

The floristry industry comprises the following key activities: retail flower sales, creating floristry designs, delivery services and the use of flowers and decorative plants and related products for displays, events and public and private functions.

### Overview

Official statistics do not provide a comprehensive picture of the floristry industry. The Standard Industrial Classification (SIC, 2003) codes, which are commonly used to define business types in national data sources, do not distinguish floristry from other specialised retail businesses. However, florists and floral arrangers are recognised in Standard Occupational Classifications (SOC, 2000) under code 5496 (a skilled trade occupation). Although this methodology provides us with a best guess, alternative data sources provide a more accurate picture of actual business numbers. Therefore an additional estimate for the number of businesses sourced from eFlorist has also been used.

Lantra has worked successfully with the Office for National Statistics, the organisation responsible for the SOC definitions, to drop 'floral arrangers' from the codes' definition. This should come into effect for the next factsheet update early in 2012 and will give us a more accurate estimate of the size of the floristry industry.

### Business size

- Generally floristry businesses have a smaller than average business size; 94% have a workforce of ten staff or fewer, compared with 83% across all businesses in the UK.

	Floristry UK <sup>3</sup>	All sectors UK <sup>4</sup>
0-9 employees	94%	83%
10-49 employees	6%	14%
50-99 employees	<1%	2%
100+ employees	0%	1%

### Size and scope

The size and scope figures are Lantra's best estimates using official data sources, however, they over-estimate the size of the industry considerably.

Figures from eFlorist<sup>3</sup> give a more realistic picture of the number of businesses in the floristry industry eFlorist estimates that there are around 6,000 businesses in the UK.

Nation/Region	Businesses <sup>1</sup>		Employment <sup>2</sup>	
UK <sup>5</sup>	9,700	100%	14,650	100%
Northern Ireland	280	3%	150	1%
Scotland	800	8%	1,450	10%
Wales	420	4%	450	3%
England	8,200	85%	12,600	86%
East of England	260	12%	1,750	14%
East Midlands	220	7%	1,950	15%
London	80	16%	1,000	8%
North East	380	5%	300	2%
North West	1,080	13%	1,350	11%
South East	1,300	16%	1,950	15%
South West	860	11%	1,800	14%
West Midlands	900	11%	1,550	12%
Yorkshire and the Humber	800	10%	950	7%

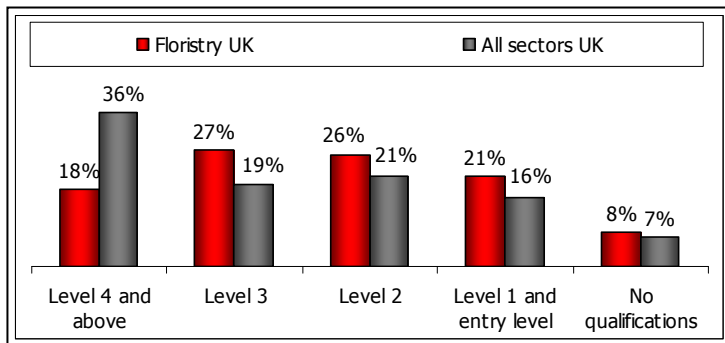


## Workforce demographics

Gender <sup>4</sup>			
Male	6%	Female	94%
Age band <sup>4</sup>			
16-24	12%	45-54	25%
25-34	21%	55-64	10%
35-44	32%	65+	<1%
Employment <sup>4</sup>			
Full-time	49%	Part-time	51%
Employee	70%	Self-employed	30%

## Qualification levels<sup>2</sup>

Workers in this industry are often highly skilled and experienced, but can lack formal qualifications.



- 7% of the workforce do not hold any qualifications, more than double the UK average
- The proportion of the workforce qualified to Level 1 is at the same level as for the UK at 17%
- The proportion of the workforce qualified at Level 2 is also around the same level as the UK average at one fifth of the workforce
- The greatest differences are at Levels 3 and 4. A much larger proportion of the workforce is qualified to Level 3 than the UK (35% compared to 20%). In contrast 21% of the workforce are qualified to Level 4 and above, 15% points lower than the UK average.

## Skills issues

### Skill shortages and recruitment

- When florists have come across recruitment difficulties they have tended to report a lack of 'practical floristry skills' as the main barrier
- Florists often have to look for potential or experience rather than qualifications, and have to take the responsibility to train their new starters
- Floristry businesses need multi-skilled recruits as employment numbers are typically low, due to the nature of small businesses.

## Learning supply

- An estimated 4,940 learners enrolled on qualifications or courses delivered by FE colleges/work-based learning in floristry related subjects in the UK in 2008-09 <sup>7</sup>; ranging from professional qualifications to leisure courses.
- Popular qualifications until 2010 include the National Certificate in Floristry (superseded by the Diploma) and the BTEC First/Advanced National Diploma in Floristry
- Although a BA (Hons) in Floristry Design is available at Higher Education Institutions in the UK, data on uptake is not available.<sup>8</sup>

## Drivers for change

### Economic conditions

- Impulse sales of cut flowers have move to internet businesses/supermarkets. Bespoke floristry designs are created by the retail floristry shop
- Greater consideration of environmental impacts has resulted in the use of more expensive biodegradable products
- As with retail businesses, evidence suggests that there has been a general decline due to economic conditions.

### Impact on skills

- The need for business training in retailing/commercial awareness/maximising profits, customer care, risk analysis and marketing.



## Competition

- Small businesses in particular are under threat from severe competition generated by flower sellers including:
  - Alternative services, such as delivery of boxed flowers, are available via the internet
  - Supermarket chains with in-store floristry products. Given the bulk in which these supermarkets purchase, they can easily undercut the traditional retail flower seller
  - Relay companies - as not all orders are executed through floristry shops.
- In addition, new businesses that start up get funding and in turn have super websites, therefore affecting existing businesses. There is no help for existing businesses.

## Impact on skills

- The need for business training in retailing/commercial awareness/maximising profits, customer care, risk analysis and marketing
- With the increasing reliance on computers and the internet to secure and retain customers the demand for ICT skills is increasing.

## Globalisation

- Affects the daily performance of businesses primarily through changes in global economic and social conditions (e.g. oil prices, fluctuating exchange rates, carbon footprint)
- Seasonal variations will impact on availability of different flowers which may be more readily available from other countries
- More and more plants and flowers are available from all over the world.

## Impact on skills

- Need up-to-date knowledge on new varieties of plants and flowers and their uses.



## Climate change

- Climate change is likely to have an impact on species and plants and also on pest numbers/types and disease rates. Awareness of air miles and fair-trade products is also affecting changes.

## Impact on skills

- Need to improve sustainability skills, increasing accountability (e.g. lower carbon emissions, use of bio-degradable products, reducing waste, recycling)
- Greater awareness and knowledge is required through CPD.

## Sources and information

- 1 Experian 2010
- 2 Labour Force Survey (LFS) 2009-10 (SOC 5496)
- 3 eFlorist 2009
- 4 Lantra Sector Skills Agreement for Floristry 2006
- 5 Figures and percentages may not add up due to rounding. Percentages are calculated from actual figures
- 6 Data Service (England), DCELLS (Wales), Skills Development Scotland (SDS), DARD/DEL (Northern Ireland)
- 7 Data Service (England), DCELLS (Wales), Skills Funding Council (SFC), DARD/DEL (Northern Ireland)
- 8 Higher Education Statistics Agency (HESA).

## Lantra website

For further information regarding this factsheet, Lantra and the sector, please visit: [www.lantra.co.uk](http://www.lantra.co.uk)



**Telephone 02476 69 69 96**

**[www.lantra.co.uk/research](http://www.lantra.co.uk/research)**

Copyright and disclaimer: This publication (excluding the logo and photographs) may be reproduced free of charge in any format or medium provided that it is reproduced accurately and not used in a misleading context. The material must be acknowledged as Lantra copyright with the title and source of the publication specified. Every reasonable effort is made to ensure the information is accurate and up-to-date.