



2022 Member Survey Results

Please note: Members have shared their information with FFTF freely so that we can monitor how the artisan cut flower market and our businesses develop over time. It's a great way for everyone to benchmark their own business performance and see these insights too. However, please note that this information is not to be referenced or published without the express written permission of Flowers from the Farm. To request permission to use information from this survey, please email the full text of your article with your proposed use of the statistics to chair@flowersfromthefarm.co.uk. Use of this information beyond the confines of our FFTF membership group without written permission to do so will trigger our formal complaints procedure as outlined on our website.

Background

This is the third iteration of the member survey (previous surveys were conducted in 2018 and 2020). The survey has remained largely unchanged to enable a direct comparison to previous years.

The following analysis and interpretation of the results is based on the responses received, which represent 44% of the membership.

Question 1: What is your Flowers from the Farm region?

44% (413) of the total current membership of Flowers from the Farm took part in the 2022 survey. In 2020 approximately 45% took part (428) and in 2018 approximately half took part (225). All regions engaged in the survey except Northern Ireland.

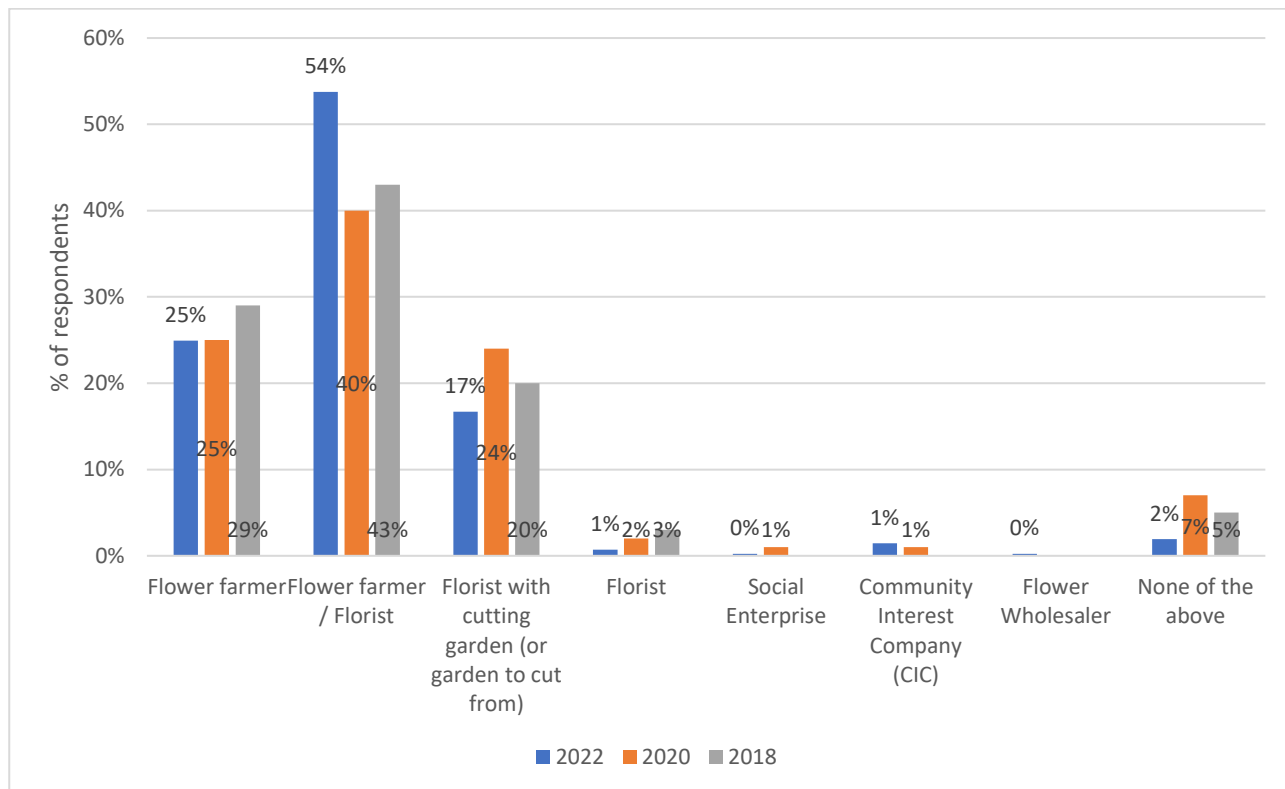
Answer Choice		Response Total	% Response	Membership Numbers	% of Membership Responded
1	Scotland	30	7.3%	68	44%
2	Wales	25	6.1%	58	43%
3	Northern Ireland	0	0%	7	0%
4	North East England and Yorkshire	32	7.7%	85	38%
5	North West England	33	8.0%	68	49%
6	East Midlands	39	9.4%	76	51%
7	West Midlands	51	12.3%	94	54%
8	East Anglia	37	9.0%	87	43%
9	South West England	96	23.2%	203	47%
10	South East England	69	16.7%	193	36%
11	I don't know	1	0.2%	n/a	n/a
		413		939	44%



Question 2: Which of the following describes you best?

The majority of those who completed the survey are 'Flower Farmer / Florists', an increase on previous years.

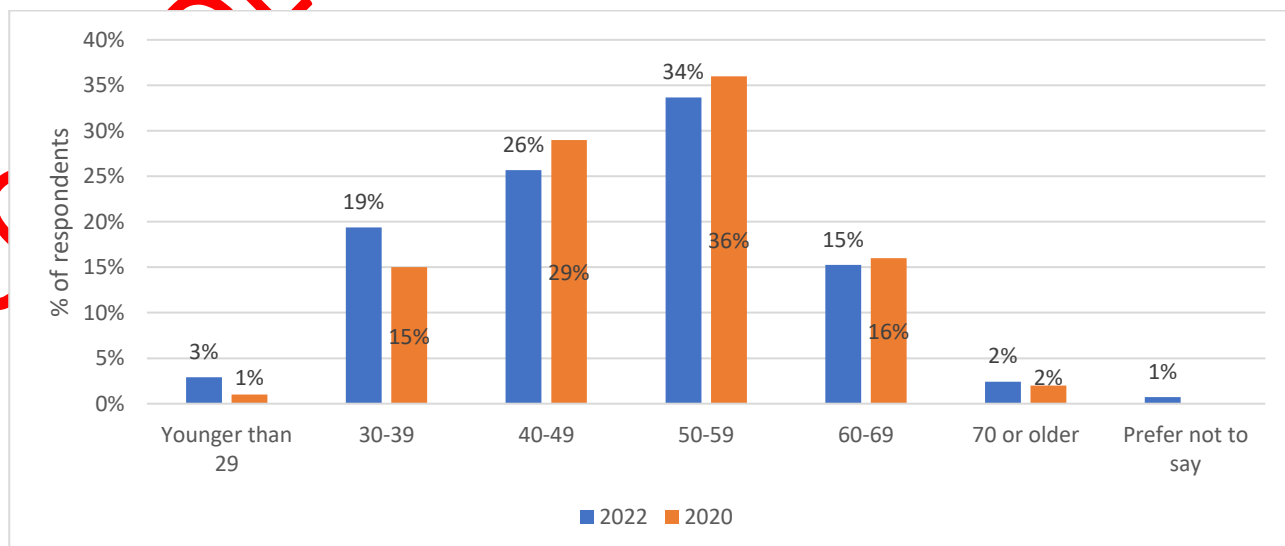
'Flower Wholesaler' was a new category added to the 2022 survey, 1 response was received against this new category.



Question 3: What is your age?

The age categories changed between 2018 and 2020 therefore it is not possible to make a direct comparison with the 2018 responses.

The survey indicates an increase in younger members (those aged under 40), 92 in 2022 compared to 74 in 2020. The majority of members continue to be in the 50-59 age group.



Question 4: What is your gender?

The majority of members responding to the survey continue to be female:

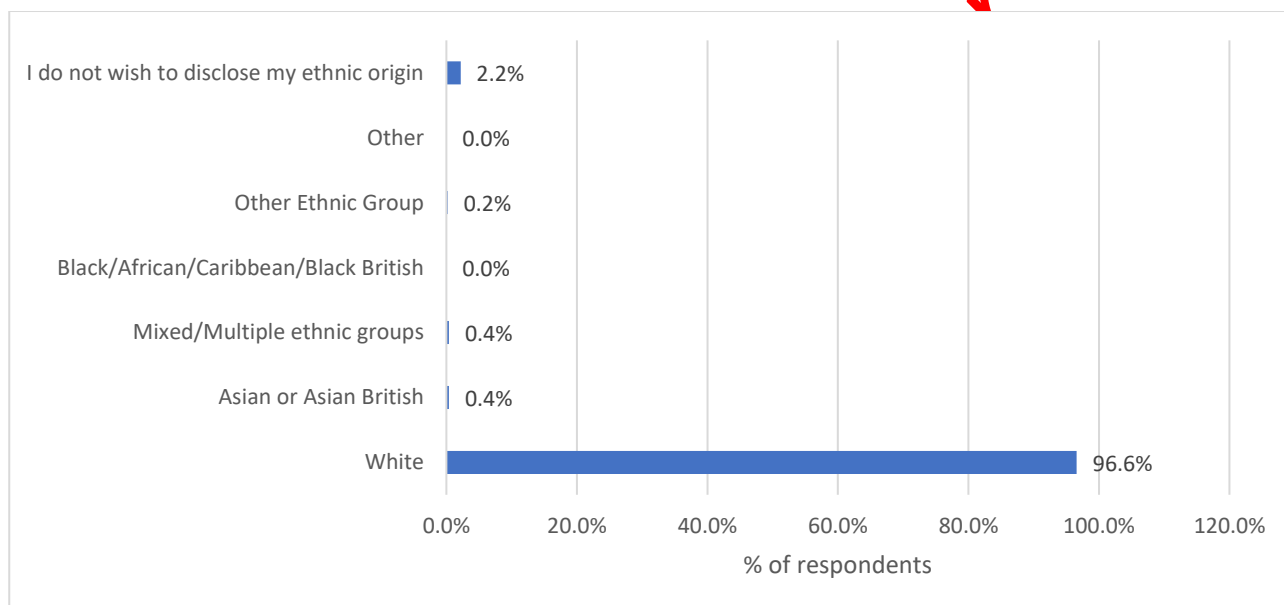
- 2022 - 97%
- 2020 - 96%
- 2018 - 94%

In both 2022 and 2020 we saw 12 survey responses from men.

Question 5: What is your ethnic group?

The Diversity Action Group was formed in 2020 with the aim to address how FFTF can welcome and encourage members of all identities. This year's results continue to indicate that more work is needed in this area.

The categories used in this survey are those used by the Office of National Statistics.



Question 6: Do you consider yourself to have a disability or serious health issue (mental or physical)?

	2022		2020	
	Response Percent	Response Total	Response Percent	Response Total
Yes	5.8%	24	4.9%	21
No	92.5%	382	94.2%	403
Prefer not to say	1.7%	7	0.9%	4

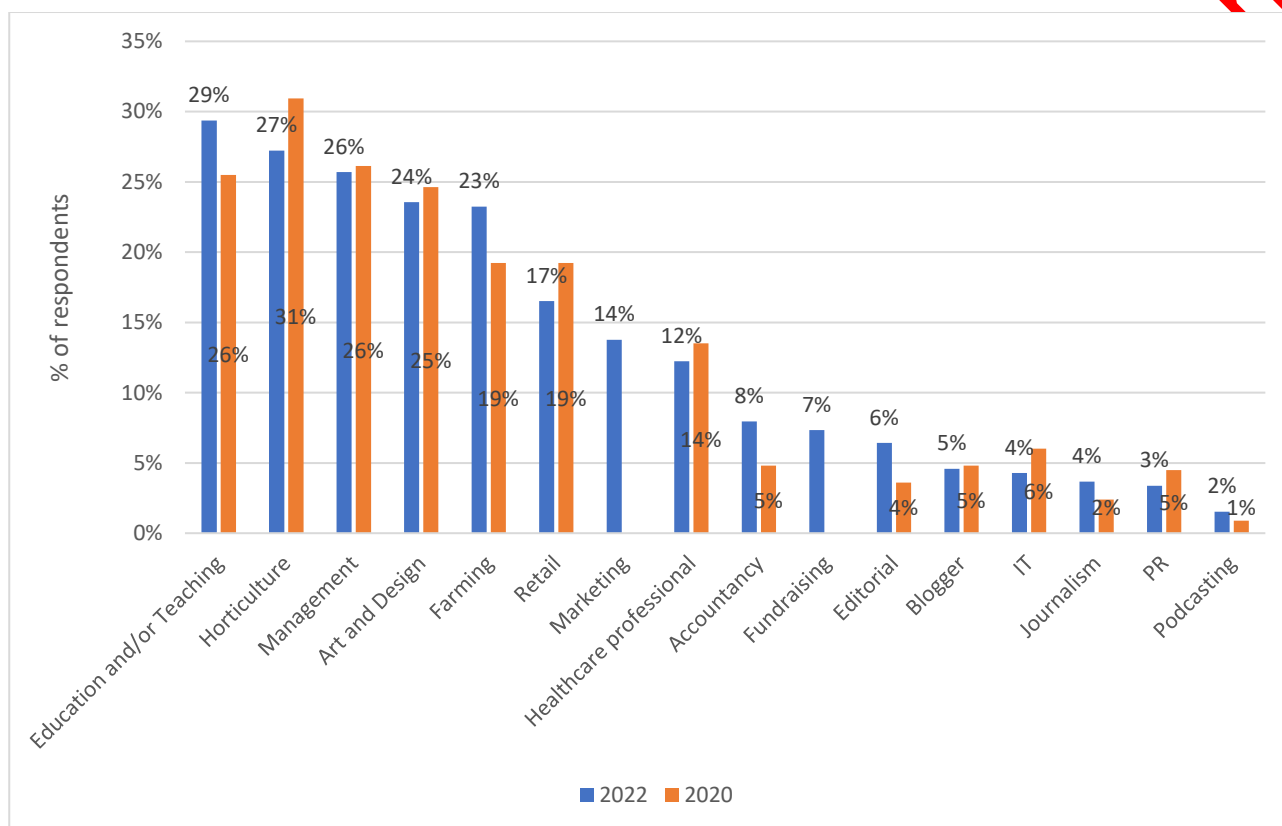
This question was first asked in the 2020 survey with the proportion of responses remaining similar in 2022.

Question 7: Do you have any of the additional skills, expertise, or experience listed below outside of flower growing/floristry?

The responses to this question demonstrate the huge wealth of experience and expertise held by members. 21% (86 out of the 413 respondents) chose not to respond to this question.

For this years survey we combined the categories of Teaching and Education and added two new categories, Marketing and Fundraising.

The top three areas remain consistent with the 2018 and 2020 survey; Education and/or Teaching, Horticulture, Management.

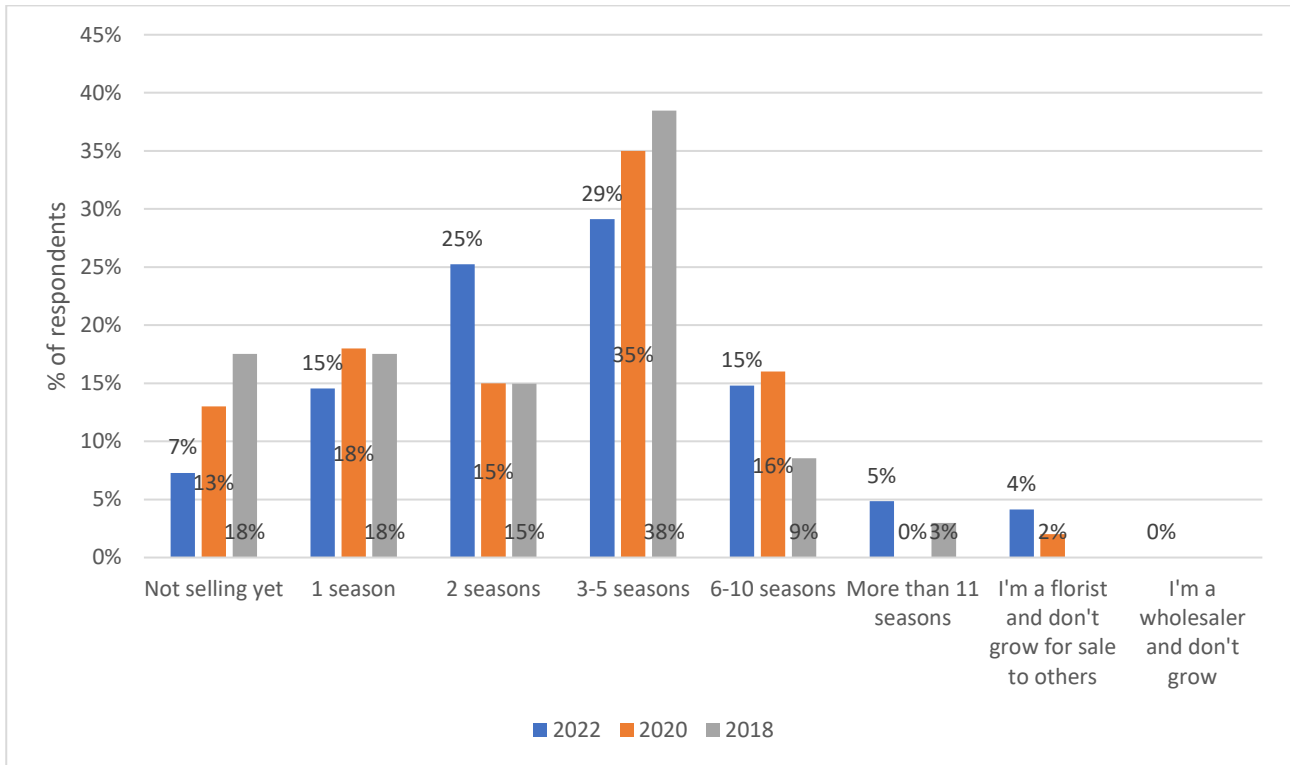


Question 8: How long have you been growing flowers/foliage for sale?

For the 2022 survey we added two new response options to enable those who don't grow to answer the question.

Almost half of all respondents have been growing for 3 seasons or more (49%), which is consistent with the 2020 survey (51%). This means that a number of more experienced members have either stopped flower farming, ceased their membership with FFTF or declined to complete the survey - as we would expect this percentage to increase over time.

The percentage of those new to flower farming (1 season) has reduced (15% in 2022 compared to 18% in both 2020 and 2018). However, we have seen a significant increase of those who are in their 2nd season (25% in 2022 compared to 15% in both 2020 and 2018). This could indicate a possible slowdown of new flower farmers entering into the sector.



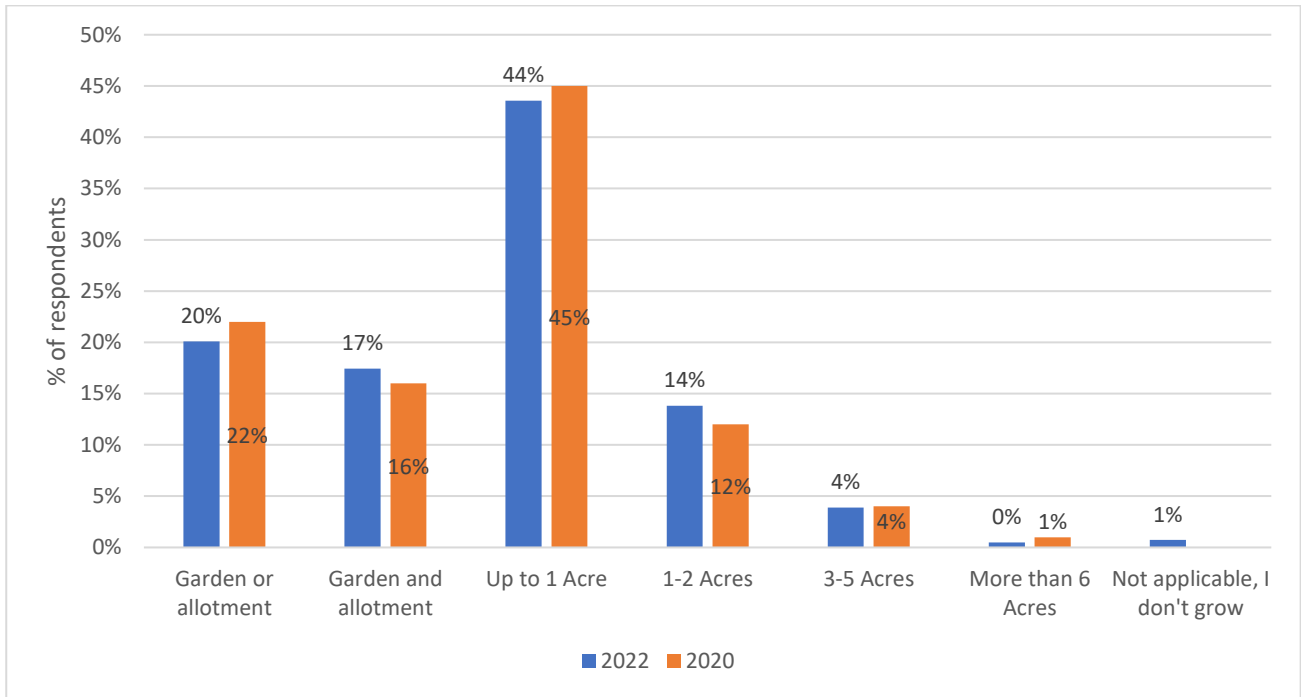
Question 9: How much land do you have under cultivation for flowers/ foliage?

The size categories for growing were different in 2018 so no direct comparison is available. However, in 2018 78% of respondents were growing on an acre or less, this figure was 83% in 2020 and 81% in 2022.

When comparing the data between 2022 and 2020 there is very little change in the ratio of growers and the size of their growing space. The size/scale on which members are growing does not appear to be materially increasing.

Interestingly 60% (6) of those who report a turnover of greater than £75k are growing on land up to an acre and a only 30% (3) are growing on more than 3 acres. Of those reporting a turnover of between £40-75k, only 14% (3) are growing on more than 3 acres.

The data supports the theory that you do not need a significant amount of land in order to operate a thriving business.



Question 10: Do you rent or own your growing area?

The majority of growers grow on land that is owned, however, the 2022 survey indicates an increase in land rental.

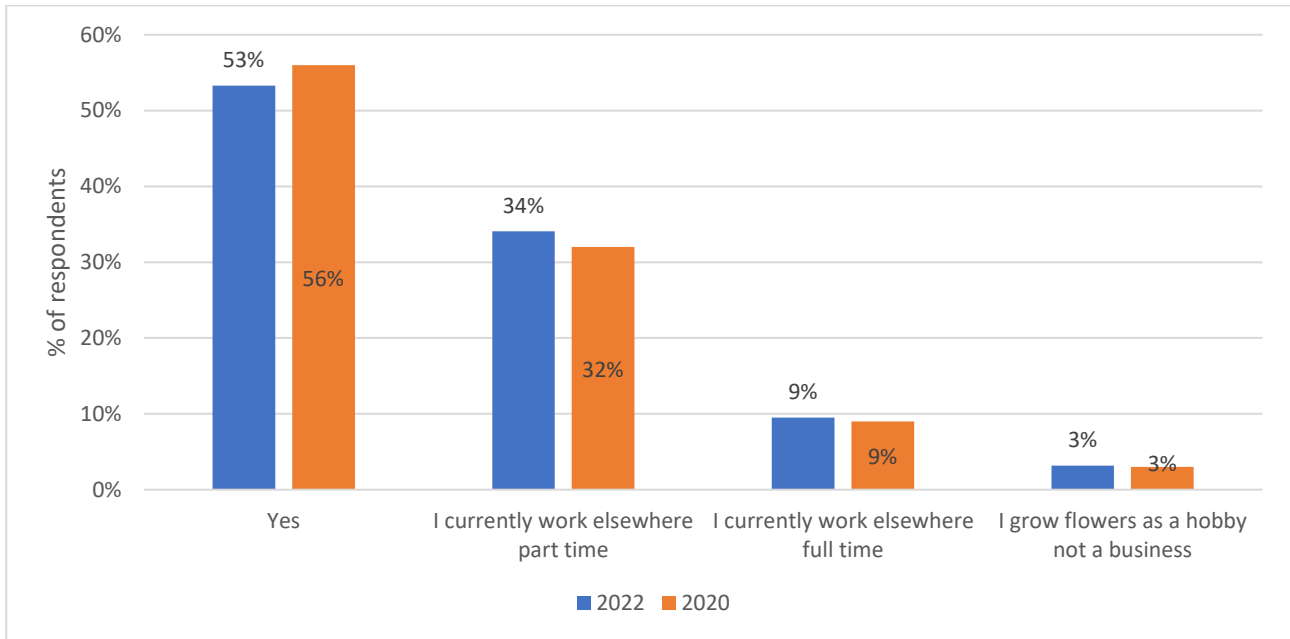
65% of those with a turnover of >£40k own the land they grow on.

	2022		2020	
	Response Percent	Response Total	Response Percent	Response Total
Rent	22%	90	19%	81
Own (including mortgaged)	64%	264	69%	289
Mix of both	13%	54	12%	50
Not applicable, I don't grow	1%	3		

Question 11: Are flowers your only job?

It should be recognised that this question is aimed at the main member, the one completing the survey. Therefore it does not necessarily represent an accurate picture of those businesses who operate as a business partnership or company with more than one owner.

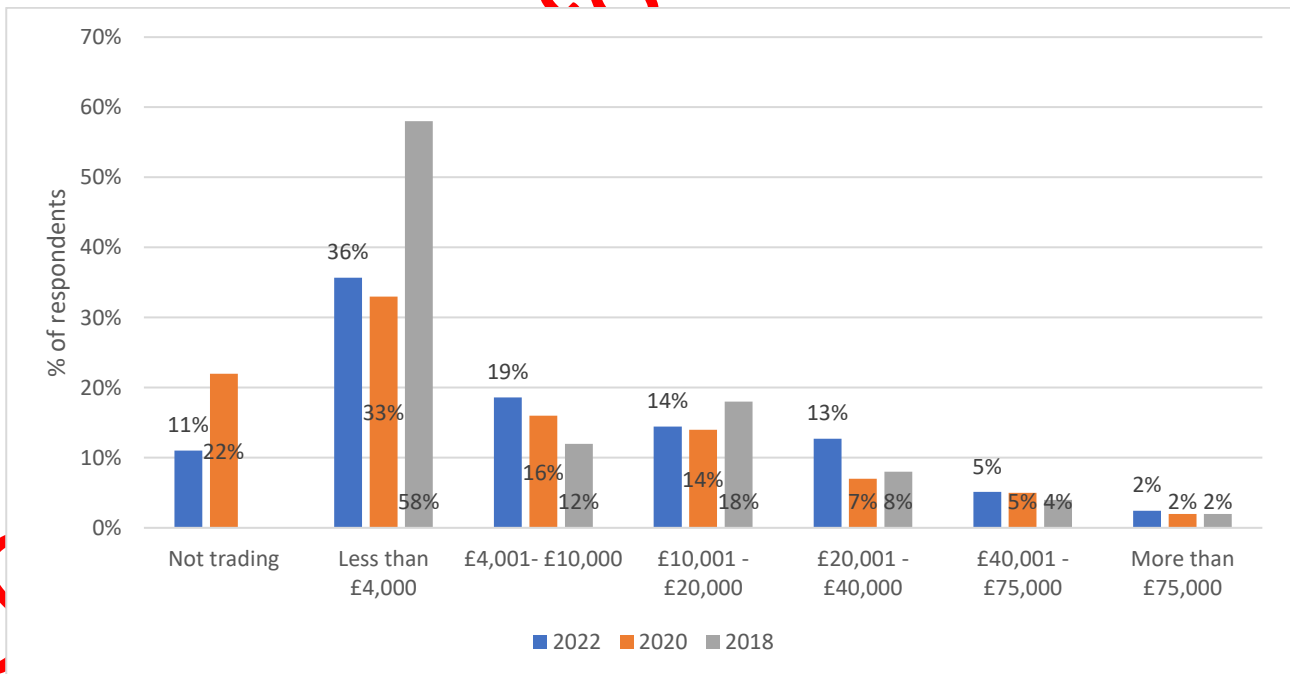
A characteristic of those with a turnover of >£40k is that 94% have flowers as their only job.



Question 12: What was your turnover (sales, not profit) in the Financial year 2021/22?

The data shows a fairly static picture of the number of members earning £40k or above, when compared to previous survey data. The number of members earning £20k-£40k has increased but the results of the 2022 survey show that 80% of respondents turned over less than £20k, and are therefore unlikely to have earned a modest living from their business.

Of those who turned over more than £20k, 63% have been trading for 6 seasons or more.



Remembering that 53% of respondents said that flowers were their only job, and that 49% said they had been growing flowers for sale for 3 seasons or more, it is concerning that 80% turned over less than £20k in 2021/22. This does bring into question the viability of flower farming as a way of earning a decent living.

On balance however, 7.6% of respondents turned over more than £40k. Of those the majority (65%) grow on less than 2 acres. This demonstrates that it is possible to earn a good living from flowers, even if this is not something the majority are currently able to do.

However, given that 47% are in the early stages of their business (having been growing flowers for sale for 2 seasons or less), this may partially account for the low turnover figures.

Another factor impacting on turnover in 2021/22 could have been Covid, which is why Question 13 was introduced as a one-off in this survey.

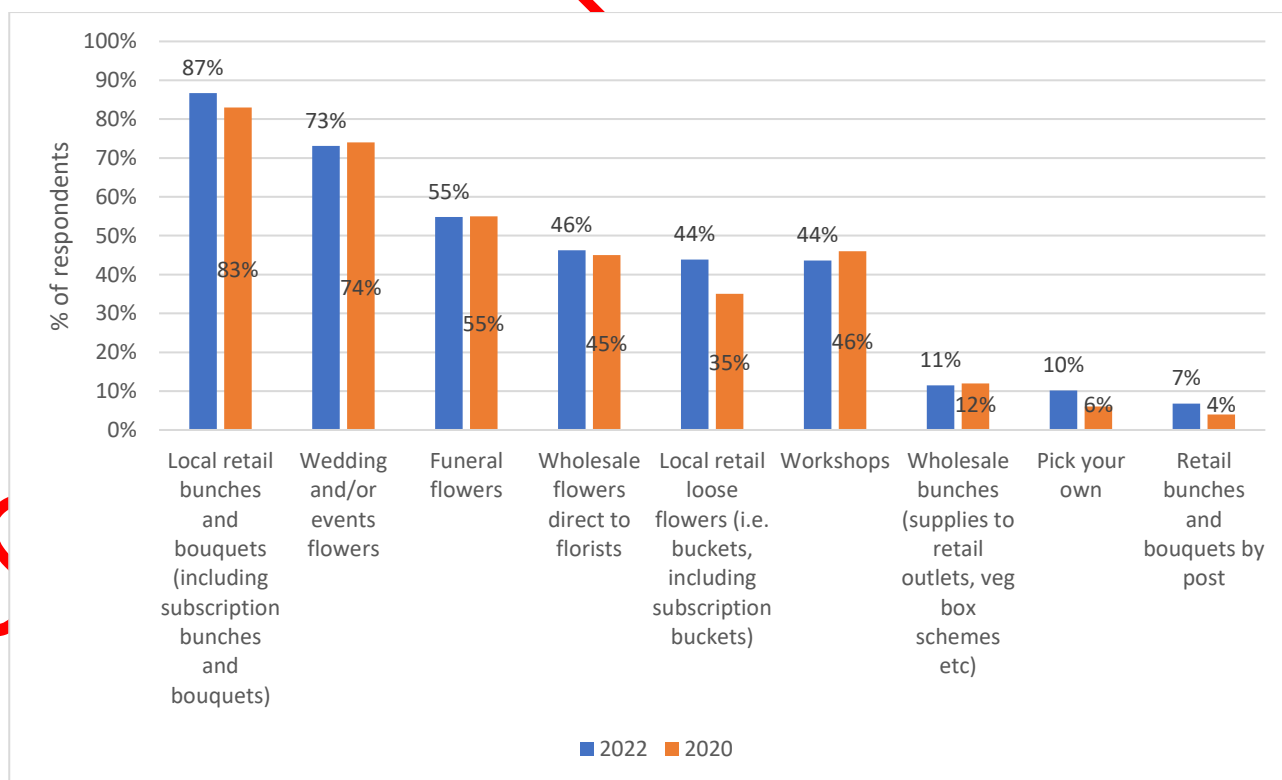
Question 13: Did Covid have a positive or negative impact on your turnover in 2021/22?

The majority of respondents indicated that their turnover was 'as expected'.

Answer Choice	Response Percent	Response Total
Positive impact – my turnover was greater than expected	23.5%	92
Negative impact - my turnover was less than I expected	21.7%	85
Neither – my turnover was as I expected	54.7%	214

Question 14: How many of the following sectors did your business service during the Financial year 2021/2022?

The data for this question isn't comparable to 2018. However, the sectors serviced by FFTF members remain consistent with the 2020 survey.



Question 15: What percentage of the turnover for your business in the year 2021/22 was each of these services?

The question was phrased differently in the 2018 survey, so therefore there is no direct comparison available with the 2018 survey.

The data listed below represents the average response and remains broadly the same between 2022 and 2020.

The top 3 income streams are:

- Local retail bunches and bouquets (including subscription bunches and bouquets)
 - This area has seen the largest area of growth when compared to the 2020 survey
- Wedding and/or events flowers
 - This area has seen a small reduction when compared to the 2020 survey
- Wholesale flowers direct to florists
 - This area has seen growth when compared to the 2020 survey

	Average	
	2022	2020
Wedding and/or events flowers	21.7%	22.8%
Funeral flowers	5.0%	5.1%
Local retail bunches and bouquets (including subscription bunches and bouquets)	30.6%	25.9%
Local retail loose flowers (i.e. buckets, including subscription buckets)	6.4%	3.2%
Pick your own	1.4%	0.9%
Wholesale flowers direct to florists	12.7%	10.9%
Wholesale bunches (supplies to retail outlets, veg box schemes etc)	3.0%	2.2%
Workshops	6.3%	7.6%
Retail bunches and bouquets by post	1.1%	n/a
Other	1.6%	1.7%

Of those who turned over >£40k, their main income stream was wedding and/or events flowers, representing 36% of their turnover.

Question 16: Are you the sole or joint owner of your business?

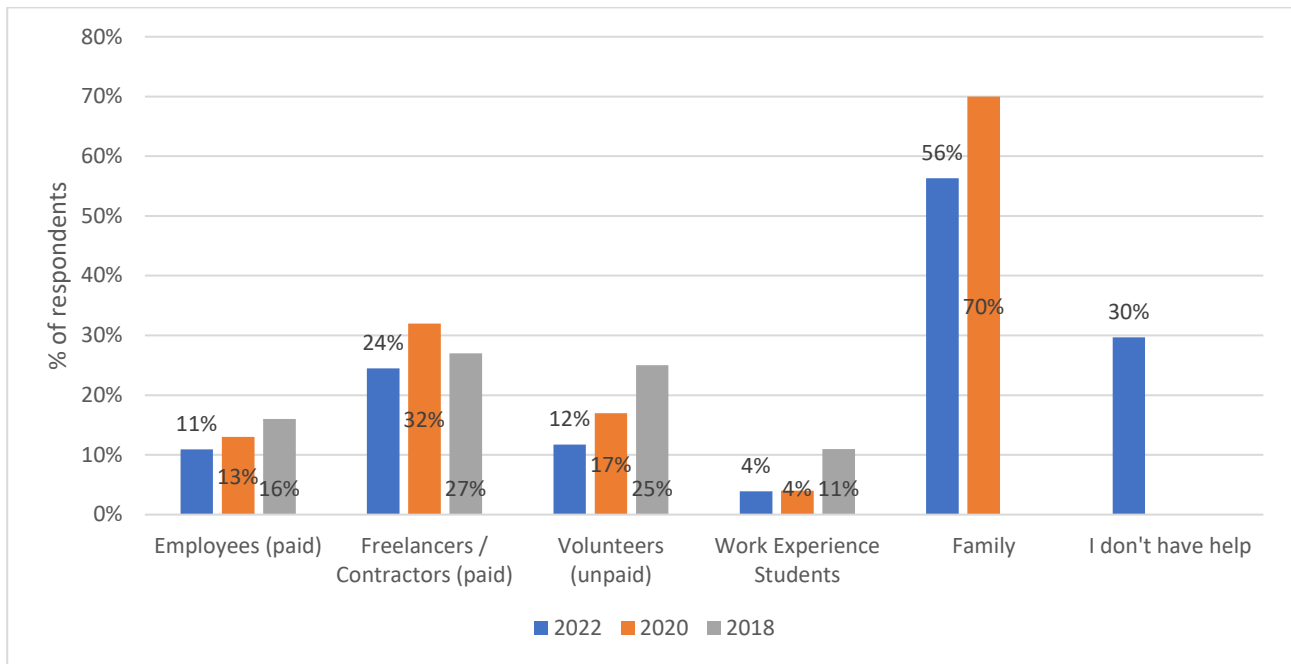
84% are the sole owner of their business, which is an increase from 82% reported in the 2020 survey. This question wasn't asked in the 2018 survey.

Question 17: If you have other people who help you in your business? are they...

29 respondents (7%) skipped this question despite the inclusion of the response option 'I don't have help'. Family wasn't a category included in the 2018 survey.

This data is interesting in that it indicates an overall reduction in the number of members having help in their business. However, this data should be considered in conjunction with Question 18: If you have help, how many hours in total per week do you have help for?





A change to the 2022 survey was to separate the Family and Work Experience categories into 'paid' and 'unpaid'. Unsurprisingly the majority of those who have help from family do not pay for this help.

	2022
Work Experience Students (paid)	1.3%
Work Experience Students (unpaid)	2.6%
TOTAL	3.9%

	2022
Family (paid)	7.8%
Family (unpaid)	48.4%
TOTAL	56.3%

Question 18: If you have help, how many hours in total per week do you have help for?

In answering this question respondents were asked to use an average over the main season. For example, if there are two employees both working 10 hours per week on average across the season, then 20 should have been answered.

	Average	Min	Max
Employees (paid)	3	0	150
Freelancers or Contractors (paid)	1.98	0	50
Volunteers (unpaid)	1.35	0	150
Work Experience Students (paid)	0.62	0	150
Work Experience Students (unpaid)	0.38	0	75
Family (paid)	1.13	0	117
Family (unpaid)	4.88	0	150



This section included an option for free text comments. The majority of comments reflect the fact that help is often 'as and when required' or adhoc (e.g. freelancers when required, help with specific tasks like fencing). Therefore caution should be taken when interpreting the above results.

Question 19: What are your business priorities for 2023?

The list represents the top 20 priorities based on responses to this years survey.

The feedback to this question should be considered as areas of focus which could be supported by FFTF on a regional and national level.

	2022
To increase my turnover	61.6%
To develop my customer base	60.6%
To grow more efficiently and improve my growing	59.6%
To work smarter and more efficiently	56.7%
To increase my profit margin	52.2%
To improve my social media profile	39.4%
To improve my photography	36.9%
To improve my marketing and further establish/develop my brand	36.5%
To improve my website	35.0%
To develop workshop business	34.0%
To improve my floristry	33.5%
To improve my confidence in my business	32.3%
To increase my growing area	31.5%
To develop local retail sales	31.3%
To develop funeral business	27.6%
To consolidate the focus of my business	27.1%
To develop wedding business	24.6%
To improve my sustainability credentials	24.6%
To develop my professionalism and business knowledge	20.4%
To run a less stressful business	19.2%

Question 20: Do you feel that your membership of Flowers from the Farm...

The table below represents the percentage that answered 'Yes' to the following questions.

	2022
Has helped you learn about the British Flower industry?	69.1%
Has helped you learn about growing techniques?	64.3%
Is good value?	62.3%
Has helped you get customers?	52.3%
Has helped you find suppliers?	46.2%
Has helped you find businesses to collaborate with?	39.2%
Has helped you learn about floristry techniques?	35.2%



Question 21: What do you think should be the top 5 priorities for Flowers from the Farm in the next 3 years?

Members were asked to select only five of the options provided to help FFTF understand where the priority of focus should be. There was no way to restrict this in the survey software.

However, the responses to the question indicate that 110 members ticked more than 5 options. This is something that should be considered in future surveys, perhaps allowing members to rank their responses.

It is clear from the data that 'To educate the public about seasonality and provenance of cut flowers' should be the top priority. This is the same 'top response' as the 2020 survey.

Indeed, the top four priorities identified by the respondents all refer to the external facing role of FFTF, as opposed to the internal development of our businesses.

	2022
To educate the public about seasonality and provenance of cut flowers	80.3%
To promote British flowers via PR and Media coverage	54.1%
To promote sustainability agenda to members, florists and the public	50.6%
To promote British flowers via high profile flower shows and events	48.4%
To support members with business information / workshop opportunities	45.0%
To support members with growing information / workshop opportunities	44.0%
To connect customers with businesses via FFTF website directory	43.0%
To support and facilitate friendships via quarterly regional meetings and the annual conference	38.1%
To promote British flowers via national events like The Flower Farmers big weekend	36.4%
To promote British flowers via social media channels	32.9%
To support members with floristry information / workshop opportunities	24.6%
To promote British flowers via FFTF website and blog	21.9%
To support friendships and networking via online forums, online meetings and workshops	21.4%
To consider a paid management / admin structure to increase organisational effectiveness	18.4%
To promote British flowers via regular podcasts	11.3%
To diversify our membership base	8.4%
To promote British flowers by regular video casts (vlogs, YouTube etc)	7.4%
To recruit more members and grow the organisation	6.1%

Feedback Received

A small number of members provided feedback on the survey. Feedback largely centred around a desire to be able to provide more general commentary and for the last question to be responded to by ranking, so that more than 5 priorities could be selected.

All feedback received will be fed back to the Chairs of FFTF to be considered ahead of the next iteration of the survey.

