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

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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.

<table>
<thead>
<tr>
<th>SIC code</th>
<th>SIC description</th>
<th>Total number of organisations (England)</th>
<th>Number of organisations in green space sector</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td>Total</td>
</tr>
<tr>
<td>8411</td>
<td>General public administration activities</td>
<td>2,255</td>
<td>358</td>
</tr>
<tr>
<td>8412</td>
<td>Regulation of health care, education, cultural services and other social services, excluding social security</td>
<td>80</td>
<td></td>
</tr>
<tr>
<td>7111/2</td>
<td>Landscape architectural activities</td>
<td>780</td>
<td>757</td>
</tr>
<tr>
<td>8130</td>
<td>Landscape service activities</td>
<td>13,180</td>
<td>12,771</td>
</tr>
<tr>
<td>9104</td>
<td>Botanical &amp; zoological gardens &amp; nature reserve activities</td>
<td>255</td>
<td>194</td>
</tr>
<tr>
<td>6820/1</td>
<td>Renting and operating of housing association real estate</td>
<td>5,125</td>
<td>782</td>
</tr>
<tr>
<td>Total</td>
<td></td>
<td>21,675</td>
<td>14,862</td>
</tr>
</tbody>
</table>

* Source: UK business activity size and location 2009, table B3.4
Table 2: Number employed in the green space sector in England

<table>
<thead>
<tr>
<th>SIC code</th>
<th>SIC description</th>
<th>Total number employed (England)</th>
<th>Number employed in green space sector</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td>Total</td>
</tr>
<tr>
<td>8411</td>
<td>General public administration activities</td>
<td>293,622</td>
<td>53,920</td>
</tr>
<tr>
<td>8412</td>
<td>Regulation of health care, education, cultural services and other social services, excluding social security</td>
<td>58,064</td>
<td>-</td>
</tr>
<tr>
<td>7111/2</td>
<td>Landscape architectural activities</td>
<td>4,421</td>
<td>4,289</td>
</tr>
<tr>
<td>8130</td>
<td>Landscape service activities</td>
<td>43,053</td>
<td>41,717</td>
</tr>
<tr>
<td>9104</td>
<td>Botanical &amp; zoological gardens &amp; nature reserve activities</td>
<td>13,868</td>
<td>10,550</td>
</tr>
<tr>
<td>6820/1</td>
<td>Renting and operating of housing association real estate</td>
<td>75,249</td>
<td>11,481</td>
</tr>
<tr>
<td>Total</td>
<td></td>
<td>488,277</td>
<td>121,957</td>
</tr>
</tbody>
</table>

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

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

<table>
<thead>
<tr>
<th>Sector</th>
<th>Organisations</th>
<th>Employment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Public sector</td>
<td>6.6%</td>
<td>50.4%</td>
</tr>
<tr>
<td>Private sector</td>
<td>86.5%</td>
<td>37.9%</td>
</tr>
<tr>
<td>Third sector</td>
<td>6.9%</td>
<td>11.7%</td>
</tr>
<tr>
<td>Total</td>
<td>100%</td>
<td>100%</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Organisation Type</th>
<th>Average Staff</th>
</tr>
</thead>
<tbody>
<tr>
<td>Public sector</td>
<td>70.3</td>
</tr>
<tr>
<td>Private sector</td>
<td>18.9</td>
</tr>
<tr>
<td>Third sector</td>
<td>19.3</td>
</tr>
<tr>
<td>All</td>
<td>34.7</td>
</tr>
</tbody>
</table>
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

<table>
<thead>
<tr>
<th>Gender</th>
<th>England people in work*</th>
<th>All green space organisations</th>
<th>Public sector</th>
<th>Private sector</th>
<th>Third sector</th>
</tr>
</thead>
<tbody>
<tr>
<td>Male</td>
<td>53.3%</td>
<td>71%</td>
<td>70.3%</td>
<td>73.0%</td>
<td>65.4%</td>
</tr>
<tr>
<td>Female</td>
<td>46.7%</td>
<td>29%</td>
<td>29.7%</td>
<td>27.0%</td>
<td>34.6%</td>
</tr>
</tbody>
</table>

* 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 definitions.

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

<table>
<thead>
<tr>
<th></th>
<th>All green space organisations</th>
<th>Public sector</th>
<th>Private sector</th>
<th>Third sector</th>
</tr>
</thead>
<tbody>
<tr>
<td>Average percentage of</td>
<td>8.0%</td>
<td>5.0%</td>
<td>8.5%</td>
<td>4.3%</td>
</tr>
<tr>
<td>disabled staff</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Probable percentage</td>
<td>5.46-10.46%</td>
<td>4.6-12.4%</td>
<td>0.1-8.5%</td>
<td></td>
</tr>
<tr>
<td>given the margins for</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>error³</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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

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


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

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

<table>
<thead>
<tr>
<th>Type of employment</th>
<th>England*</th>
<th>Public sector</th>
<th>Private sector</th>
<th>Third sector</th>
</tr>
</thead>
<tbody>
<tr>
<td>Full time</td>
<td>73.8%</td>
<td>87.3%</td>
<td>88.7%</td>
<td>79.5%</td>
</tr>
<tr>
<td>Part time</td>
<td>26.2%</td>
<td>12.7%</td>
<td>11.3%</td>
<td>20.5%</td>
</tr>
</tbody>
</table>

* 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

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

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

* 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

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

### 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**

<table>
<thead>
<tr>
<th>Function</th>
<th>Land owner</th>
<th>Land manager</th>
<th>Contractor</th>
<th>Consultant</th>
</tr>
</thead>
<tbody>
<tr>
<td>Public</td>
<td>27.8%</td>
<td>23.0%</td>
<td>23.5%</td>
<td>25.8%</td>
</tr>
<tr>
<td>Private</td>
<td>27.8%</td>
<td>23.0%</td>
<td>23.5%</td>
<td>25.8%</td>
</tr>
<tr>
<td>Third</td>
<td>27.8%</td>
<td>23.0%</td>
<td>23.5%</td>
<td>25.8%</td>
</tr>
</tbody>
</table>

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**

<table>
<thead>
<tr>
<th>Sector</th>
<th>Land owner</th>
<th>Land manager</th>
<th>Contractor</th>
<th>Consultant</th>
</tr>
</thead>
<tbody>
<tr>
<td>Public sector</td>
<td>62.1%</td>
<td>69.8%</td>
<td>10.7%</td>
<td>12.0%</td>
</tr>
<tr>
<td>Private sector</td>
<td>8.0%</td>
<td>10.0%</td>
<td>85.5%</td>
<td>83.1%</td>
</tr>
<tr>
<td>Third sector</td>
<td>30.0%</td>
<td>20.3%</td>
<td>3.8%</td>
<td>4.9%</td>
</tr>
</tbody>
</table>

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**

<table>
<thead>
<tr>
<th>Sector</th>
<th>Planning</th>
<th>Design</th>
<th>Management</th>
<th>Maintenance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Public sector</td>
<td>36.9%</td>
<td>29.9%</td>
<td>49.6%</td>
<td>34.4%</td>
</tr>
<tr>
<td>Private sector</td>
<td>49.2%</td>
<td>56.8%</td>
<td>27.4%</td>
<td>49.0%</td>
</tr>
<tr>
<td>Third sector</td>
<td>13.9%</td>
<td>13.3%</td>
<td>23.0%</td>
<td>16.6%</td>
</tr>
</tbody>
</table>

**Figure 8: Percentage of green space organisations by role**

<table>
<thead>
<tr>
<th>Role</th>
<th>Planning</th>
<th>Design</th>
<th>Manager</th>
<th>Maintenance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Public</td>
<td>19.9%</td>
<td>23.5%</td>
<td>25.6%</td>
<td>31.0%</td>
</tr>
<tr>
<td>Private</td>
<td>24.0%</td>
<td>26.8%</td>
<td>27.4%</td>
<td>21.5%</td>
</tr>
<tr>
<td>Third</td>
<td>23.0%</td>
<td>25.5%</td>
<td>25.6%</td>
<td>25.8%</td>
</tr>
</tbody>
</table>
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

<table>
<thead>
<tr>
<th></th>
<th>All green space organisations</th>
<th>Public sector</th>
<th>Private sector</th>
<th>Third sector</th>
</tr>
</thead>
<tbody>
<tr>
<td>Work contracted out</td>
<td>55.5%</td>
<td>56.8%</td>
<td>12.8%</td>
<td>69.8%</td>
</tr>
<tr>
<td>Work not contracted out</td>
<td>44.5%</td>
<td>43.2%</td>
<td>87.2%</td>
<td>30.2%</td>
</tr>
</tbody>
</table>

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.

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

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

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

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Land owner</td>
<td>75.6%</td>
</tr>
<tr>
<td>Land manager</td>
<td>77.2%</td>
</tr>
<tr>
<td>Contractor</td>
<td>38.4%</td>
</tr>
<tr>
<td>Consultant</td>
<td>49.7%</td>
</tr>
</tbody>
</table>
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).

![Figure 11: Training methods used in the last 12 months by green space organisation type](image-url)

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

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

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

<table>
<thead>
<tr>
<th>Response</th>
<th>All</th>
<th>Public sector</th>
<th>Private sector</th>
<th>Third sector</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td>56.6%</td>
<td>69.9%</td>
<td>49.0%</td>
<td>56.1%</td>
</tr>
<tr>
<td>No</td>
<td>42.5%</td>
<td>29.2%</td>
<td>50.0%</td>
<td>43.9%</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Response</th>
<th>All</th>
<th>Public sector</th>
<th>Private sector</th>
<th>Third sector</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td>19.2%</td>
<td>25.8%</td>
<td>14.8%</td>
<td>20.9%</td>
</tr>
<tr>
<td>No</td>
<td>80.8%</td>
<td>74.2%</td>
<td>85.2%</td>
<td>79.1%</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th></th>
<th>All</th>
<th>Public sector</th>
<th>Private sector</th>
<th>Third sector</th>
</tr>
</thead>
<tbody>
<tr>
<td>Average number of apprentices</td>
<td>3.1</td>
<td>4.1</td>
<td>2.6</td>
<td>1.7</td>
</tr>
<tr>
<td>Organisations reporting</td>
<td>159</td>
<td>69</td>
<td>69</td>
<td>21</td>
</tr>
<tr>
<td>Margin of error</td>
<td>2.4-3.8</td>
<td>3.0-5.2</td>
<td>1.4-3.8</td>
<td>1.1-2.4</td>
</tr>
</tbody>
</table>

### 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

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

* Source: Labour force survey, Q3 - 2009
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 24: Qualifications held by employees by green space organisation role

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

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

<table>
<thead>
<tr>
<th>Response</th>
<th>All green space sector</th>
<th>Public sector</th>
<th>Private sector</th>
<th>Third sector</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td>26.5%</td>
<td>42.8%</td>
<td>18.6%</td>
<td>20.3%</td>
</tr>
<tr>
<td>No</td>
<td>73.5%</td>
<td>57.2%</td>
<td>81.4%</td>
<td>79.7%</td>
</tr>
</tbody>
</table>
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>
<thead>
<tr>
<th>Job role</th>
<th>All sector</th>
<th>Public sector</th>
<th>Private sector</th>
<th>Third sector</th>
</tr>
</thead>
<tbody>
<tr>
<td>Landscape architect</td>
<td>14.9%</td>
<td>8.5%</td>
<td>22.5%</td>
<td>8.2%</td>
</tr>
<tr>
<td>Horticulturalist</td>
<td>13.7%</td>
<td>16.4%</td>
<td>9.9%</td>
<td>18.0%</td>
</tr>
<tr>
<td>Gardener</td>
<td>12.0%</td>
<td>10.3%</td>
<td>11.5%</td>
<td>18.0%</td>
</tr>
<tr>
<td>Greenkeeper/groundsman</td>
<td>11.5%</td>
<td>11.5%</td>
<td>11.0%</td>
<td>13.1%</td>
</tr>
<tr>
<td>Tree surgeon</td>
<td>10.3%</td>
<td>8.5%</td>
<td>12.0%</td>
<td>9.8%</td>
</tr>
<tr>
<td>Arboriculturalist</td>
<td>9.4%</td>
<td>9.7%</td>
<td>8.4%</td>
<td>11.5%</td>
</tr>
<tr>
<td>Parks ranger/warden</td>
<td>5.8%</td>
<td>10.3%</td>
<td>3.1%</td>
<td>1.6%</td>
</tr>
<tr>
<td>Ecologist (includes conservation/biodiversity roles)</td>
<td>5.5%</td>
<td>4.2%</td>
<td>6.8%</td>
<td>4.9%</td>
</tr>
<tr>
<td>Countryside ranger/warden</td>
<td>5.5%</td>
<td>9.1%</td>
<td>3.1%</td>
<td>3.3%</td>
</tr>
<tr>
<td>Landscape/parks manager</td>
<td>5.3%</td>
<td>6.1%</td>
<td>4.7%</td>
<td>4.9%</td>
</tr>
<tr>
<td>Landscape planner</td>
<td>3.4%</td>
<td>3.6%</td>
<td>3.7%</td>
<td>1.6%</td>
</tr>
<tr>
<td>Allotments officer</td>
<td>2.9%</td>
<td>1.8%</td>
<td>3.1%</td>
<td>4.9%</td>
</tr>
</tbody>
</table>

**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

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

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

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

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

![Figure 15: Skills scoring - green space sector](image)

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

Table 30: Priority skills: public sector green space

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

Table 31: Priority skills: private sector green space

<table>
<thead>
<tr>
<th>#</th>
<th>Skill</th>
<th>Future importance</th>
<th>Current skills score</th>
</tr>
</thead>
<tbody>
<tr>
<td>7</td>
<td>Involving volunteers</td>
<td>2.47</td>
<td>6.93</td>
</tr>
<tr>
<td>5</td>
<td>Marketing and promoting sites</td>
<td>2.49</td>
<td>7.16</td>
</tr>
<tr>
<td>3</td>
<td>Planning for sustainability and climate change</td>
<td>2.57</td>
<td>7.30</td>
</tr>
<tr>
<td>19</td>
<td>IT professional skills</td>
<td>2.49</td>
<td>7.35</td>
</tr>
<tr>
<td>17</td>
<td>Design/managing for sustainability and climate change</td>
<td>2.53</td>
<td>7.37</td>
</tr>
<tr>
<td>9</td>
<td>Engaging with the public about green space matters</td>
<td>2.49</td>
<td>7.42</td>
</tr>
<tr>
<td>28</td>
<td>Managing pests and diseases</td>
<td>2.51</td>
<td>7.89</td>
</tr>
<tr>
<td>24</td>
<td>Propagating plants</td>
<td>2.52</td>
<td>7.92</td>
</tr>
</tbody>
</table>
Figure 18: Third sector skills scores

Table 32: Priority skills: third sector green space

<table>
<thead>
<tr>
<th></th>
<th>Future importance</th>
<th>Current skills score</th>
</tr>
</thead>
<tbody>
<tr>
<td>3</td>
<td>Planning for sustainability and climate change</td>
<td>2.61</td>
</tr>
<tr>
<td>19</td>
<td>IT professional skills</td>
<td>2.52</td>
</tr>
<tr>
<td>5</td>
<td>Marketing and promoting sites</td>
<td>2.48</td>
</tr>
<tr>
<td>13</td>
<td>Co-ordinating data collection</td>
<td>2.42</td>
</tr>
<tr>
<td>17</td>
<td>Design/managing for sustainability and climate change</td>
<td>2.55</td>
</tr>
<tr>
<td>2</td>
<td>Planning strategies and policies</td>
<td>2.43</td>
</tr>
<tr>
<td>25</td>
<td>Sustaining plant development</td>
<td>2.44</td>
</tr>
<tr>
<td>1</td>
<td>Planning the improvement of sites</td>
<td>2.43</td>
</tr>
<tr>
<td>18</td>
<td>Networking</td>
<td>2.46</td>
</tr>
<tr>
<td>12</td>
<td>Creating designs which are fit for purpose</td>
<td>2.43</td>
</tr>
</tbody>
</table>
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)

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

<table>
<thead>
<tr>
<th>Response</th>
<th>All green space organisations</th>
<th>Urban LAs</th>
<th>Non-urban LAs</th>
<th>RSLs</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td>56.6%</td>
<td>81.2%</td>
<td>66.0%</td>
<td>30.0%</td>
</tr>
<tr>
<td>No</td>
<td>42.5%</td>
<td>18.8%</td>
<td>33.0%</td>
<td>70.0%</td>
</tr>
</tbody>
</table>

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)

<table>
<thead>
<tr>
<th>Response</th>
<th>All green space organisations</th>
<th>Urban LAs</th>
<th>Non-urban LAs</th>
<th>RSLs</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td>19.1%</td>
<td>33.8%</td>
<td>21.8%</td>
<td>13.3%</td>
</tr>
<tr>
<td>No</td>
<td>80.9%</td>
<td>66.2%</td>
<td>78.2%</td>
<td>86.7%</td>
</tr>
</tbody>
</table>

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)

<table>
<thead>
<tr>
<th>Response</th>
<th>All green space organisations</th>
<th>Urban LAs</th>
<th>Non-urban LAs</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td>26.5%</td>
<td>44.9%</td>
<td>41.6%</td>
</tr>
<tr>
<td>No</td>
<td>73.5%</td>
<td>55.1%</td>
<td>58.4%</td>
</tr>
</tbody>
</table>
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)

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

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)

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

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

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).
Table 40: Priority skills (urban LAs)

<table>
<thead>
<tr>
<th>Priority skills</th>
<th>Future importance</th>
<th>Current skills score</th>
</tr>
</thead>
<tbody>
<tr>
<td>5 Marketing and promoting sites</td>
<td>2.40</td>
<td>6.48</td>
</tr>
<tr>
<td>13 Co-ordinating data collection</td>
<td>2.46</td>
<td>6.50</td>
</tr>
<tr>
<td>25 Sustaining plant development</td>
<td>2.41</td>
<td>6.55</td>
</tr>
<tr>
<td>17 Design/managing for sustainability and climate change</td>
<td>2.49</td>
<td>6.73</td>
</tr>
<tr>
<td>19 IT professional skills</td>
<td>2.42</td>
<td>6.84</td>
</tr>
<tr>
<td>22 Maintaining the health and condition of turf</td>
<td>2.45</td>
<td>6.93</td>
</tr>
<tr>
<td>18 Networking</td>
<td>2.56</td>
<td>7.10</td>
</tr>
<tr>
<td>26 Understanding plant growth cycles</td>
<td>2.41</td>
<td>7.24</td>
</tr>
<tr>
<td>12 Creating designs which are fit for purpose</td>
<td>2.43</td>
<td>7.28</td>
</tr>
<tr>
<td>29 Maintaining woodlands</td>
<td>2.41</td>
<td>7.29</td>
</tr>
</tbody>
</table>
Figure 20: Skills scores (RSLs)

Table 41: Priority skills (RSLs)

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

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

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

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

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

<table>
<thead>
<tr>
<th>Sector</th>
<th>Green space sector</th>
<th>Arts entertainment and recreation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Private</td>
<td>42.9%</td>
<td>76.4%</td>
</tr>
<tr>
<td>Public</td>
<td>57.1%</td>
<td>23.6%</td>
</tr>
<tr>
<td>Total</td>
<td>100%</td>
<td>100%</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Gender</th>
<th>Green space sector</th>
<th>Agriculture forestry and fishing</th>
<th>Arts entertainment and recreation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Male</td>
<td>71.0%</td>
<td>75.8%</td>
<td>53.6%</td>
</tr>
<tr>
<td>Female</td>
<td>29.0%</td>
<td>24.2%</td>
<td>46.4%</td>
</tr>
<tr>
<td>Total</td>
<td>100%</td>
<td>100%</td>
<td>100%</td>
</tr>
</tbody>
</table>

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

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

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

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

* 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>
<thead>
<tr>
<th>Qualification level</th>
<th>Green space sector</th>
<th>Agriculture forestry and fishing</th>
<th>Arts entertainment and recreation</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>44.3%</td>
<td>18.3%</td>
<td>36.8%</td>
</tr>
<tr>
<td>Level 4 (degree and equivalent and above)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Level 3 (A level equivalent)</td>
<td>21.0%</td>
<td>14.4%</td>
<td>17.6%</td>
</tr>
<tr>
<td>Trade apprenticeship</td>
<td>6.1%</td>
<td></td>
<td>3.7%</td>
</tr>
<tr>
<td>Level 2 (GCSE A-C equivalent)</td>
<td>24.3%</td>
<td>16.5%</td>
<td>20.7%</td>
</tr>
<tr>
<td>Below level 2</td>
<td>5.8%</td>
<td>14.4%</td>
<td>10.0%</td>
</tr>
<tr>
<td>Other qualifications</td>
<td></td>
<td>14.1%</td>
<td>5.3%</td>
</tr>
<tr>
<td>No qualifications</td>
<td>4.7%</td>
<td>16.3%</td>
<td>5.9%</td>
</tr>
<tr>
<td>Total</td>
<td>100%</td>
<td>100%</td>
<td>100%</td>
</tr>
</tbody>
</table>

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>
<thead>
<tr>
<th>SSC</th>
<th>Training spend per employee (£)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lantra</td>
<td>2,975</td>
</tr>
<tr>
<td>ConstructionSkills</td>
<td>2,750</td>
</tr>
<tr>
<td>Asset Skills</td>
<td>2,500</td>
</tr>
<tr>
<td>Creative and Cultural Skills</td>
<td>1,700</td>
</tr>
<tr>
<td>Green space sector</td>
<td>690*</td>
</tr>
</tbody>
</table>

* 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.

Table 50: Skills gaps by SSC sector

<table>
<thead>
<tr>
<th>Asset Skills</th>
<th>% Lantra</th>
<th>% Construction skills</th>
<th>% Creative and cultural skills</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Technical and practical</td>
<td>50%</td>
<td>52%</td>
<td>61%</td>
</tr>
<tr>
<td>2 Customer handling</td>
<td>46%</td>
<td>33%</td>
<td>34%</td>
</tr>
<tr>
<td>3 Oral communication</td>
<td>45%</td>
<td>26%</td>
<td>31%</td>
</tr>
<tr>
<td>4 Teamworking</td>
<td>41%</td>
<td>23%</td>
<td>31%</td>
</tr>
<tr>
<td>5 Problem solving</td>
<td>41%</td>
<td>21%</td>
<td>26%</td>
</tr>
<tr>
<td>6 Written communication</td>
<td>39%</td>
<td>17%</td>
<td>26%</td>
</tr>
<tr>
<td>7 Management</td>
<td>38%</td>
<td>15%</td>
<td>25%</td>
</tr>
<tr>
<td>8 Literacy</td>
<td>32%</td>
<td>13%</td>
<td>19%</td>
</tr>
<tr>
<td>9 IT user skills</td>
<td>26%</td>
<td>13%</td>
<td>17%</td>
</tr>
<tr>
<td>10 Office admin</td>
<td>23%</td>
<td>13%</td>
<td>15%</td>
</tr>
</tbody>
</table>

Source: Learning and Skills Council National Employer Skills Survey 2007

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 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

<table>
<thead>
<tr>
<th>Sector organisations</th>
<th>% offering work experience</th>
</tr>
</thead>
<tbody>
<tr>
<td>Government and public sector</td>
<td>89%</td>
</tr>
<tr>
<td>Telecommunications and IT</td>
<td>77%</td>
</tr>
<tr>
<td>Financial services</td>
<td>68%</td>
</tr>
<tr>
<td>Healthcare and education</td>
<td>68%</td>
</tr>
<tr>
<td>Manufacturing</td>
<td>68%</td>
</tr>
<tr>
<td>Construction</td>
<td>65%</td>
</tr>
<tr>
<td>Leisure</td>
<td>62%</td>
</tr>
<tr>
<td>Retail</td>
<td>60%</td>
</tr>
<tr>
<td>Green space sector</td>
<td>57%*</td>
</tr>
<tr>
<td>Professional services</td>
<td>55%</td>
</tr>
<tr>
<td>Publishing &amp; media</td>
<td>38%</td>
</tr>
</tbody>
</table>

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

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

<table>
<thead>
<tr>
<th>SSC</th>
<th>% offering apprenticeships</th>
</tr>
</thead>
<tbody>
<tr>
<td>ConstructionSkills</td>
<td>19%</td>
</tr>
<tr>
<td>Green space sector</td>
<td>19%*</td>
</tr>
<tr>
<td>Lantra</td>
<td>9%</td>
</tr>
<tr>
<td>Asset Skills</td>
<td>8%</td>
</tr>
<tr>
<td>Creative and Cultural Skills</td>
<td>6%</td>
</tr>
</tbody>
</table>


* 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 recession; 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

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

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

<table>
<thead>
<tr>
<th>Impact</th>
<th>All green space organisations</th>
<th>Public sector</th>
<th>Private sector</th>
<th>Third sector</th>
</tr>
</thead>
<tbody>
<tr>
<td>Increase in redundancies</td>
<td>14.6%</td>
<td>15.0%</td>
<td>14.7%</td>
<td>12.7%</td>
</tr>
<tr>
<td>Decrease in recruitment</td>
<td>24.6%</td>
<td>25.0%</td>
<td>24.3%</td>
<td>24.6%</td>
</tr>
<tr>
<td>Decrease in staff training</td>
<td>13.4%</td>
<td>12.6%</td>
<td>14.6%</td>
<td>11.4%</td>
</tr>
<tr>
<td>Reduced amount of public space contracts</td>
<td>16.1%</td>
<td>5.5%</td>
<td>26.6%</td>
<td>7.5%</td>
</tr>
<tr>
<td>Increase in recruitment of volunteers</td>
<td>7.7%</td>
<td>12.3%</td>
<td>2.3%</td>
<td>15.4%</td>
</tr>
<tr>
<td>Improved quality of candidates available for positions</td>
<td>14.3%</td>
<td>9.8%</td>
<td>15.5%</td>
<td>24.1%</td>
</tr>
</tbody>
</table>

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

- Improved quality of candidates available for positions
- Increase in recruitment of volunteers
- Reduced amount of public space contracts
- Decrease in staff training
- Decrease in recruitment
- Increase in redundancies
5.3 The seven priorities

The CABE 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: CABE 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

<table>
<thead>
<tr>
<th>Priorities</th>
<th>All green space organisations</th>
<th>Public sector</th>
<th>Private sector</th>
<th>Third sector</th>
</tr>
</thead>
<tbody>
<tr>
<td>Increase awareness of the sector and the opportunities it offers, to encourage more people into the sector</td>
<td>48.8%</td>
<td>42.1%</td>
<td>51.5%</td>
<td>54.3%</td>
</tr>
<tr>
<td>Increase and improve entry routes and career paths in the sector</td>
<td>35.3%</td>
<td>31.2%</td>
<td>37.5%</td>
<td>36.4%</td>
</tr>
<tr>
<td>Improve the availability and quality of training, including continual professional development</td>
<td>51.3%</td>
<td>43.3%</td>
<td>54.1%</td>
<td>58.6%</td>
</tr>
<tr>
<td>Improve management and leadership skills</td>
<td>35.7%</td>
<td>40.8%</td>
<td>32.3%</td>
<td>37.1%</td>
</tr>
<tr>
<td>Increase the sector’s investment in skills</td>
<td>36.9%</td>
<td>38.6%</td>
<td>36.0%</td>
<td>36.4%</td>
</tr>
<tr>
<td>Build capacity for co-ordinated working across different parts of the sector</td>
<td>29.6%</td>
<td>33.0%</td>
<td>28.0%</td>
<td>27.9%</td>
</tr>
<tr>
<td>Develop and maintain a strong evidence base to make the case for investment in green space skills</td>
<td>53.7%</td>
<td>64.2%</td>
<td>49.4%</td>
<td>45.7%</td>
</tr>
</tbody>
</table>
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. Lantra 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 B3.4. 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 ONS.

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.
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.

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

<table>
<thead>
<tr>
<th>List</th>
<th>Contacts held</th>
<th>% public sector</th>
<th>% private sector</th>
<th>% third sector</th>
<th>Response aim</th>
<th>Quota</th>
</tr>
</thead>
<tbody>
<tr>
<td>Local authority heads of parks</td>
<td>360</td>
<td>100%</td>
<td>0%</td>
<td>0%</td>
<td>250</td>
<td>250 public sector</td>
</tr>
<tr>
<td>Mixed: private/third/government organisations</td>
<td>307</td>
<td>32%</td>
<td>45%</td>
<td>23%</td>
<td>50</td>
<td>15 public sector 25 private sector 10 third sector</td>
</tr>
<tr>
<td>Landscape practices</td>
<td>516</td>
<td>0%</td>
<td>100%</td>
<td>0%</td>
<td>50</td>
<td>50 private sector</td>
</tr>
<tr>
<td>Natural England recommendations</td>
<td>15</td>
<td>75%</td>
<td>0%</td>
<td>25%</td>
<td>10</td>
<td>7 public sector 3 third sector</td>
</tr>
<tr>
<td>Cemeteries</td>
<td>76</td>
<td>72%</td>
<td>4%</td>
<td>24%</td>
<td>30</td>
<td>20 public sector 3 private sector 7 third sector</td>
</tr>
<tr>
<td>Registered social landlords</td>
<td>400</td>
<td>0%</td>
<td>0%</td>
<td>100%</td>
<td>200</td>
<td>200 third sector</td>
</tr>
<tr>
<td>Groundwork officers</td>
<td>30</td>
<td>0%</td>
<td>0%</td>
<td>100%</td>
<td>10</td>
<td>10 third sector</td>
</tr>
<tr>
<td>BALI directory</td>
<td>450</td>
<td>0%</td>
<td>100%</td>
<td>0%</td>
<td>50</td>
<td>50 private sector</td>
</tr>
<tr>
<td>SIC 014110 (list one part one)</td>
<td>1,150</td>
<td>0%</td>
<td>100%</td>
<td>0%</td>
<td>250</td>
<td>250 private sector</td>
</tr>
<tr>
<td>SIC 0141 (list one part two)</td>
<td>1,150</td>
<td>0%</td>
<td>100%</td>
<td>0%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>SIC 0141 (list two)</td>
<td>1,656</td>
<td>0%</td>
<td>100%</td>
<td>0%</td>
<td>100</td>
<td>55 public sector 25 private sector 20 third sector</td>
</tr>
<tr>
<td>SIC 925311</td>
<td>386</td>
<td>56%</td>
<td>26%</td>
<td>18%</td>
<td>100</td>
<td>347 public sector 403 private sector 250 third sector</td>
</tr>
<tr>
<td>Total</td>
<td>6,496</td>
<td></td>
<td></td>
<td></td>
<td>1,000</td>
<td></td>
</tr>
</tbody>
</table>
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.

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 codes

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 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.

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
- 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.
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
- Trail 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
- To 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
- Websitess - 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 arboricultural 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:

<table>
<thead>
<tr>
<th>Age Range</th>
<th>___%</th>
</tr>
</thead>
<tbody>
<tr>
<td>16-24</td>
<td></td>
</tr>
<tr>
<td>25-39</td>
<td></td>
</tr>
<tr>
<td>40-59</td>
<td></td>
</tr>
<tr>
<td>60-64</td>
<td></td>
</tr>
<tr>
<td>65+</td>
<td></td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Ethnic Group</th>
<th>___%</th>
</tr>
</thead>
<tbody>
<tr>
<td>White</td>
<td></td>
</tr>
<tr>
<td>Mixed</td>
<td></td>
</tr>
<tr>
<td>Asian or Asian Brit</td>
<td></td>
</tr>
<tr>
<td>Black or Black Brit</td>
<td></td>
</tr>
<tr>
<td>Chinese</td>
<td></td>
</tr>
<tr>
<td>Other ethnic group</td>
<td></td>
</tr>
</tbody>
</table>

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:

<table>
<thead>
<tr>
<th>Level</th>
<th>___%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Level 4 and above (degree equiv)</td>
<td></td>
</tr>
<tr>
<td>Level 3 (A-level equiv)</td>
<td></td>
</tr>
<tr>
<td>Level 2 (GCSE A-C equiv)</td>
<td></td>
</tr>
<tr>
<td>Level 1 (GCSE D-G equiv)</td>
<td></td>
</tr>
<tr>
<td>No qualifications held</td>
<td></td>
</tr>
</tbody>
</table>

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

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

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

- Other roles might include Fundraiser/Event Organiser

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.
<table>
<thead>
<tr>
<th>On a scale of 1 to 10, how would you rate the skill level of your staff?</th>
<th>In the future, will this skill be less important, the same, or more important?</th>
<th>Do you buy in this skill externally?</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 = unskilled</td>
<td>10 = perfectly skilled</td>
<td>Less</td>
</tr>
</tbody>
</table>

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
- 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

<table>
<thead>
<tr>
<th>Basic maintenance of planted areas</th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Handling plant material properly</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Using tools and equipment properly</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Customer handling and dealing with the public</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Team-working</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Oral Communication</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other (note the category, skill and scores)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Specify:</td>
<td></td>
<td></td>
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<td>Specify:</td>
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<td></td>
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<tr>
<td>Specify:</td>
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</tbody>
</table>

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.