

Land Based and Environmental Industries- Sector Intelligence Summary

Sector Profile

Whilst only 1.2% of regional gross value added (GVA) was created by the agriculture etc sector in 2004, this still amounts to £952 million. GVA per employee in the sector was just over £28,000 compared to £34,000 for the economy as a whole.

If we use the estimates from Lantra sector skills council (SSC) for its full sectoral footprint, there are around 76,000 employees in the wider land based sector in the West Midlands, with about 22,000 of these jobs being in farm based agriculture. Only a third of the sectors workers are employees, as the significant majority are business owner/proprietors.

Data we have for the characteristics of the workforce apply only to these farm based agricultural employees. Three-quarters of these are male, and there is virtually no ethnic diversity to the workforce. Half of these workers are aged 45 or over.

Over one in five agriculture etc workers do not have any qualifications, which is twice the overall average. Consequently, for measures of higher level qualifications is relatively low compared to all sectors.

Future Employment

Working Futures III employment forecasts relate to an estimate of employment within the Lantra sector footprint, but put the 2007 figure at a more conservative 50,000, compared to the 76,000 Lantra themselves estimate. However, forecasts suggest that overall sector employment in the West Midlands will fall by around 15,000 over the next decade. All West Midlands sub regions are likely to see reductions in land based employment and the fall is not confined to lower skilled occupations.

During this time however, retirements from the sector will create around 19,000 additional job opportunities across the region – some 7,000 of these are likely to be in skilled trades occupations.

Recruitment, Skills and Training Issues

There are fewer overall vacancies in the agriculture sector than the economy as a whole, with only 10% of land based businesses with current vacancies. However, 30% of these land based vacancies are hard to fill due to skills issues (skills shortage vacancies or SSVs). This rate is almost three times the average for all sectors.

Overall, the prevalence of skills gaps in agriculture is aligned with the whole economy average with 6% of the workforce being judged not to be fully skilled to undertake their jobs. Skilled trades are most affected by skills gaps.

Compared with 2005, there was more training being provided and undertaken in the agriculture sector in 2007. However, this still falls below the overall level of training in all sectors. In other measures such as whether employers have training plans and budgets, agriculture sectors are also less likely to have these in place than other sectors.

FE Enrolments by Local Office

LSC	2005/06 (FO5)		2006/07 (FO5)		2007/08 (FO4)		% Change 2005/6 to 2007/08	
	16-18	19+	16-18	19+	16-18	19+	16-18	19+
Birmingham and Solihull	175	217	154	164	149	136	-15%	-37%
Black Country	162	470	132	424	95	196	-41%	-58%
Coventry and Warwickshire	939	860	676	581	664	829	-29%	-4%
Herefordshire and Worcestershire	534	1,000	511	763	210	349	-61%	-65%
Shropshire	284	224	165	232	169	201	-40%	-10%
Staffordshire	493	666	959	534	161	381	-67%	-43%
WM	2,587	3,437	2,597	2,698	1,448	2,092	-44%	-39%

- Overall there has been a decline in FE enrolments and this is to be expected in a sector which is contracting.
- The most notable variation is in 16-18 enrolments in Staffs. In 06/07 Cannock Chase College had 481 enrolments in a Cross Industry Qualification and the college does not appear in either 05/06 or 06/07 data which affects the overall results. Rodbaston College also shows a 32% decline across several subject areas between 06/07 and 07/08.
- The top three qualifications for the sector are animal care, equine and cross-industry, however this data is affected by the one off appearance of Cannock Chase College as a provider of cross industry qualifications. The lowest enrolments (often single figure) include tractor driving, game conservation and pesticides. It is difficult to discern trends as the nature of the industry requires some specialist skills which will not attract significant volume of learners.
- The gender split is about 50/50 and the proportion of female learners has varied from 47% to 52% to 49%.over the last three academic years. This is higher than expected given the sectors workforce is 79% male and 95% white. The sector has an average of 2.5% of learners from a BME background. This may reflect that many of the occupations within the sector will be in rural areas and are less likely to be in the conurbations which have a higher proportion of BME residents.

FE Enrolments by Level

LSC	2005/06 (FO5)		2006/07 (FO5)		2007/08 (FO4)		% Change 2005/6 to 2007/08	
	16-18	19+	16-18	19+	16-18	19+	16-18	19+
Entry Level	58	174	33	61	#	#	-90%	-98%
Level 1	530	363	875	350	311	224	-41%	-38%
Level 2	1,062	2,262	746	1,765	767	1,470	-28%	-35%
Level 3	910	508	939	475	351	323	-61%	-36%
Level 4, 5 or higher	21	46	0	11	#	12	-86%	-74%
Unknown	#	84	#	36	10	59	67%	-30%
Total	2,587	3,437	2,597	2,698	1,448	2,092	-44%	-39%

Note: # less than 10 enrolments

- Only Coventry and Warwickshire, Herefordshire and Worcestershire and Staffordshire deliver at Entry Level with all sub regional offices delivering Levels 1 and above.

- Whilst there has been a decline in overall learners the percentage of 19+ learners at level 2 and 3 has remained relatively constant varying between 65% and 70% at Level 2 and between 15% and 18% at Level 3.
- For 16-18 learners the picture is more variable with Level 2 participation varying at 42%, 29% and then 53% over the last three academic years. At Level 3 the difference has been less marked at 35%, 36% and 24% for 05/06, 06/07 and 07/08 respectively.
- Performance at Level 4 is disappointing for both age groups. For 16-18 enrolments account for 0.25% of overall enrolments in 07/08. At 19+ there has been a decline from just over 1% of overall learners in 05/06 to less than 0.5% for the past two academic years.
- Even though there has been a decline in learners the top three qualification areas across all years and levels are (in order) Animal Care, Horticulture and Equine.
- Coventry and Warwickshire is the leading provider across the top three qualifications delivering the following volumes of the regions performance in 07/08: Animal Care - 85% of Level 2 and 40% of Level 3, Horticulture - 53% of Level 2 and 42% of Level 3 and Equine - 83% of Level 2 and 52% of Level 3.

WBL

Work based learning enrolments (All Learning Aims) by local office

LSC	2005/06 (P15)		2006/07 (P15)		2007/08 (P12)		% Change 2005/6 to 2007/08	
	16-18	19+	16-18	19+	16-18	19+	16-18	19+
Birmingham and Solihull	22	10	18	#	15	#	-32%	-30%
Black Country	40	#	22	#	#	#	-87%	-75%
Coventry and Warwickshire	147	95	160	70	191	56	30%	-41%
Herefordshire and Worcestershire	595	345	618	365	684	476	15%	38%
Shropshire	124	19	145	17	156	32	26%	68%
Staffordshire	243	142	160	98	115	71	-53%	-50%
WM	1,171	615	1,123	561	1,166	643	-0%	5%

Note: # less than 10 enrolments

- Overall enrolments for 16-18 year olds remain steady but this masks wide variations between sub regions. The Black Country showing a decline of 88% and Staffs a decline of 53%. Herefordshire and Worcestershire and Shropshire counterbalance this with an increase of 38% and 68% respectively.
- For 19+ learners it is similar in that regions showing significant increase or decrease in learners at 16-18 follow a similar pattern. The only exception is Coventry and Warwickshire which shows an increase of nearly 30% for 16-18 year old learners and yet a decline of 41% for 19+ learners.
- Three sectors predominate for both age groups. These are Farriery (the national centre is in the region hence the high figure), Land Based Engineering and Landscaping with 56%, 14% and 9% respectively of the overall qualification mix.

Train to Gain

Enrolments by local Office

LSC	2006/07 (P15)		2007/08 (P12)		% Change 2005/6 to 2007/08	
	16-18	19+	16-18	19+	16-18	19+
WM	0	74	0	264	0%	257%

- Three areas account for 96% of the enrolments. These are Fencing (48%) Landscape (30%) and Agricultural Livestock (18%). The other areas of Animal Care Environmental Conservation Equine and Game Conservation account for the remaining 4%.
- In 07/08 the only enrolments in Game Conservation is at Level 3 and the remaining Level 3 enrolments are Agricultural Livestock at 13% and Fencing at 2% of the overall enrolments.
- Overall success rates for 06/07 are 63% and for 07/08 are 70%. However the numbers are relatively small and so should be judged with caution. Fencing shows a success rate of 78% in 07/08 whilst Landscape shows 33% and Environmental Conservation shows 100% for the same period.
- There is concern at the small numbers of learners involved in TTG.
- NB-Results are only available for whole region and not sub region.

ESF Enrolments by local Office – current contract

LSC	2005/06 (P15)		2006/07 (P15)		2007/08 (P12)		% Change 2005/6 to 2007/08	
	16-18	19+	16-18	19+	16-18	19+	16-18	19+
Birmingham and Solihull	0	20	0	18	0	52	0%	160%
Black Country	#	#	#	12	#	13	50%	117%
Coventry and Warwickshire	55	#	30	#	36	#	-35%	-50%
Herefordshire and Worcestershire	42	0	41	0	43	0	2%	0%
Shropshire	0	0	0	0	0	0	0%	0%
Staffordshire	28	#	28	#	28	#	0%	0%
WM	131	32	104	38	116	70	-11%	119%

Note: # less than 10 enrolments

- 67% of ESF enrolments are at Level 1 and of these 99% are for 16-18 year old learners.
- Black Country has the fewest overall at 10% whilst Coventry and Warwickshire at 25% and Herefordshire, Worcs and Shropshire at 26% have the most.
- Cross Industry qualifications account for the highest proportion at 45%.

LLDD**Enrolments by programme for learners who have a disability or learning difficulty**

LSC	2005/06		2006/07		2007/08		% Change 2005/6 to 2007/08	
	16-18	19+	16-18	19+	16-18	19+	16-18	19+
FE	624	421	468	346	356	246	-43%	-42%
WBL	277	115	282	127	310	178	12%	55%
TtG	0	0	0	#	0	13	0%	100%
ESF	#	#	#	#	#	#	-17%	50%
Total	907	538	754	477	671	440	-26%	-18%

Note: # less than 10 enrolments

- The proportion of 19+ learners in FE with LLDD needs has remained constant at around 12% of total learners for the past three academic years.
- In contrast the proportion of 16-18 year old learners with LLDD needs was around 24% of total learners in 05/06 and 07/08 but dipped to 18% in 06/07.
- WBL shows a steady improvement with 19+ learners showing the largest increase from 18.7% of total learners in 05/06 to 27.7% in 07/08.
- Generally there has been a decline in the number of learners across all programmes with no information regarding LLDD.

Success Rates

- Overall success rate for FE shows a 2% improvement however Shropshire has a decline of 4% and The Black Country 8% between 05/06 and 06/07. All sub regions except Birmingham and Solihull and Herefordshire and Worcestershire show a decline in success rates for either one or both age groups.
- Success Rates for WBL have shown an improvement of 31% over the last three years to 58%. However floristry is a particular concern as the success rate has only increased by less than 5% over the past three years to 33% Between 05/06 and 07/08, the top four qualification areas all show significant improvements as follows: Equine - 23%, Farriery - 11%, Land Based Engineering - 40% and Landscape 23%.

Key issues and Responses**Key Issues Identified by Demand Side Profile and Sector Skills Agreement**

- A wide range of occupations fall under the Lantra footprint and historic issues with Standard Industrial Classification codes means that comprehensive data for the sector as a whole and also its sub sectors is difficult to obtain. However certain trends are common to several sub sectors.
- Employment is forecast to decline by 20% up to 2014, however there will still be a requirement for around 7,700 new entrants to replace those retiring or leaving the sector so there is scope to improve the take up of apprenticeships.
- There are about 15 thousand businesses in the West Midlands and two thirds are sole proprietors with no further employees and a further quarter have fewer than 5 employees.

- The workforce has a significant number of migrant, temporary and seasonal workers as well as volunteers in some sub sectors which affects the potential number of learners.
- There is significant demand for short courses, flexible delivery and non-accredited provision is highly valued within the sector.
- Other funding, e.g Rural Development Programme for England which supports knowledge acquisition and other skills training opportunities has the potential to attract learners from LSC funded activity.
- Diversification within the sector means some skills needs will fall into other sector footprints or be a higher priority for the learner, e.g a farmer diversifying into tourism.

Response

- Sector needs to ensure local provision meets predicted employment demands and allow for small numbers of learners in specialist areas e.g game conservation.
- Utilise Train to Gain flexibilities to improve take-up especially for volunteers and skilled but non qualified workers.
- The integrated Business Link marketing strategy for sector will promote skills as part of the business solution and should help improve take-up of all programmes.
- Apprenticeships should be promoted as Lantra revise existing frameworks to make more relevant for the sector.
- Providers need to be innovative in local delivery/group delivery to maximise learning. Promote good practice such as Warks College's plan to utilise suitable employers yards to deliver equine training.
- Broaden the remit of the TTG Provider group of Land Based College to involve more providers in addressing the full range of skills issues for the sector.