



Lantra

The Sector Skills Council for
environmental and land-based industries

Skills Assessment for the Environmental and Land-based Sector in Northern Ireland

A report prepared by Lantra on behalf of the Department
of Agriculture and Rural Development (DARD)

September 2010

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Acknowledgements

Lantra would like to acknowledge a wide range of representatives from industry and education for their participation in, and support of, this research. Lantra is pleased to record its deep appreciation to all those who have given time to considering and discussing the environmental and land-based sector and its needs.

Lantra would also like to thank colleagues within the Department of Agriculture and Rural Development in Northern Ireland for their contributions in the development of the report.

The project team at Lantra included: David Seffen, David Swales, Michael Smith, Dr Nadine Flowers, Sara Maslowski and Dr Ruchira Pounds.

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Executive Summary

Lantra is the Sector Skills Council for the environmental and land-based sector covering Northern Ireland and the rest of the UK. It represents the interests of over 20,000 businesses and 63,000 employees within the land-based industries.¹

Lantra's role is to ensure that the land-based sector's skill needs are fully identified and met. It does not deliver training itself, but works through providing strategic leadership, influencing suppliers, employers, funding organisations and Government to ensure that the skills development needs of the sector are met.

Lantra has a strong presence in Northern Ireland and works closely with Lantra's Council for Northern Ireland (LCNI) which is an advisory group consisting of industry representatives and stakeholders, including the Department for Employment and Learning (DEL) and Department of Agriculture and Rural Development (DARD).

The Skills Assessment for the environmental and land-based sector in Northern Ireland forms part of a wider programme of research reviewing the supply and demand for skills within the sector in Northern Ireland. Lantra has been commissioned by the Department of Agriculture and Rural Development (DARD) to develop a comprehensive evidence base related to business demand for skills, and the appropriateness of current education and training provision.

The environmental and land-based sector comprises 17 different industries that fall within three broad clusters, namely land management and production (e.g. agriculture and production horticulture, aquaculture and floristry), animal health and welfare (e.g. equine, animal care, veterinary nursing and ancillary activities), and the environmental industries (e.g. environmental conservation, game and wildlife management).

To achieve the necessary coverage of this very wide and diverse sector primary research was undertaken principally by way of a telephone survey of 991 businesses. This was supplemented by detail obtained from industry focus groups and meetings with key industry representatives. This study is compatible with similar research conducted in 2005.

The survey identifies economic activity, employment and skill development needs in the industries within the Lantra sector in Northern Ireland. With such a diverse range of industries within the sector it is necessary to study the individual industry analysis and workforce profiles contained in the report and within this section there are some key points for the sector as derived from the survey. In addition data has been extrapolated to provide a picture of the sector as a whole in Northern Ireland.

¹ Lantra (2009) A Skills Assessment for the Environmental and Land-based Sector, Northern Ireland factsheet

Size and structure of environmental and land-based sector:

- In total there are approximately 25,264 farm holdings across Northern Ireland
- The environmental and land-based sector in Northern Ireland accounts for nearly one in every four businesses (23%)
- Most businesses are privately owned and/or sole proprietorships
- Business sizes are characteristically small with 98% of the businesses within the sector employing fewer than ten people
- Linked to the high level of micro-businesses, there is a high level of self-employment within the sector's workforce
- Agricultural livestock farms account for 77% of the sector's businesses

Workforce Characteristics:

- Working owners form a significant proportion of the environmental and land-based sector's workforce (52%)
- Within farming, working owners form an even higher proportion of the workforce, accounting for two thirds (66%) of those employed
- 44% of the workforce in the sector work full-time compared to 78% across all sectors
- Within farming, only a small proportion of the workforce is full-time (24%)
- Within farming, 18% of the workforce are aged 65+ compared to a 2% average across all sectors of the economy
- In addition, the sector as a whole, is male dominated with men accounting for 73% of the sector's workforce
- Farming is more male dominated than other parts of the sector, with men accounting for 80% of the workforce
- In contrast, the animal health and welfare cluster differs from other parts of the sector, with two thirds (67%) of employment being female
- 3% of the sectors' total workforce are migrant workers, this is particularly high in pig and poultry farms (22%)
- The attainment of recognised qualifications in the workforce is generally low, with 58% of working owners and 38% of employees not holding any formal or recognised qualifications
- The proportion of working owners holding qualifications decreases with age
- Working owners of larger businesses tend to be more qualified than the working owners of smaller businesses

Skill Needs, Gaps and Shortages:

- 2% of businesses surveyed in the sector reported a vacancy
- 1% of all businesses within the environmental and land-based sector reported having a hard-to-fill vacancy, the main cause for this was chiefly due to a “low number of applications with the required skills”
- Only 0.3% of businesses reported skills shortage vacancies
- Of the 991 businesses surveyed, 5.9% reported at least one skills gap amongst their workforce. Extrapolating this percentage to the size of the sector as a whole in Northern Ireland, this indicates there are approximately 5,350 people currently working who are not yet fully competent in their respective job roles
- In terms of the overall distribution of skills gaps between the industry clusters, extrapolated figures for farming businesses suggest that they have the highest number of skills gaps (3,600 of 5,350)
- In addition to practical and technical skills, the most commonly cited current skills required to become proficient included communication skills, planning and organising
- Some 6.9% of farm businesses have diversified, and a further 7.8% are planning to diversify in the next 5 years. By extrapolating the figures for the sector an estimated 1,790 farm businesses have diversified, and just over 2000 more are planning to diversify
- Those businesses involved in the diversification process identified the need to learn new skills, particularly in marketing and sales, accounts and communication skills

Training and Business Development:

- Just under half (47.1%) of businesses reported that they have never funded or arranged training for their staff
- 37.2% of businesses within the sector reported having arranged some form of training in the last 5 years
- Within the farming cluster only 17.4% of staff undertook training in the last 2 years. One possible reason for this is that the word “training” is associated with formal courses or those leading to recognised qualifications therefore it doesn’t take into account any other forms of update training they may have undertaken
- There were low levels (4%) of written business, training and development plans and this is recognised as a current and future skills need
- Focus group participants indicated that they rarely undertook training outside that which is required for compliance. Practical skills development was viewed as being acquired “while doing the job” and not necessarily as part of any formal programme
- Almost half (48%) of businesses have funded the last training activity undertaken within the business. There is a need to raise awareness of any subsidies and funding available to businesses
- The most commonly cited reasons by businesses for not training were cost, the loss of time to do training and that staff did not require any training

Drivers for Change:

- The degree of change occurring within the environmental and land-based sector is significant for the short term² (e.g. labour supply; economic conditions; changing approaches to land management to name but a few); medium term³ (e.g. technological advancement); and long term⁴ (e.g. climate change, food, energy and fuel security). Legislation was thought to be a driver of change in the sector across all of the industries due to the changing market place and competitive pressures
- These changes provide a driver for the increased professionalism of the sector; increasing demands are being placed on agriculture, which will lead to the need for a higher level of skills within the workplace to manage change
- The Common Agricultural Policy (CAP) subsidies for production have been removed, with farms now only receiving payments in the form of the Single Farm Payment for environmental management. This may lead to the consideration of economies of scale given the concentration of small farms⁵ in Northern Ireland

Future Employment Trends:

- The Working Futures projections show employment in the sector is expected to fall by 3% from 2007 to 2017
- Small farms are expected to continue to close or be consolidated within larger units. Larger farms are better able to substitute labour with machines (and so overall employment levels may fall)
- Diversification will become more apparent. Such diversification frequently involves a higher value-added component, for example, leisure and tourism where moves towards increased customer contact and retail functions would be required

In summary, the survey identifies significant economic activity, employment and skills development needs for the environmental and land-based sector in Northern Ireland. In addition, industry-specific summaries have been included in the report and there is evidence for a series of key findings that meet business requirements.

² Next year

³ 1 – 5 years

⁴ 5 years +

⁵ See Section 2.2

Skills Assessment for the Environmental and Land-Based sector in Northern Ireland

September 2010

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1.0 Introduction

The Skills Assessment for the environmental and land-based sector in Northern Ireland forms part of a wider programme of research, reviewing the demand for skills within the sector in Northern Ireland. Lantra has been commissioned by the Department of Agriculture and Rural Development (DARD) to develop a comprehensive evidence base related to business demand for skills, and education.

This Skills Assessment provides a current picture of employer skill needs within the environmental and land-based sector⁶ in Northern Ireland. It is based upon a comprehensive review of changes identified, and evidence collated over the past year.

The specific aim of this research report is to:

Aim 1 Research the demand for education and skills from land-based industries, and assess how this demand is likely to change over the next 10 years.

This report has the following objectives:

- Profile the environmental and land-based sector in line with the broader Lantra footprint
- Identify the key challenges/drivers for change in the sector pertinent to education and skills
- Consider the implications for the level and range of education, skills and behaviours required in the future. In particular, identify the barriers that exist to the uptake of education and skills in the sector
- Assess employer's current education, skills and training practices and attitudes to recruiting graduates, college leavers, school leavers etc. Assess their views on the relevance of education and skills to the development of their business
- Assess employer's education, skills and behavioural needs (both technical and generic) in terms of their nature, volume and National Vocational Qualification level
- Assess how employment and career opportunities will change over the next 10 years and the implications of this for education, skills and qualifications
- Make recommendations to inform actions for incorporation into the future DARD Education Strategy

⁶ A definition of the sector is outlined in Section 1.2

1.1 Definition of the Environmental and Land-Based Sector

Lantra defines the environmental and land-based sector in terms of 17 industries. Although these industries have many unique characteristics and skill requirements they also have some skill requirements and training activities in common. Whilst continuing to meet the specific needs of individual industries and the sector as a whole, Lantra also groups industries around three broad clusters:

- Land management and production*
- Animal health and welfare
- Environmental industries

A number of the industries have interests that cross over between the different clusters but they are classified on table 1.1, based on their primary interests.

Table 1.1 Industries within the environmental and land-based sector (Lantra footprint)

| Land management and production* | |
|---------------------------------|---|
| • Agricultural Crops | • Trees and Timber |
| • Agricultural Livestock | • Fencing |
| • Production Horticulture | • Floristry |
| • Aquaculture | • Land-based Engineering |
| Animal health and welfare | |
| • Animal Care | • Farriery |
| • Animal Technology | • Veterinary Nursing and Ancillary Activities |
| • Equine | |
| Environmental industries | |
| • Environmental Conservation | • Fisheries Management |
| • Game and Wildlife Management | • Horticulture, Landscaping and Sports Turf |

* Includes Services to Agriculture, e.g. agricultural contracting

Further details of the definition of these industries and their links to the Office of National Statistics Standard Industrial Classification (SIC) can be found in Appendix A.

1.2 Context

Business Environment

Over the past 25 years the Northern Ireland economy has achieved a rapid rate of economic growth relative to other parts of the UK. Employment growth in Northern Ireland has expanded faster than most other UK regions with an average annual growth rate of 1.25% between 1984 and 2009, compared to 0.6% across the UK as a whole⁷. However, Northern Ireland continues to lag behind the rest of the UK on a range of indicators, for example, Gross Value Added (GVA) per capita in Northern Ireland has been approximately 80% of the UK average since the mid 1990s. In addition, Northern Ireland performs below the UK average in terms of labour productivity and unemployment^{8,9}.

The UK economy technically entered recession in the fourth quarter of 2008 when there was a further contraction in GDP output of 1.5 per cent¹⁰. In Northern Ireland the performance of the economy in response to the external shocks it has faced has impacted on employment levels. Since late 2007 the number of unemployment claimants has doubled and the International Labour Organisation (ILO) unemployment rate¹¹ has increased from 4% to 6%, meaning there are an estimated 49,000 people unemployed in Northern Ireland¹².

Official data on the economic performance of the sector in Northern Ireland is not published on a quarterly basis. The latest available figures show that Gross Value Added in Agriculture fell by 0.5% between 2007 and 2008¹³. This compares to a 3% growth across the Northern Ireland economy as a whole¹⁴. Over the same time period there was significant growth to agricultural GVA across the rest of the UK. Between 2007 and 2008 agricultural GVA rose by 28% in England and by 22% across the UK as a whole.

7 Department of Enterprise, Trade and Investment/Invest NI (2009), Independent Review of Economic Policy

8 Review of the Competitiveness of Northern Ireland, Sir David Varney, April 2008

9 Department of Enterprise, Trade and Investment/Invest NI (2009), Independent Review of Economic Policy

10 Office of National Statistics (2009, Q2), Quarterly National Accounts

11 The International Labour Organisation definition of unemployment and is derived from the Labour Force Survey, and includes people who are out of work and actively seeking employment. Rates are expressed as a percentage of the economically active, not as a percent of the working age population.

12 Department of Enterprise, Trade and Investment (Feb 2010), Monthly Labour Market Report

13 Department of Agriculture and Rural Development (2009), Statistical Review of Northern Ireland Agriculture 2008

14 Office of National Statistics (2009), Statistical Bulletin: Regional, Sub-regional and Local GVA

However on a UK wide basis the environmental and land-based sector has weathered the impact of recession better than many sectors. Across the UK GVA in the agriculture, forestry and fishing sectors declined by 5.6% between quarter 1 2008 and quarter 3 2009. This compared to a decline of 13.8% across all production industries and 5.7% across the economy as a whole¹⁵.

During the current period of uncertainty, it is important that the skills system can meet the challenge of a global economic downturn. In the past, skills shortages have slowed the pace of economic recovery when it has occurred¹⁶. Northern Ireland, like other parts of the UK, has an advanced educational system; despite this the UK skills base remains weak by international standards (Leitch, 2006)¹⁷. Therefore, a good understanding of labour market intelligence for the sector is vital to ensure that government, employers and individuals are able to make appropriate investments in skills, which meet current and future demands.

As a consequence, considerable efforts are being made to ensure that employers and employees adopt a view of skills acquisition and qualifications as a key driver to assist business development, increase productivity and build sustainable growth. To support this ambition government have developed a network of Sector Skills Councils within the educational sector. They are licensed by the UK Commission for Employment and Skills (UKCES)¹⁸ to tackle the sectoral skills and productivity needs throughout the UK. There are currently 25 SSCs covering over 90% of the UK economy.

Lantra is the Sector Skills Council for the environmental and land-based sector; it is an employer-led organisation representing the interests of over 230,000 businesses and 1.5 million workers engaged in the environmental and land-based industries in Northern Ireland, England, Scotland and Wales. Further information on the scope and coverage of industries represented by Lantra can be found in Appendices A and B.

Lantra also has a defined role to identify future skills needs, developing skills and training solutions, setting occupational standards, influencing and shaping the future development of qualifications, designing apprenticeship frameworks, encouraging greater investment in training by employers and providing labour market information that assists in long-term business planning.

¹⁵ Office of National Statistics (2009, Q2), Quarterly National Accounts

¹⁶ Blake N, Dods J and Griffiths S (2000), Employers Skill Survey: Existing Survey Evidence and its uses in the analysis of Skills Deficiencies

¹⁷ HM Treasury (2006), Prosperity for all in the Global Economy: Leitch Review of Skills

¹⁸ <http://www.ukces.org.uk/sector-skills-councils/about-sscs/>

Food Security

The food-producing and environmental parts of the sector have come under increased scrutiny over the past year as the challenge for food security and climate change have attracted increased interest from government. Specific to Northern Ireland, the Food Strategy Group (FSG) developed a broad strategy to support SMEs¹⁹ within the agri-food sector. The FSG produced a report: "Fit for Market" 2004, which made a series of recommendations for the growth of the Northern Ireland agri-food sector. These recommendations were based around market understanding and development; fostering innovation; supply chain development; capability development; the allocation of resources; and supporting the development of alternative employment.²⁰ The report highlighted the importance of equipping individuals with the right skills, competencies, qualifications and appropriate remuneration as key components of implementing the strategy. The report also cited the responsibility of government to ensure that the necessary education and training infrastructure is in place and properly resourced, but also the requirement of industry to invest in training and life-long learning, which supports business development needs.

At a UK level, in January 2010 the UK Government launched a food strategy: "Food 2030".²¹ The strategy considers the food system at national, EU and global levels and explores what actions are necessary to achieve a secure and sustainable food system. The report highlights skills improvement as an important factor in delivering the strategy; in particular the need for training providers and government to recognise existing and develop new skills, and promote skills development as central to business success and professionalism. The report also reflects the need to promote the industry as a good place to work.

At the global level, recent research by the Smith Institute²² highlights that there are long-term changes facing the sector brought about by population growth, economic growth in key emerging economies, changing dietary patterns, finite land availability, climate change, the continuing availability of key resources, the energy challenge (including the competition between crops for bio fuels and food) and a slowdown in the rate of increase of food productivity.

19 Small and Medium Sized Enterprise

20 Food Strategy Group (2004), Fit For Market (*currently under review*)

21 HM Government (2009), Food 2030

22 The Smith Institute (2009), Feeding Britain

Economic Reviews and Publications

Sir David Varney's Review of Competitiveness

In April 2008 the “Review of the Competitiveness of Northern Ireland”²³ was commissioned by the Chancellor to identify measures to promote private sector investment and enhance competitiveness in Northern Ireland. The review cited a number of existing strengths to support business development and investment, including a young population, a good education system and effective transport links with the UK, Ireland and the rest of Europe. The Varney Review made recommendations to the Northern Ireland Executive and the UK Government in a number of areas, including that of skills. It highlighted the need for the Northern Ireland Executive to focus on the essential skills in numeracy and literacy of those in education, as well as those currently in the workforce. The review also called for the improvement of intermediate and higher level skills. Specific recommendations included:

- Consideration of how to increase supply and take-up of youth and adult apprenticeships
- Appropriate careers information provided in schools
- Exploration of bursaries and their potential impact on the uptake of those skills as demanded by the economy
- A focus on attracting students and graduates with relevant skills from outside Northern Ireland

The report also highlighted the need for north/south co-operation to improve cross-border job opportunities.

The All-Island Skills Study

The Northern Ireland Skills Expert Group and the Expert Group on Future Skills Needs in Ireland jointly commissioned this study, which was published in 2008²⁴. The study provided an analysis of current skill demand across the island of Ireland. The report explored the demand for skills (vacancies, skills shortages and gaps) and future skills needs, general economic prospects and employment forecasts for a range of sectors and occupations. The report also highlighted the move from traditional skills towards higher value service sector and hi-tech manufacturing activities.

²³ Review of the Competitiveness of Northern Ireland, Sir David Varney, April 2008

²⁴ All-Island Skills Study, 2008

Report of the STEM Review

The Department of Education and the Department for Employment and Learning commissioned the STEM Review in 2007²⁵. This was against a backdrop of declining numbers of students studying science, technology, engineering and mathematics (STEM). The report cited the need to develop links between schools, further education and industry to support effective careers guidance. The report outlined 20 recommendations grouped under four “imperatives”:

- Imperative 1 - Business must take the lead in promoting STEM
- Imperative 2 - The need to alleviate key constraints in the STEM artery
- Imperative 3 - The need to have increased flexibility in the provision of STEM education
- Imperative 4 - Government must better co-ordinate its support for STEM

The report outlines the importance of STEM in education, society and in the economy. The overarching concern within the report is that there will be insufficient people with the skills and knowledge to grow STEM based businesses, which may impact on future economic growth and prosperity.

MATRIX

The STEM Review complements the work of “MATRIX²⁶” established by the Northern Ireland Science Industry Panel in 2006. MATRIX was tasked to produce evidence-based and targeted advice to help guide the Department of Enterprise, Trade and Investment develop policies for maximising economic return from the commercial exploitation of research and development (R&D) and science and technology in Northern Ireland. In support of this, MATRIX undertook a foresight initiative known as the Horizon Programme, which identified five key technology areas as follows:

- Information and Communications Technology (ICT)
- Agri-food
- Advanced materials
- Advanced manufacturing (transport)
- Life and health science

MATRIX also identified four imperatives for Northern Ireland if it is to rise to the challenge of the 21st century, one of which states: “Skills are the bedrock of the modern innovation-based and knowledge economy, right through from the schools system, to further and higher education and on into lifelong learning. Increasingly a highly developed skills base will be a key source of a competitive advantage in the global economy.

²⁵ Report of the STEM Review', September 2009

²⁶ The first report of MATRIX, The Northern Ireland Science Industry Panel, Volume 1, 10.8

Therefore Northern Ireland must set out to align the continuum of the skills and training regime to the future focused needs and requirements of Northern Ireland's higher value added goods, services and industries."

The report makes reference to the weakness in skills, which is cited as a barrier in securing finance to support innovation, with the recognition that there is also a shortage of appropriate skills to progress the overall agri-food sector.

Policy Context

Recent government policy has encouraged the demand for skills and quality education to meet the needs of business. Skills and education developments are now at the core of European, national and local policy initiatives; as such skills and education are now recognised as key drivers of the economy.

Northern Ireland Programme for Government (PfG) (2008-2011)

The Northern Ireland Programme for Government (PfG) (2008–2011)²⁷ sets the overarching priorities and investment strategy for the Northern Ireland economy. The Programme for Government sets out what is going to be done by each government department, and the themes that cut across departments. Within the Programme for Government there are five key strategic areas for development, which are interconnected to the priority of "growing a dynamic and innovative economy". A successful economy is characterised by high productivity, a highly skilled and flexible workforce and employment growth (PfG, 2008-2011). Skills development and educational attainment are therefore key elements of the ambition of government to address productivity gaps and stimulate economic growth.

In support of this ambition the Programme for Government sets out a number of key targets to drive up the demand for skills acquisition; this includes actions on achievements at GCSE level or equivalent for both school leavers and the working age population. The Programme for Government also sets targets on the number of adult learners achieving a qualification in literacy, numeracy and ICT skills, and an increase in the number of students, especially those from disadvantaged communities studying at graduate and post-graduate level, studying Science, Technology, Engineering and Mathematics (STEM subjects) by 2015.

²⁷ Northern Ireland Executive (2008), Northern Ireland Programme for Government (2008-2011)

To support the achievement of the skills and educational development targets, the Programme for Government encompasses the following aims:

- **SKILLS FOR PROSPERITY** - Aim: Ensure our people have the right skills to deliver economic prosperity now and in the future, and increase skills and career choices in STEM subjects
- **INCREASING EMPLOYMENT** - Aim: Subject to economic conditions, increase employment levels and reduce economic inactivity²⁸ by addressing the barriers to employment and providing effective careers advice at all levels
- **HELPING OUR CHILDREN AND YOUNG PEOPLE TO ACHIEVE THROUGH EDUCATION** - Aim: Encourage all our children to realise their potential by improving access to formal and non-formal education, and provision tailored to the needs of disadvantaged children and young people
- **SUPPORTING RURAL BUSINESSES** - Aim: Help agri-food businesses and rural SME's develop and grow and contribute to a more sustainable environment

Within the Programme for Government key actions for the Department of Agriculture and Rural Development (DARD) is the delivery of business development measures through the NI Rural Development Programme 2007 – 2013, the fisheries programme and the DARD education programme. Key Public Service Agreement targets include 1600 people either entering employment or working in the agri-food sector with a new qualification at level 2 or above for each year between 2008 and 2011. Additional targets include the increase by 5% in the performance of assisted farm businesses by 2011, to include 1000 people benefiting from ICT initiatives.

The aforementioned elements are not an exhaustive list of the actions to promote skills, educational attainment and economic development but are representative of the key Public Service Agreement (PSA) targets within the PfG.

Department for Employment and Learning (DEL)

The Department for Employment and Learning's Skills Strategy for Northern Ireland, "Success Through Skills" was launched in 2006²⁹. Its key aim is to raise the overall skills level in Northern Ireland, to include those who are not in work, by providing the skills necessary for economic activity³⁰.

28 The International Labour Organisation (ILO) definition of economic inactivity covers people who are out of work and not activity seeking employment. As such they are people who are neither employed or unemployed.

29 Department for Employment and Learning (2006), Northern Ireland Skills Strategy, Success Through Skills
http://www.delni.gov.uk/skills_strategy_2006.pdf

30 The Northern Ireland Skills Strategy 'Success Through Skills' is currently being refreshed with revisions expected 2010.

The Skills Strategy aims to help individuals progress up the “skills ladder”, improving their overall skills level; as well as improve the employability and skills of those excluded from the labour force, particularly through the Welfare to Work initiatives and also to ensure high productivity and competitiveness to secure Northern Ireland’s position in the global marketplace. To support development of the aforementioned aims the strategy identified four broad themes as follows:

- Understanding the demand for skills
- Improving the skills levels of the workforce
- Improving the quality and relevance of education and training
- Tackling the skills barriers to employment and employability

Essential skills, employability skills, work-based skills, actions to support leadership and management skills, and further and higher education are also highlighted. Actions to support careers information, and advice and guidance are also an important part of the delivery mechanisms to support the implementation of the aforementioned themes; as is the role of Sector Skills Councils in supporting delivery across the skills landscape.

The Skills Strategy also cites the ambition to ensure all Key Stage 4 learners (aged 14-16) and those post-16 are offered a wide range of vocational subjects within the education curriculum, to include vocational training which is recognised as a valuable alternative to the traditional academic pathway. This initiative has been developed in conjunction with the Department for Education (DENI) and is referred to as the “Entitlement Framework”³¹.

In response to the current economic downturn DEL have introduced a funded intervention which supports young people who are unable to find employment as an apprentice, with the opportunity to gain an industry approved level 2 apprenticeship qualification in their chosen skill area³².

The strategy includes a vision for skills that underlines the commitment to an employer-led approach. In developing the vision, the Department for Employment and Learning supported the development of six Workforce Development Forums (WDF)³³.

The Workforce Development Forums comprise local stakeholders, employers and Sector Skills Council representatives, with each forum operating within the distinct geographical areas as represented by the six regional FE colleges, who also provide secretariat support. The overarching role of the WDF is to bring together the supply and demand sides of the skills issue at sub-regional levels to identify local skills training needs and to advise government departments and agencies on matters affecting the demand and supply of skills in the local area.

31 See: http://www.deni.gov.uk/22-circular_2006-24_approval_of_qualifications.pdf

32 See http://www.delni.gov.uk/2222p_del_prog_led_app_lr_final.pdf

33 <http://www.delni.gov.uk/workforce-development-forums>

While the Department for Employment and Learning (DEL) has the primary responsibility for skills and employment functions, the Department of Agriculture and Rural Development (DARD) plays a central role in delivering education, training and development for the land-based and environmental sector.

Department of Agriculture and Rural Development (DARD)

DARD mainly delivers its agricultural education and training through its specialist college, the College of Agriculture, Food and Rural Enterprise (CAFRE) comprising Greenmount, Enniskillen and Loughry campuses. There has also been delivery through rural community groups and support through Queen's University, Belfast and wider post-graduate courses.

DARD's Strategic Plan 2006 – 2011³⁴ outlines the need for delivery of education programmes related to sustainable farming methods, a targeted strategy for Research and Development and technology transfer, to include the development of a lifelong learning strategy. It is envisaged that this policy will work alongside the wider DEL review of education, while retaining a strong focus on agri-food and related education, training and development.

DARD's Rural Strategy 2007 – 2013³⁵ builds on the principles of the Strategic Plan by providing a framework for the development of rural policy in Northern Ireland. The overall theme of the strategy is "diversifying the rural economy, protecting the rural environment and sustaining rural communities".

Key components of the strategy highlight the need for improved business and technical skills and the improvement of knowledge transfer and investment in people as a key means for supporting farmers and farm business training; re-skilling and the adoption of ICT technologies are also cited as key to improving long-term competitiveness. Enhancing the economic opportunities and supporting business creation and development, including the diversification of farm businesses into non-agricultural activities are also areas requiring new and/or improved skills.

³⁴ Department of Agriculture and Rural Development (2006) Strategic Plan 2006-2011

<http://www.dardni.gov.uk/dard-strategic-plan-2006-2011.pdf>

³⁵ Department of Agriculture and Rural Development (2007) Rural Strategy 2007-2013

<http://www.dardni.gov.uk/pubs-dard-rural-strategy-2007-2013>

Northern Ireland Rural Development Plan (NIRDP) 2007 – 2013³⁶ is the main delivery mechanism for DARD's Rural Strategy. It targets support at specific areas using a combination of European Union and national funds. The NIRDP contains a number of measures under each axis as follows:

- Axis 1 – Improving the competitiveness of agriculture and forestry by supporting restructuring, development and innovation
- Axis 2 – Improving the environment and countryside by supporting land management
- Axis 3 – Improving the quality of life in rural areas and encouraging diversification of economic activity

Axes 2 and 3 are important components of the NIRDP; however Axis 1 provides opportunity with regard to skills development and creating the demand for skills acquisition. Skills development opportunities within the programme offer farm family members' financial assistance to enhance existing skills (up-skilling) or develop new, work-related skills (re-skilling), which may provide an opportunity to generate additional income.

Summary

Skills are widely accepted as the key component in the modern knowledge-based economy. As such, they are a key driver in achieving Northern Ireland's economic goals. Lord Leitch in his report: "Prosperity for All in the Global Economy – World Class Skills]" concludes that the skills of our workforce are "the most important lever within our control to create wealth and to reduce social deprivation"³⁷. The Northern Ireland Executive's Programme for Government identified their highest priority as growing a dynamic and innovative economy ["characterised by high productivity, a highly skilled and flexible workforce and employment growth". The skills of Northern Ireland's workforce therefore have an important role to play as skills acquisition is seen as a major contributor to support business productivity while simultaneously helping individuals achieve personal goals for themselves, their families and their communities.

1.3 Research Design and Methodology

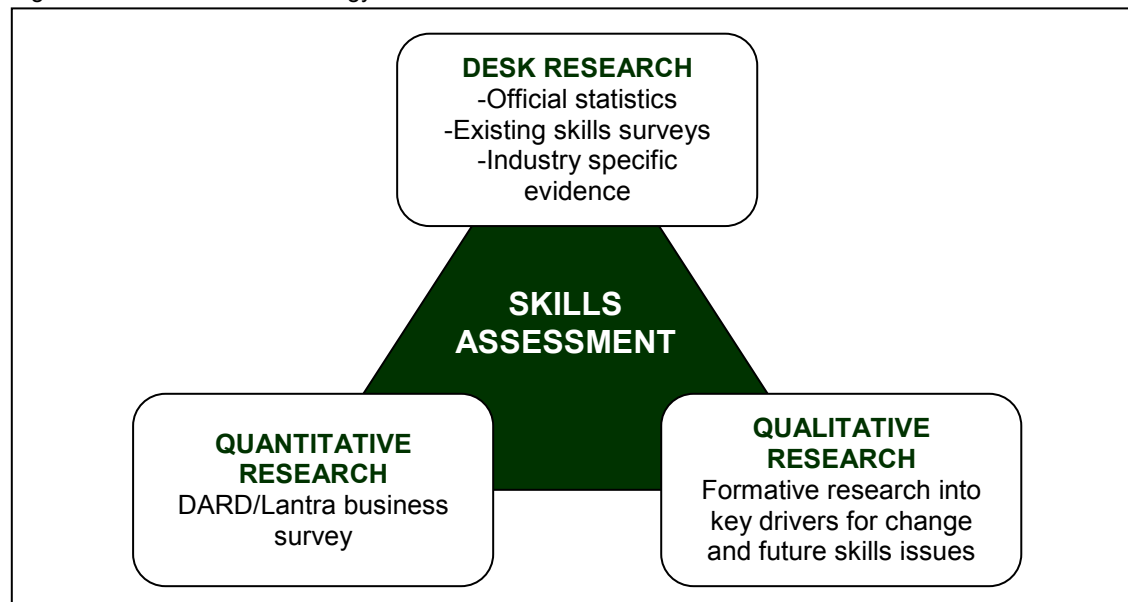
Accurately measuring the size and structure of the environmental and land-based sector is difficult. This is due to both scarcity of data and also the way in which some of the available data is published. For some industries, determining the total number of businesses is possible, but determining the number of people employed is problematic. For other industries, the reverse is true.

³⁶ The European Agricultural Fund for Rural Development (2007), Northern Ireland Rural Development Programme 2007–2013 <http://www.dardni.gov.uk/index/rural-development/nirdp2007-2013.htm>

³⁷ HM Treasury (2006), Prosperity for all in the Global Economy: Leitch Review of Skills

The Skills Assessment for the Environmental and Land-based Sector in Northern Ireland has employed a range of research activities starting with a desk review of existing research, and then targeting primary research where there were gaps in the existing information.

Figure 1.1 Research methodology for skills assessment



Desk Research

A comprehensive review of Labour Market Information sources was undertaken. This report draws from existing data, research reports and intelligence sources to investigate current and future demand, recruitment issues, skills needs and skills gaps.

Wherever possible Official Statistics, such as the Inter-Departmental Business Register (IDBR)³⁸, Labour Force Survey (LFS)³⁹, Northern Ireland 2008 Skills Monitoring Survey⁴⁰, Working Futures III⁴¹ and the DARD Agricultural Census⁴² are used to ascertain business and employment numbers. For readers interested in the sources and methods used to ascertain the numbers, these are available in Appendix B. In order to supplement official data sources additional primary research has been undertaken to both supplement and complement existing data.

38 Office of National Statistics (2008) Inter-Departmental Business Register

39 Office of National Statistics, Labour Force Survey (2008)

40 IFF Research (2009), Northern Ireland Skills Monitoring Survey 2008, Sector Skills Councils Report, Department for Employment and Learning (**NOTE:** Lantra sector covers environmental and land-based industries but excludes agriculture)

41 Working Futures 2007-2017, UK Commission for Employment and Skills

42 Department of Agriculture and Rural Development (2009), The Agricultural Census in Northern Ireland

Primary Research

The primary research involved both quantitative and qualitative elements. These included a telephone survey of 991 sector businesses based in Northern Ireland, conducted between November 2009 and January 2010. This was augmented by two focus groups conducted in February and March 2010, together with significant engagement with the College of Agriculture, Food and Rural Enterprises' (CAFRE) College Advisory Group (CAG).

The focus groups were held to identify the key challenges/drivers for change in the sector pertinent to education and skills, to consider the implications for the level and range of education and skills and behaviours required in the future, and in particular, to identify the barriers that exist to the uptake of education and skills in the sector.⁴³ A further focus group was conducted in May 2010 with representatives from the equine industry in Northern Ireland, which helped supplement areas of the research around vacancies and skills needs. Appendix C provides details of the stakeholders who attended the focus groups and appendix D provides details of the discussions held by these stakeholders.

The business survey was administered via a series of telephone interviews with relevant business representatives (a copy of the questionnaire can be found in Appendix E). The questionnaire was split into the following sections:

| Section | Title of section |
|---------|-----------------------------------|
| A | Business Details |
| B | Qualifications |
| C | Skills Gaps |
| D | Skills Issues |
| E | Training |
| F | Recruitment |
| G | Financial Issues/Recession Impact |

Telephone interviews as a means of data collection were deemed the most appropriate in light of project time scales, costs and the need to achieve a suitable response rate across the varied industries. Following a tendering exercise, Millward Brown Ulster were contracted to carry out the data collection stage of the research.

The contact details for non-farm businesses were purchased from the Experian National Business Database. These were checked and processed thoroughly by both Lantra and Millward Brown Ulster for accuracy in accordance with industry definitions. The contact details for farm holdings were provided by DARD.

⁴³ Further details are outlined in Chapter 6

An appropriate source for business contacts for game and wildlife management could not be identified. Both the Countryside Alliance Ireland and the British Association of Shooting Clubs in Northern Ireland were contacted for assistance with regard to business/member contact details, but unfortunately due to confidentiality rules a contact list could not be obtained.

The questionnaire collected quantitative data in the main, supplemented by some open response questions that were coded post-interview; this type of data enabled the use of SPSS software (Statistical Package for the Social Sciences) to conduct the data analysis.

Sampling Approach

Prior to data collection, a sample frame was developed to ensure that the target samples by industry were both representative and realistic. A random stratified sampling technique was utilised to achieve the sample frame. Several of the smaller industries were over-sampled in order to gain greater validity and scope for analysis at that level. Table 1.2 sets out the sample frame for the survey.

As a standard research practice Lantra aims, where feasible, to achieve sample sizes that are within +/- 5% confidence intervals at 95% confidence levels. Confidence intervals are effectively the range in margins of error that are applicable to specific analyses derived from a dataset. This level was achieved in the survey for the following; the environmental and land-based sector overall, the farming cluster level, and the cattle and sheep sub-sector.

Given the size of some of the industries in Northern Ireland achieving robust sample sizes, in accordance with the stated confidence intervals, at industry level was unfeasible. For example, to achieve this at +/- 5% confidence interval for the equine industry would have required 44 of the 50 businesses to complete the interview.

Table 1.2 Survey sample frame

| Farming type | Population (no of businesses) | % of total population | Sample required to achieve +/- 5% confidence interval | Sample targets | Sample achieved | % of total sample |
|---|-------------------------------------|--------------------------|--|-------------------|--------------------|-------------------------|
| Total farming | 25,952 | 87.1% | 379 | 615 | 640 | 64.6% |
| Agricultural cereals & crops | 831 | 2.8% | 263 | 19 | 15 | 1.5% |
| Production horticulture | 297 | 1.0% | 168 | 7 | 10 | 1.0% |
| Pigs & poultry | 586 | 2.0% | 232 | 13 | 19 | 1.9% |
| Dairy | 3457 | 11.6% | 346 | 82 | 94 | 9.5% |
| Cattle & sheep | 18,946 | 63.6% | 377 | 450 | 446 | 45.0% |
| Others | 1,835 | 6.2% | 318 | 44 | 56 | 5.7% |
| Other land management & production | 1,665 | 5.6% | 312 | 193 | 156 | 15.7% |
| Agricultural services | 980 | 3.3% | 276 | 50 | 27 | 2.7% |
| Aquaculture | 25 | 0.1% | 24 | 5 | 11 | 1.1% |
| Trees & Timber | 65 | 0.2% | 56 | 15 | 13 | 1.3% |
| Fencing | 50 | 0.2% | 44 | 15 | 11 | 1.1% |
| Floristry | 250 | 0.8% | 152 | 50 | 47 | 4.7% |
| Land-based Engineering | 295 | 1.0% | 167 | 58 | 47 | 4.7% |
| Animal Health and welfare | 457 | 1.5% | 209 | 97 | 114 | 11.5% |
| Animal Care | 250 | 0.8% | 152 | 50 | 73 | 7.4% |
| Equine | 50 | 0.2% | 44 | 15 | 13 | 1.3% |
| Farriery | 12 | 0.0% | 12 | 3 | 1 | 0.1% |
| Veterinary Nursing and ancillary activities | 145 | 0.5% | 105 | 29 | 27 | 2.7% |
| Environmental Industries | 1,725 | 5.8% | 314 | 95 | 81 | 8.2% |
| Environmental conservation | 150 | 0.5% | 108 | 30 | 20 | 2.0% |
| Fisheries management | 25 | 0.1% | 24 | 5 | 2 | 0.2% |
| Game & Wildlife management | 1,300 | 4.4% | 297 | 10 | 7 | 0.7% |
| Horticulture (Amenity), landscaping and sports turf | 250 | 0.8% | 152 | 50 | 52 | 5.2% |
| Environmental and Land-based sector | 29,799 | 100.0% | 379 | 1,000 | 991 | 100.0% |

Weighting

Due to the fact that some industries were over-sampled and others under-sampled, these industries had to be weighted during the analysis stage to achieve sector representativeness. This representative weight essentially re-distributed the number of businesses in each industry across the total 991 businesses surveyed. This weighting was done separately for farm businesses using the DARD proportions by farm types (this took into account the type, size and number of farm businesses), and for the other industries, which only took into account the number of businesses according to Lantra's own industry estimates.

Table 1.3 Example of weighting process

| Industry | Sample size | Population | Population proportion* | Sample proportion* | Weighting factor (population/sample)* |
|-------------------------------------|-------------|------------|------------------------|--------------------|---------------------------------------|
| Fencing | 11 | 50 | 0.002 | 0.011 | 0.151 |
| Environmental and land-based sector | 991 | 29,799 | | | |

* All figures rounded to 3 decimal places

A grossing weight was also calculated. The representative numbers/proportions of businesses in the 991 sample were grossed-up/extrapolated to provide estimates of the total business population sizes (hence some of the data tables throughout the report will display the grossed-up/extrapolated figures). It should be noted that although the gross weights provide extrapolated figures, the percentages remain constant. Again these calculations were performed separately for both farm businesses and non-farm businesses due to the difference in available background information.

Employment weights were also calculated for those questions and/or variables referring to the employees themselves. This was calculated using employment proportions based on the DARD farming data and estimates Lantra had for the industry employment totals. Data referring to employment variables should be treated with additional caution as the survey was of employers *not* employees.

Working owner weights were also calculated as these referred to a separate population to the employment totals; working owner data were only calculated for the farm businesses for which Lantra had population estimates in the DARD data sources.

Analysis

Agriculture is the most predominant part of the sector in Northern Ireland in terms of size. For this reason, it is important that the data analysis for agriculture was carried out separately (in addition to an all-sector analysis in Northern Ireland) so as to provide a clear picture of the agricultural industry (farming) as a whole. Therefore much of the data derived from the Lantra/DARD survey 2009 has been analysed by industry. For the purpose of this research, a proportion of production horticulture (the growing of fruit and vegetables) has been included within the farming cluster.

1.4 Structure of this report

The report is structured around seven main chapters:

- Chapter 2 draws on evidence from official statistics and other sources to outline the size and structure of the sector, providing information on the employment and business numbers by industry
- Chapter 3 looks at the characteristics of the workforce
- Chapter 4 outlines evidence from business surveys related to skills needs and challenges
- Chapter 5 reviews current education, skills and training practices by businesses and their attitudes to recruiting individuals from the education system
- The next two chapters focus on the future. Chapter 6 provides qualitative evidence on the variety of drivers, which are causing change in the sector. Chapter 7 provides quantitative evidence of what this might mean to future employment
- Chapter 8 summarises the key findings from the Lantra/DARD survey for each industry within the environmental and land-based sector
- The final chapter provides key findings and makes recommendations for the Environmental and Land-based Sector in Northern Ireland

2. Size and Structure of the Sector

Chapter Summary

- The environmental and land-based sector is complex and diverse, covering 17 industries across Northern Ireland
- Lantra estimates there are over 20,000 businesses and 63,000 people employed within the sector in Northern Ireland^a
- The sector is more significant in Northern Ireland than elsewhere in the UK. There are 25,264 farm holdings across Northern Ireland, with cattle and sheep farms dominating this total^b. When other environmental and land-based industries are included, almost 1 in every 4 businesses in Northern Ireland is in the sector^c
- The sector is dominated by micro-businesses and *very small* farms. Very small farms account for 77% of all farms. Micro-businesses, employing fewer than 10 staff, account for 98% of all businesses^d

The environmental and land-based sector is complex and diverse, covering a range of industries across Northern Ireland. Businesses in the environmental and land-based sector supply quality-assured food, ensure the health and welfare of animals, and enrich the natural environment. Agriculture is also significant as approximately 80% of the total Northern Ireland land area of 1.4 million hectares is in agricultural use⁴⁴.

The sector is also important in terms of the management of green spaces in urban and rural areas, the economic benefits, which extend beyond direct employment with evidence suggesting they add value for tourism, recreation, culture and health to the tune of over £7.6 billion a year across the UK⁴⁵. In Northern Ireland, activities, which involve managing the environment support over 32,000 full time equivalent jobs with a value of £573 million⁴⁶. Some studies highlight more wide-ranging benefits from managing green space, such as improving people's wellbeing by reducing anxiety in the population⁴⁷.

a Lantra (2009) A Skills Assessment for the Environmental and Land-based Sector, Northern Ireland Factsheet

b Department of Agriculture and Rural Development (2009), The Agricultural Census in Northern Ireland

c ONS Inter Departmental Business Register (IDBR) (2008), and other source for some industries (see Annex D for details)

d ONS Inter Departmental Business Register (IDBR) (2008)

44 Department for Agriculture and Rural Development (2007), Rural Strategy 2007-2013

<http://www.dardni.gov.uk/dard-rural-strategy.doc>

45 Economics and Funding SIG (2007), Valuing the Benefits of Bio-diversity

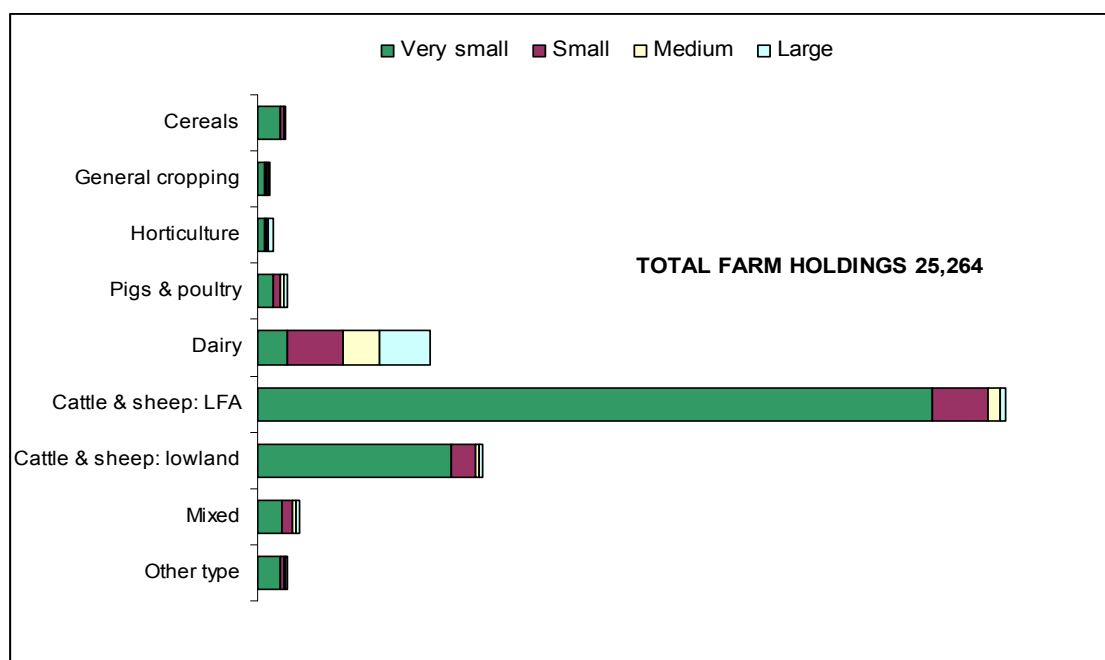
46 GHK (2007), The Environmental Economy of Northern Ireland

47 Commission for Architecture and the Built Environment (2009), Grey to Green

2.1 Farms, Businesses and Employment Numbers

Data on the number of farm holdings are available through the annual Agricultural Census conducted by DARD. Data from 2009 shows there were 25,264 farm holdings in Northern Ireland⁴⁸. The graph below provides a breakdown of farm holdings by their size and type.

Figure 2.1 Farm holdings by farm type and farm size (2009)



Source: Agricultural Census in Northern Ireland, June 2009

Note: Very Small = Less than 1 Standard Labour Unit, Small 1 < 2, Medium 2 < 3, Large 3 or more

LFA = Less Favoured Area

Agriculture in Northern Ireland is an industry of declining farm numbers, dominated by older farmers, with small farm businesses and low returns from agricultural activities. Over the last 20+ years there has been significant restructuring of farm businesses, with a 26% decline in the overall number of active farm holdings⁴⁹ and a significant growth in the size of the average farm business. Cattle and sheep farms within Less Favoured Areas (LFA) and lowland areas comprise 75% of all farms. Very small holdings account for 76% of all holdings. Very small holdings have a Standard Labour Requirement of less than one. This is to say that the crop area and/or livestock numbers within the holding would not be expected to support someone in a full-time job.

48 Department of Agriculture and Rural Development (2009), The Agricultural Census in Northern Ireland

49 Department of Agriculture and Rural Development (2009), The Agricultural Census in Northern Ireland

Around 1 in 10 farms (9%) in Northern Ireland have diversified from their mainstream farming activities⁵⁰, with this figure rising to 12% in the medium/large holdings. The level of diversification is slightly lower than the EU (27)⁵¹ average of 10% but much lower than the 23% average across the UK as a whole⁵².

In Northern Ireland agricultural contracting or haulage (3%) is the most popular type of diversification. As this involves payments being made from one farmer to another it does not represent diversification for the industry as a whole. Diversification completely outside of agriculture into areas such as tourism (1%), direct sales (1%) and food processing (<0.5%) is low.

The definition of a “farm”⁵³ used in the agricultural census is based on any single unit, both technically and economically, which has a single management and produces agricultural crops. This definition is slightly different to the definition of a *business unit*, which is used across all sectors of the economy. The Inter Departmental Business Register (IDBR)⁵⁴ draws on the Agricultural Census and administrative data relating to VAT, PAYE and registrations at Companies House. This source allows the size of non-farm based industries to be investigated. There are a lower number of agriculture-related businesses than farms because not all farm holdings are registered for PAYE, VAT or at Companies House. In addition, the IDBR only records businesses against their main activity, so some part-time farms may be excluded.

Looking at the number of business units in the environmental and land-based sector indicates that it is significant in respect of the Northern Ireland economy. There are close to 20,000 businesses across the sector⁵⁵, comprising 23% of all businesses across Northern Ireland⁵⁶. This is a higher percentage than in any other UK nation, with the comparable figures being Wales 16%, Scotland 13% and England 7%.

50 Department of Agriculture and Rural Development (2007), EU Farm Structure Survey

51 EU (27) refers to the definition of the European Union based on 27 member states

52 EU Farm Structure Survey 2007, in Eurostat Agricultural Statistics Database

53 See <http://www.dardni.gov.uk/index/dard-statistics/statistical-reports/agricultural-census.htm>

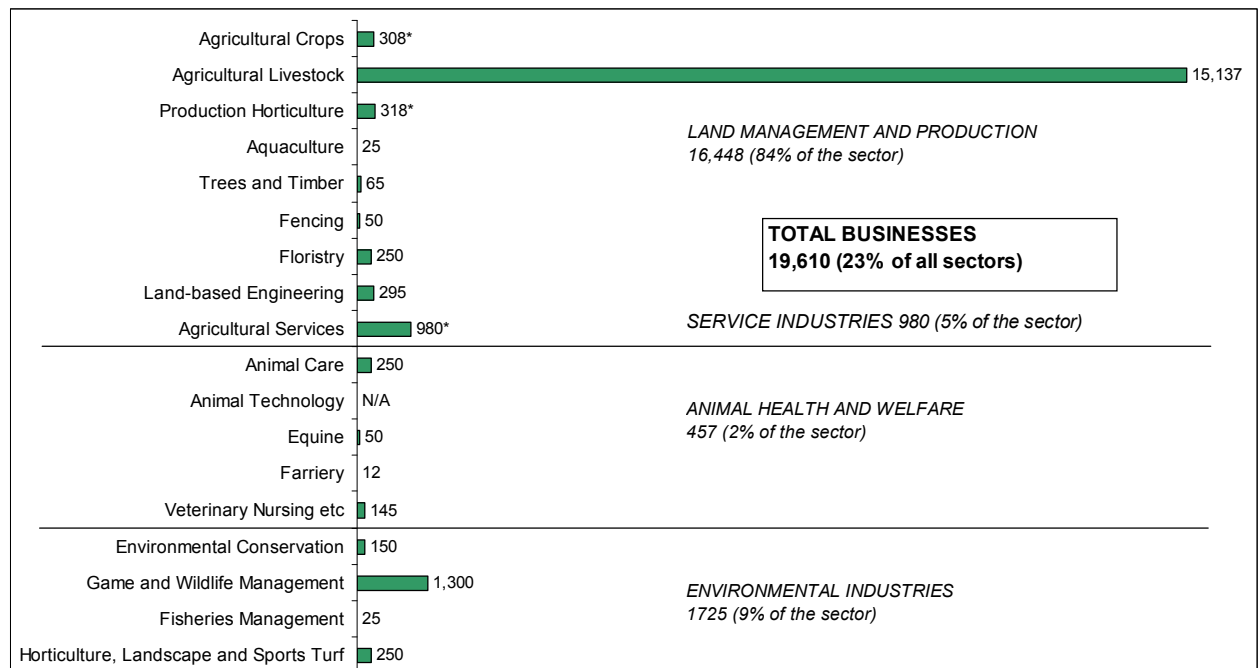
54 Office of National Statistics (2008), Inter-Department Business Register in UK Business: Activity, Size and Location

55 ONS (2008), Inter-Department Business Register and other source for some industries (see Annex C)

56 Office of National Statistics (2008), IDBR Register in UK Business: Activity, Size and Location

Figure 2.2 shows the distribution of businesses by industry. In terms of size, the sector is dominated by the agricultural livestock industry, which accounts for 77% of businesses in the sector. This contributes to the group of industries within the Land Management and Production cluster covering 84% of the sectors. Industries within Animal Health and Welfare account for just 2% and Environmental Industries cover 9%. The remaining 5% of businesses provide services to agriculture, such as agricultural contracting.

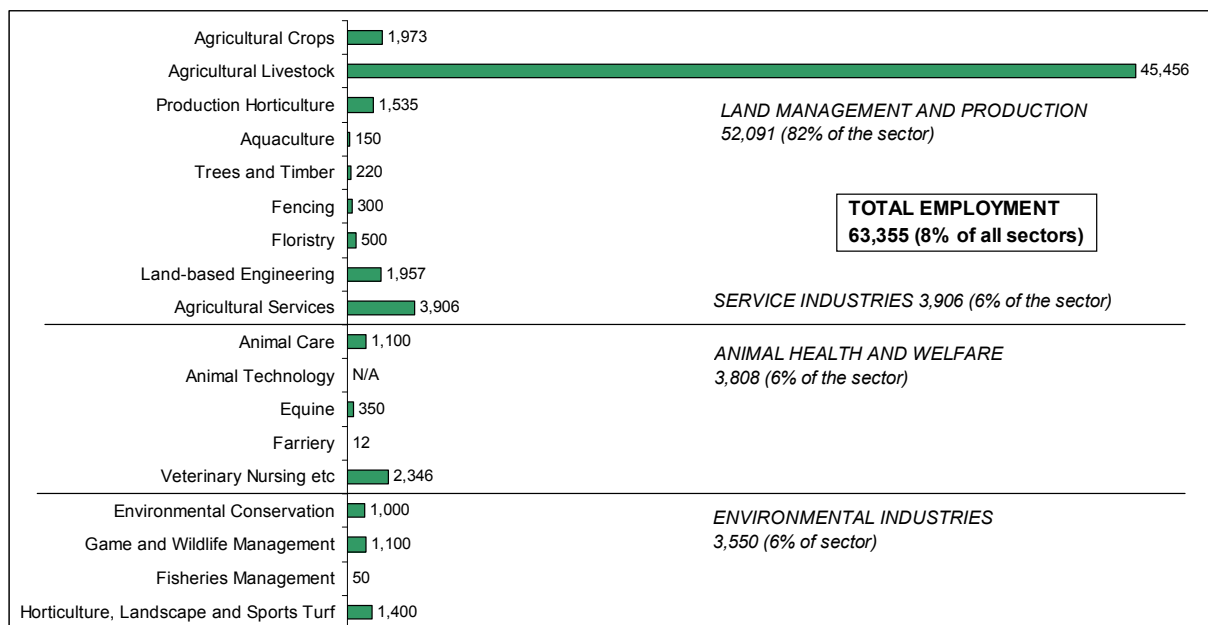
Figure 2.2 Businesses by industry (2008)



Source: ONS Inter Departmental Business Register 2008 (IDBR) and other source for some industries (see Appendix B for details). *Figures differ from the number of farm holdings, and are for local business units.

Figure 2.3 presents the numbers of people employed by industry. There are close to 64,000 people employed within the sector and in “environmental and land-based” jobs in other sectors⁵⁷. This equates to 6% of all employment across Northern Ireland (compared to 4% across the UK). Volunteers are particularly important for industries such as animal care⁵⁸ and environmental conservation (44% of Northern Ireland businesses employ volunteers) although they are not included in national employment statistics⁵⁹.

Figure 2.3 Employment by industry (2008)



Source: Office of National Statistics, Labour Force Survey 2008. Other sources such as the DARD Agricultural Census have been used for some industries (see Appendix B for details).

⁵⁷ ONS (2008), Inter-Department Business Register and other source for some industries (see Annex C for details)

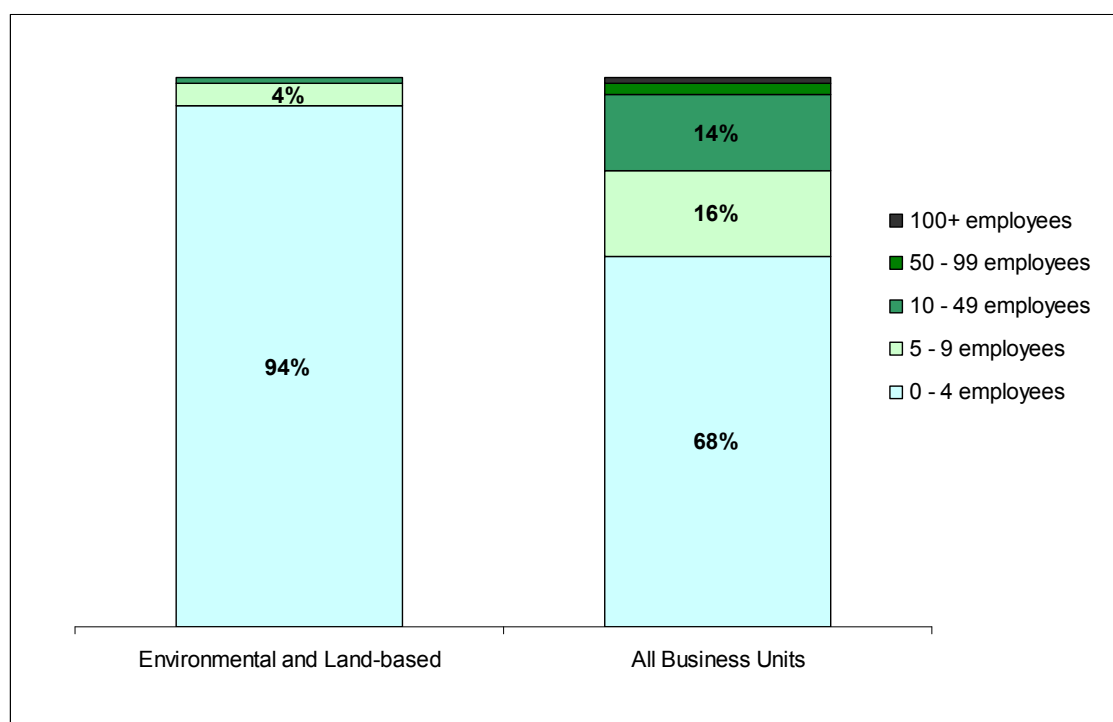
⁵⁸ Lantra (2008), Volunteer Skills Research

⁵⁹ Lantra (2009), Northern Ireland Environmental Conservation Benchmarking Survey (funded by Department for Employment and Learning)

2.2 Business Characteristics

Micro-businesses pre-dominate across the sector in Northern Ireland, with 98% of the businesses within the sector employing less than ten people⁶⁰. Linked to this, self-employment is a key feature of the workforce. Of the total workforce, approximately 52% are self-employed⁶¹. With the sector in Northern Ireland dominated by agricultural livestock businesses (as outlined in Figure 2.4), these findings are not surprising given the structure of the livestock industry. The Lantra/DARD 2009 survey has found that 97.7% of businesses in the sector employ fewer than 10 people, with 76.4% of farm businesses employing fewer than 3 people.

Figure 2.4 Businesses by size (2008)



Source: ONS Inter Departmental Business Register 2008 (IDBR)

2.3 Key Considerations

This study highlights the fact that official statistics (IDBR, LFS) underestimate the number of businesses and the corresponding workforce. The need for accurate data about the sector is vital in the assessment and impact on the types of skills and learning opportunities businesses need. For example, we might expect there to be a high demand for people and business management skills due to the dominance of micro-businesses and the high levels of self-employment. Skills issues and challenges are discussed further in Chapter 4.

⁶⁰ ONS (2008), Inter-Department Business Register and other sources for some industries (see Annex D for details)

⁶¹ Lantra/DARD (2009), Environmental and land-based sector business survey

3.0 Workforce Characteristics

Chapter Summary

- Working owners form a significant proportion of the environmental and land-based sector's workforce. Within Northern Ireland they account for 52% of those employed in the sector. Within farming, working owners form an even higher proportion of the workforce, accounting for two thirds (66%) of those employed^a
- There is an ageing profile of the workforce as a whole, and for working owners in particular. In farming over a quarter of working owners are 65 years of age or older^a
- Qualification attainment in the workforce is generally low. 38% of the workforce do not hold any recognised qualifications^a
- The workforce is segmented along gender lines by industry. Farming, environmental industries and other land management and production industries are male dominated. By contrast, animal health and welfare industries are female dominated^a

This chapter provides an analysis of the environmental and land-based workforce in Northern Ireland. It looks at the structure of the workforce by working status, gender and age based on the evidence unless stated otherwise drawn from the Lantra/ DARD survey of businesses conducted between November 2009 and January 2010. The methodology of this survey is discussed in Chapter 1.

^a Lantra/ DARD (2009), Survey of environmental and land-based businesses

3.1 Working Status

Figure 3.1 shows the breakdown of the workforce (which includes working owners and employees) by their employment status. The proportion of the workforce who work full-time, part-time and within temporary seasonal roles is shown below.

Figure 3.1 Workforce by employment status

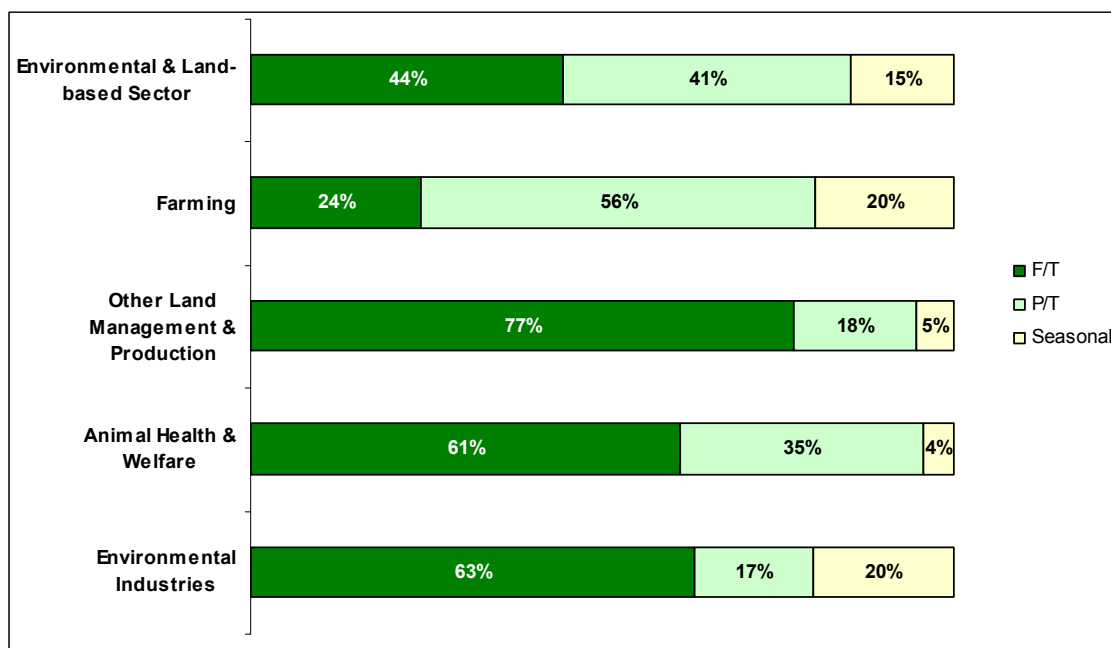


Figure derived from weighted data, sample base = 991

Across the environmental and land-based sector as a whole, only 44% of the workforce work on a full-time basis, which compares to 78% across all sectors in Northern Ireland⁶³.

There is a high level of part-time (less than 30 hours a week) and seasonal working (less than 20 weeks a year) within the sector. Part-time working is particularly high within farming (56%). Secondary research indicates that many farm owners below retirement age are disinclined to quit farming and continue working part-time on the farm and engage in other part-time off-farm employment⁶⁴ to supplement their income.

This finding reveals a higher level of part-time farming than the DARD agricultural census where 45% of the farming workforce is recorded as working part-time⁶⁵. In contrast, the “other” land management and production workforce is largely full-time (77%).

63 Office of National Statistics (2008), Labour Force Survey

64 <http://ageconsearch.umn.edu/bitstream/52835/2/058.pdf>

65 Department of Agriculture and Rural Development (2009), Agricultural Census

Figure 3.2 Proportion of working owners against employees by industry cluster

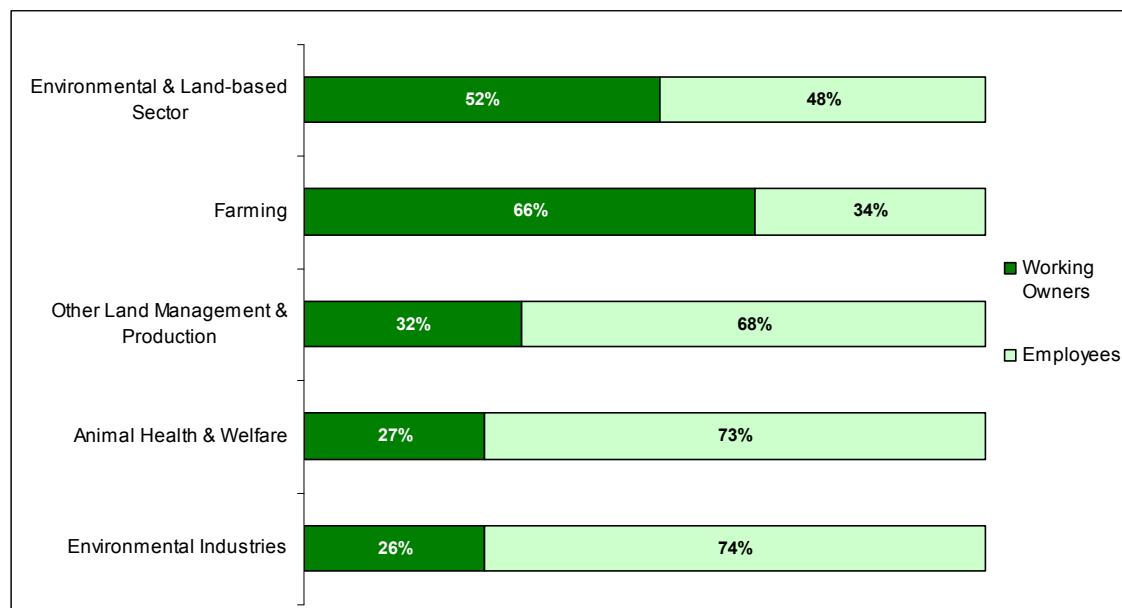


Figure derived from weighted data, sample base = 991

Self-employment is a key feature of the sector's workforce, particularly within farming where many are working owners. The Lantra/DARD business survey included questions to quantify working owners (i.e. those self employed) as well as employees.

As shown in Figure 3.2, over half of the workforce (52%) are working owners. The proportion of working owners is lowest within environmental industries where 26% of the workforce are working owners. Even this is high in comparison to Northern Ireland's workforce as a whole, where 15% of the workforce are self-employed⁶⁶.

3.2 Migrant Workers

The Lantra/DARD Northern Ireland survey of businesses in 2005 found that migrant workers made up 4.4% of the workforce. The Lantra/DARD 2009 survey included questions relating to the employment of migrant workers (defined as workers from outside the UK or Ireland) and found that only 2% of businesses surveyed had employed migrant workers in the previous 12 months. The survey findings therefore suggest that there has been a reduction in migrant labour since 2005; the proportion of migrant labour in the sector in Northern Ireland now stands at just 3%. The majority of these migrant workers are from Poland.

⁶⁶ Office of National Statistics (2008), Labour Force Survey

Further research by DEL in 2009⁶⁷ highlighted the difficulties in accurately measuring the number of migrant workers in Northern Ireland. Based on a business survey and synthesis of available sources, the research estimates that between 33,000 and 41,000 people born outside the UK and Republic of Ireland were in employment in Northern Ireland in 2008 (representing between 4-5% of the Northern Ireland workforce). The research found that migrant workers formed a similar proportion of workers in agriculture where they accounted for 4% of the sector's workforce, up from 1% in 2001. The DEL research also highlighted that the recession is likely to have reduced the total number of migrant workers in both Northern Ireland and other parts of the UK. In fact, the Lantra/DARD 2009 survey was conducted when the recession was underway, and provides evidence that the use of migrant workers has declined since the DEL research was undertaken.

Robust analysis of the results from the Lantra/DARD 2009 survey at an industry level is not possible due to the low number of responding businesses who had employed migrants. The survey suggests that the use of migrant labour is highest within farming industries; Table 3.1 shows results by farm type.

Table 3.1 Employment of migrant workers within farming

| Farm type | % of businesses that have employed a migrant in the last 12 months | Migrants as % of workforce # | Sample base |
|-------------------------|---|-------------------------------------|--------------------|
| Cereals & Crops | 7% | 4 | 15 |
| Production Horticulture | 20% | 10 | 10 |
| Pigs & Poultry | 5% | 22 | 19 |
| Dairy | 2% | 1 | 94 |
| Cattle & Sheep | 1% | 1 | 443 |
| Other farming | 2% | 1 | 56 |

Weighted by DARD farms base, # weighted by DARD farm employment base
Sample base of 640 farm businesses. Results in italics should be treated with caution

Production horticulture farms are much more likely to employ migrant workers than other farm types, with 1 in 5 (20%) employing migrant workers in the past 12 months. Within production horticulture, evidence from the survey suggests that around 10% of the workforce are migrant workers. The findings are somewhat similar to those from the Lantra/DARD survey undertaken in 2005 in that the highest proportion of migrant workers were found within production horticulture. However, since 2005 the proportion of the migrant workforce within production horticulture appears to have decreased quite significantly. In 2005 migrant workers accounted for almost half (47.5%) of the casual and seasonal workforce, furthermore 46.2% of the entire production horticulture workforce were surveyed. The use of migrant workers also appears to be relatively high in pig and poultry farms, where the survey data suggests 22% of the workforce comprises migrant workers.

⁶⁷ Department of Employment and Learning (2009), The Economic, Labour Market and Skills Impacts of Migrant Workers in Northern Ireland, Oxford Economics

3.3 Gender

Figure 3.3 below shows the proportion of the workforce who are male and female. The sector as a whole is male dominated, with men accounting for close to three quarters (73%) of the workforce. This is significantly higher than the average for those employed across all sectors, which stands at 54%. The animal health and welfare cluster differs from other parts of the sector with two thirds (67%) of employees female.

Figure 3.3 Workforce by gender and industry cluster

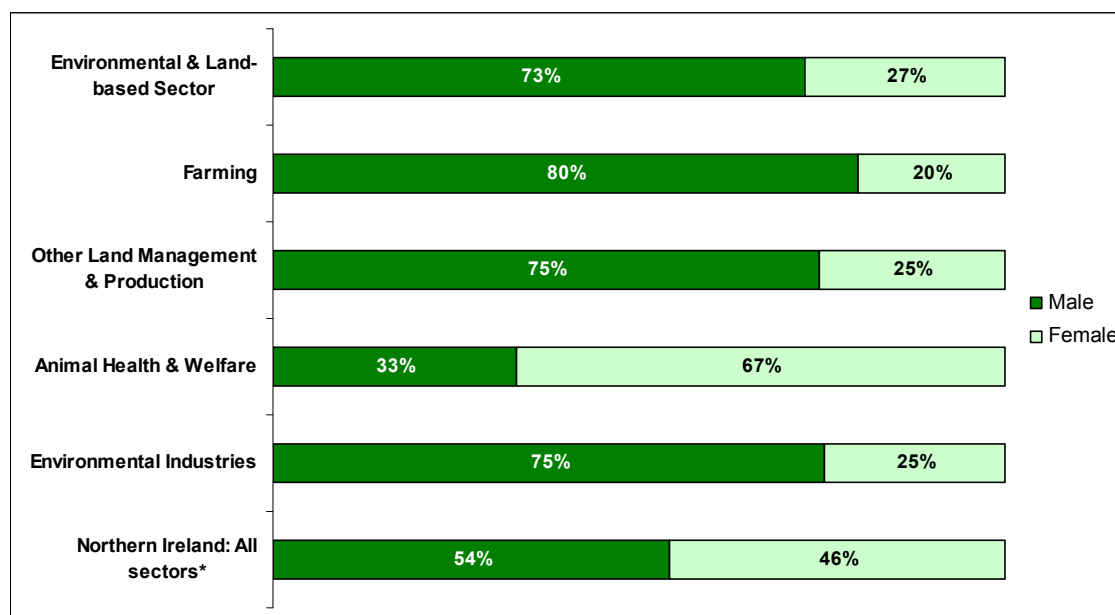


Figure derived from weighted data

* Data source is ONS, Labour Force Survey 2008

The findings show that farming is more male dominated than other parts of the sector, with men accounting for 80% of the workforce. The findings here are in line with the DARD Agricultural Census. Direct comparison from the LFS data is not possible, as although the census reports on the gender of farmers and farm workers, it does not provide a gender breakdown for farmer's spouses. However, if we assume that 92% of farmer's spouses are female (given 92% of farmers are male) the census would show 80% of the farming workforce as male⁶⁸.

⁶⁸ Derived from Department of Agriculture and Rural Development (2009), Agricultural Census

Table 3.2 Enrolments in the Northern Ireland further education sector by gender 2008/09

| Subject Area | DEL | | CAFRE | |
|--------------------------------------|----------|--------|----------|--------|
| | Female % | Male % | Female % | Male % |
| Farming | 36.5 | 63.5 | 8.7 | 91.3 |
| Other Land Management and Production | 62.4 | 37.6 | 28.7 | 71.3 |
| Animal Health and Welfare | 79.3 | 20.7 | 84.0 | 15.6 |
| Environmental Industries | 58.6 | 41.4 | 22.8 | 77.2 |
| Environmental and Land-based sector | 62.5 | 37.5 | 30.9 | 69.1 |

It is interesting to note that this trend in a male dominated workforce is set to continue, if it is assumed that existing learners will enter the workforce on completion of their studies. By way of illustration, when enrolments on sector-based provision in further education are looked at (as in the table above), farming and other land management and production learners are predominantly male. Only in animal health and welfare is there a distinct swing to a predominantly female cohort of learners.

3.4 Age

The Lantra/DARD survey also included questions related to the age of employees and working owners. Respondents to the survey were asked to identify the number of staff, and working owners, within a number of age bands. The aggregated results are shown in Figure 3.4.

Figure 3.4 Workforce by age band and industry cluster

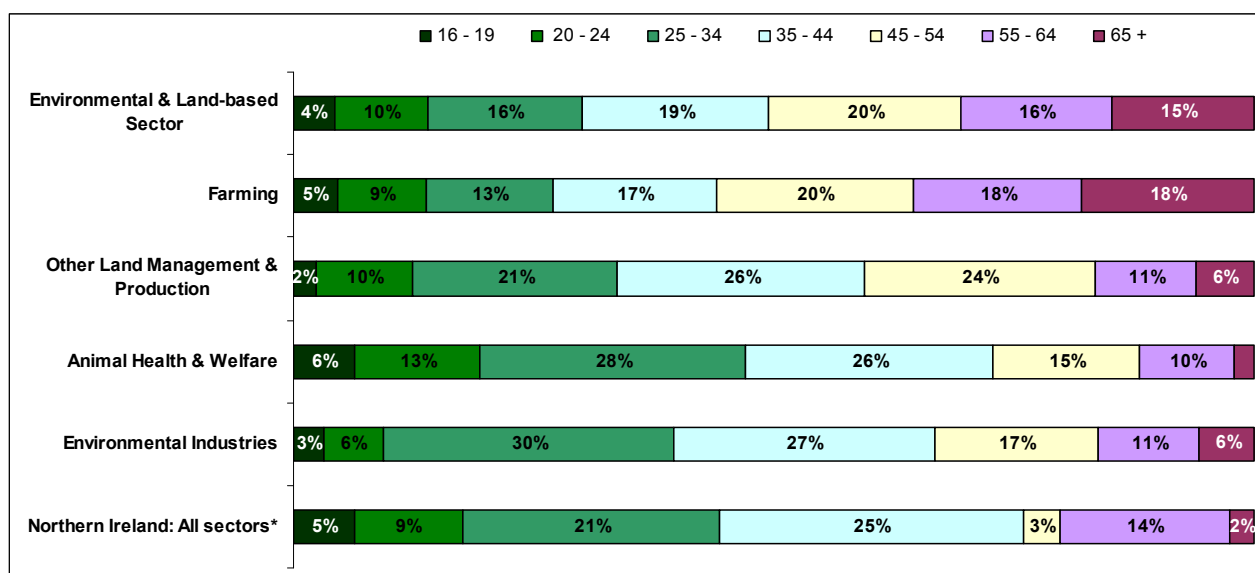


Figure derived from weighted data

* Data source is ONS, Labour Force Survey 2008

The sector as a whole, and farming in particular, has an older age profile than is the case across Northern Ireland's workforce as a whole. Within farming 18% of the workforce are 65 and over, compared to a 2% average across all sectors of the Northern Ireland economy.

Looking more closely at industry level data, the industries that reported a significant proportion of workers over 55 years are fisheries management (40.0%), agricultural livestock farms, which includes pigs, poultry, dairy, cattle and sheep (37.1%), aquaculture (33.3%), and "other" agricultural businesses (33.3%).

In contrast, those businesses within the agricultural cereals and crops industry had the highest percentage of younger staff compared to the other industries. Workers under the age of 24 accounted for 27.8% of the workforce.

Table 3.3 shows the age bands of farm working owners. It is clear that working owners have a much older age profile than their workers, with over a quarter (26%) being 65 or older (compared to 3% of workers aged 20-24). Exactly half of all working owners are over 55 years of age. Given this, a significant proportion of the current workforce will leave the sector through retirement over the next ten years. This will create a high replacement demand, which is discussed further in Chapter 7.

Table 3.3 Farming workforce by age band

| Age bands | Working owners (%) | Workers (%) |
|-----------------------------|--------------------|-------------|
| 16 – 19 | * | 14 |
| 20 – 24 | 3 | 22 |
| 25 – 34 | 7 | 23 |
| 35 – 44 | 15 | 21 |
| 45 – 54 | 26 | 10 |
| 55 – 64 | 24 | 6 |
| 65 + | 26 | 3 |
| Sample base (of businesses) | 640 | 640 |

Figure derived from weighted data * less than 0.5% Note: Figures do not add up to 100 due to rounding.

3.5 Qualifications Attainment – for Working Owners and Employees

The Lantra/DARD survey included questions designed to measure the level of those qualifications held by employees and working owners in the sector. Respondents were asked to specify their highest qualification, and those held by any other working owners. They were then asked to specify the number of their staff who held various qualifications. During analysis the qualifications were grouped into levels as defined by the Qualifications and Credit Framework (QCF). The qualification levels and examples are shown in Table 3.4.

Table 3.4 Qualification levels and examples

| Qualification Level | | Examples |
|---------------------|---|---|
| 4 and above | 8 | Doctorates |
| | 7 | Masters degrees, postgraduate certificates and diplomas |
| | 6 | Bachelor degrees, graduate certificates and diplomas |
| | 5 | Diplomas of higher education and further education, foundation degrees and higher national diplomas |
| | 4 | Certificates of higher education Higher national certificates Higher national diplomas |
| 3 | | A levels NVQs at level 3 (e.g. NVQ in Agriculture / Diploma in work-based agriculture Level 3) Diplomas and extended diploma (e.g. National Diploma in Agriculture) |
| 2 | | GCSEs grades A*-C NVQs at level 2 (e.g. NVQ in Horse Care / Diploma in work-based Horse Care Level 2) Extended certificates and diplomas (e.g. First Certificate in Horse Care) |
| 1 | | GCSEs grades D-G NVQs at level 1 (e.g. NVQ in Animal Care / Diploma in work-based Animal Care Level 1) Certificates and diplomas |

Results from these questions should be treated with a degree of caution as the business owner/manager who completed the interview may not have a perfect knowledge about the qualifications held by all their staff. Official surveys that collect data on qualifications (such as the Labour Force Survey) do so by asking individuals about their own qualification levels rather than asking their employer to provide this.

Figure 3.5 Qualification attainments for employees

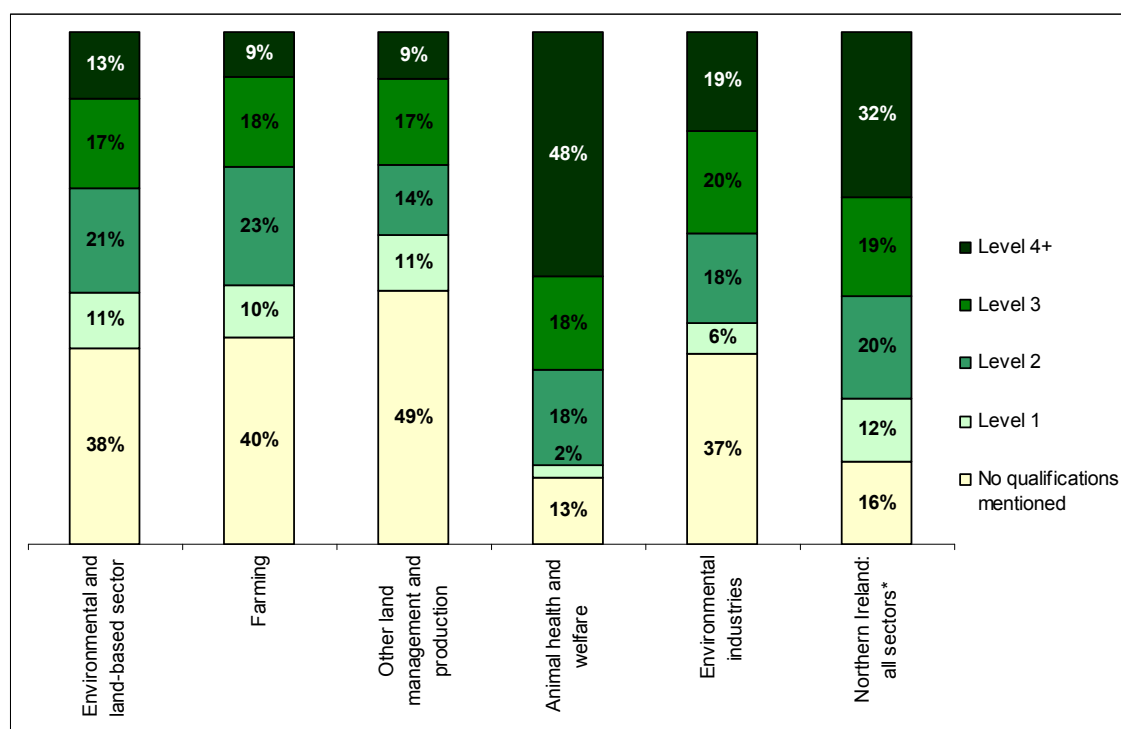


Figure derived from weighted data * Data source is ONS, Labour Force Survey 2008

Figure 3.5 shows that a higher proportion of the sector's workforce do not hold a recognised qualification (38%), compared to the average across all sectors in Northern Ireland (16%). Those working in farming and other land management and production industries are most likely not to hold formal qualifications (40% and 49% respectively).

The animal health and welfare industries have the largest proportion of qualified workers; almost half of those employed are qualified to level 4 or above. The high levels of qualifications within the animal health and welfare cluster may largely be linked to the regulations and requirements within the veterinary nursing and ancillary activities industry (e.g. for veterinary nurses and para-professionals).

Figure 3.6 moves on to look at the highest qualification level held of any of the working owners within each business. Generally speaking working owners are less well qualified than the rest of the workforce. Across the sector, almost three fifths (58%) of working owners do not hold any formal qualifications compared to only 16% across all sectors in Northern Ireland. This figure rises to 62% within the farming cluster of industries. The focus groups highlighted that many farmers believe that formal qualifications are unnecessary. A number of the participants in this research stated, “*I don’t think it’s necessary to the farming industry*”. Others said, “*I don’t have any qualifications, not even a GCSE, and I think I’m well capable of running a farm*”. Similarly others expressed the view, “*Paper is no good to you; it’s the way you do it.*”

The most qualified working owners sit within the animal health and welfare and environmental industries; within each cluster 37% of owners are qualified to level 4 or above.

Figure 3.6 Highest qualification levels of working owners

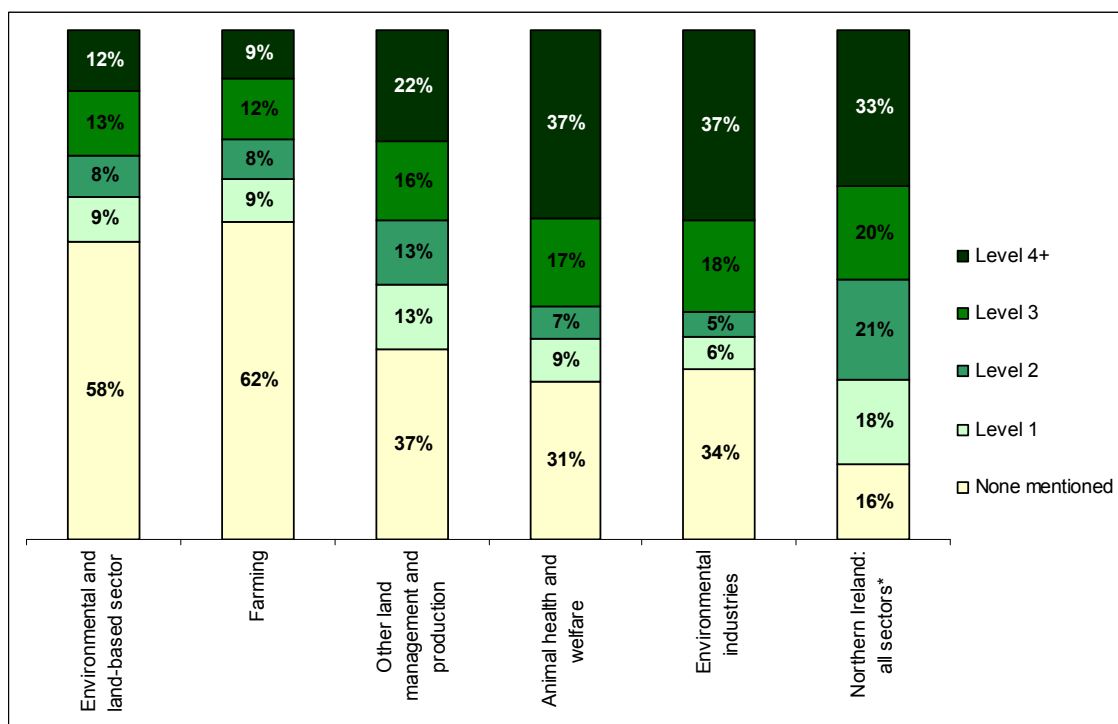


Figure derived from weighted data

Excludes *refused*, *don’t know* and *other* responses (unweighted base size: 898 businesses)

*data source is ONS, Labour Force Survey 2008

Looking more closely at the qualifications of working owners within farming (Figure 3.7), production horticulture has the highest percentage of working owners with no formal qualifications (78%). In contrast, the farm type with the highest proportion of qualified working owners is cereals and crops (45% hold qualifications at level 1, 2 or 3). Although cereals and crops farms have the highest proportion of qualified working owners, the working owners of pig and poultry farms hold the highest level of qualifications compared to the farming sector as a whole; almost one fifth (17%) are qualified to level 4 or above.

Figure 3.7 Highest qualification levels of working owners (within farming)

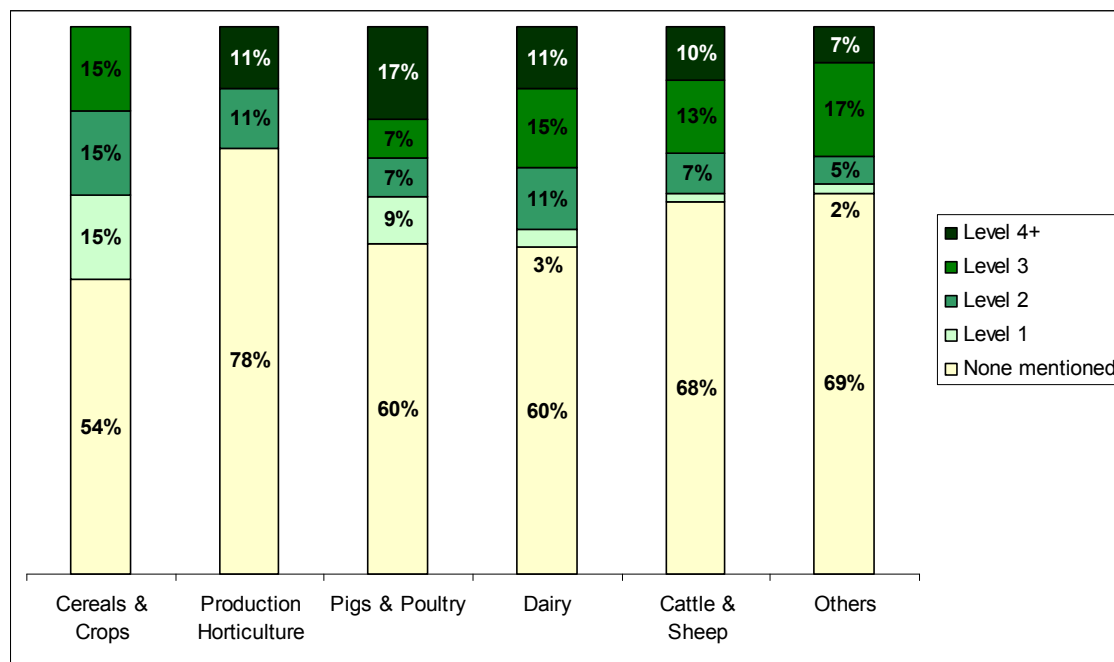


Figure derived from weighted data

Excludes *refused*, *don't know* and *other* responses (unweighted base size: 590 farms)

The remainder of this section explores the data in more detail to identify whether there are any relationships between the educational attainment of working owners with their age, the size of their business and their turnover. As farms make up the majority of the sector in Northern Ireland (and accounted for 64% of the sample of businesses surveyed), the data has been explored, where possible, for farming alone, in addition to an all-sector and/or industry cluster analysis.

The relationship between qualification attainment and the age of the working owner was explored (Figure 3.8 over the page). No formal qualifications were held by any of the working owners between 16 and 19 years of age. The age band of working owners that held the largest proportion of recognised qualifications, as well as the highest level of qualifications were aged between 25 and 34 years. After this age band, the proportion of working owners holding qualifications decreased with age. When the relationship between qualification attainment and age of working owner was explored for farming alone, the same pattern emerged (Figure 3.9 over the page).

Discussions within focus groups highlighted that older farmers in general tend not to undertake training as they do not feel it is necessary, as the following quotes illustrate: *"Farmers learn by doing – experience is worth more than any qualification"* and, *"Well you learn a lot growing up on a farm."* Others reflected that, *"Those from 8-10 years ago need re-skilling but a lot of older farmers are not happy to go."* or *"A lot of the farmers that I know are of a fair age, you are going to have problems getting them to go to Greenmount, or getting them on a course. Now, what was effective, certainly in our area was the local discussion groups, where training was brought to them."*

Figure 3.8 Relationship between qualification attainment and age of working owner across the environmental and land-based sector businesses

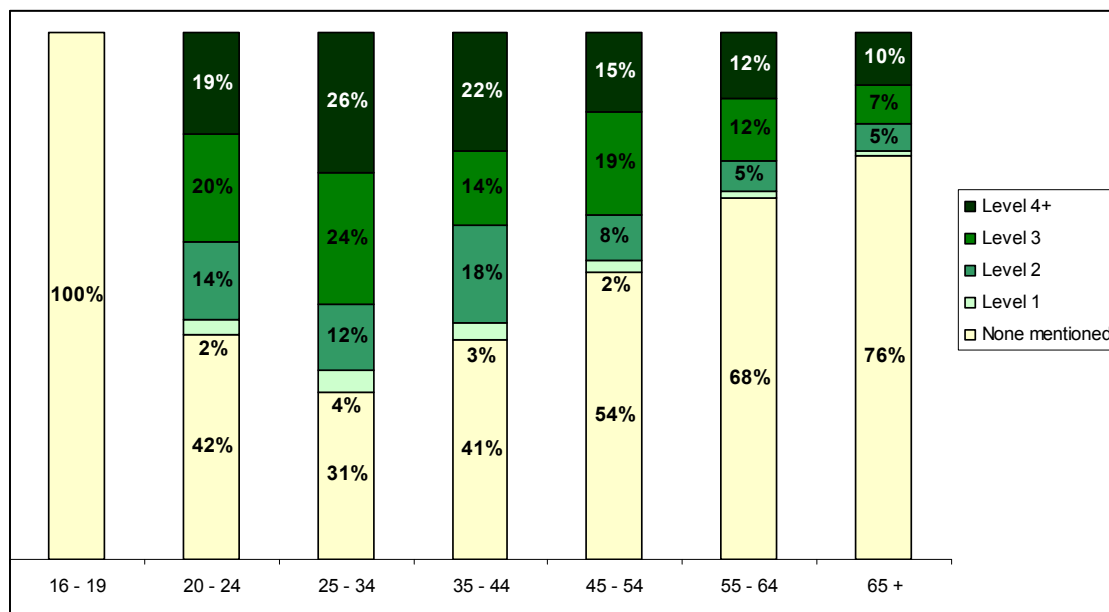


Figure derived from weighted data,
Excludes *refused*, *don't know* and *other* responses (unweighted base size: 898 businesses)

Figure 3.9 Relationship between qualification attainment and age of working owner within farming

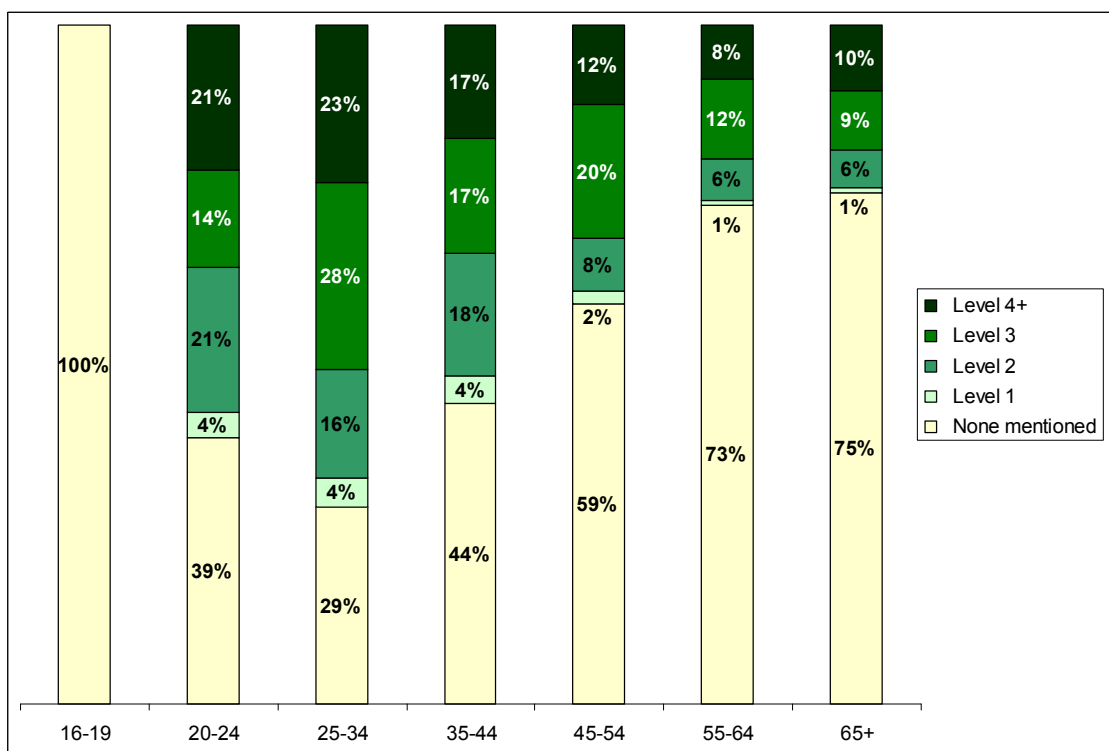


Figure derived from weighted data
Excludes *refused*, *don't know* and *other* responses (unweighted base size: 590 farms)

The relationship between the qualification attainment of working owners and the size of the business was also explored (Figure 3.10). The results clearly show that business owners of larger businesses tend to be more qualified than the working owners of smaller businesses. For example, of those businesses with just 1 or 2 members of staff, only 10.2% of the business owners are qualified to degree level (or equivalent) or above. The percentage of business owners holding the higher qualifications gradually increases with business size. Almost all business owners that employ 50 or more staff in total are qualified to degree level or above (92.6%).

Figure 3.10 Relationship between working owner qualification and business size across the environmental and land-based sector businesses

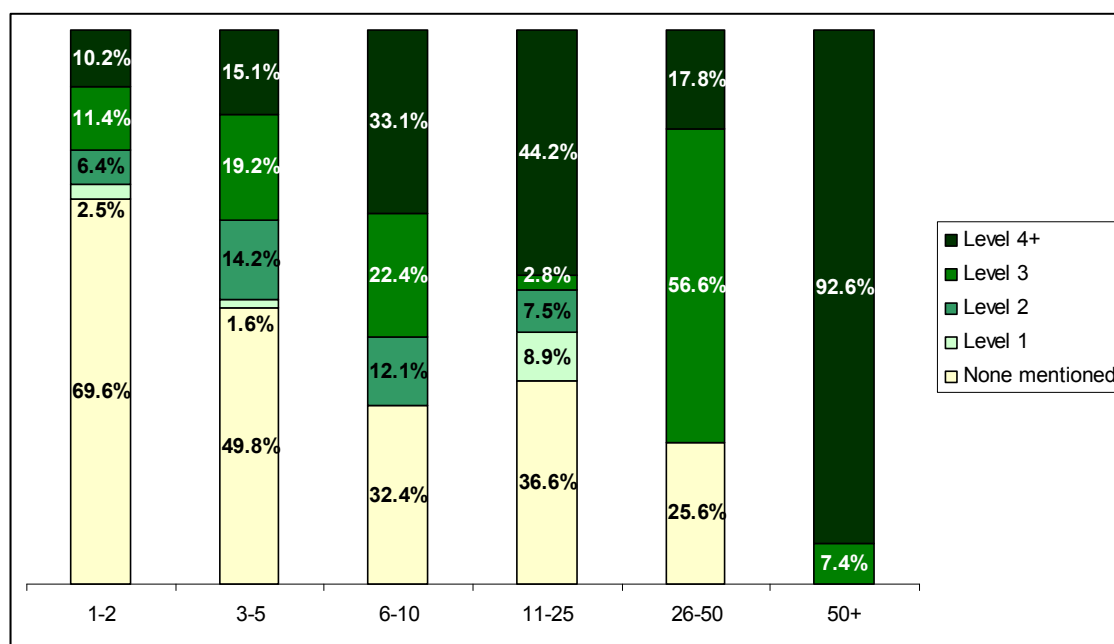


Figure derived from weighted data

Excludes *refused*, *don't know* and *other* responses (unweighted base size: 898 businesses)

As many of the farm businesses in the sector are micro-businesses with either none or very few employees the relationship between the qualification attainments of working owners and small farms has been explored. This relationship was explored firstly by looking at the total number of workers (Figure 3.11 over the page) and also by the DARD farm type definition⁶⁹ (Figure 3.12 over the page).

The relationship has also been explored for non-farm businesses by looking at the total number of workers (Figure 3.13 over the page).

⁶⁹ DARD farm Size Definition: Very Small = Less than 1 Standard Labour Unit, Small 1 < 2, Medium 2 < 3, Large 3 or more

The data for farm businesses alone (Figures 3.11 and 3.12) indicates that as the size of the farm increases, the proportion of working owners holding qualifications and the levels of qualifications held does tend to increase (with the exception of those businesses with 4 members of staff). However, further investigation into qualification attainment and business size would be necessary to validate this emerging pattern. When looking at the data for non-farms (Figure 3.13) a similar pattern is observed although it is not as exaggerated as the farm-only data.

Figure 3.11 Relationship between working owner qualification and business size (within small farm businesses)

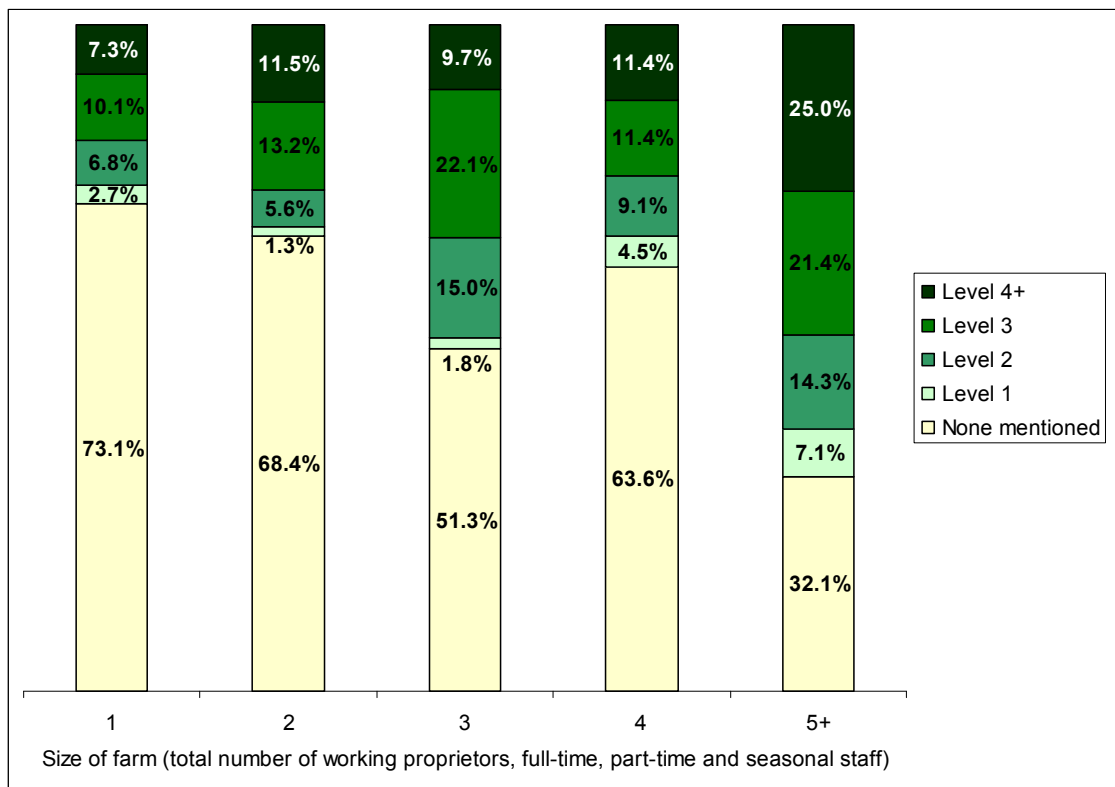


Figure derived from weighted data

Excludes *refused*, *don't know* and *other* responses (unweighted base size: 590 farms)

Figure 3.12 Relationship between working owner qualification and business size (within small farm businesses) using DARD farm size definition*

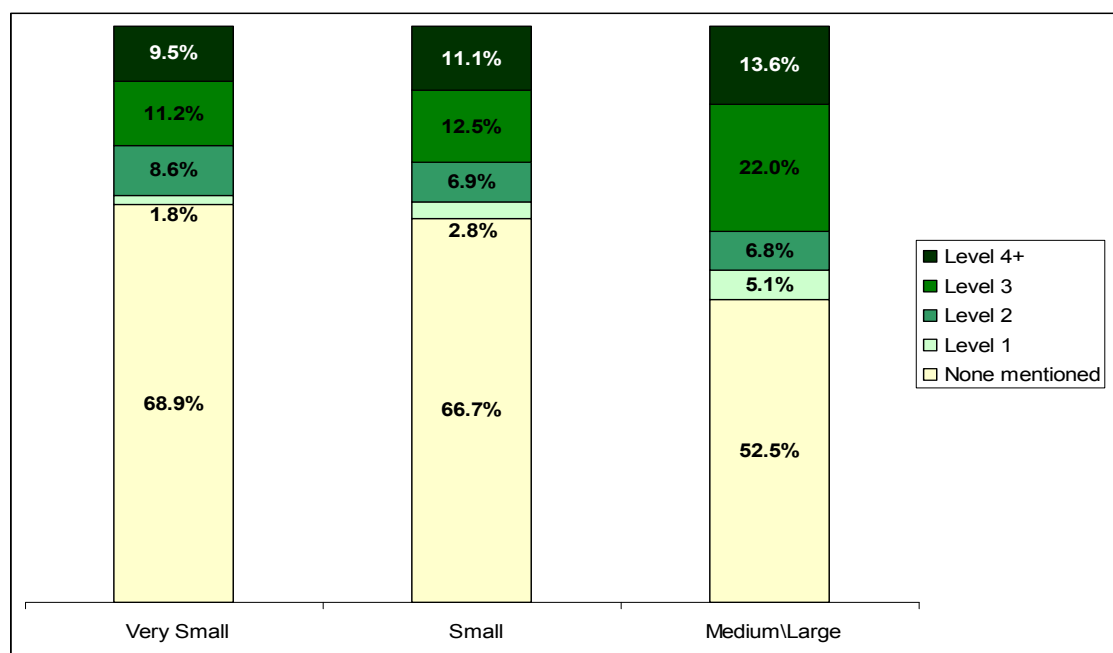


Figure derived from weighted data

Excludes *refused*, *don't know* and *other* responses (unweighted base size: 584 farms)

*DARD farm Size Definition: Very Small = Less than 1 Standard Labour Unit, Small 1 < 2, Medium 2 < 3, Large 3 or more

Figure 3.13 Relationship between working owner qualification and business size (within small non-farm businesses)

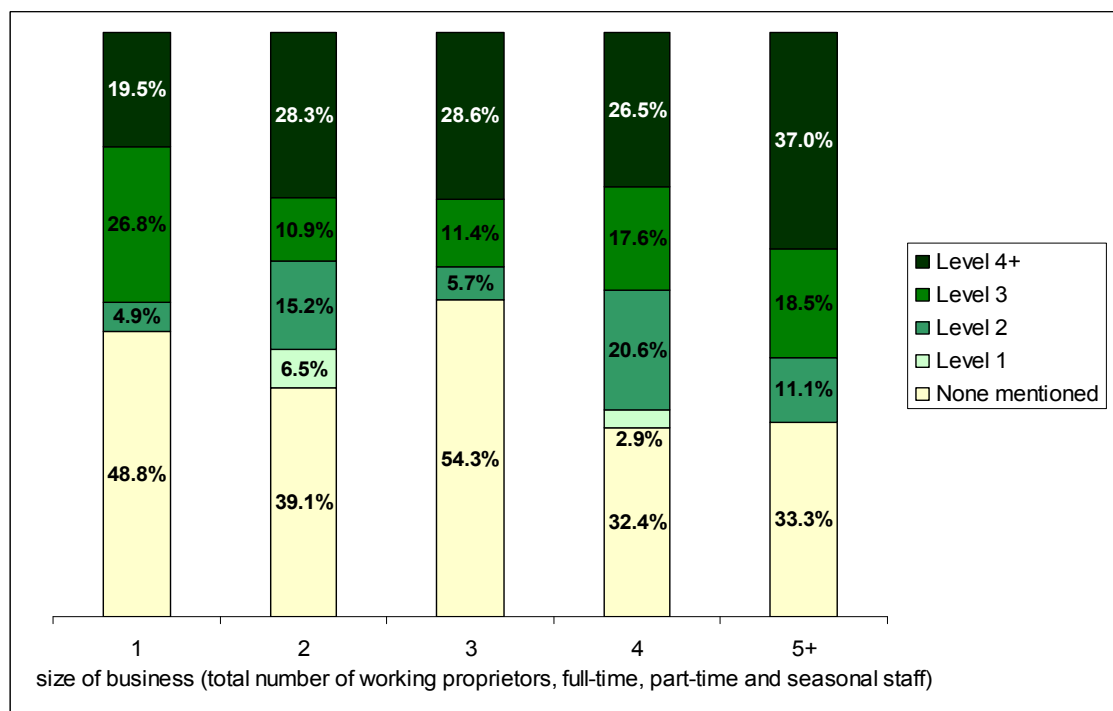


Figure derived from weighted data

Excludes *refused*, *don't know* and *other* responses (unweighted base size: 314 businesses)

The relationship between educational attainment and turnover was explored. (The Lantra/DARD survey asked businesses to provide their turnover, or to provide their budget if the establishment was not a private business). However, it was not possible to undertake an analysis of educational attainment by turnover for farm businesses or for non-farm businesses within the public or voluntary sector due to the small number of respondents.⁷⁰ The data has been analysed for private non-farm businesses (Figure 3.14) but no clear correlation was found.

Figure 3.14 Relationship between qualification attainment of working owner and turnover for private (non-farm) businesses

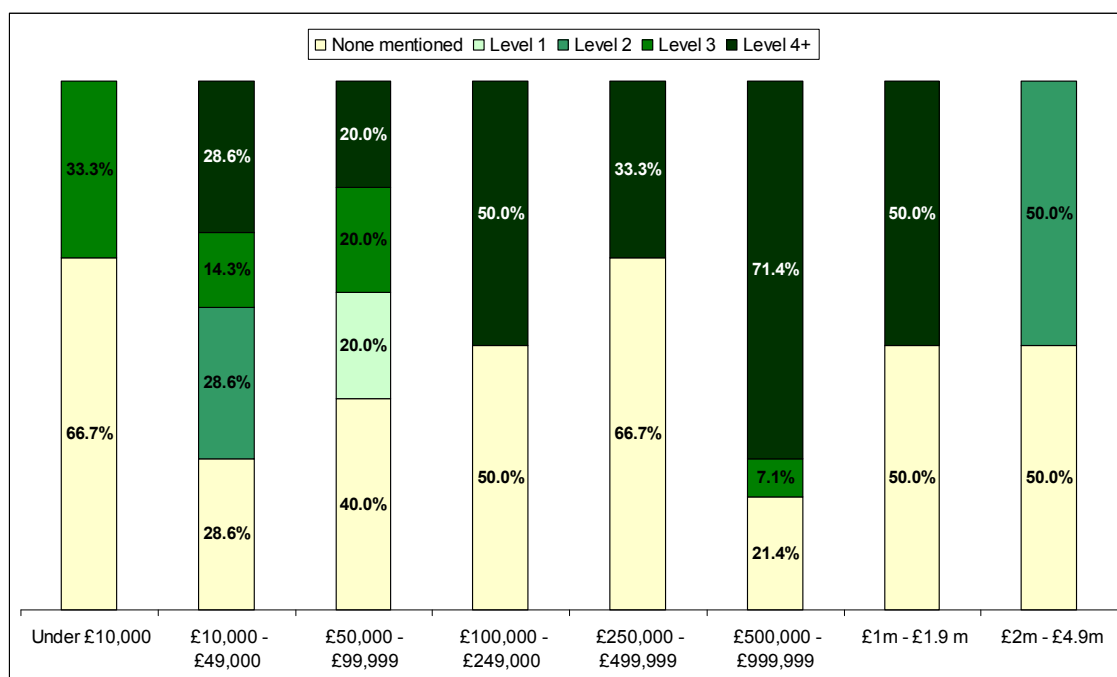


Figure derived from weighted data

Excludes *refused*, *don't know* and *other* responses (for question on qualification attainment)

Excludes *refused*, *don't know* and *in operation less than 12 months* responses (for question on turnover)

(Unweighted base size: 137 businesses)

⁷⁰ Only 4 farm businesses and 22 non-farm public/voluntary sector businesses provided their turnover/budget and stated their highest qualification level

3.6 Occupational Structure

Respondents to the survey were asked to identify the total number of people in their workforce, including themselves, who worked in different occupational areas within their business. Occupations were defined using the Standard Occupational Classification (SOC)⁷¹. Examples of some of the sector specific job roles within each of these broad occupational areas are shown below.

Table 3.5 Occupational areas and example job titles

| SOC Major Group | Example Sector Job Roles |
|--|---|
| Managers and proprietors | Farm manager Conservation manager |
| Professional occupations | Veterinary surgeon |
| Associate professional and technical occupations | Forestry consultant Agronomist Field technician |
| Administrative and secretarial occupations | Administrator Farm secretary |
| Skilled trades occupations | Farmer Stockman Greenkeeper Groundsman Land-based service engineer Florist |
| Personal service occupations | Veterinary nurse |
| Sales and customer service | Shop assistant |
| Transport and machine operative | Forest machine operator Tractor driver |
| Elementary occupations | Field worker Farm worker Seasonal worker |

⁷¹ Office of National Statistics (2000) Standard Occupational Classification

Within small businesses individuals often undertake a variety of different roles from business management to basic farm work. Where interviewees undertook more than one role, the Lantra/DARD survey recorded these individuals against the highest role they undertook. For example, a farm owner who worked on their own would have been recorded in the manager and proprietor occupation. Figure 3.15 shows the structure of the workforce by occupation.

Figure 3.15 Workforce by SOC level

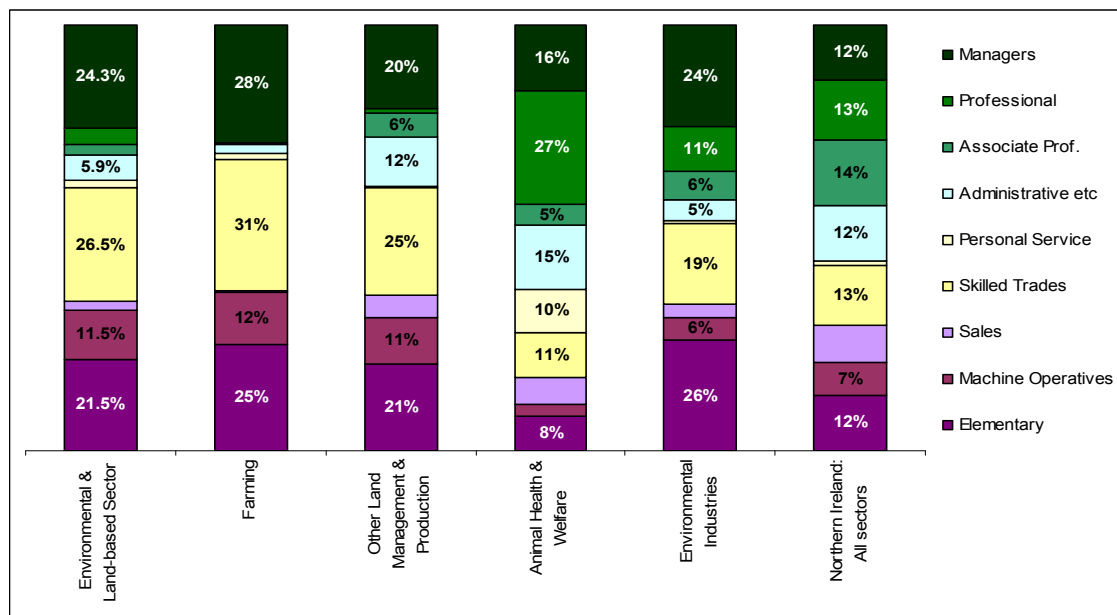


Figure derived from weighted data

Data source: All sectors data is taken from the LFS 2008

The environmental and land-based sector has a high proportion of people working in three main occupational areas:

- Management roles (24.3%)
- Skilled trade roles (26.5%)
- Elementary roles (21.5%)

Given the size of the farming workforce in comparison to other industries in the sector (see Figure 2.3) it is not surprising that the occupational structure of farming is similar to the sector as a whole. However, businesses within animal health and welfare and environmental industries have a more even spread of employment across occupational areas.

3.7 Key Considerations

Working owners pre-dominate the sector. When looking at the age profile and qualification levels of these working owners it may be perceived that the workforce is aging and largely unskilled. Surprisingly, working owners are less qualified than the rest of the workforce, particularly within farming. However, given that the occupational profile establishes that half of the occupations are skilled or managerial positions (51%), it can be assumed that formal qualifications are not perceived by these “older” working owners as necessary to carry out their roles, or to have been seen as necessary to acquire during their working lives. Anecdotal comments from the Lantra/DARD survey and the focus groups underpin this view of qualifications, and the need for them in this sector.

The findings indicate that within small family-run businesses these negative perceptions of qualifications may be passed down to younger family members as all young business owners surveyed (aged 16-19) do not hold any qualifications. As the size of the business increases, working owners generally have more qualifications.

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4.0 Skills Issues

Chapter Summary

- Generic business skills such as planning and organising, information technology skills together with communication and people management are seen to be most lacking in the workforce. Few businesses in farming report a lack of job specific technical skills as a current skills requirement
- In the future different types of skills will become more important. Skills associated with running a business such as marketing and sales, and financial skills such as accounts and record keeping are frequently cited as needed across the sector. The 7% of farms who plan to diversify their business are most likely to identify skills relevant to the chosen area of diversification as requiring development^a
- Skills gaps in the workforce are more of a concern to businesses. When the figures from the survey are extrapolated to be representative of the whole of the sector in Northern Ireland, it is estimated that there are 5,350 people currently working who are not fully proficient in their job roles. This equates to 8% of the workforce, although the density is more concentrated in skilled trade roles^a. A higher proportion of the environmental and land-based workforce has skills gaps in comparison to all sectors in Northern Ireland and in comparison to the sector in England^b
- Recruitment activity in the sector is low and employers who report difficulties recruiting are rare. There is a low level of both hard-to-fill and skills shortage vacancies^a

This chapter outlines evidence from the Lantra/DARD survey related to the current and future skills needs of individuals and businesses. Employer views on future skills requirements and the recognition of knowledge and qualifications are explored, as is the current situation of recruitment for vacancies within the sector.

^a Lantra/ DARD (2009) Survey of environmental and land-based businesses

^b IFF Research (2008), National Employer Skills Survey 2007, Learning and Skills Council

4.1 Recruitment and Skills

Businesses can sometimes experience difficulty when attempting to fill employment vacancies. The reasons for this can vary substantially from issues concerning skills, i.e. applicants not having the necessary skills or experience, to concerns related to the nature of the job (e.g. location, poor pay and conditions, unsociable hours, or manual labour). Within this research, the latter types of vacancies are termed as “hard-to-fill vacancies” (HtFVs). Where vacancies are hard-to-fill due to applicants’ lack of skills, qualifications, or experience, these are termed as skill shortage vacancies (SSVs).

Table 4.1 provides an overview of the vacancies within the environmental and land-based sector. The percentages in the table are calculated from the survey of the 991 businesses. Due to the small numbers that correspond to these percentages these figures have been extrapolated to provide a numerical value which is representative of the sector as a whole.

The most notable finding from the Lantra/DARD survey is that only 2% of businesses in the sector reported having a vacancy. When the figures from the survey are extrapolated to be representative of the whole of sector in Northern Ireland the survey indicates that the sector currently has around 1,025 employment vacancies, which equates to 1.6% of the total employment. However, just under half (47%) of the businesses reporting vacancies have vacancies that are hard-to-fill. Around 1% of all businesses within the environmental and land-based sector reported having a hard-to-fill vacancy and just 0.3% reported skills shortage vacancies.

The data available on vacancies from the Northern Ireland Skills Monitoring Survey 2008 is markedly different to the figures obtained from the Lantra/DARD survey. Almost half of the businesses surveyed within the Lantra sector reported vacancies (47%). Of those reporting vacancies, 30% said they were hard-to-fill. Around 4% of all businesses within the sector reported having a hard-to-fill vacancy. However, the data obtained from the Lantra/DARD 2009 survey is more likely to portray a realistic picture of the sector as it is more recent and based on a larger sample of businesses with a wider coverage of the sector.

Table 4.1 Vacancies within the environmental and land-based sector

| | Environmental and land-based sector |
|---|-------------------------------------|
| Number of businesses reporting vacancies | 575* |
| % of businesses reporting a vacancy | 2% |
| Number of vacancies | 1025* |
| Vacancies as % of total employment | 1.6% |
| Number of businesses reporting having an HtFV | 275* |
| % of total businesses reporting HtFV | 1% |
| % of businesses with vacancies reporting HtFV | 47% |
| Number of business reporting having a SSV | 50* |
| % of businesses reporting having a SSV | 0.3% |
| % of businesses with HtFV reporting SSV | 21% |

Table notes: sample base of 991 businesses;

* data is weighted and extrapolated to represent the whole of the sector in Northern Ireland.

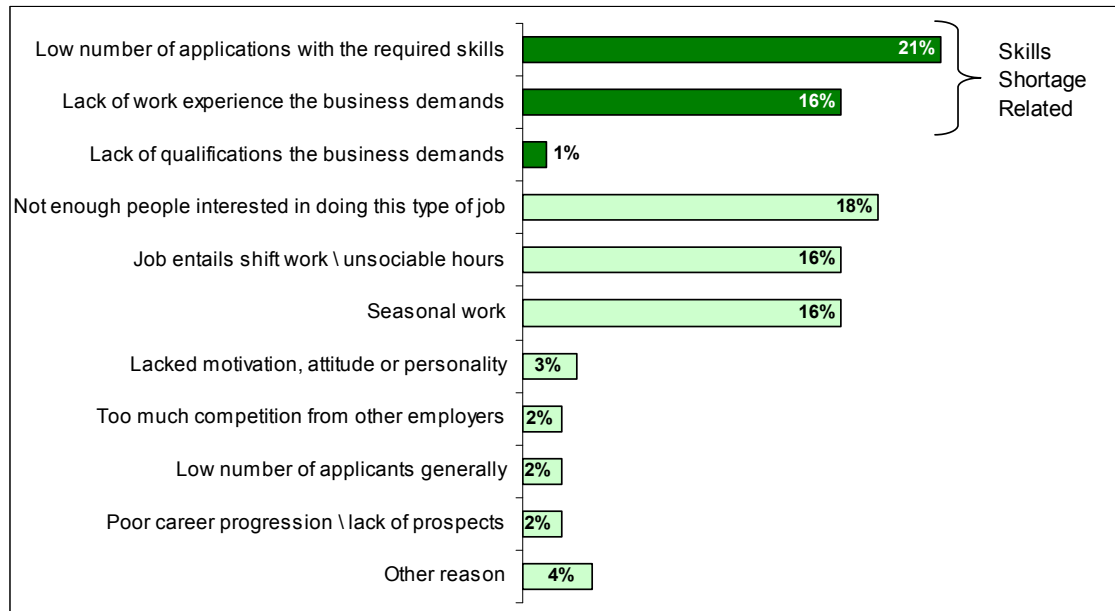
Figures rounded to nearest 25

The 2008 Northern Ireland Skills Monitoring Survey found that 12% of all businesses across all sectors reported having an employment vacancy⁷³. This accounts for around 2% of the total employment. Proportionately, this data suggests that the environmental and land-based sector reports fewer employment vacancies than across the other sectors in Northern Ireland as a whole.

⁷³ IFF Research (2009), Northern Ireland Skills Monitoring Survey 2008, Sector Skills Councils Report (**NOTE:** Lantra sector covers environmental and land-based industries but excludes agriculture)

Figure 4.1 reveals the reasons given by businesses to explain the hard-to-fill vacancies they have. The reasons that relate to skills shortages are grouped together (shown in dark green).

Figure 4.1 Reasons for hard-to-fill vacancies



Sample base = 270; multiple response format.

Figure 4.1 highlights the most commonly cited reason for hard-to-fill vacancies as a lack of applicants with the required skills. These include job specific skills and technical skills to perform the job role to a satisfactory level. A focus group was conducted in May 2010 with key representatives from the equine industry to determine the types of skills that are needed within the industry. Aside from technical and practical skills the main skills cited by the group included knowledge around child protection (in order to comply with current legislation) and customer care skills. For business owners specifically, skills identified were business management, IT skills, health and safety in order to carry out risk assessments, and knowledge of disability legislation.

The most frequently reported reason provided by employers in the sector in order to explain the occurrence of hard-to-fill vacancies, not attributed to SSVs, was that “not enough people were interested in doing the job” (17.9%). The next most frequently recorded responses were associated with the nature of the work schedules: that either the shift work/unsociable hours or seasonal work basis were the reason for having hard-to-fill vacancies (each reason received 16% of total responses).

Around one third of businesses with hard-to-fill vacancies report having these due to skill shortage related issues. Skill shortage vacancies, reported by 0.3% of businesses within the sector, are low in their prevalence. This compares to 3% across all sectors in Northern Ireland⁷⁴.

⁷⁴ IFF Research (2009), Northern Ireland Skills Monitoring Survey 2008, Department for Employment and Learning

The data in Table 4.2 takes a closer look at the proportions of businesses reporting hard-to-fill vacancies at both industry and cluster level. At cluster level, industries involved in “other land management and production” activities reported the highest proportion (5.7%) of businesses with hard-to-fill vacancies. Conversely, businesses reporting hard-to-fill vacancies were least prevalent amongst farming industries; only 0.6% of these businesses reported having a vacancy that was hard-to-fill. In the light of the small size and family-run nature of such businesses, and the numbers of these businesses with off-farm employment, this finding may be expected.

Table 4.2 Hard-to-fill vacancies by industry

| Industry | % of businesses reporting HtFV(s) | Sample base Total 991 |
|---|-----------------------------------|-----------------------|
| Farming | 0.6% | 640 |
| <i>Production Horticulture</i> | <i>10.1%</i> | <i>10</i> |
| Others | 1.7% | 56 |
| Cattle & Sheep | 0.4% | 446 |
| <i>Agricultural Cereals & Crops</i> | <i>0.0%</i> | <i>15</i> |
| <i>Pigs & Poultry</i> | <i>0.0%</i> | <i>19</i> |
| Dairy | 0.0% | 94 |
| Other Land Management & Production | 5.7% | 156 |
| <i>Trees & Timber</i> | <i>7.7%</i> | <i>13</i> |
| <i>Agricultural Services</i> | <i>7.4%</i> | <i>27</i> |
| Floristry | 4.4% | 47 |
| Land-based Engineering | 2.0% | 47 |
| <i>Aquaculture</i> | <i>0.0%</i> | <i>11</i> |
| <i>Fencing</i> | <i>0.0%</i> | <i>11</i> |
| Animal Health & Welfare | 4.4% | 114 |
| <i>Equine</i> | <i>16.0%</i> | <i>13</i> |
| Veterinary Nursing and Ancillary Activities | 3.4% | 27 |
| Animal Care | 2.8% | 73 |
| <i>Farriery</i> | <i>0.0%</i> | <i>1</i> |
| Environmental Industries | 0.7% | 81 |
| <i>Environmental Conservation</i> | <i>4.7%</i> | <i>20</i> |
| Landscaping\Amenity Horticulture | 2.0% | 52 |
| <i>Game & Wildlife Management</i> | <i>0.0%</i> | <i>7</i> |
| <i>Fisheries Management</i> | <i>0.0%</i> | <i>2</i> |

Percentages in italics refer to data calculated from sample base <40

- refers to industries that have reported no HtFVs

The equine industry revealed the highest proportion of businesses with vacancies that were hard-to-fill; 16% of businesses reported these, however it should be noted that the equine data has been derived from a sample base of only 13 businesses, therefore the figure is indicative of the industry as opposed to being statistically robust. Several industries did not report having any hard-to-fill vacancies at all.

4.2 Skills Gaps

This section turns to look at the level of skill deficiencies amongst the current workforce. Discussion focuses on the distribution and prevalence of skills gaps, the types of jobs affected, and the types of skills identified as lacking amongst staff members.

A skill gap is defined as a lack or shortcoming in an employee's proficiency to perform their required job role. The figures and percentages presented in Table 4.3 are drawn from the sample of 991 businesses, except for those figures in the highlighted column, which are extrapolated to provide an indication of the numbers involved in the sector as a whole. The table shows that 5.9% of businesses within the environmental and land-based sector report at least one member of staff with a skill gap. When the figures from the survey are extrapolated to be representative of the whole of sector in Northern Ireland, it is estimated that around 5,350 employees are lacking proficiency in their respective job roles. The number of staff reported as having a skill gap represents around 8% of the sector's total employment.

The Lantra/DARD survey has found that the percentage of establishments with skills gaps and indeed the percentage of skills gaps as a proportion of employment are considerably lower when compared with the data from the 2008 Northern Ireland Skills Monitoring survey. In 2008, 29% of establishments in the sector reported skills gaps (cf. 22% for all sectors in Northern Ireland) and the skills gaps as a proportion of total employment was 10% (cf. 8% for all sectors in Northern Ireland).⁷⁵ However, it should be noted that the Lantra/DARD 2009 survey is a more recent survey with a larger sample and better coverage of the sector than the Northern Ireland Skills Monitoring Survey.

In contrast, skill gaps within the environmental and land-based sector in Northern Ireland are more common compared to the sector in England, where skill gaps represent 5% of employment⁷⁶. In terms of the overall distribution of skills gaps between the industry clusters, farming businesses report the highest number of skills gaps (3,600 based on extrapolated figures) and therefore the highest percentage share of skills gaps overall (67.3%). This result is to be expected given the predominance of farming in terms of both business and employment numbers over the other environmental and land-based industries.

⁷⁵ IFF Research (2009), Northern Ireland Skills Monitoring Survey 2008, Sector Skills Councils Report, Department for Employment and Learning (**NOTE:** survey covers environmental and land-based industries but excludes agriculture)

⁷⁶ IFF Research (2008), National Employer Skills Survey, Learning and Skills Council

On the other hand, no skills gaps were reported within the production horticulture, equine and farriery industries. For production horticulture and farriery this may be attributed to the small sample of businesses surveyed within these two industries. For the equine industry, it was found that 92.3% of businesses had undertaken training within the past 5 years (Table 5.2) therefore the absence of skills gaps within the industry is unsurprising.

Table 4.3 Distribution of skill gaps by industry cluster*

| Industry cluster | % of businesses reporting skill gaps | No. of skill gaps (extrapolated figures ⁷⁷) | % share of skill gaps | Skill gaps as % of total employment | Sample base (unweighted) |
|---|--------------------------------------|---|-----------------------|-------------------------------------|--------------------------|
| Farming | 5.2% | 3600 | 67.3% | 7.4% | 640 |
| Agricultural Cereals & Crops | 3.0% | 77 | 1.4% | 5.2% | 15 |
| Production Horticulture | - | - | - | - | 10 |
| Pigs & Poultry | 7.0% | 41 | 0.8% | 4.2% | 19 |
| Dairy | 7.0% | 370 | 6.9% | 5.8% | 94 |
| Cattle & Sheep | 5.1% | 3062 | 57.3% | 8.6% | 446 |
| Others | 3.4% | 63 | 1.2% | 1.8% | 56 |
| Other land management & production | 7.2% | 675 | 12.6% | 9.6% | 156 |
| Agricultural Services | 3.7% | 218 | 4.1% | 5.6% | 27 |
| Aquaculture | 8.0% | 2 | 0.0% | 1.5% | 11 |
| Fencing | 18.0% | 9 | 0.2% | 3.0% | 11 |
| Floristry | 10.8% | 85 | 1.6% | 17.0% | 47 |
| Trees & Timber | 23.1% | 35 | 0.7% | 15.9% | 13 |
| Land-based Engineering | 10.5% | 314 | 5.9% | 16.0% | 47 |
| Animal health & welfare | 14.0% | 175 | 3.3% | 4.6% | 114 |
| Animal Care | 19.2% | 130 | 2.4% | 11.8% | 73 |
| Equine | - | - | - | - | 13 |
| Farriery | - | - | - | - | 1 |
| Veterinary Nursing and Ancillary Activities | 11.0% | 54 | 1.0% | 2.3% | 27 |
| Environmental industries | 13.5% | 875 | 16.4% | 24.6% | 81 |
| Environmental Conservation | 24.7% | 315 | 5.9% | 31.5% | 20 |
| Fisheries Management | - | - | - | - | 2 |
| Game & Wildlife | 14.3% | 557 | 10.4% | 50.6% | 7 |
| Landscaping/ Amenity Horticulture | 4.0% | 10 | 0.2% | 0.7% | 52 |
| Environmental & Land-based sector | 5.9% | 5350 | 100.0% | 8.4% | 991 |

Table notes: * Data has been derived from recalculated/recoded variables based on questions C3 and C4 in the survey. Data is weighted; number of skills gaps have been rounded at cluster level to nearest 25 (total may not equal sum of totals due to rounding) – refers to industries that have not reported any skills gaps.

⁷⁷ See Section 1.3 for further explanation on weighting and extrapolated figures

The actual proportion of businesses reporting skills gaps within the non-farming industry clusters is at a greater level than amongst the farming cluster. Animal health and welfare industries exhibit the highest proportion of businesses reporting skill gaps (14%), although this cluster of industries report the lowest percentage of skill gaps as a proportion of total employment (4.6%) and the lowest percentage share of skill gaps (3.3%).

At an industry level, environmental conservation reports the greatest proportion of businesses with skill gaps; almost one quarter (24.7%) report having a staff member that lacks proficiency in their role.

Of the industries where data has been derived from an acceptable sample size, floristry exhibits both a high proportion of businesses reporting skill gaps (10.8%) and a high level of skill gaps as a proportion of employment (17.0%). Land-based engineering reports similar figures. The animal care industry presents a high level of businesses reporting skill gaps (19.2%) but a relatively low level of skill gaps as a proportion of employment (11.8%).

Looking more specifically at skill gaps in relation to qualification attainment and training, one interesting finding is that the environmental industries report the highest percentage of skill gaps as a percent of total employment (24.6%). However, they also have a fairly high proportion of workers with qualifications (see Figures 5.5 and 5.6) and almost half of businesses said that training had been undertaken within the past 2 years (Table 5.1). The high level of skill gaps is likely to be due to the fact that people are often recruited into environmental occupations from a variety of disciplines, which may mean that specific skills or technical training is required for them to perform their role.

In contrast to this, only 7.4% of employment within the farming cluster is reported to have skill gaps although it is this cluster which has the highest proportion of workers without any qualifications (Figures 5.5 and 5.6) and the lowest levels of training activity during the past 2 years (Table 5.1). Evidence from the focus group participants suggest this is largely due to the “isolatory” nature of farming and the perception that they have gained sufficient on-the-job skills.

The data in Table 4.4 presents the reported skill gaps in the environmental and land-based sector by occupation level. Figures in the highlighted column are extrapolated from the survey of 991 businesses to provide a picture of the sector as a whole. The job levels are as defined in Standard Occupational Classification⁷⁸.

Table 4.4 Occupational distribution of skills gaps

| Occupations | No. of skill gaps (n) (Extrapolated figures ⁷⁹) | % share of skill gaps | % share of employment (at job level) | Skill gaps as % of total employment (at job level) |
|------------------------------------|--|-----------------------|--------------------------------------|--|
| Managers and proprietors | 1425 | 27.0% | 24.3% | 12.0% |
| Professional occupational | 125 | 2.4% | 3.7% | 6.8% |
| Associate professional | 75 | 1.4% | 2.5% | 6.2% |
| Administrative and secretarial | 425 | 8.1% | 5.9% | 14.7% |
| Skilled trades | 2625 | 49.8% | 26.5% | 20.2% |
| Personal service | 25 | 0.5% | 1.9% | 2.7% |
| Sales and customer service | 25 | 0.5% | 2.2% | 2.3% |
| Process, plant, machine operatives | 100 | 1.9% | 11.5% | 1.8% |
| Elementary occupation | 450 | 8.5% | 21.5% | 4.3% |
| All occupations | 5350 | 100.0% | 100.0% | 8.4% |

Table notes: Sample base (unweighted) = 991 businesses. Data weighted and rounded to nearest 25

In volume terms, almost half (49.8%) of all skill gaps within the sector are reported to occur amongst skilled trades occupations; equating to around 2,625 staff lacking some job role proficiency. Just under a third (27%) of total skill gaps were reported to occur at manager level; equating to around 1,425 staff. This would tend to reflect the highly skilled nature of many occupations within the sector and also those sole proprietors or managers of micro-businesses who tend to take on multiple roles within the business, which require a mix of technical and business management skills. The skills identified included practical competence in tractor and trailer driving and handling, ploughing and grassland management. Skills relating to information technology in respect of farm management were also cited.

In terms of skill gaps as a proportion of the total employment at the specific job level, the concentration of skill gaps occurs at skilled trade level; 20.2% of workers at this level have a skill gap. Invariably, job roles at this level require a high level of specialist skills alongside generic job related skills. Managers, proprietors, administrative and secretarial workers also have a high proportion of skill gaps in the workforce.

⁷⁸ Office of National Statistics (2000), Standard Occupational Classification

⁷⁹ See Section 1.3 for further explanation on weighting and extrapolated figures

Table 4.5 reveals the skills stated as lacking by businesses reporting staff with skill gaps. At the sector level, the most commonly mentioned skill reported as lacking amongst staff members was "communication skills" (of total responses this was reported in 15.4%). Communications skills would include basic written and verbal skills through to negotiation and presentation skills. For some businesses this may also include ESOL for their migrant workers. Following this, "planning and organising" (11.8% reported this) were the second most frequently reported skills found lacking in members of the current workforce. In contrast, however, comments from the focus groups highlighted practical and technical skills as key needs, particularly in farming.

Table 4.5 Skills lacking in staff reported as having skill gaps, by industry cluster

| | Farming | Other land management & production | Animal health & welfare | Environmental industries | Environmental & land-based sector |
|--|---------|------------------------------------|-------------------------|--------------------------|-----------------------------------|
| | % | % | % | % | % |
| Technical and practical skills | - | 5.6% | 9.3% | 6.1% | 1.2% |
| Basic computing or information technology skills | 9.6% | - | 6.7% | 6.1% | 8.7% |
| Specialist computing skills associated with your business | 3.2% | 2.2% | - | - | 2.8% |
| Communication skills | 16.3% | 5.6% | 16.0% | 13.2% | 15.4% |
| Customer handling skills | 3.2% | 12.4% | 18.7% | 6.1% | 4.7% |
| Planning and organising | 13.1% | 12.4% | - | 6.1% | 11.8% |
| Team working skills | 6.5% | 12.4% | - | 6.1% | 6.5% |
| Foreign language skills | - | - | - | 6.1% | 0.4% |
| Problem solving skills | 6.5% | 18.0% | - | 6.1% | 6.8% |
| People management skills | 3.5% | 6.7% | 4.0% | 13.2% | 4.3% |
| Numeracy skills | 6.4% | - | 9.3% | - | 5.7% |
| Literacy skills | 6.4% | - | 9.3% | 6.1% | 6.2% |
| Marketing and sales | 3.2% | 6.7% | 4.0% | - | 3.2% |
| Accounts | 9.6% | 9.0% | 4.0% | - | 8.6% |
| Record keeping | 3.2% | 9.0% | 4.0% | 6.1% | 3.8% |
| Complying with employment legislation (ask before other legislation) | 3.2% | - | - | 6.1% | 3.1% |
| Complying with other legislation | - | - | - | 6.1% | 0.4% |
| Any other skills, please specify | 6.2% | - | 14.7% | 6.1% | 6.5% |
| | | | | | |
| Sample base | 33 | 17 | 17 | 8 | 75 |

Table notes: Multiple response question format

■ = skill type reported most often

*care should be taken with cluster-level data, as results are based on sample sizes <50

- refers to industry clusters that have not reported this skill type

The absence of technical and practical skills, cited as lacking in farming, is somewhat surprising given the skilled nature of many of the job roles within the industry. Results from the survey would suggest that individuals in these businesses are suitably skilled, or that they acquire the required skills or gain experience or training on the job to ensure proficiency and retain competence. This is reflected by the focus group comments,

“Many farmers are unsure of what training and skills development they need; they don’t know what they don’t know.”

There may be a need for Training Needs Analysis and then a way of matching this to provision.

The breadth of skills required in farming demonstrates that job roles within the industry are multi-disciplinary, as supported by the wide range of skills cited as being lacking in the workforce. This would also echo the small-business nature of the industry where business management skills (encompassing much of the skills listed in the table above) are as important as technical and practical skills. It is these skills that seem to be the most demanded by respondents.

Animal health and welfare businesses report a need for customer handling and communication skills, perhaps reflecting the level of interface required with owners. This may also indicate that such skills are a necessary component of any learning programmes or qualifications. Whilst it is interesting to note that 14.7% of animal health and welfare respondents highlighted “other” skill requirements, no examples were provided in responses or cited in focus groups.

Environmental industries indicated that communication and people management were lacking in current employees. Given the need in many such organisations to work with and manage volunteers (particularly within environmental conservation organisations), these requirements could be anticipated.

When looking at other land management and production businesses, problem solving and business skills appear to be most often stated as needed.

4.3 Farm Diversification and Re-skilling

With the current economic climate, diversification could lead to numerous advantages, including increased revenue and security for businesses within the sector. The Lantra/DARD survey investigated whether farms had diversified into other business activities, whether they had future plans to diversify and whether skills would need to be developed within the business to aid this.

From a skills perspective, a diversification in work practice invariably elicits, at some level, a diversification in existing workforce job roles and inherent skill requirements. The data in Table 4.6 identifies the farm types that are either planning to diversify business activities or start up a new business at some point in the next 5 years.

Looking at businesses that have already undertaken some diversification in practice, of which there are around 1,800 in Northern Ireland⁸⁰, the cattle and sheep sub-sector provide the greatest number of diversifying businesses. However, this result was to be expected as cattle and sheep farms represent the vast majority (73%) of farm businesses currently active within Northern Ireland⁸¹.

Table 4.6 Farm businesses looking to diversify or start up a new business in the next 5 years

| | No. of businesses that have already undertaken diversification (Extrapolated figures ⁸²) | % of businesses that have already undertaken diversification | No. of businesses planning to diversify in next 5 years* (Extrapolated figures ⁸³) | % of businesses planning to diversify in next 5 years* |
|------------------------------|--|--|--|--|
| | n | % | n | % |
| Farming cluster | 1790 | 6.9 | 2030 | 7.8 |
| Agricultural Cereals & Crops | 90 | 10.8 | 130 | 15.0 |
| Production Horticulture | 0 | 0 | 0 | 0 |
| Pigs & Poultry | 120 | 20.5 | 80 | 14.0 |
| Dairy | 350 | 10.1 | 110 | 3.1 |
| Cattle & Sheep | 980 | 5.2 | 1650 | 8.7 |
| Others | 250 | 13.6 | 60 | 3.4 |

Table notes: data weighted and rounded to nearest 10 businesses (Overall total may not therefore equal sum of business totals); unweighted sample base for farm businesses = 640

*Data for businesses planning to diversify excludes farm businesses that have already undertaken diversification practices

The greatest proportion of farm businesses that have diversified, by farm type, occurs from within the pigs and poultry sub-sector (20.5% of businesses within this sub-sector have diversified). Specific comments from relevant stakeholders and focus group participants cited consolidation brought on by poor economic returns as the main driver for change within the pig sector. With pig producers either exiting the industry completely or acting a “finishers” for larger producers, this provided more time to either diversify in other areas of farming or seek off-farm employment.

80 Based on extrapolated figures from the survey

81 Department of Agriculture and Rural Development (2009), Agricultural Census

82 See Section 1.3 for further explanation on weighting and extrapolated figures

83 See Section 1.3 for further explanation on weighting and extrapolated figures

Extrapolated figures (as highlighted) indicate that over 2,000 more farming businesses are planning to diversify their current practices or start up a new business in the next 5 years; this equates to almost 8% of the total farming sector in Northern Ireland. The farm type with the greatest proportion of businesses looking to diversify in the next 5 years is currently the cereal and crops sub-sector; 15% of businesses within this sub-industry are reported to be planning to diversify or start up a new business. Similarly, 14% of businesses within the pigs and poultry sub-sector are looking to diversify in the next 5 years.

Figure 4.2 depicts some of the planned routes by farm businesses that are looking to diversify farming activities and land use in the next 5 years. Around one quarter (23.8%) of total responses specified that farm businesses were planning to establish “other” activities that were outside the typical scope⁸⁴ of diversification practices. The businesses failed to expand on these other practices but the consensus from focus groups was that farms would generally become larger due to diversification activities. Comments included, “*Farms will get bigger and farmers will get fewer*” and, “*If you are running a bigger farm, your job will be managing livestock. You will look to bring in people to do those other jobs*”.

A further 20.8% of responses did not know specifically which new activity they would be looking to establish; this reinforces the necessity for such support systems as those organised by DARD and the Rural Development Programme to ensure that business advice and guidance structures are able to equip business owners with the relevant skills to properly investigate diversification options and assess associated skills development. Of these responses it can be inferred that, in the next few years, many farm businesses would benefit from having sound information resources as a reference to guide their diversification decision-making.

Figure 4.2 Plans for farm businesses looking to diversify in next 5 years

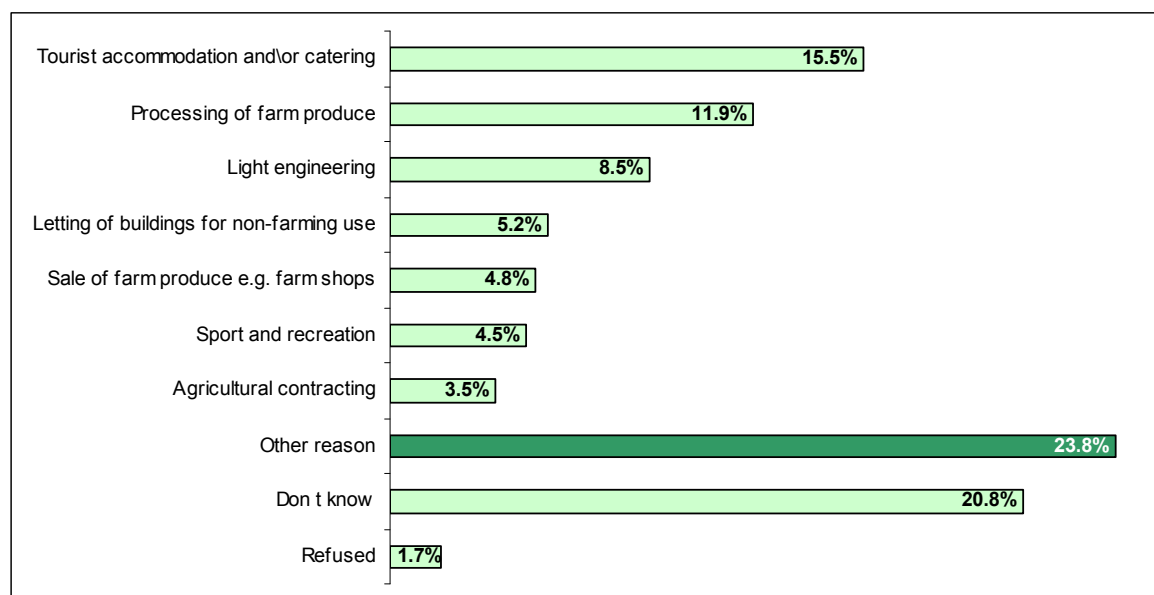


Figure notes: Based on farm business sample of 54 (filtered for only those businesses looking to diversify in next 5 years); multiple response question format

⁸⁴ Typical scope means industry specific

Other farming businesses were surer of their diversification aspirations, 15.5% of responses stated that they were planning to incorporate tourist accommodation and/or catering onto their site. Slightly less removed from farming, 11.9% of respondents were planning to introduce produce-processing activities.

Of the farm businesses that reported to be planning diversification activities within their business in the next five years, 44% reported that those members of the business to be involved in the diversification process would need to learn new skills.

Figure 4.3 New skills required in farm business diversification plans

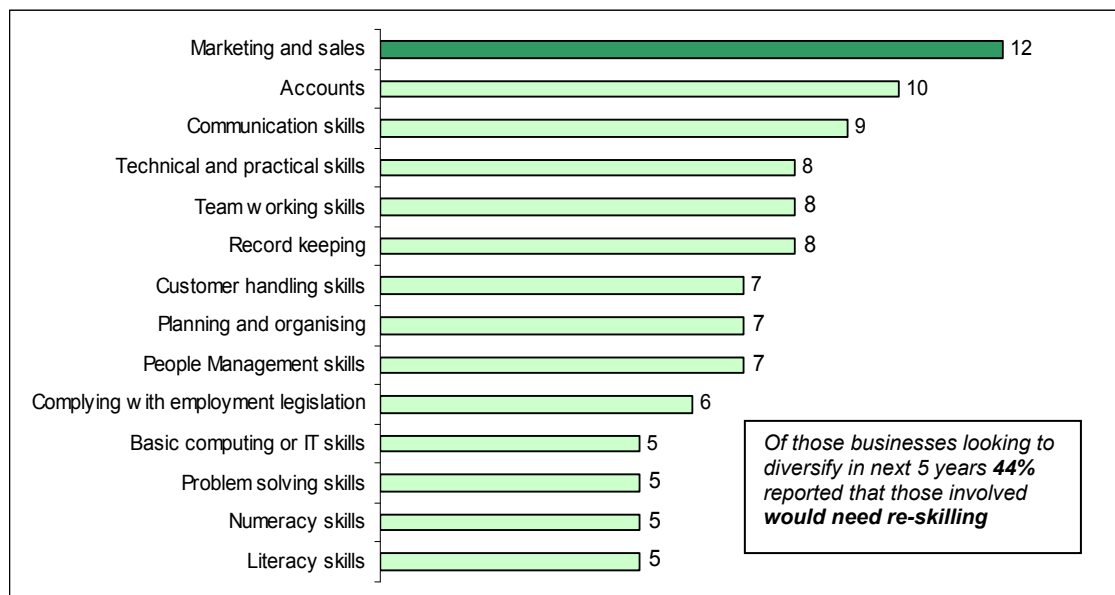


Figure note: actual survey responses as sample size <50, data is unweighted

The new skills reported as being required within businesses planning to diversify are presented in Figure 4.3. The skill type reported most often by farm businesses was “marketing and sales”; the second most common response was “accounts skills” and thirdly “communication skills”. Technical and practical skills, namely those which would be specific to the diversification practice, only figure fourth on the list of skill requirements. This suggests that it is the business management, business planning and development skills, which are in greatest demand. It also supports the developing notion that technical skills are being supported in both current learning provision and in terms of professional development, be it formal or informal.

It is worth highlighting some findings here from the Northern Ireland Rural Development Programme (RDP)⁸⁵. A specific measure of the programme provides financial support to farm families to provide up-skilling and re-skilling opportunities to support on or off farm opportunities. Requests for support indicate that over two thirds of training (68%) relates to vehicle training and only 12% was linked to agriculture. Three quarters of the vehicle-related training requests as funded by the RDP, were for Heavy Goods vehicles. This is in stark contrast to the findings of the primary research undertaken for this report, which highlighted business and management related skills as the main skills requirement.

⁸⁵ Rural Development Council 2010

4.4 Employer Views on Skills and Qualification Requirements in 5 years time

The data in Table 4.7 reveals employer views on the predicted skills and qualification levels likely to be required in the next 5 years. This data looks at all environmental and land-based businesses, as opposed to only those planning to diversify in the coming years.

Table 4.7 Skills identified by businesses as likely to be required in 5 years time

| Skills types reported by businesses | Farming | Other land management & production | Animal health & welfare | Environmental industries | Environmental & Land-based sector |
|---|---------|------------------------------------|-------------------------|--------------------------|-----------------------------------|
| Technical and practical skills | 6.5% | 7.5% | 6.3% | 6.9% | 6.7% |
| Basic computing or IT skills | 7.7% | 7.7% | 6.3% | 7.9% | 7.7% |
| Specialist computing skills associated with your business | 4.1% | 3.2% | 3.5% | 2.4% | 4.0% |
| Communication skills | 6.3% | 6.1% | 6.3% | 6.5% | 6.3% |
| Customer handling skills | 4.7% | 7.1% | 7.0% | 5.3% | 4.9% |
| Planning and organising | 6.9% | 6.5% | 6.3% | 8.1% | 6.9% |
| Team working skills | 5.1% | 6.3% | 7.0% | 6.7% | 5.3% |
| Foreign language skills | 1.2% | 0.8% | 1.4% | 0.2% | 1.1% |
| Problem solving skills | 5.9% | 5.7% | 4.9% | 6.5% | 5.9% |
| People management skills | 5.1% | 6.1% | 6.3% | 5.5% | 5.2% |
| Numeracy skills | 5.8% | 6.1% | 5.6% | 5.1% | 5.8% |
| Literacy skills | 6.0% | 6.1% | 6.3% | 5.1% | 5.9% |
| Marketing and sales | 5.6% | 6.3% | 6.3% | 5.5% | 5.6% |
| Accounts | 7.4% | 5.9% | 5.6% | 5.1% | 7.1% |
| Record keeping | 7.9% | 6.5% | 7.0% | 6.5% | 7.7% |
| Complying with employment legislation | 6.0% | 5.7% | 5.6% | 8.1% | 6.0% |
| Complying with other legislation | 7.1% | 6.3% | 6.3% | 8.3% | 7.1% |
| Any other skills | 1.0% | 0.4% | 1.4% | 0.2% | 0.9% |
| Sample base (unweighted) | 640 | 156 | 114 | 81 | 991 |

Table notes: multiple response format; responses weighted.

The range of answers provided indicates a lack of consensus; for example only four categories of skill type received fewer than 5.2% of the total responses. This potentially indicates that a wide variation in business skill requirements exists across the sector. The data reported at cluster-level reveals a similar trend.

Whilst businesses across the sector most often cited basic computing or information technology skills together with record keeping skills (7.7% of responses were reported in each of these skills), perhaps with a mind to compliance and traceability requirements, the main feature of the results would seem to be the continuing need for a broad range of skills across the four sector clusters.

Specifically some degree of variance between clusters can be seen. Farming businesses highlighted record keeping, accounts and complying with legislation as important, with customer service type categories and team working featuring in the responses from other land management and production and animal health and welfare clusters. Environmental businesses cited compliance with legislation together with planning and organisation as top of their lists. Focus group participants indicated that they rarely undertook training outside that which is required for compliance. Practical skills development was viewed as being acquired whilst doing the “job” and not necessarily as part of any formal programme.

Interestingly the farming cluster did identify, unlike in their assessment of current skill requirements, technical and practical skills as needed in five years time, possibly in anticipation of drivers such as climate change and low carbon technologies, which may require additional knowledge skills. It may be useful therefore to look at the policy drivers and technology changes to explore any specific skills needs highlighted, and this is explored further in Chapter 6.

Again, from discussions with focus groups, it is the provision of business related skills that seems to be most common need, highlighted particularly in the equine industry but also important across the sector as a whole. The need to include generic business and finance skills in training and development would appear to support previous research from Lantra carried out across the sector in the UK for the Sector Qualifications Strategy⁸⁶. This document highlighted the need for sector-specific vocational qualifications and learning programmes, particularly in further education, to encompass business and enterprise skills and knowledge. This area of work is currently being undertaken in conjunction with awarding organisations to re-develop qualifications as they move into the Qualification and Credit Framework.

The survey explored with business owners what minimum level of qualification they felt would be needed by themselves and their staff in 5 years time. A large percentage of respondents said they did not know what qualifications would be needed (69.5%). Generally, business owners specified that 5 GCSEs, grades A-C or NVQ Level 2 would be needed or they listed “other” responses, which include informal learning. This suggests that sector-specific (vocational) qualifications may be being perceived as relevant, or it is a recognition of the fact that the sector uses more informal learning and/or non-accredited qualifications to recognise the skills needed.

⁸⁶ Sector Qualification Strategy: Recognising Skills, Learning and Professional Development in the Environmental and Land-based Sector, October 2007

When analysing the data by industry cluster it was found that a higher percentage of animal health and welfare business owners (compared to the other industry clusters) felt that higher level qualifications would be needed by the business in 5 years time.

Table 4.8 Minimum level of qualification (identified by businesses) as likely to be required in 5 years time

| What minimum level of qualification will you and your workers require in 5 years time? | Farming | Other land management and production | Animal health and welfare | Environmental industries | Environmental and land-based sector |
|--|---------|--------------------------------------|---------------------------|--------------------------|-------------------------------------|
| Masters or Higher Degree, PhD | 0.3% | 0.0% | 3.6% | 0.0 | 0.3 |
| Degree, NVQ Level 4 | 1.0% | 2.5% | 12.5% | 8.1 | 1.6 |
| A level, Diploma, NVQ Level 3 | 5.3% | 6.4% | 10.7% | 2.8 | 5.5 |
| GCSE 5 Grades A-C, NVQ Level 2 | 8.6% | 7.1% | 19.6% | 8.1 | 8.8 |
| GCSE Grades D-G, NVQ Level 1 | 2.7% | 1.9% | 1.8% | 8.1 | 2.7 |
| Other, please specify | 13.6% | 12.7% | 8.9% | 5.7 | 13.2 |
| Don't know | 69.9% | 72.8% | 51.8% | 67.6 | 69.5 |

Table notes: multiple response format; responses weighted

The “other” responses to the question “What minimum level of qualification will you and your workers require in 5 years time?” have been grouped into two categories: farm and non-farm. Most of the respondents from farming businesses emphasised that qualifications were not needed within the business and that experience and/or general knowledge was more helpful. This was reflected in comments such as, *“I don’t think it’s relevant for farmers to have qualifications, it’s more about hands on experience.”* or *“You don’t need qualifications for farm work such as tractor driving etc.”*

This again supports the statements in previous chapters regarding the lack of appreciation of formal qualifications, particularly in terms of working owners in farming, or the lack of understanding of the qualifications system or content of relevant qualifications. One participant succinctly summarised this and commented, *“No qualifications will be required.”*

4.5 Key Considerations

Business owners appear to be able to assess their immediate needs for skills but are less certain when it comes to the skills required for future business needs. It is evident that those businesses that are clear about their choice of diversification have an indication of the future skills and qualification requirements needed for their chosen venture. In general, respondents seem to highlight business-type skills as key to their requirements, both now and in five years time. It becomes apparent that better and longer term business planning, with associated sector-specific advice and support, would better equip businesses to understand their future requirements.

When recruiting for vacancies it is clear that there is currently a lack of value placed on qualifications and training, and their role in the skills development of the current workforce, especially in farming. This may also be reflected in the low prevalence of skills shortage vacancies. While this may highlight a lack of understanding of the qualifications system and awareness of what specific training support is available to the industry, this also needs to be reconciled with the evidence that the sector is identifying future skill requirements and the need for other qualifications.

5.0 Training Practices

Chapter Summary

- The Lantra/DARD survey showed that there are low levels of training with the sector in Northern Ireland. Close to half of businesses report that they have never funded or arranged training for their staff
- The training that does occur appears to be ad-hoc as the levels of business and training planning are also low
- The most commonly cited reasons for not training were cost, time taken up by training and that staff were already fully proficient
- When training does take place businesses in the sector most frequently used specialist land-based colleges and private providers. There is also the highest level of satisfaction with the appropriateness of the skills provided by these two groups for business needs

This chapter takes a closer look at the current training activities being undertaken. Training is a critical resource utilised by employers to both develop workforce skills and to lessen the effects and extent of skill gaps.

The Lantra/DARD business survey gave respondents a broad definition of training:

“By training we mean any activities, on- or off- the job, through which managers and workers improve their work related skills. It may occur ‘one-off’ or be over a longer period of time. It does not have to be linked to a qualification.”

The data reported here will investigate a number of key factors surrounding training activity in the sector; factors covered include arrangement of training, funding of training, employer views on training, employer views on the providers of training, and barriers to training.

5.1 Training Activity

Overall, the sector level data in Table 5.1 reveals a worrying picture; according to the figures, just under half (47.1%) of all businesses reported not having arranged any form of training for their members of staff. Around 36% of businesses within the sector reported having arranged some form of training in the last 5 years. To put this data into some form of context, in all other sectors in Northern Ireland, 74% of employers reported to have arranged or funded training for their employees in the previous twelve months⁸⁷.

Table 5.1 When was the last time someone in the business undertook training?

| | Within the last 2 years | 2-5 years ago | 6-10 years ago | More than 10 years ago | No training undertaken | Don't know | Sample size |
|------------------------------------|-------------------------|---------------|----------------|------------------------|------------------------|------------|-------------|
| | % | % | % | % | % | % | n |
| Farming | 17.4 | 15.7 | 3.0 | 8.1 | 50.8 | 4.9 | 640 |
| Other land management & production | 47.7 | 7.6 | 6.4 | 3.7 | 27.6 | 7.1 | 156 |
| Animal health & welfare | 56.5 | 12.0 | 1.5 | 2.4 | 19.3 | 8.3 | 114 |
| Environmental industries | 47.0 | 12.7 | 11.5 | 0.8 | 26.3 | 1.7 | 81 |
| Environmental & land-based sector | 21.7 | 15.5 | 3.6 | 7.2 | 47.1 | 4.9 | 991 |

Figure notes: Weight applied to the data

The level of training provision in the last 2 years varies substantially between farming and non-farming industries. Within the farming cluster only 17.4% of businesses reported to have had staff undertake at least some form of training over the last 2 years. Over 50% of businesses reported not to have had any staff undertake training. Barriers to training, particularly for farming businesses, are discussed within section 5.3.

The businesses within the non-farming clusters report similar trends to one another; between 47-57% reported having had staff undertake at least some form of training in the last 2 years. Around one quarter of businesses within these clusters reported having had no members of staff undertake any form of training, far lower than the proportion within the farming industries. However, discussions within the focus groups highlighted that training is “part of the job” within some industries, for example *“Training is ‘part and parcel’ of employment with Forest Service.”*

⁸⁷ IFF Research (2009), Northern Ireland Skills Monitoring Survey 2008, Department for Employment and Learning

Table 5.2 Training activity by industry/farm type

| Industry | Arranged any training in the last 5 years | Sample base n |
|---|--|------------------|
| | % | |
| Farming | 33.1% | 640 |
| <i>Pigs & Poultry</i> | 57.9% | 19 |
| <i>Cereals & Crops</i> | 40.0% | 15 |
| Dairy | 39.4% | 94 |
| Cattle & Sheep | 31.8% | 446 |
| <i>Horticulture</i> | 30.0% | 10 |
| Others | 28.6% | 56 |
| | | |
| Other land management & production | 55.2% | 156 |
| Trees & Timber | 76.9% | 13 |
| Floristry | 63.8% | 47 |
| Land-based Engineering | 57.4% | 47 |
| <i>Aquaculture</i> | 54.5% | 11 |
| <i>Agricultural Services</i> | 51.9% | 27 |
| <i>Fencing</i> | 36.4% | 11 |
| | | |
| Animal health & welfare | 68.5% | 114 |
| Equine | 92.3% | 13 |
| Veterinary Nursing and Ancillary Activities | 81.5% | 27 |
| Animal Care | 54.8% | 73 |
| <i>Farriery</i> | <i>n/a</i> | 1 |
| | | |
| Environmental industries | 59.7% | 81 |
| <i>Environmental Conservation</i> | 90.0% | 20 |
| Landscaping/ Amenity Horticulture | 55.8% | 52 |
| <i>Game & Wildlife</i> | 20.0% | 7 |
| <i>Fisheries Management</i> | <i>n/a</i> | 2 |
| | | |
| Environmental & Land-based sector | 37.2% | 991 |

Weight applied to data at cluster level

Data in italics is derived from sample base <40

Levels of training within farming are lower than any other cluster of industries. Within farming, levels of training are lowest within the cattle and sheep and horticultural areas. A possible explanation for the low levels of training is that respondents associate the word “training” with formal courses and/or qualifications. Evidence from the more qualitative focus groups suggests this may be the case. Many focus group participants indicate that a lot of skill development in the sector is more informal – through activities like discussion groups or from focus/monitor farms where farmers have the opportunity to learn from each other. This was reflected in comments from focus group participants who explained, “*It makes you think about what you are doing and why you are doing that. You think I’m doing this or that because it’s the way my dad done it, and that’s the way I’ve always done it. Where as you end up challenging yourself more because you have to, sort of, explain yourself.*”

In contrast, industries with a high level of training include equine, environmental conservation and veterinary nursing and ancillary activities. Considering much of the veterinary nursing and ancillary activities industry is regulated, the high level of training activity is unsurprising. For example, registered veterinary nurses are required to complete a minimum number of hours of continuing professional development over a three-year period in order to keep their skills up-to-date.

The data in Table 5.3 reports the level of planning that surrounds both the business development and workforce training schedules. Training plans are a useful tool in standardising workforce development by setting clear objectives for specific employee training requirements to suit both personal and business needs for the year ahead.

Table 5.3 Business planning for training

| Industry cluster | Has a written business plan/farm development plan only | Has a written training and development plan only | Has both a business plan and a training plan | Sample base |
|--|--|--|--|-------------|
| | % | % | % | n |
| Farming | 9 | 1 | 3 | 640 |
| Other land management & production | 11 | 6 | 5 | 156 |
| Animal health & welfare | 18 | 6 | 12 | 114 |
| Environmental industries | 39 | 13 | 4 | 81 |
| Environmental & Land-based sector | 11 | 2 | 4 | 991 |

Table notes: Data is based on weighted estimates

According to the data reported at sector level, 11% of businesses reported having only a written business plan or farm development plan, while 2% of businesses reported having only a written training and development plan. Around 4% of businesses within the sector reported having both a business plan and a training and development plan.

The data at cluster level reveals a variation in the level of training and business planning. The farming cluster reported the lowest proportions of businesses with either business/farm development plans (9%), training and development plans (1%), or both (3%).

The data shows that overall very few businesses within the environmental and land-based sector formally plan ahead for their training needs. Furthermore, the data suggests that any training undertaken is arranged on an “as and when” basis – as training needs become evident or when opportunities to train are presented.

When training does occur 48% reported to have funded the last training activity themselves. Table 5.4 shows that the farming business cluster reported the lowest proportion of businesses funding their employees’ last training activity (36%).

Table 5.4 Whether businesses funded the most recent training undertaken by their staff

| Industry Cluster | Yes | | No | | Don't know | | Sample base |
|--|-----|-----|----|-----|------------|----|-------------|
| | n | % | n | % | n | % | n |
| Farming | 40 | 36% | 67 | 60% | 4 | 4% | 111 |
| Other land management & production | 55 | 71% | 23 | 30% | 0 | 0% | 78 |
| Animal health & welfare | 51 | 86% | 7 | 12% | 1 | 2% | 59 |
| Environmental industries | 39 | 85% | 7 | 15% | 0 | 0% | 46 |
| Environmental & Land-based sector (weighted) | | 48% | | 50% | | 2% | 294 |

Table notes: Filtered out businesses not having provided training in past 2 years

n = number of responses

In contrast, the animal health and welfare cluster reported the highest proportion of businesses that have funded their staff members’ last training themselves, 86% of businesses reported this. The other non-farm clusters reported similarly high proportions of businesses that funded their employees’ last training activity (environmental industries, 84.8%, other land management and production 71%).

A number of plausible inferences can be drawn from this data, that the non-farm businesses have a greater need for training (which is supported in data tables in the skills chapter); that non-farm businesses are simply more willing to pay for training than farm businesses; or that fewer opportunities are available to non-farming businesses to gain funding assistance and so therefore self-fund their staff training.

Of those environmental and land-based businesses that have at least part-funded their employees training over the previous 2 years, 57.4% of businesses spent under £1,000 during that period. Only 1.7% of businesses reported having spent nothing on training, and having had all staff training publicly funded.

According to data from the 2008 Northern Ireland Skills Monitoring Survey⁸⁸ the average annual employer investment in training is equivalent to £2,000⁸⁹ per employee across other non-agricultural sectors. This equates to an average of around £34,000 spent on training per annum per training business. Although this data is not robustly comparable to the environmental and land-based data, the implications are that the sector currently lags some way behind in training expenditure in relation to the other sectors.

Table 5.5 Expenditure on training at sector level over last 2 years

| Amount spent on staff training over last 2 years | Environmental & land-based sector |
|--|-----------------------------------|
| | % |
| Below £100 | 15.6 |
| £100 - £249 | 9.7 |
| £250 - £499 | 17.0 |
| £500 - £999 | 15.1 |
| £1,000 - £4,999 | 17.8 |
| £5,000 - £9,999 | 0.7 |
| £10,000+ | 1.4 |
| None, all training has been publicly funded | 1.7 |
| None, no money has been spent on training | 1.7 |
| Don't know | 17.8 |
| Refused | 1.6 |
| Total | 100.0 |

Table notes: Gross weighted data

Sample base of 163 (only businesses that had provided training in the past 2 years)

*Data not available at cluster level due to respective sample size <50

88 IFF Research (2009), Northern Ireland Skills Monitoring Survey, Department for Employment and Learning

89 this compares to £3,125 per employee in England (NESS 09)

5.2 Views on Training – does training meet business needs?

The survey also included questions to assess the attitudes of respondents towards training. Figure 5.1 presents the views of businesses on a number of issues where respondents were asked to rate their level of agreement to related statements.

Figure 5.1 Business views on training

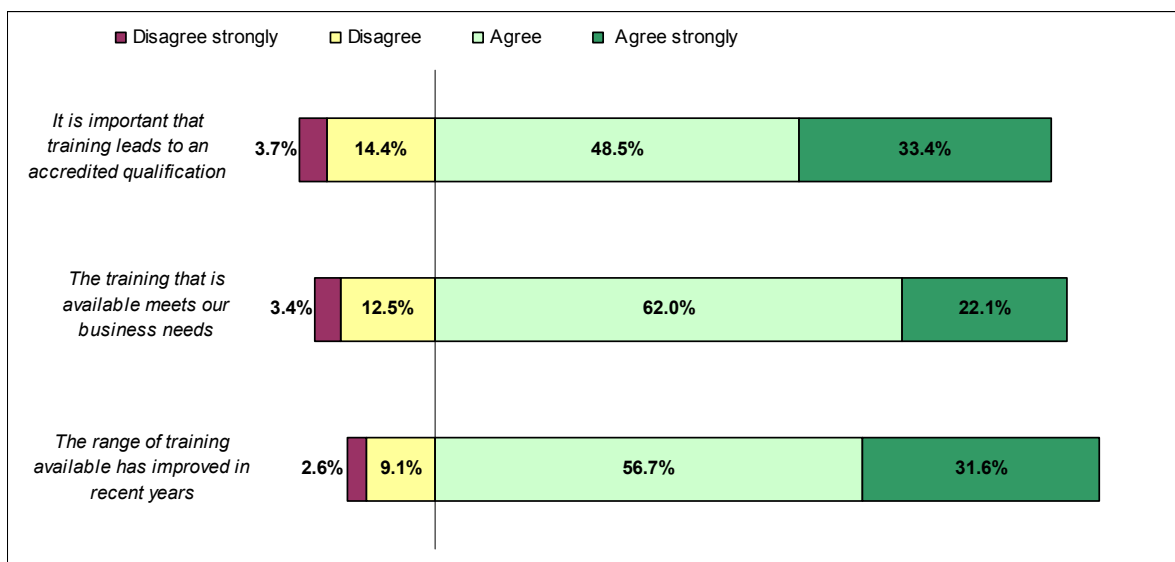


Figure obtained from gross weighted data (Excludes 'Don't know' responses)

Unweighted sample bases for each statement: 837 (training leads to accredited qualification), 768 (training meets business needs) and 802 (training has improved in recent years).

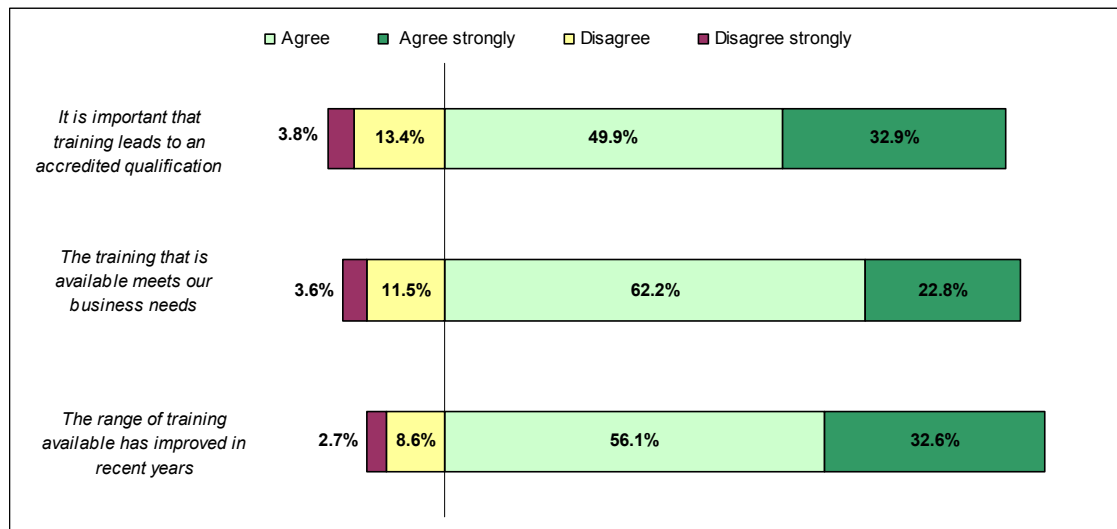
There were high levels of agreement to each of the statements:

- 81.9% agreed (of which 33.4% agreed strongly) that it is important that training leads to an accredited qualification
- 84.1% agreed (of which 22.1% strongly agreed) that training that is available meets our business needs
- 88.3% agreed (of which 31.6% strongly agreed) that the range of training available has improved in recent years

Figure 5.2 shows that the views of farming business owners on training did not really differ from those for the sector as a whole.

Figure 5.2 Business views on training (farming cluster)

Figure obtained from gross weighted data (Excludes 'Don't know' responses)



Unweighted sample bases for each statement: 536 (training leads to accredited qualification), 497 (training meets business needs) and 522 (training has improved in recent years).

Although a large proportion of employers agreed that the training available meets their business needs and that it had improved within recent years, many employers said gave a Don't Know response (don't know responses have been excluded in the analysis). During focus group discussions it was highlighted that many farmers are unaware of what training is available to them and the quote below summarises the majority view,

"A lot of farmers aren't ignoring training and courses, they don't even know what's there to ignore."

For this reason it is unsurprising that many employers were unable to express whether they agreed or disagreed with the above statements.

5.3 Barriers to Training

While the attitudinal questions in the previous section shed some light on business views of training generally available in Northern Ireland, questions were also posed as to why more businesses have not provided training. To provide some understanding Figure 5.3 shows the barriers identified by businesses preventing them from providing more training. Of the responses provided, *"the financial cost of training"* was reported most often as a barrier to training (12.4% recorded this response). This was closely followed by *"time is lost through training"* (11.6%). The effect of time lost through training is often magnified within micro businesses that have fewer than 10 employees, which dominate the sector.

Figure 5.3 Barriers to training across the sector – breakdown of total responses



Figure notes: Multiple response format; sample size of 991

The third most frequently reported barrier was simply that all staff were already fully proficient, 10.8% of businesses recorded this response. In these businesses, the need for training was clearly non-existent. Whilst “*all staff are fully proficient*” is not technically a barrier, this result may indicate that a large proportion of business owners do not see the importance of continuous professional development within the workplace and the focus group with farmers also echoed the financial costs and lack of time as key barriers to training, farmers commented, “*As far as paying, farmers don't want to pay for training, they'll either don't pay for it or don't do it.*”

However, other barriers mentioned were the location. Others cited timing and duration of courses and also the lack of awareness of training courses available. Comments ranged from, “*Not as many short courses available as their used to be*” to “*I put my name down in September to do a computer course and they were not running any until January.*” “*Farmers want to be training from October to December, because that's the time of the year that suits them better. Once you come to this time of the year [February] they don't want training.*”

5.4 Views on Providers of Training

The following analyses take a closer look at the training providers used by businesses within the environmental and land-based sector. The section draws on evidence from the Lantra/DARD business survey and provides a headline picture of the key issues.

In viewing the data overall, businesses within the environmental and land-based sector in Northern Ireland have a tendency to use specialist land-based colleges as their training provider. The data in Figure 5.4 reveals that 40% of businesses that had provided training reported using this type of training provider. A further 21% of businesses reported to have used private providers, and 16% used FE colleges.

Differences exist in the type of training provider used by businesses at an industry-cluster level. In particular, farming businesses tend to use specialist land-based colleges (43.3%) more so than businesses from within the other clusters. Only 19% of businesses in animal health and welfare industries reported using these colleges as training providers.

Figure 5.4 Training provider used by businesses

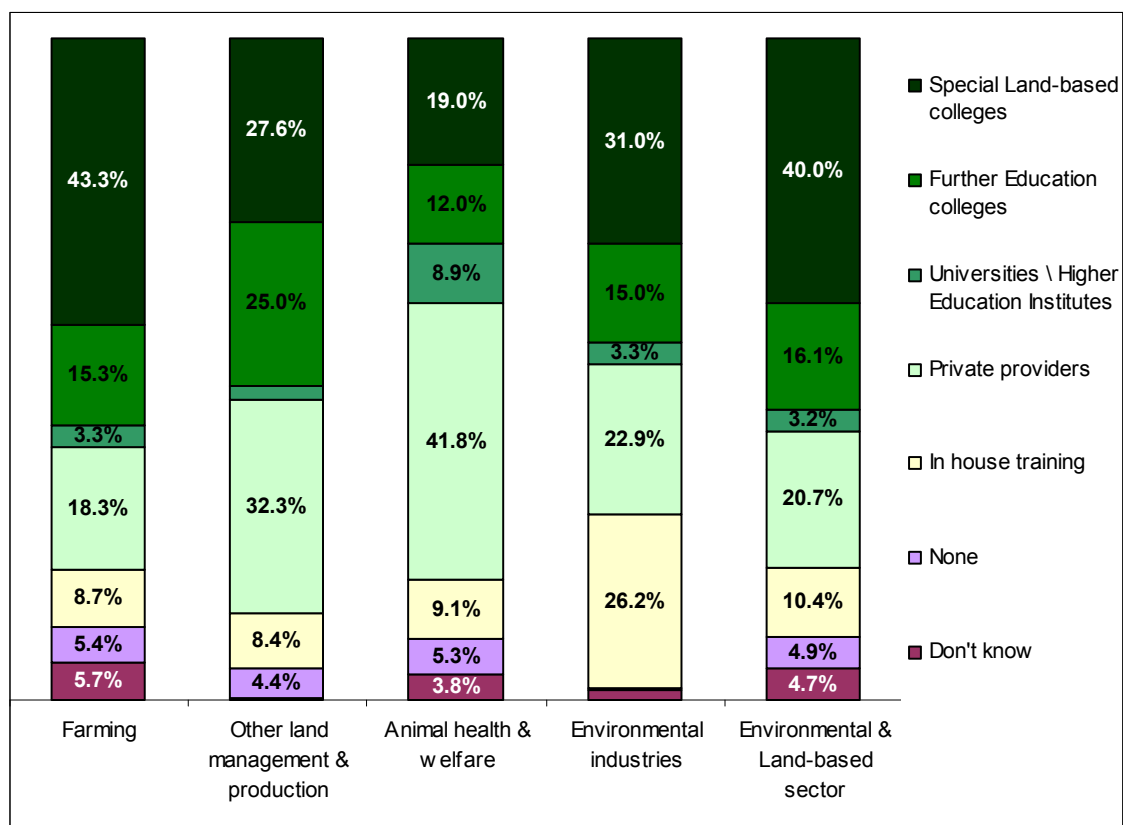


Figure notes: Gross weighted data; sample base of 530 (filtered out those not having provided training at all in over 10 years)

Businesses within the environmental industries cluster make greater use of in-house training compared to businesses within the other clusters. Over one quarter (26.2%) of businesses within the environmental industries cluster reported using in-house training provision. The high proportion of in-house training may be due to the extent of volunteer supervision that occurs within these industries as illustrated by the quote below:

“Operatives on ground level receive basic levels of training in operation of machinery, horticulture skills (delivered in-house, funded by company).”

Figure 5.5 Do providers supply people with the skills required to start work within the environmental and land-based sector?

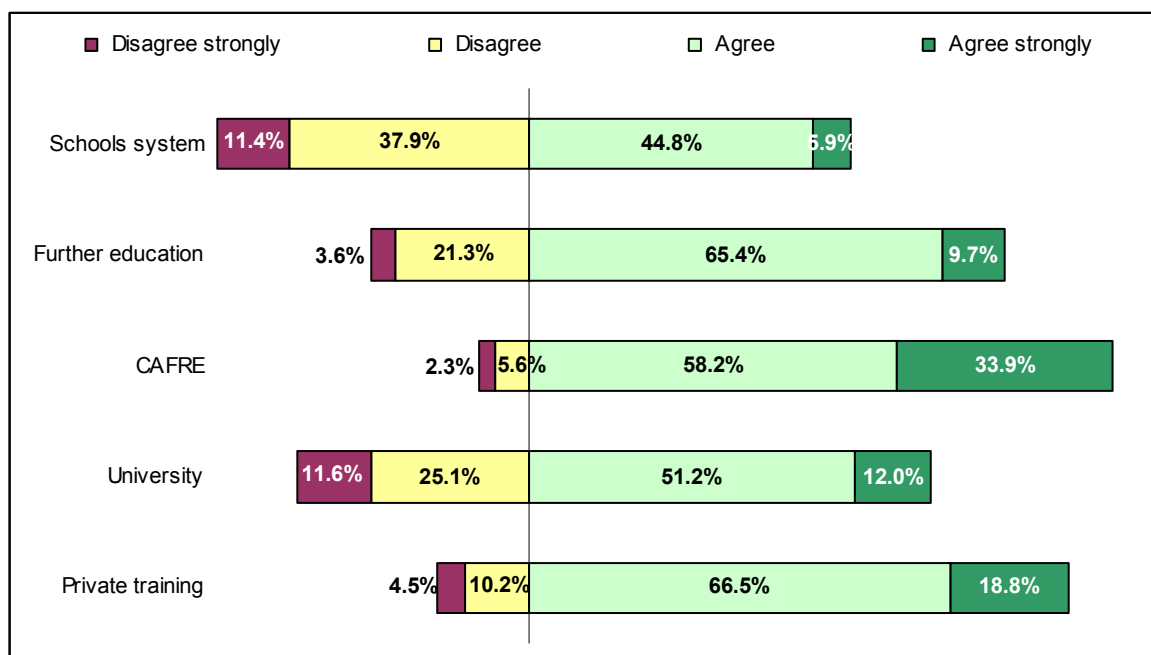
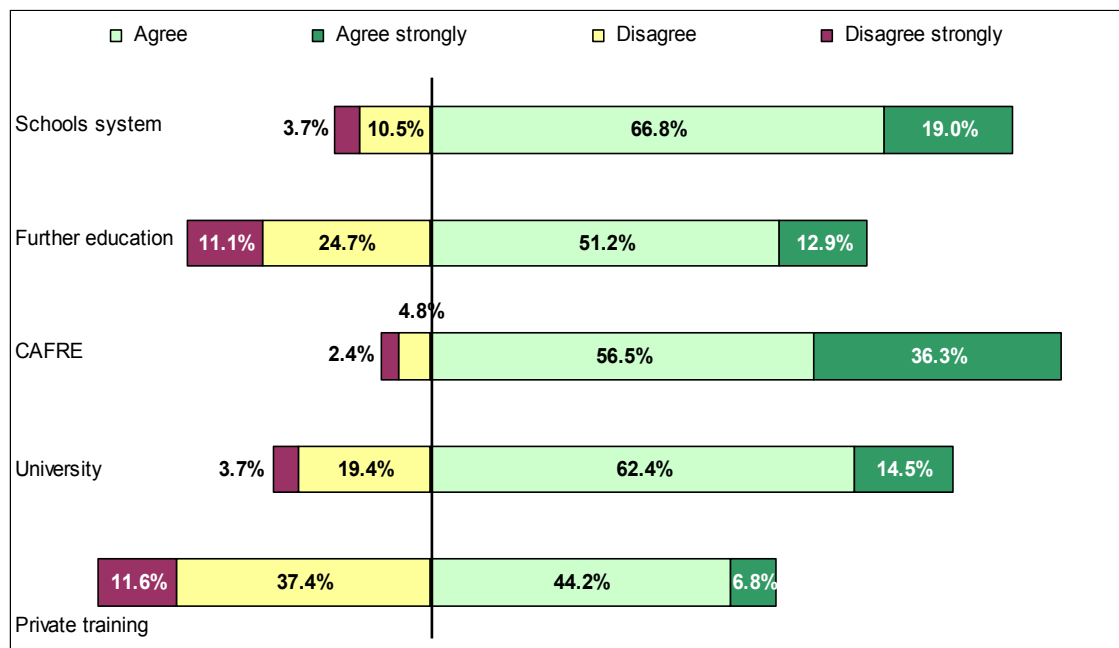


Table notes: Sample base of 991; data weighted to be representative at sector level; the figure excludes responses of 'don't know'.

Figure 5.6 Do providers supply people with the skills required to start work within the environmental and land-based sector? (Farming cluster)

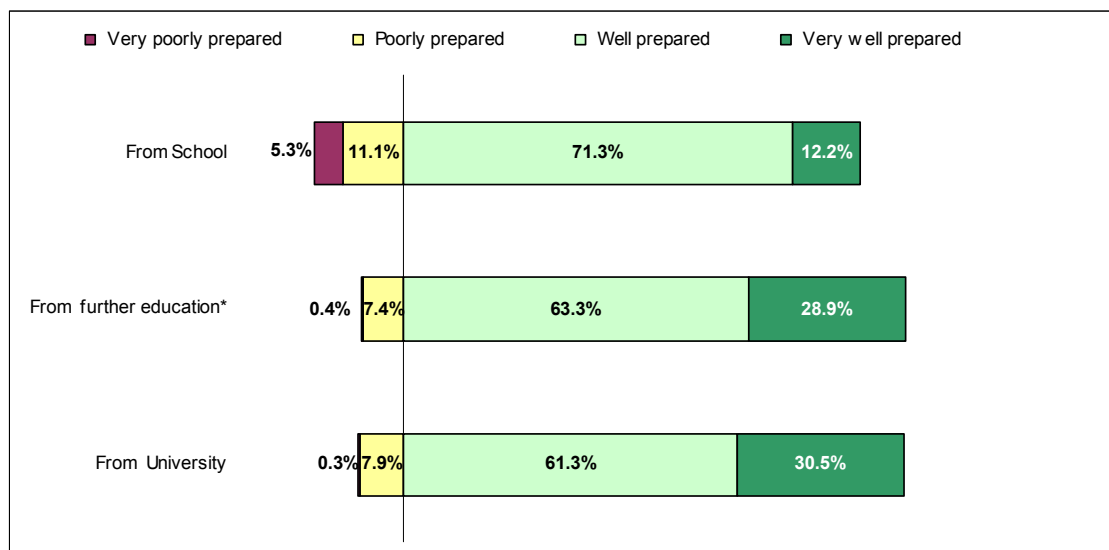


Figures 5.5 and 5.6 show that businesses have different views on the suitability of the skills gained from different parts of the education system. It is perhaps unsurprising that respondents viewed leavers from the school system as least work-ready, given that they have had less education or job-specific training than leavers from other parts of the skills system. In contrast, respondents from farming businesses viewed leavers from private training as least work-ready.

Leavers from CAFRE were very well regarded by respondents, with 92% agreeing they generally supply people with the skills required to work in the sector, less specialist further education providers and universities were not as highly regarded.

Respondents were asked if they had recruited someone into the business as their first job directly after leaving school, further education, or university, and if the answer was yes, how well prepared were the new recruits for the job. Figure 5.7 below shows how businesses that had recruited staff directly from the education system rated their work readiness. Comparing Figure 5.5 with 5.7 it is clear that those businesses that had experience of recruiting from the education system have a more positive view than those that have not.

Figure 5.7 Preparedness of employees recruited directly from education



*Includes CAFRE and private training

Only 3.7% of survey respondents had recruited employees direct from school, with school leavers being viewed as the least well prepared for work. Only a small proportion of businesses that had recruited leavers from further education colleges and universities felt they were poorly prepared for work.

5.5 Key Considerations

There are low levels of training within the sector. A possible explanation for this is that respondents associate the word “training” with formal courses and/or qualifications. Many focus group participants indicate that a lot of skills development in the sector is more informal, through activities like discussion groups or from focus/monitor farms.

Focus group participants also highlighted that they rarely undertook training outside that which is required for compliance, nor did they analyse their own professional needs or that of their business. Formal training courses were generally seen as important for new entrants, but less appropriate for working owners and existing employees. Businesses cite a range of barriers to training. The most commonly cited reasons for not training were cost, time lost to do training and that staff did not require any training, including a lack of information on the courses that are available.

Given the level of skills gaps in the workforce outlined in Chapter 4, improving the skills of the workforce should be seen as an important issue. Programmes to encourage greater training or skills development within the workforce need to be conscious of the barriers that businesses identify. Attention needs to be given to ways to raise the profile and recognition of formal and informal training across the sector, and how to signpost relevant training provisions, which meet business needs, to those who require them.

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6.0 Drivers for Change

This chapter considers the main drivers for change across the sector, including those arising from economic change, the impact of international competition, legislative requirements placed on businesses and wider environmental changes. The drivers were identified and prioritised using two main qualitative methods.

Firstly, views from businesses in the sector were captured in UK-wide focus group discussions as part of Lantra's annual UK assessment of skills needs. In the first instance these groups were industry specific, with meetings involving businesses and trade associations from across the UK, including businesses from Northern Ireland. In addition to this UK-wide activity, a Northern Ireland specific focus group⁹⁰ was held in September 2009 with a mixed group of businesses from across the sector. This group aimed to validate the UK-wide findings as relevant to businesses in Northern Ireland, and to identify any Northern Ireland specific issues.

Secondly, Lantra discussed these findings with key stakeholders such as the Ulster Farmers' Union (UFU), the College of Agriculture Food and Rural Enterprise's (CAFRE) College Advisory Group, Northern Ireland Agriculture Producers' Association (NIAPA), the National Sheep Association (NI), National Beef Association (NI), Association of Landscape Contractors Ireland (ALCI), and DARD as part of further research within the sector during October and November 2009.

The drivers that have been identified include those which will impact on the sector in the short- (next year), medium- (1 to 5 years), and long- (5 years+) term. These are not mutually exclusive timescales as there is overlap in a number of the drivers. The remainder of this chapter provides further details about these drivers and their impact on skills.

The short-term drivers are discussed in the following sections and include:

- Labour supply
- Economic conditions
- Animal health and welfare legislation
- Health and safety legislation
- Changing approaches to land management

⁹⁰ A list of businesses who participated in the Northern Ireland focus group is outlined in Appendix D

6.1 Labour Supply

Many businesses that participated in the focus groups, particularly those within agriculture, identified recruitment and labour supply issues as key concerns affecting them in the short term. There were concerns relating to both labour quality and quantity.

The high average age of farmers in Northern Ireland was discussed, and there were some mixed views on what this might mean in the future. Some felt the high level of natural wastage would present opportunities for new entrants into the industry. Others felt that existing farmers may take the opportunity to expand, by taking over land farmed by those leaving the industry. Whilst this might lead to a decline in the numbers employed overall, this could provide opportunities for more (employed) farm managers to enter the industry.

As outlined in Chapter 3, the sector has an ageing employment profile with 15% of the workforce over 65 years of age. There is a significant demand to replace workers who are expected to retire from the sector over the next 10 years. The Working Futures projections suggest that in Northern Ireland 10,000 new entrants to the sector will be needed over the next 10 years⁹¹.

The age of farm owners is older than the workforce across the sector as a whole. Focus group participants observed that within family businesses there is often reliance on family succession. Where a farm owner continues working this often restricts the opportunities of other members of the family to take more responsibility, and the opportunity to recruit into the industry is limited. Participants felt there was poor succession planning in the industry.

The recession has led to a reduced use of migrant workers (see Section 3.2). The DARD/Lantra employers' survey shows only 2% of businesses have employed a migrant worker at some point over the past 12 months. Production horticulture farms are much more likely to employ migrant workers than other farm types, with 1 in 5 (20%) employing migrant workers in the past 12 months. Within production horticulture, evidence from the survey suggests that around 10% of the workforce are migrant workers. Businesses highlighted that the reduced use of migrant workers was partly because local people were now more willing to work in the sector. In times of high domestic unemployment local populations seem more willing to accept whatever work opportunities become available. In addition, some businesses highlighted alternatives to sourcing labour themselves for each business task, such as the use of specialist contractors. The main reason cited for this was due to the seasonality of the work, perceived as a barrier to recruitment for those looking for permanent recruitment. Many of the agricultural businesses use contractors, many of which also provide their own specialist equipment.

⁹¹ UK Commission for Employment and Skills (2008), Working Futures 2007-2017, Institute for Employment Research

These issues will have an impact on skills within the sector as there will be losses of skills as experienced workers retire from the sector. Businesses are less able to use migrant workers as a short-term solution. Training and skills development will be needed for new entrants and to develop existing workers. Focus group participants also highlighted the importance of improving the image of the sector and attracting good quality young entrants. They highlighted the need to engage with the NI Careers Services and the pre-16 education curriculum as important in this respect.

The labour supply issues affect the existing workforce as well as new entrants. If the skills of existing workers are developed through continued professional development (CPD) they may be able to fill vacancies higher up the business when they arise and therefore addresses the issues of succession planning, highlighted earlier in the report.

6.2 Economic Conditions

Much of the sector operates within a policy-driven framework, whether by UK governments, the European Union or the World Trade Organisation. The evolution of markets both within the EU and globally, and increased competition and changes in consumer behaviour, mean that markets for products and services are constantly being re-defined.

Within Northern Ireland the farming sector is export oriented. DETI highlight that the food and drink industry export £600 million of products to markets outside the UK. When sales to Great Britain of more than £1.5 billion are included, the proportion of goods sold to customers outside Northern Ireland rises to more than 60%⁹². Given this, farmers have to compete with producers elsewhere in the world. The sector has become more sensitive to fluctuations in commodity prices and currency exchange rates, which have a direct impact on farm incomes.

Businesses in the sector are adjusting to changing levels of consumer spending. The Northern Bank forecast there was a 2.9% decline in consumer expenditure during 2009 in Northern Ireland⁹³, with the Consumer Confidence Survey finding that 32% of Northern Ireland residents planned to spend less during the next 12 months⁹⁴.

The economic conditions described above were also echoed within the Lantra/DARD survey. When asked, "What challenges do you anticipate your business will face over the next 12 months?" businesses stated that economic conditions (e.g. producer prices, market conditions) are the biggest challenge they are going to face (55.4% of businesses). This was followed by "cash flow" (30.2%) and "availability of finance" (22.4%).

92 Department of Enterprise Trade and Industry (2009) see: <http://www.northernireland.gov.uk/news/news-deti/news-deti-october-2009/news-deti-071009-export-focus-helps.htm>

93 Northern Bank Quarterly Economic Overview (October 2009)

94 Northern Bank Consumer Confidence Survey (June 2009)

In the focus groups a number of businesses, notably in floristry and fencing highlighted that the recession has led to falling consumer spending on such discretionary products. These industries are responding to this situation by diversifying into different product areas and by marketing their services more effectively, with the associated development requirements for skills in the area of chosen diversification and for sales and marketing as examples.

However, the picture is complex with some businesses in amenity horticulture and garden retail highlighting increased spending, resulting in them placing a greater emphasis on the provision of high quality services.

Agricultural businesses are operating in an increasingly global marketplace. Subsidy payments for production no longer exist and Single Farm Payment is now received where farms meet cross compliance standards. Looking forward, many farmers expect that there will now be a gradual removal of financial support within the post-2013 Common Agricultural Policy reforms. This could present a major challenge for parts of the sector. For example, the Red Meat Task Force found that the Northern Ireland Beef and Sheep industry was making a loss of over £200 million per annum on full production costs, with the majority of producers using their Single Farm Payment to cover the costs of loss making production⁹⁵.

In the light of this, business management skills (such as business planning, marketing and sales, customer handling and financial planning) will therefore be essential to ensure that agricultural businesses are profitable and sustainable. Successful businesses will need to formulate and implement effective business strategies. Businesses will need to become more skilled at understanding the market through collecting, accessing and analysing information on consumer demand and responding more effectively to core customer's demands.

6.3 Animal Health and Welfare

Animal health and welfare has become increasingly important to owners, veterinary surgeons, para-professionals and animal care occupations in the livestock industry, consumers, members of the public and governments.

The Northern Ireland Animal Health and Welfare Strategy 2006⁹⁶ set the framework for managing animal health and welfare. The strategy is mainly concerned with farmed livestock; however it encompasses other animals including wildlife and companion animals. Northern Ireland Animal Health and Welfare legislation differs from elsewhere in the UK as it has a focus on agriculture, whereas in the other nations a new duty of care affects all owners and carers of a wider range of animals.

⁹⁵ Northern Ireland Red Meat Task Force (2007), Full Report

⁹⁶ DARD (2006), Northern Ireland Animal Health and Welfare Strategy

Focus group participants highlighted that legislation in Northern Ireland echoed the fact that it has been more focused on the agricultural sector. For example, the Welfare of Farmed Animals (NI) Regulations 2000 set down minimum standards for keeping farm animals and contains specific requirements such as inspections, record keeping, freedom of movement, buildings and equipment and the feeding and watering of animals. The Northern Ireland Single Farm Payment Cross Compliance⁹⁷ also sets Statutory Management Requirements (SMRs) across a number of areas including animal health and welfare.

More recently, an All-Island Animal Health and Welfare Strategy⁹⁸ has been developed with the aim of ensuring the free movement of animals throughout all parts of the island. In addition, a new European Union regulation was introduced in 2007 on the protection of animals during transportation⁹⁹. This regulation covers anyone who takes animals on a journey in connection with an economic activity. It requires that journeys are properly planned, those handling animals are trained and competent, that animals are fit to travel and that water, feed and rest are given to animals as needed.

As well as being responsive to the requirements of new legislation, businesses have to manage risk associated with animal diseases. Better control of disease is seen as important. For instance Bovine Tuberculosis is a long-standing problem that affected 7% of herds in Northern Ireland in 2007¹⁰⁰. More recently diseases such as blue tongue and avian flu have emerged in Northern Ireland.

These factors have an impact on skills within the sector. Businesses are having to ensure that staff are suitably competent or receive training in the skills associated with animal health and welfare, e.g. the application of veterinary medicines which comply with the legislative regulations. This might involve staff having their existing competence recognised or attending formal training courses. There will be a need for continuing professional development relating to animal handling and care, disease identification and control, risk management associated with animals and bio-security.

97 DARD (2005), Cross-Compliance Verifiable Standards 2005 and 2006

98 See: <http://www.dardni.gov.uk/ahw-strategy-consultation>

99 EU Animal Welfare in Transport see

http://ec.europa.eu/food/animal/welfare/transport/legislation_coming_en.htm

100 Northern Ireland Audit Office (2009), The Control of Bovine Tuberculosis in Northern Ireland

6.4 Health and Safety

Businesses that participated in the focus groups highlighted that legislation associated with health and safety issues is a key ongoing, short-term driver for training. The Health and Safety at Work (NI) Order 1978¹⁰¹ is the key piece of legislation covering occupational health and safety across the UK. While this legislation is an issue for all industries in the sector, some industries by the nature of the work, receive priority attention from the Health and Safety Executive, particularly agriculture, horticulture and forestry.

Health and safety impacts on skill development in a variety of ways, with legislation requiring staff to undertake training in a range of activities. For instance, pesticide users are required to receive formal training; courses such as the Safe Use of Pesticides (PA1) certificate have been developed, and codes of practice exist. Businesses are also required to ensure staff receive training in the use of chain-saws.

At a business level, risk assessment has become increasingly important. Businesses are required to produce risk assessments and they need the skills to do this effectively. Some focus group participants highlighted that the industry is seen as high risk due to high levels of lone working and working with animals. In addition, they highlighted the risks associated with running a family business; in particular, the Health and Safety Executive (NI) highlighted the number of deaths to children and older people as a result of machinery operation.

6.5 Changing Approaches to Land Management

Farmers in the focus groups felt they were increasingly managing the land in a way to ensure their farms support and protect wildlife and bio-diversity. Farmers are increasingly involved with environmental stewardship and there is both compulsory and voluntary action being taken to protect water quality and the farmland birds, plants and animals typical of the local landscape.

In Northern Ireland, farmers claiming the Single Farm Payment (SFP) and other direct payments are responsible for understanding and meeting cross-compliance requirements relating to the environment. In addition to this, farmers may choose to join agri-environmental schemes through which they receive extra payments for providing and protecting such “public goods” as our environment.

¹⁰¹ See http://www.hseni.gov.uk/index/information_and_guidance/legislation.htm

In Northern Ireland the Countryside Management Scheme¹⁰² is a key agri-environmental scheme that provides financial support to farmers and land-owners for adopting farming practices that enhance the countryside by improving bio-diversity or water quality, enhancing the landscape or improving soil quality. The number of farmers participating in agri-environmental schemes has grown steadily since the early 1990s, with close to 13,000 participants in 2008¹⁰³.

Participants in the focus groups highlighted that improved grassland management will be a key way in which the livestock industry can improve its competitiveness in the future. They highlighted that the general standard of grassland management in Northern Ireland was poor with few farmers viewing grass as a crop. Good grassland management would allow for a longer grazing season of high quality feed at a low cost. One farmer mentioned that they had seen farmers in New Zealand using clover within pastures as it fixes nitrogen in the soil, reducing the need for nitrogen fertilisers.

This means that skills relating to managing land in a more environmentally sustainable way will become increasingly important. Skills associated with understanding soils and managing grassland effectively will also become more important. Farmers within the focus groups felt that there were a number of changes occurring in this area, but that there was a lack of advice and guidance on how to take appropriate action on their land.

The medium-term driver is discussed in the following section and includes:

- Technology change

6.6 Technology Change and Knowledge Transfer

The discussions with key stakeholders identified technology change, and knowledge and technology transfer (KTT) from science and research through to everyday practice as a key driver for skills and business development within the industries. A number of strategies currently support the demand for evidence-based research, which supports and provides the stimulus for innovation. The DARD Evidence and Innovation Strategy¹⁰⁴ provides an overarching framework for the all DARD-funded research that promotes innovation in the agri-food, farming, forestry and other rural businesses. Education and lifelong learning also play a pivotal role in delivery the strategy's key goals. DARD's Evidence and Innovation strategy is also linked to the Regional Innovation Strategy¹⁰⁵, which highlights the importance of STEM (Science, Technology, Engineering and Maths) skills within the economy as a driver for this innovation.

102 <http://www.ruralni.gov.uk/index/environment/countrysidemanagement/schemes/nicms.htm>

103 DARD Service Delivery Group, Countryside Management Branch (2008), Annual Report

104 http://www.dardni.gov.uk/index/strategies-reports-accounts/dard-research-section/dard-evidence-and-innovation-strategy_2009-2013.htm

105 Department for Enterprise, Trade and Investment (2008), Regional Innovation Strategy for Northern Ireland, Action Plan 2008-2011

KTT involves the dissemination of new techniques in areas such as food production, bio-diversity, marine management, animal health and welfare and environmentally sensitive land management. While none of the businesses that participated in focus groups identified this as a single overarching driver, they did identify specific developments, which will impact on skills in the medium to long term. For example, some of the issues highlighted were:

- Introduction of environmentally sustainable farming practices
- Precision farming – use of Global Positioning Satellites (GPS), soil mapping, yield mapping, variable rate fertilisers
- Hydroponics
- New methods of crop protection/disease control
- Bio-energy, anaerobic digestion
- Improved recording and interpretation of data on plant and animal growth

The UK Government Food Strategy (Food 2030)¹⁰⁶ indicates there will be a doubling of food research spending. Ensuring that this research is of high quality and outcomes are transferred into training and development solutions is key, to facilitate KTT. Policy should support providers to apply the research to support take up, modification and use of this knowledge by businesses. This will enable the sector to develop processes and products that will support the sustainability of sector businesses.

The long-term drivers are discussed in the following sections and include:

- Climate Change
- Food security
- Energy and fuel security

6.7 Climate Change

Climate change is having an effect on the processes and operations of the sector, although businesses have a degree of uncertainty about what the future impact will be on them. Participatory businesses in Northern Ireland who are involved with land management, such as agriculture and environmental conservation, were most likely to identify issues linked to climate change.

Although overall greenhouse gas emissions from agriculture have fallen by 19% over the past 10 years, the sector is a major contributor of greenhouse gases, with agriculture representing 21% of total greenhouse gas emissions in Northern Ireland; a significantly higher proportion than the UK average of 7%¹⁰⁷. Businesses recognise that adoption of more environmental sensitive approaches to production will be required.

¹⁰⁶ HM Government (2009), Food 2030

¹⁰⁷ AEA Technology (2009), Greenhouse Gas Inventory Report (for Department of Energy and Climate Change)

In addition, active management of the natural environment can underpin many facets of a low carbon economy and mitigate the impact of climate change. Carbon sequestration involves capturing and storing carbon for the long term naturally in soils, vegetation and the oceans. These “carbon sinks” play a vital role in regulating the climate. The Northern Ireland Environment Agency¹⁰⁸ highlights that better management of our habitats, peat lands, woodlands, agricultural land and seas can play a role in mitigating climate change; this presents significant opportunities to the Northern Ireland forestry sector.

As well as taking measures to mitigate climate change there will also be changes brought about by the need to adapt to the changing climate. The Northern Ireland Environment Agency¹⁰⁹ highlight that over the next century average temperatures may rise by 3°C or more, summer rainfall may be reduced by 50% while winters may be 25% wetter. In agriculture, this will impact on the types of crops that can be grown and their location. For instance, they suggest that artificial irrigation systems will need to be introduced, particularly for crops such as potatoes in the summer months. The livestock industry will also be affected as grassland yields could also decline, with reduced summer rainfall, and milder winters could lead to an increase in pests and diseases.

These changes will impact on skills within the sector. Businesses across the whole sector will have to be managed in an environmentally responsible manner. There will be specific skill requirements associated with the management of resources that can have a damaging impact on the environment, such as nitrates. In addition, businesses involved with land management may have to adapt what they grow and how it is grown. Further investigation into specific skill development requirements and associated training relating to carbon sequestration, water management, nitrous oxide and methane production may be required.

6.8 Food Security

The UK is currently around 60% self-sufficient for food production¹¹⁰. As a country, we are reliant on supplies of imported food, and recently the security of these supplies have been scrutinised. The UK Government Food Strategy¹¹¹ highlights the need to raise production levels in a sustainable way. This is required due to global population growth, economic growth in emerging economies, and changing dietary patterns. There will also be changes at a global level due to finite land availability, climate change and the continuing availability of key resources.

¹⁰⁸ Department of the Environment, Environment and Heritage Service, Scotland and Northern Ireland

Forum for Environmental Research (2007), Preparing for a Changing Climate in Northern Ireland

¹⁰⁹ Department of the Environment, Environment and Heritage Service, Scotland and Northern Ireland

Forum for Environmental Research (2007), Preparing for a Changing Climate in Northern Ireland

¹¹⁰ Defra, Agriculture in the UK (2008)

¹¹¹ HM Government (2009), Food 2030

While there are scant publications that relate specifically to food security within Northern Ireland, the issue is of significant importance to local food production businesses and the wider economy. In total the farming and food processing sectors contribute £4.1 billion to the Northern Ireland economy, of which beef and sheep meat make up 27% (£1.1bn). Of the 450,000 cattle used for beef production per year, 15% are consumed in Northern Ireland, 70% consumed in GB and 15% exported, primarily to France, Holland and the Republic of Ireland. Of the 850,000 sheep produced, 15% are consumed in NI, with the remainder exported equally to GB, France and the Republic of Ireland. In this context the industry contributes to a UK self sufficiency of 80% for beef and 90% for lamb¹¹².

The Northern Ireland agri-food sector is very export orientated. Sales of Northern Ireland food and drinks products to external markets (outside of NI), totalled £2,101 million in 2008. Export sales, which are sales from Northern Ireland to markets outside the United Kingdom, were worth £876.4 million in 2008. External sales represented 67.2% of total processing sector sales in 2008, with sales to the Republic of Ireland being the largest export market for the sector, recording sales worth £516.2 million in 2008¹¹³.

Livestock businesses within the focus groups highlighted that government moves to increase self-sufficiency may benefit parts of the sector. The issues and business drivers around food security are becoming much more important. For instance, following the outbreak of diseases, such as bird flu and blue tongue, the issue of bio-security is now paramount. Businesses need to be able to identify and manage risk. Consumers expect high standards, increasing requirements around traceability and robust systems in the food chain, which impact on primary producers.

As a result of food security, businesses in the sector have to adjust to the following influences:

- The increasing drive for economic, environmental and social sustainability in the farming and food sector
- Consumer behaviour – demands for greater convenience, healthy lifestyles, a wide range of options
- Food quality, traceability and quality assurance
- Globalisation, developments in trade and markets and (sustainable) supply chains

The skills implications of maintaining or increasing production levels are varied. For instance, the sector will need to be sustainable and profitable, so many of the skills identified as drivers associated with economic conditions are also important here. Please refer to table 6.10 for further clarification.

112 <http://www.lmcni.com/industry/publications/LMCFactsLeaflet.pdf>

113 http://www.dardni.gov.uk/publication_2008_2_doc

6.9 Energy and Fuel Security

In 2009 electricity prices for Northern Ireland consumers were up to 29% more expensive than in the rest of the UK¹¹⁴. The price of energy and fuel and its long-term sustainability were areas of concern for businesses within the focus groups. Not only are the operating costs of the sector adversely affected by this global market change but the sector is also a source of potential solutions.

The Northern Ireland Strategic Energy Framework 2009¹¹⁵ sets a target of 40% of electricity production from renewable sources by 2025. The framework highlights bio-energy as a source that is currently under-utilised and highlights the formation of an Inter-Departmental Working Group (IDWG) on bio-energy as a key mechanism to increase its use.

Bio-mass has three main sources – conventional forestry management, agricultural/energy crops (such as willow grown as short rotation coppice (SRC) or *miscanthus* grass) and bio-degradable waste. The UK Renewable energy strategy¹¹⁶ concludes that using bio-mass to generate heat and electricity can be cost-effective and will make a significant contribution to our greenhouse gas targets. The strategy indicates that around 30% of the UK renewable energy target could come from bio-energy for heat and power, rising to around 50% if bio-fuels for transport are included. In addition, it can provide the feedstock for a wide range of sustainable low carbon renewable materials and products.

As a result of energy and fuel security, businesses in the sector have to adjust to issues such as energy efficiency and the potential move to supply alternative and renewable energy sources. For instance, anaerobic digesters are one technology that can turn food and agricultural waste into energy, and provide a replacement for manufactured fertilisers in the form of digestate.

There are a range of skills issues associated with this. The research community, including academics, government, research councils and the private sector will provide the knowledge to enable technical solutions. There also needs to be improved transfer of knowledge to farms to ensure understanding of the technology and its use, as this knowledge becomes available.

For bio-fuels, farmers will need to develop knowledge of the agronomy of different crops specifically for bio-fuels. There will need to be continued development of harvesting and processing machinery, as well as training on the use of such machinery.

114 Department for Enterprise, Trade and Investment Northern Ireland Strategic Energy Framework 2009

115 Department for Enterprise, Trade and Investment Northern Ireland Strategic Energy Framework 2009

116 Department for Energy and Climate Change (2009), UK Renewable Energy Strategy

6.10 Summary of skill Issues against drivers for change

| Drivers for change | Main issues | Impact on skills and business requirements |
|--|--|---|
| Labour supply | <ul style="list-style-type: none"> • Attracting new entrants of all ages • Succession planning by industry • Providing opportunities for career progression and development • Influencing migration policy and operation of control mechanisms | <ul style="list-style-type: none"> • Effective marketing of careers • Better careers advice and guidance for all • Proper recognition of competence for all • Integrated frameworks to support lifelong learning and CPD |
| Economic conditions | <ul style="list-style-type: none"> • Impact of the recession • Understanding and responding to changing consumer demand • Customer relationship management | <ul style="list-style-type: none"> • Business advice, guidance and support • Business management skills • Sales and marketing • ICT |
| Animal health and welfare | <ul style="list-style-type: none"> • Higher standards now required of all people handling animals • Legislation relating to animal transportation | <ul style="list-style-type: none"> • Development of Integrated CPD across all practitioners • Recognition of competence • Skills relating to animal handling and care, disease control and disease identification and bio-security |
| Health and safety | <ul style="list-style-type: none"> • Legislative requirements • Safer working environment • Reduction in occupational hazards to minimise ill health | <ul style="list-style-type: none"> • Awareness raising, knowledge of requirements and how to comply • Improved learning provision in terms of continual professional development • Recognition of health and safety competence |
| New approaches to land management and environment | <ul style="list-style-type: none"> • Common Agricultural Policy, Single Farm Payments and cross compliance • Water Framework Directive • Nitrate Vulnerable Zones | <ul style="list-style-type: none"> • Developing skills for environmentally sensitive land management • Improved grassland management skills required • Knowledge of legislation and how to comply |

| Drivers for change | Main issues | Impact on skills and business requirements |
|---|---|---|
| Knowledge transfer and technology change | <ul style="list-style-type: none"> • Knowledge transfer from research to practical application • Inclusion in training and development programmes | <ul style="list-style-type: none"> • Research into new methods and processes • Technology transfer • Business development • New technologies • Higher level technical skills for new production methods • Need to revise training provision |
| Climate change | <ul style="list-style-type: none"> • Reduction in greenhouse gas emissions • Need to adapt to changing climate in the longer term | <ul style="list-style-type: none"> • Adoption of methods to mitigate climate change, such as low carbon farming • Farms having to respond to changes in the climate • Respond to specific skills/re-skilling issues in relation to carbon sequestration, water management, nitrous oxide and methane production. |
| Food security | <ul style="list-style-type: none"> • Food 2030 strategy, increased government interest in food security • Food quality, traceability and quality assurance • Consumer behaviour – demands for greater convenience, healthy lifestyles, wide range of choice • Developments in trade and markets and supply chains • New approaches to land management i.e. conflicting priorities for land use | <ul style="list-style-type: none"> • Business management skills • Risk management • Business advice, guidance and support • Information and communications technology • Supply chain management • Contract management and negotiation |
| Energy and fuel security | <ul style="list-style-type: none"> • Costs to business of fuel and energy • Use of waste as a resource, e.g. Anaerobic digesters • Sector as a supply of bio-mass and bio-fuel | <ul style="list-style-type: none"> • Research community to provide knowledge • Knowledge of agronomy of different crops • Development of bio-mass supply chains |

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7.0 Employment Trends

Chapter Summary

- Total employment across the environmental and land-based sector is expected to remain steady over the next 10 years. The two sets of published projections agree that there will be little change in the overall level of employment. They differ in terms of the direction of change, with the Institute of Employment Research suggesting a decline of around 1000 jobs^a, and Oxford Economics showing an increase of up to 600^b
- The nature of employment will continue to change. There will be a growth of employment in higher level roles such as managers, professionals and associate professionals, in contrast elementary occupations and other low level roles are expected to fall

This chapter examines how employment in the sector is expected to change in the future. Two key sources of information are reviewed. Firstly, evidence from the Working Futures¹¹⁷ projections developed by the Institute of Employment Research (IER) on behalf of the UK Commission for Employment and Skills. These projections cover a 10-year period from 2007 – 2017. They are based on Official Standard Industrial Classifications (SIC 2003). Data for Northern Ireland is available for the environmental and land-based sector (as defined by SIC)¹¹⁸ and for the agriculture, forestry and fishing sector.

The projections are based on a continuation of past patterns of behaviour and performance. Therefore they indicate what is likely to happen and should not be regarded as what will necessarily happen.

It should be noted that the Working Futures model was run during February 2008 when the “credit crunch” had started but before the UK entered recession. We have not included short-term numerical projections of the impact of recession; rather we discuss the impact of recession on the sector next, before analysing the long-term employment projections.

a UK Commission for Employment and Skills (2008), Working Futures 2007-2017, Institute for Employment Research

b Department of Employment and Learning (2009), Forecasting Future Skill Needs in Northern Ireland, Oxford Economics

117 UK Commission for Employment and Skills (2008), Working Futures 2007-2017, Institute for Employment Research

118 The sector is not well defined by SIC therefore it is only possible to provide a picture for the changes occurring within some of the environmental and land-based industries, namely agriculture (including production horticulture and agricultural services), forestry, aquaculture, zoos and nature reserves and veterinary nursing and ancillary activities.

Secondly, a more recent set of projects were developed by Oxford Economics on behalf of the Department for Employment and Learning within the report: “Forecasting Future Skill Needs in Northern Ireland (2009)”¹¹⁹. These projections look at the flow of people from education into employment and provide two alternative scenarios for the future. The projections are only available for the agriculture, forestry and fishing sectors (see Section 7.3).

7.1 Impact of Recession

To develop an understanding of the issues facing businesses, the views of businesses in the sector were captured in the industry specific focus groups held across the UK. In addition to this UK-wide activity, a Northern Ireland specific focus group¹²⁰ was held in September 2009 with a mixed group of businesses from across the sector. This group aimed to validate the UK-wide findings in the context of Northern Ireland, and to identify Northern Ireland specific issues.

The environmental and land-based sector has a diverse spread of 17 industries. Although these industries share many common characteristics the recession has not affected all industries in the same way. In this section we outline some of the ways industries have been affected.

Agriculture

The businesses we spoke to within agriculture did not highlight major negative impacts of the recession. Indeed some businesses identified positive effects, such as finding it easier to recruit workers from the domestic labour market, which is summed up by the quote below:

“With the downturn in the building industry there are people now considering agriculture which years ago wouldn’t.”

Food and drink is one of the few areas in which the recession is likely to present positive opportunities. Demand for food is non-cyclical and generally speaking, the weakening of domestic currency (£Sterling) relative to the rest of the world tends to reduce import pressures on Northern Ireland farmers (i.e. the cost to import produce effectively increases) and similarly elevates export prices. However, the realities are often different and some parts of the sector have not benefited in this way. For instance DARD statistics show that milk prices declined during 2008 and the first half of 2009, although the most recent figures show a recovery between July and October 2009.

¹¹⁹ Department of Employment and Learning (2009) Forecasting Future Skill Needs in Northern Ireland, Oxford Economics

¹²⁰ A list of businesses who participated in the Northern Ireland focus group is outlined in Appendix D

The economic crisis is changing consumer attitudes. Expensive organic and fair-trade products are being abandoned as the economic downturn takes hold. For example, organic bread sales fell by 31% between February 2008 and 2009¹²¹. Consumers are seeking cheaper, better value-for-money alternatives to organic lines.

“Farming Life” reported that during 2009 farm borrowing in the Northern Ireland agricultural sector reached £902 million¹²², a 5% increase year on year. Although production in the sector should remain stable over the coming year, the servicing of these debts is a concern as the cost of credit is increasing. Businesses in the focus group reported that many in the sector were avoiding large machinery purchases and that some farmers face further difficulties in obtaining bank loans.

Trees and Timber

The Northern Ireland Forest Service Annual Report¹²³ from July 2009 shows that the sector has exceeded targets relating to planting, timber sales and profitability. Although businesses elsewhere in the UK report falling demand due to the recession and slowdown in the house-building market, the industry in Northern Ireland appears to be performing well. Forestry Service sales of timber in 2008/09 stayed at a similar level to previous years, and average prices received increased from £14.04 per m³ for standing timber to £17.27 per m³.

Production Horticulture

Production horticulture businesses within the focus groups reported that the recession had made it easier for them to recruit labour from local populations. Businesses suggest that the composition of the production horticulture workforce is changing. Until recently migrant workers (due in the main to beneficial currency exchange rates) had been in the majority, whilst local workers did not view this type of work favourably. However, given the weakening of the pound this situation has altered. Foreign workers now look upon the industry less favourably because the returns are not as attractive, while in these times of high domestic unemployment local populations seem more willing to accept whatever work opportunities become available.

121 TNS World Panel (2009) UK survey of 25,000 households

122 <http://www.farminglife.com/farmingnews/Agri-borrowings-to-break-1bn.5908748.jp>

123 Forest Service Northern Ireland (2009), Annual Report 2008-2009

Landscape

The housing construction market has experienced a downturn. In Northern Ireland the volume of new build starts fell 46% between 2007-8 and 2008-9¹²⁴. They reached a low of 1,217 new starts in the fourth quarter of 2008. Businesses we spoke to highlighted that the consequence of this has been felt doubly by the landscape industry. Firstly, the availability of work itself has declined due in part to this slowdown in housing developments. Secondly, the shrinkage in employment within construction has displaced a number of workers and labourers (both skilled and unskilled) into neighbouring industries, such as landscaping. Businesses within the focus group suggested that this displacement has resulted in a proliferation of unqualified operatives entering the industry. These now threaten to undercut higher skilled operatives in order to secure what little work is available.

Fencing

Like the landscape industry, businesses in fencing highlight the link between their industry and demand in the construction sector. Participants in the focus groups suggest that there has been a reduction in the number of large contracts available, although conditions have improved during 2009. This is reflected in the reduction of turnover reported by many businesses in the industry. Research conducted by Lantra in November 2009 found that 4 out of 11 surveyed fencing businesses in Northern Ireland experienced a decline in turnover during the previous 12 months; 9 of the 11 highlighted “economic conditions” as their main business concern¹²⁵.

Floristry

During the economic downturn Northern Ireland is witnessing a decline in discretionary spending by households. The Northern Bank forecast there was a 2.9% decline in consumer expenditure during 2009 in Northern Ireland¹²⁶. This directly affected the floristry industry. All the businesses we spoke to within the floristry sector highlighted that they have been severely affected by the recession. Many businesses are closing shops and making staff redundant.

Environmental Conservation

Businesses within environmental conservation, as a largely government-funded sector, expect there may be some cutbacks in their level of funding as public spending reduces. Many businesses currently receive short-term funding, and expect to have to release staff who are employed on fixed-term contracts.

¹²⁴ Department for Social Development (2009) Northern Ireland Housing Statistics 2008-2009

¹²⁵ Lantra (2010) Investigating skills in the fencing industry in Northern Ireland, Department of Employment and Learning

¹²⁶ Northern Bank Quarterly Economic Overview, October 2009

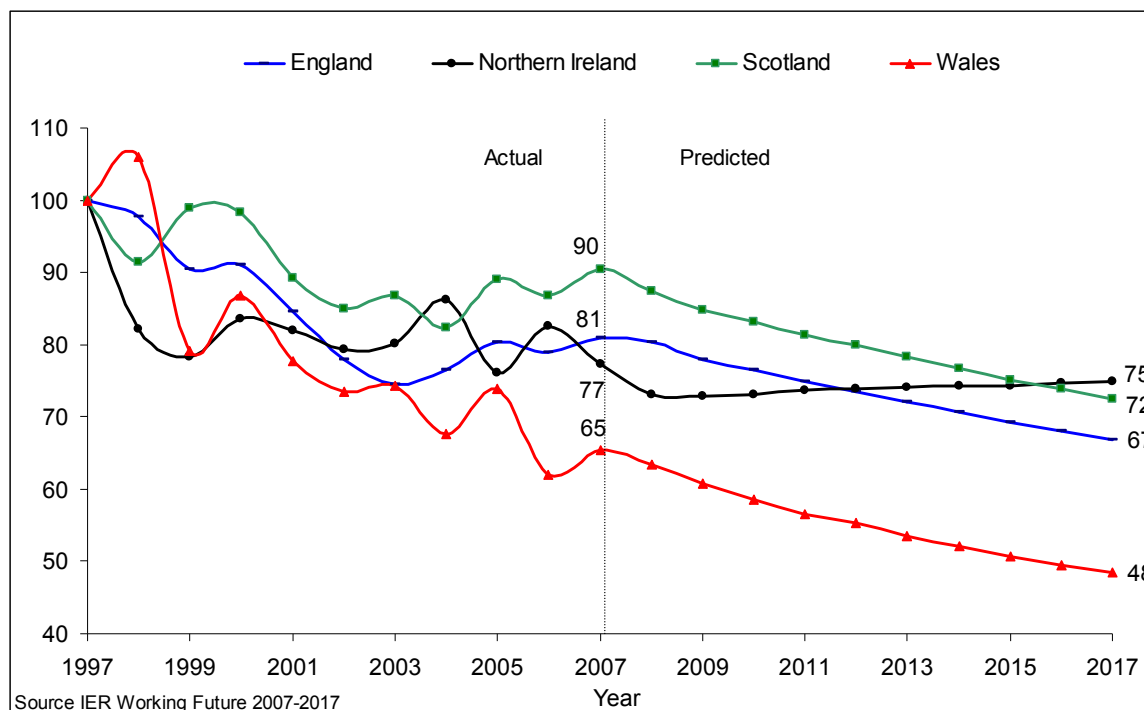
7.2 The UK Picture

The Working Futures projections show that employment levels in the environmental and land-based sector declined by 23% in Northern Ireland between 1997 and 2007, compared to a 24% decline in the UK as a whole. During the same time period, overall employment levels across Northern Ireland rose by 20%. A focus group participant perceptively commented: *“We need a lot more fresh people coming into the industry. There will be a lot of natural wastage, which will take a lot of people out over the next 10 or 15 years.”*

The Working Futures report¹²⁷ highlights a number of issues which have contributed to this decline:

- The Common Agricultural Policy (CAP) subsidies for production have been removed, with farms now only receiving payments in the form of the Single Farm Payment for environmental management. This may lead to consideration of economies of scale given the concentration of small farms¹²⁸ in Northern Ireland
- Agricultural prices and incomes have in general fallen for many years
- The sector has been beset by issues such as foot and mouth disease and tuberculosis, which have added to the pressure on the livestock industry

Figure 7.1 Change of sector employment levels, UK 1997-2017 (Index: 1997 = 100)



¹²⁷ UK Commission for Employment and Skills (2008) Working Futures 2007-2017, Institute for Employment Research

¹²⁸ See Section 2.2

Looking forward to 2017, the Working Futures projections show that both output and productivity will increase over the next ten years. However in the long-term, productivity growth is expected to outpace output growth, and so employment is expected to fall by 3% by 2017.

The main drivers for this decline in future employment are seen as threefold:

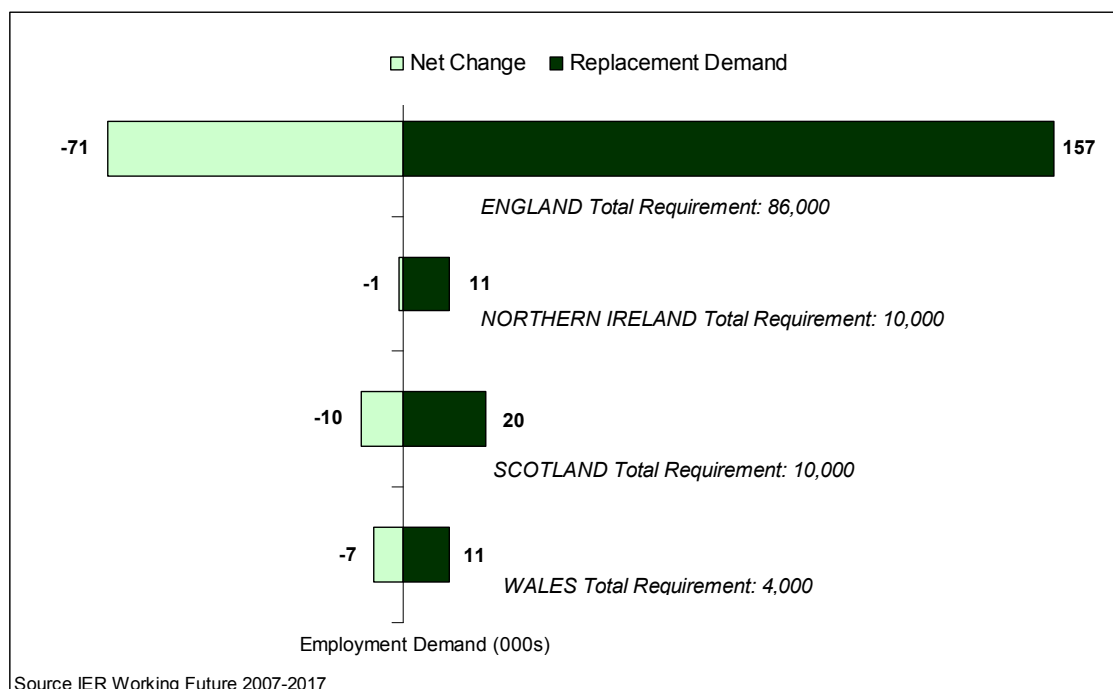
- Firstly, small farms are expected to continue to close or be consolidated within larger units. Larger farms are better able to substitute labour with machines (and as such overall employment levels may decline)
- Secondly, there has been a diversification from food producing to other activities in the rural economy. Many who used to work in farming may continue to work in the same place, but in different activities, such as leisure and tourism, although this will be less of an issue in Northern Ireland than elsewhere in the UK due to the lower levels of farm diversification¹²⁹
- Finally, the projections expect previous trends (such as disease outbreaks) to re-assert themselves. This indicates that if the sector can become collectively better at risk management, reducing the likelihood and impact of disease outbreaks the actual level of employment decline will be less than projected in Working Futures. “Skills” have an important role to play within this

Employment Projections by Nation

Figure 7.2 summarises the net change in employment levels and the employment requirements in the environmental and land-based sector by nation. Employment in Northern Ireland is expected to decline by only 1,000 jobs (3%) over the next ten years. This compares to a decline of 90,000 workers (17%) between 2007 and 2017 across the UK as a whole. In Northern Ireland the sector will still need to recruit new workers, as the replacement demand is greater than the decline in overall employment numbers.

¹²⁹ Northern Ireland 9%, UK 23% (EU Farm Structure Survey 2007, in Eurostat Agricultural Statistics Database)

Figure 7.2 Projected employment demand, UK 2007 - 2017



Definitions:

Net change refers to the expected expansion or contraction in overall employment levels. Employers will often need to replace those workers who leave due to mortality, retirement, career moves, or related reasons. This is known as the **replacement demand**. The sum of the net change and replacement demand is referred to as the **total requirement**.

7.3 Northern Ireland

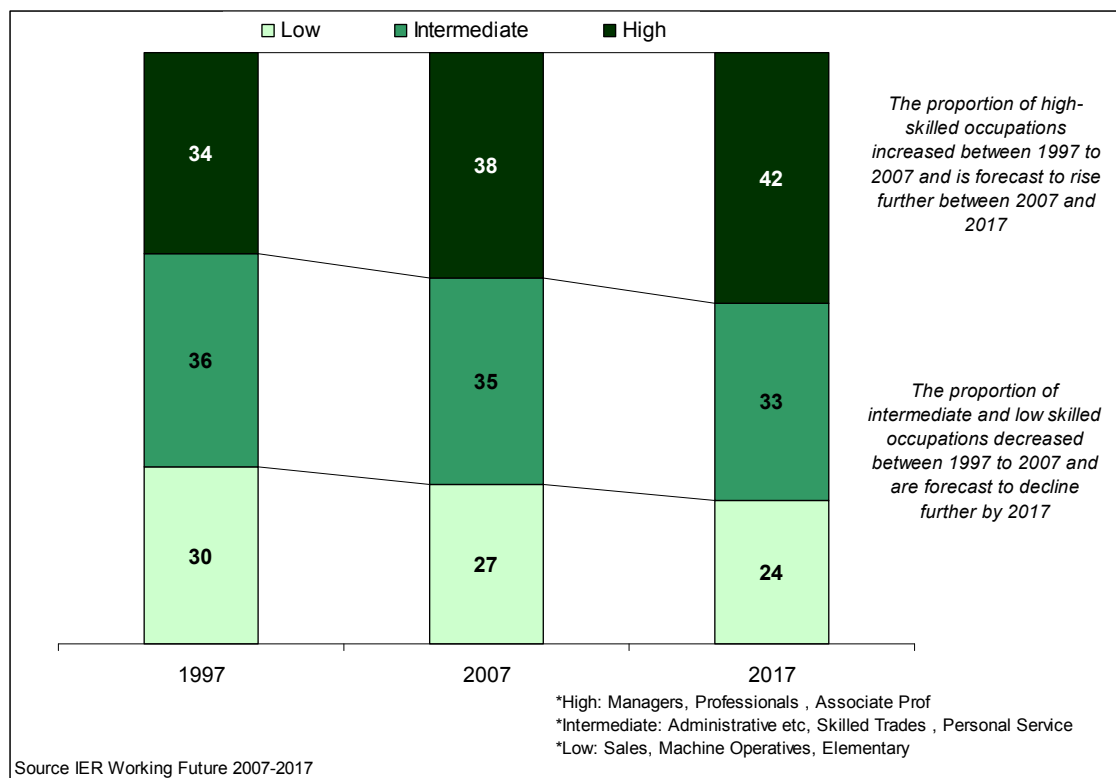
The Working Futures projections show there will be a slight fall in employment across the environmental and land-based sector as a whole within Northern Ireland. Within the sector there are expected to be changes in the composition of employment by industry and occupation. These changes will have an impact on the nature of the types of skills businesses will need in the future.

Composition by Occupational Skill Level

In 1997 there was a fairly equal distribution of the workforce in low, intermediate and highly skilled occupations (Figure 7.3). By 2007, the proportion of people working in highly skilled occupations had increased by 4 percentage points, whilst a 3 percentage point decline was observed in the proportion of people in low skilled occupations.

This trend is forecast to continue in the future with high skilled occupations rising by a further 4 percentage points by 2017 and low skilled occupations will decline further. This means there will be an intensification of skill levels within the sector. In general terms the sectors will need to be more skilled in ten years time than they are today.

Figure 7.3 Workforce composition by occupational level, Northern Ireland 1997 – 2017



The Oxford Economics research¹³⁰ covers a different time period (2008-2020) and is only available for the combined agriculture, forestry and fishing sector. These projections paint a similar picture of how the nature of employment will change in the future. However, they do present a slightly more positive picture of how the total employment levels will change.

130 Departments of Employment and Learning, Forecasting Future Skill Needs in Northern Ireland, Oxford Economics (2009)

Table 7.1 Forecasting sectoral employment change 2008-2020

| (000s) | Baseline scenario | Aspiration scenario |
|--|-------------------|---------------------|
| Agriculture, forestry & fishing | 0.2 | 0.6 |
| Mining & quarrying | -0.4 | -0.4 |
| Manufacturing | -10.3 | -8.3 |
| Utilities | 0.2 | 0.2 |
| Construction | -1.2 | 0.1 |
| Retail & distribution | 6.1 | 10.6 |
| Hotels & restaurants | 5.8 | 8.2 |
| Transport & communications | 2.2 | 4 |
| Financial services | 4 | 5.8 |
| Business services | 24.2 | 32.9 |
| Public administration | -1.2 | -1.2 |
| Education | 3.1 | 3.2 |
| Health & social work | 15.7 | 15.8 |
| Other personal services | 3.2 | 4.4 |
| | | |
| Total employment | 59.1 | 87.9 |

Source: Departments of Employment and Learning, Forecasting Future Skill Needs in Northern Ireland, Oxford Economics (2009)

The Oxford Economics projections provide two alternative scenarios for the future, with the numbers employed in agriculture, forestry and fishing expected to increase slightly in each. The more aspirational and optimistic outcome outlines the trajectory the Northern Ireland economy would need to follow to meet the Programme for Government¹³¹ Public Service Agreement's (PSA 1) private sector productivity target by 2015, given the nature of the economy, and the direction of policy. This includes the work of Invest NI, MATRIX and the focus on priority sectors (namely financial and business services, ICT, life sciences and hi-tech manufacturing).

This evidence is important to understand the demands for future skills. It demonstrates that interventions from government are expected to have an impact on employment levels across sectors. The data also shows that government interventions in Northern Ireland will have greatest impact on employment levels in a small number of priority sectors. Within agriculture, forestry and fishing there is only expected to be a difference of 400 people in the employment numbers required over a 12-year period, between the baseline and aspirational scenarios. This difference is relatively small when set against the level of employment demand that is expected to come from replacement of the existing workforce.

¹³¹ Northern Ireland Executive (2008) Northern Ireland Programme for Government (2008-2011)

7.4 Key Considerations

There is strong evidence that jobs are becoming increasingly skilled within the sector. Businesses have been able to become more efficient, developing new methods and applying new technologies, which have led to a decline in the number and proportion of lower-skilled roles. This will present a significant challenge in upskilling the existing workforce.

The environmental and land-based sector has a diverse spread of 17 industries. Although these industries share many common characteristics the recession has not affected all industries in the same way. Of those businesses who participated in the focus groups, broadly speaking it was the industries that are reliant on discretionary consumer spending (notably *floristry*) or those linked to the construction sectors (such as fencing and landscaping) which have been most adversely affected by the recession. Although some elements of the agricultural industries have been affected (such as organic production) demand for food is non-cyclical, and as such the sector has weathered the downturn more strongly than most parts of the economy.

8.0 Industry Profiles

This chapter looks at the key findings from the Lantra/DARD survey 2009 by industry. Where possible, comparisons have been made with results from the *Northern Ireland Survey of Businesses 2005*.¹³² To allow comparison with the 2005 survey, all data herein is unweighted.

It should be noted that although the 2005 and 2009 surveys are similar, many of the questions are not directly comparable. An example of this would be assessing the changes in the future skills needs where both surveys contained a slightly different list of pre-defined skills and employers were asked to specify whether these skills would be needed (or not) over the next 5 years. In lieu of this, we have provided some comparisons of the data using a more indicative approach.

Agricultural Crops

Industry profile

| Industry Profile | |
|-----------------------------------|-------|
| Number of establishments (sample) | 15 |
| Sole proprietorships | 80% |
| Business Size: | |
| 0 employees | 40.0% |
| 1-10 | 53.3% |
| 11-49 | 6.7% |

The Agricultural Crops industry sample comprised 15 businesses¹³³, of which four fifths were sole proprietorships. The data indicates that businesses in general have become larger since 2005; just over half of the businesses employ between 1 and 10 employees (53.3%, cf. 40.3% in 2005) and 6.7% of businesses employ 11-49 employees, a 5.2% increase since 2005. The proportion of micro-businesses with no employees has decreased (40.0%, cf. 58.2% in 2005).

¹³² Lantra (2005), Northern Ireland Survey of Businesses, An assessment of the skills needs for the Land-based and Environmental industries in Northern Ireland

¹³³ Whilst a full analysis has been carried out on the Agricultural Crops industry, the numbers are low, therefore the data should be used with caution

Workforce¹³⁴

| Workforce | |
|--|------------|
| Total Employment (Working Owners/ Full-time/Part-time employees) | 44 |
| Employees (Full-time) | 14 (60.9%) |
| Employees (Part-time) | 9 (39.1%) |
| Casual/seasonal employees | 10 |
| Migrant workers employed during last 12 months | 4 |
| Male employees | 22 (66.7%) |
| Female employees | 11 (33.3%) |
| Age of working owners (highest banding %): Age 55-64 | 7 (33.3%) |
| Age of employees (highest banding %): Age 20-24 | 8 (24.2%) |

Total employment among the 15 businesses surveyed was 44. Three fifths of employees were full-time and over three fifths of employees were male (66.7%) (cf. 91.9% male workforce in 2005). The survey results indicate that the use of seasonal and casual labour is less prevalent compared to 2005. The age profile of working owners was most commonly in the 55-64 years of age range (33.3%) followed by 35-44 (23.8%). For employees the most common age range was 20-24 years (24.2%) followed by 16-19 and 25-34 years (both 21.2%).

Development

One third of the businesses said training had taken place within the last 2 years, and the largest amount of money spent on training was £500-£999. Almost half of businesses (46.7%) said, *"no training is undertaken within the business"*.

The most highly endorsed barrier to training was *"the financial cost of training"*, reported by 40.0% of businesses followed by *"all staff are fully proficient"* (33.3%). Other common barriers included *"time lost through training"*, *"lack of subsidy for training"*, *"can't find suitable training"* and *"training providers are located too far away"* (all reported by 26.7% of businesses).

Almost one quarter of businesses have a written business plan (26.7%), 6.7% have a written training and development plan and 13.3% have both. Since 2005 the proportion of businesses with no business, training or development plans has reduced considerably (46.7%, cf. 84% in 2005).

¹³⁴ Data on gender (male employees + female employees) is based on full-time, part-time and casual/seasonal employment numbers but excludes working owners and migrant workers. Figures may not sum if estimated figures were provided

Skills needs, gaps and shortages

| Skills needs, gaps and shortages | |
|--|----------|
| Skills gap (% of establishments) | 1 (6.7%) |
| Occupations reporting skills gaps (number not proficient): | |
| Skilled Trade Occupations | 3 |
| Current vacancies (% of establishments) | 0 |
| Hard-to-fill vacancies (% of establishments) | 0 |
| Skills shortage vacancies (% of establishments) | 0 |

By occupation, skills gaps were reported for skilled trade's workers; however, the employers did not know what skills were needed to reduce the skills gaps of these workers.

There were **no current vacancies** at the time of the survey, nor were any vacancies reported at the time of the 2005 survey.

Future Skills Needs

The following table lists the future skills needs within the Agricultural Crops industry:

| | |
|---|-------|
| Accounts | 85.7% |
| Technical and practical skills | 78.6% |
| Planning and organising | 78.6% |
| Basic computing or Information Technology (IT) skills | 78.6% |
| Complying with other legislation | 71.4% |
| Marketing and sales | 71.4% |
| Record keeping | 71.4% |
| Communication skills | 64.3% |
| Complying with employment legislation | 64.3% |
| Team working skills | 57.1% |
| Customer handling skills | 50.0% |
| People management skills | 50.0% |
| Numeracy skills | 50.0% |
| Literacy skills | 50.0% |
| Specialist computing skills associated with your business | 50.0% |
| Problem solving skills | 42.9% |
| Other skills: | 7.1% |
| Foreign language skills | 0% |

Base: 14 businesses

The most commonly needed skills cited by employers included both technical (job specific) and generic business skills. The most highly endorsed future skills needs for businesses were accounts (85.7%), technical and practical skills, planning and organising, and basic computing or IT skills (all reported by 78.6% of employers). The future skills needs have not changed significantly since 2005 where computing/IT and technical skills were the second and third most cited skills needed.

Some employers cited “Other skills”. These skills included practical/job specific skills such as machinery maintenance and a trade such as building or plumbing to be able to fix or build things around the farm. Environmental skills (how to be more “green” within the business) and health and safety were also mentioned.

During the farmer’s focus group, participants were asked what they looked for when recruiting in terms of knowledge, skills and experience. Farmers cited knowledge of environmental objectives, skills in tractor driving and time-keeping and previous experience as a farmer/farmer’s son and record keeping.

In addition to the skills, knowledge and experience listed above, farmers also cited the following traits as being important when recruiting:

- Good attitude to work
- Pleasant personality
- Honesty
- Willing to work farm hours
- Common sense
- Readiness to accept new technologies
- Open-mindedness
- Ability to carry out work on own initiative
- Ability to learn from mistakes
- Flexibility

Agricultural Livestock

Industry Profile

| Industry Profile | |
|-----------------------------------|-------|
| Number of establishments (sample) | 559 |
| Sole proprietorships | 78.4% |
| Business Size: | |
| 0 employees | 66.2% |
| 1-10 | 33.6% |
| 11-49 | 0.2% |

The Agricultural Livestock industry sample comprised of 559 businesses, of which almost four fifths (78.4%) were sole proprietorships. Business sizes had generally remained constant since 2005; over three fifths of businesses are micro-businesses that do not have any employees (66.2%) and one third of the businesses employ between 1 and 10 employees (33.6%).

Workforce¹³⁵

| Workforce | |
|--|-------------|
| Total Employment (Working Owners/ Full-time/Part-time employees) | 1082 |
| Employees (Full-time) | 78 (27.0%) |
| Employees (Part-time) | 211 (73.0%) |
| Casual/seasonal employees | 70 |
| Migrant workers employed during last 12 months | 32 |
| Male employees | 287 (79.9%) |
| Female employees | 72 (20.1%) |
| Age of working owners (highest banding %): Age 45-54 | 193 (26.4%) |
| Age of employees (highest banding %): Age 25-34 | 87 (24.4%) |

Total employment among the 559 businesses surveyed was 1082. Since 2005, part-time labour has increased with almost three quarters of employees working part-time (73.0%, cf. 52% in 2005) and almost four fifths of employees were male (79.9%). The proportion of seasonal/casual workers has remained relatively the same since the 2005 survey.

¹³⁵ Data on gender (male employees + female employees) is based on full-time, part-time and casual/seasonal employment numbers but excludes working owners and migrant workers. Figures may not add up if estimated figures were provided

The age profile of working owners was most commonly in the 45-54 age range (26.4%), however, almost half of the working owners were over the age of 55 (some 25.7% were aged 65+ and 23.9% were aged 55-64). For employees the most common age range was 25-34 years (24.4%) followed by 35-44 (23.9%) and 20-24 (20.8%).

Development

Only 17.5% of businesses said training had taken place within the last 2 years, and half of businesses (50.1%) said *“no training is undertaken within the business.”*

The amount of money spent across all businesses on training within the past 2 years ranged from under £100 up to £1,000-£4,999. However, the most common expenditure was under £100 (23.5%) followed by £250 – £499 (14.7%).

The most highly endorsed barrier to training was *“the financial cost of training”*, reported by 32.9% of businesses. Other common barriers included *“time lost through training”* (32.4%) and *“all staff are fully proficient”* (28.4%).

Only 8.4% of businesses have a written business plan, 0.9% have a written training development plan and 2.9% have both. When comparing with 2005 data, over four fifths of businesses still do not have either type of business or training plan (86.5%, cf. 88.4% in 2005).

Skills needs, gaps and shortages

| Skills needs, gaps and shortages | |
|--|------|
| Skills gap (% of establishments) | 5.4% |
| Occupations reporting skills gaps (number not proficient): | |
| Managers | 16 |
| Administrative and Secretarial | 3 |
| Skilled Trade | 56 |
| Machine operatives | 2 |
| Elementary | 11 |
| Current vacancies (% of establishments) | 1.1% |
| Hard-to-fill vacancies (% of establishments) | 0.4% |
| Skills shortage vacancies (% of establishments) | 0.2% |

By occupation, skills gaps were reported for a range of occupations, but most commonly for skilled trade’s workers, however, 62.1% of employers said they did not know what skills needed improving amongst these workers. Some employers did specify the skills needed in order to reduce the skills gaps; communication skills were reported by 17.2% of businesses, followed by planning and organisation (13.2%), and basic computing and information technology skills and accounts were both reported by 10.3% of employers.

Future Skills Needs

The following table lists the future skills needs within the Agricultural Livestock industry:

| | |
|---|-------|
| Record keeping | 83.1% |
| Basic computing or Information Technology skills | 81.4% |
| Accounts | 77.2% |
| Complying with other legislation | 75.3% |
| Planning and organising | 72.7% |
| Technical and practical skills | 69.4% |
| Communication skills | 66.0% |
| Literacy skills | 63.6% |
| Complying with employment legislation | 63.0% |
| Problem solving skills | 63.0% |
| Numeracy skills | 61.7% |
| Marketing and sales | 58.6% |
| Team working skills | 54.1% |
| People management skills | 53.5% |
| Customer handling skills | 49.5% |
| Specialist computing skills associated with your business | 43.1% |
| Foreign language skills | 13.3% |
| Other skills | 10.6% |

Base: 527 businesses

The three most commonly cited future skills needs for businesses were record keeping (83.1%), basic computing or IT skills (81.4%) and accounts (77.2%). Similarly, in 2005, IT/computing was the most highly endorsed skills need.

Some employers cited “Other skills”. These skills included practical/job specific skills such as husbandry/animal welfare/stock handling, machinery maintenance and a trade such as building or plumbing to be able to fix or build things around the farm. Environmental skills (how to be more “green” within the business) and health and safety were also mentioned.

During the farmer’s focus group, participants were asked what they looked for when recruiting in terms of knowledge, skills and experience. Farmers cited the importance of knowledge of environmental objectives, an understanding of animals and stockmanship. In terms of skills, tractor driving, handling livestock, stockmanship and time-keeping were cited as important as was previous experience as a farmer/farmer’s son, record keeping, and again, stockmanship.

In addition to the skills, knowledge and experience listed above, farmers also cited the following traits as being important when recruiting:

- Good attitude to work
- Pleasant personality
- Honesty
- Willing to work farm hours
- Common sense
- Readiness to accept new technologies
- Open-mindedness
- Ability to carry out work on own initiative
- Ability to learn from mistakes
- Flexibility

It appears from the Lantra/DARD survey that agricultural livestock businesses have a stronger need for generic business skills, rather than technical and practical (job specific) skills. As a large proportion of businesses in the industry are micro-businesses with no employees, it is likely that these generic skills are needed by the working proprietors to manage all areas of the business in addition to those technical and practical skills needed undertake the physical work on the farms. In contrast, the skills needs identified within focus groups were largely technical (job-specific) and therefore may be the most common skills needed in those larger farms that employ staff.

Animal Care

Industry Profile

| Industry Profile | |
|-----------------------------------|-------|
| Number of establishments (sample) | 73 |
| Sole proprietorships | 74.0% |
| Business Size: | |
| 0 employees | 42.5% |
| 1-10 | 54.8% |
| 11-49 | 2.7% |

The Animal Care industry sample comprised 73 businesses, of which almost three quarters (74.0%) are sole proprietorships. The majority of businesses operate in the private sector (86.3) whilst 9.6% are public sector businesses and 2.7% are voluntary organisations. There have been no significant changes in business size since 2005; over half of the businesses employ 1-10 staff (54.8%) whilst two fifths are micro-businesses that do not have any employees (42.5%).

The turnovers of private sector businesses ranged from under £10,000 up to £1m-1.9m; however, the most common turnover was £10,000 – £49,999 (17.5%) followed by under £10,000 (14.3%). For non-private businesses, the budget of the establishment ranged from under £10,000 up to £50,000 – £99,000. Due to a small number of respondents, specific details have been excluded for data protection reasons.

Workforce¹³⁶

| Workforce | |
|--|------------|
| Total Employment (Working Owners/ Full-time/Part time employees) | 219 |
| Employees (Full-time) | 73 (61.3%) |
| Employees (Part time) | 46 (38.7%) |
| Casual/seasonal employees | 15 |
| Migrant workers employed during last 12 months | 2 |
| Male employees | 80 (58.4%) |
| Female employees | 57 (41.6%) |
| Age of working owners (highest banding %): Age 45-54 | 33 (33.0%) |
| Age of employees (highest banding %): Age 20-24 and 35-44 | 24 (19.4%) |

¹³⁶ Data on gender (male employees + female employees) is based on full-time, part-time and casual/seasonal employment numbers but excludes working owners and migrant workers. Figures may not sum if estimated figures were provided

Total employment among the 73 businesses surveyed was 219. Over three fifths of employees were full-time (61.3%) and almost three fifths of employees were male (58.4%, cf. 63.2% in 2005). The age profile of working owners was most commonly in the age 45–54 range (33.0%). Since 2005, the age profile of employees has generally decreased. The most common ages fell within two age ranges; 20–24 years and 35–44 years (both reported by 19.4% of employers). In 2005 the most common age band for employees was 35–44 (56.7%).

Development

Almost one third of businesses said that training had been undertaken within the last two years (32.9%, cf. 34% in 2005) and over one fifth had undertaken training 2-5 years ago (21.9%). The amount of money businesses spent on training ranged from under £100 up to £1,000–£4,999 and the most common training expenditure was £1,000–£4,999 (29.4%) followed by £500–£999 (23.5%). Some 28.8% of businesses reported that no training is undertaken within the business.

The most highly endorsed barrier to training was, *“the financial cost of training”*, reported by 35.6% of businesses. Other common barriers included, *“all staff are fully proficient”*; therefore employers did not feel the need for training (32.9%), *“time lost through training”* (30.1%) and *“lack of subsidy for training”* (26.0%).

Only 16.4% of businesses have a written business plan, 4.1% have a written training development plan and 12.3% have both. The number of businesses having no written plans at all has decreased since 2005 (61.6%, cf. 70% in 2005).

Skills needs, gaps and shortages

| Skills needs, gaps and shortages | |
|--|-------|
| Skills gap (% of establishments) | 19.2% |
| Occupations reporting skills gaps (number not proficient): | |
| Elementary | 13 |
| Skilled Trade | 8 |
| Managers | 6 |
| Professional | 4 |
| Personal service | 3 |
| Machine operatives | 2 |
| Administrative and Secretarial | 1 |
| Sales and customer service | 1 |
| Current vacancies (% of establishments) | 2.7% |
| Hard-to-fill vacancies (% of establishments) | 2.7% |
| Skills shortage vacancies (% of establishments) | 1.4% |

The proportion of businesses reporting skills gaps has tripled since 2005. By occupation, skills gaps were reported for a range of occupations, but most commonly reported for elementary workers, however, half of employers said they did not know what skills needed improving amongst these workers. Some employers did specify the skills needed in order to reduce the skills gaps and the most common skills needs cited were technical and practical skills, literacy, numeracy and communication skills (all reported by 14.3% of employers).

The proportion of businesses reporting vacancies has reduced considerably since 2005, however, the proportion of businesses reporting hard-to-fill vacancies has generally remained constant (2.7%, cf. 4% in 2005).

Future Skills Needs

The following table lists the future skills needs within the Animal Care industry:

| | |
|---|-------|
| Technical and practical skills | 70.1% |
| Customer handling skills | 70.1% |
| Record keeping | 68.7% |
| Planning and organising | 65.7% |
| Marketing and sales | 61.2% |
| Literacy skills | 61.2% |
| Basic computing or Information Technology skills | 59.7% |
| Complying with other legislation | 59.7% |
| Team working skills | 59.7% |
| Communication skills | 56.7% |
| Complying with employment legislation | 56.7% |
| Numeracy skills | 56.7% |
| Accounts | 55.2% |
| People management skills | 52.2% |
| Problem solving skills | 43.3% |
| Specialist computing skills associated with your business | 32.8% |
| Other skills | 16.4% |
| Foreign language skills | 14.9% |

Base: 67 businesses

Technical/practical skills and customer handling skills were the most commonly cited future skills needs for animal care businesses. Similarly, in 2005, customer relations was a common skills need, however, since 2005 the need for technical and practical skills is now more prevalent. “Other skills” cited by employers included practical/job specific skills such as small animal training, animal welfare and “*just able to work with animals*”.

Aquaculture

Industry Profile¹³⁷

| Industry Profile | |
|-----------------------------------|-------|
| Number of establishments (sample) | 11 |
| Sole proprietorships | 45.5% |
| Business Size: | |
| 0 employees | 45.5% |
| 1-10 | 45.5% |
| 11-49 | 9.1% |

The Aquaculture industry sample comprised of 11 businesses¹³⁸, of which 45.5% were sole proprietorships and 45.5% were partnerships. All except 2 businesses operated in the private sector. Some 45.5% of businesses were micro-businesses employing no staff whilst a further 45.5% employ 1-10 staff.

The turnovers of the businesses ranged from £10,000-£49,999 up to £2m-4.9m. Due to a small number of respondents, specific details on turnover have been excluded for data protection reasons.

Workforce¹³⁹

| Workforce | |
|--|------------|
| Total Employment (Working Owners/ Full-time/Part time employees) | 41 |
| Employees (Full-time) | 24 (92.3%) |
| Employees (Part time) | 2 (7.7%) |
| Casual/seasonal employees | 4 |
| Migrant workers employed during last 12 months | 0 |
| Male employees | 21 (70.0%) |
| Female employees | 9 (30.0%) |
| Age of working owners (highest banding %): Age 55-64 | 5 (33.3%) |
| Age of employees (highest banding %): Age 25-34 | 10 (33.3%) |

¹³⁷ Comparisons have not been made with 2005 data due to a low number of responses (7 businesses in 2005 and 11 respondents in 2009)

¹³⁸ Whilst a full analysis has been carried out on the Aquaculture industry, the numbers are low, therefore the data should be used with caution

¹³⁹ Data on gender (male employees + female employees) is based on full-time, part-time and casual/seasonal employment numbers but excludes working owners and migrant workers. Figures may not add up if estimated figures were provided

Total employment among the 11 businesses surveyed was 41. The majority of employees were full-time (92.3%) and 70.0% of workers were male.

The most common ages of working owners fell within the 55-64 age range (33.3%) followed by 65+ (26.7%). For employees the most common age range was 25-34 years (33.3%).

Development

Just over one third of businesses said that training had been undertaken within the last two years (36.4%) and almost one fifth had undertaken training 2-5 years ago, while over one third of businesses said it had been six or more years since training had been undertaken (36.4%). The amount of money businesses spent on training ranged from £100–£249 up to £5,000–£9,999.

When asked about barriers to training, the most highly endorsed barrier was *“the financial cost of training”* reported by 63.6% of businesses. Other common barriers included, *“time is lost through training”* (36.4%) followed by *“lack of subsidy for training”*, *“no cover is available whilst staff/I am being trained”*, *“lack of information about training opportunities”*, and *“can’t find suitable training”* (all reported by 27.3% of businesses).

Surprisingly almost three quarters of businesses did not have a written business plan or a written training and development plan (72.7%). Just less than one fifth of businesses have a written business plan (18.2%).

Skills needs, gaps and shortages

| Skills needs, gaps and shortages | |
|--|------|
| Skills gap (% of establishments) | 9.1% |
| Occupations reporting skills gaps (number not proficient): | |
| Managers | 1 |
| Current vacancies (% of establishments) | 0.0% |
| Hard-to-fill vacancies (% of establishments) | 0.0% |
| Skills shortage vacancies (% of establishments) | 0.0% |

By occupation, skills gaps were reported for managers. The skills needed were specialist computing skills, accounts and record keeping.

No current vacancies were reported.

Future Skills Needs

The following table lists the future skills needs within the Aquaculture industry:

| | |
|---|-------|
| Team working skills | 81.8% |
| Planning and organising | 81.8% |
| Customer handling skills | 72.7% |
| Record keeping | 72.7% |
| Basic computing or Information Technology skills | 72.7% |
| Literacy skills | 63.6% |
| Accounts | 63.6% |
| Technical and practical skills | 63.6% |
| Accounts | 63.6% |
| People management skills | 63.6% |
| Numeracy skills | 63.6% |
| Complying with other legislation | 54.5% |
| Communication skills | 54.5% |
| Problem solving skills | 54.5% |
| Complying with employment legislation | 45.5% |
| Marketing and sales | 45.5% |
| Specialist computing skills associated with your business | 36.4% |
| Other skills | 36.4% |
| Foreign language skills | 9.1% |

Base: 11 businesses

Team working and planning and organising were the most commonly cited **future skills needs** (both reported by 81.8% of businesses). A small number of businesses cited “other skills” and the need for “*ongoing training in aquaculture*” was also mentioned.

Environmental Conservation

Industry Profile¹⁴⁰

| Industry Profile | |
|-----------------------------------|-------|
| Number of establishments (sample) | 20 |
| Sole proprietorships | 45.0% |
| Business Size: | |
| 0 employees | 15.0% |
| 1-10 | 50.0% |
| 11-49 | 25.0% |
| 50+ | 10.0% |

The Environmental Conservation industry sample comprised of 20 businesses, of which half were limited companies and 45.0% were sole proprietorships. Three fifths of businesses operated in the private sector whilst 15.0% were voluntary organisations and one tenth were public sector businesses. Half of the businesses employ between 1 and 10 employees and one quarter employ 11-49 staff.

The turnover (or budget for non-private businesses) of all businesses ranged from £10,000–£49,000 up to £5m+, however, more detailed statistics on turnover have been excluded due to small numbers.

Workforce¹⁴¹

| Workforce | |
|--|-------------|
| Total Employment (Working Owners/ Full-time/Part-time employees) | 440 |
| Employees (Full-time) | 317 (84.8%) |
| Employees (Part-time) | 57 (15.2%) |
| Casual/seasonal employees | 8 |
| Migrant workers employed during last 12 months | 4 |
| Male employees | 214 (56.0%) |
| Female employees | 168 (44.0%) |
| Age of working owners (highest banding %): Age 45-54 | 27 (40.9%) |
| Age of employees (highest banding %): Age 35-44 | 80 (36.9%) |

¹⁴⁰ Comparisons have not been made with 2005 data due to a low number of responses in 2005 (9 businesses)

¹⁴¹ Data on gender (male employees + female employees) is based on full-time, part-time and casual/seasonal employment numbers but excludes working owners and migrant workers. Figures may not add up if estimated figures were provided

Total employment among the 47 businesses surveyed was 440. The majority of employees work full-time (84.8%) and there is a slight dominance of male workers within the industry (56%).

The age profile of working owners was most commonly in the age 45–54 range (40.9%) followed by age 35–44 (28.8%). For employees the most common age ranges were 35–44 years (36.9%) and 25–34 (36.4%).

Development

Almost 9 out of 10 businesses said training had taken place within the last 2 years (85.0%). The amount of money businesses spent on training ranged from under £100 to £75,000–£99,999. The most common training expenditure was £500–£999 (20.0%).

When asked about barriers to training, the most highly endorsed barriers were *“the financial cost of training”* (reported by 55.5% of businesses), *“time is lost through training”* (40.0%), and *“no cover is available whilst staff/I am being trained”* (35.0%).

Just over one third of businesses (35.0%) have a written business plan, 15.0% have a written training development plan and 30.0% have both. One fifth of businesses do not have either type of plan.

Skills needs, gaps and shortages

| Skills needs, gaps and shortages | |
|--|-------|
| Skills gap (% of establishments) | 25.0% |
| Occupations reporting skills gaps (number not proficient): | |
| Managers | 10 |
| Professional | 14 |
| Associate professional | 11 |
| Administrative and secretarial | 6 |
| Elementary | 1 |
| Current vacancies (% of establishments) | 20.0% |
| Hard-to-fill vacancies (% of establishments) | 5.0% |
| Skills shortage vacancies (% of establishments) | 5.0% |

By occupation, skills gaps were reported for a range of occupations, but most commonly reported for those within professional occupations. Only 4 employers responded to the question *“thinking about your workers who are not fully able to do the job to the required level, which skills, if any, do you feel need improving?”*. Communication skills and people management skills were the most commonly cited skills needed for those workers with skills gaps.

Future Skills Needs

The following table lists the future skills needs within the Environmental Conservation industry:

| | |
|---|-------|
| Planning and organising | 90.0% |
| People management skills | 85.0% |
| Technical and practical skills | 85.0% |
| Problem solving skills | 80.0% |
| Complying with other legislation | 80.0% |
| Communication skills | 80.0% |
| Complying with employment legislation | 80.0% |
| Basic computing or Information Technology skills | 75.0% |
| Team working skills | 75.0% |
| Literacy skills | 65.0% |
| Customer handling skills | 65.0% |
| Marketing and sales | 60.0% |
| Record keeping | 60.0% |
| Numeracy skills | 60.0% |
| Specialist computing skills associated with your business | 55.0% |
| Accounts | 50.0% |
| Other skills | 30.0% |
| Foreign language skills | 5.0% |

Base: 20 businesses

Planning and organising was the most commonly cited **future skills need** reported by 90.0% of businesses. This was followed by people management skills and technical and practical skills (both reported by 85.0% of businesses).

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Equine

Industry Profile

| Industry Profile | |
|-----------------------------------|-------------------|
| Number of establishments (sample) | 13 ¹⁴² |
| Sole proprietorships | 69.2% |
| Business Size: | |
| 0 employees | 23.1% |
| 1-10 | 76.9% |
| 11-49 | 0.0% |

The Equine industry sample comprised of 13 businesses, of which 69.2% were sole proprietorships. All except 4 businesses operated in the private sector. The size of businesses was similar to 2005; over three quarters of the businesses employ between 1 and 10 employees (76.9%) and just less than one quarter are micro-businesses employing no staff (23.1%).

The turnover of the private businesses ranged from under £10,000 up to £250,000–£499,999. More detailed statistics on turnover have been excluded due to low numbers; likewise, only 1 of the non-private businesses indicated the budget of the establishment in the last financial year so the result has been excluded here.

Workforce¹⁴³

| Workforce | |
|--|------------|
| Total Employment (Working Owners/ Full-time/Part-time employees) | 51 |
| Employees (Full-time) | 16 (44.4%) |
| Employees (Part-time) | 20 (55.6%) |
| Casual/seasonal employees | 2 |
| Migrant workers employed during last 12 months | 0 |
| Male employees | 11 (28.9%) |
| Female employees | 27 (71.1%) |
| Age of working owners (highest banding %): Age 35 - 44 | 6 (40.0%) |
| Age of employees (highest banding %): Age 25-34 | 8 (21.1%) |

¹⁴² Whilst a full and comparative analysis has been carried out on the Equine industry, the number of respondents are low and therefore the results should be used with caution

¹⁴³ Data on gender (male employees + female employees) is based on full-time, part-time and casual/seasonal employment numbers but excludes working owners and migrant workers. Figures may not add up if estimated figures were provided

Total employment among the 13 businesses surveyed was 51. Since 2005, part time labour has increased within the industry; just over half of employees work part-time (55.6%, cf. 30.8% in 2005) and almost three quarters of employees were female (71.1%). The use of seasonal/casual labour has decreased dramatically since 2005.

The age profile of working owners was most commonly in the age 35–44 range (40.0%) followed by 45–54 (26.7%). The age profile of employees within the Equine industry has increased since 2005; the most common age range was 25–34 years (21.1%) followed by 35–44 (18.4%). In 2005 over three fifths of employees fell within the 16–19 age group (63.3%).

Development

A high level of training appears to take place within the equine industry. The majority of businesses said training had taken place within the last 2 years (92.6%) and the amount businesses spent on training ranged between £249 and £4,999. The most common amount of money businesses spent on training fell within £100–£249 (25.0%) or £500–£999 (25.0%).

The most highly endorsed barrier to training was *“the financial cost of training”*, reported by 76.9% of businesses. Other common barriers included *“lack of subsidy for training”* (69.2%), *“time lost through training”* (61.5%) and *“no cover is available while staff/ am being trained”* (53.8%). Participants in the equine focus group also highlighted the lack of time to do training as a barrier and also mentioned the need for shorter courses:

“Need to offer more small short courses over 2 hours in the evening”

Some 15.0% of businesses have a written business plan, 15.0% have a written training development plan and 15.0% have both. Over half of businesses do not have either type of plan (53.8%, cf. 72.7% in 2005).

Skills needs, gaps and shortages

| Skills needs, gaps and shortages | |
|---|-------|
| Skills gap (% of establishments) | None |
| Current vacancies (% of establishments) | 23.1% |
| Hard-to-fill vacancies (% of establishments) | 15.4% |
| Skills shortage vacancies (% of establishments) | None |

No skills gaps were reported, however, this may be due to the high levels of training undertaken within the industry.

No skills shortage vacancies were reported.

Future Skills Needs

The following table lists the future skills needs within the Equine industry:

| | |
|---|-------|
| Customer handling skills | 90.9% |
| People management skills | 90.9% |
| Complying with employment legislation | 81.8% |
| Planning and organising | 81.8% |
| Problem solving skills | 81.8% |
| Team working skills | 81.8% |
| Technical and practical skills | 72.7% |
| Literacy skills | 72.7% |
| Communication skills | 72.7% |
| Complying with other legislation | 72.7% |
| Marketing and sales | 72.7% |
| Record keeping | 72.7% |
| Numeracy skills | 72.7% |
| Basic computing or Information Technology skills | 54.5% |
| Accounts | 54.5% |
| Foreign language skills | 27.3% |
| Specialist computing skills associated with your business | 9.1% |
| Other skills | 9.1% |

Base: 11 businesses

The Lantra/DARD survey identified that a broad range of skills (including both technical/job specific and generic business skills) would be needed within Equine businesses in the future.

The most commonly cited **future skills needs** for businesses were customer handling and people management skills (both reported by 90.9% of businesses). Similarly, the need for customer relation skills was commonly cited in the 2005 survey. Other common skills needs cited by employers included coping with employment legislation, planning and organising, problem solving and team working skills (all reported by 81.8% of employers).

These findings are also supported by the Northern Ireland Equine focus group in which participants identified some of the same skills/training needs, namely customer care skills and legislation (including employment legislation). Focus group participants also mentioned the need for interview skills, IT skills (particularly website and e-mail training), health and safety training, generic business skills, and finance.

It was also highlighted during a focus group that when recruiting, a lack of practical experience is often displayed.

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Farriery

Due to a small number of respondents (1 business) the analysis by industry has been excluded from this section.

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Fencing

Industry Profile¹⁴⁴

| Industry Profile | |
|-----------------------------------|-------|
| Number of establishments (sample) | 11 |
| Sole proprietorships | 81.8% |
| Business Size: | |
| 0 employees | 36.4% |
| 1-10 | 63.6% |
| 11-49 | % |

The Fencing industry sample comprised 11 businesses¹⁴⁵, all of which operate in the private sector and over four fifths are sole proprietorships (81.8%). Approximately one third of businesses are micro-businesses with no employees (36.4%) and just less than two thirds employ 1-10 employees (63.6%).

The turnovers of these businesses ranged from under £10,000 up to £250,000–£4,999,000? Due to a small number of respondents, specific details on turnover have been excluded for data protection reasons.

Workforce¹⁴⁶

| Workforce | |
|--|------------|
| Total Employment (Working Owners/ Full-time/Part-time employees) | 29 |
| Employees (Full-time) | 12 (75.0%) |
| Employees (Part-time) | 4 (25.0%) |
| Casual/seasonal employees | 4 |
| Migrant workers employed during last 12 months | 0 |
| Male employees | 17 (85.0%) |
| Female employees | 3 (15.0%) |
| Age of working owners (highest banding %): Age 45-54 | 5 (41.7%) |
| Age of employees (highest banding %): Age 35-44 | 7 (53.8%) |

¹⁴⁴ Comparisons have not been made with 2005 data due to a low number of responses (14 businesses in 2005 and 11 businesses in 2009)

¹⁴⁵ Though a full analysis has been carried out on the Fencing industry, the numbers are low, therefore the data should be used with caution

¹⁴⁶ Data on gender (male employees + female employees) is based on full-time, part-time and casual/seasonal employment numbers but excludes working owners and migrant workers. Figures may not add up if estimated figures were provided

Total employment among the 11 businesses surveyed was 29. Three quarters of employees were full-time and over four fifths of employees were male (85.0%). The age profile of working owners was most commonly in the 45–54 age range (41.7%). For employees the most common age range was 35–44 years (53.8%).

Development

Just over one quarter of businesses said that training had been undertaken within the last two years (27.3%). The amount of money businesses spent on training ranged from £250–£499 up to £1,000–£4,999, although some of the training was reported to be publicly funded. In contrast, almost half of the businesses (45.5%) said that no training was undertaken within the business.

The most highly endorsed barrier to training was “*all staff are fully proficient*” (therefore employers did not feel the need for training), which was reported by 63.6% of businesses. Other common barriers included, “*lack of subsidy for training*” (45.5%), “*the financial cost of training*” and “*time lost through training*” (both reported by 27.3% of businesses).

Almost three quarters of businesses do not have a written business plan or a training and development plan (72.7%). Only a small proportion of businesses had a written business plan (9.3%).

Skills needs, gaps and shortages

| Skills needs, gaps and shortages | |
|--|-------|
| Skills gap (% of establishments) | 18.2% |
| Occupations reporting skills gaps (number not proficient): | |
| Administrative and Secretarial | 1 |
| Elementary | 1 |
| Current vacancies (% of establishments) | 0.0% |
| Hard-to-fill vacancies (% of establishments) | 0.0% |
| Skills shortage vacancies (% of establishments) | 0.0% |

By occupation, skills gaps were reported for administrative and secretarial and elementary occupations. The skills needed by these workers, as reported by employers are communication skills.

No skills shortage vacancies were reported.

Future Skills Needs

The following table lists the future skills needs within the Fencing industry:

| | |
|---|-------|
| Technical and practical skills | 81.8% |
| Record keeping | 54.5% |
| Numeracy skills | 45.5% |
| Accounts | 45.5% |
| Customer handling skills | 45.5% |
| Planning and organising | 45.5% |
| Marketing and sales | 45.5% |
| Literacy skills | 45.5% |
| Basic computing or Information Technology skills | 36.4% |
| Complying with other legislation | 36.4% |
| Team working skills | 36.4% |
| Communication skills | 36.4% |
| Complying with employment legislation | 36.4% |
| People management skills | 36.4% |
| Problem solving skills | 27.3% |
| Specialist computing skills associated with your business | 18.2% |
| Other skills | 9.1% |
| Foreign language skills | 9.1% |

Base: 67 businesses

The Lantra/DARD survey highlighted that there was a strong need for technical and practical skills (reported by 81.8% of businesses).

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Fisheries Management

Due to a small number of respondents (2 businesses) the analysis by industry has been excluded from this section.

Floristry

Industry Profile

| Industry Profile | |
|-----------------------------------|-------|
| Number of establishments (sample) | 47 |
| Sole proprietorships | 74.5% |
| Business Size: | |
| 0 employees | 42.6% |
| 1-10 | 57.4% |
| 11-49 | 0.0% |

The Floristry industry sample comprised 47 businesses, of which almost three quarters were sole proprietorships (74.5%). All except 5 businesses operated in the private sector. The data indicates that businesses in general have become smaller since 2005; almost three fifths of the businesses employ between 1 and 10 employees (57.4%, cf. 76.1% in 2005) and just over two fifths are micro-businesses employing no staff (42.6%, cf. 23.9% in 2005).

The turnover of the private businesses ranged from under £10,000 up to £100,000|–£249,999. The most common turnover stated by businesses was £10,000–£49,999 (14.3%). Only 2 of the non-private businesses gave the budget of the establishment in the last financial year so the result has been excluded here.

Workforce¹⁴⁷

| Workforce | |
|---|-----------------|
| Total Employment (Working Owners/ Full-time/Part-time employees) | 104 |
| Employees (Full-time) | 17 (36.2%) |
| Employees (Part-time) | 30 (63.8%) |
| Casual/seasonal employees | 6 |
| Migrant workers employed during last 12 months | 3 |
| Male employees | 8 (15.1%) |
| Female employees | 45 (84.9%) |
| Age of working owners (highest banding %): Age 35 – 44 | 17 (29.8%) |
| Age of employees (highest banding %): Age 25-34, 35-44, and 45-54 | 10 (18.9% each) |

¹⁴⁷ Data on gender (male employees + female employees) is based on full-time, part-time and casual/seasonal employment numbers but excludes working owners and migrant workers. Figures may not add up if estimated figures were provided

Total employment among the 47 businesses surveyed was 104. Over three fifths of employees work part-time (63.8%) and this was likewise in 2005. The majority of employees were female (84.9%). The age profile of working owners was most commonly in the 35–44 age range (29.8%). The age of employees was more evenly distributed; however, over half were aged between 25 and 54.

Development

Just over half of businesses said training had taken place within the last 2 years (51.1%) and one eighth said training had taken place 2–5 years ago (12.8%). The amount of money businesses spent on training ranged from under £100 to £1,000–£4,999. The most common training expenditure was £100–£249 (28.6%) followed by £250–£499 (21.4%).

The most highly endorsed barriers to training were, *“the financial cost of training”* and *“training providers located too far away”* (both reported by 36.2% of businesses). Other common barriers included, *“lack of subsidy for training”*, *“no cover available whilst I/staff are being trained”* (both 27.7%) and *“time lost through training”* (25.5%).

Some 14.9% of businesses have a written business plan, 6.4% have a written training development plan and only 4.3% have both. Surprisingly the proportion of businesses with no written plans has remained almost constant since 2005 (72.3%).

Skills needs, gaps and shortages

| Skills needs, gaps and shortages | |
|--|-------|
| Skills gap (% of establishments) | 10.6% |
| Occupations reporting skills gaps (number not proficient): | |
| Managers | 4 |
| Skilled Trade | 14 |
| Elementary | 1 |
| Current vacancies (% of establishments) | 10.6% |
| Hard-to-fill vacancies (% of establishments) | 4.3% |
| Skills shortage vacancies (% of establishments) | 2.1% |

As in 2005, skills gaps were reported by just over one tenth of businesses (10.6%) and also reported for the same occupations. Skills gaps were most commonly reported for skilled trades’ workers; however, only one employer specified the skills needed by their workers. The need was for customer handling skills. Other employers said they did not know what skills were needed or they refused to answer the question.

The proportion of businesses reporting vacancies has increased since 2005; however, the proportion reporting hard-to-fill vacancies and skills shortage vacancies has remained the same.

Future Skills Needs

The following table lists the future skills needs within the Floristry industry:

| | |
|---|-------|
| Customer handling skills | 82.2% |
| Marketing and sales | 82.2% |
| Communication skills | 77.8% |
| Technical and practical skills | 71.1% |
| Planning and organising | 71.1% |
| Team working skills | 71.1% |
| Record keeping | 66.7% |
| Complying with other legislation | 64.4% |
| Literacy skills | 64.4% |
| Basic computing or Information Technology skills | 62.2% |
| Numeracy skills | 60.0% |
| Complying with employment legislation | 57.8% |
| Problem solving skills | 57.8% |
| People management skills | 55.6% |
| Accounts | 55.6% |
| Specialist computing skills associated with your business | 31.1% |
| Foreign language skills | 15.6% |
| Other skills | 4.4% |

Base: 45 businesses

Customer handling and marketing and sales were the most commonly cited **future skills needs**, both reported by 82.2% of businesses. Likewise, in 2005, marketing and sales and customer relations were the second and third highest future skills needs. A small number of businesses cited “other skills” and made reference to short courses:

“Short courses for expanding certain floristry techniques...like doing wedding flowers.”

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Game and Wildlife Management

Due to a small number of respondents (7 businesses) a full analysis has been omitted.

Future Skills Needs¹⁴⁸

The following table lists the future skills needs within the Game and Wildlife industry:

| | |
|---|-------|
| Complying with employment legislation | 71.4% |
| Basic computing or Information Technology skills | 71.4% |
| Complying with other legislation | 71.4% |
| Planning and organising | 71.4% |
| Record keeping | 57.1% |
| Team working skills | 57.1% |
| Communication skills | 57.1% |
| Problem solving skills | 57.1% |
| Technical and practical skills | 57.1% |
| Customer handling skills | 42.9% |
| Marketing and sales | 42.9% |
| Literacy skills | 42.9% |
| Numeracy skills | 42.9% |
| Accounts | 42.9% |
| People management skills | 42.9% |
| Specialist computing skills associated with your business | 14.3% |
| Other skills | 0.0% |
| Foreign language skills | 0.0% |

Base: 7 businesses

¹⁴⁸ Data on future skills needs has not been compared with 2005 data due to a low number of respondents (7 businesses in 2009)

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Horticulture, Landscaping and Sports Turf¹⁴⁹

Industry Profile

| Industry Profile | |
|-----------------------------------|-------|
| Number of establishments (sample) | 52 |
| Sole proprietorships | 76.9% |
| Business Size: | |
| 0 employees | 46.2% |
| 1-10 | 50.0% |
| 11-49 | 3.8% |

The Horticulture, Landscaping and Sports Turf industry sample comprised 52 businesses, of which over three quarters were sole proprietorships. All except 4 businesses operated in the private sector. Business sizes are similar to those in 2005; a large proportion of businesses are micro-businesses that do not have any employees (46.2%), and half of the businesses employ between 1 and 10 employees.

The most common turnover of private businesses was £10,000–£49,000 (20.8%) followed by £50,000–£99,999 (12.5%). Only 2 of the non-private businesses indicated the budget of the establishment in the last financial year so the results have been excluded.

Workforce¹⁵⁰

| Workforce | |
|--|------------|
| Total Employment (Working Owners/ Full-time/Part-time employees) | 188 |
| Employees (Full-time) | 89 (85.6%) |
| Employees (Part-time) | 15 (14.4%) |
| Casual/seasonal employees | 15 |
| Migrant workers employed during last 12 months | 1 |
| Male employees | 98 (82.4%) |
| Female employees | 21 (17.6%) |
| Age of working owners (highest banding %): Age 35 - 44 | 29 (34.5%) |
| Age of employees (highest banding %): Age 35 - 44 | 25 (26.6%) |

¹⁴⁹ The Horticulture, Landscaping and Sports Turf industry was titled 'Landscape' in 2005.

¹⁵⁰ Data on gender (male employees + female employees) is based on full-time, part-time and casual/seasonal employment numbers but excludes working owners and migrant workers. Figures may not add up if estimated figures were provided

Total employment among the 52 businesses surveyed was 188. Similarly with 2005, almost 9 in 10 employees were full-time and over four fifths of employees were male (82.4%). The age profile of working owners was most commonly in the age 35-44 range (34.5%) followed by 45-54 (21.4%). For employees the most common age range was 35-44 years (26.6%) followed by 45-54 (22.3%).

Development

Half of the businesses said training had taken place within the last 2 years, whereas over one third of businesses (32.7%) said *“no training is undertaken within the businesses”*.

Of those that had undertaken training within the past 2 years, almost one third had spent £500–£999 on training (31.8%) and just over one fifth had spent £1,000–£4,999 (22.7%).

The most highly endorsed barrier to training was, *“the financial cost of training”*, reported by 48.1% of businesses. Other common barriers included *“all staff are fully proficient”* (36.5%), *“time lost through training”* and *“lack of subsidy for training”* (both reported by 34.6% of businesses).

Almost one quarter of businesses have a written business plan (23.1%), 7.7% have a written training development plan and 9.6% have both. Surprisingly over three fifths of businesses do not have either type of plan (65.4%).

Skills needs, gaps and shortages

| Skills needs, gaps and shortages | |
|--|------|
| Skills gap (% of establishments) | 3.8% |
| Occupations reporting skills gaps (number not proficient): | |
| Skilled Trade Occupations | 2 |
| Current vacancies (% of establishments) | 5.8% |
| Hard-to-fill vacancies (% of establishments) | 1.9% |
| Skills shortage vacancies (% of establishments) | 1.9% |

The data indicates that skills gaps have decreased since 2005. By occupation, skills gaps were reported for skilled trades' workers; however, the employers either refused to answer the question about the skills needs of these workers, or said they did not know what skills were needed to reduce the skills gaps.

Future Skills Needs

The following table lists the future skills needs within the Horticulture, Landscaping and Sports Turf industry:

| | |
|---|-------|
| Technical and practical skills | 72.5% |
| Complying with employment legislation | 70.6% |
| Complying with other legislation | 70.6% |
| Planning and organising | 68.6% |
| Customer handling skills | 66.7% |
| Team working skills | 66.7% |
| Marketing and sales | 66.7% |
| People management skills | 64.7% |
| Record keeping | 54.9% |
| Numeracy skills | 54.9% |
| Basic computing or Information Technology skills | 52.9% |
| Accounts | 52.9% |
| Problem solving skills | 51.0% |
| Literacy skills | 49.0% |
| Communication skills | 49.0% |
| Specialist computing skills associated with your business | 29.4% |
| Foreign language skills | 9.8% |
| Other skills | 5.9% |

Base: 51 businesses

The Lantra/DARD survey has highlighted a strong need for technical and practical skills (72.5%). Similarly, technical skills were the third most highly cited skills need in 2005. Other commonly cited future skills needs were employment legislation and other legislation (both reported by 70.6% of businesses).

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Land-based Engineering

Industry Profile

| Industry Profile | |
|-----------------------------------|-------|
| Number of establishments (sample) | 47 |
| Sole proprietorships | 55.3% |
| Business Size: | |
| 0 employees | 21.3% |
| 1-10 | 61.7% |
| 11-49 | 17.0% |

The Land-based Engineering industry sample comprised of 47 businesses, of which over half were sole proprietorships (55.3%) and just over one quarter are partnerships (25.5%). All except 5 businesses operated in the private sector. Over three fifths of the businesses employ between 1 and 10 employees (61.7%) and almost one fifth employ 11-49 staff (17.0%). Just over one fifth are micro-businesses employing no staff (21.3%).

The turnover of the private businesses ranged from £10,000-£49,000 up to £5m+, however, the most common turnover was £1m-£1.9m (14.3%) followed by £500,000-£999,999 (11.9%). Only 1 of the non-private businesses indicated the budget of the establishment in the last financial year so the result has been excluded herein.

Workforce¹⁵¹

| Workforce | |
|--|-------------|
| Total Employment (Working Owners/ Full-time/Part time employees) | 308 |
| Employees (Full-time) | 212 (91.8%) |
| Employees (Part time) | 19 (8.2%) |
| Casual/seasonal employees | 2 |
| Migrant workers employed during last 12 months | 2 |
| Male employees | 174 (78.4%) |
| Female employees | 48 (21.6%) |
| Age of working owners (highest banding %): Age 35 - 44 | 5 (35.7%) |
| Age of employees (highest banding %): Age 25-34 | 43 (32.8%) |

¹⁵¹ Data on gender (male employees + female employees) is based on full-time, part-time and casual/seasonal employment numbers but excludes working owners and migrant workers. Figures may not sum if estimated figures were provided

Total employment among the 47 businesses surveyed was 308. The majority of employees work full-time (91.8%) and almost four fifths of employees were male (78.4%). The age profile of working owners was most commonly in the age 35-44 range (35.7%). For employees the most common age range was 25-34 years (32.8%).

Development

Just over half of businesses said training had taken place within the last 2 years (55.3%).

The amount of money businesses spent on training ranged from under £100 to £10,000–£19,999. The most common training expenditure was £500–£999 (35.0%) followed by £1,000–£4,999 (25.0%).

When asked about barriers to training, almost one third of businesses said that none of the pre-defined barriers applied to them. For those that specified barriers, the most highly endorsed barriers to training were |*"the financial cost of training"* (reported by 27.7% of businesses). Other common barriers included, |*"all staff are fully proficient"* (25.5%), |*"no cover is available whilst staff/I am being trained"* (23.4%), and |*"time is lost through training"* (21.3%).

Only 6.4% of businesses have a written business plan, 2.1% have a written training development plan and only 6.4% have both. Surprisingly over four fifths of businesses do not have either type of plan (83.0%).

Skills needs, gaps and shortages

| Skills needs, gaps and shortages | |
|--|-------|
| Skills gap (% of establishments) | 10.6% |
| Occupations reporting skills gaps (number not proficient): | |
| Managers | 4 |
| Skilled Trade | 3 |
| Administrative and secretarial | 42 |
| Sales and customer services | 13 |
| Current vacancies (% of establishments) | 6.4% |
| Hard-to-fill vacancies (% of establishments) | 2.1% |
| Skills shortage vacancies (% of establishments) | 0.0% |

Since 2005 the proportion of businesses reporting skills gaps has decreased considerably (10.6%, cf. 18.5% in 2005). By occupation, skills gaps were reported for a range of occupations as was the case in 2005, but most commonly reported for administrative and secretarial workers.

Only 4 employers responded to the question |“*thinking about your workers who are not fully able to do the job to the required level, which skills, if any, do you feel need improving?*” and of these, 3 employers said they did not know what skills needed improving.

The proportion of businesses reporting vacancies and hard-to-fill vacancies has also decreased (6.4%, cf. 10.8% in 2005). None of the businesses reported skills shortages, compared to 6.2% in 2005.

Future Skills Needs

The following table lists the future skills needs within the Land-based Engineering industry:

| | |
|---|-------|
| Basic computing or Information Technology skills | 72.1% |
| Technical and practical skills | 67.4% |
| Planning and organising | 67.4% |
| Customer handling skills | 65.1% |
| Marketing and sales | 65.1% |
| Complying with other legislation | 65.1% |
| People management skills | 62.8% |
| Record keeping | 60.5% |
| Complying with employment legislation | 60.5% |
| Team working skills | 51.2% |
| Communication skills | 48.8% |
| Accounts | 46.5% |
| Literacy skills | 44.2% |
| Numeracy skills | 41.9% |
| Specialist computing skills associated with your business | 25.6% |
| Foreign language skills | 18.6% |
| Other skills | 9.3% |

Base: 43 businesses

The most commonly cited future skills need for businesses was basic computing or Information Technology skills reported by 72.1% of businesses. This was followed by technical and practical skills and planning and organising (both reported by 67.4% of businesses). The skills needs are similar to those cited in 2005; technical skills and IT/computing skills were ranked as the first and third most important future skill needs in that survey.

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Production Horticulture

Industry Profile

| Industry Profile | |
|-----------------------------------|-------|
| Number of establishments (sample) | 10 |
| Sole proprietorships | 60.0% |
| Business Size: | |
| 0 employees | 30.0% |
| 1-10 | 60.0% |
| 11-49 | 10.0% |

The Production Horticulture industry sample comprised of 10 businesses¹⁵², of which three fifths were sole proprietorships and two fifths were partnerships. Generally, the data suggests that businesses have become smaller since 2005. Almost one third of businesses are micro-businesses employing no staff (30.0%, cf. only 16.2% in 2005), three fifths employ 1-10 staff (cf. 67.5% in 2005) and a further tenth of businesses employ 11-49 members of staff (cf. 16.2% in 2005).

Only 3 businesses provided their turnover for the last financial year so details have been excluded due to data protection.

Workforce¹⁵³

| Workforce | |
|--|----------------|
| Total Employment (Working Owners/ Full-time/Part time employees) | 37 |
| Employees (Full-time) | 9 (40.9%) |
| Employees (Part time) | 13 (59.1%) |
| Casual/seasonal employees | 7 |
| Migrant workers employed during last 12 months | 5 |
| Male employees | 20 (69.0%) |
| Female employees | 9 (31.0%) |
| Age of working owners (highest banding %): Age 25-34 and 65+ | 4 (both 26.7%) |
| Age of employees (highest banding %): Age 35-44 | 9 (31.0%) |

¹⁵² While a full analysis has been carried out on the Production Horticulture industry, the numbers are low and therefore the results should be used with caution

¹⁵³ Data on gender (male employees + female employees) is based on full-time, part-time and casual/seasonal employment numbers but excludes working owners and migrant workers. Figures may not add up if estimated figures were provided

Total employment among the 10 businesses surveyed was 37. Over the past 4 years the proportion of part-time labour has increased within the industry such that almost three fifths of employees work part-time (59.1%, cf. 23% in 2005) and the use of casual/seasonal labour has decreased considerably since 2005. Almost three quarters of the workforce is male (69.0%).

The most common ages of working owners fell within two age ranges; 25-34 and 65+ (both 26.7%). For employees the most common age range was 35-44 years (31.0%).

Development

Surprisingly, half of all businesses surveyed said that training does not take place within the business. Only 20.0% of businesses said that training had been undertaken within the last two years and the amount of money spent on training was £1,000–£4,999.

When asked about barriers to training, the most highly endorsed barrier was *“all staff are fully proficient”* (40.0%) therefore businesses didn’t feel that training was needed. Other common barriers included, *“the financial cost of training”*, *“time is lost through training”*, *“lack of subsidy for training”* and *“lack of information about training opportunities”* (all of which were reported by 30.0% of businesses).

Four fifths of businesses did not have a written business plan or a written training and development plan. Just one fifth of businesses have a written business plan.

Skills needs, gaps and shortages

| Skills needs, gaps and shortages | |
|---|-------|
| Skills gap (% of establishments) | 0.0% |
| Current vacancies (% of establishments) | 10.0% |
| Hard-to-fill vacancies (% of establishments) | 10.0% |
| Skills shortage vacancies (% of establishments) | 0.0% |

No skills gaps were reported.

No skills shortage vacancies were reported.

Future Skills Needs¹⁵⁴

The following table lists the future skills needs within the Production Horticulture industry:

| | |
|---|-------|
| Basic computing or Information Technology (IT) skills | 77.8% |
| Literacy skills | 77.8% |
| People management skills | 66.7% |
| Technical and practical skills | 66.7% |
| Communication skills | 66.7% |
| Team working skills | 66.7% |
| Record keeping | 66.7% |
| Numeracy skills | 66.7% |
| Complying with employment legislation | 55.6% |
| Planning and organising | 55.6% |
| Specialist computing skills associated with your business | 55.6% |
| Problem solving skills | 44.4% |
| Complying with other legislation | 44.4% |
| Customer handling skills | 44.4% |
| Marketing and sales | 44.4% |
| Accounts | 44.4% |
| Other skills | 11.1% |
| Foreign language skills | 0.0% |

Base: 9 businesses

The most highly endorsed future skills needs for businesses were basic computing or IT skills and literacy skills (both reported by 77.8% of employers).

¹⁵⁴ Data on future skills needs has not been compared with 2005 data due to a low number of respondents (9 businesses in 2009)

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Trees and Timber

Industry Profile

| Industry Profile | |
|-----------------------------------|-------|
| Number of establishments (sample) | 13 |
| Sole proprietorships | 69.2% |
| Business Size: | |
| 0 employees | 46.2% |
| 1-10 | 46.2% |
| 11-49 | 7.7% |

The Trees and Timber industry sample comprised 13 businesses¹⁵⁵, of which 69.2% were sole proprietorships, 15.4% were partnerships and 15.4% were limited companies. All business operated in the private sector. The data suggests there has been a slight shift towards smaller business sizes since 2005; some 46.2% of businesses are micro-businesses employing no staff (cf. 31.1% in 2005), a further 46.2% employ 1-10 staff (cf. 57.7% in 2005) and a small proportion of businesses employ 11-49 staff (7.7%, cf. 11.1% in 2005).

The turnovers of the businesses ranged from under £10,000 up to £2m|–4.9m. Due to a small number of respondents, specific details on turnover have been excluded for data protection reasons.

Workforce¹⁵⁶

| Workforce | |
|--|------------|
| Total Employment (Working Owners/ Full-time/Part-time employees) | 47 |
| Employees (Full-time) | 29 (87.9%) |
| Employees (Part-time) | 4 (12.1%) |
| Casual/seasonal employees | 0 |
| Migrant workers employed during last 12 months | 7 |
| Male employees | 29 (87.9%) |
| Female employees | 4 (12.1%) |
| Age of working owners (highest banding %): Age 35-44 | 6 (42.9%) |
| Age of employees (highest banding %): Age 25-34 | 13 (39.4%) |

¹⁵⁵ While a full analysis has been carried out on the Trees and Timber industry, the numbers are low, therefore the data should be used with caution

¹⁵⁶ Data on gender (male employees + female employees) is based on full-time, part-time and casual/seasonal employment numbers but excludes working owners and migrant workers. Figures may not add up if estimated figures were provided

Total employment among the 13 businesses surveyed was 47. Almost 9 out of 10 employees were full-time (87.9%) and the same proportion was male.

The most common ages of working owners fell within the 35-44 age range (42.9%). For employees the most common age range was 25-34 years (39.4%) followed by 35-44 years (36.4%).

There have been no significant changes in the profile of the workforce since 2005.

Development

As in 2005, almost seven out of ten businesses said that training had been undertaken within the last two years. The amount of money businesses spent on training ranged from under £100 up to £5,000–£9,999, however, the most common amount of money spent on training fell within the range £1,000–£4,999 (42.9%).

When asked about barriers to training, the most highly endorsed barriers were *“all staff are fully proficient”* (therefore businesses felt that training was not needed) and *“the financial cost of training”* (both reported by 53.8% of businesses). Other common barriers included, *“time is lost through training”* and *“lack of subsidy for training”* (both reported by 38.5% of businesses), *“can’t find suitable training”* (30.8%), and *“training providers are located too far away”* (23.1%).

Just less than one quarter of businesses (23.1%) have a written business plan whilst 23.1% have a written business plan in addition to a training and development plan. As in 2005, just over half of the businesses (53.8%) do not have either type of plan.

Skills needs, gaps and shortages

| Skills needs, gaps and shortages | |
|--|-------|
| Skills gap (% of establishments) | 23.1% |
| Occupations reporting skills gaps (number not proficient): | |
| Skilled trade | 5 |
| Elementary | 1 |
| Machine operative | 1 |
| Current vacancies (% of establishments) | 7.7% |
| Hard-to-fill vacancies (% of establishments) | 7.7% |
| Skills shortage vacancies (% of establishments) | 0.0% |

Surprisingly, almost one quarter of businesses reported skills gaps (23.1%) compared to just 4.4% in 2005. By occupation, skills gaps were most commonly reported for those within skilled trade occupations. Employers reported the need for problem solving skills, team working, planning and organising and technical skills for those workers with skills gaps.

The proportion of businesses reporting vacancies and hard-to-fill vacancies was less than in 2005 and none of the businesses reported skills shortage vacancies (cf. 4.4% in 2005).

Future Skills Needs

The following table lists the future skills needs within the Trees and Timber industry:

| | |
|---|-------|
| Technical and practical skills | 91.7% |
| Complying with other legislation | 91.7% |
| Record keeping | 91.7% |
| Team working skills | 83.3% |
| Planning and organising | 83.3% |
| Customer handling skills | 83.3% |
| Literacy skills | 75.0% |
| Complying with employment legislation | 75.0% |
| Accounts | 75.0% |
| Basic computing or Information Technology skills | 66.7% |
| People management skills | 66.7% |
| Communication skills | 66.7% |
| Numeracy skills | 66.7% |
| Problem solving skills | 66.7% |
| Marketing and sales | 58.3% |
| Specialist computing skills associated with your business | 33.3% |
| Other skills | 25.0% |
| Foreign language skills | 25.0% |

Base: 12 businesses

Since 2005, the need for technical skills has increased and was reported as the most common future skills need, along with coping with legislation and record keeping (all reported by 91.7% of businesses). A small number of businesses said “other skills” were needed and cited the importance of forestry skills.

Veterinary Nursing and Ancillary Activities

Industry Profile

| Industry Profile | |
|-----------------------------------|-------|
| Number of establishments (sample) | 27 |
| Sole proprietorships | 40.7% |
| Business Size: | |
| 0 employees | 3.7% |
| 1-10 | 63.0% |
| 11-49 | 33.3% |

The Veterinary nursing and Ancillary Activities industry sample comprised of 27 businesses, of which 40.7% were sole proprietorships, a further 40.7% were partnerships and 18.5% were limited companies. Over three quarters of the businesses operate in the private sector (77.8) whilst 18.5% are public sector businesses. Over three fifths of the businesses employ 1-10 staff (63.0%) while one third employ 11-49 staff.

Many employers of private businesses either refused to provide their turnover or said they did not know. Of those who provided details, the turnovers ranged from £50,000–£99,999 up to £1m–1.9m. Due to a small number of respondents, specific details on turnover have been excluded for data protection reasons. For non-private businesses, only 2 businesses provided details on the budget for the establishment over the past 12 months. Again, for data protection, this information has been excluded here.

Workforce¹⁵⁷

| Workforce | |
|--|-------------|
| Total Employment (Working Owners/ Full-time/Part-time employees) | 271 |
| Employees (Full-time) | 148 (67.6%) |
| Employees (Part-time) | 71 (32.4%) |
| Casual/seasonal employees | 2 |
| Migrant workers employed during last 12 months | 5 |
| Male employees | 48 (21.7%) |
| Female employees | 173 (78.3%) |
| Age of working owners (highest banding %): Age 35-44 | 23 (44.2%) |
| Age of employees (highest banding %): Age 25-34 | 93 (42.1%) |

Total employment among the 27 businesses surveyed was 271. Over two thirds of employees were full-time (67.6%) and almost four fifths of employees were female (78.3%). The age profile of working owners was most commonly in the age 35-44 range (44.2%) and for employees the most common age range was 25-34 years (42.1%). Since 2005, the volume of casual/seasonal labour has decreased dramatically; however, there have been no other significant changes in the profile of the workforce.

Development

Over four fifths of businesses said that training had been undertaken within the last two years (81.5%, cf. 100% in 2005). The amount of money businesses spent on training ranged from £250–£499 up to £10,000–£19,999 and the most common training expenditure was £1,000–£4,999 (42.9%).

The most highly endorsed barrier to training was, *“the financial cost of training”*, reported by 51.9% of businesses. Other common barriers included, *“time lost through training”* (37.0%), *“training providers are located too far away”* (29.6%) and *“no cover is available whilst staff/I am being trained”* (25.9%).

Only 14.8% of businesses have a written business plan, 7.4% have a written training and development plan and 11.1% have both. Surprisingly, 70.4% of businesses do not have either type of plan.

¹⁵⁷ Data on gender (male employees + female employees) is based on full-time, part-time and casual/seasonal employment numbers but excludes working owners and migrant workers. Figures may not add up if estimated figures were provided

Skills needs, gaps and shortages

| Skills needs, gaps and shortages | |
|--|-------|
| Skills gap (% of establishments) | 11.1% |
| Occupations reporting skills gaps (number not proficient): | |
| Administrative and Secretarial | 6 |
| Personal service | 4 |
| Current vacancies (% of establishments) | 7.4% |
| Hard-to-fill vacancies (% of establishments) | 3.7% |
| Skills shortage vacancies (% of establishments) | 0.0% |

The proportion of businesses reporting skills gaps was less than in 2005. By occupation, skills gaps were reported for those working within administrative and secretarial and personal service occupations. The skills needed by these workers, as reported by employers are basic computing or information technology, communication and customer handling skills. The proportion of businesses reporting vacancies and hard-to-fill vacancies was less than in 2005 and no skills shortage vacancies were reported.

Future Skills Needs

The following table lists the future skills needs within the Veterinary Nursing and Ancillary Activities industry:

| | |
|---|-------|
| Customer handling skills | 95.5% |
| Communication skills | 95.5% |
| Team working skills | 95.5% |
| People management skills | 95.5% |
| Record keeping | 90.9% |
| Literacy skills | 81.8% |
| Complying with employment legislation | 81.8% |
| Complying with other legislation | 81.8% |
| Accounts | 81.8% |
| Technical and practical skills | 77.3% |
| Numeracy skills | 77.3% |
| Basic computing or Information Technology skills | 77.3% |
| Planning and organising | 77.3% |
| Marketing and sales | 68.2% |
| Problem solving skills | 63.6% |
| Specialist computing skills associated with your business | 45.5% |
| Foreign language skills | 18.2% |
| Other skills | 13.6% |

Base: 22 businesses

The most common future skills needs were customer handling, communication, team working and people management skills, all reported by 95.5% of businesses. Record keeping came a close second (90.9%). A small number of businesses said “other skills” were needed and cited the following needs:

“Vets...continually refreshing and updating their skills – compulsory.”

“Concentrate on vet nurses. They need skills with handling animals.”

Skills needs appear to have changed slightly since 2005; although communication skills and customer relations were ranked highly in 2005, the greatest need in 2005 was for health and safety and IT skills.

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9.0 Key Findings

This chapter draws together the key considerations from the report and presents these findings together with recommendations for actions – these are interventions to support the provision of appropriate education, skills and business management opportunities.

The industries and professions comprising the environmental and land-based sector share many common characteristics such as a high predominance of micro-businesses and a high proportion of working owners. The age of working owners is of interest as the findings reveal a high concentration of older workers within farming occupations. Anecdotal evidence would suggest that older farmers are disinclined to quit farming even in situations where financial returns are poor, preferring to seek off-farm employment to supplement their farming income.

For those business with vacancies or those engaged in succession planning, the impact of the recession and the reduced availability of employment opportunities in traditional industries such as construction and landscaping, appears to have eased recruitment problems in agriculture. The sector is now viewed as a more attractive employment option, with hard-to-fill and skills shortage vacancies at low levels.

An interesting finding from this area of study was that despite the differences between businesses, such as the type of farming operation or geographical location, general issues concerning business and management skills needs were remarkably similar.

In general, businesses appear to be able to articulate their current skills needs, but are less certain about future needs. However, those businesses that are clear on their choice of diversification, or have a written business plan are more able to articulate their future skills and business needs. Technical and practical related skills were not highlighted to the same extent by all industries throughout the survey. This may have been due to the assumption that compliance and the development of related technical skills, would naturally be provided through CAFRE College or other provisions in support of the industry, which has been the norm for a range of industries.

Similarities also exist with regard to barriers to skills development, business owners cite the financial cost and the loss of time associated with training as the most common reasons preventing them from providing more training. Findings from the survey reflect similar levels of agreement within the wider business and farming cluster with regard to the range of training available, its relevance to business needs and the preference for qualifications that lead to accreditation. However, findings appear unclear in this area, which may be due to a lack of knowledge of the training that is available. This is particularly true in farming and the development of skills of the current workforce to support economic growth. This conclusion is also supported by the comments from focus group participants who indicated that they rarely undertook training beyond that which is required for compliance.

There are a number of implications for action based on the findings outlined in this report. These implications are set out under the following headings:

- Tackling an ageing workforce
- Engaging with businesses
- Upskilling the workforce
- Embracing drivers for change

9.1 Tackling an ageing workforce

The age profile of the sector, and farming in particular where over a quarter of working owners are 65 years of age or older, is much older than that across Northern Ireland as a whole. These older farmers (65%) have limited qualifications with only 16% holding a qualification at levels 1, 2 or 3. Given the age profile, it is envisaged that over the next 10 years there will be a high replacement demand as owners and older workers retire.

There is also evidence from this research that the younger owners of family farms, which have been handed down from the older generation, are similar to their older counterparts, in that they hold few or no qualifications. The issue of succession is clearly of huge importance in terms of promoting and providing skills and educational development. Targeting current working owners and successors may provide the stimulus to encourage skills and educational acquisition, in both the younger and older generations. The development of clear career pathways would also be a way forward.

In addition, the sector as a whole is male dominated with men accounting for 73% of the sectors' workforce. This is significantly higher than the average for those employed across all sectors, which stands at 54%. The findings also reveal that farming is more male dominated than other parts of the sector, with men accounting for 80% of the workforce; enrolments are also high for men (see Table 3.2). The sector will need to make efforts to address gender imbalances.

The sector will also need to make efforts to attract new entrants of all ages, both for those leaving specialist education, and also by promoting sector opportunities to adults, women and career changers.

According to Working Futures III, in the longer term, there is an expectation that competition in the labour market will intensify with economic recovery. The sector therefore needs to attract the right quantity and quality of new entrants to replace those retiring from the sector. There is a need to ensure appropriate educational opportunities are available and that individuals have access to high quality careers information, advice and guidance, so that they can make informed choices about the sector.

Summary

The sector predominantly has an ageing workforce with a lack of recruitment of young people/new entrants into the sector due to no clear career pathways. Providing clear information about career entry, progression and professional development opportunities for potential and recent entrants into the sector could support the supply of new entrants and appropriately skilled workers of all ages.

Recommendations

- Good quality personal adviser/mentoring intervention is necessary to ensure new entrants and existing workforce have access to knowledge and improved skills to carry out the job
- Promote specific case studies of new entrants to endorse the benefits of working in the sector
- Promote career progression pathways within the sector, highlighting areas of overlap and transferable skills
- Introduce and deliver more level 1 qualifications for the sector aimed at potential new entrants, which allow progression to level 2 programmes
- Help with succession planning and promoting the value of skills development and business planning provided to the sector

9.2 Engaging with small businesses

The sector is characterised by a high proportion of small businesses, with 98% of businesses within the sector employing fewer than ten people. In addition, 76% of farms employ fewer than 3 people (including the working owner). Working owners form a significant proportion of the environmental and land-based sector's workforce. Within Northern Ireland they account for 52% of those employed in the sector. Within farming, working owners form an even higher proportion of the workforce, accounting for two thirds (66%) of those employed.

The existence of such a high proportion of working owners can be seen as an asset to the sector. However, they have an ageing profile and are generally less likely to hold recognised qualifications than the workers they employ. This is compounded by their attitude to skills and qualifications borne out in focus groups, which indicated that little value is attached to training and qualifications outside that which is required for legislative purposes and compliance. The attainment of recognised qualifications in the workforce is generally low, with 38% not holding any formal or recognised qualifications.

Given the perspective of (older) owner managers it is important that interventions to improve skills within the sector are promoted to this group so that they take on board the delivery requirements around the timing of such interventions and size of training programmes.

Summary

The sector has a large number of small businesses and working owners who have little commitment to, or experience of, qualifications.

Recommendations

- Small businesses and working owners should be offered tailor-made support to fit the needs of their business
- Dedicated support to provide a direct link to a trained adviser and/or website that can signpost support and training availability
- Develop case studies to promote the practical benefits of engaging in training and development
- Development of flexible training packages (in terms of hours, timings, delivery mode) so small businesses/working owners can access this more easily
- Sector specific support provided to develop business plans and training plans

9.3 Upskilling the workforce

Businesses appear to value skills that are learned “on the job” rather than taught through formal courses and recognised through formal qualifications. When recruiting for vacancies it is evident that there is currently a lack of value placed on qualifications and training, and their role in the skills development of the current workforce, especially in farming. Those in employment need to be appraised of the skills development opportunities, not just in terms of complying with legislative and supply chain requirements, but also in respect of knowledge and technology transfer.

While the apparent low incidence of businesses providing training and using qualifications may indicate a lack of understanding of the qualifications system and awareness of what specific training support is available to industry, it is necessary to appreciate that the sector is also identifying future skill requirements and the need for other qualifications or skills recognition as increasing in importance.

However, it is also important to recognise that qualifications are only a proxy measure for skills. A low level of qualifications in the workforce may not necessarily mean skill levels are low. Businesses may value skills that are learned “on the job” rather than through formal courses.

Much of the training that does occur is legislative driven or funded by DARD. Whilst the supply of this "free" training is valued by businesses, this may mean that they do not appreciate the added value of what they receive. Businesses may perceive that other training opportunities are, in comparison, expensive and may be less inclined to take them up.

Training levels, as indicated by the survey, are very low within the sector. Just under half (47.1%) of businesses reported that they have never funded or arranged training for their staff. This is despite the fact that the majority of businesses have positive views on the training that is available, and the skills that leavers from the education system have developed. A possible explanation for the low levels of training is that respondents associate the word "training" with formal courses or those leading to recognised qualifications and do not take into account more informal methods such as manufacturer updates or technology transfer events. In addition, very few businesses (4%) had a business, training or a development plan and this is recognised as a current and future skills need.

The most commonly cited reasons by businesses for not training were cost, time taken up by training and that staff did not require any training. A lack of information on the courses that are available and the appropriateness and quality of training provision were also factors identified by survey respondents.

Skills gaps in the workforce are more of a concern to businesses. It is estimated there are 5,350 (extrapolated for the sector as a whole) people currently working in the sector who are not yet proficient in their roles. This equates to 8% of the total workforce, although skills gaps are mostly concentrated in skilled trade roles, which would typically require level 2 or 3 qualifications.

The high level of part-time workers suggests that people working in agriculture will need to develop non-farming skills. Programmes such as the multi-skilling programme¹⁵⁸ currently run by CAFRE would appear to be a good model to address these requirements. In addition to the multi-skilling programme, it is important that knowledge and technology transfer is appropriately disseminated and included in training and development solutions. This will enable the sector to develop processes and products that will support the sustainability of sector businesses.

Summary

There is limited commitment from employers in recognising the value of training and qualifications for them, their employees and their business. There appears to be a need to raise the profile and recognition of formal and informal training across the sector.

¹⁵⁸ Please refer to the Assessment of Current Provision for Northern Ireland 2010 (Lantra)

Recommendations

- A high-level awareness campaign to promote the value of training and skills to businesses in the sector, including information on the timing and frequency of courses
- Engaging more employers in the design and delivery of training programmes would aid a shared ownership of programme development and its outcomes and give added value
- Mechanisms to capture and record the informal learning that is undertaken should play a role in skills development and its recognition
- Systems should be developed to capture and record continuing professional development to demonstrate its value
- A focus on long-term personal adviser/mentors who have sector-specific knowledge to provide ongoing support
- Short courses and case studies should be available to enable employers to see the benefits of having business, training and development plans
- There is a need to de-clutter and streamline the number of support and training products so that businesses have one source of advice
- A campaign to generate awareness and signpost businesses to available support

9.4 Embracing Drivers of Change

The set of drivers that are impacting on the sector suggest that tomorrow's farmers, growers, those caring for our environment or those involved in animal health and welfare will need to have a mix of high level technical skills as well as business management skills because some of the impact of issues such as climate change are yet to be defined. There is little consensus about exactly what changes will occur in the next five years, both for businesses in general, and more specifically in terms of skills.

The degree of change occurring within the environment and land-based sector is significant. This suggests that skills relating to managing change are essential to the running of a successful business. These changes provide a driver for the increased professionalism of the sector. Given the high demand for business management and business development skills, ensuring a greater engagement from business advice and guidance organisations would better support businesses in analysing their skills needs.

There appears to be an increasing demand for business management skills across the sector due to the dominance of small businesses, and the high levels of self-employment (see Chapter 4). While it is difficult to develop detailed plans for future skills requirements, the drivers for change provide an indication of the types of skills that are likely to increase in importance. For example, within agriculture the move towards more environmentally sensitive, low-carbon farming indicates that there will be a need to raise skills levels in the sector in areas concerned with anaerobic digestion and land management.

There is strong evidence that jobs are becoming increasingly skilled within the sector (see Chapter 4). Businesses have been able to become more efficient, developing new methods and applying new technologies, leading to a decline in the number and proportion of lower-skilled roles. This presents a significant challenge in up-skilling the existing workforce both because of the economic outlook when finance for training may be scarce and because of the attitudes to training highlighted in the report.

The survey has shown that diversification will become more apparent (see Figure 17, Section 4.3). Such diversification frequently involves a higher value-added component, for example, in leisure and tourism where a move towards increased customer contact and retail functions would be required.

Looking to the future, there are mixed views on the types of skills that will become more important. Skills associated with running a business such as marketing, sales and financial skills including accounts, record keeping and information technology are frequently cited as required. Management and leadership skills are also cited as a key factor in managing a modern business, in particular these are people management skills, communication skills and complying with legislation.

Summary

There is a changing skill mix as job roles are broadened and re-defined due to diversification, therefore some jobs will have to take into account the requirements of legislative, technological and climate change needs.

Recommendations

- Promote the importance of leadership and management skills across the sector.
- Communicating future changes that the sector is likely to face and the need for skill changes
- Develop support programmes for businesses to explore climate change technologies
- Ongoing research and evaluation of the sector to improve skills and education provision that reflects business priorities

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Appendix A – SIC/SOC footprints

| SIC 2003 | Description |
|----------|---|
| 0100 | DEFRA/Scottish Executive Agricultural Data |
| 0111 | Growing of cereals and other crops not elsewhere classified |
| 0112 | Growing of vegetables, horticultural specialities and nursery products |
| 0113 | Growing of fruit, nuts, beverage and spice crops |
| 0121 | Farming of cattle, dairy farming |
| 0122 | Farming of sheep, goats, horses, asses, mules and hinnies |
| 0123 | Farming of swine |
| 0124 | Farming of poultry |
| 0125 | Other farming of animals |
| 0130 | Growing of crops combined with farming of animals (mixed farming) |
| 0141 | Agricultural service activities |
| 0142 | Animal husbandry service activities, except veterinary activities |
| 0150 | Hunting, trapping and game propagation including related service activities |
| 0201 | Forestry and logging |
| 0202 | Forestry and logging-related service activities |
| 0502 | Operation of fish hatcheries and fish farms |
| | Wholesale of agricultural machinery and accessories and implements, including |
| 5188 | tractors |
| 8520 | Veterinary activities |
| 9253 | Botanical and zoological gardens and nature reserve activities |

It is important to note that SIC 2003 codes provide a narrow definition of the sector. Some of the industries within the sector cannot be defined in terms of SIC code, such as fencing, floristry, animal care, animal technology, equine, farriery, environmental conservation, fisheries management, and game and wildlife management.

| SOC 2000 | Description |
|----------|--|
| 1211 | Farm Managers |
| 1212 | Natural Environment and Conservation Managers |
| 1219 | Managers in Animal Husbandry, forestry, fishing n.e.c. |
| 2216 | Veterinarians |
| 3551 | Conservation and Environmental Protection Officers |
| 3552 | Countryside Rangers |
| 5111 | Farmers |
| 5112 | Horticultural Trades |
| 5113 | Gardeners and Groundsmen/women |
| 5119 | Agricultural and Fishing Trades n.e.c |
| 5496 | Floral Arrangers, Florists |
| 6131 | Veterinary Nurses |
| 6139 | Animal Care Occupations n.e.c |
| 8223 | Agricultural Machinery Drivers |
| 9111 | Farm Workers |
| 9112 | Forestry Workers |
| 9119 | Fishing and Agricultural Occupations n.e.c |

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Appendix B – Outline of business unit and employment sources

This appendix provides details of the sources used to develop the business and employment numbers quoted in this publication. Lantra uses Official Statistics wherever possible. Official Statistics used include the Inter-Departmental Business Register (IDBR), Labour Force Survey (LFS) and the DARD's June Agricultural Survey.

Official Statistics cannot be used for industries which cannot be defined in terms of SIC codes (see Appendix A). For these industries we use a mix of sources. The most common source used for these purposes is the Experian National Business Database.

All of the figures quoted by Lantra have gone through a rigorous quality assurance process. A variety of sources are used to triangulate evidence where there are gaps in Official Statistics. All of the figures have been discussed and sense checked with Lantra's Industry Advisory Groups.

| Industry | Source | Definition (SIC unless stated) |
|-------------------------|---|--|
| Agricultural Crops | - IDBR (Businesses) - June Agricultural Survey, Government Agricultural Departments (Employment) | 0111 0130 – Mixed farming has been divided between crops, livestock and production horticulture, at a regional level, based on the size of each industry. |
| Agricultural Livestock | - IDBR (Businesses) - June Agricultural Survey, Government Agricultural Departments (Employment) | 0121 0122 0123 0124 0125 0130 (part) |
| Production Horticulture | - IDBR (Businesses) - June Agricultural Survey, Government Agricultural Departments (Employment). - Garden centre businesses have been added using membership details from the Horticultural Trades Association (HTA) | 0112 0113 0130 (part) |
| Aquaculture | - IDBR (Businesses) - LFS (Employment) | 0502 |
| Trees and Timber | - IDBR (Businesses) - LFS (Employment) | 0201 0202 |
| Fencing | - Experian National Business Database | Yellow Pages Classification for Fencing Contractors |

| | | |
|---|---|---|
| Floristry | - Experian National Business Database (Businesses) - LFS (Employment) | Yellow Pages Classification for Florists (Businesses) SOC 5496 (Employment) |
| Land-based Engineering | - IDBR (Businesses) - LFS (Employment) | 2931 2932 5188 7131 (Can't see this in list above.) |
| Animal Care | - Experian National Business Database | Yellow Pages Classifications for Animal Carrier Services, Animal Welfare Organisation, Bird Breeders, Boarding Kennels and Catteries, Cat Breeders, Dog Breeders, Dog Clipping and Grooming, Dog Training, Pet Services (e.g. Walking, Boarding at home), Pet Shops, Rabbit Breeders, Wildlife Parks, Zoos. |
| Animal Technology | - Institute of Animal Technology licensed businesses (Businesses) - Institute of Animal Technology licensed practitioners (Employment) | |
| Equine | - Experian National Business Database | Yellow Pages Classification for Riding Schools, Racehorse Trainers, Racing Stables, Riding Stables |
| Farriery | - Farriers Registration Council, Register of Farriers (all Farriers have to be registered by law. | |
| Veterinary nursing and ancillary activities | - IDBR (Businesses) - LFS (Employment) | 6131 |
| Environmental conservation | - Experian National Business - Database (Businesses) - LFS (Employment) | Yellow Pages Classification for Environmental consultants. SOC 1212, 3551, 3552 (Employment) |
| Game and Wildlife Management | - British Association for Shooting and Conservation, Shooting Sports – Findings of an economic and environmental survey – PACEC 2006 | Note: Businesses defined as providers who operate for business reasons Note: Employment numbers are Full Time Equivalents. |
| Fisheries Management | - Experian National Business Database | Yellow Pages Classification for Angling Clubs |
| Horticulture, Landscaping and Sports Turf | - Experian National Business Database (Businesses) - LFS (Employment) | Yellow Pages Classification for Landscapers, Garden Services and Parks and Gardens SOC 5113 (Employment) |

Appendix C – Northern Ireland based participants in focus groups, the CAFRE College Advisory Group, and in-depth interviews

Lantra would like to thank the following representatives who contributed to this research:

Farming Focus Group (February 2010), with representation from:

Arable and commercial horticulture
Farming and Wildlife Advisory Group
National Beef Association (3 representatives)
National Sheep Association
Organic sector
Pig and Poultry Sector

Focus Group (March 2010), with representation from:

Animal Welfare Federation NI
Association of Landscape Contractors, Ireland ALCI (2 representatives)
British Association of Shooting and Conservation
CAFRE (2 representatives)
Department for Employment and Learning
Equine Council/Northern Ireland Horse Board
Fencing Sector
Horticulture Forum
Northern Ireland Forest Service
Tele-florist
Ulster Farmers Union
Veterinary Sector

Equine Focus Group (May 2010), with representation from:

British Horse Society
CAFRE
Northern Ireland Horse Board
Pony Club
Thoroughbred Breeders Association

CAFRE College Advisory Group (CAG), with representation from:

Amenity Horticulture
Beef and Sheep
Dairy
Education
Environmental Conservation
Equine

In-depth interviews, with representation from:

Northern Ireland Agricultural Producers' Association
Ulster Farmers' Union (3 representatives)

Annex D Focus Groups

Farmers' Group February 2010

Farmers were asked what type of training or skills development was required?

In response to these questions focus group participants cited the following developmental needs:

- Tractor and machinery handling
- Ploughing
- Driving modern tractors
- Condition scoring
- AI (Artificial Insemination)
- Grass budgeting
- VAT on line
- IT courses (Information Technology)
- Jeep and trailer courses for people who have passed their driving test post 1997
- Condition scoring for cattle

The majority of focus group participants highlighted jeep and trailer courses, tractor handling, artificial insemination, grass budgeting and IT courses as being key training needs. These skill areas were commented on in terms of improving business practices, record keeping and profitability. The training requirements discussed also reflected the need to meet, or remain within, current legislative requirements both in terms of machinery usage, health and safety and those related to business practices such as VAT returns.

Farmers were also asked where they currently obtain relevant training; in response all of the participants highlighted CAFRE College as the main supplier. A number of the participants stated, *"I don't think it's necessary to the farming industry"*. Others said, *"I don't have any qualifications, not even a GCSE, and I think I'm well capable of running a farm"*. Similarly others expressed, *"Paper is no good to you; it's the way you do it."* *"Farmers learn by doing – experience is worth more than any qualification"* and *"Well you learn a lot growing up on a farm."* Others reflected that, *"Those from 8-10 years ago need re-skilling but a lot of older farmers are not happy to go"* or *"A lot of the farmers that I know are of a fair age, you are going to have problems getting them to go to Greenmount, or getting them on a course. Now, what was effective, certainly in our area was the local discussion groups, where training was brought to them."*

The timing of training was also discussed with a number of the participants suggesting certain times of the year were not ideal for the farming industry; comments from these discussions included, *“There are not as many short courses available as there used to be”* to *“I put my name down in September to do a computer course and they were not running any until January.”* *“Farmers want to be training from October to December, because that’s the time of the year that suits them better. Once you come to this time of the year [February] they don’t want training.”*

The focus group participants were also asked about what specific training they had funded, in response to this question none of the attendees had funded training and had only undertaken training that was freely available. One of the participants summarised this by stating: *“Farmers don’t want to pay for training; they either don’t pay for it, or don’t do it.”*

Barriers to Training

The focus group attendees were asked if there were specific barriers to skills and training development. The majority of the participants cited the time of year training was offered and the cost of training both in terms of down time and finding suitable staff cover. Others believed that age, distance to the training provided, a lack of enthusiasm, time pressure on younger farmers and the limited number of short courses available were key issues. Course awareness was also cited, with the majority of the participants agreeing on this issue, which was summarised as follows, *“A lot of farmers aren’t ignoring training and courses, they don’t even know what’s there to ignore”*.

Others reflected that, *‘Many farmers are unsure of what training and skills development they need; they don’t know what they don’t know’*, It was also suggested by a number of the participants that this could be as a result of the isolatory nature of farming.

On overcoming some of the aforementioned barriers to training the focus group discussion centred on the following:

- Practical skilling, where possible, to be undertaken by professional industry personnel on the farm and only combined with classroom studies where necessary
- Communication and support for industry bodies to persuade farmers on the benefits of training to include awareness of changing techniques and courses available. Participants generally agreed that monitor farms may help in this area as used in Scotland and New Zealand, this would also include the social element and information sharing with participating farmers
- Awareness of restrictions to businesses that don’t have training and what the training needs are for that particular business, were also cited as being necessary

Courses vs. Informal learning

In wider discussions around formal or informal learning, participants commented on Focus Farms* and Monitor Farms**. Participants had mixed views on focus and monitor farms; with those who had visited a focus or monitor farm elsewhere (outside of Northern Ireland) describing the current local system as not ideal. These participants commented that:

“Effective Monitor Farms have an active board of 40 to 50 people, closely associated with the decision making. Where a guy has some potential, but isn’t making it, largely through lack of knowledge, they can dramatically increase performance by being open and sharpening decision taking over 4 to 5 years. Lots of the DARD Focus Farms would tend to be ‘showpiece units’. Others reflected: “I’ve been to a few focus farms and it’s a day out, that’s all it really is. You don’t learn anything often, they are a good idea, but they have been implemented badly. What needs to happen is that the focus farms try new techniques which the rest of the group could learn from. What happens now is that they stand up and say, ‘this is what I do; this is the way to do it.’”

Conversely other participants commented on the positive benefits of focus farms, with one of the attendees commenting:

“They started off to bring together people from the different communities here. They were very successful, even in my own situation there were neighbours I had who were the opposite tradition to me. You were always friendly enough, but now you talk to them more regularly, you’ll be going to things together.”

Another participant commented on his personal experience of being a focus farm and said:

“In terms of my farm’s performance I think it did help. You take people round and show them your system. And you don’t tell people that this is the way you do it, you tell them, sort of, this is the way I do it. And people ask you questions. It makes you think about what you are doing and why you are doing that. You think I’m doing this or that because it’s the way my dad done it, and that’s the way I’ve always done it. Where as you end up challenging yourself more because you have to, sort of, explain yourself.”

*<http://countrysiderural.co.uk/focusfarms/>

**http://www.ruralni.gov.uk/index/livestock/grass_and_clover/grass_clover_farm_project.htm

With regard to Monitor farms one of the participants' said:

"I've been involved with some of the Monitor Farms, and I do see it as a better concept than Focus Farms. You have two types of training. You have the young person going through the Greenmont College – but how do you get to the farmer who is on the ground working 80 hours a week. The Monitor Farms provide an opportunity to help farmers as they get them to pull together and work together. Giving the farmer the chance to speak with each other so that they are not just speaking to commercial people who are not objective to the farmer's needs is more beneficial. Monitor farms may not reach the same amount of people as a Focus Farm day out; however, they do pull a group of people who are more interested in the specific topic".

Challenge Programmes***

Other areas of discussion by the group include the Challenge Programmes as undertaken through CAFRE College. Participants commented on the range of topics on offer to include: business skills, diversification, animal health, and grass challenge. Farmers generally agree that the challenge programmes are providing expert help to a group. One participant said

"The one [challenge programme] I did was on animal health. It was quite basic but you had a qualified vet who ran through various aspects. It gave you a better understanding of the basics. I think you achieved part of an NVQ at the end of it".

Others commented on IT training and its benefits; one participant stated *"An IT, course with six hours home mentoring into units, meant that the person came and saw you and tailored the course to your individual needs".*

*** <http://www.cafre.ac.uk/index/information-for/industry/industry-training/sc-challenges.htm>

Participants were asked to comment on what skills and attributes they considered to be important when recruiting?

The following areas were highlighted:

Knowledge:

- Readiness to accept new technologies
- Understanding of livestock
- Environmental objectives
- Stockmanship
- Timekeeping

Skills:

- Pleasant personality
- Open-mindedness
- Handling livestock
- Driving – able to drive a tractor
- Ability to carry out work on own initiative
- Ability to learn from mistakes
- Flexibility
- Stockmanship
- Good attitude to work

Experience:

- Being a farmer's son or a farmer
- Good stockmanship
- Honesty
- Willing to work farm hours
- Record keeping ability
- Common sense

Fairly often recruit from people who have a farming background:

- Desire to be in the industry but not worked in the background
- Bringing in contractors to do work
- Casual labour rather than full time
- Team worker

Specific things missing or needed from labour taken on at farm:

- Some just want to work to get the money
- Don't take specific instructions like staying away from the water course
- May not pick the right person, some are not suited – if casual you can choose not to employ again
- Good team player required
- Trust/confidence in the person
- Pride in work
- There tends to be a good stockman but not particular good with machinery and vice versa
- Honesty and personality, trust is more important and can get hold of these people but have to be careful who you choose
- Tends to be a lot more qualified and conscientious people who are looking to work on the farm since the fall in other areas of industry – but the farmer may not be able to employ that person due to rates of pay

Focus group participants were asked to look towards the future and comment on what issues they believed would have an impact on the sector.

The following extracts represent the participant's views:

"We need a lot more fresh people coming into the industry. There will be a lot of natural wastage, which will take a lot of people out over the next 10 or 15 years. In the livestock industry there is only a certain amount of mechanisation can take place...If it's livestock, it equals people so there will be demand for a lot more people coming into the industry. In essence we need more folk coming in as staff rather than farmers/landowners. We need half the farms to go out of business to give the others a chance to go on."

"There is a brighter future than there has been for some time. Number one, is that government, not just here but in the south of Ireland, is beginning to realise that agriculture is important. Food security, 2 years ago ministers across the water would have laughed at you if you mentioned food security. Now it is higher up their priority list."

"I think there will be less farmers. A farmer who farms 50-60 acres and thinks he's busy, but there isn't the amount of man-hours to do that. At the same time he is not really productive enough at that size. Farms will get bigger and farmers will get fewer. That will be good for the industry because we can't justify the amount of farms that there is."

"As farms get bigger there will be more opening for contractors. If you are running a bigger farm, your job will be managing livestock. You will look to bring in people to do those other jobs."

"The whole industry is going to need to be better business managers. I think the industry will become a lot more productive. Earlier we were talking about grass budgeting and I think our general standard of pasture management is poor. Personally speaking I don't think we can have enough skilled people. Really good people will make room for themselves."

"With the downturn in the building industry there are people now considering agriculture which years ago wouldn't."

A contrasting view was also expressed that qualifications were not required for farming; with one participant stating *"No qualifications will be required."*

Focus Group March 2010

This focus group discussion was led by industry representatives and sought to explore the types of training undertaken across the range of sectors represented, to include Horticulture, Fencing, Trees and Timber and Equine. The group also explored what the attributes an “ideal candidate” would possess and what the future challenges may be for their particular industry.

Horticulture

Operatives on ground level receive basic levels of training in operation of machinery, horticulture skills (delivered in-house, funded by company).

External training undertaken with BEMAC; to include diggers, health & safety, CSR cards, telescopic handlers, risk assessments, dumper driving and abrasive wheels.

Management training – ILAM course (funded by company).

Previously sent employees to Greenmount to complete an NVQ Level 2 in horticulture – felt this didn’t meet business needs and was costly.

Trees and Timber

Training is “part and parcel” of employment with Forest Service, usually delivered at CAFRE, and on occasions at designated sites for tree felling. Anyone who needs training gets it.

Ideal Candidate

Fencing

Usually know in the first week if someone is suitable. Start on a low wage and then increase wages if deemed worthy.

Horticulture

Raw material in people looking for work – if they have a reasonable track record in terms of employment then this is the starting point – zero skills. Use induction to hammer home what is expected.

If criteria were set for horticulture would have fewer applicants.

Equine:

The industry looks for skill and knowledge in people. Lack of practical experience often displayed. Most jobs involve the use of a shovel and the person needs to have “the right work ethic”.

The future

- Global warming/climate change/cycles in farming
- Food shortage/supply and demand
- Animal welfare/legislation
- More staff needed if pesticides banned. Piloting use of herbicides.
- Higher expectation from customers
- Higher level of interpersonal skills
- Economic climate – need to be less wasteful
- Bring in contractors for seasonal work
- Contract management skills

Equine Focus Group May 2010

Participants were asked what are the key issues that are currently impacting/will impact on businesses in terms of profitability/efficiency/ survival/ability to compete and develop?

The following responses highlight the generic factors impacting on the equine businesses:

- Expenses have gone up and income may come down
- Production of horses has fallen due to the economic conditions
- Would take on students if they had funding, equine qualifications are excluded from work programmes
- Modern Apprenticeships – scheme on a minimum or training wage – employers not prepared to do this as they can bring in someone on minimum wage without having to train
- Environmental laws are changing and this may have an impact on equine industry especially new laws on muck heaps
- Legislative waste management
- Transport legislations now in but some issues regarding people towing trailers etc, having to do tests now. People are not that good at reversing trailers and perhaps this needs to be addressed. New entries to the industry may be towing illegally. Lack of clarity around the transport issues is an issue

- Big impact on sustainability and liaison of environmental impact. Lots of legislation being brought in and equine could be just pulled into it without any planning
- Insurance still a problem, Insurance is expensive and the paper trails required are stringent which some yards are not good at keeping up with it
- Lot of people functioning without employer liability insurance
- Rates issues agricultural management – DARD has not addressed this issue as yet
- Farmers getting RDP money to diversify and it's impacting on the equine industry which is not helping riding schools as they are not getting the same sort of help
- The industry does have to have regulations and it would be wrong not to have as riding schools need to be regulated. However the attitude of inspecting agents is not always helpful

What are the training needs for the business owner and staff to address these issues?

- Customer care skills required
- Induction packs required
- Contract of employment
- Interviewing skills
- Websites and e-mail training (IT skills)
- People running equine have had limited formal training
- Health and safety training
- Generic business/management skills
- Finance
- Knowledge of where you can get the information from (list of contacts to get help and support)
- Legislation training and awareness to included risk and disability
- Child Protection
- Not got time to do training – as many are working owners and have limited free time or staff to cover time off the job
- Need to offer more small short courses over 2 hours in evening

Skills passports were discussed by the group, as a way of developing and tracking skills for both managers and grooms. A number of participants stated that, *“Many grooms are working in the industry however, if they leave their job how do they prove they are capable to do the job”*. Skills Manager was discussed as a potential solution for skills development and tracking to support industry managers and grooms.

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Appendix E – Lantra/ DARD business survey questionnaire

Good morning/afternoon, is that <INSERT NAME OF EMPLOYER>?

My name is <INSERT NAME> and I am calling on behalf of Lantra who are working with the Department of Agriculture and Rural Development

(INTERVIEWER NOTE – PREASSESS IF THE BUSINESS IS FARM OR NON-FARM)

A) NON-FARM BUSINESSES ONLY: CAN I SPEAK TO THE PERSON RESPONSIBLE FOR TRAINING AND RECRUITMENT PLEASE?

B) FARM BUSINESSES ONLY: CAN I SPEAK TO THE PERSON IN DAY-TO-DAY CHARGE OF THE FARM BUSINESS?

We are conducting a research project into the requirements of businesses for training and skills development. The information will be used to influence training provision to ensure it meets the skills needs of businesses. It will help DARD to develop its Education Strategy.

All information collected will be treated in the strictest confidence.

The interview will take on average 20 minutes. Would it be convenient to conduct the interview now?

[IF NOT CONVENIENT] Could I call you back?

IF NECESSARY:

The **Department of Agriculture and Rural Development (DARD)** aims to promote sustainable economic growth and the development of the countryside in Northern Ireland.

Lantra is the Sector Skills Council for the environmental and land-based sector and is licensed by government to boost skills levels and productivity across the UK. Its role is to help support businesses like yours by ensuring that training provision meets your needs.

- Contact at Lantra is David Seffen if they would like to find out more about the survey (028 79631304)

- DARD have provided details of Farm businesses and other Establishments have been randomly chosen from British Telecom Yellow Pages and Thompson's Directories (owned by Experian)

RECORD ALL REFUSALS:

| | |
|---|---|
| Refusal (company policy) | 1 |
| Refusal (taken part in other survey recently) | 2 |
| Nobody at site to able to answer questions | 3 |
| Not available in deadline | 4 |
| Refusal (no reason given) | 5 |

SECTION A: BUSINESS DETAILS

A1-A3 ASK FARM BUSINESSES (CHECK AGAINST DARD CONTACT DETAILS)

A1. What are your main farm enterprises?

ADD IF NECESSARY:

By "main" we mean what is the biggest enterprise by number or area.

Read out, if necessary, code only one

| | |
|------------------------|----|
| Cereals | 1 |
| Potatoes | 2 |
| Horticulture | 3 |
| Pigs | 4 |
| Poultry | 5 |
| Dairy | 6 |
| Beef cattle | 7 |
| Other cattle | 8 |
| Sheep | 9 |
| Mixed | 10 |
| Other (please specify) | 11 |

A2. Is your business involved in any farm diversification activity? Yes No D/K

| | | |
|---|---|---|
| 1 | 2 | 3 |
|---|---|---|

IF YES AT A2

A3. What activities are you involved in?

DO NOT READ OUT – CODE ALL THAT ARE MENTIONED

| | |
|--|---|
| Letting of buildings for non-farming use | 1 |
| Processing of farm produce | 2 |
| Sale of farm produce e.g. farm shops | 3 |
| Sport and recreation | 4 |
| Tourist accommodation and/or catering | 5 |
| Light engineering | 6 |
| Agricultural contracting | 7 |
| Other (please specify) | 8 |

*FARM BUSINESSES GO TO A7***A4-A6 ASK NON-FARM BUSINESSES****I would like to begin by asking you some general questions about your business.****A4. What exactly is done in this business? A1**

PROBE AS NECESSARY:

What is the main product or service?

What exactly is made or done?

What material or machinery does that involve using?

a *WRITE IN***A5. Which of these industries would you say A2
the business mainly fits into?***[Read out and code only one]*

| | | | |
|----------------------------|---|----------------------------------|----|
| Animal technology | 1 | Fisheries management | 9 |
| Aquaculture/fish farming | 2 | Game & wildlife management | 10 |
| Animal care | 3 | Land-based engineering | 11 |
| Equine | 4 | Landscaping/amenity horticulture | 12 |
| Environmental conservation | 5 | Veterinary nursing | 13 |
| Fencing | 6 | Production horticulture | 14 |
| Farriery | 7 | Trees and timber | 15 |
| Floristry | 8 | | |

A6. Would you classify this establishment as... **A3**

[Read out and code only one]

| | |
|---------------------------------|---|
| A private sector business | 1 |
| A public sector business | 2 |
| A voluntary sector organisation | 3 |
| Other [write in] | 4 |
| Don't know | 5 |

ASK ALL

A7. Is the business... *[Read out and code only one]* **A4**

| | |
|----------------------|----|
| Under sole ownership | 1 |
| A partnership | 2 |
| A limited company | 3* |
| Other [take details] | 4 |
| Don't know | 5 |

**IF 'Sole ownership', CODE '1' AT A8 AND SKIP TO A9*

A8. How many working owners are there in this business? **A5**

| |
|--|
| |
|--|

A9. How many working owners are in each of these age groups?

[Write in figures]

| 16-19 | 20-24 | 25-34 | 35-44 | 45-54 | 55-64 | 65+ |
|----------|----------|----------|----------|----------|----------|----------|
| 1 | 2 | 3 | 4 | 5 | 6 | 7 |

A10. I'd now like to ask you about your workforce.

ASK FARM BUSINESSES

I am interested in farm workers (paid and unpaid) who are not working owners.

ASK NON FARM BUSINESSES

I am interested in those who work in the business, please do not include working owners in this total.

a) How many are [substitute group below]?

b) Can I ask how many of those are male / how many are female?

[Write in figures]

| | (a) | (b) | (c) |
|-----------|-------|------|--------|
| Group | Total | Male | Female |
| Full-time | | | |
| Part-time | | | |
| Seasonal | | | |

INTERVIEW NOTE – FULL-TIME 30 HOURS PER WEEK OR MORE

PART-TIME LESS THAN 30 HOURS

SEASONAL LESS THAN 20 WEEKS

ASK ALL

A11. How many workers excluding working owners do you employ in each of the following age categories?

[Write in figures]

| 16-19 | 20-24 | 25-34 | 35-44 | 45-54 | 55-64 | 65+ |
|----------|----------|----------|----------|----------|----------|----------|
| 1 | 2 | 3 | 4 | 5 | 6 | 7 |

ASK ALL

A12. Over the last twelve months how many migrant workers did you employ?

If required – we are defining migrant workers as those who come from outside the UK or Ireland.

[Write in figures]

| | (a) | (b) |
|-----------|--------------|-----|
| Group | Total Number | D/K |
| Full-time | | |
| Part-time | | |
| Seasonal | | |

A13. Which countries do your migrant workers come from?

| |
|--|
| |
|--|

SECTION B: QUALIFICATIONS

ASK ALL

| B1. Do you hold any qualifications? | Yes | No | D/K |
|-------------------------------------|-----|----|-----|
| | 1 | 2 | 3 |

B2. What is the highest level of qualification you hold?

Prompt from below, if necessary

| | |
|--------------------------------|---|
| Masters or Higher Degree, PhD | 1 |
| Degree, NVQ Level 4 | 2 |
| A level, Diploma, NVQ Level 3 | 3 |
| GCSE 5 Grades A-C, NVQ Level 2 | 4 |
| GCSE Grades D-G, NVQ Level 1 | 5 |
| Other (please specify) | 6 |

b Specify Title of Qualification

| |
|--|
| |
|--|

INTERVIEWER NOTE - FARM BUSINESSES ONLY - Where A8 is more than 1

| B3. Do any of the other working owners hold any qualifications? | Yes | No | D/K |
|---|-----|----|-----|
| | 1 | 2 | 3 |

If yes, please provide details of the highest level of qualification held:

Prompt from below if necessary

| | |
|--------------------------------|---|
| Masters or Higher Degree, PhD | 1 |
| Degree, NVQ Level 4 | 2 |
| A level, Diploma, NVQ Level 3 | 3 |
| GCSE 5 Grades A-C, NVQ Level 2 | 4 |
| GCSE Grades D-G, NVQ Level 1 | 5 |
| Other (please specify) | 6 |

c *Specify Title of Qualification*

INTERVIEWER NOTE - ASK ALL

B4 What are your workers current qualifications?

| Level | Code | Number of workers | Details |
|--------------------------------|------|-------------------|---------|
| Masters or Higher Degree, PhD | 1 | | |
| Degree, NVQ Level 4 | 2 | | |
| A level, Diploma, NVQ Level 3 | 3 | | |
| GCSE 5 Grades A-C, NVQ Level 2 | 4 | | |
| GCSE Grades D-G, NVQ Level 1 | 5 | | |
| Other (please specify) | 6 | | |
| Don't know | 7 | | |

d *Specify Title of Qualifications*

B5 What minimum level of qualification will you and your workers require in 5 years time?

Prompt from below if necessary

| Level | Code | No of Workers | Details |
|--------------------------------|------|---------------|---------|
| Masters or Higher Degree, PhD | 1 | | |
| Degree, NVQ Level 4 | 2 | | |
| A level, Diploma, NVQ Level 3 | 3 | | |
| GCSE 5 Grades A-C, NVQ Level 2 | 4 | | |
| GCSE Grades D-G, NVQ Level 1 | 5 | | |
| Other (please specify) | 6 | | |

e *Specify Title of Qualifications*

SECTION C: SKILLS GAPS

INTERVIEWER NOTE - ASK ALL

I would like you to break down your workforce (INCLUDING working owners) into specific categories.

ASK FOR EACH OCCUPATIONAL CATEGORY IN TURN:

C1. Are you employed as [OCCUPATION]?

C2. Are other working owners or staff in this business employed as [OCCUPATION]?

ADD IF NECCESARY: If staff or owners carry out more than one role please only include them in their *main* function.

Where a person has more than 1 role, identify the role that has the HIGHEST skill level. If the respondent is a Sole Trader then select Manager. It is expected that ALL businesses interviewed should identify at least 1 manager.

IF NO OCCUPATIONAL CATEGORIES SELECTED:

The categories I have mentioned are intended to cover all possible occupations. Please can you tell me which one comes closest to describing the owner(s) and employees within the business?

| Occupation name | C1 | C2 | C3 | C4 |
|---|----|----|----|----|
| MANAGERS (e.g. Farm Managers, managers in animal husbandry, forestry and fishing) | | | | |
| SKILLED TRADE OCCUPATIONS (E.g. Farmer, Horticulturalist, Landscape Gardener, Game Keeper, Tree Surgeon) | | | | |
| ELEMENTARY OCCUPATIONS (e.g. general farm workers such as Pickers and Packers, Nursery Worker, Fence Erector) | | | | |
| PROFESSIONAL OCCUPATIONS (e.g. Veterinarians, Advisor, Consultant) | | | | |
| ASSOCIATE PROFESSIONAL & TECHNICAL OCCUPATIONS (e.g. Supervisor, Team Leader) | | | | |
| ADMINISTRATIVE & SECRETARIAL OCCUPATIONS (e.g. Secretaries, Administrators) | | | | |
| PERSONAL SERVICE OCCUPATIONS (e.g. animal care services such as Veterinary) | | | | |

| | | | | |
|--|--|--|--|--|
| Nurse, Dog Warden, Zoo Keeper, Groom) | | | | |
| SALES & CUSTOMER SERVICE OCCUPATIONS (e.g. Sales and Retail Assistant) | | | | |
| PROCESS, PLANT & MACHINE OPERATIVES (e.g. Grader, Sorter, Fork lift/agricultural machinery drivers) | | | | |

C3. Within each occupational category previously identified please provide the exact number of staff employed at each occupational level?

Amongst your entire workforce, how many staff fall within the *[substitute with occupation name]* category?

C4. How many of your *[substitute with occupation name]* would you regard as able to do the job to the required level?

C5. And thinking about your workers who are not fully able to do the job to the required level, which skills, if any, do you feel need improving?

PROMPT IN ALL CASES, ROTATE ORDER, CODE TO GRID BELOW

| | |
|---|----|
| Technical and practical skills | 1 |
| Basic computing or Information Technology skills | 2 |
| Specialist computing skills associated with your business | 3 |
| Communication skills | 4 |
| Customer handling skills | 5 |
| Planning and organising | 6 |
| Team working skills | 7 |
| Foreign language skills | 8 |
| Problem solving skills | 9 |
| People management skills | 10 |
| Numeracy skills | 11 |
| Literacy skills | 12 |
| Marketing and sales | 13 |
| Accounts | 14 |
| Record keeping | 15 |
| Complying with employment legislation (<i>ask before other legislation</i>) | 16 |
| Complying with other legislation | 17 |
| Any other skills (WRITE IN) | 19 |

INTERVIEWER NOTE - IF TECHNICAL SKILLS ARE MENTIONED PLEASE RECORD THESE VERBATUM

SECTION D : SKILLS ISSUES

UPSKILLING

INTERVIEWER NOTE – ASK ALL

D1. Over the next five years, do you feel that there will be a greater need in the business for the following skills?

[READ OUT]

| | Yes | No | Don't know |
|---|-----|----|------------|
| Technical and practical skills | 1 | 2 | 3 |
| Basic computing or Information Technology skills | 1 | 2 | 3 |
| Specialist computing skills associated with your business | 1 | 2 | 3 |
| Communication skills | 1 | 2 | 3 |
| Customer handling skills | 1 | 2 | 3 |
| Planning and organising | 1 | 2 | 3 |
| Team working skills | 1 | 2 | 3 |
| Foreign language skills | 1 | 2 | 3 |
| Problem solving skills | 1 | 2 | 3 |
| People management skills | 1 | 2 | 3 |
| Numeracy skills | 1 | 2 | 3 |
| Literacy skills | 1 | 2 | 3 |
| Marketing and sales | 1 | 2 | 3 |
| Accounts | 1 | 2 | 3 |
| Record keeping | 1 | 2 | 3 |
| Complying with employment legislation (<i>ask before other legislation</i>) | 1 | 2 | 3 |
| Complying with other legislation | 1 | 2 | 3 |
| Any other skills (WRITE IN) | 1 | 2 | 3 |

WRITE IN - PLEASE RECORD THESE VERBATUM

RESKILLING

ASK FARM BUSINESSES

| | | | |
|--|-----|----|-----|
| D2. Do you or a family member currently working in the business plan to diversify or start up a new business in the next 5 years? | Yes | No | D/K |
| | 1 | 2 | 3 |

IF YES AT D2

| | |
|--|---|
| D3. What activities do you plan to start? | |
| DO NOT READ OUT – CODE ALL THAT ARE MENTIONED | |
| Letting of buildings for non-farming use | 1 |
| Processing of farm produce | 2 |
| Sale of farm produce e.g. farm shops | 3 |
| Sport and recreation | 4 |
| Tourist accommodation and/or catering | 5 |
| Light engineering | 6 |
| Agricultural contracting | 7 |
| Other (please specify) | 8 |

| | | | |
|---|-----|----|-----|
| D4. Will you or those who will be involved need to develop any skills for this (or these)? | Yes | No | D/K |
| | 1 | 2 | 3 |

IF YES AT D4

D5. Which skills do you or they need to develop?

[DO NOT READ OUT – CODE TO FRAME BELOW]

| | |
|---|-----|
| | Yes |
| Technical and practical skills | 1 |
| Basic computing or Information Technology skills | 2 |
| Specialist computing skills associated for business | 3 |
| Communication skills | 4 |
| Customer handling skills | 5 |
| Planning and organising | 6 |
| Team working skills | 7 |
| Foreign language skills | 8 |
| Problem solving skills | 9 |

| | |
|---|----|
| People Management skills | 10 |
| Numeracy skills | 11 |
| Literacy skills | 12 |
| Marketing and sales | 13 |
| Accounts | 14 |
| Record keeping | 15 |
| Complying with employment legislation (<i>ask before other legislation</i>) | 16 |
| Complying with other legislation | 17 |
| Any other skills (WRITE IN) | 18 |

| | | | |
|--|-----|----|-----|
| D6. Do you or a family member working on the farm plan to seek off-farm employment in the next 5 years? | Yes | No | D/K |
| | 1 | 2 | 3 |

IF YES AT D6

D7. What sector do you think this will be in?

PROMPT IF NECESSARY

| | |
|-------------------------------|---|
| Agri-food sector | 1 |
| Other sector (Please specify) | 2 |

SECTION E: TRAINING

INTERVIEWER NOTE – ASK ALL

E1. When was the last time someone in this business undertook training?

By training we mean any activities, on or off-the job, through which managers and workers improve their work related skills. It may occur |"one-off" or be over a longer period of time. It does not have to be linked to a qualification.

[code only one]

| | |
|---|---|
| Within the last 2 years | 1 |
| 2-5 years ago | 2 |
| 6-10 years ago | 3 |
| More than 10 years ago | 4 |
| No training is undertaken within the business | 5 |
| Don't know | 6 |

IF = 1, continue to E2

IF = 2-6, continue to E4

E2. Did the business pay for any of this training?

IF NECESSARY – e.g. Course fees, materials, exam fees

| | |
|-----|---|
| Yes | 1 |
| No | 2 |

E3. How much has your business spent on training in the last two years? (using the following range)

[code only one]

| | |
|---|----|
| Under £100 | 1 |
| £100-£249 | 2 |
| £250-£499 | 3 |
| £500-£999 | 4 |
| £1,000-£4,999 | 5 |
| £5,000-£9,999 | 6 |
| £10,000-£19,999 | 7 |
| £20,000-£29,999 | 8 |
| £30,000-£39,999 | 9 |
| £40,000-£49,999 | 10 |
| £50,000- £74,999 | 11 |
| £75,000-£99,999 | 12 |
| £100,000+ | 13 |
| Don't know | 14 |
| None, all training has been publicly funded | 15 |
| None, no money has been spent on training | 16 |

E4 Has any of the training been delivered through:

Read out, code all that apply:

| | Yes | No | D/K |
|---|-----|----|-----|
| Specialist land-based colleges (e.g. CAFRE) | 1 | 2 | 3 |
| Further Education colleges | 1 | 2 | 3 |
| Universities/Higher Education Institutes | 1 | 2 | 3 |
| Private providers | 1 | 2 | 3 |
| In-house training | 1 | 2 | 3 |

E5. Do you feel that any of the following are barriers limiting the amount of training undertaken in your business?

Read out, code all that apply:

| | Yes | No | D/K |
|---|-----|----|-----|
| All staff are fully proficient | 1 | 2 | 3 |
| Time is lost through training | 1 | 2 | 3 |
| The financial cost of training | 1 | 2 | 3 |
| No cover is available whilst staff / I am being trained | 1 | 2 | 3 |

| | | | |
|---|---|---|---|
| Lack of any subsidy for training | 1 | 2 | 3 |
| Lack of information about training opportunities | 1 | 2 | 3 |
| Can't find suitable training | 1 | 2 | 3 |
| Courses run at the wrong times/ formats (full-/part-time) | 1 | 2 | 3 |
| Training providers are located too far away | 1 | 2 | 3 |
| Poor quality of training | 1 | 2 | 3 |
| Lack of time to organise or conduct training | 1 | 2 | 3 |
| Length of time since left school | 1 | 2 | 3 |
| Test at the end of the training | 1 | 2 | 3 |
| Lack of time due to caring for dependants | 1 | 2 | 3 |
| High staff turnover | 1 | 2 | 3 |
| Other reason (take details) | 1 | 2 | 3 |

E6. Using the following scale, where 1 is "agree strongly", and 4 is "disagree strongly" do you agree with the following statements?

| The range of training available has improved in recent years | | | | |
|--|-------|----------|-------------------|-----|
| Agree strongly | Agree | Disagree | Disagree strongly | D/K |
| 1 | 2 | 3 | 4 | 5 |

If disagree or strongly disagree state the reason why

| |
|--|
| |
|--|

| The training that is available meets our business needs | | | | |
|---|-------|----------|-------------------|----|
| Agree strongly | Agree | Disagree | Disagree strongly | DK |
| 1 | 2 | 3 | 4 | 5 |

If disagree or strongly disagree state the reason why

| |
|--|
| |
|--|

| It is important that training leads to an accredited qualification | | | | |
|--|-------|----------|-------------------|----|
| Agree strongly | Agree | Disagree | Disagree strongly | DK |
| 1 | 2 | 3 | 4 | 5 |

If disagree or strongly disagree state the reason why

| |
|--|
| |
|--|

E7. Does the business hold or is it working towards the Investors in People award or any other quality standards?

[Read out, code only one]

| | |
|--|----------|
| | <u>✓</u> |
| Membership of a Quality Assurance Scheme <i>[take details]</i> | 1 |
| Working towards Membership of a Quality Assurance Scheme <i>[take details]</i> | 2 |
| Hold Investors in People award | 3 |
| Working towards Investors in People | 4 |
| Not working towards any of the above or similar standards | 5 |
| Don't know | 6 |

TAKE DETAILS - PLEASE RECORD THESE VERBATUM

| |
|--|
| |
|--|

E8. Does the business have...?

[Read out, code all that apply]

| | |
|---|---|
| | ✓ |
| A written business plan/farm development plan | 1 |
| A written training and development plan | 2 |
| Both a business plan and a training plan [do not read out code if yes at 1 and 2] | 3 |
| Neither [do not read out code if yes at 1 and 2] | 4 |
| Don't know | 5 |

SECTION F: RECRUITMENT

INTERVIEWER NOTE – ASK ALL

Thinking now about any job vacancies

F1. How many vacancies, if any, do you currently have in your business?

[probe for best estimate, write in figure]

| |
|--|
| |
|--|

IF NO VACANCIES, SKIP TO F5

F2. Are any of these vacancies proving hard to fill?

[code only one]

| | |
|------------|---|
| | ✓ |
| Yes | 1 |
| No | 2 |
| Don't know | 3 |

IF YES AT F2 ASK:

F3 Are there any specific jobs that you find recruiting difficult for?

F3A

| | |
|------------|---|
| Yes | 1 |
| No | 2 |
| Don't know | 3 |

If Yes at F3A ask F3B. If No skip to F5.

F3B Which jobs do you have difficulty recruiting for? [take details]

| |
|------------|
| F3B |
|------------|

IF YES AT F3A ASK:

F4. What are the main causes of having a hard-to-fill vacancy?

PROMPT FROM LIST

| | |
|--|----|
| Too much competition from other employers | 1 |
| Not enough people interested in doing this type of job | 2 |
| Difficult to recruit at the pay levels available | 3 |
| Low number of applications with the required skills | 4 |
| Low number of applications with the required motivation, attitude or personality | 5 |
| Low number of applicants generally | 6 |
| Lack of work experience the business demands | 7 |
| Lack of qualifications the business demands | 8 |
| Poor career progression/lack of prospects | 9 |
| Family members not interested in joining the business | 10 |
| Job entails shift work/unsociable hours | 11 |
| Seasonal work | 12 |
| Remote location/poor public transport | 13 |
| Other [take details] | 14 |
| No particular reason | 15 |
| Don't know | 16 |

F5 Have you recruited someone into the business as their first job after leaving [substitute group below]?

| | Yes | No |
|------------------------------|-----|----|
| a) University | 1 | 2 |
| b) Further Education College | 1 | 2 |
| c) School | 1 | 2 |

F6 If yes, how well prepared for work have the people you recruited from..(use group below).. been?

| | Very well prepared | Well prepared | Poorly prepared | Very poorly prepared | <i>Do not read – don't know/ varies too much</i> |
|------------------------------|--------------------|---------------|-----------------|----------------------|--|
| a) University | 1 | 2 | 3 | 4 | 5 |
| b) Further Education College | 1 | 2 | 3 | 4 | 5 |
| c) School | 1 | 2 | 3 | 4 | 5 |

F7a If poorly, or very poorly, why is that?

F7b If poorly, or very poorly, why is that?

F7c If poorly, or very poorly, why is that?

F8. In general terms how far would you agree or disagree that:

| | Agree strongly | Agree | Disagree | Disagree strongly | DK |
|---|----------------|-------|----------|-------------------|----|
| "The schools system supplies people with the skills they need to start working with us" | 1 | 2 | 3 | 4 | 5 |
| "The FE system supplies people with the skills they need to start working with us" | 1 | 2 | 3 | 4 | 5 |
| "CAFRE supplies people with the skills they need to start working with us" | 1 | 2 | 3 | 4 | 5 |
| "The University system supplies people with the skills they need to start working with us" | 1 | 2 | 3 | 4 | 5 |
| "Private training providers supply people with the skills they need to start working with us" | 1 | 2 | 3 | 4 | 5 |

If Disagree or strongly disagree please explain:

SECTION G: FINANCIAL ISSUES/ RECESSION IMPACT

We hope you will recognise it is important in showing the current health of your industry. We recognise that you may feel uneasy at disclosing financial information, but your individual responses will not be disclosed.

NON-FARM BUSINESSES**G1.**

IF THE ESTABLISHMENT IS A PRIVATE SECTOR BUSINESS

Are you able to indicate the turnover of the establishment in the last financial year?

PROMPT WITH RANGES IF NECESSARY

IF THE ESTABLISHMENT IS NOT A PRIVATE SECTOR BUSINESS

Are you able to indicate the budget of the establishment in the last financial year?

PROMPT WITH RANGES IF NECESSARY

[code only one]

| | |
|---------------------|---|
| G1 | ✓ |
| Under £10,000 | 1 |
| £10,000 – £49,999 | 2 |
| £50,000 – £99,999 | 3 |
| £100,000 – £249,999 | 4 |
| £250,000 – £499,999 | 5 |
| £500,000 – £999,999 | 6 |
| £1m – £1.9 m | 7 |
| £2m – £4.9m | 8 |
| £5m + | 9 |

| | |
|----------------------------------|----|
| In operation less than 12 months | 10 |
| Don't know | 11 |
| Refused | 12 |

ASK ALL

G2 What challenges do you anticipate your business will face over the next 12 months?

DO NOT PROMPT

| | |
|---|----|
| Economic conditions (e.g. producer prices, market conditions) | 1 |
| Increasing competition | 2 |
| Attracting appropriately skilled staff | 3 |
| Availability of finance | 4 |
| Complying with legislation | 5 |
| Labour costs | 6 |
| Cash flow | 7 |
| Geographic location | 8 |
| Seasonality of business | 9 |
| Keeping existing customers/business | 10 |
| No particular challenges | 11 |
| Other (please specify) | 12 |

Thank you for taking part in this survey. The information you provide will be treated with the strictest confidence.

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Appendix F Survey Analysis

This appendix includes the unweighted results of all questions directly from the survey. It provides the unweighted base sizes for each question and all verbatim comments.

It does not include cross-tabulations of data.

NB: Unweighted base refers to the actual number of businesses that responded.

Unweighted base: 991 businesses (Farm 634, non-farm 357)

SECTION A: BUSINESS DETAILS

QUESTIONS A1-A3 (FARM BUSINESSES ONLY)

A1. What are your main farm enterprises?

By “main” we mean what is the biggest enterprise by number or area

| | Frequency | Percent | Cumulative Percent |
|-----------------------|-----------|---------|--------------------|
| Cereals | 8 | 1.3 | 1.3 |
| Potatoes | 7 | 1.1 | 2.4 |
| Horticulture | 6 | .9 | 3.3 |
| Pigs | 6 | .9 | 4.3 |
| Poultry | 13 | 2.1 | 6.3 |
| Dairy | 94 | 14.8 | 21.1 |
| Beef cattle | 283 | 44.6 | 65.8 |
| Other cattle | 48 | 7.6 | 73.3 |
| Sheep | 115 | 18.1 | 91.5 |
| Mixed | 40 | 6.3 | 97.8 |
| Other, please specify | 14 | 2.2 | 100.0 |
| Total | 634 | 100.0 | |

Unweighted base: 634 businesses

A2. Is your business involved in any farm diversification activity?

| | Frequency | Percent | Cumulative Percent |
|------------|-----------|---------|--------------------|
| Yes | 47 | 7.4 | 7.4 |
| No | 583 | 92.0 | 99.4 |
| Don't Know | 4 | .6 | 100.0 |
| Total | 634 | 100.0 | |

Unweighted base: 634 businesses

A3. What activities are you involved in?

| | Responses | |
|--|-----------|---------|
| | N | Percent |
| Letting of buildings for non-farming use | 5 | 10.6% |
| Processing of farm produce | 5 | 10.6% |
| Sale of farm produce e.g. farm shops | 2 | 4.3% |
| Sport and recreation | 2 | 4.3% |
| Tourist accommodation and/or catering | 6 | 12.8% |
| Which Light engineering | 2 | 4.3% |
| Agricultural contracting | 7 | 14.9% |
| Other, please specify | 18 | 38.3% |
| Total | 47 | 100.0% |

Unweighted base: 47 businesses

A4-A6 (NON-FARM BUSINESSES)

A4. What exactly is done in this business? What is the main product or service? What exactly is made or done? What material or machinery does that involve using?

A conservation charity
A vets' practice
Agricultural consultants
Agricultural contracting. Slurry spreading. Fent tractor and high spec tanker
Agricultural contracting, silage etc
Agricultural contractor
Agricultural contractor p drainage and land shoring p 2 15 ton diggers, tractors
Agricultural contractors
Agricultural dealers, sales and repair
Agricultural engineering and spares.
Agricultural fencing
Agricultural landscaping /p/ gardening /p/ putting in patios or basic gardening
landscaping /p/ using general gardening tools /p/
Agricultural machinery
Agricultural machinery dealers
Agricultural machinery for leasing and hiring
Agricultural machinery repair
Agricultural merchants
Agricultural retail and haulage
Agricultural sales and surveys
Agricultural sales, machinery
Agricultural sales, services and parts
Agricultural show non-profit making to promote farming in local area
Agricultural supplies
Agricultural supplies /p/ selling fertilizer and hardware /p/ no real machinery or material
involved it's just selling on our own-grown fertilizer and wholesale hardware /p/ no
Agricultural. P fencing, gating etc

Agriculture machinery and tractor sales.
 Agriculture merchants. Sell seeds and fertilizer
 Animal feed
 Animal feed store
 Animal health and equipment retail outlet
 Antibiotics
 Any form of landscaping. Private landscaping and woodland creation. Service, fixing up gardens. Rotivators, tractors mini diggers, stone barriers and flail mowers.
 Arable farming
 Argi-sales and service
 Art design and construction p gardens p handheld machinery and diggers and anything done with gardens mainly
 Artificial insemination products
 Balloons
 Basic dog training
 Basically doing up lawns and hedges
 Beef cattle
 Beef cattle
 Beef cattle, sheep
 Beef machinery, tractor
 Blacksmith
 Board cats and dogs p when people are on holiday they look after animals p 2 partners own business
 Boarding animals when unwell...boarding kennels, power washer. Mild chemicals...medical equipments
 Boarding dogs and cats
 Boarding kennels
 Boarding kennels
 Boarding kennels
 Boarding kennels - hold dogs for example when owners are away on holidays
 Boarding kennels and cattery
 Boarding kennels and cattery
 Boarding kennels and grooming and farming
 Boarding kennels, pet shipping business
 Boarding kennels. mild chemicals..
 Boarding kennels...board dogs for people's holidays.
 Bring pets to the vets
 Brooders
 Buys and sell agricultural machinery
 Canine behaviour p jumps for agility, training leads and things like that
 Canine hydrotherapy, injured dogs
 Care for animals
 Catch native trait and salmon, white clawed crayfish and pearl mussels p provide surveys of rivers and enhancement plans for rivers p walk over surveys and the machinery they use are electro-fisher (Q filter?)
 Cattery

Cattery looking after cats
 Cattery services
 CCTV and rehabilitation. Cameras
 Chair covers
 Chair covers for weddings
 Charity - protection of woodland areas.
 Charity/environmental pressure group
 Charity in partnership looking at land management
 Chicken production
 Civil engineering p agricultural p mainly involved in drainage
 Collage, events e.g. horse shows
 Commercial and private landscaping
 Consists of two poultry houses for breeding chickens and there is also agricultural contractor work done also i.e. digger work p. Chickens are the main product along with the service provide through digger work p. Digger, tractor, dumper trailer are owned
 Construction and civil engineering
 Construction groundwork and large scale landscaping
 Consultant landscape architects
 Contractor, farming and digger work
 Country park
 Countryside consultancy, research and reports, research, none.
 Cremate animal carcasses p incinerator
 Cremating animals p incinerator
 Cutting hedges, stoning etc
 Dairy and slurry p tractors
 Dairy farm
 Dairy farmers
 Dairy farmers (p) milking about 100 hundred cows (p) sell bull calves (p) no
 Day-care and grooming of dogs
 Dairy cows, potatoes
 Dairy business
 Digger driver
 Digging work p
 Dog grooming
 Dog grooming
 Dog grooming
 Dog grooming
 Dog grooming
 Dog grooming
 Dog grooming
 Dog grooming
 Dog grooming and bathing
 Dog grooming.
 Dog grooming. Grooming. Clippers, scissors, shampoo.
 Dog grooming. Washing and clipping
 Dog kennels

Dog kennels
 Dog training services.
 Dog walking, behaviour, training classes
 Dog-grooming
 Domestic garden maintenance
 Engineering and haulage...lorries and guillotines and engineering machines.
 Environment agency p natural heritage
 Environmental consulting
 Environmental services, survey, cleaning sewers, jets, tankers, camera units probiotic
 units recycling unit pre-lining units, 40 vehicles.
 Equestrian centre – lessons and livery
 Equestrian riding school
 Evergreen lawns /p/ plough fields and maintain big landscapes and lawns /p/ use
 agricultural machinery and grass seeds /p/ no
 Facilitate animal care
 Farm
 Farm
 Farm and garden machinery
 Farm beef cattle
 Farm contracting, keeping animals etc. General farm tools
 Farm machinery and tractors.
 Farm machinery and trailers. Manufacturing and selling. Metal and wood mostly used.
 Farm supplier
 Farm surveys p farm advice
 Farm with 80 ponies which he looks after
 Farm, cattle, sheep, horses, riding school and shop
 Farm. Cows and sheep
 Farmer
 Farmer p.30 or so cows p.100 acres of good ground p.40acres of rough ground
 harvesters, ploughs and rotary's...
 Farmer of beef
 Farming
 Farming
 Farming
 Farming
 Farming
 Farming 20 suck cows
 Farming and fencing and contracting /p/ all farm fencing (metal, wood, plastic) /p/
 digger driving, tractor driving, and telescopic, all used for the farming
 Farming- mainly dairy
 Farming p agricultural contracting p tractors harvesters agricultural machinery
 Farming, contracting business, working farm
 Fencing
 Fencing - agricultural purposes mainly
 Fencing and hanging automating gates

Fencing and landscaping p more geared at fencing although sometimes the income is 50/50

Fencing p do a bit of sheep farming as well but the focus is mainly on the fencing now

Fencing, landscape gardening

Fencing, landscaping, diggers, post drivers, rotivaters

Fishery

Fishery

Florist

Florist

Florist

Florist

Florist

Florist

Florist

Florist

Florist

Florist

Florist

Florist

Florist

Florist

Florist

Florist (p) orders for events specific events (p) no

Florist and plant sales

Florist general florist

Florist p scissors

Florist retail

Florist shop

Florist, sell fresh flowers

Floristry

Floristry (p) completes orders for customers

Florists and venue decorators p decorating p backdrops and lights and flowers

Flower arrangements

Flower sales - weddings in particular

Flower shop

Flower shop

Flower shop cut flowers, indoor and outdoor, granite plaques. Done by hand

Flower shop - flowers

Flower shop p delivering flowers p scissors, row strippers

Flower shop.

Flowers

Flowers

Flowers, retail

Forestry contracting and Christmas tree growing p main product Christmas trees, woodland management, p machinery is tractors, wood chippers, chainsaws, sprayers, bush cutters

Freelance florist p scissors
 Garage and farm, repair machines, and manufacture
 Garden design
 Garden maintenance, decking, patios, home maintenance.
 Garden maintenance.
 Garden maintenance. Garden tools
 Gardening and landscaping
 Gardening business p landscaping p no
 Gardening business p. Tends/looks after customers' gardens p. Provides this service p
 uses machinery such as lawnmowers, shears, strimmers etc.
 Gardening services and landscaping. Tree op
 General agriculture repair and some manufacturing
 General farming – livestock and arable.
 Geological consultancy p. Topographic survey equipment
 Gift shop/ florist
 Grass cutting, hedge cutting and general maintenance p tidying gardens and cutting
 grass and weeding p lawn mowers and hedge cutters
 Green grocery and florist
 Groom dogs p hypo tables clippers dryers
 Ground work, grass cutting
 Groundwork, drainage, kerbing, brick paving
 Hatch day old chicks - incubators and hatchers
 Hazardous waste transfer site
 Heritage conservation
 Horse charity/shelter p. Care for 28 horses p. Tractor; quad; trailer; roller; fields are
 harrowed
 Horse riding school
 Horse riding school
 Horsing riding school
 Interior landscaping
 Involved in remedial works in foundation and floor slabs
 It's a leisure centre (p) horse riding, horse shows
 It's a recreation park.
 Just renting out the stables
 Keep sheep and cattle
 Kennels and dog handling
 Land surveys, land fill equipment, total ionisation detector, diggers
 Landscape
 Landscape
 Landscape
 Landscape architects - environmental impact - statements and appraisals
 Landscape architecture.
 Landscape gardener
 Landscape gardening. Mostly maintenance
 Landscaping
 Landscaping

Landscaping
 Landscaping
 Landscaping
 Landscaping e.g. Patios and fencing.
 Landscaping gardens
 Landscaping gardens etc. Mowers
 Landscaping p landscape gardens
 Landscaping p. Gardening p. General labour
 Landscaping.
 Landscaping.
 Lawn specialists and horticulture
 Logs firelighters
 Machine hire for maintenance projects.
 Machinery fixing up
 Machinery sales
 Maintenance of farms and work to new developments
 Make flower arrangements
 Management consultancy firm
 Manufacture housing for housing industry
 Manufacture potato machines
 Market garden
 Mechanic p small repairs to cars
 Mechanical engineers, livestock equipment
 Milking cows p milk is the main product p milking parlour is the main equipment
 Mix cattle feed, sales in fertilizer, grass seed and silage wrap. Farm beef on 120 acres.
 Wee bit of contracting, silage spraying, reseeding
 Nursery, plant growing and landscape contracting. (p) 2x compact tractors, 1x 1.5
 tonne digger, 1x 80 horse-power tractor, 1x land leveller and rotavator, 2x ride on
 mower, 3x walk behind mower, 1x mini dumper, 1x hand rotavator
 Open farm
 Own a floristry shop and teach floristry part-time
 Pet care p looking after dogs and cats
 Pet crematorium
 Pet memorial.
 Pet sitting service
 Poultry
 Poultry production, for supply to moy park
 Poultry. Poultry products. Farm machines
 Private forestry...tree establishment and maintenance
 Produce bread, breakfast cereal, animal feed and straw for other famers and
 customers (p) no
 Product supplier for farms i.e. lime fertiliser etc
 Property
 Provide farm supplies p fences etc
 Provide flowers p florist
 Provide sundry for farmers

Race horses

Rents out JCB digger as main service p. Secondary business is a small farm 50 acres p. They also rent out other land p. Beef cattle and sheep are the main farming enterprise

Repair tractors, repair, heavy machinery

Repairing garden machinery. Chainsaws, lawnmowers. Spare parts, hydraulic hoses. No machinery used.

Retail

Retail animal feed garden and farm products

Retail sales p trailers p livestock p livestock equipment

Retail seasonal shop p garden furniture etc, Christmas trees

Riding and trekking ponies

Riding school

Riding school...also own cattle

Rural retailing p retailing to farms p animal health products p fencing p weed killers

Sales and mechanising p sell tractors and machinery p repair machines p basic garage equipment used.

Sell agricultural machinery

Sell and service horticulture equip

Sell animal grooming products

Sell feed, fertiliser etc to farmers

Sell flowers (p) does order for people for weddings etc (p)

Sell new tractors, trailers and wrappers

Sell spare agricultural parts p spare parts p tractors and other agricultural machinery

Sell tractors, machinery, seeds - general merchants

Sells agricultural machinery and spare parts

Sheep and cows p farming p keep sheep for meat and cows to produce calves to sell p tractor and land rover quad bike

Similar to vet work

Soft and hard landscaping

Sports grounds contractors

Stables, livery

Stores tractor repairs p tractors

Suckler cows take beef off the stores

Supply fencing and fencing parts to farms p fencing wire, posts etc

Teach riding, equine assisted learning,

The business mainly wholesales to garden centres, farm shops, hardware stores

They breed and hatch chickens.

Timber merchant

Topsoil retail

Tractor machinery supply

Tractor sales

Trading farm machinery and providing a service & repair for farm machinery

Training support organisation, provide training courses for women

Tree services

Tree surgery

Tree surgery
 Tree surgery
 Tree surgery
 Tree surgery and ground maintenance
 Tree surgery and maintenance p using chainsaws
 Tree surgery p planting trees
 Trees & forestry
 Vet
 Vet
 Vet - attends more small animals
 Vet practice
 Vet surgery
 Veterinary
 Veterinary clinic
 Veterinary clinic
 Veterinary clinic
 Veterinary clinic
 Veterinary clinic
 Veterinary clinic
 Veterinary clinic
 Veterinary clinic p x ray machine anaesthetic machine, endoscope telephone and computers
 Veterinary hospital p to care and look after animals
 Veterinary practice
 Veterinary practice
 Veterinary practice
 Veterinary practice
 Veterinary practice
 Veterinary practice
 Veterinary practice
 Veterinary services
 Veterinary surgeon
 Veterinary surgery
 Veterinary surgery, veterinary surgical equipment
 Veterinary surgery, surgical equipment
 Vets
 Waste consultant-advising councils and private operators.
 Water conservation
 Water hygiene
 We are a forest management company , we carry out forestry operations /p/ we use chainsaws, brush cutters, chemical napsack sprayers, timber harvesters and forwarders /p/ we have plant machinery too, diggers etc nb. all "workers" in this company all hold shares' in the company, therefore there are over 50 working owners, and the man did not know how man fell into each age group, only which age groups there were no working owners in
 We hire out linen for weddings

We manufacture fuel from waste materials
 We sell new and second hand tractors and do repairs as well
 Wedding decorators
 Wedding flowers
 Well as the name would suggest, we are a fisheries consultancy service, an
 environmental consultancy service, specialising in fisheries
 Wholesale distributor of agrochemicals
 Wholesalers and retailers in poultry
 Wholesalers of agricultural equipment
 Wooden gates
 Working with beef and sheep
 Working with ppl in the aquaculture business

A5. Which of these industries would you say the business mainly fits into?

| | Frequency | Percent | Cumulative Percent |
|--|-----------|---------|-----------------------|
| Aquaculture | 11 | 3.3 | 3.3 |
| Animal Care | 73 | 21.9 | 25.1 |
| Equine | 13 | 3.9 | 29.0 |
| Fencing | 11 | 3.3 | 32.3 |
| Farriery | 1 | .3 | 32.6 |
| Floristry | 47 | 14.1 | 46.7 |
| Fisheries Management | 2 | .6 | 47.3 |
| Game & Wildlife | 7 | 2.1 | 49.4 |
| Land-based Engineering | 47 | 14.1 | 63.5 |
| Landscaping\Amenity Horticulture | 52 | 15.6 | 79.0 |
| Environmental Conservation | 20 | 6.0 | 85.0 |
| Production Horticulture | 10 | 3.0 | 88.0 |
| Trees & Timber | 13 | 3.9 | 91.9 |
| Veterinary Nursing and Ancillary Activities | 27 | 8.1 | 100.0 |
| Total | 334 | 100.0 | |

Unweighted base: 334 businesses

A6. Would you classify this establishment as...

| | Frequency | Percent | Cumulative Percent |
|---------------------------------|-----------|---------|-----------------------|
| A private sector business | 309 | 86.6 | 86.6 |
| A public sector business | 34 | 9.5 | 96.1 |
| A voluntary sector organisation | 8 | 2.2 | 98.3 |
| Other, please specify | 4 | 1.1 | 99.4 |
| Don't know | 2 | .6 | 100.0 |
| Total | 357 | 100.0 | |

Unweighted base: 357 businesses

QUESTIONS A7-A9 (ALL BUSINESSES)

A7. Is the business...

| | Frequency | Percent | Cumulative Percent |
|-----------------------|-----------|---------|--------------------|
| Under sole ownership | 721 | 72.8 | 72.8 |
| A partnership | 212 | 21.4 | 94.1 |
| A limited company | 52 | 5.2 | 99.4 |
| Other, please specify | 5 | .5 | 99.9 |
| Don't know | 1 | .1 | 100.0 |
| Total | 991 | 100.0 | |

Unweighted base: 991 businesses

A8. How many working owners are there in this business?

| | Frequency | Percent | Cumulative Percent |
|-------|-----------|---------|--------------------|
| 0 | 24 | 2.4 | 2.4 |
| 1 | 675 | 68.1 | 70.5 |
| 2 | 231 | 23.3 | 93.8 |
| 3 | 49 | 4.9 | 98.8 |
| 4 | 5 | .5 | 99.3 |
| 5 | 1 | .1 | 99.4 |
| 6 | 2 | .2 | 99.6 |
| 7 | 1 | .1 | 99.7 |
| 8 | 1 | .1 | 99.8 |
| 25 | 1 | .1 | 99.9 |
| 30 | 1 | .1 | 100.0 |
| Total | 991 | 100.0 | |

Unweighted base: 991 businesses

A9. How many working owners are in each of these age groups?

| | Total working owners | Unweighted base |
|---------|----------------------|-----------------|
| 16 - 19 | 2 | 2 |
| 20 - 24 | 45 | 39 |
| 25 - 34 | 136 | 108 |
| 35 - 44 | 288 | 227 |
| 45 - 54 | 359 | 294 |
| 55 - 64 | 295 | 249 |
| 65 + | 262 | 234 |
| Total | 1387 | 967 |

A10. workforce

Whether business employs any staff? (excludes working owners)

| | Frequency | Percent | Cumulative Percent |
|-------|-----------|---------|--------------------|
| No | 521 | 52.6 | 52.6 |
| Yes | 470 | 47.4 | 100.0 |
| Total | 991 | 100.0 | |

Unweighted base: 991 businesses

Whether employ full-time staff

| | Frequency | Percent | Cumulative Percent |
|-------|-----------|---------|--------------------|
| No | 235 | 50.0 | 50.0 |
| Yes | 235 | 50.0 | 100.0 |
| Total | 470 | 100.0 | |

Unweighted base: 470 businesses

Whether employ part-time staff

| | Frequency | Percent | Cumulative Percent |
|-------|-----------|---------|--------------------|
| No | 180 | 38.3 | 38.3 |
| Yes | 290 | 61.7 | 100.0 |
| Total | 470 | 100.0 | |

Unweighted base: 470 businesses

Whether employ seasonal staff

| | Frequency | Percent | Cumulative Percent |
|-------|-----------|---------|--------------------|
| No | 398 | 84.7 | 84.7 |
| Yes | 72 | 15.3 | 100.0 |
| Total | 470 | 100.0 | |

Unweighted base: 470 businesses

| | Sum |
|---|------|
| How many full-time, part-time or seasonal staff, excluding working owners, in total, do you currently have on your wage bill, this can also include family members? | 1858 |
| How many of your employees work full-time? | 1123 |
| How many of your employees work part-time? | 564 |
| How many of your workforce are employed on a seasonal basis? | 170 |
| How many of your workforce are male? | 1171 |
| How many of your workforce are female? | 678 |

Unweighted base: 470 businesses

A11. How many workers excluding working owners do you employ in each of the following age categories?

| | Total number of workforce (excluding working owners) | <i>Unweighted base</i> |
|---------|--|------------------------|
| 16 - 19 | 116 | 78 |
| 20 - 24 | 248 | 150 |
| 25 - 34 | 447 | 178 |
| 35 - 44 | 386 | 176 |
| 45 - 54 | 212 | 115 |
| 55 - 64 | 93 | 56 |
| 65 + | 33 | 32 |
| Total | 1535 | 470 |

A12. Over the last twelve months how many migrant workers did you employ?

| Group | Total Number |
|-----------|--------------|
| Full-time | 47 |
| Part-time | 15 |
| Seasonal | 5 |

Unweighted base: 23 businesses

A13. Which countries do your migrant workers come from?

| Country | n |
|-------------|----|
| Poland | 15 |
| Lithuania | 3 |
| Slovakia | 2 |
| Germany | 1 |
| Latvia | 1 |
| Ireland | 1 |
| Australia | 1 |
| New Zealand | 1 |
| Hungary | 1 |
| Portugal | 1 |
| Bulgaria | 1 |
| Romania | 1 |
| East Timor | 1 |
| Don't know | 1 |

Unweighted Base: 23 businesses

SECTION B: QUALIFICATIONS

Do you hold any qualifications?

| | Frequency | Percent | Cumulative Percent |
|------------|-----------|---------|--------------------|
| Yes | 460 | 46.4 | 46.4 |
| No | 523 | 52.8 | 99.2 |
| Don t know | 8 | .8 | 100.0 |
| Total | 991 | 100.0 | |

Unweighted base: 991 businesses

B2. What is the highest level of qualification you hold?

| | Frequency | Percent | Cumulative Percent |
|--------------------------------|-----------|---------|--------------------|
| Masters or Higher Degree, PhD | 45 | 4.5 | 4.5 |
| Degree, NVQ Level 4 | 106 | 10.7 | 15.2 |
| A level, Diploma, NVQ Level 3 | 129 | 13.0 | 28.3 |
| GCSE 5 Grades A-C, NVQ Level 2 | 70 | 7.1 | 35.3 |
| GCSE Grades D-G, NVQ Level 1 | 19 | 1.9 | 37.2 |
| Other, please specify | 76 | 7.7 | 44.9 |
| Refused | 15 | 1.5 | 46.4 |
| None mentioned | 531 | 53.6 | 100.0 |
| Total | 991 | 100.0 | |

Unweighted base: 991 businesses

B3. Do any of the other working owners hold any qualifications? (Question for farm businesses only, with more than 1 working owner)

| | Frequency | Percent | Cumulative Percent |
|------------|-----------|---------|--------------------|
| Yes | 64 | 36.6 | 36.6 |
| No | 105 | 60.0 | 96.6 |
| Don t know | 6 | 3.4 | 100.0 |
| Total | 175 | 100.0 | |

Unweighted base: 175 businesses

If yes, please provide details of the highest level of qualification held: Masters or Higher Degree, PhD

| | Frequency | Percent | Cumulative Percent |
|---------------|-----------|---------|--------------------|
| Not mentioned | 62 | 96.9 | 96.9 |
| Mentioned | 2 | 3.1 | 100.0 |
| Total | 64 | 100.0 | |

Unweighted base: 64 businesses

Degree, NVQ Level 4

| | Frequency | Percent | Cumulative Percent |
|---------------|-----------|---------|--------------------|
| Not mentioned | 46 | 71.9 | 71.9 |
| Mentioned | 18 | 28.1 | 100.0 |
| Total | 64 | 100.0 | |

Unweighted base: 64 businesses

A level, Diploma, NVQ Level 3

| | Frequency | Percent | Cumulative Percent |
|---------------|-----------|---------|--------------------|
| Not mentioned | 47 | 73.4 | 73.4 |
| Mentioned | 17 | 26.6 | 100.0 |
| Total | 64 | 100.0 | |

Unweighted base: 64 businesses

GCSE 5 Grades A-C, NVQ Level 2

| | Frequency | Percent | Cumulative Percent |
|---------------|-----------|---------|--------------------|
| Not mentioned | 46 | 71.9 | 71.9 |
| Mentioned | 18 | 28.1 | 100.0 |
| Total | 64 | 100.0 | |

Unweighted base: 64 businesses

GCSE Grades D-G, NVQ Level 1

| | Frequency | Percent | Cumulative Percent |
|---------------|-----------|---------|--------------------|
| Not mentioned | 60 | 93.8 | 93.8 |
| Mentioned | 4 | 6.3 | 100.0 |
| Total | 64 | 100.0 | |

Unweighted base: 64 businesses

Other

| | Frequency | Percent | Cumulative Percent |
|---------------|-----------|---------|--------------------|
| Not mentioned | 53 | 82.8 | 82.8 |
| Mentioned | 11 | 17.2 | 100.0 |
| Total | 64 | 100.0 | |

Unweighted base: 64 businesses

B4 What are your workers current qualifications?
(Asked to all businesses)

| | N | Percent | Percent of Cases (multiple Response) | Number of workers |
|--------------------------------|-----|---------|--------------------------------------|-------------------|
| Masters or Higher Degree, PhD | 16 | 3.0% | 3.4% | 41 |
| Degree, NVQ Level 4 | 69 | 13.0% | 14.7% | 188 |
| A level, Diploma, NVQ Level 3 | 78 | 14.7% | 16.6% | 185 |
| GCSE 5 Grades A-C, NVQ Level 2 | 87 | 16.4% | 18.5% | 236 |
| GCSE Grades D-G, NVQ Level 1 | 13 | 2.4% | 2.8% | 27 |
| Other, please specify | 30 | 5.6% | 6.4% | 66 |
| No Qualifications | 148 | 27.9% | 31.5% | - |
| Don't know | 90 | 16.9% | 19.1% | - |
| Total | 531 | 100.0% | 113.0% | |

Unweighted base: 470 businesses

FARMERS verbatim comments (QB4)

B4c1.

PHD in engineering

B4c2.

Agriculture (p) no

Agriculture

Bachelor of agriculture

Degree in accountancy

Degree in agriculture

Degree in agriculture

Degree in electrical engineering

Don't know specific individuals but broadly some would have these qualifications

Engineering

Foundation degree in health and safety at omagh technical college over a period of 4 years

Mechanical engineer (p) worked on the farm when he finished university until he got a job related to the degree (p) now only works on the farm part time

Mechanical engineering

My son has a degree in farming

No

On a gap year from university

One degree in maths and one in business economics

One of my employees did a part time course at queens

Qualified doctor

School teacher, works part time on farm

Son has an agricultural degree, greenmount

Teaching degree
University degree in finance
Went to Enniskillen fe for 3 years

B4c3.

Royal School of London, Diploma in Food Management and Hygiene
A - levels, but she's studying Health course at college in Coleraine
A levels doing a course in management at moment
Achieved a-levels at school and going on to pharmacy at university
Actuarial student
All finished A levels, not sure of the exact subjects or grades.
Btech in business management and equine studies
Daughter qualified as engineer, wife's is trained in accounting
Diploma in mechanics
Don't know
Don't know specific individuals but broadly some would have these qualifications
Don't know
Greenmount (p) diploma
Has completed A levels in school
He has a-levels but I don't know details
He is a Greenmount lad
Loughery Cookstown agricultural college
Loughery College
My son went to Greenmount agricultural college
No
No
No
No
No
No idea - general farming course (She thinks)
None
Nope p no
Not really no
Not sure of details
One works with bt as an apprentice
Plasterer
Plasterer
Studied at Greenbank for 3 years
Went on to university but never finished

B4c4.

A number of them have GCSE
2
2 sons that work on farm completed GCSE's at school before leaving
Achieved GCSE's at school p. Unaware of specific grades
Both have GCSES - not sure of details

Dg

Don't know specific individuals but broadly some would have these qualifications

Don't know

Don't know

Don't know

Ej

GCSEs

GCSEs from school,

Greenmount I think

He has GCSEs but I don't know details

I have a fella who comes into do the bailing for the silage, but I don't know about his qualifications. The son has his GCSE's but he works for ALMAC, the traveller's community crowd.

Just GCSEs, no NVQs or anything like that

Left at GCSE, no formal education since

Licensed drivers

Mainly Bs and Cs

My one employee

N/A

Na

No

No

No

No

No

No p nothing

No, probed 3 times and then said on the third attempt vague idea of English, math, art

p

None

Not sure of specific details

Not too sure of any details

One worker has GCSEs and one has O levels

Only have one worker (P) no

Son has gcse grades

Son helps him out with part-time work on farm as still at school but has GCSE qualifications

Son is still at school

Still at school but they help me out

The girl at college has GCSE's before her A-levels, and my son has GCSEs and is currently studying A-levels

Thinks maths English etc

B4c5.

Some have these qual

Completed GCSE but didn't get good results

Didn't do to well in GCSE so he left school and went to a technical college

Don't know specific individuals but broadly some would have these qualifications
Left school before GCSE
No
Not sure about their qualifications

B4c6.

Two students will have hands soon
Apprenticeship at FE college and now working as an electrician
Did it with company he is working with
Driver
Ef
Further Education College
His son is in his 3rd year of joinery apprenticeship
No
No
She is at university studying to be a vet
Sole owner has primary school level p wasn't really any other education when I was at school p people just had to go out and get jobs
Works part time on the farm, the rest of the time he is working a bricklayer

NON-FARMS verbatim comments (QB4)

B4c1.

Degree in planning and architecture
All have degree
Degree 3 girls in office have degrees
Degree in veterinary
Degrees - the vets
Four veterinary degrees
GCSEs
Landscape architecture.
Masters in chemistry and other in accountancy
NBA in environmentally economics, PHD environmental economics.
No
Nope
Not really
Some of the staff are master technicians
Vet degree and higher diploma in radiography
Veterinary nursing

B4c2.

No
7 have landscape degree and 1 business degree
A degree in veterinary
A qualification in commercial floristry
Ai British horse society and equine business-2

All do in environmental related area
 Biological sciences
 Biology degree
 Course in mechanics at college of FE, thinks it is a NVQ level
 Degree in business p two staff
 Degrees in forestry
 Degrees, mixture of degrees e.g. Business and history.
 Fully qualified staff for example vets etc
 Geography degree p at Leeds university
 He got the level 4 in colleges at Loughry then Lisburn
 HND in engineering
 Landscape architecture.
 Me and my colleague both received a florist degree at Greenmount
 Most of them have either a business degree or vet degree
 No
 No
 No
 No
 No
 No.
 None
 Not to sure
 Nursing degree
 NVQ Btec level 3
 One worker has a degree in zoology (p) nothing to do with business but is working here
 as he can't get a job related to his course
 Politics and I'm unsure about the other - I know she went to qub
 Qualified in the field of agriculture, Greenmount.
 Trainees reg veterinary nurse
 Training to be a veterinary nurse
 University
 Unsure
 Veterinary surgeons
 Veterinary
 Veterinary and nursing degrees
 Veterinary nurse...degree standard
 Veterinary nursing
 Veterinary nurse and teaching
 Veterinary nursing degree
 Veterinary degree
 Veterinary degrees and nursing degree
 Vets
 Went to Greenmount college

B4c3.

...

Alevels

All 4 employees have A levels

Animal care NVQ

Are some nurses and other people that are trained to specific tasks

BTEC National Certificate in floristry

City and guilds qualification

Construction

Degree in Politics and sociology

Don't know

Don't know exactly

Farmers. Agriculture certificate

First aid diplomas.

Fully qualified mechanics. Also one in training at the minute

GCSEs and qualifed electrian

General labourers. Not particularly worried about level of education.

Grades a - b

Has her A-levels and is studying maths at university

He is not sure of the actual subjects

HND in horticulture from Greenmount

IT and contract admin.

No

No

No

No

No

No

No

No

NO

NO

No

No

No

No

No

No

No (probed three times)

None

Not sure.

Nvq in agriculture

One of the employees received qualifications up to AS level

Specialist machinist

Veterinary nurse

Veterinary nursing

B4c4.

All have GCSEs

...

6 o-levels.

9 GCSEs

All have the qualification for the skill work

Both did GCSEs

Clerical staff

Currently working towards their veterinary nursing degree therefore only gcse's at this stage

Don't know

Don't know exactly

Got a HND in spraying at Greenmount agricultural college

He doesn't know the GCSE subjects

Just the one worker that seasonal p just on occasions that we need a hand

No

No

No

No

No

No

No

No

No

No

No

No

No

No

No

No

No

No

No

No

No idea.

No p couldn't say exactly what they have

No to sure

No.

Normal o level equivalent

Not really

NVQ - animal management, private training.

Out of all the 6 employees the minimum qualification held is gcse.

Qualified welder

Still in school, gcse achieved

Up to GCSE

Up to O-level

Usually employs school boys looking for work during the summer

B4c5.

Don't know exactly

Left school after they had completed GCSE, no formal education undertaken since

No

No

No

No

The admin workers and one of the part time drivers has GCSEs in those grades in maths and English amongst others

B4c6.

A third level diploma for floristry

BHS approved - Irish horse society. Teaching people to ride horses

Driving lorry

Floristry and design

It is a specialised skill/ qualification

Lorry driver

Need to use their initiative

No

No

No

No

No

One has it and the other is studying for it

One of them has (p) one has only started (p) no

Qualification at tech 2 yr apprenticeship

Stage 3 qualification

Students from the tech p. Who come out a couple of days a week for experience

They may have some others, I'm not sure /p/ that'll do

B5 What minimum level of qualification will you and your workers require in 5 years time?

| | N | Percent | Percent of Cases (multiple Response) | Total number of workers needing minimum qualification |
|--------------------------------|-----|---------|--------------------------------------|---|
| Masters or Higher Degree, PhD | 7 | .7% | .7% | 13 |
| Degree, NVQ Level 4 | 35 | 3.4% | 3.5% | 77 |
| A level, Diploma, NVQ Level 3 | 61 | 6.0% | 6.2% | 56 |
| GCSE 5 Grades A-C, NVQ Level 2 | 102 | 10.0% | 10.3% | 208 |

| | | | | |
|------------------------------|------|--------|--------|----|
| GCSE Grades D-G, NVQ Level 1 | 28 | 2.8% | 2.8% | 25 |
| Other, please specify | 129 | 12.7% | 13.0% | 62 |
| Don't know | 653 | 64.3% | 65.9% | - |
| Total | 1015 | 100.0% | 102.4% | |

Unweighted base: 991 businesses

FARMERS verbatim comments (QB5)

B5c1.

Veterinary degree

Would not be doing it

B5c2.

Don't know (p) no

I don't have any staff

No

No

No workers

Not relevant maybe if diver

B5c3.

0

-

All part time workers in the ponies, just friendly people

As opposed to the person who is doing the bookwork (p) no

Don't have any employees

Don't have any workers

Don't have any workers (p) no

Don't have any workers (P) no

Don't know

Don't need anyone to take courses or anything like that as I think I will be retiring soon

Everyone is going to need training over the next few years

Further on Greenmount

He would need to update his qualifications

Help them along with paperwork and machines

I am going to do a course next year on poultry NVQ not sure of a level though (p) no

I don't have any workers

I don't have any workers

I think people will need them!

No

No

NO

No

No none

No p nothing

No qualifications required.

Not going to be needing any training at my age
 Not sure yet, the goal posts keep changing, I own a butcher's shop as well so it further training would be in relation to that
 One son helps sometimes
 People in the future will need to know how to manage a farm so they'll need more qualifications to do that
 That many changes in the business aspect that you have to deal with and dealing with legislations that change is hard to keep it up with p no
 Workers need to be better educated in husbandry, educated people don't know much about cattle.
 You wouldn't need any

B5c4.

A basic level and knowledge of both maths and English is essential I feel.
 Agricultural college
 All workers will probably require this
 Anyone that we employ will probably need that level of qualification
 Basic interest in farming would be the most crucial elements.
 Basic knowledge is always a help e.g. Maths and English.
 Don't have any
 Don't have any workers (p) no
 Don't know
 Don't know
 Don't know
 Don't know
 Don't know
 Don't know specific individuals but broadly some would have these qualifications
 English and math
 Everybody will need that p well maybe some people will need the qualification, but older people like myself will not require or want to do things like that
 Fairley competent to perform task with the level of qualification
 Family business, don't require any staff.
 Haven't decided.
 I can't tell you 5 years ahead, things change day to day. Farming has changed a lot of the last 40 years. Paperwork is the main issue, it's very time consuming /p/ no
 I feel they will need these to
 I think everyone will need 5 GCSE's including English Language and Maths
 I would need to get them if I was still working and they were required
 I would need to update my qualifications if it came to it
 If son takes over he will need a basic knowledge of what is going on
 I'll be retired but they will need to update
 Its just me working on the farm
 Just my one farm hand
 Just went to school to GCSE level
 Lots of paper work involved so skills are maths is needed
 Me, well I wouldn't need any to be honest

More computer skills

No

No

No

No

No

No

No more

No one else works here so we won't need updates

No p don't know

No were all up to date

No workers at present

None at all needed

None.

Not sure

Nothing really needed (p) it's just preferred but not important

One son helps sometimes

Relate it more to agricultural businesses so as required skills are met.

Simple sums etc would be essential to do.

Skills they have don't relate to their particular type of work.

So much paper work.

B5c5.

Don't have any

Don't think a minimum level of qualification is that necessary p a person from a farming background is more likely to be of more worth to the farm than someone with a non-farming background and a qualification p no

I don't have any workers, I've never hired anyone, its just me

I would be asking them if they are good at their job not if they are qualified on paper

Left school at this stage and has not undertaken any form of formal education since

No

No

No

No

No

No

No

No.

Not sure

Not sure

Train himself

Wont be employing any more workers

B5c6.

0

0
0
0
0
0
0
0
0
0
0
0
0

A certain level of education would be needed for farming to cope with records etc.

Contact feels he won't need it but others might

Contact is undertaking organic and book keeping courses for DARD at the moment

Doesn't feel that any qualifications will be required.

Don't have any current qualifications...

Don't have employees

Don't need any more

Don't need qualifications for farm work such as tractor driving etc

Don't need them

Don't need to them to have a qualification

Every will need IT skills in a few years

Farming today is non viable as a family business, long hrs and no pay

Has no workers

HAS THE TRAINING NEEDED

Have no other staff

I don't have any employees

I don't have any workers

I don't think it's necessary to the farming industry. I don't have any qualifications, not even a GCSE, and I think I'm well capable of running the farm

I don't think its relevant for farmers to have qualification its more about hands on experience

I'll be retired!

Its more about experience than having a qualification

Just common sense

Just himself don't need any qualifications

Just myself working the farm I have never had or will have any other employees

Myself and my son would need to get it!

No

No

No

No

No

No

No

No

No
 No
 NO
 No
 No
 No
 No
 No
 No employees
 No employees
 No employees
 No employees
 No need for it paper is no good to you its the way you do ti
 No p nothing I can think of
 No (probed three times)
 No, I don't want to go on about it
 No.
 No.
 No.
 No.
 No – farmers learn by doing – experience is worth more than any qualification
 None
 None
 NONE
 None
 None
 None
 None
 None
 None
 Not really (P) no nothing
 Only have one and he wont need any
 Practical trained don't need to worry
 Related to work within that environment.
 Retiring
 Seasonal don't need to worry
 Small farm, work is very practical, nothing really technically
 They won't need any
 Think computers are becoming important in the business and would need skills in that
 Think everyone who works on a farm needs hands on experience
 To work on a farm you need experience and I my workers would just need that!
 We know nothing about them at all /p/ I don't think we'll need them, not at this stage of
 our life, and not for the amount of farming we do /p/we don't do any farming at all in the
 winter months, just buy in and graze the cattle in the spring then sell them off after
 Well you learn a lot growing up on a farm
 Won't have any workers and he is qualified enough

NON FARMS verbatim comments (QB5)

B5c1. Can you provide any further details on this? PROBE FULLY AND RECORD VERBATIM

Canine behaviour and training p Bishop Burton Berberloy is the place he did it
L
MSc in engineering
Needs a course that would be construction related
No.
Veterinary nurse

B5c2. Can you provide any further details on this? PROBE FULLY AND RECORD VERBATIM

Biology degree
Business marketing
Degrees needed at vet level
I think the standard will improve up to university level
I would need to update it that was the case
Just basic dog grooming
Land use and environmental management at Queens
Most people in the practice all have degrees or HNDs and are overly qualified for their job, therefore they will need this level of qualification in the future in order to do their job.
No
No
No
No
No
No
No
No
No
No reason
None
None
Not as yet.
Not at this time.
Not to sure
Nvq, just to keep up standards
Same as before - vets need degrees to practise
They don't need to have the veterinary degree, only I do. But I'm sure if they had a qualification in veterinary nursing that would be of help
Vet
Vet

We have no current workers, most are only employed on a temporary basis, but not all of them will need a degree
Would like these to work towards their British horse society degree

B5c3. Can you provide any further details on this? PROBE FULLY AND RECORD VERBATIM

All trained
Doesn't expect to have staff
Dog behaviour higher level,
Done at CAFRE
Don't need them
Electrician
F

Important to get the diploma because it enhances knowledge of trade
Just remain the same. Won't be looking any more qualification. Just experience. Just looking for someone who he can work all day with and someone you can work with without being annoying etc.

Need qualifications on tractor mechanising

No

No

No

No

No

No

No

No

No

No

No

No

None

Not really they need someone with more technology information

Nvq in poultry rearing

Shop workers

They all have degrees.

We would need more computer skills because a lot of our business comes through our website

Will need a level

B5c4. Can you provide any further details on this? PROBE FULLY AND RECORD VERBATIM

Accounts and forms ie general admin course

All good education p literacy p numeracy

Computing, maths and English. The basics should be understood.

Don't need any further qualification to work on a farm. Most of the workers are farmers sons who come straight from school to work on this farm.

GCSE english and maths would be needed

GCSEs going on to do their vet nursing degree

IT and admin.

Just think you need some sort of qualification but not a degree or anything /p/ the qualification is just something to prove that you have the capacity to take on information to improve relevant skills /p/ no

Just to meet standards

Kennel course

Minimum of grade c gcse for maths and English

N/a

NA.

Need GCSE to get job

No

No

No

No

No

NO

No

No

No

No

No

No

No

NO

No

No

No

No

No (p) no

No (probed three times)

No real qualifications needed

No.

No.

No.

No. Some staff are just in charge of animal care and cleaning. Don't really need much more qualifications

Not needed

Not sure

Not to fussed on academic qualifications

Nothing

Ok

Still studying at the minute

There is something coming through for fencing where the workers might need some sort of qualification

This is all they will require

Would expect basic education and then hands on experience

Would expect that all employees would have gcse's at least.

B5c5. Can you provide any further details on this? PROBE FULLY AND RECORD VERBATIM

All will require

In the agricultural sector, an NVQ is a recognised qualification p it is relevant

N/a

No

No

No

No

No

No

No

Not at this time.

B5c6. Can you provide any further details on this? PROBE FULLY AND RECORD VERBATIM

A third level specialised diploma in floristry

All workers are capable

At this point not ready to employ

Attend courses at Greenmount or Loughry to keep sqp qualification

Bhs with at least standard one, child protection and first aid

Don't need any just need to know the tools of the trade

Everyone has to have that for us

Experience in surveying rivers and looking after a fish hatchery

General knowledge on the subject at hand

I just don't

I just don't think its practical to need to have a qualification (p) its more creative and hands on

I'll have to put them through the training if they don't have it

Just deliver timber no qual needed

Just him

Literate, trained

N/a to his business

Need numeracy skills p no

No
 No
 No
 No
 No
 No
 No
 No
 No
 No
 No
 No
 No
 No.
 No.
 Not sure
 Only one worker in the business-the owner. Do not need specific qualifications for this job.
 She would like to do teaching part time for floristry
 Sole owner ship – self employed, no other staff
 They don't think they will require any as they hope to retire in the next few years
 To provide cover for workforce while people are on training
 Tractor driving /p/ hgv licence /p/ computer courses /p/ training with company any materials are purchased for
 Worker has one
 Would help them with training but would like them to have experience

SECTION C: SKILLS GAPS

C1. Are you employed as [OCCUPATION]?

| | Frequency | Percent | Cumulative Percent |
|--|-----------|---------|--------------------|
| Managers | 780 | 78.7 | 78.7 |
| Skilled Trade Occupations | 108 | 10.9 | 89.6 |
| Elementary Occupations | 14 | 1.4 | 91.0 |
| Professional Occupations | 18 | 1.8 | 92.8 |
| Associate Professional & Technical Occupations | 2 | .2 | 93.0 |
| Administrative & Secretarial Occupations | 12 | 1.2 | 94.2 |
| Personal Service Occupations | 4 | .4 | 94.7 |
| Sales & Customer service Occupations | 7 | .7 | 95.4 |
| Process, Plant & Machine Operatives | 7 | .7 | 96.1 |
| Refused | 39 | 3.9 | 100.0 |
| Total | 991 | 100.0 | |

Unweighted base: 991 businesses

C2. Are other working owners or staff in this business employed as [OCCUPATION]?

| | Responses | | Percent of Cases (multiple Response) |
|--|-----------|---------|--------------------------------------|
| | N | Percent | |
| Managers | 205 | 25.3% | 33.3% |
| Skilled Trade Occupations | 187 | 23.1% | 30.4% |
| Elementary Occupations | 138 | 17.0% | 22.4% |
| Professional Occupations | 29 | 3.6% | 4.7% |
| Associate Professional & Technical Occupations | 9 | 1.1% | 1.5% |
| Administrative & Secretarial Occupations | 67 | 8.3% | 10.9% |
| Personal Service Occupations | 18 | 2.2% | 2.9% |
| Sales & Customer service Occupations | 20 | 2.5% | 3.2% |
| Process, Plant & Machine Operatives | 52 | 6.4% | 8.4% |
| None | 71 | 8.8% | 11.5% |
| Refused | 14 | 1.7% | 2.3% |
| Total | 810 | 100.0% | 131.5% |

Unweighted base: 616 businesses

C3. Within each occupational category identified previously please provide the exact number of staff employed at each occupational level.

| | Sum of staff |
|--|--------------|
| Managers | 503 |
| Skilled Trade Occupations | 528 |
| Elementary Occupations | 363 |
| Professional Occupations | 267 |
| Associate Professional & Technical Occupations | 129 |
| Administrative & Secretarial Occupations | 212 |
| Personal Service Occupations | 64 |

Unweighted base: 470 businesses

C4. How many of your [substitute with occupation name] would you regard as able to do the job to the required level?

| | Sum of staff able to do the job to the required level | <i>Unweighted base</i> |
|--|---|------------------------|
| Managers | 468 | 341 |
| Skilled Trade Occupations | 443 | 235 |
| Elementary Occupations | 348 | 176 |
| Professional Occupations | 249 | 73 |
| Associate Professional & Technical Occupations | 118 | 43 |
| Administrative & Secretarial Occupations | 161 | 108 |
| Personal Service Occupations | 57 | 47 |
| Sales & Customer service Occupations | 117 | 53 |
| Process, Plant & Machine Operatives | 195 | 83 |

C5. And thinking about your workers who are not fully able to do the job to the required level, which skills, if any, do you feel need improving?

| | Responses | | Percent of Cases (multiple Response) |
|---|-----------|---------|--------------------------------------|
| | N | Percent | |
| Technical and practical skills, (please specify) | 4 | 3.1% | 5.6% |
| Basic computing or Information Technology skills | 5 | 3.9% | 7.0% |
| Specialist computing skills associated with your business | 2 | 1.6% | 2.8% |
| Communication skills | 11 | 8.6% | 15.5% |
| Customer handling skills | 7 | 5.5% | 9.9% |
| Planning and organising | 7 | 5.5% | 9.9% |
| Team working skills | 5 | 3.9% | 7.0% |
| Foreign language skills | 1 | .8% | 1.4% |
| Problem solving skills | 6 | 4.7% | 8.5% |
| People management skills | 5 | 3.9% | 7.0% |
| Numeracy skills | 4 | 3.1% | 5.6% |
| Literacy skills | 5 | 3.9% | 7.0% |
| Marketing and sales | 3 | 2.3% | 4.2% |
| Accounts | 6 | 4.7% | 8.5% |
| Record keeping | 5 | 3.9% | 7.0% |
| Complying with employment legislation | 2 | 1.6% | 2.8% |
| Complying with other legislation | 1 | .8% | 1.4% |
| other skills, (please specify) | 5 | 3.9% | 7.0% |
| Don't know | 36 | 28.1% | 50.7% |
| Refused | 8 | 6.3% | 11.3% |
| | 128 | 100.0% | 180.3% |

Unweighted base: 71 businesses

SECTION D: SKILLS ISSUES

UPSKILLING

D1. Over the next five years, do you feel that there will be a greater need in the business for the following skills within the business?

| | Responses | | Percent of Cases (multiple Response) |
|--|-----------|---------|---|
| | N | Percent | |
| Technical and practical skills | 657 | 6.8% | 70.4% |
| Basic computing or Information Technology skills | 705 | 7.3% | 75.6% |
| Specialist computing skills associated with your business | 368 | 3.8% | 39.4% |
| Communication skills | 603 | 6.2% | 64.6% |
| Customer handling skills | 535 | 5.5% | 57.3% |
| Planning and organising | 668 | 6.9% | 71.6% |
| Team working skills | 541 | 5.6% | 58.0% |
| Foreign language skills | 118 | 1.2% | 12.6% |
| Problem solving skills | 561 | 5.8% | 60.1% |
| People management skills | 532 | 5.5% | 57.0% |
| Numeracy skills | 557 | 5.7% | 59.7% |
| Literacy skills | 576 | 5.9% | 61.7% |
| Marketing and sales | 566 | 5.8% | 60.7% |
| Accounts | 650 | 6.7% | 69.7% |
| Record keeping | 719 | 7.4% | 77.1% |
| Complying with employment legislation (ask before other legislation) | 587 | 6.0% | 62.9% |
| Complying with other legislation | 674 | 6.9% | 72.2% |
| Any other skills | 99 | 1.0% | 10.6% |
| | 9716 | 100.0% | 1041.4% |

Unweighted base: 933 businesses

Any other skills?

FARMERS verbatim comments (QD1)

A good working attitude is always essential.

Able to do own work, building and erecting sheds. Treating your own cattle - foot care

Animal welfare course,

Common sense

Common sense

Common sense

Cross compliant issues

Cut red tape (p) learn how to get around restrictions

Don't know specific individuals but broadly some would have these qualifications

Driving skills because there is a lot of machinery to work with – machine handling skills

Engineering skills possibly. P would be relevant for around a farm environment.

Environmental protection knowledge

Environmental training and good working practice

Environmental skills (p) i think that more awareness on how to be ["green" within the business is something that should be made available to farmers and believe it will come in in the next 5 years or so.

Expertises in vet end of it, ie attend to animals like a first aid course for them p

Farming is a way of life, you need practical experience instead of qualifications

Fix machines and help animals

Fixing machines, and servicing tractors p business planning and courses e.g. price, quality etc, p basic safety courses on a farm to save accidents p general day to day running of farm building looking after the sheds etc p environmental side p

Form filling skills (p) there's a lot of written work now that's very complicated

Getting help with form filling and getting around red tape

Good worker (p) no

Hard work is all you need, but nobody wants to do it /p/ nobody is interested in going into farming, it's dying out, too much hard work and not enough money in it

Having the ability to diversify p. Being able to think creatively on your feet

Health and safety skills

Horse training

How to get out of farming (p) there's no money in it

How to make money

Husbandry skills, animal welfare

I don't know a lot about computers but i know they are bringing in ID tags for sheep farming which will make life much more difficult for the farmer. More pressure on paperwork and to know about computers. Actually maybe it'll cut down on paper and more invoice scanners or things like that

Information on horticulture like how to grow plants

Information on how to diversify (p) ideas on what can be done with the land in wet summers

It depends on what line of farming they are in

Just be aware of basics, next generation of farming is weak

Just common sense!

Learn more about stock handling

Machinery maintenance

Manual, practical skills ie basic building, mending skills

Maybe some engineering skills /p/ more practical elements /p/ no

Mechanical skills

More co-operation between department workers and farmers

More daily running of the farm p

More practical skills /p/ i think in the future you'll see them introduce something like a tractor driving test

N/a

Need to be alert to stay in their property and stay in business

No interest in farming, it must be promoted at grassroots level

No it covers everything i can think of

Not skills but feel that could increase the amount of local farmers if there were more local colleges as it is an awful long journey travelling from the likes of Fermanagh to Greenmount

Nothing specific

People need to be well educated now to run a farm

Possibly something out side farming, trade etc (on a small farm.)

Pretty well covered

Set up a farmer cooperative, and have control over their own products. Plus a lot of factory operatives own the farms and therefore they can drive the market price down to meet their own ends.

Some course that was centred around literacy, numeracy, and it but it would need to be disguised in order for the farmers to do it.

Survival against prices especially for hill farmers

Taking training in the like of machine handling that kind of training

Training for younger people involved – because they have no interest in it – know a lot of farms that will have no-one to run them in a few years time

Welding, handy man skills.

You near need to have everything got work in farming /p/ mechanical skills, electrical skills, the whole lot.

You need to have a trades skill /p/ something like skills in building or plumbing, or mechanicing. You need to be able to fix or build in around the farm yourself to save on expense /p/ you need to have some trades

NON-FARMS verbatim responses

Ability to know their rights but with these rights to know their responsibilities.

Actually providing staff would be better as opposed to training. Even subsidise part of wages.

Animal welfare p no

Concentrate on vet nurses (p) they need skills with handling animals

Constructed apprecentage scheme, allowing individuals to do a variety of training courses as it is integrated skills

Creativity!

Driving skills

Engineering and mechanical skills

Financial awareness

Forestry skills, environmental conservation specific to my industry sector.

General common sense

Generally good worker, some one with good hygiene

Good manners taught to everyone – starting at home then at school

Hard to say

How to handle people, also basic machinery handling skills

Just been able to work with animals!

Learning policy and running campaigns – there are no degrees for that!

Machine operative course, similar to the way a fishing boat would have engineers, farms should have a similar employee

Management skills
 More courses for machines.
 Motivational skills
 Not sure. Hard to say in current environment
 Needs to be ongoing training in aquaculture
 No
 No
 No
 No answer given
 None
 None
 None
 None
 Passion for the job
 Physical skills p working with machinery
 Physically fit.
 Professional skill /p/ handling of machinery skills /p/ health and safety skills
 Short courses for expanding certain floristry techniques...like doing wedding flowers
 Skills in machinery, brickwork, laying levels etc.
 Small animal training
 Technical skills of products
 Vets. continually refreshing and updating their skills – compulsory
 Waste Management Courses

RESKILLING

ASK FARM BUSINESSES

D2. Do you or a family member currently working in the business plan to diversify or start up a new business in the next 5 years??

| | Frequency | Valid Percent | Cumulative Percent |
|------------|-----------|---------------|--------------------|
| Yes | 54 | 8.5 | 8.5 |
| No | 539 | 85.0 | 93.5 |
| Don t Know | 41 | 6.5 | 100.0 |
| Total | 634 | 100.0 | |

Unweighted base: 634 businesses

D3. What activities do you plan to start?

| | Responses | | Percent of Cases (multiple Response) |
|--|-----------|---------|---|
| | N | Percent | |
| Letting of buildings for non-farming use | 3 | 5.0% | 5.6% |
| Processing of farm produce | 7 | 11.7% | 13.0% |
| Sale of farm produce e.g. farm shops | 3 | 5.0% | 5.6% |
| Sport and recreation | 3 | 5.0% | 5.6% |
| Tourist accommodation and/or catering | 9 | 15.0% | 16.7% |
| Light engineering | 5 | 8.3% | 9.3% |
| Agricultural contracting | 2 | 3.3% | 3.7% |
| Other, please specify | 15 | 25.0% | 27.8% |
| Don't know | 12 | 20.0% | 22.2% |
| Refused | 1 | 1.7% | 1.9% |
| Total | 60 | 100.0% | 111.1% |

Unweighted base: 54 businesses

D4. Will you or those who will be involved need to develop any skills for this (or these)?

| | Frequency | Valid Percent | Cumulative Percent |
|------------|-----------|---------------|--------------------|
| Yes | 24 | 44.4 | 44.4 |
| No | 18 | 33.3 | 77.8 |
| Don't know | 12 | 22.2 | 100.0 |
| Total | 54 | 100.0 | |

IF YES AT D4

D5. Which skills do you or they need to develop?

| | Responses | | Percent of Cases (multiple Response) |
|---|-----------|---------|---|
| | N | Percent | |
| Technical and practical skills | 8 | 6.9% | 33.3% |
| Basic computing or Information Technology skills | 5 | 4.3% | 20.8% |
| Specialist computing skills associated for business | 2 | 1.7% | 8.3% |
| Communication skills | 9 | 7.8% | 37.5% |
| Customer handling skills | 7 | 6.0% | 29.2% |
| Planning and organising | 7 | 6.0% | 29.2% |
| Team working skills | 8 | 6.9% | 33.3% |
| Foreign language skills | 2 | 1.7% | 8.3% |
| Problem solving skills | 5 | 4.3% | 20.8% |
| People Management skills | 7 | 6.0% | 29.2% |
| Numeracy skills | 5 | 4.3% | 20.8% |
| Literacy skills | 5 | 4.3% | 20.8% |
| Marketing and sales | 12 | 10.3% | 50.0% |
| Accounts | 10 | 8.6% | 41.7% |

| | | | |
|--|-----|--------|--------|
| Record keeping | 8 | 6.9% | 33.3% |
| Complying with employment legislation (ask before other legislation) | 6 | 5.2% | 25.0% |
| Complying with other legislation | 4 | 3.4% | 16.7% |
| other skills (please specify) | 3 | 2.6% | 12.5% |
| Don't know | 3 | 2.6% | 12.5% |
| | 116 | 100.0% | 483.3% |

Unweighted base: 24 businesses

D6. Do you or a family member working on farm plan to seek off-farm employment in the next 5 years?

| | Frequency | Valid Percent | Cumulative Percent |
|------------|-----------|---------------|--------------------|
| Yes | 107 | 16.9 | 16.9 |
| No | 488 | 77.0 | 93.8 |
| Don't know | 39 | 6.2 | 100.0 |
| Total | 634 | 100.0 | |

Unweighted base: 634 businesses

D7. What sector do you think this will be in?

| | Frequency | Percent | Cumulative Percent |
|------------------------------|-----------|---------|--------------------|
| Agri-food sector | 20 | 18.7 | 18.7 |
| Other sector, please specify | 71 | 66.4 | 85.0 |
| Don't know | 16 | 15.0 | 100.0 |
| Total | 107 | 100.0 | |

Unweighted base: 107 businesses

SECTION E: TRAINING

E1. When was the last time someone in this business undertook training?

| | Frequency | Percent | Cumulative Percent |
|---|-----------|---------|--------------------|
| Within the last 2 years | 294 | 29.7 | 29.7 |
| 2-5 years ago | 139 | 14.0 | 43.7 |
| 6-10 years ago | 33 | 3.3 | 47.0 |
| More than 10 years ago | 64 | 6.5 | 53.5 |
| No training is undertaken within the business | 404 | 40.8 | 94.2 |
| Don't know | 57 | 5.8 | 100.0 |
| Total | 991 | 100.0 | |

Unweighted base: 991 businesses

E2. Did the business pay for any of this training?

| | Frequency | Valid Percent | Cumulative Percent |
|------------|-----------|---------------|--------------------|
| Yes | 185 | 62.9 | 62.9 |
| No | 104 | 35.4 | 98.3 |
| Don't know | 5 | 1.7 | 100.0 |
| Total | 294 | 100.0 | |

Unweighted base: 294 businesses

E3. How much has your business spent on training in the last two years? (using the following range)

| | Frequency | Percent | Cumulative Percent |
|---|-----------|---------|--------------------|
| Under £100 | 20 | 10.8 | 10.8 |
| £100-£249 | 21 | 11.4 | 22.2 |
| £250-£499 | 25 | 13.5 | 35.7 |
| £500-£999 | 33 | 17.8 | 53.5 |
| £1,000-£4,999 | 42 | 22.7 | 76.2 |
| £5,000-£9,999 | 5 | 2.7 | 78.9 |
| £10,000-£19,999 | 3 | 1.6 | 80.5 |
| £20,000-£29,999 | 2 | 1.1 | 81.6 |
| £30,000-£39,999 | 1 | .5 | 82.2 |
| £75,000-£99,999 | 1 | .5 | 82.7 |
| None, all training has been publicly funded | 3 | 1.6 | 84.3 |
| None, no money has been spent on training | 3 | 1.6 | 85.9 |
| Don't know | 23 | 12.4 | 98.4 |
| Refused | 3 | 1.6 | 100.0 |
| Total | 185 | 100.0 | |

Unweighted base: 185 businesses

[E4 Has any of the training been delivered through:

| | Responses | | Percent of Cases (multiple Response) |
|---|-----------|---------|---|
| | N | Percent | |
| Specialist land-based colleges (e.g. CAFRE) | 193 | 32.6% | 36.4% |
| Further Education colleges | 101 | 17.1% | 19.1% |
| Universities\Higher Education Institutes | 29 | 4.9% | 5.5% |
| Private providers | 167 | 28.2% | 31.5% |
| In-house training | 52 | 8.8% | 9.8% |
| None | 26 | 4.4% | 4.9% |
| Don't know | 24 | 4.1% | 4.5% |
| Total | 592 | 100.0% | 111.7% |

Unweighted base: 530 businesses

E5. Do you feel that any of the following are barriers limiting the amount of training undertaken in your business?

| | Responses | | Percent of Cases (multiple Response) |
|--|-----------|---------|---|
| | N | Percent | |
| All staff are fully proficient | 292 | 10.8% | 29.5% |
| Time is lost through training | 312 | 11.6% | 31.5% |
| The financial cost of training | 354 | 13.1% | 35.7% |
| No cover is available whilst staff\am being trained | 211 | 7.8% | 21.3% |
| Lack of any subsidy for training | 223 | 8.3% | 22.5% |
| Lack of information about training opportunities | 178 | 6.6% | 18.0% |
| Can't find suitable training | 142 | 5.3% | 14.3% |
| Courses run at the wrong times\formats (full\ part-time) | 129 | 4.8% | 13.0% |
| Training providers are located too far away | 153 | 5.7% | 15.4% |
| Poor quality of training | 62 | 2.3% | 6.3% |
| Lack of time to organise or conduct training | 120 | 4.5% | 12.1% |
| Length of time since left school | 90 | 3.3% | 9.1% |
| Test at the end of the training | 53 | 2.0% | 5.3% |
| Lack of time due to caring for dependants | 53 | 2.0% | 5.3% |
| High staff turnover | 23 | .9% | 2.3% |
| Other reason, please specify | 72 | 2.7% | 7.3% |
| None of these | 147 | 5.5% | 14.8% |
| Don't know | 76 | 2.8% | 7.7% |
| Refused | 6 | .2% | .6% |
| Total | 2696 | 100.0% | 272.0% |

Unweighted base: 991 businesses

E6. Using the following scale, where 1 is “agree strongly”, and 4 is “disagree strongly” do you agree with the following statements.

Range of training available has improved in recent years

| | Frequency | Percent | Valid Percent | Cumulative Percent |
|-------------------|-----------|---------|---------------|-----------------------|
| Agree strongly | 253 | 25.5 | 25.5 | 25.5 |
| Agree | 442 | 44.6 | 44.6 | 70.1 |
| Disagree | 84 | 8.5 | 8.5 | 78.6 |
| Disagree strongly | 23 | 2.3 | 2.3 | 80.9 |
| Don t Know | 189 | 19.1 | 19.1 | 100.0 |
| Total | 991 | 100.0 | 100.0 | |

Unweighted base: 991 businesses

If disagree or strongly disagree, state the reason why

FARMERS' responses:

£ From rural development has been hasn't been spent on training.
A lot of the courses aren't technical enough as a livestock producer, there is very few courses for me – much too basic
Because p no
Because the training schemes i have seen or heard about within dard are not worthwhile
Department not doing what they used too, wouldn't be as many open farm nights, tendency to smaller discussion groups making it less accessible to farmers. Too specialised, better to be able to pick up general info
Don't know (p) no
Don't know of many places that have offered training, no advertising
Don't think it has improved
Got worse p content of courses not specified enough p people who are teaching don't have enough knowledge of agriculture
Have to go far to get training, harder to get
Haven't seen any/ no evidence
He has applied for 2 or 3 part time courses and didn't get to do the courses through lack of funding
I feel that I'm none the wiser when i come out come out of them training things
I think the only way to train is hard work and nobody wants to do it these days
I'm not aware of any
It hasn't really changed much
It just hasn't!
Its become more generalised e.g. nvqs
Just don't think there has been a big change over the last few years
Just don't think there's that much out there
Many yrs ago there were more opportunities for young farmers to attend agricultural classes. Not there anymore due to cutbacks
More training used to be available in this area 10 yrs ago
Need more practical farming. People need to get more out on the ground!
No because we're self employed there's not much training needs to be done its a simple job with a need for common sense and hard graft which the young ones in the country dont seem to understand p no
No difference
No farm training available
No good training in local area that he is aware of
No reason to say yes, nothing has improved
No reason.
Non-existent at the moment
Not as good as it was twenty years ago
Not aware of any at all
Not enough common sense and the simple things aren't being taught
Not geared towards part time farmers (p) can't afford to take days of work to go to courses

Not much training available for farmers
 Not really aware of any training.
 Not very valuable, waste of time
 Remained the same as far as i can see
 Talk a load of nonsense
 The department is trying to stick to a budget and colleges are closing
 The list for training is always same old thing and nothing new
 The opportunities that they give for training are not suitable, always at busy times, and the hours they run, /p/ hard to suit everyone
 The people who train these programmes may never have worked on a farm in their life and people who have lived on a farm since they were born our expected to attend these programmes. It's ridiculous.
 There has been no training (p) never made aware of any anyway
 There is less training than when i was young
 There is no facilities available (p) no
 There is no training available for the poultry end of farming
 There is no training really available and it is poorly advertised
 There is very little about (p) farmers are not informed of courses
 There isn't very much training
 There would be a more farm related thought a few years ago.
 Think training is irrelevant
 Training doesn't make you a better farmer, you learn on the farm
 Used to be better
 You can only train yourself
 Young farmers from colleges are being taught to use pesticides and ruining land (p)
 this leads to bad long-term effects
 Young people are not really interested anymore so the level of training probably isn't as good anymore

NON-FARMERS' responses

Because there used to be funding and no funding now.
 Because I employ a man here who is over 30 and he learned a lot from training he went to. However I employ an apprentice as well and he hasn't learned much at all!
 Because of the limited places to do his course
 Been in contact with people who had been on courses and they weren't very good when it came to practical work
 By the time the material has been gathered for the training course has been gathered the need has changed
 Difficult to get type of training in animal care, difficult to find a provider
 Don't think it made it different
 Feel people don't understand as much as they used to
 Haven't had anybody offer training
 I am not aware of any local training
 I think years ago there was a lot more training. I received my training years ago and I feel there is a distinct lack of suitable courses now
 In Northern Ireland difficult to find proper training courses

It has improved but it has a long way to go p better specialist courses that are close to home are needed as they have to go to Inverness for their training
 It is not readily available
 It went away from the DARD
 It's not any different
 Lack of providers and more people to use it
 Meet your needs
 My training needs are very specialist so not available in NI
 N/a
 NO
 No adequate training in NI
 No new courses that address the needs of the business
 No reason given
 No training here have to head to England
 None available at minute specific to boarding kennels
 Not a high standard of training in this country
 Not aware of any
 Not enough specialist training, teaching staff not as dedicated as used to be e.g.
 Experience of staff attending Greenmount is not good in terms of the teaching.
 Not enough training awareness
 Not locally
 Not specifically for floristry sector needs more courses more flexible hours not enough experienced and skilled florists
 Not sure
 Nothing caters for my line of business
 Nothing in the field. Not applicable to Farming
 Same type of training available as before
 Some of the training that our business requires is not available in NI
 Stayed the same
 Still doing the same as what has always been done
 The business has taken employees on and they haven't got the general knowledge and specific skills required.
 The course doesn't really have anything directly related to do with the job
 The training wasn't suitable
 There is a total lack of training available in Northern Ireland
 There used to be training for younger people for agriculture but its no longer available in Fermanagh
 There's no advertising about it
 They don't really help people about construction
 Training is hard to get in the florist industry (p) training facilities are too far away to get to: 30 miles away (p) not convenient
 Training is more available
 Training required is specialist - just not available - and it is not provided in schools colleges or further education establishments
 Used to be 2 colleges, now only 1 available for training. Training too relaxed.
 Very hard to get training in this business - cant find it! Courses are not there

You haven't the right skills!...More work orientated....the last few years. They are work shy and they have ideas above their stations.

The training that is available meets our business needs

| | Frequency | Percent | Valid Percent | Cumulative Percent |
|-------------------|-----------|---------|---------------|--------------------|
| Agree strongly | 178 | 18.0 | 18.0 | 18.0 |
| Agree | 452 | 45.6 | 45.6 | 63.6 |
| Disagree | 108 | 10.9 | 10.9 | 74.5 |
| Disagree strongly | 30 | 3.0 | 3.0 | 77.5 |
| Don't Know | 223 | 22.5 | 22.5 | 100.0 |
| Total | 991 | 100.0 | 100.0 | |

Unweighted base: 991 businesses

If disagree or strongly disagree, state the reason why

FARMERS' responses

A lot of the training is not very practical /p/ it's not suitable for the small farmer, more in line with high intensive farming

Again i don't think they are worthwhile

Again not aware of any training - I inherited the farm like most farmers do and no training was experienced.

A lot of technical fields not necessary applicable to the farm

Because guys providing the training don't know what they're talking about

Because some training is ok but then the legislation changes and it leaves you in no mans land (p) I feel like wasting money going to training as the goal posts keep moving and the time and money I spent on training not even a year ago is no longer relevant

Contact thinks that the training doesn't really add to the business

Cut out bureaucracy and divert funds to training

Doesn't have access to training so doesn't think it would benefit

Doesn't meet any farming needs p you need money and it is impractical

Doing a lot for diversification and not what were doing on farms

Don't know

Don't know

Don't know p no

Falls a bit short

Few things, young fellas have come of age, young workers have no licence or insurance, costs money to put them through this.

Geared for more intense farmers, big farming businesses etc, not centred on small private farmers

Getting it readily available

Hard to get the correct courses

I don't go any training so I can't say

I don't see any training (p) its always too far away

I have been to a few courses, they haven't helped much or given me an advantage

I think there not enough training out there that meets farmers' needs /p/ probably the financial end of things /p/ training that would deal with accounts, cash flow - there needs to be more training in that area or with those type of things for farmers
 I'm computer literate, and I should be able to make my skills more readily available to other farmers.
 It is a small farm
 It's not really relevant
 It's not up to standard
 I've never been offered any training and would not know where to get it.
 I've never heard of any in the first place
 Just doesn't meet needs, doesn't ask what she needs
 Just feel it doesn't really meet our business needs! We had to do courses at the start on breeding management which was really good and so was this introductory course – things should had developed more – however they didn't and i feel they we just got to scratch the surface!
 Lack of training for all the new legislation that has been introduced into farming p.
 Therefore farmers are unsure of legislation
 Lacks certain aspects that are relevant p better range of courses p better short courses on how to care for animals, when they are sick and how to administer medicine p
 Market is changing so its hard to fit get the right courses to fit round a changing market
 More about time training programmes are at
 More training required.
 More widely available more suitable for part time farmers
 Most of the skills training are available at Greenmount but not taught adequately
 No more training would benefit me
 No training available
 No training that he is aware of
 Non existent at the moment
 Not aware of any training around so I can't say I agree
 Not enough towards equine industry
 Not enough training available
 Not enough young people taking up farming
 Not for diversification
 Not geared towards part time farmers (p) can't afford to take days of work to go to courses
 Not good enough not advanced enough to improve farmers
 Not really available
 Nothing, prompted three times and nothing p
 Room for improvement
 Same as previous (p) courses aren't specific enough
 Some of the training is just not relevant
 Speaking with a few people who have been on course, they wouldn't have been entirely happy with the training.
 The people who organise it are not farmers
 There could be more varied training and workshops

There doesn't seem to be anything relevant to me
 There is no information available to farmers
 There is no training available for the poultry end of farming
 There's nothing to do with pigs
 They don't require training as their farm is too small
 They must be strapped for cash at the minute
 They work towards ethical farming, no training is given in this area.
 Things that are needed there are no classes for it
 Think training is irrelevant
 Too far away
 Too general more practical training needed
 Too much red tape
 Training is usually daytime which isn't suitable, evening training would suit him more
 Training that we receive can't keep track with administration
 Very little training towards this line of business
 Well for one major reason, a lot of the training is some bright idea of a guy sitting
 behind a desk, they wouldn't know a real farm business or the ins and outs of how it
 works and they assume they can give advice.
 Wouldn't meet needs
 Young farmers are being taught bad farming practices

NON-FARMERS' responses

A lot of the training they want you to do is common sense, but you need a certificate to
 say that you have done it (p) no
 Availability again and it has grown quite specialist so most training in house and he has
 to go to the south for the specialist training
 Broad range, quite a mix of people with different
 Could be more specific to park needs
 Courses you require just not available, hard to research
 Don't know of any thing that covers what we do
 Don't think its up to scratch
 Have to look to find specific course and it is hard
 I suppose because I'm in a very specialist field, there's not enough specific training
 there for my type of work.
 In Northern Ireland difficult to find appropriate courses
 Isn't the exactly right training required
 It's just that the training is not needed
 Just a taster, not in-depth enough
 Most businesses need specific training
 Most courses are full time. Don't have the time for it
 Much the same reason – the apprentice I have isn't learning anything from training
 NO
 No adequate training in NI
 No places locally that meet the needs of my business
 No specific training for boarding kennels. Have to learn yourself
 No time for it

None available
 None available for their type of business
 Not adapted to our type of business
 Not a lot of training
 Not always relevant
 Not associated with florists
 Not enough for hand on jobs
 Not enough knowledge at intermediate level (school leavers) university graduates seem better equipped in the using of computer packages etc.
 Not enough specialist training
 Not improved
 Not local
 Not many relevant courses but may be a new course at a local tech.
 Not particularly equine slanted
 Not specific
 Not specific enough.
 Not up to standard
 Not very good training
 NOTHING FOR FLOWER Arranging
 Nothing out there that really applies to him. Keep informed about new legislation
 Nothing to do with animal incineration
 Nowhere does training for dog handling
 Only place to do their training is in Inverness p time is a worry as well because of lack of evening classes provided
 Sage level 3...difficult to get it in dgn ckstown and maragherafelt tech..don't run it, sometimes they say they will run it but then they dont get enough numbers interested in taking it and so don't run it. This course is something that this lady is very interested in doing but finding it very difficult to find somewhere to do it locally.
 Same again
 Same again, niche market
 Same reason – seen people come through and were not very good when it came to doing the actual work
 See above
 See previous answers
 Sometimes not relevant personally
 Sometimes the training is too general. Needs to b specific to horses. No point in training if not directly related to the task.
 Sometimes they focus on the wrong type of things p not particular to retail floristry Specified business sector.
 The time of the training is inappropriate. It needs to be done in the evening time as people find it hard top get days off for training
 The training wasn't suitable
 There always something else you can learn
 There is little training courses available for small businesses, and the courses available are very expensive
 There is no training available

There's nobody in the local area giving training in that area. A bigger city may offer more.

There's nothing specific to garden designers in the course

Things they require are not really out there, there is irrelevant parts on them. A lot of them are designed for more construction farming etc. So the business then has to adapt to something in the middle of these training methods

Training is scarce, all skills are developed while on job

Very specialist field p. Limited number of people working in it p. Hard to find the correct courses

We are a specialised profession and there is very little available locally, we would have to go to England

It is important that training leads to an accredited qualification

| | Frequency | Percent | Valid Percent | Cumulative Percent |
|-------------------|-----------|---------|---------------|--------------------|
| Agree strongly | 302 | 30.5 | 30.5 | 30.5 |
| Agree | 392 | 39.6 | 39.6 | 70.0 |
| Disagree | 113 | 11.4 | 11.4 | 81.4 |
| Disagree strongly | 30 | 3.0 | 3.0 | 84.5 |
| Don't Know | 154 | 15.5 | 15.5 | 100.0 |
| Total | 991 | 100.0 | 100.0 | |

Unweighted base: 991 businesses

If disagree or strongly disagree, state the reason why

FARMERS' responses

A farmer knows what he has to do and doesn't need anybody to tell him what to do
Always gain something, piece of paper meaningless as will always learn something from taking part in training.

Anything on the farm if a man was interested in the job, with appropriate skills and willing to do a hard days work as they can find anyone who puts their full potential into the job

Anything that he would train for to benefit self would not require a tangible qualification to let him know what he id capable of doing

As long as people learn the thing there being taught

As long as they are able to do the job that's all that matters p at the end of the day it is just a piece of paper

As you have and are about to get the job,

At my age not necessary

Because the greatest qualification for a farmer is common sense and that doesn't have letters after it!

Courses should focus on practical skills

Depends on your age, the younger you are the more important qualifications are.

Doesn't know

Doesn't matter about qualification if you have the skills who cares!

Doesn't need to lead to a qualification

Don't agree that people with years of experience are seen as inferior to those with no experience but have gone to a one-day course
 Don't know
 Don't know
 Don't need a piece of paper to say you can do something, isn't important to somebody who is self employed
 Don't need a qualification to be a good worker
 Don't need qualifications for putting a lock a hay out!
 Don't need qualifications they are an extra (p) no
 Don't really care about getting any qualifications (p) its more of a hobby than anything
 Don't see any advantage (p) that's it
 Don't see why its important, if it improves your skills then a qualification is not needed
 Don't think qualifications are very relevant in farming
 Down the line it could be different, things chops and changes /p/ things are changing if farming, you might not need these qualifications later on /p/ no
 Experience is more important in agriculture and more beneficial
 Farmers don't need qualifications as everything is learned on the farm (p) training is out of date from 1970s
 Farming is more about what you know than paperwork
 Farming purposes, learn through experience
 Feels the title is unnecessary
 I don't need one for I'm my own boss
 I don't think it's that necessary
 If I need the skills, I need the skills- it doesn't really matter about a qualification
 If it's a practical skill then if you possess the skill then it doesn't matter if you have a certificate to say so
 If its for things like quality assurance schemes then a qualification may be important but if not having a qualification is here nor there! In years to come legislation may make you have qualifications to farm and then it would become important
 If its leading to someone gaining more skills its doesn't matter if there is a piece of paper at the end
 If the training does its job it doesn't need to be accredited
 If you are committed to agriculture and so as long as you can do it an have knowledge to pick up things as you go along then you don't really need a certificate to show that you are capable of doing the job
 If you can do it it doesn't really matter about a piece of paper
 If you do the course and get a certificate without sitting exams like
 If you know it you know it, you don't need a certificate to say so
 If your trained it doesn't matter if you have a certificate if you can do the job
 Important to increase general education standards rather than distribute pieces of paper
 Is farmer is self employed this shouldn't matter, don't need a piece of paper to show
 It doesn't really matter to him
 It is for own use so no qualification is needed
 It is more practical
 It isn't important, its just a piece of paper

Its not something that interests me
 Its only pushing paper
 Just experience
 Just important that have the skills from the training not an accredited qualification p no
 Just need to know what to do!
 Just need to learn it, as long as they understand, no real qualification is required!!!
 Lisbilaw, Drumcrow & Ballantarso.
 Maybe young fellas looking for employment might need it but a farmer like myself
 already farming doesn't need it
 More important to get the experience than the piece of paper
 Most full time farmers don't even have qualifications - no need!
 Need common sense, not qualifications
 No need for a qualification (p) if someone learns something that's enough
 No need for it
 No need for it unless thing's change and we do need them
 No particular reason
 None needed
 Not a big issue more important to have practical experience
 Not important if you the skill it doesn't really matter about the qualification
 Not important in farming
 Not important to us (p) no
 Not in farming its not important to have a qualification-just know what you need to know
 Not necessarily
 Not that important for farmers
 Only important that they have the skills necessary and there's no value in an accredited
 qualification if you're not willing to put in the work p no
 Only need it if you need to show you that you need a job, not self employed p
 Only training on computers just need to know the basics
 Part time-helping us in our farm just
 People who farm all their lives can continue on farming without any accreditation and
 don't need it
 Piece of paper is worthless
 Plant processing jobs
 Practical end is what I'm interested in
 Practicality most important- certificate not as impt
 Qualification is just a piece of paper and does not actually mean the person can do the
 job. But not suitable in every case.
 Qualifications not needed. Its practical skills are more important.
 Seems to be geared towards ticking boxes rather than delivering the skills necessary
 for farmers to survive in the current climate
 So long as you are trained it is not relevant
 So long as you have the skills to apply them then having it in writing doesn't matter
 Specialist areas such as bee keeping and diversification areas.
 The training is good
 There is a position available for 'general farm work' - even though there is a lot of
 willing and qualified people for the job, contact cannot afford to take anyone on!

Think training is irrelevant
 To much none relevant courses, no hands on experience
 Trainee sales
 Training and doing it is most important
 U can train to help yourself without having qualifications
 We just get the work done ourselves
 Wouldn't matter very much
 You don't necessarily need a qualification to be proficient
 You go to learn for practical reasons

NON-FARMS responses:

A formal qualification is not important and not very significant bearing and who is recruited over another.
 A lot of staff go on courses. Not getting qualifications but are still getting useful training
 Also provide training as part of management consultations, not accredited as companies don't always ask for this
 Anybody could do our job and i haven't had to train
 As long as the information and skills to improve the business
 At the end of the day its just a bit of paper p if the person is able to do the job then that is suffice
 Because quite often the training they would do would be for further professional development and you don' need a qualification for that
 Because some people don't want to do an exam after they have trained! They just want to have learned a bit more and got the experience and the know-how!
 Better for business if you can say you're accredited.
 Build up your own
 Don't actually need any qualifications in this business.
 Don't get a qualification
 Don't know
 Don't know
 Don't necessarily need a qualification, it can just be an enhancement to a skill.
 Don't think it is necessary or important to get.
 End of the day its just a piece of paper p means more to me if they can actually do the work
 Experience instead of education, hands on training
 Family run business. Any training needed would be given by experienced staff.
 Hands on experience is the most important thing in this field
 Hands on experience learns a person better.
 I don't really believe in them qualifications, I feel if they are capable of learning the trade and doing the work its suffice
 I think it is more important if they have experience and know how to do the job
 If you can do the job you don't need a big qualification (p) no
 If you have the skill you don't need a bit paper to say so
 If you learn how to do the job it's not important that you get a qualification p learn from the course p it is a personal thing, you don't need a piece of paper at the end of it p no

Individual skills, not full course

Its important not only to have confirmation that you have done the course but that you have understood it.

It's jus a piece of paper, I would rather someone who has worked and is experienced

It's only a piece of paper and it isn't necessary

Just in our line of business it does not really need to as shown by our staff who are able to carry out their duties and take on training without previous accredited qualifications /p/ no

Knowing the skills is enough

More gained through practical experience

Most important thing is that the training meets the needs of work the business

Need practical skills. Piece of paper doesn't always mean they are fit for the job

No

No need

Not all training is about qualifications p it is about understanding the benefits and features of products and being able to help the customer

Not always necessary. As long have action points and results at end and can measure the success of training. That's all that's needed

Not necessarily in farming. Not relevant

Not really necessary because generally qualifications from any previous training is not applicable to this sort of business but i suppose i would agree with any skills developed through training relevant to our business or that we provide in house it is important to gain certificate to show they have completed the training and have the skills required /p/

Only matters if change job

People come very well qualified and haven't been as good as those who have hands on experience

Practical experience required more than anything else

Qualification does not necessarily always mean that the person is competent and has all the practical skills necessary

Qualifications aren't needed, training for CSR isn't a qualification.

Same as before

Same as before

Some training is just catch-up

They are just trying to make money out of useless bits of paper/p/as long as somebody has the skills and ability to do the work that's all that matters

They don't need to have any paper work to show they past it just as long as we see the difference in the skills after they come back p no

To most people qualifications wouldn't be important to them

Type of training in the industry doesn't concern so much with paper qualifications

We can train them without them getting a qualification out of it.

With horses it would be more practical

You still go and learn something, don't need a piece of paper p if you learn then that is something in itself

E7. Does the business hold or is it working towards the Investors in People award or any other quality standards?

| | Frequency | Percent | Cumulative Percent |
|---|-----------|---------|--------------------|
| Membership of a Quality Assurance Scheme | 153 | 15.4 | 15.4 |
| Working towards Membership of a Quality Assurance Scheme | 19 | 1.9 | 17.4 |
| Hold Investors in People award | 5 | .5 | 17.9 |
| Working towards Investors in People | 17 | 1.7 | 19.6 |
| Not working towards any of the above or similar standards | 717 | 72.4 | 91.9 |
| Don't know | 80 | 8.1 | 100.0 |
| Total | 991 | 100.0 | |

Unweighted base: 991 businesses

E8. Does the business have...

| | Responses | | Percent of Cases (multiple Response) |
|---|-----------|---------|---|
| | N | Percent | |
| A written business plan/farm development plan | 122 | 12.1% | 12.3% |
| A written training and development plan | 27 | 2.7% | 2.7% |
| Both a business plan and a training plan | 52 | 5.2% | 5.2% |
| Neither | 775 | 76.9% | 78.2% |
| Don't know | 32 | 3.2% | 3.2% |
| | 1008 | 100.0% | 101.7% |

Unweighted base: 991 businesses

SECTION F: RECRUITMENT

F1. How many vacancies, if any, do you currently have in your business?

| | Frequency | Percent | Cumulative Percent |
|-------|-----------|---------|--------------------|
| 0 | 956 | 96.5 | 96.5 |
| 1 | 22 | 2.2 | 98.7 |
| 2 | 9 | .9 | 99.6 |
| 3 | 1 | .1 | 99.7 |
| 4 | 3 | .3 | 100.0 |
| Total | 991 | 100.0 | |

Unweighted base: 991 businesses

F2. Are any of these vacancies proving hard to fill?

| | Frequency | Percent | Cumulative Percent |
|------------|-----------|---------|--------------------|
| Yes | 17 | 48.6 | 48.6 |
| No | 14 | 40.0 | 88.6 |
| Don't know | 4 | 11.4 | 100.0 |
| Total | 35 | 100.0 | |

Unweighted base: 35 businesses

F3 Are there any specific jobs that you find recruiting difficult for?

| | Frequency | Valid Percent | Cumulative Percent |
|------------|-----------|---------------|--------------------|
| Yes | 6 | 35.3 | 35.3 |
| No | 6 | 35.3 | 70.6 |
| Don't know | 5 | 29.4 | 100.0 |
| Total | 17 | 100.0 | |

Unweighted base: 17 businesses

F3B Which jobs do you have difficulty recruiting for? [take details]**FARMERS' responses**

shearing job

NON-FARMS responses

All over

Chief policy maker and campaigner

Finding a qualified florist is difficult

Horse care management p no

No one available with enough experience.

F4. What are the main causes of having a hard-to-fill vacancy?

| | Responses | | Percent of Cases (multiple Response) |
|--|-----------|---------|--------------------------------------|
| | N | Percent | |
| Too much competition from other employers | 1 | 6.7% | 16.7% |
| Not enough people interested in doing this type of job | 2 | 13.3% | 33.3% |
| Low number of applications with the required skills | 3 | 20.0% | 50.0% |
| Low number of applications with the required motivation, attitude or personality | 1 | 6.7% | 16.7% |
| Low number of applicants generally | 1 | 6.7% | 16.7% |
| Lack of work experience the business demands | 1 | 6.7% | 16.7% |
| Lack of qualifications the business demands | 1 | 6.7% | 16.7% |
| Poor career progression \ lack of prospects | 1 | 6.7% | 16.7% |
| Job entails shift work \ unsociable hours | 1 | 6.7% | 16.7% |
| Seasonal work | 1 | 6.7% | 16.7% |
| Other, please specify | 2 | 13.3% | 33.3% |
| | 15 | 100.0% | 250.0% |

Unweighted base: 6 businesses

F5 Have you recruited someone into the business as their first job after leaving...?

University?

| | Frequency | Percent | Cumulative Percent |
|------------|-----------|---------|--------------------|
| Yes | 77 | 7.8 | 7.8 |
| No | 899 | 90.7 | 98.5 |
| Don t know | 15 | 1.5 | 100.0 |
| Total | 991 | 100.0 | |

Unweighted base: 991 businesses

Further Education College?

| | Frequency | Percent | Valid Percent | Cumulative Percent |
|------------|-----------|---------|---------------|--------------------|
| Yes | 98 | 9.9 | 9.9 | 9.9 |
| No | 876 | 88.4 | 88.4 | 98.3 |
| Don t know | 17 | 1.7 | 1.7 | 100.0 |
| Total | 991 | 100.0 | 100.0 | |

Unweighted base: 991 businesses

School?

| | Frequency | Percent | Cumulative Percent |
|------------|-----------|---------|--------------------|
| Yes | 134 | 13.5 | 13.5 |
| No | 841 | 84.9 | 98.4 |
| Don t know | 16 | 1.6 | 100.0 |
| Total | 991 | 100.0 | |

Unweighted base: 991 businesses

F6 If yes, how well prepared for work have the people you recruited from... (use group below) been?

University

| | Frequency | Percent | Cumulative Percent |
|-----------------------------|-----------|---------|--------------------|
| Very well prepared | 21 | 27.3 | 27.3 |
| Well prepared | 38 | 49.4 | 76.6 |
| Poorly prepared | 9 | 11.7 | 88.3 |
| Very poorly prepared | 1 | 1.3 | 89.6 |
| Don't know\ varies too much | 8 | 10.4 | 100.0 |
| Total | 77 | 100.0 | |

Unweighted base: 77 businesses

F7a If poorly, or very poorly, why is that?

FARMERS' responses

for the big world, they have a lack of experience, too much info on rights and not enough worry on what their job entails

NON-FARMERS' responses

Common sense

Didn't have nothing extra..equine in CAFRE..thought that because did business degree would bring good ideas but didn't bring much more than was already in place.

Improved practical and communication skills.

Lack of confidence and common sense, poor literacy, no practical skills or experience p you couldn't trust them to write you a press release; it would be full of mistakes and lack elegance

Lack of field experience p and lack of skills in numeracy and literacy

No practical experience

Not enough knowledge to apply learned skills

See previous answers

They were not taught the right things, They are not ready to go out in to the open world

Further Education College

| | Frequency | Percent | Cumulative Percent |
|-----------------------------|-----------|---------|--------------------|
| Very well prepared | 22 | 22.4 | 22.4 |
| Well prepared | 50 | 51.0 | 73.5 |
| Poorly prepared | 11 | 11.2 | 84.7 |
| Very poorly prepared | 2 | 2.0 | 86.7 |
| Don't know\ varies too much | 13 | 13.3 | 100.0 |
| Total | 98 | 100.0 | |

Unweighted base: 98 businesses

F7b If poorly, or very poorly, why is that?

FARMERS responses

when they come to my business they have to start over, what they have learned is not applicable

NON FARMERS responses

Because they don't have any practical skills p less and less every year p don't even do woodwork skills and most can't hammer a nail

College didn't give the right training

Don't have cover customer training skills in college

Improved practical and communication skills.

Lack common sense p training they do doesn't relate to agricultural contracting

Lack of confidence and common sense, poor literacy, no practical skills or experience p
 you couldn't trust them to write you a press release; it would be full of mistakes and
 lack elegance
 Not adequate skills for the job
 Not enough training
 Same as before
 Same as uni. Poor experience
 Same reason
 They were not taught the right things, they are not ready to go out in to the open world

School

| | Frequency | Percent | Cumulative Percent |
|--------------------------------|-----------|---------|-----------------------|
| Very well prepared | 16 | 11.9 | 11.9 |
| Well prepared | 70 | 52.2 | 64.2 |
| Poorly prepared | 25 | 18.7 | 82.8 |
| Very poorly prepared | 6 | 4.5 | 87.3 |
| Don't know\ varies too much | 17 | 12.7 | 100.0 |
| Total | 134 | 100.0 | |

F7c If poorly, or very poorly, why is that?

FARMERS' responses

Completely useless p no interest in hard graft p didn't have the motivations or the
 common sense to do the simplest tasks p no
 He had no interest.
 Just don't understand how to go to work and get in on time(p)not really that well
 disciplined
 Not prepared to work p. Shock to system
 People I have hired in that situation lacked experience, but they are easier molder to
 the business, they can be trained as they go along /p/ i sponsor them and send them
 off to be trained, that is partly funded by the education system
 Poorly prepared but had right attitude

NON-FARMERS' responses

Basic numeracy and literacy skills are appalling and communication skills are very bad.
 Communication skills p cant talk straight to someone p numeracy skills
 Confidence in the working environment.
 Didn't have basic level to write read and communicate p
 Don't think they do enough on the basics p being on time p don't no what's required of
 them p not enough old school regime
 Everyone expects to work in an office and don't expect to work hard outside and put
 hard graft in
 Had to teach them

Improved practical and communication skills.
 It is a specialised job and they have received no training in the job yet
 Lack of field experience and lack of skills in numeracy and literacy
 No clue how to work with animals
 No experience
 No interest
 Not a lot of practical involved for experience
 Not great.. Don't have people management skills or team working skills or a good work ethic..have to drill it into them.
 Practical skills again
 Reality of the hum drum and heavy work load every day p cant handle the horse practically
 Same as above
 Same as before
 Same reason
 Start from scratch
 They are brain dead. The candidates haven't a clue, they can't read or write or don't have any grammar
 They need specific horse experience which they don't get in school
 They were not taught the right things, they are not ready to go out in to the open world
 Weren't willing to work as hard as is required for this job
 Wrong attitude expecting high wages too soon.

F8. In general terms how far would you agree or disagree that:

The schools system supplies people with the skills they need to start working with us

| | Frequency | Percent | Cumulative Percent |
|-------------------|-----------|---------|--------------------|
| Agree strongly | 45 | 4.5 | 4.5 |
| Agree | 330 | 33.3 | 37.8 |
| Disagree | 313 | 31.6 | 69.4 |
| Disagree strongly | 97 | 9.8 | 79.2 |
| Don t Know | 206 | 20.8 | 100.0 |
| Total | 991 | 100.0 | |

If disagree or strongly disagree please explain

FARMERS' responses:

A lot more could be done
 Agriculture is not in any school curriculum
 Because I think so much of it is practical - you learn through experience - as well as that at the age of 16 you wouldn't be experienced in operating machinery etc..
 Because I think you get trained on the job when farming!
 Because the type of farming, it is very specialised.

Because there are no relevant courses at school you only get that after at agriculture college
 CAFRE would have more related programmes but not secondary schools
 Common knowledge is better than school
 Cubs these days don't want this job(p)they want to be sat a computer like you
 Depends what school they have came from, some schools don't provide them with the necessary skills
 Doesn't get them ready for the real world
 Doesn't go in to farming at all
 Doesn't learn to do starting with us - leaves them that they all think they should be professionals
 Doesn't promote farming as a career, therefore doesn't prepare students for work on a farm
 Doesn't provide skills needed
 Doesn't prepare students for that p definitely not.
 Don't focus on farming
 Don't focus on farming business
 Don't have a big part in to play in delivering people to farming industry
 Don't have a work ethic instilled in them at school
 Don't have enough hands on experience.
 Don't have relevant courses
 Don't know
 Don't know
 Don't learn that much about it at school, just people from a farming background
 Don't promote farming, don't teach the skills needed
 Don't teach about farming in schools
 Don't teach anything about farming in school
 Don't think enough technical farming work
 Don't think enough vocational work is promoted at school
 Don't think the schools really have farming in mind
 Don't think they do much in relation to farming.
 Don't think they no much bout farming p they don't look at farming
 Don't think they offer the practical experience necessary
 Don't want to work in farming
 Enniskillen college about to close, no one wants to do it nowadays.
 Experience is the most important thing
 Farm gained experience
 Farming is the thing that you know and u grow up learning and schools cant teach this
 Few young people want to farm now because there's no money in it
 From experience (p) I just know that they focus on other jobs that are more highly paid, they like to teach a profession rather than educating people on working on a farm
 Growing up on farm is the only way of learning the skills
 Hands on experience required on farming.
 Hardly know what a farm was coming out of school these days
 Have no skill, they learn on the job
 Having a farming background almost essential no matter what.

He thinks that most people at school are not heading towards the agriculture sector
 I don't know (p) I really don't know (p) focus on other things, i'm not sure
 I don't know where they'd learn it p. Farming nowadays is getting far more complicated
 and it is putting young ones off getting into the industry
 I don't think it's hands on enough /p/ it doesn't show you any practical skills
 I don't think schools are interested in agriculture or encourage it
 I don't think they provide anything that you need for a career in farming /p/ if you take
 look at any other type of trade like plumbing that they teach, you never hear anything
 mentioned about agriculture
 I find young people, their work ethic is getting steadily worse - they want a much more
 cosy lifestyle and don't want to be annoyed. I know it's awful to generalise but it seems
 to be they way of it, it's getting worse every year
 I genuinely don't think that there is any focus on agriculture (p) focus is on other
 sectors like professional/business
 I think they need to go to Greenmount
 I think they would need to go to a college were they learn farming, they need more
 specified training
 If they come straight from school they would have no training
 It doesn't do enough for agriculture
 Its doesn't prepare them practically
 Its hard to teach someone farming in a classroom
 Its just not an area they cover
 Its more important to have attended an agriculture college (p) i don't feel that a school
 offers skills in farming
 Its not a popular industry, it is very manual-its more based on experience not what you
 learn at school. Schools are more focused on professionalism and the fact that a low
 wage is associated with farming, makes it unattractive to younger people and also an
 unattractive job for schools to promote to their pupils.
 Its not seen as a proper job anymore in the real world
 Its too technology based nowadays
 Just because i feel it might be best to go to somewhere like cafre because they're
 obviously specific to the farming industry p no
 Just because they don't they focus on more academic
 Just don't think they do
 Just learn general information (p) not specific farming skills
 Just not full knowledge of farming obtained from being at school p maybe just a few
 basic things like numeracy type things
 Lack of hands on experience.
 Lack of practical element p. School would not equip you on day-to-day farming tasks or
 farm management
 Lack of practical experience
 Lack of practical experience p. Health and safety
 Maybe go to a college to get experience
 More academic
 More based on the 8-5 hours, so no one is gonna want to put in long hours required
 within farming.

More emphasis should be put on farming.
 More farm related training could be done
 More information on farms should be given at school, certain amount of ignorance towards it
 More practical
 More practical skills ie no townies would know what to do
 More specific training for horses
 More than school
 More training in schools regarding animal husbandry, crops etc
 Most students wouldn't have interest in farming
 N/a
 N/a
 Need experience
 Need experience!
 Need more practical skills no manual work
 Need more training
 Need to be on the farm to get the run of things
 Need to be trained on a farm!
 Need to be working on farms /p/ practical skills that need to be acquired on the farm
 Need to go on to further education
 Need to go to agricultural college
 Need to go to somewhere like loughry college
 Need to teach more in schools (p) there's no encouragement for people to work in agriculture
 Never seen it (p) no
 No advantage to them
 No agricultural college. Need for one gone.
 No common sense
 No common sense
 No facilities in the area for training young people (p) nothing to encourage young people who are interested in farming
 No farm based skills. Not enough encouragement in schools for farming.
 No farming background is a major problem due to maybe lack of interest or hands on experience.
 No practical
 No practical approach
 No practical knowledge of the workings of a farm
 No practical skills p not enough hands on experience
 No practical skills in a school
 No practical training p.young coming out of school p. No experience
 No practical work done in schools
 No reason.
 No relevant skills for farm work
 No specific classes to help
 No specific farm training.
 No teaching is done in schools

No they need experience working around a farm
 No training for manual work
 Nobody interested in going into farming business anymore
 Nobody is interested in getting into it
 Nobody wanting to work in the farming business as there's no money in it
 Nobody wants to farm anymore
 Not any farming skills at school
 Not appropriate skills are learned at school to do with farming really p they are geared towards going onto learn further p don't see why people that want to go into farming need so many qualifications etc
 Not as many want to go into agriculture
 Not based towards farming
 Not centred on farming, doesn't promote it
 Not centred on farm work
 Not centred towards farming
 Not encouraged to go into farming through the schools
 Not enough emphasis put on manual labour
 Not geared towards farming
 Not getting any young lads coming into farming from schools
 Not many people want to work on farms
 Not much interest put on farming
 Not practical (p) school teachers don't know anything about farming
 Not really a school skill
 Not relevant classes
 Not relevant courses, school is more geared towards higher education courses
 Not relevant skills
 Not specific enough for agriculture
 Not specified enough
 Not targeted at farming
 Not taught anything about farming
 Not taught practical skills eg driving a tractor
 Not training farmers(p)getting students ready for college
 Not unless there at an agricultural college, normal schools don't teach them anything about farming
 Nothing taught specifically to farming
 Nothing to do with farming is taught in schools
 Only basic education provided
 Only for computer skills, nothing else
 Other than farmer's sons or others with practical experience of working on a farm there is no way of improving and developing at a schools stage for those who are interested in farming
 People aren't taught what is required to work in my business
 People need to move on to a college
 People with education think they are better than farmers
 Practical experience would be better than what schools, colleges and universities could provide

Practical skills would be lacking
 Probably not p farmers aren't really recognised
 Pupils are not taught about farming.
 School doesn't do training that would relate to farm work.
 School leavers have to be shown everything
 Schools are all about the theory, there is no common sense or practicality
 Schools are letting the agricultural end down
 Schools are not practical towards farming
 Schools didn't do anything in the past but have recently been looking into it but haven't started developing these schools yet
 Schools don't have a clue of what to do on a farm
 Schools have gone backways (p) children get everything to easy
 Schools just don't give the rite skills
 Schools wouldn't provide enough information on farming
 Should me more vocational training as farmers tend to learn directly on the farm
 Skills aren't taught the way they used to be...all theory, no practicality
 Skills don't apply to your line of work.
 Skills don't relate to that particular type of work.
 So few young people from farming backgrounds so don't have the skill necessary so don't know the work involved in the farming industry its not something they'll fully grasp in a book or by doing a test
 Some of the things learned in school i are not appropriate to farming
 Some specialist training needed
 Specialised job, no school subject teaches farming
 Supply and demand rule before any training
 Teach them a lot of rubbish
 Teaching not geared towards farming.
 The classroom is not hands on enough.
 The curriculum is not relevant to the agricultural business
 The ordinary schools do a bit of everything, you'd have to specify if u were interested in agriculture, you'd have to go to a specific agricultural school
 The school system doesn't really include practical not hands on skills more practical elements needed in school curriculum
 The schools teach them that they all want to be managers
 The teachers don't have a clue what their on about
 The theory of it may be very good but its lacking in the practical side
 There don't seem to be any skills taught in schools about agriculture
 There is no business knowledge or customer knowledge, no way with people or people knowledge, or what it costs to run a business..they think it is all profit!
 There is the obvious lack of training people in farming skills but a lot of people coming out of schools are very poor in numeracy and literacy also
 There's no real input from the schools to train students for the agriculture industry
 They are focused on other sectors that does not include agriculture.
 They are not geared in that direction, it wouldn't be worth their while to focus on farming skills
 They come out and there not interested in going into farming at all

They don't
 They don't (p) they focus on different s you can't learn it on a classroom
 They don't have a clue coming out of school
 They don't have a lot of practical experience
 They don't help much to teach people about farming
 They don't learn about farming in school!
 They don't provide any practical experience
 They don't provide training for farmers
 They dot teach about farms
 They focus on non manual work
 They guide their pupils towards university than towards practical jobs such as farming
 They have the brains but don't have hands on skills
 They haven't been taught about farming
 They need experience actually working on a farm to gain the standard and skills needed
 They need further training at places like Loughry or Greenmount
 They need hand on experience
 They prepare you in reading and writing but if you are looking at a future in farming there is no return in it whatsoever and you can't push children into something with which there is no return
 They would have to go to agricultural college
 They would need to be college trained or land based college trained before they start farming
 They would need to go to agricultural college
 They would not want to work on a farm (p) more academic than practical
 They wouldn't pay much attention to agriculture
 They should do more, they don't highlight farming as a job
 Through experience (p) don't give down to earth practical training, its more textbook an that does not work in reality
 To acquire the appropriate skills to work on a farm you would need to be born and raised on a farm. Not much is going to be taught in school of particular relevance in regards to the area of farming
 Too general
 Too specific for a small farmer p teach them how to use expensive machinery and often small farms don't have them so don't know how to do things without them
 Training doesn't apply to their type of farming.
 Trying to gear children towards other jobs
 Type of business.. Requires experience further training to do with farming
 Very poor training for agriculture
 We haven't employed anybody (p) had Greenmount students out and they didn't have the skills required - had no common sense or knowledge (p) no
 Well in the like farming, i don't know of anyone leaving education at that level would have done much at school in the line of farming skills
 What they learn their wouldn't be suited to a job in farming

When it comes to farming there are all the practical things that you don't learn at school (p) you learn the basics but not the practical things eg how to work machinery etc (p) don't get that at school (p) no

When they come out of school they generally need further training and more experience but it really depends on the persons background

Work in education and feels that schools are not lined up for people who wish to work in farming

Would require further training at the likes of an agricultural college

Wouldn't be educated on what's involved in a business environment.

Wouldn't be safe, as not trained to used machines

Wouldn't focus on farming

You cant learn in a classroom the skills needed to work on a farm

You don't need half of it p who needs history? Who uses foreign languages? Geography and science? Why put people to school for years? P people go to school until they are 25 and then they can't get a job p

You learn different things farming than in school

You learn it by working on a farm

You need a full training programme once they get there regardless of where they have come from

Young farmers from colleges are being taught to use pesticides and ruining land (p) this leads to bad long-term effects

Young ones don't want to work on a farm now

Young people don't receive any agricultural training in school, its what they learn on their farms at home

Youngest boy doesn't have enough training, from leaving school should offer more

NON-FARMERS' responses

Aren't prepared for work

Basic skills in literacy and numeracy but more skills needed

Basically not relevant to the work done in the industry, e.g. Don't know what tools are. Because they use computers all the time rather than their brain cells, and don't do any reading or writing

Because these children wouldn't have the experience unless they have a farm at home!

Because universities and FE colleges would tend to gear courses towards that us more

Children don't want a job at that age no motivation

Common sense

Degree is needed to be a vet

Depending on person, general knowledge isn't usual great.

Didn't when i was at school so i don't think it would have changed much now

Do not have proficient training after leaving school. He feels that school does not prepare people for certain jobs

Do take in students for a week at time on work experience..haven't a clue..don't know how to conduct themselves. Disaster..useless..play on mobile phones and don't know how to be professional.

Does not provide training for dog handling

Doesn't cater for business
 Doesn't teach the things that need in this industry such as agricultural side.
 Don't give them any experience of this industry
 Don't have necessary skills
 Don't know
 Don't provide enough skill based knowledge at all.
 Don't really know how to be professional..turning up late etc.
 Don't think there is enough practical stuff now. When i was at school we went to school 4days and went to tech 1day a week
 Don't think they do
 Don't think they do enough on the basics people being on time people don't know what's required of them people not enough old school regime
 Everyone heads to college now
 Experience is the key thing, they don't teach you about horticulture in school
 For that sort of job it's not something that's on the curriculum in school and people seem to go into it thinking it's the easy option but then find out they maybe don't have the training necessary
 For this particular business people need experience
 Found information on papers, article on how Tesco discovered that many workers with education did not have the basic skills needed for the job.
 From experience of working full time, think that people have very poor literacy skills who have come out of school. For example, very poor at writing letters
 Had a few work experience people in here standard not good
 Had so many and are useless
 Hands on experience needed
 Hands on training for people
 Have the skills but can't apply in practical situations
 Have to go and learn about working in a shop but you couldn't learn about this in schools
 Have to go further afield for the proper skills
 Have to learn totally separately not available training in school /people/ school does help with basic computing skills /people/ ability to read well is a big help and school helps with this
 Have to train them up in the business as it can only be learned through practical experience
 His background would help
 His business is specialised
 I don't think that it really prepares them for the working world people they will probably come across new challenges that they would never have come across before
 I don't think they provide enough people skills
 If you look at anybody who wants to do my job they aren't taught anything about animals in school
 Improved practical and communication skills.
 In her business you need qualifications from after school
 In northern Ireland difficult business to get trained employment in
 It has become purely academic school now days people in the past it was mental and practical together

It's a skill your born with
 It's hands on, schools can't prepare you for it
 It's just a specialist thing you have to do yourself
 It's not on the school curriculum
 Just because you read something out of a book doesn't mean you know it on the ground
 Lack of confidence and common sense, poor literacy, no practical skills or experience p
 you couldn't trust them to write you a press release; it would be full of mistakes and
 lack elegance
 Lack of information in schools about careers in this industry
 Lack of practical skills
 More emphasise on vocational skills!!!
 More training
 N/a
 Need experience hands and guidance, standards and systems. Need strong
 management.
 Need practical experience
 Need specialist training
 Need specialist training
 Need to go to college
 Need to go to Greenmount college for tractor training
 Need university degree
 Neither
 Never even got anyone for work experience
 No
 No
 No awareness of job specifics, skills or educated training in the industry
 No common sense
 No common sense lessons given
 No customer training skills
 No grasp of reality
 No jobs
 No land based courses. Has to go to Greenmount or somewhere
 No on job experience, feels that placement would be very helpful
 No practical skills given in school
 No real work experience.
 No relevant courses provided
 No specialist subjects
 No training/no experience
 Not applicable
 Not directed at farming, centred on more academic side. Only students with personal
 interest and experience of farming could cope.
 Not enough schools doing the relevant courses
 Not enough skills
 Not everybody is up to the job have to be practically minded
 Not in their line of work

Not practical
 Not providing skills about how to deal with animals
 Not ready for work
 Not something you would learn in school
 Not specialised enough too focused towards qualifications
 Not specific enough variable how people come out of school
 Not specified enough
 Not specified enough and do not have enough knowledge or practical skills
 Not specific training
 Not sufficient
 Not suited for type of work
 Not sure
 Not targeted
 Not taught in school /p/ tried with school, but only available training is private
 Not the required level provided
 Not the type of job most people would go for
 Not to do with business
 Not totally specific to job skills
 Not trained in the specific field
 Not used to hard work and have no concept of physical labour
 Only a certain amount to do
 Our job requires specialist skills so people generally don't receive these in schools, colleges or otherwise. Therefore it is probably impossible for these people to be well prepared. We need to provide them with the skills that they require when they arrive
 Our type of business is too specialist for those skills to be provided in school
 Proper skills not coming in fast enough eg hands on training as not every child is book focused
 Provide some skills don't provide enough practical experience
 Reality of the hum drum and heavy work load every day p cant handle the horse
 practically p can handle the physical work
 Same as before
 Same as before
 School couldn't train you for this job
 School leavers are too young to work with us.
 School system doesn't really supply specific farming skills. Greenmount supplies the more practical and farming specific skills.
 Schools are away to hell
 Schools do not teach specialist subjects
 Schools don't provide this
 Schools don't teach them a lot of common sense.
 Schools. Don't supply with specific dog training skills
 See above
 Specific training needed because the job is quite specialised and not something that can be learned in school or anywhere else bar through doing the training
 Skills needed are hands on skills and need to be involved with the work environment
 Some people seem to have poor social skills and team skills

Something you wouldn't do at school
 Sometimes they focus on the wrong type of things p not particular to retail floristry
 Specialised jobs with in-house training
 Specific job roles need specific training
 Specialist training required
 Systems seems to be copy and repeat and not training people to think for themselves
 Target away
 Tend to be more academic- except agricultural colleges
 The apprentice i have now learned more at home on his farm than he learned at school!
 The business is specialist and there would be no school with anything on the curriculum p he wouldn't change schools because it isn't a main stream subject
 The florist industry is too specialist an area (p) people don't have the communication and interpersonal skills when they get out of school
 The schools system is set up in such a way that those who want to learn will learn,
 The work we do is under ground p it is specialised skills so they need to know the tools of the trade and the school wouldn't teach them that p and we tend to stick to the same group of lads when we need them in because we know them well and know they can do it.
 There not skilled for my line of business (p) no
 They do not have the right work ethic and attitude from school p no
 They don't get the necessary experience
 They don't have a clue, don't understand the working world
 They don't really help people about construction
 They don't teach common sense at school
 They don't train them that much (p) no
 They haven't had the same opportunity to train for the job like a person who attended a university would
 They just focus on exams and not giving people the necessary skills
 They just would not be learning this type of work in school
 They need a number of years experience that schools don't offer, working in a business is a totally different scenario to school
 They need more experience.
 They need training specific to animal care which is not provided in schools.
 They were not taught the right things, they are not ready to go out in to the open world
 They would need further specific training
 To be a florist you must be specifically trained p they do not teach it in school
 Too young and cant get insurance for them.
 University degree is needed initially
 Very specialised training involved
 Very specialised.
 Very specific skills are needed which they don't get in school
 Very useless (p) very hard to get someone with interest in the job
 Would not apply to their business
 Wouldn't have the customer skills, basic interaction skills and particular practical skills needed for the line of work

Years ago the schools rang to see if there were any vacancies for students in agriculture' but today there is no opportunities like this for young people in Fermanagh
 You need a degree to be a vet
 Young people are brain dead (p) they don't learn any practical skills
 Young people don't understand work ethic

The FE system supplies people with the skills they need to start working with us

| | Frequency | Percent | Cumulative Percent |
|-------------------|-----------|---------|--------------------|
| Agree strongly | 63 | 6.4 | 6.4 |
| Agree | 461 | 46.5 | 52.9 |
| Disagree | 160 | 16.1 | 69.0 |
| Disagree strongly | 28 | 2.8 | 71.8 |
| Don't Know | 279 | 28.2 | 100.0 |
| Total | 991 | 100.0 | |

If disagree or strongly disagree please explain

FARMERS' responses

You can't learn it on a classroom
 A lot of courses are not specific enough to the specific area of farming they are trying to get into, they are too general /p/ they don't learn enough about their main enterprise
 Again i think they need to go to Greenmount
 Again maybe going to CAFRE would be best to get the specific skills needed in this industry p no
 Again same as before
 Again there could be more done
 Again they need experience
 Again wouldn't have relevant courses p only specialist schools like loughry college
 Again, CAFRE would have more related programmes but not secondary schools
 Again, they aren't practical and its hard to teach someone farming in a classroom
 All against farming
 Also wouldn't fully prepare students for that although not to the extent to which schools would
 As before, I think they focus on other professions
 Doesn't do anything to encourage young people into farming
 Doesn't provide skills needed
 Don't evidence to suggest that they do
 Don't know
 Don't know
 Don't learn that much about it there, just people from a farming background
 Don't need to know anything specific to start working on the farm
 Doubt if much info given on farming p difficult to get into farming due to high set up costs
 Farming is the thing that you know and u grow up learning and schools can't teach this

For the same reasons as before
 Growing up on farm is the only way of learning the skills
 Hands on experience required on farming.
 Having a farming background almost essential no matter what.
 Hey prepare you in reading and writing but if you are looking at a future in farming
 there is no return in it whatsoever and you can't push anyone into something with
 which there is no return
 I believe that most of it is on site training nothing that you can really learn in a college
 classroom
 I don't think they are interested in agriculture or encourage it
 I sent someone on a pig farming course and he came back after two days saying it was
 a waste of time because he got more training on the farm
 If not with agricultural college, won't learn about farming
 It takes a lot of hours to be a farmer and young people aren't prepared for that
 Its not a popular industry, it is very manual – its more based on experience not what
 you learn at further education colleges, they too are more focused on professionalism.
 Just an opinion
 Like I said so few young people from farming backgrounds so don't have the skill
 necessary to work on a farm so it doesn't really matter if they have the highest level of
 education the best way to develop the necessary skills to work on the farm is by a
 hands on approach on job training
 More academic
 More based on the 8-5 hours, so no one is gonna want to put in long hours required
 within farming.
 More designed for agricultural business
 More focused on academic than practical
 More knowledge leaving schools than colleges
 More practical
 N/a
 Need experience!
 Need on the job training
 No common sense
 No hands on approach, experience on the farm is the best.
 No practical approach
 No practical skills p not enough hands on experience
 No relevant skills for farm work
 No teaching is done in FE colleges
 Nobody wanting to work in the farming business as there's no money in it
 Not based towards farming
 Not centred on farm work
 Not centred on farming, doesn't promote it
 Not enough courses, due to lack of interest.
 Not enough money within the farming industry to focus on specific training
 Not much to educate people on farming. They'd need to grow up having an interest in
 it
 Not really (p) they just don't teach farming

Not relevant courses
 Not taught anything about farming
 Not taught in specification of farming
 Only if they go to the agricultural college
 People with education think they are better than farmers
 Practical experience would be better than what schools, colleges and universities could provide
 Same
 Same again
 Same as before no room for farming in FE
 Same as before.
 Same as previous answer – it doesn't do enough for agriculture – unless it is at the agricultural college
 Same as with schools – I doesn't really focus on farming
 Same reason again - so much of it is practical and can't be taught at further education college!
 Same reason as before
 See above
 Students lack of interest
 Supply and demand rule before any training
 That system doesn't teach about farming in my industry
 The courses don't relate to farming enough
 The curriculum is not relevant to the agricultural business
 The same again, the system gives them no interest in farming at all, the just want a handy five-day job
 The theory of it may be very good but it's lacking in the practical side
 There is no business knowledge or customer knowledge, no way with people or people knowledge, or what it costs to run a business..they think it is all profit
 There's no real input from this institution to train students for the agriculture industry
 They don't do enough to encourage agriculture either
 They don't go into farming or anything like that
 They don't have enough hands on experience (p) the training isn't realistic (p) they would not know what to do with day to day problems
 They don't help much to teach people about farming
 They don't provide training for farmers
 They don't teach about farming in FE colleges
 They don't want to work on a farm when they are at school
 They focus on non-manual work
 They have it in theory but need the experience as well
 They have no reality
 They just don't focus on farming
 They would have to go to agricultural college
 They would need to be college trained or land based college trained before they start farming
 They would need to go to agricultural college
 They would still need training

To acquire the appropriate skills to work on a farm you would need to be born and raised on a farm. Not much is going to be taught in school of particular relevance in regards to the area of farming
 To become a farmer you need hand on experience not to be stuck in the books
 Too general
 Training not aimed at farming.
 Try best but material is doubtful
 Waste of effort
 We haven't employed anybody (p) had green mount students out and they didn't have the skills required - had no common sense or knowledge (p) no
 When people leave school they don't want to go back and learn (p) none
 Wouldn't be safe, as not trained to used machines
 You need a full training programme once they get there regardless of where they have come from
 You need practical experience too
 Young people don't receive any agricultural training in school, its what they learn on their farms at home

NON-FARMERS' responses

?

Again they don't get the necessary experience there
 Again your not taught specifically about this job
 Again, Northern Ireland doesn't supply fully professional training/qualifications etc
 A lot of people who come in on work experience are in no way prepared and don't even have good manners.
 Anybody that's every come to work with has said that they learn more in the job than at tec
 Business does not need qualifications
 Course is not specific
 Degree is needed to be a vet
 Does not provide training for dog handling
 Doesn't suit industry our business as you would need college/university experience
 Don't realise that you have to work physically hard
 Don't really need skills. just learn the job when your in it.
 Education system is deteriorating
 Enough training can be provided in store.
 Everyone's needs a specialised in a certain area if they are to work within agriculture
 Feels people in the FE system don't have interest in farming
 For this particular business people need experience
 Have to learn totally separately not available training in school, does help with basic computing skills though
 Have to train them up in the business as it can only be learned through practical experience
 Haven't learnt enough
 I wasn't prepared when i joined from a further education college
 I'm quite specialised and I believe they are basic

Improved practical and communication skills.
 It's a skill your born with
 It's just a specialist thing you have to do yourself
 Lack of confidence and common sense, poor literacy, no practical skills or experience p
 you couldn't trust them to write you a press release; it would be full of mistakes and
 lack elegance
 Lack of opportunities to do courses.
 Lack of practical skills
 Need specific training.. Learn as go along
 Need to go to college
 No again they have no experience unless they have been to Greenmount or CAFRE or
 somewhere like that!
 No courses available
 No courses to do with animal incineration
 No practical skills.
 No reason
 No relevant courses provided
 Not enough practical skills
 Not enough specific knowledge
 Not good enough training supplied in some schools!! Not good quality
 Not many of them do the subjects based round forestry
 Not provided
 Not ready
 Not specialised
 Not specific enough variable how people come out of school
 Not specific
 Not specified enough
 Not taught in school /p/ tried with school, but only available training is private
 Not trained in the specific field
 Papers have informed him about this
 Reality of the hum drum and heavy work load every day p cant handle the horse
 practically p can handle the physical work p but if they want to instruct it is good but
 that's it.
 Same
 Same again
 Same again
 Same again
 Same again
 Same again
 Same again
 Same as before
 Same as before
 Same as before
 Same as before, attend the college for training
 Same as with school leavers
 See above

See above

Specific training needed because the job is quite specialised and not something that can be learned in school or anywhere else bar through doing the training

Should teach more practical skills.

Specialised jobs with in-house training

The florist industry is too specialist an area

The system seems to be only creating jobs for lectures

The work we do is under ground p it is specialised skills so they need to know the tools of the trade and the school wouldn't teach them that p and we tend to stick to the same group of lads when we need them in because we know them well and know they can do it.

There is just a special set of skills we need

They are purely academic and technical colleges do have practical skills but most people choose literary skills

They don't learn any practical skills

They need experience.

They need to know how to muck out and handle a horse and they don't teach that in school

They were not taught the right things, they are not ready to go out in to the open world

To be a florist you must be specifically trained

University degree is needed initially

Unless you come into a business environment they wont no what their talking about

Useless, destroyed trades by turning them into academic pursuits,

We do it ourselves

You need a degree to be a vet

CAFRE supplies people with the skills they need to start working with us

| | Frequency | Percent | Cumulative Percent |
|-------------------|-----------|---------|--------------------|
| Agree strongly | 230 | 23.2 | 23.2 |
| Agree | 438 | 44.2 | 67.4 |
| Disagree | 65 | 6.6 | 74.0 |
| Disagree strongly | 21 | 2.1 | 76.1 |
| Don t Know | 237 | 23.9 | 100.0 |
| Total | 991 | 100.0 | |

If disagree or strongly disagree please explain

FARMERS' responses:

As before.

Could have offered another year and have more knowledge

Didn't learn anything overly useful

Don't know

Don't like NVQs

Due to credit crunch they are cutting back a lot

Experience

I don't think they offer skills that are suited to my business

I've had boys from them places working for me before and they weren't much use if you ask me p.

More based on the 8-5 hours, so no one is gonna want to put in long hours required within farming.

N/A

Need to teach more farming skills

No practical approach

No practical skills p not enough hands on experience

Not practical enough

Not relevant to contact's engineering side of his business

People need to have a diploma to be fit for the industry

Practical experience would be better than what schools, colleges and universities could provide

Same again

Same as before.

See above

Supply and demand rule before any training

The curriculum is not relevant to the agricultural business

The theory of it may be very good but it's lacking in the practical side

There's no real input from this institution to train students for the agriculture industry

There's not the right people teaching

These skills should be known before they go to an agricultural college

They don't do anything practical in those places in relevant areas

They would not know what to do with day-to-day problems when they come up with them in the farm (P) there is nothing like learning on a farm

Through experience again – no practical skills in a proper farm environment!

To become a farmer you need hand on experience not to be stuck in the books

Too large an establishment

Too much theory no experience

Waste of effort p few people use that education, they don't get the job they thought they would get p the education becomes inappropriate

We haven't employed anybody (p) had Greenmount students out and they didn't have the skills required - had no common sense or knowledge (p) no

Young farmers from colleges are being taught to use pesticides and ruining land (p) this leads to bad long-term effects

Young people are not prepared for work

NON-FARMERS' responses

Completely different type of training supplied by CAFRE...more farming specific, not related to dog grooming.

Courses are not available in these establishments to suit our business.

Courses aren't right

Different area from where contact works

Does not provide training for dog handling

Does support but until in the role wont b fully prepared

Doesn't do veterinary

Doesn't have the correct training either (p) they should be training people how to fix tractors instead of having to get someone from the manufacturer to come and do it

Doesn't suit industry our business as you would need college/university experience

Don't know

Don't think they do enough on the basics p being on time p don't no what's required of them p not enough old school regime

Doesn't really suit business

Education system is deteriorating

For this particular business people need experience

Had experience of people from there and they hadn't a clue

Have to learn it when you're in the job

It's a skill your born with

It's a vet clinic

It's just a specialist thing you have to do yourself

Learn how to look after plants but not practical skills

More for farmers

Need specific training

Needs to be shook up a bit.

No

No

No reason given

Not always

Not applicable – you need to know about animal care. P you need basic farming skills for this job; to run an equestrian centre p animal husbandry for looking after horses p the department of agriculture needs to step up and bridge this gap p there are no training schemes despite there being 86,000 horses in Northern Ireland

Not provided

Not taught about the business there

Not trained in the specific field

One course in England that they know of. Balloon and floral training

Papers have informed him about this

Same

Same again

Same again

Same again

Same again...not enough range of course for animal care...only veterinary available

Same as before

See above

See above

Sometimes

Specialised jobs with in-house training

The florist industry is too specialist an area

They are involved in agriculture and rural development and have learnt nothing about rural enhancement and running a fish hatchery

They don't learn any practical skills

They don't provide the skills there that would suit our business

University degree is needed initially

When you take them in they do things completely differently to him and its no less danger the way he does things to anybody but with the same results as them

Would not apply

You need a degree to be a vet

The University system supplies people with the skills they need to start working with us

| | Frequency | Percent | Cumulative Percent |
|-------------------|-----------|---------|--------------------|
| Agree strongly | 77 | 7.8 | 7.8 |
| Agree | 319 | 32.2 | 40.0 |
| Disagree | 172 | 17.4 | 57.3 |
| Disagree strongly | 62 | 6.3 | 63.6 |
| Don't Know | 361 | 36.4 | 100.0 |
| Total | 991 | 100.0 | |

If disagree or strongly disagree please explain

FARMERS' responses:

A lot of stuff is academic (P) lack of practical relevance talking about it is different than doing it

Academic rather than practical (P) farming is a poor mans job!

Again nobody wants to get involved in farming particularly if they have just came out of university

Again they don't teach about farming!

Again, it would have to be specified that you want to do agriculture p a regular university doesn't teach farming skills, they'd need to go to the agriculture school

Again, no specific classes to help

Again....feels graduates haven't got the practical skills needed

And again same as before.

As before.

Because they don't let them out on a farm-need to put them in a proper farm environment and monitor what they do, it's all in a classroom-needs to be more hands on. Most universities do not want hands on people, they want academic people-and its normally the people who are more hands on who will make the better farmers

Better with something in rural area

Born and reared on farm your not going to be taught much in school

Can't see them being interested in working on a farm p probably won't have necessary skills

College would give more practical skills

Contact feels that people coming out with a university degree have no interest in farming or agriculture

Depends what they are studying. You want someone who has done some farming, and has got some practical experience in farming. I know plenty of boys who did paperwork and they haven't a clue about farming, they need hands on experience.

Do it all out of a book and know nothing about the practical element p. Very hard to plan in farming

Doesn't apply to the ordinary farmer

Doesn't do anything to encourage young people into farming

Doesn't promote farming or put emphasis on it

Doesn't train for manual work

Don't encourage agriculture and wouldn't really know much about it

Don't focus on farming

Don't know

Don't learn that much about it at there, just people from a farming background

Don't need too much of an education to go into farming especially not university qualification as it would not really be specific enough for daily farm practice

Don't think its necessary p one year basic course run through Greenmount/CAFRE would be enough to prepare anyone with what they need to know about working on a farm and keeping the relevant records

Don't think they would learn anything in university about farming!!

Don't think young people coming out on uni would go into farming

Experience

Farming is the thing that you know and u grow up learning and schools cant teach this

Geared in another direction

Growing up on farm is the only way of learning the skills

Having a farming background almost essential no matter what.

Haven't heard about it or read anything about it

I don't know much about it, we are past all that skills, and we are not about to take anymore interest in it

I don't seem to see it and from what i hear agricultural colleges are the only places to learn about the industry

I just feel university doesn't prepare people for farm work! It might prepare them for the agricultural business, but not for physical work

I think it would be more towards, it wouldn't be going down the practical road (p)

practical thing is main thing in farming (p) have to go to agriculture college for that

working machinery (p) no

I think the degree I did in 2000 was a good agriculture course and it was replaced by a degree that only contained a proportion of agriculture. Therefore I feel the university system is going in the wrong direction

I think university training is too advanced for doing farming /p/ I don't think people who are in 3rd level training will want to drop down into farming, not with the money that they would be making

If people went to university it wouldn't be to go into farming!

If they went on that far in education, they wouldn't be seeking work on a farm

It doesn't transfer well

JUST HAVE THAT NOTION – NOT GEARED TOWARDS FARMING

Lack of interest

Lack of practical element

Lack of practical element p. School would not equip you on day-to-day farming tasks or farm management

Like i said so few young people from farming backgrounds so don't have the skill necessary to work on a farm so it doesn't really matter if they have the highest level of education the best way to develop the necessary skills to work on the farm is by a hands on approach on job training

Maybe too much education and not enough hands on experience.

More academically based

More based on the 8-5 hours, so no one is gonna want to put in long hours required within farming.

Need more hands on course instead of academic courses

Need to go abroad for a good agricultural, Harper Adams maybe

No need experience for practical farming

No need to be that qualified

No one that goes to University wants to work on a farm.

No practical approach

No practical skills p not enough hands on experience

No relevant courses for farming in university

No relevant skills for farm work

No teaching is done in universities

Nobody I know has came from there (p) no

Not based towards farming

Not centred on farming, more academically based

Not enough practical experience

Not focused on manual work

Not geared towards agriculture

Not geared towards practicality, which is most important side of farming

Not hands on enough, better growing up on the farm.

Not much farming skills given through university

Not practical

Not practical and the courses are not focused on agriculture

Not practical enough

Not prepared for the work place. Have it their head but they don't know how to do it.

Not related to farming

Not relevant

Not similar area as to area they are working in, more practical skills than university based skills.

Not targeted at farming. If someone was to go to university, they would not have much interest in going to the farming business.

Not taught the workings of a farm

Not the practical skills (P) they would definitely need training on a farm not out of a book –which doesn't happen in a university!

Nothing locally that would indicate that to me.

Out of touch with farming needs
 Over-qualified
 People in university don't have any interest in farm work
 People with an interest in agriculture will go to an agricultural college not university
 People with education think they are better than farmers
 Places like Greenmount would do it instead
 Practical end more beneficial than a degree
 Practical experience would be better than what schools, colleges and universities could provide
 Practical skills would be lacking
 Same again
 Same again they focus more on education and professionalism than a trade
 Same reasons as before (P) they more geared towards professional qualifications
 See above
 Skills aren't practical enough for there particular kind of work.
 Supply and demand rule before any training
 Take common sense away
 The same as before
 The skilsl acquired are different to the skills they need
 The theory of it may be very good but it's lacking in the practical side
 There are not interested in farming as a profession (P) they concentrate on professional jobs
 There's no real input from this institution to train students for the agriculture industry
 They again would not be practical (P) they would academic than hands on practical work
 They are above the level that he needs p a better more basic course is what he needs
 They are focused on other sectors that does not include agriculture (P) less practical skills but they know the information but it's the practical skills that you would need in my business
 They are just not interested in training anybody to farm
 They are more academic-you cant teach farming inside in a classroom environment.
 They are not practical (P) nothing job wise here for university students
 They come out of university are lazy don't want to do anything (p) no
 They come out with no experience of farm work
 They don't do any practical farm work which is relevant to work in my business
 They don't get the practical skills or experience that would be needed
 They don't help much to teach people about farming
 They don't provide training for farmers
 They don't put that much focus on practical work (P) I'd say that people who go to university would nearly always be over qualified
 They focus on non-manual work
 They have no focus on practical farming at all!
 They need experience actually working on a farm to gain the standard and skills needed
 They need more hands on experience at that age
 They think they are above when they come out

They would have no practical experience from going to uni
 They would have to go to agricultural college
 THEY WOULD NEED TO GO TO AGRICULTURAL COLLEGE
 They wouldn't be doing practical end of farming
 To become a farmer you need hand on experience not to be stuck in the books
 Too far of a qualification p people trained at Greenmount etc are qualified enough, but university is nearly too much
 Too much theory no experience
 Too removed from practical aspect of work
 University courses are more business linked and lead toward a specific career; contact feels that there is not a lot of interest in farming in students
 University doesn't focus on practical its more about writing and studying, so I don't think that university is the place to go for people who wish to gain skills to do farm work.
 University education would maybe be going too far with qualifications not necessary on the farm.
 University skills not relevant to type of business
 Universities wouldn't really train people for farming jobs more "clean hand" jobs
 Well, they don't really support people going into farming either, they wouldn't teach you much
 Wouldn't be coming to work here they would be asking for too much money
 Wouldn't be safe, as not trained to used machines
 You cant learn in a classroom the skills needed to work on a farm
 You cant learn it on a classroom
 You need a full training programme once they get there regardless of where they have come from
 You need practical experience too
 You need the experience of working on a farm p one or two years at Tech would be enough; many more years in university would be a waste of time. How much can you learn in a book?! It's a practical job! P people have come to this farm, very learned people, and they come and tell me what's what when I have all the experience

NON FARMERS responses

Again only one place in England that she is aware of
 Again you get no experience of this job until you get out and start into it
 Again, they would have no farm experience
 As before
 As before
 As before. University students are well educated. More brains.
 Because the courses available do not suit this business.
 Bit too advanced
 Course is not specific
 Courses not offered
 Disagree with the ordinary education system p ordinary people go for computers and don't want to work. Everyone wants to do office work that is handy and hard work with your hands people don't want to do now

Does not provide training for dog handling
 Does not teach people to apply skills properly
 Doesn't apply to the type of work
 Doesn't provide the right skills
 Don't feel they would teach the relevant course
 Don't give skills needed
 Don't need anyone at that level in this business
 Don't need degrees as such
 Don't need university for this, it's a vocational job
 Don't think they do enough on the basics p being on time p don't know what's required of them p not enough old school regime
 Dunno
 Education system is deteriorating
 Farming is something that is handed down from generation to generation, feels that uni students have no interest
 Floristry is just not relevant to universities as a profession
 For this particular business people need experience
 Have to train them up in the business as it can only be learned through practical experience
 I don't think they teach floristry in universities at all
 Improved practical and communication skills.
 In Northern Ireland poor qualifications/training provider, and therefore less interest in employing
 It just gives them a big head and leads them to believe that they are just as good if not better than others when they really have no proper experience
 It's a skill you're born with
 It's just a specialist thing you have to do yourself
 Just no particular uni skills would suit
 Lack of confidence and common sense, poor literacy, no practical skills or experience p you couldn't trust them to write you a press release; it would be full of mistakes and lack elegance
 Lack of experience and practical side of things
 Lack of practical skills
 More practical. No common sense.
 More technical skills
 Need specific training, not available in university
 Needs someone that could be hands on
 Needs to go to CAFRE. No land-based courses
 No
 No answer given
 No common sense or motivation
 No geological department left in Northern Ireland universities
 No practical skills.
 No reason
 No reason given
 No relevant courses provided

No specific courses
 Not as good as CAFRE etc for practical /hands on knowledge.
 Not many relevant courses. Done equine degree, theory fine, no practical experience or safety
 Not provided
 Not relevant
 Not relevant
 Not relevant to my business
 Not skilled enough
 Not specific to my business
 Not suitable for there work
 Not targeted
 Not targeted
 Not targeted towards farm labour etc. More academic approach
 Not taught in school /p/ tried with school, but only available training is private
 Not trained in the specific field
 Not used to work
 Over skilled
 Practical skills aren't taught there at all
 Same again
 Same again
 Same again, practical experience needed
 Same as with schools, unspecialised
 See above
 See above
 Specific training needed because the job is quite specialised and not something that can be learned in school or anywhere else bar through doing the training but i suppose the other skills like communication, team working or problem solving would be already be installed
 Specialised jobs with in-house training p not academic
 The florist industry is too specialist an area
 The nearest course is Sparsholt south of England
 The things that are taught are far too technical.
 The work we do is under ground p it is specialised skills so they need to know the tools of the trade and the school wouldn't teach them that p and we tend to stick to the same group of lads when we need them in because we know them well and know they can do it p it wouldn't suit a university graduate because it is manual labour not an office job suited for their degree.
 They are overqualified p no
 They don't come to people like ourselves (p) no
 They don't learn any practical skills
 They get no proper experience
 They haven't got enough experience in the business.
 They need a bit more training
 They were not taught the right things, they are not ready to go out in to the open world
 They would be over qualified.

To far away
 Training and experience
 University leavers are too qualified.
 University system doesn't supply the people I need
 Unsure p some applicants with degrees haven't had the life or job experience to take on the role
 We wouldn't need people at that level as they would be too well trained and likely not want to stay anyhow
 Would not apply to farming

Private training providers supply people with the skills they need to start working with us

| | Frequency | Percent | Cumulative Percent |
|-------------------|-----------|---------|--------------------|
| Agree strongly | 98 | 9.9 | 9.9 |
| Agree | 380 | 38.3 | 48.2 |
| Disagree | 67 | 6.8 | 55.0 |
| Disagree strongly | 23 | 2.3 | 57.3 |
| Don't know | 423 | 42.7 | 100.0 |
| Total | 991 | 100.0 | |

If disagree or strongly disagree please explain

FARMERS' responses

Again experience need for practical farming
 Could be improved
 Doesn't provide necessary skills
 Don't have good enough skills
 Don't have the best interest
 Don't know
 Don't know
 Don't no who would go to any of these courses
 Don't see any private trainers p you have to learn through university or the agricultural college
 Don't think there is enough private training
 Don't think they are good enough (p) too many invested interests of their own
 Experience
 Experience is best
 Haven't heard of any private training providers that do this sort of thing
 Haven't heard of them doing anything
 I just don't know of any that do!
 I show them as much by them shadowing me then any amount of studying and book work
 I would have them labouring and that's not training just hard work
 I wouldn't have the same confidence in a private trainer as i would in a college /p/ no

Is there any private training providers that educates people?
 Money would come first with them, not the benefit of farms
 Need to be on a farm
 No because only one or two would have the aptitude to do the work we do
 No practical work would be available
 No teaching is done with private trainers
 None that I know of that focus on farming
 Not geared towards horses- Fermanagh college is the best place
 Not much private training for agriculture
 Not that many suitable courses
 Nothing that can't be gained by self knowledge, farming can not be taught except through working on a farm
 Same again
 Supply and demand rule before any training
 Suspect that they would be a rip-off
 The costs
 The theory of it may be very good but its lacking in the practical side
 They come out and don't care less about going into farming
 They don't have enough experience
 They don't provide training for farmers
 They don't specialise in farming
 They don't teach farming skills, They put other things first
 They wouldn't know how to train a person well, they might not have had the right training
 They're only in it for the money, and they wont provide proper training.
 Too expensive
 Too expensive
 Not centred on farming
 Very general training offered. Nothing specific or useful
 What skills do you need for farming
 You have to be born on a farm or want to farm or have the skills for farming (p) you would not be in it for money (p) no
 Young people don't receive any agricultural training in school, its what they learn on their farms at home

NON-FARMERS' responses

Again, they would have no farm experience
 Because you'd just get training on site at the business
 Degree is needed to be a vet
 Don't have enough experience to train people
 Don't know any private training people who would provide the necessary skills
 Don't know of anybody
 Dont provide practical skills
 Don't teach too much
 Don't use private training
 Experience again its the only thing that gives you the skills to work in the business

It's a skill your born with
 It's just a specialist thing you have to do yourself
 No
 No course available
 No interest
 No one provides it
 No practical skills.
 No reason
 No reason
 Nobody done it nobody in the company has undergone private training
 Not any particular field
 Not beneficial or effective for the business
 Not proper qualifications to work with us.
 Not provided
 Not specific for landscaping
 Only doing it to get jobseekers.
 Poor quality of training.
 Same again
 Same again
 Same as above
 Same as before
 Same as before
 Specialised with in-house training
 That needs to be watched, not all are genuine.
 They charge a massive fee and they teach the people how to cut a dogs hair but not of
 a high standard p cutting hair is the limit of dog grooming that they have been taught
 They don't learn any practical skills
 They only have general construction courses, not any specialist courses related to
 contact's field of work.
 They were not taught the right things, they are not ready to go out in to the open world
 University degree is needed initially
 Unless you train nobody supplies them (p) no
 Would not be beneficial, just wants his workers to be skilled rather than qualified.
 You have to work with someone to learn the job. Have to be shown how to do it.
 You need a degree to be a vet

SECTION G: FINANCIAL ISSUES/ RECESSION IMPACT

G1. Are you able to indicate the turnover of the establishment in the last financial year? (non-farm, private businesses only)

| | Frequency | Percent | Cumulative Percent |
|----------------------------------|-----------|---------|--------------------|
| Under £10,000 | 19 | 6.1 | 6.1 |
| £10,000 - £49,999 | 41 | 13.3 | 19.4 |
| £50,000 - £99,999 | 27 | 8.7 | 28.2 |
| £100,000 - £249,999 | 15 | 4.9 | 33.0 |
| £250,000 - £499,999 | 15 | 4.9 | 37.9 |
| £500,000 - £999,999 | 17 | 5.5 | 43.4 |
| £1m - £1.9 m | 13 | 4.2 | 47.6 |
| £2m - £4.9m | 6 | 1.9 | 49.5 |
| £5m + | 2 | .6 | 50.2 |
| In operation less than 12 months | 8 | 2.6 | 52.8 |
| Don't know | 65 | 21.0 | 73.8 |
| Refused | 81 | 26.2 | 100.0 |
| Total | 309 | 100.0 | |

Unweighted base: 309 businesses

Are you able to indicate the budget of the establishment in the last financial year?

| | Frequency | Percent | Cumulative Percent |
|----------------------------------|-----------|---------|--------------------|
| Under £10,000 | 6 | 12.5 | 12.5 |
| £10,000 - £49,999 | 4 | 8.3 | 20.8 |
| £50,000 - £99,999 | 5 | 10.4 | 31.3 |
| £100,000 - £249,999 | 4 | 8.3 | 39.6 |
| £500,000 - £999,999 | 2 | 4.2 | 43.8 |
| £1m - £1.9 m | 1 | 2.1 | 45.8 |
| £2m - £4.9m | 1 | 2.1 | 47.9 |
| £5m + | 1 | 2.1 | 50.0 |
| In operation less than 12 months | 1 | 2.1 | 52.1 |
| Don't know | 12 | 25.0 | 77.1 |
| Refused | 11 | 22.9 | 100.0 |
| Total | 48 | 100.0 | |

Unweighted base: 48 businesses

G2 What challenges do you anticipate your business will face over the next 12 months?

| | Responses | | Percent of Cases (multiple Response) |
|---|-----------|---------|---|
| | N | Percent | |
| Economic conditions (e.g. producer prices, market conditions) | 560 | 27.0% | 56.5% |
| Increasing competition | 171 | 8.3% | 17.3% |
| Attracting appropriately skilled staff | 31 | 1.5% | 3.1% |
| Availability of finance | 206 | 9.9% | 20.8% |
| Complying with legislation | 132 | 6.4% | 13.3% |
| Labour costs | 98 | 4.7% | 9.9% |
| Cash flow | 279 | 13.5% | 28.2% |
| Geographic location | 55 | 2.7% | 5.5% |
| Seasonality of business | 122 | 5.9% | 12.3% |
| Keeping existing customers\business | 83 | 4.0% | 8.4% |
| No particular challenges | 75 | 3.6% | 7.6% |
| Other, please specify | 182 | 8.8% | 18.4% |
| Don't know | 75 | 3.6% | 7.6% |
| Refused | 2 | .1% | .2% |
| | 2071 | 100.0% | 209.0% |

Unweighted base: 991 businesses

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Appendix G – Glossary of Abbreviations

| | |
|-------|---|
| ABI | Annual Business Inquiry |
| CAFRE | College of Agriculture, Food and Rural Enterprise |
| DARD | Department of Agriculture and Rural Development |
| DEL | Department for Employment and Learning |
| EU | European Union |
| GNP | Gross National Product |
| GVA | Gross Value Added |
| HtFVs | Hard to Fill Vacancies |
| ICT | Information and Communications Technology |
| IDBR | Inter-Departmental Business Register |
| IER | Institute for Employment Research (University of Warwick) |
| LFS | Labour Force Survey |
| LSC | Learning and Skills Council |
| MAC | Migration Advisory Committee |
| NESS | National Employer Skills Survey |
| NVQ | National Vocational Qualification |
| ONS | Office for National Statistics |
| SIC | Standard Industrial Classification |
| SME | Small or/and Medium-sized Enterprise |
| SOC | Standard Occupational Classification |
| SSC | Sector Skills Council |
| SSVs | Skills Shortage Vacancies |
| UK | United Kingdom |
| UKCES | United Kingdom Commission for Employment and Skills |

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Lantra

Lantra, the Sector Skills Council for environmental and land-based industries, is passionate about skills and improving business performance.

Lantra helps businesses improve their performance by:

- Helping them identify, develop and fully utilise business-critical skills
- Managing national and regional projects which enable them to access funding and business support
- Providing a wide range of products and services which support skills and business development
- Influencing and shaping learning provision to meet their needs
- Undertaking research into current and future skills needs which supports an evidence-based approach to policy and public investment in learning and development.

Lantra supports individuals by:

- Helping them assess their learning needs, record their achievements and access learning so that they remain economically active
- Helping potential entrants make informed career decisions, undertake nationally recognised qualifications and progress into employment
- Developing National Occupational Standards, vocational qualifications and learning programmes which support entry into employment and career progression.

Lantra represents the interests of around 230,000 businesses and over 1.5 million workers and volunteers in England, Wales, Scotland and Northern Ireland. The sector covers 17 industries which are clustered around:

- Land management and production
- Animal health and welfare
- Environmental industries.

www.lantra.co.uk

The Alliance

Lantra is a member of the Alliance – an organisation comprising all licensed Sector Skills Councils (SSCs) – which together articulate the voice of the employers of around 90% of the UK's workforce on skills issues.

www.sscalliance.org

