

Green space skills 2009

National employer survey findings

Contents

1. Introduction	6
2. Size and structure of the green space sector	7
2.1 Defining the green space sector	7
2.2 Size of the green space sector	7
2.3 Sector characteristics	9
3. Skills and training challenges	19
3.1 Training in the sector	19
3.2 Qualifications	21
3.3 Skills shortages	23
3.4 Skills gaps	26
3.5 Urban/non-urban local authorities and registered social landlords	31
4. Sector comparisons	37
4.1 Employment	37
4.2 Qualifications	40
4.3 Skills	40
5. Future challenges	43
5.1 The next two years	43
5.2 The economy	44
5.3 The seven priorities	45
Appendices	46
Appendix 1: Methodology	46
Appendix 2: Public green space SIC codes	51
Appendix 3: Survey literal responses	53
Appendix 4: Survey questionnaire	61

CABE is committed to releasing official statistics in line with the principles of the National Statistics Code of Practice and to produce and use official statistics in accordance with the Statistics and Registration Service Act. Not all the statistics contained within this publication are official statistics because it is a compilation from various sources.

Statistician: Trevor Steeples, Communities and Local Government, tel 0303 4442284,
email Trevor.Steeples@communities.gsi.gov.uk

Contents

Tables

Table 1:	Number of organisations in the green space sector in England	7
Table 2:	Number employed in the green space sector in England	8
Table 3:	Percentage of total number of organisations and number employed by organisation type	8
Table 4:	Average number of permanent staff by organisation type	9
Table 5:	Gender balance by organisation type	10
Table 6:	Probable proportions of disabled staff in green space organisations	10
Table 7:	Ethnic balance of employees in green space sector organisations	11
Table 8:	Age profiles by organisation type	11
Table 9:	Full/part-time employment	13
Table 10:	Employment status of employees in green space organisations	13
Table 11:	Employment by grade	14
Table 12:	Green space organisation size by type	15
Table 13:	Function by green space organisation type	16
Table 14:	Role by green space organisation type	16
Table 15:	Percentage of land owners contracting out green space work	17
Table 16:	Types of green spaces where organisations work by organisation type	18
Table 17:	Proportion of work conducted in publicly accessible green spaces	18
Table 18:	Training methods used in the last 12 months by green space organisation type	19
Table 19:	Barriers to training identified by green space organisations	20
Table 20:	Percentage of green space organisations offering work experience	21
Table 21:	Percentage of green space organisations running apprenticeship schemes	21
Table 22:	Average number of apprentices per organisation which offer apprenticeships	21
Table 23:	Qualifications held by employees by organisation type	21
Table 24:	Qualifications held by employees by green space organisation role	22
Table 25:	Awareness of the new diploma in environmental and land-based studies	22
Table 26:	Job roles hard to recruit due to skills shortages	23
Table 27:	Skills cannot afford to recruit	24
Table 28:	Skills bought in by organisation type	25
Table 29:	Priority skills: green space sector	27
Table 30:	Priority skills: public sector green space	28
Table 31:	Priority skills: private sector green space	29
Table 32:	Priority skills: third sector green space	30
Table 33:	Qualifications held by employees in green space organisations(urban/non-urban LAs and RSLs)	31
Table 34:	Percentage of green space organisations offering work experience (urban LAs/non-urban LAs and RSLs)	32

Contents

Table 35: Percentage of green space organisations offering apprenticeships (urban LAs/non-urban LAs and RSLs)	32
Table 36: Awareness of diploma in environmental and land-based studies (urban and non-urban LAs)	32
Table 37: Training methods used in the last 12 months (urban LAs/non-urban LAs and RSLs)	33
Table 38: Hard to recruit job roles (urban LAs/non-urban LAs and RSLs)	33
Table 39: Job roles cannot afford to recruit (urban LAs/non-urban LAs and RSLs)	34
Table 40: Priority skills (urban LAs)	35
Table 41: Priority skills (RSLs)	36
Table 42: Percentage in full/part-time employment: comparisons	37
Table 43: Percentage in permanent/non-permanent employment: comparisons	37
Table 44: Percentage in private/public sector employment: comparisons	38
Table 45: Workforce gender balance: comparisons	38
Table 46: Age bands of workforce: comparisons	39
Table 47: Ethnicity of workforce: comparisons	39
Table 48: Highest qualification level held by workforce: comparisons	40
Table 49: Training spend by SSC sector	40
Table 50: Skills gaps by SSC sector	41
Table 51: Priority skills: green space sector	41
Table 52: Organisations offering work experience: other industry comparisons	42
Table 53: Organisations offering apprenticeships by SSC sector	42
Table 54: Factors likely to affect business by organisation type	43
Table 55: The impact of the recession on green space organisations	44
Table 56: Skills to grow: seven priorities to improve green space skills	45
Table 57: Green space SIC (2007) codes	47
Table 58: Sample strategy for the survey of green space employers	48
Table 59: Target versus actual responses for the survey of green space employers	49

Figures

Figure 1: Proportion of Green space sector by number of organisations	8
Figure 2: Proportion of Green space sector by number of employees	8
Figure 3: Age profile of employees in green space organisations compared with England working population	12
Figure 4: Age profile of employees in green space organisations by organisation type	12
Figure 5: Employment grade by green space organisation type	14
Figure 6: Green space organisation size by type	15
Figure 7: Percentage of green space organisations by function	16
Figure 8: Percentage of green space organisations by roles	16
Figure 9: Percentage of land owners contracting out green space work	17
Figure 10: Types of green spaces where organisations work	18
Figure 11: Training methods used in last 12 months by green space organisation type	19

Contents

Figure 12: Barriers to training identified by green space organisations	20
Figure 13: Job roles hard to recruit due to skills shortages	23
Figure 14: Job roles cannot afford to recruit	24
Figure 15: Skills scoring: green space sector	27
Figure 16: Public sector skills scores	28
Figure 17: Private sector skills scores	29
Figure 18: Third sector skills scores	30
Figure 19: Skills scores (urban LAs)	35
Figure 20: Skills scores (RSLs)	36
Figure 21: Factors likely to affect business (all green space respondents)	43
Figure 22: The impact of the recession on green space organisations	44

1 Introduction

In July 2009 CABE, in partnership with English Heritage and the Heritage Lottery funded, Historic and Botanic Garden Bursary Scheme, commissioned Pye-Tait Consulting to carry out research to identify the total size, scope and labour market status of the green space sector in England. This report presents the findings of that research.

National industry classification systems and datasets covering organisation and employment statistics do not sufficiently represent the green space sector in England, and this research, for the first time, provides data comparable to national datasets for other sectors. The research establishes labour market information, including skill gaps and shortages; sets a baseline to measure the impact of skills improvement initiatives; and identifies the priority skills required in the sector at various levels.

For the purposes of this research the green space sector includes all those employed in the planning, design, management and maintenance of the following types of green space (taken from national planning guidance¹):

- parks and gardens
- natural and semi-natural urban green spaces
- green corridors
- outdoor sports facilities
- amenity green space
- provision for children and teenagers
- allotments, community gardens and city farms
- cemeteries and churchyards
- accessible countryside in urban fringe areas
- civic spaces.

This research focuses on the sector in relation to publicly accessible green spaces.

¹ Office of the Deputy Prime Minister (2002), *Planning policy guidance 17: planning for open space, sport and recreation*

2. Size and structure of the green space sector

2.1 Defining the green space sector

A range of codes from the standard industrial classification (SIC) system 2007 were used, along with a telephone survey, to estimate the number of organisations and people employed in work related to publicly accessible green spaces.

SIC 2007 industry sectors were identified where the principal functions (greater than 50 per cent) add value to publicly accessible green spaces. These codes do not fully represent the green space sector but they contain the majority of it. Full details of the methodology are contained in Appendix 1.

2.2 Size of the green space sector

Tables 1 and 2 illustrate the size of the green space sector in terms of the number of organisations and the number of people employed.

The green space sector as a whole employs about 488,277 people across England in 21,675 organisations. Of these, it is calculated that the green space sector consists of about 15,000 organisations employing about 121,000 people.

Table 1: Number of organisations in the green space sector in England

SIC code	SIC description	Total number of organisations (England)	Number of organisations in green space sector			
			Total	Public sector	Private sector	Third sector
8411	General public administration activities	2,255	358	358	-	-
8412	Regulation of health care, education, cultural services and other social services, excluding social security	80				
7111/2	Landscape architectural activities	780	757	-	757	-
8130	Landscape service activities	13,180	12,771	511	12,005	255
9104	Botanical & zoological gardens & nature reserve activities	255	194	109	50	35
6820/1	Renting and operating of housing association real estate	5,125	782	-	-	782
Total		21,675	14,862	978	12,812	1,023

* Source: UK business activity size and location 2009, table B3.4

Table 2: Number employed in the green space sector in England

SIC code	SIC description	Total number employed (England)	Number employed in green space sector			
			Total	Public sector	Private sector	Third sector
8411	General public administration activities	293,622	53,920	53,920	-	-
8412	Regulation of health care, education, cultural services and other social services, excluding social security	58,064				
7111/2	Landscape architectural activities	4,421	4,289	-	4,289	-
8130	Landscape service activities	43,053	41,717	1,669	39,213	835
9104	Botanical & zoological gardens & nature reserve activities	13,868	10,550	5,917	2,737	1,896
6820/1	Renting and operating of housing association real estate	75,249	11,481	-	-	11,481
Total		488,277	121,957	61,506	46,239	14,212

* Source: ONS *Labour Force Survey* (Q3 2009 data)

Table 3: Percentage of total number of organisations and number employed by organisation type

Sector	Organisations	Employment
Public sector	6.6%	50.4 %
Private sector	86.5%	37.9%
Third sector	6.9%	11.7%
Total	100%	100%

The public sector employs half of those engaged in green space activities. The private sector employs over one third, while the third sector employs about one tenth. The private sector dominates the green space sector when it is measured in terms of business organisations (see Figures 1 and 2).

Figure 1: Proportion of green space sector by number of organisations

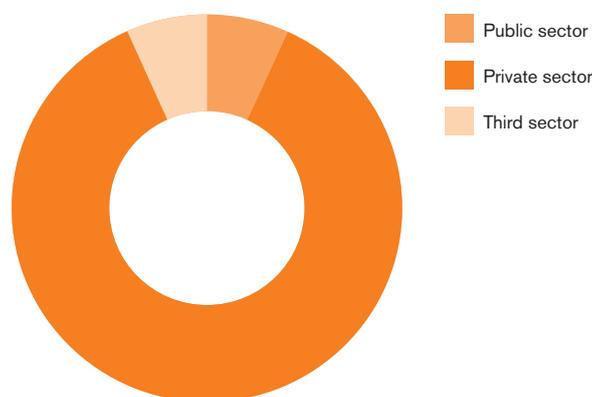
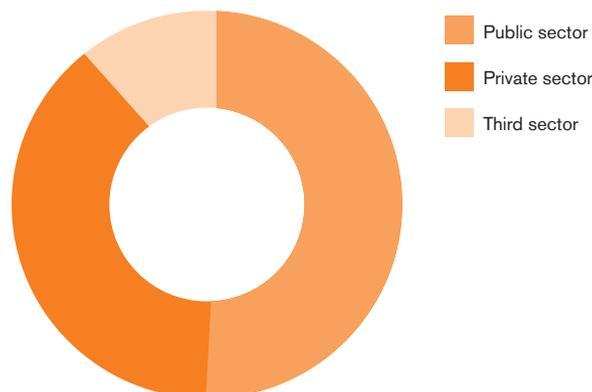


Figure 2: Proportion of green space sector by number of employees



2.3 Green space sector characteristics

2.3.1 Green space workforce

A telephone survey (see Appendix 4) obtained responses from 1,075 green space employers of some 36,000 people working in the green space sector (approximately 6.7 per cent of the sector's organisations, employing between 22-26 per cent of its employees). On average, these organisations undertake just over half of their work in green spaces.

The following section summarises the findings on the key characteristics of green space sector organisations and their employees, using the questions asked in the survey. Comparisons to the England workforce average are included in some cases so that the information can be seen in context.

Q: How many staff do you employ?

Organisations operating within the green space sector tend to be relatively small. The average number of staff is just under 35.

Public sector organisations responding to the survey employ an average of 70 staff, while the average for the private and third sectors is less than 20.

Table 4: Average number of permanent staff by organisation type

Public sector	70.3
Private sector	18.9
Third sector	19.3
All	34.7

Q: What is the percentage split between male and female staff?

The balance of employment by gender reported by the sector as a whole is a split of 71 per cent male and 29 per cent female. The green space sector employs more males than average across England. Of the three business types, the third sector displays a pattern that is closest to the national profile.

Table 5: Gender balance by organisation type

Gender	England people in work*	All green space organisations	Public sector	Private sector	Third sector
Male	53.3%	71%	70.3%	73.0%	65.4%
Female	46.7%	29%	29.7%	27.0%	34.6%

* Source: ONS Employment September-November 2009

Q: What proportion of your staff have a disability that substantially limits their day-to-day activities, or affects the kind or amount of work they might do?

Green space sector organisations responding to this question employed an average of 8 per cent staff with disabilities. This compares with a national average of 19 per cent of the workforce who are classified as disabled under Disability Discrimination Act definitions².

However, figures for staff with disabilities were reported by a relatively small number of organisations, in particular in the private sector (17 per cent of the private sector organisations responding to the survey answered this question). Due to this relatively low number of respondents, the margin of error on this issue is potentially high (see Table 6 and Appendix 1).

Table 6: Probable proportions of disabled staff in green space organisations

	All green space organisations	Public sector	Private sector	Third sector
Average percentage of disabled staff	8.0%	5.0%	8.5%	4.3%
Probable percentage given the margins for error ³	5.46-10.46%	4-6%	4.6-12.4%	0.1-8.5%

² Labour Force survey June 2006; also see the Employers' Forum on Disability (www.efd.org.uk)

³ All margins for error are calculated to the 95% confidence interval.

Q: What proportion of your staff identify with the following ethnic groups?

Table 7 shows that the sector is predominantly white, with higher than the national proportion of white workers – particularly in the private sector.

Table 7: Ethnic balance of employees in green space sector organisations

Ethnic group	England *	All green space organisations	Public sector	Private sector	Third sector
White	86.6%	96.8%	96.1%	97.3%	96.3%
Mixed	2.1%	1.0%	1.4%	1.0%	0.3%
Asian or Asian British	5.9%	0.8%	0.6%	0.7%	1.7%
Black or Black British	3.5%	0.7%	0.9%	0.4%	1.2%
Chinese	0.6%	0.1%	0.0%	0.2%	0.0%
Other ethnic group	1.3%	0.6%	1.0%	0.3%	0.5%

* Source: ONS Population Trends, 138, Winter 2009

Q: What proportion of your staff are in the following age groups?

Table 8 and Figure 3 show that more than half (53.8 per cent) of the sector's employees are aged over 40. This is slightly higher than the percentage over 40 in the England working population, (50.1 per cent). The green space sector also has a lower percentage of under 25s than the England working population at 8.9 per cent as opposed to 17.8 per cent. The private sector profile is slightly younger than the public and third sectors.

Table 8: Age profiles by organisation type

Age band	England (people in work)	All green space organisations	Public sector	Private sector	Third sector
16-24	17.8%	8.9%	6.7%	10.0%	9.1%
25-39	32.1%	37.2%	37.4%	38.1%	33.5%
40-59	40.9%	47.9%	50.3%	46.4%	49.0%
60-64	7.8%	5.1%	5.4%	4.4%	7.3%
65+	1.4%	0.8%	0.3%	1.1%	1.0%

Figure 3: Age profile of employees in green space organisations compared with England working population

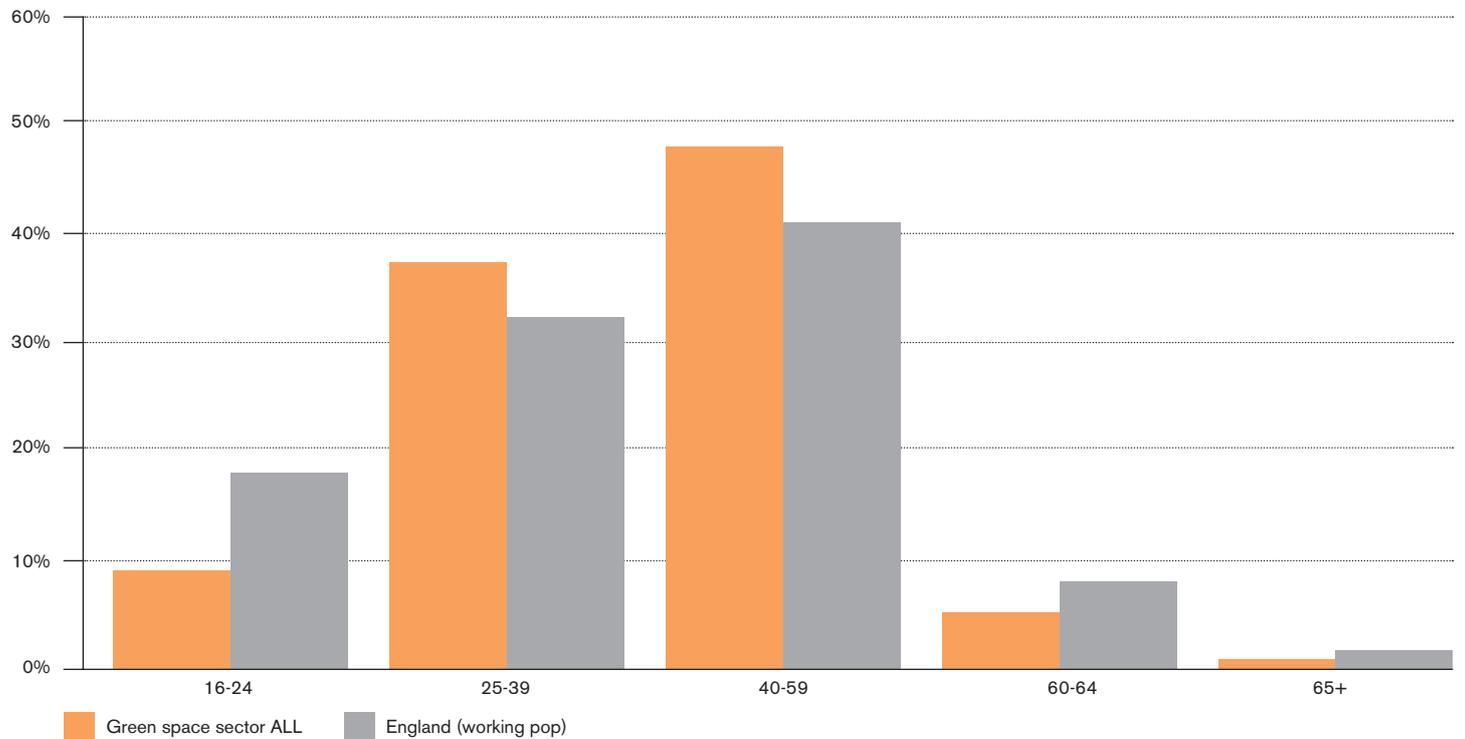
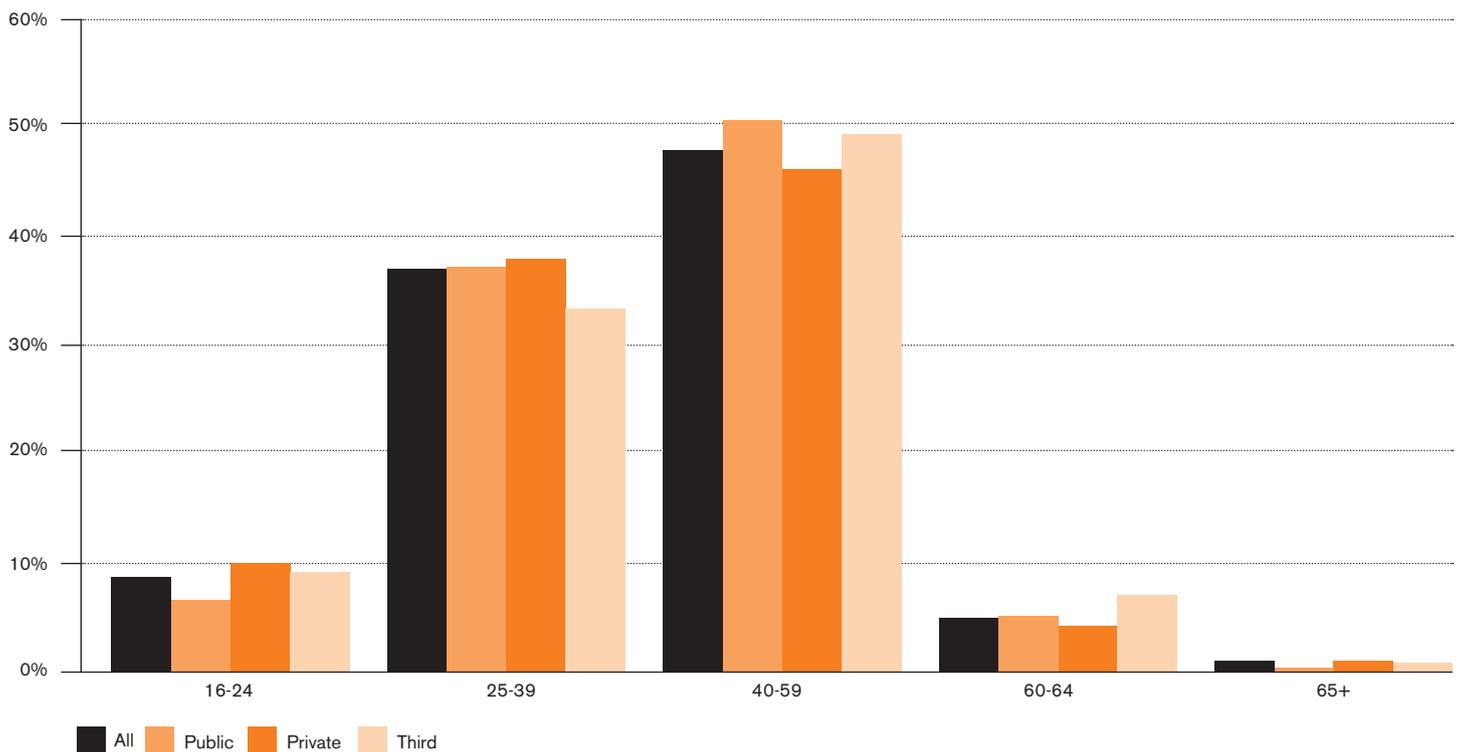


Figure 4: Age profile of employees in green space organisations by organisation type



Q: What proportion of your staff are full-time or part-time?

Between 80 and 90 per cent of the sector's employees are employed on a full-time basis (Table 9), with the third sector employing the largest proportion of part-timers. The green space sector employs a significantly higher proportion of its workforce on a full-time basis than the England average.

Table 9: Full/part-time employment

Type of employment	England*	Public sector	Private sector	Third sector
Full time	73.8%	87.3%	88.7%	79.5%
Part time	26.2%	12.7%	11.3%	20.5%

* Source: ONS Q3, 2009

Q: What proportion of your staff are permanent or non-permanent?

Some 90 per cent of staff are on permanent contracts. The third sector employs the largest proportion of staff on non-permanent fixed contracts. The public sector has the highest percentage of temporary/agency staff, and the private sector has the largest proportion of casual labour.

Table 10: Employment status of employees in green space organisations

Employment status	All green space organisations	Public sector	Private sector	Third sector
Permanent	92.0%	91.8%	92.6%	90.9%
Non-permanent: fixed contract	4.9%	4.6%	4.8%	5.9%
Non-permanent: agency temping	1.3%	2.6%	0.4%	1.3%
Non-permanent: casual labour	1.8%	1.0%	2.2%	1.9%

Q: What proportion of your staff work at each of the following levels: elementary, skilled trades, technical, managerial?

The highest proportion of managerial and technical employees is found in the private sector. The public and third sectors tend to employ slightly higher proportions of their staff at the skilled trade and elementary grades.

Table 11: Employment by grade

Grade	England*	All green space organisations	Public sector	Private sector	Third sector
Managerial	29.3%	28.8%	24.3%	31.7%	27.6%
Technical	14.9%	29.7%	28.6%	31.3%	26.1%
Skilled trades	17.3%	31.3%	34.7%	28.7%	34.2%
Elementary	10.9%	10.1%	12.4%	8.4%	12.1%

* Source: ONS *Employment by occupation*, Q3, 2009. The percentages do not add up to 100 because three occupational categories have been excluded: personal service occupations, administrative and secretarial, and sales and customer services (a total of 34 per cent of the workforce).

Figure 5: Employment grade by green space organisation type



Q: On average, how many volunteers do you have helping per year, and approximately how many total volunteer work days are donated per year?

Just under one third of the organisations responding to the survey (371) say they use volunteer staff. In total, they have more than 39,000 volunteers: that is more than one volunteer for every paid employee. These volunteers are reported to perform 164,000 work days a year (equivalent to 683 full-time staff).

The value of volunteers to the respondent organisations can be calculated using the national minimum wage: based on a 35-hour week, this results in an average annual salary of £10,429. This represents a total value of £7.1m per year to the organisations. For the sector as

a whole this rate of volunteering represents a contribution of between £22m and £28m a year.

Each public sector organisation responding to the survey used an average of 106 volunteers, providing just over 758 working days per year (equivalent to around three full-time staff). The equivalent figures for third sector organisations are 63 volunteers and 648 working days each year. By comparison, the private sector organisations used, on average, fewer than nine volunteers each year, contributing 53 working days.

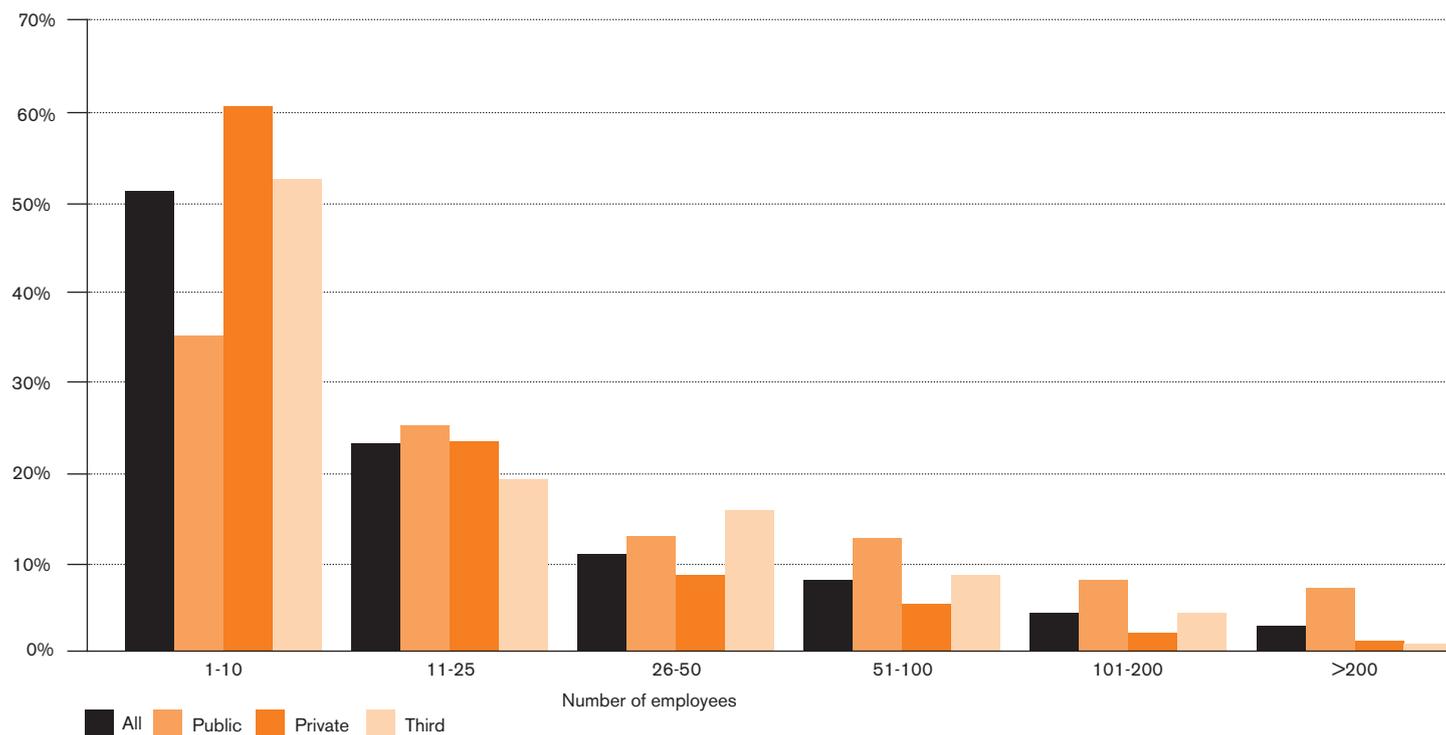
2.3.2 Organisational characteristics

Less than 60 per cent of the organisations surveyed had 10 or fewer employees, and around three quarters employed fewer than 26 staff (Figure 6 and Table 12).

Table 12: Green space organisation size by type

Number of employees	All green space organisations	Public sector	Private sector	Third sector
1-10	51.1%	35.0%	60.3%	52.5%
11-25	23.3%	25.2%	23.3%	19.3%
26-50	11.1%	13.0%	8.6%	15.5%
51-100	7.8%	12.2%	4.9%	8.3%
101-200	4.1%	7.7%	1.9%	3.9%
>200	2.8%	6.9%	1.0%	0.6%

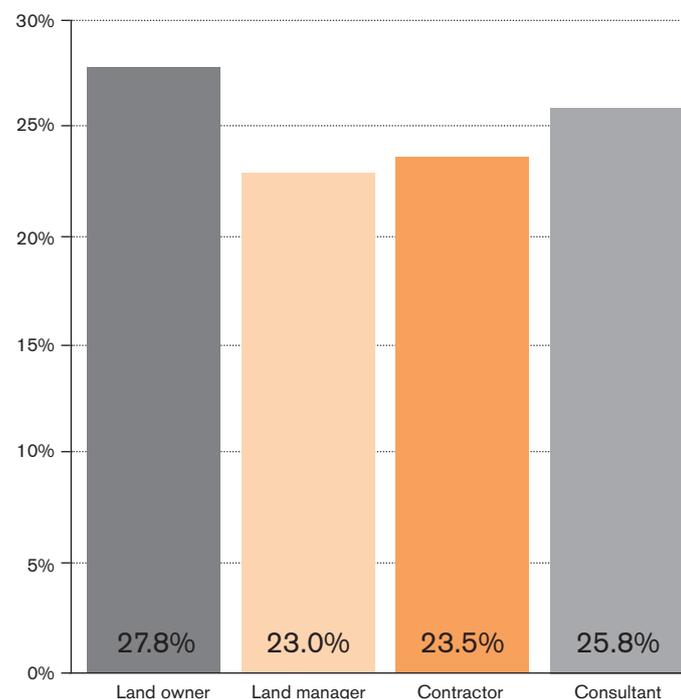
Figure 6: Green space organisation size by type



Q: Which of the following statements best describes the function of your organisation in relation to green spaces: land owner, contractor, land manager, consultant?

Approximately one quarter of the respondents fall into each of the four main categories of organisation function (Figure 7).

Figure 7: Percentage of green space organisations by function



Land owners and managers fall predominantly into the public and third sectors, while the private sector accounts for the majority of contractors and consultants (Table 13).

Table 13: Function by green space organisation type

Sector	Land owner	Land manager	Contractor	Consultant
Public sector	62.1%	69.8%	10.7%	12.0%
Private sector	8.0%	10.0%	85.5%	83.1%
Third sector	30.0%	20.3%	3.8%	4.9%

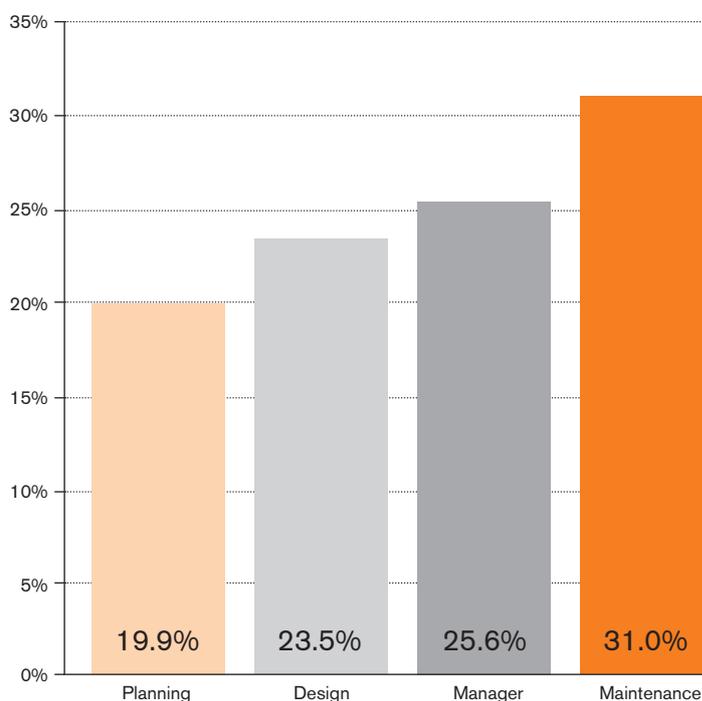
Q: Which of the following statements best describes your organisation's role in relation to green spaces: planning, management, design, maintenance?

The distinction between organisation types is not as clearly defined with respect to roles as it is for functions (Table 14).

Table 14: Role by green space organisation type

Sector	Planning	Design	Management	Maintenance
Public sector	36.9%	29.9%	49.6%	34.4%
Private sector	49.2%	56.8%	27.4%	49.0%
Third sector	13.9%	13.3%	23.0%	16.6%

Figure 8: Percentage of green space organisations by role



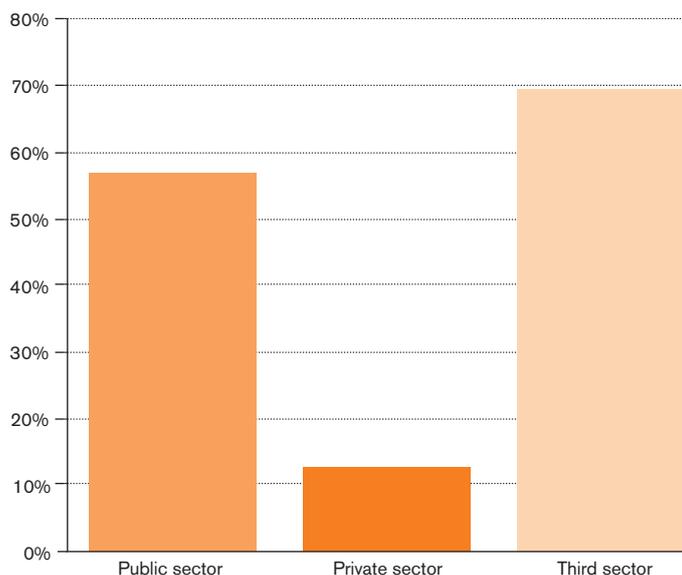
Q. As a land owner do you contract out green space maintenance work?

Just over half of land owners contract out some of their green space maintenance, (55.5 per cent), with a higher rate of outsourcing in the public and third sectors: the third sector contracts out almost 70 per cent of its work. A list of companies that survey respondents said work was contracted out to is included in Appendix 3.

Table 15: Percentage of land owners contracting out green space work

	All green space organisations	Public sector	Private sector	Third sector
Work contracted out	55.5%	56.8%	12.8%	69.8%
Work not contracted out	44.5%	43.2%	87.2%	30.2%

Figure 9: Percentage of land owners contracting out green space work



Q: In which types of green spaces does your organisation work?

Figure 10 shows that work is undertaken across the whole range of green spaces. However, the third sector tends to undertake a larger proportion of work in parks, amenity and natural green spaces (see Table 16).

Respondents also reported working in a range of green spaces not included in the list provided, many of which are private or semi-private spaces. These are listed in Appendix 4.

Figure 10: Types of green spaces where organisations work is undertaken

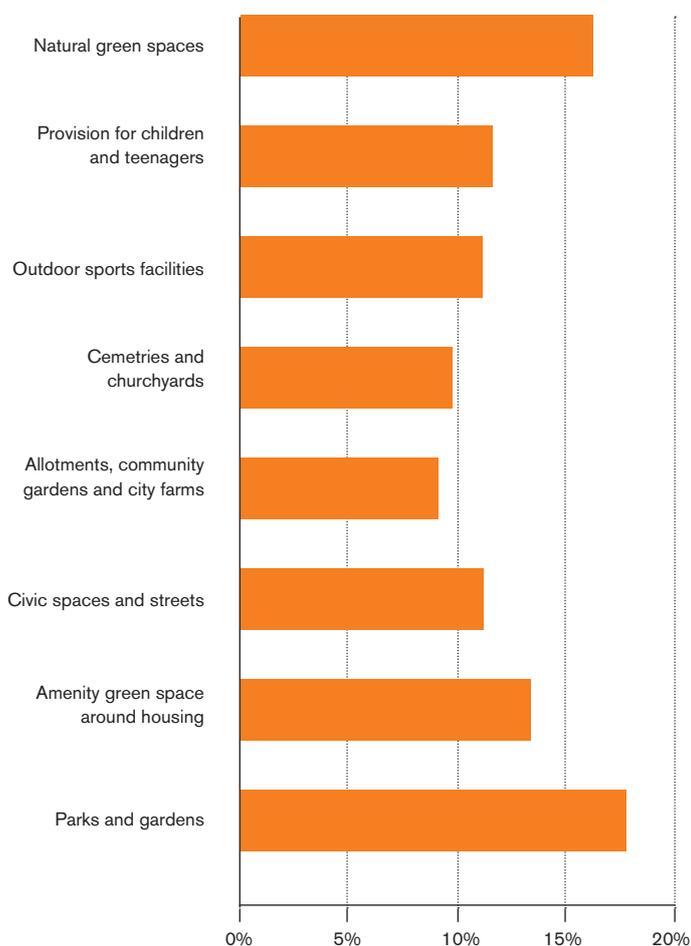


Table 16: Types of green spaces where organisations work by organisation type

Type of green space	All	Public sector	Private sector	Third sector
Parks and gardens	17.8%	17.6%	17.2%	21.7%
Amenity green space around housing	13.3%	9.7%	14.7%	18.0%
Civic spaces and streets	11.2%	10.4%	12.6%	6.2%
Allotments, community gardens and city farms	9.1%	10.4%	7.7%	11.8%
Cemeteries and churchyards	9.7%	12.5%	8.9%	4.3%
Outdoor sports facilities	11.1%	11.8%	11.9%	4.7%
Provision for children and teenagers	11.6%	11.3%	11.7%	12.4%
Natural green spaces	16.2%	16.3%	15.3%	20.8%
Total	100%	100%	100%	100%

Q: What proportion of your total annual work is to do with publicly accessible green spaces?

Around three quarters of the work undertaken by land owners and managers responding to the survey is directly related to green spaces. Just under half of the work of consultants concerns such spaces, while contractors are engaged in work on green spaces for 38 per cent of the time.

Table 17: Percentage of work conducted in publicly accessible green spaces

Land owner	75.6%
Land manager	77.2%
Contractor	38.4%
Consultant	49.7%

3. Skills and training challenges

3.1 Training in the sector

Q: How much money is spent by your organisation on training each year?

A total of 522 organisations provided information relating to training expenditure. Each spent an average of £5,671 per year on training.

The average spend in the public sector was just over £15,400 per organisation; for the private sector just over £3,000; and for the third sector £6,000.

Taking into account margins of error, average training spend varied from £3,100-£4,700 for private sector organisations to £8,400-£13,500 per year for public sector organisations and £2,800-£6,500 for third sector organisations.

Organisations in the green space sector spend, on average, about £690 per employee on training each year.

The equivalent spend per person in the various business types is: public sector £244.87, private sector £831.24, third sector £432.34.

Q: Over the past 12 months, what methods have you used to arrange training for your staff: on-the-job training and coaching, on-the-job exchange programmes, off-the-job training courses, off-the-job conferences or seminars?

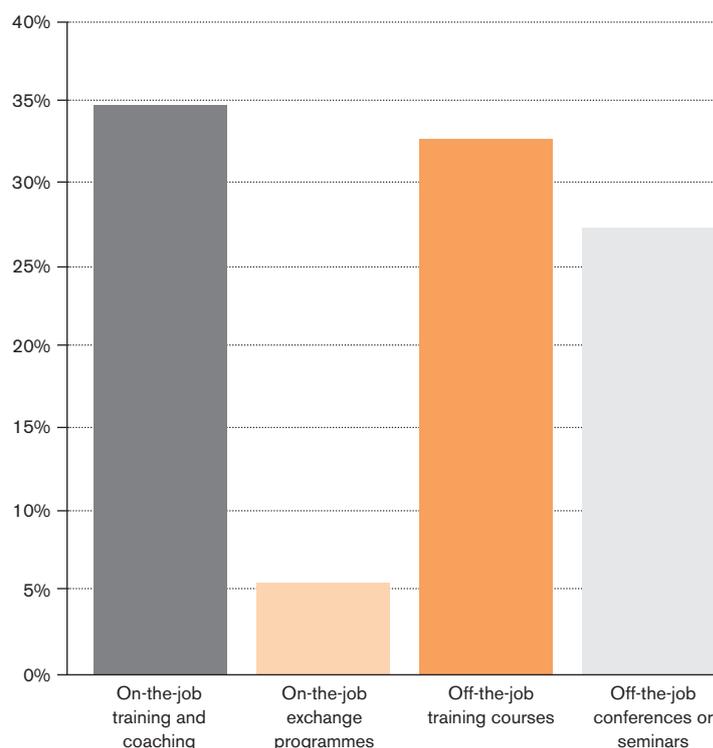
All organisation types use on-the-job training for around one third of their training requirements. The public sector uses this method least (one third of its training) while the third sector uses this approach for around 40 per cent of its training.

Off-the-job training courses account for another third of training, and between a fifth and a quarter of training is conducted through seminars and conferences (Table 18).

Table 18: Training methods used in the last 12 months by green space organisation type

Training method	All	Public sector	Private sector	Third sector
On-the-job training and coaching	34.7%	33.2%	34.7%	39.0%
On-the-job exchange programmes	5.2%	6.2%	4.3%	6.1%
Off-the-job training courses	32.8%	32.1%	33.2%	32.8%
Off-the-job conferences or seminars	27.3%	28.5%	27.8%	22.1%
Total	100%	100%	100%	100%

Figure 11: Training methods used in the last 12 months by green space organisation type



Q: What barriers, if any, prevent you from providing more training?

The two most common factors preventing training from taking place were the same in all types of organisation: cost and time. These factors accounted for a similar proportion of responses for the public sector (65 per cent) and third sector (64 per cent), and slightly less in the private sector (54 per cent).

Figure 12: Barriers to training identified by green space organisations

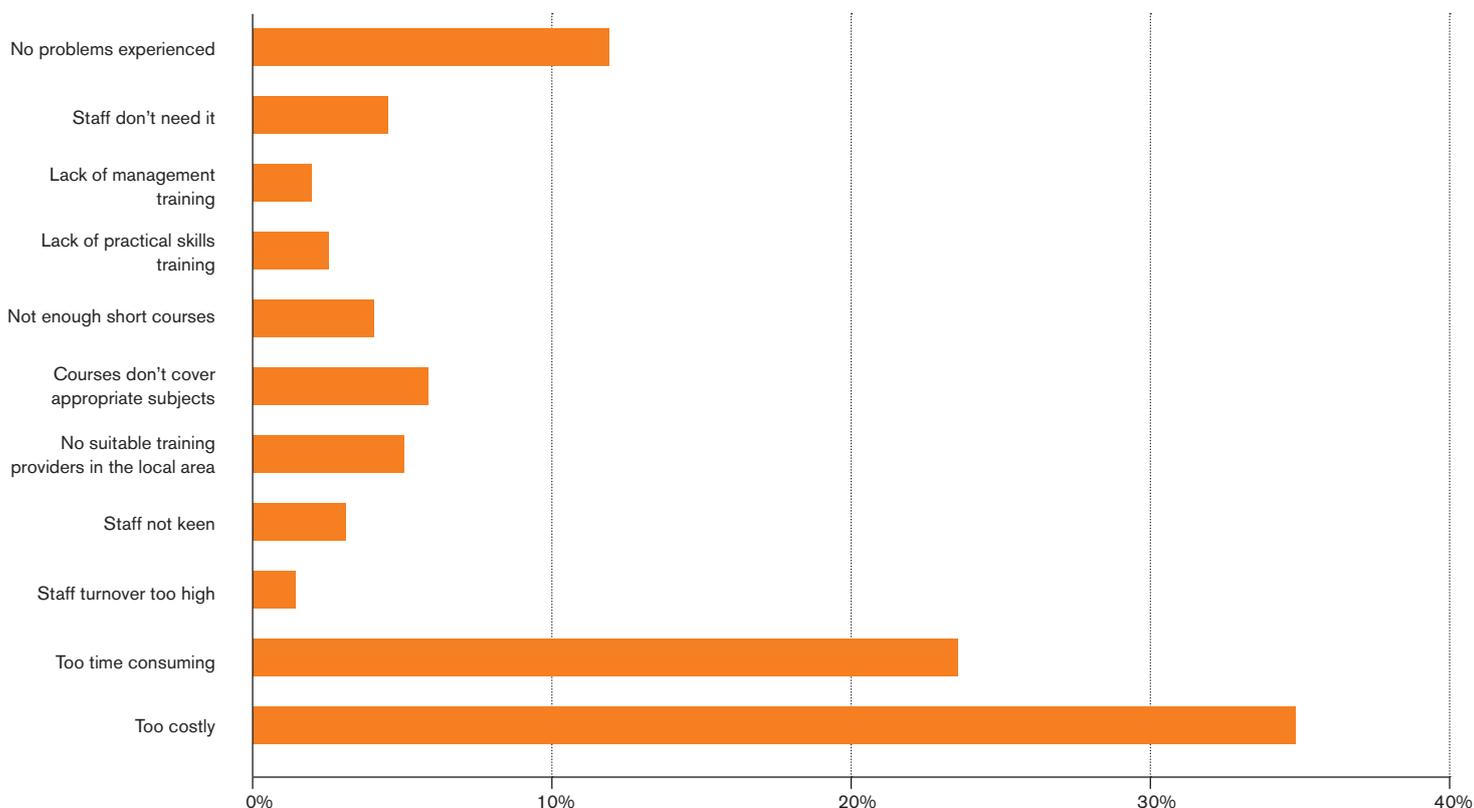


Table 19: Barriers to training identified by green space organisations

Barriers to training	All	Public sector	Private sector	Third sector
Too costly	35.1%	42.8%	30.1%	39.1%
Too time consuming	23.8%	22.6%	24.2%	25.1%
Staff turnover too high	1.5%	1.1%	1.7%	1.4%
Staff not keen	3.2%	3.9%	2.9%	2.9%
No suitable training providers in the local area	5.2%	4.3%	6.4%	1.9%
Courses don't cover appropriate subjects	6.0%	4.9%	6.7%	5.8%
Not enough short courses	4.2%	4.7%	4.5%	1.4%
Lack of practical skills training	2.6%	1.3%	3.5%	1.4%
Lack of management training	2.0%	2.1%	2.1%	1.4%
Staff don't need it	4.5%	2.1%	6.5%	1.4%
No problems experienced	11.9%	10.3%	11.5%	17.9%
Total	100%	100%	100%	100%

Q: Does your organisation currently offer work experience placements or internships related to green spaces?

Almost 57 per cent of all respondent organisations offer work experience. This varies from almost 70 per cent in the public sector to just under 50 per cent in the private sector.

Table 20: Percentage of green space organisations offering work experience

Response	All	Public sector	Private sector	Third sector
Yes	56.6%	69.9%	49.0%	56.1%
No	42.5%	29.2%	50.0%	43.9%

Q: Does your organisation currently run apprenticeship schemes for green space workers? If so, how many apprentices do you currently employ?

Table 21: Percentage of green space organisations running apprenticeship schemes

Response	All	Public sector	Private sector	Third sector
Yes	19.2%	25.8%	14.8%	20.9%
No	80.8%	74.2%	85.2%	79.1%

Of the 159 respondents that said they run apprenticeship schemes, the responses show an average of around three apprentices per organisation. This varies by type of organisation with the highest average in the public sector, at around four apprentices per organisation.

Table 22: Average number of apprentices per organisation which offer apprenticeships

	All	Public sector	Private sector	Third sector
Average number of apprentices	3.1	4.1	2.6	1.7
Organisations reporting	159	69	69	21
Margin of error	2.4-3.8	3.0-5.2	1.4-3.8	1.1-2.4

3.2 Qualifications

Almost 5 per cent of employees in the sector hold no qualifications at all, and between one third and a half hold qualifications at level 4 and above.

Q: Roughly what proportion of your green space staff are qualified to the following levels: level 4 and above (degree equivalent), level 3 (A-level equivalent), level 2 (GCSE A-C equivalent), level 1 (GCSE D-G equivalent), no qualifications held?

Table 23: Qualifications held by employees by organisation type

Organisation level	England*	All green space sector	Public sector	Private sector	Third sector
Level 4 (degree equivalent and above)	33.5%	44.2%	37.7%	49.4%	35.9%
Level 3 (A-level equivalent)	20.2%	21.0%	26.4%	15.5%	34.2%
Level 2 (GCSE A-C equivalent)	21.0%	24.3%	24.4%	24.5%	23.0%
Level 1 (GCSE D-G equivalent)	17.7%	5.8%	7.0%	5.5%	4.2%
No qualifications held	7.6%	4.7%	4.5%	5.2%	2.7%
Total	100%	100%	100%	100%	100%

* Source: Labour force survey, Q3 - 2009

Table 24: Qualifications held by employees by green space organisation role

Qualification level	Land owner	Land manager	Contractor	Consultant
Level 4 (degree equivalent and above)	32.6%	36.9%	15.4%	75.6%
Level 3 (A level equivalent)	28.6%	27.2%	21.2%	11.6%
Level 2 (GCSE A-C equivalent)	26.3%	24.9%	44.8%	9.4%
Level 1 (GCSE D-G equivalent)	7.2%	7.5%	11.6%	1.3%
No qualifications held	5.3%	3.5%	7.0%	2.1%
Total	100%	100%	100%	100%

Q: Are you aware of the new diploma in environmental and land-based studies that was made available for teaching within schools from September 2009?

The diploma is part of a new range of qualifications aimed at young people aged between 14 and 19. Just over a quarter of respondents were aware of it. The level of awareness is highest in the public sector at 42.8 per cent. About 80 per cent of private and third sector organisations are not aware of this new diploma.

Table 25: Awareness of the new diploma in environmental an land-based studies

Response	All green space sector	Public sector	Private sector	Third sector
Yes	26.5%	42.8%	18.6%	20.3%
No	73.5%	57.2%	81.4%	79.7%

3.3 Skills shortages

A skills shortage exists when employers are unable to find recruits with the appropriate qualifications and/or skills and knowledge to fill vacant positions.

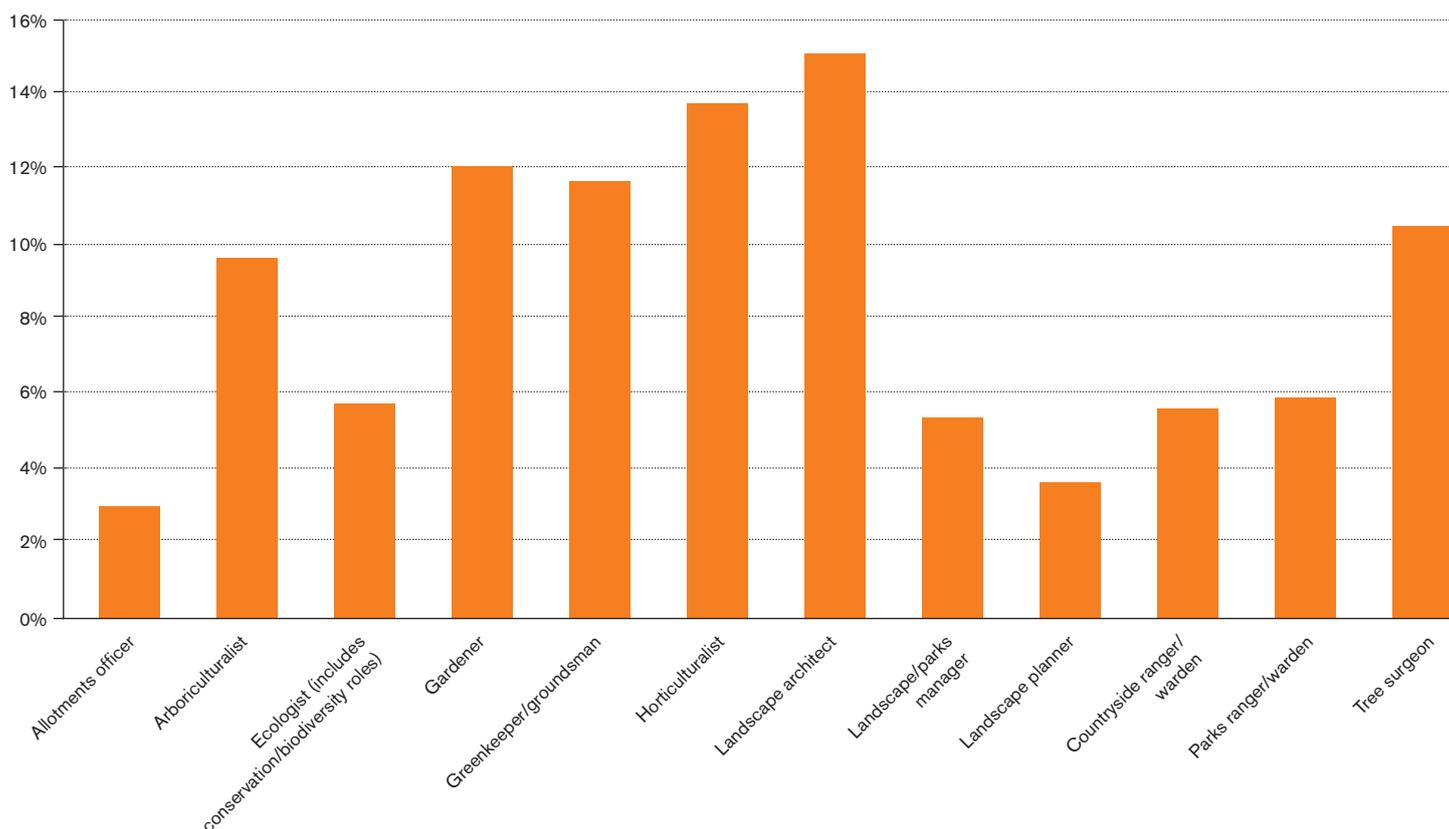
Q: What green space roles does your organisation need that you find hard to recruit because of a shortage of skills?

Table 26 highlights the job roles which are the most difficult to recruit due to a shortage of skills in each business type. Respondents also reported a number of additional hard-to-recruit roles, including general management roles such as supervisor and green space manager. Appendix 3 contains a list of all the job roles reported as being hard to recruit.

Table 26: Job roles hard to recruit due to skills shortages

Job role	All	Public sector	Private sector	Third sector
Landscape architect	14.9%	8.5%	22.5%	8.2%
Horticulturalist	13.7%	16.4%	9.9%	18.0%
Gardener	12.0%	10.3%	11.5%	18.0%
Greenkeeper/groundsman	11.5%	11.5%	11.0%	13.1%
Tree surgeon	10.3%	8.5%	12.0%	9.8%
Arboriculturalist	9.4%	9.7%	8.4%	11.5%
Parks ranger/warden	5.8%	10.3%	3.1%	1.6%
Ecologist (includes conservation/biodiversity roles)	5.5%	4.2%	6.8%	4.9%
Countryside ranger/warden	5.5%	9.1%	3.1%	3.3%
Landscape/parks manager	5.3%	6.1%	4.7%	4.9%
Landscape planner	3.4%	3.6%	3.7%	1.6%
Allotments officer	2.9%	1.8%	3.1%	4.9%

Figure 13: Job roles hard to recruit due to skills shortages



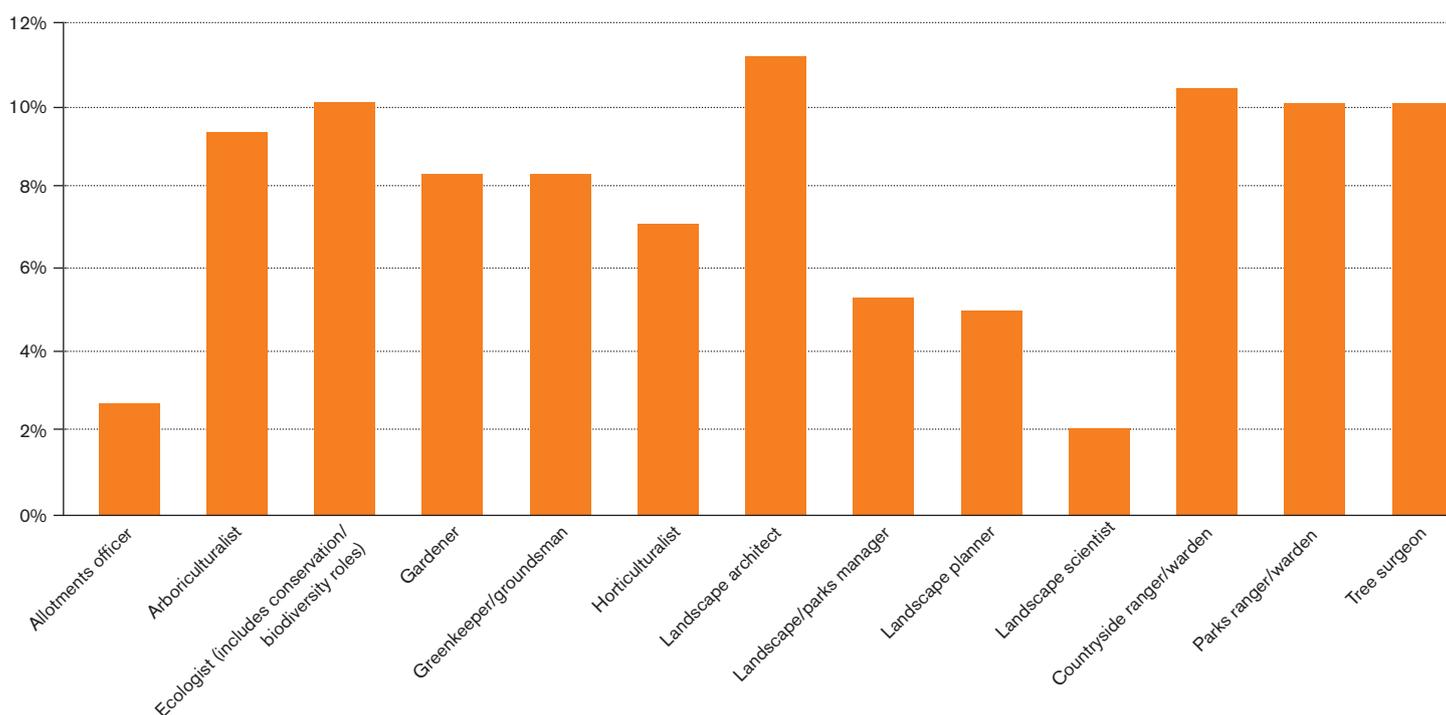
Q: What green space roles does your organisation really need, but cannot afford to recruit?

The job roles which employers really need but cannot afford to recruit for each business type are highlighted in Table 27. Respondents also reported a wide range of other green space job roles they needed but could not afford to recruit, which are listed in Appendix 3.

Table 27: Job roles cannot afford to recruit

Job role	All	Public sector	Private sector	Third sector
Landscape architect	11.2	10.0	13.5	10.9
Countryside ranger/warden	10.3	15.0	4.8	6.3
Ecologist (includes conservation/biodiversity roles)	10.1	9.4	13.5	6.3
Parks ranger/warden	10.1	14.4	2.9	9.4
Tree surgeon	10.1	6.1	18.3	7.8
Arboriculturalist	9.2	10.0	8.7	7.8
Gardener	8.3	5.0	9.6	15.6
Greenkeeper/groundsman	8.3	6.1	10.6	10.9
Horticulturalist	7.2	6.7	7.7	7.8
Landscape/parks manager	5.5	5.6	4.8	6.3
Landscape planner	4.9	5.6	3.8	4.7
Allotments officer	2.9	2.8	1.9	4.7
Landscape scientist	2.0	3.3	0	1.6

Figure 14: Job roles cannot afford to recruit



Q: Do you buy in skills externally?

If so, which skills do you buy in?

Buying in skills may also be an indication of skills shortages in organisations. For some however, it is a preferred business model. Table 28 shows the percentage of organisations buying in key skills.

Table 28: Skills bought in by organisation type

Skill	All green space sector	Public sector	Private sector	Third sector
Tree climbing techniques	40.1	54.4	22.7	61.2
Operating complex machinery	23.7	32.0	9.7	48.1
Maintaining woodlands	23.5	30.1	11.8	44.3
Propagating plants	22.4	30.3	7.3	46.6
Maintaining the health and condition of turf	20.6	26.3	6.3	46.0
Sustaining plant development	20.2	25.9	5.7	45.9
Understanding plant growth cycles	18.3	21.5	6.4	43.7
Understanding plant health	18.3	21.8	6.6	43.3
Managing pests and diseases	17.9	24.1	5.8	40.2
Planning plant beds	17.8	19.8	6.2	43.3
Basic maintenance of grassed areas	16.6	23.1	4.3	37.0
Keeping sites clear of waste	16.0	23.4	4.9	32.1
Basic maintenance of planted areas	15.9	23.0	3.6	35.8
Handling plant material properly	15.8	22.9	3.6	36.9
Using tools and equipment properly	14.9	20.7	3.7	34.9
IT professional skills	12.6	9.3	14.3	12.9
Creating designs which are fit for purpose	8.7	12.3	6.1	11.4
Customer handling and dealing with the public	7.5	12.2	3.7	9.9
Team-working	7.3	10.5	3.8	11.0
Planning for sustainability and climate change	7.1	6.1	6.5	11.8
Oral communication	7.0	10.4	3.3	11.1
Identifying risks to health, safety and security	6.9	5.0	7.6	8.1
Understanding/managing historic gardens/landscapes	6.6	7.1	6.2	6.8
Managing projects	6.3	7.5	5.1	8.8
Planning strategies and policies	6.2	6.6	5.1	9.7
Maintaining the condition of sites after creation	6.2	6.0	5.6	9.5
Design/managing for sustainability and climate change	6.1	6.2	5.8	7.6
Co-ordinating data collection	5.4	4.6	5.0	9.5
Marketing and promoting sites	5.3	5.4	4.8	7.1
Complying with legal and regulatory requirements	5.3	4.1	4.9	9.5
Engaging with the public about green space matters	5.1	5.4	4.9	5.0
Networking	5.0	4.1	5.1	7.0
Managing budgets and fundraising activities	3.9	3.3	3.4	7.5
Written communications	3.9	4.2	4.4	1.2
Leading and managing people	3.4	2.4	3.1	6.8
Involving volunteers	3.2	3.0	3.0	4.2
Working in partnership with other organisations	3.2	2.1	3.2	5.9
Problem solving	2.9	3.8	2.8	1.2

Respondents noted a number of skills bought in that were in addition to those skills in the survey, which are listed in Appendix 3.

3.4 Skills gaps

Skills gaps exist where employers perceive there are skills missing from the existing workforce.

To understand skill gaps in the green space sector, respondents to the survey were asked to score 39 sector-specific skills in two ways: firstly to reflect how well skilled their current workforce is (on a scale of one to 10); and secondly, how important each of the skills will be to their organisation in the future (less important scored 1, the same importance scored 2, more important scored 3).

The results are shown on the following graphs, which can be divided into four quadrants by the average score for all skills. Each dot represents a skill. A horizontal line has been added for the average current skills score and a vertical line for the average future importance. The diagonal line (the 'regression line') shows the best fit for the clustering and direction of the data.

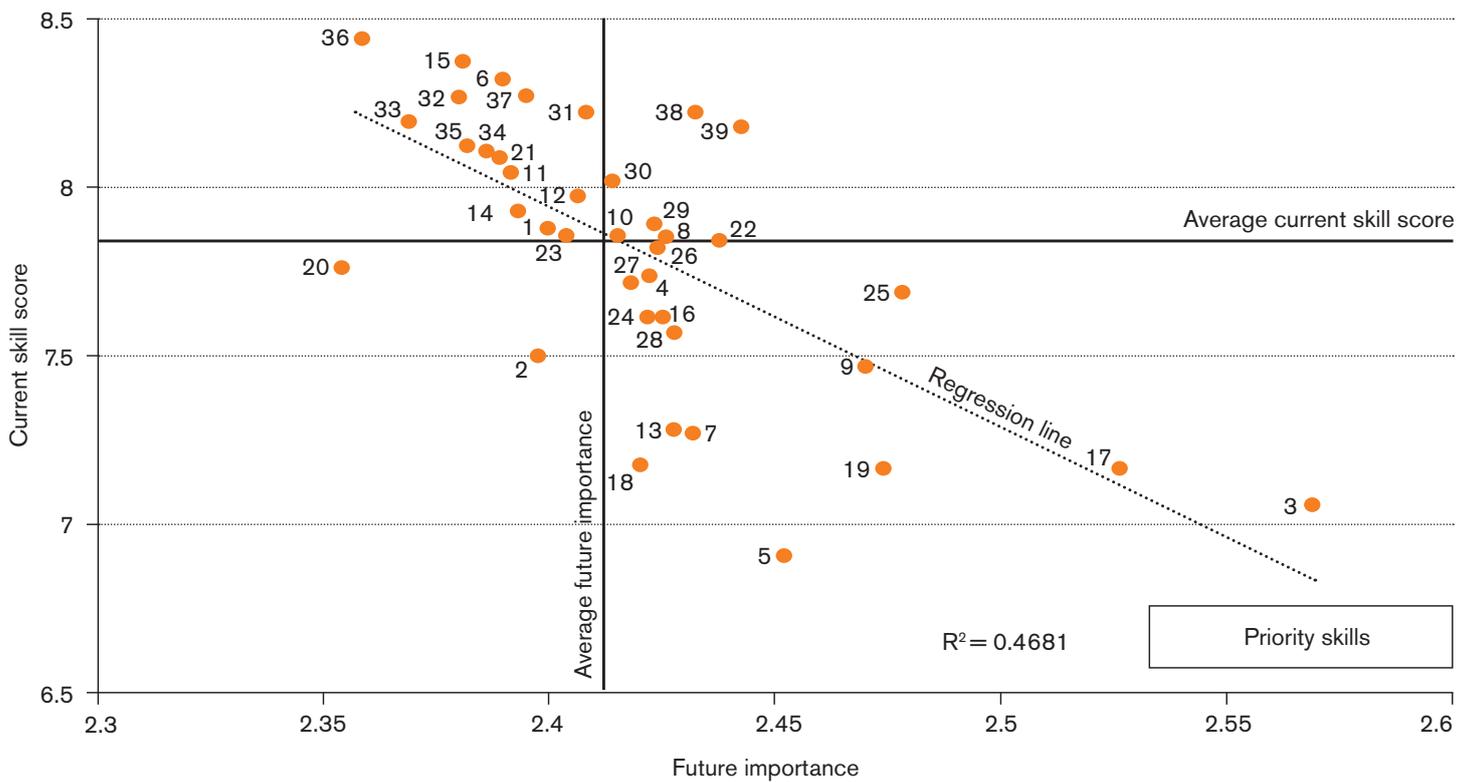
The top left quadrant contains skills that have been judged by sector organisations to be above average in terms of current skills levels, but below average in importance for the future. The lower right quadrant contains skills of above average importance for the future but with below average current skill levels. The skills in this quadrant are referred to as 'priority skills'. For further details on the skills scoring methodology see Appendix 1.

Key to the skills scoring graphs

- 1 Planning the improvement of sites
- 2 Planning strategies and policies
- 3 Planning for sustainability and climate change
- 4 Managing budgets and fundraising activities
- 5 Marketing and promoting sites
- 6 Complying with legal and regulatory requirements
- 7 Involving volunteers
- 8 Working in partnership with other organisations
- 9 Engaging with the public about green space matters
- 10 Leading and managing people
- 11 Managing projects
- 12 Creating designs which are fit for purpose
- 13 Co-ordinating data collection
- 14 Maintaining the condition of sites after creation
- 15 Identifying risks to health, safety and security
- 16 Understanding and managing historic gardens and landscapes
- 17 Design/managing for sustainability and climate change
- 18 Networking
- 19 IT professional skills
- 20 Written communications
- 21 Problem solving
- 22 Maintaining the health and condition of turf
- 23 Planning plant beds
- 24 Propagating plants
- 25 Sustaining plant development
- 26 Understanding plant growth cycles
- 27 Understanding plant health
- 28 Managing pests and diseases
- 29 Maintaining woodlands
- 30 Tree climbing techniques
- 31 Operating complex machinery
- 32 Keeping sites clear of waste
- 33 Basic maintenance of grassed areas
- 34 Basic maintenance of planted areas
- 35 Handling plant material properly
- 36 Using tools and equipment properly
- 37 Customer handling and dealing with the public
- 38 Team working
- 39 Oral communication

The top four sector-wide priority skills (see Table 29) appear in the priority skill lists for each of the three organisation types (public, private and third), but there are slight differences between them in terms of other priorities.

Figure 15: Skills scoring - green space sector

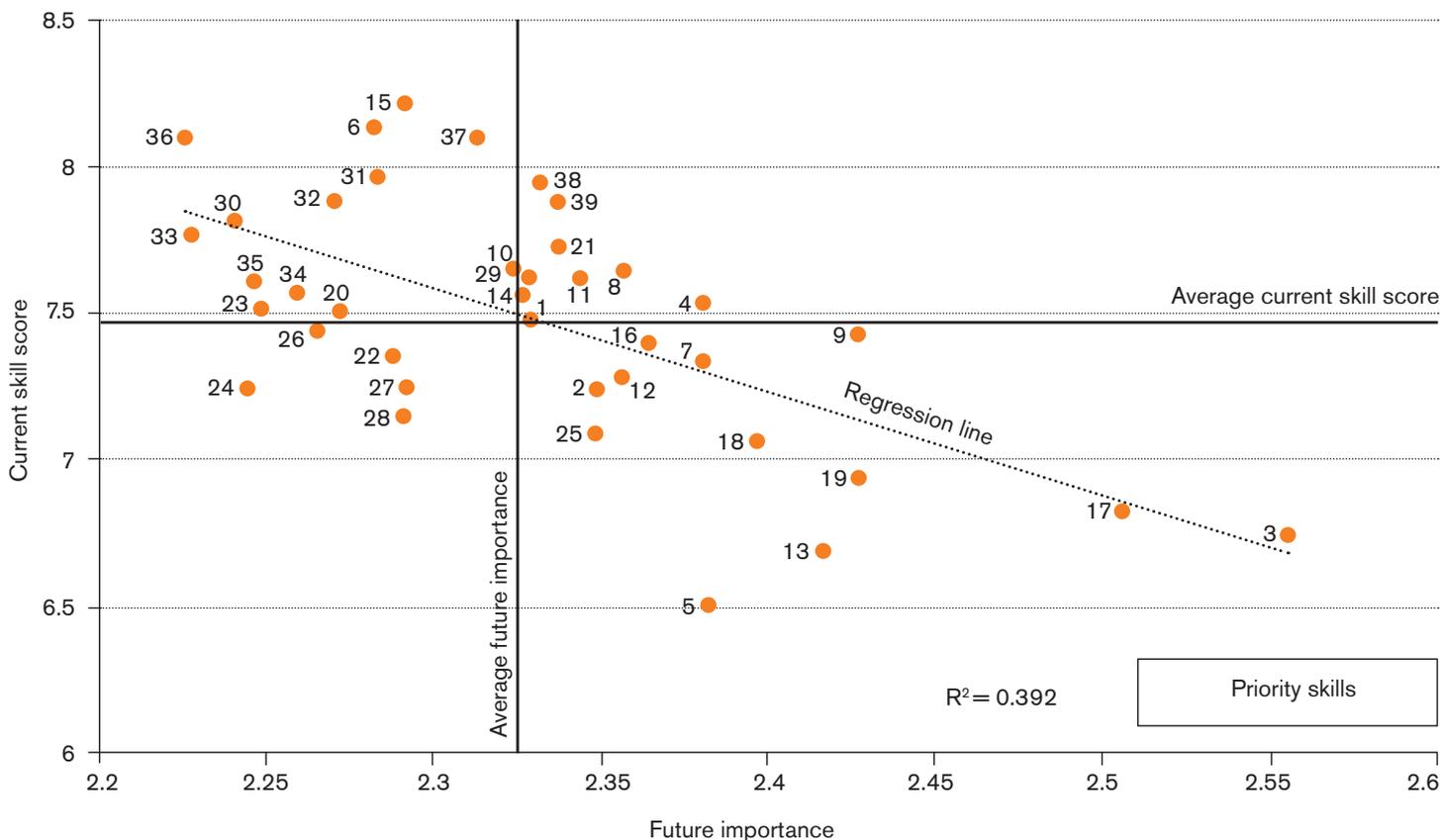


- | | | |
|--|---|--|
| 1 Planning the improvement of sites | 14 Maintaining the condition of sites after creation | 26 Understanding plant growth cycles |
| 2 Planning strategies and policies | 15 Identifying risks to health, safety and security | 27 Understanding plant health |
| 3 Planning for sustainability and climate change | 16 Understanding and managing historic gardens and landscapes | 28 Managing pests and diseases |
| 4 Managing budgets and fundraising activities | 17 Design/managing for sustainability and climate change | 29 Maintaining woodlands |
| 5 Marketing and promoting sites | 18 Networking | 30 Tree climbing techniques |
| 6 Complying with legal and regulatory requirements | 19 IT professional skills | 31 Operating complex machinery |
| 7 Involving volunteers | 20 Written communications | 32 Keeping sites clear of waste |
| 8 Working in partnership with other organisations | 21 Problem solving | 33 Basic maintenance of grassed areas |
| 9 Engaging with the public about green space matters | 22 Maintaining the health and condition of turf | 34 Basic maintenance of planted areas |
| 10 Leading and managing people | 23 Planning plant beds | 35 Handling plant material properly |
| 11 Managing projects | 24 Propagating plants | 36 Using tools and equipment properly |
| 12 Creating designs which are fit for purpose | 25 Sustaining plant development | 37 Customer handling and dealing with the public |
| 13 Co-ordinating data collection | | 38 Team-working |
| | | 39 Oral communication |

Table 29: Priority skills: green space sector

Priority skill	Skill reference number	Future importance score	Current skills score
Marketing and promoting sites	5	2.45	6.91
Planning for sustainability and climate change	3	2.57	7.06
Design/managing for sustainability and climate change	17	2.53	7.17
IT professional skills	19	2.47	7.17
Networking	18	2.42	7.18
Involving volunteers	7	2.43	7.27
Co-ordinating data collection	13	2.43	7.28
Engaging with the public about green space matters	9	2.47	7.47
Managing pests and diseases	28	2.43	7.57
Understanding and managing historic gardens and landscapes	16	2.42	7.61
Propagating plants	24	2.42	7.61
Sustaining plant development	25	2.48	7.69
Understanding plant health	27	2.42	7.71
Managing budgets and fundraising activities	4	2.42	7.74

Figure 16: Public sector skills scores

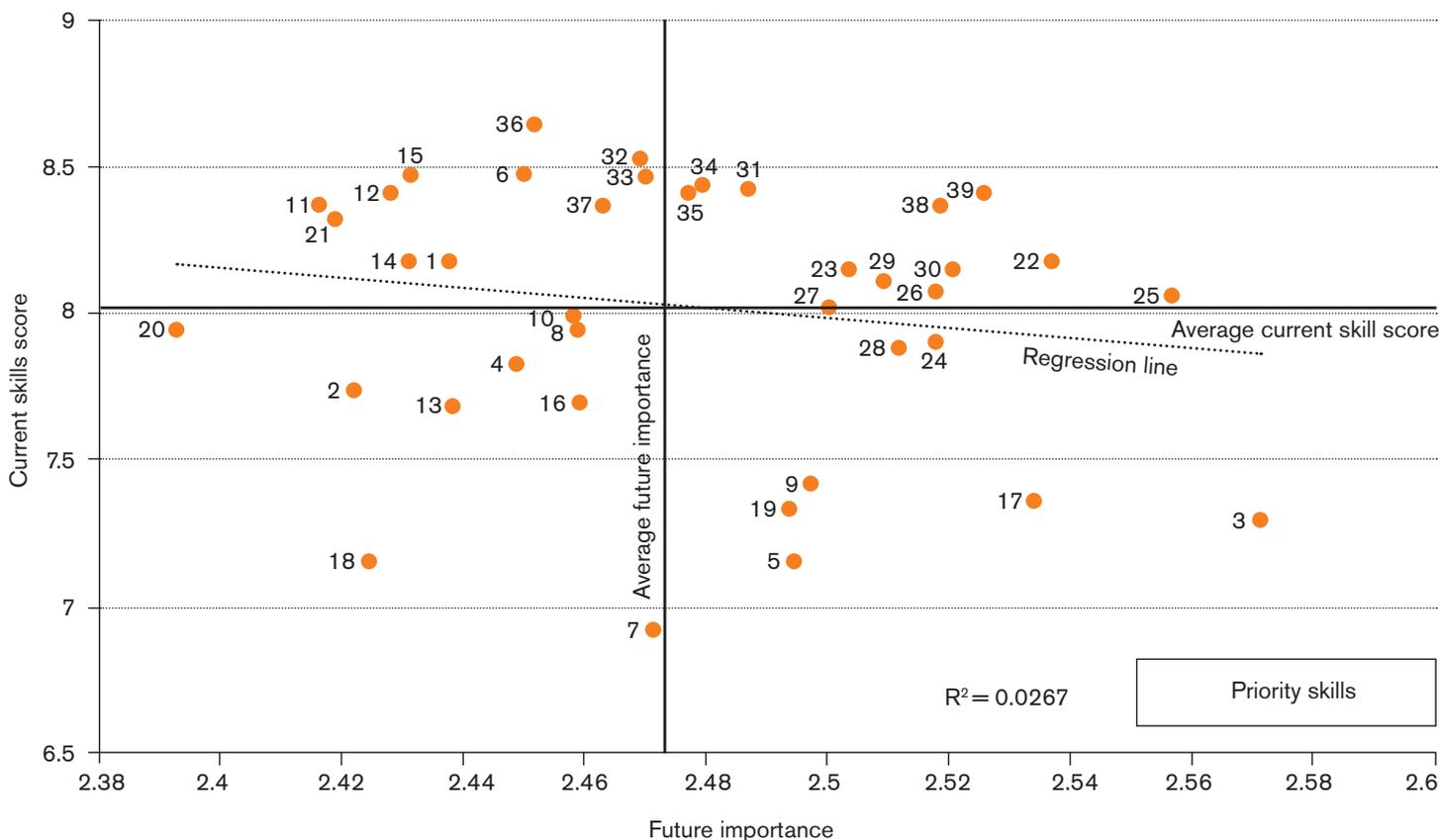


- | | | |
|--|---|--|
| 1 Planning the improvement of sites | 14 Maintaining the condition of sites after creation | 26 Understanding plant growth cycles |
| 2 Planning strategies and policies | 15 Identifying risks to health, safety and security | 27 Understanding plant health |
| 3 Planning for sustainability and climate change | 16 Understanding and managing historic gardens and landscapes | 28 Managing pests and diseases |
| 4 Managing budgets and fundraising activities | 17 Design/managing for sustainability and climate change | 29 Maintaining woodlands |
| 5 Marketing and promoting sites | 18 Networking | 30 Tree climbing techniques |
| 6 Complying with legal and regulatory requirements | 19 IT professional skills | 31 Operating complex machinery |
| 7 Involving volunteers | 20 Written communications | 32 Keeping sites clear of waste |
| 8 Working in partnership with other organisations | 21 Problem solving | 33 Basic maintenance of grassed areas |
| 9 Engaging with the public about green space matters | 22 Maintaining the health and condition of turf | 34 Basic maintenance of planted areas |
| 10 Leading and managing people | 23 Planning plant beds | 35 Handling plant material properly |
| 11 Managing projects | 24 Propagating plants | 36 Using tools and equipment properly |
| 12 Creating designs which are fit for purpose | 25 Sustaining plant development | 37 Customer handling and dealing with the public |
| 13 Co-ordinating data collection | | 38 Team-working |
| | | 39 Oral communication |

Table 30: Priority skills: public sector green space

		Future importance	Current skills score
5	Marketing and promoting sites	2.38	6.51
13	Co-ordinating data collection	2.42	6.69
3	Planning for sustainability and climate change	2.56	6.74
17	Design/managing for sustainability and climate change	2.51	6.83
19	IT professional skills	2.43	6.94
18	Networking	2.40	7.07
25	Sustaining plant development	2.35	7.09
2	Planning strategies and policies	2.35	7.25
12	Creating designs which are fit for purpose	2.36	7.29
7	Involving volunteers	2.38	7.35
16	Understanding and managing historic gardens and landscapes	2.36	7.40
9	Engaging with the public about green space matters	2.43	7.44

Figure 17: Private sector skills scores

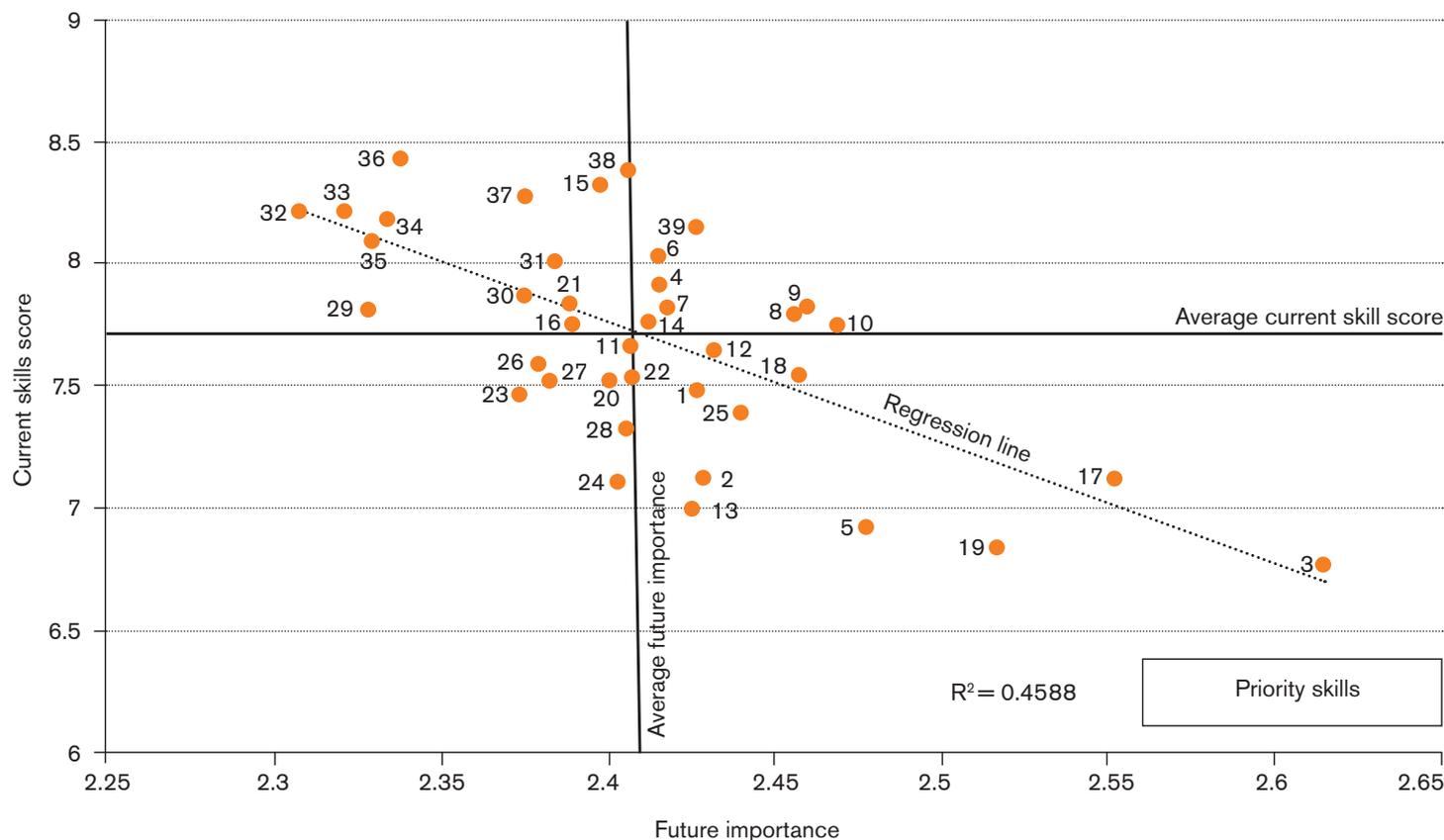


- | | | |
|--|---|--|
| 1 Planning the improvement of sites | 14 Maintaining the condition of sites after creation | 26 Understanding plant growth cycles |
| 2 Planning strategies and policies | 15 Identifying risks to health, safety and security | 27 Understanding plant health |
| 3 Planning for sustainability and climate change | 16 Understanding and managing historic gardens and landscapes | 28 Managing pests and diseases |
| 4 Managing budgets and fundraising activities | 17 Design/managing for sustainability and climate change | 29 Maintaining woodlands |
| 5 Marketing and promoting sites | 18 Networking | 30 Tree climbing techniques |
| 6 Complying with legal and regulatory requirements | 19 IT professional skills | 31 Operating complex machinery |
| 7 Involving volunteers | 20 Written communications | 32 Keeping sites clear of waste |
| 8 Working in partnership with other organisations | 21 Problem solving | 33 Basic maintenance of grassed areas |
| 9 Engaging with the public about green space matters | 22 Maintaining the health and condition of turf | 34 Basic maintenance of planted areas |
| 10 Leading and managing people | 23 Planning plant beds | 35 Handling plant material properly |
| 11 Managing projects | 24 Propagating plants | 36 Using tools and equipment properly |
| 12 Creating designs which are fit for purpose | 25 Sustaining plant development | 37 Customer handling and dealing with the public |
| 13 Co-ordinating data collection | | 38 Team-working |
| | | 39 Oral communication |

Table 31: Priority skills: private sector green space

		Future importance	Current skills score
7	Involving volunteers	2.47	6.93
5	Marketing and promoting sites	2.49	7.16
3	Planning for sustainability and climate change	2.57	7.30
19	IT professional skills	2.49	7.35
17	Design/managing for sustainability and climate change	2.53	7.37
9	Engaging with the public about green space matters	2.49	7.42
28	Managing pests and diseases	2.51	7.89
24	Propagating plants	2.52	7.92

Figure 18: Third sector skills scores



- | | | |
|--|---|--|
| 1 Planning the improvement of sites | 14 Maintaining the condition of sites after creation | 26 Understanding plant growth cycles |
| 2 Planning strategies and policies | 15 Identifying risks to health, safety and security | 27 Understanding plant health |
| 3 Planning for sustainability and climate change | 16 Understanding and managing historic gardens and landscapes | 28 Managing pests and diseases |
| 4 Managing budgets and fundraising activities | 17 Design/managing for sustainability and climate change | 29 Maintaining woodlands |
| 5 Marketing and promoting sites | 18 Networking | 30 Tree climbing techniques |
| 6 Complying with legal and regulatory requirements | 19 IT professional skills | 31 Operating complex machinery |
| 7 Involving volunteers | 20 Written communications | 32 Keeping sites clear of waste |
| 8 Working in partnership with other organisations | 21 Problem solving | 33 Basic maintenance of grassed areas |
| 9 Engaging with the public about green space matters | 22 Maintaining the health and condition of turf | 34 Basic maintenance of planted areas |
| 10 Leading and managing people | 23 Planning plant beds | 35 Handling plant material properly |
| 11 Managing projects | 24 Propagating plants | 36 Using tools and equipment properly |
| 12 Creating designs which are fit for purpose | 25 Sustaining plant development | 37 Customer handling and dealing with the public |
| 13 Co-ordinating data collection | | 38 Team-working |
| | | 39 Oral communication |

Table 32: Priority skills: third sector green space

		Future importance	Current skills score
3	Planning for sustainability and climate change	2.61	6.78
19	IT professional skills	2.52	6.85
5	Marketing and promoting sites	2.48	6.92
13	Co-ordinating data collection	2.42	7.00
17	Design/managing for sustainability and climate change	2.55	7.13
2	Planning strategies and policies	2.43	7.13
25	Sustaining plant development	2.44	7.39
1	Planning the improvement of sites	2.43	7.48
18	Networking	2.46	7.55
12	Creating designs which are fit for purpose	2.43	7.65

3.5 Urban/non-urban local authorities and registered social landlords

The following tables and charts present the findings from respondents classified as urban local authorities (urban LAs) and non-urban local authorities (non-urban LAs) as defined by the Department for Environment, Food and Rural Affairs, as well as those from registered social landlords (RSLs).

Of the 338 public sector responses, 69 (20 per cent) can be defined as 'urban local authorities', which represents 41 per cent of the 168 English urban authorities. 251 of the public sector responses were from non-urban authorities. Of the 159 third sector responses, 61 (38 per cent) were registered social landlords, which represents 1.2 per cent of the 5,125 housing associations in England, as stated by the Office for National Statistics.

The data extracted from these two groups cover questions relating to training, qualifications, skills shortages and skills gaps.

Q: Roughly what proportion of your green space staff are qualified to the following levels: level 4 and above (degree equivalent), level 3 (A-level equivalent), level 2 (GCSE A-C equivalent), level 1 (GCSE D-G equivalent), no qualifications held?

Table 33 illustrates the differences in qualification profiles of the urban LA respondents and RSLs compared to the green space workforce as a whole.

Table 33: Qualifications held by employees in green space organisations(urban/non-urban LAs and RSLs)

Qualification level	All green space organisations	Urban LAs	Non-urban LAs	RSLs
Level 4 + (degree equivalent)	44.2%	35.2%	36.5%	24.2%
Level 3 (A-level equivalent)	21.0%	24.8%	27.7%	41.2%
Level 2 (GCSE A-C equivalent)	24.3%	21.2%	25.0%	34.7%
Level 1 (GCSE D-G equivalent)	5.8%	9.8%	6.9%	0.0%
No qualifications held	4.7%	9.1%	3.8%	0.0%
Total	100%	100%	100%	100%

Q: Does your organisation currently offer work experience placements or internships related to green spaces?

Work experience placements are offered by four fifths of the urban LAs and two thirds of non-urban LAs who responded to the survey. About one third of RSLs offer them.

Table 34: Percentage of green space organisations offering work experience (urban LAs/non-urban LAs and RSLs)

Response	All green space organisations	Urban LAs	Non-urban LAs	RSLs
Yes	56.6%	81.2%	66.0%	30.0%
No	42.5%	18.8%	33.0%	70.0%

Q: Does your organisation currently run apprenticeship schemes for green space workers?

The proportion of urban local authorities offering apprenticeship schemes is slightly higher than the public sector average of 25.8 per cent, while the proportion of non-urban LAs offering such schemes is slightly lower than the average. The proportion of RSLs offering apprenticeship schemes is slightly lower than the third sector average of 20.9 per cent.

Table 35: Percentage of green space organisations offering apprenticeships (urban LAs/non-urban LAs and RSLs)

Response	All green space organisations	Urban LAs	Non-urban LAs	RSLs
Yes	19.1%	33.8%	21.8%	13.3%
No	80.9%	66.2%	78.2%	86.7%

Q: Are you aware of the new diploma in environmental and land-based studies that was made available for teaching within schools from September 2009?

Both urban and non-urban local authorities appear to have above-average awareness of the new diploma being offered to 14-19 year olds. None of the respondents from the 61 RSLs surveyed were aware of the diploma.

Table 36: Awareness of diploma in environmental and land-based studies (urban and non-urban LAs)

Response	All green space organisations	Urban LAs	Non-urban LAs
Yes	26.5%	44.9%	41.6%
No	73.5%	55.1%	58.4%

Q: Over the past 12 months, what methods have you used to arrange training for your staff: on-the-job training and coaching, on-the-job exchange programmes, off-the-job training courses, off-the-job conferences or seminars?

Methods of training delivery among urban LAs and RSLs are similar to the findings for the wider public and third sectors. Urban LAs use a mix of approaches, while RSLs are using fewer short off-the-job conferences and seminar programmes.

Table 37: Training methods used in the last 12 months (urban LAs/non-urban LAs and RSLs)

Training method	All green space organisations	Urban LAs	Non-urban LAs	RSLs
On-the-job training and coaching	34.8%	32.1%	33.8%	42.9%
On-the-job exchange programmes	5.2%	7.7%	6.7%	0.0%
Off-the-job training courses	32.8%	30.1%	32.4%	38.8%
Off-the-job conferences or seminars	27.2%	30.1%	27.1%	18.4%

Q: What green space roles does your organisation need that you find hard to recruit because of a shortage of skills?

The results for this question share a similar pattern to the wider public and third sectors (Table 27). Difficulties recruiting greenkeepers, horticulturalists and landscape architects are reported to be more prevalent in urban local authorities. A higher proportion

of non-urban local authorities report difficulties recruiting arboriculturalists, tree surgeons and rangers. A significant proportion of RSLs (25 per cent) report difficulties recruiting tree surgeons, compared to less than 10 per cent for the third sector as a whole.

Table 38: Hard to recruit job roles (urban LAs/non-urban LAs and RSLs)

Job role	All green space organisations	Urban LAs	Non-urban LAs	RSLs
Landscape architect	14.9%	13.6%	7.1%	5.0%
Horticulturalist	13.9%	18.2%	15.1%	20.0%
Gardener	12.0%	9.1%	10.3%	15.0%
Greenkeeper/groundsman	11.5%	15.9%	8.7%	10.0%
Tree surgeon	10.2%	4.5%	9.5%	25.0%
Arboriculturalist	9.5%	6.8%	11.1%	10.0%
Ecologist (includes conservation/biodiversity roles)	5.6%	4.5%	4.8%	5.0%
Parks ranger/warden	5.6%	6.8%	11.1%	0.0%
Countryside ranger/warden	5.4%	6.8%	9.5%	0.0%
Landscape/parks manager	5.1%	4.5%	7.1%	5.0%
Landscape planner	3.4%	6.8%	3.2%	0.0%
Allotments officer	2.9%	2.3%	2.4%	5.0%

Q: What green space roles does your organisation really need, but cannot afford to recruit?

Table 39 highlights skills that employers have difficulty in recruiting due to affordability.

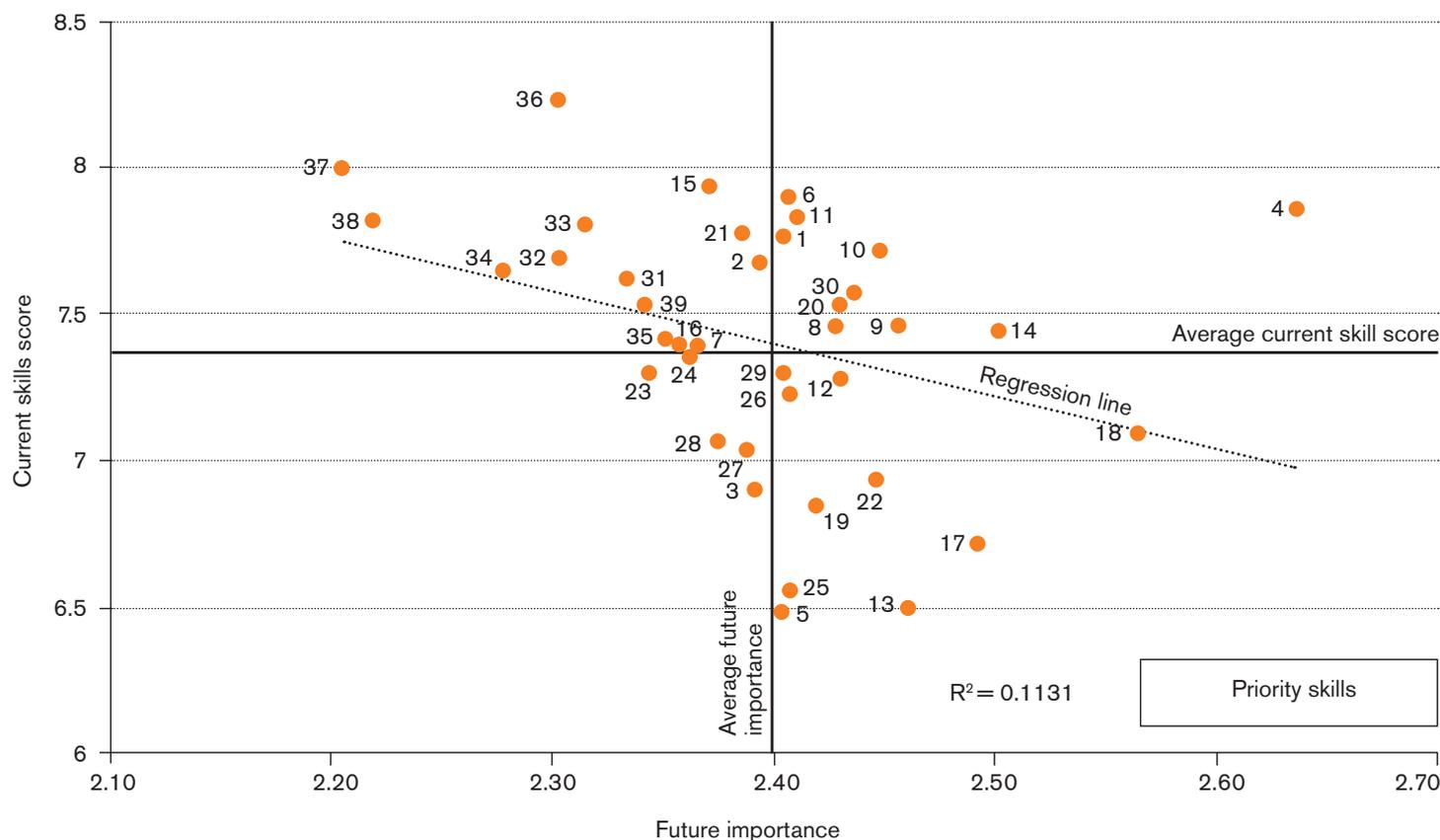
Again, the results show a similar pattern to the wider public and third sectors.

Table 39: Job roles cannot afford to recruit (urban LAs/non-urban LAs and RSLs)

Job role	All green space organisations	Urban LAs	Non-urban LAs	RSLs
Landscape architect	11.2	15.0	8.8	6.7
Ecologist (includes conservation/biodiversity roles)	10.4	10.0	9.5	6.7
Countryside ranger/warden	10.4	12.5	16.1	-
Parks ranger/warden	10.1	12.5	16.1	-
Tree surgeon	10.1	5.0	6.6	13.3
Arboriculturalist	9.5	10.0	10.9	13.3
Gardener	8.3	2.5	4.4	26.7
Greenkeeper/groundsman	8.3	2.5	6.6	13.3
Horticulturalist	7.1	7.5	6.6	6.7
Landscape/parks manager	5.3	7.5	4.4	6.7
Landscape planner	5.0	7.5	5.1	-
Allotments officer	2.7	5.0	2.2	6.7
Landscape scientist	1.8	2.5	2.9	-

The remainder of this section presents the skills score data for urban LAs and RSLs. Respondents were asked to score 39 priority sector skills in two ways: firstly to reflect how well-skilled their current workforce is (on a scale of one to 10); and secondly, how important each of the skills will be to their organisation in the future (less important scored 1, the same importance scored 2, more important scored 3).

Figure 19: Skills scores (urban LAs)

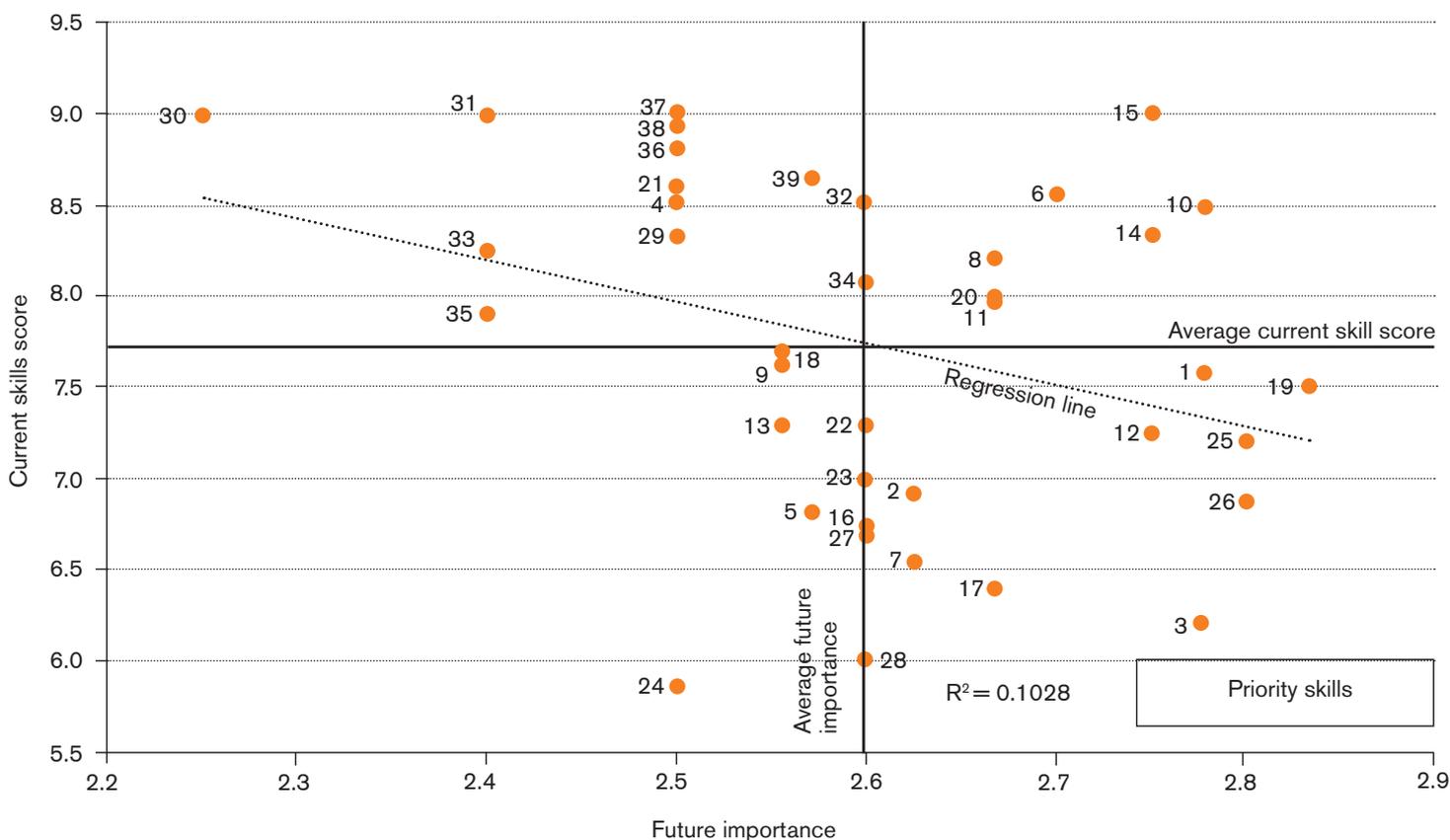


- | | | |
|--|---|--|
| 1 Planning the improvement of sites | 14 Maintaining the condition of sites after creation | 26 Understanding plant growth cycles |
| 2 Planning strategies and policies | 15 Identifying risks to health, safety and security | 27 Understanding plant health |
| 3 Planning for sustainability and climate change | 16 Understanding and managing historic gardens and landscapes | 28 Managing pests and diseases |
| 4 Managing budgets and fundraising activities | 17 Design/managing for sustainability and climate change | 29 Maintaining woodlands |
| 5 Marketing and promoting sites | 18 Networking | 30 Tree climbing techniques |
| 6 Complying with legal and regulatory requirements | 19 IT professional skills | 31 Operating complex machinery |
| 7 Involving volunteers | 20 Written communications | 32 Keeping sites clear of waste |
| 8 Working in partnership with other organisations | 21 Problem solving | 33 Basic maintenance of grassed areas |
| 9 Engaging with the public about green space matters | 22 Maintaining the health and condition of turf | 34 Basic maintenance of planted areas |
| 10 Leading and managing people | 23 Planning plant beds | 35 Handling plant material properly |
| 11 Managing projects | 24 Propagating plants | 36 Using tools and equipment properly |
| 12 Creating designs which are fit for purpose | 25 Sustaining plant development | 37 Customer handling and dealing with the public |
| 13 Co-ordinating data collection | | 38 Team-working |
| | | 39 Oral communication |

Table 40: Priority skills (urban LAs)

Priority skills	Future importance	Current skills score
5 Marketing and promoting sites	2.40	6.48
13 Co-ordinating data collection	2.46	6.50
25 Sustaining plant development	2.41	6.55
17 Design/managing for sustainability and climate change	2.49	6.73
19 IT professional skills	2.42	6.84
22 Maintaining the health and condition of turf	2.45	6.93
18 Networking	2.56	7.10
26 Understanding plant growth cycles	2.41	7.24
12 Creating designs which are fit for purpose	2.43	7.28
29 Maintaining woodlands	2.41	7.29

Figure 20: Skills scores (RSLs)



- | | | |
|--|---|--|
| 1 Planning the improvement of sites | 14 Maintaining the condition of sites after creation | 26 Understanding plant growth cycles |
| 2 Planning strategies and policies | 15 Identifying risks to health, safety and security | 27 Understanding plant health |
| 3 Planning for sustainability and climate change | 16 Understanding and managing historic gardens and landscapes | 28 Managing pests and diseases |
| 4 Managing budgets and fundraising activities | 17 Design/managing for sustainability and climate change | 29 Maintaining woodlands |
| 5 Marketing and promoting sites | 18 Networking | 30 Tree climbing techniques |
| 6 Complying with legal and regulatory requirements | 19 IT professional skills | 31 Operating complex machinery |
| 7 Involving volunteers | 20 Written communications | 32 Keeping sites clear of waste |
| 8 Working in partnership with other organisations | 21 Problem solving | 33 Basic maintenance of grassed areas |
| 9 Engaging with the public about green space matters | 22 Maintaining the health and condition of turf | 34 Basic maintenance of planted areas |
| 10 Leading and managing people | 23 Planning plant beds | 35 Handling plant material properly |
| 11 Managing projects | 24 Propagating plants | 36 Using tools and equipment properly |
| 12 Creating designs which are fit for purpose | 25 Sustaining plant development | 37 Customer handling and dealing with the public |
| 13 Co-ordinating data collection | | 38 Team-working |
| | | 39 Oral communication |

Table 41: Priority skills (RSLs)

Priority skills	Future importance	Current skills score
28 Managing pests and diseases	2.6	6.0
3 Planning for sustainability and climate change	2.8	6.2
17 Design/managing for sustainability and climate change	2.7	6.4
7 Involving volunteers	2.6	6.5
27 Understanding plant health	2.6	6.7
26 Understanding plant growth cycles	2.8	6.9
2 Planning strategies and policies	2.6	6.9
23 Planning plant beds	2.6	7.0
12 Creating designs which are fit for purpose	2.8	7.3
22 Maintaining the health and condition of turf	2.6	7.3
19 IT professional skills	2.8	7.5
1 Planning the improvement of sites	2.8	7.6

4. Sector comparisons

The green space sector overlaps the classifications of several other commercial and industrial sectors and makes use of skills similar to those used in other economic areas.

This research uses selected Q3 2009 data for England extracted from the UK-wide Office for National Statistics (ONS) *Labour force survey*. This labour market intelligence has been compared with two broad industry categories as classified within the standard industrial classification (SIC) 2007 system⁴. They are:

- agriculture, forestry and fishing
- arts, entertainment and recreation.

This helps to identify common issues in the wider land-based sector (not only related to public green spaces) and in the arts, entertainment and recreation sector (employers whose work may be indirectly related to green spaces).

In the following section, figures and percentages for the green space sector refer to the survey findings gathered for this publication.

4.1 Employment

The green space sector, as defined by this research, employs around 120,000 people. The agriculture, forestry and fishing industry is around 50 per cent larger (employing 221,427 people) while the arts, entertainment and recreation sector is more than four times as large (employing 664,513 people).

⁴ Labour force survey response totals are not identical across each of the tables and should be used to compare proportions only. The ONS states: 'Estimates are based on small sample sizes and are therefore subject to a margin of uncertainty. They should therefore be treated with caution.'

Table 42: Percentage in full/part-time employment: comparisons

Type of employment	Green space sector	Agriculture forestry and fishing	Arts entertainment and recreation
		<i>ONS Labour Force Survey (Q3 2009 data)</i>	<i>ONS Labour Force Survey (Q3 2009 data)</i>
Full time	86.9%	80.5%	60.3%
Part time	13.1%	19.5%	39.7%
Total	100%	100%	100%

Around 92 per cent of the green space sector is in permanent employment, which is slightly higher than the other sectors: agriculture, forestry and fishing is 90 per cent, and arts, entertainment and recreation is 87 per cent.

Table 43: Percentage in permanent/non-permanent employment: comparisons

Type of employment	Green space sector	Agriculture forestry and fishing	Arts entertainment and recreation
		<i>ONS Labour Force Survey (Q3 2009 data)</i>	<i>ONS Labour Force Survey (Q3 2009 data)</i>
Permanent	92.1%	90.0%	86.8%
Not permanent	7.9%	10.0%	13.2%
Total	100%	100%	100%

A larger proportion of the green space workforce is employed within the public sector (57 per cent) than is the case within arts, entertainment and recreation (24 per cent). No data was available from ONS with respect to the public/private sector split within agriculture, forestry and fishing.

Table 44: Percentage in private/public sector employment: comparisons

Sector	Green space sector	Arts entertainment and recreation
	<i>ONS Labour Force Survey (Q3 2009 data)</i>	
Private	42.9%	76.4%
Public	57.1%	23.6%
Total	100%	100%

NOTE: Sample sizes in Agriculture forestry and fishing are too small to provide reliable estimates. This table does not include third sector and proportions have been reweighted accordingly.

71 per cent of green space sector staff are male, which means that the sector attracts a slightly higher proportion of female workers than the wider agriculture, forestry and fishing industry (75 per cent male). The arts, entertainment and recreation sector workforce is 46 per cent female.

Table 45: Workforce gender balance: comparisons

Gender	Green space sector	Agriculture forestry and fishing	Arts entertainment and recreation
	<i>ONS Labour Force Survey (Q3 2009 data)</i>		<i>ONS Labour Force Survey (Q3 2009 data)</i>
Male	71.0%	75.8%	53.6%
Female	29.0%	24.2%	46.4%
Total	100%	100%	100%

Table 46 illustrates the workforce distribution across different age bands. The green space sector has a slightly younger age profile than either of the comparator sectors.

Around 6 per cent of the green space sector workforce is over the age of 60. This is lower than the wider agriculture, forestry and fishing industry, where 20 per cent of the workforce is aged over 60. It is also slightly lower than the arts, entertainment and recreation industry, where 10 per cent of staff are aged 60-plus.

Just under 10 per cent of the green space workforce is aged under 25. This compares with 12.6 per cent in the agriculture, forestry and fishing industry and 22 per cent in the arts, entertainment and recreation industry.

Table 46: Age bands of workforce: comparisons

Age band	Green space sector	Agriculture forestry and fishing	Arts entertainment and recreation
		<i>ONS Labour Force Survey (Q3 2009 data)</i>	<i>ONS Labour Force Survey (Q3 2009 data)</i>
16-24	8.9%	12.7%	22.3%
25-39	37.2%	22.5%	33.6%
40-59	47.9%	44.7%	34.0%
60-64	5.1%	9.4%	5.8%
65+	0.8%	10.7%	4.4%
Total	100%	100%	100%

In ethnic terms, the green space workforce (97 per cent white) is slightly more diverse than the agriculture, forestry and fishing industry (99 per cent white) and slightly less diverse than the arts, entertainment and recreation industry (94 per cent white).

Table 47: Ethnicity of workforce: comparisons

Ethnic group	Green space sector	Agriculture forestry and fishing	Arts entertainment and recreation
		<i>ONS Labour Force Survey (Q3 2009 data)</i>	<i>ONS Labour Force Survey (Q3 2009 data)</i>
White	96.8%	98.6%	94.2%
Mixed	1.0%	*	1.1%
Asian or Asian British	0.8%	1.4%	1.6%
Black or Black British	0.7%	*	1.7%
Chinese	0.1%	-	0.4%
Other	0.6%	*	1.0%
Total	100%	100%	100%

* Sample sizes are too small to provide reliable estimates

- No figures to report

4.2 Qualifications

The green space workforce is more highly qualified than either of the comparative sectors. Some 44 per cent of staff working within the green space sector are qualified to a minimum standard of level 4, compared with the agriculture, forestry and fishing industry (19 per cent) and the arts, entertainment and recreation industry (36.8 per cent).

The green space sector has a lower proportion of staff qualified below level 2. Green space employers report that 11 per cent of their workforce falls within this category, compared with over 30 per cent in the two other industries.

Table 48: Highest qualification level held by workforce: comparisons

Qualification level	Green space sector	Agriculture forestry and fishing	Arts entertainment and recreation
		<i>ONS Labour Force Survey (Q3 2009 data)</i>	<i>ONS Labour Force Survey (Q3 2009 data)</i>
Level 4 (degree and equivalent and above)	44.3%	18.3%	36.8%
Level 3 (A level equivalent)	21.0%	14.4%	17.6%
Trade apprenticeship		6.1%	3.7%
Level 2 (GCSE A-C equivalent)	24.3%	16.5%	20.7%
Below level 2	5.8%	14.4%	10.0%
Other qualifications		14.1%	5.3%
No qualifications	4.7%	16.3%	5.9%
Total	100%	100%	100%

Levels set by National Qualifications Framework.

4.3 Skills

Green space skills were compared with four Sector Skills Councils (SSCs) whose footprints overlap, to some extent, with the green space sector:

- Lantra
- Asset Skills
- Creative and Cultural Skills
- ConstructionSkills

The results of the Learning and Skills Council *National employer skills survey 2007* show an average training spend for comparable sectors of between £1,700 and £2,975 per person per year. These figures are pre-recession and include all in-house and mentoring training as well as direct spend on courses. The green space sector survey only asked about the amount spent on external training courses.

Table 49: Training spend by SSC sector

SSC	Training spend per employee (£)
	<i>Source: Learning and Skills Council National Employer Skills Survey 2007</i>
Lantra	2,975
ConstructionSkills	2,750
Asset Skills	2,500
Creative and Cultural Skills	1,700
Green space sector	690*

* Figure based on 522 respondents to this survey

The top 10 skill gaps by sector are shown in Table 50. It must be noted, however, that the way in which skills gaps are classified in the *National employer skills survey* is very broad and more generic than the system adopted in the green space sector survey, which uses specific skills informed by the relevant standards.

Although communication, literacy and team-working appear on the list of skill gaps in the green space sector, the highest priorities are at the managerial and technical levels for very specific skill sets, (see Table 51).

Table 50: Skills gaps by SSC sector

	Asset Skills	% Lantra		% Construction skills		% Creative and cultural skills	%
1	Technical and practical	50%	Technical and practical	52%	Technical and practical	61%	Technical and practical 40%
2	Customer handling	46%	Teamworking	33%	Problem solving	34%	Customer handling 33%
3	Oral communication	45%	Problem solving	26%	Oral communication	31%	Oral communication 33%
4	Teamworking	41%	Oral communication	23%	Teamworking	31%	Problem solving 32%
5	Problem solving	41%	Customer handling	21%	Customer handling	26%	Teamworking 31%
6	Written communication	39%	Management	17%	Management	26%	Management 28%
7	Management	38%	IT user skills	15%	Written communication	25%	Literacy 25%
8	Literacy	32%	Foreign lanaguage	13%	Office admin	19%	Office admin 21%
9	IT user skills	26%	Literacy	13%	IT user skills	17%	Written communication 20%
10	Office admin	23%	Written communication	13%	Literacy	15%	IT professional skills 14%

Source: Learning and Skills Council *National Employer Skills Survey 2007*

Table 51: Priority skills: green space sector

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

About 57 per cent of employers in the green space sector offer work experience. When compared with City & Guilds research into work placements offered by UK employers, the figure for the green space sector is below average.⁵

The City and Guilds research shows that 89 per cent of public sector organisations offer work placements – the highest percentage of all the industry sectors listed. This compares with 70 per cent for public sector green space employers (see Table 20).

Table 52: Organisations offering work experience: other industry comparisons

Sector organisations	% offering work experience
Government and public sector	89%
Telecommunications and IT	77%
Financial services	68%
Healthcare and education	68%
Manufacturing	68%
Construction	65%
Leisure	62%
Retail	60%
Green space sector	57%*
Professional services	55%
Publishing & media	38%

Source: *Mutually compatible – effective work placements* - City & Guilds policy research group, p7.

* Green space skills survey 2009

About 19 per cent of green space employers offer apprenticeship schemes. This is the same as the construction sector and higher than the other comparable sectors.

The only sectors with a higher proportion of employers offering apprenticeships are the building service trades (44 per cent), the automotive industry (33 per cent) and the engineering sector (20 per cent).

Table 53: Organisations offering apprenticeships by SSC sector

SSC	% offering apprenticeships
ConstructionSkills	19%
Green space sector	19%*
Lantra	9%
Asset Skills	8%
Creative and Cultural Skills	6%

Source: Learning and Skills Council *National Employer Skills Survey 2007* p126.

* Green space skills survey 2009

⁵ Note: definitions of work experience may vary. The City & Guilds definition of work placements includes: work experience organised through a secondary school; placements as part of tertiary courses; internal internships or secondments and voluntary roles.

5. Future challenges

The survey contained some questions relating to the future. Respondents were asked to list the factors that were likely to affect their business over the next two years; about the impact of the recession⁶; and about the seven priorities for the green space sector identified in the CABE led, *Skills to grow* strategy which aims to improve green space skills in England.

5.1 The next two years

Q: Which factors are likely to affect your business over the next two years?

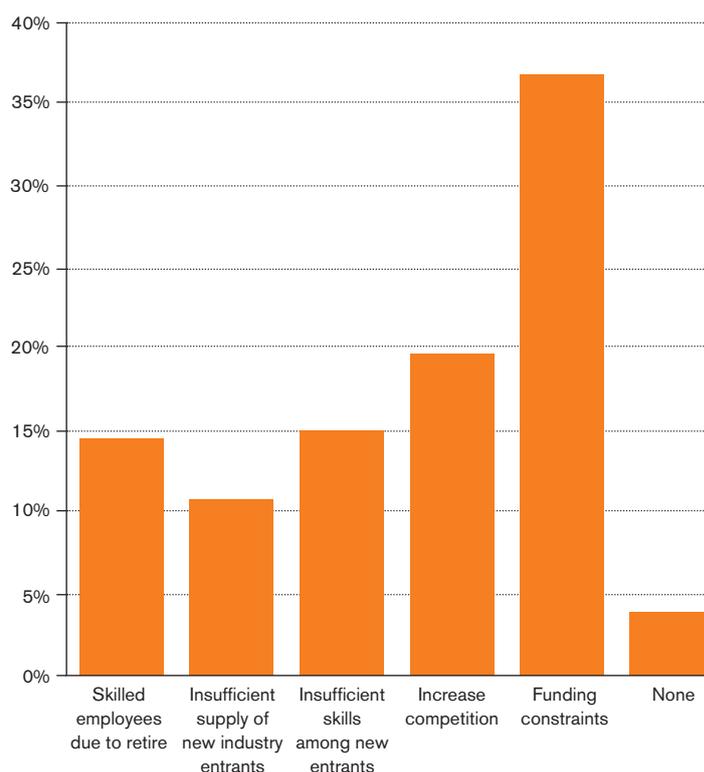
Table 54 lists the factors considered to be of greatest importance to the sector by organisation type over the next two years.

Funding constraints are identified by respondents from all three sectors as being of great importance over the next two years. Almost half of public sector (44.2 per cent) and third sector (46.4 per cent) respondents cite it as a major factor.

Table 54: Factors likely to affect business by organisation type

Factor	All green space organisations	Public sector	Private sector	Third sector
Skilled employees due to retire	14.3%	22.1%	9.0%	14.4%
Insufficient supply of new industry entrants	10.7%	10.9%	10.7%	10.1%
Insufficient skills among new entrants	15.0%	14.4%	16.0%	12.6%
Increasing competition	19.6%	7.8%	29.3%	12.6%
Funding constraints	36.6%	44.2%	28.9%	46.4%
None	3.9%	0.6%	6.1%	4.0%
Total	100%	100%	100%	100%

Figure 21: Factors likely to affect business (all green space respondents)



⁶ At the time this research was conducted the UK economy was in a prolonged recession.

5.2 The economy

Q: How is the recession impacting upon your organisation?

Almost a quarter of respondents (24.6 per cent) say they are recruiting fewer employees as a result of the recession; 13.4 per cent have decreased staff training time.

A total of 14.6 per cent of respondents say the recession has led to an increase in the number of redundancies in the sector, and 7.7 per cent think it has led to an increase in the recruitment of volunteers.

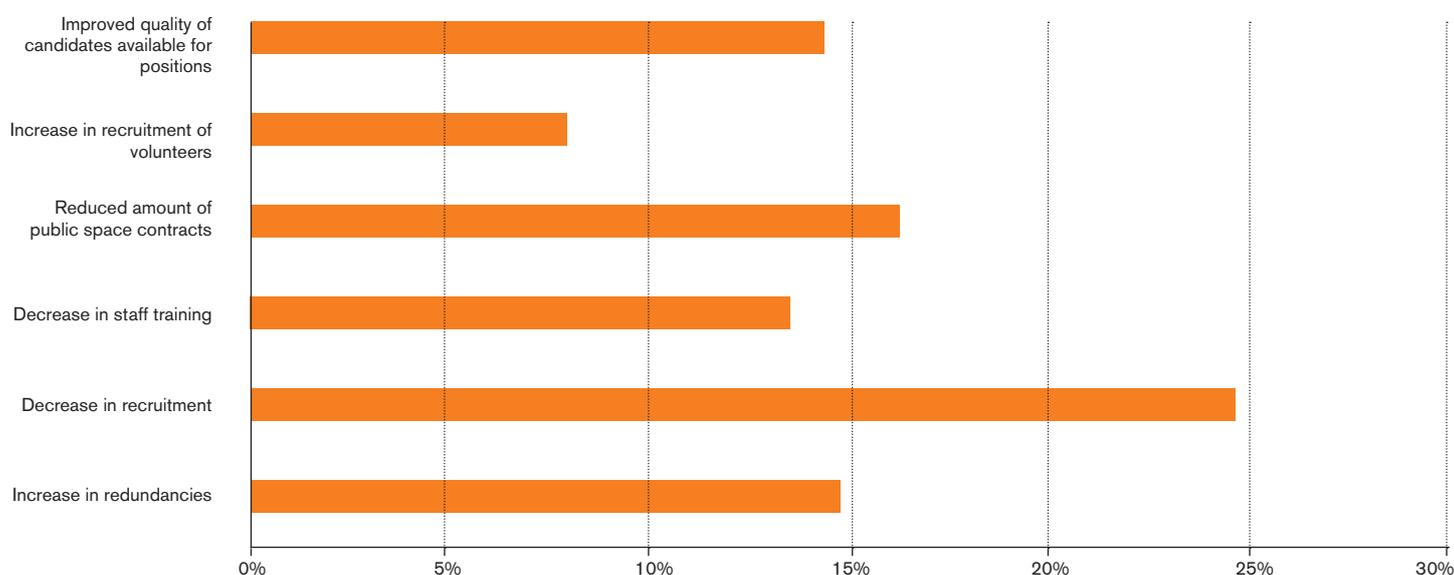
A quarter of public sector organisations (25 per cent) expect a decrease in recruitment levels, and almost 20 per cent say that green space departments may experience a greater reduction in budgets than other local authority departments.

Private sector companies say their primary concern regarding the recession is a reduction in the amount of public space contracts (26.6 per cent); they are also concerned about a decrease in recruitment levels (24.3 per cent).

Table 55: The impact of the recession on green space organisations

Impact	All green space organisations	Public sector	Private sector	Third sector
Increase in redundancies	14.6%	15.0%	14.7%	12.7%
Decrease in recruitment	24.6%	25.0%	24.3%	24.6%
Decrease in staff training	13.4%	12.6%	14.6%	11.4%
Reduced amount of public space contracts	16.1%	5.5%	26.6%	7.5%
Increase in recruitment of volunteers	7.7%	12.3%	2.3%	15.4%
Improved quality of candidates available for positions	14.3%	9.8%	15.5%	24.1%
Local authorities only: green space departments experience greater budgetary cut-backs than others	n/a	19.9%	n/a	n/a

Figure 22: The impact of the recession on green space organisations



5.3 The seven priorities

The CABI led *Skills to grow* strategy sets out actions under seven priorities that the sector should focus on over the next few years. Table 56 sets out which of these each organisation sector sees as the most important actions.

Q: CABI has identified seven priorities for the green space sector. Which three do you think would make the most positive impact on your organisation in the long term?

Table 56: *Skills to grow*: seven priorities to improve green space skills

Priorities	All green space organisations	Public sector	Private sector	Third sector
Increase awareness of the sector and the opportunities it offers, to encourage more people into the sector	48.8%	42.1%	51.5%	54.3%
Increase and improve entry routes and career paths in the sector	35.3%	31.2%	37.5%	36.4%
Improve the availability and quality of training, including continual professional development	51.3%	43.3%	54.1%	58.6%
Improve management and leadership skills	35.7%	40.8%	32.3%	37.1%
Increase the sector's investment in skills	36.9%	38.6%	36.0%	36.4%
Build capacity for co-ordinated working across different parts of the sector	29.6%	33.0%	28.0%	27.9%
Develop and maintain a strong evidence base to make the case for investment in green space skills	53.7%	64.2%	49.4%	45.7%

Appendix 1: Methodology

Defining the green space sector

Before work could begin to gather labour market intelligence for the green space sector, an approach had to be developed to map out exactly what constituted the sector itself. Lantra⁷ had published labour market intelligence on land-based industries but this did not specifically identify skills in relation to green spaces which are accessible and free of charge to the public. Without establishing these sector parameters, a robust and representative sample strategy for gathering labour market information could not have been defined.

The standard industrial classification (SIC) system provides an internationally agreed taxonomy of economic sectors. Under this system, industries are classified into a structure of economic activities that are used in national and international datasets such as those held by the Office for National Statistics (ONS) in the UK, Eurostat for the EU and the United Nations.

The SIC 2007 system was used to identify six principal industry codes which together represent the core green space sector, (see Table 57). Because intelligence needed to be captured in relation to all employers involved in the planning, design, management and maintenance of publicly-accessible green spaces in England, a method was devised for estimating the parts of each SIC code's employment that could reasonably be attributed to that sector.

Calculating green space organisations in England

A mapping exercise was carried out to identify all four-digit SIC codes that could be classified as the green space footprint. The 10 'urban green space' types identified in national planning policy guidance note 17 were then mapped against these SIC codes.

Industry sectors where the principal functions (greater than 50 per cent) add value to publicly-accessible green spaces were then identified. This excludes SIC codes covering sports clubs and town planners, for example.

The total number of business organisations in England for the six identified SIC industry codes were obtained from the Office for National Statistics

(ONS) publication *UK business activity size and location 2009*, table B3.4⁸. Figures for codes 7111/2 and 6820/1 (drilled down to a more specific layer of industry than the publication offered) were acquired directly from ONS⁹.

The proportion of these organisations working within publicly accessible green spaces was calculated using the database of contacts for the survey. As calls were made a record was kept of the proportion of employers who stated they did not work within this type of green space. The results were:

- 85.7 per cent for SIC code 6820/1: Renting and operation of housing association real estate.
- 3.0 per cent for SIC code 7111/2: Landscape architectural activities.
- 3.1 per cent for SIC code 8130: Landscape service activities.
- 24 per cent for SIC code 9104: Botanical & zoological gardens & nature reserve activities.

These proportions were then deducted from the total number of organisations in England for each code to give the total number of green space organisations.

For SIC codes 8411 and 8412, a total of 358 organisations were allocated to the green space sector, representing the total number of local authorities in England (on the basis that each local authority has some responsibility for publicly-accessible green spaces). The total was supplied by a representative body. Although councils are integral to green space operations, they are not covered by specific SIC codes.

⁷ Lantra is the Sector Skills Council for the environment and land-based industries.

⁸ *UK business activity size and location 2009*, Office for National Statistics, Table A3.4, p91

⁹ A specific SIC code for local authorities does not exist. As they are important to the green space sector, data from ONS in relation to SIC codes 8411 and 8412 (the most relevant 'umbrella' codes) was used as a basis for green space unit/organization/employment calculations.

Table 57: Green space SIC (2007) codes

(Explanatory notes detailing are presented in Appendix 2)

SIC 2007 codes
8411 General public administration activities
8412 Regulation of the activities of providing health care, education, cultural services and other social services, excluding social security
7111/2 Landscape architectural activities
8130 Landscape service activities
9104 Botanical & zoological gardens & nature reserve activities
6820/1 Renting and operating of housing association real estate

These codes do not 'represent' the green space sector but contain the vast majority of it. Not all public service activities under 8411, for example, will involve green space activities, and similar considerations apply to most codes in the framework. Certain codes cover green space activities that are not open to the general public, and these have been excluded.

This was found to be an effective way of defining the core activities that make up the green space sector. The research used SIC 2007 as it is recent and includes a new code relevant to the green space sector: 8130 landscape service activities.

Calculating green space employment in England

Figures on the total number of people employed in each SIC (2007) code in England were acquired directly from ONS.

The total number of people employed in England within each relevant SIC code was then divided by the total number of organisations in England. This provided an average number of people employed per organisation, which was then multiplied by the total number of green space organisations to establish total green space employment in England.

Initial interviews with green space employers

In-depth qualitative telephone interviews were conducted with 94 green space employers between August and September 2009.

Following analysis of the key themes and issues emerging from a literature review, a number of discussion questions were identified in order to explore some of these issues further with a sample of green space employers across the public, private and third sectors.

The priority for these qualitative interviews was to capture the views of a cross-section of public, private and third sector employers, speaking primarily to local authorities, registered social landlords and major private sector employers perceived to be three critical groups in the green space sector. Of the 94 interviews undertaken, the following mix of respondents was achieved: 46 per cent public sector; 32 per cent private sector; 21 per cent third sector. These proportions are broadly reflective of green space sector employment in the UK. The responses were used to indicate any areas to add to the core questionnaire. Everyone was asked the same questions.

These initial interviews painted a broad picture of the different types of occupation being undertaken across the green space sector, as well as the proportion of work being undertaken across four broad levels (managerial, technical, skilled trades and elementary). By undertaking these interviews with a mix of public, private and third sector respondents, patterns in respect of the needs and priorities of these three groups could be identified. The discussions also covered the interviewees' views on skills shortages and gaps.

These responses informed the design of the questionnaire for the large-scale telephone survey.

Discussion topics covered:

- Green space occupations that are hard to recruit.
- Green space occupations that are needed, but employers cannot afford to recruit.
- Green space occupations with skills gaps.
- Specific skills gaps within the existing workforce (including soft skills and technical skills).
- Reasons for skills gaps.
- Main differences, including skills needs, within free-to-access public green spaces in contrast to private green spaces.
- External challenges facing the sector now and in the future.
- Impact of the recession.

Survey of green space employers

A total of 1,075 individual responses were obtained from a telephone survey of green space employers. The survey was undertaken between September and October 2009.

Following analysis of the findings of the initial interviews, the questionnaire for the main survey was drafted by Pye Tait Consulting then discussed with CABE Space, English Heritage, Lantra and the Historic and Botanic Gardens Bursary Scheme before being finalised.

To aid the design of individual questions and the choice of response variables, a review was undertaken of the questions asked as part of the

ONS *Labour force survey* as well as the Learning and Skills Council *National employer skills survey 2007*. This was to ensure that the results from the green space survey could be compared – as far as possible – with other sectoral data, as well as future trend analysis should the survey be repeated.

10 0141 - Agricultural service activities, landscape gardening
11 9253 - Botanical & zoological gardens & nature reserve activities

Table 58: Sample strategy for the survey of green space employers

List	Contacts held	% public sector	% private sector	% third sector	Response aim	Quota
Local authority heads of parks	360	100%	0%	0%	250	250 public sector
Mixed: private/third/ government organisations	307	32%	45%	23%	50	15 public sector 25 private sector 10 third sector
Landscape practices	516	0%	100%	0%	50	50 private sector
Natural England recommendations	15	75%	0%	25%	10	7 public sector 3 third sector
Cemeteries	76	72%	4%	24%	30	20 public sector 3 private sector 7 third sector
Registered social landlords	400	0%	0%	100%	200	200 third sector
Groundwork officers	30	0%	0%	100%	10	10 third sector
BALI directory	450	0%	100%	0%	50	50 private sector
SIC 0141 ¹⁰ (list one part one)	1,150	0%	100%	0%		
SIC 0141 (list one part two)	1,150	0%	100%	0%	250	250 private sector
SIC 0141 (list two)	1,656	0%	100%	0%		
SIC 9253 ¹¹	386	56%	26%	18%	100	55 public sector 25 private sector 20 third sector
Total	6,496				1,000	347 public sector 403 private sector 250 third sector

The sample strategy aimed for 1,000 responses, comprising 35 per cent public, 40 per cent private and 25 per cent third sector.

The primary objective of the sample frame was to achieve a balance of respondents across these three groups, taking into account estimated numbers for England in terms of green space organisations/employment/significance to the sector.

Prior to developing the sample frame, no data was available relating to the actual England-wide proportions of public, private and third sector organisations operating in publicly-accessible green spaces.

A number of different contact lists were supplied for the purpose of the research, and a sample was selected from each list to make up the necessary proportions from the public, private and third sectors. Table 66 shows the target versus actual responses from the survey.

Table 59: Target versus actual responses for the survey of green space employers

Quota	Target responses	Target %	Actual responses	Actual %
Public sector	347	35%	338	31.4%
Private sector	403	40%	578	53.8%
Third sector	250	25%	159	14.8%
Total	1,000	100%	1,075	100%

Of the 338 public sector responses, 320 (95 per cent) were from local authorities and 69 (20 per cent) were from urban local authorities.

Of the 159 third sector responses, 61 (38 per cent) were from registered social landlords (RSLs).

A total of 75 responses were achieved over and above the target of 1,000, comprising 12 from the public sector, 36 from the private sector and 27 from the third sector.

The proportion of total actual responses for the third sector is lower than the target. Prior to conducting

the survey it was not known what proportion of RSLs were responsible for/operated in publicly-accessible green spaces. Contact was attempted with 400 RSLs. Of these, only 61 (15.2 per cent) were confident that their work related to these types of green spaces and so were able to participate in the survey.

Analysis of survey results and comparisons with national datasets

Responses to the telephone survey were analysed using Snap survey software and appropriate cross-tabulations of questions were undertaken to identify patterns.

Quantitative labour market information obtained from the survey in respect of the green space sector was compared with matching data from the ONS *Labour force survey* (Quarter 3 2009). A small sample of sectors was used for comparison purposes, including some that were potentially competing with the green space sector for the same workforce skills.

A number of other survey questions not related to labour market information were compared with data from the LSC *National employer skills survey 2007*, providing the basis for benchmarking and possible future trend analysis should the green space survey be replicated.

A note on weighting and confidence

The data from the survey is not weighted because, using the evidence available, there is no reliable way to know how the whole publicly-accessible green space population is structured. This problem is due to issues with the definition of the sector, including deficiencies in both the Standard Industrial Classification (SIC) and Standard Occupational Classification (SOC) systems, which are used to inform many national datasets; and inherent problems in identifying green spaces that are free to the public.

Where margins of error at the 95 per cent level of confidence are judged to be outside acceptable amounts, this has been stated in the text and the impact of the margin of error explained.

All differences commented on in the report have been found to be statistically significant at the 95 per cent level (there is a 95 per

cent chance that the observed difference has arisen due to a true difference in the population rather than through random variation).

Skills gaps methodology

Thirty-nine specific skills were identified as being of core interest at managerial, technical and operational levels throughout the green space sector. These were derived from relevant occupational standards and qualifications, and the list was tested and verified with a pilot group of green space employers.

Survey respondents were asked to score the 39 sector-specific skills in two ways: firstly to reflect how well-skilled their current workforce is (on a scale of one to 10); and secondly, how important each of the skills will be to their organisation in the future (less important scored 1, the same importance scored 2, more important scored 3).

A note on skills scoring

On numerical scales it is common for scores from large numbers of respondents to cluster within quite a small range, even though the scale is much wider. The reason for this lies in human nature rather than statistical science. When asked to score employees on their level of current skills, it is rare to find respondents who will score their entire workforce at less-than-medium levels of skill. They would probably not have employed the staff if their skills were that low, and a low score tends to reflect badly on the organisation itself.

For this reason it is important to focus not on the nominal levels of the scores, but on the range of scores and the divergence from average. Managers will always tend to err on the side of caution when scoring skills for their future importance. There is always a chance that they may have misjudged this; therefore they will tend to score skills relatively highly. Again, it is the range and variation from average that are the most important variables.

Appendix 2: Public green space SIC codes¹²

84.11 General public administration activities:

This class includes:

- executive and legislative administration of central, regional and local bodies
- administration and supervision of fiscal affairs:
 - operation of taxation schemes
 - duty/tax collection on goods and tax violation investigation
 - customs administration
- budget implementation and management of public funds and public debt:
 - raising and receiving of money and control of disbursement
- administration of overall (civil) research and development policy and associated funds
- administration and operation of overall economic and social planning and statistical services at the various levels of government.

This class excludes:

- operation of government owned or occupied buildings (see 68.2, 68.3)
- administration of research and development policies intended to increase personal well-being and of associated funds (see 84.12)
- administration of research and development policies intended to improve economic performance and competitiveness (see 84.13)
- administration of defence-related research and development policies and of associated funds (see 84.22)
- operation of government archives (see 91.01).

84.12 Regulation of the activities of providing health care, education, cultural services and other social services, excluding social security:

This class includes:

- public administration of programmes aimed to increase personal well-being:
 - health
 - education
 - culture
 - sport
 - recreation
 - environment
 - housing
 - social services

- public administration of research and development policies and associated funds for these areas
- sponsoring of recreational and cultural activities
- distribution of public grants to artists
- administration of potable water supply programmes
- administration of waste collection and disposal operations
- administration of environmental protection programmes
- administration of housing programmes.

This class excludes:

- sewage, refuse disposal and remediation activities (see divisions 37, 38, 39)
- compulsory social security activities (see 84.30)
- education activities, (see section P)
- human health-related activities (see division 86)
- museums and other cultural institutions (see division 91)
- activities of government operated libraries and archives (see 91.01)
- sporting or other recreational activities (see division 93).

71.11/2 Urban planning and landscape architectural activities:

This subclass includes:

- town and city planning and landscape architecture.

81.30 Landscape service activities:

This class includes:

- planting, care and maintenance of:
 - parks and gardens for:
 - private and public housing
 - public and semi-public buildings (schools, hospitals, church buildings)
 - municipal grounds (parks, green areas, cemeteries)
 - highway greenery (roads, train lines and tramlines, waterways, ports)
 - industrial and commercial buildings

¹² UK standard industrial classification of economic activities 2007 (SIC 2007): explanatory notes

- greenery for:
 - buildings (roof gardens, façade greenery, indoor gardens)
 - sports grounds (football fields, golf courses), playgrounds, lawns for sunbathing and other recreational parks
- stationary and flowing water (basins, alternating wet areas, ponds, swimming pools, ditches, watercourses, plant sewage systems)
- plants for protection against noise, wind, erosion and visibility.
- sheltered or supported homes
- operation of services to help residents improve their communities
- offering homes through a shared ownership scheme
- development for building projects for own operation.

This class excludes:

- commercial production and planting for commercial production of plants and trees (see divisions 01, 02)
- tree nurseries and forest tree nurseries (see 01.30, 02.10)
- keeping land in good environmental condition for agricultural use (see 01.61)
- construction activities for landscaping purposes (see section F)
- landscape design and architecture activities (see 71.11).

91.04 Botanical & zoological gardens & nature reserve activities:

This class includes:

- operation of botanical and zoological gardens, including children's zoos
- operation of nature reserves, including wildlife preservation.

This class excludes:

- landscape and gardening activities (see 81.30)
- operation of sport fishing and hunting preserves (see 93.19).

68.20/1 Renting and operating of housing association real estate:

This subclass includes:

- renting and operating of self-owned or leased real estate which is used for housing association activities only
- renting and operating of housing association-owned real estate including the following:
 - apartment buildings and dwellings
 - land
 - homes for rent for those who are vulnerable, on low income and/or key workers

Appendix 3: Survey literal responses

The following pages list the literal responses received from respondents in the main survey. In some cases, where indicated, responses have been filtered to show which sector (public, private or third) an organisation is responding on behalf of.

The list below details the contractors used by public sector organisations only to undertake public green space work. Figures in brackets denote the total number of times a specific contractor was mentioned, if more than once.

Q5: Which contractors do you use for public green space work?

English Landscapes (x9)
Glendale Services (x8)
Enterprise PLC (x6)
ISS Waterers Landscapes (x3)
John O'Connors Ground Maintenance Ltd (x3)
Continental Landscapes Ltd (x3)
Serco (x2)
Tree Maintenance (x2)
Gristwood and Toms (x2)
Grounds Maintenance (x2)
Elementary work & skilled trade work
In-house street scene team
Phil Gottschalk
In-house maintenance team
Mawing
Small local contractors, but really in-house
Small local ones
Kent County Council landscape services (x2)
All over the UK
NORSE
Repair works and sometimes tree work
Forestry Commission
Mitie PLC (but some done in-house too)
Grounds maintenance workers
City Council, Quadrant Service Team
English Landscapes, Banyards Ltd
City Council (x2)
Aliadron Services
Wyvell, P&S Weed Control
Focsa
Conolls Gardening Services
Harold Heath, Langards, Andy Dorhock, Ian Truman
DLOs, external private companies
Quadron Services
Subcontracted within county council
Local contractors
Specialists
Tree Management

Lots, based on BALI membership
UPM Tilhill, Foster Playscapes, Ford
Prison, Probation Service
Tree jetting (climbing). Grass cut
West Midlands Forestry
Wildlife Trust
Tree Work
Ian Truman Services
Cleveland Land Services
Langard, Bankcross
Groundwork, PATH
WS Atkins
Rice Landscaping, Wyevale
Diamond
Kier
Direct Services, Plantscape Ltd
In-house city council and Fletchers
Local contractors
Smartcut, Fountain Support Services
Gristwood and Toms
Fountains PLC, Bow Maintenance &
Landscapes, Sector Guard, various others
All the routine is contracted out
Woodland Trust, Thurrock District Council
Martin Granger
Direct Services, OCS Horticulture
Cornwall Council
Ringway
Connaught
Grass technicians, KPL
Kelp & Meekin
G Burley & Sons

Listed below are the 'other' types of green spaces that organisations worked within that were not included in the list of survey options.

Q9: In which of the following types of green spaces does your organisation work (other)?

Gravel restoration - lakes as a result of that
Visitor centre, car park, fishing pavilion
Specialist water display company
Heritage/archaeological spaces
Cutting trees back from power lines
Highways
Trade stands at show
Sheltered accommodation, reservoirs, forestry
Rights of way - safety
Hedgerows
Hedgerows - forestry
Car parks, supermarkets
Commercial, care homes
Highway verges
Categoriser tree works
Heritage sites
Business parks
Retail parks
Canal
Canals and water-space design
Beaches
Water bodies/lakes streams. Tree management
Business
Roadside verges
Separate countryside department
Ancient monuments
Waterfronts, marinas, canals
Rightcliffe countryside project
Schools
Schools, hospitals, supermarkets
Schools
Hospitals
Estate management
Car parks for industrial estates
Agricultural land
Agriculture
Highways
Gardens and ground of restaurants
Private
Resident estates/housing. Industrial parks
Private work
Reclamation schemes for waste sites
Domestic
Schools
PGC guidance
Private

Schools, councils, private
Sheltered housing
Demolition sites
Highways
Sea fronts
Footpaths
Open gardens
Hospices, universities
Hospital ground
Supermarkets/building sites, care homes
Schools
Hospitals
Town squares, waterfront access
Marinas
Agricultural
Road accidents, nature reserve, health and safety
Council contracts

Similarly, the responses to question 23 list the methods used by organisations to arrange training for staff that were additional to the options listed in the survey.

Q23: Over the past year, what methods have you used to arrange training for your staff (other)

Service scheme - countryside educational visits, accreditation scheme
Part of contact with residential volunteers through RSPB
Partnership with Moth Society, who come in and talk to volunteers but [staff] sit in and learn the job too.
Online training through county council
On the job volunteers - a lot of internal training
Training development scheme - five days related training time
NVQ
NVQs
Trainee organisation called Countryside Training
Services provides cheaper training and job advice
H&S courses
Members of training groups
CDD
Skill sharing within organisation
Cascading used - reporting back
Site visits to other authorities
Visit other parks and councils
NFU
'Get on move on' to get people up to NVQ2
Freeze on everything
Green Space North West training group - environmental management training for rangers - degree level

Worked with consultants on field work for recent green space audit - this was called a 'consultants mentoring'
Carry out supervisions and appraisals every year and from there identify training needs
Postgraduate, BTEC, CPD
NVQ
CPD
Further learning
Continual professional development
LANTRA especially
CPD plan 30 hours minimum training for our staff
Formal qualifications
LEA training
Nothing in department
Countryside Training Services
NVQs
Day release
Assessments
Phone and computer based
External training
CPD
CPD
Lantra
Offer instruction & lecturing himself - research
Weed spray courses
Specialist staff
All self taught. Do it as and when
Study days - seeing what's out there
Internet
Internet based
A bit of all
Dependant on individual - personal improvement programme
Supportive of organisations - when in training
self support networks for people in sector such as email groups, case studies
Unable to do specific green space training
Specialist trainers – on-site visits
Health and safety - external
External - colleges
CPD - program
No training in last 12 months
Run in-house training scheme and link up with local schools
Learning through experience
Appraisal process
Making appraisals
Online degree being undertaken
Professional reading
Train to gain
Members are already trained
CPD

Part-time university courses
Home learning
Contractor training day - onsite pruning training
College training
Too expensive
Part-time course at university
College courses
Online
External mentoring
No formal training, information gathered from publications
Home learning
Only employ experienced staff
GIS systems
Work placements
None needed now
College based
Qualifications are as and when needed with regards to employment
Health and safety
Trains them himself
Employed a junior staff member who will be shadowing the garden/designer to learn free job training
Web-based
Apprentices NVQs
NPTC
Tests
Internal CPD, reading materials
Postgraduate qualification
Not needed
College courses
None
Specialist tutors, specific targets
External training providers
Self-led IT training
NVQ
NVQ web training

Organisations were asked if there were any other barriers that posed problems in relation to external training provision, apart from those listed in the survey question.

Q24: What barriers, if any, prevent you from providing more training (other)?

Tried to get government support
Finding out availability
Identifying suitable training
A need doesn't exist, we provide training for others
No work
Commercial need to ensure they're generating a fee for work
Resources - releasing staff for jobs
Weather good
Workload constraints - too large
Currently a freeze on all training
Councils tend to re-deploy staff into park services & they come with no horticultural qualifications - so don't supply a budget
In terms of strategy and planning - green space considerations are becoming more important - lack of skills
Weak content - too basic for experienced staff
Low quality training is a big problem
Most training internal due to the large variety of skills in the National trust
Weak content of courses
Weak content of course
Cheaper to deliver it in house
PHD, masters courses only interest us
Can train on the job very easily
Location
If a college course is organised the students turnover is too low
Availability and location
Location, hard to get staff too
Thinks external training quite good
Not enough government funding
Locations
Would like to network
Landscape institute not recognised courses meaning no funding. Individual learning accounts not supplied
Small pockets of land limit training
Limited by volunteers
Staff generally act as lecturers and tutors for courses
Resistance by management
No value for money
Not valuable
Physical remoteness of site
Too many health and safety requirements

Doesn't feel that at her age training is a good investment
Only take on jobs that I have the skills for
None as our customers always come back
Not enough candidates with basic qualifications
Opportunity and funding
Loss of resources
Has to be done through contractors
Shortage of courses, staff with disabilities, ground maintenance
Time wasting on courses, losing income on staff when training, courses not value for money, drag out too long
Not enough choice
Deprived environments
Finding people with commitment
No limit on training
Management discretion
Not knowing
Only need re-training after six years
As far as the interviewee is aware no problems have been experienced
Trial periods for staff
Public's perception of commitment
Perception of spending money on training in strained times.
Single status job evaluation
Staff commitment - apprentice attitudes
Too many people talking and not doing
Lack of understanding from SMT
Time away from work
Capacity
Mandatory training

Organisations reported a number of job roles, in addition to those listed in the survey question, which they found hard to recruit to because of a shortage of skills.

Q25: What green space job roles does your organisation need that you find hard to recruit because of a shortage of skills?

Site maintenance manager
Grave digger
Forestry operative
Apprentices
Plant machinery
Chemical sprayer
Tree landscape officer
Strategic grounds officer
Countryside assistant
Community engagement officer
Craftsman
Contracts manager
Supervisor
Diversity expert
Historic environment officer
Supervisors
Public liaison
Green space manager
Consultants, researchers
Conservation officer
Countryside officer
Community development officer
Grounds maintenance
Tree planters
Technical posts
Development officer
General management
Managerial and technical
Bursar
Project officer
Education manager, estate team
Information officer
Labourer
Playground maintenance
Senior foreman
Sport line marker
Contractors, bricklayers
Environmental planner
Urban designer
Graduates with writing skills
Administrator
Consultants
Visitor Services Manager
Caretaker

Organisations also listed a number of additional job roles they really needed but could not afford to recruit.

Q26: What green space job roles does your organisation really need, but cannot afford to recruit?

Security
Profile raising manager
Superintendent
Cemetery operatives
Skilled technical staff
Researchers
Site agents
Community officers
Technical assistant
Enforcement officers
Building manager, community manager
Technical experts
Urban designer
Day release
Events and activities staff
Marketing manager
Project manager, development manager, accountant
Marketing
Project manager
Night ranger
Boat handlers
Security
Grounds maintenance
Urban designers
Education ranger, front of house
Assistant
Community involvement officer
Administrator
Marketing
Resident conservation manager x3
Fencer
Community development
Allotments/events officer
Education manager
Project manager
Accountant

In scoring the importance of skills within their organisation, a small number of respondents scored other skills not included in the main survey list.

Q27: On a scale of 1 to 10, how would you rate the skill level of your staff (1 = unskilled 10 = perfectly skilled)?

Grazing scheme - skilled trade - 9
Grazing (horses graze) - 7
Deer graze grassland - 8
Grassland management - 9
Company/business administration - 8
Funding knowledge - 6
Websites - 2
Patio - 10
With technical staff I'm looking for qualified specialists whose knowledge should be between 8 and 10
Fencing - 10
Drainage - 10

A small number of respondents cited some 'other' skills as likely to be of more or the same importance in the future.

Q28: In the future, will this skill be less important, the same or more important?

Grazing schemes - same
Specialist to remove vegetation skilled trade - same
Grazing scheme - skilled trade - same
Technical architecture - same
Tree works - same
Landscape maintenance - same
Commissioning contract work - more
Driving trailer - more
Finance - in-house service in terms of cost strategy for long term planning - more
Skills sourced and taught in-house, skills that involve generating machinery, funding knowledge - more
Websites - more
Translating design to reality - more
Grazing cattle - same
Technical habitat creation alongside public access - more
Nursery production - same
Understanding allied professions - more

A small number of respondents cited some other skills that they buy in from external organisations.

Q29: Do you buy in this skill externally?

Dairy group consultancy on farming
Technical - lake management
Technical architecture
Tree works
Tree consultancy
Training
Buy in Glendale to do everything from marketing to maintenance
Landscape maintenance
Grassland management
More interest in planting more trees to mitigate climate change, and varieties of trees
RoSPA to verify checks for maintenance of play areas (annual)
Heritage gardening skills such as hedging (specialist skills) very lacking. No traditional skills
Skilled trade and elementary is 50/50 between council workers and contracted workers
Design technician
Visual influence enquiry
Economic viability of proposals
Ecology
Specialist areas
Ecology
Consultant
Contractors for some footpath improvements
Grazing cattle
Skilled trade - damage of pond
CGIs
Chemical applications - spraying
Nursery production
Arboriculturalist consultancy
External expert to verify tree maintenance (every three years)
Surveyor
Geotechnical
Trees specialist
Arboriculture
Grazing (horses)
Architects for playground design
Graphic design

Respondents were asked to choose the factors most likely to affect their business over the next two years. The results included a number of factors not included in the survey options list.

Q30: Which of the following factors are likely to affect your business over the next two years?

Cuts - political not statutory
Comprehensive spending review 2011/12
Health and safety makes life difficult and constraints on income generation
Possible privatisation coming up - contract (work out to tender)
Privatisation from April 2011 - maintenance to contractors
Concerned at limiting effect health and safety is having
Small business
Legislation, political correctness
Government facilities
As a contractor no problem on recruitment - if someone leaves replacement is sorted through the organisation
Political - local and central
Environmental concern
Lack of work
Shortage of work
Change and uncertainty in the organisation, morale is a real factor
People - honeypot effect - park has too many people in it due to recession so at certain times of the year this is a problem
Schools might have trouble with their funding which would stop them coming, and safety aspect (animals)
Government influence
Morale - in a situation where there are potential cuts, keeping people focused
Council - no money, no jobs
Disease controls, e-coli outbreaks for example
Lack of continuity when key manager retires
General time
Weather
Not so many trade stands
Restructure
Planning department is always inundated with applications
General election
Ownership/privatisation is main worry
Aging work force
The business/new management
Expectations rather than skills - people thinking it's an easy sector to progress in
Private sector - sector will move away from getting skills it needs to acting as a 'money horse'

Economic climate
Efficiency reviews
Political interference
Lack of government support
Depends on the Conservatives
Exchange rates
Regulators - health and safety is slowing work down; diversity impacts on services and skills; ecology
Contractors
Insufficient skills overall
Government policy
Uncertain future
Squeezed by local government
Not enough skilled people, too much paperwork for teachers
Customers
Outsourcing of services, devolution of allotments, online sports pitch bookings, outsourcing arboriculture
Old-fashioned jobs
Public aspirations and expectations
People will be working longer
Local authority structure
Contracts expire
Smaller practices struggling to compete due to legislation
Undercut by cowboys
No funds
Nothing
Training
Saturation of tree surgery businesses
Employment situations this reflects on gardens
Motivating young people, i.e. apprentices
People want to earn more money so are moving to different sectors
Team working - getting better
New industry entrants attitude and aptitude
Lack of business
New people are lacking skills
Public's perception of what should be happening
Political climate
Climate change
Finding skilled staff
Market in general
Economic climate
Too many new entrants
New company
Section 106 - woodland
Lack of work
Been asked to take early retirement
New entrants lack business skills, no combined courses
Climate change

Council cutting recruitments too
many panels to get staff
Climate change

Q32: CABE has identified the following seven priorities for the green space sector. Which three do you think would make the most positive impact on your organisation in the long term?

Cost of the training, length of the training
All equally important
Increase funding and staffing in local green space, mainly urban parks, increase horticultural wages
Career path, increased skills/management
Shortfall of funding - main issue local amenities spending money - don't like council tax
Use of mechanised equipment needs to be reviewed to reduce carbon effects and plan for future
More funding
Have a more even base for landscape contracts, rather than putting everything through large firms
Increase awareness of politicians/decision makers of benefits of green space to health & well-being
Improve funding and investment into open spaces
Ability to retain trained staff
Improve public agenda - listen to public's needs
Do not rely on local authorities
Central government should put more money into green space
Improve budget
Unattractive pay levels
Encourage use of landscape designers
Encourage local authorities to take on smaller businesses
Extend investment
Funding - dependant on local authority - dependant on politicians
All depends on the specific area that needs certain qualities
Raising the profile and the prestige - more money and recognising skills needed and better pay
People don't want to go into it - not too popular - want it easy
Needs placing higher up the government's agenda (green space sites etc)
Create a demand for green spaces to attract more people to use facilities
Supply and demand
Increasing awareness to allow the other priorities to become active
All of equal importance and impact
Keep the same staff and are keen to look after them
Marketing

Investments in our sector as the wrong people are working in our sector - need hands-on PR
Seeing the importance of green spaces, for example green spaces for play's effect on physical and mental health
Entry routes, making it look more appealing
Physical work to be encouraged, attitude
Build awareness of what landscape architects do and can do
Not really relevant/not relevant at the moment
Promotion of the business
Small business, two-man team
Training improvements
Awareness has decreased, poorly qualified staff with no basic knowledge and understanding
Better training
Nearing retirement age so long-term priorities are not a concern
Compact area, business more skills, more materials
Raise the profile
Availability of good contractors is not sufficient to implement designs
Improve training and education
Apprentices in administration
NVQ levels and diplomas not detailed enough
NVQ is diabolical
More jobs on open spaces
Less rules and regulation and more hands-on
Increase in training generally
Evidence - crucial; climate change; health agenda
Do not need more people in sector
Change the way training is done to more practical apprenticeships
Greater awareness by CABE of arboriculturalist matters, they don't know enough
Better training for the trainers
Having a proper park service
Sustainability
People who teach need more experience of the actual work

Questionnaire to establish the size and shape of the green space sector in England

Does your organisation/department undertake work to do with green spaces that are accessible free of charge to the public?

[If NO – thank the respondent for their time and end the call]

Q1a. Name

Q1b. Job title

Q1c. Organisation and department (if relevant)

Q1d. Telephone/Email

PART 1: SIZE AND SCOPE

[NOTE THAT LOCAL AUTHORITY RESPONDENTS SHOULD REPRESENT THEIR GREEN SPACE DEPARTMENT AND NOT THE L.A. AS A WHOLE. I.E. REPLACE 'ORGANISATION' WITH 'DEPARTMENT']

Q2. [Interviewer to record organisation category – check if unsure]

- Public Private Third sector

Q3. Which of the following statements best describes the function of your organisation in relation to green spaces:-

- Land owner Land Manager [go to Q6]
 Contractor [go to Q6] Consultant [go to Q6]

Q4. As a land owner, do you contract out any of your green space maintenance?

- Yes No [go to Q6]

Q5. Which contractors do you use for public green space work?

Q6. Which of the following statements best describes your organisation's role in relation to green spaces:-

- Planning Design
 Management Maintenance

Q7. Roughly what proportion of your total annual work is to do with green spaces accessible free of charge to the public?

___%

Q8. Roughly how many TOTAL STAFF do you employ?

___ vol.

Q9. In which of the following types of green spaces does your organisation work? *(prompt and tick all that apply)*

- Parks and gardens
 Amenity green space around housing
 Civic spaces and streets
 Allotments, community gardens and city farms
 Cemeteries and churchyards
 Outdoor sports facilities
 Provision for children and teenagers
 Natural green spaces
 Other – please specify

Q10. What proportion of your staff are:-

Full time ___%
 Part time ___%

What proportion of your staff are:-

Permanent ___%
 Non-permanent – fixed contract ___%
 Non-permanent – agency temping ___%
 Non-permanent – casual labour ___%

Questionnaire to establish the size and scope of the green space sector in England

Q11. - What proportion of your staff work at each of the following four levels: managerial; technical; skilled trades and elementary. [*Refer to separate sheet if necessary*]

Managerial	___% -
Technical	___% -
Skilled Trades	___% -
Elementary	___% -

Q12. On average, how many volunteers do you have helping per year, and approximately how many total volunteer work days are donated per year?

___ no. volunteers ___ work days

Q13. - Roughly what is the percentage split between male and female staff?

Male ___% Female ___%

Q14. - Roughly what proportion of your staff are aged:-

16-24	___%	25-39	___%
40-59	___%	60-64	___%
65+	___%		

Q15. Roughly what proportion of your staff identify with the following ethnic groups?

White	___% -
Mixed	___% -
Asian or Asian British	___% -
Black or Black British	___% -
Chinese	___% -
Other ethnic group	___% -

Q16. What proportion of your staff have a disability that substantially limits their day to day activities, or affects the kind or amount of work they might do?

___%

PART 2: QUALIFICATIONS AND TRAINING

Q17. Roughly what proportion of your green space staff are qualified at the following levels:-

Level 4 and above (degree equiv)	___% -
Level 3 (A-level equiv)	___% -
Level 2 (GCSE A-C equiv)	___% -
Level 1 (GCSE D-G equiv)	___% -
No qualifications held	___% -

Q18. Does your organisation currently offer work experience placements or internships related to green spaces?

Yes No Don't Know

Q19. Does your organisation currently run apprenticeship schemes for green space workers?

Yes No [go to Q21]

Q20. - How many apprentices do you currently employ?

___ vol.

Q21. Are you aware of the new Diploma in Environmental and Land-Based Studies that was made available for teaching within schools from September 2009?

Yes No

Q22. - How much money is spent on training per year?

£ _____

Q23. Over the past 12 months, what methods have you used to arrange training for your staff? (*prompt and tick all that apply*)

- On-the-job training and coaching
- On-the-job exchange programmes
- Off-the-job training courses
- Off-the-job conferences or seminars
- Other – please specify

Q24. What barriers, if any, prevent you from providing more training? (*prompt and tick all that apply*)

Questionnaire to establish the size and scope of the green space sector in England

- Too costly
- Too time-consuming
- Staff turnover too high
- Staff not keen
- No suitable training providers in the local area
- Courses don't cover appropriate subjects
- Not enough short courses
- Lack of practical skills training
- Lack of management training
- Staff don't need it
- No problems experienced
- Other – please specify

Allotments Officer	
Arboriculturalist	
Ecologist (includes conservation/biodiversity roles)	
Gardener	
Greenkeeper/groundsman	
Horticulturalist	
Landscape Architect	
Landscape/Parks Manager	
Landscape Planner	
Countryside Ranger/Warden	
Parks Ranger/Warden	
Tree Surgeon	
Other ¹⁵ :	

PART 3 - SKILLS

Q25. What green space job roles does your organisation need that you find hard to recruit because of a shortage of skills? *(prompt if asked and tick all that apply)*

Allotments Officer	
Arboriculturalist	
Ecologist (includes conservation/biodiversity roles)	
Gardener	
Greenkeeper/groundsman	
Horticulturalist	
Landscape Architect	
Landscape/Parks Manager	
Landscape Planner	
Countryside Ranger/Warden	
Parks Ranger/Warden	
Tree Surgeon	
Other ¹⁴ :	

Q26. What green space job roles does your organisation really need, but cannot afford to recruit? *(prompt if asked and tick all that apply)*

Employers in the green space sector have been telling us which skills are important, and CABE is anxious to get a more detailed insight. We would like your answers to three questions, in relation to some specific skill area

¹⁴ Other roles might include Fundraiser/Event Organiser

¹⁵ Other roles might include Fundraiser/Event Organiser

(prompts – read out)	On a scale of 1 to 10, how would you rate the skill level of your staff?	In the future, will this skill be less important, the same, or more important?			Do you buy in this skill externally?	
	1 = unskilled 10 = perfectly skilled	Less	Same	More	Yes	No
Managerial						
Planning the improvement of sites						
Planning strategies and policies						
Planning for sustainability and climate change						
Managing budgets and fundraising activities						
Marketing and promoting sites						
Complying with legal and regulatory requirements						
Involving volunteers						
Working in partnership with other organisations						
Engaging with the public about green space matters						
Leading and managing people						
Technical						
Managing projects						
Creating designs which are fit for purpose						
Coordinating data collection						
Maintaining the condition of sites after creation						
Identifying risks to health, safety and security						
Understanding and managing historic gardens and landscapes						
Design/managing for sustainability and climate change						
Networking						
IT professional skills						
Written communications						
Problem solving						
Skilled Trades						
Maintaining the health and condition of turf						
Planning plant beds						
Propagating plants						
Sustaining plant development						
Understanding plant growth cycles						
Understanding plant health						
Managing pests and diseases						
Maintaining woodlands						
Tree climbing techniques						
Operating complex machinery						
Elementary						
Keeping sites clear of waste						
Basic maintenance of grassed areas						

Questionnaire to establish the size and scope of the green space sector in England

Basic maintenance of planted areas							
Handling plant material properly							
Using tools and equipment properly							
Customer handling and dealing with the public							
Team-working							
Oral Communication							
Other (note the category, skill and scores)							
Specify:							
Specify:							
Specify:							

PART 4 – IMPACTING FACTORS

Q27. Which of the following factors are likely to affect your business over the next two years? (*prompt and tick all that apply*)

- Skilled employees due to retire
- Insufficient supply of new industry entrants
- Insufficient skills among new industry entrants
- Increasing competition
- Funding constraints
- None
- Other (please specify)

Q28. Which of the following statements describes how the recession is impacting upon your own organisation? (*prompt and tick all that apply*)

- Increase in redundancies
- Decrease in recruitment
- Decrease in staff training
- Reduced amount of public space contracts
- Increase in recruitment of volunteers
- Improved quality of candidates available for positions
- Local Authorities only: Green space departments experience greater budgetary cut-backs than other departments

Q29. CABE has identified the following seven priorities for the green space sector. Which THREE do you think would make the MOST positive impact on your organisation in the long term? (*prompt and tick three*)

- Increase awareness of the sector and the opportunities it offers, to encourage more people into the sector
- Increase and improve entry routes and career paths in the sector
- Improve the availability and quality of training, including continual professional development
- Improve management and leadership skills
- Increase the sector's investment in skills
- Build capacity for coordinated working across different parts of the sector

Questionnaire to establish the size and scope of the green space sector in England

- Develop and maintain a strong evidence base to make the case for investment in green space skills
- Other (please specify)

That's it – thank you very much for your time. I just need to confirm that your answers will be kept in confidence by Pye Tait Consulting and that you may be contacted again in the next week or two in order to confirm that this interview was conducted correctly and to your satisfaction. If you have any queries please contact XXXXX at Pye Tait Consulting on 01423 509433.

In July 2009 CABE, in partnership with English Heritage and the Heritage Lottery funded, Historic and Botanic Garden Bursary Scheme, commissioned Pye-Tait Consulting to carry out research to identify the total size, scope and labour market status of the green space sector in England. This report presents the findings of that research.

CABE
1 Kemble Street
London WC2B 4AN
T 020 7070 6700
F 020 7070 6777
E enquiries@cabe.org.uk
www.cabe.org.uk

Commission for Architecture
and the Built Environment

The government's advisor
on architecture, urban design
and public space

As a public body, CABE encourages policymakers to create places that work for people. We help local planners apply national design policy and advise developers and architects, persuading them to put people's needs first. We show public sector clients how to commission projects that meet the needs of their users. And we seek to inspire the public to demand more from their buildings and spaces. Advising, influencing and inspiring, we work to create well designed, welcoming places.

CABE Space is a specialist unit within CABE that aims to bring excellence to the design, management and maintenance of parks and public space in our towns and cities.

Published in 2010 by the
Commission for Architecture and
the Built Environment

Graphic design by
Draught Associates

All rights reserved. No part of this publication may be reproduced, stored in a retrieval system, copied or transmitted without the prior written consent of the publisher except that the material may be photocopied for non-commercial purposes without permission from the publisher. This document is available in alternative formats on request from the publisher.



The Historic and Botanic Garden Bursary Scheme



LOTTERY FUNDED



ENGLISH HERITAGE



67

If you require an alternative accessible version of this document (for instance in audio, Braille or large print) please contact our Customer

Services Department:

Telephone: 0870 333 1181

Fax: 01793 414926

Textphone: 0800 015 0516

E-mail: customers@english-heritage.org.uk