

State of Landscape Research Report

Landscape Institute

CONFIDENTIAL

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Allman Horrocks Consulting Ltd.

Oxbow Farm, Avon Dassett, Warwickshire CV47 2AQ

Tel: +44 (0) 1295 690573 E-mail: info@ahc.co.uk Web: www.ahc.co.uk

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1 Introduction

The Landscape Institute (LI) identified a requirement to carry out research to better understand the practices that make up their membership. LI has ca 500 registered landscape practices and approximately 5000 members. There was also a need to get a much better understanding of the nature and extent of landscape skills across the UK to develop the Landscape Institute and to make it a more relevant body to meet the changing needs of landscape professionals and to help to make them commercially successful in today's marketplace.

"I want the Landscape Institute to be punching for landscape and trying to get that on the agenda as something that people respect" – **Principal Small Landscape Practice**

To answer these questions the Landscape Institute commissioned research both across its member base and across the wider profession. The purpose of this research was to get under the skin of the profession and to identify key insights across three broad objectives:

- Understanding today's landscape practice
- Understanding skills requirements
- Understanding the contribution of the Landscape sector to the wider economy

The intelligence gained from the report aims to inform and assist the Landscape Institute in achieving its strategic vision for 2018-2023 of being:

- A modern, relevant, expert voice for all landscape & placemaking professionals
- A profession that benefits people, place and nature by transforming landscapes through planning, science, Design and management.
- Develops the skills, knowledge and behaviours of its members to help them create a sustainable future which is responsive to such challenges as demographic shifts and climate change.

When reviewing industry skills in a global context the World Economic Forum(WEF) produced a report in 2016 called the Future of Jobs: (<http://reports.weforum.org/future-of-jobs-2016/>).

The context of this is on disruptive business changes to business models that will have a profound impact on the employment landscape over the coming years. The WEF identify that many of the major drivers of transformation currently affecting global industries are expected to have a significant impact on jobs, ranging from significant job creation to job displacement, and from increased labour productivity to widening skills gaps.

In a rapidly changing economic world, the ability to anticipate and prepare for future skills requirements in the landscape sector is vitally important if we are to make best use of the opportunities that these changes present and to minimise and deflect anything negative.

The chart adjacent is taken from the WEF report and sets into context the changes in skills requirements between 2015 and 2020

Creativity jumps from number ten to number three in the list, to make the top three skills in 2020 complex problem solving, critical thinking, and creativity.

Three skills that Landscape professionals will identify with as being central to the value they add to any project they are involved with.

According to the WEF, the world is in the middle of a fourth industrial revolution.

in 2020

1. Complex Problem Solving
2. Critical Thinking
3. Creativity
4. People Management
5. Coordinating with Others
6. Emotional Intelligence
7. Judgment and Decision Making
8. Service Orientation
9. Negotiation
10. Cognitive Flexibility

in 2015

1. Complex Problem Solving
2. Coordinating with Others
3. People Management
4. Critical Thinking
5. Negotiation
6. Quality Control
7. Service Orientation
8. Judgment and Decision Making
9. Active Listening
10. Creativity



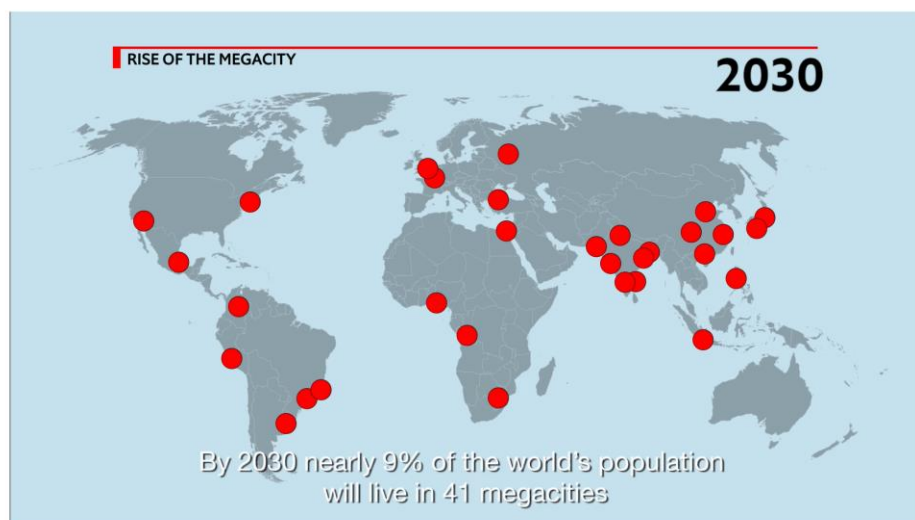
Source: Future of Jobs Report, World Economic Forum

If the first industrial revolution (1784) was characterised by mechanization, the second (1879) by the advent of electricity, mass production and the division of labour, and the third (1969) by advances in the field of electronics and IT. This fourth industrial revolution will be characterised by the fusion of different technologies like genetics, robotics, nanotechnology, 3D printing and biotech to create a world that is more integrated than ever before.

Within the WEF report and specifically about the built environment, it identifies several “megatrends” that are likely to be driving these changes in the jobs sector. Specifically, these themes are identified as rapid urbanisation; increasing middle classes in emerging markets; new energy supplies and technologies, and the impact of climate change.

Urbanisation is a factor that will drive the landscape sector in the coming years.

According to the Economist, urbanisation is happening faster today than at any time in history. By 2030 nearly 9% of the global population will live in so-called megacities—cities with more than 10m inhabitants. In 1950 New York and Tokyo were the only so-called megacities; cities with more than 10m inhabitants. By 1980 these were joined by Mexico City, Sao Paulo and Osaka. In 2010 there were over 20 megacities spanning almost every continent. Today, there are 32 megacities.



Urbanisation is happening faster than at any time in human history. Asia accounts for over half of today's megacities. By 2030 nearly 9% of the world's population will live in 41 megacities. But it's in Africa where some of the most rapid urbanisation will take place in the future.

2 Research Objectives and Approach

2.1 Objectives

The overall research objective was to gain insight from members, registered practices and non-members of the Landscape Institute to help improve its relevance and offer to those working across the sector. Specifically, there were three areas of focus:

2.1.1 Understanding Today's Landscape Practice

- What does a modern practice look like? (beyond existing LI members in such practices)
- In what environment are Landscape Design, Planning, Management, Urban Design & Science activities delivered?
- What are the specific organisational structures and job roles?
- What are the new - emerging - professional roles e.g. digital landscape, community engagement etc.
- To understand the scope of the profession and map out the interrelationships within the different disciplines

2.1.2 Skills Requirements

- Understanding the skills and competencies required in the modern practice
- Identifying any common skills elements between areas of practice that could form the core of a common core technical syllabus
- Identifying any skills variances— e.g. between management-led and design-led practices
- Understanding the emerging skills – that can be incorporated into the syllabus
- Identifying the skills gaps that practices are seeing in the graduates coming through today

2.1.3 Salaries Analysis

- A high-level comparison of salaries compared with salary-specific surveys undertaken in previous years

2.1.4 The Value of the Landscape Sector

- To understand the economic/societal value of the sector in the UK e.g. current contribution of landscape profession to UK economy & society e.g. number of people employed, GDP.

2.2 Research Approach

There have been three main phases of the research:

1. In depth interviews structured to cover all the key market segments and where necessary provide a regional mix.
2. A quantitative phase in the form of an online survey that aimed to provide representative coverage of the market, and to put some robust data behind the analysis.
3. Additional analyses, following a review of the findings from the above

2.2.1 Phase One Research Activity – Depth Interviews with Stakeholders

This initial phase of the project was to gain feedback and input from key stakeholders through a series of interviews. This was conducted during July and August 2017. The interviews were structured around obtaining a general view of the Landscape Institute and key challenges and then the three broad areas of the research study:

- Understanding the Modern Practice
- Skills Requirements
- Measuring the Value of the Landscape Profession

The scope of the study was wide, and it was planned that initial stage of research should cover as many areas and interrelationships with other disciplines as possible. Interviews were mostly conducted over the phone. The table below provides a breakdown of the interviewees:

Contact Type	Number of Interviews
Large Multi-Disciplinary	4
Large Landscape Practice	2
Mid-sized Landscape Practice	3
Small Practice	3
3 rd Sector (Emphasis on Land Management and Land Science)	5

The findings from this first stage were summarised in the interim report “*Summary of Stakeholder Feedback*” (AHC-LI-RP-002), issued to the Landscape Institute in August 2017. This interim report provided an initial “notes and quotes” summary of the key themes emerging from the initial qualitative interviews, and focused on:

- General feedback on The Landscape Institute
 - Communication from the LI
 - Involvement with the LI
 - Maintaining Membership with Other Professional Bodies
- General feedback on the profession
 - Involvement of Landscape Architects in the Early Stages of Projects
 - Perceptions of Landscape Architects
- Perceptions on today’s Landscape Practice
 - Size of Practice
 - Definition of Multi-Disciplinary practices
 - Challenges faced by Business
- Skills requirements for the modern practice
 - Importance of creativity and design skills
 - Importance of understanding the commercial process
 - Importance of Communication skills
- Measuring the value of Landscape Sector
 - The importance of Communicating Value and the role of the LI in demonstrating value

2.2.2 Phase Two - State of Landscape Talent Survey

This phase formed the main body of research activity and targeted Landscape Institute members and non-members who work in the natural and/or built environment sectors. This included landscape managers and planners, ecologists, Urban Designers and place makers, engineers, heritage workers and conservationists, architects, researchers, town planners and surveyors.

The survey took approximately 25 minutes to complete and was incentivised (a prize draw to win a £300 John Lewis voucher).

2.2.2.1 Survey Promotion

The survey was promoted extensively through direct mail to existing members and through social media.

The survey was also promoted through other partner bodies that included the following:

- Arboricultural Association, British Association of Landscape Industries, Construction Industry Council, Chartered Institute of Ecology and Environmental Management, Chartered Institution of Water and Environmental Management, Green Infrastructure Partnership, Institute of Chartered Foresters, Institute of Place Management, Landscapes for Life, Royal Forestry Society, Society of Garden Designers, Urban Design Group, Town and Country Planning Association, UK Environmental Law Association

2.2.2.2 Survey Design

The survey was designed to ensure that only relevant questions were asked to the right people. For example, Landscape Practice Heads, which were identified by the LI within the member lists used to promote the survey, were asked more detailed questions on the structure and challenges of their practice. The survey was structured in the following sections:

- Professional Life:
 - Years in employment, education, type of company worked for
- Skills and competency questions in the following areas:
 - Professional, Educational, Digital, Design and construction, Urban, Landscape Planning, Landscape Management, Science
- Organisation questions:
 - Firmographics (Number of employees, turnover, location), Type of client, Business and recruitment challenges, Benchmarking (turnover, number of projects per year)
- “About you” questions:
 - Demographics (Age, sex)
 - Equality and Diversity (Ethnicity, sexual orientation, Disability)

The skills and competencies questions were framed within the context of the respondent’s professional role – as demonstrated by the example question below:

Please select which of the following **LANDSCAPE MANAGEMENT** skills you have sufficient knowledge, expertise and experience of to provide as part of a professional service. (SELECT ALL THAT APPLY)

Initiating landscape management at a strategic level

- | | |
|--|--|
| <input type="checkbox"/> Area countryside management | <input type="checkbox"/> Landscape Partnership schemes and similar |
| <input type="checkbox"/> Area management plans/projects | <input type="checkbox"/> Maintenance planning and programmes for entire holding |
| <input type="checkbox"/> Coastal zone management | <input type="checkbox"/> Protected landscapes (National Parks/AONBs) |
| <input type="checkbox"/> Community forests | <input type="checkbox"/> River basin/ catchment management |
| <input type="checkbox"/> County/District recreation management/development plans | <input type="checkbox"/> Strategic initiatives (e.g. transfer of parks to alternative providers) |
| <input type="checkbox"/> Establishment of strategic management projects | <input type="checkbox"/> Urban fringe initiatives |
| <input type="checkbox"/> Extensive landholdings (e.g. National/Woodland/Land/Wildlife Trust) | <input type="checkbox"/> None of these |

Instead of asking individuals to self-assess their skills levels, the job requirement approach asked then about the skills they use in their jobs. This provides both a proxy measure of skill levels (individuals are assumed to possess these skills as they exercise their jobs) and of skill demand (the skills needed in a job).

2.2.2.3 Survey Respondent Profile

The survey was conducted in accordance with the code of conduct of the Market Research Society and respected respondent anonymity.

The survey closed on the 8th November 2017 and had a total of 844 qualified responses:

- 586 complete responses: 512 from LI members, 74 from non-members
- 258 partial responses: 198 from LI members, 60 from non-members

During the analysis, the desire has been to include as many respondents as possible, however this has also needed to be tempered by the need for results to be statistically significant. When comparing different questions, the base size is variable and depends on the number respondents who answered both questions.

2.2.2.4 Statistical Accuracy

To understand the accuracy of the results of any survey, two calculations are necessary:

- The margin of error
- The statistical significance of any differences found

To understand how accurate the survey results are, it is important to calculate how much error is likely given the size of the sample surveying in relationship to the total population.

The margin of error is the amount of error you could expect to find, due to just chance, above or below the actual figure obtained in the survey results.

To calculate an acceptable margin of error, you must first select the confidence level you desire from the results. An industry standard in market research is a confidence interval of 95% and this has been used for this analysis.

Calculating the margin of error is also reliant on an estimate of the size of the total universe we are researching. Based on the LI membership, we can reliably estimate the universe to be approximately 5000 members, whilst 512 LI members completed the survey in full.

With a confidence interval of 95%, this gives us a margin of error of 4.1% for those complete responses from LI members. This means that survey responses from LI members can be considered reliable, plus or minus 4.1%, in 95 out of 100 responses.

Where sub-groups are compared in the analysis, only significant differences are highlighted. Statistical tests were completed against all sub-group analysis and these are available for the LI to study.

It is also important to not only interpret the survey results guided by statistical analysis, but also to identify what is meaningful within the context of the questions we are trying to answer – i.e. looking at indicative results rather than relying on representative analysis alone.

This margin of error does assume the sample is random with every member having the same chance of being selected for the survey. This is never the case due to biases that come into effect due to sample selection or survey design. Self-selection bias for example is a factor to consider along with non-response bias.

With online surveys people who are more comfortable with online technology are generally more likely to take part, and people with strong opinions, either negative or positive, are more likely to participate therefore creating polarised opinions. To minimize these biases, a census would need to be taken, however this is never normally practical, so a trade-off occurs. This survey has been designed to minimize these biases, and to ensure as representative sample as possible within the scope and parameters of the research study.

It been agreed that the non-member sample is not sufficiently large to allow a comparison between member and non-member responses or to draw conclusions from it throughout the survey. A comparison of responses between members and non-members has been included within the “Skills Requirements of the Modern Practice” section, with the caveat that the small sample sizes for non-members needs to be considered. Additional comparison between member and non-member responses have been included as an Appendix in this report.

2.3 Definitions

For the basis of this project, the following definitions were assumed:

Term	Definition
Private professional practice	Practice or organisation which is engaged in the landscape profession (Design, Management, Planning, Urban Design or Science)
Consultancy	A person or company providing specialist Landscape related services either on a per project or contract basis
Practice heads	Practice heads were defined based on either who was identified as the main contact for the LI registered practices, or who identified themselves as a senior person within the organisation (i.e. practice head, head of dept, Principal Landscape Architect). Therefore, responses from “practice heads” will contain responses from the heads of private practices and consultancies.
Government advisory	An organisation with the sole purpose of advising the government.
Heritage agency	Any organisations involved in protecting landscape heritage.
Landscape industries/ supplier company	A materials supplier to the landscape industry
Local authority	A Local Authority with a landscape section or department engaged in the landscape architecture profession (Design, Management, Planning, Urban Design or Science)

3 Research Findings

3.1 Profile of the Modern Landscape Practice

3.1.1 Introduction

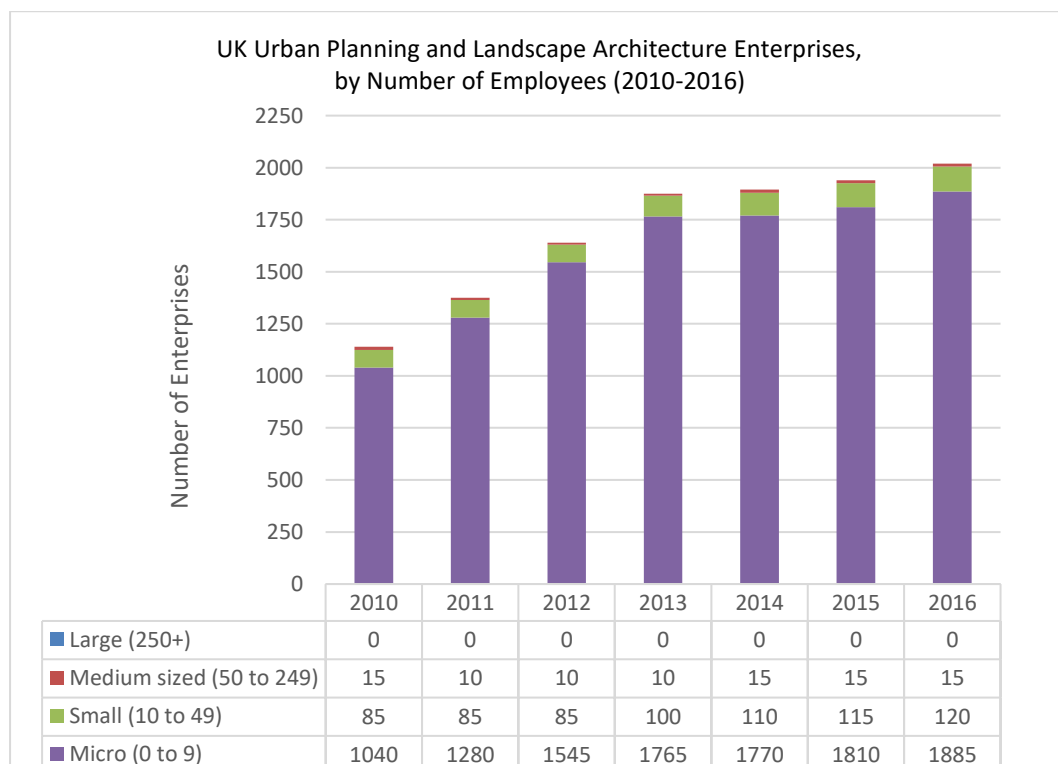
Despite uncertainty in the business climate, the market for architectural services, within which the Landscape and placemaking sector sits, is still demonstrating significant optimism. With its involvement from the earliest stages of pretty much every building and infrastructure project, the industry is exposed to changes in levels of confidence and investment in the construction sector. In the UK, the uncertainty created by Brexit is to some degree being offset by the Government's plans to prioritise infrastructure projects such as high-speed railway HS2, a third runway at Heathrow and flood defences.

Attracting and retaining permanent staff remains challenging in the sector, particularly for smaller firms, who are competing against bigger companies with bigger budgets. There is also a trend in the architectural industry towards greater consolidation on the one hand, and on the other by certain areas becoming more specialised and concentrated in smaller firms. There is a drive for one-stop shops that include architects, consultants and contractors all under one roof to harness greater efficiencies.

Technology is playing a growing role in the sector, both in terms of expanding the scope of what firms need to consider at a strategic level and when it comes to improving the efficiency of their own operations.

The market for architectural services recognises that they are operating in uncertain times, but they remain reasonably confident about the short- to medium-term future in terms of the amount of business and their ability to retain and recruit the people they need.

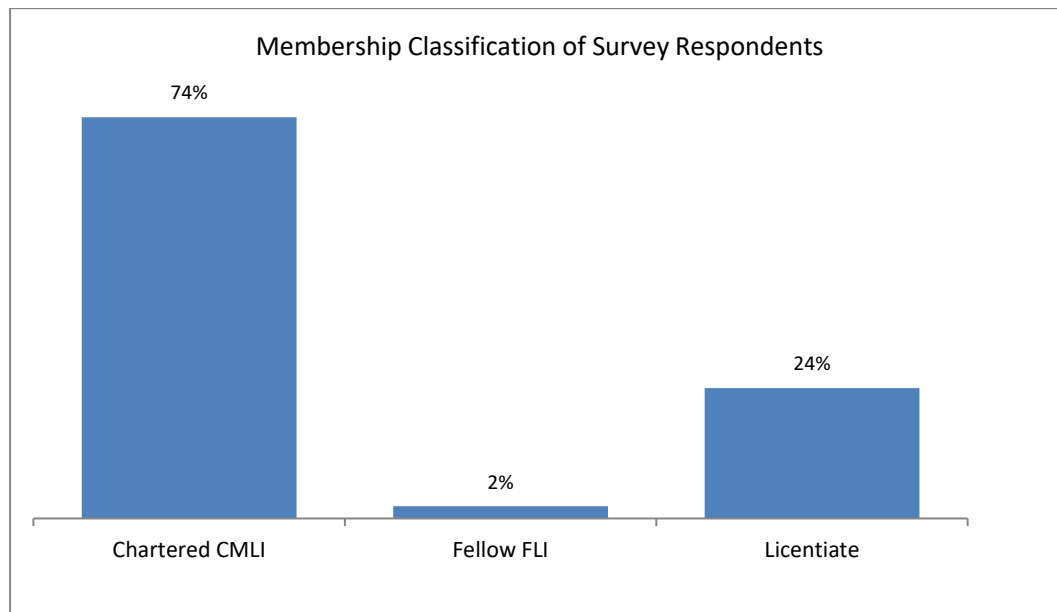
In 2016, there were estimated to be 2,020 urban planning and landscape architecture companies in the UK. The clear majority fall into the micro business category (0-9 Employees). Since 2010 the total number has grown by an estimated 10% Compounded Annual Growth Rate(CAGR).



Source: Nomis, UK Structural Business Statistics

3.1.2 Membership Profile of Respondents

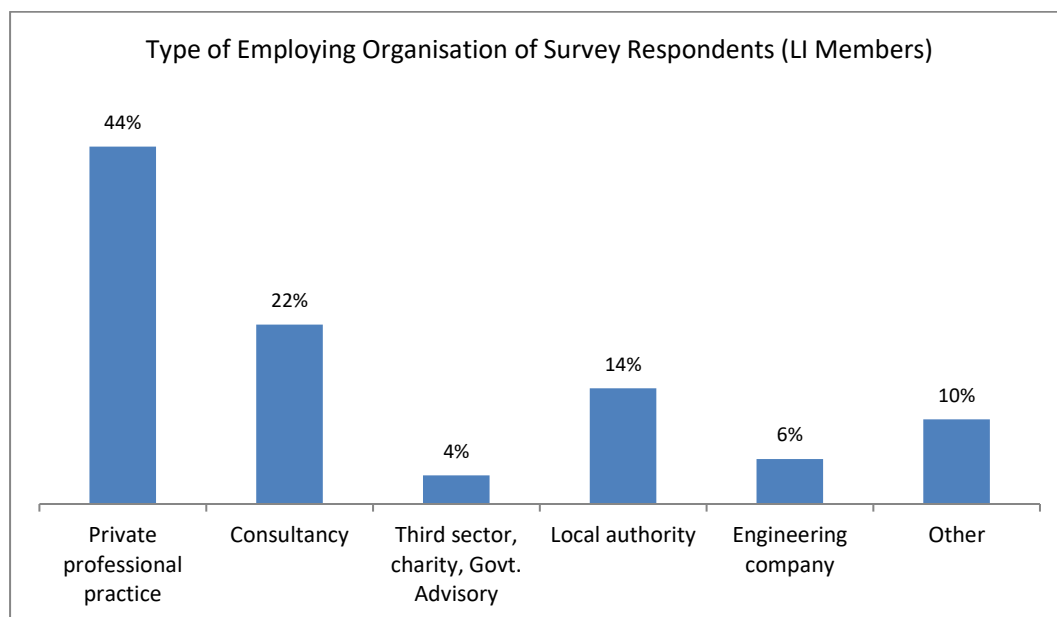
Survey respondents were asked to indicate their LI membership classification, with the results shown below:



Base = 626 LI Member Respondents

3.1.3 Types of Organisation

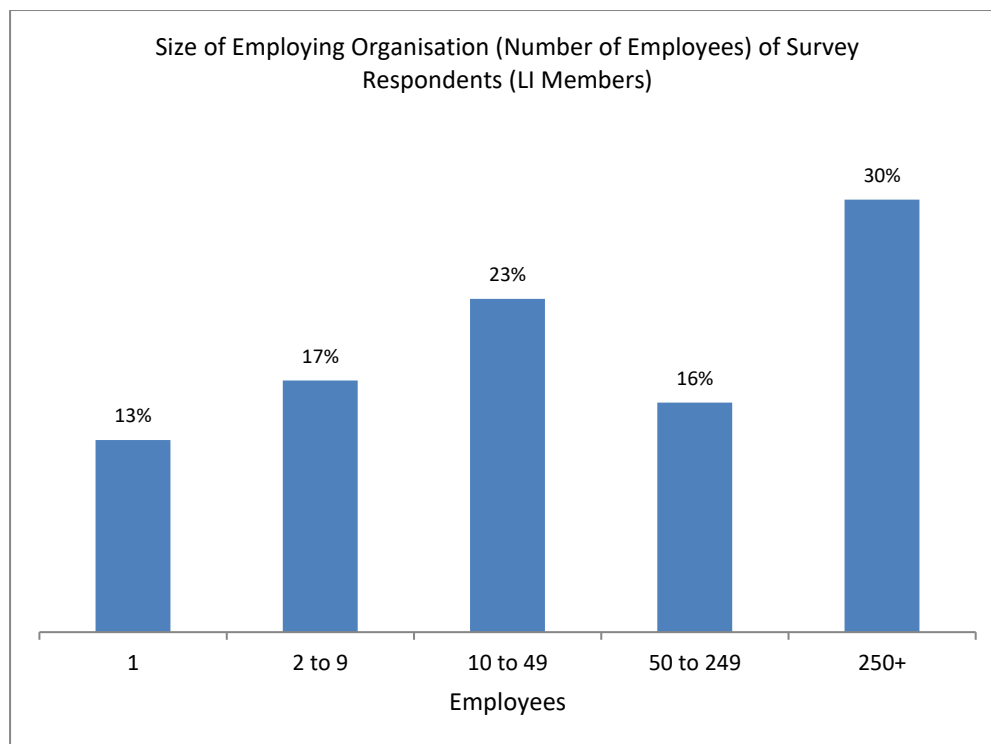
Survey respondents were asked to indicate the types of organisation they worked for, with the results shown below:



Base: 650 LI Member Respondents

44% of LI members work for what they would describe as provide professional practices, with a further 22% working for a consultancy. 14% of member respondents work for a Local Authority.

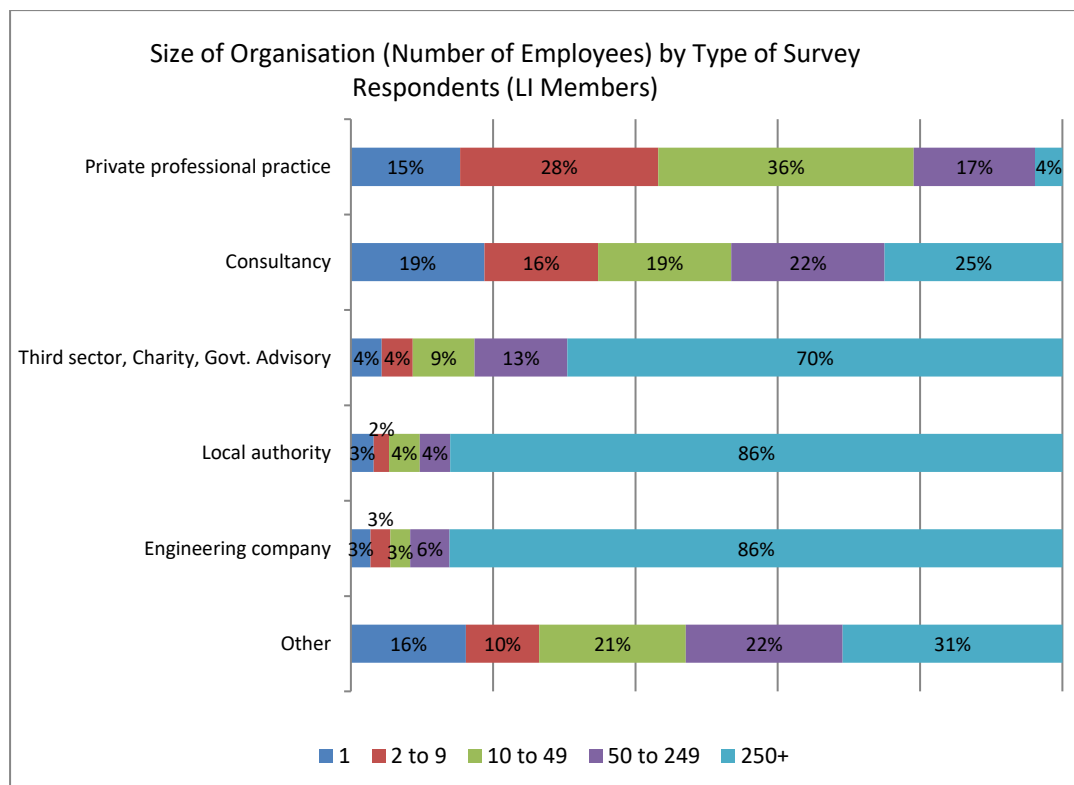
3.1.4 Size of Organisation



Base = 650 Member Respondents

Member respondents indicated that they work for a broad range of different sizes organisations, with 30% working for organisations with more than 250 employees.

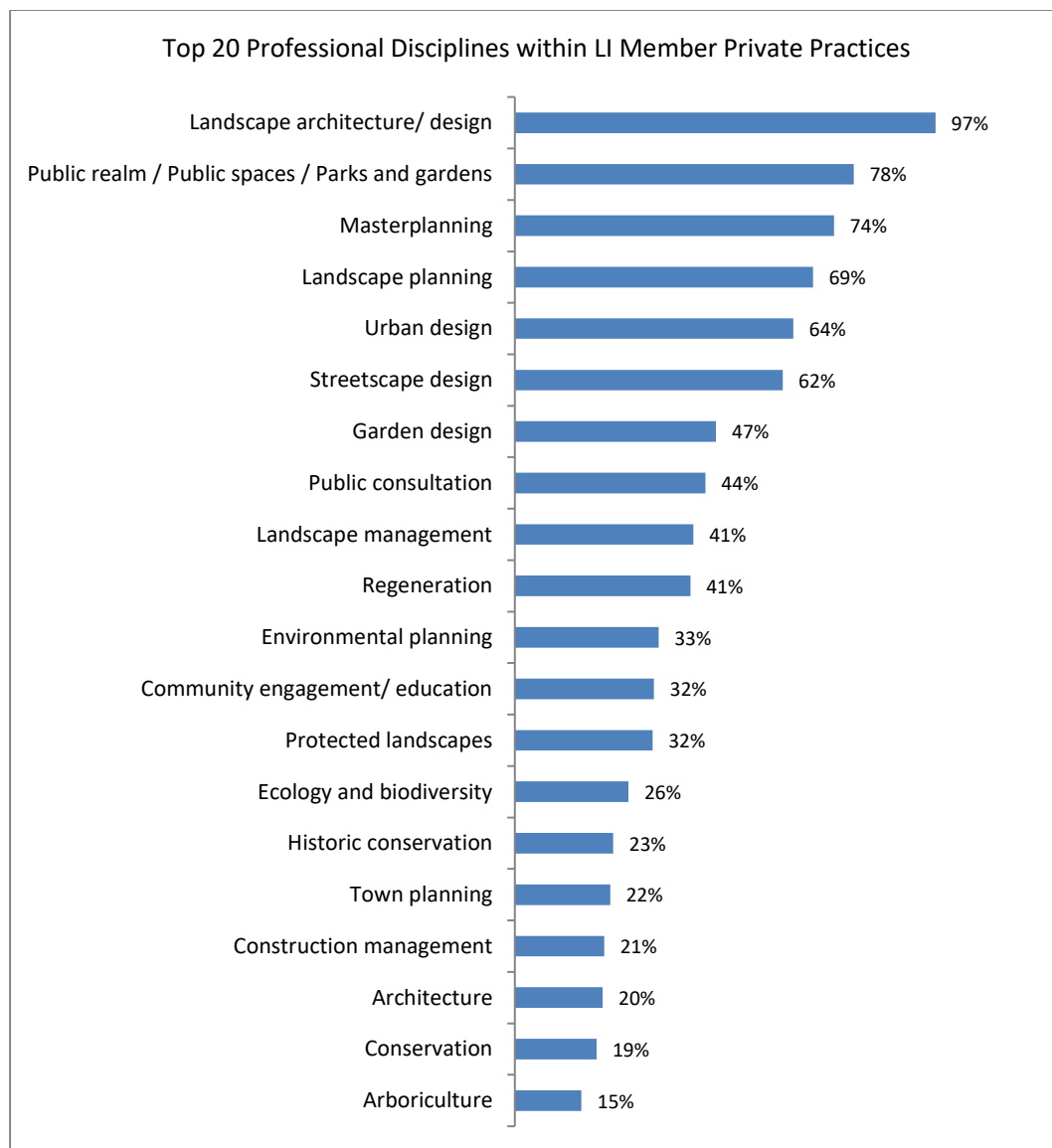
3.1.4.1 Size of Employing Organisation by Type of Organisation



Base: 650 Member Respondents

43% of the member sample, who identify as a professional practice, have less than 10 employees with 54% of consultancy companies having less than 50 employees.

3.1.5 Private Practice Profile



Base: 287 LI Members describing their workplace as a "Private Practice"

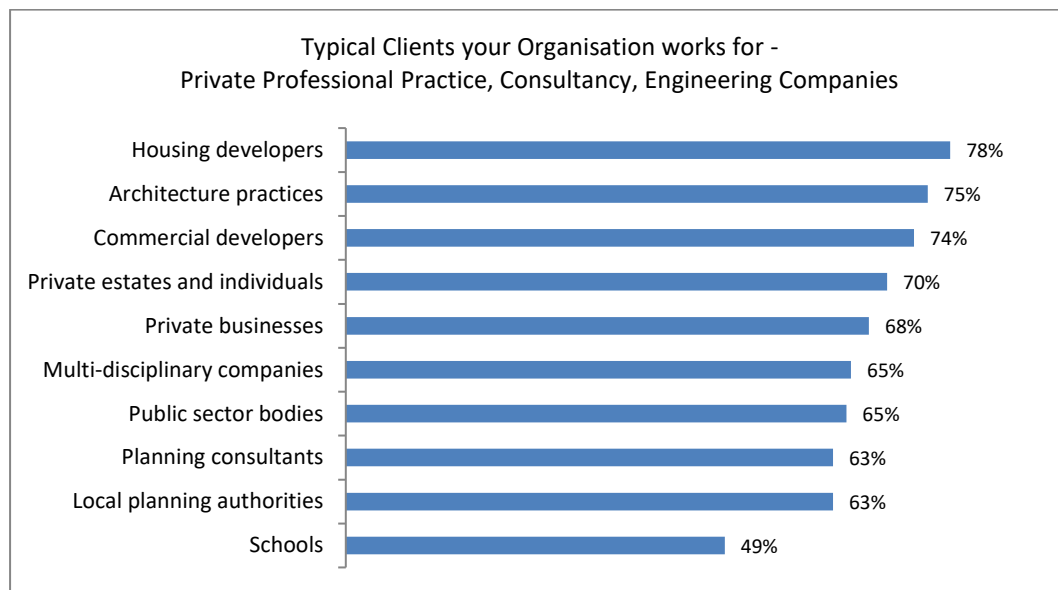
Across all member private practices who completed the research, there were six disciplines that are practiced by most private practices:

- Landscape Architecture
- Public Realm/Public Spaces/Parks
- Master-planning
- Landscape Planning
- Urban Design
- Streetscape Design

When compared with respondents who define their workplace as a consultancy the significant difference between private practice is that they are more likely to be engaged in a wider variety of activities such as arboriculture, community engagement, environmental conservation, environmental planning and Landscape Planning.

3.1.6 Client Profile: Where Work is Coming From

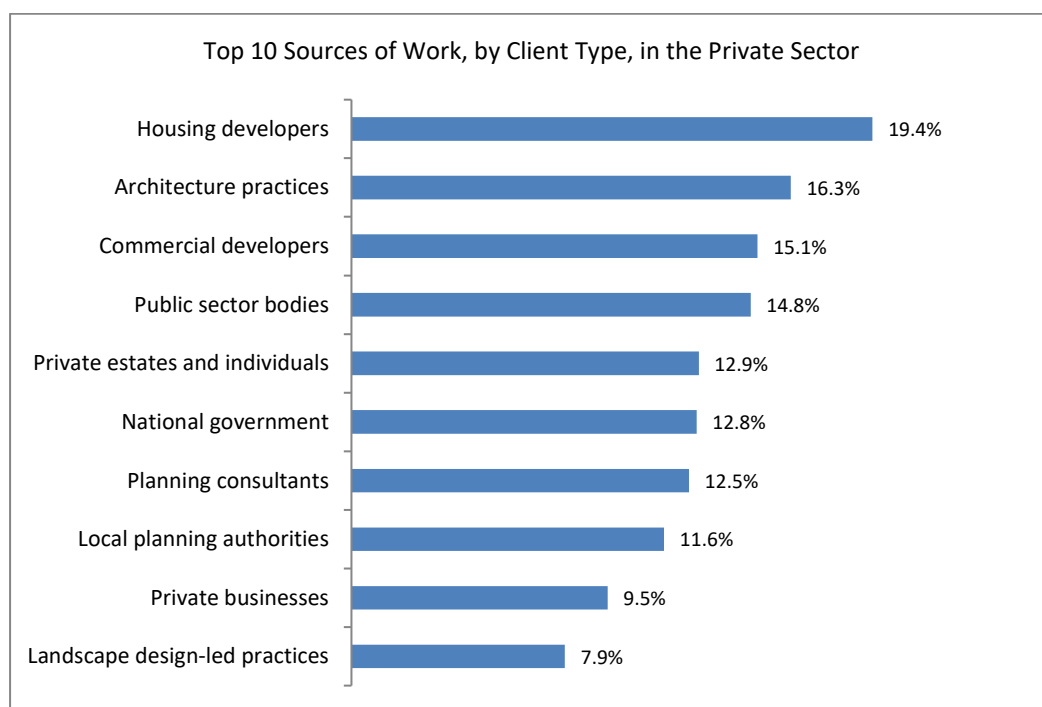
3.1.6.1 Private Professional Practices, Consultancies and Engineering Companies



Base: Private Practice, Consultancy, Engineering (172 member and non-member respondents)

For private professional practices, consultancies and engineering companies, work is obtained from a varied mix of clients, with respondents indicating the most common clients are: housing developers, architectural practices, commercial developers and then private estates and individuals.

3.1.6.2 Private Sector



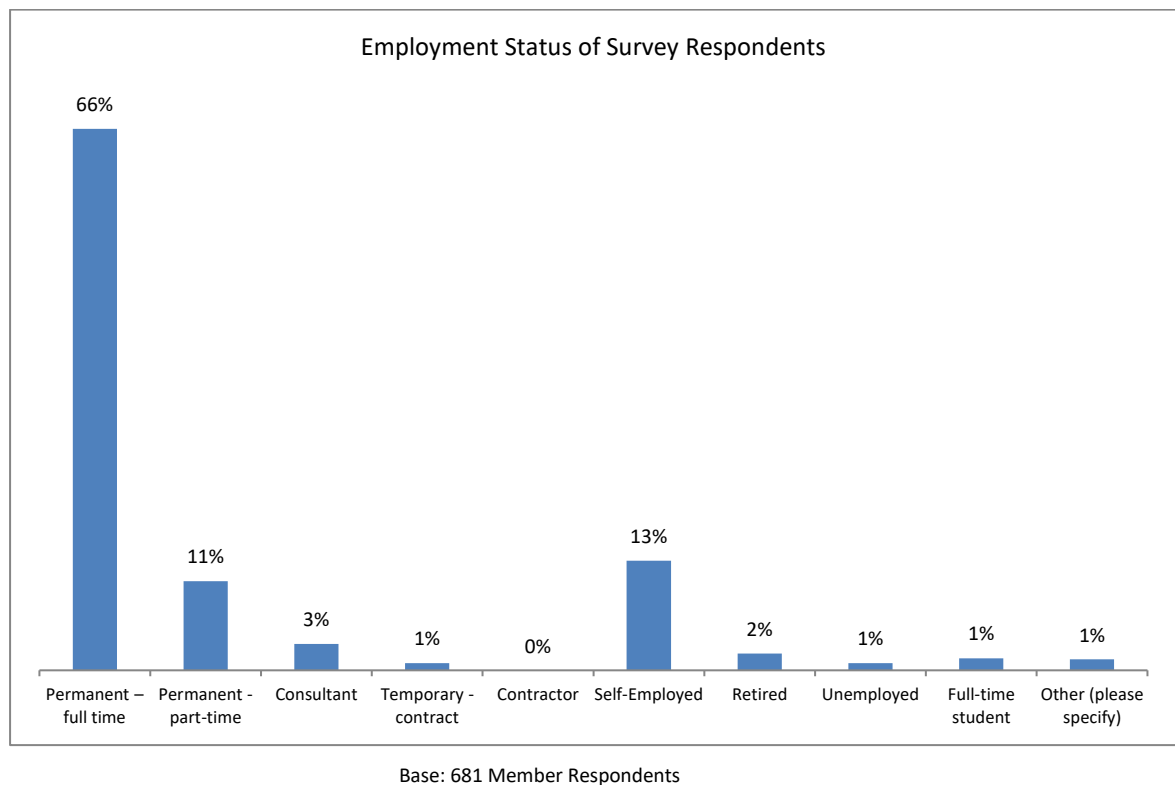
Base: 223 Heads of private professional practices, consultancies and engineering companies in the private sector

Note: numbers relate to the average proportion of a private practice's work. As it is a mean calculation for each client type, numbers will not add up to 100%.

19% of all work carried out in the private sector is with housing developers. Work subcontracted by other landscape practices is the second most important channel with on average 16% of work coming through here.

3.1.7 Employee Profile: Types of Staff Employed

3.1.7.1 Full and part-time



Approximately two thirds of member respondents indicated that they work full-time.

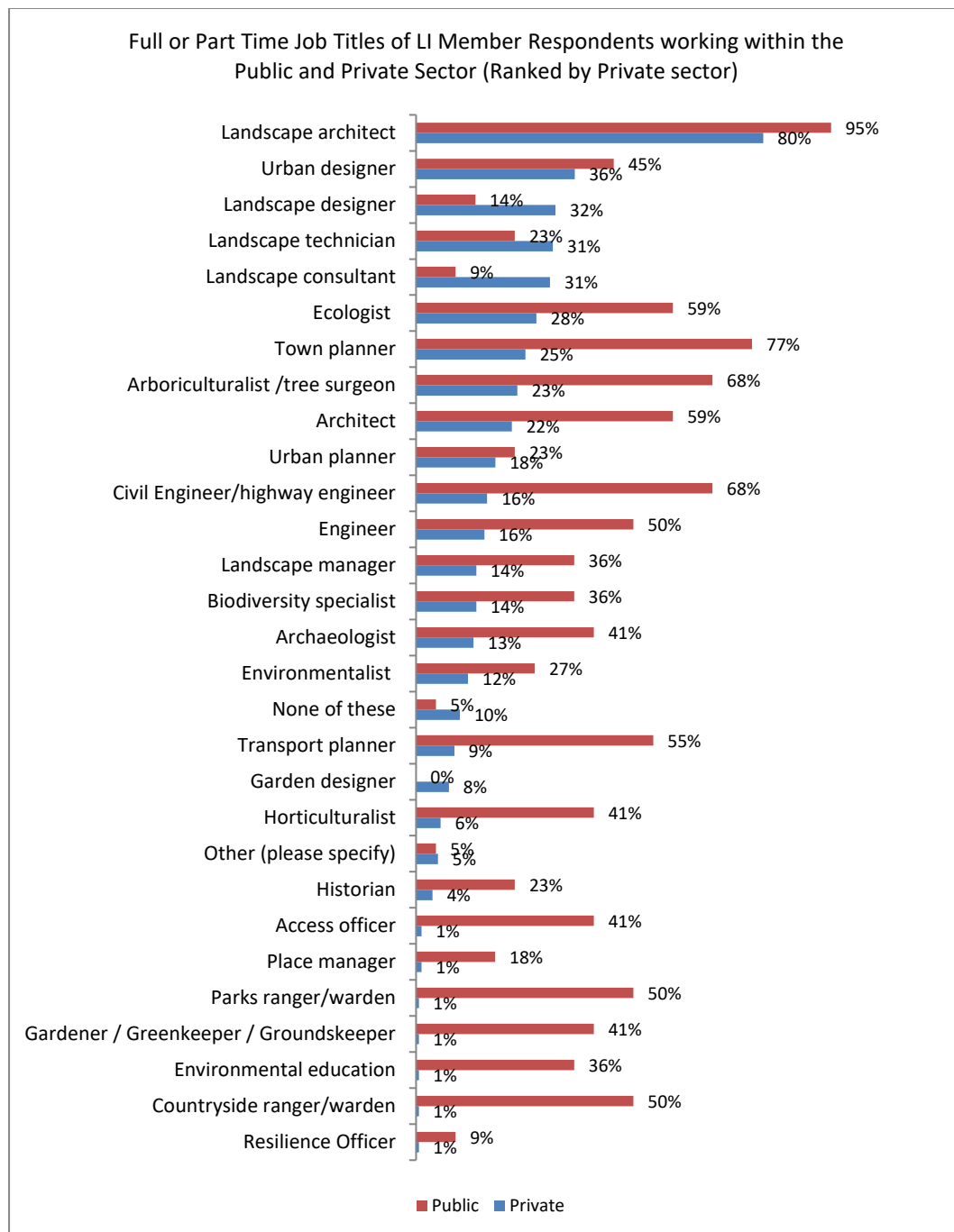
3.1.7.2 Job Titles

Unsurprisingly “Landscape Architect” is the most popular job title with over 75% of all Public and private sector organisations stating this. However, thereafter, there are notable differences between the types of job roles when comparing public vs private sector respondents.

In the Private sector (private practices and consultancies) there tends to be less of a range of job types employed, with the most popular being:

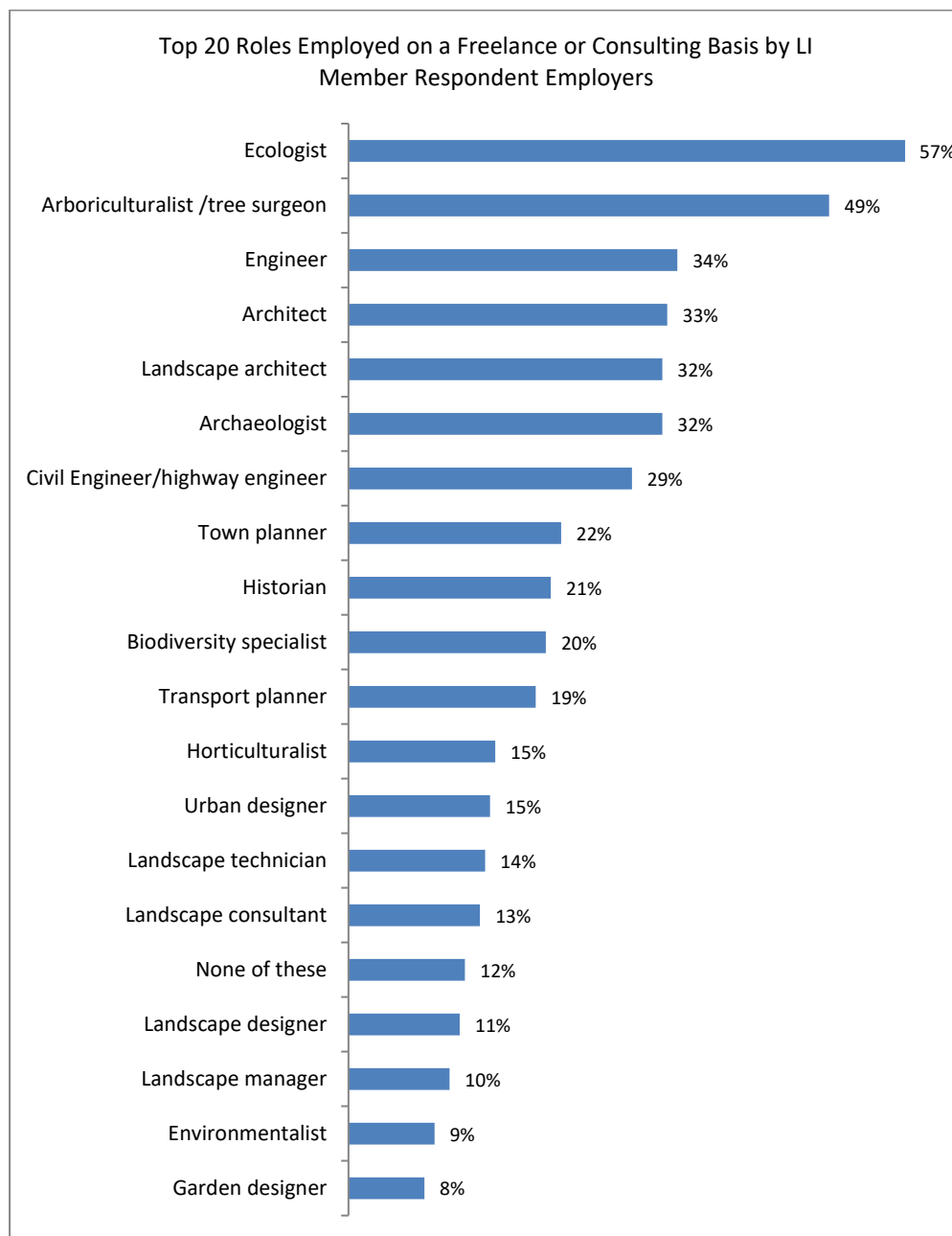
- Landscape Architect
- Urban Designer
- Landscape Designer
- Landscape Consultant
- Landscape Technician

In the public sector however, there is a greater variety of job roles. Whilst the roles of Landscape architect and Urban Designer are comparable in number between private and public sector, ecologists, town planners, civil engineers, and transport planners are all more likely to be employed either full or part-time in a public-sector setting.



Base: Private: 159 LI Members in the Private Sector; 22 LI Members in the Public Sector

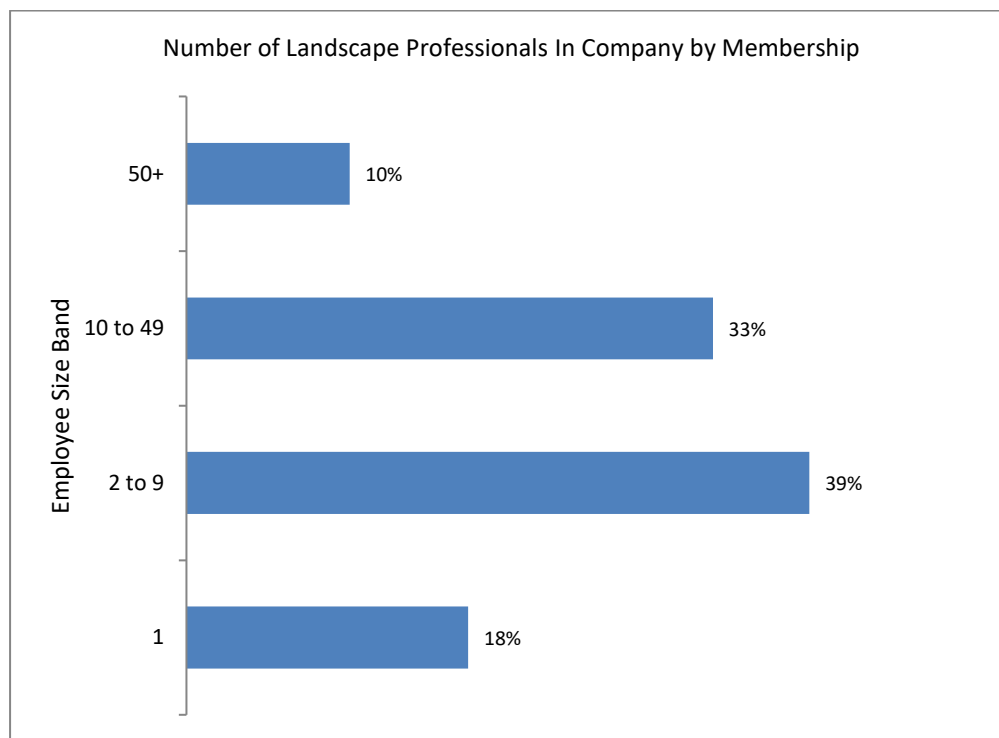
3.1.7.3 Freelance and Outsourced



Base: 193 Heads of Practice LI members

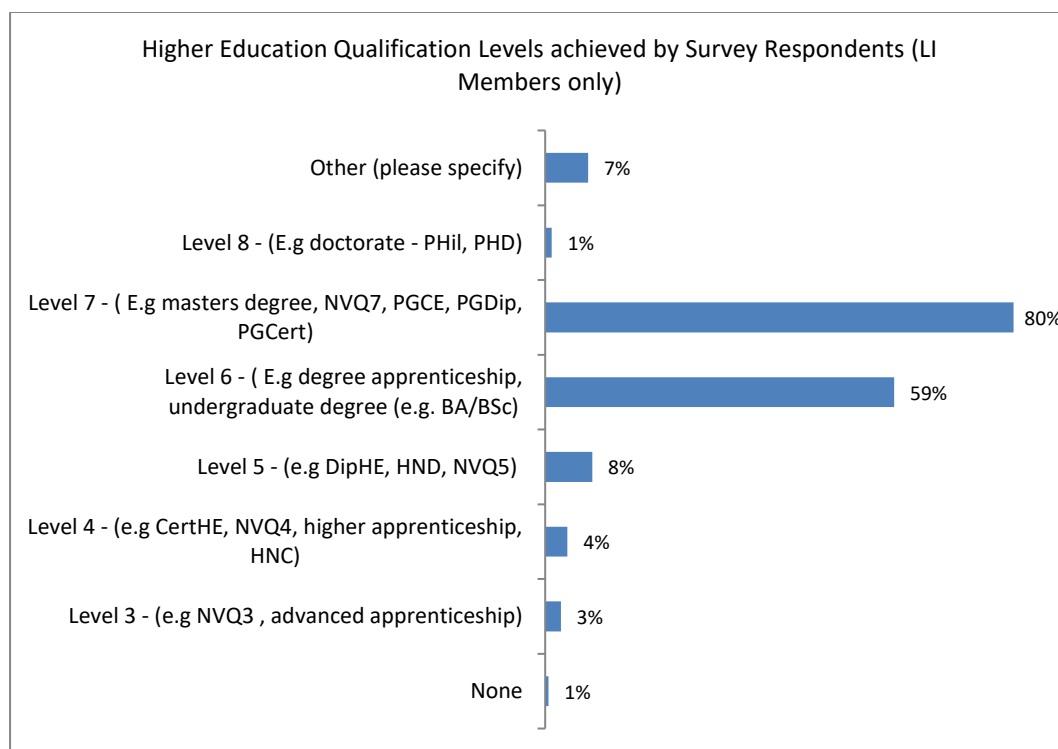
The main roles employed by respondent organisations on a freelance or contract basis are ecologists, arboriculturalists/tree surgeons and engineers. Almost one third will also employ landscape architects on a freelance basis. Public sector bodies are significantly more likely to employ biodiversity specialists and environmentalists compared to the overall sample.

3.1.7.4 Landscape Professionals in Company



Base: 645 LI member respondents

3.1.8 Education Level of Respondents



Base: 711 LI members

Members are most likely (80%) to have achieved a level 7 qualification such as a master's degree or a level 6 qualification (59%) such as an undergraduate degree.

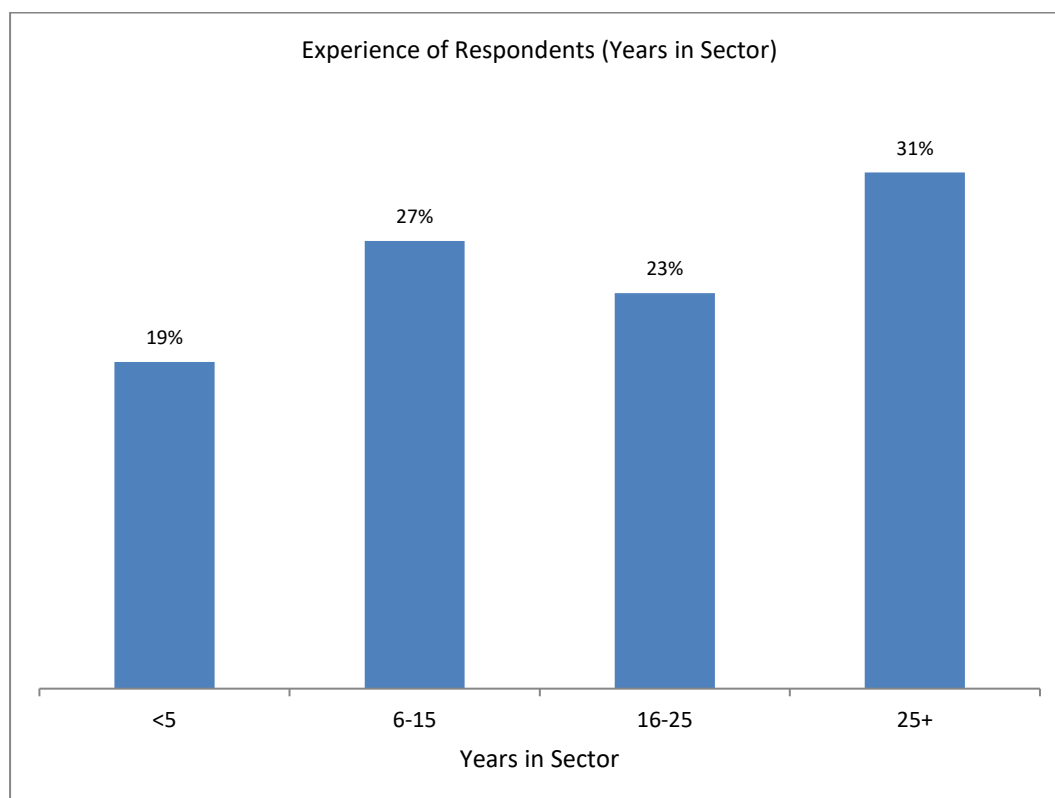
3.1.8.1 Subjects Studied by Members

Education level	Subject Studied (Sample)
Level 6	"BSc Hons Agriculture, Forestry and Rural Economy""BA Hons Landscape Architecture""BA Fine Art""Landscape Architecture- Ba Hons""Geography""Social Science""BA (Hons) Landscape Architecture with Planning""Ba (Hons) Garden Art and Design""BSc Hons Ecology"
Level 7	"PG Diploma Landscape Architecture"" Landscape Architecture Conversion Degree and PGDip""MA Landscape Architecture""PGCE - Geography teacher, MSc landscape studies""BA HONS dip LA LANDSCAPE ARCHITECTURE""MSc Environmental Assessment and Management""PgDip Landscape Architecture / MRes Inter-Disciplinary Urban Design""Environmental Management MSc & Landscape Architecture PGDip""MSc Landscape Architecture""Architecture PG Dip, Architecture BA (Hons)""MSc Engineering Project Management"

3.1.8.2 Studying Institutions by Members

Education level	Institution
Level 6	Manchester Met; The University of Liverpool ; Lancaster University; Manchester Polytechnic; Durham Uni; University Kassel, Germany (& Royal Architecture School, Copenhagen, Denmark); University of Gloucestershire ; University of Reading; University of Leeds; Gloucestershire College of Art and Design; University of Agricultural Sciences and Veterinary Medicine Cluj-Napoca; Cardiff University; University of Plymouth; Bradford ; University of North Wales, Bangor; RHS; Writtle University College; University of Chester
Level 7	Leicester; The University of Manchester; Cranfield University; Sheffield Uni, University of London; Uni of Gloucestershire; Edinburgh College of Art; Oxford University; Glyndwr University; Newcastle University; Wye College, University of London; MMU - Manchester; Open University; Writtle College; Warwick Business school

3.1.8.3 Experience of Respondents



Base = 712 LI Member Survey Respondents

31% of member respondents to the survey have more than 25 years landscape experience; 54% over 16 years' experience; and 81% over 5 years' experience.

3.1.9 Landscape Management versus Design-Led Respondents

We have identified from the data a subset of respondents who identify themselves in terms of their skills as more Management-led than Design-led.

Management-led respondents are much more likely to be non-members of the Landscape Institute than Design-led respondents, 37% of the strong Design-led sub-group compared to only 6% for the strong management led sub-group.

Management led professionals are also significantly more likely to be older:

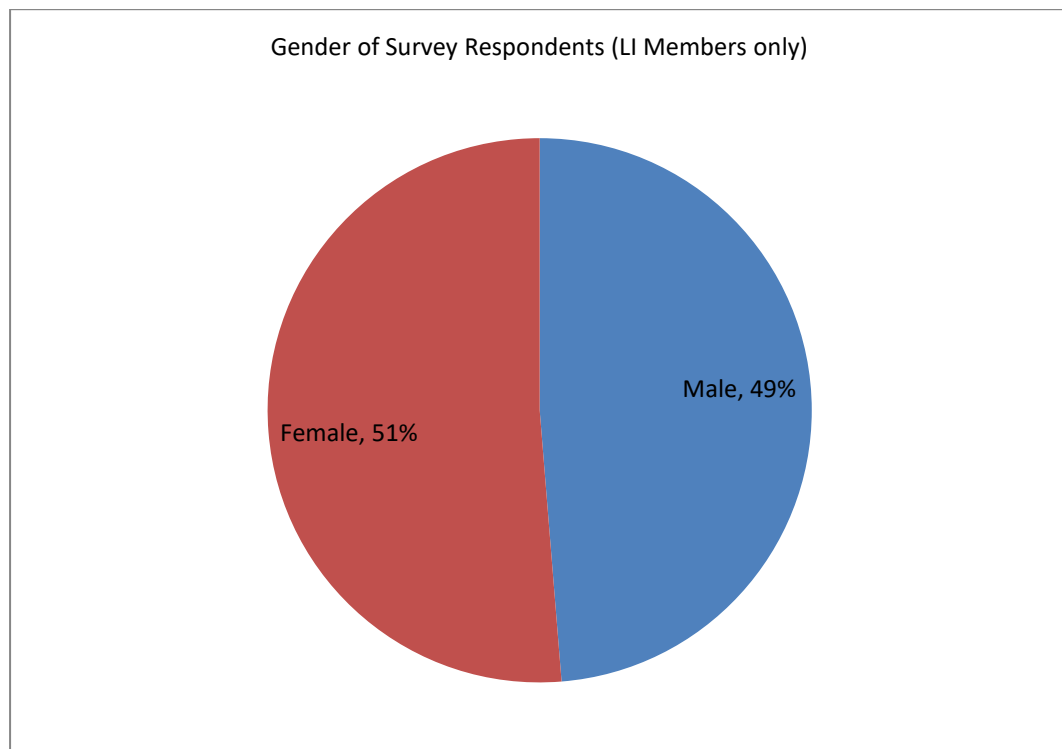
- Only 7% of under 35s are management-led, compared to 42% of the Design-led respondents
- 17% of 56-64-year olds are management led in comparison to 22% of Design-led

There is no difference in gender profile between the different skill focuses, and management led are more likely to be in a consultancy or advisory role and are more likely to work in public sector than in private practice.

3.1.10 Demographics

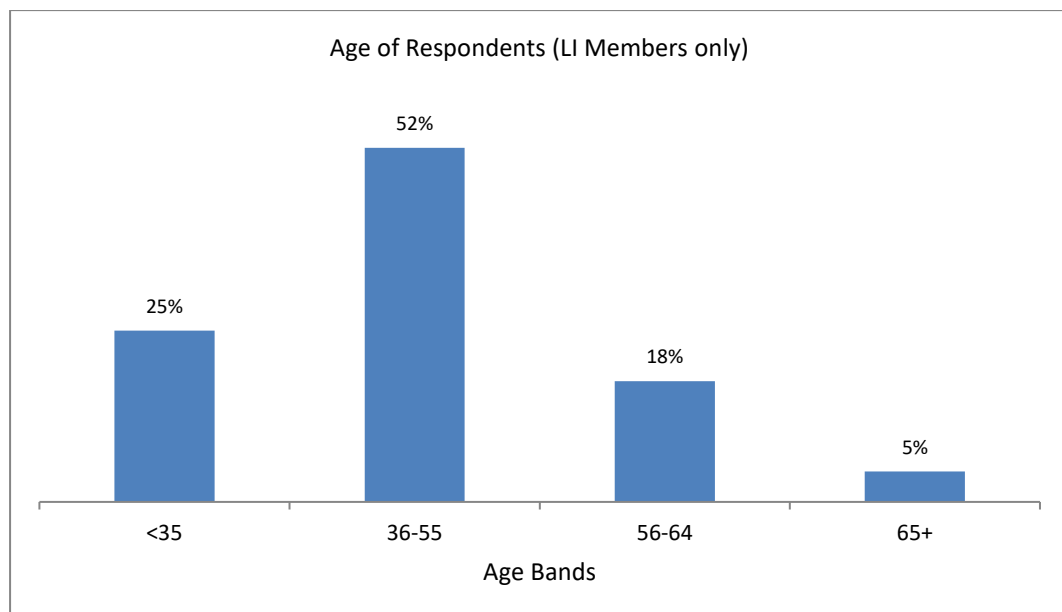
Respondents were asked to indicate their gender and age, with the results show below:

3.1.10.1 Gender of Respondents



Base = 507 LI Member Survey Respondents

3.1.10.2 Age of Respondents

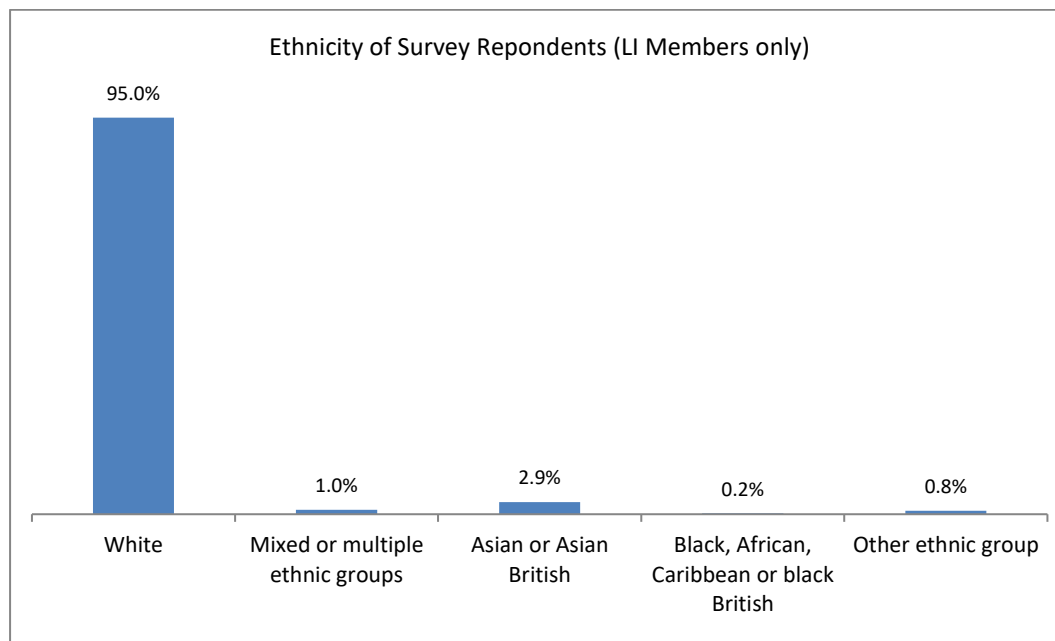


Base: 509 LI Member Survey Respondents

3.1.11 Diversity and Inclusion

3.1.11.1 Ethnicity

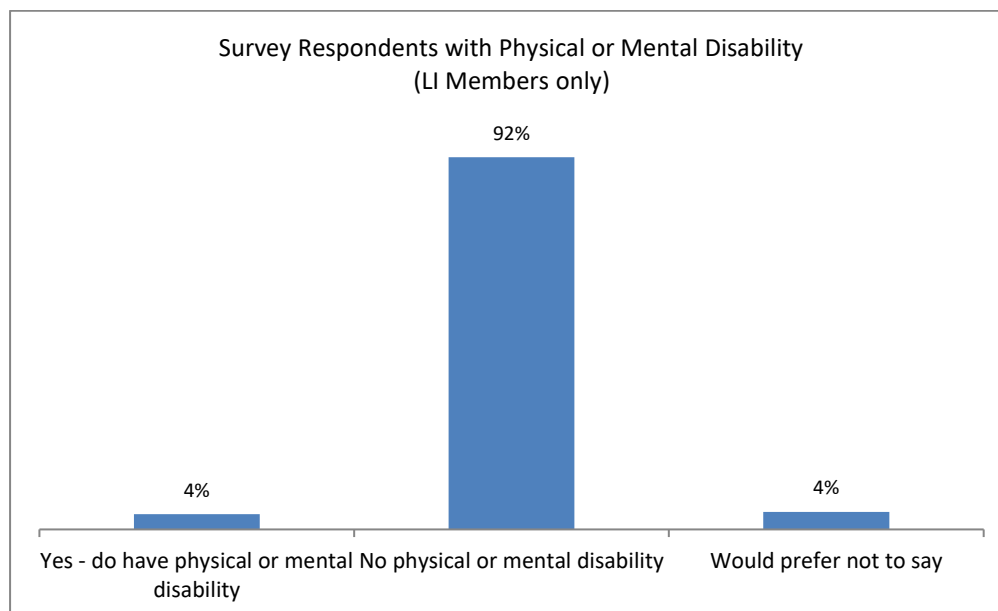
Respondents were asked to indicate their ethnicity. Where responses were received (this was an optional question), results are shown below:



Base: 479 LI Members responding to this question in the survey

3.1.11.2 Disability

Respondents were asked to indicate whether they had any physical or mental disability, with the results show below:

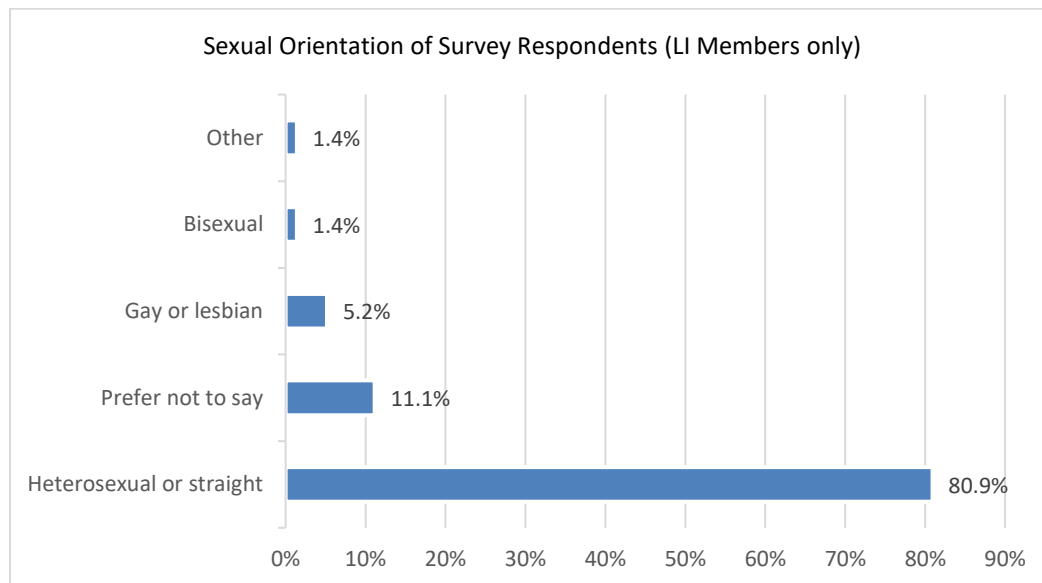


Base: 506 LI member survey respondents

It is difficult to compare the membership base with the UK population, because the numbers used for classification include people with a longstanding illness, disability or infirmity, and who have a significant difficulty with day-to-day activities. However, the government family resources survey estimates that 18% of the working age population is disabled.

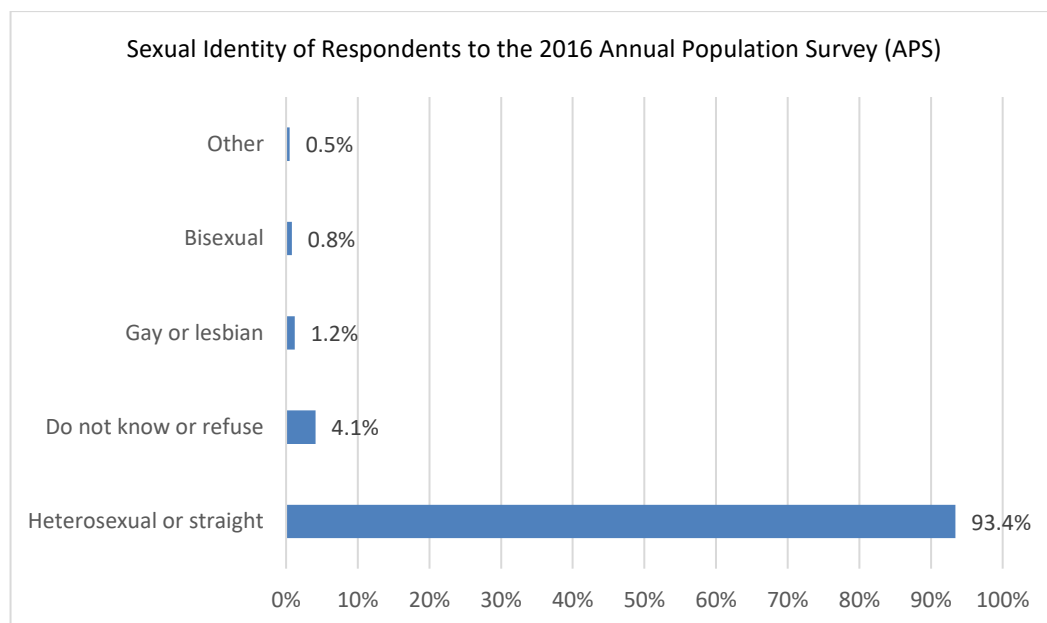
3.1.11.3 Sexual Orientation

Survey respondents were asked to indicate their sexual orientation, with the results show below for LI Members:



Base: 503 LI Members responding to this question

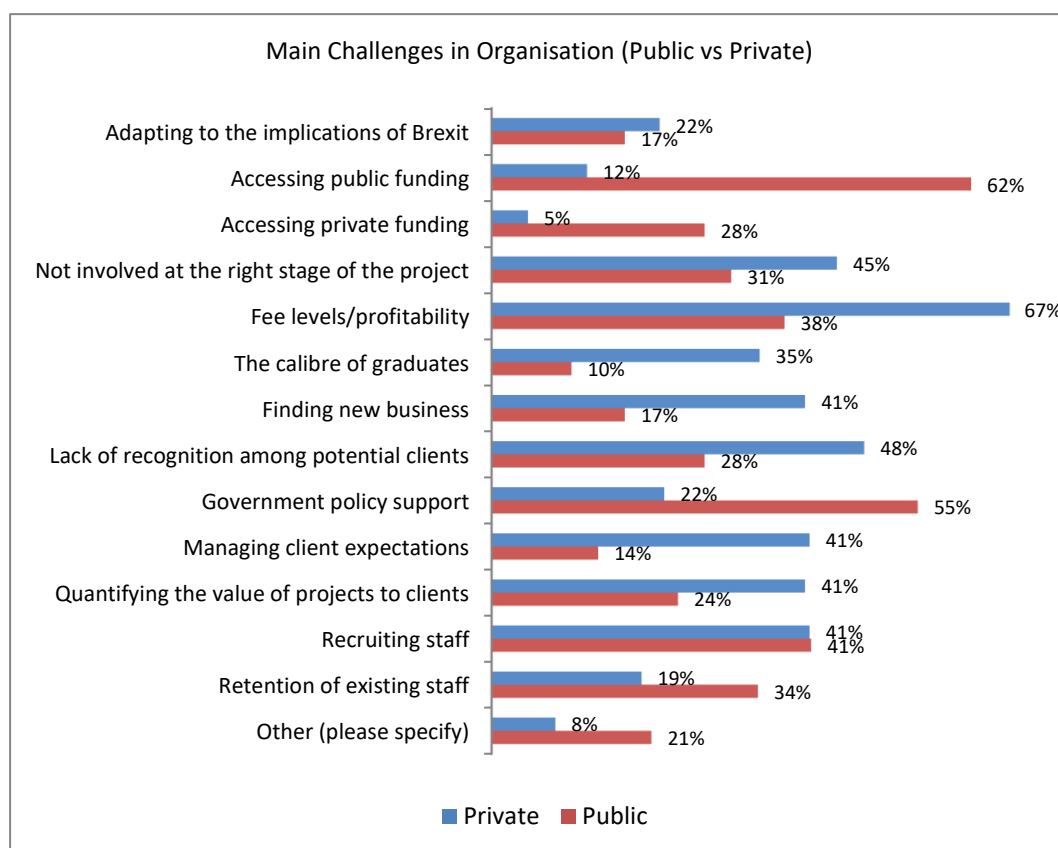
For comparison, with the UK population, we have provided the following graph from the Office of National Statistics:



Source: Office for National Statistics:

<https://www.ons.gov.uk/peoplepopulationandcommunity/culturalidentity/sexuality/bulletins/sexualidentityuk/2016>

3.2 Key Challenges faced by Practices



Base: 199 Practice Heads (Public and Private)

The top challenge for organisations in the profession is with fee/levels and profitability, and in many ways, this goes hand in hand with the second and third challenges of lack of recognition among potential clients and not being involved at the right stage of the project.

These issues were highlighted by anecdotal comments:

"I work in a multi-discipline practice and I'm aware of what will happen on projects and landscape is often one of the ones bottom of the list and it will be the one to have its budget cut first".

"The reality of projects is that the focus is on what the client wants and where the client is going to spend their money and focus their money and it isn't always on the landscape"

Public funding and government policy support are much more important challenges for public sector respondents. As is retention of existing staff. Private sector organisations are more concerned with managing client expectations and quantifying the value of projects to clients.

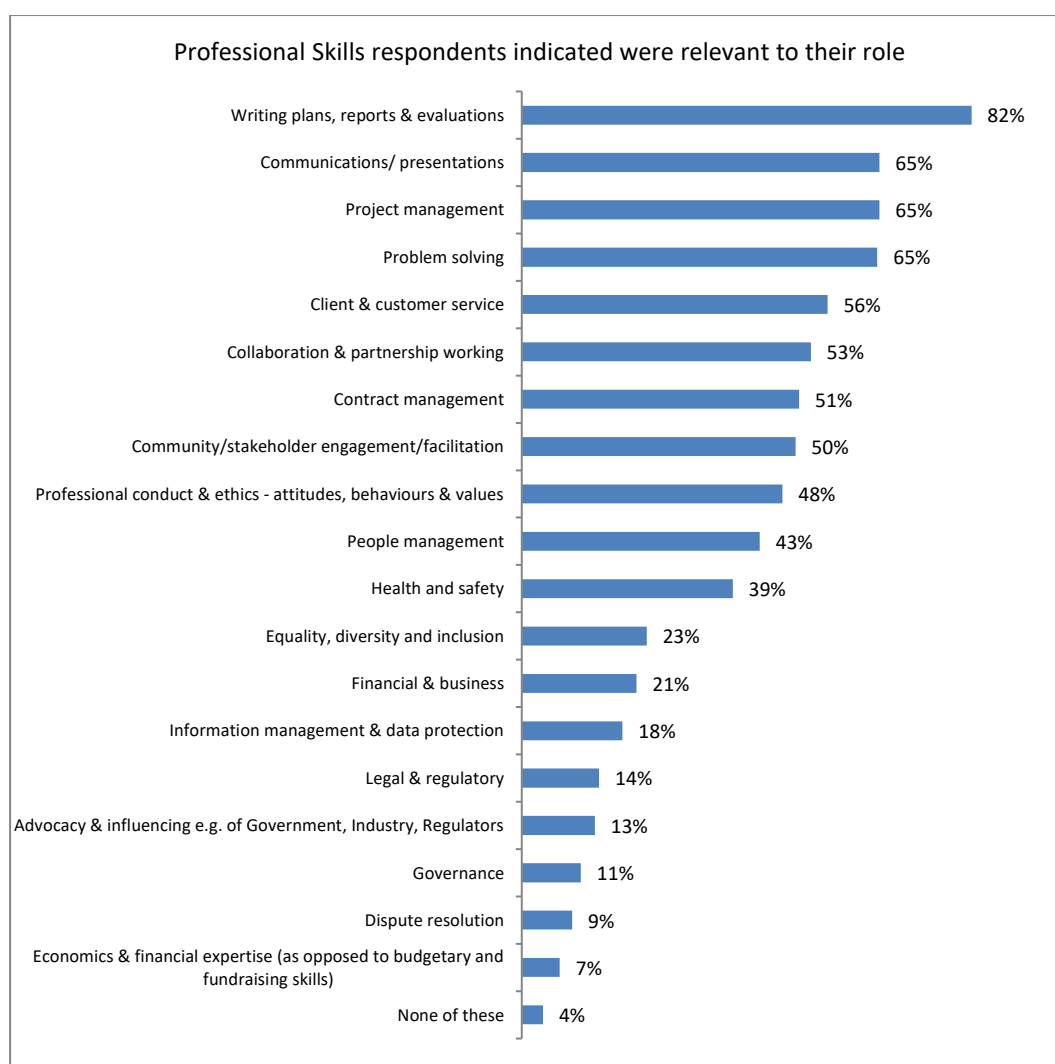
3.3 Skills Requirements of the Modern Practice

To determine sector skills and competencies, questions were framed to allow the respondent to demonstrate which skills they have sufficient knowledge expertise and experience of to provide as part of a professional service.

3.3.1 General Skills

All respondents were asked to indicate the relevant professional, educational and digital skills relevant to / required by their role:

3.3.1.1 Professional Skills



Base: All Respondents (750)

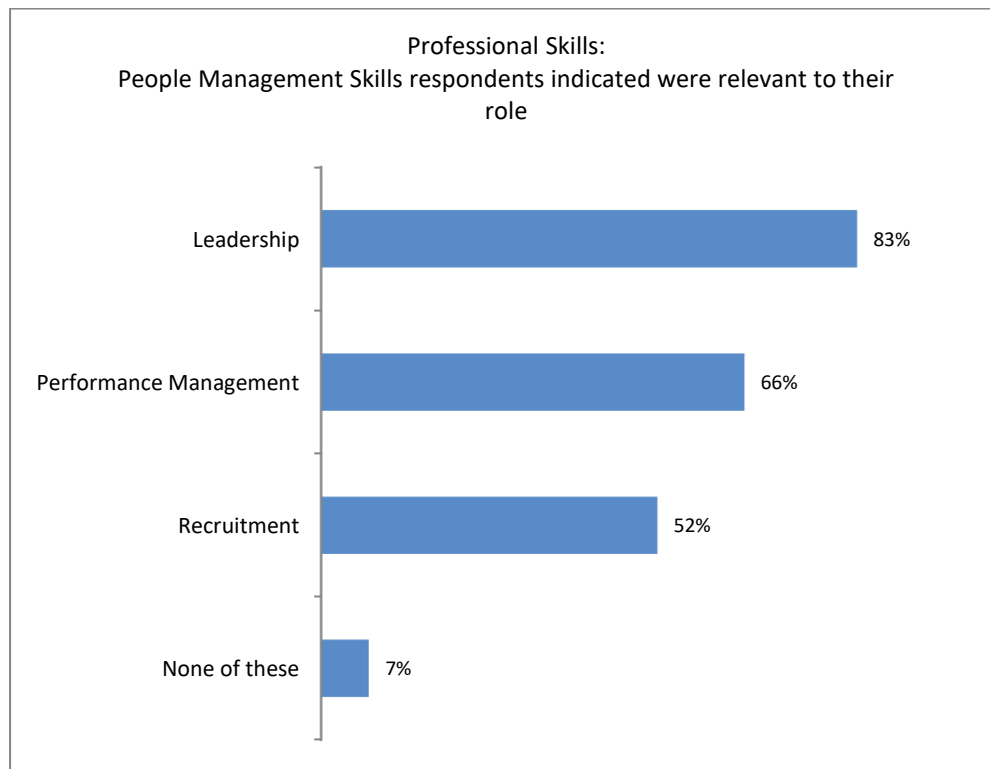
The top professional skill recognised as being relevant was that of “Writing plans, reports and evaluations” (82% of all respondents). Communication/presentation skills, Project management skills and problem solving were also key skills, recognised by 65% of all respondents.

In addition, respondents were asked more detailed questions regarding the following skills, if they felt they were relevant:

- People Management skills (43% of respondents)
- Finance and Business skills (21% of respondents)
- Legal and Regulatory skills (14% of respondents)

These results are summarised below.

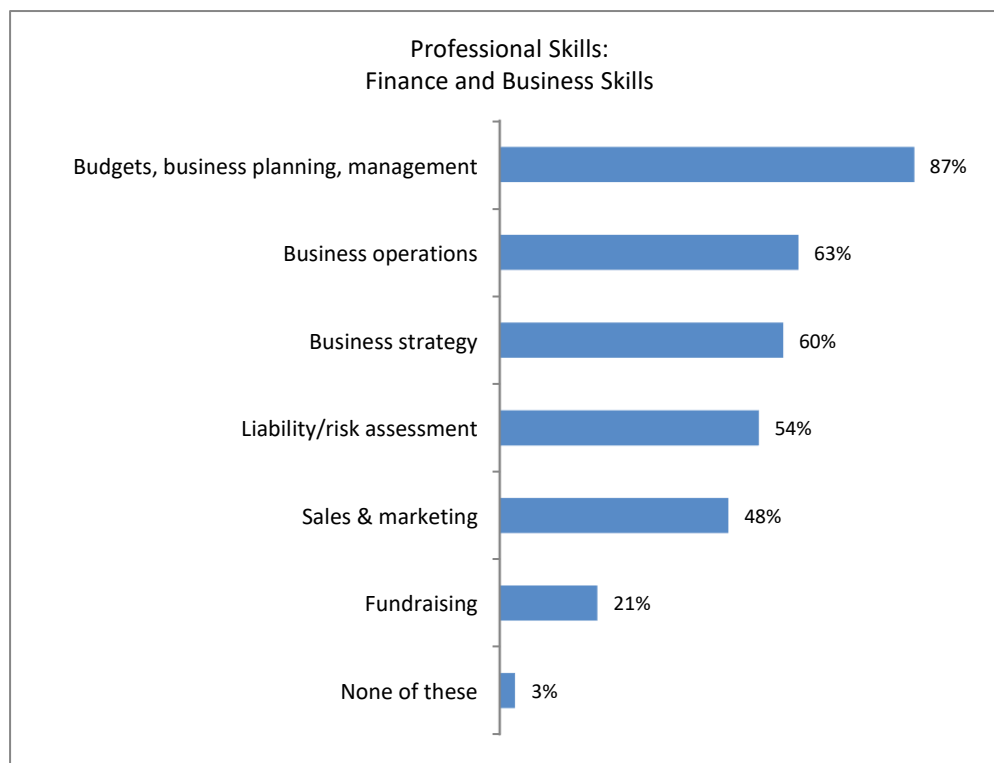
3.3.1.1.1 People Management Skills



Base: All Respondents who selected people management in the Professional Skills question (325)

Leadership was the people management skills most recognised by respondents as being relevant.

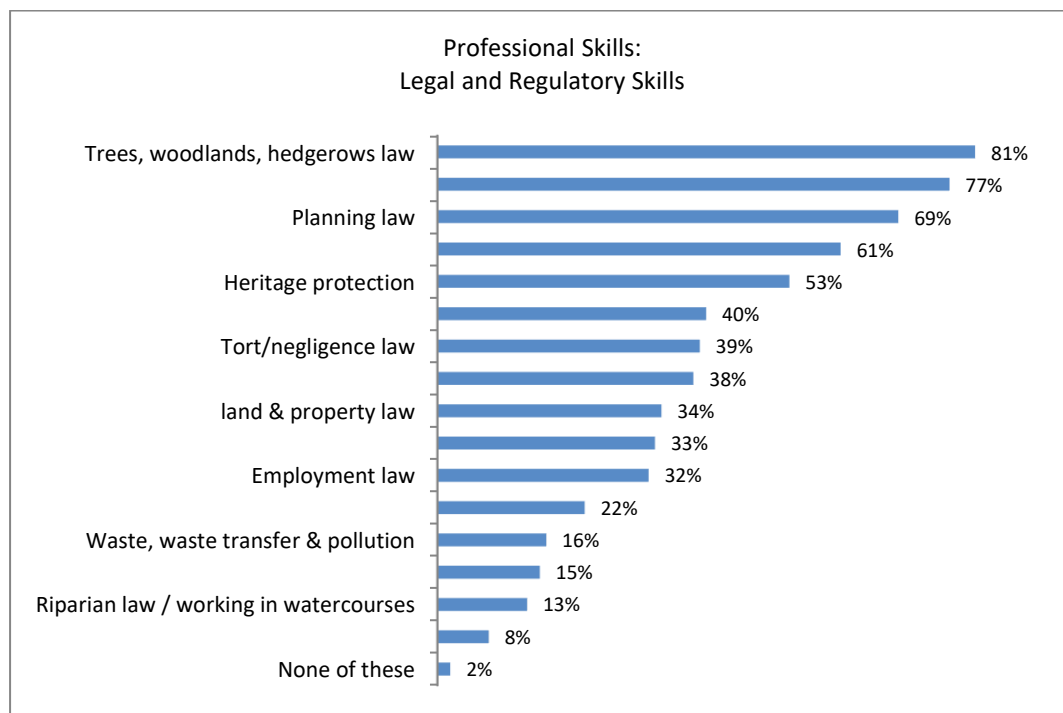
3.3.1.1.2 Finance and Business Skills



Base: All Respondents who selected Finance and Business in the Professional Skills question (156)

Budgets, business planning and management were the finance and business skills most recognised by respondents as being relevant.

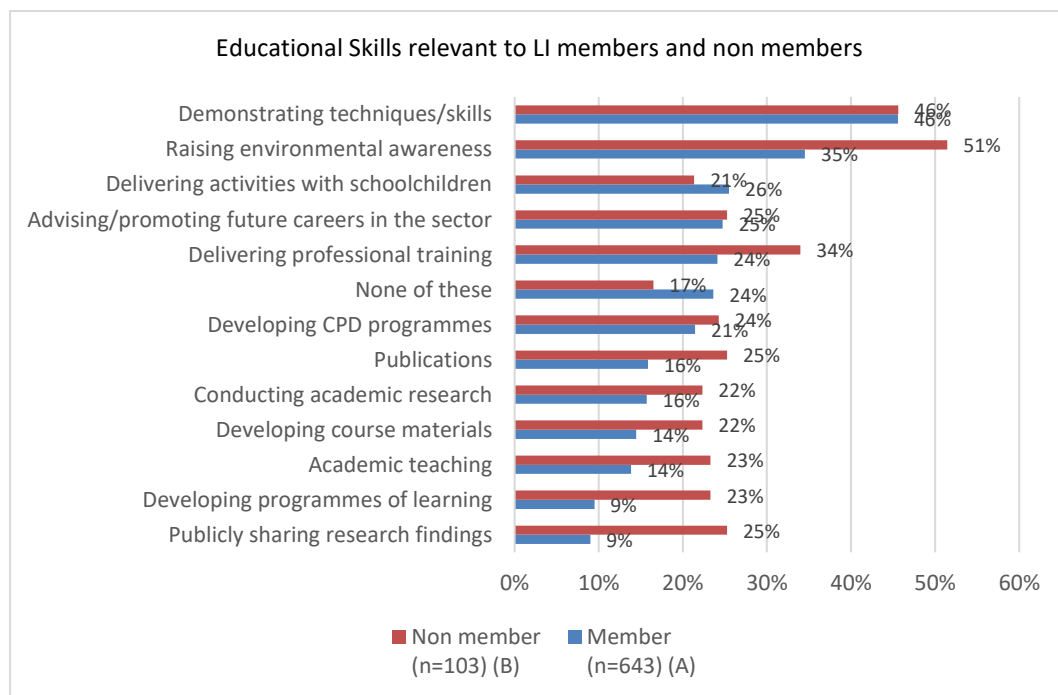
3.3.1.1.3 Legal and Regulatory Skills



Base: All Respondents who selected Legal and regulatory in Professional Skills question (104)

3.3.1.2 Educational Skills

All respondents were asked to indicate the Educational skills that were relevant to their role:



Base: All Respondents (746)

The main educational skills recognised as being relevant were:

- Demonstrating techniques/skills (46% of respondents)
- Raising environmental awareness (37% of respondents)

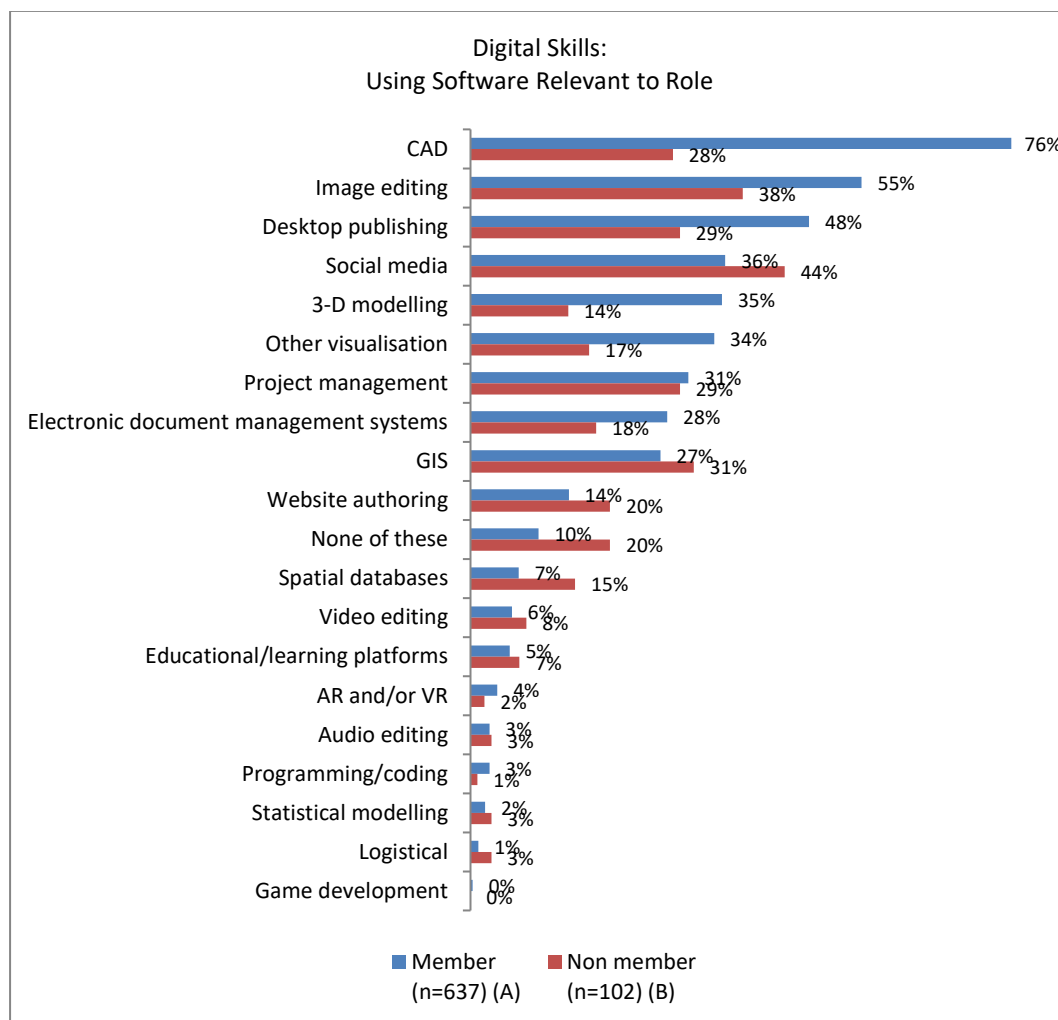
Non-members demonstrate more skills in raising environmental awareness and delivering professional teaching. The range of skills appears broader for non-members than members.

3.3.1.3 Digital Skills

All respondents were asked questions relating to their Digital Skills in the following categories:

- Using software relevant to their role
- Using equipment relevant to their role
- Digital collaboration

3.3.1.3.1 Using Software Relevant to Role



Base: 637 LI member respondents and 102 non-member respondents

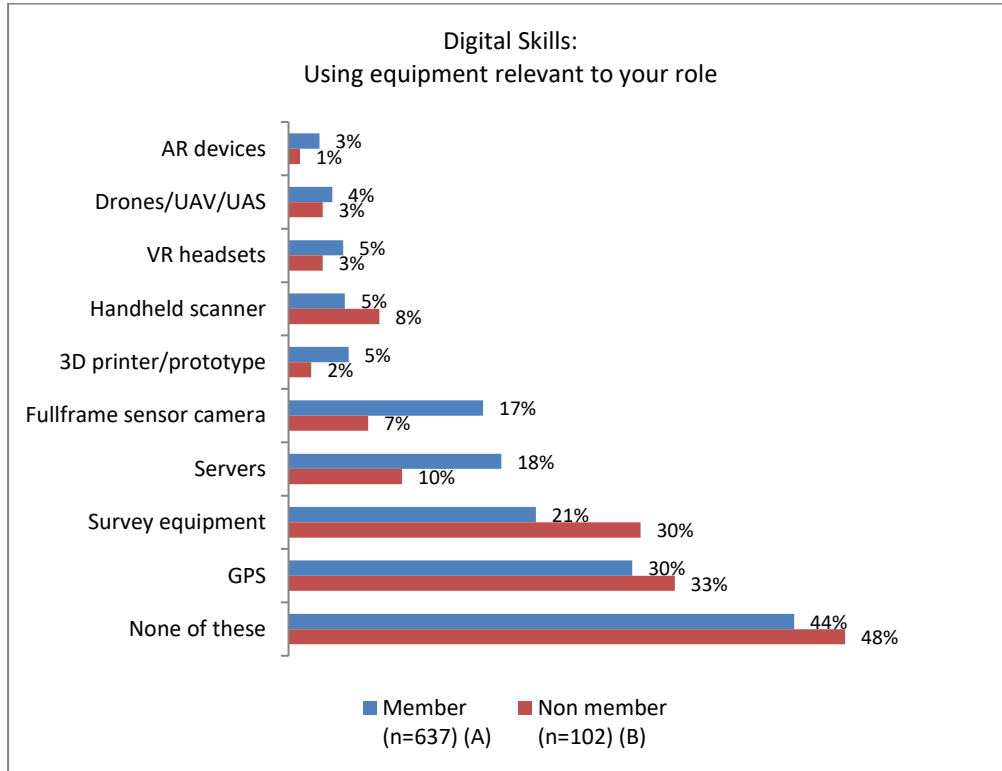
CAD skills were recognised as being relevant to 76% of member respondents but only 28% of non-member respondents, within whom social media software was the most relevant software skill (44% of respondents).

Software skills relating to Image editing, desktop publishing, 3D modelling and other visualisation tools were notably more recognised by member respondents than non-member respondents.

20% of non-members indicated that none of the listed skills were relevant, in comparison with 10% of members.

It must be again stressed that the sample size from non-members was significantly smaller than that for members, so these comparisons need to be reviewed with caution.

3.3.1.3.2 Using Equipment Relevant to Role

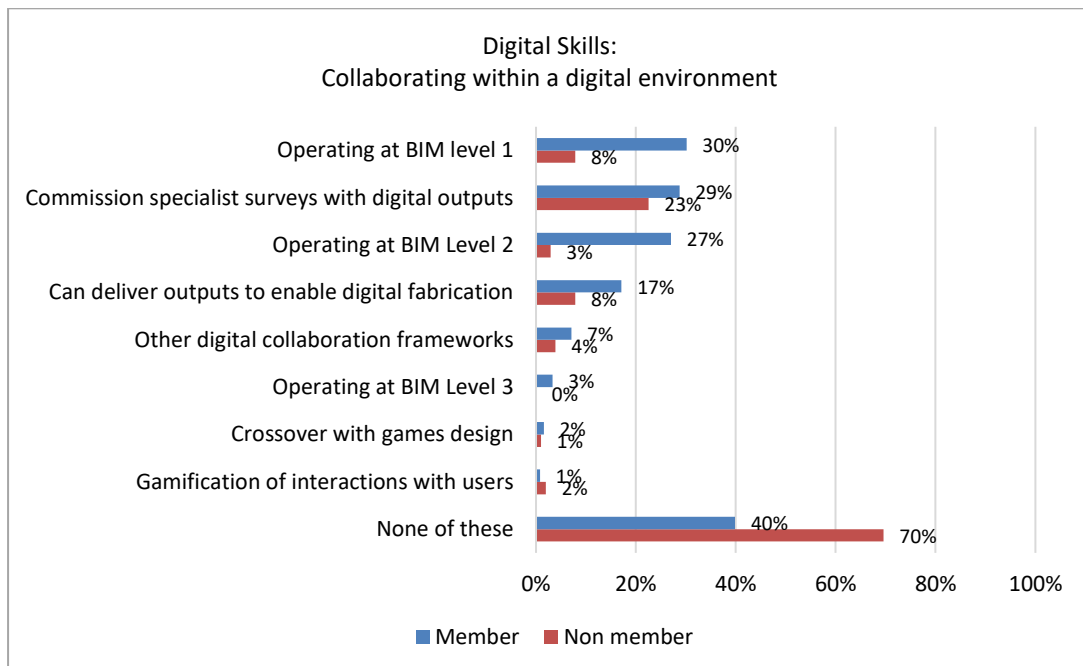


Base: 637 LI Members and 102 Non-Member Respondents

The responses suggest that non-members are more likely than members to use survey equipment in their role, while servers and full frame sensor cameras are more likely to be used more by members than non-members.

This relatively short series of questions was presented to all respondents and therefore would explain the high number who selected “None of these”

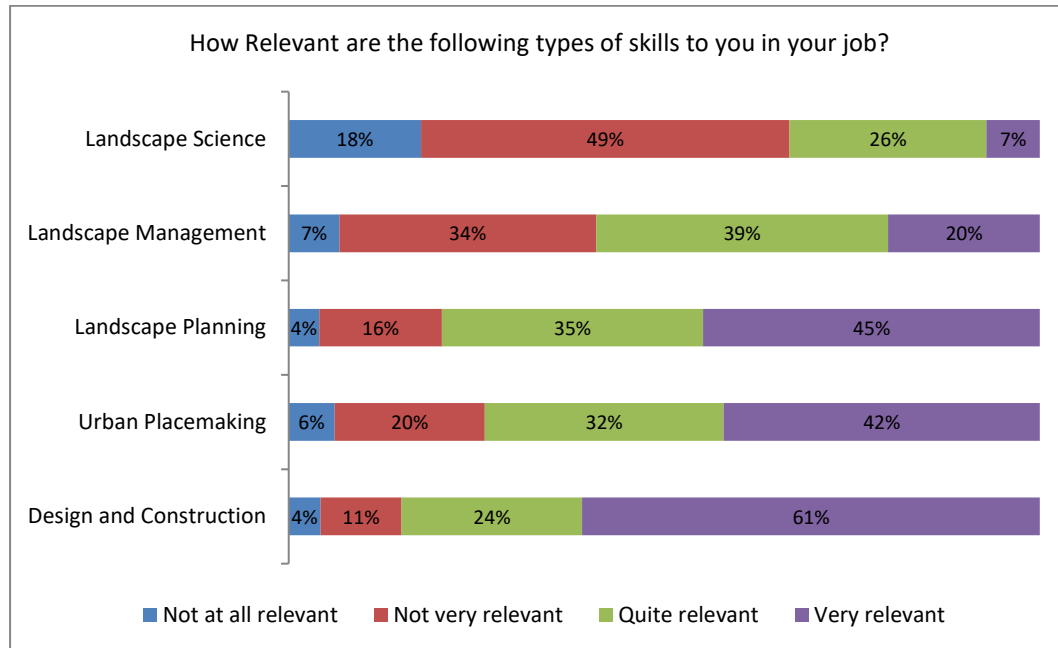
3.3.1.3.3 Collaborating within a Digital Environment



Base: 637 LI Member Respondents and 102 Non-Member Respondents

3.3.2 Specialist / Specialism-Focussed Skills

Skills were separated into sections and the respondents asked to determine the relevance of that type of skill (E.g. Landscape Design, Urban, Planning, Management, Science) to their role first before asking more detailed questions on individual skills.



Base: All respondents (740)

There is a strong focus in the research sample of professionals with a Landscape Design, Urban Design and Landscape Planning focus.

Design and Construction skills across the entire sample are very relevant for 61%, with a further 24% seeing them as quite relevant to their job role.

Urban Placemaking skills across the sample are relevant for almost three quarters of respondents, demonstrating the importance of this skill-set to the research sample.

Landscape Planning is also an important skill set recognised by almost 80% of the respondents. Only 20% of the sample see the Landscape Management skill set as being very relevant to their job role and landscape Scientists are much less represented in the sample, with only one third seeing these skills as relevant.

There is an overlap in skills between different subsets of reported skills – for example:

- 92% of respondents who stated that Urban Design skills were relevant also stated that Design skills were relevant
- Landscape Management and Landscape Planning (91% overlap)
- Landscape Science and Landscape Planning (90% overlap)
- Landscape Science and Landscape Management (87% overlap)

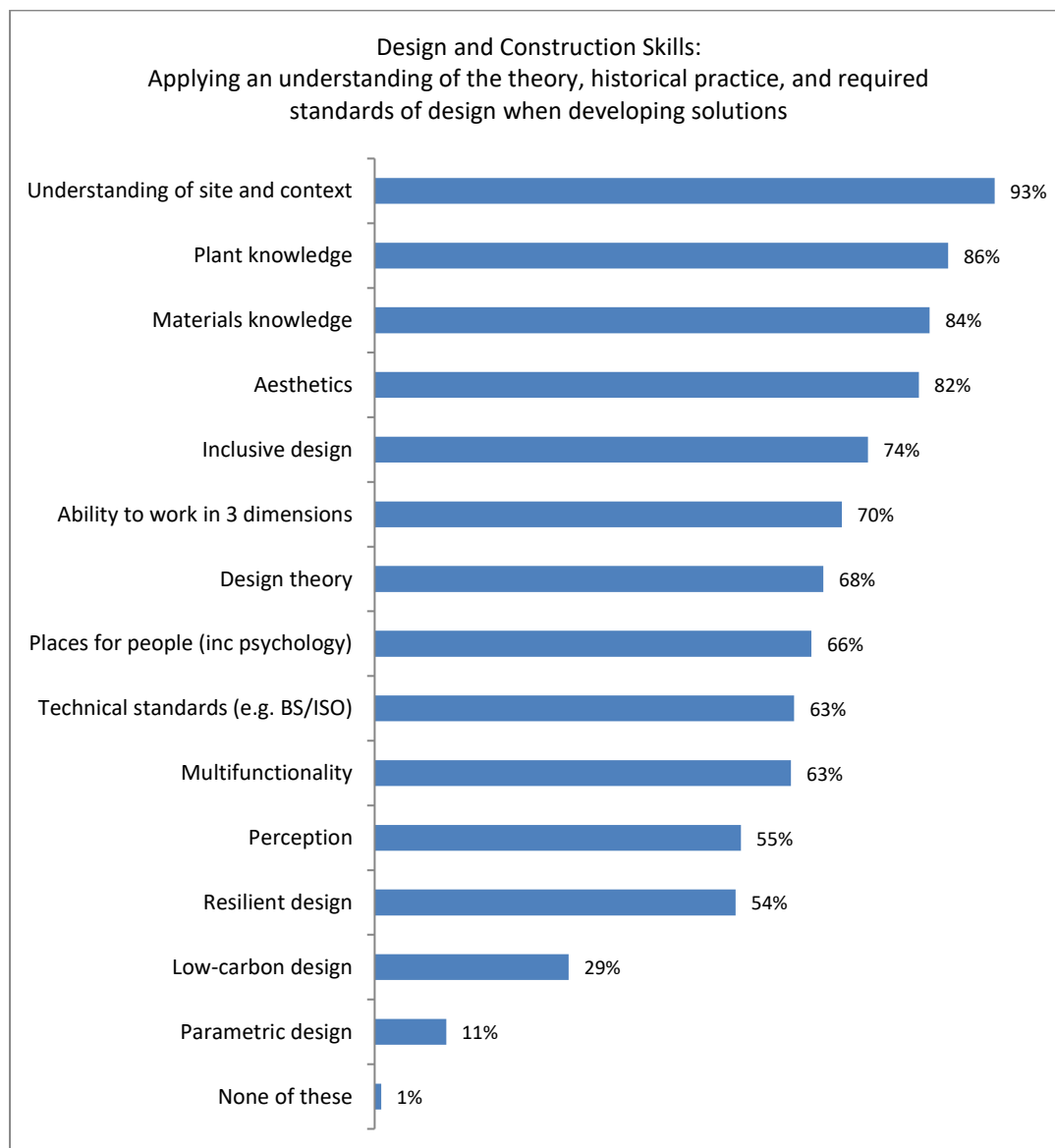
3.3.2.1 Design and Construction Skills

Design and Construction skills questions were only asked to respondents who stated that these skills were relevant to their role.

85% of all respondents saw these skills as either quite relevant or very relevant, and they were subsequently asked to indicate the relevance of specific skills within the following categories:

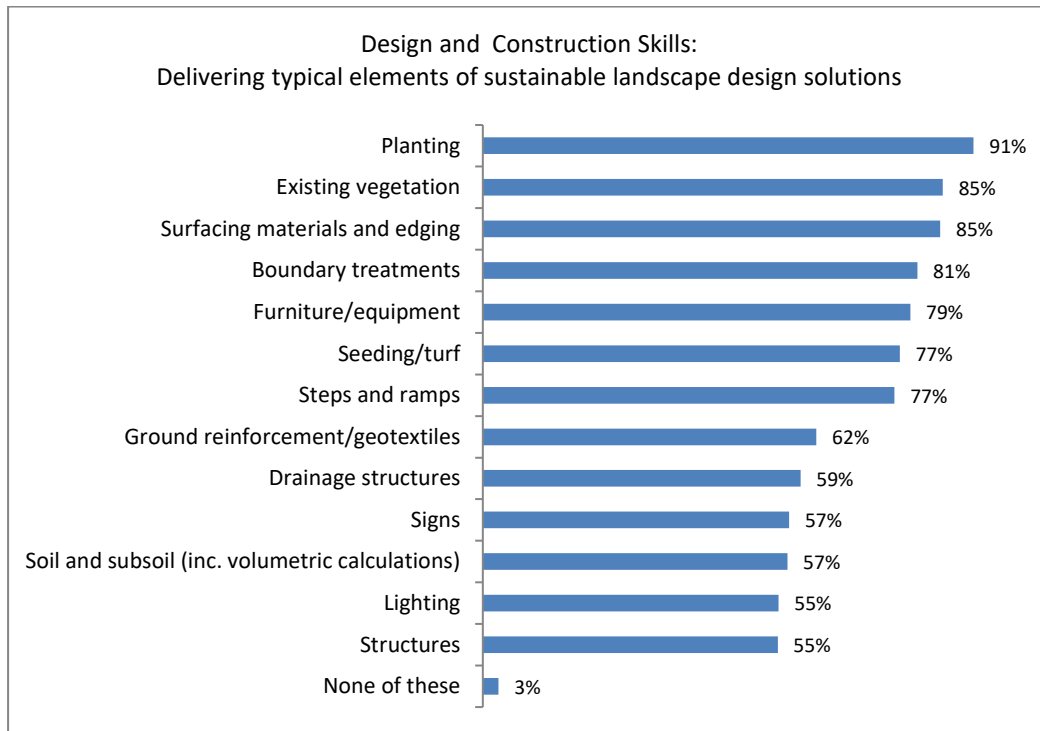
- Applying and understanding of the theory, historical practice, and required standards of design when developing solutions
- Delivering typical elements of sustainable landscape design solutions
- Delivering landscape engineering solutions
- Using Non-Digital Techniques to convey design solutions
- Supervising Landscape Implementation
- Delivering design solutions in one or more of the following environments/contexts

3.3.2.1.1 Applying and Understanding of Theory



Base: Respondents who stated Design Skills were relevant to their role (613)

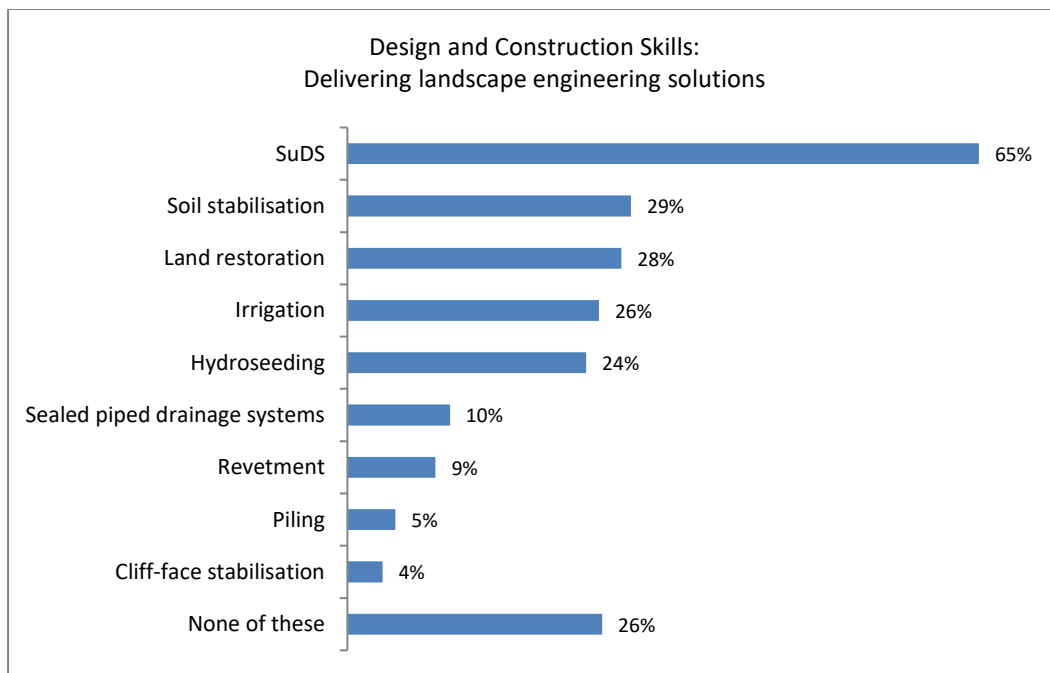
3.3.2.1.2 Delivering Elements of Sustainable Landscape Design Solutions



Base: Respondents who stated Design Skills were relevant to their role (613)

A broad range of skills were indicated as being relevant/used by respondents.

3.3.2.1.3 Delivering Landscape Engineering Solutions

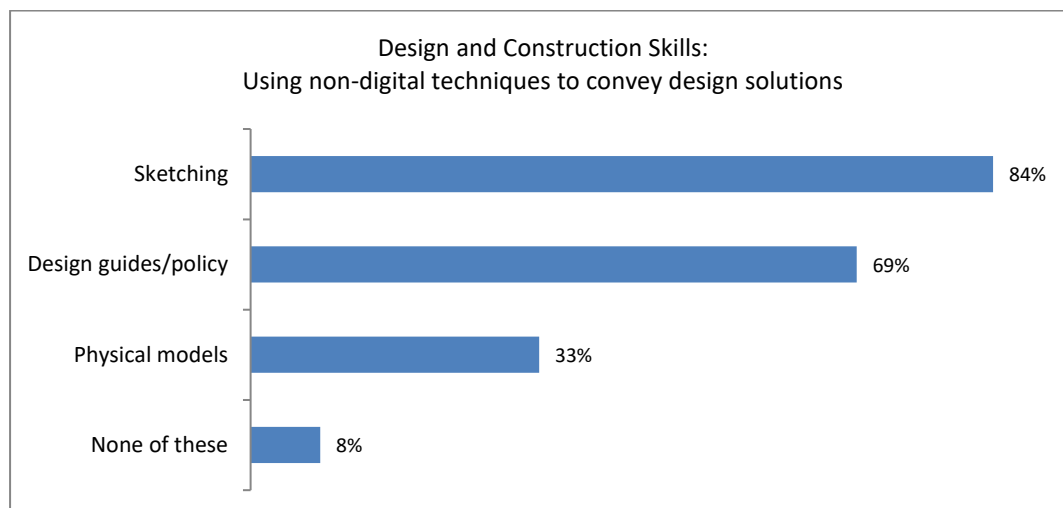


Base: Respondents who stated Design Skills were relevant to their role (611)

Skills related to Sustainable Drainage Systems were most recognised as being relevant/used by respondents (65%).

It was notable that 26% of respondents who stated that Design Skills were relevant to their role, did not recognise any of the skills listed relating to the Delivery of Landscape Engineering Solutions, which could suggest this is perhaps an area they are not involved in. On further investigation, these respondents tended to be less experienced or worked in larger organisations.

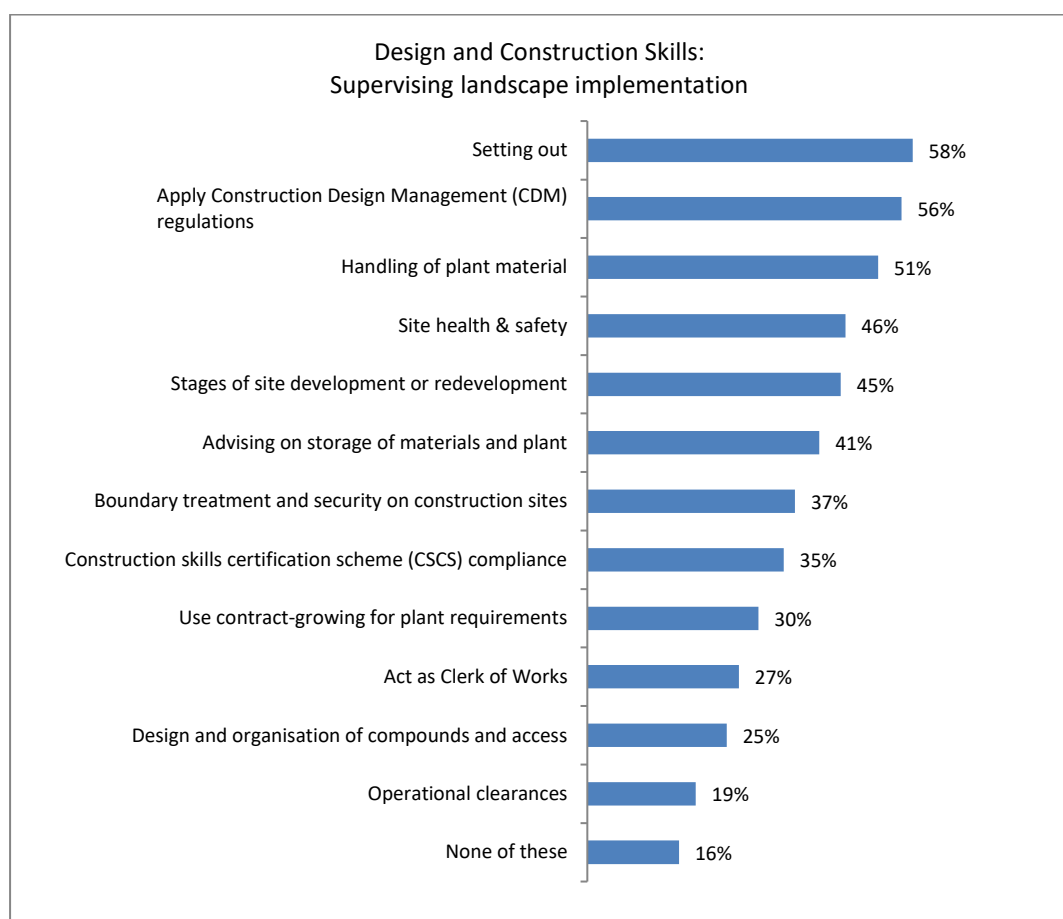
3.3.2.1.4 Using Non-Digital Techniques



Base: Respondents who stated Design skills as relevant to their role (611)

Sketching was the most recognised non-digital technique, being used by 84% of respondents, with design guides/policy also widely used (69% of respondents).

3.3.2.1.5 Supervising Landscape Implementation



Base: All respondents who stated Design skills as relevant to their role (605)

Setting out, applying CDM regulations and handling of plant material were the 3 skills most used skills, recognised by the majority of respondents.

16% of respondents did not recognise any of the skills listed relating to supervising landscape implementation – which could suggest that they were not involved in this area of work.

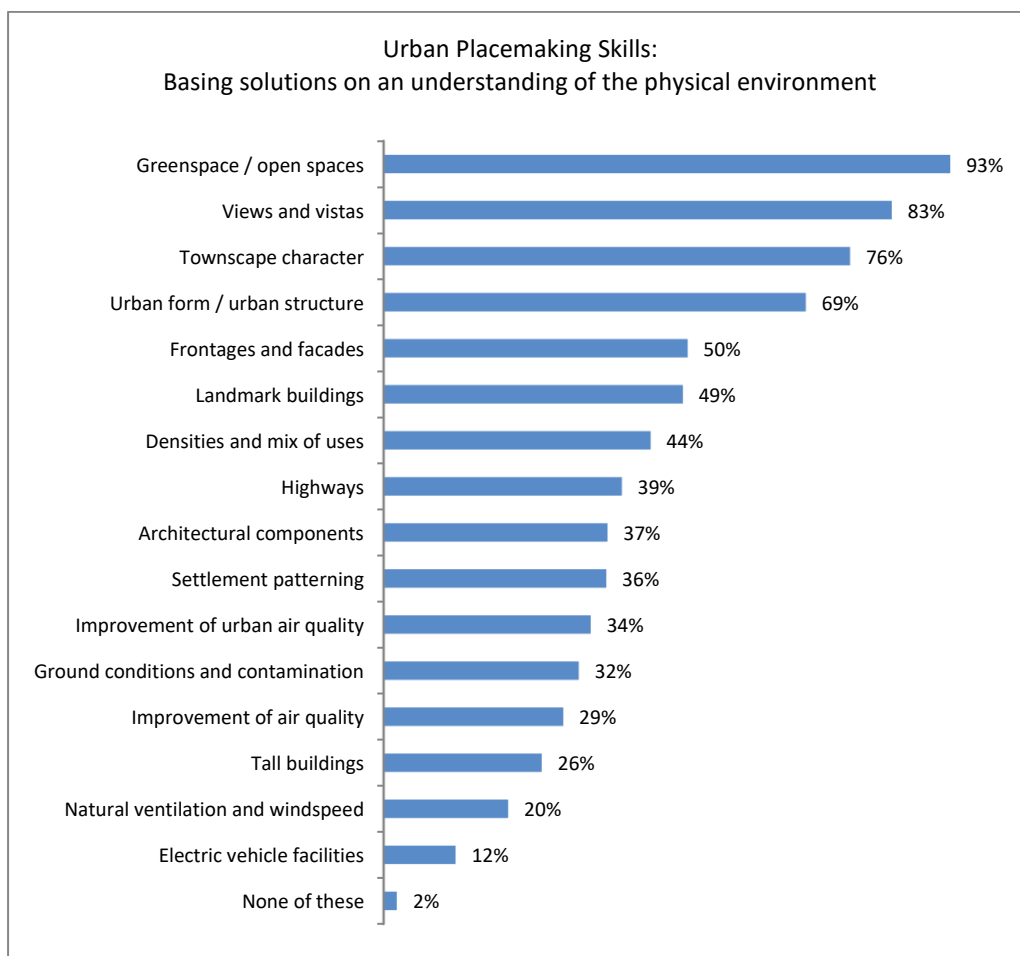
3.3.2.2 Urban Placemaking Skills

Urban Placemaking skills questions were only asked to respondents who stated that these skills were relevant to their role.

74% of all respondents saw these skills as either quite relevant or very relevant, and they were subsequently asked to indicate the relevance of specific skills within the following categories:

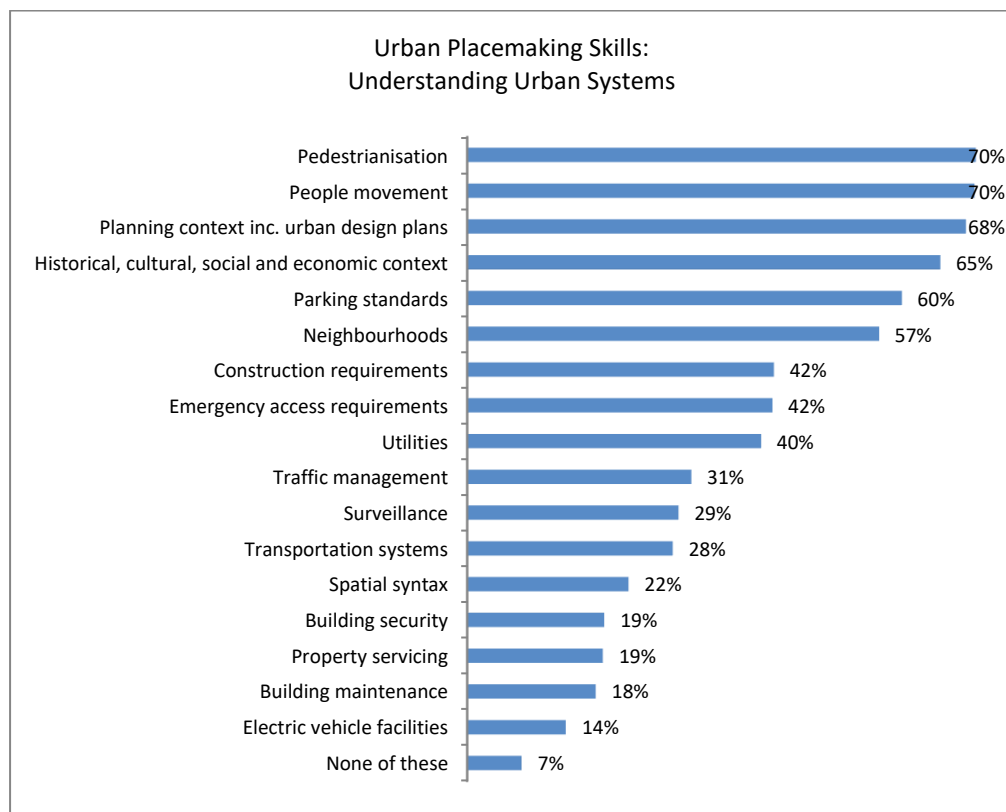
- Basing Solutions on an understanding of the Physical Environment
- Understanding Urban Systems
- Devising Solutions engaging local communities
- Devising Solutions which support economic objectives
- Devising Solutions which involve and support natural systems
- Devising solutions using a range of built-form and interventions

3.3.2.2.1 *Basing Solutions on an Understanding of the Physical Environment*



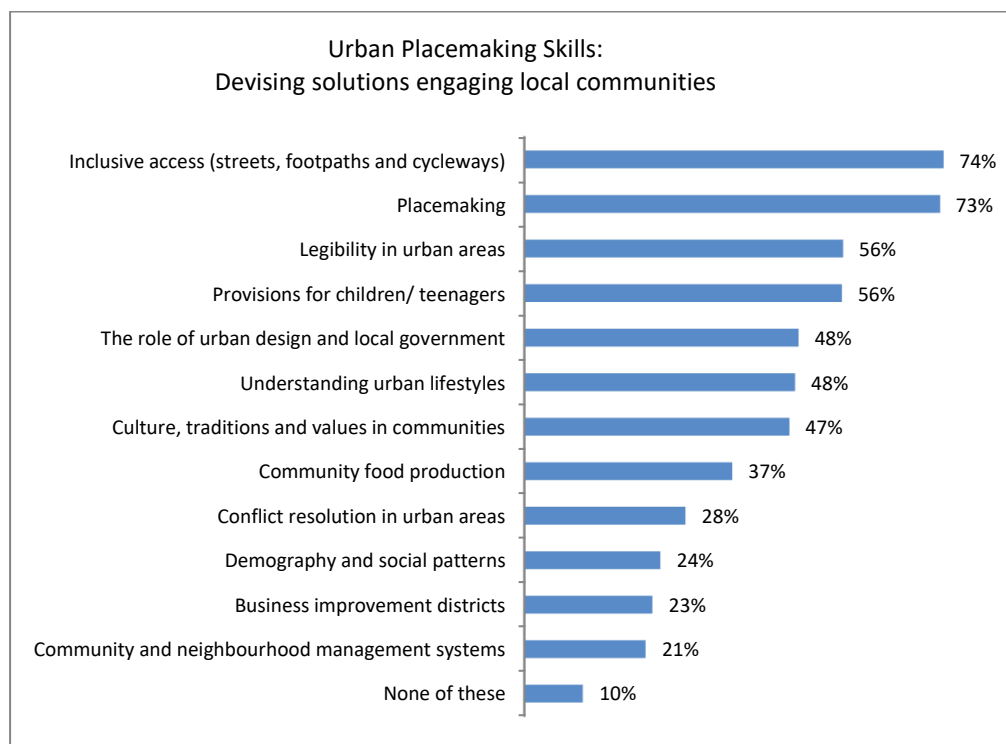
Base: All respondents who stated Urban Placemaking Skills were relevant to their role (511)

3.3.2.2.2 Understanding Urban Systems



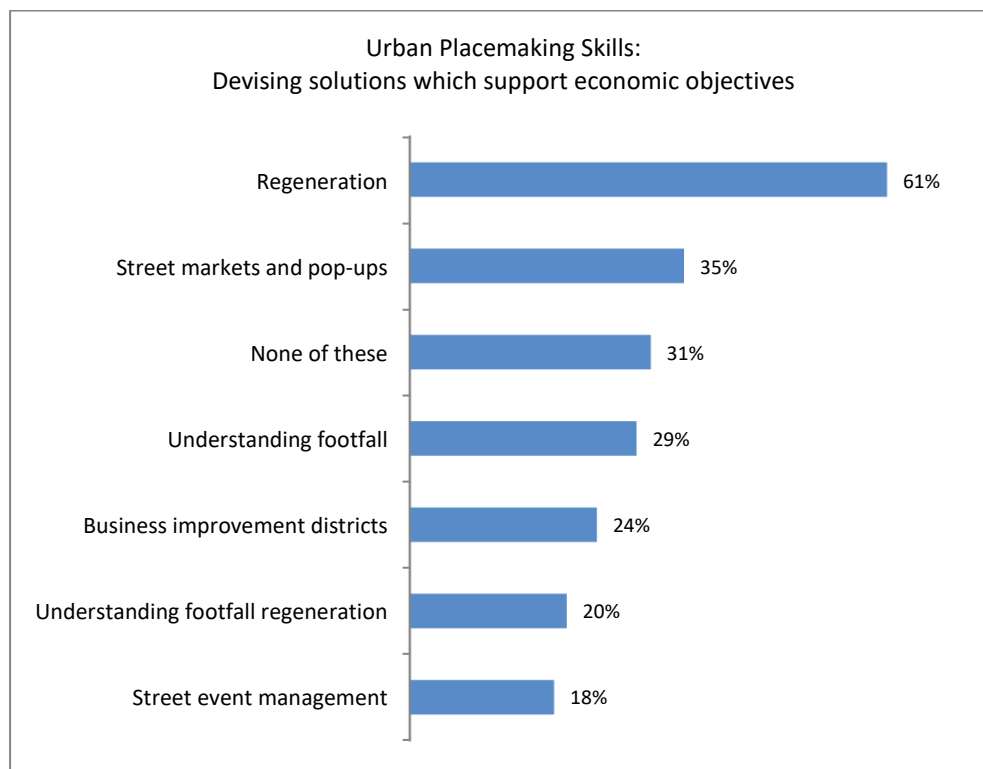
Base: All respondents who stated Urban Placemaking Skills as relevant to their role (511)

3.3.2.2.3 Devising Solutions to Engage Local Communities



Base: All respondents who stated Urban Placemaking Skills as relevant to their role (496)

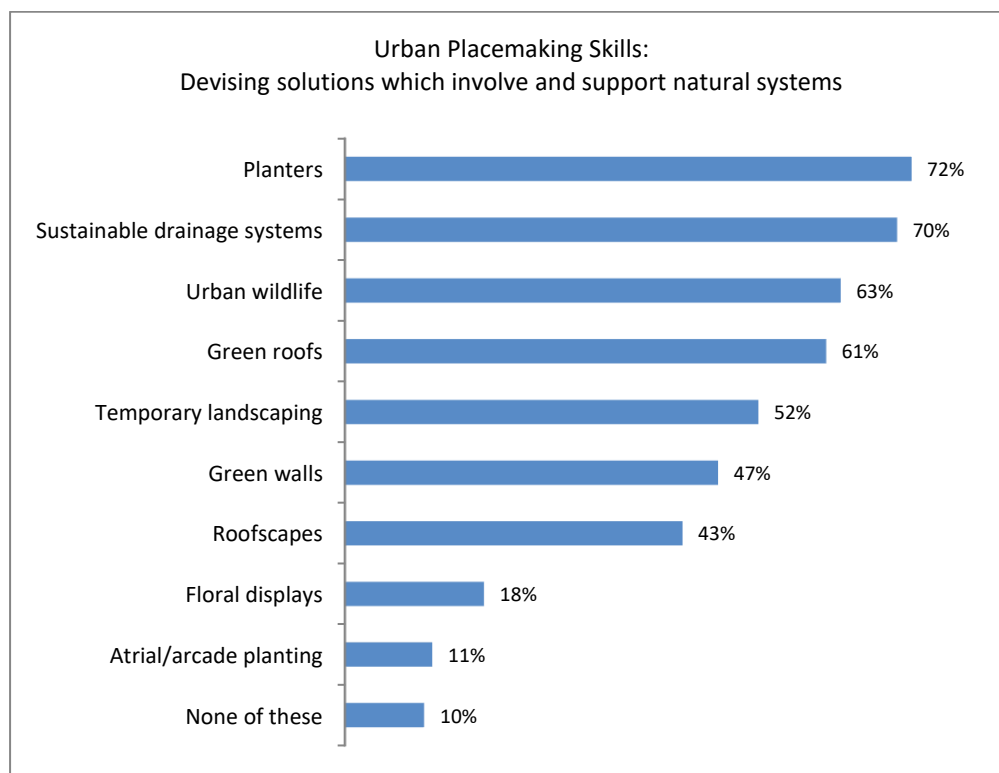
3.3.2.2.4 Devising Solutions Which Support Economic Objectives



Base: All respondents who stated Urban Placemaking Skills as relevant to their role (496)

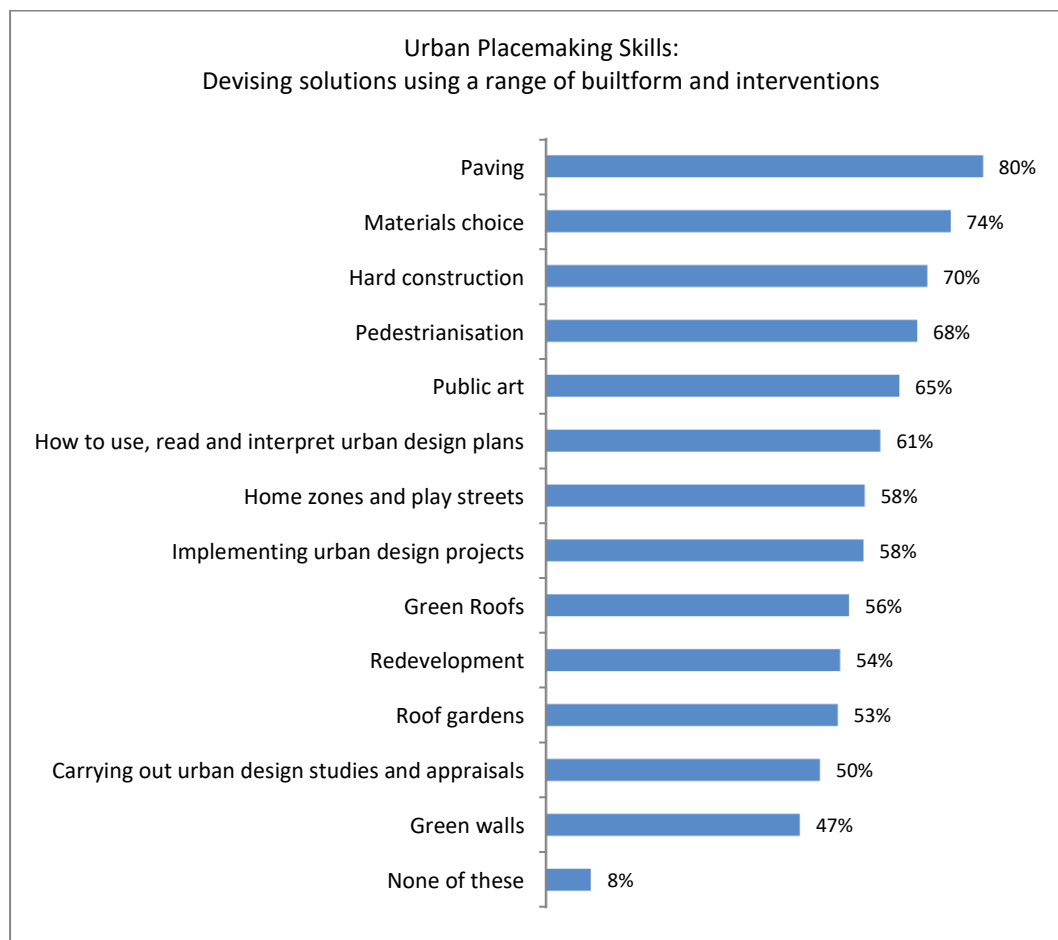
31% of respondents indicated that they did not recognise any of the listed skills, relating to designing solutions which support economic objectives, as being relevant to their role. This could suggest that such considerations are not relevant to their role. Member respondents in junior roles were also more likely to indicate none of these in this section.

3.3.2.2.5 Devising Solutions Which Involve and Support Natural Systems



Base: All respondents who stated Urban Placemaking Skills as relevant to their role (488)

3.3.2.2.6 Devising Solutions Using a Range of Built Form and Interventions



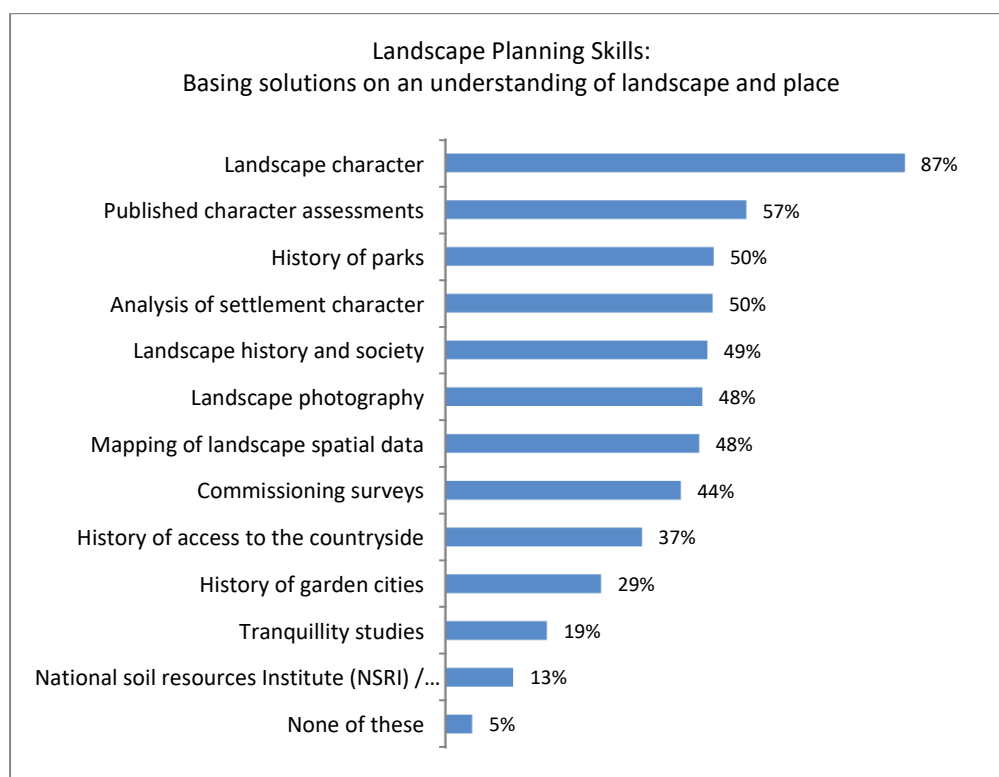
Base: All respondents who stated Urban Placemaking Skills as relevant to their role (488)

3.3.2.3 Landscape Planning Skills

Landscape Planning skills questions were only asked to respondents who stated that these skills were relevant to their role. 80% of all respondents indicated these skills were quite relevant or very relevant, and they were subsequently asked to indicate the relevance of specific skills within the following categories:

- Basing solutions on an understanding of landscape and place
- Considering environmental phenomena when devising solutions
- Negotiating solutions in the context of sometimes conflicting, sometimes opportunity-producing development, land uses and initiatives
- Delivering solutions within the political context and regulatory framework for the wider landscape
- Using a range of techniques for better Landscape Planning

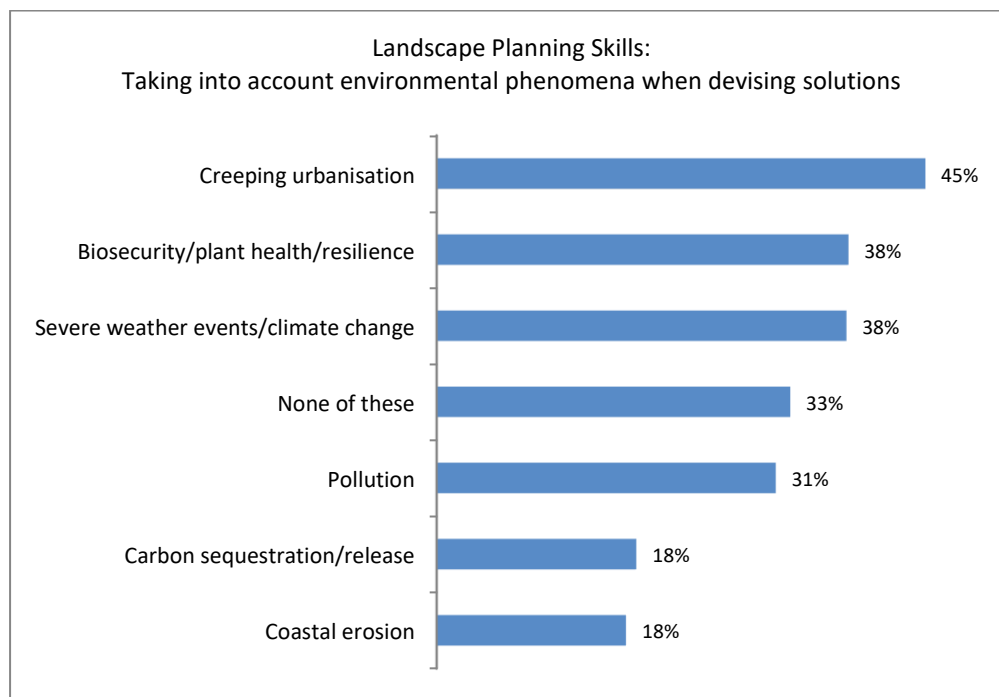
3.3.2.3.1 Basing Solutions on an Understanding of Space



Base: 509 respondents who stated Landscape Planning skills were relevant to their role

Landscape character was the most recognised skills related to basing solutions on an understanding of landscape and place.

3.3.2.3.2 *Considering Environmental Phenomena when Devising Solutions*



Base: 509 respondents who stated Landscape Planning skills were relevant to their role

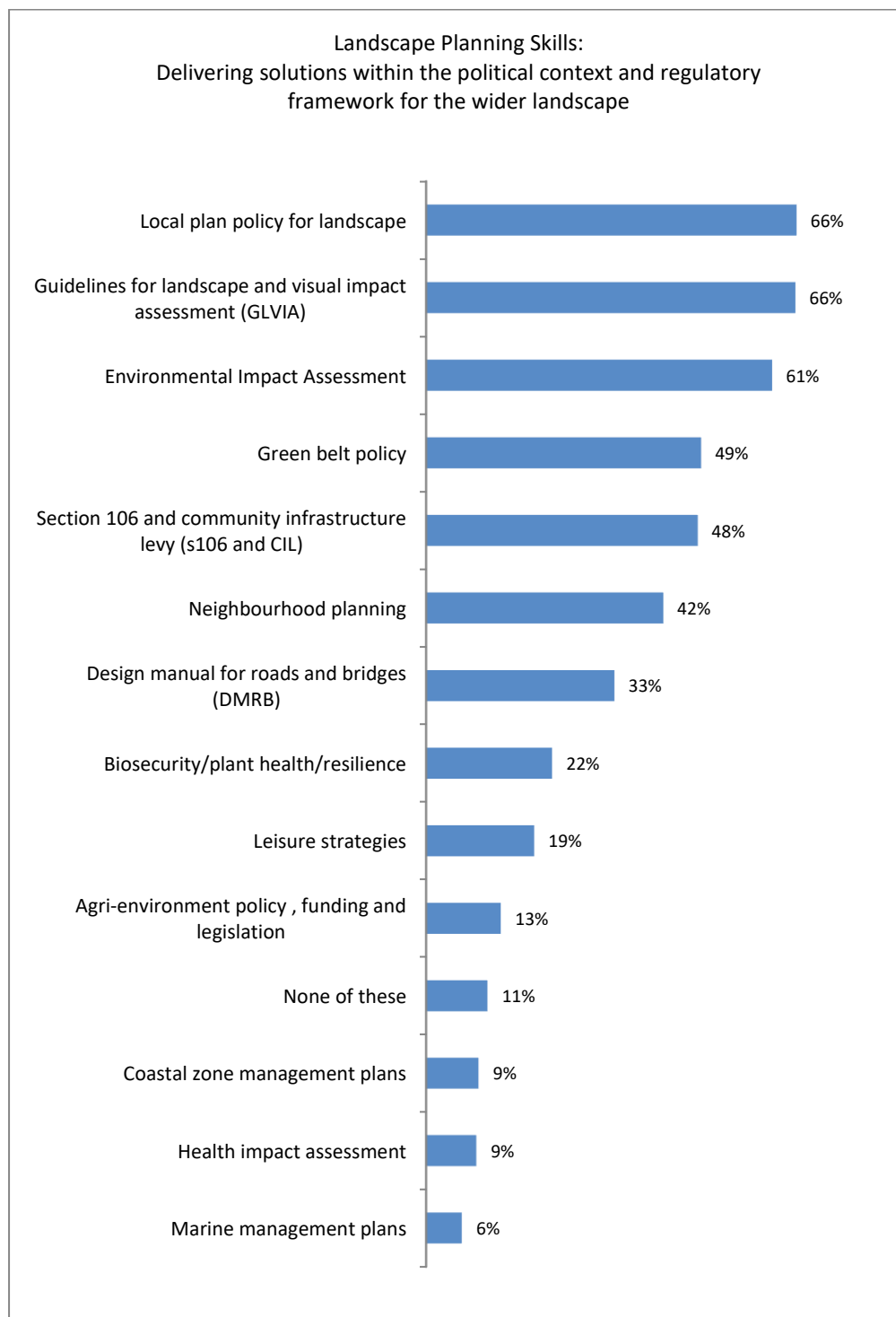
It should be noted that 33% of respondents indicated that none of the listed skills were relevant. This could suggest that such considerations are not relevant to their particular role.

3.3.2.3.3 *Negotiating Solutions in Context*



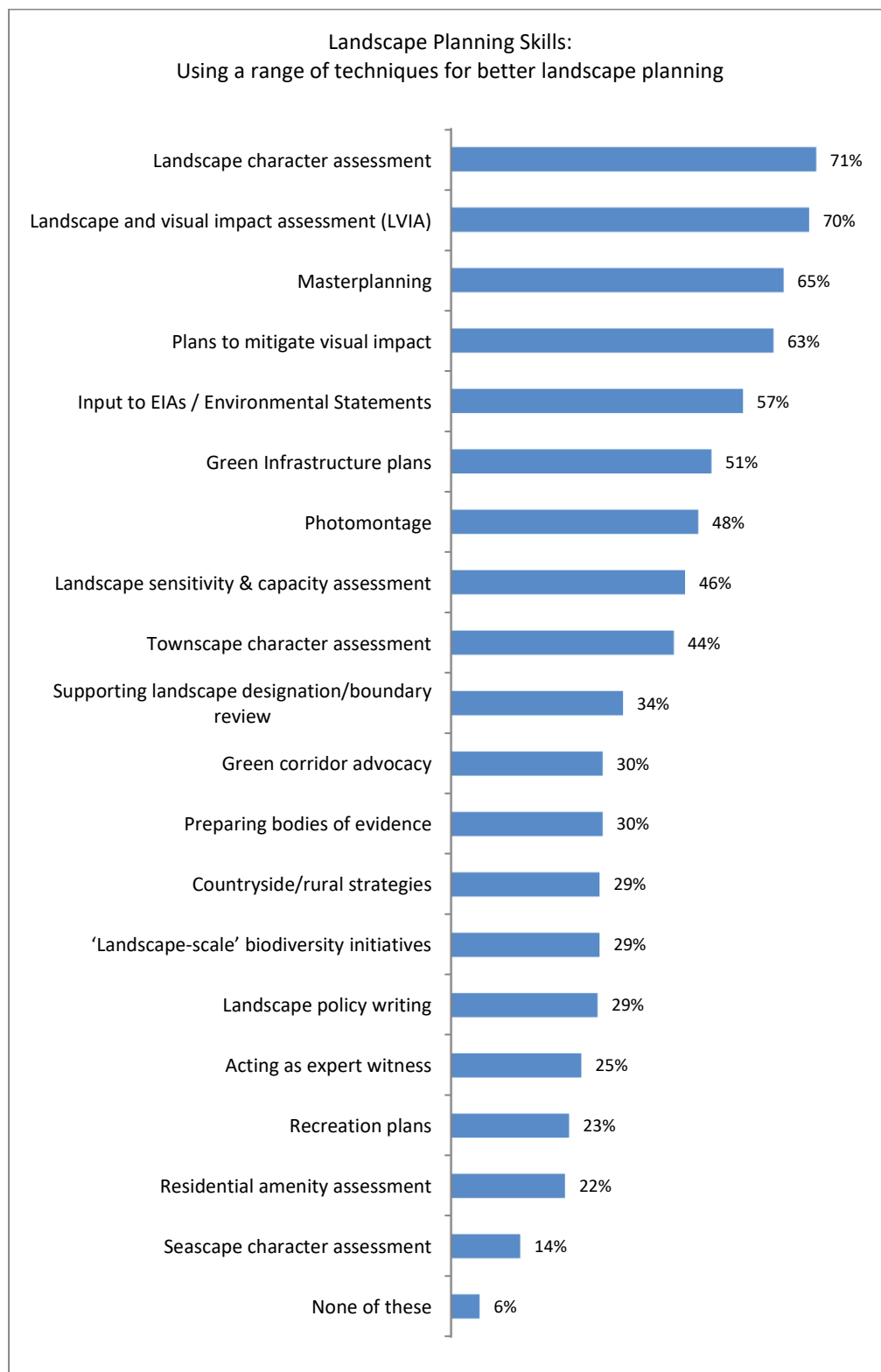
Base: 509 respondents who stated Landscape Planning skills were relevant to their role

3.3.2.3.4 Delivering Solutions within a Political Context and Regulatory Framework



Base: 506 respondents who stated Landscape Planning skills were relevant to their role

3.3.2.3.5 Using a Range of Techniques for Better Landscape Planning



Base: 503 respondents who stated Landscape Planning skills were relevant to their role

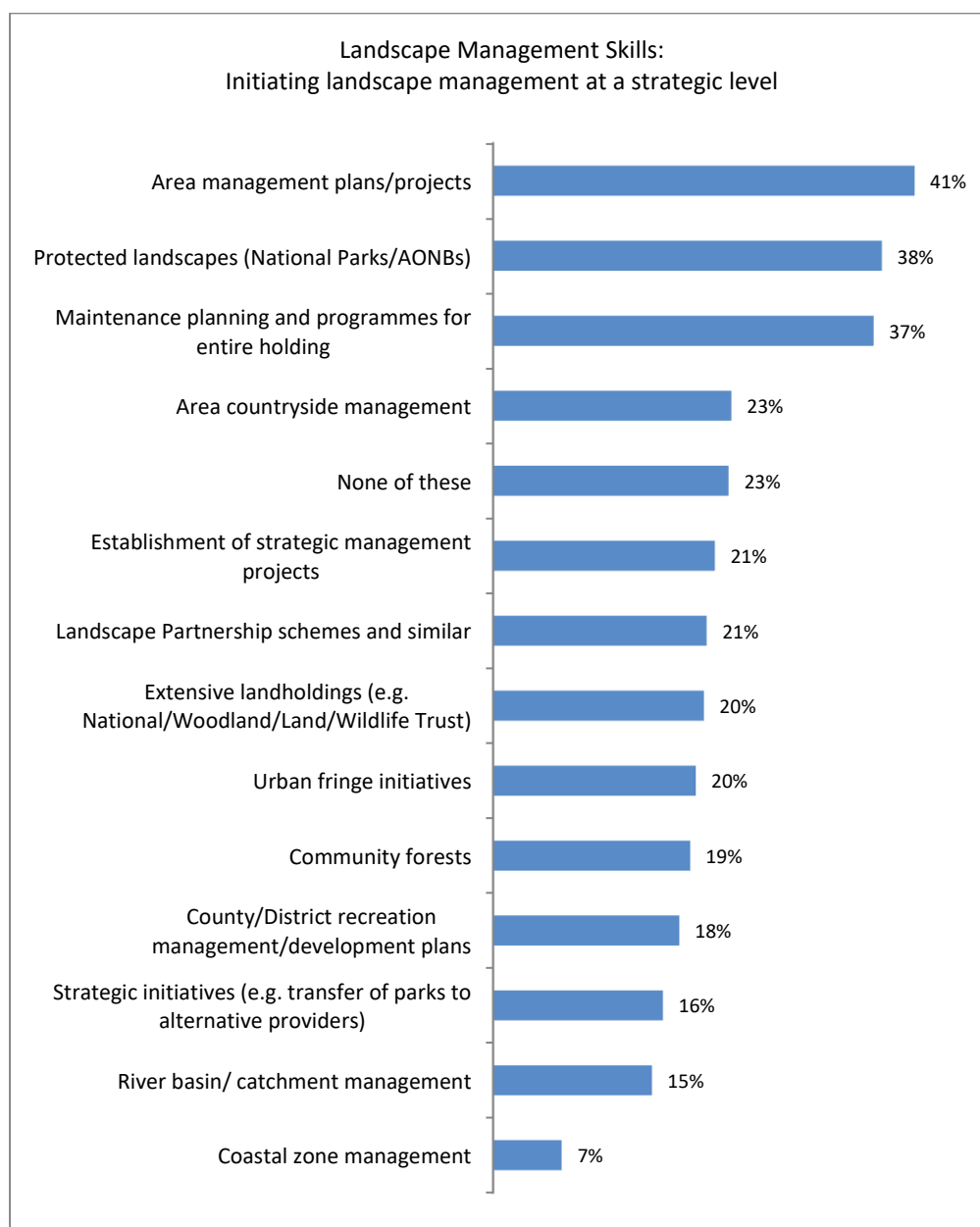
3.3.2.4 Landscape Management Skills

Landscape Management skills questions were only asked to respondents who stated that these skills were relevant to their role. 59% of all respondents saw these skills as either quite relevant or very relevant.

Landscape Management skills were broken down into the following categories:

- Initiating Landscape Management at a strategic level
- Overseeing on-site management of a range of local assets for multiple objectives
- Management for and with local users and visitors
- Creating a positive political and financial climate for management

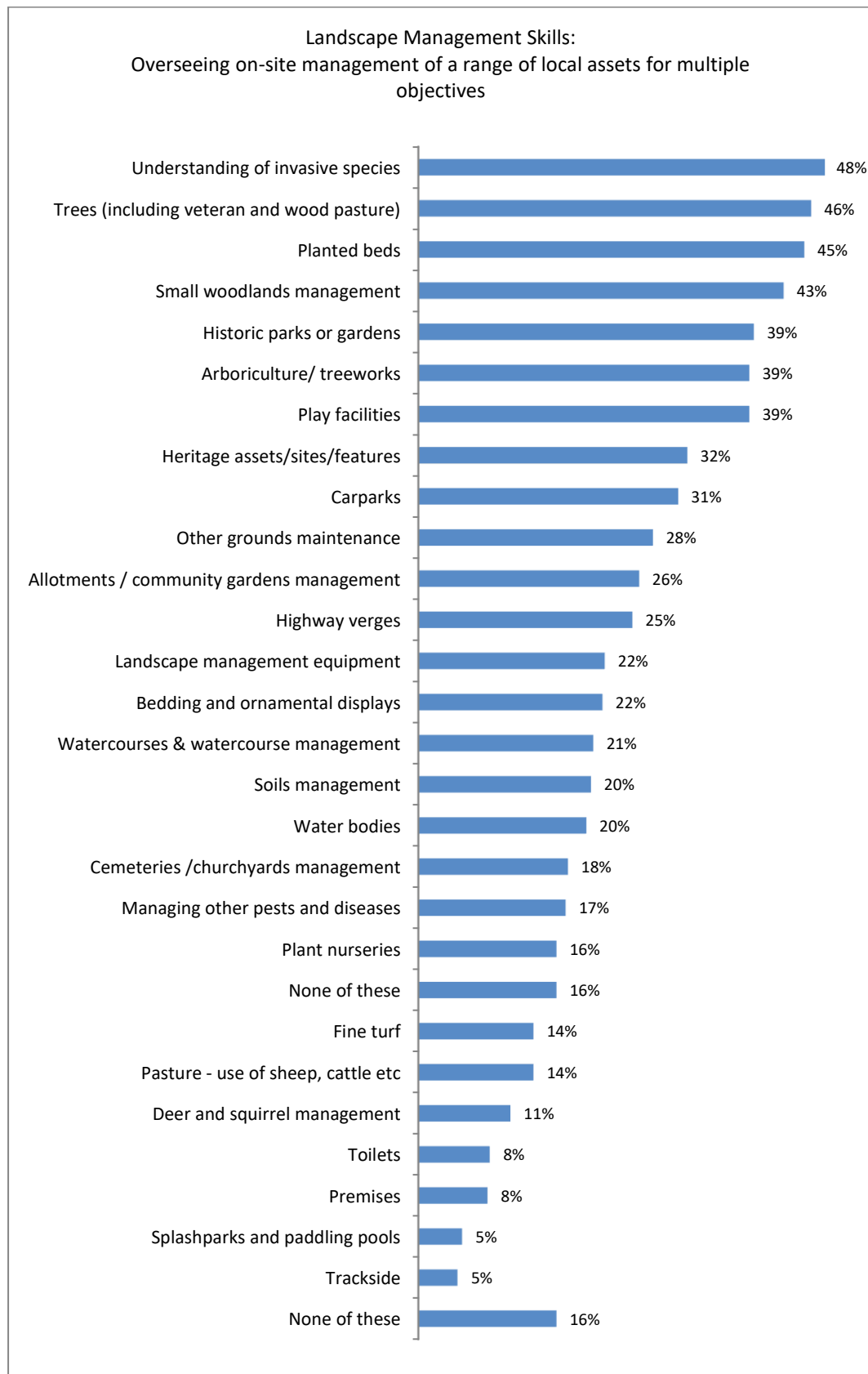
3.3.2.4.1 Initiating Landscape Management at a Strategic Level



Base: All respondents who stated Landscape Management Skills were relevant to their role (378)

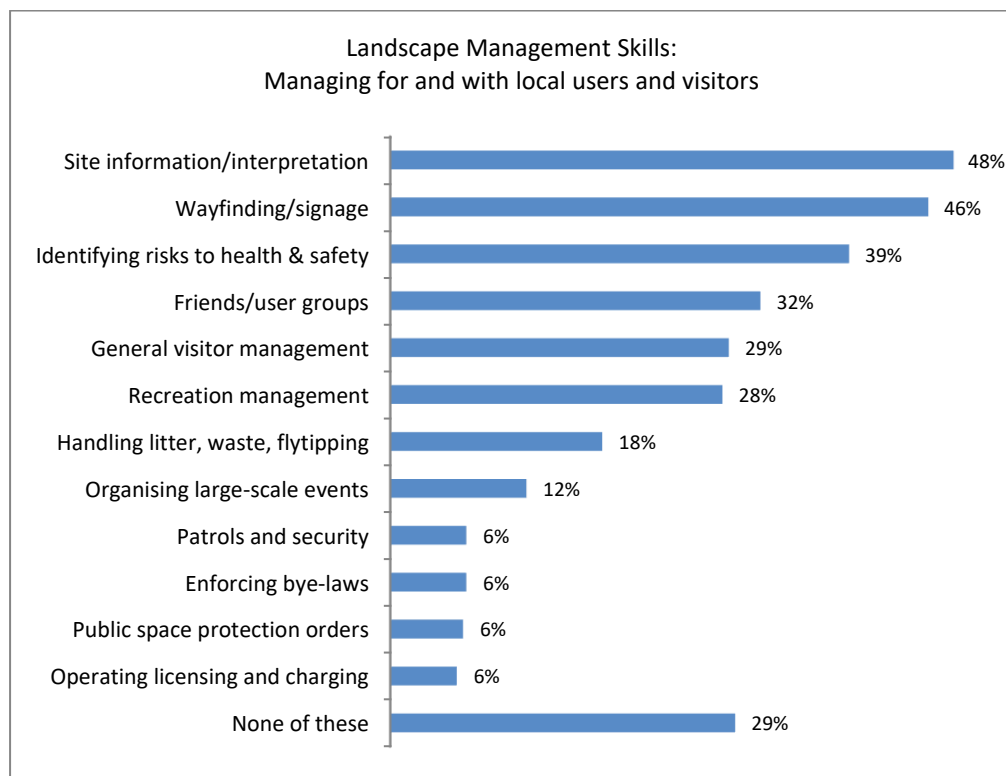
Nearly one quarter of respondents indicated that none of the listed skills were relevant to their role. This suggests that whilst management skills were relevant to their role, specific skills relating to initiating landscape management at a strategic level, were not relevant to them.

3.3.2.4.2 *Overseeing On-Site Management*



Base: All respondents who stated Landscape Management Skills were relevant to their role (370)

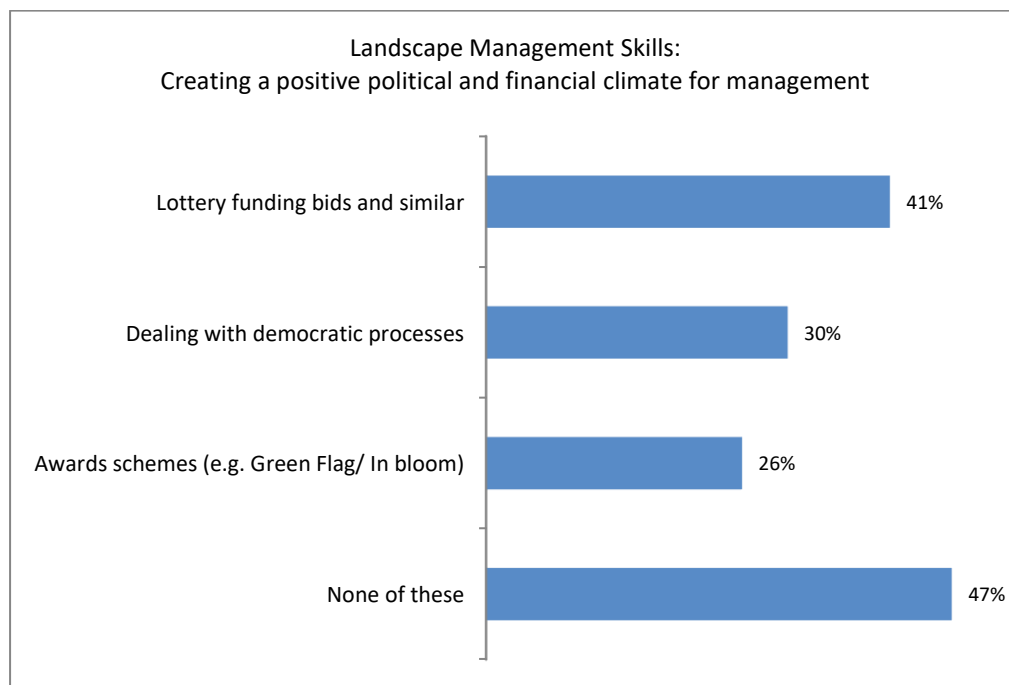
3.3.2.4.3 Management for and with Local Users and Visitors



Base: All respondents who stated Landscape Management Skills were relevant to their role (370)

29% of respondents indicated that none of the listed skills were relevant to their role, suggesting that this is perhaps an area of management that is not relevant to them.

3.3.2.4.4 Creating a Positive Political and Financial Climate for Management

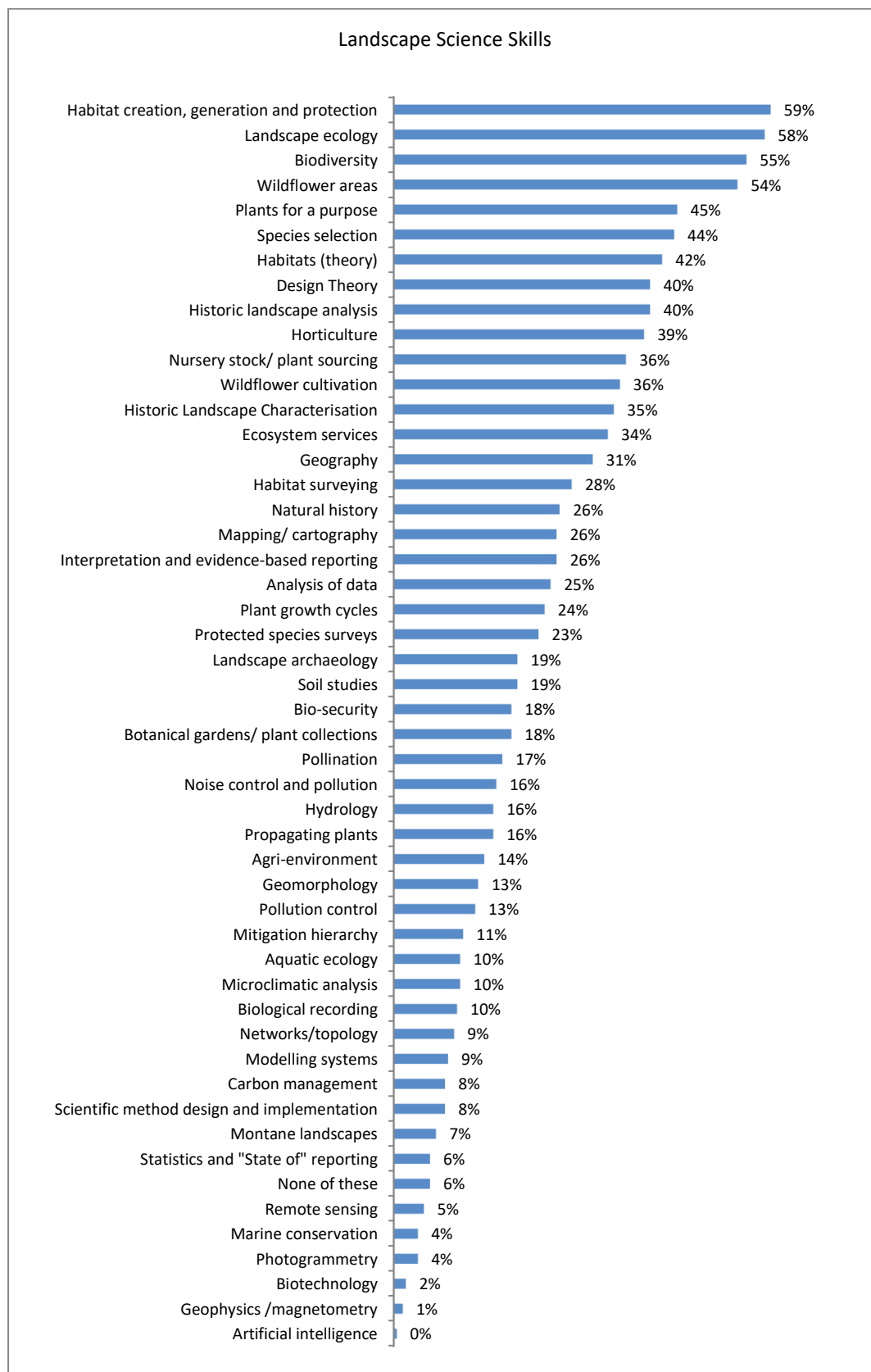


Base: All respondents who stated Landscape Management Skills were relevant to their role (370)

47% of respondents indicated that none of the listed skills were relevant to their role, suggesting that this is perhaps an area of management that is not relevant to them.

3.3.2.5 Landscape Science Skills

Landscape Science skills questions were only asked to respondents who stated that these skills were relevant to their role (33% of all respondents).

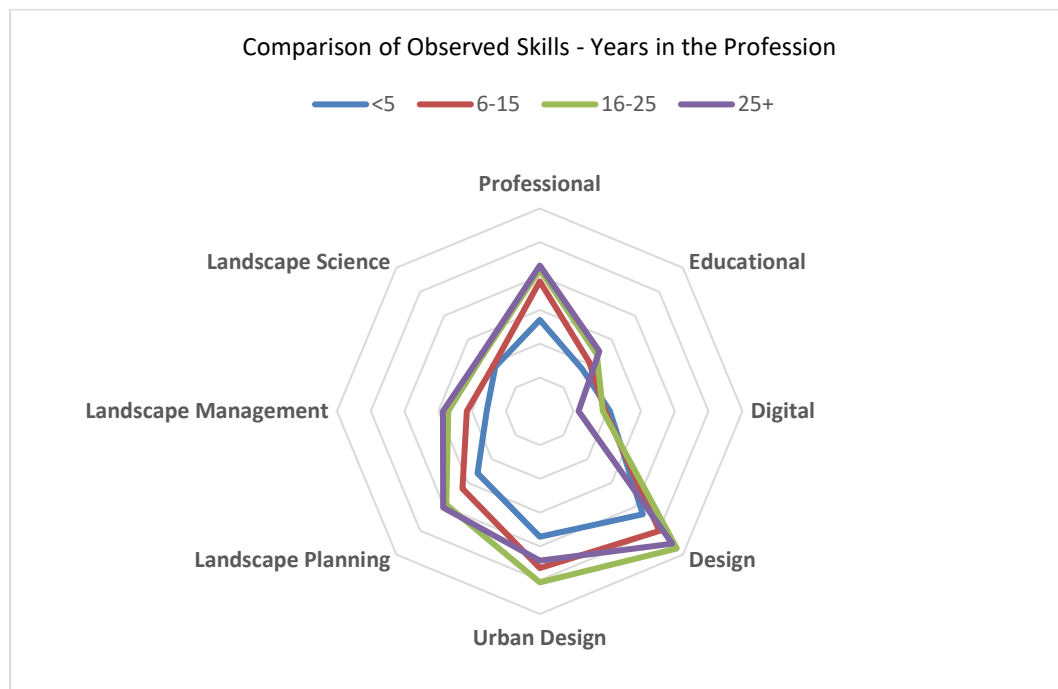


Base: All respondents who stated Landscape Science Skills were relevant to their role (211)

3.3.3 Skills Variances

Analysis was carried out to review skills and capabilities by different sub-groups. The charts below display skills stated as a % of total skills in each cluster. The further the line is to the outer edge of the web; the more skills are demonstrated.

3.3.3.1 Skills Variances by Experience



As might be expected when looking at skills and competencies from this perspective the, core skills of Design and Planning develop and strengthen as experience grows.

When it comes to professional skills more experienced members have particular expertise in “Community/stakeholder engagement/facilitation - 57% of respondents with >25 years’ experience compared to only 29% with less than 5.

Only 21% of people in the profession with <5 years’ experience would state contract management as a skill, compared to almost two thirds of people with more than 16 years in the profession.

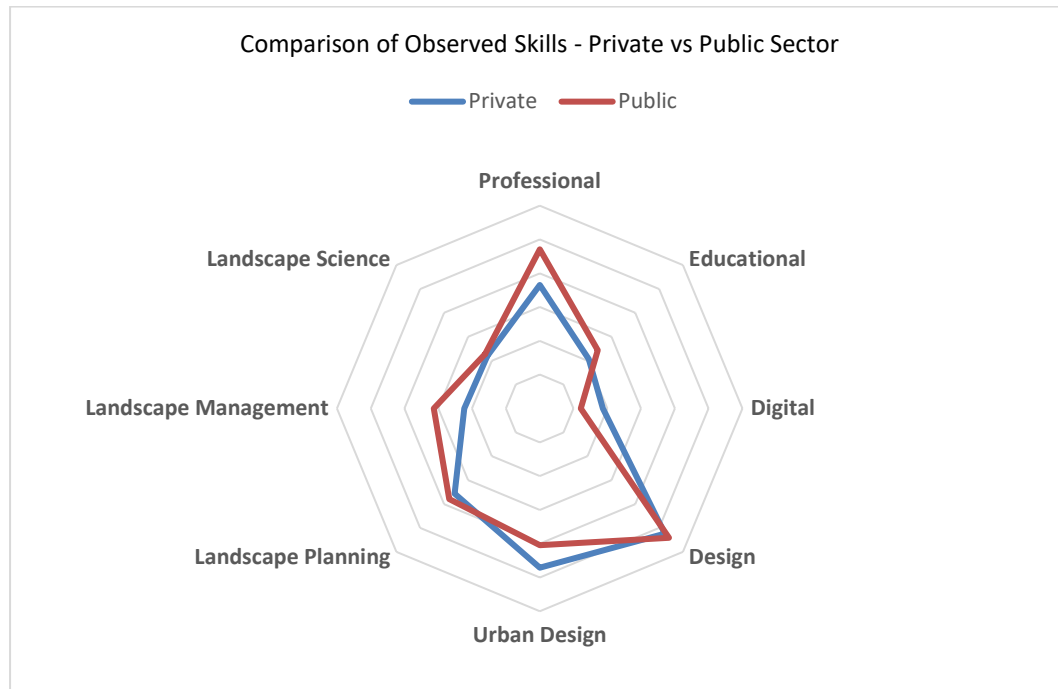
It is perhaps to be expected that younger professionals have greater digital skills than older more experienced professionals. Conversely, the results show that more experienced professionals are more likely to Commission Specialist Surveys with Digital Outputs.

Digital skills such as CAD, visualisation techniques, social media, and image editing are more likely to be relevant to people with less than 16 years’ experience in the sector.

With Design skills there is an interesting profile where the observed skills at 16-25 years, are very similar, and slightly greater than people with >25+ years in the industry. Is this because once you reach 15 or more years in a profession your opportunity to learn more is reduced because you simply know everything or perhaps that at that stage it is your ‘experience’ which is perceived to be more valuable than the ‘learned skills’?

Educational skills are particularly weak amongst less experienced members of the profession. For example, only 14% the sample with less than five years’ experience would be able to advise or promote future skills in the sector. This figure only rises to 27% for very experienced professionals with more than 25 years’ experience in the sector. Only around one third of professionals in the sector with more than 16 years’ experience would be able to deliver professional training as part of their role.

3.3.3.2 Skills Variances: Private vs Public Sector



The overall pattern of skills when comparing private professionals with public professionals remains quite similar, however public sector does demonstrate lower capability in digital skills and higher capabilities in Landscape Management.

It is interesting to comment on the different strengths across the public and private sector in relation to professional skills. In the private sector skills such as client / customer service, people management, problem solving, and project management are either slightly more apparent or are stated as a skill at least on a par with the public sector and clearly these strengths are equally important for both sectors to generate, manage and retain projects and employees / resources.

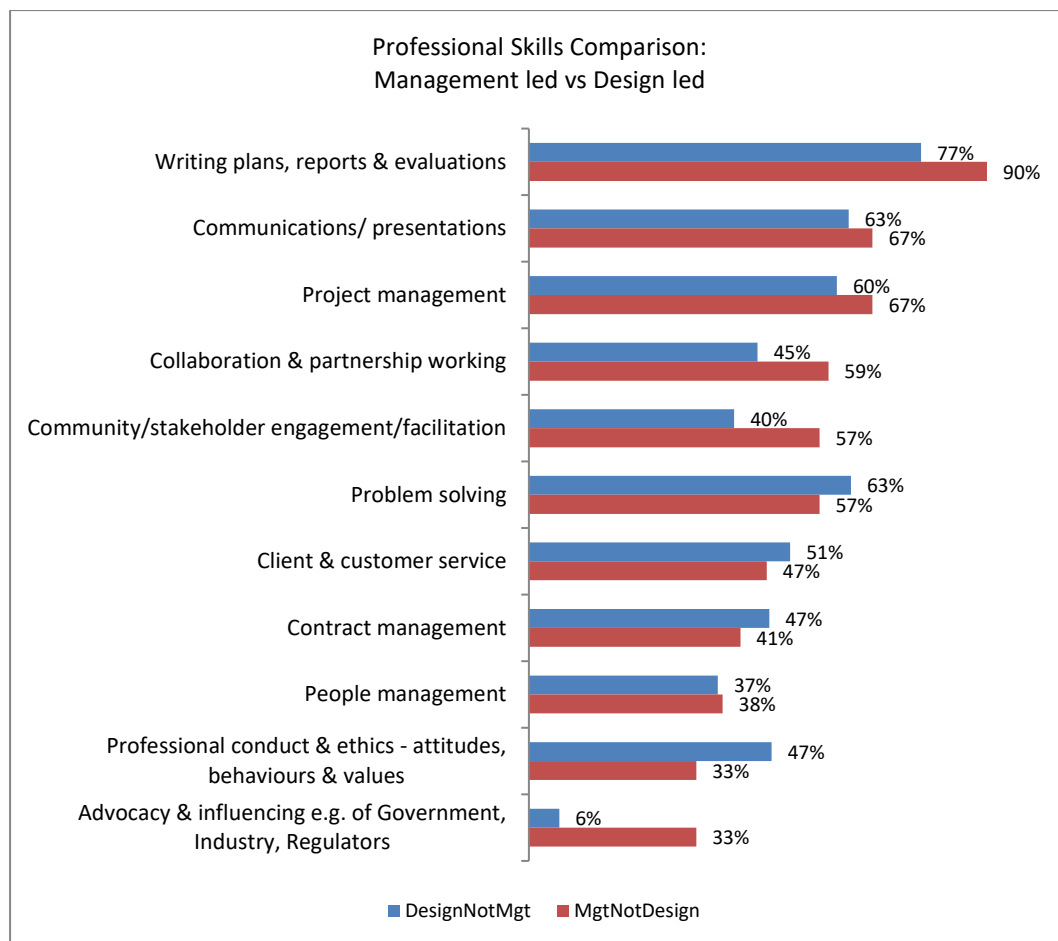
The public sector in comparison significantly outperforms the private sector in many professional skills areas such as:

- 'Collaboration & partnership working
- 'Community/stakeholder engagement/facilitation
- 'Equality, diversity and inclusion
- Health and safety, governance
- Information management and data protection
- Legal and regulatory
- Project management
- Writing plans
- Reports and evaluations

Perhaps this lack of focus on professional skills indicates a less formal approach to managing business in the private sector. It might also indicate a lack of resources to pay attention to regulatory issues. This could provide a potential benefit for membership of the LI, in supporting the private sector for these tasks in an effective way which avoids consuming resources better allocated to projects.

3.3.3.3 Skills Variances: Management versus Design-Led Respondents

3.3.3.3.1 Professional Skills



Base: 219 Design-led and 58 Management-led respondents

Overall, there is a good correlation between Design-led and Management-led professional competencies, except for Advocacy and Influencing skills that are only recognised by 6% of Design-led respondents, compared with 33% of Management-led respondents.

In addition, when compared to pure Design-led respondents, Management led professionals are significantly more likely to state expertise in professional skills such as:

- Community/stakeholder engagement/facilitation
- Governance skills
- Legal & regulatory skills
- Writing plans, reports & evaluations

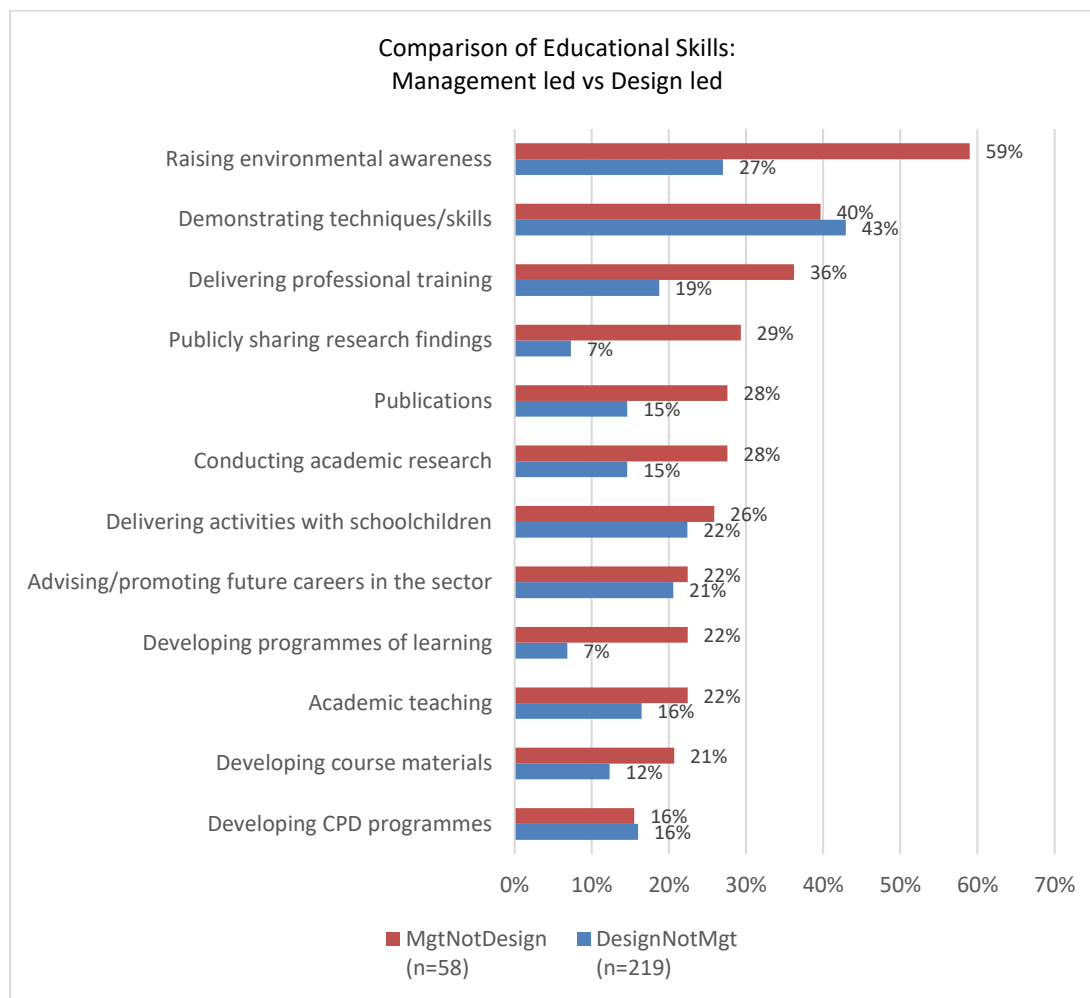
In contrast, the responses from Design-led respondents indicated they are more likely to demonstrate professional skills related to:

- Professional conduct & ethics - attitudes, behaviours & values

This could potentially be a result of such 'softer skills' becoming more recognisable as important in more recent years. This provides an opportunity for LI in offering education and raising awareness of how these skills can benefit business.

From the top skills identified by Management led respondents, they are very comfortable with communicating and evaluating information either in written form or through presentations. Community and stakeholder engagement is also a key skill.

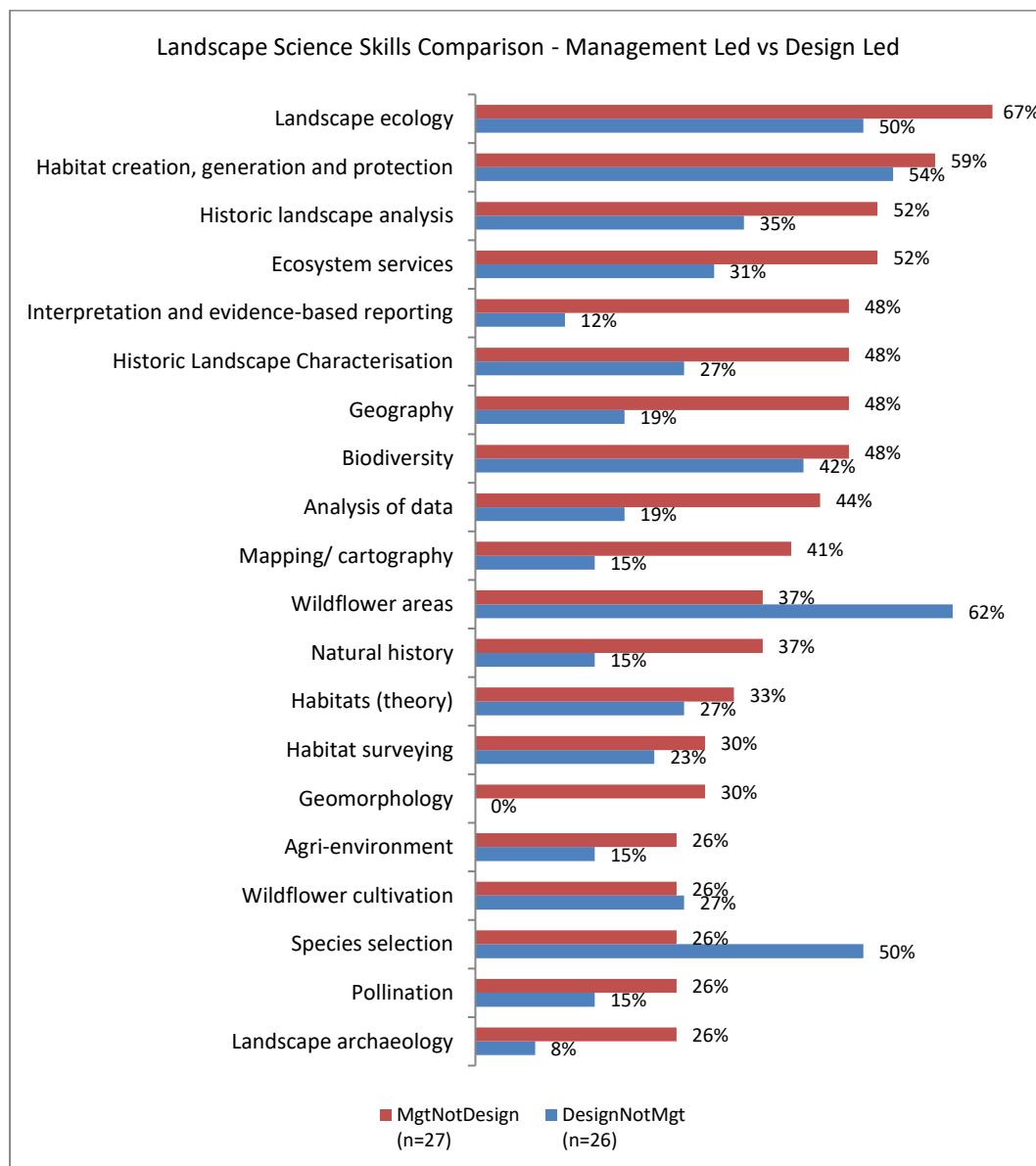
3.3.3.2 Educational Skills



Base: 219 Design-led and 58 Management-led respondents

Across the entire research sample educational skills have been shown to be weak in contrast to other areas. However, management led respondents are stronger than the design-led sub-group for skills such as raising environmental awareness, developing programmes of learning, delivering professional training, conducting and publicising academic research which were all significantly stronger than for Design-led respondents.

3.3.3.3 Landscape Science Skills



Base: 219 Design-led and 58 Management-led respondents

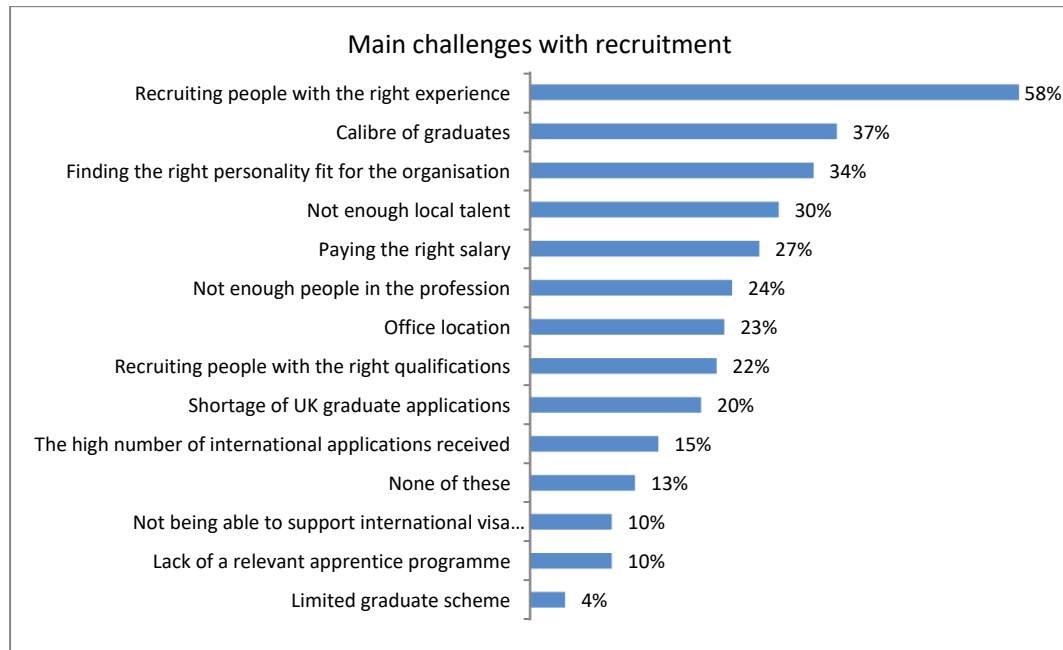
When comparing Management-led vs Design led respondents, there is a very strong correlation between Landscape Science and Landscape Management skills.

Almost 50% of the sample who stated a Landscape Management focus also stated that Landscape Science skills were relevant to their role.

However, in the chart above, it must be noted that the Science skills presented do differ between these sub-groups. Skills such as geography, geomorphology, mapping and cartography, statistics and “state of” reporting, interpretation and evidenced based reporting were all significantly more likely to appear for management led, than Design-led respondents.

3.3.4 Satisfaction with Current Graduate Skills

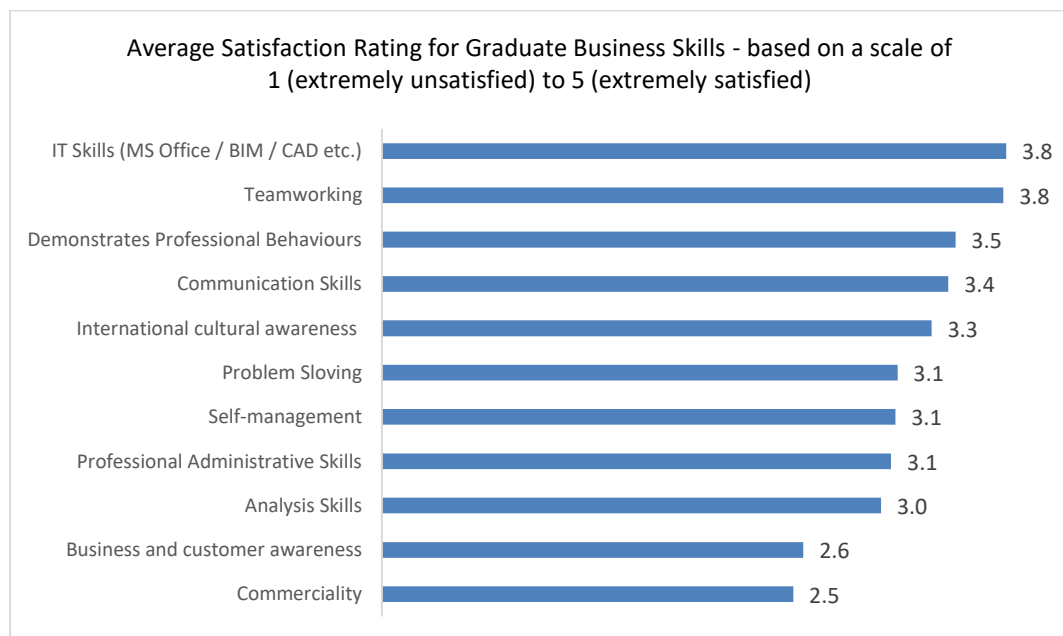
The second highest challenge for organisations when it comes to recruitment is related to the quality of available graduates, with over one third of practice heads finding this an issue.



Base: Practice Heads (216)

Practitioners in management roles were also asked to assess the performance of recent graduates into their organisation in relation to business and landscape specific skills. They were asked to rate satisfaction on a scale of 1-5 with 5 being extremely satisfied. The following charts present the mean score.

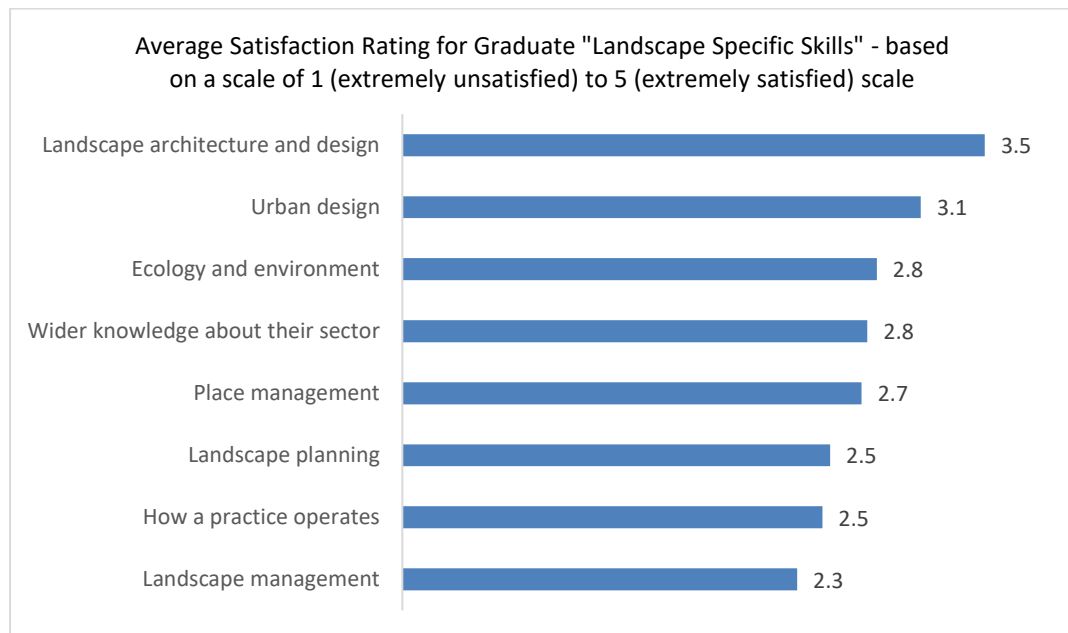
3.3.4.1 Business Related Skills



Base: Practice Heads (210)

Recent graduate IT skills and teamworking abilities were the highest rated skills, with their general commercial business awareness scoring the lowest. When reviewing these skills against different business subgroups, there was no real significant differences aside from analysis skills, where graduates scored higher in larger companies.

3.3.4.2 Graduate “Landscape Specific” Skills



Base: Practice Heads (210)

Satisfaction with the “Landscape Specific” skills of graduates is lower than that of their business skills. Graduates fared better however when it came to skills related to Landscape Architecture and Urban Design. The core disciplines of Landscape Planning and Management were rated less favourably. (Landscape Management skills scored higher in larger companies).

A recognition of the lack of commercial awareness amongst graduates is again reflected with the low score for “Understanding of how a practice operates”. However, graduates at larger companies also scored higher in this area.

3.3.4.3 General Themes on Graduates

3.3.4.3.1 Expectations

This word was used many times in relation to what a graduate might want from their job. They are believed to have too high an expectation of what they might achieve in the profession, and the time taken to achieve it.

“The graduates I have employed have behaved as though 'they are doing me a favour' instead of the other way around”

“...there is a shift in the attitude with their focus directed at more "selfish" development with very little will to contribute to the team and the practice - big sense of entitlement - very low loyalty, they change jobs frequently...”

3.3.4.3.2 Planting and Materials Knowledge

A common theme throughout the research and is specifically highlighted as an area lacking amongst graduates. A lack of planting knowledge is a big frustration for practice heads. Examples of this included the following comments:

“Many have very limited knowledge of plant ecology, planting communities and contemporary planting.”

“General poor knowledge of plant materials and construction”

3.3.4.3.3 IT and Digital Skills

IT and digital skills are generally recognised as being a graduate’s strong point. However, there were comments regarding the depth of this knowledge. Is it that this is superficial? Other more in-depth knowledge might be lacking (e.g. CAD, 3D).

“Very basic IT skills (good at Adobe Suite - poor at CAD)”

3.3.4.3.4 Design

Detailed knowledge relating specifically to Landscape Design is often seen to be lacking. Also, the ability to hand draw and sketch is often mentioned.

“Reliance on use of software to design rather than use of hand drawn design exploration and how concept design is an important first stage where project life considerations and technical / science input can be overlooked”

“Design & drawing skills of graduates who did NOT study landscape at undergraduate level is noticeably poorer than those that did.”

3.3.4.3.5 Commerciality

A strong feature of the feedback on graduates was their lack of commercial knowledge, or appreciation of how a practice is run, or the interrelationships across the construction value chain. Examples of this included the following comments:

“Most [graduates] love to produce glossy images but don't understand construction, legislation - the “boring stuff””

“Deadline driven nature and pace is not always conveyed through university”

“[Graduates] usually have to learn how the politics work in local government”

“I think there is quite a disconnect between the education world and real-life practice. For me there's been this move towards concentrating on design and development of visualisations and things like that. I think there is not enough emphasis made on practicalities, buildability”.

3.3.4.3.6 Breadth of Knowledge

While it is unfair to expect recent graduates into the industry to have a full understanding of the profession, there is a sense that they should at least have a basic grasp of the interrelationships between disciplines and the issues that inform the landscape professional

“They do not seem to have developed, or been properly introduced to the wide variety of skills the industry requires”

“Very limited/no understanding of the holistic range of skills required and how they interrelate”

“Lacking a broad enough knowledge of wide ranging issues that inform landscape practice”

There is an opportunity for LI to influence graduate development / training schemes or to link with universities / colleges to 'approve' courses which satisfy the requirements of their members for future graduate employees.

3.3.5 Emerging Skills Requirements

Respondents in the survey were asked to identify key skills for themselves, or in the case of practice heads, skills that the practice needed to acquire in the next five years.

3.3.5.1 Digital Skills

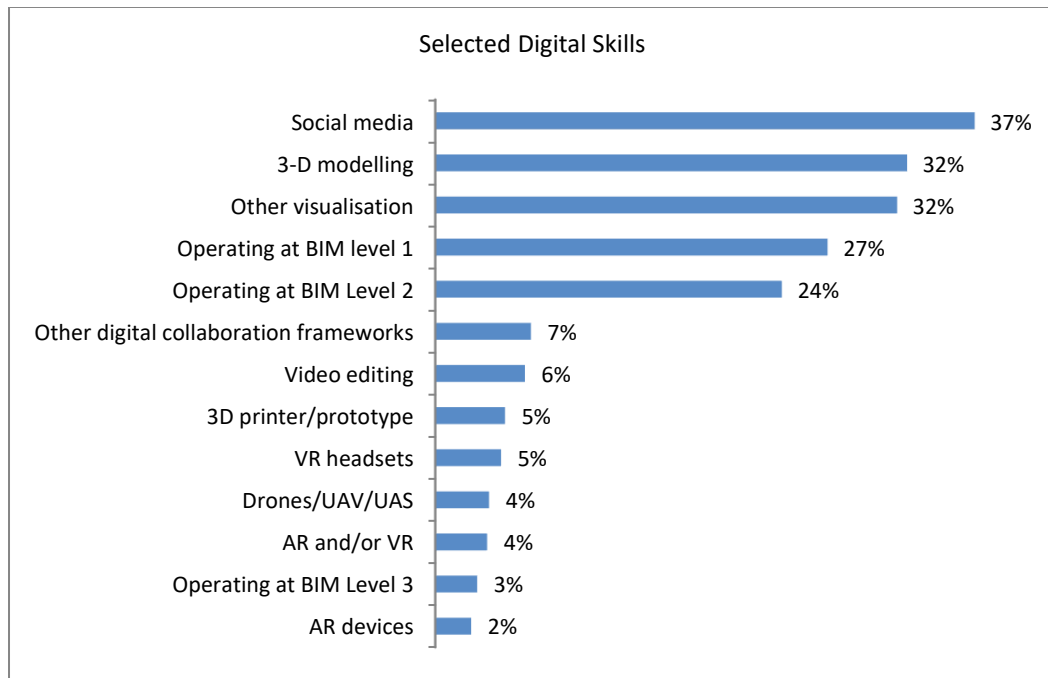
From both personal development and in terms of organisational readiness, digital and technology skills with Building Information Modelling (BIM) and visualisation techniques being most important. The role of BIM in the Design process and how Landscape Design will be integrated into the different levels of BIM maturity was a particularly strong message.

Some quotes are included from the research for illustration:

“Although it [BIM] is not widely adopted at the moment, you can see that within maybe five years or so, that’s what everyone will be doing so I would suggest focussing on BIM compliant software”

“Somebody said to me, CAD is history, the day that the Revit and BIM was born”

“Visualisation will need to keep up with advances in VR technology. Likely Architects will already be looking closely at this, Landscape Architects will need to be aware of this too”



Base: All respondents

Only 27% of the profession have expertise in using BIM at level one.

According to the 2016 BIM survey from National Building Specification (see <https://www.thenbs.com/knowledge/national-bim-report-2016>) which, while having a sample that is very much represented by architects, states that 54% of respondents are using BIM in their practice.

3.3.5.2 Marketing

There are broadly two aspects to this. One is the ability to market the profession and linked to this is the ability to demonstrate value. It’s not just about quantification it is about conveying how valuable the profession is and the key role it plays in solving the world’s problems.

The second aspect of marketing is linked to marketing the practice. There is a recognition that practices need to do a better job of marketing their offer.

The importance of harnessing social media for awareness and engagement with potential clients is also recognised.

3.3.5.3 Landscape Strategy

There are three areas of importance here:

3.3.5.3.1 Planning regulations and legislation

There is a recognition of the need to keep on top of changes to planning regulations and legislation likely to impact the profession.

“Better understanding of planning laws, legal interpretations in relation to large infrastructure projects. Better skills to encouraging better design solutions for large infrastructure projects” – Principal Small Private LA Practice

3.3.5.3.2 Understanding local government

“We need to understand the public sector and private sector. If you factor in public sector reform as a lot of our work sits within the public sector. So, we need business planning skills as the public-sector changes continually” CEO Landscape management body

3.3.5.3.3 Understanding the construction industry

“I guess the construction industry are always up against it in terms of delivery, and I think there is still a slight lack of understanding between different disciplines of what each other does” - Principal, mid-sized practice

3.3.5.3.4 Communication

The need for more effective communication skills was a recurring theme during the research. This related to communicating at different levels, communicating and collaborating within teams and influencing through they value chain. Effective communication helps with being able to demonstrate credibility and fight the landscape architects’ corner.

“Communication is really a skill and it is key to everything we do. You don’t win work unless you can communicate with people that will give it. You don’t retain work. You don’t get work approved. All of those things fall flat if you can’t communicate”

“Better narrative to justify our profession and demonstrate its value in the pantheon of professions”

“The biggest thing for us is the ability to communicate. When I went through University and started work, the push for us to focus on was the ability to communicate with other professionals, your clients, the other people in your office. And that seems to be something which is now really lacking”

“Communications is very important, to tell a story and create narrative”

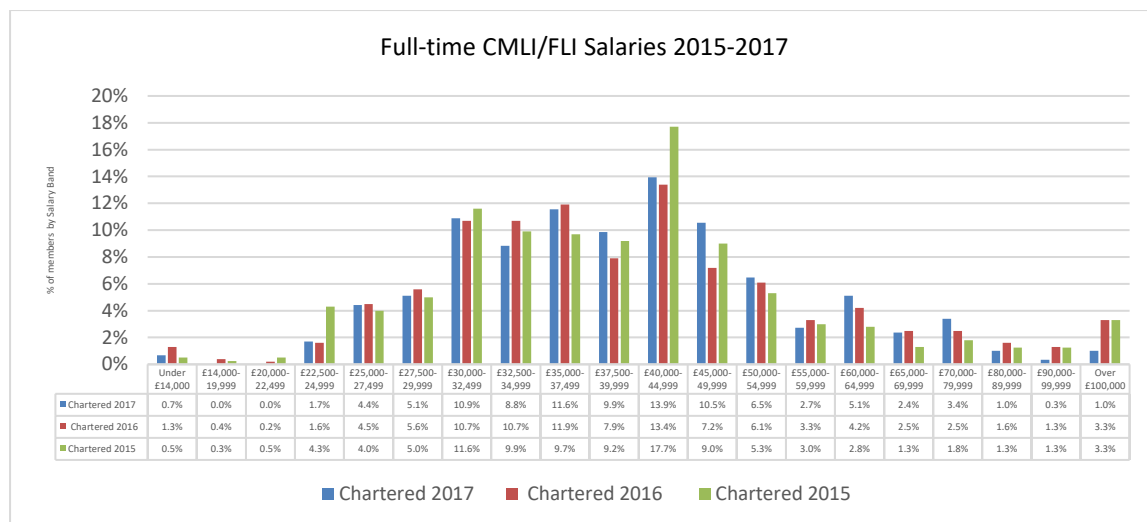
However, one third of landscape professionals do not see themselves as having communications and presentations as a professional skill. Just under half do not class “collaboration and partnership working” as a skill.

3.4 Salaries Analysis

The following analysis comes from the 2017 State of Landscape Survey. Additional questions on salary were added to the survey and we have compared these results with results of previous years' salary surveys where possible. We have used as a basis for comparison the 2016 Employment and Income Survey Results. These results should be viewed in the context of the 2017 State of Landscape Research for information regarding methodology and sample.

3.4.1 Current Salaries for Landscape Professionals

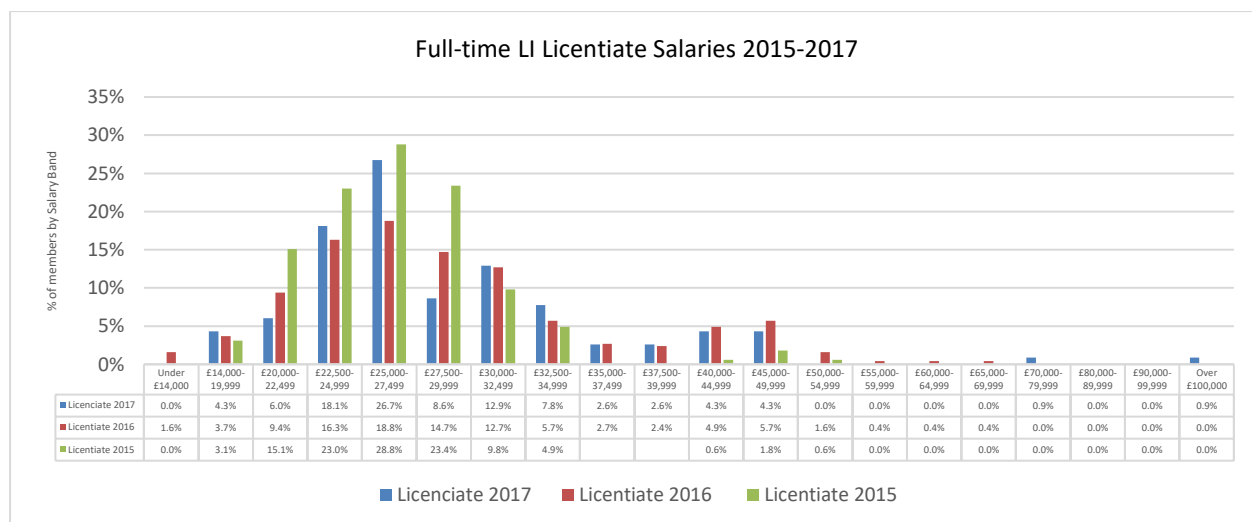
3.4.1.1 Full-time CMLI/FLI Salaries 2015 -2017



The proportion of CMLI/FLI members earning more than £50,000 has decreased to 22.4% of members compared with 24.8% in 2016.

In 2017 65.6% of full-time CMLI/FLI members were earning between £30,000 and £50,000. In 2016 this figure was 61.8%.

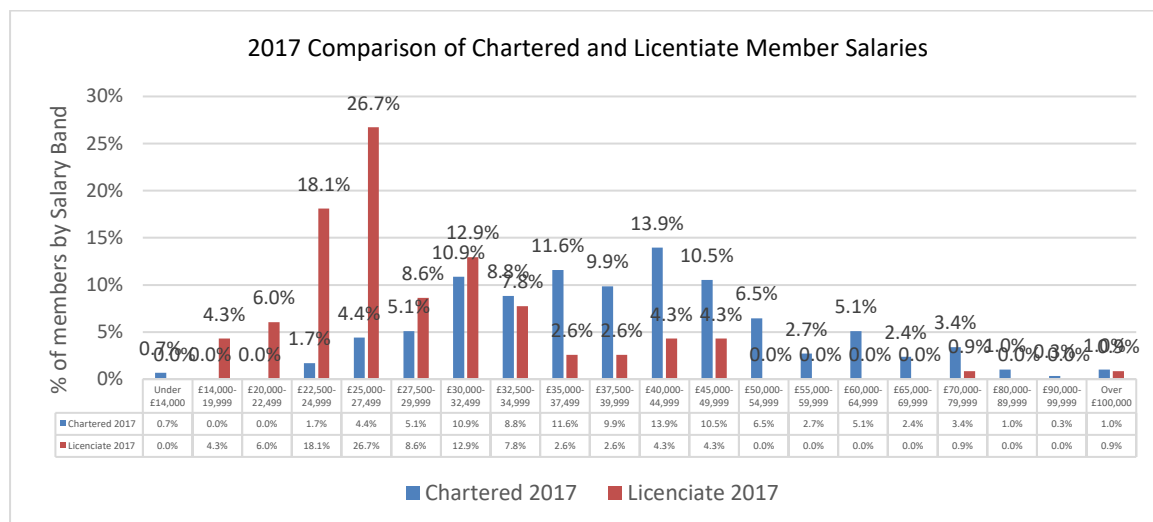
3.4.1.2 Full-time Licentiate Salaries 2015-2017



85% of licentiate members earned less than £35,000 in 2017. This compares to 83% in 2016.

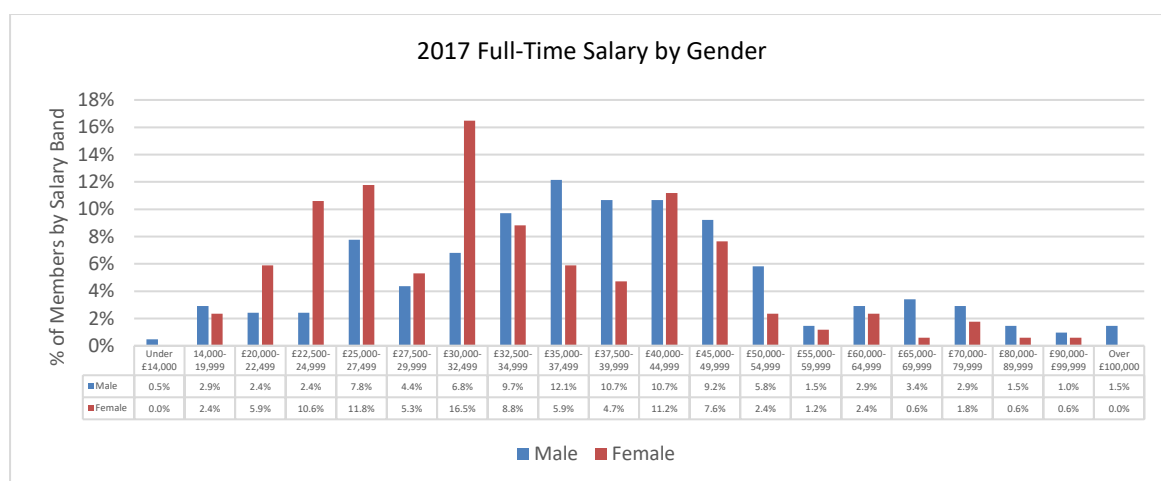
44.8% of licentiate members earning between £22,500 and £27,499 in 2017 compared with 35% in 2016.

3.4.1.3 2017 Comparison of Licentiate and CMLI/FLI member salaries



The real impact of Chartership on Salaries is evident from salaries of £35,000. In the £35,000 to £50,000 range 45.9% of chartered members fall into this category compared to only 13.8% of Licentiate members.

3.4.1.4 Full time 2017 Salaries by Gender

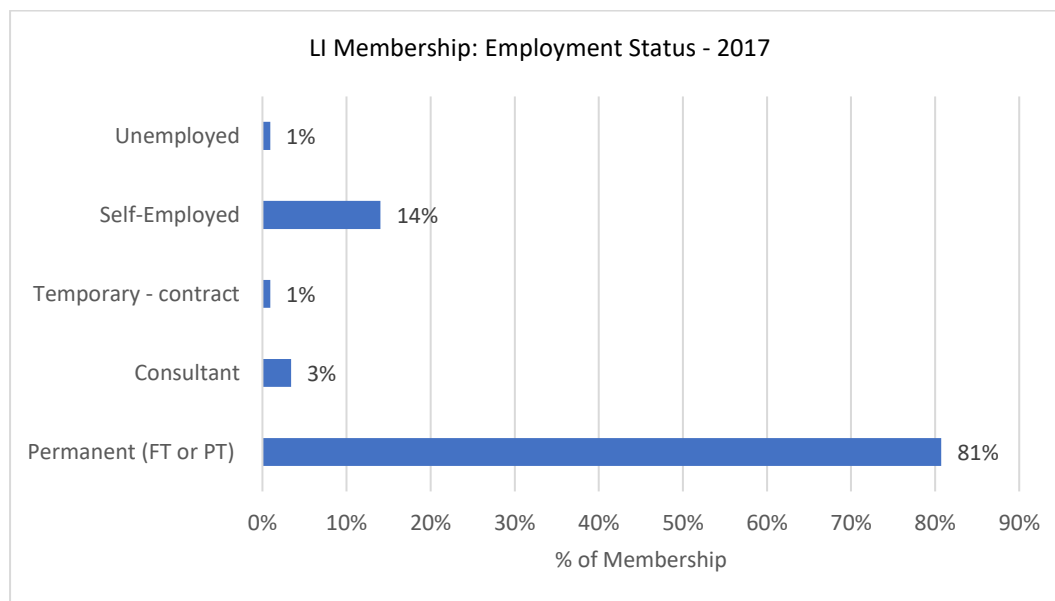


Base 2017: 206 male respondents, 170 female respondents

More than twice as many men than women fall into the over £50,000 salary category in 2017 with 20.4% of men compared with 9.4% of women. This was a similar story on 2016.

However, in the £30,000 to £50,000 bracket the figures for both genders are more comparable. 59% of men and 54.7% of women surveyed fell into this category.

3.4.1.5 Employment Status



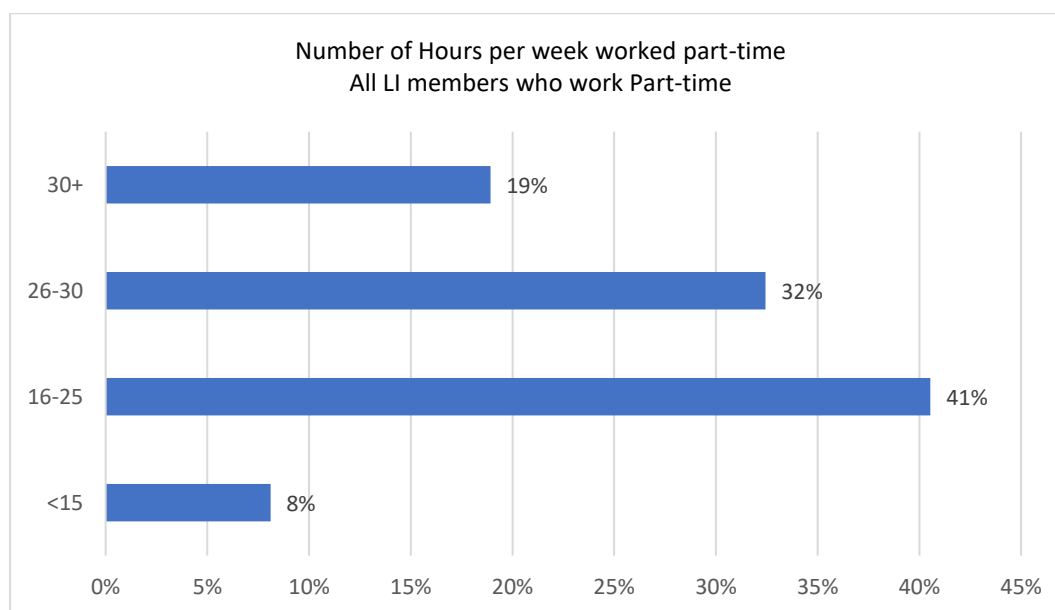
Base: 648 LI members

81% of LI members in 2017 have permanent roles (either full or part time). This compares to 90% in 2016 and demonstrates a drop back to 2014 figures.

There is an increase in 2017 of self-employed members compared to 2016. (14% compared to less than 10% in 2016)

11% of member respondents from the State of Landscape Survey stated they worked part-time.

3.4.1.6 Part-Time Hours



Base: All LI Members who work part-time (74)

Of the members who work part-time 73% work between 16 and 30 hours per week.

3.4.2 Analysis Data 2015-2017

	Chartered (CMLI/FLI) 2017	Chartered (CMLI/FLI) 2016	Chartered (CMLI/FLI) 2015	Licentiate 2017	Licentiate 2016	Licentiate 2015
Under £14,000	0.7%	1.3%	0.5%	0.0%	1.6%	0.0%
£14,000-19,999	0.0%	0.4%	0.3%	4.3%	3.7%	3.1%
£20,000-22,499	0.0%	0.2%	0.5%	6.0%	9.4%	15.1%
£22,500-24,999	1.7%	1.6%	4.3%	18.1%	16.3%	23.0%
£25,000-27,499	4.4%	4.5%	4.0%	26.7%	18.8%	28.8%
£27,500-29,999	5.1%	5.6%	5.0%	8.6%	14.7%	23.4%
£30,000-32,499	10.9%	10.7%	11.6%	12.9%	12.7%	9.8%
£32,500-34,999	8.8%	10.7%	9.9%	7.8%	5.7%	4.9%
£35,000-37,499	11.6%	11.9%	9.7%	2.6%	2.7%	
£37,500-39,999	9.9%	7.9%	9.2%	2.6%	2.4%	
£40,000-44,999	13.9%	13.4%	17.7%	4.3%	4.9%	0.6%
£45,000-49,999	10.5%	7.2%	9.0%	4.3%	5.7%	1.8%
£50,000-54,999	6.5%	6.1%	5.3%	0.0%	1.6%	0.6%
£55,000-59,999	2.7%	3.3%	3.0%	0.0%	0.4%	0.0%
£60,000-64,999	5.1%	4.2%	2.8%	0.0%	0.4%	0.0%
£65,000-69,999	2.4%	2.5%	1.3%	0.0%	0.4%	0.0%
£70,000-79,999	3.4%	2.5%	1.8%	0.9%	0.0%	0.0%
£80,000-89,999	1.0%	1.6%	1.3%	0.0%	0.0%	0.0%
£90,000-99,999	0.3%	1.3%	1.3%	0.0%	0.0%	0.0%
Over £100,000	1.0%	3.3%	3.3%	0.9%	0.0%	0.0%

Note: 2017 Respondents: CMLI/FLI: 294, Licentiate: 116

3.5 The Value of the Sector

Members of the Landscape Institute recognise the importance of raising the profile of the industry and showcasing projects that have delivered value and benefits in terms of other perhaps less quantifiable measures such as health and wellbeing. This is seen by the members as a very important and powerful message to present. The LI's role is also seen as vitally important in educating a wider audience, especially across the adjacent disciplines, to the reasons for investing and spending money in landscape projects.

"You can measure it [value] in different ways. I don't think you can get away from recognising financial value but there is an ever-growing recognition of things like social value, environmental value. I think social value is really coming more to the fore"

Principal, medium sized landscape practice

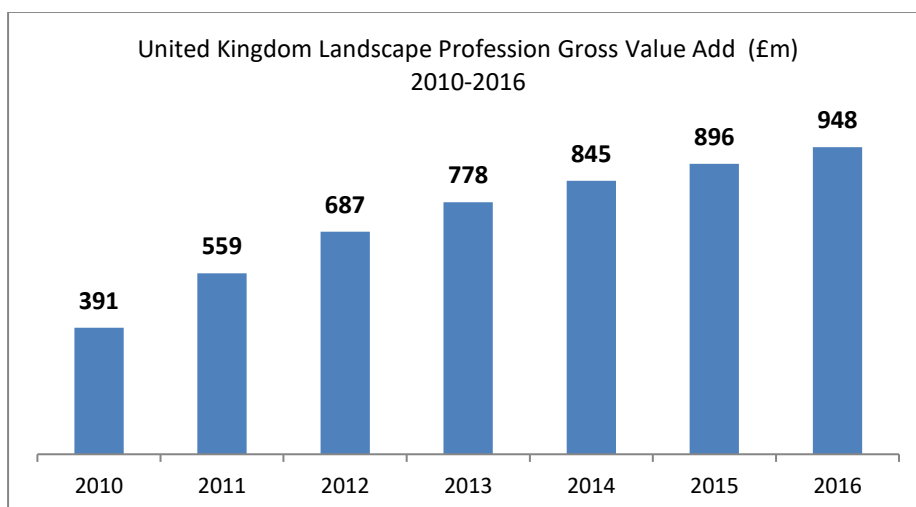
Quantifying value however recognised by members as another important role the LI should play to help with promoting the profession.

3.5.1 How We Measure Value

To quantify the value of the profession this report will use the standard economic measure of approximate Gross Value Add (aGVA). This is a measure produced by the Annual Business Survey (ABS) and is made up of income such as total turnover, business rates, subsidies, stock values and expenditure such as purchase of good materials and services. Gross value added (GVA) measures the contribution to an economy of an individual producer, industry, sector or region. It is used in the calculation of gross domestic product (GDP). These estimates for market contribution to the UK economy are calculated using the standard industry classification of 71112 (2007) which is described as Urban Design and Landscape Architectural Activities. This is a subset of architectural activities. For the purposes of this analysis we have assumed this represents the private practice and consultancy proportion of the industry and includes any government advisory and non-profit organisation. It doesn't however include landscape activities at local authorities. We have taken the 15% of the sample from the survey that represents local authorities and added this into to the overall number. We have also taken the 5% of the sample that identifies as an engineering company and added that into the overall calculation also.

3.5.2 Contribution of the Profession

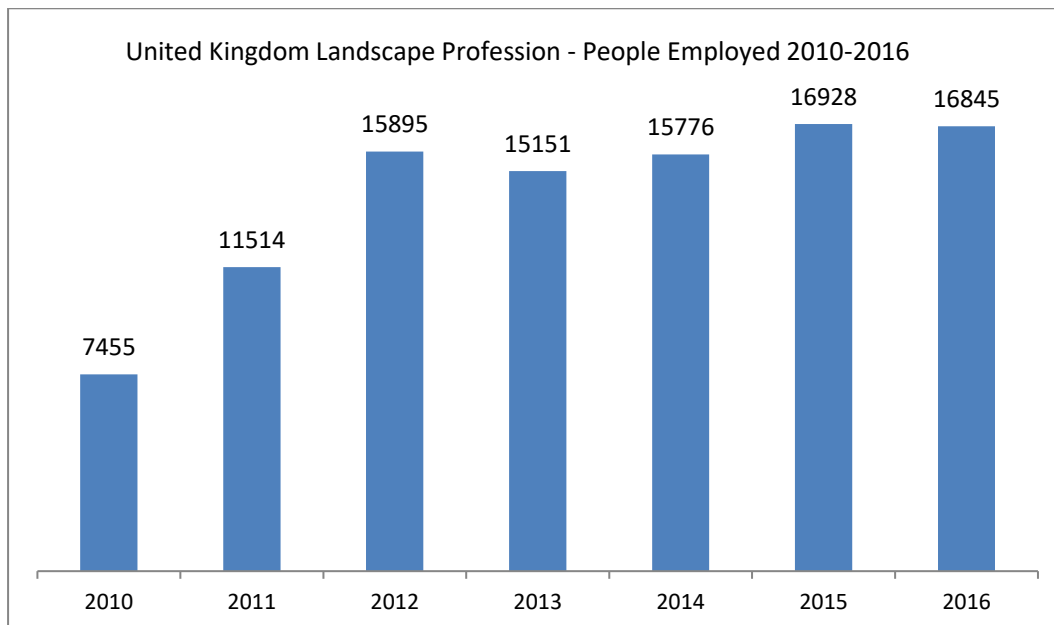
IN 2016 which is the most recent date that complete figures are available, the landscape profession in the UK was estimated to contribute £948m in AGVA (Average gross value add) or 0.04% of the total UK AGVA. To put this number in context architectural services contributed £5.1bn and the construction sector contributed £97.6Bn.



The contribution from the sector is estimated to have increased by 15.9% (Compound Annual Growth) from 2010 to 2016. This demonstrates a significant recovery following the global financial crisis. Since 2013 the sector has grown at a more conservative 6.8% CAGR. The growth since 2013 represents an increase of 22% in the total value of the sector.

3.5.3 People Employed in the Landscape Profession

In 2016 it is estimated that 16,845 people were employed in the landscape architecture and placemaking profession.



It is difficult to estimate what proportion of people employed in the sector can be classed as landscape professionals and therefore suitable for membership of the LI. If we assume for the purposes of this report that all people employed in the sector could be members, then the LI would have a penetration of approximately 25%. Further research would be required to understand the detail behind this and the opportunities within different types of organisations and the regional trends across the UK.

3.5.4 Comparison with the US

The American Society of Landscape Architects use GVA to measure the value of the Landscape Architecture sector in the US. In a report from 2015 they estimated the market to be valued at \$2.3Bn in the US. This Value was based on 2012 figures. If we assume US market growth broadly in line with the UK, then in 2016 the US would be valued at approximately \$3.17Bn (or £2.38Bn).

4 How can the LI use this Research?

The findings of the research provide several opportunities for the LI to develop, enhance and tailor its services based on feedback to address requirements for the sector.

4.1 LI Service Portfolio

Member requirements and support vary depending on where they sit in the value chain and the types of client they work for and the size of their company / scope of services they provide.

Detailed analysis of findings will enable the LI to segment membership into groups with common profiles and requirements for support. This will enable existing LI services to be better tailored and aligned to address these requirements for the identified key member profiles.

This provides a more 'personal' approach to services provided instead of 'one size fits all', perhaps offered via a 'My LI' link on the membership web site, where members can select / amend their preferences and access the services which are appropriate for their profile.

Keeping track of services provided and used by members, member profiles will enable the LI to provide benefits statements, particularly useful at the time when membership renewals are due, to prove the value provided by the LI to members.

This approach will enable services to be offered in a smarter way, without the need for increasing the resources required to deliver them.

4.1.1 Improved Communication

Segmentation and aligning of services to the membership profiles will enable more effective communications to be tailored to address specific requirements, making them appear more relevant to individual members / member profiles.

4.1.2 Membership Growth

Building on this analysis of membership profiles and developing these further into marketing personas would be an effective method of better understanding these sub-groups at both the member and the practice level.

This will assist with the development of the LI and in targeting of the right types of people and companies, tailoring marketing messages, benefits statements and information to address the needs and requirements of the different groups.

The development of benefits statements, including demonstration of the level of influence and publicity secured by LI, will support membership growth.

4.1.1 Business Support

Smaller businesses often struggle to follow robust processes relating to managing contracts, administration and HR due to a lack of resources. There is opportunity for their membership / professional body to provide supporting services for those who need this.

Services could be developed by LI and / or provided by linking with already established service providers such as the FSB (Federation of Small Businesses) currently offers this type of support to SME's.

4.1.2 Legislation Changes

This is a key role for the sector in ensuring companies comply with changes in legislation, including health and safety and more recently requirements relating to workplace pensions etc.

Many organizations in the profession rely on freelancers and contracted labour. The LI can play a vital role in assisting its members with keeping on top of regulations and legal requirements relating to this. For example, the Professional Contractors Group (PCG) was born of the need to fight the (infamous) IR35 legislation. This legislation remains the single most important factor

affecting PCG members, and the PCG continues to fight what it considers to be unjust and disproportionate legislation, through the courts and at Westminster.

Similar legislative changes to secure payment of taxes have affected other sectors where there is a high level of contracted services rather than employed workforce, including IT / software developers and the building sector.

4.2 Raising Professional Standards in the Sector

A key role for the LI is in enhancing the value in the sector, which can be achieved through raising professional standards in the sector, particularly of its members, so that consumers requiring landscaping services will choose LI members because of the standards imposed on its members.

The NAEA (National Association of Estate Agents) faced similar challenges in changing the public view of Estate Agents towards that of a profession, whereby house sellers would choose an NAEA agent in preference because their members all agreed to adopt a Code of Conduct, which was regulated by the NAEA.

There is an opportunity for LI to increase the level of influence and raise the profile of the profession by learning from similar professions. This could be through:

- Leveraging the larger member organisations who might already have influence
- Establishing a cross-discipline Council to support and promote the value of the profession and the unique perspective it brings
- Networking / linking with other professional memberships organisations to learn from their successes
- Developing an accreditation scheme to enable members to assess their practices against best practice
- Closing skill gaps – identifying skill profiles required for roles within the sector to enable members to improve their skill profiles and secure new work
- Graduate development – address issues raised with graduate recruitment

4.2.1 Developing an Accreditation Scheme

In many sectors there is a need to first define ‘what good looks like’ to enable companies to assess themselves against this and drive self-improvement.

Several models exist which can be tailored for any business sector. One such model is the business excellence model developed by the European Foundation for Quality Management (EFQM). The model looks at 5 business enablers (what an organisation does) including leadership, strategy, people, processes/ products/ services and partnerships/ resources and looks at 4 results (what an organisation achieves) in terms of customer, people, society and business results. It provides a vehicle for businesses to assess themselves against best practice irrespective of size or sector.

Other membership organisations have adopted similar accreditation to differentiate their members from non-members including:

- The RIBA scheme for architects, providing chartered status for members and practices
- The Good Garage Scheme which formed because of the need for effective self-regulation of independent workshops and MOT centres. Garages that join the scheme adhere to a strict Code of Conduct and work to an Industry Standard Checklist.

There is therefore an opportunity to create and develop a benchmarking scheme which accredits on best practice for landscapers.

A scheme could be developed by the LI for member accreditation around best practice (EFQM) which gives users of landscape and related services piece of mind and the ability to compare providers based on a consistent set of criteria.

4.2.2 Closing Gaps in Available Skills

Employees in the Public Sector demonstrate a unique set of skills. Challenges for landscape professionals in the public sector with salary freezes and drops in funding means that the LI can assist employees in developing their expertise in the sector to make their role more attractive for securing new contracts (E.g. an ecologist receiving Landscape training) or for preparing public sector employees with the skills to transition into the private sector.

Further analysis of the sector skills by membership profile and mapping this to the services required within the sector will enable the LI to develop appropriate training course to fill skill gaps.

4.2.3 Graduate Development

Feedback from members suggested that graduate courses were not currently providing the right calibre of new graduates who were sufficiently enthused to work in the sector. Expectations were high, and yet skills not necessarily sufficiently developed to provide an active contribution in their first jobs.

There is potential for the LI in assisting the profession with keeping graduates engaged in the profession by devising schemes and graduate development programmes to help develop young people. The provision of on-going training and practical work could help bridge the gap for graduates leaving full time education and moving into full time work.

For example, the Integrated Graduate Development Scheme (IGDS) was established through Warwick University to support the automotive sector initially where skills were identified from engineering graduates entering full time employment. The scheme was partly funded by industry and had Government support. It involved a series of residential one-week course modules attended at the University, with project work carried out in the workplace. These courses were seen to add significant value to the sector but also were attractive to graduates, who often have trouble in transitioning from full time education into the reality of the work place.

The LI could manage a graduate training scheme for membership practices based around the skills gaps being identified by the research.

In addition, smaller practices could 'share' a pool of graduates and offer a greater level of experience / induction by enabling graduates to move around practices to gain a wider appreciation of the work available to them and in so doing, gain a wider experience and improve skill levels.

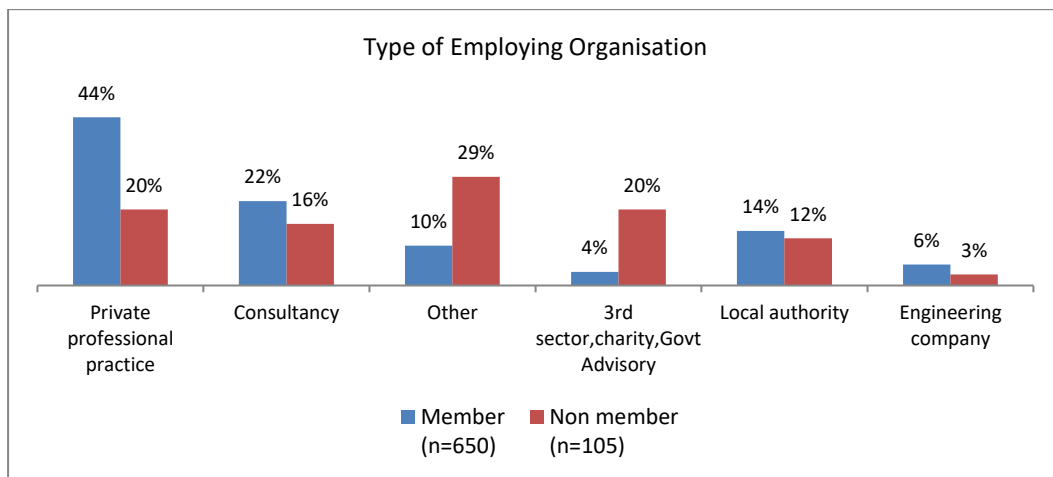
5 Appendix: Non-Member Respondents

In the earlier drafts of this report, information was shown relating to non-member respondents. Following discussions with the Landscape Institute, it was decided that, although this might be indicative, the sample size was too small and of an unknown composition in relation to the large number of potential non-member respondents to be used for the main body of the final report.

Nonetheless there are some indicative results that can be drawn from this subset and from the combined samples as follows:

5.1 Practice Profile

5.1.1 Types of Employing Organisation

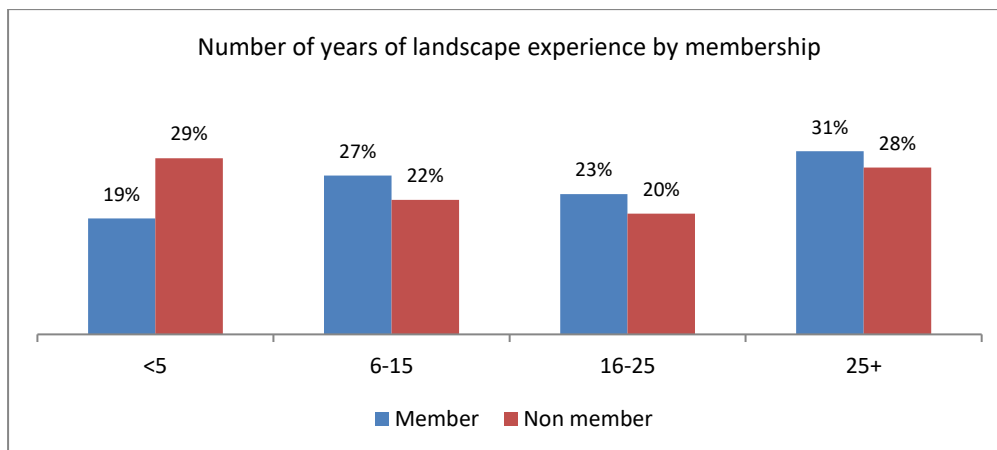


The results suggest that the organisations that non-member respondents work for is much more diverse than that for members of the LI.

20% work for 3rd sector, charity or government advisory organisations, and 29% of non-members have classified themselves in the “other” category. This category includes landscape industry supplier companies, garden centres, private or publicly owned gardens as well as National Parks authorities, construction companies, and housing developers. (A more detailed breakdown of non-members, including health warnings about the findings is found later in the report).

5.1.2 Experience of Employees

There is no significant difference in terms of the seniority of job role between members and non-members. However, the results suggest that non-members are likely to have been in the profession a shorter period than members.

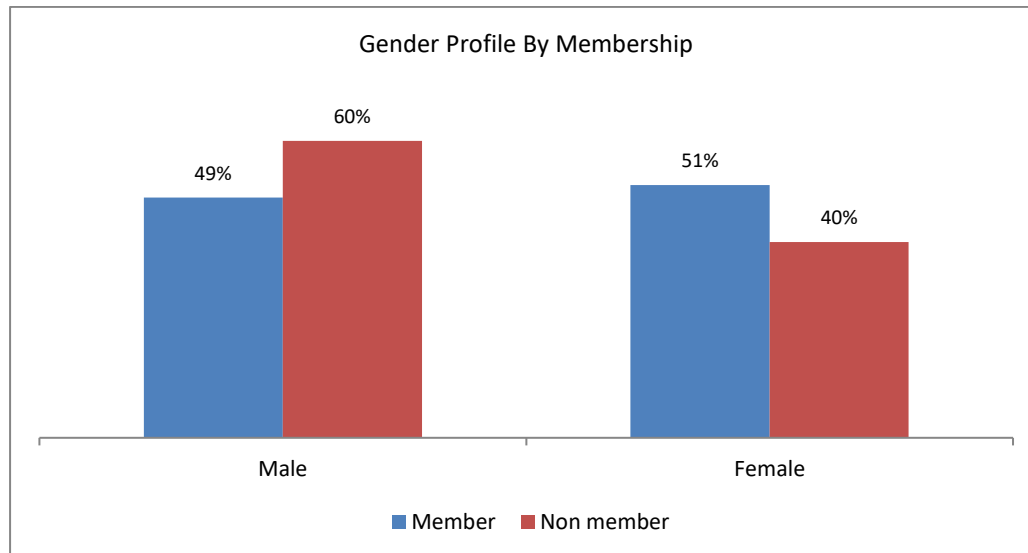


Base: All respondents

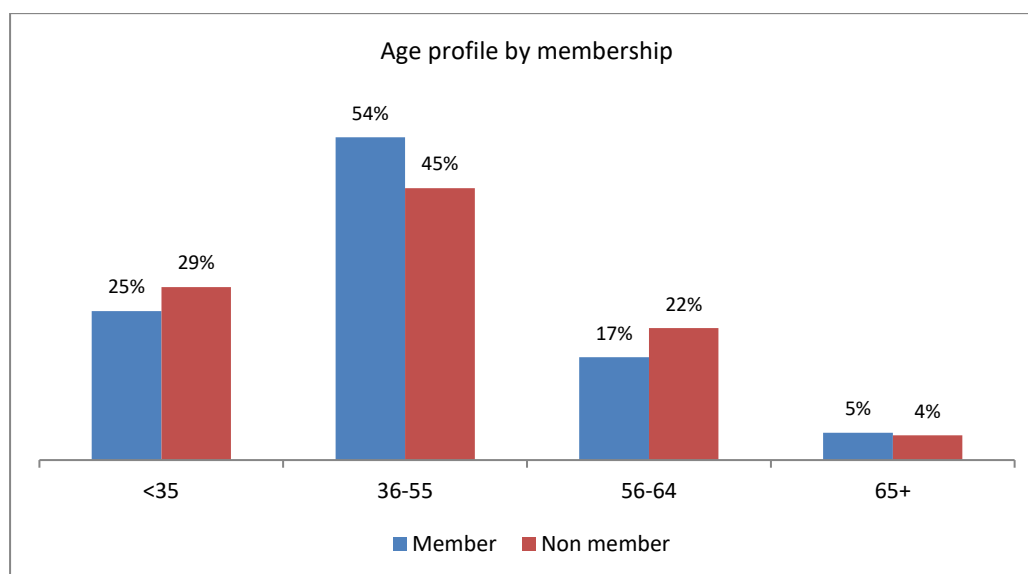
5.1.3 Demographics

In terms of demography, the results suggest that there is no significant difference in the gender, age and ethnicity of members and non-members.

Within the sample, 60% of non-members were male compared to only 49% of LI members, but this difference was not statistically significant and therefore could not be inferred across the wider profession.



Base: All Respondents (575)



Base: All Respondents (577)

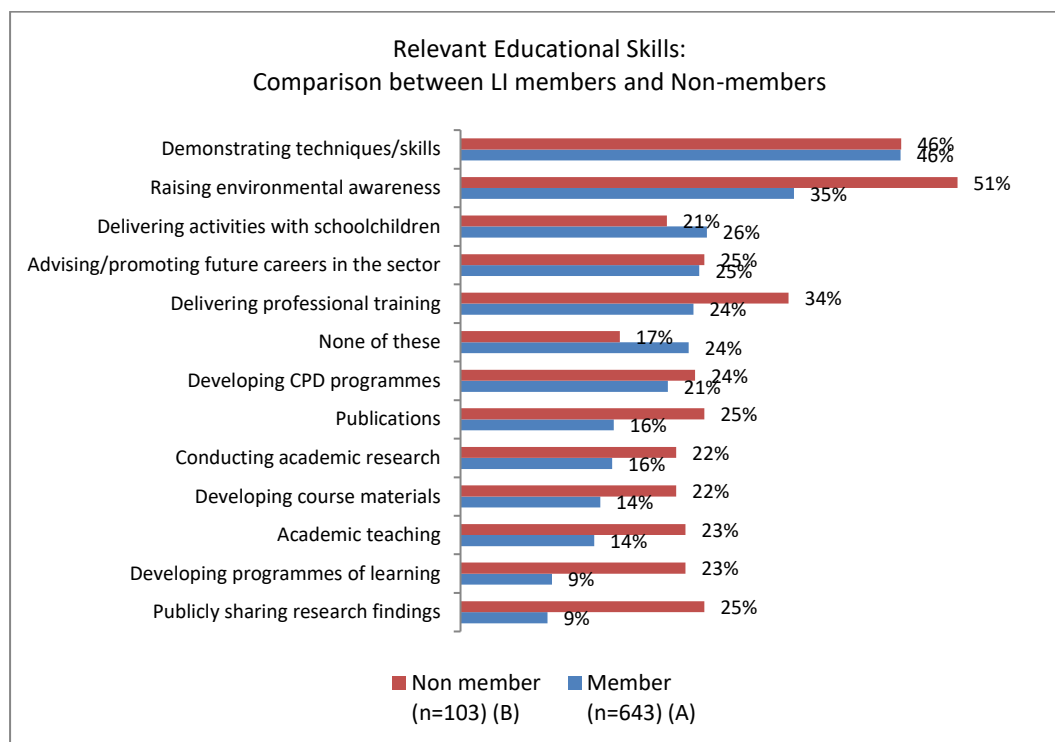
5.1.4 Landscape Management versus Design-Led Respondents

We have identified from the data a subset of respondents who identify themselves in terms of their skills as more Management-led than Design-led.

Management-led respondents are much more likely to be non-members of the Landscape Institute than Design-led respondents, 37% of the strong Design-led sub-group compared to only 6% for the strong management led sub-group.

5.2 Skills Requirements

5.2.1 Educational Skills



- Non-members demonstrate more skills in raising environmental awareness and delivering professional teaching.
- The range of skills overall is broader for non-members than members

5.2.1.1 Studying Institutions of Non-Members

Education level	Institution
Level 6	Manchester Met; The University of Liverpool ; Lancaster University; Manchester Polytechnic; Durham Uni; University Kassel, Germany (& Royal Architecture School, Copenhagen, Denmark); University of Gloucestershire ; University of Reading; University of Leeds; Gloucestershire College of Art and Design; University of Agricultural Sciences and Veterinary Medicine Cluj-Napoca; Cardiff University; University of Plymouth; Bradford ; University of North Wales, Bangor; RHS; Writtle University College; University of Chester
Level 7	Leicester; The University of Manchester; Cranfield University; Sheffield Uni, University of London; Uni of Gloucestershire; Edinburgh College of Art; Oxford University; Glyndwr University; Newcastle University; Wye College, University of London; MMU - Manchester; Open University; Writtle College; Warwick Business school

5.2.2 Skills Variances: Member versus Non-member Respondents



Landscape Institute members demonstrate more Urban Design, Design and Landscape Planning skills than non-members. However, non-members do show more skills in relation to education skills, such as activities with school children and developing programmes of learning.

LI members demonstrate more digital skills than non-members. This is linked to 3D Modelling, CAD, desk top publishing and other visualisation techniques.

The differences in Design skills for members vs non-members are much more apparent in skills related to *“Delivering typical elements of sustainable landscape design solutions”* and in *“Applying an understanding of the theory, historical practice, and required standards of design when developing solutions”*, where members are much stronger than non-members. Members are also stronger in relation to *“Delivering design solutions”* such as contaminated land and housing.

In Urban Design we see the largest gap in relation to relevant skills between members and non-members. This is particularly the case when we look at skills related to *“Basing solutions on an understanding of the physical environment”* specifically in urban contexts like townscape character and urban form and structure. *“Understanding urban systems”* is also a very strong for members compared to non-members in areas such as neighbourhoods, parking standards, pedestrianisation.

With Landscape Management the skills profile for members and non-members is quite similar when looking at *“initiating Landscape Management skills at a strategic level”*. However, the non-members in the survey are much stronger in relation to *“Managing for and with local users and visitors”* and especially in areas such as general visitor management, organising large scale events, and enforcing bye-laws.

With Landscape Science the profile for members and non-members is quite similar, in that compared to the other skills types these are the lowest observed. Landscape members are stronger in areas such as design theory, whereas non-members have more experience in more practical areas of the discipline, such as habitat surveying and biological recording.