



A Survey of People in the Forest Industries in South Scotland

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1. Executive Summary

This report describes a study initiated by the SSFIC and conducted by Barfil Management Centre. It provides both 'hard' and 'soft' information and analysis about the human resource in the forest industry in South Scotland which is designed to inform policymaking.

At the core of the survey is a questionnaire which was distributed to 2000 people working in the forest industry, 370 responses were received. This information has been enriched with 13 pre-questionnaire individual interviews and 7 small-group post-questionnaire interviews involving 25 interviewees.

Section 2 of the report is a brief introduction. This is followed by a description of the project method in Section 3. The fourth section sets out the 'Findings' based primarily on the questionnaire responses. In order to assist interpretation of the numbers Section 4 includes some use of interview quotes. Section 5, 'Issues & Challenges', highlights the key areas in which we feel the project suggests that policymakers may wish to focus. It builds on the questionnaire findings with extensive use of the interview material.

The two key variables used for analysis were (1) Job Sector (Tree Nurseries, Ground Prep., Establishment & Maintenance, Arboriculture, Wildlife/Recreation/Conservation, Plant & M/c Supply/Maintenance, Harvesting-mechanical, Harvesting-manual, Forestry Management, Education & Training, Haulage, Timber Processing, Supplier of Materials/Services) and (2) Job Role (Management, Machine Operator/Technical, Manual Technical/Craftsman, Admin/Clerical).

Section 4 provides 'hard' numerical information about Age, Length of Service, Work Patterns, Routes Of Entry, Reasons for Choosing to Work In The Forest Industries, Methods Of Learning The Job, Intentions About Future Learning and Intentions to Leave. In a brief summary we can just give a flavour of the findings. There were considerable differences between Sectors and Job Roles but certain generalisations can be made - the forest workforce is 5 years older than the regional average and 10 years older than that of Edinburgh. One in twenty of our respondents were under 25 years old. Lengths of service tend to be long and average over 20 years. At least four-fifths of the workforce has worked continuously in forestry since they started, (the Education sector, at three-fifths, is the exception). Four-fifths of respondents worked full-time during the last year. 15% of workers in Ground Prep, Establishment & Maintenance and Arboriculture described their work as 'occasional/seasonal'.

Half of respondents with 'management' jobs originally entered the industry from a formal academic or technical course. Only one in twenty machine operators, technical and craft and admin/clerical workers entered that way - most of these, over two-thirds, had crossed over from other industries.

About one in five of the current forestry workforce intend to leave in the next five years, two-fifths of these are reaching retirement age.

Much of the 'soft' data obtained through the questionnaires concerned the factors which provide satisfactions, dissatisfactions and motivation for workers in the various sectors. Section 4.5 is rich in detail but some generalisations are possible. People are very positive about their involvement with the countryside, the variety of challenges and the sense of freedom often derived from being your own boss. On the other hand 'paperwork/red tape' and 'bad management/other people doing

a bad job' are the major causes of dissatisfaction. Poor pay was a problem for those in Ground Prep/Drainage, Establishment & Maintenance, Plant and Machinery, Harvesting (particularly Manual) and Haulage.

We wanted information about the stability of the four-fifths of the forest industries workforce which has no current intention to leave. 'Commitment' to the industry was high with half of respondents feeling that they are in their 'preferred industry' and a quarter describing forestry as 'their life'. Only 15% feel their work is 'just a job'. It should be noted that there were important differences between job roles and sectors.

The major Issues and Challenges discussed in Section 5 are organised under three interrelated headings: Recruitment: Attracting the right people in the right numbers, Motivating: making the Forest Industry a more desirable place to work, and Training: ensuring people have the skills the industries need.

1.1 RECRUITMENT: attracting the right people in the right numbers

The age profiles and the retirement intentions of workers in most of the forest industries suggest that even if there is little increase in employment it will still be a demanding task to find sufficient replacements. The replacement of human effort in some sectors by continuing improvements in machinery will no doubt continue - but even so, the existing workforce is still aging. If there is a need for expansion in any sector, with the exception of Wildlife/Recreation/Conservation, then recruitment problems will be harder.

1.1.1 The Level Of Need

There are major differences between sectors and job roles in terms of perceptions about recruitment needs. A particular exception is Wildlife Rec, which is seen as an attractive career option with ever improving opportunities and no recruitment issues. Nevertheless it is clear that there are currently recruitment challenges in many sectors, particularly those on the forest floor. Will things become more difficult in the future? This is very likely to be the case in most sectors. Why? Not because the industry is expanding but it's workforce is certainly aging and replacements must be found. Few of these will come from the traditional sources because the 'predisposing factors' are disappearing. From the interviews there are clear perceptions that the main factors affecting career choices have changed. We briefly discuss Family connections, On The Job Experience, Cultural Background, Predilection For Working Outdoors, Realistic Knowledge Of The Range Of Jobs In The Industry, and Seeing The Industry As A Reasonable Financial Opportunity. These factors vary in their impact on each sector but, with few exceptions, they have not worked in the industry's favour.

1.1.2 Understanding And Drawing From The Labour Market

The main sources of current recruitment represent different challenges. Ex-Forest Workers who can be called back are a diminishing pool as they age in line with the existing workforce. Career changers offer a hopeful source, but only certain sectors are attractive to those seeking a lifestyle change and obtaining the right training may be difficult. Young people entering from school are far less knowledgeable about what is available in forestry, many jobs are no longer available to them due to legislation and they may not see an obvious career progression. The career choice factors noted above may also operate particularly negatively for this group. Young people coming from college have made the career choice but forestry dedicated college course places have declined. Eastern European labour is beginning to appear in certain sectors, particularly doing the less skilled work. There is some evidence that more skilled work will also be attractive to this group and mechanisms to promote this are appearing. Women are a huge largely untapped labour market for forestry work. They constitute only 10% of survey respondents, compared to 46% of the national

work force. There are a small minority in management work; most of the others are in admin/clerical.

1.2 MOTIVATING: making the forest industry a more desirable place to work

Not all of the factors deterring recruits can be made positive but those working in many sectors find huge attractions which need to be communicated to potential recruits. The issue is not, however, simply one of Public Relations. There are real ways in which the forest industries are unattractive as career options for many potential recruits. These go to the core of the human relations culture of many of the forest industries as this section of the report shows.

Questionnaire and interview evidence suggests that for many people working in the forest industries, the work is rewarding and challenging. The on-going commitment to the industry is testament to the scale of these 'positives' in so far as they succeed in outweighing the considerable 'negatives' also expressed. However, for many, this equation would appear to be finely balanced. Perhaps more worryingly, for those outside the industry looking in, the equation would appear negative.

Crucial challenges exist which would seem to not only threaten retention of today's workforce but also to provide barriers to the successful recruitment of the people the industry will need.

1.2.1 Increasing The Financial Rewards

Few respondents chose forest work with financial reward at the top of their list of motivations. Nevertheless it is clear that some sectors (especially Manual Harvesting, Ground Prep, and Establishment & Maintenance) are in particular distress and some interviewees have described the situation as critical. More money, for example coming from a continued increase in timber prices, well distributed within the industry, would remove a major barrier to tackling some of the difficult challenges. Possible profits of landowners and large organisations would need to filter through the entire industry.

1.2.2 Improving Opportunities To Progress

Both the questionnaire and interview responses indicate that many workers in forest industries are dissatisfied with the lack of opportunities for improvement and advancement which are available. Only a minority of forest industries people think of career progress in terms of climbing up an organisational hierarchy. For most, forward movement in their work life may mean earning more than last year, or working towards a new qualification, or expanding the business. This issue arises for several reasons: employment has not been growing in the industry for some time, many businesses are very small, profitability is not high, the 'them and us' culture of some businesses, a lack of creativity in creating grading structures and promotion hierarchies, a limited view of the desirability of staff development beyond technical competencies.

1.2.3 Reducing The Burden Of Red Tape

Red tape was identified in the questionnaire responses as a factor which causes huge dissatisfaction in several forest industries. It is not just an emotional issue, the costs in time and resources which can result from unnecessary policing and control are perceived as considerable. Regulatory processes should place the lowest possible burden on any industry commensurate with achieving acceptable levels of control. Many sectors complained that the various regulatory bodies do not seem to collaborate with each other and much duplication of information provision, form-filling and inspections seems to result.

1.2.4 Improving The Supervision Process

There appear to be issues with the experience of working 'at the sharp end' in most of the sectors where this type of man-management is required. An old-fashioned 'us and them' mentality was frequently mentioned in interviews. There was little sense of involvement by shop floor workers in the progress of their organisations. This is particularly the case in Timber Processing. Supervisory 'man-management' skills appear to be in short supply and this is made worse by a context of poorly designed jobs, promotion structures, training schemes, and reward and control systems.

In sectors where there is strong short-term pressure on costs, the sceptical attitude to training generally is likely to be particularly dismissive of the need to learn and practise 'people skills'.

1.2.5 Ensuring Hours Of Work Are Not Excessive

The issue of work-life balance is one which affects several of the issues discussed in this section of the report. Many forestry workers saw long hours as normal, though they featured high up the list of 'negatives', and likely to be a deterrent to the next generation.

1.2.6 Improving Business-To-Business Relationships

The interviews created a picture of short term, hard-nosed relationships in which the cheapest quote wins the deal. Examples of collaborative commercial relationships do exist and are to be applauded, but tend to be the exceptions rather than the norm. On the forest floor, there are many who site short-term contracts as powerful barriers in preventing them planning the development of their businesses. Businesses cannot rely on a track record of good quality work to ensure prices which allow for investment in people and machinery. The lessons of the Clegg Report still need to be learned.

1.3 TRAINING: ensuring people have the skills the industry needs

It was not the remit of this survey to repeat extensive earlier studies of training in the forest industries. What we have done is to ask general questions about perceptions of the effectiveness of training and whether there are any problems with the current provision.

There are sectors where attitudes about training are positive. The views of Wildlife/Rec/Leisure staff and Forest Managers were particularly favourable.

1.3.1 The Impact Of Upskilling The Industry

As the forest industry has become more technologically sophisticated, the number of jobs requiring qualifications, certification, or specific skills has burgeoned. Concerns were expressed about whether technical skill levels are being achieved and managers were criticised for a lack of business skills and people skills.

Doubts were expressed about the limitations of certificated college courses as preparation for experiences in the forest. As the cost and complexity of machines increases it seems clear that the challenge to the training providers of producing worthwhile training with limited resources will become greater.

1.3.2 Developing A Positive Attitude To In-Career Learning

Apart from the in-forest professionals, and in common with many workers and employers in small-businesses, the attitudes to training in many forestry sectors are generally sceptical. Training in

managerial and supervisory skills is not highly valued. There are generally negative feelings about the system of compulsory 'tickets' required for many tasks. This is often seen as part of a controlling and exploitative process.

Forestry people are practical people who like to get on with the job. Training is not valued unless it ensures compliance with regulations or has an obvious short-term payoff. Management in many sectors does not think in terms of career development for themselves or their staff.

1.3.3 Bridging The gap Between 'Trained' And 'Professional'

In many industries, not just forestry, it is difficult and expensive to bridge the gap between what the education process produces and what employers need, this widespread economic issue is particularly significant in forestry because of the financial circumstances of many employers, the predominance of small businesses and the expense of the training process in certain sectors.

The problem is largely one of costs. For colleges to close the gap would require significant changes in funding. For employers to do so would require an increase in profitability and the will to devote resources. Some imaginative collaborative initiatives are being developed.

2. Introduction

2.1 Background

This report describes a study initiated by the South Scotland Forest Industries Cluster (SSFIC). The core questionnaire and interview based research was conducted by Barfil Management Centre between June 2006 and February 2007. Prior work by another organisation provided the contact details for those employed in the industry and Barfil Management Centre had conducted preliminary interviews and designed and previously developed a pilot questionnaire.

2.2 Objectives

The main purpose of this study is to provide information about the human resource in the forest industries in South Scotland which will inform policy making.

Specifically the study will:

- provide information about important 'hard' characteristics of the forest industries population working at craft, technical and management levels and in each sector of the wood chain (and key ancillary sectors). This includes age, gender, work location, work pattern, routes of entry and learning route.
- provide information about the 'soft' characteristics of the forest industry population including reasons for entry, work motivation and satisfaction, and potential for departure.

Within the limitations of its methodology the report will identify areas in which policy may need to be reviewed. Recommendations will be made for further work.

2.3 Geography

The geographical area covered by the study corresponds with the geographical boundaries of the Forestry Commission's new South Scotland Conservancy upon which the SSFIC boundaries are based. This includes the local government areas of Borders, Dumfries & Galloway, South and East Ayrshire Councils and, for the purpose of the study, North Ayrshire Council.

2.4 The project team

Brief CVs for the four staff at Barfil Management Centre are provided in Appendix A. Further information is available on our website: www.barfil.co.uk. We are an experienced business research, consultancy and training centre with a national client list but based in South West Scotland. We are not specialists in the Forestry Sector though we have worked with some forestry businesses on a training and consultancy basis for several years. During the design and investigation phases the project team drew on considerable assistance from forestry professionals.

2.5 Industry context - The SSFIC Census 2006

Alongside the study reported here, and providing an essential adjunct to it, the SSFIC compiled a database of all those known to be employed in each Sector of the forest industry.

This survey identified a total of 2861 full time equivalents currently employed in this region. This is broken down by sector in Table 1 below:

Table 1. South Scotland forest industry by sector

DESCRIPTION	Companies	Full time equivs	% Total
Nurseries	6	86	3.0
Grnd prep, Drainage, Road building / maintenance	19	81	2.8
Establishment & maintenance	59	253	8.8
Arboriculture	37	93	3.3
Wildlife/Recreation/Conservation man	11	16	0.6
Plant & machinery supply & maintenance	14	103	3.6
Harvesting - mechanical	35	199	7.0
Harvesting - manual	4	4	0.1
Forest management / consultancy	54	482	16.8
Timber haulage	12	151	5.3
Fencing	7	18	0.6
Timber processing	49	1289	45.1
Materials / services supplier	12	29	1.0
Other	9	25	0.9
Unknown	30	32	1.1
	358	2861	100.0

Inevitably this is an underestimate of employment in the industry. We believe that the real figure is more like 3,500 – 4000.

2.6 Terminology

As a survey team who are not experienced professionals in this field we have found it hugely interesting learning about the variety of skills and occupational challenges faced by people in forestry and related employment. One of the complexities we have had to get to grips with is terminology.

A particular semantic issue is created by the term 'industry' itself, which we have used freely along with 'industries' and 'sectors'.

We have not used the terms 'forestry cluster' or 'forest industries cluster' since these have even more technical implications which would make miscommunication by us inevitable. We have used 'forestry', 'forest industry' and, when wishing to emphasise the non-homogeneous nature of the activity 'forest industries', as generic terms to embrace the full range of forest related work covered by our respondents. We have used the term 'sector' to refer to parts of the overall forest industry. We do not believe this is a barrier to communication but we rely on the goodwill of those reading this report to forgive any contravention of the convention which they prefer.

3. Method

3.1 Study design

This study was designed to enhance our understanding of people employed in the forest industry in areas which would provide helpful information when policymakers address key issues.

Confidence in research findings is always increased when a mixed-methods approach is adopted. The survey was primarily questionnaire based but the analysis has been enriched by 13 in-depth interviews with individuals from a range of sub-sectors which were conducted during the questionnaire design process. A further 25 people were interviewed in small groups post-questionnaire to assist interpretation of the questionnaire results and further enrich the report.

The questionnaire was designed, piloted and then distributed to 2000 people who work in the forest industries.

This study was able to draw on the contact details in the 2006 SSFIC census database. The proportion of questionnaires distributed to each sector was roughly in proportion to their size.

3.2 Questionnaire

3.2.1 Structure

A 24-item questionnaire (Appendix B) was developed, piloted with a group of forest industry workers and refined. The final version achieved a Flesch Reading Ease score of 64.7% (the aim is 60-70%) and a Flesch-Kincaid score of 7.5, which indicates the number of full-time school years needed to be fully comfortable with the content (i.e. 12 years old).

The questionnaire consisted of three sections

Section one assessed the respondents' current work, specifically geographic region, time spent in the forest industry, pattern of work, sector and job type.

Section two assessed their work history, including their entry into the industry and their training.

Section three focussed on their views about their work and the industry as a whole.

3.2.2 Questionnaire Recipients

Questionnaires were sent to the majority of addresses on the Census database. 2000 questionnaires had been printed so employers were not sent sufficient for all their staff. They were asked to try to ensure that those given questionnaires were a full cross-section.

3.2.3 A Note For The Academically Inclined

In this report we have expressed the findings using the techniques which we feel best highlight the information within the responses. The statistical package which we used to process our data was SPSS version 11.5. The first draft of the report, simply drawing on SPSS, involved a raft of tests of statistical significance which few readers would find illuminating. However readers on an academic mission may obtain analysis directly through Barfil Management Centre.

3.2.4 Key Variables

The forestry industry is complex. General statements about the whole industry may be accurate but are unlikely to usefully inform decision-making. We chose two major variables which might

show interesting differences between the respondents: Job Role and Sector. The categories for these variables were developed in discussion with forestry professionals.

Respondents were asked to place themselves in one of 4 Job Roles:

- Management - e.g. Forest/Business/Harvesting/Conservation Manager
- Machine Operator/Technical - e.g. Lorry/Harvesting Equipment/Plant/Chainsaw Operator
- Manual Technical/Craftsman - e.g. Planting/Weeding/Fencing/Maintenance Operations
- Admin/Clerical

Respondents were also asked to place themselves in one of 13 sectors. The Sector options given are set out below together with a brief description:

Tree Nurseries

This sector includes those who manage and work in organisations which grow and provide young trees for planting.

Ground Preparation, drainage & road building/maintenance

This sector involves machinery operations to set up sites for planting and to provide drainage and roads throughout the forestry cycle.

Establishment & maintenance operations (manual)

Planting and weeding of young trees are the major work of this sector. Additional tasks such as fertilising, spraying and guarding are among the additional activities.

Arboriculture

Arboriculturists specialise in the management of individual trees. They require a particularly high level of skill with chainsaws, in addition to other skills, in order to resolve the many difficult and dangerous problems which arise.

Wildlife/Recreation/Conservation

The original deer-management work still exists but the sector is expanding to include a range of amenity related positions. This reflects the movement away from regarding forestry as purely for timber production.

Plant & Machinery Supply & Maintenance

This sector is concerned with the large, expensive, forestry machines. These organisations are different in nature from those dealing with materials and services.

Harvesting - mechanical

This sector consists of the management and operation of the large machines which fell trees, remove branches, cut usable lengths and transport them to the roadside.

Harvesting - manual

These workers were historically the main harvesting unit of forestry work. Nowadays they have been largely replaced by mechanical harvesters but are still required for some thinning work and to clear areas where machinery cannot be used or is uneconomic.

Forestry Management (Including Consultancy)

This sector covers managers and professionals working in organisations which manage areas of forestry (and provide consultancy to assist this process).

Education & Training

There is a wide range of courses available to all forestry sectors. This sector includes all those who design, manage and run such courses.

Haulage (any Forest Industry related transport, inc. equipment transport)

Those who manage and drive forest related transport services.

Timber Processing (Sawmills, pulp/paper mills, panel manufacturers, etc)

This large sector includes all those who work in the manufacturing enterprises which process round timber.

Supplier of materials/services

This sector is concerned with the provision of materials and services to the other forestry sectors.

In the design forum and the interviews there was a very high level of understanding and consistency of interpretation of the Job Role and Sector categories offered.

3.3 Interviews

13 individual interviewees assisted during the questionnaire design process. They were recruited using an invitation at the bottom of the pilot questionnaire and were chosen to represent all the major sectors and job categories. The interviews lasted about 90 minutes. The interview schedule continually evolved as new areas of inquiry were identified. The final schedule is shown in Appendix C. Participants were encouraged to discuss any matters they considered to be important once they understood the nature of the project.

Post-questionnaire, 25 people whose work covered all the forestry sectors, were interviewed in 7 small-groups. In each meeting we brought together people whose sectors relate closely and asked them to evaluate and interpret the questionnaire findings. We also encouraged broader discussion about the current state of the forest industry and its future. The interviews lasted about 2 hours.

All interviews, both pre- and post-questionnaire, were recorded, with permission. They were transcribed and each transcript was coded. The insights gained from the interviews inform the discussion of the questionnaire findings. Where helpful illustrative interview quotes have been fed into the report.

4. Findings

In order to build a picture of the current South Scotland forestry industry and the attitudes and perceptions of its workers, this section presents the findings of the questionnaire survey enriched with some insights and quotes from the supporting interviews. Although a preliminary analysis is made here, discussion of most of the key issues and policy challenges arising from the findings are left until Section 5.

4.1 Response rate

Of the 2000 questionnaires sent out, 370 were returned which represents an 18.5% response rate. This rate is comparatively low. In part this can be explained by the complex nature of an industry with many sub-sectors. Many recipients of the questionnaire may simply have not seen themselves as part of the industry. This can even apply to individuals such as drivers, administrators and clerical staff who may be more likely to relate to the work they do than the industry to which their employing organisation belongs.

A further important factor affecting the response rate was the extremely negative attitude of certain employers in the Timber Processing Sector. Some were dismissive of surveys generally and others were concerned that this particular survey would highlight the low level of morale in their organisations. Some employers expressed the idea that distributing the questionnaire would encourage staff to think about their morale and this might lead to dissatisfaction. This is a distressing reflection on the nature of management in at least part of this sector.

4.2 Profile of Respondents

4.2.1 Gender and Age

There were 331 men (89.5%) and 39 women (10.5%) respondents. Average age was 45 years. Men's age ranged from 17-75 years (average age 46.6 years), and women's age ranged from 23-63 years (average 43.5 years).

Age was examined within each of the job roles including management, machine operator/technical, manual technical/craftsman, admin/clerical. The table below shows the age distribution within each of these roles.

Table 2. Age distribution by job role

Job role	Number of respondents (who provided their age)	Age range (years)	Average age
Management	143	22-75	46.6
Machine Operator/Technical	96	18-73	43.8
Manual Technician/Craftsman	75	17-71	45.4
Admin/Clerical	32	24-65	45.3

There were no major differences in the *average age* of individuals within job roles although the *spread* of ages was greater for machine operators/technical and manual technicians/craftsmen than it was for management and admin/clerical.

Age was then examined within each of the job sectors. The table below shows the number of respondents, age range and average age for each sector.

Table 3. Age distribution by sector

Sector	Number of respondents (who provided their age)	Age range (years)	Average age
Tree nurseries	8	23-56	40.8
Ground preparation, drainage & road building maintenance	24	23-73	45.1
Establishment and Maintenance Operations	47	20-71	45.5
Arboriculture	12	33-64	44.3
Wildlife/Recreation and Conservation	35	24-60	44.5
Plant Machinery, Supply and Maintenance	5	23-60	45.6
Harvesting – mechanical	25	19-64	43.8
Harvesting – manual	13	31-67	48.8
Forestry Management	86	22-74	47.0
Education and Training	6	48-57	53.2
Haulage	27	28-65	45.2
Timber Processing	52	17-75	44.0
Supplier of Materials/Services	6	25-64	42.2

Differences can be seen in the age ranges between sectors. The average age was highest (53 years) in education and training, presumably because those employed in this sector tend to have already had careers in another part of the industry. The high figure (49 years) for manual harvesting is interesting, and perhaps concerning, given the demanding physical nature of the work.

Average age appeared to be similar (mid-40s) for the other sectors.

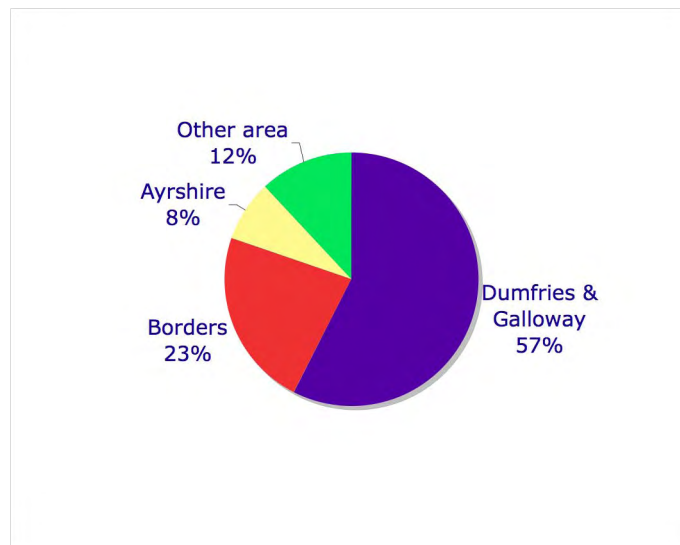
One general statement which can be made is that Forestry is not a young industry; there were just 16 respondents under the age of 25. Thus, our survey found that the industry generally comprises a middle-aged workforce with very few young people entering the industry to take up the baton in future years.

To put this in context, the Dumfries & Galloway Labour Market Report for 2004 shows an average workforce age of 40.4 with almost one in five under the age of 25 (compared to our one in twenty). This D&G average is itself a high figure - the average age of the Edinburgh workforce is 35 years.

4.2.2 Work location

The geographical spread of the work to which these findings relate is shown in figure 1

Figure 1. Percentage of time spent in each area



Most of the forestry work of the respondents is carried out in Dumfries and Galloway, about a quarter is done in the Borders, about a tenth in Ayrshire.

4.2.3 Job roles

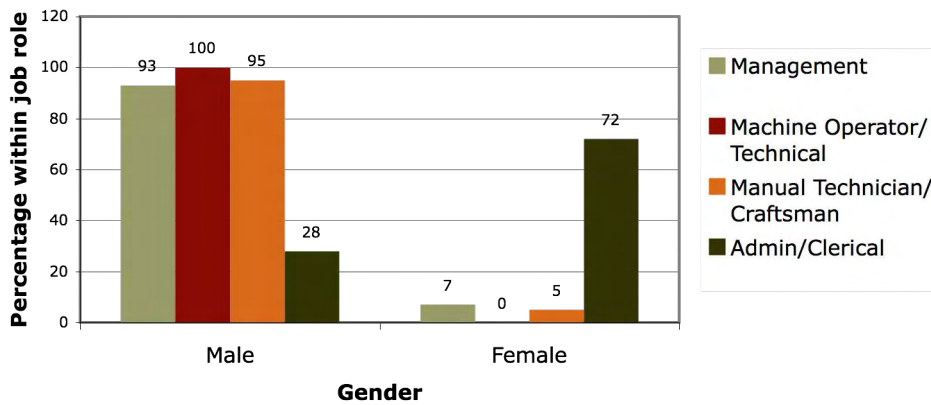
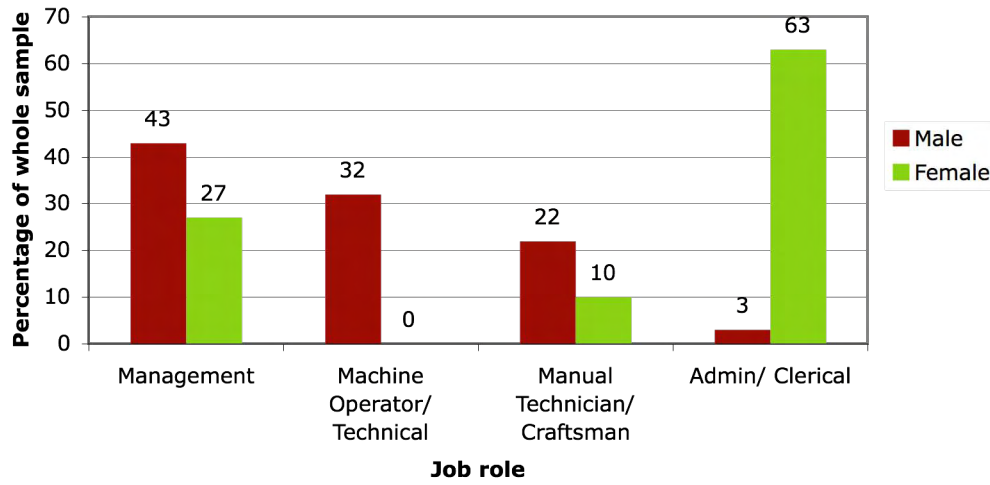
The table below shows the forestry industry jobs in which respondents spend most of their time.

Table 4. Forestry Industry Job Categories

	Frequency	Percent
Management	153	41.4
Machine Operator/ Technical	104	28.1
Manual Technician/ Craftsman	78	21.1
Admin/ Clerical	35	9.5
Total	370	100

Forty-one per cent were managers, 28% were machine operators or technical, 21% were manual technicians or craftsmen and 9.5% were administrative or clerical. These categories are presented by gender in the figure below.

Figure 2. Forestry Industries Job Roles for Men and Women



Overall, men were more likely to be managers, machine operators or manual technicians/craftsmen than women. Women were more likely to have administrative or clerical positions and there were no women respondents within the machine operators/technical category.

4.2.4 Industry sectors

The numbers of respondents within each sector are presented in the table overleaf.

Table 5. Number of Respondents in each FI Sector

	Number	Percent
Tree nurseries	10	2.7
Ground prep/drainage	24	6.5
Establishment/maintenance	50	13.5
Arboriculture	14	3.8
Wildlife/recreation/conservation	36	9.7
Plant and machinery	5	1.4
Harvesting (mechanical)	28	7.6
Harvesting (manual)	13	3.5
Forestry management	92	24.9
Education/training	7	1.9
Haulage	30	8.1
Timber processing	55	14.9
Supplier	6	1.6
Total	370	100

Comparing the above table with the findings of the SSFIC survey (table 1), our survey is broadly comparable although we had more responses from people working in establishment and maintenance, forestry managers, wildlife/recreation and conservation management, and haulage, whilst the plant and machinery and timber processing sectors were under-represented.

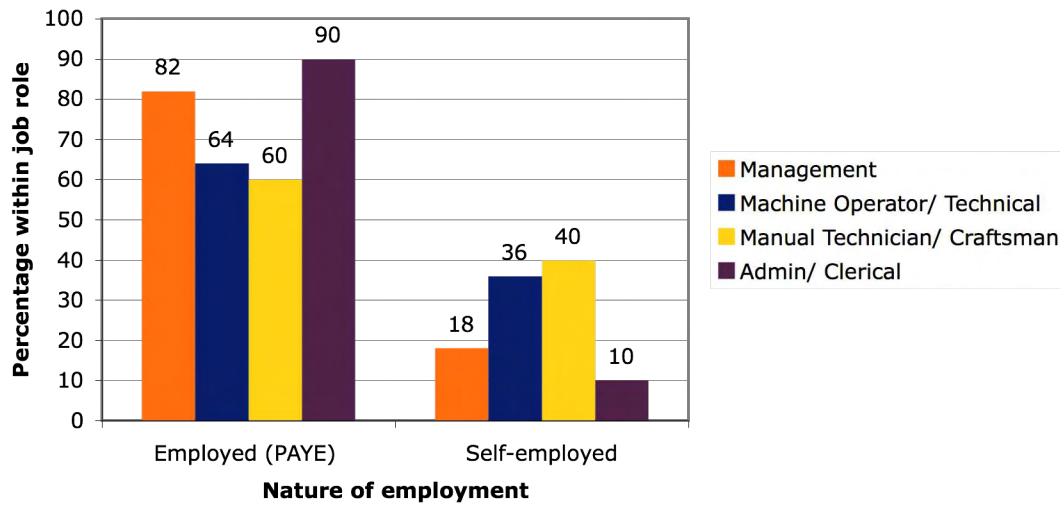
Anomalies between the Census figures on Sector populations and our returns may arise because our respondents were asked to place themselves in a Sector according to their job rather than according to the nature of the organisation which employs them. In most cases the responses would be the same however differences are particularly likely in the Forestry Management sector since these companies employ a range of people who allocate themselves to a sector according to their job rather than their employer. Thus someone working for Forest Enterprise as a Harvester defines himself according to his job as a Harvester not as an employee in the Forestry Management sector. For the purposes of comparing 'people' dimensions we are more likely to identify useful differences with our self-report method, however for other purposes to which the Census figures may be put the more 'economic' approach will be best.

4.2.5 Type of employment

Almost three-quarters of the respondents were 'employed (PAYE)' (73%) and a quarter was 'self-employed' (27%).

Type of employment was compared between different job roles and within sectors and the differences are shown in the bar charts below.

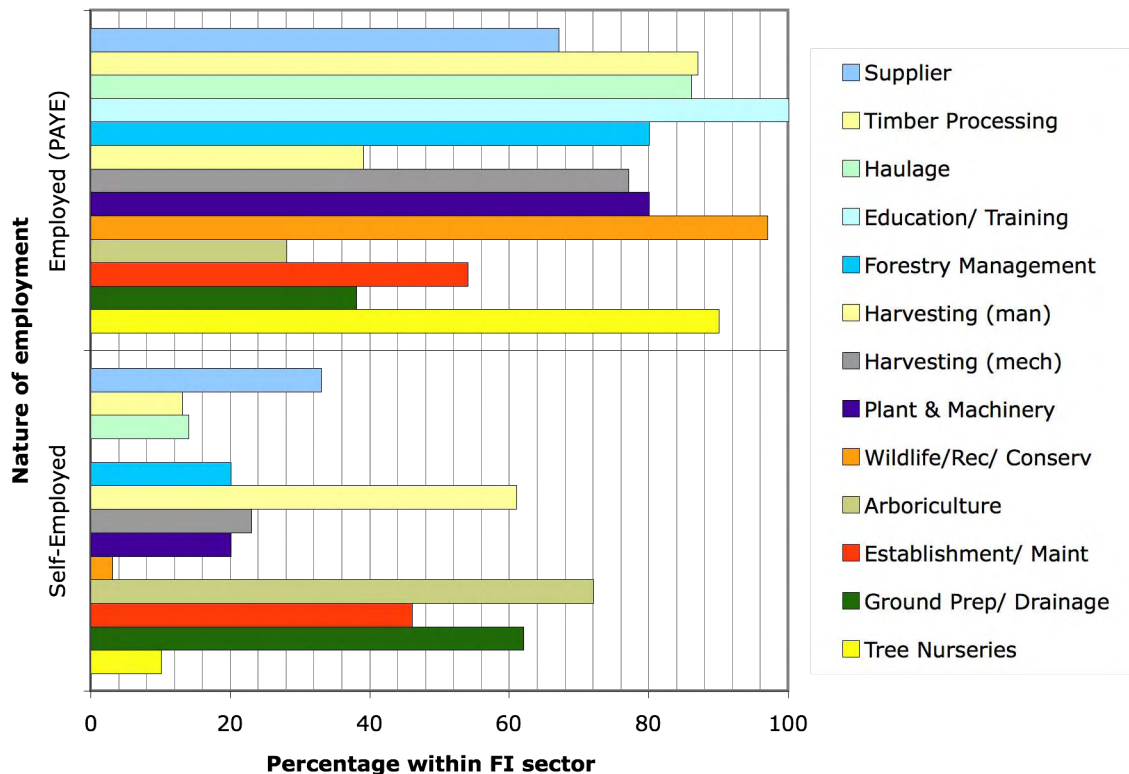
Figure 3. Nature of employment by job role



Unsurprisingly, machine operators and manual/technical workers do most of the self-employed work. Management and admin/clerical staff were much more likely to be employed than self-employed.

Differences in the nature of employment between job sectors are set out below.

Figure 4. Nature of employment by sector



Self-employment was most common within ground preparation/drainage, establishment and maintenance, arboriculture and manual harvesting. There were also more individuals who were self-employed than employed within mechanical harvesting and supplies although this difference was less marked than for the aforementioned sectors.

Employment (PAYE) was most common within tree nurseries, wildlife/recreation/conservation, education and training (employed only), haulage and timber processing. There were also more individuals who were employed than self-employed within plant and machinery and forestry management.

The interviews appear to show that, in some sectors, there is very limited employment loyalty. For example, there is frequent movement of employed and sub-contracted labour in Mechanical Harvesting "There's a lot of rubbish talked about how much people earn at other contractors so they flit about - and get disappointed."

4.2.6 Length of service

Respondents' start dates in the industry ranged from 1950 to 2006. Length of service therefore ranged from one to 56 years with an average of 21 years in service for the whole sample. There were differences between men and women where men reported double the length of service. The women had worked for an average of 11 years (range = 1-31 years) whereas the men had worked for an average of almost 22 years (range = 1-56 years).

Table 6. Average length of service by job role

Job role	Number	Min-Max	Average length of service (mean)
Management	153	1-56	24.3
Machine Operator/Technical	100	1-54	17.9
Manual Technician/Craftsman	78	1-53	21.7
Admin/Clerical	35	1-39	11.0

Reflecting the high proportion of women in Admin/clerical work, length of service at 11 years was half that of the other job roles.

Table 7. Average length of service by sector

Sector	Number	Min-Max	Average length of service
Tree nurseries	10	1-35	11.2
Ground preparation, drainage & road building maintenance	24	2-39	17.2
Establishment and Maintenance Operations	50	2-53	23.9
Arboriculture	14	1-38	17.8
Wildlife/Recreation and Conservation	36	1-39	18.3
Plant Machinery, Supply and Maintenance	5	2-31	15.6
Harvesting – mechanical	28	1-42	23.6
Harvesting – manual	12	9-49	27.6
Forestry Management	92	1-56	23.9
Education and Training	7	19-39	31.3
Haulage	30	2-44	17.7
Timber Processing	53	1-54	16.1
Supplier	5	4-36	17.8

It might be anticipated that respondents working in Education & Training would have the longest time in the Forest Industries (Ave. 31 years) but Manual Harvesting at nearly 28 years follows close behind. Forestry Management, Mechanical Harvesting and Establishment & Maintenance, all at 24 years, also have very long average service in the Forest Industries. Even the shortest, Tree Nurseries, has an average of 11 years.

4.2.7 Life Work Pattern

Length of service was calculated from respondents' start date in the industry. However the question arises what proportion of people move into and out of the industry during their work lives. Respondents were asked to describe their work as either 'continuous' (no voluntary breaks of more than 12 months), or 'intermittent'.

Table 8. Continuous or intermittent work by job role

Job role	Continuous (%)	Intermittent (%)
Management	136 (88.9%)	17 (11.1%)
Machine Operator/Technical	92 (88.5%)	12 (11.5%)
Manual Technician/Craftsman	68 (87.2%)	10 (12.8%)
Admin/Clerical	32 (91.4%)	3 (8.6%)

9 out of 10 respondents in each job role have worked continuously in forestry throughout their service.

In the interviews we learned that many management and professional jobs are now subject to short-term contracts. It was not possible to assess the long-term impact which this may have on life work patterns.

Table 9. Continuous or intermittent work by sector

Sector	Continuous (%)	Intermittent (%)
Tree nurseries	9 (90%)	1 (10%)
Ground preparation, drainage & road building maintenance	21 (87.5%)	3 (12.5%)
Establishment and Maintenance Operations	43 (86%)	7 (14%)
Arboriculture	13 (92.9%)	1 (7.1%)
Wildlife/Recreation and Conservation	33 (91.7%)	3 (8.3)
Plant Machinery, Supply and Maintenance	4 (80%)	1 (20%)
Harvesting – mechanical	25 (89.3%)	3 (10.7%)
Harvesting – manual	12 (92.3%)	1 (7.7%)
Forestry Management	86 (93.5%)	6 (6.5%)
Education and Training	4 (57.1%)	3 (42.9%)
Haulage	24 (80%)	6 (20%)
Timber Processing	49 (89.1%)	6 (10.9%)
Supplier	5 (83.3%)	1 (16.7%)

There were differences between sectors. At the extremes, two fifths of those in Education & Training had left the industry for over a year and returned whereas in Forestry Management only one twentieth had experience elsewhere. The proportion with intermittent departures from forestry is almost as low in Arboriculture and Manual Harvesting.

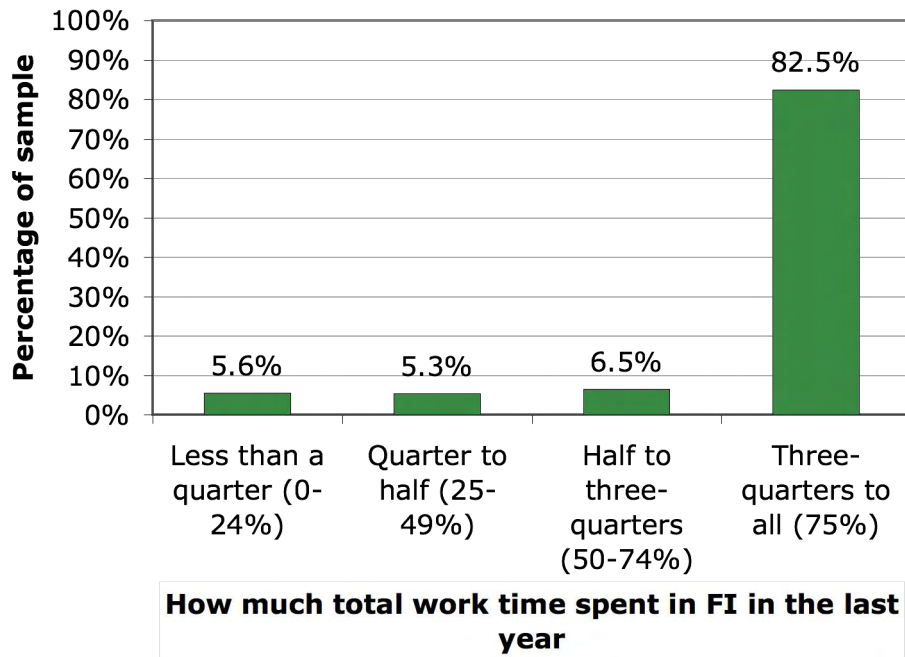
There are many fascinating stories to be told about the long and varied careers which people have had in the forest industries. We were privileged to learn something of these during the interview phase of the project. Some particularly poignant tales concerned manual harvesters who learned their trade when the chainsaw workforce was the driving force of forestry production. In those days they felt respected and admired for their skills and contribution. The work was hard but they were well paid and earned enough to enjoy some carefree socialising - "work hard, play hard". The sense of camaraderie was fondly remembered. Over the years most have left the industry, replaced by the more cost effective machines. Many 'cutters' became the drivers of these machines. Others retained their employment in forestry by learning the skills of arboriculture. However there is a small core of Manual Harvesters who have stuck with it. This aging section of the workforce has given the forest the best years of their lives. Their relative income has declined, they no longer feel respected as the skilled men of forestry and some feel demeaned at just doing the small jobs and clearing up work which they can still handle better than the big machines. The physical toll which hard manual work exacts takes away some of the pleasures which once existed.

4.2.8 Annual Work Time Pattern

To further develop the census data we asked our respondents about their working time during the last year. In order to assess the 'full-time equivalent' nature of employment in forestry we sought information about the proportion of respondents' work time which was spent in forestry as opposed to some other sector.

The proportion of work time spent in the forestry industry is shown in the bar chart below.

Figure 5. Proportion of work time spent in the Forestry Industry



The majority of the sample (82%) spent between 75-100% of their time working in the industry. Six per cent spent between half and three quarters of their time in the industry and twelve per cent spent less than half their time in the industry.

Table 10. Work time in forestry last year by job role

Job role	Less than quarter (0-24%)	Quarter to half (25-49%)	Half to three quarters (50-74%)	Three quarters to all (75-100%)
Management	11 (7.2%)	8 (5.2%)	8 (5.2%)	126 (82.4%)
Machine Operator/Technical	4 (3.8%)	5 (4.8%)	6 (5.8%)	89 (85.6%)
Manual Technician/Craftsman	6 (7.7%)	4 (5.1%)	7 (9.0%)	61 (78.2%)
Admin/Clerical	2 (5.7%)	4 (11.4%)	2 (5.7%)	27 (77.1%)

There were no significant differences by job role.

Table 11. Work time in forestry last year by sector

Sector	Less than quarter (0-24%)	Quarter to half (25-49%)	Half to three quarters (50-74%)	Three quarters to all (75-100%)
Tree nurseries	1 (10%)	1 (10%)	0 (0%)	8 (80%)
Ground preparation, drainage & road building maintenance	5 (20.8%)	1 (4.2%)	2 (8.3%)	16 (66.7%)
Establishment and Maintenance Operations	2 (4%)	6 (12%)	4 (8%)	38 (76%)
Arboriculture	1 (7.1%)	0 (0%)	3 (21.4%)	10 (71.4%)
Wildlife/Recreation and Conservation	1 (2.8%)	1 (2.8%)	1 (2.8%)	33 (91.7%)
Plant Machinery, Supply and Maintenance	0 (0%)	0 (0%)	1 (20%)	4 (80%)
Harvesting – mechanical	0 (0%)	0 (0%)	1 (3.6%)	27 (96.4)
Harvesting – manual	1 (7.7%)	1 (7.7%)	0 (0%)	11 (84.6%)
Forestry Management	5 (5.4%)	6 (6.5%)	7 (7.6%)	74 (80.4%)
Education and Training	0 (0%)	0 (0%)	2 (28.6%)	5 (71.4%)
Haulage	3 (10%)	0 (0%)	1 (3.3%)	26 (86.7%)
Timber Processing	3 (5.5%)	4 (7.3%)	1 (1.8%)	47 (85.5%)
Supplier	1 (16.7%)	1 (16.7%)	0 (0%)	4 (66.7%)

The two sectors where a difference can be identified are Ground Preparation and Supplies. A third of workers in these sectors spent time working for other industries during the year. In fact, for a quarter of workers in these sectors, forestry is a minority occupation.

We also wanted to know what proportion of the workers in the industry is not working for the whole year but rather 'occasionally/seasonally'.

Ninety-three per cent of the sample reported a 'continuous' work pattern in the industry with just seven per cent having 'occasional/seasonal' work.

Table 12. Continuous or occasional/ Seasonal work by job role

Job role	Continuous (%)	Occasional/ Seasonal (%)
Management	144 (94.1%)	9 (5.9%)
Machine Operator/Technical	97 (93.3%)	7 (6.7%)
Manual Technician/Craftsman	69 (88.5%)	9 (11.5%)
Admin/Clerical	34 (97.1%)	1 (2.9%)

Very few Admin/Clerical respondents described their work as 'occasional/seasonal' whereas over one in ten of the Manual Technician/Craftsmen work to this pattern.

Table 13. Continuous or occasional/ Seasonal work by sector

Sector	Continuous (%)	Occasional (%)
Tree nurseries	9 (90%)	1 (10%)
Ground preparation, drainage & road building maintenance	20 (83.3%)	4 (16.7%)
Establishment and Maintenance Operations	42 (84%)	8 (16%)
Arboriculture	12 (85.7%)	2 (14.3%)
Wildlife/Recreation and Conservation	34 (94.4%)	2 (5.6%)
Plant Machinery, Supply and Maintenance	4 (80%)	1 (20%)
Harvesting – mechanical	28 (100%)	0 (0%)
Harvesting – manual	12 (92.3%)	1 (7.7%)
Forestry Management	88 (95.7%)	4 (4.3%)
Education and Training	7 (100%)	0 (0%)
Haulage	29 (96.7%)	1 (3.3%)
Timber Processing	53 (96.4%)	2 (3.6%)
Supplier	6 (100%)	0 (0%)

The highest proportions (about 15%) of 'occasional/seasonal' work were reported in Ground Prep, Establishment & Maintenance, and Arboriculture.

We should note that non-full-time workers are likely to be harder to reach with a questionnaire and may be less likely to respond.

4.3 Entry into the industry

4.3.1 Routes of entry

Respondents were asked about their route of entry into the forest industry. Almost a quarter (23%) had entered through a formal academic or technical course and a further quarter (24%) had entered the industry straight from school. Half (48%) had crossed over to the forestry industry from other work.

Route of entry was compared between different job roles and results are presented in the table below.

Table 14. Route of entry by job role

	Formal course	Straight from school	Crossed over	Other
Management	50.3	20.4	25.8	3.4
Machine Operator/Technical	4.0	27.7	64.3	4.0
Manual Technician/Craftsman	5.2	35.1	64.6	5.2
Admin/Clerical	5.7	5.7	77.1	11.4

Half of the managers had entered the industry through a formal academic or technical course. A fifth had come straight from school and a fifth had crossed over from other work.

Almost two thirds of the machine operators had crossed over from other work. More than a quarter had come straight from school. Very few had entered from a formal course.

Two thirds of the manual technicians/craftsmen had crossed over from other work. Over a third had come straight from school and very few had entered from a formal course.

Three quarters of the admin/clerical staff had crossed over from other work. A minority had undertaken a formal course, come straight from school or reported some other route of entry.

Route into the forestry industry was compared between sectors.

Table 15. Route into the industry by sector

	Straight from school	After a full time course	Crossed over from another industry/ drifted in	Other
Sector	%	%	%	%
Arboriculture	38	24	38	0
Grnd prep, drnge, etc	30	4	62	4
Establishment & Mntenance	38	10	52	0
Harvesting - Mech	46	3	51	0
Harvesting - Man	47	6	47	0
Wildlife, Rec, & Conservation	32	8	52	8
Forestry Mngmnt	10	62	26	2
Educ & Trnng	0	72	28	0
Tree Nurseries	0	30	60	10
Haulage	11	4	72	13
Timber Processing	23	7	61	9
Suppliers of Materials/Services	17	17	48	17
Plant/machinery, supply & mntnce	0	40	60	0

A formal academic or technical course was the main entry route for two thirds of those respondents employed in Forestry Management and also in Education & Training. Entry straight from school was the main route for almost half of those employed in Harvesting (both mechanical and manual), and about two fifths of those in Establishment & Maintenance Operations (Manual) and Arboriculture. In all other sectors entry was mainly after working in another industry.

The interviews indicate a considerable degree of movement between sectors. For example, many of those currently working as machine operators started out in forestry as 'cutters'. This helped them to learn the principles of forestry practise and the culture of the industry - including the need for hard work and professionalism.

There were strong negative feelings about the contemporary process of college-based entry into the machine-oriented work. This was summed up by a Ground Prep. Contractor:

"When they come out of college they take a long time to become productive. With rates being so tight I can't afford to train someone up - I'd lose money and go out of business."

Another issue with the college route is the difficulty of getting used to hard work:

"Young guys just don't want to be in the seat for 11 hours. Sometimes to earn decent money you have to stay in a caravan all week - eating pot noodles and bathing in cold water."

4.3.2 Reasons for choosing the industry

Respondents were asked to select what they considered to be the most important reason for choosing their job in the forestry industry. Forty per cent considered their interest in trees and wildlife to be the most important reason. More than a fifth selected family influence or involvement and thirteen per cent chose word of mouth as being most important.

"Making things happen, getting things done. You know, felling your timber, getting it away, getting a reasonable price for it, when things are going good. It's very rewarding, it's a very rewarding industry in that you're taking something away that's grown for forty or fifty years and you're replacing it, replenishing it again. There's something solid there, something on the ground. It's something that's semi-permanent." (Forest Manager)

"It's the fact that you're responsible for what you're leaving behind. You know, it's a really strong thing. It's a strong ethic really. And when you're working with folk as well, it's a real mutual watching out for people, it's really important. You're travelling round the countryside, going in places no one's even seen before and seeing trees that no one's ever seen before, You know? Maybe your work doesn't even get noticed sometimes but, I know it sounds a bit airy-fairy what I'm saying but you know what I mean. You like to leave your mark." (Arboriculturalist Contractor)

"I think the biggest thing is freedom and the enjoyment of the countryside" (Manual Estab & Maintenance Contractor)

Comparisons between sectors are presented in below.

Table 16. Reason for choosing the job by sector

Sector	Influence of Family/Friends	Interest in trees etc	Better pay /conditions	Interest in machines	Company/ boss took on the work	Other
	%	%	%	%	%	%
Arboriculture	22	60				18
Grnd prep, drnge, etc	38	29	8	8		17
Establishment & Mntenance	48	38	6		2	6
Harvesting - Mech	35	46	8	3		8
Harvesting - Man	62	15	8			15
Wildlife, Rec, & Conservation	18	57	17			8
Forestry Mngmnt	20	60	5		3	12
Educ & Trnng		70	15			15
Tree Nurseries	30	30	20			20
Haulage	49	3	7	3	31	7
Timber Processing	50	18	10	2	2	18
Suppliers of Materials/Services	67	33				
Plant/machinery, supply & mntnce	20	40	20	20		

Interest in trees/Forests/wildlife was the largest influence (major reason for half of choices or more) on entry decisions in Forestry Management, Education & Training, Arboriculture, Mechanical Harvesting and Wildlife/Recreation & Conservation. It was important (causing about a third of choices) in Tree Nurseries, Plant & Machinery Supply & Maintenance, Ground Prep., Suppliers of Materials/Services and Establishment & Maintenance.

Friends/Word of Mouth figured large (i.e. for about a quarter of respondents) in the entry decisions in Timber Processing, Tree Nurseries, Plant & M/c Supply & Maintenance, haulage and manual harvesting.

Family influences were strongest (affecting over a quarter of choices) in Suppliers of Materials/Services, Ground Prep., Harvesting - mechanical and manual, Haulage, and Establishment & Maintenance.

4.3.3 Attracting People Into Forestry

We asked the question 'How could we encourage more people to come and work in the Forest Industry?' No choices were offered, respondents were required to write their responses.

The overwhelmingly accepted need of the forest industries to attract people has to be placed in the context of financial restraint. The report of one Forest Manager expresses the point "I would really like us to take on students and apprentices but it would not go down well with the owners - they want us to reduce staff levels." And another "Getting young people is not as difficult as getting the money to pay them."

Nevertheless 271 respondents chose to make suggestions. 6 of these were against trying to attract more people but the rest made positive proposals.

Table 17 summarises the 265 suggestions.

Table 17. Suggestions to attract more people into the industry

Suggestion	Number of people making suggestion
Improve pay and conditions	106
Get young people interested in environment, countryside and being outdoors (by targeting school & colleges)	30
More long term contracts/ job security	19
Improved practical, subsidised training	18
Increased advertising/promotion of industry	18
Increase awareness of industry and opportunities in it	16
More employment opportunities	13
Less red tape	12
More respect / appreciation	9
Provide grants/subsidies	8
Offer work experience / volunteer programmes	7
Create vibrant, profitable, stable industry	6
Government investment/ commitment to industry	3
Total privatisation of industry	3
Increase in timber price	3
Make entry into industry easier and more attractive	3
Advertise in Eastern Europe!	2

By far the largest group of proposals concern improved pay and conditions. Many responses simply state 'We need more money and less hours.' Additional factors include 'nicer contractors', 'better management', 'more stable employment', 'less red-tape'.

Some quotes from the interviews enrich the views expressed about pay

"The wages we pay are not attractive when you compare with a trade like joinery or plumbing or as an electrician. My skilled staff will be earning about £7.50 an hour – that's all they will be earning and I can't afford to pay much more than that." (Sawmill Director)

"I think that there's ways that we can encourage people to come into the industry but not as manual, because they're going to be the difficult ones to get - that's going to be the big problem; getting contractors. But with what they get paid, unfortunately, there's no encouragement for them to go into that sector of the industry." (Forest Manager)

“Crap wages, I think. Crap wages due to crap level of price of timber really. But as far as my side of things, really crap wages.” (Arboriculturalist Contractor)

“There’s not enough money, profit, in the business to give the boys what, in my opinion, they deserve.” (Haulage Co. Director)

The other main group of suggestions focused on promotion of the opportunities for an outdoor/countryside/environment related lifestyle to young people.

‘We need to get young people interested in the environment and used to being outdoors doing physical work. Offer apprenticeships in suitably located towns/schools/colleges.’

Many of these suggestions also focus on taking the Forest Industry into schools:

‘Get out to schools and talk about the countryside, not just trees, the whole environment including plants and wildlife.’

‘Close liaisons with schools on environmental projects. Encourage youngsters to get involved in forestry related activities.’

There is a feeling that the attitude of teachers is not helpful:

‘Careers guidance would probably discourage them from working in forestry. I’m sure they would be told, “You’ve got better brains than that.”’

Similar suggestions involved promotion of the forest industry to the public at large. ’

‘Create workshops and roadshows using films and photos to show people what it’s like to work in the forests, in all seasons.’

‘We should be more proactive in publicising the importance of managing our forests.’

Another large group of ideas involved thinking creatively about training schemes.

Attitudes to training, as they emerged in the interviews, will be discussed in Section 5 but it has to be significant that this area is so high on the list of suggestions. There is clearly a perception that the existing training provision does not optimally facilitate entry into some forestry sectors. In particular, there is a gap between college certification and professional skill which is difficult to bridge. There is also a cynicism about college-based training which may mean that ‘on the job’ approaches should be explored.

‘Give people the opportunity to get work experience onsite. You could get a sawmill and an estate management company together and arrange a look at the variety on offer.’

‘Encourage modern apprenticeships and have them paid for.’

‘Get people to try it, ‘have a go schemes’, job shadowing.’

‘Need a training process for forest establishment contractors and their employees.’
‘Too many people study forestry but don’t do it. Attract them into on the job training.’

Many of the responses suggested seeking ways to address the short-term and insecure nature of much forest employment.

‘You’ve got to find a way to make more stable, paying jobs available.’

‘We need longer contracts and permanent employment opportunities.’

‘Stop contracting out so many jobs. It may be cheaper but people aren’t attracted when they see there’s no security. We need career paths.’

‘The forest industry needs a career structure with full-time quality jobs.’

The poor image of the industry in general and lack of respect and appreciation from the public is also an issue that needs to be addressed:

“At schools I would think that the careers guidance would discourage them from coming here. I am sure they would be told, “You’ve got better brains than that”.”
(Sawmill Director)

The other main suggestion was around promotion of the lifestyle and opportunities to young people and to the sustainability and importance of working in the countryside. However, many people pointed out that young people now prefer indoor office jobs and more glamorous professions:

“I can’t even picture young guys at school wanting to do a job like this. There will be the odd one, don’t get me wrong. My boy would probably jump at a chance to do this but I think my wife would be upset if he was to tell her “I want to cut wood Mum”. Don’t get me wrong though. He has been out – he’s seen the job and he’s held the saw and cut logs but I’ve said to him that he should stick at the school and try to get himself a job ”
(Manual Harvester)

“There’s a lot of people come and have a go in the machines and say ‘god I could do this’ and then when they start doing it every day, 10, 12 hours a day, they say ‘no, I don’t like this anymore’.” (Mechanical Preparation Contractor)

“If they haven’t got a background or father or an uncle or whatever with a background in machine operation or some sort of connection with the countryside and woodland, they don’t seem to get pulled in that direction. If they slip past the 16, 17, 18, it’s too late for them. They need that couple of years to really dig in and learn.” (Machinery supplier)

“I think that the area, the country, Britain, is not in a position to do that manual sort of work anymore. All the youngsters coming through, everyone wants to sit in front of a computer. Manual jobs like your brickies, your plumbers, your joiners, your lorry drivers, your tractor drivers, no one wants to do that anymore. It’s turned on its head. The culture is different. Nowadays it’s “I want to be a pop star”.” (Haulage Co. Director)

“Imported labour is coming. It’s got to come. They’re not going to get them in this country to do it.” (Manual Estab & Maintenance Contractor)

It has to be pointed out that in some sectors there are few problems attracting people. Particularly this appears to be true in Wildlife and Recreation Management. There are still relatively few jobs compared to the pool of experienced people and also college graduates becoming available. For some posts college graduates find it necessary to show commitment and gain experience through voluntary work before they have any chance of being appointed.

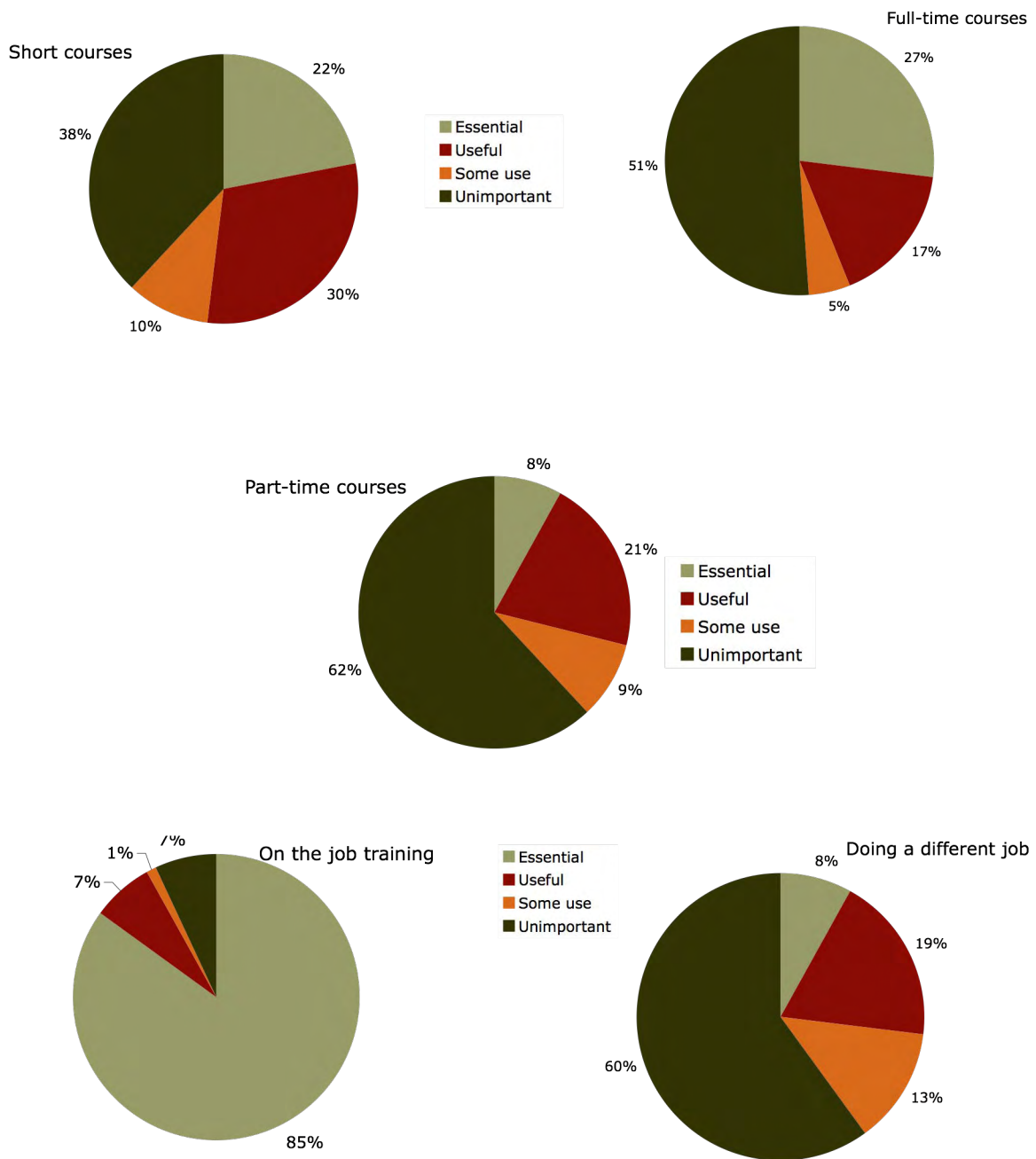
4.4 Learning the job

The subject of training and development in forestry has been exhaustively studied elsewhere. We can add to earlier studies with information about how our respondents learned to do their current jobs and their intentions about further training in the near future.

4.4.1 Learning to date

Respondents were asked how they learned to do their job and asked to indicate the level of importance of: short courses, full-time courses, part-time courses, learning on the job and doing a different job.

Figure 6. Learning to do the job



An overwhelming majority felt that learning on the job was essential (86%). Less than seven per cent felt that learning on the job was not important for them.

“You end up working with people who are a lot better than you ‘cause there’s always some old guys who used to work in the woods who are absolutely brilliant. Then you just keep your mouth shut and watch them and listen to them and you learn a hell of a lot.” (Arboriculturalist Contractor)

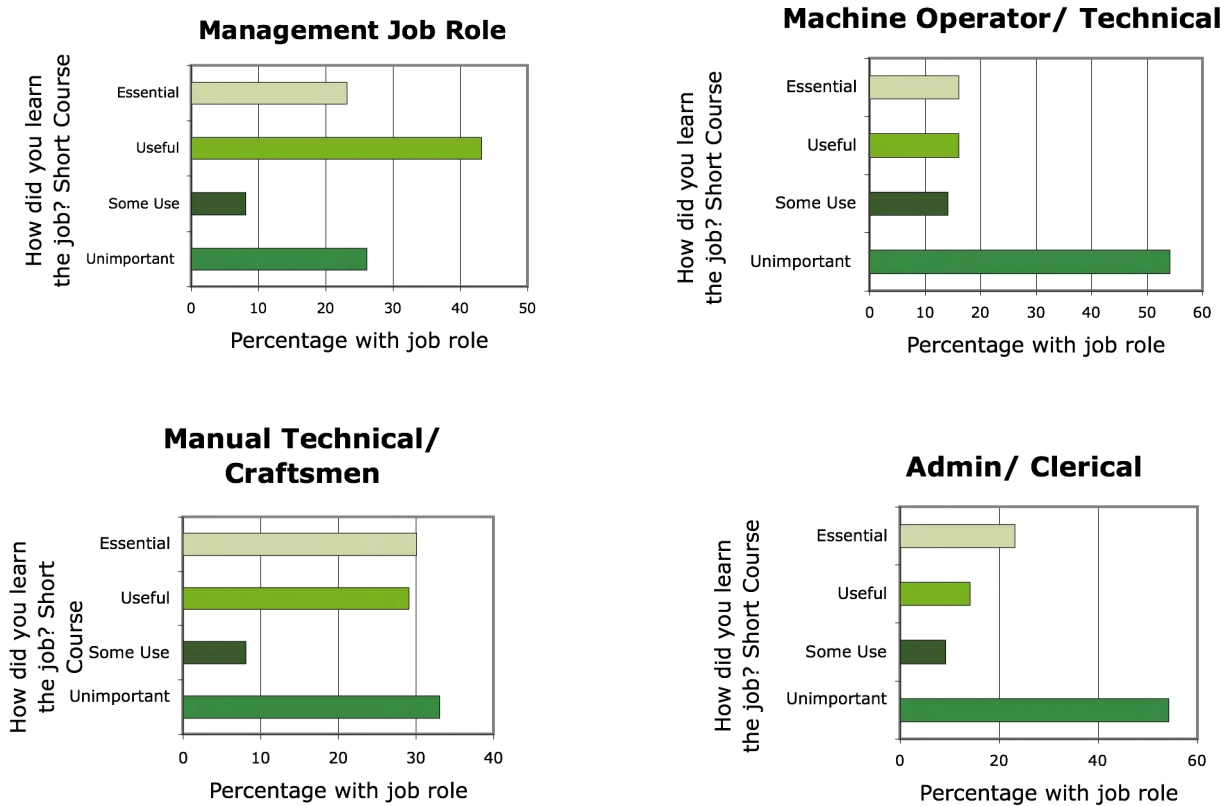
“The best way of learning things quickly is by working with somebody that knows more than you do.” (Arboriculturalist Contractor)

Just over a quarter thought that full time courses were essential and almost 22% thought that they were useful or of some use. Over half thought that full time courses were not important.

Just over a fifth thought that short courses were essential in learning how to do the job. Forty per cent thought they were useful or some use. Thirty-eight per cent thought that short courses were not important.

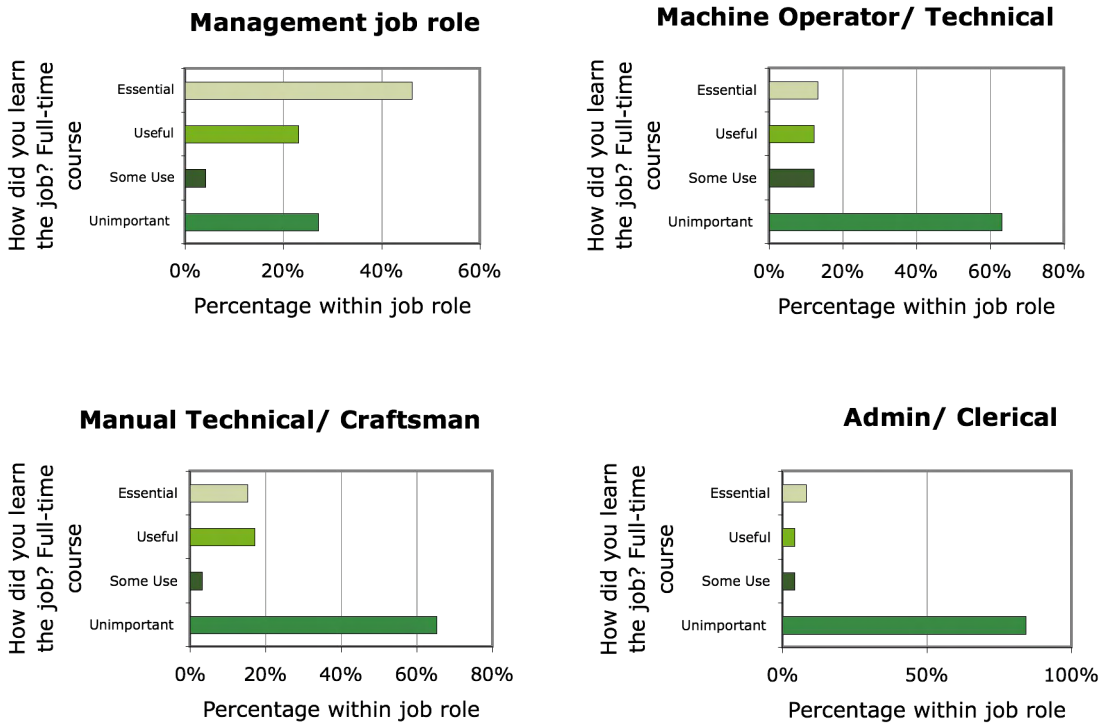
Method of learning to do the job was compared across job roles. Results are presented in the charts below.

Figure 7. Learning to do the job by short course



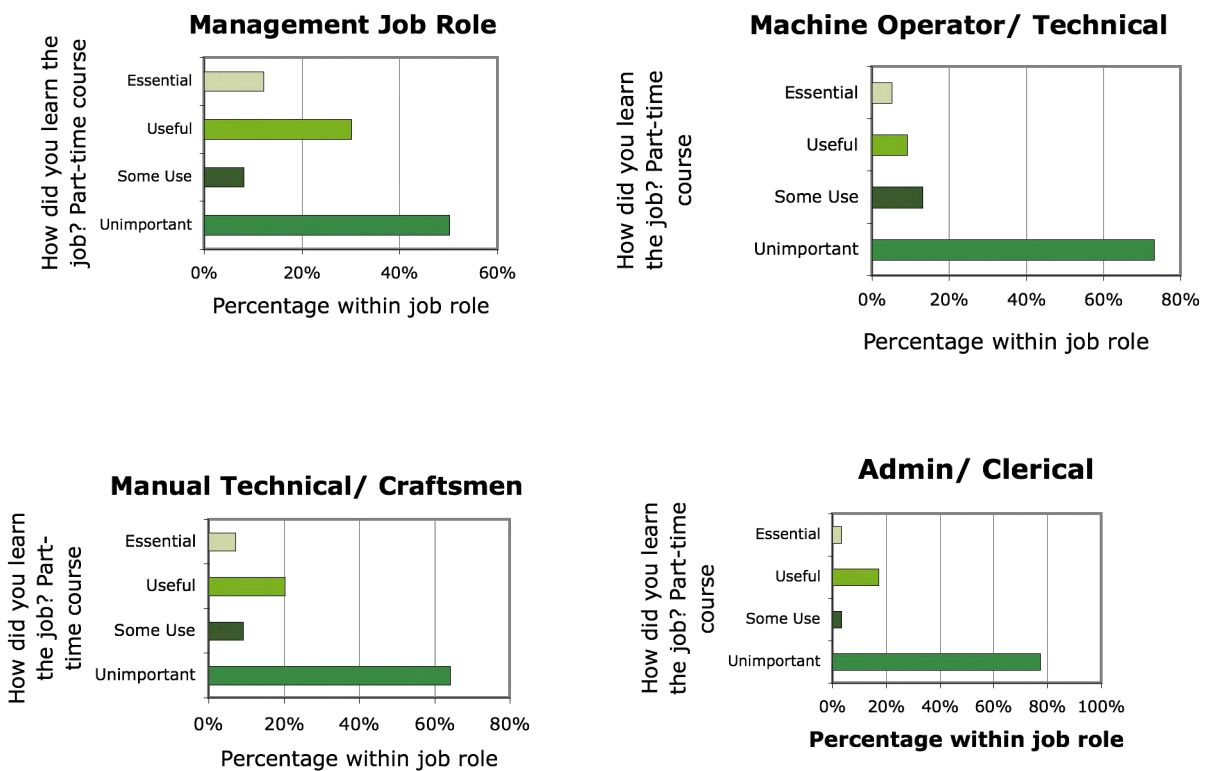
Managers and manual technician/craftsmen in particular feel that short courses have been very helpful in their learning.

Figure 8. Learning to do the job by full time course



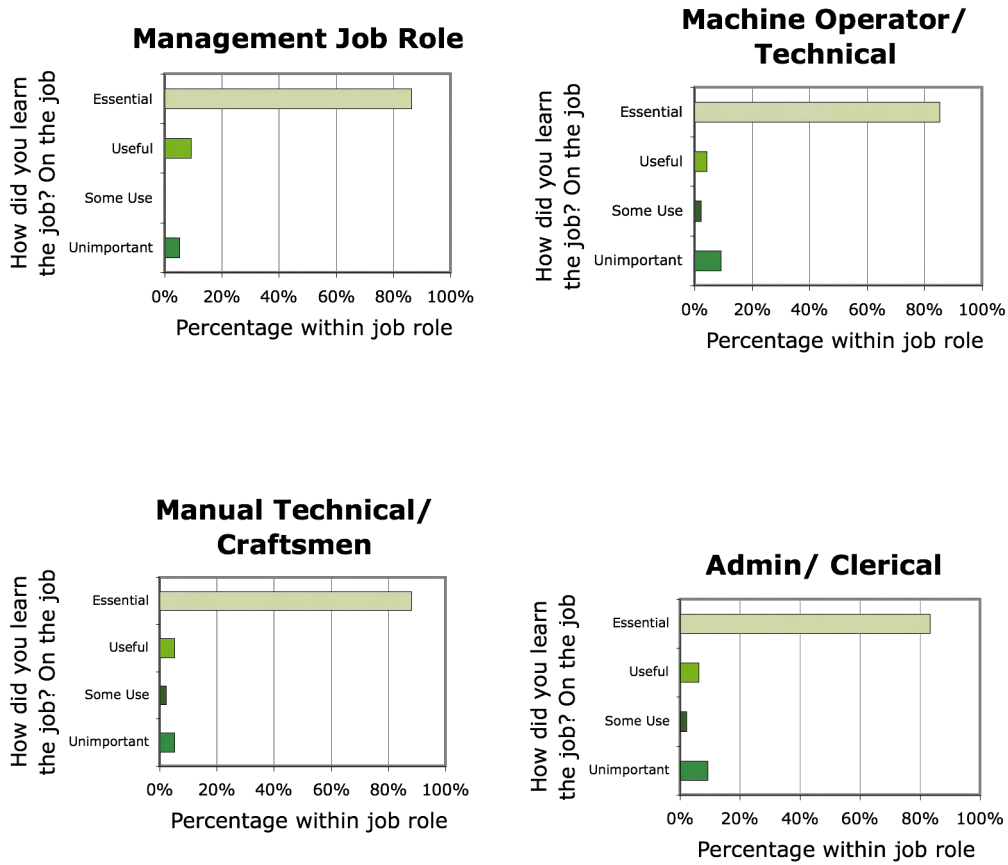
Only managers give any weight to the usefulness of full time courses.

Figure 9. Learning to do the job by part time course



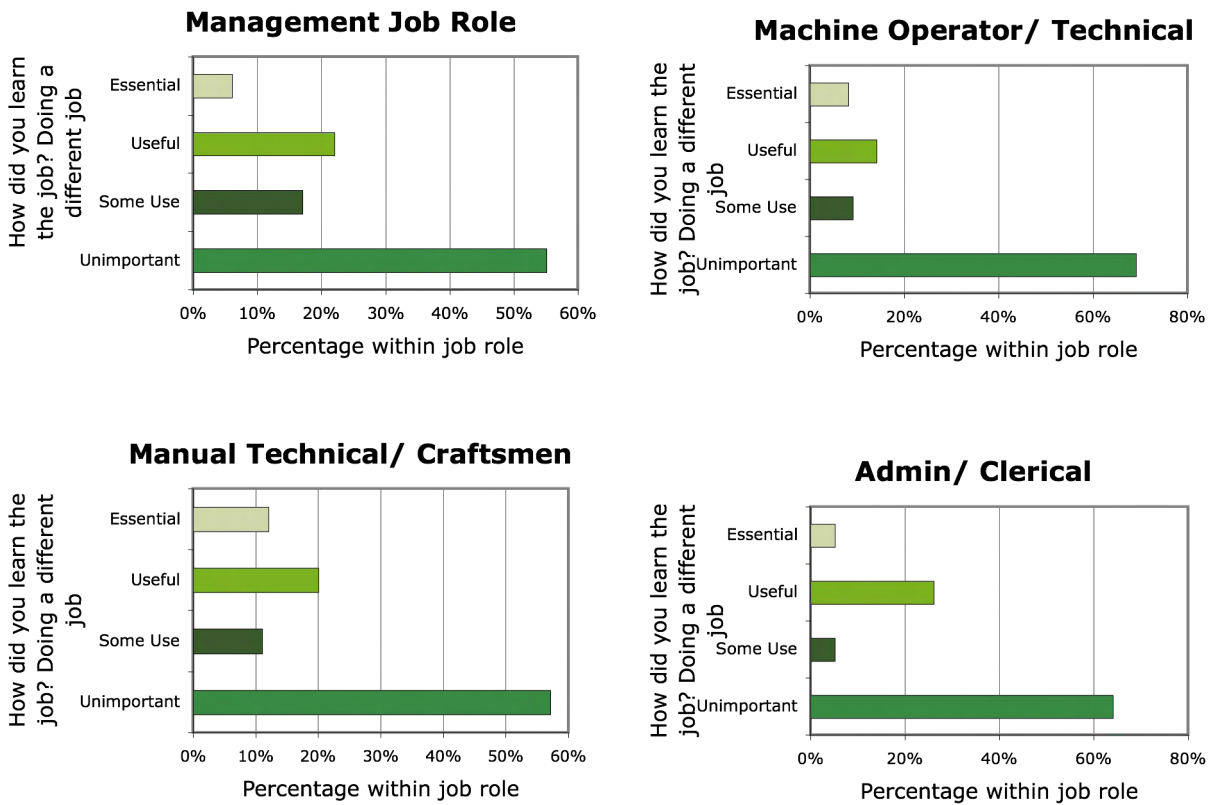
A significant minority (two fifths) of managers have found part time courses useful but few others.

Figure 10. 'On the job' learning



All job roles feel that 'on the job' learning has been an essential mechanism.

Figure 11. Learning by doing a different job

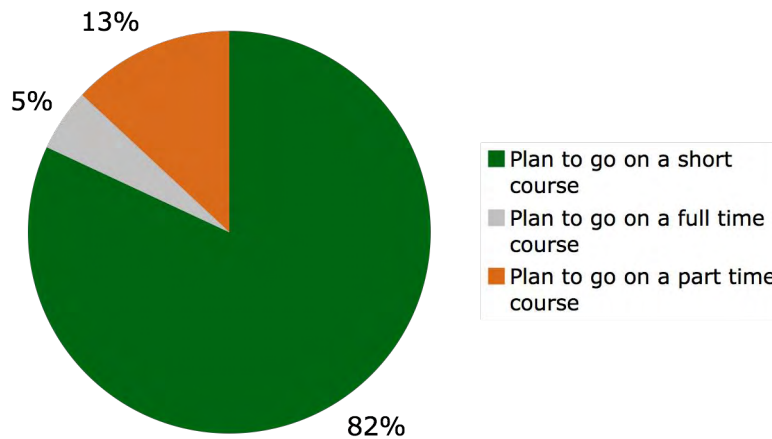


The transfer of learning from other jobs has not been very important in any of the job roles.

4.4.2 Future learning

Over half the sample (55%) reported that they planned to do some form of training within the next two years. For those who planned training, short courses were most commonly selected, followed by part time courses with full time courses being the least popular.

Figure 12. Training intentions of respondents



Intentions towards further training were compared between job roles.

Table 18. Intentions towards further training by job role

Job role	No (%)	Yes (%)
Management	27.5	72.5
Machine Operator/Technical	64.4	35.6
Manual Technician/Craftsman	47.4	52.6
Admin/Clerical	54.3	45.7

Most training is planned by managers though about half of manual technicians/craftsmen and Admin/clerical staff also anticipate some form of development. This falls to a third for machine operators.

4.4.3 Attitudes To Training

In the interviews we obtained some important insights about how training is perceived by our particular interviewees in their various forestry sectors.

Universally negative views were expressed by those whose jobs require them to acquire a collection of 'tickets' in order to operate legally. These are seen as providing limited skills which might lead to an individual believing they are capable of taking on a demanding job.

"You come across people who have just left college and think they can set themselves up in business with no experience. They are a danger! The tickets were supposed to stop cowboys but actually it encourages them - they think it means they are competent when they aren't" (Arboriculturist)

Training can also be a major expense for individuals wishing to add to their existing skills or transfer into a new area.

"Who can afford the time and cost to go to college? And then you still might not take to working with the machines." (Manual Harvester)

More surprisingly, employers in the same sectors were also unhappy.

"The set-piece nature of the practical training means they just aren't ready to take on difficult conditions and rough weather." (Mech. Harvester)

It should be noted that strong negative views about training were mainly expressed in sectors in which there are major competitive pressures making it hard to achieve profitability.

"There is just no 'fat' in a contract for an employer to absorb the inefficiency of someone fresh out of college" (Mech Harvester)

There appears to be a perception by those who are under extreme business pressure that there is an alliance between training institutions and legislators to extract fees from those working at the sharp end who are already hard pressed. Some ways round this were discussed:

"If someone doesn't need a ticket for their first six months in work, they can just move, or be moved, when they're likely to be checked." (Mech Harvester)

Much more positive views were expressed in situations where the respondents are not subject to financial pressure.

"When someone comes to me with a Level 1 Deer Management qualification at least I know he is safe and knows the basics." (Stalker with Deer Commission)

4.5 Work Motivation and Satisfaction

Herzberg's 'Hygiene' theory of work motivation is well known. He suggests that there are 'Motivators' which lead people to put effort into their work. His list comprises 'Achievement/Recognition/Work Itself/Responsibility/Advancement'. He proposes that it is these on which employers should focus to improve performance. Herzberg's second set of factors, 'Dissatisfiers', comprise 'Company Policy/Supervision/Relationship with the Boss/ Work Conditions/ Salary/Peer Relationships.' He sees it as important to get these 'Hygiene Factors' right in order to prevent dissatisfaction. He proposes that putting more resources into them may prevent people leaving but will not have much impact on their motivation to work hard.

Herzberg's methodology relied primarily on interviews and he looked at very different industries so the comparison with our data is by no means perfect. Nevertheless it is interesting to keep it in mind when reviewing the findings.

4.5.1 Best things about working in the industry

We asked - 'What are the best things about your work in forestry?' The list of options was based on the interviews and we allowed respondents two choices from it. Our idea was to identify the 'motivators' which provide people in the industry with their primary work drives and satisfactions, their reasons for getting up in the morning and starting the day with energy and enthusiasm. Herzberg would suggest that getting more out of people requires focus on these factors.

Table 19. Best things about the job

	Number of respondents (who selected the item)	Percentage
Being outdoors/in the countryside	178	48.1
Variety of work	140	37.8
Freedom/Being my own boss	104	28.1
Enjoying the challenges	73	19.7
Benefiting the environment	59	15.9
The people	53	14.3
Work being appreciated	43	11.6
Feeling part of the changing landscape	37	10.0
Seeing new places	23	6.2
Opportunities to progress	17	4.6
Pay/rewards	17	4.6

In this table items are ranked according to their popularity. (Note that since each individual had two votes the percentage figures add up to 200).

The overall results combine an enormous range of job types and sectors yet there is still a clear pattern. People draw great satisfaction from their involvement with the countryside. For many, forestry also provides an interesting variety of challenges and a feeling of freedom, often derived from being your own boss. At the other end of the scale, factors which would figure large in the career choices of many youngsters - 'opportunities to progress' and 'pay/rewards' were not highlighted as motivational considerations. The responses on 'Pay/Rewards' are interesting - bottom of the list in terms of 'Best Things About The Industry'.

We examined differences between job roles.

Table 20. Best things about the job by job role

	Management	Machine Op/ Technical	Manual tech/ Craftsman	Admin/ Clerical
	%	%	%	%
Being outdoors/in the countryside	46	53	60	17
Variety of work	41	23	41	60
Freedom/Being my own boss	28	27	37	11
Enjoying the challenges	22	25	8	20
Benefiting the environment	22	8	17	11
The people	11	15	13	31
Work being appreciated	3	14	12	40
Feeling part of the changing landscape	14	3	13	6
Seeing new places	4	11	6	3
Opportunities to progress	3	9	5	0
Pay/rewards	1	8	6	9

There were just a few key differences between job types. Admin/Clerical staff, unsurprisingly, did not rate 'Being Outdoors' as high as those in other job categories. They were more concerned with 'Variety of Work' and 'Work Being Appreciated'. Managers and Manual/Tech Craftsmen were much more likely to be positive about 'Benefiting the Environment' than other workers.

Some further differences emerge when we look at the rankings by Sector.

Table 21. Best things about the job by sector

	Tree nurseries	Ground prep	Estab/Maint	Arboriculture	Wild/ Rec/ Cons	Plant & Mach	Harvest– Mech	Harvest - Man	Forestry Mgt	Educ/train	Haulage	Timber Proc	Supplies
	%	%	%	%	%	%	%	%	%	%	%	%	%
Being outdoors/in the countryside	50	42	78	50	53	40	68	46	41	14	50	27	33
Variety of work	50	25	40	21	50	60	14	39	47	71	26	34	16
Freedom/Being my own boss	20	33	36	43	22	0	39	85	25	29	20	15	17
Enjoying the challenges	20	21	4	21	14	20	32	15	19	29	23	29	33
Benefiting the environment	20	25	14	14	22	40	11	23	26	0	0	4	0
The people	30	4	8	7	14	0	4	15	9	29	17	31	33
Work being appreciated	10	8	6	29	17	40	4	15	12	29	10	15	0
Feeling part of the changing landscape	0	17	22	0	11	0	0	8	14	29	0	0	33
Seeing new places	0	8	6	7	0	0	11	39	2	0	20	0	33
Opportunities to progress	0	8	0	0	3	0	0	8	0	0	7	20	0
Pay/rewards	10	4	2	7	3	0	7	8	1	0	3	13	0

The Education Sector derives much less satisfaction from 'Being in the Countryside' than the other Sectors this is not as surprising as the low ranking on this dimension by Establishment/Maintenance. 'Benefiting the Environment' is ranked particularly low by those employed in Haulage, Timber Processing and, interestingly, Education & Training.

Tables 20 and 21 demonstrate a remarkable similarity of motivating factors throughout the forest industries. The obvious place to look in order to motivate forestry workers is at the factors low down the list.

4.5.2 Worst things about working in the industry

We asked - 'What are the worst things about your work in forestry?' Herzberg would hypothesise that the responses provide information about 'Hygiene Factors' which, if positive, can prevent dissatisfaction but however good they are they are unlikely to lead to great satisfaction. He suggests that, if they are bad enough to outweigh the positive motivations, these factors will result in people looking for work elsewhere.

Table 22. Worst things about the job

	Number of respondents (who selected the item)	Percentage
Paperwork/red tape	173	46.8
Bad Mngmnt / Other people doing a bad job	134	36.2
Insufficient pay	95	25.7
Weather	75	20.3
Antisocial/long hours	62	16.8
Income insecurity	52	14.1
Lack of appreciation	42	11.4
Lack of opportunities	40	10.8
Health and Safety risks	36	9.7
Physical demands	24	6.5

Almost half the respondents gave 'Paperwork/Red Tape' one of their two votes for 'worst things about the job'. Over a third selected 'Bad Management/ Other People Doing a Bad Job'. A quarter selected 'Insufficient Pay' and 'The Weather' was close behind!

In the tables and discussion in this section 'Bad Management' and 'Other People Doing A Bad Job' have been combined. We have assumed that it is a management responsibility to control the quality of work of others.

We looked for differences between those doing different job roles

Table 23. Worst things about the job by job role

	Management	Machine Op/ Technical	Manual tech/ Craftsman	Admin/ Clerical
	%	%	%	%
Paperwork/red tape	67	29	32	43
Bad Management/ Other people doing a bad job	27	38	39	63
Insufficient pay	16	37	33	17
Weather	11	29	32	9
Antisocial/long hours	14	22	14	17
Income insecurity	12	13	21	14
Lack of appreciation	9	15	10	14
Lack of opportunities	7	13	10	26
Health & Safety risks	7	16	8	9
Physical demands	3	9	12	6

Paperwork/Red Tape came top overall. However, for all job roles except management, 'Bad Management/ Other people doing a bad job' is top of the list.

High on everybody's list, but particularly for Machine Operators and Manual Technical/Craftsmen, is 'Insufficient Pay'. Lack of opportunities is a particular issue with the Admin/Clerical sector.

We also looked for differences between sectors.

Table 24. Worst things about the job by sector

	Tree nurseries	Ground prep	Estab/Maint	Arboriculture	Wild/Rec/Cons	Plant & Mach	Harvest- Mech	Harvest - Man	Forestry Mgt	Educ/train	Haulage	Timber Proc	Suppliers
	%	%	%	%	%	%	%	%	%	%	%	%	%
Paperwork/red tape	30	46	26	43	50	40	39	54	72	71	47	27	33
Bad management/ Other people doing a bad job	10	46	28	64	25	20	38	39	29	72	50	48	33
Insufficient pay	0	33	40	7	22	20	18	46	16	0	23	44	17
Weather	20	13	38	7	11	40	21	39	9	0	43	22	33
Antisocial/long hours	20	21	0	7	31	20	32	0	10	0	30	24	50
Income insecurity	30	17	24	29	8	0	14	8	13	14	7	11	0
Lack of appreciation	0	8	8	14	11	0	14	15	10	14	13	18	0
Lack of opportunities	20	13	10	7	8	20	7	8	10	29	13	11	17
Health & Safety Risks	10	4	12	0	3	20	18	8	3	0	17	22	0
Physical demands	0	0	14	7	6	20	0	23	1	0	10	11	0

This view of the data shows that whilst 'Paperwork/Red Tape' is universally a cause of dissatisfaction it affects far more strongly those in Forestry Management and Education & Training. 'Bad Management/Other People Doing A Bad Job' is a negative factor for most sectors. Resentment of 'Insufficient Pay' is far stronger in Manual Harvesting, Establishment & Maintenance, and Timber Processing than elsewhere, though it is still high in Ground Preparation. There is concern about 'Income Insecurity' rather than low pay in Arboriculture and Tree Nurseries.

Tables 23 and 24 indicate that in all areas of Forestry there appears to be resentment about form filling, record keeping, regulation, and all that creates paperwork and red tape. It is hard to tell whether, deep down, this is accepted as simply an unavoidable aspect of modern work life or whether people really believe some improvements can be made. The interviews allowed us to take a closer look, focusing particularly on the sectors in which negative feelings are highest.

The high score in Wildlife/Recreation Management did not appear to reflect a high level of resentment. "In the early days the paperwork would have been done by a secretary. Now I have to do it myself but in fairness it's not too onerous." (Stalker with Deer Commission) "The paperwork is a pain but it is necessary - much of it is to protect us so I don't have a problem with it." (Community Ranger)

A view receiving sympathy across the 'production' sectors is expressed by an Ex-Mechanical Harvester now in Arboriculture "Too much of the paperwork, risk assessments and the like, is them covering their arses for insurance purposes. It's so they can blame us if anything goes wrong."

The huge issue of pay, particularly in those sectors closest to the forest, needs to be addressed. The first steps are to find out what individuals actually take home, what is the real profitability of businesses and also to understand the pricing mechanisms for work given to contractors.

The interviews enable us to expand on these issues.

The combined 'Other People Doing A Bad Job' and 'Bad Management' figure demonstrates a high level of dissatisfaction with management and quality control across most sectors. The nature of management failings varies across the sectors as the interviews have revealed.

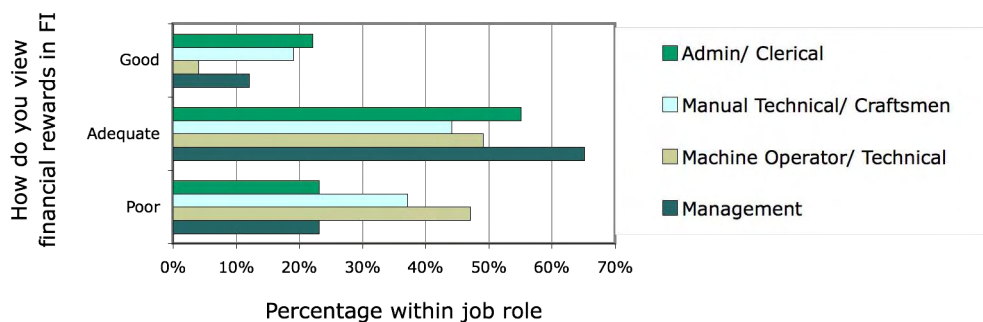
"I don't think the managers in my sector are too bad - they tend to enjoy their work and want to help you if they can. Most of them come from an operational background so they're having to catch up with me." (Community Ranger)

4.5.3 Current Financial rewards

Respondents were asked how they viewed their financial rewards. Only 12.5% perceived them as good, almost half reported that they were adequate, and almost a third reported that they were poor.

Differences by job role are shown in the figure below.

Figure 13. Views towards financial reward by job role



There were mixed responses but on the whole, machine operators and technical staff were most likely to view their financial rewards as poor. Manual technicians and craftsmen were more likely to report that rewards were adequate or poor than good. Admin and clerical staff were more likely to have positive views towards financial rewards. Management were more likely to view their pay as adequate or good than poor.

"If I was only interested in finance I would sell up tomorrow and invest the money and make a lot more outside the industry." (Sawmill Director)

"Everybody wants to make a profit but I think it's the people with the machines in the wood that suffer. The contractors and the guys they employ. I don't think the contractors are being that greedy. I know what I get offered and it's crap compared to what it used to be" (Mech Harv Contractor)

Views towards financial reward were then compared within each job sector:

Figure 14. Views towards financial reward by job sector

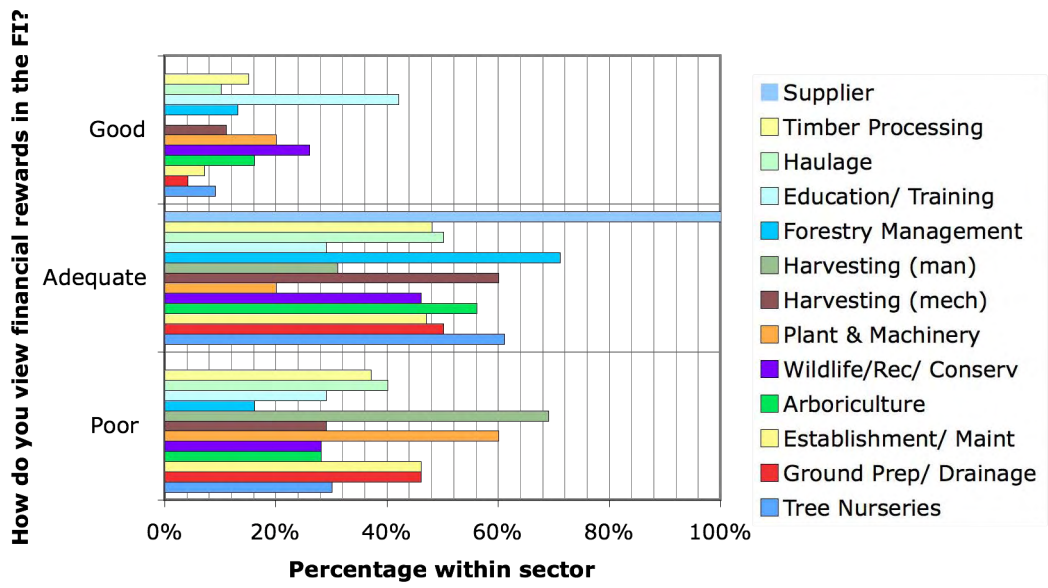


Table 25. Views about financial rewards

Job Sector	Good (%)	Adequate (%)	Poor (%)	'Score'	Rank (Most +ve= 1)
Tree nurseries	10	60	30	-0.2	7
Ground preparation, drainage & road building maintenance	4	50	46	-0.43	12
Establishment and Maintenance Operations	6	48	46	-0.41	10=
Arboriculture	14	57	29	-0.17	5
Wildlife/Recreation and Conservation	25	4	28	-0.03	3
Plant Machinery, Supply and Maintenance	20	20	60	-0.41	10=
Harvesting – mechanical	11	61	28	-0.19	6
Harvesting – manual	0	31	69	-0.71	13
Forestry Management	13	71	16	-0.04	4
Education and Training	42	29	29	+0.14	1
Haulage	10	50	40	-0.30	9
Timber Processing	15	48	37	-0.22	8
Supplier of Materials/Services	0	100	0	0	2

The last two columns represent an attempt to score then rank sector responses. Scoring was 1 point for 'Good', 0 points for 'Adequate' and +1 point for 'Poor'. The total score for each sector was divided by the number of respondents in each sector to get an average score. The colours highlight the most positive responses (green) and the most negative (pink).

By sector, wildlife and recreation/ education and training sectors produced more responses suggesting that financial rewards were good. Poor pay was more likely to be reported by those in ground prep/drainage, establishment and maintenance operations, plant and machinery, harvesting (particularly manual) and haulage.

“When you think that everything else is going up and the price you’re getting is going down. And your wages are going up. And that’s what everybody’s fighting against. And this is where we’re struggling to keep the contractors paid. The money’s not there. Everybody’s on such a tight margin that the forest owners and growers, they can’t afford to be paying these guys a good wage” (Forest Manager)

“Sometimes you feel as if you are banging your head against a brick wall and you’re earning the same as you were 10 years ago and things aren’t getting any better.”
(Manual Harvester)

“Most people that own the machines lease the machine to the operator at £1 a week so that he’s self-employed and get paid on a production basis . They do work long hours for that money though. I suppose if you look at it on an hourly rate it’s not quite as good-looking” (Sawmill Director)

Views about financial rewards were compared between respondents who were employed (PAYE) and self-employed. These are presented in the table below.

Table 26. Views about financial rewards by nature of employment

Views	Employed (%)	Self-Employed (%)
Good	15.2	5.1
Adequate	57.0	49.0
Poor	27.8	45.9

Self-employed respondents were much more likely to report that rewards were poor and employed respondents were three times as likely to report that rewards were good.

4.5.4 Expected changes in financial rewards

When asked how they would expect these rewards to change within the next two years, more than half expected that they would stay the same (56%), with just under a third expecting an increase (31%) and almost 13% expecting a decrease in reward.

Expectation of a change in financial reward was compared between job roles:

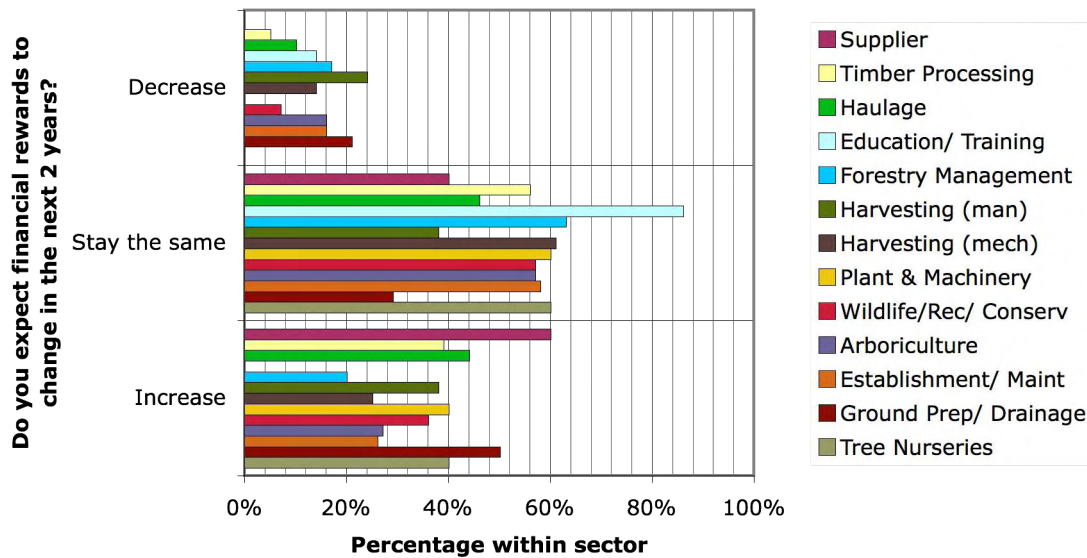
Figure 15. Expectations of reward change by job role



Management were more likely to expect that pay would decrease or stay the same and less likely to expect an increase in pay. Machine operators and technical were more likely to expect that pay would increase. Responses from manual technicians and craftsmen were mixed. Admin and clerical were marginally more likely to expect a pay increase.

Expectations of a change in financial reward were then compared between job sectors.

Figure 16. Expectations of reward change by sector



Again, responses were mixed. A decrease in financial reward was more often expected by individuals in the establishment and maintenance, manual and mechanical harvesting and forestry management sectors. An increase in financial reward was more often expected within tree nurseries, wildlife/recreation/conservation, plant and machinery, haulage, timber processing and supplies.

Expectation of reward change was compared between those who were employed (PAYE) and those who were self-employed:

Table 27. Expectation of reward change by nature of employment

Views	Employed (%)	Self-Employed (%)
Increase	32.6	28.1
Decrease	9.6	20.8
Stay the Same	57.8	51.0

The main feature of this table is that more than twice as many respondents in the self-employed category anticipate a decrease in reward.

4.6 Potential For Departure

It is a key policy concern for an industry if a large proportion of those employed in it are about to leave. This is an area on which three questions in this survey shed some light.

4.6.1 Intentions To Depart

We asked whether people expect to be in the Forestry Industry in 5 years time. About one fifth (18.5%) expect to leave within 5 years.

Table 28. Expectations of departure within 5 years by job role

Job role	% Expecting To Leave
Management	13.6
Machine Operator/Technical	19.0
Manual Technician/Craftsman	25.3
Admin/Clerical	22.9

Over a quarter of Manual Technicians/Craftsmen expect to leave; this is nearly twice the proportion of Management staff. The proportion of Admin/Clerical staff intending to leave is almost as high though it may be hypothesised that turnover in this type of job is probably greater due to easier transfer of skills across industries.

We also analysed the responses by sector.

Table 29. Expectations of departure within 5 years by sector

Sector	% Expecting To Leave
Tree nurseries	40.0
Ground preparation, drainage & road building maintenance	20.8
Establishment and Maintenance Operations	26.0
Arboriculture	23.1
Wildlife/Recreation and Conservation	12.1
Plant Machinery, Supply and Maintenance	40.0
Harvesting – mechanical	21.4
Harvesting – manual	30.8
Forestry Management	9.0
Education and Training	14.3
Haulage	17.2
Timber Processing	17.6
Supplier of Materials/Services	40.0

Sectors in which intentions to leave are highest are Plant Machinery, Supply & Maintenance, Suppliers of Materials/Services and Tree Nurseries. In these sectors two-fifths of existing staff intend to be away within five years. Over a quarter expect to have left in Manual Harvesting, Establishment & Maintenance, and Arboriculture. This falls to a fifth of staff for Mechanical Harvesting and Ground Preparation.

4.6.2 Reasons For Leaving

We asked those intending to leave for their reasons. Respondents were not offered choices; they were required to write their responses.

As we would expect given the age structure of the industry, the main reason given was Retirement (43%). 10% of Managers expect to retire within 5 years, 5% of the Machine Operators, 10% of the Manual Technicians and 17% of Admin Workers.

9% of those intending to leave expressed a positive need for a change, most in pursuit of career progress.

The rest had a range of negative reasons, the largest being low earnings (16%). 'I think about leaving every year because I make a loss every year. We just don't get paid sufficient and it pulls you down.' (Manual felling and extraction). 'Poor wages for the responsibility, the long antisocial

hours and repetitive, monotonous work.' (Plant Operator) 'For more wages leading to a better quality of life.' (Forestry Foreman)

The other large set of reasons (15%) was really a mix of dissatisfactions. 'Bad management, no prospects, no training except for your current job, salary capped, no youngsters taken on.' (Forest Craftsman). 'Pains after years of work on rough ground in all weathers.' (Forest Ranger). 'Timber Contractors treated appallingly, poor rates, no continuity of work, continual playing one against the other.' (Timber Harvesting)

We interviewed one ex-manual/mechanical harvester in his late twenties who has completed a 6-month full-time forestry course at college. He loved the outdoor and practical nature of forestry work and hopes to return to it one day. However the poor pay in manual harvesting and the long and antisocial hours in mechanical harvesting have resulted in him taking a well-paid job in retailing, which "means I can have a family life". He feels that "The work-life balance which many forestry jobs offer is out of kilter with what young people expect these days."

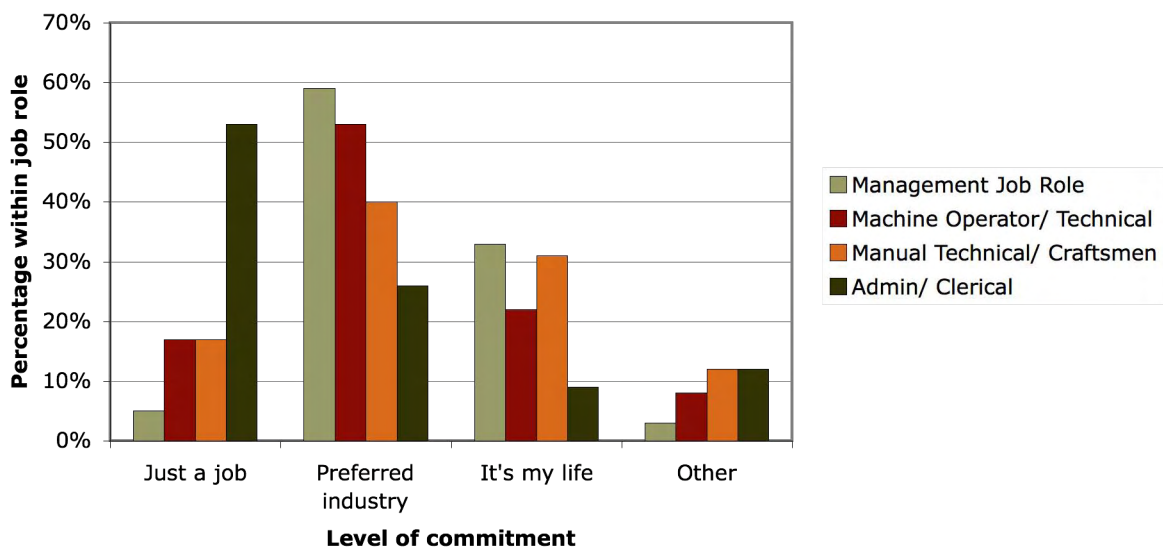
4.6.3 Commitment To The Forest Industry

We wanted information about the stability of the four fifths of the forestry workforce which does not expect to leave within five years. Considerable insight is offered by the findings on Dissatisfaction. In order to add to this we asked a direct question about Commitment to the Forest Industry.

Half the respondents (50%) feel the forest industry is their preferred industry, a significant proportion describe the industry as being 'their life' (27%) with just 15% feeling it is 'just a job'.

Stated levels of commitment were compared between job roles and are presented in the pie charts below.

Figure 17. Commitment to the industry by job role



The overwhelming majority of the admin and clerical staff feel no commitment towards the forestry industry and view their role as 'just a job'.

Those in management are more likely to feel that the industry is their life or at least their preferred industry.

“Anybody who’s in the forestry industry works long hours. A lot of it is for the love of it. It’s a seven day a week thing.” (Forest Manager)

Views of machine operators were mixed although there are more in this job role who see it as their preferred industry.

“But I think there’s not enough incentives. This ‘knocking your pan in’ for the same money as the last 12 years. Some days I can hardly get out of my bed cos it’s just the fact that you think, well, here we go again.” (Manual Harvester)

“Now I’ve been cutting about 20 years and, like I say, most of the guys I use to cut beside have all disappeared into the likes of working on farms, shops, poultry farms, different things. And I keep thinking to myself ‘what the hell am I doing? Why am I still doing this?’ I have even met them in the street and they say “ You’re not still at that cutting?” They think you’re off your heid! That’s the attitude!” (Manual Harvester)

Manual technicians and craftsmen are more likely to feel that their role is 'just a job' although again, responses were mixed and there are also many in this job role who feel that the industry is their life or at least their preferred industry.

“You do tend to find that people tend to hang on; they stay in the industry as much as they can. It’s in the blood, as they say. And when I first got involved in this business, to go up the wood to see customers was such a bonus for me because that was the place, you know I thought it was a fantastic place the forest. I grew up there.” (Machinery supplier)

Commitment to the industry was then compared between sectors and results are shown in the table below.

Table 30. Commitment to the industry by sector

Sector	Just a Job (%)	Preferred Industry (%)	Its my Life (%)	Other (%)	'Score'	'Commitment' Ranking
Tree nurseries	30	60	0	10	1.3	13
Ground preparation, drainage & road building maintenance	17	46	21	16	2.4	10
Establishment and Maintenance Operations	8	63	21	8	2.5	7=
Arboriculture	0	46	46	8	3.5	1
Wildlife/Recreation and Conservation	6	37	46	11	3.4	2
Plant Machinery, Supply and Maintenance	0	60	20	20	2.9	4=
Harvesting – mechanical	11	43	39	7	3.0	3
Harvesting – manual	0	85	15	0	2.5	7=
Forestry Management	13	51	29	7	2.7	6
Education and Training	0	71	29	0	2.9	4=
Haulage	27	52	14	7	1.9	12
Timber Processing	37	33	26	4	2.0	11
Supplier of Materials/Services	0	83	17	0	2.5	7=

The final column of this table is a score intended to reflect the average commitment suggested by the responses for each sector. The score was created by awarding 0 for 'It's just a job', 2 for 'It's my preferred industry' and 5 for 'It's my life'.

This column highlights the high level of commitment in Arboriculture and Wildlife/Recreation & Conservation and the low levels in Tree Nurseries, Haulage and Timber Processing.

In spite of differences between sectors, it is important to emphasise the generally highly positive nature of these responses. Only a small percentage are not prepared to say that forestry is their preferred industry.

4.7 Appendix D & E

In addition to the analysis in the text of this report two further methods have been used to provide insight.

Appendix D consists of profiles of 'average representative individuals in each sector'. These are based on the questionnaire responses. Each profile includes a question for 'policymakers' which is intended to be thought provoking.

Appendix E consists of 3 'Sector Groupings'. Questionnaire responses broken down by sector showed consistent agreement and overlap amongst certain sectors. For instance, many of the findings for those involved in Mechanical Harvesting were very similar to those for Establishment and Maintenance workers (with certain significant exceptions) and, in interviews, interviewees from these sectors very often agreed with each other about the nature of the challenges they faced. It might follow then that policies designed to help one sector might well help the other. As an interesting (if highly unscientific) exercise, we looked at all the sectors and grouped them according to where the greatest 'overlaps' seemed to occur in both our 'hard' and 'soft' data. They are reproduced in Appendix E in case others find them interesting or can see some potential in this approach.

5. Issues & Challenges

In this section we set out what we see as the clearest issues for policymakers which arise from the study. The complex and interrelated nature of the variables means that it has been difficult to separate out discussion under single headings. Furthermore a full discussion would require individual analysis for each of the 13 sectors. Such detail is beyond the scope of this study. The style is intended to be brief and provocative.

We have built on the key aspects of Section 4 and added further discussion based on the wide-ranging interviews. A full appreciation of each aspect may require that the reader recall the relevant part of Section 4. It should be noted that Section 4 also includes much 'hard' data about forestry work which will not be raised again here.

The quotes contained in this section have only been used where they are felt to be representative of a prevalent opinion within a sector. We hope that they add 'flavour' and 'character' to the discussions hereunder and also give a 'nod' of thanks to the many interviewees who gave up their time to contribute to this survey.

5.1 Recruitment: attracting the right people in the right numbers

Part of the brief for this study was to assess the recruitment issues in the Industry.

With a significant proportion of the commercial forestry in the cluster area reaching maturity, it was anticipated that increased production levels would require an expanded workforce. It was also suspected that businesses currently operating in the industry are finding it increasingly difficult to recruit new people.

5.1.1 The Current Level of Need

“We have a hell of a job recruiting people. I mean your average chap driving the lorries at Tesco’s, he stays nice and clean, and he doesn’t need to get dirty out in the woods. It’s very difficult to recruit someone to sit on top of a crane to get rained upon, snowed upon, to put themselves at risk. They don’t get paid any more - that’s the problem ”
Haulage Co. Director

“I think if you separate the manual jobs from the machine-based jobs, you are looking at totally different recruitment issues altogether.” Estate Manager

Asking people working in the Forest Industries to assess recruitment needs in terms of numbers elicits a complicated array of responses. There are differences between sectors and between job roles. However, the analyses of the age structure and retention profile of the forest industries, together with the responses of interviewees make it clear that there are currently recruitment challenges being faced in most sectors, especially on the forest floor. So:

“My business could grow. The problem with us is finding operators. It’s a major issue for us all, not just myself. Everybody you speak to has this major problem.”
Establishment contractor

“They need to attract more people into the industry definitely. ‘Cause everybody that we speak to is short of men.” Mechanical Preparation Contractor

“On the establishment side there is an extreme shortage of workers and contractors. It’s getting worse - mainly as a result of legislation.” Estab. Contr.

“At the FC, we are getting by – we are getting enough people to drive the machines. The Modern Apprenticeships are helping as well.” Trainer

And yet, from an Estate Manager:

“The truth of the matter is that we have got guys around now who can do the harvesting - we have got the capacity and we’ve got the machinery. I don’t think we are short of contractors. We have had squads this year phone up for work and we’ve not needed to use them all - local south Scotland squads.” Forest Manager

For many employers, especially in the forest floor and processing sectors, the issue is as much about quality as quantity. These quite possibly are interrelated since employers are often faced with very few candidates for vacancies and so are ‘forced’ to recruit people about whom they have significant misgivings. A possible consequence of this is that some employers say that they can get people to fill vacancies but they can’t get them to stay in the job.

5.1.2 The Future Level Of Need

“We will see the ‘gaps’ in the labour requirement first in South Scotland.” FC Trainer

In terms of whether the industry will need to expand its total workforce in the next decade or two, the predominant opinion was ‘Very little if at all’. Two explanations were given:

Some did not believe that production levels would increase significantly

Some believed that, even if production levels rose, development of, and investment in, better equipment would obviate the need for a significant increase in manpower.

“I’ve heard that for the last 5 or 8 years. The FCA was talking about all these thousands and millions of metres to come down but it doesn’t seem to work that way. The harvesters themselves do a lot of work and all that’s happening there is these boys are doing 10-12 hours a day and so they take up a lot of the extra work. Then they just bring on another harvester and another. It’s not a problem to get a man for the machine.” Mechanical Harv Contractor

“I’m not totally convinced that there will be a huge increase in the amount of trees being felled. We are coming towards a situation where the age of the trees is such that there is a lot of production there to do. But on the forests that I look after, I’ve had felling squads in most of my productive forests every year now for the last three years so I don’t foresee any great changes. I think there are a lot of forests stuck on databases that were planted 30 years ago that people think will make something but probably won’t.” Estate Manager

“I don’t see that I will need to employ more people over the next 5 or 10 years. I might invest in more modern machinery to increase production without changing the number of staff.” Sawmill Director

“I don’t think we’re going to see a lot more people involved in forestry. I just think the machines are going to get bigger and they’re going to get more efficient and they’re going to work longer hours.” Machinery supplier

Irrespective of the future size of the industry’s workforce, it is clear from the demographics of the current workforce that the industry as a whole will need to recruit on a larger scale than has been the case over the last decade or two.

The average age of 45 years is 5 years above the average age of workers in the region and 10 years above the average age of workers in Edinburgh. It is clear that a large proportion of the current workforce will have retired within 15 years. Indeed, about one fifth of questionnaire respondents expected to leave the forest industries within five years. Although this proportion was much lower in Wildlife/Recreation/Conservation and, in spite of their high average age, a little lower in Education and Forestry Management, other sectors are set for even more dramatic attrition rates. For example, the oldest sector, Manual Harvesting, seems set to lose almost a third of its workforce in the next five years.

The \$64,000 question is: How difficult will it be to replace these people? Once again, the interview responses were mixed. A few examples of the minority, more optimistic, opinions:

“I think, as with everything else, if there’s a requirement, people will be found. It will just mean training that’s all.” Forest Surveyor

“I think machine operators will always appear as required.” Sawmill Director

Whilst this optimism might be well founded in these particular companies or sectors, the overwhelming view is that recruitment will provide a significant challenge to an industry that is already showing signs of struggling in an increasingly competitive labour market. This challenge would appear to be greatest at manual, technical and crafts levels.

“I think that there’s ways that we can encourage people to come into the industry but not as manual - that’s going to be the big problem; getting contractors. But with what they get paid, unfortunately, there’s no encouragement to go into that sector.” Forest Manager

The situation may become especially problematic in Ground Prep., Establishment & Maintenance, and Manual Harvesting since they have the oldest workers but each sector has its own dynamic and there will not be a single way forward. Whilst many sectors expressed concern over the industry’s ability to recruit people (especially the young), it is true that many see the problem ‘disappearing’ if the price of timber were to continue its recent rise. An assessment of the impact of such an economic change, together with various important current strategic thrusts (biofuels and carbon recycling to name but two) is beyond the remit of this report but could well significantly shift the industry in terms of its recruitment needs and its ability to respond to them.

We need to draw attention to a particular exception to the discussion in this section and all other discussion on recruitment. The Wildlife Rec sector differs from the others in terms of future recruitment needs. Firstly, it is seen as a sector which will grow in the medium term. It has a younger profile than most other sectors and is an attractive 'lifestyle' choice for career changers. The questionnaire findings indicated clearly that the workforce are very positively committed and not seeking greener grass elsewhere. There seems to be no problem in attracting people into the further education courses relevant to this sector.

“You can see that social forestry is going to get bigger and bigger. Whatever political changes might happen, we will still be ticking the leisure and health boxes.” Community Ranger

It should also be noted that entrance into Education & Training positions requires experience elsewhere in the industry so this sector is also an exception to the general analysis about recruitment.

5.1.3 Why might future recruitment be more difficult?

Section 4.3.1 summarises the questionnaire findings on how our respondents entered the forest industries. The interviews have provided a picture of how things have changed since the days when many of the current workforce joined the industry.

The interviews confirmed the questionnaire findings that the overwhelming majority of people working in the FI (particularly the Forest Floor Technical and Crafts sectors) had come into the industries thanks to one (or more) of very few critical 'predisposing' factors being present. These critical factors are:

- Being encouraged into the industry by a family member
- Being exposed to informal on-the-job experience at an early age
- Having a community/cultural heritage steeped in rural culture
- A predilection for working in the outside environment
- A realistic understanding of work in the forest industries
- Seeing the industry as an opportunity to earn comparatively 'good' money

These five 'recruitment hooks' would seem to have served the industry well for generations and provided a sort of informal 'recruitment conveyor-belt', adequate for the purposes of an industry that had, through increased mechanisation, a shrinking workforce requirement:

"People used to just 'fall' into the forestry side". Forest Manager

But, for various reasons (economic, cultural, societal), these five 'hooks' do not appear to be the forces that they were. Indeed, some would seem to have effectively ceased to be relevant at all.

5.1.3.1 Family connections

Until the last decade or two, it would appear to have been the norm that young family members would be encouraged by an older relative working in the industry to join them 'in the forestry'. This 'familial' route into the industry no longer seems to be happening to the same extent.

More than that though, today's forest industry workers, (especially at the technical/ machine operator and craft levels), are not just less likely to recommend the industry to their young relatives but would quite possibly actively try to dissuade them.

"A friend of mine has a 28-year-old son and he said to me that if I put his son up for a job in here, he would kill me!" Process Worker, Timber Processing

"My son's a kind of outdoor person. But even I've said to him "Son, you're not going to be cutting trees". Now that's coming from a woodcutter! I don't want my laddie doing it

because I cannae see it getting any better. And I would put off anybody who says I'm going to cut trees – I would put anybody off.” Manual Harvester

“My boy would probably jump at a chance to do this but I think my wife would be upset if he was to tell her “I want to cut wood Mum”. Don't get me wrong though. He has been out – he's seen the job and he's held the saw and cut logs but I've said to him that he should stick at the school and try to get himself a job ” Manual Harvester

“The new young people are not coming through with the same mentality. They don't want to drive a lorry. The older chaps here who have their sons working here but you ask their sons who are at school “What do you want to do?” There's not one of them will say, “I want to drive a lorry”. Haulage Co. Director

"If you ask people now if they would like their kids to go into the FI, they would mostly say "no". Free-lance Trainer

This 'lack of enthusiasm' is obviously a symptom of low morale in some parts of the industry and implies a belief that motivation can be found in other industries where the sources of dissatisfaction are less significant.

Although interviewees were only asked if they would recommend the industry to family members, it would be fair to presume that someone who would dissuade their children to enter the industry would also be unlikely to be much of an 'ambassador' to anyone else considering joining it.

5.1.3.2 On the job experience

From the questionnaire responses, it is apparent that for many in-forest technical workers, being given informal practical experience operating a machine was a critical factor in their entry into the industry. Comments expressed in the interviews confirmed the questionnaire findings:

“There was the forestry all about the farm and there was always machinery working in the wood and we used to go and watch them working and eventually got a go in one of them. That was it!” Mechanical Preparation Contractor

“A lot of people used to start off on the saws brashing and then they'd maybe get on a machine at dinnertime - just to have a shot in the machine. You'd gradually get to know the machine.” Mechanical Preparation Contractor

However, regulations introduced over the last 15 years or so mean that certification is required to operate most machinery. Also, age restrictions have been introduced together with supervisory regulations and these have all combined to have a dramatic effect on the recruiting power of 'giving a boy a shot'.

“All these certificates limit you taking a boy out there and giving him a shot. It used to be that anyone that showed an interest in the job, out he came with you and worked away there quietly on the digger beside you. But now you can't do that.” Establishment Contractor

"They wanted to make the industry more professional. They have done but it's put up a massive barrier for anyone who wants to come into it." Mechanical Harvester

“With all the insurance and certificates and that now, a lot of contractors aren’t so keen to give boys a shot.” Mechanical Preparation Contractor

From these comments and many others in a similar vein, it would seem that this practical experience, which for many acted as the irresistible recruitment ‘hook’ in many sectors, has been all but extinguished.

5.1.3.3 Cultural Background

Direct Forestry Connections

In the past, communities located close to large woodlands would have been dominated by the forests around them. The woods would provide the context for many cultural activities of the community. Crucially, in terms of new recruits for the industry, most households would have had at least one member deriving a living from the forest. So for many young people the work offered by the forest was an obvious and familiar option.

“There was very little money in the job but everyone got on with everybody. It was a community orientated job really because we were all from Ae village, Tweedsmuir all forestry.” Establishment contractor

“I think if you are out in the forest a lot as a youngster you get to enjoy the forest life. I think probably the worst thing about the job is the inclement weather and you get used to it if you’re brought up in it. Saw Mill Director

But the demographics of these villages (and, of course, the nature and interests of the people living in them) has changed dramatically in recent times and many communities are no longer connected with their surrounding landscape in quite the way they once were:

“The communities have changed. Village life has changed a lot. Going back 40 year, they were most of them forestry in the village, it was a community. They were all born and bred in that village. Now they’re all moved out but the big majority that’s coming into the villages is incomers from cities and they’re not the least bit bloody interested in the countryside.” Manual Estab & Maintenance Contractor

“In Ae village two thirds of the houses had a forest worker in but not now.” Mech Harv Contractor

“I think 20 years ago it was attractive to get a job on your doorstep and avoid all that travelling but now they’ve all got cars anyway and so travelling to work doesn’t bother them.” Sawmill Director

“25 years ago, 75% of the people in the village leaving school would come and ask me for a job but over the last 5 years I haven’t had a single person from the village come and ask me for a job. They are all going off to university or technical college to get further training and progress.” Sawmill Director

Agricultural Connections

Recruitment into the forest industry in many sectors has traditionally drawn significantly from the farming community. There are obvious overlaps in the type of work, especially the connection to the land, and many forestry employers hold ex-farm workers in high regard when recruiting.

“The right calibre of person is someone from a farming background who will go out in the rain and the snow and not be frightened to work long hours etc etc.” Haulage Co. Director

“The best lads we all get are farmers’ sons because they are willing to work. They know what a day’s work is. They are willing to look after the machinery. They’re not bothered being on their own – they are always the best.” Establishment Contractor

But, just as the forest industry has gone through huge changes, so too has the agricultural sector. Increasing mechanisation, greater regulation and reduction in profits (mirroring changes in the forest industries) have all contributed to a greatly reduced labour force. Thus, the pool of potential labour from this source on which forest industries could draw has declined. One interviewee concludes,

“There are far fewer farm lads with machine experience, used to hard work and the outdoors, who are keen to move across.”

5.1.3.4 Predilection for working outdoors

For many currently in the industry, at all levels and all sectors, a key motivator for coming into the industry (and for staying in it) was an enjoyment of working outside in the natural environment. This was often probably a consequence of 5.1.3.1 and 5.1.3.3 above but was a factor so often referred to in interviews and questionnaire responses that it deserves a mention in its own right. We should note here that 'working outdoors' does not necessarily mean being exposed directly to the elements but it does imply a likelihood of being relatively isolated for long periods with a requirement for self-discipline and enjoyment of your own company.

“You’re travelling round the countryside, going in places no one’s even seen before and seeing trees that no one’s ever seen before. I know it sounds a bit airy-fairy what I’m saying but you know what I mean.” Arboriculturalist Contractor

“Being outside. You’re seeing different scenery. I’m seeing things that you, walking through the woods, would never ever see. Because I am going to places you would never go.” Forwarder operator

“Years ago you would meet electricians and plumbers who had crossed over into forestry and thought it was wonderful to work outdoors - even if it meant taking a drop in wages.” Forest Manager

“You get the guys off the dole queue who are giving you seasonal labour They last a couple of days out in the sleet in the hills in Galloway and then they don’t want to know.” Forest Manager

5.1.3.5 A Realistic Knowledge of The Range of Jobs in the Forest Industries.

There is perceived to be widespread ignorance of what jobs are available in the forest industries.

"I think if you took a straw poll of a hundred people, a large percentage would have no concept of what goes on before a tree's planted. They have no idea of the planning and the thought processes behind establishing a woodland." Forest Surveyor

"There is a public awareness challenge. Most people think only in terms of being outside taking down trees with a chainsaw but now the industry is much more technologically sophisticated and there are engineering, IT, etc jobs in various sectors." Education Manager

5.1.3.6 Seeing the Industry as a Reasonable Financial Opportunity

Historically, although money has not been the main reason for joining the industry in most sectors, for many the rewards seemed to be reasonable. For some, particularly machine operator, craftsperson levels, the industry compared favourably with careers in other industries at similar levels.

In most sectors now, the technical equipment and plant are far more sophisticated than in the past and so setting up a new business requires major capital investment.

"You want people to come into the forest industry? If there was an increase in value then things would be self-righting." Haulage Co. Director

"The wages we pay are not attractive when you compare with a trade like joinery or plumbing or as an electrician. My skilled staff will be earning about £7.50 an hour – that's all they will be earning and I can't afford to pay much more than that." Sawmill Director

5.1.4 Understanding and Drawing From The Labour Market

The main labour market segments which are sources of current recruitment represent different challenges and these are examined below. However it should be noted that the forest industries have some problems which apply across the labour market generally. There are far fewer unskilled jobs than existed 20 years ago and most sectors are hugely more capital intensive. Hence the barriers to entry, even for the least challenging jobs in most sectors, are considerable.

"We are now much more efficient and have invested in better equipment. This has led to a requirement for greater skills in our workforce. I have a staff of 28 and there are only 3 jobs where I could put an unskilled person." Sawmill Director

The skilled jobs, which are the overwhelming majority, are more skilled than previously and require qualifications and certification. The gap which has to be bridged between training and professional competence can be large. This will be discussed in the section on Training below. We will also discuss later the important motivational factors, such as financial rewards and opportunities for advancement, which are lacking in many sectors.

5.1.4.1 Ex-forest workers

There is a view that over the last 30 years or so, since the days of particularly high levels of employment in the forest industry, there has been a pool of ex-forestry workers who could always be called on to fill vacancies in many sectors.

“A lot of contractor guys have gone out of the industry because there wasn’t the work there for them or there wasn’t the returns to keep these guys employed but who could probably quite quickly step back into the industry.” Forest Manager

“There are a lot of people on the fringes of the industry who could come back in. There’s a few people that are wanting in the industry that maybe havnae found a way of getting in.” Mechanical Preparation Contractor

This pool, if it really exists, would mostly have got their initial experience in the industry during the seventies, and so are now of a similar age to the current incumbents. They are therefore mostly in their forties and fifties and are presumably becoming unsuitable for many of the more menial or physically demanding jobs. They are a rapidly diminishing pool who can all be expected to retire over the next decade - precisely when many of those currently in the industry will also be retiring and, presumably, when the industry will have the greatest recruitment needs.

5.1.4.2 Youngsters

When we discuss youngsters joining the industry the major route in is via training of one kind or another. In a subsequent section training is dealt with specifically. In this section we are making general points about attracting youngsters.

The low numbers of workers under the age of 25 indicates a real issue with attracting and developing young people. The interviews simply confirmed the questionnaire findings. No one, in any sector, told us about an influx of youngsters and this is a significant concern for most people we talked to and is obviously a huge issue for the industry.

“I think we desperately need youngsters to come into forestry and, more importantly than anything we need committed young guys to come in at ground level. And to be going out and planting trees, that kind of thing.” Estate Manager

Primarily views expressed both via questionnaires and interviews, fell into two camps: those that blame the forestry industry and those that blame the young people.

There was considerable frustration expressed about what is seen as the changing work ethic of young people in general and especially their disinclination to take on work that may be menial, physically demanding or in unpleasant weather conditions. This opinion was, naturally, particularly strongly held in machine operator and craftsperson roles:

“The youngsters of today are not interested in manual work. They seem to think, “I’ll not do that – it’s raining!” Before you would have said “No, no. You’re going out there.” It’s a different mentality now.” Haulage Co. Director

“You see, to me, young people like to work in groups. They have got to have pals and mates working with them. Where we work, where anyone works in forestry, there might be two of you on site but you are spread well across the site for safety reasons. You work a lot on your own.” Establishment Contractor

“Young people don’t stick it. They don’t like the hours and remoteness.” Mechanical Harvester

“The majority of the ones coming along now... you think they are keen but they just don’t stick at it.” Sawmill Director

“There’s a lot of people come and have a go in the machines and say ‘god I could do this’ and then when they start doing it every day, 10, 12 hours a day, they say ‘no, I don’t like this anymore’.” Mechanical Preparation Contractor

In part, this perceived change in young people’s expectations from a job is put down to a wider, societal, lack of ‘connection’ with land-based industries:

“If they haven’t got a background or father or an uncle or whatever with a background in machine operation or some sort of connection with the countryside and woodland, they don’t seem to get pulled in that direction. If they slip past the 16, 17, 18, it’s too late for them. They need that couple of years to really dig in and learn.” Machinery Supplier

“It’s not just working in the rain all day, they have to be enthusiastic about something – it’s trying to get them to take a genuine interest in what they are doing.” Estate Manager

As the demographics of Scotland change, and the population ages, young people can afford to be more ‘choosy’ about their work. The working conditions and management styles that they are prepared to accept are possibly different to those that have prevailed in the Forest Industries, especially at craft and technical levels and possibly at admin levels.

“The company finds older people more reliable than the young ones. If young guys come in for a full week, it’s an achievement!” Machine Operator, Timber Processing

So, young people are perceived to be more easily deterred by the prospect of long hours and outdoor work and so will be more inclined to join other industries where these deterrents are not so much an issue.

“You can’t get the young ones to work night shift anymore – they want to go out to the pub.” Process Worker, Timber Processing

Those who currently work in forestry, though they are fulfilled in their own lives, are often not keen to encourage their own children in the same direction and thus supply a ready source of recruits who know what to expect. Initiatives are required to assess the attitudes and expectations of young people with respect to employment and move the forest industries in their direction. This is a major project.

It seems to us, as management consultants, that there is an easy acceptance in many sectors that much of the work is arduous, tedious and badly paid. Nevertheless there is still criticism of youngsters who "can't stick with it".

“They think you’ve got no shout. If you give them a row for that they think ‘Bugger you, I’m away’. I just think its their attitude they’ve got is the problem. They just won’t take us telling them what to do.” Establishment contractor

Is it really beyond the wit of managers in charge of such work to design jobs, build teams, and create progression possibilities and reward structures which successfully motivate the new generation? Further research into this area would be useful.

A relevant issue when considering attracting young people is the careers advice they are given in school. There is much concern that forestry is not viewed positively as a career option. Three quotes express the general view:

“One of my partners in the crane manufacturing business used to work with one of the schools in Lockerbie. He had two other businesses and once a year he’d talk to the kids and try and select kids who were suitable for a position as a trainee engineer. And then suddenly he was being denied access to anybody other than the ones who would definitely not have any chance of getting any academic qualifications”. Machinery supplier

“I don’t think forestry is being sold to the engineer types, the technicians, the computer whiz kids, they don’t think there’s anything out there in forestry for them and there is.” Forest Manager

At schools I would think that the careers guidance would discourage them from coming here. I am sure they would be told, “You’ve got better brains than that”. Sawmill Director

We were informed during the interviews of several initiatives aimed at enhancing awareness of the range of career opportunities in the forest industries. These undoubtedly positive developments result from a recognition that the traditional path from school into forestry requires more proactive involvement from the industry than was once the case.

5.1.4.3 Eastern European labour

We were told about successful use of East European labour and this will no doubt be a relevant path for employers to explore. This is a very fluid issue at the moment as Eastern Europeans become more aware of the opportunities in the industry and employers become more aware of this option for solving some of their recruitment problems.

Much of the immigrant labour would seem to be in the less skilled jobs which local people are reluctant to do.

“By and large I think the foreign workers who have come over here are terrific. I think it’s going to be a wake up call to a lot of our guys” Timber Process Worker

“We’re already having Eastern Block workers. I had some planting trees for us recently. I think that the foreign labour market may be a good thing because there’s going to be a resource of labour there. It’s maybe not good for the local economy, but at least there is actually going to be a resource of labour there for the planting and the manual tasks to get done “ Forest Manager

“Definitely on the haulage side. There are eastern Europeans driving now. “ Haulage Co. Director

“The eastern European labour is coming into the more menial tasks at the moment – a lot of the mills are starting to employ them.” Saw Mill Director

The overwhelming attitude of the workers already in the industry to the arrival of such workers is positive (if a little sad that local people are not apparently interested in many jobs in the industry).

“Imported labour is coming. It’s got to come. They’re not going to get them in this country to do it.” Manual Estab & Maintenance Contractor

“I think that one of the problems we’ve got in this area is, we’ve got so many menial tasks, especially in the sawmills. Can’t get staff. We’re bringing in immigrant workers: that is a very dangerous thing for this area, I’m sure.” Machinery supplier

However, there was the view expressed that the Eastern European ‘solution’ is probably only a short term opportunity and therefore has a significant ‘downside’ in terms of long-term quality issues:

“If I plant a tree, I’ll go back in seven years time and I’ll still be interested in it. But will they if they come in from abroad? Plant it, shut the gate, ‘I’m not interested and I’ll never come back’.” Manual Estab & Maintenance Contractor

“Foreign labour’s not a long-term solution anyway because to get the best job done you need the guys who plant the trees to do the maintenance. Then they feel they have got a stake in it and then they will look after it. They know that they have got work to go back to. They know that if they do a good job in the first place they will benefit because it will make the weeding easier or whatever.” Estate Manager

It is to be expected that an influx of overseas labour would have a suppressant effect on wages in certain sectors. Lack of an acceptable level of reward seems already to be a barrier for recruitment of indigenous labour and so this immigrant labour might undermine initiatives designed to recruit local young people into the industry.

Out and out opposition to the importing of immigrant labour was rare.

5.1.4.4 Women

In the analysis of our questionnaire data we have not distinguished between male and female responses. The small proportion of females, 10.5%, did not permit valid analysis. This was especially the case because most of the females were in a single job role - Admin/Clerical. It should be noted that women constitute 46% of the national labour force.

It may be the case that women looking to the industry as a prospective employer might be deterred by the lack of women in the existing workforce. There is little further we can add here except that an industry which is experiencing recruitment problems would be advised to explore all its options.

5.1.4.5 Career Changers

Forestry has always recruited people from other industries. Some sectors are particularly attractive as lifestyle choices while others provide convenient, if low paid, employment to those seeking to work locally rather than uprooting.

“The mill has scored with a pool of reliable men who had been working at other places that have shut down. But that’s all coming to an end.” Machine Operator, Timber Processing

“Agriculture I reckon, that’s where it comes from. ‘Cause I mean basically sitting doing harvesting in the woods on a harvester or a forwarder or whatever, it’s the same as agriculture, sitting on your arse in a tractor - same thing really.” Arboriculturalist Contractor

There may well be a continued supply of lifestyle motivated entrants in sectors such as Wildlife Rec but as discussed earlier it is not clear that a pool of other potential labour will find the industry attractive.

5.2 Motivating: Making the Forest Industry a more desirable place to work

In Section 5.1 we examined the recruitment challenge facing the forest industries by exploring the current and future levels of need and why it might get harder to use the traditional recruitment sources. The section concluded with a look at each of the labour market segments which might be drawn on in future. It is inevitable that effective ways of tackling the recruitment challenge will need to be aimed at specific sectors and job roles. Not all of the factors deterring recruits can be made positive but those working in many sectors find huge attractions which need to be communicated to potential recruits. The issue is not, however, simply one of Public Relations. There are real ways in which the forest industries are unattractive as career options for many potential recruits. These go to the core of the human relations culture of many of the forest industries as this section of the report shows.

Questionnaire and Interview evidence suggests that for many people working in the forest industries the work is rewarding and challenging. The on-going commitment to the industry is testament to the scale of these 'positives' in so far as they succeed in outweighing the considerable 'negatives' also expressed. However, for many, this equation would appear to be finely balanced. Perhaps more worryingly, for those outside the industry looking in, the equation seems to frequently be negative.

The questionnaire findings on motivation and satisfaction in the forest industries have been presented and analysed in Section 4.5. It was the questionnaire outcomes which gave rise to interview questions about financial rewards, opportunities to progress, red tape, supervision, hours of work, business-to-business relationships, and problems with 'management'.

In this section we draw mainly on the interviews to examine this range of topics linked because they relate to how people feel about their work, the industry and each other. It will never be possible to completely resolve the issues raised under these headings but the reward for any positive impact would be a more contented and motivated workforce and an industry with few recruitment problems.

5.2.1 Increasing The Financial Rewards For Work In The Forest Industries

For many interviewees the key to resolving the 'people issues' in the industry is to get more money in and ensure it is distributed where it is most needed.

*"If I could do one thing to make an impact in the industry it would be to put some money into the primary contractors' pocket because we just don't pay them decently."
Trainer/Lecturer*

Yet it is clear that few respondents chose forestry, and continue in it, with financial reward at the top of their list of priorities.

"You certainly don't come into forestry for the salary. If you come into forestry for the salary you are going to be disappointed and probably disenchanting." Estate Manager

"I think that there's ways that we can encourage people to come into the industry but not as manual, because they're going to be the difficult ones to get - that's going to be the big problem; getting contractors. But with what they get paid, unfortunately, there's no encouragement for them to go into that sector of the industry." Forest Manager

Some sectors were relatively content with their pay - Education, Materials & Services, Wildlife/Recreation & Conservation and Forestry Management.

"Compared to other industries I could have gone into with my skills, the pay is actually pretty good." Community Ranger

Nevertheless it is clear that some sectors (especially Manual Harvesting, Ground Prep, and Establishment & Maintenance and Plant & Machinery Supply & Maintenance) are in particular distress and some interviewees have described the situation as critical.

"This 'knocking your pan in' for the same money as the last 12 years Some days I can hardly get out of my bed cos it's just the fact that you think, well, here we go again." Manual Harvester

"To be honest if somebody gave me the money for the machines then I would say 'Bye bye'." Mechanical Harvester Contractor

"If I was only interested in finance I would sell up tomorrow and invest the money and make a lot more outside the industry." Sawmill Director

In terms of job role, the workers unhappiest with their levels of pay were at craftsperson and operator levels. Significantly, the 'paymasters' of those workers supported their views:

"There's not enough money, profit, in the business to give the boys what, in my opinion, they deserve." Haulage Co. Director

"The wages we pay are not attractive when you compare with a trade like joinery or plumbing or as an electrician. My skilled staff will be earning about £7.50 an hour – that's all they will be earning and I cant afford to pay much more than that." Sawmill Director

"Everybody wants to make a profit but I think it's the people with the machines in the wood that suffer. The contractors and the guys they employ. I don't think the contractors are being that greedy. I know what I get offered and it's crap compared to what it used to be." Mech Harv Contractor

More money, for example coming from a continued increase in timber prices, well distributed within the industry, would remove a major barrier to tackling some of the difficult challenges. Possible profits of landowners and large organisations would need to filter through the entire industry.

Those most optimistic about an increase in future rewards were Wildlife/Recreation/ Conservation and Ground Prep. Most sectors expected things to pretty much stay the same.

"But I think the whole thing boils down to that a guy has got to want to drive a machine. If he is just wanting a job its not worth employing him. If we got them in with more

money they would leave anyway. If it's not for them, it's not for them." Establishment contractor

5.2.2 Improving Opportunities To Progress In The Forest Industries

We found we had recorded few specific quotes on this issue nevertheless both the questionnaire findings and interview discussions indicate that many workers in forest industries are dissatisfied with the lack of opportunities for improvement and advancement which are available. Many of those working in the industry are self-employed and most of the employing businesses are small, hence there are few direct opportunities for conventional hierarchical 'progression'. Even in the larger organisations the management tends to be very stable and there is little growth to sustain new promotion opportunities:

"Our turnover of staff is practically zero. They leave when they retire." Forest Manager

Only a small minority of forest industries people think of career progress in terms of climbing up an organisational ladder. For most, forward movement in their work life may mean earning more than last year, or working towards a new qualification, or expanding the business.

The implications of an industry in which young people may find it hard to see a clear career progression are obvious:

"I think lots of people don't even know that forestry is a career actually. None of my mates at school did, certainly." Estate Manager

5.2.3 Reducing The Burden Of Red Tape

Red Tape was identified in the questionnaire responses as a factor which causes huge dissatisfaction in several forest industries. It is not just an emotional issue, the costs in time and resources which can result from policing and control are perceived as considerable and often as unjustified.

"The paperwork is just them covering their arses for insurance purposes. It's so they can blame us if something goes wrong." Ex-Mech Harvester, now Arboriculturist.

"We're all interested in Health & Safety but it's got to a level that's impractical." Mechanical Harvester

Regulatory processes should place the lowest possible burden on any industry commensurate with achieving acceptable levels of control. Many sectors complained that the various regulatory bodies do not seem to collaborate with each other and much duplication of information provision, form filling and inspections seems to result.

"Over the years, as the money in forestry has reduced there has been a tendency to sail close to the wind on safety and regulations. This has lead to even more controls which of course costs more money. The enforcers grow in number and are just resented." Estate Manager

"There are too many guys running around in Berlingo vans who don't produce anything." Mechanical Harvester

The issue of certification ('tickets') will be raised again when we discuss Training but there is widespread acceptance of the need for improvement in the system.

"I do think that there should be more vetting of regulations (which give rise to courses) to work out if they are all necessary. An important issue is the alignment of competencies for forestry – we are trying to identify competencies for each type of work which would then be standardised throughout Europe." College Trainer/Lecturer

5.2.4 Improving The Supervision Process

There appear to be issues with the experience of working 'at the sharp end' in most of the sectors where this type of man-management is required. An old-fashioned 'us and them' mentality was frequently mentioned in interviews. There was little sense of involvement by shop floor workers in the progress of their organisations. This is particularly the case in Timber Processing. Supervisory 'man-management' skills appear to be in short supply. In sectors where there is strong short-term pressure on costs, the sceptical attitude to training generally is likely to be particularly dismissive of the need to learn and practise 'people skills'.

"That's how they motivate people – they just say 'If you don't like the work, there's the gate!'" Machine Operator, Timber Processing

"There's a lot of bad man-management – a lot of ignorant people that's come into forestry thinking that I can be Mr Big." Manual Harvester

There was some perception, not necessarily enthusiastic, among interviewees that the difficulties of recruitment being encountered mean they are having to think more about supervisory practices.

"I would say that this industry is so hard to recruit people into that you've got to look after them with kid gloves on. That's definitely more the case now than it was, say, 10 years ago. I've had to let people away with murder whereas even five years ago, no way! I would never have thought of it.." Haulage Co. Director

For some sectors, notably the timber processors, the issue goes beyond the way managers treat their workers face to face and includes the 'us and them' nature of organisational culture, structure, and processes.

"I think the structure is what causes things to break down. You have 5 or 6 senior managers who delegate to a line manager then a supervisor who is responsible for over 60 people and that's it – there's no team structure." Operator, Timber Processing

"I would suspect most of the mills are the same as ours in terms of the management style. The mills haven't moved forward like other places – not in terms of the culture." Operator, Timber Processing

"There's a 'them and us' mentality with the management. I think you would have to draw them a map for them to get to where I work. They have their wee enclave and you never get to see them." Processor, Timber Mill

"If something's wrong they will come and pick on somebody and not leave them alone. I would say its like institutionalised bullying. If you've got a mind of your own and you stand up to them, your card is marked." Processor, Timber Mill

It is easier to attract, retain and motivate people in jobs which are satisfying and rewarding. There is a widespread perception in the forest industries that it is a failing of young people, and others, that they do not wish to work extremely hard, for long hours, in difficult or unpleasant conditions and will not accept tight supervisory control. No doubt this has some validity but the changing character of our society is something that an industry has to work within. Is it beyond the wit of forest industry managers to build on the high levels of commitment and motivation in the industry and to design jobs, build teams, and create working conditions, progression possibilities and reward structures which a skilled supervisor can work within to motivate a new generation of recruits?

"You're likely to get the best results if they can come out where there are 2 or 3 of them perhaps working together and they are having a bit of a chat while they are working. It's not just working in the rain all day, they have to be enthusiastic about something – it's trying to get them to take a genuine interest in what they are doing." Estate Manager

5.2.5 Ensuring Hours Of Work Are Not Excessive

The issue of work-life balance is one which affects several of the issues discussed in this section of the report. We interviewed one young ex-Mechanical Harvester who, though he loved forestry had left the industry because "I've got a young child now and I'm just not prepared to not see her for weeks at a time." He now works in an industry in which he earns more money doing a less skilled (and less satisfying) job but at least he can have a good social life and see his family.

Many forestry workers saw long hours as normal but they may be a deterrent to the next generation:

"I've never seen long hours as a problem - just part of the job. But the young guys, they don't feel the same about it." Deer Stalker

"People are making decisions now that they are prepared to have maybe a little less money in their pocket and have a better lifestyle." Forest Manager

"There's a lot of people come and have a go in the machines and say 'god I could do this' and then when they start doing it every day, 10, 12 hours a day, they say 'no, I don't like this anymore'." Mechanical Preparation Contractor

Antisocial/Long Hours were also high up many sector's list of negatives. As one forest manager put it:

"If we lose people out of the industry at my level it's probably through the option of a better lifestyle where they can earn the same amount of money and have more spare time. Because I think people are becoming more aware of having their own time than they used to be." Forest Manager

"They are leaving it because of the hours they are having to work to get a decent wage." Forwarder operator

5.2.6 Improving Business-To-Business Relationships

An aspect of human interaction which was not examined in the questionnaires but which emerged in the interviews is that of how business is done. This was not a specific focus of the study but it came through so strongly that it seems appropriate to note our impressions. The interviews created

a picture of short term, hard-nosed relationships in which the cheapest quote wins the deal. Examples of collaborative commercial relationships do exist and are to be applauded, but seem to be the exceptions rather than the norm. On the forest floor, there are many who cite short-term contracts as powerful barriers in preventing them planning the development of their businesses. Businesses cannot rely on a track record of good quality work to ensure prices which allow for investment in people and machinery. The lessons of the Clegg Report still need to be learned.

Lest it be thought that this is a trivial matter a range of quotes is presented below and the range of sources should be noted.

“I think continuity of work would be one way to get people to come in – I wouldn’t want to give any work to anybody now because I’m frightened that I can’t give them long-term work and will have to pay them off.” Mech Harv Contractor

“A problem with this industry is that there isn’t enough respect for competitors – other firms in the same market as you.” Machinery supplier

“Harvesting is a very different issue and I think there is a case there for longer-term contracts and I think we need to more go down that line. But a lot of that is tied in with the way that the timber is sold.” Estate Manager

“I used to get it into my head that I wanted to be a professional chain-saw operator. Be respected. As years go by you think, “I’m just a woodcutter and nobody really gives a shit.” Manual Harvester

“I think that we rely very much on our sub-contract labour force and I don’t think we put enough effort in to support them; by way of training and by way of pay. But the two need to be tied together.” Forest Manager

“I know half a dozen cutters, really good guys and good cutters, and they got to the stage where they just went “F this’ I’m out of here”. They just couldn’t be bothered with the way contractors were treating them.” Manual Harvester

Contractors in the private sector might be dropped at any time which is a big issue for recruitment and the investment in training. Forestry Consultant

5.2.7 Problems With 'Management'

From the questionnaires it was clear that the nature of 'management' gave cause for concern in several of the forest industries. However the interviews indicated that what is meant by management differs widely.

For many interviewees what was expressed as resentment of 'bad management' was a general concern about the other specific issues dealt with throughout Section 5. It is perceived that 'management' must be to blame if there are no youngsters joining the industry, if training is inadequate, if hours are too long and rewards are poor. In other words this is not just a single issue about direct relationships with people called 'managers'.

There are broadly three aspects to what is meant by 'Bad Management'. Firstly, for some interviewees, such as Timber Processing workers, 'Bad Management' is a criticism of their bosses and particularly their supervisors. Second, for the in-forest sectors such as Harvesters, most of whom are self-employed, bad management means interference.

"Often the Site Manager has no understanding of what we're doing and can't make decisions." Ex-Mech Harvester, now Arboriculturist.

The third interpretation of 'Bad Management' is a criticism of those who influence the wider context of the industry as a whole. Feelings about this are often lumped together with a resentment of paperwork and other regulatory controls.

5.3 Training

Major research has already been undertaken into training in the forest industries. The brief for this survey was concerned with training primarily as part of the process of career development and this has been described in Section 4.4.

Further, the brief for this work precluded a systematic study of all aspects of training in all sectors. So, interviewees were asked to comment on their perceptions of the effectiveness of training in the context of its contribution to providing the workforce that the industry requires both currently and in the future. Specifically, they were asked to highlight issues on which, in their opinion, policy-makers needed to act.

The issues set out in this section represent, therefore, prevailing concerns and opinions and tend to focus on issues relevant to the sectors which are perceived as facing the biggest recruitment challenges. In this context, it is not surprising that the majority of views expressed are negative and critical of current training provision and the central themes are explored below.

It should be said, however, that positive attitudes to training are to be had, particularly in certain sectors. Notably, the majority of views expressed by the Wildlife, Recreation and Leisure sectors were more positive at all levels. Similarly, Forest Managers on the whole viewed the experience of getting their own qualifications favourably.

The most serious challenges were seen to exist in the training of machine operators, particularly those working on the forest-floor, and so the content of the following section heavily reflects that emphasis.

5.3.1 The impact of upskilling the industry

As the forest industry has become more technologically sophisticated, the number of jobs requiring qualifications, certification or specific skills has burgeoned. This would seem to be especially true in sectors with the greatest potential for mechanisation e.g. sawmills, many of the forest floor sectors and, to a degree, haulage.

“We are now much more efficient and have invested in better equipment. This has led to a requirement for greater skills in our workforce. I have a staff of 28 and there are only 3 jobs where I could put an unskilled person”. Sawmill Director

As discussed previously, this has effectively provided a significant barrier for entry for many potential recruits and has ‘disengaged’ some of the informal recruitment mechanisms that previously prevailed.

“My feeling is that people no longer fall into the forestry side; they’ve got to be trained, and have formal qualifications before they’re even accepted.” Forest Surveyor

Although there is evidence of a high level of compliance with certification regulations, on the forest floor there are many reports of skill deficiencies at some levels, although there is disagreement as to whether it's a case of 'can't do the job' or 'won't do the job'...

"I do unfortunately think that there is a basic level of skills that a lot of these guys have not achieved. Sometimes you have to go out and tell them time and time again and then they go out and do the same bloody things wrong." Estate Manager

"They can't understand things like basic calibration of a knapsack sprayer, which is not a complicated piece of kit, but you have to have a certain level of basic maths to deal with it. A lot of the guys that are working out in the woods now don't have that." Estate Manager

Skill deficiencies were also perceived at other levels. Significantly, managers were criticised for lack of people skills and 'business' skills:

"A lot of these guys have got no training at all in running a small business and I know that, simply on that basis that they are flying pretty close to the wind." Estate Manager

It could be argued that the largest barrier to in-career training in any organisation is cost.

"The industry wants the improvements that training can bring. The trouble is we have set standards that we can't pay for!" Forest Manager

"The training on the job issue needs to be addressed. Money in the industry is so tight that training has had to be neglected as though it is a luxury we can do without." Forest Manager

5.3.2 Developing A Positive Attitude To In-Career Learning

Apart from the in-forest professionals, there is widespread cynicism about in-career technical certification training.

On the whole, forestry people are practical people who like to 'get on with the job'. Time spent training and planning is not necessarily seen as productive. So, if organisations focus on training at all it is likely to be in terms of obtaining the certificates which are required by legislation (commonly referred to as 'tickets'). Most training beyond that concerns learning technical skills required for day-to-day work.

Management skills, leadership skills, supervisory skills, strategic skills, people skills and so on are often not considered important.

As discussed earlier in this report, traditionally many people learned forestry skills 'on the job'. The regulatory process has stopped this route and many see the certificates as a poor substitute. This provides the context for the negative attitudes to the control which the certification system applies to many forestry workers. Training is primarily not seen as a means of increasing skill but rather as an arm of the authority process imposing red tape, regulation and cost.

"Training and trainers are generally looked on as people who rip off the workers in the industry." Establishment Contractor.

Perhaps the optimistic view is that:

"The spirit of the ticket system is right, it's the implementation that's wrong. It needs sorting out." Forest Manager

As the cynics see it, the only people who benefit from such training are those who provide it.

"Trainers are often ineffective and even negligent." Establishment Contractor.

There is evidence that this view may well be founded on experiences accumulated fairly early on in the rollout of the certification schemes and that trainers are far more thoroughly assessed currently than in those early days.

"There used to be an issue with the quality of training and assessment of trainers. I really don't think that is an issue now. If people could see the amount of work that goes on to ensure good standards, I think they would change their minds." College Trainer/Lecturer

"I think that standards are getting higher and higher for trainers to keep their certification." Education Manager

The negative attitude towards training at a technical / craftsperson level is not restricted to those job roles. Part of the problem may be to do with the attitude of managers to the development of their workforce.

"One issue with 'bad management' for us is that when we talk to managers about the kind of training they need, they often don't have any idea. Training is pretty low on their list of priorities. A lot of it is poor planning by owners and managers." Trainer

Whatever the facts, it is clear that, at the very least, there is something of a PR issue for the training providers.

5.3.3 Bridging the gap between 'trained' and 'productive'.

It is true that in many industries, not just forestry, it is difficult and expensive to bridge the gap between what the education process produces and what employers need. This widespread economic issue is particularly significant in forestry because of the financial circumstances of many employers, the predominance of small businesses and the expense of the training process in certain sectors, particularly those connected with the forest floor.

Some sectors do not have serious problems. The training pattern for 'in-forest professionals' such as Forest Managers and Education/Training workers involves relevant full-time training and being nurtured through an experience gathering process. This seems to work well. We were also made aware of Wildlife/Recreation/Conservation workers who, though qualified, had to demonstrate their commitment with voluntary work and are now in paid employment and managing their own experience development.

The training for craft level Wildlife/Recreation/Conservation jobs seems to work as a foundation process, for example,

"When someone comes to me with a level 1 Deer Management qualification at least I know he's safe and can identify species of deer. It gives you the basics and it shows enthusiasm." Deer Stalker.

However the industry does have a serious challenge to face. Closing the gap is difficult for the colleges which are inadequately resourced and difficult for the employers who are under huge price based competitive pressures.

5.3.3.1 The challenge for the trainers

Within the 'in-forest technical' sectors, there are serious reservations about formal full-time training as a route to employment. The general feeling is that college-based training does not produce people who are 'fit for purpose'.

"I come across youngsters who've got a ticket in two weeks. What has that taught them? There is too much emphasis on selling the ticket, not enough on making people employable." Ground Prep Contractor.

To a degree, this is a point conceded by the colleges themselves

"The better machine-trained guys are coming out with an ability to work at 50-60% of the capacity that the contractors are looking for." Education Manager

The reasons for this situation are various, although many are related to financial constraints. Probably the principal factor is the high cost of the machinery in terms of purchase, rental and maintenance costs.

"When you give someone a price for some training it might just be affordable, but when you add in the cost of the machine at £50 an hour, that just blows them away. Smaller companies just can't afford it and there's just no funds." Trainer

The colleges are given too little money to allow students sufficient time using equipment to enable them to achieve the level of competence that the employers say they need.

"I spent only 19 hours on old and unreliable machines during a 27 week course." Mechanical Harvester

"Given the current financial constraints on us, the best we can do is turn out safe, partially productive people after the 28 weeks of training." Education Manager

"The money we get for each student is the same for a planter as for a harvester – there's no allowance made for the much larger costs of the machine you need for the harvester. We can just about keep a few old machines together but it's a big problem." College trainer/lecturer

A knock-on effect of this is that the practical training can only be given at what many feel at too simplistic a level:

"The set-piece exercises are inadequate preparation for the real world. I learned more in my first week on the job than the on the whole of the course." Mechanical Harvester

Another criticism levelled at the quality of people leaving college courses is that 'graduates' are not necessarily aware of what the real 'work' will be like and often don't last long in the industry after entering it.

"You've got to get people that's interested in the job – most people that's shoved into it because it's a means to an end. The colleges are just bums on seats. They don't give a damn whether you're interested in the job or not." Forwarder operator

"Ideally you would screen people before you sign them onto a course but there's no real testing. How do you test stick-abilty and who's responsibility should that be?" College trainer/lecturer

Or, on a related issue, that they may come out with an unrealistic understanding of their own competencies:

"I've come across people who've just left college and think they can set themselves up in business. The college encourages them. They have no experience and they are dangerous! The tickets were supposed to stop cowboys but they can actually encourage people to think they are competent when they aren't. The colleges shouldn't oversell their courses." Arboriculturist.

5.3.3.2 The role of the Employers

The colleges would argue that producing fully productive employees is an unreasonable expectation, given their financial constraints, but the problem for employers is that they also cannot afford to close the gap between foundation training and professional competence.

A positive attitude to the inevitable requirement for a learning curve after training is not a luxury which the 'in-forest technical' sectors, such as Harvesting and Establishment & Drainage, can afford. For them the gathering of on-the-job experience is problematic.

They too are under considerable financial pressures and, in their case, are often not in a position to absorb the loss of earnings that would inevitably occur if they put a partially productive college 'graduate' in a machine costing, maybe, a third of a million pounds.

"It might take me a year to get someone competent and up to speed. During that time one of my best men will be less efficient because they are having to coach. It makes no economic sense for me to do it." Ground Prep Contractor.

"If a contractor tried to build an amount into the price to cover training they would be out-priced by someone else. It's the lowest price that gets it, not the best employer." Forest Manager

Recently introduced regulations regarding supervision of new recruits have compounded the problem for the employers.

Also, a scarcity of skilled machine operators means that for some employers, there is too much of a risk that money invested in training up a new operator will be completely wasted.

"Why would an employer train anyone? There's no loyalty. A contractor can train someone up. Then they just leave." Forest Manager

5.3.3.3 Collaborative Initiatives

With both the training bodies and employers individually struggling financially to provide training in certain technology-intensive sectors, there are some imaginative schemes being developed to try to share costs. It is not the remit of this survey to go into these in detail (and in any case, some are at very early stages of development) but it would seem that they have great potential for bringing new people into key production jobs if they can attract a realistic level of funding.

"We get a lot of support from the FC who pay us to harvest their timber for a commercial fee." College trainer/lecturer

"We want to identify some young people before they start their VQ2 and put them to the industry and invite them to take them on and we will train them – a kind of 'incubator' approach. Hopefully this will reduce the gap between when they leave college and when they become fully productive workers." Education Manager

The Modern Apprenticeships would seem to be a particularly fruitful area of effort (at least for the larger organisations), although they are faced with an array of significant challenges:

"The last time we had 2 posts for modern apprenticeships and had 60 applicants!" FC Trainer

"A big problem is that Modern Apprenticeships are only available to employed people - not the self-employed." Forest Manager

"MA in Scotland is a poor relative of the English version because there is less money being put into it." College trainer/lecturer

"With MAs and the private sector, I think the will is there but maybe not the money. It needs to be backed up with funding." FC Trainer

In spite of inadequate resources the colleges have striven to rise to the challenge and qualified and 'entry-level competent' youngsters can be found. Employers may prefer experienced and proven workers but they will have to pay for them.

"50% of our students are career changers many of whom are over 25 and have to forego income to attend. That shows commitment!" College trainer/lecturer

"Any of our guys coming off a two-year course will get work. Our issue is more that our resources limit the amount of students we take in and limits the gaps we can fill in the industry." College trainer/lecturer

6. Concluding Thoughts

The primary purpose of this survey is to add to the understanding of the human resource which policymakers can draw upon when seeking to guide the industry.

This report is not a consultancy document, however it may be helpful to conclude by initiating a 'brainstorming' process focusing on 'Key Strands of HR Strategy for the Forest industry'.

To set the scene we should point out that we see strategy development as essentially a 4 stage process:

- 1 Deciding Where We Are Trying To Get To - creating an inspiring vision which all can understand and work towards, developing clear goals whose achievement will help to bring the vision closer.
- 2 Clarifying Where We Are Now - the classic techniques are SWOT (Strengths, Weaknesses, Opportunities, Threats) analysis and PEST (Political, Economic, Social, Technological) analysis but there are many others.
- 3 Generating A Long List Of Strategic Options - projects which may be undertaken in pursuit of the goals. These may arise out of SWOT or PEST analysis but more creative techniques for identifying possibilities can be useful.
- 4 Deciding On The Short List Of Strategic Initiatives To Be Taken - this requires that the Long List be filtered down - usually by comparing the likely benefits, costs, difficulties and risks involved in each potential project.

The survey reported here has added to the second stage of strategy development. It shows some clear strengths and some notable weaknesses and threats which will not be repeated here. Our start to the brainstorming process was aimed at drawing out some ideas from the study about possible candidates for the Long List. This process needs to be continued by policy makers within the industry.

Each general idea expressed would need to be focused on particular sectors or groups of sectors so may involve several projects.

MOTIVATION

Address the factors which are not working - especially pay (primarily in Manual Harvesting, Ground Prep, Establishment & Maintenance and Plant Supply & Maintenance) and opportunities to progress (many sectors).

DISSATISFACTION

Address perceptions about 'Bad Management', 'Red Tape' and 'Long Hours' (Low pay and poor opportunities having been addressed above).

MANAGEMENT

Have to do something about supervisory skills in some sectors - also organisational structures and job design.

Encourage and reward IIP even for small businesses - view favourably when awarding contracts.

Foster management skills - Strategic Planning, Costing, Project Planning, Work Scheduling, People Skills (e.g. teambuilding, interpersonal skills, conflict handling, dealmaking)

How about a Forest Industries Management/Leadership Programme for certain key individuals - should include a project which involves them developing the people side of their organisation.

RECRUITMENT

Focus on the sectors detailed in the report as having particular problems.

Expand investment in current schemes taking the Forest Industries into schools to raise awareness of career opportunities. (Look at what Royal Highland Education Trust is doing in schools to encourage interest in food and farming - Forestry equivalent?)

How about a Forest Industries Career Development Programme - perhaps with 3 levels of development.

BUSINESS TO BUSINESS

Create a culture where quality is as important as price.

Lack of concern for suppliers' business - its ability to train, to comply with regulations, its ability to forward plan and achieve reasonable profitability.

TRAINING

At least in sectors working on the forest floor, gather specific information on the characteristics of training (cost, delivery location, duration etc) that would be viewed favourably by potential trainees and employers

Find money for better training provision at colleges.

Get away from the 'regulation' mentality

Create schemes to help employers train

'Encouragement' - e.g. award contracts to those who can show that they are training staff not just on cost

Work at an industry culture which encourages (and a structure which facilitates) - learning and career development

CONCLUSION

No doubt those with leadership responsibility in the industry can add to our long list. The task of developing and successfully implementing a short list of effective strategic projects to improve the people side of forestry has to be a priority.

Appendix A Barfil Team CV's



Bob Lee BTech., MSc.

Director. Formerly Personnel Manager with Plessey Telecommunications. Subsequently Research Fellow, Lecturer and then Senior Lecturer in Organisational Behaviour, School of Management, Loughborough University. Bob has conducted several major research projects on subjects as diverse as 'The Effects Of Flexible Working Hours', 'The Impact Of Information Technology on Management Accountancy' and 'The Promotion Process In Banks'. He has published 23 refereed papers and two books.

Bob and his wife own Barfil Farm on which they planted 140 acres of hardwoods in 1992.

They have attended a Farm Woodland Management course at Newton Rigg.

Mark Smither BSc., PGCE

After gaining a degree in Psychology and Physiology, Mark spent 7 years working in advertising and marketing in London. He then moved to D&G and bought a hotel which he ran successfully for six 6 years. He has been working at Barfil Management Centre for the last 8 years.



Mark and Bob were heavily involved as consultants in the SEDG Recruitment & Retention Project. In 2003, following an interview based research project, they wrote a report 'Retention & Recruitment of Consultants in D&G NHS'. They have conducted training for forestry contractors in Business Strategy Skills, Dealmaking, and People Management Skills. They are currently being funded by SEDG to assist a forestry contractor who won a 'Young Entrepreneur' award in the development of his management skills and his business strategy.



Sandra Lee BSc., MSc., PhD

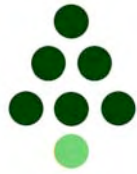
Sandra is proposed as the part-time research assistant for the project. She is a social psychologist and an experienced researcher who is up to date with questionnaire analysis using SPSS (Statistical Package for Social Sciences) and interview transcription and analysis techniques. She is currently employed half-time as a Research AAssociate at Loughborough University.

Dr Holly Blake

is a Chartered Psychologist and Lecturer at the University of Nottingham. She is an experienced researcher with a track record of publication and currently teaches research methods and analysis. She has several postgraduate qualifications and has previously worked in industry in marketing and market research.



Appendix B Questionnaire



A survey of people in the forest industries

This is your chance to influence key decisions in the South Scotland Forest Industry. Our industry is undergoing major changes and we need information from you to help us understand what is happening.

You have received this survey because all or some of your work is in the Forest Industry. It should take about ten minutes to complete and the information you give is confidential. Please return your completed questionnaire by post, or to your employer, in the enclosed FREEPOST envelope within 10 days. If you have any queries or comments about this survey, please contact Mark Smither on 01387 266118, or email to forestry@dial.pipex.com.

About your current work (*you personally, not your staff / contractors*)

This section is about your work in the Forest Industry **over the last year**

1. Where has your Forest Industry related work been located in the last year? (*Please give an approximate percentage for each region*)

Dumfries & Galloway		Borders		Ayrshire		Other		Total	100%
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2. How much of your total work time was spent in the Forest Industry in the last year? (*Please tick one*)

Less than a quarter (0-24%)		Quarter to half (25-49%)		Half to three-quarters (50-74%)		Three-quarters to all (75-100%)	
--------------------------------	--	-----------------------------	--	------------------------------------	--	------------------------------------	--

3. Which of the statements below best describes your *pattern* of work in the Forest Industry in the last year? (*Please tick one*)

Continuous		Occasional (inc. seasonal)	
------------	--	----------------------------	--

Continuous= No voluntary breaks of over one month in Forest Industry related employment.

Occasional (including seasonal) = Lengthy periods of time (i.e. more than one month) voluntarily not working in the Forest Industry.

4. What kind of Forest Industry work do you do? (Please state)

Job title / description

5. Which of the categories below best describes the forestry job on which you spend *most of your time*? (Please tick one)

Management <i>E.g. Forest/Business/Harvesting/Conservation manager</i>	<input type="checkbox"/>
Machine Operator / Technical <i>E.g. Lorry/harvesting equip/plant/chainsaw operator</i>	<input type="checkbox"/>
Manual Technical / Craftsman <i>E.g. planting/weeding/fencing/maintenance operations</i>	<input type="checkbox"/>
Admin / Clerical	<input type="checkbox"/>
Other (please specify)	<input type="text"/>

6. Which of the categories below best describes the main forestry sector in which you work? (Please tick one)

Tree Nurseries	<input type="checkbox"/>
Ground Preparation, drainage & road building/maintenance	<input type="checkbox"/>
Establishment & maintenance operations (manual)	<input type="checkbox"/>
Arboriculture	<input type="checkbox"/>
Wildlife/Recreation/Conservation	<input type="checkbox"/>
Plant & Machinery Supply & Maintenance	<input type="checkbox"/>
Harvesting - mechanical	<input type="checkbox"/>
Harvesting - manual	<input type="checkbox"/>
Forestry Management (<i>including consultancy</i>)	<input type="checkbox"/>
Education & Training	<input type="checkbox"/>
Haulage (<i>any Forest Industry related transport, inc. equipment transport</i>)	<input type="checkbox"/>
Timber Processing (<i>Sawmills, pulp/paper mills, panel manufacturers etc</i>)	<input type="checkbox"/>
Supplier of materials/services (<i>please specify</i>)	<input type="text"/>
None of the above (<i>please specify</i>)	<input type="text"/>

7. What is the nature of your employment? *(Please tick one)*

Employed (PAYE)	<input type="checkbox"/>
Self-employed	<input type="checkbox"/>

About your work history

This section is about your involvement with the Forest Industry during your whole working life so far.

8. When did you first start working / getting work in the Forest Industry?

(Please give an approximate year)

9. Since you started work in/for the Forest Industry, has the pattern of your involvement been: *(please tick one)*

Continuous	<input type="checkbox"/>	Intermittent	<input type="checkbox"/>
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Continuous: *No voluntary breaks of more than 12 months in Forest Industry related employment.*

Intermittent: *No whole years in which you did not work in the Forest Industry.*

10. How did you learn how to do your job?

(Please tick to indicate the level of importance of each option)

	Essential	Useful	Some use	Unimportant
Short courses	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Full time course	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Part time course	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
On the job	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Doing a different job	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other <i>(please specify)</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

11. Do you plan to do any training courses in the next two years?

No

Yes *(please specify by ticking the appropriate box(es))*

Short course(s)	<input type="checkbox"/>
Full time course(s)	<input type="checkbox"/>
Part time course(s)	<input type="checkbox"/>

12. How do you view the financial rewards for your work in forestry?

(Please tick one)

Good Adequate Poor

13. Do you expect the financial rewards per hour to change (in real terms) for your forestry work over the next two years? (Please tick one)

Increase Decrease Stay the same

Your Views

The following questions are really important to us – they do require some thought but any information you give would be very much appreciated. Most questions involve a list of possibilities but please don't hesitate to use the "Other" box if your views aren't specified.

14. Which of the following statements best describes how committed you feel to the Forest Industry?

(Please tick one)

It's just a job; I don't feel any commitment to the Forest Industry in particular	<input type="checkbox"/>
It's my 'preferred' industry; I would rather work in the Forest Industry than any other	<input type="checkbox"/>
It's my life; I could not imagine working in any other industry	<input type="checkbox"/>
Other (Please specify)	<input type="checkbox"/>

15. What was the most important reason for choosing the job which has brought you into the Forest Industry?

(Please tick one)

Through family influence/involvement in industry	<input type="checkbox"/>
Through friends/word of mouth	<input type="checkbox"/>
Interested in trees/forests/wildlife	<input type="checkbox"/>
Better pay/conditions than previous work	<input type="checkbox"/>
Interested in big machines	<input type="checkbox"/>
Company/boss took on forestry work	<input type="checkbox"/>
Other (Please specify)	<input type="checkbox"/>

16. What was your route into the Forest Industry?

(Please tick one)

Formal academic/technical course		<input type="checkbox"/>
Straight from school		<input type="checkbox"/>
Drifted in through other work		<input type="checkbox"/>
Crossed over from other work		<input type="checkbox"/>
Other (Please specify)		<input type="checkbox"/>

17. What are the best things about your work in forestry?

(Please tick two)

Freedom/being my own boss		<input type="checkbox"/>
Benefiting the environment		<input type="checkbox"/>
Variety of work		<input type="checkbox"/>
Being outdoors/in the countryside		<input type="checkbox"/>
The people		<input type="checkbox"/>
Seeing new places		<input type="checkbox"/>
Enjoying the challenges		<input type="checkbox"/>
Pay/rewards		<input type="checkbox"/>
Feeling part of the changing landscape		<input type="checkbox"/>
Work being appreciated		<input type="checkbox"/>
Opportunities to progress		<input type="checkbox"/>
Other (Please specify)		<input type="checkbox"/>

18. What are the worst things about your work in forestry?

(Please tick two)

	Weather	<input type="checkbox"/>
	Paperwork/red tape	<input type="checkbox"/>
	Bad management	<input type="checkbox"/>
	Physical demands	<input type="checkbox"/>
	Health & Safety risks	<input type="checkbox"/>
	Income insecurity	<input type="checkbox"/>
	Other people doing a bad job	<input type="checkbox"/>
	Insufficient pay	<input type="checkbox"/>
	Antisocial/long hours	<input type="checkbox"/>
	Lack of appreciation	<input type="checkbox"/>
	Lack of opportunities	<input type="checkbox"/>
Other (Please specify)		<input type="checkbox"/>

19. How could we encourage more people to come and work in the Forest Industry?

20. Do you expect to be in the Forest Industry in 5 years time?

Yes	<input type="checkbox"/>	No	<input type="checkbox"/>
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21. If you are thinking of leaving the industry, please tell us why?

Personal details

22. Date of birth: **Male / Female** (*please circle*)

24. No. of dependants: (*including children & non-working relatives that you support*)

WIN A BOTTLE OF FINEST MALT WHISKY!

To thank you for helping us with our study we have twenty bottles of whisky to give away. If you would like to enter the prize draw to win one of these, please complete your details below:

Name:

Address:

Postcode:

Preferred contact telephone no:

As part of this study we would like to interview a sample of the people who have completed this questionnaire. If you would be prepared to take part please tick this box. *Note: Your details will not be passed to any other parties*

If you would like to see a summary of the report please go to www.forestryscotland.com or tick this box and we will send you one.

Appendix C Pre QRE Interview Schedule

Interview Guidelines & Prompts

Hello and Introduction

Describe project:

1. What it is trying to do/find out
2. Why it is important to interview people
3. Why they have been selected.

Confidentiality of interview:

No names – even references to companies/people will not be in the report

Permission to tape

Sign form

Switch on tape:

<p>With regard to the increase in forestry work predicted over the next decade or so, how well set do you think South Scotland is to provide the necessary labour?</p>		<p><i>What prevents people coming to work in industry?</i></p>
<p>What are the other (non-labour) challenges facing the industry in the medium/long term?</p>	<p>Career path</p>	<p>Supplementary Questions</p>
<p>What are the hot issues talked about by people in the Forest Industry?</p>		<p><i>How can we encourage more people to work in industry?</i></p>
<p></p>		<p><i>Why do people leave?</i> <i>Why did you start working in forestry?</i> <i>How about the foreign labour option?</i></p>
<p>Where do you see the industry going?</p>		<p><i>What were your expectations when you started?</i> <i>Opportunities?</i></p>
<p>How do you regard the stewardship initiatives and how are they affecting your work in the industry?</p>		<p><i>Where did it go from there?</i> <i>Threats?</i></p>
<p>With regard to the increase in forestry work predicted over the next decade or so, how well set do you think South Scotland is to provide the necessary labour?</p>		<p><i>If positive: What would make you change / leave?</i> <i>If negative: What would make you stay?</i> <i>What would make you do more in forestry?</i></p>
<p></p>		<p><i>Will your business stay the same size?</i></p> <p><i>What political/economic/social/technological changes do you think will affect your work in the next few years?</i></p>
<p></p>		<p><i>Do you see any particular trends or problems</i></p> <p><i>What can be done by the Cluster to improve the prospects for the future?</i></p> <p><i>What pressures do you see on businesses in the industry in the foreseeable future?</i></p>
<p></p>		<p></p>
<p></p>		<p><i>What prevents people coming to work in industry?</i></p> <p><i>How can we encourage more people to work in industry?</i></p> <p><i>Why do people leave?</i></p>

Main Questions		Supplementary Questions
<p>Tell me how you view the financial rewards for your forestry work?</p>	<p>Pay & Conditions</p>	<p><i>Do you think you would get paid more in another industry?</i></p>
<p>What's the best thing about your forestry work?</p>		
<p>What's the worst thing about your forestry work?</p>		<p><i>Is this a career for you or a job?</i></p>
<p>In your experience, how good are the employers in the Forest Industry at managing their people?</p>		

Appendix D Sector 'Profiles'

The Establishment/ Maintenance Worker



Profile

AGE: 46

TIME IN INDUSTRY: 24 years

SELF-EMPLOYED?: Yes

ROUTE IN: I crossed over from other work

REASONS FOR COMING INTO FI: Interested in outdoor work and had family connections

COMMITMENT: It's my preferred industry but I would consider others if the money was right

PAY: It's a disgrace

FINANCIAL PROSPECTS: In spite of how bad it is now, I think it's going to get worse

BEST THINGS: I love being outside

WORST THINGS: Unusually not the paperwork! Poor pay and rotten weather get me down.

CHANCES THAT I'LL BE GONE

WITHIN FIVE YEARS: 26%

MY QUESTION FOR THE POLICYMAKERS:

My family connections drew me into the industry. Where will the next generation be found?

The Ground Prep/Drainage Worker



Profile

AGE: 45

TIME IN INDUSTRY: 17 years

SELF-EMPLOYED?: Yes

ROUTE IN: Crossed over from other work

REASONS FOR COMING INTO FI: I had connections in the industry and I was interested in outdoor work

COMMITMENT: It's my preferred industry

PAY: Dire

FINANCIAL PROSPECTS: The same as now, I think

BEST THINGS: Being outside

WORST THINGS: Paperwork, pay and other people not doing a good job

CHANCES THAT I'LL BE GONE

WITHIN FIVE YEARS: 21%

MY QUESTION FOR THE POLICYMAKERS:

We have other options for work. Can you pay us enough to keep us in the forest?

The Mechanical Harvester



Profile

AGE: 44 – quite young for forestry!

TIME IN INDUSTRY: 24 years

SELF-EMPLOYED?: No

ROUTE IN: Straight from school

REASONS FOR COMING INTO FI: Interest in nature and I knew a guy who could give me a shot on a big machine

COMMITMENT: More than most

PAY: Not so bad – if you are prepared to work long hours

FINANCIAL PROSPECTS: Set to get worse, I reckon

BEST THINGS: Being in the wide-open countryside

WORST THINGS: Bad management, the paperwork and the antisocial hours I have to put in to get a decent wage

CHANCES THAT I'LL BE GONE

WITHIN FIVE YEARS: 21%

MY QUESTION FOR THE POLICYMAKERS:

Why should youngsters come into this kind of work?

The Manual Harvester



Profile

AGE: 49 and the oldest in the forest!

TIME IN INDUSTRY: 28 years

SELF-EMPLOYED?: Yes

ROUTE IN: Straight from school

REASONS FOR COMING INTO FI: Family and friends in the industry

COMMITMENT: Not so much now, cos of...

PAY: ... bloody awful!

FINANCIAL PROSPECTS: err... more bloody awful?

BEST THINGS: I'm my own man – there's nobody
on my back (most of the time)

WORST THINGS: The paperwork – oh and the awful pay,
bad management and the weather!

CHANCES THAT I'LL BE GONE

WITHIN FIVE YEARS: 31% (One in three in 'old money'!)

MY QUESTION FOR THE POLICYMAKERS:

If you let us fade away, what will be the consequences?

The Arboriculturalist



Profile

AGE: Below the average - 44!

TIME IN INDUSTRY: 18 years

SELF-EMPLOYED?: Yes

ROUTE IN: Straight from school

REASONS FOR COMING INTO FI: Interest in nature

COMMITMENT: There's nobody more committed to the industry than me! It's my life

PAY: So so...

FINANCIAL PROSPECTS: Can't see anything changing much

BEST THINGS: Freedom and being outside

WORST THINGS: Bad management and paperwork

CHANCES THAT I'LL BE GONE

WITHIN FIVE YEARS: 24% - pretty average for the industry

MY QUESTION FOR THE POLICYMAKERS:

I want to work with trees, not paper! Is there anything you can do to cut down my paperwork?

The Tree Nursery Worker

Profile



AGE: The youngest in the industry – 41!

TIME IN INDUSTRY: 11 years

SELF-EMPLOYED?: No

ROUTE IN: I worked in another industry for a while

REASONS FOR COMING INTO FI: Interested in plants and nature in general and a friend told me about the job

COMMITMENT: It's just a job to me really

PAY: It could be worse

FINANCIAL PROSPECTS: Yeah, I think the money will get better

BEST THINGS: The fresh air and a variety of work

WORST THINGS: Red-tape and paperwork

CHANCES THAT I'LL BE GONE

WITHIN FIVE YEARS: 40% - the highest in the industry

The Wildlife, Recreation & Conservation worker

Profile



AGE: 45

TIME IN INDUSTRY: 18 years

SELF-EMPLOYED?: No

ROUTE IN: Crossed over from other work

REASONS FOR COMING INTO FI: Interested in the countryside and nature generally

COMMITMENT: It's the only industry for me

PAY: Not too bad really...

FINANCIAL PROSPECTS: I actually think my pay will get better

BEST THINGS: Being outside and the variety of work

WORST THINGS: Paperwork, bad management and the long hours

CHANCES THAT I'LL BE GONE

WITHIN FIVE YEARS: 12% - one of the lowest in the industry

MY QUESTION FOR THE POLICYMAKERS:

We are an important part of the future. Can you balance what we do and the need for production?

The Forest Manager



Profile

AGE: 47

TIME IN INDUSTRY: 24 years

SELF-EMPLOYED?: No

ROUTE IN: Full-time course

REASONS FOR COMING INTO FI: Interested in the outdoor environment

COMMITMENT: It's my preferred industry

PAY: Not bad I suppose...

FINANCIAL PROSPECTS: I'm pretty pessimistic on that one

BEST THINGS: Being outside (whenever I can!)
and a good variety of work.

WORST THINGS: The papaerwork! (I am unusual in the
industry in that I don't think the
management deserve a mention here)

CHANCES THAT I'LL BE GONE

WITHIN FIVE YEARS: 9% - the lowest you will find

MY QUESTION FOR THE POLICYMAKERS:

We've been here a long time, we're pessimistic about future rewards but we are not going anywhere. Is that OK?

The Educationalist/ Trainer



Profile

AGE: 53 – the oldest in the industry, unfortunately!

TIME IN INDUSTRY: 31 years of experience

SELF-EMPLOYED?: No

ROUTE IN: Full-time course

REASONS FOR COMING INTO FI: An interest in the countryside

COMMITMENT: Average I guess...

PAY: Mustn't grumble

FINANCIAL PROSPECTS: My view is that it'll stay about the same

BEST THINGS: The variety of work

WORST THINGS: The paperwork – and I have to put up with some pretty bad management

CHANCES THAT I'LL BE GONE

WITHIN FIVE YEARS: 14% - very low in industry terms

MY QUESTION FOR THE POLICYMAKERS:

We are comfortable and ageing. Are you looking to us to produce ideas for innovation and improvement?

The Haulage Worker

Profile



AGE: 45

TIME IN INDUSTRY: 18 years

SELF-EMPLOYED?: Nope

ROUTE IN: Well, I got into haulage through a family connection, then the boss started getting a lot of forestry work and it suited me...

REASONS FOR COMING INTO FI: see above

COMMITMENT: Not really, if I'm honest....

PAY: Could be better, could be worse

FINANCIAL PROSPECTS: I'm pretty optimistic actually

BEST THINGS: Being out on the open, forest roads
-sure beats rush-hour on the M6 !

WORST THINGS: Paperwork and bad work by others

CHANCES THAT I'LL BE GONE

WITHIN FIVE YEARS: 17% - pretty low

The Timber Processing Worker



Profile

AGE: 44

TIME IN INDUSTRY: 16 years

SELF-EMPLOYED?: No

ROUTE IN: Crossed over from other work

REASONS FOR COMING INTO FI: Heard about the job from a friend

COMMITMENT: None really. It's just a job.

PAY: Pretty poor

FINANCIAL PROSPECTS: Still pretty poor probably...

BEST THINGS: Variety of work

WORST THINGS: Bad management, poor pay and too much paperwork – in that order.

CHANCES THAT I'LL BE GONE

WITHIN FIVE YEARS: 18%

Appendix E Possible Useful Sector ‘Groupings’

The Technical In-Forest Workers

The Manual Harvester



The Mechanical Harvester



The Ground Prep Workers



The Arboriculturalist



The Establishment & Maintenance Workers



Technical Forest Floor Workers:

- have an average age of 46 which is quite old bearing in mind the physical aspects of the work.
- are self-employed, feel that they are poorly paid, and are pessimistic about future rewards.
- between 20-30% intend to have left the industry within 5 years.
- feel that the best thing about the industry is being outside in the countryside and the worst things are the paperwork and pay.
- tend to have come into the industry from school (a long time ago) or via another industry.
- chose the FI because of an interest in nature and/or family connections in the industry.

Exceptions:

The **Manual Harvesters** are older than the rest and have a greater length of service and are most likely to leave the industry in the next five years. The best thing for them is 'freedom' and the worst is pay. They tend to have come straight into forestry and stayed.

The **Mechanical Harvesters** are the ones in the group most likely to be 'employed' and a little more positive about their pay level. They are particularly committed to the industry. They are unhappy about the antisocial hours they do and are least likely to have come into the industry via a family connection.

The **Establishment and Maintenance** workers are the only sector in this group who didn't cite paperwork as the 'worst thing'.

The **Ground Prep** workers are not as pessimistic about future pay as the others. They put 'bad work by others' as a pet hate.

The **Arboriculturalists** are a little happier than the others about their pay – both current and future. 'Freedom' is a 'best thing' for them and 'bad work by others' a 'pet hate'. They are less likely than the others to have family

The In-Forest Professionals

Educationalist/ Trainer



Forestry Manager



Wildlife, Recreation & Conservation Worker



The In-Forest Professionals:

- Are predominantly PAYE
- Are more satisfied with their current pay levels than the other sectors
- Are least likely to be leaving the industry in the next five years
- Are the oldest 'tribe'
- Feel that the best thing about the industry is the variety of work
- Entered the industry because of an interest in nature
- Cited paperwork as the worst thing about their work

Exceptions:

The **Education & Training** workers differ from the others in that

- they are significantly older and have spent longer in the industry
- don't think that working outside is one of the best things about their job, and
- cite bad work by others as one of the worst things about their jobs.

The **Wildlife, Recreation and Conservation** workers stand out because:

- are the youngest
- are the most committed
- they are optimistic about their future rewards
- didn't come into the industry via a full time course but 'crossed over'
- cite long hours as a 'worst thing'

The **Forestry Managers** differ from the others in that they are particularly pessimistic about future rewards

The Out-Forest Workers

Tree Nursery Workers



Haulage Workers



Timber Process Workers



The Out-Forest Workers:

- Are mainly characterised by their low level of commitment to the industry and the fact they have entered the industry by crossing over from another industry
- Are generally optimistic about better financial rewards in the future (not Timber Processing)
- Think that paperwork, long hours and bad management are 'worst things'
- Came into the industry via friends or family connections

Exceptions:

The **Tree Nursery Workers** differ from the others in that:

- They are younger
- Have a particularly high intention to leave the industry within five years
- Think that their level of pay is one of the worst things about the job
- Unlike the others in this group, are likely to come into the industry in part because of an interest in nature
- Unlike the others, don't think bad management or long hours are 'worst things'

The **Haulage Workers** stand out because:

- Don't think that variety is the best thing – they think it's being outdoors
- Don't put pay as a worst thing
- Have a greater chance of coming into the FI because of an employer's decision

The **Timber Process Workers** stand out because they are less optimistic about future financial rewards