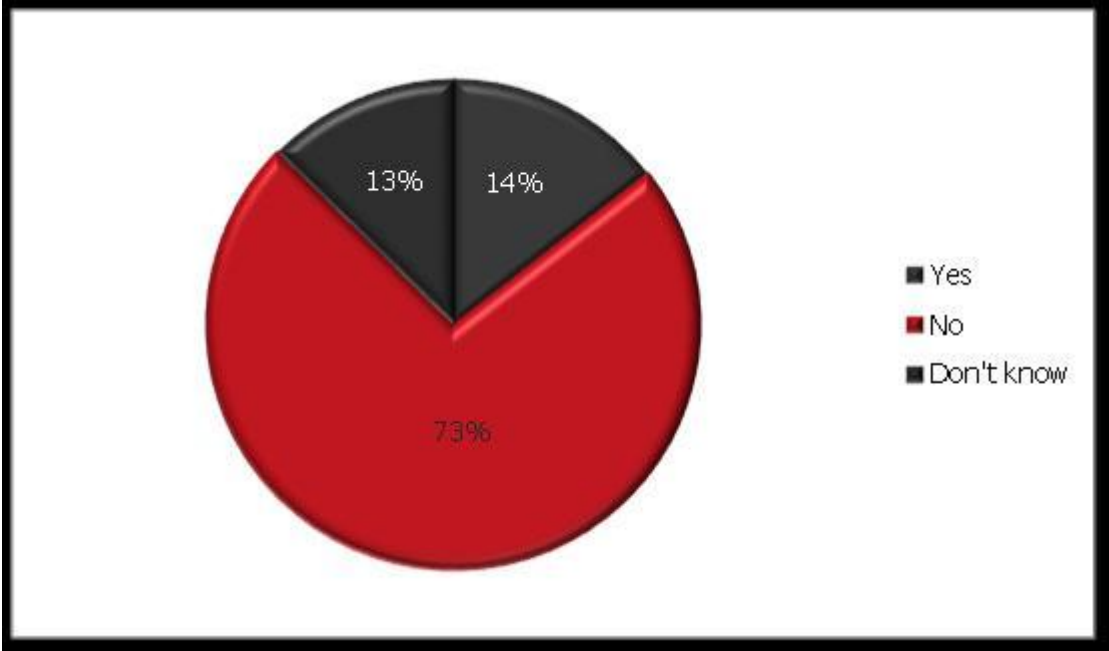
The qualitative research highlighted evidence of the need to retain ‘traditional rural skills’ which are in danger of disappearing and will be lacking in the workforce. These are also referred to as ‘craft skills’, and include skills such as gate making, hedge laying, burning practices, dry stone walling, charcoaling etc. This overlaps with the trees and timber industry research where it was mentioned that traditional woodland management skills were lacking.<sup>34</sup> Another skills gap that has been cited on many occasions is that of ‘people skills’. These encompass a broad range of skills from negotiating skills with a landowner to facilitation skills to work with local communities and fundraising skills.

<sup>34</sup> Lantra: The Trees and Timber Industry in Great Britain: Size, Structure and Skills (2011).

## 5.6 Diversification

Whilst the vast majority of employers interviewed indicated that they did not anticipate diversifying into another area of business over the next 12 months, 14.4% of those interviewed indicated that they were considering such a move see Figure 16. Renewable energy and education and training were the two areas most commonly identified.

**Figure 16 – Considering new business areas**



## 5.7 Environmental conservation 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 (who had consulted the industry group) were collated to produce the environmental conservation skills and business needs summarised below in Table 17.

**Table 17 – Environmental conservation skills issues, business needs and training solutions**

Key issues	Skills needs and training solutions
<ul style="list-style-type: none"> <li>• Compliance with and proactive support for new legislation (UK and international), e.g. with reference to the Marine and Coastal Access Act and the Water Framework Directive</li> </ul>	<ul style="list-style-type: none"> <li>• Increased awareness of marine environment and its management, including appropriate conservation measures and public access</li> <li>• Access to updates/‘plain English’ summaries of relevant legislation and policy information</li> </ul>
<ul style="list-style-type: none"> <li>• Negative impact of economic downturn on income from visitors and new members/membership renewals</li> <li>• Threat to ecology, conservation and access/recreation jobs hosted by Government departments, non-departmental public organisations, charities and Local Authorities (including loss of experienced staff through redundancies leading to a lower-paid workforce with reduced expertise/experience, and compounded by lack of funding to address associated training needs)</li> <li>• Threat to business profitability and sound environmental land management by sporting estate owners, farmers and foresters from potential cuts to public support mechanisms and reduced income from private sources</li> </ul>	<ul style="list-style-type: none"> <li>• Fundraising, wider engagement/business diversification, contract/project management and business management skills</li> <li>• Knowledge of town and country planning/development control legislation and guidance</li> <li>• Improved communication/engagement with planning authorities</li> <li>• Potential to link sound conservation objectives and skills with development initiatives, e.g. green homes or living roofs</li> </ul>

Key issues	Skills needs and training solutions
<ul style="list-style-type: none"> <li>Balancing conservation objectives/access obligations and commercial targets (e.g. income from development proposals vs. statutory access/ecological obligations in a Local Authority context); also continuing need to integrate conservation objectives with sustainable, profitable land management</li> </ul>	
<ul style="list-style-type: none"> <li>Extended, sometimes misleading, use of the term 'environmental' and risk of sound environmental conservation practices being marginalised/messages being 'diluted'</li> <li>Lack of awareness/recognition of industry's contribution to sustainability and climate change targets</li> <li>Diverse industry with lack of strong/unified voice for environmental conservation</li> </ul>	<ul style="list-style-type: none"> <li>Support to secure improved awareness and understanding of sound environmental land management and its contribution to biodiversity, carbon sequestration, renewable energies (e.g. sustainable wood fuels), community cohesion, tourism and health/well-being</li> <li>Improved awareness/understanding (including training) of wider environmental management/environmental assessment</li> <li>Marketing/communication/campaigning skills</li> </ul>
<ul style="list-style-type: none"> <li>Lack of support for volunteers, especially those over 25, both in terms of direct funding and support for the development of managers of volunteers (loss of experienced volunteer managers in economic downturn also an issue)</li> <li>Limited awareness of volunteering opportunities and their potential positive impact on employability and biodiversity objectives (for example)</li> </ul>	<ul style="list-style-type: none"> <li>Volunteer management skills (National Occupational Standards), including health and safety</li> <li>Support to highlight value of volunteers of all ages</li> </ul>
<ul style="list-style-type: none"> <li>Limited practical species identification skills among (graduate level) recruits, impacting on businesses' (and UK) capacity to monitor biodiversity, the impact of interventions such as Environmental Stewardship, and the impact of factors such as pollution and climate change</li> </ul>	<ul style="list-style-type: none"> <li>Field identification skills as a key component of environmental conservation/ecology courses in Further and Higher Education</li> <li>Support for field identification skills training for new entrants (including career changers) and current staff</li> </ul>

Key issues	Skills needs and training solutions
	<ul style="list-style-type: none"> <li>• Help to raise profile of the importance of field ecology skills at a national level, including monitoring impact of Stewardship interventions</li> <li>• Access to wider range of relevant technical skills</li> </ul>
<ul style="list-style-type: none"> <li>• Poor 'fit' of mainstream skills development, training and work-based learning with industry requirements</li> <li>• Inappropriate targeting of mainstream skills development funding, e.g. prior qualifications, geographic constraints, seasonality issues and full cost of high quality delivery</li> </ul>	<ul style="list-style-type: none"> <li>• Support to improve 'fit' of provision to industry requirements, and in the interim for bespoke/project-based skills development initiatives</li> <li>• Increased awareness and understanding of National Occupational Standards, Qualification and Credit Framework and Apprenticeship Frameworks</li> </ul>

## 6 Conclusions and recommendations

### 6.1 The 'hidden' workforce

This research together with other evidence gathered through Lantra's industry engagement suggests the scope of the environmental conservation industry goes much further than official statistics allude to. 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. Our estimates of employment in environmental conservation, including the hidden workforce, are some 95,000 individuals (which at a 15% confidence interval relates to between 81,000 and 109,000). Estimates of the number of businesses that contain environmental conservation occupations equates to around 31,000, a 12-fold increase compared to previous Lantra estimates. It is important to note that this estimate is subject to statistical variation. The true value lies between 23,000 and 39,000, 95 times out of 100, i.e. the true number of businesses would fall between 23,000 and 39,000 if this study were conducted 100 times (statistical tests account for the 5/100 times that the true value does not fall into the range, in this case between 23,000 and 39,000). This represents a high margin of error compared to research industry standards, but even with these high standard errors the lower bound estimate identifies an additional 20,000 thousand businesses with some requirement for environmental conservationists across England, Scotland and Wales.

Environmental conservation workers and professionals are employed across a diverse range of employers including Local Authorities, construction businesses, the tourism industry and many others. We found the greatest number of businesses in public access and recreation, followed by landscape conservation, pollution reduction and environmental education and interpretation. The inclusion of 'hidden' workers in our estimates increases the number of employees in larger organisations, reflecting the fact that these workers are often employed in larger organisations such as non-government organisations, Local Authorities and large construction firms. This represents a truer picture of the size of the workforce compared with previous estimates. Volunteers are also important to the environmental conservation industry. The proportion of volunteers identified as working in environmental conservation businesses appeared to be nearly twice that of paid staff (c.190,000), which is consistent with the previous estimates that around 200,000 volunteers are involved in these types of activities. As a result, the scope of the sector increases hugely when looking at environmental conservation occupations employed within wider SIC sectors.

The disparate nature of the environmental conservation industry has meant an overestimation of primary businesses (i.e. those with licenses within Lantra's SIC code footprint) in the past. This is because existing classification systems included activities not directly associated with environmental conservation occupations (e.g. damp proofing, fire and flood restoration and health and safety consultants). This research revises upward the number of primary businesses operating in the sector from 1,442 to 2,580.

While we are not claiming a definitive figure for the environmental conservation workforce, this research highlights that SIC codes licensed to Lantra systematically underestimate the scale of the environmental conservation industry. Thus, this research recognises the skills needs of the wider workforce (both paid and unpaid) in trees and timber job roles and promote recruitment and career progression. In light of the above evidence our recommendations are as follows:

### **Recommendations**

1. Develop and offer a volunteering training framework to employers to standardise experiences and maximise the value of volunteering for individual development.
2. Promote the industry in terms of health benefits of physical exercise and working outdoors.
3. There is a need to develop career progression pathways within the sector highlighting areas of overlap and transferrable skills across land-based and environmental sectors and beyond.

## **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 and approximately 10% expected an increase in recruitment indicating improving confidence in business prospects.

Hard-to-fill vacancies are particularly prevalent in the sector, some 17.6% of all vacancies identified as being hard-to-fill. This brings the level of hard-to-fill vacancies in line with the broader land-based sector, representing a slightly higher estimate compared with the 16% of all vacancies identified through official statistics.

There is some evidence that employers provide training over and above legislative requirements (53.3%) and this corroborates with the qualitative information. There was also support for an industry CPD scheme, with almost two-thirds indicating they would support an industry run scheme. Further recommendations are therefore as follows:

### **Recommendations**

4. Conduct further research into an industry CPD scheme as there is a significant level of support for such a system.
5. Encourage HEIs to offer flexible, modular short courses derived from existing awards for environmental conservation professionals forming part of a CPD scheme.

One in 20 businesses offered apprenticeships, with an even split of internal and national schemes. Internal schemes were preferred as they were more job specific and have greater availability of funding attached.

Qualitative research identified skills gaps in the workforce as being traditional rural skills, people skills and management skills. There are barriers to entry for young people (aged 16-21) in the industry due to legislative requirements around health and safety and insurance.

### **Recommendations**

6. Review NOS and Apprenticeship Frameworks to encourage a shift from in-house apprenticeship schemes to nationally recognised apprenticeships.
7. Encourage HEIs to incorporate greater levels of practical conservation on degree courses via sandwich placements, work experience and volunteering.
8. Encourage employers to offer paid internship schemes, work experience, and sandwich placements to develop greater practical understanding among graduates and improve the all-round quality of graduates and career changers.
9. Promote further training in community engagement and project management skills to increase career progression opportunities.

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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)
<b>Q0b1</b> Trees and Timber	▪	▪
Horticulture, landscaping and sports turf	▪	▪
Environmental conservation	▪	▪

## **Your business**

### **Q1 How would you classify this business?**

- Private sector business
- Public sector organisation
- Voluntary or charity 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 three 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 is 1 or more)**

\_\_\_\_\_

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

**Work which 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 which 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" - are 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 falls 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  
**b** 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
- Retirement
- Redundancy
- Prefer not to say
- Dismissed
- 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
- Filling skills gaps (Skills gaps exist where employees are not fully proficient at their job.)
- Proprietor spending less time in the business
- Employing trainees
- Impact of increased business administration
- Business diversification
- Maintain quality of service
- 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
- Business closing
- Business cutting back/downsizing
- Staff leave to go to another job
- Not enough people interested in doing this type of work
- Use seasonal labour
- New technology
- Staff leave for other reasons
- Political/economic climate
- Training programme completed
- Other

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
- No
- Don't know

**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:

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**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:

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If 'Management skills' please specify:

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If 'Other' please specify:

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## Training

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

**Code, do not ask.**

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

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

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If Management skills' please state

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If 'Other' please specify:

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**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:

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**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?

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**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:

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**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:

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**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

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**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:

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## 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?

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**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

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**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:**

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**Q30 Any further comments?**

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**Thank you for your assistance.**

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## Appendix 2 – Job titles

**Table A – Top ten**

Estate Manager
Ecologist
Environmental Adviser
Environmental Consultant
Environmental Engineer
Senior Ecologist
Environmental Technician
Ranger
Senior Environmental Consultant
Principal Ecologist

**Table B – Master list of job titles**

Access and Recreation Officer	Access Ranger
Activities/Events Organiser	Activities/Event Officer
Assistant Definitive Map Officer	Biodiversity Officer
Campaigns Officer	Conservation Officer
Conservation Officer Marine	Conservation Volunteer
Conservation Worker	Country Park Manager
Countryside Access Manager	Countryside Access Officer
Countryside Access Team Leader	Countryside Access Volunteer Co-ordinator
Countryside and Park Rangers	Countryside Keeper
Countryside Manager	Countryside Officer
Countryside Officer Ranger	Countryside Worker
Countryside/Environmental Policy Officer	Definitive Map Officer
Definitive Map Team Leader	Director of Environment
Dry Stone Walling Contractor	Dry Stone Walling Fencing Contractor
Ecological Consultant	Ecologist
Ecologist Environmental Scientist	Ecologist Environmental Consultant
Ecologist Senior Ecologist	Ecology Principal
Education/Interpretation Officer	Environmental Conservationist
Environmental Consultant	Environmental Contractor
Environmental Education Officer	Environmental Management Officer
Environmental Officer	Environmental Policy Officer
Environmental Protection Officer	Estate Manager
Estate Manager Property Manager	Estate Ranger
Estate Worker	Events Organiser
Field Worker	Forest Manager

Forest Officer	Forester Ranger
Guided Walks Officer	Head of Conservation
Head of Environment	Head of Rights of Way
Head Ranger/Warden	Improvement Plan Officer
Manager of Volunteers	Marine Scientist Ecologist
National Park Officer	National Trail Officer
Natural Environment and Conservation Managers	Park Ranger
Project Manager Lead Project Manager Nature Conservation	Project Officer Conservation
Promotions Officer	Public Path Officer
Public Rights of Way Officer	Ranger
Recreation Officer	Recycling Co-ordinator
Recycling Officer	Reserve Manager
Rights of Way Inspector	Rights of Way Officer
Rights of Way Team Leader	Rights of Way Technical Assistant
Seasonal Access and Recreation Officer	Seasonal Countryside Officer
Seasonal Ranger	Seasonal Warden
Senior Access and Recreation Officer	Senior Biodiversity Officer
Senior Biodiversity Officer Senior Countryside Officer	Senior Conservation Officer
Senior Conservation Worker	Senior Countryside Officer
Senior Definitive Map Officer	Senior Ecologist
Senior Environment Management Officer	Senior Environmental Officer
Senior Environmental Policy Officer	Senior Estate Ranger
Senior Estate Worker	Senior Field Worker
Senior Nature Conservation Officer	Senior Promotions Officer
Senior Ranger	Senior Rights of Way Officer
Senior Waste Management officer	Voluntary/Seasonal Ranger
Volunteer	Volunteer Co-ordinator
Volunteer Manager	Volunteer Officer
Volunteer Organiser	Waste Management Officer

## Appendix 3 – Population frame

Using data provided by Dun & Bradstreet (D&B)<sup>35</sup>, 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 sixty 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 codes<sup>36</sup>. If a company had multiple sites but the HQ site fell outside of this pre-defined 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 pre-defined 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.

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<sup>35</sup> 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.

<sup>36</sup> 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 Environmental Conservation.

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 Landscape (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:

- THE – All three role types employed
- HE – H&LS and EC roles employed
- T – T&T only
- H – H&LS only
- E – EC only.

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.

## Estimation method

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 55.220 (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, and 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, and 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 Lantra research team conducted a focus group interview in Tiverton (June 2011) to supplement the quantitative research presented earlier in this report<sup>37</sup>. In addition to this, four in-depth telephone interviews were conducted with key industry specialists. Their discussions were transcribed and analysed to bring together key themes and issues.

The qualitative findings presented here corroborate with, and add a certain amount of richness to, the quantitative findings regarding skills gaps.

### Skills gaps in the workforce

The research highlighted evidence of the need to retain 'traditional rural skills' which are in danger of disappearing and will be lacking in the workforce. These were also referred to as 'craft skills' and include skills such as gate making, hedge laying, burning practices, dry stone walling, charcoaling etc. This overlaps with the trees and timber industry research where it was mentioned that traditional woodland management skills were lacking.<sup>38</sup> Another skills gap that has been cited on many occasions is that of 'people skills'. These encompass a broad range of skills from negotiating skills with a landowner to facilitation skills to work with local communities and fundraising skills.

IT skills appear not be an issue with the environmental conservation workforce generally, however there was an emphasis on being able to apply map reading skills 'on the ground' for example when waymarking for footpaths etc. Wider knowledge in related topics such as planning, biodiversity, trees and highways was seen as an advantage. Keeping abreast of the legislative changes in terms of the green deal initiatives and European Union agreements appears to be a skills challenge in terms of deciphering what is required immediately and what should be a long-term goal i.e. 'balancing the here and now needs with the long-term nice-to-have needs'.

There also appears to be a deficit of higher-level skills required arising from the climate change agenda and its impact on land management. There is a growing demand for soil scientists and people experienced in a mix of hydrology and ecosystems as well as carbon management. The real skill deficit was said to be in terms of highly qualified individuals lacking the practical skills to do the job. The examples given included 'marine biologist' with very limited practical fish-keeping skills and environmental management graduates lacking basic species identification skills. The Higher Education students coming out without the practical skills quite often needed to have to retrain at a 'lower' vocational level in order to carry out the jobs and there is a lot of resistance from postgraduates who are asked to do a NVQ 2. The problem appears to be with job adverts listing 'have a degree' as a requirement; as one participant said:

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<sup>37</sup> Two other focus groups were set up in Wales and Scotland but these did not go ahead due to poor attendance and in-depth interviews took place with interested parties.

<sup>38</sup> Lantra: Trees and Timber Industry in 2011, Exploring the hidden workforce, 2011.

'...most people with a degree don't have the other skills and actually its people who look after fish at home [who] are the ones we want and the hobbyist because they have more practical skills'.

The challenge seems to be in continuing to advocate the value and relevance of vocational experience, volunteering or the hobbyist person's passion alongside any academic requirements that the industry has. Increasingly job adverts ask for 'equivalent experience' alongside academic requirements.

Management of volunteers was cited as an equally important skill to have and they all concurred that it was a good idea to have someone in place who will manage the volunteers and make sure they are getting the right kind of support and training they need. This is particularly important so that volunteers are not just seen as free labour and their developmental needs are considered. This was particularly important as volunteers were often trained and assessed informally and the level of training is variable and this is often not recorded.

### **New entrants**

Working with the younger age group was welcomed but there are challenges to overcome. There are various issues around insurance and other Health and Safety issues when working with 16-18 year olds, for example you have to be at least 21 to get insurance to drive a bus.

There was a consensus of opinion in the focus group on the absence of new entrants to the sector citing the lack of suitable entry routes and career progression. This was discussed in the context of young people, but the group recognised similar challenges for older volunteers and career changers.

'We don't really seem to offer the same routes in for the younger age range or less academic despite the fact that they may have the qualities to be able to do that role. They also need to know if you achieve this qualification this could lead you into jobs with the environment agency or with park rangers or fisheries protection'.

People still perceive conservation occupations as low paid and low skilled, and there is a need to educate and provide information to show that this is not the case. Marketing and promoting the kinds of jobs available at career and graduate fairs was suggested as a way forward but this is counterbalanced by the fact that contract work seems increasingly popular with employers where they benefit from the experience of employing someone with practical skills without the long-term employment and training ties. This restricts new entrants into the sector.

There is also a need to recruit new entrants into management roles requiring good report writing skills as well as leadership, interpersonal, communication and analytical skills, and there appears to be a high demand for management courses maybe via Higher Apprenticeships. Those already working in the industry don't necessarily want the management jobs 'because the reason that people got involved in the sector was that they are passionate about practical habitat management, for example: there is possibly a misconception that progress means that you sit in front of a computer'.

## **Other comments**

- Being out and about and working with people means that the industry workforce does develop a lot of good transferable skills
- Environmental conservation has a lot of 'hidden' benefits such for social, health and well-being, fitness and tourism, and it is difficult to put a value on this
- Volunteers work differently to people who have worked in industry, they are not driven by doing things in a certain timeframe and if they do move into paid employment can sometimes find this transition difficult.

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## Appendix 6 – Hidden SIC codes

The SIC 2007 codes below are those identified as potentially containing businesses employing workers in the environmental conservation 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.

<b>SIC 2007</b>	<b>Description</b>
36000	Water collection, treatment and supply
41201	Construction of commercial buildings
43999	Specialised construction activities (other than scaffold erection) n.e.c.
41202	Construction of domestic buildings
42130	Construction of bridges and tunnels
42220	Construction of utility projects for electricity and telecommunications
42990	Construction of other civil engineering projects n.e.c. <sup>39</sup>
42210	Construction of utility projects for fluids
42120	Construction of railways and underground railways
42110	Construction of roads and motorways
43390	Other building completion and finishing
55100	Hotels and similar accommodation
55300	Camping grounds, recreational vehicle parks and trailer parks
68209	Letting and operating of own or leased real estate (other than Housing Association real estate and conference and exhibition services) n.e.c.
68201	Renting and operating of Housing Association real estate
81100	Combined facilities support activities
68320	Management of real estate on a fee or contract basis
71129	Other engineering activities (not including engineering design for industrial process and production or engineering related scientific and technical consulting activities)
84110	General public administration 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

<sup>39</sup> n.e.c. not elsewhere classified

<b>SIC 2007</b>	<b>Description</b>
88990	Other social work activities without accommodation
88910	Child daycare activities
88100	Social work activities without accommodation for the elderly and disabled
91020	Museum activities
93110	Operation of sports facilities
97000	Activities of households as employers of domestic personnel

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# LANTRA

Land-based and environmental skills

Lantra is the Sector Skills Council supporting skills, training and workforce development for businesses in the land-based and environmental sector. We are committed to helping everyone access the training, qualifications, skills and knowledge they need for business success and to develop their career.

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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