LANTRA

Horticulture, landscaping and sports turf factsheet 2010-2011

Horticulture, landscaping and sports turf is a diverse industry including: hard, soft and interior landscaping, sports turf and golf greenkeeping, private, heritage and botanic gardens, commercial grounds, public parks and green spaces. The industry is sometimes known as amenity horticulture.

Overview

Business figures:

- Official figures estimate that there are 16,850 businesses that fall within the horticulture, landscaping and sports turf SIC code in the UK, excluding those employed in local authorities[1]
- Lantra estimates that there are 17,870 businesses in the industry as a whole, including those employed in local authorities[3].

Employment figures:

- Official figures estimate that there are 125,800 people employed within horticulture, landscaping and sports turf industry in the UK, excluding those employed in local authorities[2]
- Lantra estimates that 177,000 people are employed within the industry as a whole in the UK, including those employed in local authorities[4].

Businesses by size:

- Private sector businesses within the horticulture, landscaping and sports turf industry are smaller than the average business size; 94% have a workforce of ten staff or fewer, compared with 83% across all businesses in the UK[1].

Nation/Region	Businesses [3]		Employment [4]	
UK (including local authorities)	17,870[5]		177,000[6]	
UK (excluding local authorities) [12]	17,520	100%	127,750	100%
Northern Ireland	780	4%	4,000	3%
Scotland	1,540	9%	7,650	6%
Wales	1,460	8%	4,900	4%
England	13,760	78%	111,200	87%
East of England	1,880	14%	9,850	9%
East of England	1,260	9%	9,000	8%
London	800	6%	11,700	11%
North East	420	3%	3,450	3%
North West	1,560	11%	12,750	11%
South East	2,840	21%	32,500	29%
South West	2,320	17%	17,000	15%
West Midlands	1,560	11%	7,900	7%
Yorkshire and the Humber	1,140	8%	7,050	6%

Size and scope

- The Office of National Statistics (ONS) provides data for 'landscape service activities' SIC code (81.30), however, the industry is spread across more than 50 different SIC codes so using just this figure underestimates the size of the industry
- To provide nations' and regions' business and employment estimates that more accurately represent the horticulture, landscaping and sports turf industry, data for 'garden design', 'water garden services' has been sourced from Experian and added to the ONS data in order to produce a Lantra estimate
- To provide an estimate for the UK overall we have used ONS data, Experian data and CABE Space estimates for local authorities.

Workforce demographics[12]

Gender [2]			
Male	84%	Female	17%
Age band [2]			
16-24	11%	45-54	28%
25-34	15%	55-64	17%
35-44	26%	65+	3%
Employment [2]			
Full-time	78%	Part-time	22%
Ethnicity [2]			
White	98%	Non-white	2%

Occupations [2]	
Managers and senior officials (e.g. curator ecologist, estate manager, head of horticulture, park manager)	5%
Professional occupations (e.g. landscape garden designer, horticulturist, head greenkeeper, botanist)	2%
Associate professional and technical occupations (e.g. plant pathologist, landscape architect, agronomist, botanist)	1%
Administrative, clerical and secretarial occupations (e.g. landscape officer, parks development officer)	2%
Skilled trade occupations (e.g. gardener, assistant groundsmen, greenkeeper, horticulturalist)	83%
Personal service occupations	0%
Sales and customer service occupations	1%
Transport and machine operatives	1%
Elementary occupations (e.g. general labourer)	6%

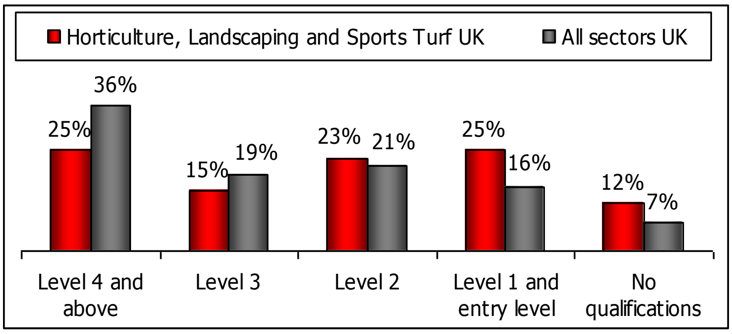
Volunteers[7]

Just under one third of employers surveyed for the CABE Space research said that they use volunteer staff. Together they have more than 39,000 volunteers; that is more than one volunteer for every paid employee. Employees stated that these volunteers perform 164,000 work days a year, equivalent to 683 full-time staff.

Qualification levels[7]

Official statistics[2] show that workers within this industry are often highly skilled but lack formal qualifications.

- 12% of the workforce have no qualifications, almost double the UK average
- A quarter of the workforce are qualified at Level 1
- 23% are qualified at Level 2, around the same level as the UK average
- 15% are qualified at Level 3, and 25% at Level 4 and above, both less then the UK average
- However, CABE Space research[7] shows a different picture. Employers surveyed stated that 44% of their staff were qualified at Level 4 and above, while just 5% did not hold any qualifications.



Learning supply

- Around 1,440 apprentices undertook a framework in horticulture in 2009-10 in the UK[8]
- An estimated 20,800 learners enrolled on qualifications or courses delivered by FE colleges/work -based learning in horticulture, landscaping and sports turf related subjects in the UK in 2008-09 [9]; ranging from professional qualifications to leisure courses. Popular qualifications until 2010 include the NVQ/SVQ in Amenity Horticulture, the Certificate in Horticulture and the Certificate in Gardening
- The industry had an estimated 2,700 learners undertaking related qualifications at Higher Education Institutions in the UK in 2008-09[10].

Employment projections 2010-20[11, 12]

- We forecast a minimum requirement of 11,000 entrants into the industry between 2010 and 2020
- The largest need for people is expected to be for sales and customer service occupations (2,000), managerial occupations (2,000) and elementary occupations (2,000)
- Over the period 2010–20, it is estimated that the following amount of people will be needed:
  - 1,000 at qualification Level 5 (postgraduate)
  - 2,000 people at Level 4 (graduate)
  - 2,000 people at Level 3 (A Level)
  - 2,000 people at Level 2 (GCSE A-C)
  - 2,000 people at Level 1 (GCSE D-G)
  - 1,000 people without any qualifications.

Skills issues

Skills shortage vacancies: green space sector [7]

Certain job roles are difficult to recruit due to a shortage of skills by applicants. Employers in the green space sector cited landscape architects as the hardest to recruit due to skills shortages.

Job roles hard to recruit due to skills shortages	% of employers
Landscape architect	14.9%
Horticulturalist	13.7%
Gardener	12.0%
Greenkeeper/groundsman	11.5%
Tree surgeon	10.3%
Aboriculturalist	9.4%
Parks ranger/warden	5.8%
Ecologist (includes conservation/bio-diversity roles)	5.5%
Landscape/parks manager	5.3%
Landscape planner	3.4%
Allotments officer	2.9%

Priority skills: green space sector [7]

Managerial/strategic skills such as marketing and promoting sites are cited as the highest priority for the green space sector.

Specific skill set	Generic skill set
Marketing and promoting sites	Managerial/strategic
Planning for sustainability and climate change	Managerial/strategic
Design/managing for sustainability and climate change	Technical
IT professional skills	Technical
Networking	Managerial/strategic
Involving volunteers	Managerial/technical
Co-ordinating data collection	Technical
Engaging with the public about green space matters	Managerial/technical (customer skills)
Managing pests and diseases	Technical
Understanding and managing historic gardens and landscapes	Technical
Propagating plants	Technical
Sustaining plant development	Technical
Understanding plant health	Technical
Managing budgets and fundraising activities	Managerial/strategic

Future challenges

Future challenges: green space sector [7]

While 'funding constraints' and 'increasing competition' are pivotal for green space employers, one in seven employers cited 'insufficient skills amongst new entrants' to be of greatest importance over the next two years (2009-11).

Factors likely to affect business	% of employers
Funding constraints	36.6%
Increasing competition	19.6%
Insufficient skills amongst new entrants	15.0%
Skilled employees due to retire	14.3%
Insufficient supply of new entrants	10.7%
None	3.9%

'Skills to grow' strategy priorities [7]

The CABE led 'skills to grow' strategy sets out actions under seven priorities that the green space sector should focus on over the next few years. Employers were asked which three would make the most positive impact on their organisation in the long-term.

Importance of priorities to improve green space skills	% of employers
Develop and maintain a strong evidence base to make the case for investment in green space skills	53.7%
Improve the availability and quality of training, including continual professional development	51.3%
Increase awareness of the sector and the opportunities it offers, to encourage more people into the sector	48.8%
Increase the sector's investment in skills	36.9%
Improve management and leadership skills	35.7%
Increase and improve entry routes and career paths in the sector	35.3%
Build capacity for co-ordinated working across different parts of the sector	29.6%

Drivers for change

Climate change

- Consequences for land managers culminating in changes in business practices
- Impacts on species and plants e.g. local authorities planting drought resistant plants
- Impact on pest numbers/types and disease rates.

Impact on skills

- Continued professional development to keep up-to-date with new pest and disease management
- Similarly introduction of new plants and species will mean need for CPD regarding their management.

Globalisation

- Affects daily performance of businesses primarily through changes in global economic and social conditions (e.g. oil costs, carbon footprint and the economic recession).

Impact on skills

- All staff must have a basic proficiency in ICT due to the nature of the modern workplace, which has a positive effect on the workforce.

Rural and urban regeneration

- Legislation such as 'right to roam' has increased accessibility to the countryside affecting land management (e.g. footpath provision, habitats)
- Child obesity issues have generated a strong need to upgrade available sport and leisure facilities.

Impact on skills

- Need for 'softer' skills such as people management/ customer care skills.

Legislation and regulations

- Businesses needs to stay up-to-date with changing pesticide legislation, in particular as it becomes progressively monitored and enforced
- Industry also subject to national regulated Construction Skills Certification Scheme (CSCS).

Impact on skills

- Need for qualifications which reflect the legislation.

Labour supply:

- Expansion of EU has increased reliance on migrant labour, however not a long-term solution
- More older people retiring than young people entering
- Need to improve further the image of the sector

Impact on skills:

- Migrant labour - language can be barrier to upskilling
- Need for management and leadership skills in order to ensure that skilled staff are retained.

Health and safety:

- Challenges lie in managing, standardising and enforcing health and safety policies and practices.

Economic slowdown

- Impact of the recession including public sector cuts
- Understanding/responding to changing consumer demand
- Urban/rural regeneration

Sources and information

1 Inter-Departmental Business Register (IDBR) 2010 excluding local authorities

2 Labour Force Survey (LFS) 2009-10 excluding local authorities

3 Inter-Departmental Business Register (IDBR) 2010 and Experian National Database 2010 excluding local authorities

4 Labour Force Survey (LFS) 2009-10 and Experian National Database 2010 excluding local authorities

5 Inter-Departmental Business Register (IDBR) 2010, Experian National Database 2010 and CABE Space 2009

6 Labour Force Survey (LFS) 2009-10, Experian National Database 2010 and CABE Space 2009

7 Green space skills: National employer survey findings, CABE Space, 2009

8 Data Service (England), DCELLS (Wales), Skills Development Scotland/Scottish Funding Council (SDS/SFC), DARD/DEL (Northern Ireland)

9 Data Service (England), DCELLS (Wales), Skills Development Scotland/Scottish Funding Council (SDS/SFC), DARD/DEL (Northern Ireland)

10 Higher Education Statistics Agency (HESA)

11 Lantra Model for Employment Forecasting (LMEF) 2010. Figures represent estimates of minimum job openings to satisfy replacement and expansionary demand. This may be higher or lower depending on future conditions

12 Figures and percentages may not add up due to rounding. Percentages are calculated from actual figures.

Lantra website

For further information regarding this factsheet, Lantra and the sector, please visit: www.lantra.co.uk

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