

THE EMPLOYMENT AND INCOME SURVEY 2016 RESULTS

1. Executive Summary

The 2016 Landscape Institute Employment and Salary Survey ran from 4 October 2016 to 8 November 2016. It was promoted to all LI members through two dedicated emails and three @TalkLandscape tweets.

1.1 Response rate and demographics

The survey received 976 complete responses from 4676 members mailed (20.8%), plus an additional 57 partial responses bringing total participation to 1033 (22%). This is more than 9% higher than the 619 (11.6%) complete responses received in 2015 and the best response rate since 2012. The analysis in this report is based on the complete responses.

Following the low response rate in 2015, the timing of the survey was brought forward to October, to avoid the pre-Christmas period, and it was promoted to members by dedicated emails with bespoke messages emphasizing the benefits to members of completing the survey. In addition, as a result of feedback, the survey was overhauled, removing some of the questions added in 2015, clarifying questions that respondents found confusing and making the survey easier and quicker to complete. This has had the desired effect, and it is intended to conduct the survey at the same time each year in future.

Of the respondents, 680 were CMLi (69.7%), 14 Fellows (1.4%), 249 Licentiates (25.5%), 21 students (2.1%), and 7 Affiliates (0.7%). This is similar to the balance of LI membership, though CMLi are over-represented by 9.7% and students, affiliates and retired members under-represented.

The gender balance was 470 women (48.2%) and 506 men (51.8%). This is similar to 2014 when 51.3% of respondents were men; more men participated this year than last (47.5%). This compares to a gender balance of 45% women and 55% men in the overall membership. As last year, the majority of respondents were aged 26-45 (61%) with a further 22% aged 46-55, compared with an average age of 46 for LI members. Therefore, the survey slightly more reflects the situation of women and younger members.

1.2 Headline findings

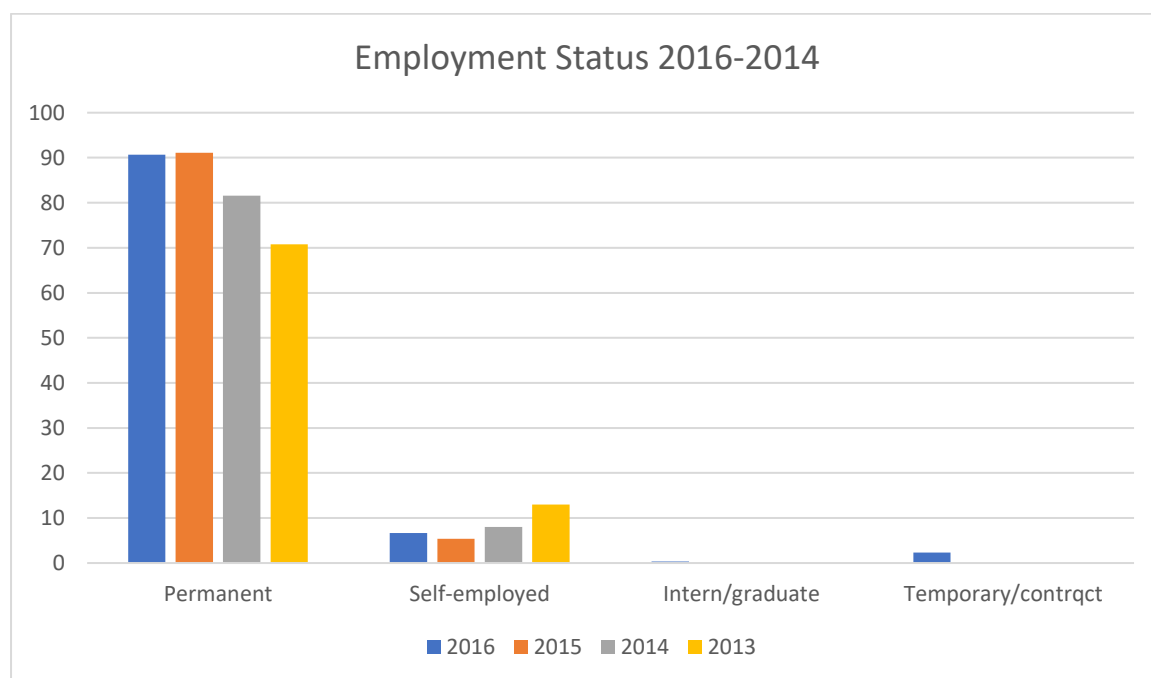
- The proportion of respondents in permanent employment has continued to rise, up from 71% in 2013 and 82% in 2014 to 91% in 2015 and 2016.
- Unemployment among members remains below 3%.
- The percentage of respondents saying they practice Landscape Science has risen sharply from 2% to 15% this year.
- 73% of respondents work in private practice, and the percentage who work for a non-LI registered practice has continued to fall.
- Nearly 25% of Chartered members earn above £50,000 compared to around 20% in 2015 and 2014, although £30-39.9K remains the predominant salary band with 41% of CMLI earning in this range.
- The majority of Licentiates earn £20,000-29,999, but the proportion of those earning over £30,000 has gone up from 23% in 2015 to 35% this year.
- Pay for men continues to outstrip pay for women landscape professionals at higher levels. While 23% of male respondents earn above £50,000, only 10% of women do so, and the discrepancy persists among CMLI: 32% of men compared to 13% of women. Only 1 woman earns over £100K compared to 19 men. Concern about pay equality was expressed by men and women in the comments.
- 60% of those working at Professional/Consultant level earn between £27,500 and £37,499, with only 3.4% earning over £50,000.
- Salaries for those at MD/Principal/CEO level are more widely spread, from under £14,000 to over £100,000, but 23% of them earn £40,000-£49,999.
- Senior Managers predominantly earn between £40,000 and £54,999.
- Over half of Team Leaders earn between £30,000 and £39,999.
- Over half of respondents said they had received a pay rise this year, while 37% said their pay had remained about the same. Only 6.8% experienced a decrease.
- Men were more likely than women to receive a large pay rise, with 27% of men getting an increase of over 5%, compared to 21% of women.
- Growth has slowed slightly this year, with 43% of respondents reporting an increase in the size of their organisation compared to 46% last year. Over three-quarters of those working for a local authority have seen a decrease, and other public employers have also shrunk.
- Morale in the industry appears to be a little lower than last year, with those reporting morale to be high or positive in their organisation dropping from 38% to 32%.
- Comments reveal a problem with recruiting staff, anxiety about landscape education and concern about the impact of Brexit on both commissions and recruitment.
- Nearly a third of comments talk about the problem of low pay in the industry, particularly given the long training and high levels of responsibility and technical knowledge required, and a culture of staff being expected to do unpaid overtime.

2 Nature and mode of employment

2.1 Employment

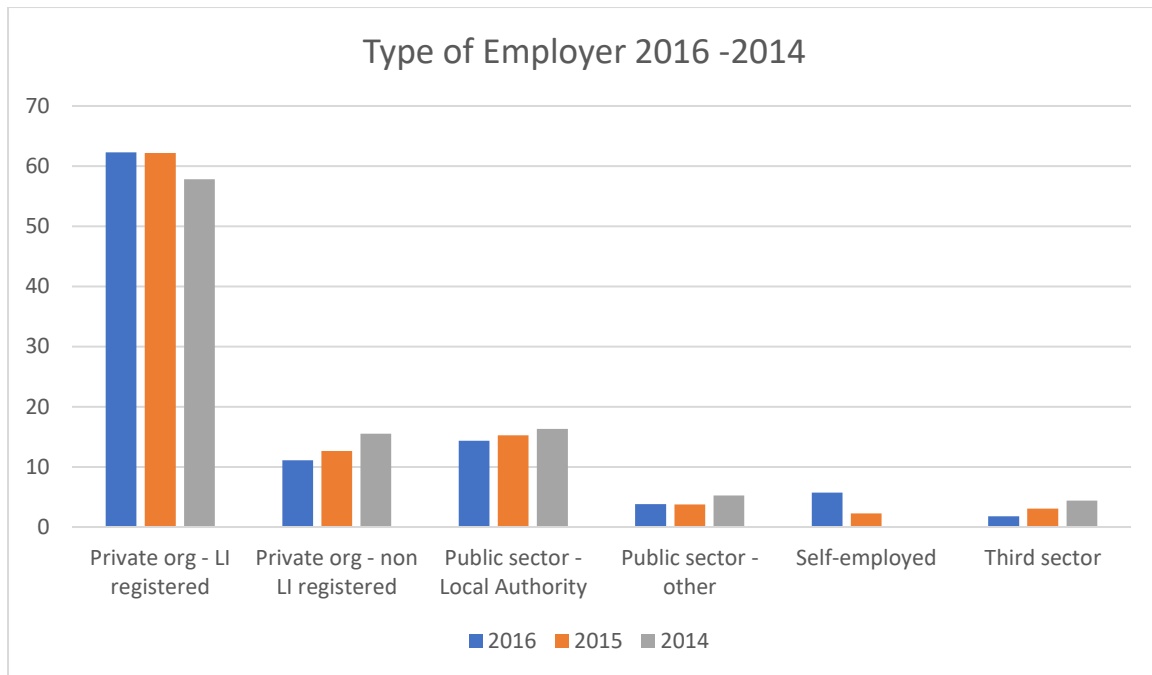
2.1.1 Status

The percentage of employed respondents who have permanent roles is now 90.68%, just below 91% in 2015, though ahead of the 81.6% in 2014. Only 2.97% of respondents are currently unemployed, compared to 2.69% in 2015.



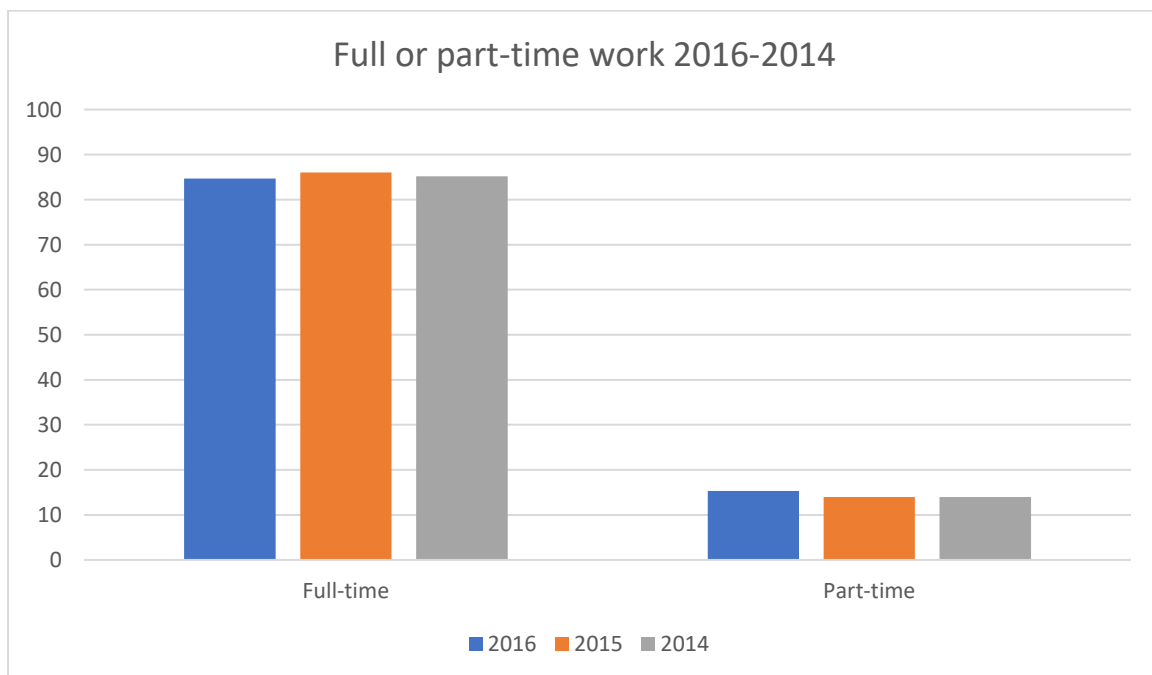
2.1.2 Type of employer

The percentage of respondents who work in private organisations that are LI registered remains at just over 62%, up from 57.8% in 2014. The percentage of those working in non-LI registered practices has dropped from 15.5% to 11% since 2014. Local authority employment has continued its decline, down from 16.3% to 14.3% since 2014, as has the third sector. A greater proportion of respondents are self-employed this year at 5.7% compared to 2.3% last year. The proportion working in Public sector other has remained at 3.8% since 2015. Academics (not on table) made up 0.95% of respondents, similar to last year's 0.8%.



2.2 Full and part-time employment

The proportion of respondents working full-time has remained roughly steady over the past three years, dropping back slightly to 84.7% in 2016 from 86% last year.



The percentage of women working part-time has gone up from 21.7% to 26.4%, while that of men has remained steady at 4.3%. 4% of part-time workers work in a job share. 16% of women and 14% of men working part-time would like to work more hours if they were available.

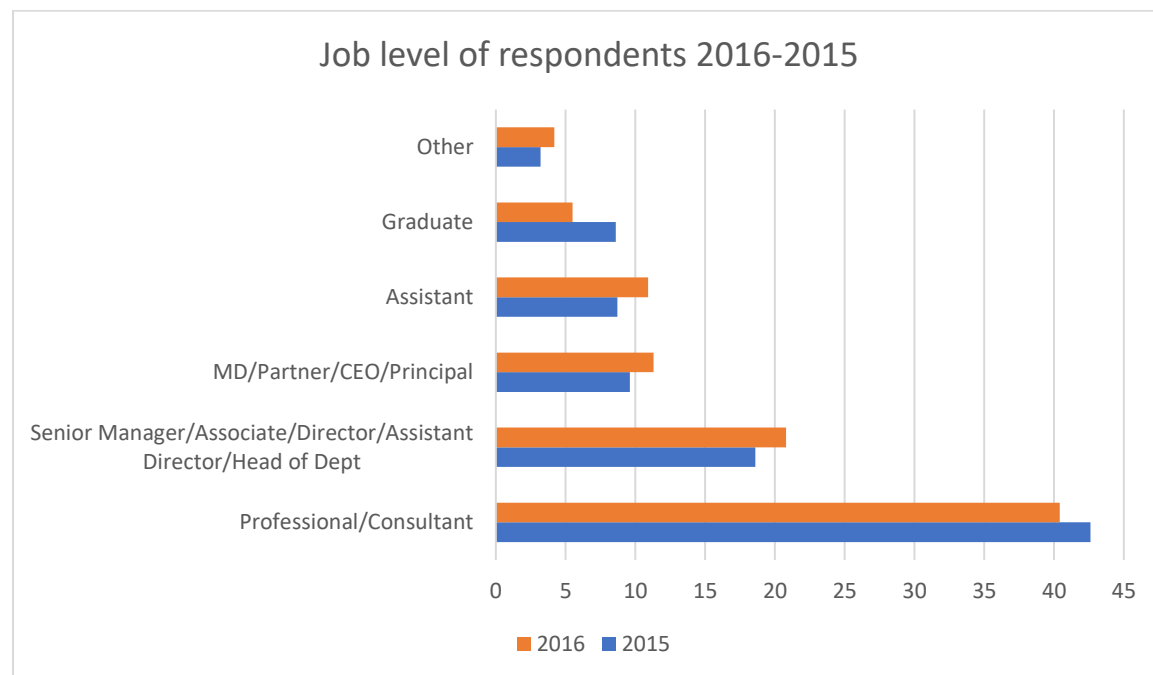
2.3 Unemployment during the last 12 months

12.4% of respondents had been unemployed at some point between October 2015 and September 2016, up from 10.7% in 2015. Only 10.4% of CMLI had experienced unemployment (this figure includes 2 Fellows) compared to 16% of Licentiates and 28.5% of Students, though these figures have halved from the levels in 2014 of 32% and 60% respectively.

Of the 29 respondents who are currently not employed, only 5 (17.2%) are unemployed, with a further 17% each being full-time students or taking a career break, 20.7% retired and 24% other (such as semi-retired or relocated). 31% have not been employed for less than 3 months, while 24% have not been working for more than 3 years, a more favourable position than in 2014.

2.4 Job levels of respondents

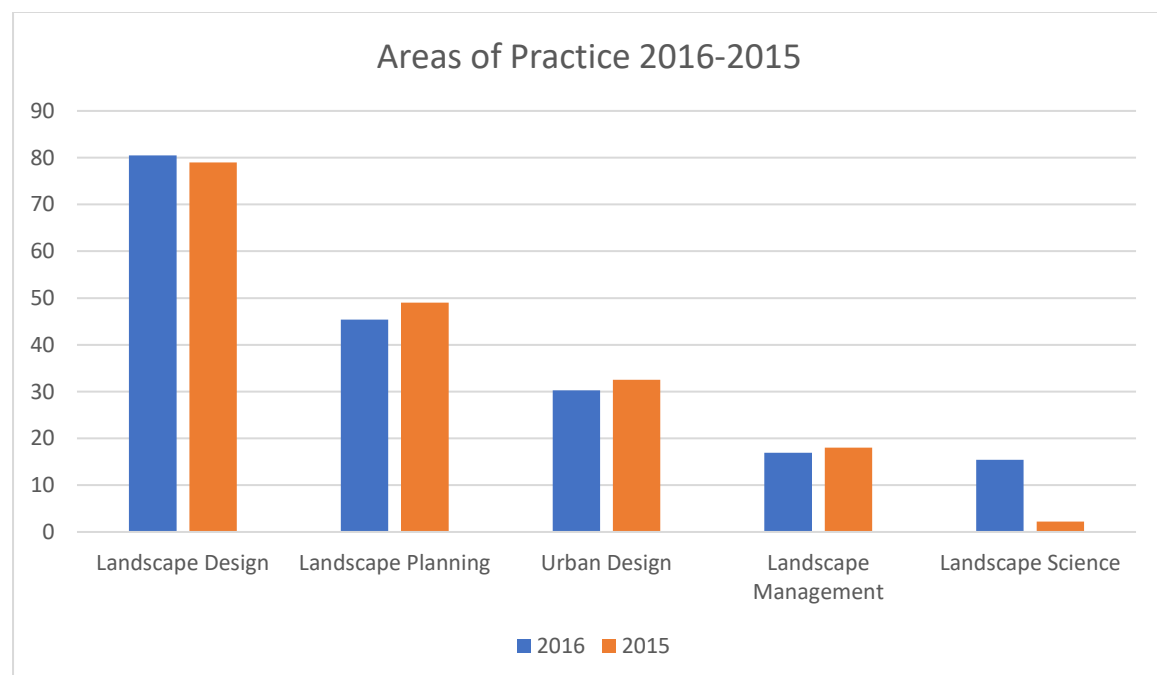
The largest group of respondents, 40%, identified themselves as Professional or Consultant, a little lower than last year's 43%. The proportion of those at the Senior Manager, were higher at 21% compared to 19% last year, as were Team Leader and MD/CEO both at around 11%. Assistants formed a lower percentage at 6.9% compared to 8.7% in 2015, as did Graduates at 5.5% compared to 8.6%.



2.5 Areas of practice

The Landscape Institute has five Areas of Practice, the main broad spheres of practice in the landscape profession. Members were asked to tick all of the areas of practice that applied to them in order to gauge the broad range and combination of areas that landscape professionals engage in.

Landscape Design scores even more highly, being practiced by 81% of respondents. Landscape Planning has dropped a little from 49% to 45%, as have Urban Design (33% v. 30% in 2015), and Landscape Management (17% v. 18%). Most striking is the sharp increase in the practice of Landscape Science from 2% to 15%.



Other areas of practice were cited by 8% of respondents, including LVIA and EIA, historic landscapes, environmental assessment or planning, engineering, flood and water management, green infrastructure, ecology, garden design, arboriculture, conservation, placemaking, masterplanning, public realm, housing development or regeneration, education, hospitality, photomontage, project management and multi-disciplinary work.

3 Current salary for landscape professionals

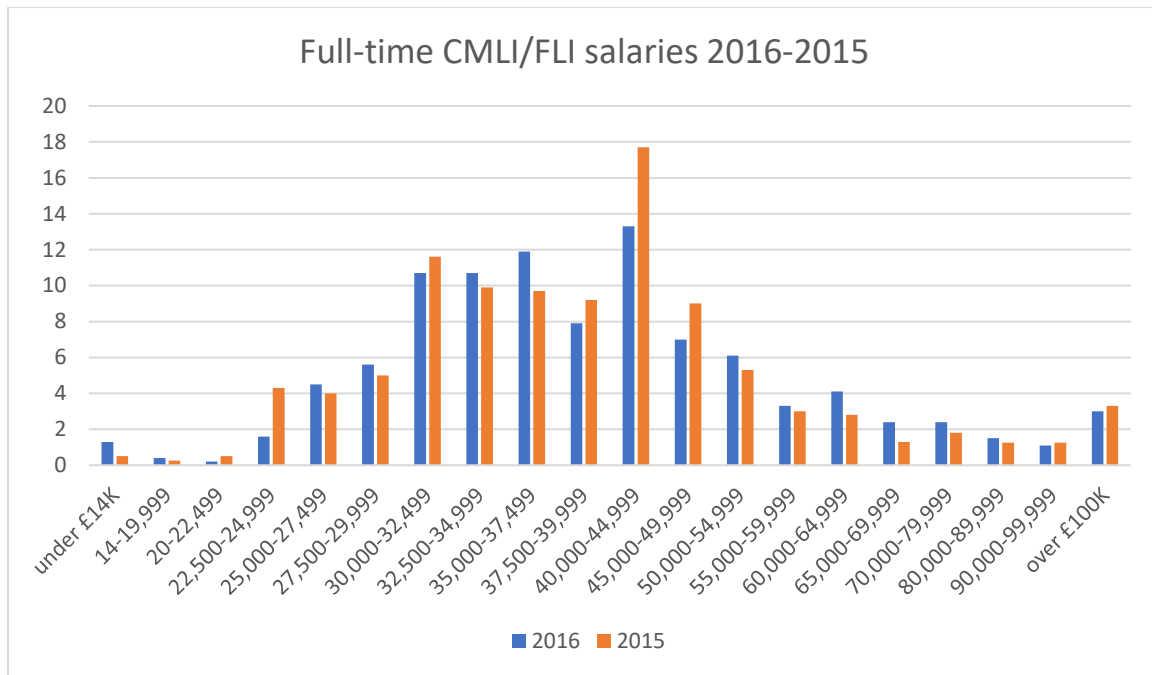
3.1 Full-time salaries

Due to changes in the salary bands in the survey over the last two years, the 2015 figures have been adjusted to match this year's bands, and the 2014 figures do not give as detailed a breakdown. The figures for CMLI salaries in the table include FLI.

	Chartered 2016	Chartered 2015	Chartered 2014	Licentiate 2016	Licentiate 2015	Licentiate 2014
Under £14,000	1.3%	0.5%	1.8%	1.6%	0%	1.8%
£14,000-19,999	0.4%	0.25%	0.8%	3.7%	3.1%	3.4%
£20,000-22,499	0.2%	0.5%	£20-24.9	9.4%	15.1%	£20-24.9
£22,500-24,999	1.6%	4.3%	3.3%	16.3%	23%	47.9%
£25,000-27,499	4.5%	4%	£25-29.9	18.8%	28.8%	£25-29.9
£27,500-29,999	5.6%	5%	12%	14.7%	23.4%	27.8%
£30,000-32,499	10.7%	11.6%	£30-39.9	12.7%	9.8%	£30-39.9
£32,500-34,999	10.7%	9.9%	41.9%	5.7%	4.9%	14.4%
£35,000-37,499	11.9%	9.7%		1.6%	2.7%	
£37,500-39,999	7.9%	9.2%		2%	2.4%	
£40,000-44,999	13.4%	17.7%	£40-49.9	4.9%	0.6%	£40-49.9
£45,000-49,999	7.2%	9%	19.6%	5.7%	1.8%	1.6%
£50,000-54,999	6.1%	5.3%	£50-59.9	1.6%	0.6%	£50-59.9
£55,000-59,999	3.3%	3%	8.1%	0.4%	0%	1.6%
£60,000-64,999	4.2%	2.8%	£60-69.9	0.4%	0%	£60-69.9
£65,000-69,999	2.5%	1.3%	4.6%	0.4%	0%	0%
£70,000-79,999	2.5%	1.8%	1.9%	0%	0%	0.5%
£80,000-89,999	1.6%	1.25%	1%	0%	0%	0.5%
£90,000-99,999	1.3%	1.25%	1%	0%	0%	0%
Over £100,000	3.3%	3.3%	3.9%	0%	0%	0.5%

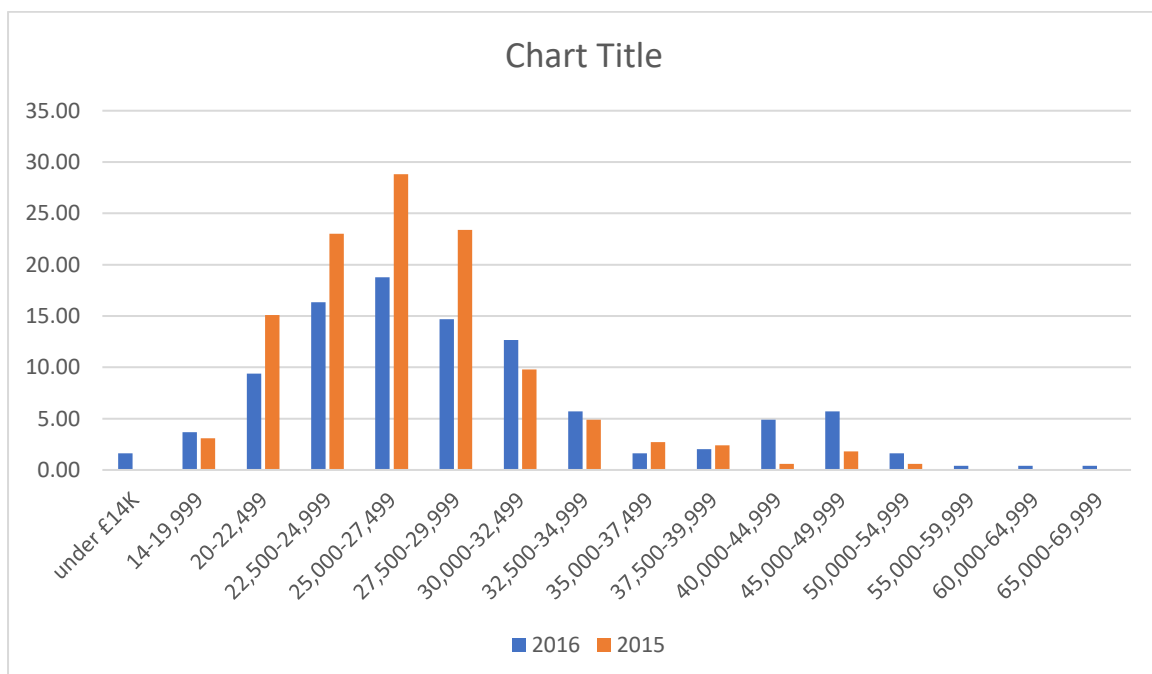
3.1.1 Chartered members' salaries

The survey shows that nearly 25% of CMLI/FLI now earn above £50,000, compared to around 20% earning at that level in 2014 and 2015. As in the last two years, 41% of CMLI earn between £30,000 and £39,999. The percentage earning less than £30,000 has dropped a further point from 14.6% last year, and is now over 4% less than 2014 at 13.5%.



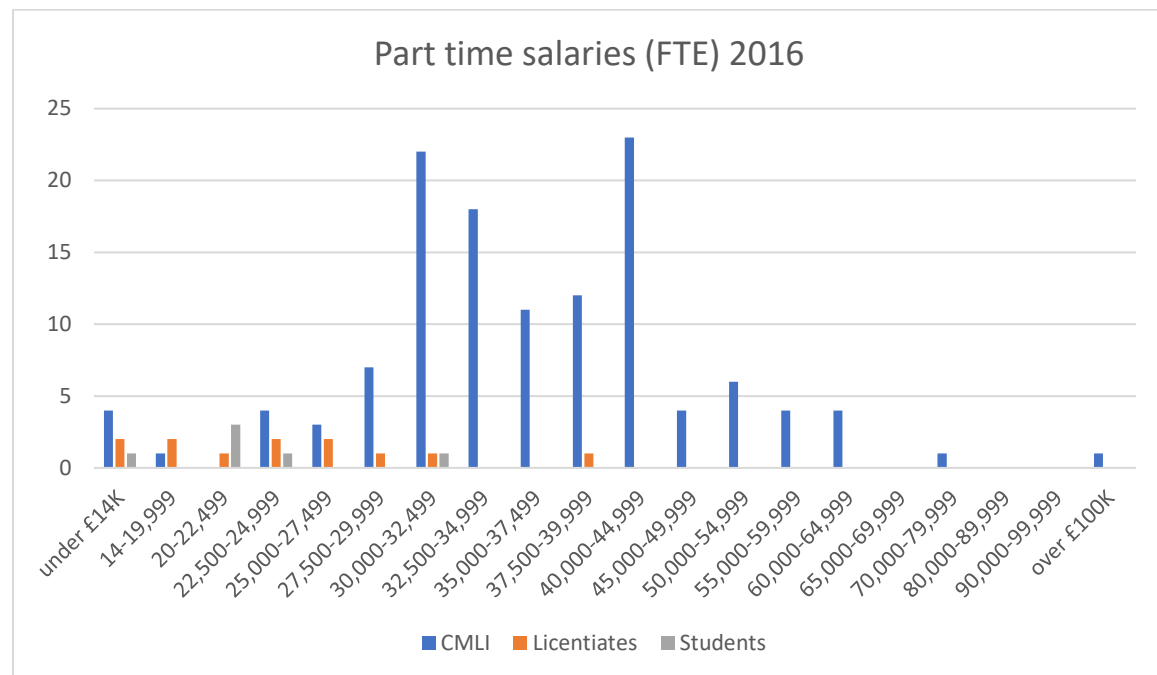
3.1.2 Licentiate salaries

The majority (59%) of Licentiates earn £20-29,999, with 35% between £22,500 and £27,499. However, this year a further 35% of Licentiates earned over £30,000, up from 23% last year.

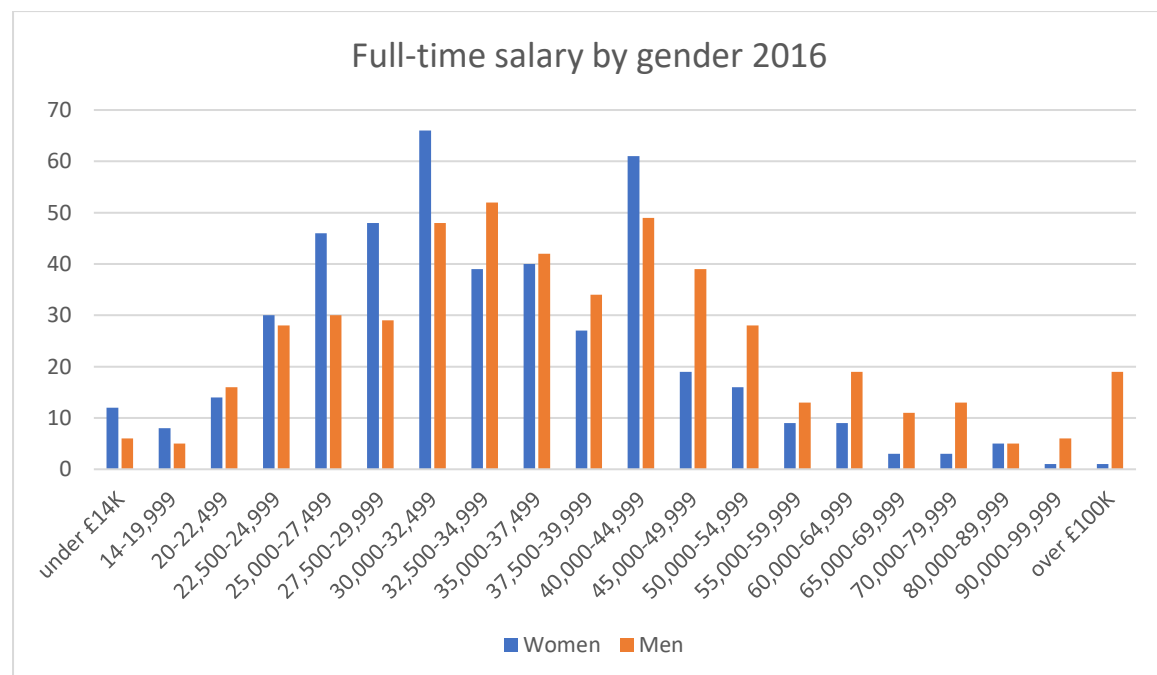


3.2 Part-time salaries

The question about part-time salaries has caused some confusion in the past, so this year members were specifically asked to give their full-time equivalent salary to allow a comparison with full-time salaries. Half of CMLi working part-time earn between £30,000 and £39,999 compared to 41% of full-time employees, and only 13% earn over £50,000. Most part-time Licentiates and Students earn less than £27,500.



3.3 Pay and gender



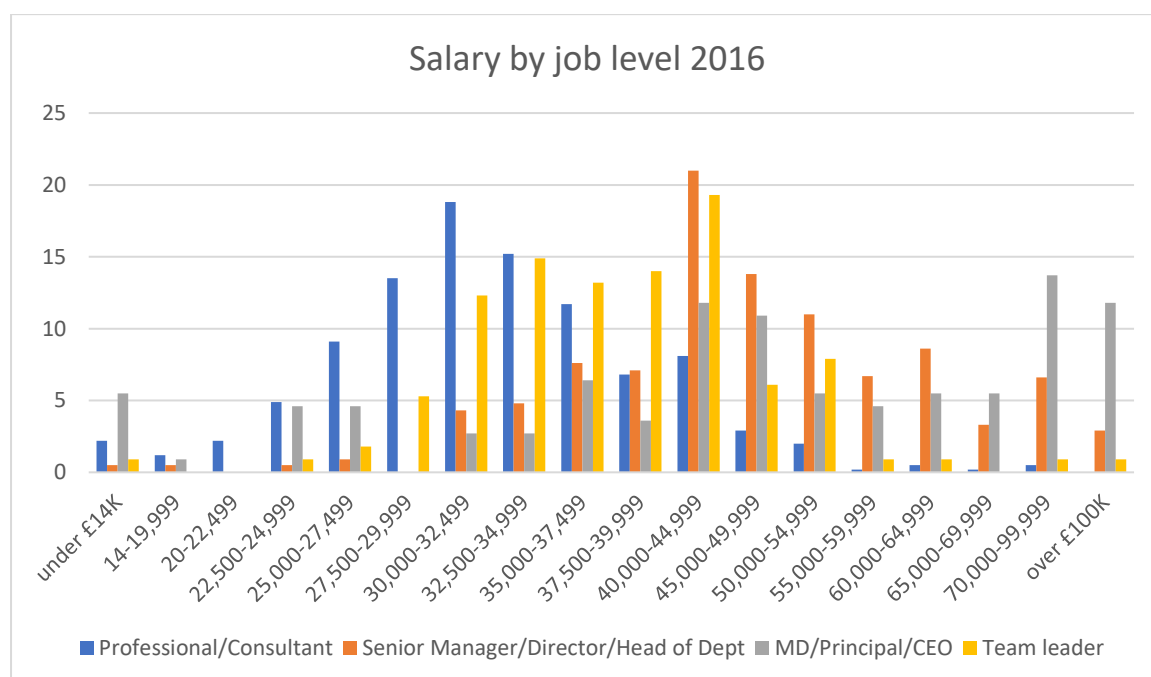
The above table shows that full-time women's salaries show a similar pattern to those of part-time workers, all but 14 of whom are women, suggesting that the pay discrepancy between women and men is linked to gender rather than the nature of part-time roles.

Over twice as many men earn over £50,000, with 23% earning at this level, compared to only 10% of women, while 19 men (nearly 4%) earn over £100,000 compared to only 1 woman. This ratio is slightly better than in 2015, when 18% of men earned over £50,000 compared to 6% of women, but remains similar to that in 2014 when the figures were 27% and 11% respectively.

Looking at CMLI respondents who work full-time, 49% of men earn over £40,000, compared to 37% of women. While a similar proportion of women and men earn between £30,000 and £39,999 (43% and 41% respectively), 20% of women earn below this salary band, while only 6% men do.

3.4 Pay by job level

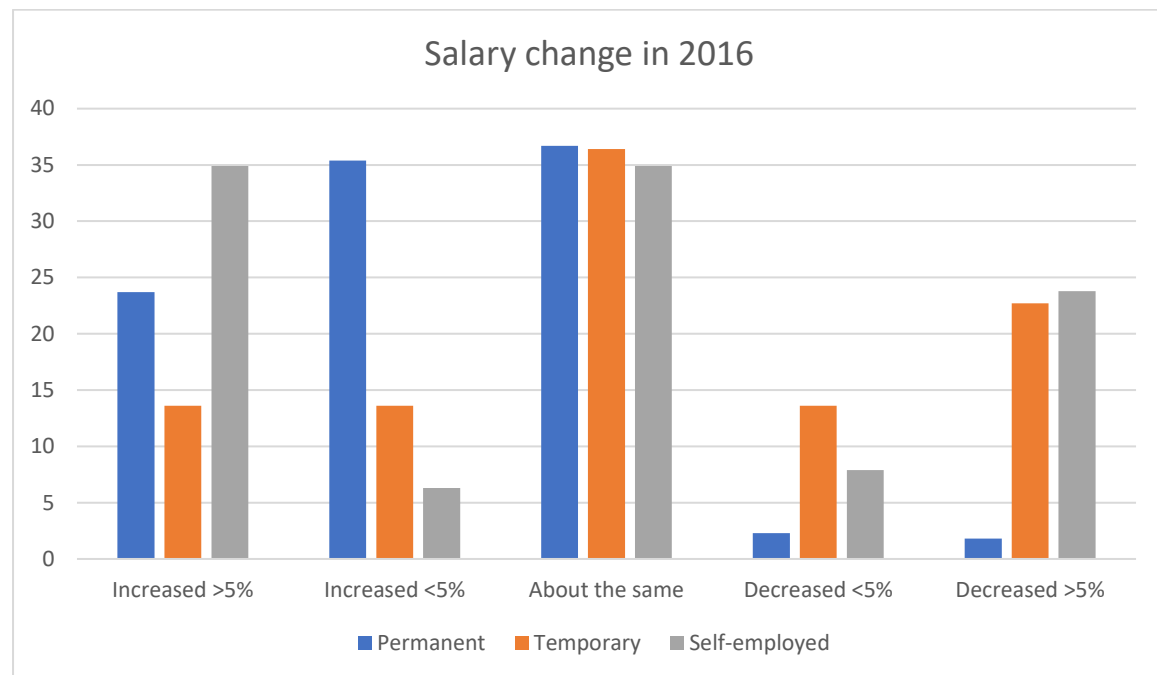
Professional/Consultant was the largest job category chosen by 42% of respondents. The most common salary was £30,000-32,499, while nearly 60% of those working at this level earned between £27,500 and £37,499. Only 3.4% earned over £50,000. At MD/Principal/CEO level the most common salary is between £40,000-49,999, with 23% earning in this bracket. However, there is a very wide spread of salaries, from 5.5% earning less than £14K to 12% earning over £100K. Senior Managers earn between £40,000 and £54,999, with 21% earning £40,000-£44,999. Most Team Leaders (54%) earn between £30,000 and £39,999, with a further 19% earning £40,000-44,999, the largest single salary band. More than half (56%) of Assistants earn between £22,500 and £27,499, while 57% of Graduates earn £20,000-£24,999.



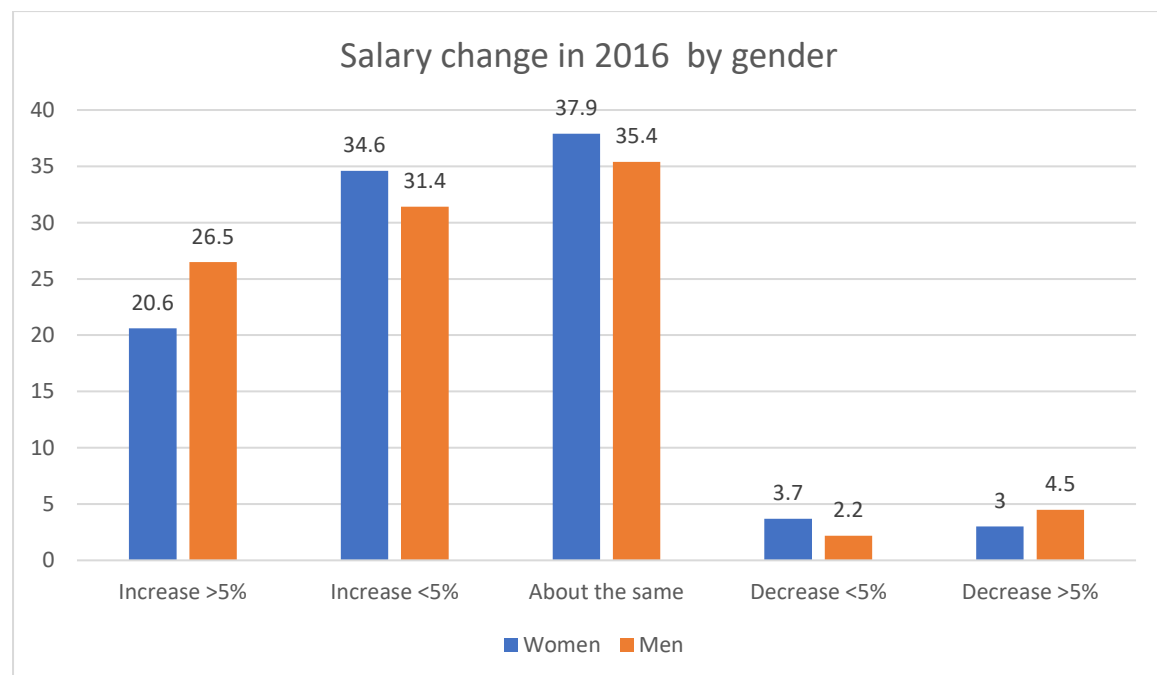
4 Salary changes in the Landscape Industry

4.1 Salary change in the last 12 months

Nearly 37% of respondents said their pay had remained about the same over the past year. A third said their pay had increased by less than 5% in the past year, while a further 24% had received a rise of over 5%. Those in permanent roles were more likely to have a pay rise. Overall, 6.8% experienced a decrease in pay.



4.2 Salary change by gender

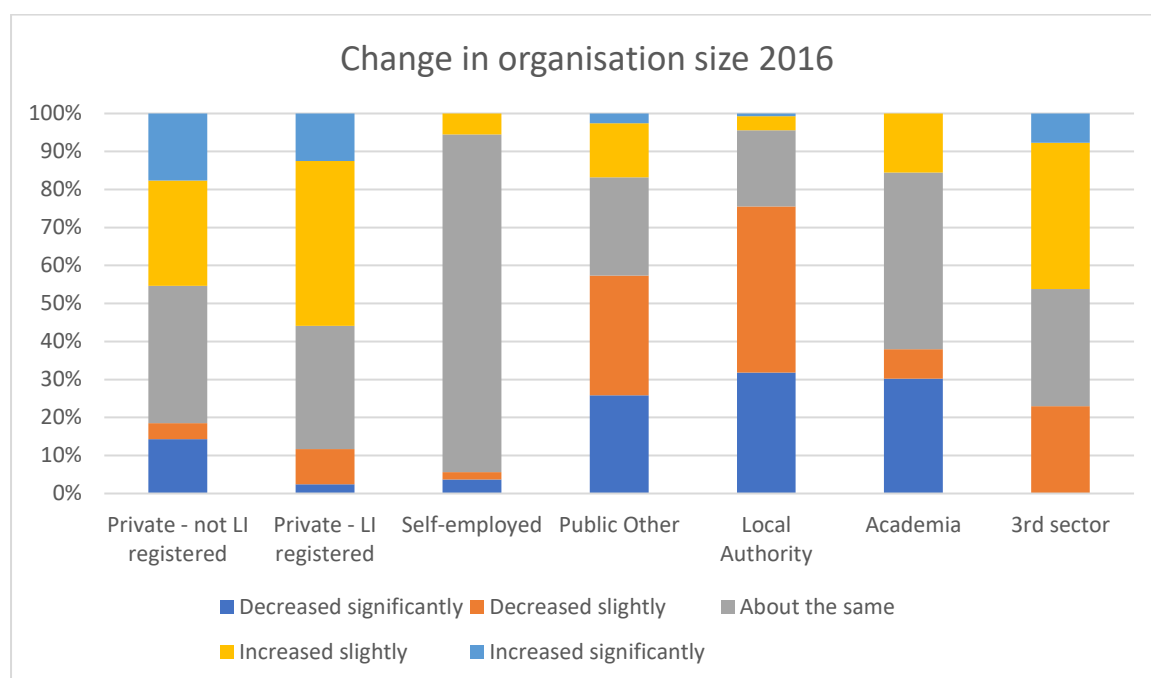


Men were more likely than women to receive a large pay rise, with 27% of men receiving an increase of over 5% compared to 21% of women. 38% of women said their pay had stayed about the same and 35% reported an increase of less than 5%, compared to 35% and 31% of men, respectively.

5 Changes to employers in the Landscape industry

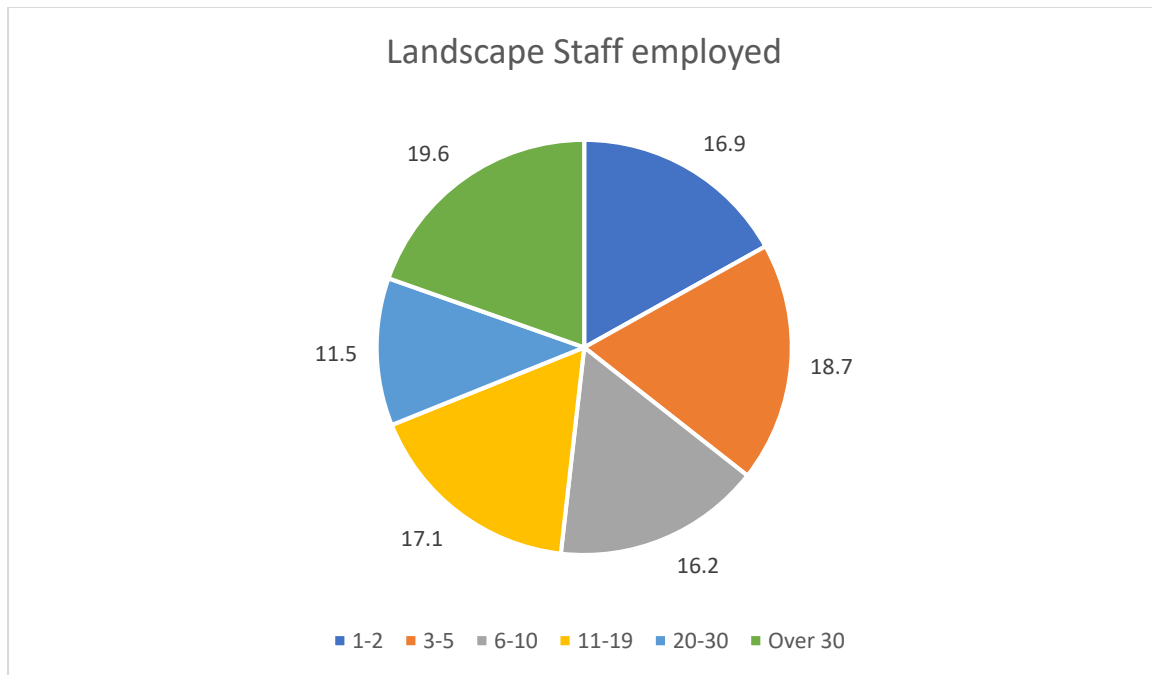
5.1 Change of organisation size

Growth has slowed slightly this year after a rising trend over the past couple of years, with 43% of respondents reporting that their organisation has grown, compared to 46% last year. Over three-quarters of those working for a Local Authority have seen their organisation decrease slightly (44%) or significantly (32%) in the past year, with only 4% seeing any growth. Other public employers have also shrunk, with 55.5% seeing a decrease. In contrast over half (55.8%) of Private LI registered organisations have seen growth compared to 45.3% of Private non-LI registered firms. Most self-employed respondents (89%) have seen their business stay about the same. Results for Academia and the Third sector reflect responses from 13 people in each category, and there are 36 Public Other and 54 Self-employed respondents, so these trends may be affected by small sample size.



5.2 Size of landscape function within organisations

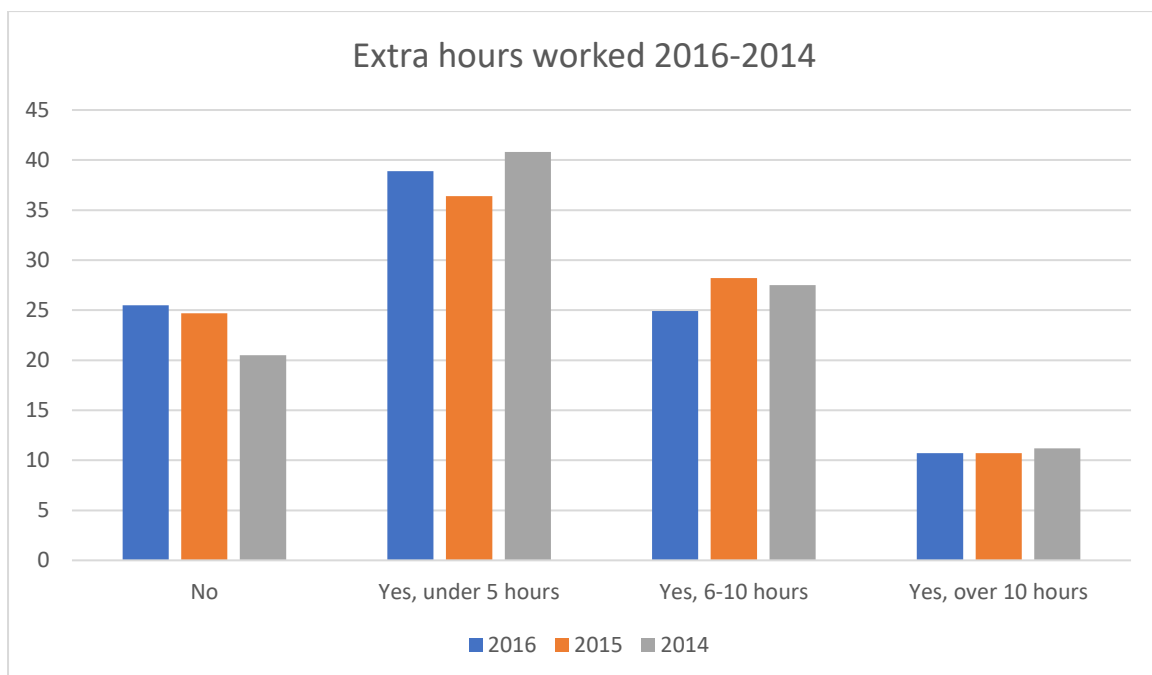
The size of the landscape function within organisations shows a very even spread, with those employing over 30 staff marginally the largest segment at 19.6% of respondents, followed by those employing just 3-5 landscape staff.



6 Working conditions

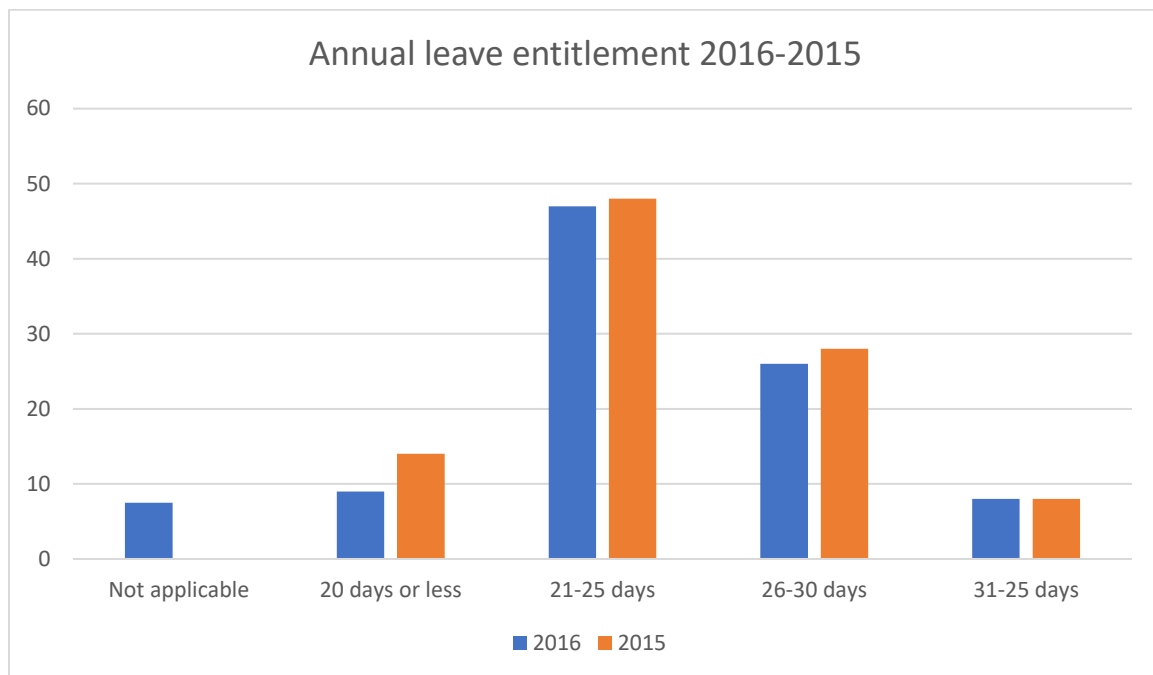
6.1 Working hours

The number of hours worked in excess of contracted hours follows a similar pattern to last year, with a slight increase in those not working overtime, and a reduction in those working an extra 6 -10 hours from 28% in 2015 to 25% this year, and a correspondingly increase in those working under 5 hours extra.

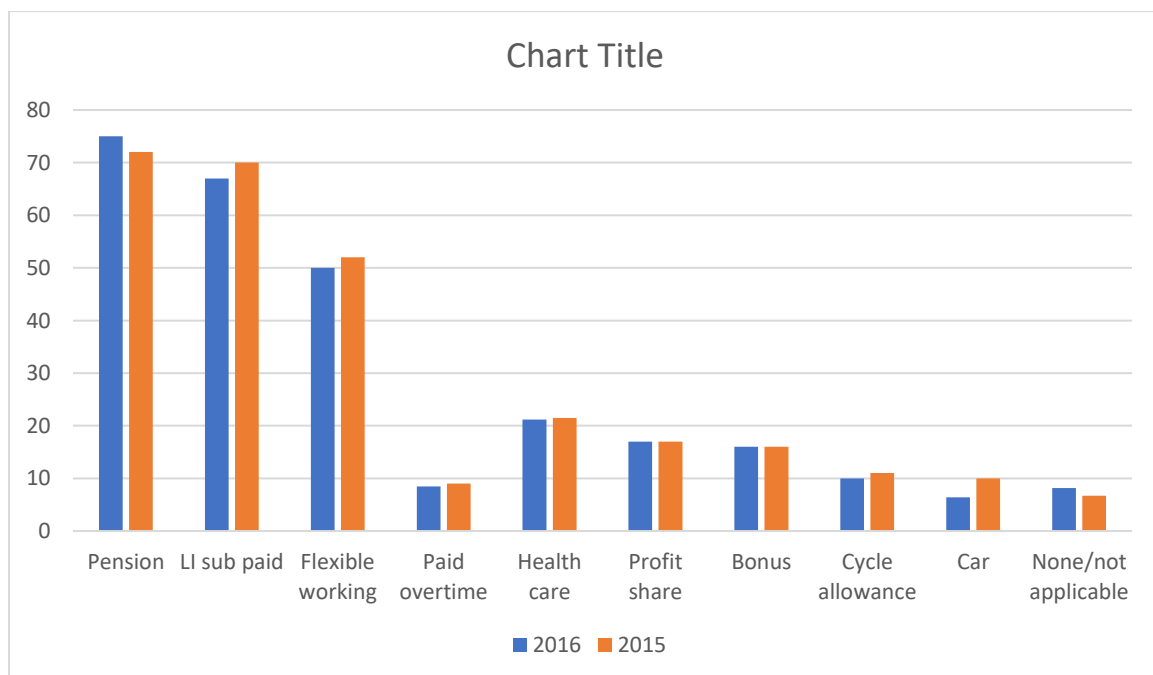


6.2 Annual leave entitlement

This question was introduced last year; following feedback from those who are self-employed or freelance we included a 'Not applicable' option this year. Otherwise the pattern of annual leave is similar to last year, with nearly half of employees (47%) getting 21-25 days off, and a further 26% getting 26-30 days leave.



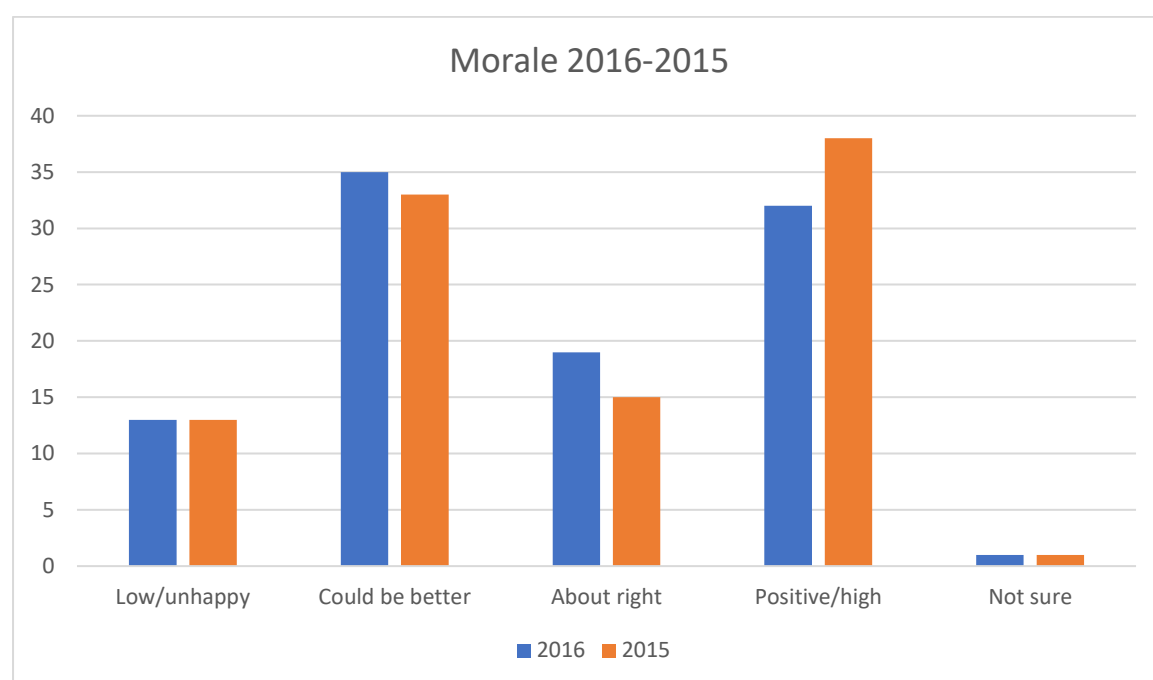
6.3 Other benefits



The survey of other benefits shows a small increase, from 72% to 75%, in the percentage of respondents receiving a pension. Recipients of a company car have dropped from 10% to 6%, and there is a 2% decrease in those benefiting from flexible working. A slightly lower percentage of respondents had their LI subscription paid by their employer.

6.4 Morale

Morale in the industry appears to be a little lower, with those reporting that morale is high or positive in their organisation dropping from 38% to 32%, with an additional 2% saying that morale could be better, and an extra 4% choosing 'About right'.



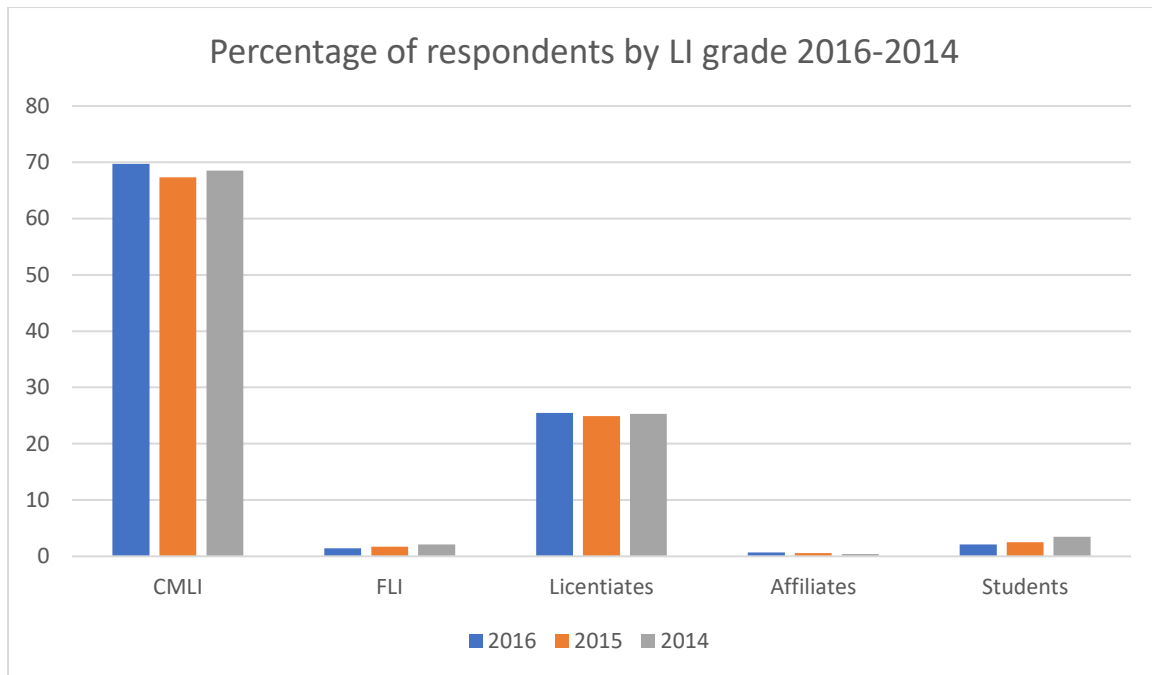
7 Respondent profile

7.1 LI membership

The survey was completed by slightly more CMLI/FLI members than last year (71% v 69%) while just over 25% of respondents were Licentiates. The percentage of students completing the survey has dropped from 3.5% in 2014 to 2.1% in 2016. 1.3% of responses came from academics.

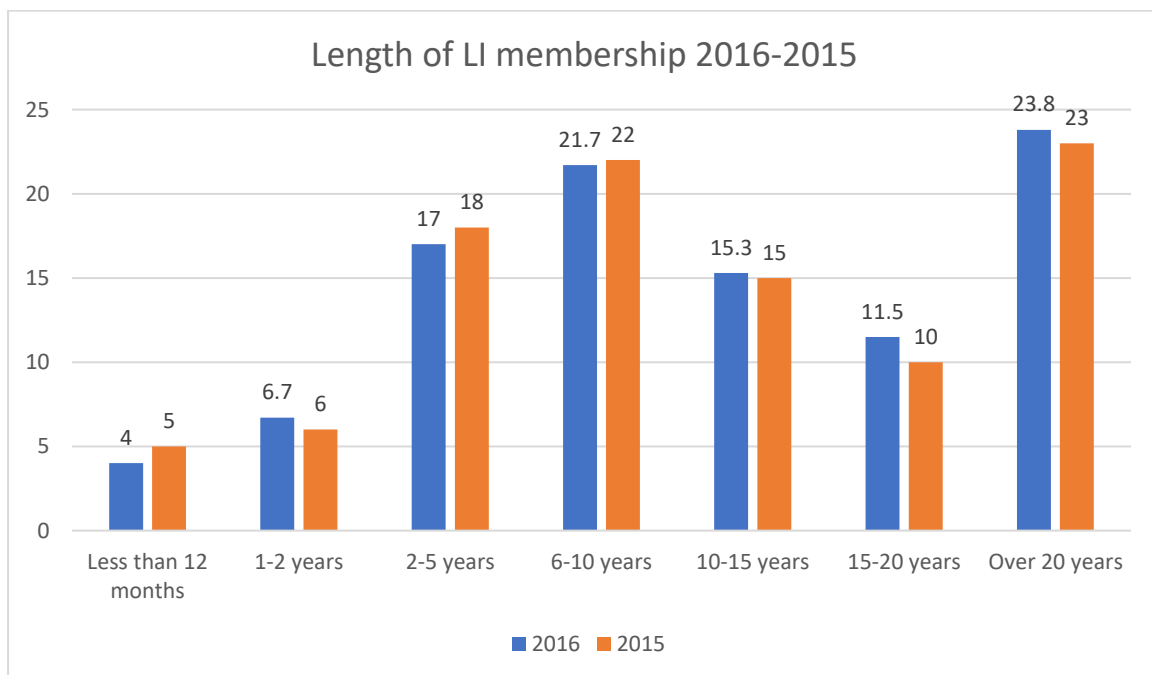
This compares to figures for the overall membership as follow:

CMLI 60%, FLI 1.7%, Licentiate 24%, Student 4.6%, Affiliate 2.7%. In addition, there are 6.1% retired members, and 0.9% academics.



7.2 Length of LI membership

Just over half of respondents have been members of the LI for over 10 years, with a further 22% having belonged for 6-10 years.



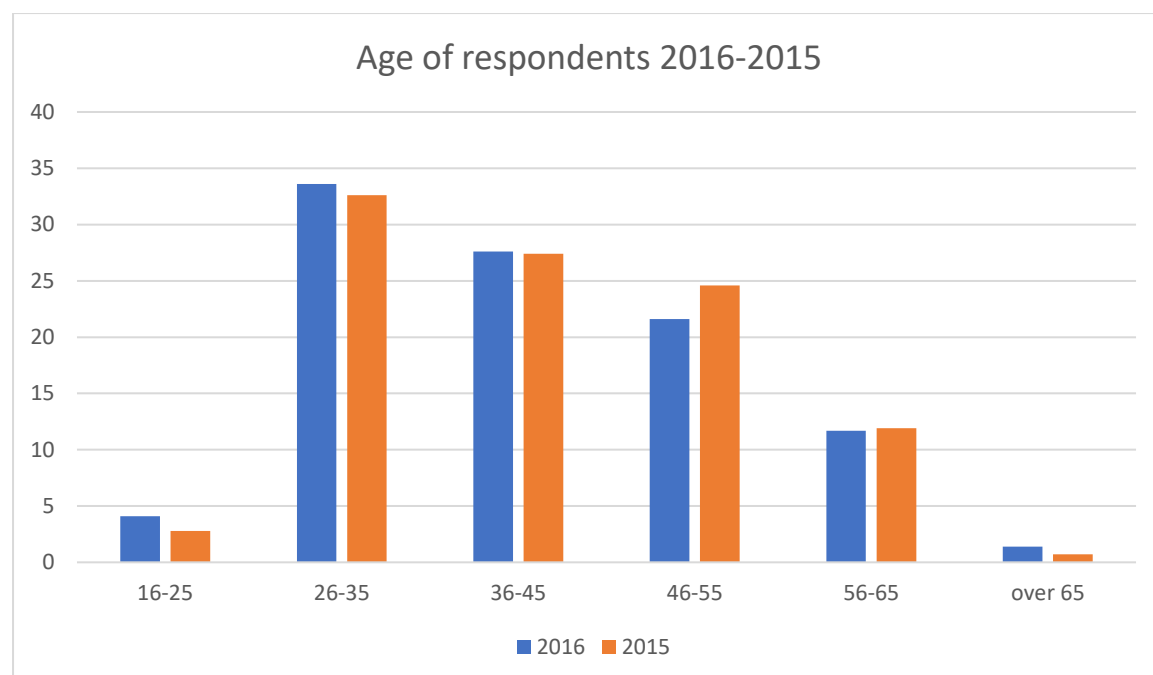
7.3 Demographics

This year the gender profile of respondents was 48.2% women to 51.2% men, which is closer to the 45%/55% breakdown of the overall LI membership than last year, when 52.5% of respondents were women.

80% of respondents identified themselves as White British (down from 86% in 2015), 1.95% as White Irish and 12.5% as White Other. 2.56% identify as Asian, while 0.92% say they are of mixed ethnicity. This represents increases against last year in those of Asian and mixed heritage (from 2.45% to 3.48%).

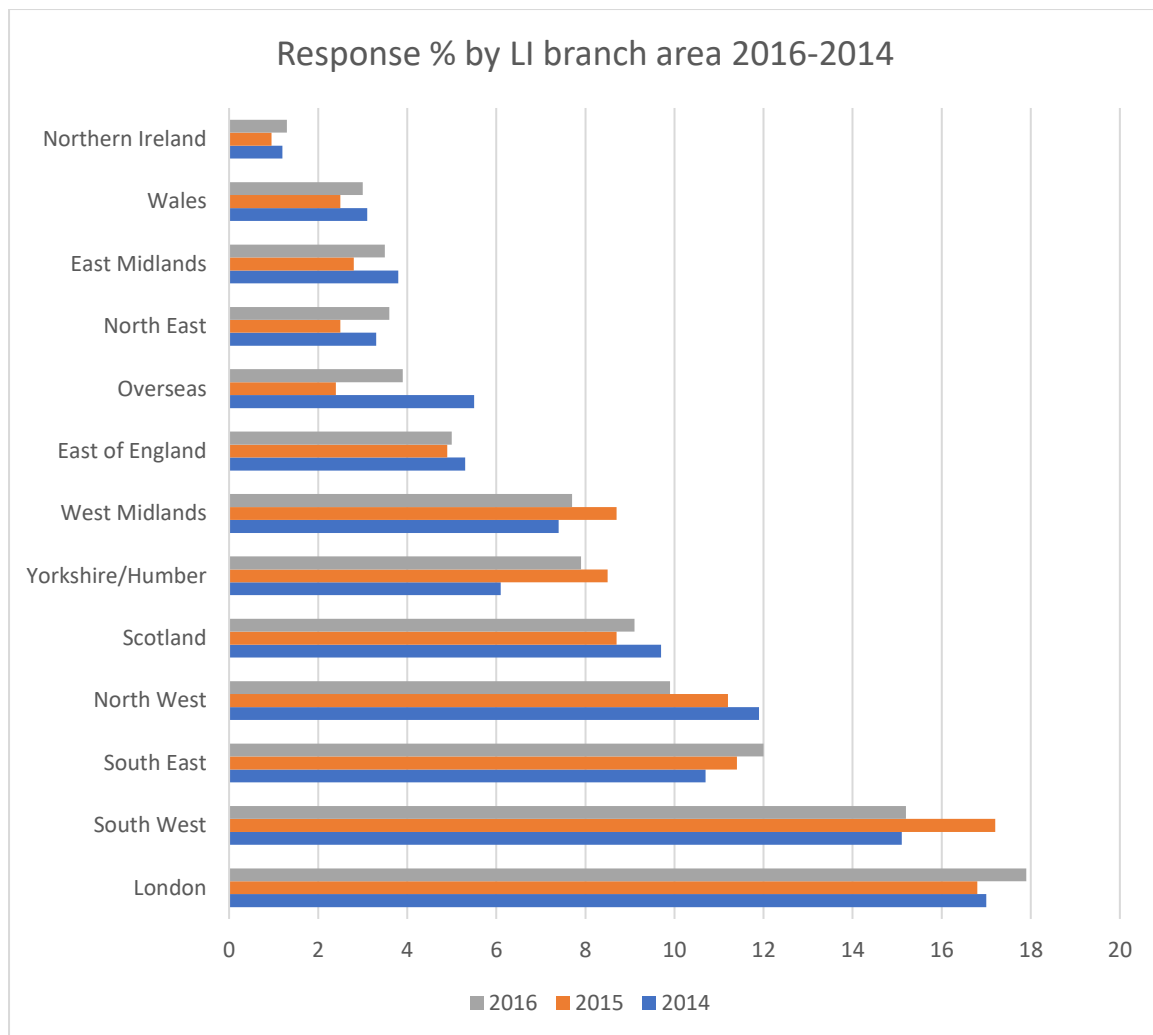
Regarding nationality, over 84% of respondents have UK nationality, down from over 88% last year, 10.7% have EU nationality other than UK, up from 7% last year, and the proportion who are not EU nationals has stayed the same at just under 4%.

The average age of LI members is 46, whereas 61% of responses came from those aged 26-45 years old. This year there was a slightly higher response rate from those aged under 35 compared to 2015.



7.4 Location by LI Branch area

18% of respondents come from London, followed by 15% the South West and 12% from the South East branches, though this year saw an increase in response from other areas of the country and from the overseas branch (though this remains well below the 6.3% of 2014).



8. Comments

Around a third of comments were about low pay in the landscape industry, particular given the length and expense of training and the level of responsibility. Several comments drew attention to the discrepancy with the pay of other built environment professionals, for example: ‘We are paid less than architects and urban designers, yet expected to deliver the same level of technical input’. One comment said that salaries for landscape architects are 50-60% higher in the USA, and in New York double that of London. The one positive comment about pay was from an employee in a multidisciplinary engineering firm. Fees are not seen to have increased over the past 7-10 years, are said to be particularly low in the north east, and there is concern about undercutting on fees in tenders, to the detriment of the quality of landscape work and of the profession. One person said they were on a ‘zero hours’ contract. Low pay is exacerbated by a culture of expecting staff to work unpaid overtime, which is a particular problem for working mothers.

For firms that are doing well, the problem is that there are ‘Not enough staff to do the work’. About 12% of the comments were about the difficulty of recruiting staff. There is a serious staff shortage in Cambridge, demand is seen to be high in the south and there is a shortage of graduates, some of whom go abroad once qualified, and of experienced, high-quality staff.

Low pay in the industry is thought to be discouraging people from entering the profession. Many landscape students are from the EU, so the situation is likely to get worse after Brexit. Brexit is said to be causing uncertainty for younger professionals and a reduction in movement from the southern hemisphere. One non-EU professional said he was the only one of a cohort of nine non-EU students at Sheffield to still be working here, partly because the need to earn £35K within five years made it difficult for graduates to stay, and if this requirement is placed on EU graduates after Brexit, the situation will worsen. It was suggested that the LI consider requesting government to designate landscape architecture as a 'shortage occupation' so that the £35K salary requirement does not apply.

There were quite a lot of comments about Brexit, which is seen to be already having a negative impact on the industry, and it is feared this will get worse, affecting both commissions and the availability of staff:

'The threat of leaving the EU seems to have negatively hit workload here'

'Disastrous downturn in commissions directly related to Brexit – seven project clients have asked to hold off on landscape issues, something I have never come across before.'

'Brexit will be disastrous for the profession in the UK'

Concern was also expressed about what will happen about EU environmental protection legislation, major projects funded by Europe and how LI chartership will be viewed in the EU in future.

Although the gender balance in the industry is good, there is a need for more gender equality, expressed in comments such as:

'Inequality in pay between genders is rife'

'Once I hit my thirties all my male peers were earning more than me with some earning over 25% more. The only way I can see how I can earn a similar level of pay is to put myself in the precarious position of going freelance. It is very dispiriting to feel good about the time, money and effort I have put into being a landscape architect with this obvious fact. I'm due to go permanent at the end of the year which will involve a 40% drop in pay. I'm doing it for security reasons so I can start a family with the confidence of a job to go back to after maternity leave but I can't see myself staying in this profession in the long term with the level of pay offered to permanent staff and the apparent lack of career progression for women in this company. I would be delighted if the Landscape Institute started a service that looked to support and retain women in the profession with financial and career advice.'

Some men in the civil service are earning significantly more than their women colleagues 'just for being in the role a few years longer at the time of the [pay] freeze'. One man commented that the profession is not accommodating to mothers, and none of the women who trained with his wife (including her) are now in the profession, despite all having worked in it when

they graduated. In addition, it was noted that it is a predominantly white profession and that firms need to hire for more diversity.

Another area of concern is the disappearance of traditional Landscape Architect roles from local authorities, with landscape skills spread across departments, so that a lot of landscape architects are 'hidden'. The effect of austerity has stalled careers, those made redundant have ended up in low-paid contract work and need support to reskill, and those who remain are struggling with low pay and an increased workload.

'Public sector cuts are affecting morale and effectiveness – long term will weaken the planning system and commissioning.'

'I would like to see LI doing more to promote the importance of landscape architects in local authorities'

'There is a critical need for the LI to support members employed across the public sector.'

Although quite a few people still feel that landscape architecture is undervalued, and that clients do not understand the profession, this is not as strong a theme as in the past. There was a feeling that the emphasis on LVIA is 'turning us into planners' and that the profession is now 'more planning and less design and implementation'. There remains a sense that landscape architecture is not viewed as positively as architecture or urban design, in Australia as well as the UK.

'Landscape architect services seen as less necessary than those of planners, architects or urban designers.'

Some have a feeling of being marginalized, that the profession is declining and that the landscape architects are brought in at the end to do 'landscaping'. Landscape suffers in the planning system from a 'lack of statutory landscape legislation' and we have a 'weak legislative system which doesn't protect the environment'.

There is seen to be a crisis in landscape education, which needs the support of the LI 'or there will be no Landscape Architects being trained in this country'. Few British students are being trained and there is a worrying closure of courses and reduction in student numbers.

Another theme is the mismatch between landscape education and what the profession demands:

'My university course had little to do with the work I do now'

'young professionals are focused on design and less on written work and analysis...few are keen to write and do planning work'

'The Landscape Profession has focused too much on the arts at the expense of the science and as a result has boxed itself into a tiny corner of relevance.' students 'not

being taught enough technical information and they all seem to imagine they are going to be Martha Schwartz'

Graduates need to understand sustainability and wildlife, and have a better knowledge of plants and horticulture and the practicalities of landscape construction.

Feedback for the Institute included requests for back to work courses for those who have taken time out (eg. for children), training days that are within the price range of graduates, more transparency about what member subscriptions pay for, more CPD for small businesses, and to look at fee scales ('not revisited for a decade'). The increase in Technical Notes was welcomed, as was the idea of the Ambassador for landscape scheme. One person thought that LI practice registration 'does not deliver benefit to business as a sole practitioner', while others said 'LI has better focus on serving members as professionals'. Regarding the pathway to chartership one commented that it should be 'more work and mentor based assessment' rather than self-appraisal.

One summed up the priorities for the LI as:

'Increase awareness of landscape architecture amongst the public. Promote the industry in high profile platforms via TV and media. Help practitioners and their employees assist the LI in achieving this goal and others.'

Positive feedback includes:

'Some great improvements in profession, especially with more prominence'

'The LI is doing great things in trying to raise the profile of the profession and turning the Institute into a very professional body who are respected among the built development professions alongside RIBA, RICS and ICE etc. This has not always been the case but I think over recent years the LI and its members have gone a long way to being held in the same high esteem as members of these other bodies. There is still a way to go but I sense things are slowly changing for the better'

'Landscape architects bring together complementary professions and act as champion for both environment and people...This integration of community engagement and 'traditional' landscape architecture skills is an emerging and exciting trend'

'Could not imagine having enjoyed a better career path, fulfilling in every way.' 'Great profession that really makes a difference when embedded into projects early.'