



**British
Association
Landscape
Industries**

LAY OF THE LAND

**BALI'S ANNUAL MEMBER
SURVEY RESULTS**

2026

bali.org.uk/lay-of-the-land-2026

BALI: LAY OF THE LAND REPORT 2026



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**BALI – Supporting,
representing and
accrediting the
landscape
industry**

About BALI

Formed in 1972, the British Association of Landscape Industries (BALI) represents the interests of approximately 1,800 member businesses and over 900 accredited members. Members include landscape contractors, suppliers, garden designers, arboriculturists, training providers, students and other related professionals.

BALI Lay of the Land Report 2026

Message from Wayne Grills, Chief Exec, BALI

I am delighted to be presenting the second edition of the Lay of the Land report, our flagship member survey which digs into the challenges and opportunities for our members and their businesses. The first edition of the report has been instrumental in our advocacy efforts and has been widely read and quoted by industry, government, and members alike. However, I am even more eager to share the results of the 2026 survey, as it will be the first time we have comparable results and can start to build a picture of long-term trends for the industry.

The past 12 months have brought no shortage of challenges, from a new Prime Minister to rising costs of energy, fuel, VAT, and a drought being declared across great swathes of the UK. Despite this, our members have continued to deliver quality landscaping projects and explore opportunities for their businesses.

This report confirms what we've always known to be true; the landscaping sector is wide-ranging and impactful across a huge breadth of social, economic, and environmental priorities. From house building to environmental enhancement and restoration, water management, community growth, local economic regeneration, skills and training and employment, tourism, and wider economic growth, our members are at the fore of some of the greatest challenges and opportunities across the UK, and we are proud to represent this industry.

I am extremely proud to see the work of the BALI team delivering results on the back of last year's report, to show an increase in business confidence for members and their businesses. The advocacy work undertaken by BALI on the issues seen within this report has supported a shift towards greater confidence and reduced concern around a myriad of policy topics. Of course, there are still clear challenges faced by the industry and so BALI will continue to engage meaningfully with all levels of government and industry to advocate on behalf of our members.



Introduction

According to an [Oxford Economics report](https://www.oxfordeconomics.com/wp-content/uploads/2024/11/10022-HTA-report_D8.pdf) on the economic impact of environmental horticulture and landscaping on the UK, the environmental horticulture and landscaping industry contributes £38bn to UK GDP and supports approximately 722,000 jobs. Landscaping services alone contributed £17.9bn to UK GDP in 2023. The real impact of the landscaping industry is likely even higher, as some landscaping activities are sometimes categorised as construction. Evidence from BALI and the Environmental Horticulture Group suggests that the environmental horticulture sector which includes the landscape industry could grow by 45% and be worth £51.2bn and support 763,000 jobs by 2030^[1].

Landscaping as a sector underpins the £6.6bn GVA garden tourism sector, which is responsible for a huge amount of international tourism. In fact, visiting gardens and parks was found to be the most common activity by international tourists when visiting the UK^[2]. Urban vegetation's role in removing harmful pollutants has been estimated at £800.5 million in avoided negative health impacts¹.

Beyond clear health and economic benefits, the landscaping sector delivers vital environmental and well-being benefits. According to research commissioned by Anglian Water^[3] surveying over 500 people, 90% of people agree that access to a garden is good for mental, physical, and social wellbeing, as well as being an essential part of a good quality of life. Further, 87% said it is important to have access to a garden that supports biodiversity. This factored so strongly for respondents that 82% said that environmental sustainability is extremely or moderately important when buying a house, and 38% would be willing to pay a premium of £10,000 or more for a climate resilient garden in a new house with a further 42% being willing to pay £5,000 or above. Clearly, the value added by BALI members is becoming more widely recognised, and it's imperative that government, housing developers, and local authorities follows this direction of travel by investing in quality landscaped spaces.

[1] <https://www.rhs.org.uk/science/pdf/ehg-green-growth-report-2024.pdf>

[2] https://www.oxfordeconomics.com/wp-content/uploads/2024/11/10022-HTA-report_D8.pdf

[3] <https://www.ewsc.org.uk/project-reports/climate-resilient-gardens>



Key results: confidence

Looking at Figure 1, we can see that business confidence has largely remained stable since 2025. A slight increase of two percentage points in businesses feeling very confident is a welcome reflection, particularly with the pressures of costs and weather that have been so significant this year. However, there was a slight increase in responses of those only feeling slightly confident (a 2 on the scale) with an increase of 5 percentage points from 2025.

Business confidence over the next 12 months
(1 is not confident at all, 5 is very confident)

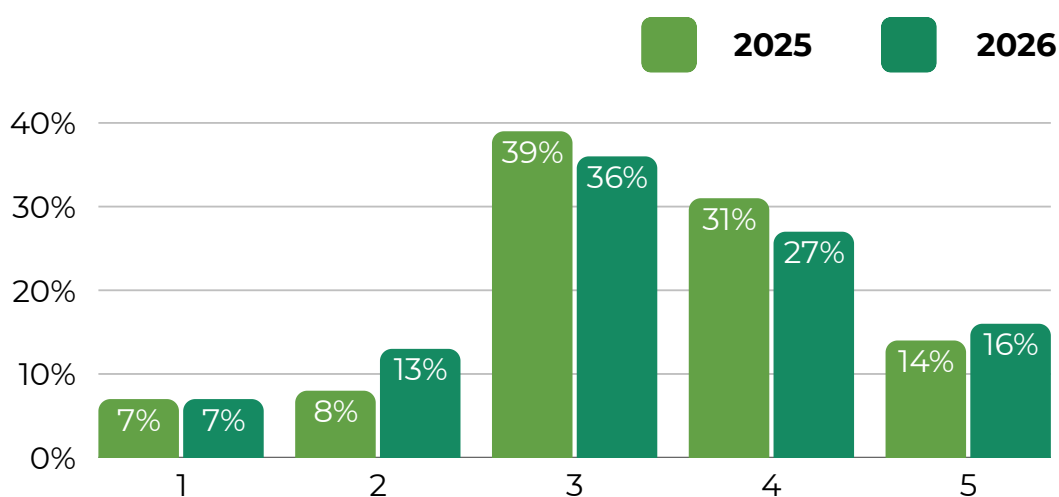


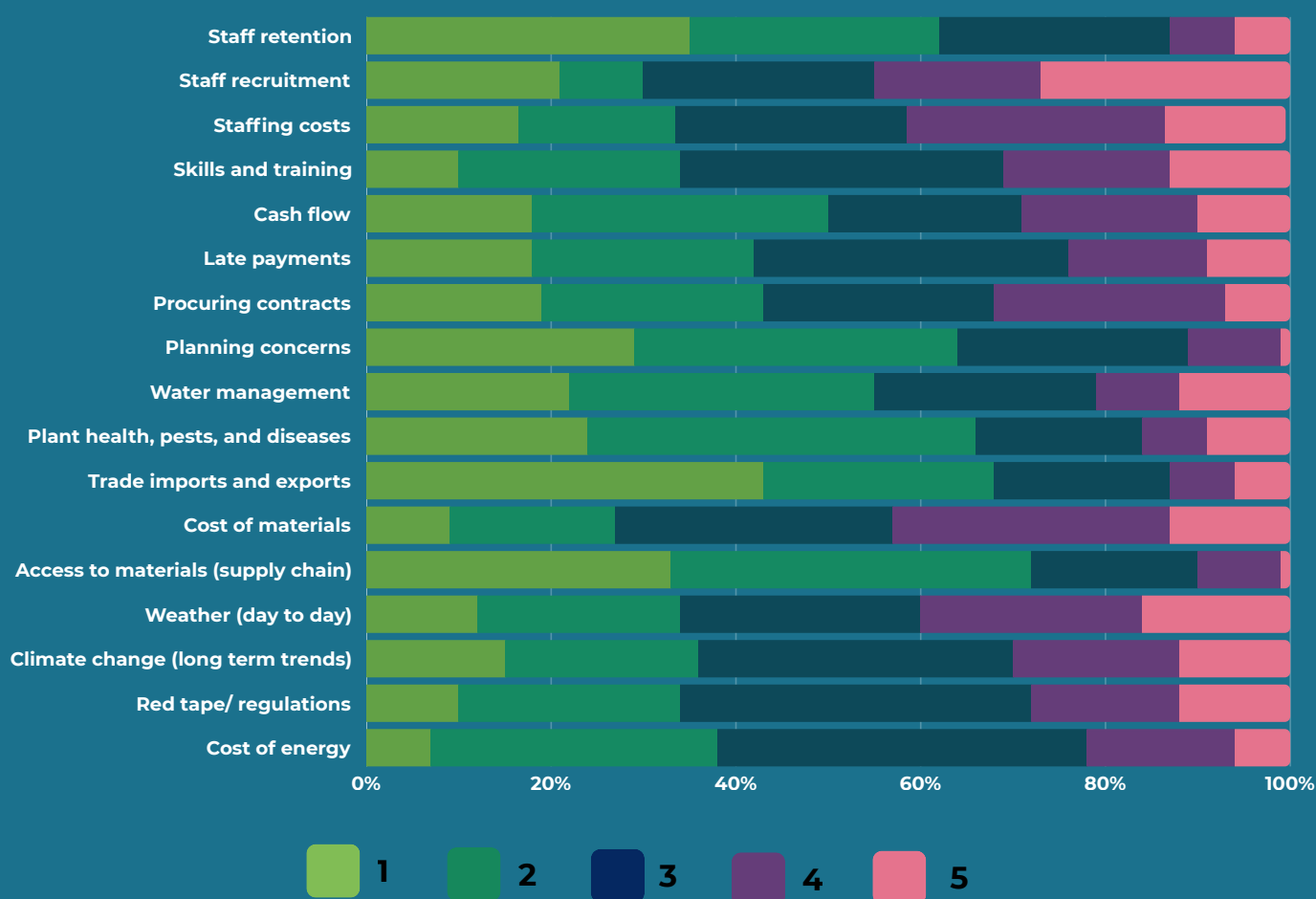
Figure 1

This increase in confidence is mirrored by the data shown in Figure 2. When comparing the responses of 2025 and 2026, only four areas had an increase in members finding them extremely challenging for their businesses. Interestingly, plant health including pests and diseases has increased in the highest level of concern for members, increasing 2 percentage points from 2025 up to 9%. The challenge of red tape also increased by 2 percentage points from 10% in 2025 to 12% in 2026, and trade increased from 5% rating it a 5 in 2025 to 6% in 2026.

The biggest increase in extreme challenges for members is water management, jumping from 9% finding it extremely challenging last year to 12% this year. This is an unsurprising increase as the lack of rain this summer has had negative ramifications for member businesses. Coupled with heavy and intense rainfall and flooding in the winter months and upcoming changes to abstraction licenses and water company reforms, BALI members are justifiably concerned about water management.

Key results: challenges

Level of challenge faced by businesses



*1 = not at all challenging, 2 = slightly challenging, 3 = moderately challenging, 4 = very challenging, and 5 = extremely challenging

Figure 2

Challenges in the industry

When we look at Figure 2, staff recruitment continues to be the standout concern at 27%, a full 11 percentage points more members rating it 'extremely challenging' than the next topic of challenge (weather at 16% rating it a 5). Skills and training and staffing costs also rank highly on the list of challenges for member businesses, with 31% rating skills and training a 4 or 5, and 41% saying staffing costs are a 4 or 5.

Key results: skills and training

BALI members are working to address these concerns as seen in Figure 3, with 'per head' spend on skills training for staff. There is a clear acknowledgement of the challenges for the industry, and members are willing to invest in the industry and in upskilling and training.

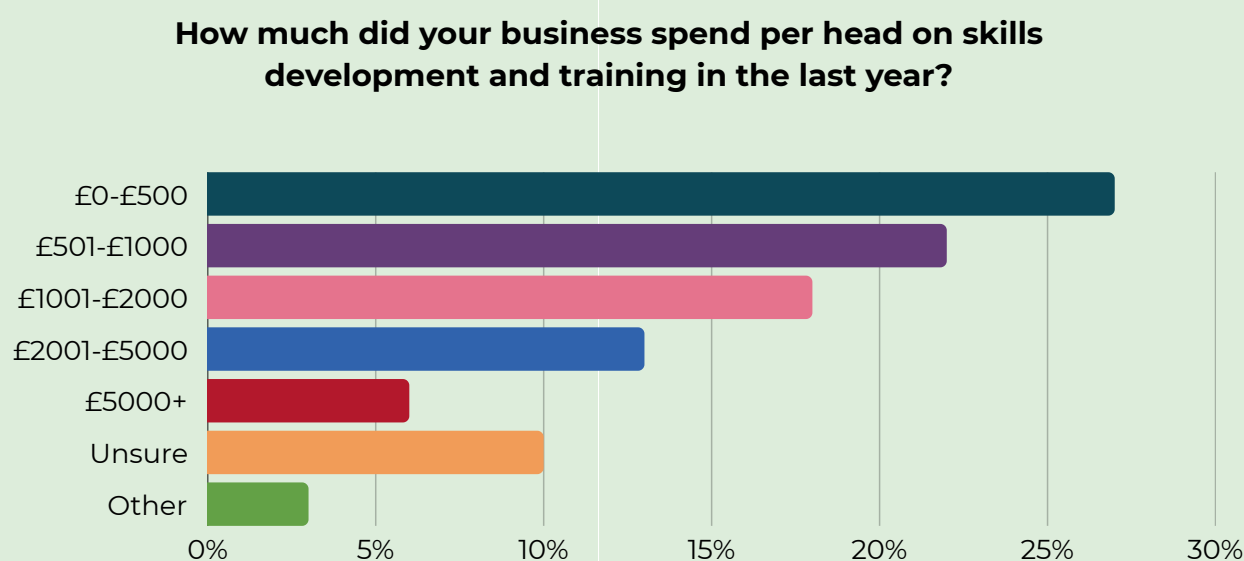
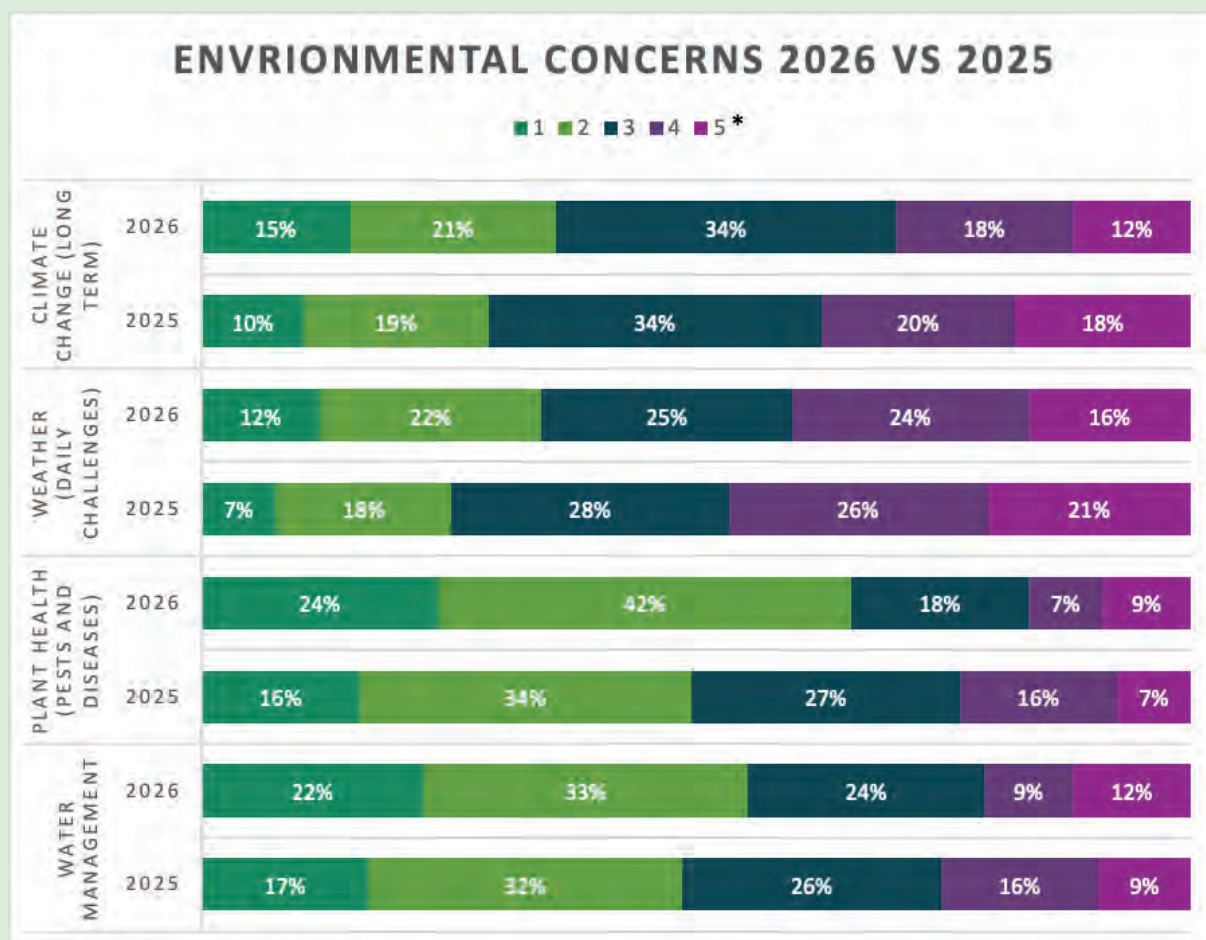


Figure 3

Beyond staffing, environmental considerations also rank highly for our members. Looking at Figure 4, the level of challenge presented by climate change and day-to-day weather have remained largely unchanged. Both plant health including pests and disease as well as water management have had more members rating it either side of the scale, with more saying they find it 'very challenging', while more have also rated a 1 or 2 on the scale.

This is an interesting change, as drought, flooding, prolonged periods of extreme heat, and other challenging climatic events have been more acute over the past 12 months, however, it may be down to members' preparedness. Whilst 2025-2026 has been a clear indication of the shifting trends in weather and climate; it is not the first time we've faced these challenges. As seen in Figure 4, there were similar concerns the previous year, and 4 out of 5 of the UK's hottest years ever recorded have been in the last 5 years[1]. The landscaping business has no choice but to begin to adapt to these challenges.

[1] <https://www.metoffice.gov.uk/about-us/news-and-media/media-centre/weather-and-climate-news/2026/2025-is-double-record-breaker-uks-warmest-and-sunniest-year-on-record>



*1 = not at all challenging, 2 = slightly challenging, 3 = moderately challenging, 4 = very challenging, and 5 = extremely challenging

Figure 4

Business opportunities

Figure 5 on page 9 supports the idea that members are leading the way in future-proofing their businesses against climate change. Over a quarter are exploring environmental delivery opportunities such as biodiversity net gain (BNG), sustainable drainage systems (SuDS), or other net zero projects. A further 40% are looking into new technologies and machinery which might include electric tools or newer products that increase efficiency and reduce inputs. One member responded they are doing “research into planting solutions for climate change”, showing the many ways our members are engaging in addressing environmental concerns.

While there are significant challenges for the sector, BALI members are still forward-thinking and exploring a wide range of opportunities for their businesses. In Figure 5, we see that most members are looking at new markets and contracts, increasing the work they’re taking on.

Key results: opportunities

Business opportunities BALI members are exploring over the next 12 months

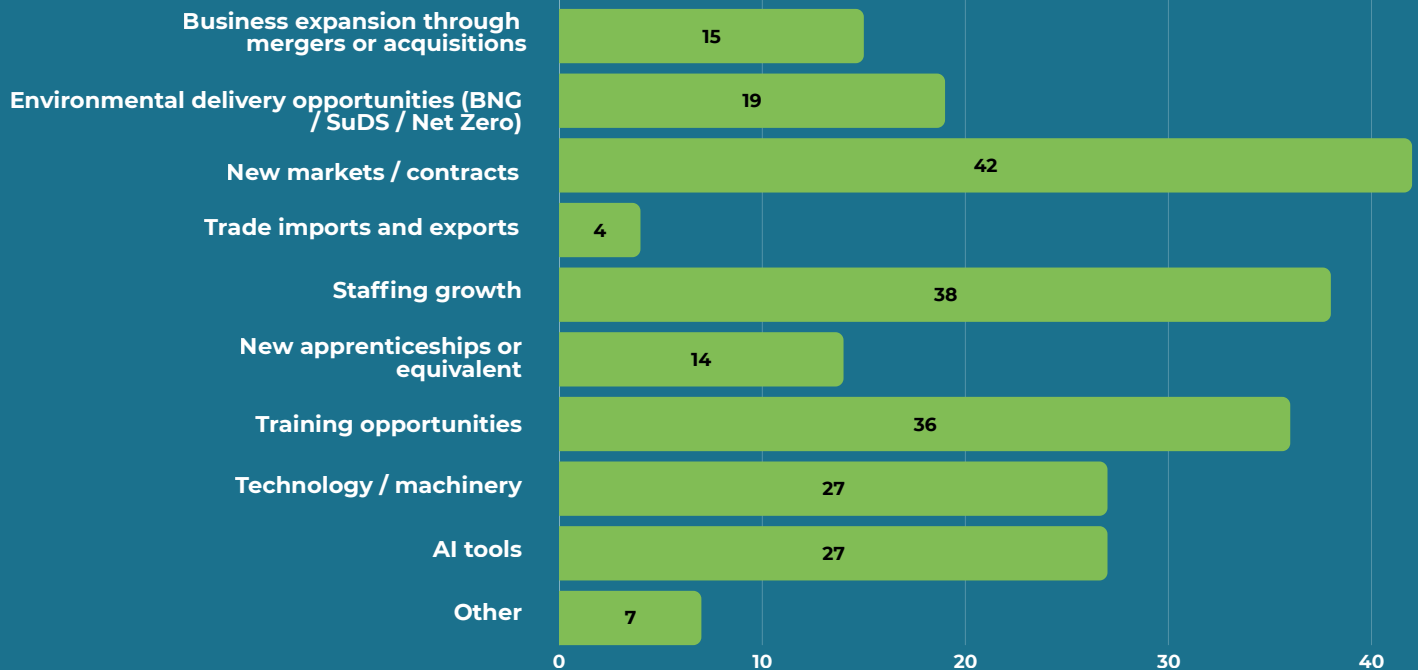


Figure 5

Use of AI



Figure 6

This echoes the increase in members feeling very confident in their business for the year (Figure 1). Staffing growth and training opportunities follow as the next most common responses, which is interesting as Figure 2 establishes it as an area for concern for most members. This shows that our members are actively trying to contribute solutions for this gap in skilled staff, through training and quality employment. With a further 21% investing in apprenticeships, it's clear that addressing the skills and employment shortage in the industry remains the priority for BALI members.

This year, for the first time, the survey included AI tools as an opportunity members might be wanting to explore, with 40% responding they are looking to explore AI for their business (Figure 5). With AI being of interest to our members, we wanted to delve into that interest, as seen in Figure 6. Nearly half of respondents (46%) are interested in how AI can support their marketing and social media.

BALI policy recommendations

This latest version of BALI's Lay of the Land Report has shown an increased level of confidence across the sector, with the industry looking to futureproof their businesses against a range of challenges, from climate change to employment and skills training, and economic pressures. Members are exploring innovative solutions from AI to upskilling staff and engaging with new markets. However, there must be a regulatory framework in place to support the industry in delivering these ambitions.

01. Government engagement

Government, both central and devolved, must engage meaningfully with industry across the full breadth of policies which impact landscaping including environmental policy, economic growth and prosperity, skills, training, and employment, horticulture and arboriculture, small business support, trade, planning and house building, and many other policies.



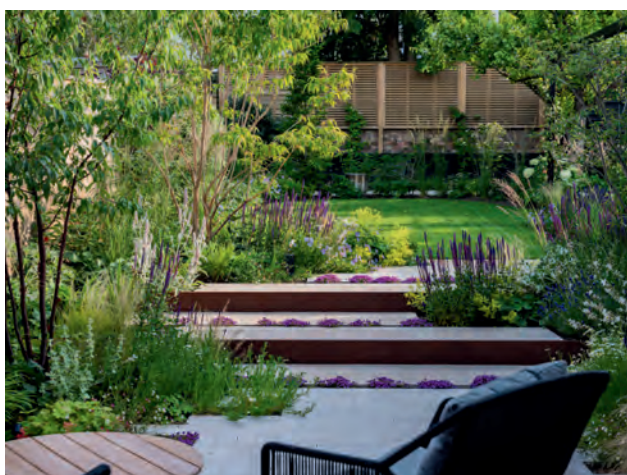
02. Access to funding

Landscaping businesses must be able to access funding support that government delivers for objectives including economic growth, environmental programmes, and social initiatives. Often these funding opportunities are too narrow in scope, or a lack of engagement with the industry means that there is not sufficient understanding of how landscaping can provide innovative and future-proofed solutions for many of the priorities of the government.

BALI policy recommendations

03. Early involvement

Landscaping projects need to be considered at the beginning of project development to ensure the highest quality projects which can deliver the most benefits for the client, environment, and wider community. Landscaping offers more than quality green and hardscaped spaces, and through early engagement, clients including local authorities can get the most from their projects.



04. Skills and training

Government must work with the landscaping sector to understand the distinct challenges our member businesses face and ensure that funding opportunities and programmes include the landscaping sector. The landscaping sector offers a wide-range of career opportunities but lacks the necessary support for specific skills training.

About the authors

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Thank you

Thank you to all BALI members who contributed to this survey. Your insights not only help strengthen the voice of the landscaping industry, but also ensure that government, policymakers, and the wider public understand the true value and impact of our sector.

By sharing your experiences, challenges, and ambitions, you are helping to shape a stronger, more resilient future for landscaping across the UK.

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