**Landscape Institute**
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Charity registered in England and Wales Number 1073396
Charity registered in Scotland number SC047057

# Joint Board & Council Strategy Session

## Agenda

Date: 22 November 2023. Time: 0930-1630
Venue: Digital via Zoom

| | |
|---|---|
| **Chair:** | Carolin Göhler (President Elect / Acting as President) |
| **In attendance:** | Members of the Board of Trustees<br>Members of Advisory Council<br>Rob Hughes, Interim Chief Executive Officer<br>Rachel Wallace, LI Project Manager<br>Jackie Sharp, Interim Head of Policy & Technical<br>John O'Keefe, Head of Education and Careers<br>Naomi Taylor, Head of Membership Services |
| **Guest/s:** | Dark Horse, Wordsmiths |

| Item No. | Business | Purpose | Activity | Sponsor | Time |
|---|---|---|---|---|---|
| **1** | **Open Session – Preliminary Matters (09.30:10.45, 55min)** | | | | |
| 1.1 | Welcome, Apologies and Quoracy | Chair to welcome members of Board and Council to the meeting. | Verbal | Carolin | 09.30 (3min) |
| **2.** | **Advisory Council Matters** | | | | |
| 2.1 | Declarations of interest | To request and record any notifications of declarations of interest | Verbal | Carolin | 09.33 (2min) |
| 2.2 | Governance | i. Appointments & Selection Cttee (A&SC) membership<br>ii. Associate Rep Recruitment<br>iii. AGM 2023 Annual General Meeting (AGM) 2023<br>iv. Other post Board activity | Discussion | Rob | 09.35 (30min) |
| 2.3 | Standing Committee Review Task & Finish Group | Introduction to the group and purpose | Introduction | Deborah | 10.05 (20min) |
| 2.4 | LI 'Manifesto' (Policy & Communications Committee PCC) | Introduction and to request engagement | PAPERS (to follow)<br>1. LI Draft Manifesto<br>2. Supporting paper | Ian / Alan | 10.25 (20min) |
| **Break (10.45-11.00, 15min)** | | | | | |
| **3.** | **Session 1 – Green Skills Agenda (11.00 min)** | | | | |
| 3.1 | Green Skills Report | Green Skills summary | Introduction<br>1. Skills for Greener Places Report | Jackie | 11.00 (15min) |
| 3.2 | Green Skills Report | Discussion on Green Skills report | Breakout group no 1 | Facilitators: Jackie/John/ Naomi/ Rachel/ Rob | 11.15 (30min) |
| **Break (11.45:12.00, 15min)** | | | | | |

| | | | | | |
|---|---|---|---|---|---|
| 3.2 | Green Skills Report | Discussion on Green Skills report | Breakout group no 1 | Facilitators: Jackie/John/ Naomi/ Rachel/ Rob | 12.00 (30min) |
| 3.4 | Green Skills Report | Wash up summary and next steps | Wash Up | Jackie | 12.30 (15min) |
| **Lunch (12.45:13.45, 60 mins)** | | | | | |
| **4** | **Session 2 Brand Identity review (13.45-16.00)** | | | | |
| 4.1 | Brand Identity pt1 | Brand identity introduction and purpose | Intro | Neelam | 13:45 (10min) |
| 4.2 | Brand Identity pt2 | Data gathering for LI brand identity | Workshop | Dark Horse/ Wordsmiths/ Neelam | 13.55 (45min) |
| **Break (14.40: 14.50 10 mins)** | | | | | |
| 4.3 | Brand Identity pt3 | Data gathering for LI brand identity | Workshop | Dark Horse/ Wordsmiths/ Neelam | 14.50 (70min) |
| **5** | **Summary and Close (16.00- 16.30 30mins)** | | | | |
| 5.1 | Summary | Summary and next steps | Verbal | Rob | 16.00 (15min) |
| 5.2 | Close | Chair to close the session | Verbal | Carolin | 16.15 (15min) |

# Skills for Greener Places

## A review of the UK's landscape workforce

**December 2022**

Metro Dynamics

Landscape Institute
Inspiring great places

**Preparing for a Greener Future was supported by:**

## Acknowledgements

Many thanks to the Landscape Institute team and members of the Steering Group for providing oversight and feedback throughout the delivery of this study.

The members of the steering group were:

- Wayne Grills, Katharine Hughes and Olivia McCullough; British Association of Landscape Industries
- Liam McQuillan and Rory McNeary; the NI Department for Communities
- Gary Charlton and Chris Bolton; Natural England
- John Briggs and Jill Bullen; Natural Resources Wales
- Laura Campbell, NatureScot
- Sarah Franklin; Historic Environment Scotland
- Jenifer White, Sophie Norton; Historic England
- Carl Madden-Thomas; Locri recruitment

The research was led at the Landscape Institute by Ben Brown, with Lucy Pickford and the LI policy team, and at Metro Dynamics by Fiona Tuck, with Callum Murfet and James Gilmour.

Thank you also to those who took the time to speak to us about the Landscape Industry, and provided us with some invaluable insights into your field: Adrian Wikeley, Alison Galbraith, Caroline Cotterell, Christoph Brintrup, Darren Share, Debbie Ward, Emma Sharpe, Graham Duxbury, Ian Hingley, Jon Best, Lee Heykoop, Louise Clark, Phil Askew, Phil Sullivan, Robert Mayhew, Ruairidh Jackson, Saira Ali, Sarah Bryan, Sarah Greenwood, Sarah Kelly and Simon Ward

Finally, thank you to the 1,537 people who completed our survey and provided the data underpinning this work. The 333.4 hours you spent between you is highly appreciated.

### About the Landscape Institute

The LI's aim, through the work of its members is to protect, conserve and enhance the natural and built environment for the public benefit. It provides a professional home for all landscape practitioners including landscape planners, landscape architects, landscape managers and urban designers.

To learn more about this research, or to get involved in the Institute's work, contact the team at **policy@landscapeinstitute.org**

**landscapeinstitute.org**

**@talklandscape**

Front cover image: Alfred Place Gardens, London © LDA Design



# Contents


Crowthorne - Buckler's Park and Forest © Macgregor Smith

# Executive Summary

This study was commissioned to better understand the current shape and status of the UK's landscape workforce and inform its future development, in line with drivers of demand in the sector. It has sought to answer the question:

**Does the UK have the skills and workforce it needs, to achieve its ambitions for people, place, and nature?** To tackle climate change in places, to raise biodiversity, to build healthy, prosperous towns and cities – the UK will need a landscape labour market that is fit for the task. This research shows the scale of that challenge.

The aim is that this report will be one of a series of studies over time, which will enable us to better track change across the sector and develop our understanding of future workforce needs so that we are equipped to respond to them.

## The policy challenge

How we use our land is at the centre of many current global issues: energy security, climate adaptation, nature recovery, housing, economic development, food security. At whatever scale, all require land.

This means that in addition to traditional business drivers, such as competitive recruitment market and rapid digitisation, the landscape sector is driven by a complex and critical array of policy agendas – for instance:

- Climate change mitigation and climate adaptation currently dominate discussions of both present and future expectations of work, for many, this is 'the only game in town'.
- Biodiversity improvements and nature recovery/restoration, and the new biodiversity net-gain requirements, are prominent drivers, bringing welcome focus and prioritisation but also challenges in implementation, particularly in the context of high demand for development and a national housing shortage.
- The Covid-19 pandemic and the corresponding shift to hybrid work has led to a substantial rethink about the use of public space, access to green space and the importance of place-making for health and wellbeing.
- Driving forward the levelling-up agenda, government investment in cities and towns alongside major infrastructure schemes generate substantial work and attract substantial resources in the sector.

Societal preferences are also shifting, further reflected in development proposals; active travel, walkability and active engagement with landscape are all increasingly popular.

**Work to address these policy priorities all impacts the character and the quality of land and the way people experience and perceive it. The landscape sector and the skills, knowledge and experience of its workforce is therefore in greater demand than ever before. This research asks whether the UK has the supply to meet that demand.**

The challenge of both needing new green skills, combined with understanding what those skills might look like, is a global-scale challenge. But, if the UK can tackle this issue, the opportunity and potential payoff is huge.

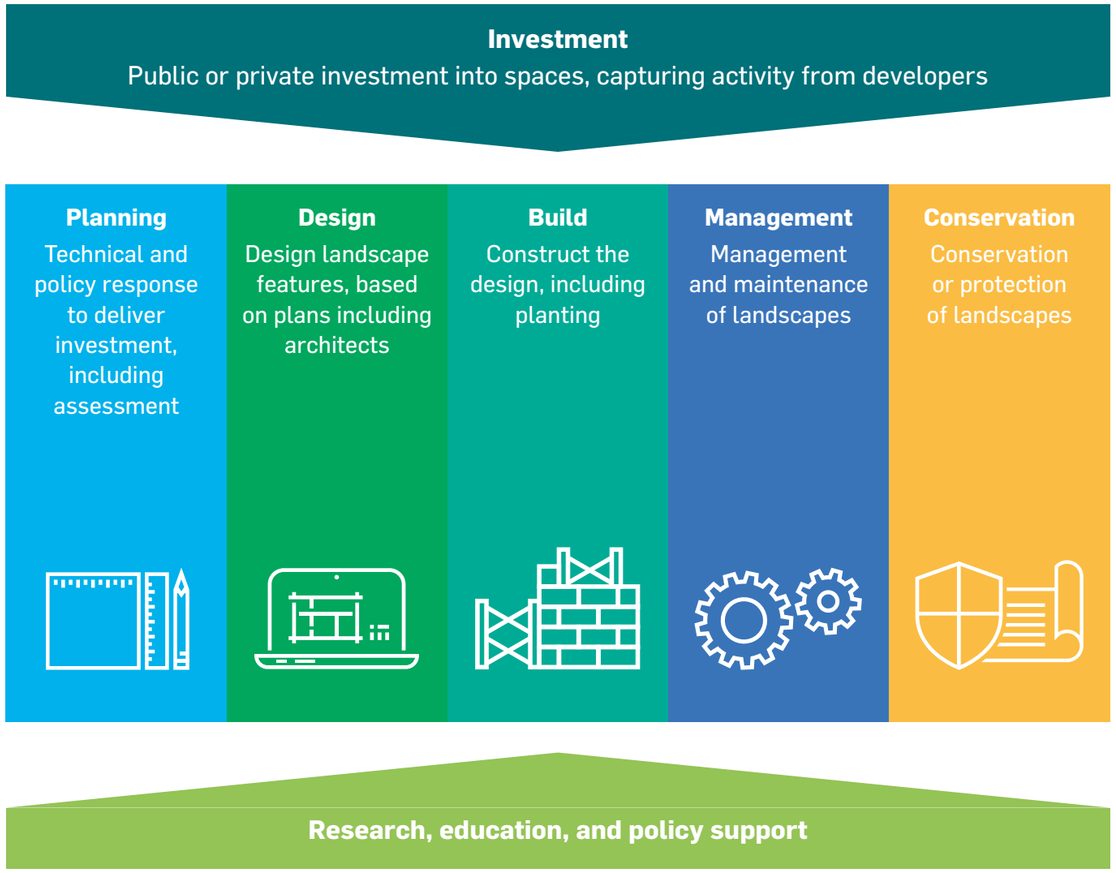
## Defining landscape

The broad understanding of what landscape is, means that defining it for measurement is not straightforward. Landscape is not easily identified within the Standard Industrial Classifications (SIC) and Standard Occupation Classification (SOC) structures that are usually used for economic analysis. Previous studies have tended to rely on surveys alone and have focussed on more narrow professional categories, such as chartered landscape architects. To underpin the opportunity for more straightforward future updates, and to encapsulate the broader range of activities in landscape, this study has developed a 'best fit' definition for the wider landscape economy, using the SIC/SOC structures.

This definition is illustrated below, where the core landscape sector encompasses the planning, design, build, management, and conservation of spaces. These activities are critically linked to investment and research, education, and policy.

This means that, for the first time, we can observe the broad sweep of landscape activities as one coherent landscape economy, and how the component professions and activities fit and work together to create value.

**Figure 1** *Landscape Sector Value Chain*




**Landscape**
The landscape sector is composed of five main elements. Landscape professionals and business often cut across all of these in their day-to-day activities.

Using these definitions, the study has collated and analysed secondary data from the Office for National Statistics (ONS) to estimate the economic size of the sector including jobs, businesses, GVA and earnings. However, ONS data will always have limitations driven by the classification systems, particularly on specificity of activity and geographical detail. As such, a survey of approx. 1,500 practitioners was also carried out, alongside a series of one-to-one interviews with key stakeholders across the sector to provide further insights.

# Landscape in numbers

This important research helps us to set out what the landscape sector looks like currently – who works there, who doesn't; what work they're doing, what work they might need to do in the future.

**333,900**
**jobs**

**49,300**
**businesses**

**£24.6bn**
**of GVA**



### Landscape headlines:

- Landscape employs 333,900 people, 1.1% of the total workforce, and is growing at a faster rate than the wider economy average: increasing by 18% from 2010, compared to a 10% across all industries.
- Gross Value Added (GVA) makes a marginally higher contribution at 1.4%. This reflects landscape's higher productivity, with GVA per job of £74,300 compared to the national average of £58,300.
- The average salary of workers is £29,700, just above the national average of £26,036.
- The workforce tends to be concentrated in the south, where London (56,600 jobs), Southeast (53,400) and East of England (35,300), make up 44% of the GB total.
- The largest landscape sub-sector is 'Build', with 102k people, followed by design (79k), conservation (62k), planning (48k), management (27k) and research (10k).

### Landscape businesses:

- Whilst some large organisations operate in the sector, the majority are very small with 94% employing less than 10 people. Over a third of businesses produce annual turnover of below £100k.
- For almost half of the landscape businesses, developers are the primary client, making them a dominant influence on trends in the sector and the type of work done.
- Businesses are generally positive in their outlook, with few identifying acute challenges. Digitalisation and procurement were the most pressing concerns, followed by access to materials and workforce retention/skills.

### Landscape workforce:

- The workforce is predominately white and relatively older, compared to national averages. It is also male dominated, with stark gender wage disparities.
- Large numbers of workers are highly skilled, meaning than on average 60% attain a higher education or degree equivalent, compared to 45% economy wide. This varies significantly between the elements of the sector that are more technical and those that are more physically labour intensive.
- Skills and training are pressing issues for the sector; half of businesses surveyed had hard to fill vacancies and three quarters of employees intend to undertake training over the next 12 months.

## Positioning landscape to respond

There is general assent in the sector that this is a moment of opportunity for landscape. The research has identified this sector as a significant one for the national economy, with a pivotal role to play in delivering against critical policy agendas. The definition of placemaking, green infrastructure, nature-based solutions, and related landscape terms are in flux and still not settled, but they are terms of increasing currency and there is growing momentum for a landscape-led approach.

The landscape discipline's generational shift from aesthetic to multi-functional, the rising salience of landscape in public realm, and the potential positioning of landscape at the centre of a coalition of allied disciplines offer an opportunity for the discipline to emerge as a leader in the field. However, there are challenges to be overcome:

- The lack of a single voice and traditional connotations of landscape equating to beauty make it challenging for the sector to communicate a clear mainstream idea of what landscape means and looks like as a profession.
- There is limited collaboration and awareness between sub-sectors within the sector, alongside a lack of consistent interdisciplinary interaction with other professions.
- There are also limited entry routes, which restrict the development of a diverse pipeline of talent. While much of the sector is highly qualified, there are significant gaps in entry-level pathways for those wanting to move into the sector from non-academic backgrounds.
- Alongside this, the workforce is overwhelmingly white and male and there are worrying gender wage disparities across the sector; men consistently earn higher wages that women, even in comparative roles.
- A looming management and maintenance skills crisis, with skills, resourcing and talent pipeline challenges perceived to be particularly sharp with regards to ongoing management, maintenance and monitoring of landscapes.

This report is a call to action for partners to develop and coalesce around a plan to enable the landscape workforce to take a leading role in delivering a greener future for the UK.


Derwent Valley Villa © J&L Gibbons

# Introduction

Landscape is an essential part of the quality of life for people everywhere. It provides a unique point of connection between the man-made and the natural. It enables us to feel engaged and curious about space; it permits us to explore the intersection between an individual and a place. It is where communities and identities are built.

But as the world faces growing climate and biodiversity emergencies, and a green skills deficit to combat them,[1] the point of difference between the natural and the constructed must reduce. No longer can these be considered fundamental opposites – the future needs them to coexist.

The UK Government has several key policy objectives which have this interaction at their core. Notably among them are addressing the housing shortage, mitigating and reducing contribution to climate change, and rebalancing the UK's economic geography.

These objectives will be delivered through investment in places, through their planning and design, by development and building and in their management, conservation and protection. Landscapes offer an opportunity to provide a harmonious link between the man-made and natural world in these interactions; linkages that will only increase in importance as we collectively respond and adapt to climate change.

## UK policy context

The UK Government has set ambitious policy objectives around achieving Net Zero, environmental enhancement, and Levelling Up. The UK Net Zero strategy and Levelling Up White Paper were both launched in 2021, and the Environment Act was given royal assent. It remains to be seen if these objectives will be maintained by the current UK Government. In November 2022, COP27 took place in the Egyptian coastal city of Sharm El-Sheikh. The summit's four key goals were identified as Mitigation, Adaptation, Finance and Collaboration. Time is running out to ensure that the world remains on a path to limit global warming to 1.5˚C. While international carbon reduction efforts continue, landscape will play a crucial role in how we adapt places to our changing climate.

1 Green Alliance. Closing the UK's green skills gap. (2021)



**Landscape is an important part of the quality of life for people everywhere: in urban areas and in the countryside, in degraded areas as well as in areas of high quality, in areas recognised as being of outstanding beauty as well as everyday areas.**

**It is a key element of individual and social well-being and its protection, management and planning entail rights and responsibilities for everyone.**

*European Landscape Convention*

Lovedon Fields, Hampshire © BD Landscape Architects

Particular policies of importance for the Landscape sector include:

- **Biodiversity Net Gain**; the UK Government is moving to implement Biodiversity Net Gain into planning processes. **The Environment Bill**, which received Royal Assent in November 2021, sets out a mandatory requirement for new developments to provide a 10% biodiversity net gain. It also set out the process of **Local Nature Recovery Strategies**, which are seeing local authorities develop spatial strategies for natural recovery.
- **Town regeneration:** The UK Government has placed a priority on revitalising local urban centres and high streets. Multiple competitive funds have delivered investment into towns and driven demand for Landscape services, while the Landscape Institute takes part in the High Streets Taskforce, alongside the Institute of Place Management, the Royal Town Planning Institute and the Association of Town and City Management.
- **Net Zero.** The UK Government's commitment to Net Zero by 2050 is sparking change in the landscape sector and driving demand for sustainable design and active travel. In July 2020, the UK Government published their **Vision for Cycling and Walking**, which saw £2bn committed to walking and cycling infrastructure.
- **Sustainable urban drainage:** Sustainable Drainage Systems (SuDS) are designed to manage stormwater close to source, avoiding run-off from sites and mimic natural drainage. **SuDS were made mandatory** in Wales in 2010 in major developments, but this has not followed through elsewhere in the UK. As such, progress remains to be made, with local authorities reporting poor quality proposals and over a quarter of local authorities having no formal SuDS policy in place.[2]
- **Design Reform:** The UK Government published the **National Design Guidance** in January 2021. The guidance represented a shift in best practice on planning and place-shaping, and was accompanied by the National Design Code.
- **25 Year Environment Plan:** The UK Government published their 25 year plan to improve the environment in 2018. The plan sat alongside two other important government strategies – the **Industrial Strategy** and **Clean Growth Strategy**. It is complemented by Natural England's **National Framework of Green Infrastructure Standards**.
- **Levelling Up and Regeneration Bill:** The UK Government introduced the bill to parliament in May 2022, which sets out the foundations for delivering this agenda to ensure all parts of the country can equally benefit in the nation's success.
- **Climate Change Adaption:** In 2018 the UK Government published their 5-year National Adaptation Programme (NAP), which sets out the key actions which government and others must take to adapt to the challenges of climate change over the next five years.
- **National Planning Policy Framework (NPPF):** Last updated in 2019, this sets out the UK Government's planning policies for England and how these are expected to be applied.

2 Landscape Institute and Construction Industry Council. Achieving Sustainable Drainage. (2019)



Responding to and driving these various agendas requires people with the right skills and experience. Landscape as a profession is closely associated with planning and development. With the UK Government controlling planning policy and with local government having relatively little discretion, national planning policy shifts have important implications for nature of work in the landscape sector.

Green skills is high on the government agenda. For example, the Green Skills Taskforce launched in November 2020 set out the direction for what a green jobs market needed to look like and how we can transition to get there. However, much of this focuses on STEM skills for decarbonisation. Some work has been done on Green Jobs for Nature, such as that by the Chartered Institute of Ecology and Environmental Management (CIEEM). This provides insight and context on a broad range of careers, from Environmental Educators to Conservationists. However, in this context, there is no authoritative perspective on the extent to which the UK has the skills it needs to deliver on its aims for landscapes and green infrastructure.

Partly this is due to the breadth and complexity of landscape, which is a broad coalition of interacting activities, cutting across recognised sectors, rather than a clearly delineated, singular entity. This makes it hard to measure, manage and co-ordinate.

Recognising this, the Landscape Institute (LI), and partners – Locri, Natural Resources Wales, the British Association of Landscape Industries, Historic England, Natural England, NatureScot, Historic Environment Scotland and the NI Department for Communities, commissioned this study to better understand the current shape of the landscape workforce and the main drivers of its future development.

Delivering this brief, Metro Dynamics has undertaken analysis of existing secondary data, a survey of 1,580 professionals and a series of in-depth interviews. Findings from this are presented in this report as follows:

- **Defining & measuring landscape:** An overview of the approach taken in this study and the definition of landscape developed with stakeholders and deployed in the research.
- **Landscape in numbers:** The main body of the report presents the measurements of size and shape of landscape and main features of both the workforce and the business base. This covers the sector's workforce, sub-sectors, GVA, average salaries, geography of employees and employment sectors.
- **Landscape drivers and trends:** An exploration of the drivers of change in the sector, drawing on insights captured through the deep dive interviews with stakeholders.

- **Positioning landscape to respond:** Our summary of what the research has identified is needed to ensure landscape can meet future demand findings, and the outstanding questions.

Further underpinning data is held by the Landscape Institute in a broader dataset, available on request.

## Defining & measuring landscape

Defining landscape as an economic activity is not straightforward. Its breadth of activity is not easily identified within Standard Industrial Classifications (SIC)[3] and Standard Occupation Classification (SOC)[4] structures that are traditionally used to describe and analyse sectors.

The Landscape Institute's (LI) previous workforce study[5] used a combination of SIC data and survey data to produce an estimate of workforce size. However, this has proved hard to repeat and as such a core aim in this study was to produce a standardised definition for measurement, which could be repeated by LI with ease and be recognisable for local and central government partners. Also critical in this study was also going beyond the boundaries of the LIs own footprint to include a broader range of landscape activities, essential in the delivery of the policy priorities set out in the previous section.

The requirements for replicability, familiarity and inclusivity pointed to the development of a 'best fit' definition that could link to national statistics, which are readily available and regularly updated, rather than relying on primary research.

To do this, our first step was to work with the project partners, and review existing definitions, to segment the different types of activity that are typically viewed as part of the landscape economy.

This engagement resulted in the development of an operational definition that allows, for the first time, collective analysis of landscape as one coherent entity, providing an understanding of how component professions and activities fit together.

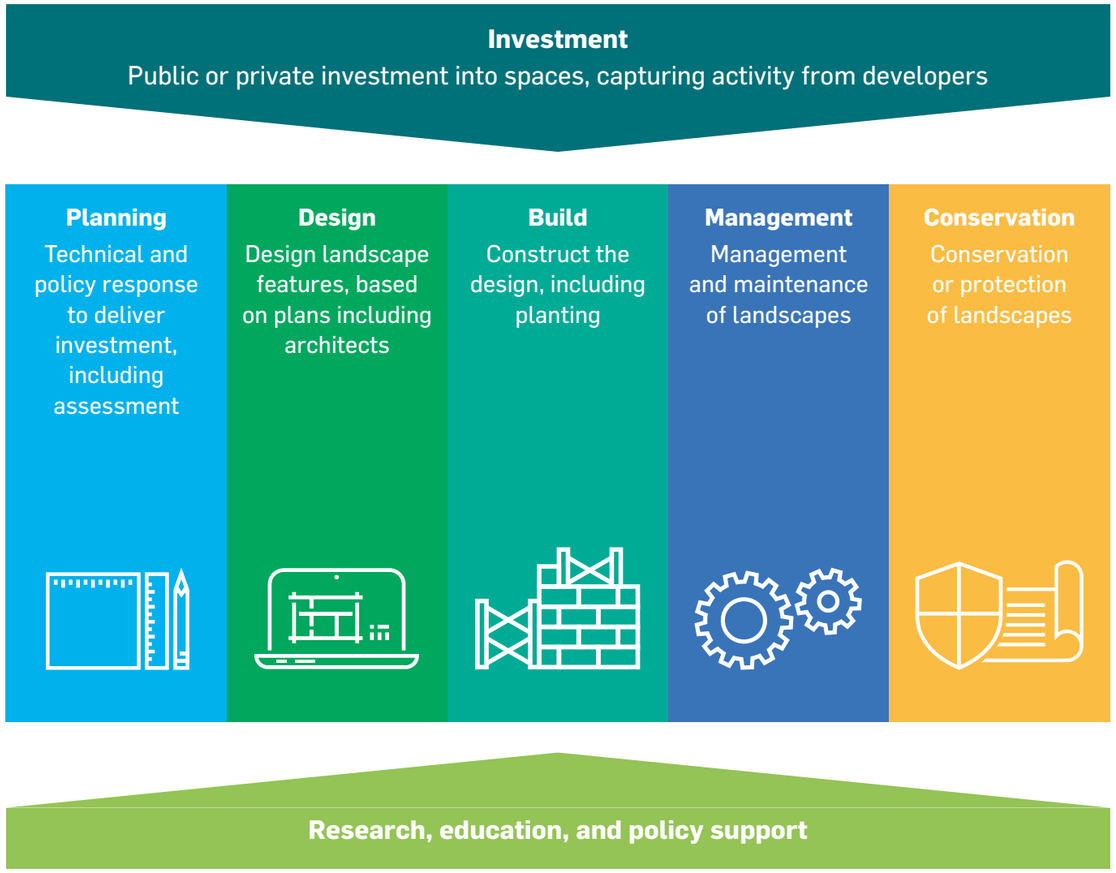
**Core landscape activities are the planning, design, build, management, and conservation of spaces. However, these activities are critically linked to investment and research, education and policy.**

3 Standard Industrial classifications or SICs classify workers/businesses by the type of economic activity that they engage in.

4 Standard Occupation classification is a coding framework used to classify occupations in the economy. SOC codes have between 1 – 4 digits, where a 4 digit SOC 4 offers the greatest level of occupation detail.

5 State of Landscape Research Report (2018)

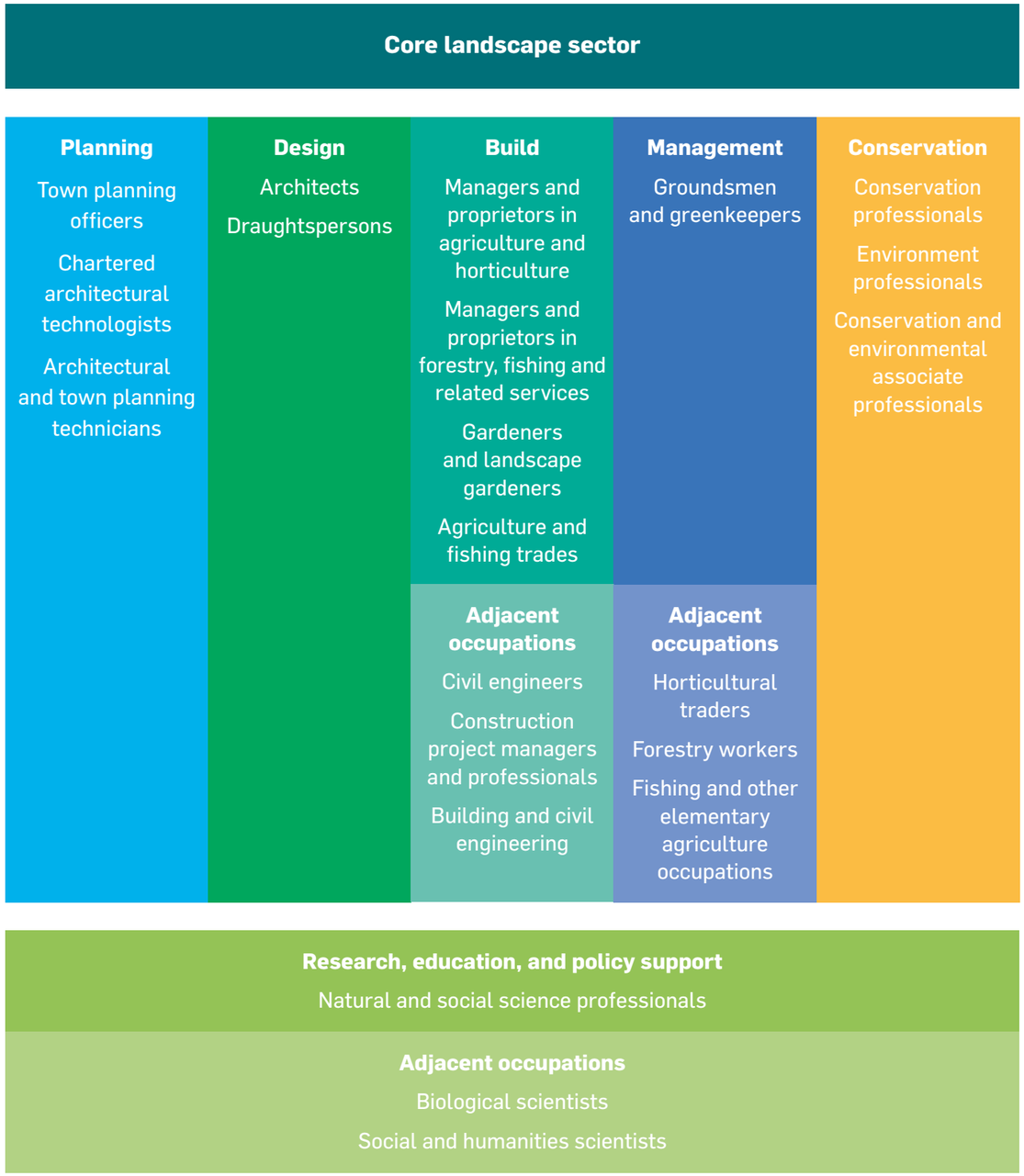
**Figure 2** *Definition of the landscape economy*




**Landscape**
The landscape sector is composed of five main elements. Landscape professionals and business often cut across all of these in their day-to-day activities.

This process highlighted landscape operating in coalition with a series of adjacent activities, skills and expertise to support and deliver outcomes that shape urban and rural landscapes, shown in Figure 2 above. For this report, the definition was distilled to the set of core activities and, unless stated otherwise, all data refer to this core.

**Figure 3** *A coalition of landscape activities*




To enable measurement, this core definition was aligned to SIC and SOC codes.

The 'pan sectoral' nature of landscape activities means that the definition predominately uses SOC codes, capturing occupations in which people work, rather than businesses in industries. An overview of the definition is provided in the appendix of this report and further detail on the methodology is available on request from the LI.

This widening moves on from the LI's previous research study, which captured only those falling within the LI's chartered footprint: landscape architects, landscape managers, urban designers, and parks managers. In 2018, the estimated size of this group was 16,845 (based on 2016 data). It has not been possible to precisely reproduce this figure. However, for the purpose of comparison, this was composed of 11,500 people employed in SIC 71112 and an additional 5,345 (32%) estimated from survey work. In 2021, 10,500 people were employed in SIC 71112, equivalent to an 8.7% fall in jobs. This was driven by a fall between 2020/21, where the sector contracted by 1,000 jobs.

Using the new definition allows for a broader, more inclusive measurement of the economic footprint of the landscape workforce. We have collated and analysed secondary data from the Office for National Statistics (ONS) to estimate the economic size of the landscape workforce, including jobs, businesses, gross value added (GVA) and earnings. This gives a means of maintaining a regular set of data on the size and scope.

However, ONS data will always have limitations driven by the classification systems, which place limits on specificity of activity and geographical detail.

For example, it is challenging to disaggregate landscape architects from architects in the official statistics, or groundsmen from landscape maintenance. An architect may design outdoor space, whilst a landscape architect may select plants for an indoor environment – separating these activities is never easy. For the purposes of this research, our touchstone has been those fundamentally involved in delivering in landscape outcomes.

A further specific limitation of ONS data for the landscape professionals is the challenge of isolating the specific activities of those who are working in local government. We have overcome this problem to an extent, by using national public and private employment ratios. However, given the way data are reported on local government employees, further specific work would be needed to understand this group in greater detail.

Understanding specific detail on activities, skills deployed and needed, and drivers of demand requires targeted primary research. As such, we also carried out a survey of approx. 1,500 practitioners across the UK and a series of one-to-one interviews with 30 key stakeholders across the sector to gather further qualitative insights.

**Landscape employs 333,900 people, 1.1% of the total workforce.**

**Gross Value Added (GVA) makes a marginally higher contribution at 1.4%. This reflects landscape's higher productivity, with GVA per job of £74,300 compared to the national average of £58,300.**

**The average salary of workers is £29,700, just above the national average of £26,036.**

Lovedon Fields, Hampshire © BD Landscape Architects

# Landscape in Numbers

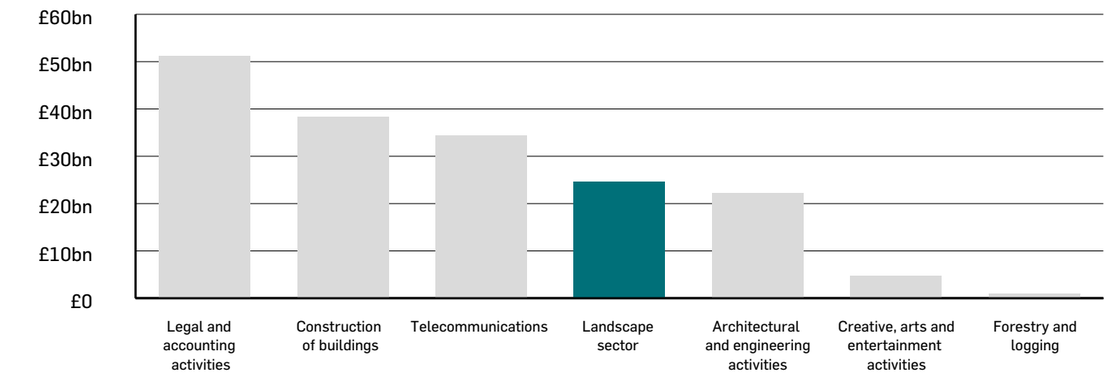
This is a significant section of the national workforce, making high-value added contributions. The charts below put landscape in the context of other sectors in the economy.

In GVA terms, the landscape sector provides a contribution of £2bn more than the related sector of architectural and engineering activities (recognising that some of this sector is also defined within the landscape), yet has a workforce that is smaller by 200,000 jobs.

**Figure 4** *GVA and employment of the landscape sector and other industries (2020)*

Source: ONS Regional Balanced GVA

***GVA (£bn)***




***Employment***

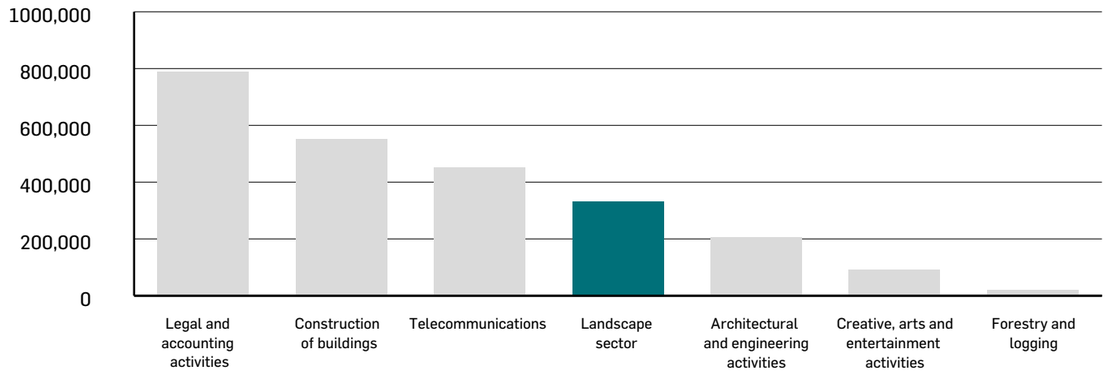


**Figure 5** *Regional map of employment (2020), businesses (2021) and salaries (2021)*

Source: ONS Regional Balanced GVA, BRES and ASHE

## Landscape across Great Britain

The workforce tends to be concentrated in the south, where London (56,600 jobs), Southeast (53,400) and East of England (35,300), make up 44% of the GB total. The distribution of businesses follows a similar pattern to employment, but with the Southwest also containing a high concentration. The Southeast/West, East of England and London make up 54% of the total business base.

Higher salaries are found in the areas with the largest concentrations of employment. London has the highest average salary at £36,300. On the other end of the spectrum, the East Midlands has the lowest earnings across Great Britain, with an annual salary of £26,200. This is largely attributed to its high proportion of jobs found in the lowest earning sub-sector of "build" whereas London having higher concentrations within more skilled professions found within the design and planning sub-sectors.

| | Jobs | Businesses | Earnings |
|---|---|---|---|
| **Scotland** | 33,124 | 4,019 | £28,038 |
| **North East** | 8,970 | 1,310 | £27,570 |
| **Yorkshire and the Humber** | 21,786 | 3,210 | £31,251 |
| **East Midlands** | 20,287 | 3,241 | £26,196 |
| **East** | 35,346 | 5,257 | £28,127 |
| **London** | 56,583 | 7,788 | £36,253 |
| **South East** | 53,691 | 8,718 | £30,309 |
| **South West** | 28,951 | 5,088 | £27,514 |
| **West Midlands** | 26,527 | 3,792 | £27,983 |
| **North West** | 31,343 | 4,603 | £27,370 |
| **Wales** | 14,248 | 2,298 | £26,923 |

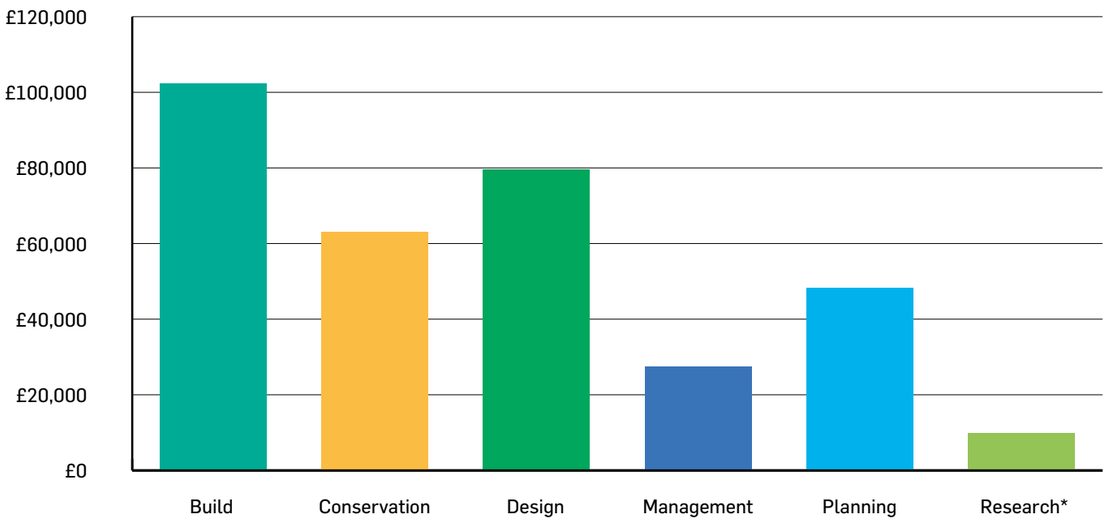
## Landscape sub-sectors

The largest landscape sub-sector is 'Build', with 102k people, the majority of whom are gardeners, followed by design (79k), conservation (62k), planning (48k), management (27k) and research (10k).

**Figure 6** *Employment, businesses and GVA by landscape*

Source: ONS Regional Balanced GVA, BRES and UK Business Counts

***Employment by sub-sector (2020)***




* Research, education and policy support

**Figure 7** *Employment, businesses and GVA by landscape*

Source: ONS Regional Balanced GVA, BRES and UK Business Counts

***Business by sub-sector (2020)***

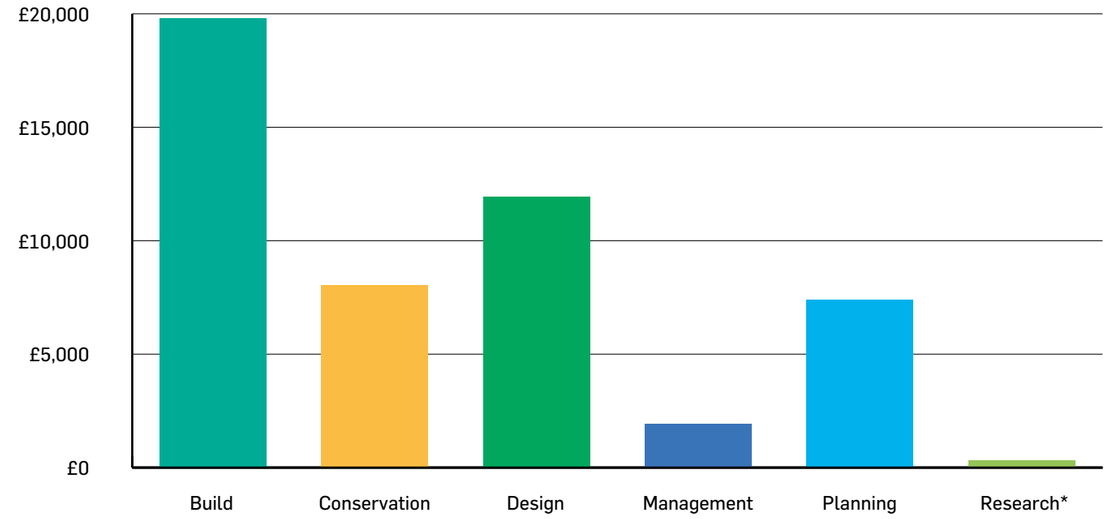
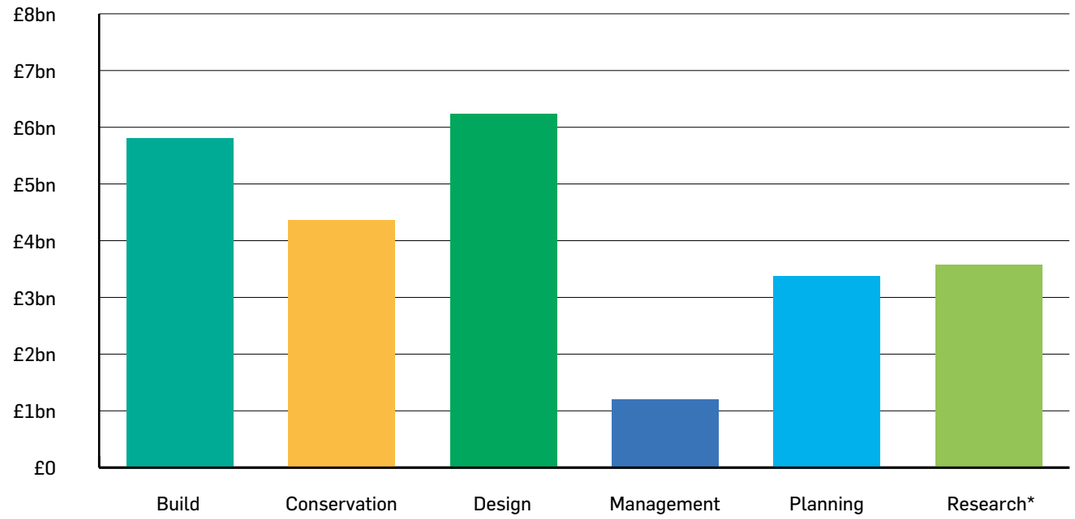



**Figure 8** *Employment, businesses and GVA by landscape*

Source: ONS Regional Balanced GVA, BRES and UK Business Counts

***GVA by sub-sector (2020)***




* Research, education and policy support

Businesses follows a similar trend, where the largest landscape sector is build with around 20k businesses, followed by design (12k) and conservation (8k), planning (7k), management (2k) and research, education and policy support (300).

Despite build having the largest workforce/business base, it is design that produces the highest level of GVA (£6.2bn) reflecting its higher productivity. This is followed by build (£5.8bn) and conservation (£4.4bn). Management produces the lowest level of GVA (£1.2bn), owing to the lower skilled manual types of work that workers are engaged in within this sub-sector.

The survey enabled respondents to reflect where their activities cut across different aspects of landscape. This found that most cross-sector combinations of work were between design, planning and management, and a particular lack of interaction between build and other sub-sectors.

**Figure 9** *Working across sub-sectors (2022)*

Source: Landscape Skills and Workforce Survey

***Number of sub-sector selections made in the survey***

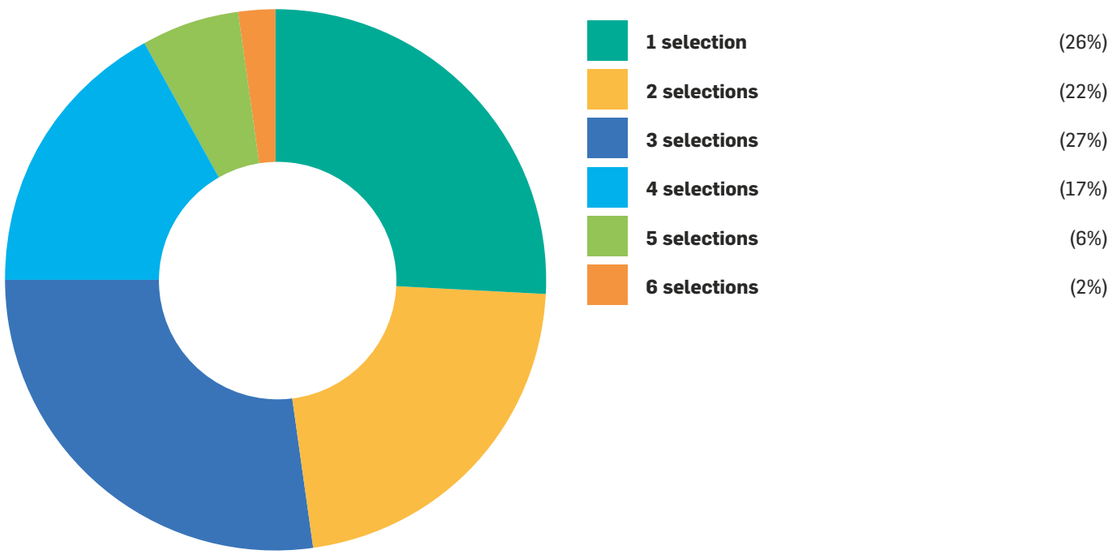
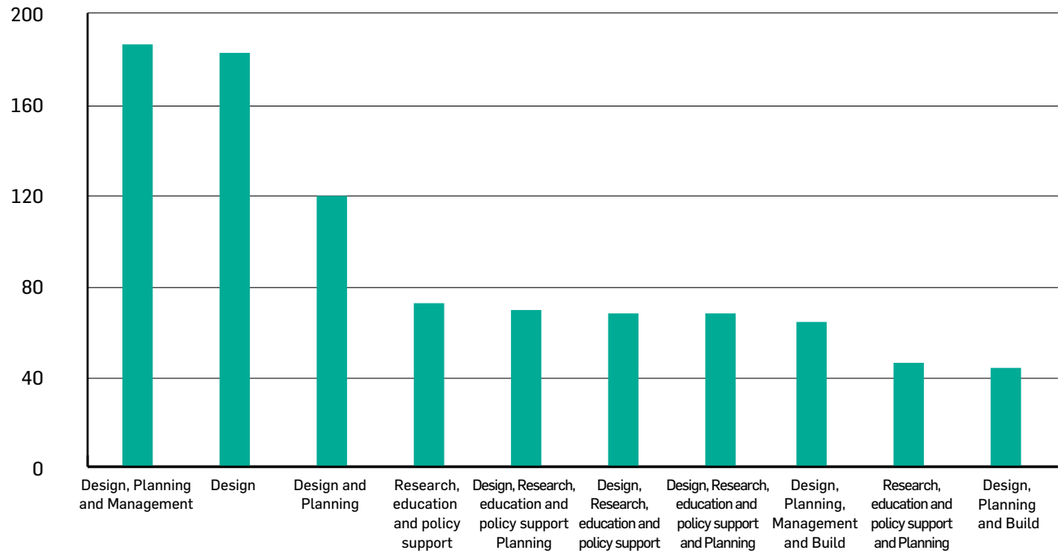



**Figure 10** *Working across sub-sectors (2022)*

Source: Landscape Skills and Workforce Survey

***Top 10 sub-sector combinations***



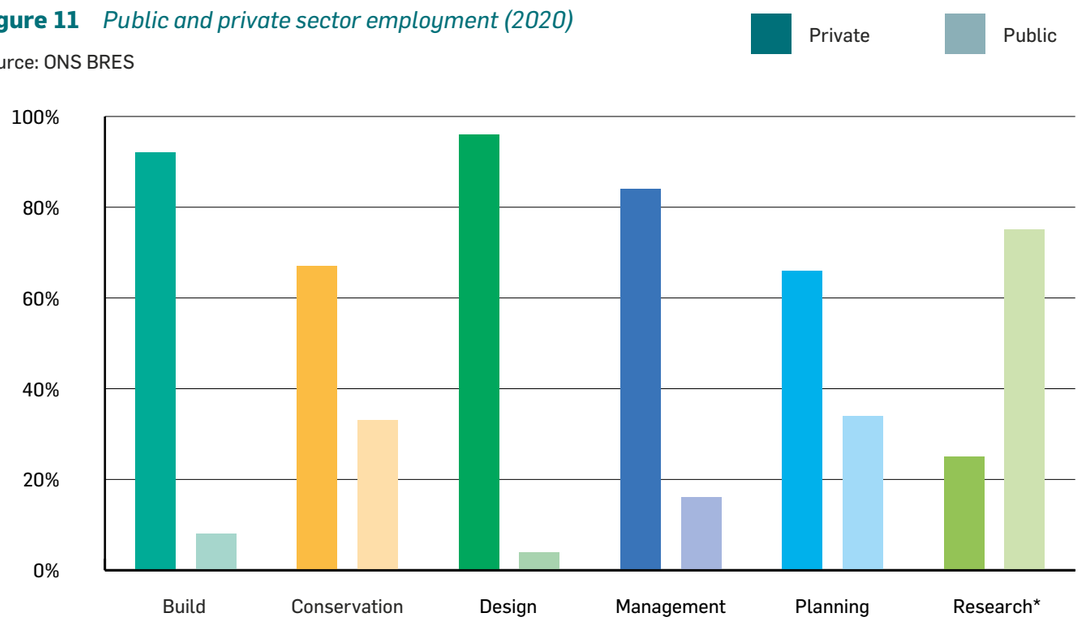

The Kitchen Garden, RHS Bridgewater © Harris Bugg Studio

## Public and private sector workers

The overall workforce is largely employed in the private sector, with 82% (270k) of employment in commercial services. The data highlights the dominance of private sector in design and build of projects, representing 96% and 92% of the workforce respectively and to a significant degree management (84%). Public sector plays a bigger role in planning and conservation at around a third of the workforce.

**Figure 11** *Public and private sector employment (2020)*

Source: ONS BRES




* Research, education and policy support

## Growth trends

Over the past decade, the workforce has been growing, increasing by 18% from 2010, compared to a 10% increase across all industries of the economy. Capturing the pandemic impact, the workforce contracted between 2019 and 2020, by 15,000 jobs.

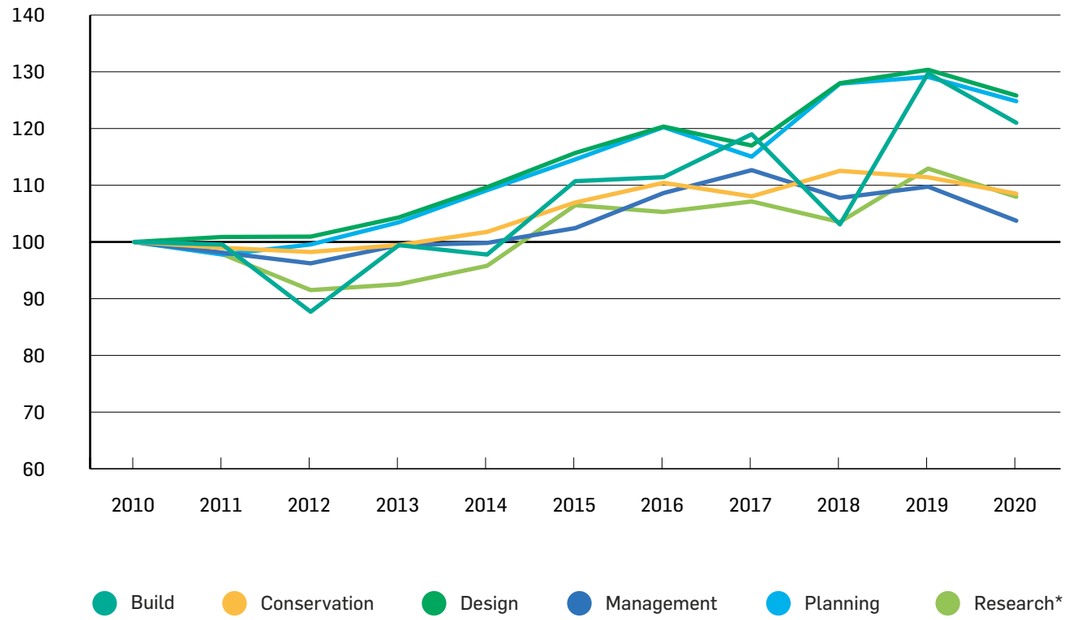
The chart below shows the change in employment by sub-sector since 2010. Employment has been indexed to show relative change between the sub-sectors. Build, design and planning have been driving the growth observed in the sector overall, with around a 30% increase since 2010. Conservation, management and research, education and policy support, have increase at a slower rate, below 10% since 2010.

**Figure 12** *Indexed employment change over time by sub-sector (2010 – 2020)*

(Index =100)

Source: ONS BRES

***Indexed employment change over time by sub-sector***




* Research, education and policy support

## Landscape businesses

Landscape businesses are predominately micro businesses, employing less than 10 people. A high proportion also turnover below £100k per year, around or below the VAT threshold of £85k.

The primary source of turnover varies based on business size, but those earning the least tend to have private households as their main client. A significant proportion of the business footprint is in the 'build' sub-sector. These are mainly small independent businesses, most likely owner managed and started initially via a self-employment route.

For almost half of the landscape businesses, developers are the primary client, making them a dominant influence on trends in the sector and the type of work done.

**Figure 13** *Primary source of income across all landscape businesses (2022)*

Source: Landscape Skills and Workforce Survey

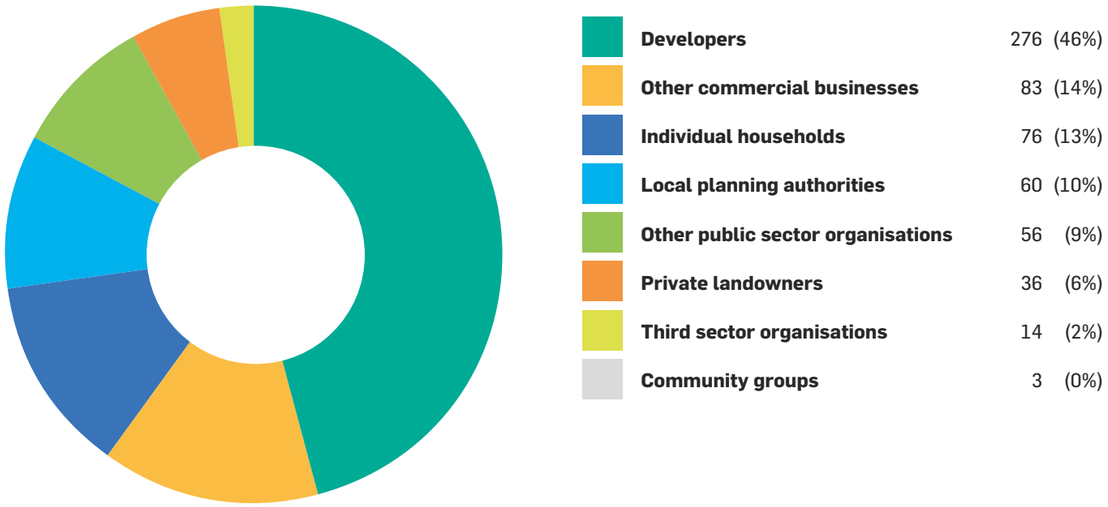
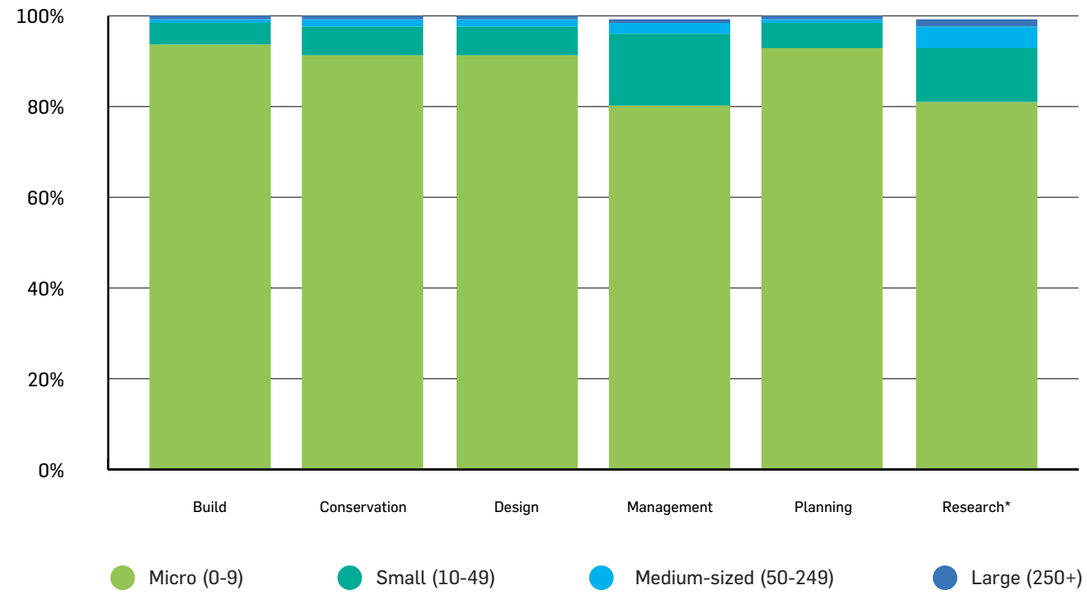



**Figure 14** *Businesses by landscape sub-sector and employment size band (2021)*

Source: ONS UK Business Counts




A significant proportion of the business footprint is in the 'build' segment. These are mainly small independent businesses, most likely owner managed and started initially via a self-employment route.

Whilst some large organisations operate in the sector, the majority are very small with 94% employing less than 10 people.

1/3

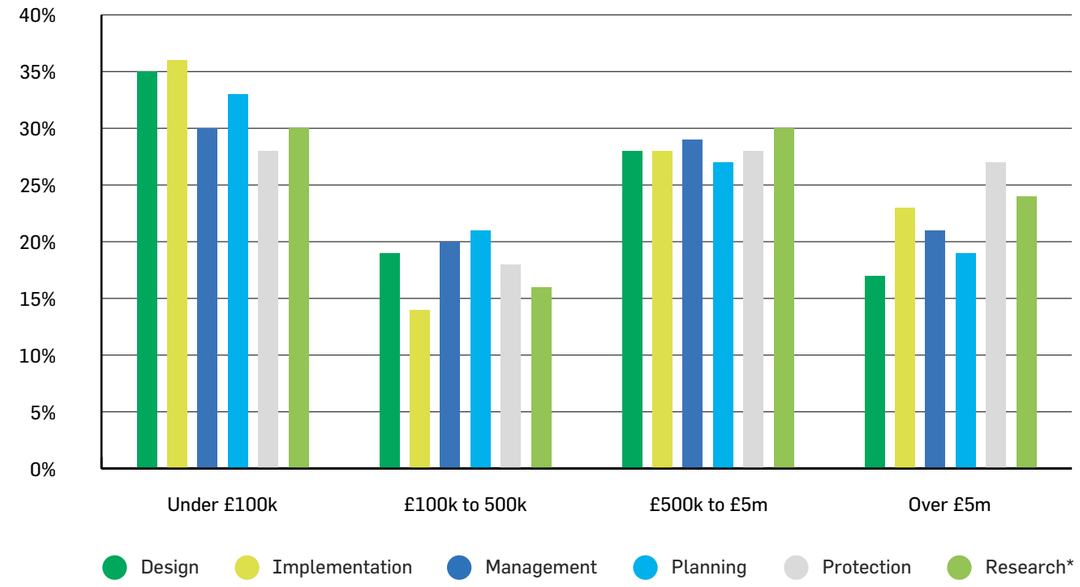
Over a third of businesses produce annual turnover of below £100k.

* Research, education and policy support

Mytholmroyd Flood Alleviation Scheme, West Yorkshire © Atkins

**Figure 15** *Businesses by landscape sub-sector and turnover band (2022)*

Source: Landscape Skills and Workforce Survey




1/2 Almost half of businesses have developers as their primary source of turnover.

High earning businesses (£40m+) have a more balanced spread across developers (28.1%), other commercial businesses (21.9%) and public sector organisations (21.9%).

Low earnings businesses (<£50k) cite individual households as their primary source of turnover.

* Research, education and policy support

## Business challenges

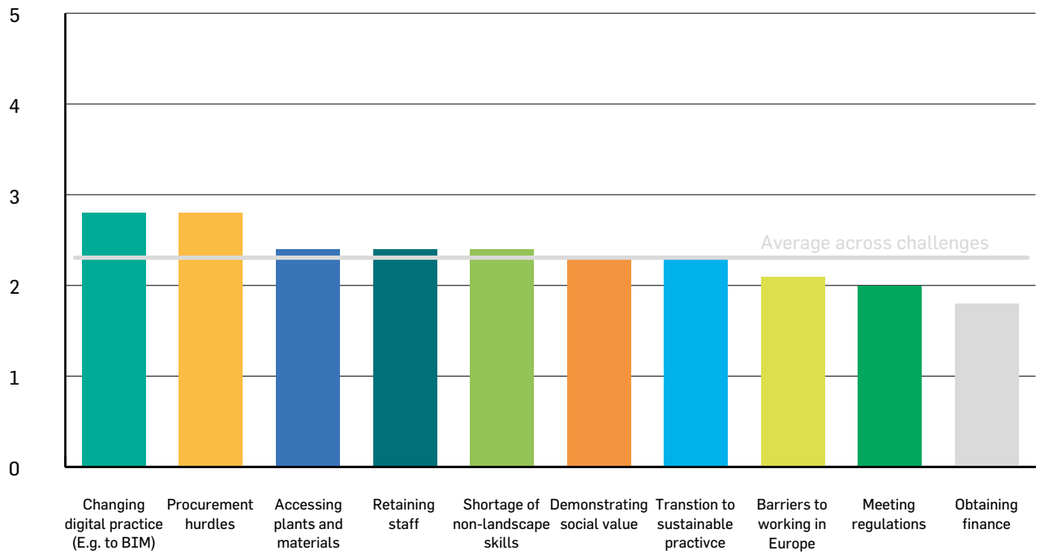
Businesses are generally positive in their outlook, with few identifying acute challenges. Digitalisation and procurement were the most pressing concerns, followed by access to materials and workforce retention/skills. Across sub-sectors, there is little variation in the level of perceived constraint against the challenges illustrated below. The most significant business challenges are changing to digital practice and procurement hurdles.

Rural businesses[6] perceive access to plants, retaining staff and changing to digital practice as more significant challenges relative to urban businesses. Urban businesses perceive the transition to sustainable practice, demonstrating social value and obtaining finance as more significant challenges.

6 Businesses located in areas with less than 50% of their land classed as urban (according to ONS rural/urban classifications).

**Figure 16** *Business Challenges by Score (2022)* (Where 1= Not a challenge and 5 = A significant challenge)

Source: Landscape Skills and Workforce Survey




Cornwall State of the AONB Report © LUC (Land Use Consultants)

The most significant business challenges are changing to digital practice and procurement hurdles.

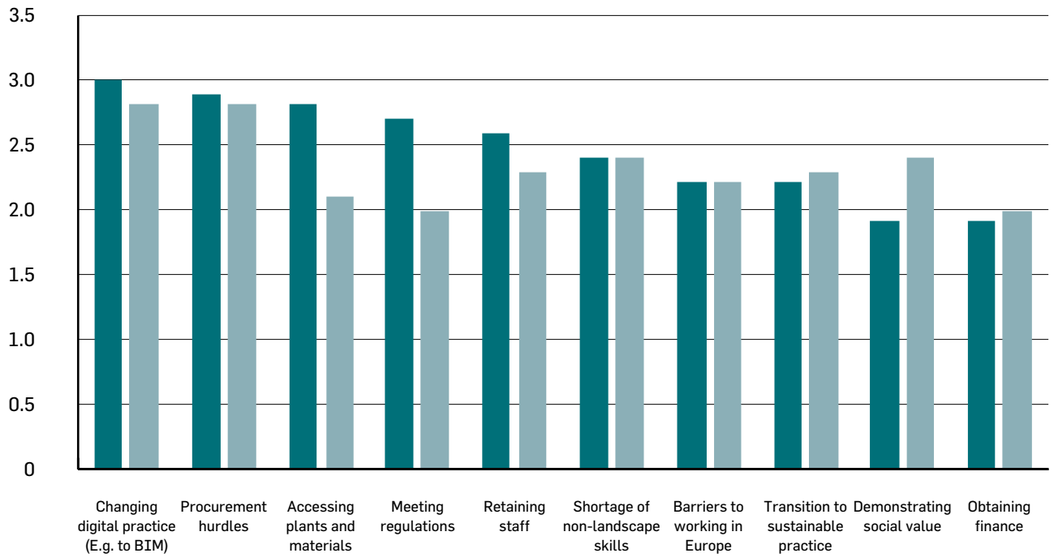
Rural businesses perceive access to plants, retaining staff and changing to digital practice as more significant challenges relative to urban businesses.

There is no challenge that is particularly constraining, with the highest score below 3.

Urban businesses perceive the transition to sustainable practice, demonstrating social value and obtaining finance as more significant challenges.

**Figure 17** *Business challenges by rural/urban location (2022)*

Source: Landscape Skills and Workforce Survey




Perceived business challenges are generally similar between rural and urban places, but there are some distinct differences. Themes that are perceived to be more challenging in rural areas compared to urban areas include accessing plants and materials (0.7 score difference), meeting regulations (0.7 difference) and retaining staff (0.3 difference). In contrast, themes that are perceived to be of greater challenge for urban areas include demonstrating social value (0.5 difference), transition to sustainable practice (0.1 difference) and obtaining finance (0.1 difference).

Fidelity Campus, Tadworth © BD Landscape Architects

## Workforce demographics

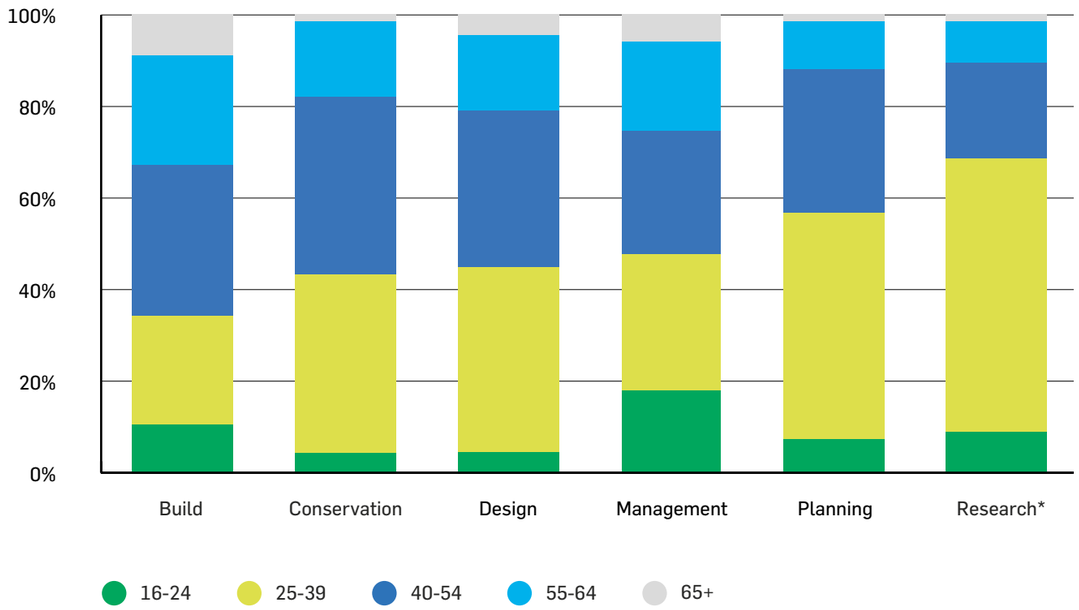
The Landscape sector workforce is male dominated, white and relatively older.

Management and build have the highest male concentrations at 99.6% and 86.7% of their respective totals. Research, education, and policy is the only area of activity where there is a higher proportion of females at 52.5%.

As shown in Figure 18, research education and policy has the youngest workforce, with 68% aged below 39 and around 10% aged 55+. Planning also has a young workforce with 56% below the age of 39. Management has a particularly high proportion of young workers that are aged 16-24 at 18%, possibly reflecting greater variety of entry routes into the sub-sector, and particularly those which do not require prolonged higher education study. Build is the most polarised in terms of age, with the second highest proportion aged 16-24 (10%) but the highest aged above 55+ (33%), possibly reflecting the easier entry routes and job opportunities available to older low-skilled workers.

**Figure 18** *Workforce distribution by sub-sector and age (2020)*

Source: Metro Dynamics analysis of ONS APS and BRES




* Research, education and policy support

Bradbury Lane Urban Woodland © Cannock Chase District Council

Sector is male dominated at 77.3% of the total workforce.

Largest proportion of workers aged 35-50 at 33.4% of the total, followed by 50-64 at 29.6%.

93.1% of survey respondents are white ethnicity.

Management and build have the highest male concentrations at 99.6% and 86.7% of their respective totals.

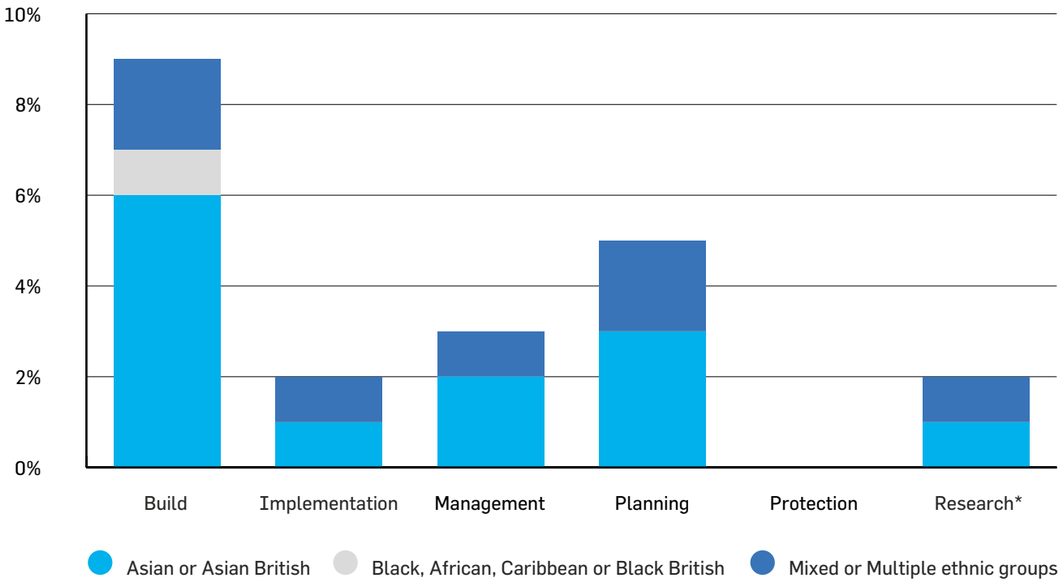
Research, education, and policy is the only area of activity where there is a higher proportion of females at 52.5%.

There are increased risks however to an older workforce occupying the Build sub-sector, such as older workers being more likely to experience severe injuries if involved in any accidents. Additionally, the risks of an aging workforce making up the majority of the Build sub-sector raises challenges around future capacity and skills shortages within these more physically demanding projects. Should these workers experience health issues preventing them continuing this type of work, or if they enter retirement, it will leave a significant skills gap for this line of work.

**Figure 19** *Workforce distribution by sub-sector and ethnicity (2020)*

Source: Landscape Skills and Workforce Survey

***% of sub-sector made up of minority ethnicity group***

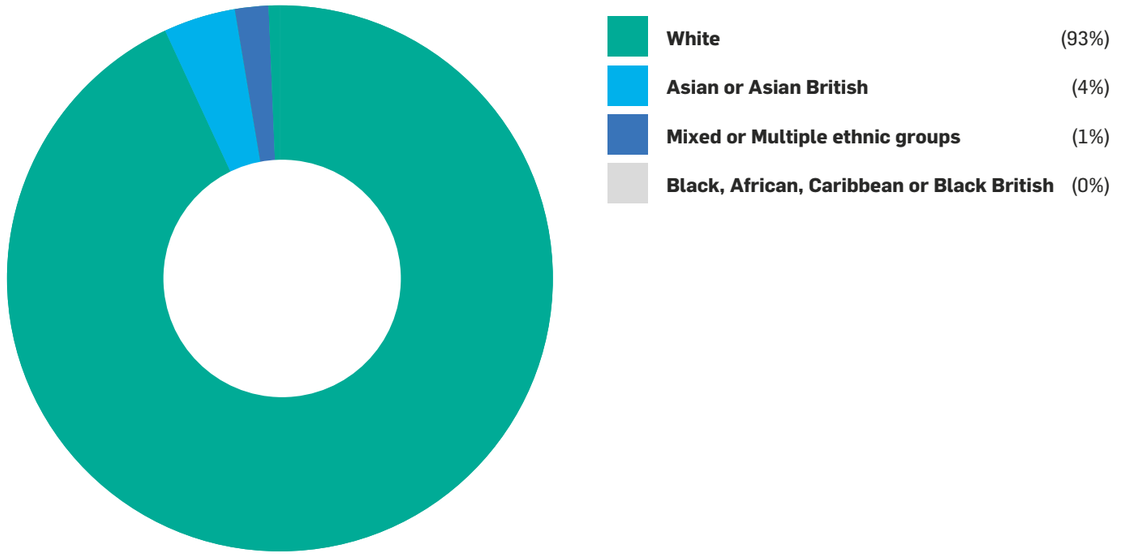



* Research, education and policy support

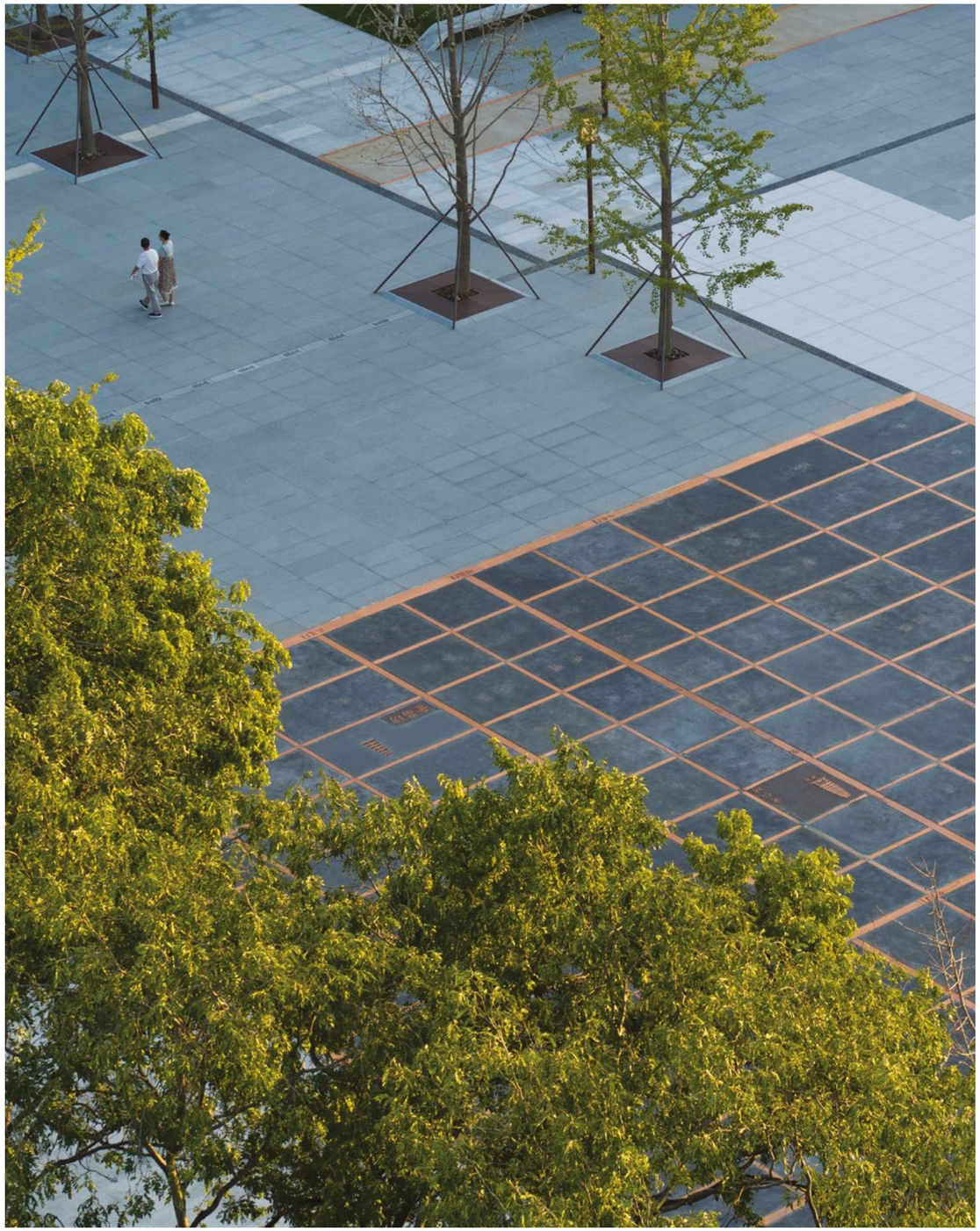
**Figure 20** *Workforce distribution by sub-sector and ethnicity (2022)*

Source: Landscape Skills and Workforce Survey

***Total workforce by ethnicity***




The sector is predominantly white, at around 93% of the workforce, compared to 86.8% nationally. Ethnic minorities are most pronounced across the design sub-sector at 8% of the total. Sub-sectors with the lowest levels of ethnic minorities in the workforce are protection (1%), research, education, and policy (2%) and implementation (2%).



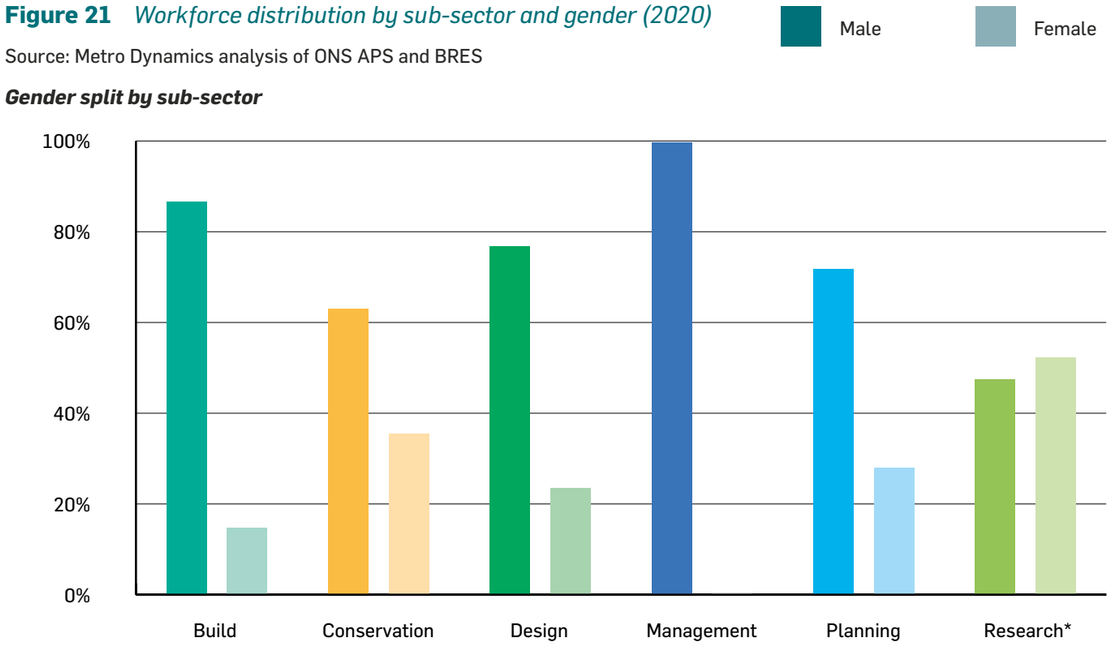
Small Wild Goose Pagoda, Xi'an, China © AECOM

Figure 21 below shows the gender split by sub-sector, with very high male concentrations in physically intensive activities, with almost no workers in management being female.

**Figure 21** *Workforce distribution by sub-sector and gender (2020)*

Source: Metro Dynamics analysis of ONS APS and BRES

***Gender split by sub-sector***




* Research, education and policy support

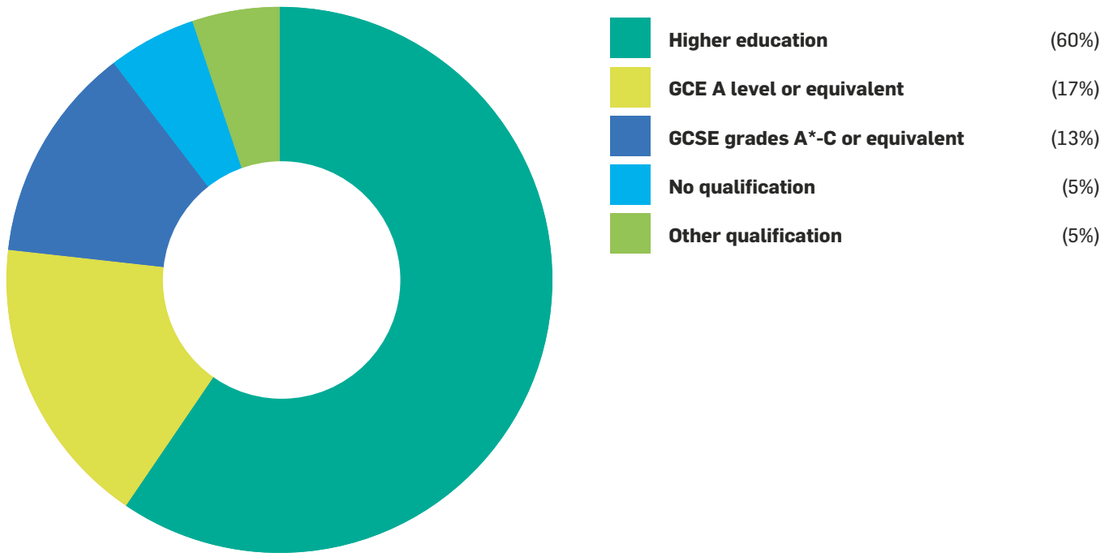
## Current skills levels

The landscape sector workforce is highly skilled with 60% attaining higher education or degree equivalent, compared to 45% for the economy as a whole. The proportion with no qualifications is 5%, which aligns with the national average.

Skills attainment varies significantly between the sub-sectors that are more technical and those that are physically labour intensive. Planning (90.4%), conservation (83%) and design (78.4%) have high proportions with higher education attainment. In contrast less than a quarter of the workforce in management and build have higher education, and over 10% have no qualifications. Whilst these sub-sectors will always inevitably include significant elements of physical labour, it doesn't necessarily follow that they will remain within low or no qualification roles. Ongoing digitalisation of processes and equipment is likely to drive greater demand for technical skills, which in turn are likely to be delivered via qualifications and accredited learning.

**Figure 22** *Skills of the workforce (2020)*

Source: ONS Annual Population Survey




Lovedon Fields, Hampshire © BD Landscape Architects

The largest segment of the workforce is build, where gardeners account for 88.5% of the total (90,000 jobs).

The smallest segment of the workforce is management at 8% of the total.

A quarter of survey respondents selected one segment, with most of the cross-segment combinations across design, planning and management.

60% of the workforce attain higher education compared to 45% across all national occupations.

Highest HE attainment in planning (90.5%), conservation (83.2%) and design (78.4%) and lowest in build and management (<25%).

## Future training intentions

There is a high level of intention to undertake training over the next year, with this particularly pronounced for those in entry level roles, with more than a quarter planning to undertake significant training. This reflects the skills shortages businesses are facing, with around half of businesses having a hard to fill vacancy. Subjects important for training include conservation, Building Information Modelling (BIM), sustainability, biodiversity net gain, climate change, Revise Instantly software (RVIT), Landscape and Visual Impact Assessment (LVIA), and planning policy. The subjects highlighted above would suggest there is a call for greater digital skills in the workforce, with many of these using visual modelling software.

75% of employees intend to undertake training over the next 12 months.

50% of businesses have a hard to fill vacancy, with most struggling to recruit mid-level roles.

Entry level roles have the highest relative proportion that will undertake significant training at 27% of the total.

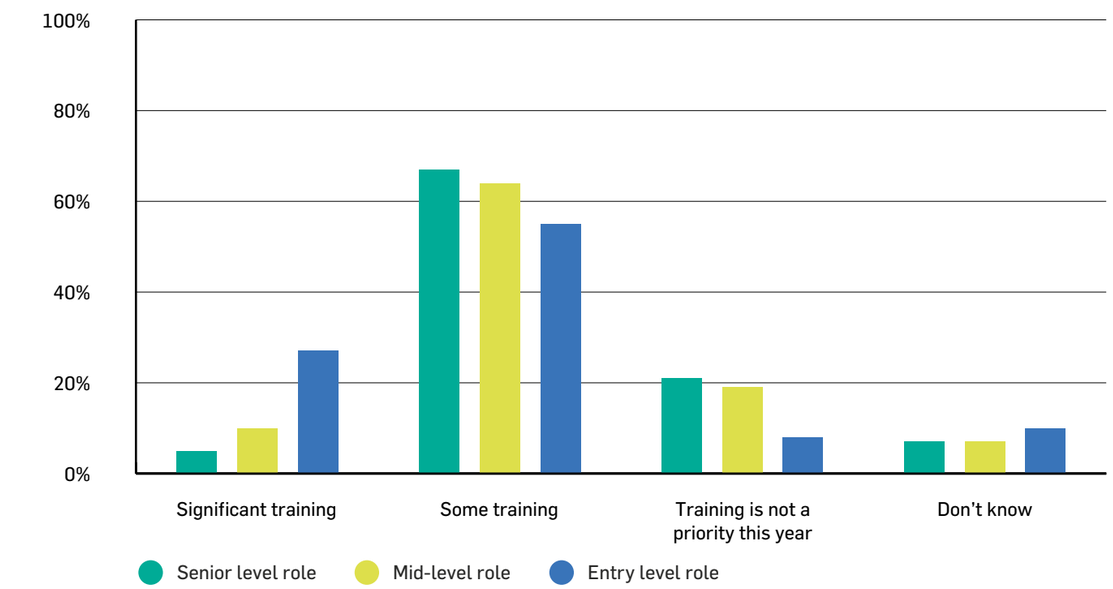
50% of businesses state that they have a hard to fill vacancy. 66% of these businesses struggle to recruit people who design places and spaces (design) and 46.7% struggle to recruit people who undertake landscape assessments (planning).

**Figure 23** *% of businesses that have a hard to fill vacancy (2022)*

Source: Landscape Skills and Workforce Survey

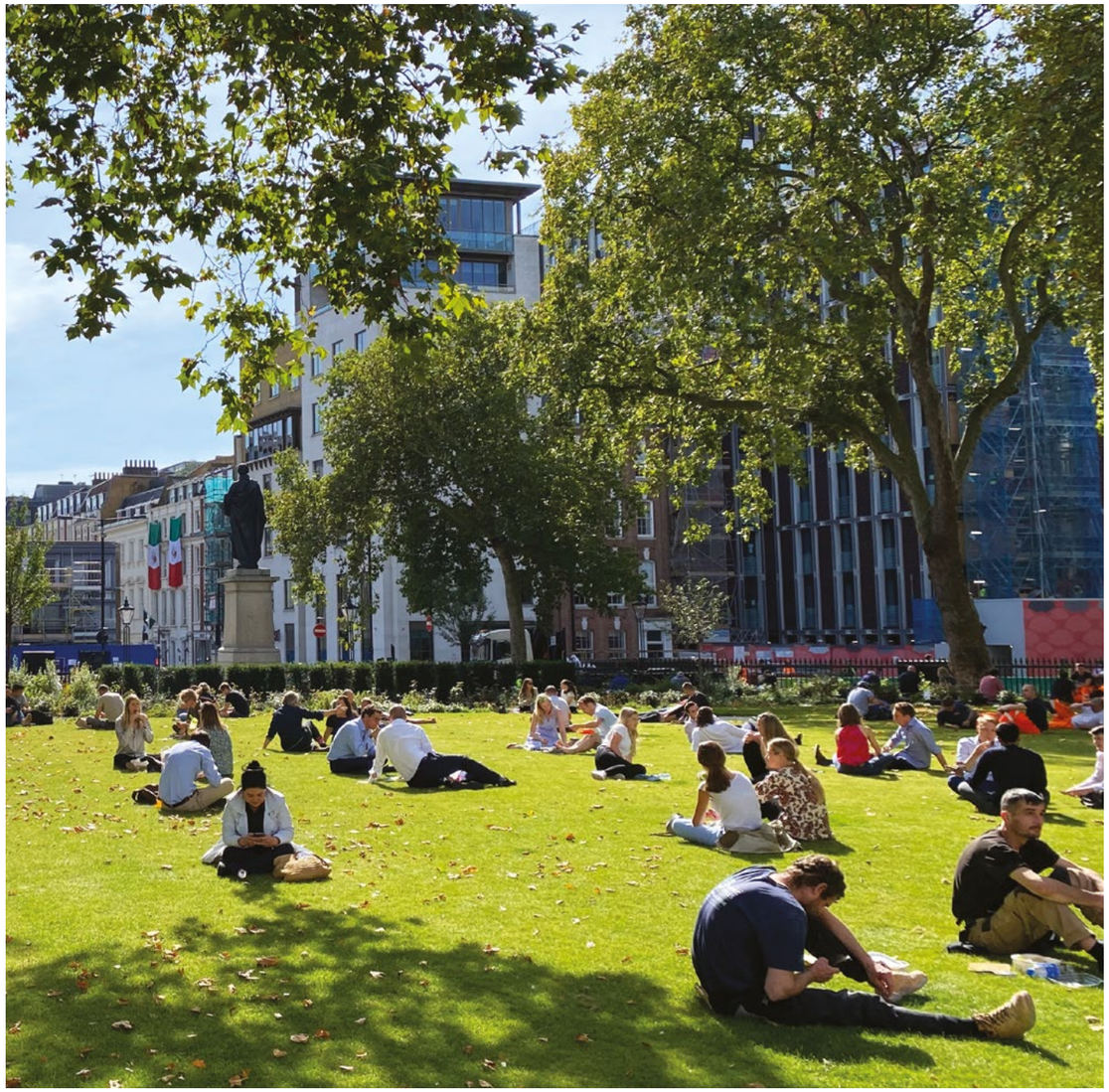

**Figure 24** *Training intentions by job role (2020)*

Source: Landscape Skills and Workforce Survey



## Take-up of apprenticeships

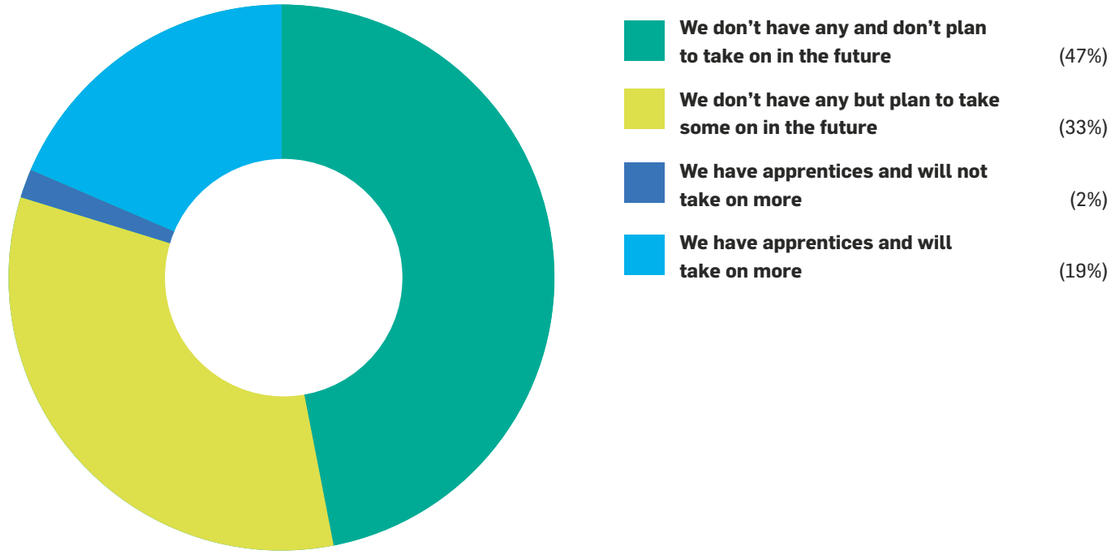
Apprenticeships are an important opportunity bring talented workers into the sector. However, take up is low; only 20% of respondents noted that they have ever employed an apprentice. As might be anticipated, larger businesses are much more likely to consider taking on an apprentice; a limiting factor on take-up when so many of the sector's businesses are small.



Hanover Square Gardens, London © WSP

**Figure 25** *Current and future apprenticeship intentions across landscape (2022)*

Source: Landscape Skills and Workforce Survey



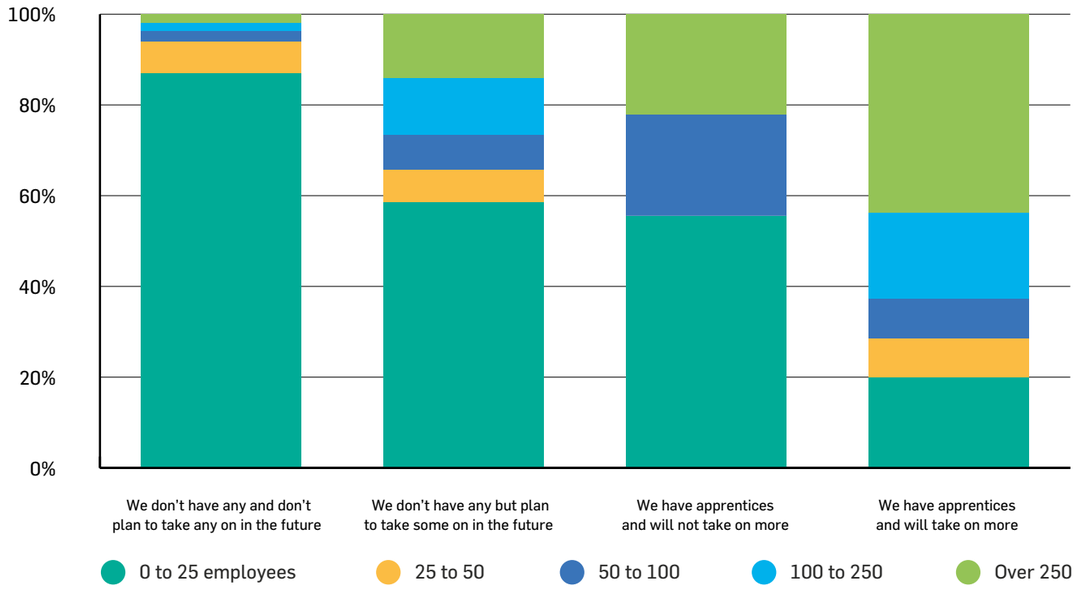

Around 50% of businesses don't have any apprentices and do not plan to take on any apprenticeships in the future.

Apprenticeship intentions are often linked to business size, with 87% of businesses with no apprenticeships and no future intentions, having less than 25 employees… but a quarter of businesses with apprenticeships and no plans to take on more, are large (250+ employees).

**Figure 26** *Current and future apprenticeship Intentions by employment size (2022)*

Source: Landscape Skills and Workforce Survey

***Apprenticeships by business employment size band***




## Salaries

As shown in Figure 27 on the following page, there is variation in salaries between sub-sectors, with a £18,250 difference between the lowest and highest earning. Design and planning have higher wages than the GB average, with the more physically intensive sub-sectors (build and management) having earnings below the national average. There are also significant gender wage disparities across the sector, as shown in Figure 28. Even when compared across job level, males consistently earn higher wages than females. The public and private sector analysis within these sub-sectors provides some interesting insights – particularly in the context that research, education and policy is the only sub-sector which is dominated more by public sector workers than private, and is here shown to produce among the highest annual salaries. In contrast, the build sub-sector, which is overwhelmingly dominated by private sector workers, produces the lowest average salaries.

Highest paid core segment is design, with average annual earnings of £36,800.

Lowest paid core segments found in build and management at below £20,500.

**Figure 27** *Annual salary by sub-sector (£) (2021)*

Source: Metro Dynamics analysis of ONS ASHE

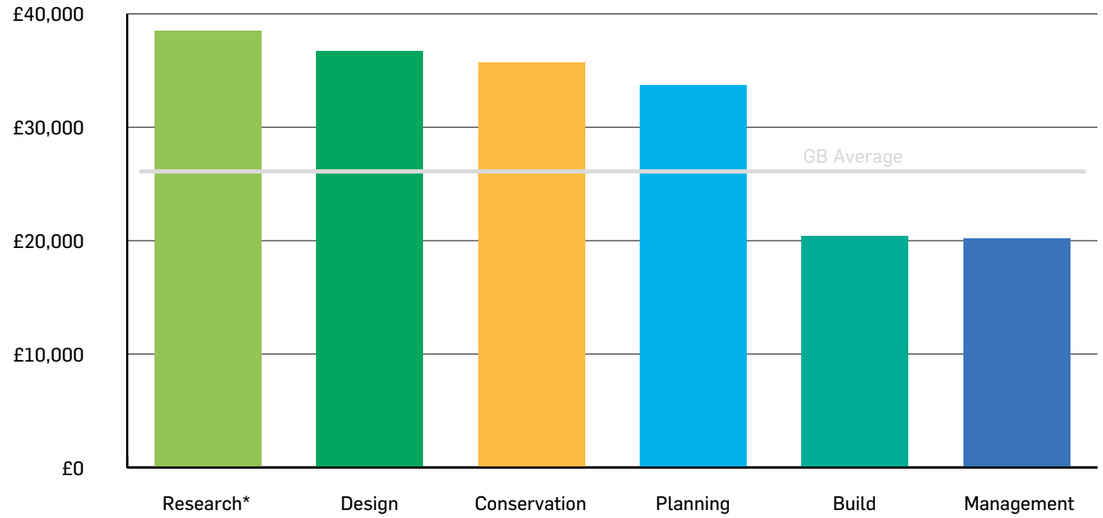



**Figure 28** *Landscape gender wage gap (2022)*

Source: Landscape Skills and Workforce Survey

***Salary of respondants by gender***


* Research, education and policy support

The Claypits, Glasgow © LUC (Land Use Consultants)

19% of males earn above £35k compared to 5% for females at entry level roles.

58% of males earn above £35k compared to 48% for females at mid level roles.

63% of males earn above £45k, compared to 45% of women at senior level roles.

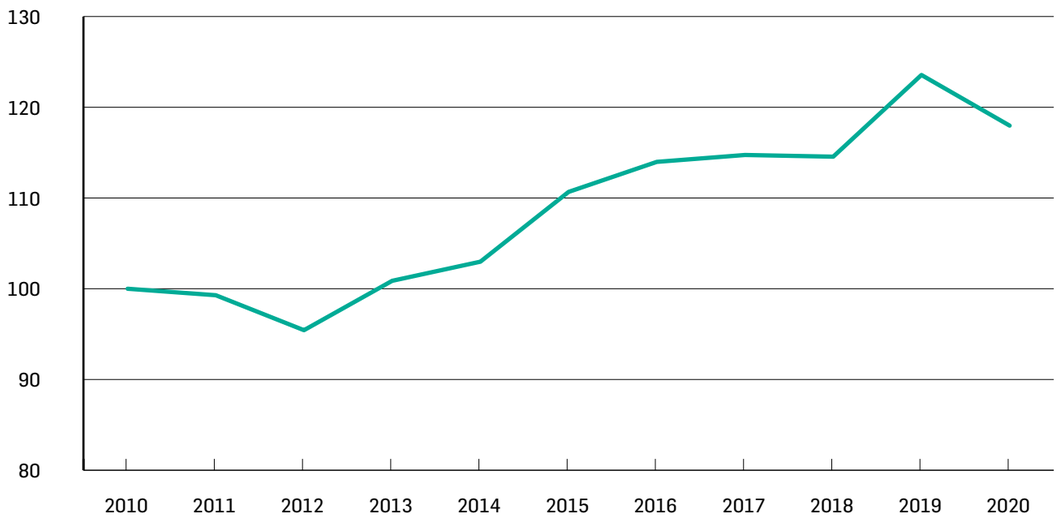
# Landscape drivers and trends

Participants in the study broadly expected continued expansion of demand for landscape skills and expertise, even in the case of an economic downturn linked to the current cost of living crisis. This was considered to not be the case during the 2008 financial crisis. Rather, the 2008 recession and the subsequent period of austerity had a scarring impact on the sector, holding down wages and productivity, deterring entrants and reducing the capacity to respond demand increases.[7] This observation is backed by data, with employment in the sector decreasing by 5% 2010-2012.

7 CIEEM. A Crisis in Our Sector. (2021)

**Figure 29** *Sector employment over time (2010-2020)* (Where 2010 = 100)

Source: ONS BRES




Through the survey and the qualitative interviews, participants noted a range of contemporary drivers of demand for landscape practitioners and businesses in the UK.

**How we use our land is at the centre of many current global issues: food security, energy security, climate adaptation, nature recovery, housing, economic development. At whatever scale, all require land.**

**Work to address them impacts the character and the quality of land and the way people experience and perceive it. The landscape sector and the skills, knowledge and experience of its workforce is therefore in greater demand than ever before.**

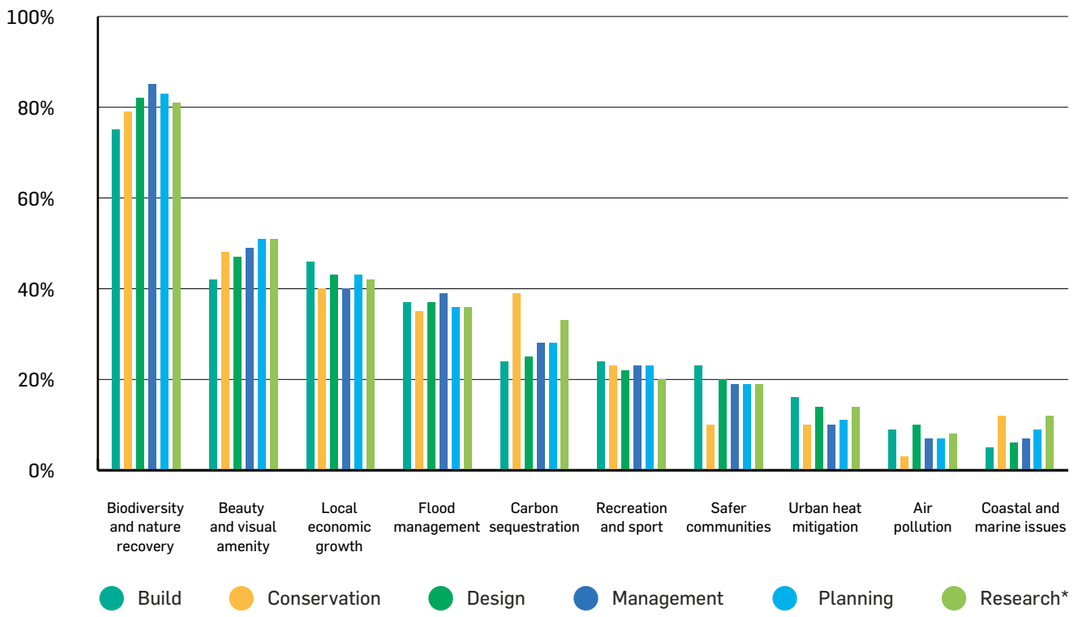
Inger Munch's Pier, Oslo © J&L Gibbons

Current high levels of demand for services has had consequences for recruitment in the sector. **Many interviewees discussed a highly competitive hiring market, especially with regard to mid-career workers, and strong competition between landscape practices and multi-disciplinary firms.** Some noted a high level of choice for workers, and a clear employee preference for 'engaging' design work. This competitive market has pushed up salaries across the sector, although respondents noted that this was not enough to substantially expand the talent pipeline, and that salaries largely remain low relative to comparable disciplines.

Interviewees also noted **increased use of digital technologies in Landscape design and delivery and a corresponding decrease in use of traditional techniques such as hand sketches** as an important driver of change in practice. This is not only driven by availability of technology, but strong cost pressures from clients driving rapid adoption of technologies and continual reskilling, and which were likely to continue.

However, **policy drivers tended to be foremost in people's minds.** Figure 30, below, shows drivers as selected by respondents across each of the landscape sub-sectors.

**Figure 30** *Drivers of change as identified in survey of Landscape Practitioners (% of respondents in each sub-sector that cited themes as a driver of change) (2022)*




* Research, education and policy support


Kampus, Manchester © Exterior Architecture

High in the minds of most were those things which are also currently at the forefront of mainstream policy, demonstrating the significant policy push on the sector.

Identified less frequently are those which are currently more peripheral to current policy debate, but are steadily moving closer to the centre. For example, COP27 has brought climate mitigation to the forefront of debate after identifying it as one of four key themes for the 2022 summit. The urgent need for transformative action on both mitigation and adaptation methods are fundamental to ensuring nations are suitably equipped and resilient to dramatic changes in climate.

Whilst we can reasonably expect these to become more central in focus for a greater proportion of the sector in coming years, **climate change mitigation and climate adaptation currently dominate discussions of both present and future expectations of work.** As one interviewee put it, "it is the only game in town". Both private and public sector groups are increasingly putting climate action at the heart of their delivery practices, and climate change was seen as an opportunity to revisit quality of life for existing neighbourhoods, where as often landscape has tended to be a field that focuses on new developments (which is where most Landscape Practitioners are commissioned to work).

It was noted that the ongoing process of climate change would continue to raise the salience of urban climate adaptation measures, such as urban cooling, green and blue infrastructure, tree streetscaping, rainwater management and sustainable urban drainage, while in rural areas carbon sequestration and offsetting are likely to present both opportunities and challenges. In this context, an imbalance identified is that much of the mainstream discourse is focused on urban areas and housing development. However, most of the big landscape changes to deliver solutions will be in rural areas.

Interviewees expected housing-related landscape work to increase, with a **high demand for development and a national housing shortage** and a major gap between housing delivery and the UK Government's 300k homes target. Alongside this, **biodiversity improvements and nature recovery/restoration, and the new biodiversity net-gain requirements, are prominent drivers, bringing welcome focus and prioritisation but also challenges in implementation.**

Many concerns were raised about the capacity in local authorities to monitor the commitments being made. It was also noted that as the legislation is applied through the planning process, any places without significant development projects will not have any particular drive/requirement to act. Linked to this there is a growing trend of site acquisition to offset developments, which means biodiversity considerations are not required on development sites. This could be a significant opportunity for our rural areas, but also a significant challenge if not managed effectively. A particular concern was ensuring matched lifespan between offsetting deals and developments.

Alfred Place Gardens, London © LDA Design



## 'The Covid-19 Pandemic and the corresponding shift to hybrid work has led to a substantial rethink about the use of public space, access to green space and the importance of place-making.'

Interviewees noted this new focus is especially sharp in residential areas (where people spend more time than before), and commercial (where offices must now compete to retain workers). This has the potential to lead to a substantial rethink of the standards we set for access to green space.[8]

The pandemic sparked an explosion of interest in the 20-minute neighbourhood concept, and hybrid work has increased time spent in local communities. Interviewees expected this reshaping of urban landscapes around short and medium-range accessibility to be a major driver of future work and thought that this would likely be an important consumer preference for developers to account for.

**Government investment in cities and towns alongside major infrastructure schemes, which generate substantial work and attract substantial resources in the sector.** Multiple interviewees noted that smaller Government investment funds such as the Towns Fund, and the £2bn investment in active travel, had substantially increased demand for placemaking services. The growing demand for new developments across UK towns and cities continues to have a substantial impact on our experience and understanding of what landscape is. This is especially true when development plans explicitly fall within, or close to, protected natural sites.

Societal and developer preferences are shifting; active travel, walkability and active engagement with landscape are increasingly popular. This has accelerated post-pandemic but marks a broader long-term shift, from out of town and car-based business parks where Landscape plays a primarily ornamental role to contemporary mixed-use development. This, aligned to social shifts in use of space, such as designing landscape for accessibility needs, safe spaces for different groups, culturally appropriate design of shared community space, presents opportunity for landscape-led design.

8 Landscape Institute. Greener Recovery. (2020)

**The research has identified landscape as a significant sector in the national economy, with a pivotal role to play in delivering against critical policy agendas. However, there are challenges that need to be overcome.**

Nature Isn't Neat, Monmouthshire © Gwent Green Grid Partnership

# Positioning the landscape sector to respond

### Challenge 1: Lack of strategic coherence in the profession and no mainstream understanding of what landscape is, and why it's important.

Landscape is still too often considered to be subjective, often equated with beauty. There is no unified voice for the sector and there are huge gulfs in understanding of what landscape is and what landscape impact means. The voice is reasonably strong in design and planning development, and as such, that is therefore where the focus tends to be. The management, horticulture and conservation elements of the sector tend to be less in focus and this is evident in the different growth patterns of the sector over the last decade. Participants also noted a dissonance and potentially growing urban/rural divide in how the sector is described and developed.

Almost unanimously across interviewees engaged in this study, the relative low profile of the sector and the lack of widespread understanding of their work was raised as a challenge. For those working inside large projects or multi-disciplinary firms, landscape's low profile meant a struggle for resources against more recognised design disciplines like architecture and engineering. For smaller landscape-oriented practices, a lack of understanding of landscape was perceived to contribute to high cost pressures on businesses in the sector, especially from clients like local authorities and housing associations with limited room for financial manoeuvre.

Some stakeholders were critical of the brand and positioning of the sector, and terminology used around landscape. The term landscape was seen to have strong associations with domestic landscaping, shrubbery, and gardening. The fact that this was perceived as strongly negative by some is further evidence of the lack of unified voice within the sector, and a potential barrier to cross-industry fertilisation.

However, some recent examples of landscape-led masterplanning were highlighted as success stories which should be championed. Several practitioners interviewed highlighted local work done to raise the profile of the sector, working with local schools and careers services, but suggested that high commercial demands on landscape businesses meant that they were potentially ill-equipped to lead this engagement effort.

### Challenge 2: Limited interdisciplinary movement and collaboration, which exacerbates the lack of strategic coherence.

Although described as one in this document, the elements of the landscape sector tend frequently to work in silos. Most specifically, with planning and design, separate from management and maintenance, separate from protection and conservation. Research can also often quite distanced from application in practice, and participants noted that education content can also be quite dated. There is also a lack of consistent interdisciplinary interaction with other professions, transport planning, regeneration, water management, housing etc.

### Challenge 3: Poor workforce diversity and a stark gender pay gap.

The workforce is overwhelmingly white and male, with only the research, education and policy sub-sector reflecting an even gender balance. There are also significant gender wage disparities across the sector. Even when this is compared across job level, males consistently earn higher wages than females. This is despite females tending to generally be higher skilled the males, with 85% of female survey respondents have a masters or above compared to 73% for males.

Glassfields, Bristol © BD Landscape Architects

### Challenge 4: Limited entry routes, which restrict the development of a diverse pipeline of talent.

Entry routes are a real challenge and undoubtedly intensify the diversity challenge. Design and planning are highly qualified sub-sectors, 80% of respondents to the sector survey had a postgraduate qualification. This is in part due to high professional standards associated with the sector. Some interviewees noted approvingly the shift towards a competency framework as an alternative pathway to accreditation by the Landscape Institute specifically, which they thought could provide alternative routes into the sector; although there was some concern that this could impact course viability at key universities and other education providers. Other developments include the Landscape Institute's Choose Landscape recruitment programme. However, many noted the lack of non-academic entry routes to the more professionalised parts of the industry, which was seen as a potential barrier to experienced workers moving into the field from non-traditional backgrounds. For example, interviewees noted that the field would benefit from seeing more people move from maintenance or community engagement roles into design roles. This barrier was seen as both depriving the sector of much needed talent and alternate perspectives, which could prove valuable when considering additional, or long-term, uses for landscape.

This is a significant limiting factor to widening participation. Interviewees noted that it is very rare for someone to start in build, management or maintenance and follow a work-based route through to design and planning. But, arguably, this on-the-ground experience would enhance design and planning knowledge. Likewise, the level of applied and practical experience designers and planners have can be very limited.

Clearly defining and communicating what available jobs are and look like is imperative, but in the context of facilitating diverse and inclusive workforces, practical insight and opportunity are just as vital. This often seems to be the 'Catch 22' because without the accessibility and visibility of green careers, it's difficult to drive momentum at the rate required. The narratives attached to specific roles are how people personally engage – it is within those stories where people can see the future in themselves, and start the process of contributing to it.

Palace of Holyroodhouse Future Programme, Edinburgh © J&L Gibbons

## Challenge 5: A looming management and maintenance skills crisis.

The skills, resourcing and talent pipeline challenges mentioned were perceived to be particularly sharp with regards to ongoing management, maintenance and monitoring of landscapes. Interviewees noted a severe disconnect between some landscape professionals' design focus and the reality of long-term maintenance. Others discussed a disconnect between contemporary landscape best practice and traditional maintenance practice; particularly when it comes to biodiversity, where aesthetic considerations can clash with fostering animal and plant ecosystems.

Resourcing management and maintenance for the long term was also seen as a major challenge. One developer noted a lack of any real enforcement of biodiversity propositions from local authorities, who have substantial variation in their Landscape capacity, ranging from dedicated and effective teams to individual officers to zero. It should be mentioned that this crisis has been building for a long time, with a 2005 report from Historic England finding a "deficiency in specific skills at all levels within the sector".[9] However, this position has deteriorated particularly over the last decade of diminishing local government budgets, and reinforced by slow growth in this part of the workforce.

9 Historic England. Parks Need People. (2005)

£×

Wage disparities are prevalent across every job level.

**+£35k**

19% of males earn above £35k compared to 5% for females.

**+£35k**

58% of males earn above £35k compared to 48% for females.

**+£45k**

63% of males earn above £45k compared to 45% for females.

# Next steps

There is general assent in the sector that this is a moment of opportunity for UK landscape, and we hope that this report will aid in capitalising on it.

The landscape discipline's generational shift from aesthetic to multi-functional, the historic demands of climate change and biodiversity, the rising salience of landscape within the public realm, and the potential positioning of landscape at the centre of a coalition of allied disciplines offer an opportunity for the industry to reposition itself as a fundamental asset to the UK economy.

Landscape practitioners are perceived as having the holistic skillset required to deliver real change in the way the UK is designed and developed. However, several interviewees noted that this gathering momentum towards a landscape-led approach presents a challenge encapsulated in the question – is landscape ready to lead?

## Moving forward

This research sets out the scale of the challenge and the opportunity for landscape skills. The report is a call to action for partners to develop and coalesce around a plan to enable the landscape workforce to take a leading role in delivering a greener future for the UK.

Alongside the report, the Landscape Institute will be making the data available to others within the sector who can use it to further interrogate the issues and advocate for solutions. We welcome any feedback that can help us improve this for the future.

Part of the challenge of this research has been building a landscape labour market methodology that is fit for the future. Having done so, this research can provide the framework for further evidence-gathering in the future – and the LI will continue to collect and report data over the coming years.


Level 27 Panoramic Sky Gardens at Landmark Pinnacle © Gillespies

# Appendix

## Definitions

An important first step of our work was to define in measurable terms what the landscape sector contains. In the 2018 report, a single SIC code 71112 urban design and landscape architectural activities, was used to represent the sector.

In this report, we used a combination of SIC and SOC codes, capturing occupations in which people work rather than businesses in industries.

We have incorporated feedback of the project partners as well as the European Landscape Conventions landscape definition wheel and Landscape Institute competency framework to derive a final categorisation for the sector.

This categorisation was then overlayed with SIC and SOC classification systems to determine the most appropriate fit and where conditions on inclusion were needed. For example, SOC 1213: Managers and proprietors in forestry, fishing and related services was recognised as a core occupation but only when working in SIC8130: Landscape service activities. The table opposite, shows the final core occupations and whether conditionality was applied and how these are then arranged in Landscape sub-sectors.

**Figure 31** *SOC definition of sector and conditionality*

| SOC 2010 codes | Conditionality |
|---|---|
| 1211 Managers and proprietors in agriculture and horticulture | Include only 8130: Landscape service activities |
| 1213 Managers and proprietors in forestry, fishing, and related services | Include only 8130: Landscape service activities |
| 2119 Natural and social science professionals n.e.c. | Include 9412: Activities of professional membership organisations, 8411: General public administration activities and 7219: Other research and experimental development on natural sciences and engineering. |
| 2141 Conservation professionals | Include all. |
| 2142 Environment professionals | Include all. |
| 2431 Architects | Include all. |
| 2432 Town planning officers | Include all. |
| 2435 Chartered architectural technologists | Include all. |
| 3121 Architectural and town planning technicians | Include all. |
| 3122 Draughtspersons | Include all. |
| 3550 Conservation and environmental associate professionals | Include all. |
| 5113 Gardeners and landscape gardeners | Include all. |
| 5114 Groundsmen and greenkeepers | Include all. |
| 5119 Agricultural and fishing trades n.e.c. | Exclude 0220: Logging, 0311: Marine Fishing and 9319: Other sports activities |

**Figure 32** *SOC definition of sub-sectors*

| Sub-sector | SOC 2010 codes |
|---|---|
| **Build** | 1211 Managers and proprietors in agriculture and horticulture |
| | 1213 Managers and proprietors in forestry, fishing and related services |
| | 5113 Gardeners and landscape gardeners |
| | 5119 Agricultural and fishing trades n.e.c. |
| **Conservation** | 2141 Conservation professionals |
| | 2142 Environment professionals |
| | 3550 Conservation and environmental associate professionals |
| **Design** | 2431 Architects |
| | 3122 Draughtspersons |
| **Management** | 5114 Groundsmen and greenkeepers |
| **Planning** | 2432 Town planning officers |
| | 2435 Chartered architectural technologists |
| | 3121 Architectural and town planning technicians |
| **Research, education and training** | 2119 Natural and social science professionals n.e.c. |

## References

Specific references have been listed as footnotes within the report. Throughout the project we have drawn on a range of reports, which we would recommend for wider reading. These include:


CIEEM, A Crisis in Our Sector (2021)

Green Alliance, Closing the UK's green skills gap (2021)

Deloitte, Institute of Environmental Management and Assessment, A blueprint for green workforce transformation (2022)

Design Council, People, Places and Economic Value (2022)

Defra, Assessment of the skills and capacity of local government to deliver Biodiversity Net Gain (2021)

Environmental Audit Committee, Green Jobs (2021)

Groundwork London, Parks for London, London Green Space Skills Hub (2022)

Historic England, Heritage Labour Market Intelligence Toolkit (2021)

Historic England, The Skills Shortage in Parks (2005)

HM Government, 25 Year Environment Plan (2018)

HM Government, Green Jobs Taskforce report (2021)

HM Government, Levelling Up the United Kingdom (2022)

HM Government, UK Climate Risk Assessment (2022)

HM Government, The National Adaptation Programme (2018)

Homes England, Introduction to landscape-led design and planning (2022)

Institute of Chartered Foresters, Can't see the skills for the trees (2021)

Landscape Institute, Greener Recovery (2020):

Landscape Institute, Landscape for 2030 (2021)

Landscape Institute, Achieving Sustainable Drainage (2019)

Ornamental Horticulture Roundtable Group, Growing a Green Economy (2021)

Policy Exchange, Nature and the City (2021)

Natural England, The Economic Value of Green Infrastructure (2008)

Royal Town Planning Institute, Resourcing Public Planning (2019)

UK Green Building Council, The Value of Urban Nature Based Solutions (2022)




## Glossary

### The following specialist terms are used throughout this report;

**Biodiversity net gain:** An approach to development and/or land management that leaves nature in a measurably better state. The Environment Act will require that a new development delivers a minimum 10% increase in biodiversity.

**Climate change adaptation:** The actions taken to manage the unavoidable impacts of climate change. Adaptation seeks to moderate harm or exploit beneficial opportunities.

**Ecosystem services** are the benefits to people provided by nature including; provisioning services (e.g. food, water, wood, construction materials), regulating services (e.g. water quality, flood regulation, erosion protection, carbon storage, noise reduction, air quality regulation, cooling and shading), supporting services (e.g. habitats, thriving plants and wildlife, pollination) and cultural services (e.g. access to nature, sense of place, aesthetic value, recreation and education).

**Green infrastructure:** A network of multi-functional green and blue spaces and other natural features, urban and rural, which is capable of delivering a wide range of environmental, economic, health and wellbeing benefits.

**Gross Value Added (GVA):** a measure of the total value of goods and services produced within a sector of the economy

**Landscape** is the intersection between the man-made world and the natural environment. Core Landscape Activities are the planning, design, build, management, and conservation of spaces. Landscape Professionals carry out these activities, although they not the only ones to do so.

**Landscape architecture** is designing the outdoor environment – landform, vegetation, water, buildings and paving – to harmonise with man-made infrastructure, such as buildings and roads.

**Landscape planning** is the development and application of strategies, policies and plans to create successful environments, in both urban and rural settings, for the benefit of current and future generations.

**Landscape maintenance** means activities carried out to maintain landscapes, plants, turf, and built environment elements.

**Landscaping** is the activity of designing or improving gardens and the surroundings of buildings to make them more attractive. It is distinct to Landscape as a discipline.

**Natural capital:** The elements of nature that directly or indirectly produce value for people, including ecosystems, species, freshwater, land, minerals, air and oceans, as well as natural processes and functions.

**Net Zero** is an ongoing process to reduce carbon emissions and increase carbon uptake from present detrimental levels. The UK Government has set the goal of achieving Net Zero by 2050.

**Standard Industrial Classifications (or SICs):** A classification system for different industrial activities used to measure the economic performance of sectors.

**Standard Occupation Classifications (or SOCs):** A classification system for different classify occupations in the economy.

**Sustainable Drainage Systems, SuDS:** Sustainable drainage systems slow the rate of surface water run-off and improve infiltration, by mimicking natural drainage in both rural and urban areas. This reduces the risk of 'flash-flooding'.

**Urban design** is the design of towns and cities, streets and spaces and involves the design of buildings, groups of buildings, spaces and landscapes.

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