



Furniture Industry Research Association

# MIND THE GAP

SKILLS AND TRAINING IN  
THE FURNITURE INDUSTRY



OCTOBER 2015

[www.fira.co.uk](http://www.fira.co.uk)



# FIRA

Furniture Industry Research Association



**The Furniture Makers' Company**  
the furnishing industry's charity

This report has been produced by FIRA International Ltd on behalf of the Furniture Industry Research Association and the Worshipful Company of Furniture Makers.

FIRA would like to acknowledge the contribution of the large number of organisations and individuals that have provided invaluable input throughout the project.

© FIRA International Ltd. 2015

Reproduction and distribution of this document is encouraged under the condition that the source is acknowledged.



# Contents

<b>Executive summary</b>	<b>6</b>
--------------------------	----------

<b>1.0 Introduction</b>	<b>7</b>
-------------------------	----------

<b>2.0 Background</b>	<b>8</b>
-----------------------	----------

2.1 Aims and objectives .....	8
2.2 Method .....	8
2.3 Responses .....	8

<b>3.0 Skills</b>	<b>9</b>
-------------------	----------

3.1 Industry profiles .....	9
3.2 The impact of skills shortages on business .....	11

<b>4.0 Finding the right people</b>	<b>12</b>
-------------------------------------	-----------

4.1 Introduction .....	12
4.2 Recruitment .....	13
4.2.1 Ease of recruitment .....	13
4.2.2 Recruitment patterns .....	14
4.2.3 Existing skills of new recruits .....	15
4.2.4 Links with local education and training providers .....	16
4.2.5 Importance of nationally recognised qualifications .....	16
4.3 Training .....	18
4.3.1 Training investment .....	18
4.3.2 Quality of external training providers .....	19
4.4 Apprenticeships .....	22
4.4.1 Introduction .....	22
4.4.2 Employment of apprentices by manufacturers .....	22
4.4.3 Employment of apprentices by retailers, distributors and importers .....	23
4.4.4 Breakdown of apprenticeships .....	24
4.4.5 Finding the right apprentice .....	24
4.5 Skills retention .....	25

<b>5.0</b>	<b>The UK furniture workforce</b>	<b>26</b>
5.1	Introduction .....	26
5.2	Age profile .....	26
5.3	Workforce nationalities .....	27
<b>6.0</b>	<b>Foresight</b>	<b>28</b>
6.1	Introduction .....	28
6.2	Business growth .....	28
6.3	Skills shortages in 5 years time .....	28
6.4	The future of apprenticeships .....	30
<b>7.0</b>	<b>Where are the gaps?</b>	<b>32</b>
7.1	Introduction .....	32
7.2	Relationships with schools .....	32
7.3	Focusing on the main skills gaps .....	32
7.4	Quality of provision .....	34
7.5	Understanding and developing apprenticeships .....	34
7.6	It's not all about apprentices and qualifications.....	34
7.7	Location, location, location .....	36
7.8	Recruitment and training culture .....	36
7.9	Ageing workforce .....	37
7.10	Working with Government .....	37
<b>8.0</b>	<b>Single point of contact</b>	<b>38</b>
	<b>Appendices</b>	<b>39</b>
	Breakdown of responses .....	40
	A1.1 Manufacturers .....	40
	A1.2 Retailers, distributors and importers .....	42
	Companies who responded to the survey .....	44
	Project steering group .....	46

# Executive summary

[▲ Back to contents page](#)

“Mind the Gap” is all about training and skills in the furniture sector.

Furniture manufacturers and retailers are reporting a degree of optimism since the effects of the 2008 recession. A significant number of companies managed to survive this event, many by retrenching in terms of investment and labour. Now that demand for UK furniture is, once again, on the increase, organisations are finding that they don't have some of the necessary skills sets to take advantage of this recent upturn in fortunes.

This report aims to fuel the development of industry wide initiatives to ensure that the skills agenda is fully addressed. It provides the quantitative and qualitative evidence needed to underpin the formulation of training strategies and covers important issues such as:

- Skills shortages;
- Nature and quality of training provision;
- Quality of the available workforce;
- Companies' attitudes to, and investments in, training;
- The effect of skills shortages on business performance;
- Skills for the future.

Quantitative data within the report originated from responses to an online questionnaire that was distributed widely throughout the sector via a number of different trade bodies. In addition, 60 companies were interviewed to gather important anecdotal evidence and to further refine data received from the questionnaire.

Responses were received from 123 manufacturers and 50 retailers, distributors and importers.

The report uses data, interviews and results from validation sessions to draw its conclusions about the gaps that need to be filled to ensure that industry takes positive, co-ordinated actions to improve its skills agenda.

Improvements are suggested in a number of areas such as:

- Developing relationships with schools to attract better leavers into the industry;
- Focusing on skills developments to address the most significant gaps. These include upholstery, sewing, machine operation and programming, finishing and production management;
- Improving the quality and flexibility of training provision ;
- Understanding and developing apprenticeships;
- Developing short courses to cover legislative and other contemporary issues;
- Improving recruitment and training culture;
- Combating an ageing workforce;
- Maintaining regular dialogue with Government.

It is suggested that significant impacts in these areas will only accrue if an organisation, or organisations, champion the activities needed in a co-ordinated and consistent manner, and at a national level.

The report contains invaluable evidence to underpin discussions with industry, training providers and Government. It also provides the focus for the first in a series of national training and skills summits that have been initiated by the Worshipful Company of Furniture Makers.

There is a renewed feeling of cautious optimism amongst furniture manufacturers and retailers, fuelled by anecdotal evidence and Government statistics. By the end of 2013, furniture manufacturing output in the UK rose above £7 billion for the first time since 2010. More recent data indicate that manufacturing production in 2014 was 2% greater than in the previous year, although there is still a degree of recovery needed to achieve pre 2008 levels. This financial performance was delivered by a workforce of 83 thousand, with, arguably, another 100 thousand plus individuals in the retail sector.

These factors signpost the potential for long term expansion but achieving this ambition isn't all about money. It is also about people. Maximum advantage will only be gained by profiting from a workforce with skills that reflect the needs of an evolving industry, in particular over the next five to ten years.

Industry can't rely on luck to deliver such a workforce and a concerted, collaborative effort across the whole sector is essential to ensure that Government, and the wide range of training and skills providers, from schools through to universities, understand what is needed.

A potential skills gap was first highlighted within the Furniture Industry Research Association's 2010 Competitiveness Analysis, but at the time the impact of the financial crisis had just started to bite, and survival often prevailed over strategy. However, planning ahead can no longer be put "on hold" otherwise companies will find themselves in the position of not having time to train and develop a work force for the future.

As a result, the Worshipful Company of Furniture Makers (WCFM) and The Furniture Industry Research Association initiated an industry wide survey to gather evidence in support of future strategy.

The evidence comprises responses to a structured survey combined with anecdotal opinion collated from interviews and validation sessions.

**"The upturn in fortunes appears to have caught a few companies on the hop. They now need skilled staff to cope with short term demands and can't wait for apprentices to reach required skills levels."**



## 2.1 Aims and objectives

In December 2014, the Furniture Industry Research Association and the Worshipful Company of Furniture Makers agreed to collaborate on a survey to determine skills needs and training practices amongst furniture manufacturers and retailers in the UK.

The survey sought to identify key issues that impact on the sector such as:

- Skills shortages;
- Nature and quality of training provision;
- Quality of the available workforce;
- Companies' attitudes to, and investment in, training;
- The effect of skills shortages on business performance;
- Skills for the future.

## 2.2 Method

Quantitative data within the report originated from responses to an online questionnaire that was distributed widely throughout the sector via a number of different trade bodies (Appendix 1). Respondents didn't always answer each question hence sample numbers vary from section to section.

In addition to the quantitative responses, 60 companies were interviewed. The aim of these interviews was two-fold; firstly to encourage a greater response rate and thus improve the quantitative data and secondly to gather qualitative, anecdotal evidence. A significant proportion of these organisations were within the larger turnover size band. Whilst this approach skewed the sample in relation to the demographics of the sector as a whole, this was a deliberate approach as these companies employ a larger number of individuals and are more able to invest in the provision of personal development through training.

Finally, two validation sessions were held where preliminary survey data were presented to gather additional qualitative evidence in support of the final report.

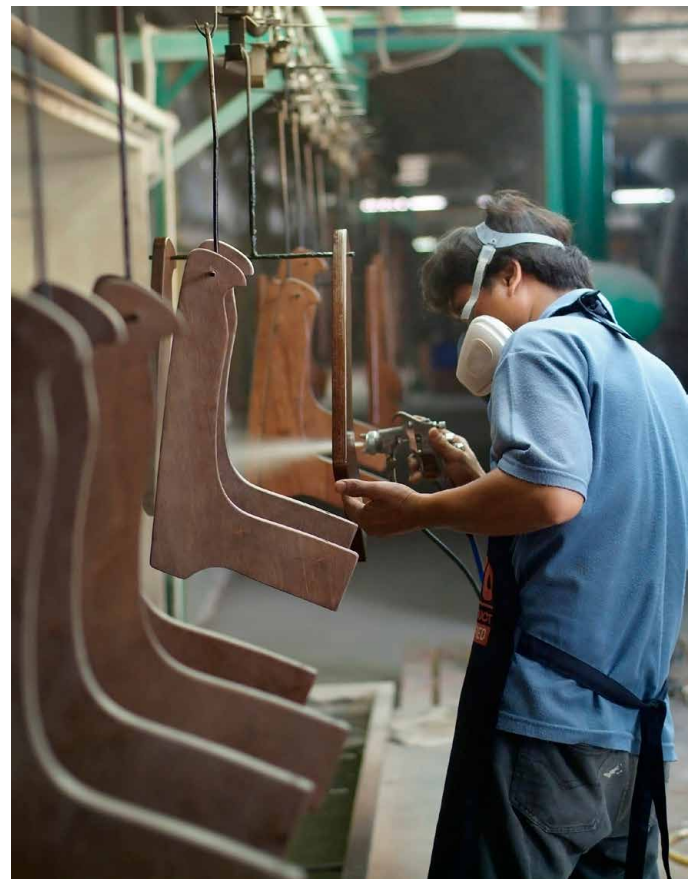
A full breakdown of the survey sample set is shown in Appendix 1.

## 2.3 Responses

The number of responses received was as follows:

- **Manufacturers**  
96 companies fully completed the survey and 27 companies partially completed the survey.
- **Retailers, distributors and importers<sup>1</sup>**  
33 companies fully completed the survey and 17 companies partially completed the survey.

As mentioned previously, not all of the respondents answered all of the questions, and, particularly within the retail section, the number of responses was often relatively small. Under these circumstances interpretation of the data has required careful consideration for significant response patterns to be identified.



<sup>1</sup> Where the term "retailers" is used throughout the report this reflects the category "Retailers, distributors and importers".

## 3.1 Industry profiles

The importance of having the right skills mix within any business cannot be underestimated. In fact one of the drivers behind the production of this report was prior anecdotal evidence from companies claiming a lack of adequate resources. Companies were presented with a list of job skills / types and asked to categorise these in relation to their availability within the business.

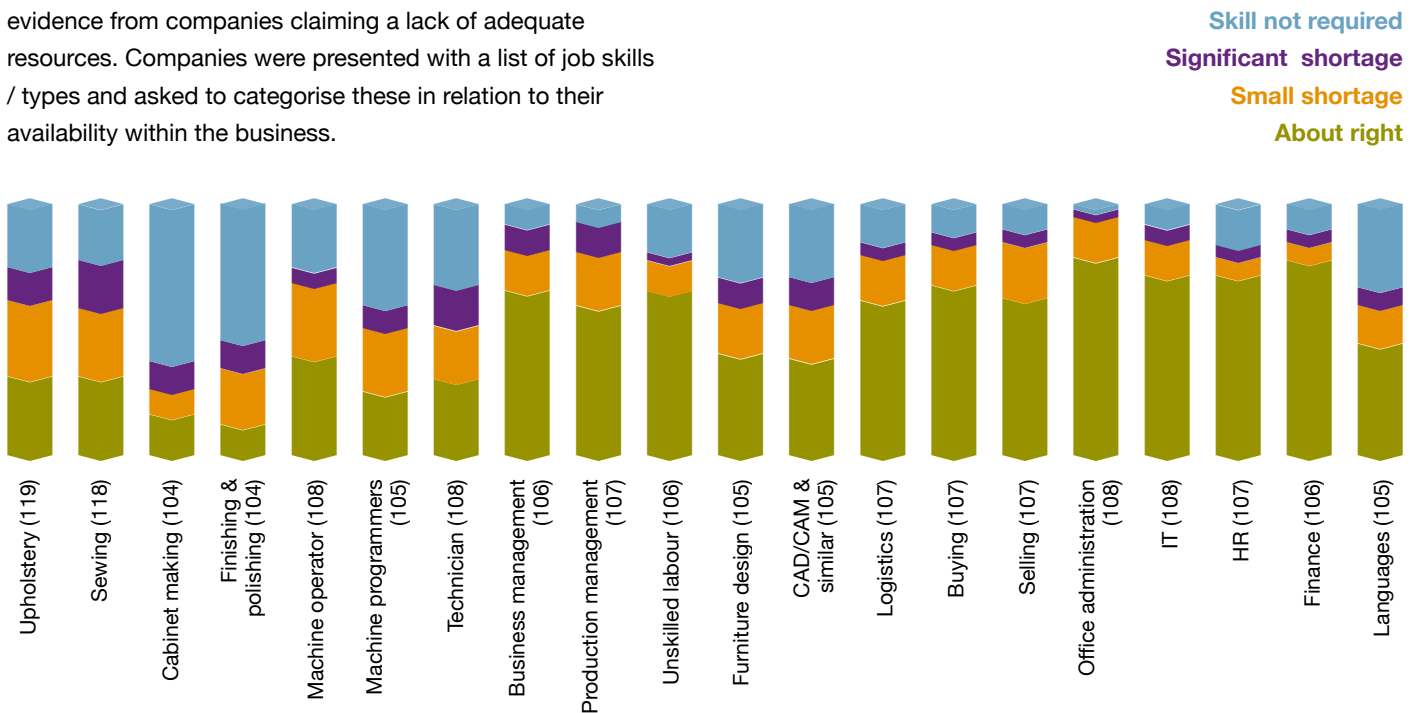


Figure 1. Percentage breakdown of current skill competencies for manufacturers (number of respondents shown in parentheses)

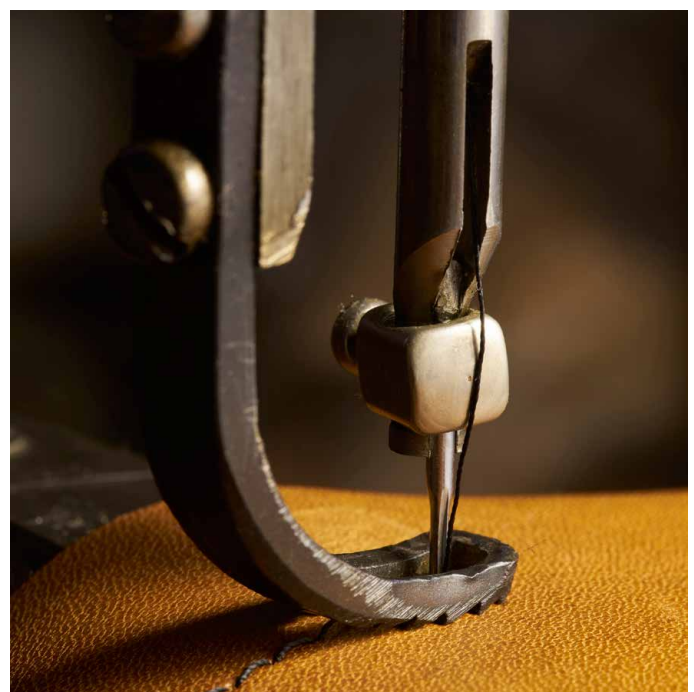
Manufacturers are of the opinion that the more “non furniture specific” skills such as finance, buying, selling, HR and IT are adequately covered (Figure 1).

The most significant skills shortages are in upholstery and sewing where 42% and 45% of respondents indicated either a small or significant shortage. 19% indicated a **significant** sewing shortage.

A need (small or significant shortage) for machine operation and general technical machine skills was identified by 33% and 30% of respondents respectively.

Other skills shortages are as follows:

- Finishing and polishing;
- Machine programming;
- Production Management;
- Furniture Design;
- CAD / CAM.



Quantitative evidence of machining and machinery skills shortages backs up anecdotal evidence to this effect as does that for sewing and upholstery.

Interestingly, one of the wider used skills within the sector (cabinet making) appears to be less of an issue in relation to skills shortages.

Retailers, distributors and importers were presented with slightly different skill / job options to manufacturers (Figure 2). Furniture technologists or individuals with furniture manufacturing knowledge represent the greatest skills shortages (65% and 62% respectively with a small to significant shortage). This supports anecdotal evidence and the tendency for these individuals to move from company to company for better employment packages.

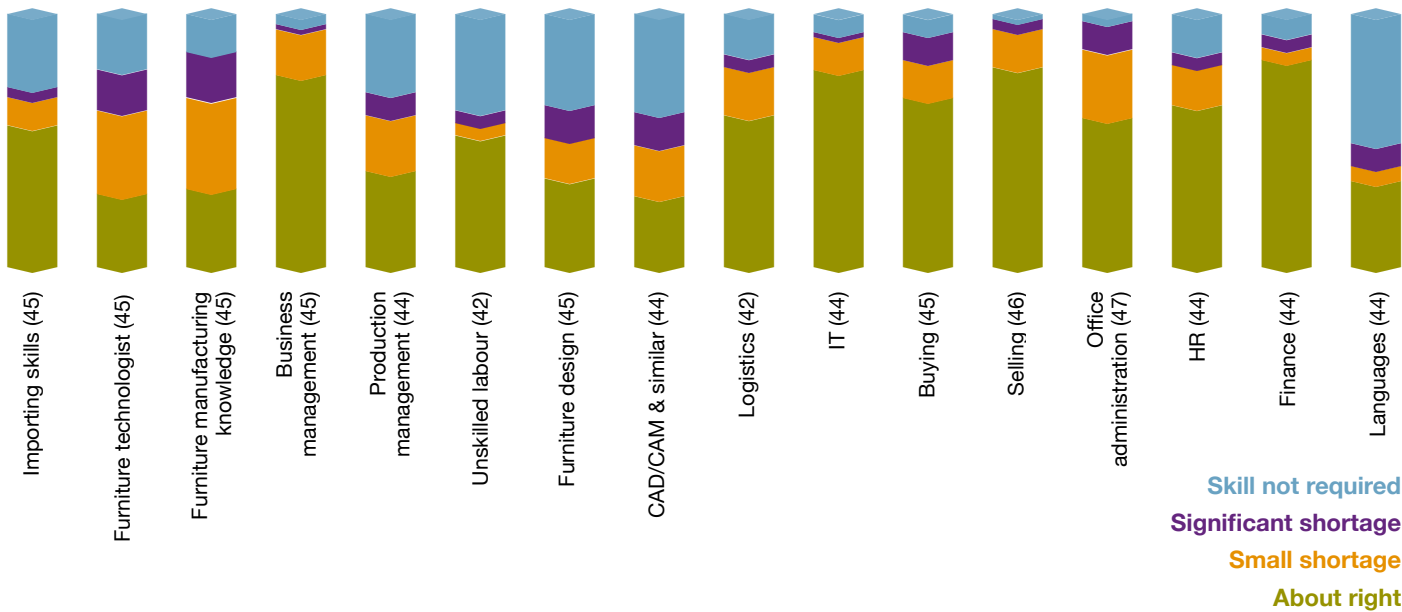


Figure 2. Percentage breakdown of current skill competencies for retailers, distributors and importers (number of respondents shown in parentheses)

Whilst more general skills such as logistics, buying, selling, office administration, IT and HR are adequately covered, there are small to significant shortages (43% to 52% of responses) in the number of people that are skilled in furniture design, production management and CAD/CAM. These skills were also identified by manufacturers as being in short supply.

“Design students are not aware of how involved they can be within technologist roles. Colleges and universities should provide more career advice along these lines.”

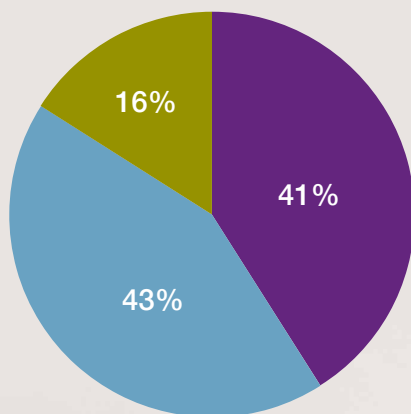
## 3.2 The impact of skills shortages on business

Both manufacturers and retailers experience skills shortages, largely with a bias towards roles that are furniture sector specific. Whilst this is clearly inconvenient, it is important to assess how it impacts on company performance.

Respondents who identified any skills gaps were asked to what extent these constrained their businesses. 16% feel that they are significant enough to result in loss of business and an additional 43% reported a constraint on output to some extent (Figure 3).

This pattern is almost exactly the same for retailers, distributors and importers.

These are worrying statistics and, out of all of the questions asked, justify the need to better understand why manufacturers and retailers are in the position of having to function in a skills environment which impacts so negatively on output and profitability.



**Minimal effect**

**Constrained my output slightly**

**Significant enough to result in loss of business**

Figure 3. The effects of skill shortages on manufacturers (104 out of a total of 123 respondents)



# Finding the right people

## 4.1 Introduction

As summarised in the previous section, over 80% of respondents identified one or more skills shortages in relation to their businesses and, of these, 59% feel that this constrains output or results in loss of business. In the light of this, it is reasonable to assume that companies would prefer not to be placed in this position and that they must, therefore, be finding it difficult to fill critical positions.

Manufacturers were asked what tactics they employed to try to ensure that their businesses retain individuals with the right skills. The vast majority reported that in house training of existing and new, unskilled staff was the most common method (Figure 4).

Almost 50% take on apprentices. However, this doesn't reflect national figures within the sector which, according to Proskills, currently run at about 400 per year. This skewed result is probably a result of respondents to the survey already having a greater interest in apprenticeships and training.

Almost 40% are prepared to fund external training.

Disappointingly, less than 50% focus on staff retention and the anecdotal "bug bear" of poaching skilled labour from competitors is still a technique employed by almost a quarter of the industry.

Retailers employ slightly different tactics to manufacturers (Figure 5), although in house training of new and existing staff is also the preferred method for ensuring that the business has the right skills.

Apprenticeships in furniture retail are less common (20% of respondents take on apprentices). Retailers are more focussed on staff retention. However, an apparent contradiction to this is that 55% also rely on sourcing skilled labour from competitors. Successful poaching implies unsuccessful staff retention and vice versa. This behaviour seems to support anecdotal evidence to this effect.

**In effect there are only a few ways that skills gaps can be addressed.**

- **Recruitment;**
- **Training of existing staff;**
- **Retaining existing experienced staff.**

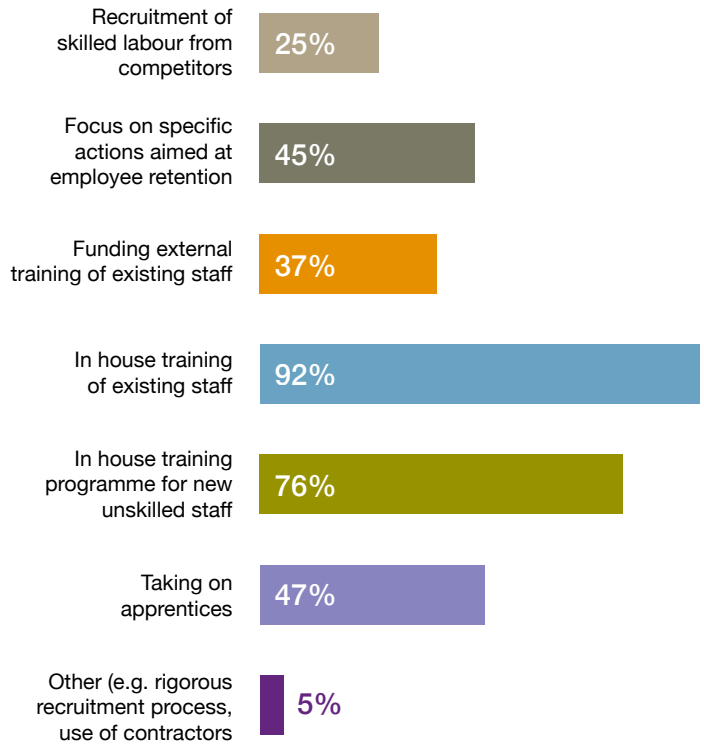


Figure 4. Variety of methods employed by manufacturers to ensure that they have the right skills within their businesses (107 out of a total of 123 respondents)

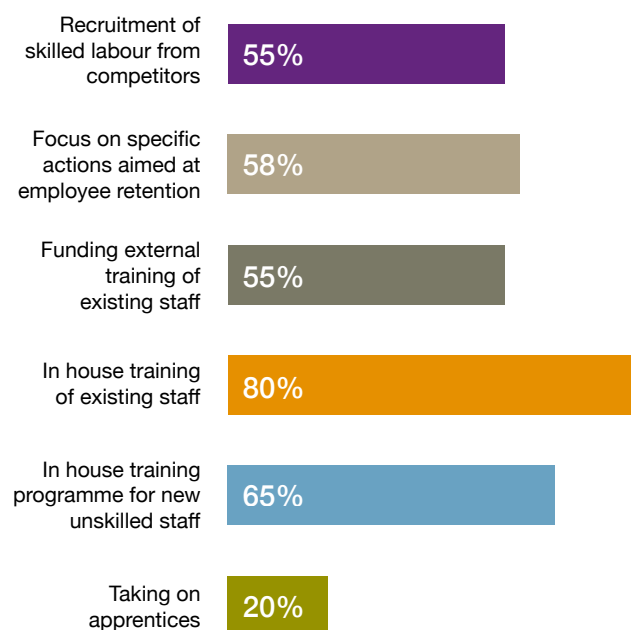


Figure 5. Variety of methods employed by retailers, distributors and importers to ensure that they have the right skills within their businesses (40 out of a total of 50 respondents)

## 4.2 Recruitment

### 4.2.1 Ease of recruitment

UK unemployment figures have fallen over recent years<sup>2</sup>. This suggests that employers are competing more for a diminishing resource and that some may be experiencing recruitment difficulties.

Furniture manufacturers support this supposition, with 7% stating that they always have a problem in generating responses to job adverts. 22% indicated that this is a frequent occurrence, and 39% sometimes have a problem. Only one third of manufacturers stated that they have no problem in this area.

The situation was slightly less of an issue for retailers (all be it from a smaller sample), with only 2% (1 company) always having a problem in receiving responses to adverts, 16% frequently and 46% sometimes having a problem. 36% have no problem at all.

When it comes to recruiting individuals with important job attributes, manufacturers and retailers both report concerns (Figure 6). Almost 60% of manufacturers find it difficult to recruit people with relevant technical / job specific skills and appropriate experience.

Similar observations are reported by retailers, although there is a tendency to find it slightly easier to recruit individuals with appropriate experience.

Anecdotal concerns about young recruits having a poor work ethic, and poor personal skills, appear to be generally unfounded, although results suggest that finding individuals with good personal and work capabilities is a much more “neutral” experience, and that there is some room for improvement. In some circumstances this issue may be exacerbated by the way that companies interact with the individuals concerned.

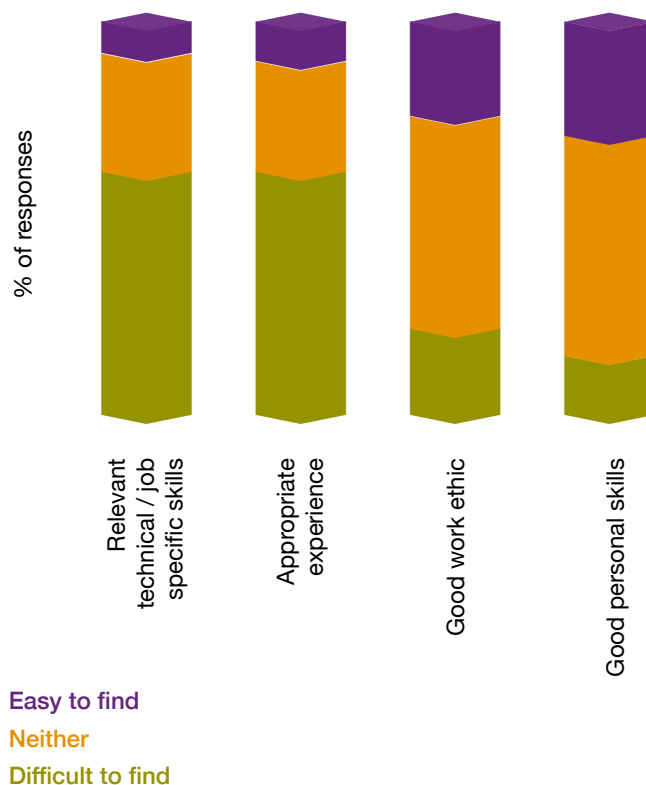


Figure 6. The ease by which manufacturers are able to find new recruits of various attributes (104 to 106 from a total of 123 responses)



<sup>2</sup> Office for National Statistics. A02 Summary of headline LFS1 employment, unemployment and economic inactivity series.

### 4.2.2 Recruitment patterns

Companies were asked what type of individuals they tend to employ.

112 manufacturers answered this question with a clear tendency for selecting older individuals experienced in furniture manufacturing. Interestingly, younger individuals with no furniture experience are next on the list, although there is probably no significant difference between this category and those over 25 with no experience and under 25 with some experience.

There is less of a tendency to (or not to be able to) recruit school leavers, further education leavers or recent graduates.

The recruitment pattern is similar in the retail sector. 43 companies responded to the question and, whilst almost

all companies also tend to recruit older individuals with furniture experience, a greater emphasis is placed on under 25s with furniture experience than for manufacturers. Graduate recruitment is slightly higher than for manufacturers, and slightly fewer school leavers are employed.

The most significant factor is that recruitment of older, experienced individuals is a common occurrence, which underlines other anecdotal evidence where acquiring staff from competitors is a common recruitment technique. In addition, the tendency to recruit over 25 year olds will increase employee age profile.

Recent education leavers (at any level) tend not to be the primary recruitment choice.

Table 1. Employment profiles by number of responses

	Manufacturers	Retailers
First time school leavers	31	7
First time further education leavers	34	14
New or recent university graduates	39	17
Personnel with no furniture experience under 25	67	25
Personnel with no furniture experience over 25	61	19
Personnel with furniture experience under 25	57	24
Personnel with furniture experience over 25	87	38



### 4.2.3 Existing skills of new recruits

The reasoning behind these responses was investigated further through a question about the skills competencies of recruits from each of the groups.

The majority of manufacturers who responded in relation to each of the groups feel that over 25 year olds with some furniture experience are proportionately better able to meet the needs of a new job (either fully or partially) than all other categories.

Under 25s with furniture experience are also rated comparatively highly in this respect as are recent graduates, although this is not generally reflected in terms of “tendency to recruit” as discussed previously (Section 4.2.2).

As anticipated, the lowest job relevant competencies are attributed to first time school leavers and further education leavers.

Competencies of new recruits is less of an issue for retailers, with 65% (under 25s with no furniture experience) to 89% (over 25s with furniture experience) deemed to have skills that fully or partially meet requirements. 100% of respondents felt that school leavers had the necessary full or partial job skills. However, there were only 5 responses to this element of the question, which raises a question about the true significance of this conclusion.

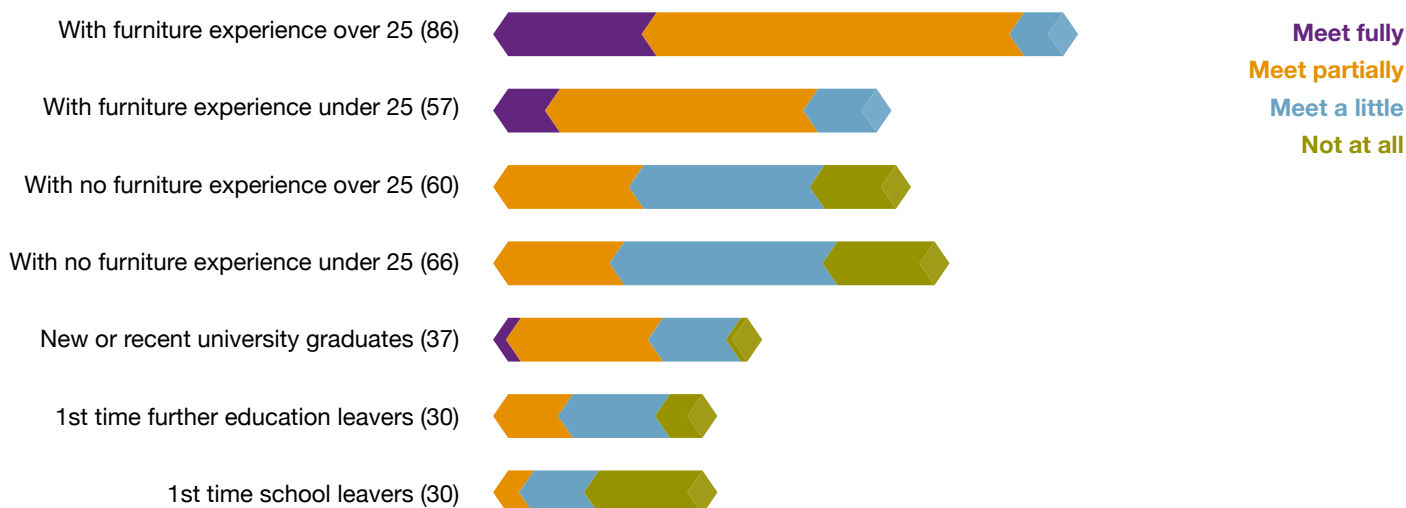


Figure 7. Competency breakdown of recruits employed by manufacturers (number of respondents shown in parentheses)

#### 4.2.4 Links with local education and training providers

Networking with the local community is one avenue to explore when trying to overcome recruitment difficulties. Between 35% and 41% of manufacturers who answered the question have regular links with local schools, colleges and universities, and 73% have more regular dialogue with specialist training providers (Figure 8).

Whilst these statistics hint that networking with local providers of the future workforce is active and healthy, the reality is that only 67 (out of a total of 123) companies answered this question, whereas response rates for most other questions exceeded 100. This suggests that many of the non-respondents may, in reality, have little or no interaction with such organisations.

Retailers interact significantly less with local schools and colleges than manufacturers. Again only 20 out of a possible 53 companies responded, suggesting that the remaining 33 are not entirely engaged with this form of local networking.

#### 4.2.5 Importance of nationally recognised qualifications

It is clear that companies recognise the importance of having the correct skills sets for their businesses. However, training providers need to know how much importance manufacturers and retailers place on the need for their employees to hold nationally recognised qualifications.

Whilst 52% of manufacturers state that nationally recognised qualifications are important to them, 36% feel that they aren't and 12% didn't specify a preference.

The results from the retail sector were similar, with 50% of businesses feeling that qualifications are important (39% said not important and 11% didn't know).

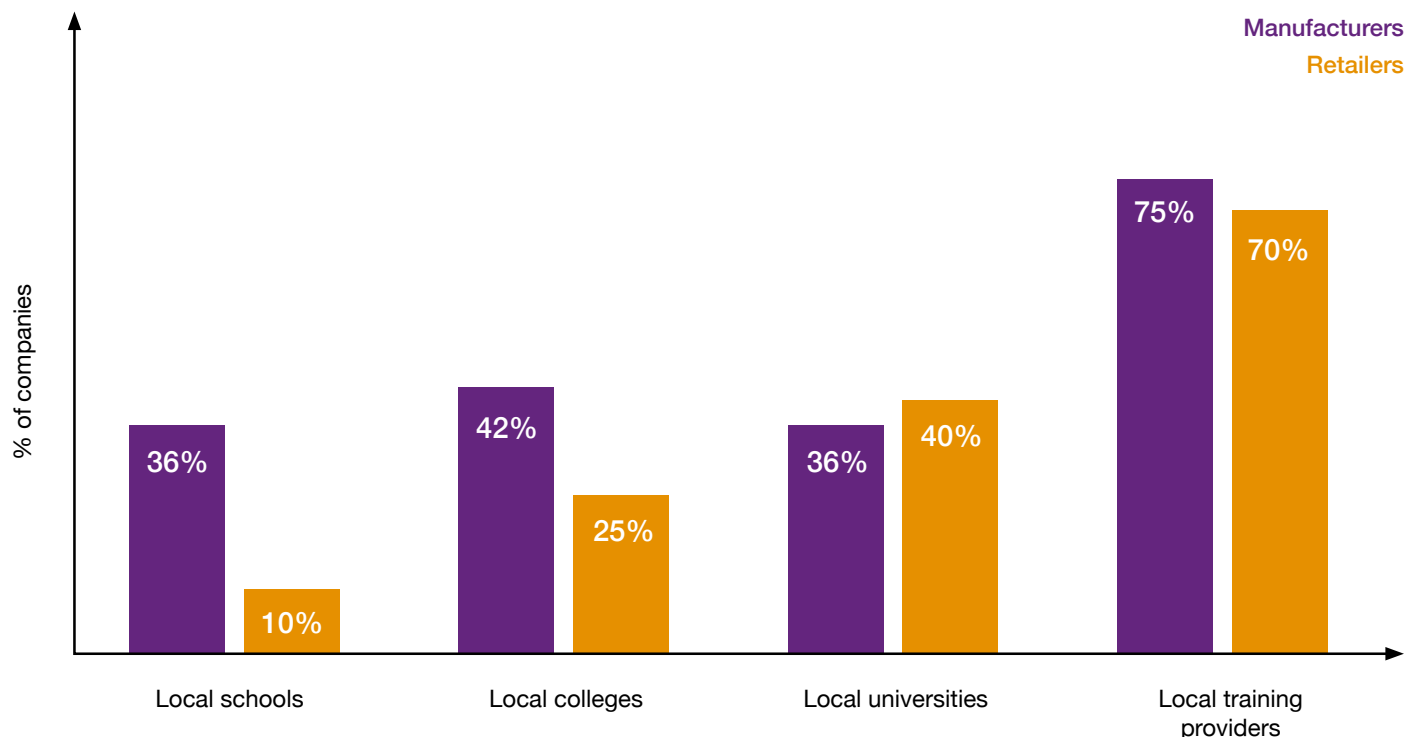


Figure 8. Manufacturers' and retailers' dialogue with local education and training providers (67 and 20 out of a total of 123 and 51 respondents respectively)

▲ [Back to contents page](#)

4.0



## 4.3 Training

### 4.3.1 Training investment

Respondents were asked to estimate the number of days allocated per person per annum for on the job (internal) and off the job (external) training (Figures 9 and 10).

Internal training is the main method of skills development for manufacturers peaking at 10+ days per year for 47% of companies and 77% of companies providing 5 or more internal training days a year.

External training is much less common. 20% and 23% offer zero and 1 day external training per year respectively and 80% offer less than 5 days per year.

The pattern for retailers is remarkably similar. 77% of companies provide 5 or more days of internal training (although only 33% offer more than 10 days). External training patterns are again similar, although a small percentage of manufacturers offer more than 5 days whereas retailers not.

On the job training is the most common method of employee training in terms of the number of training days given. However, retailers appear to rely on more off the job training with 77% offering between 1 and 5 days external training compared to only 67% for manufacturers.

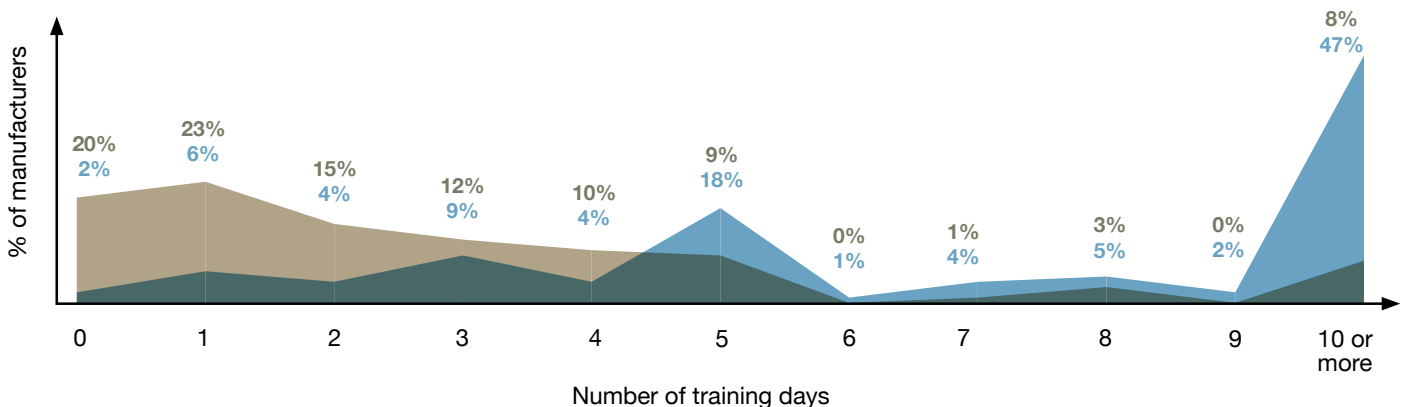


Figure 9. Number of days allocated to training by manufacturers per year (105 and 93 out of a total of 123 respondents for internal and external training respectively).

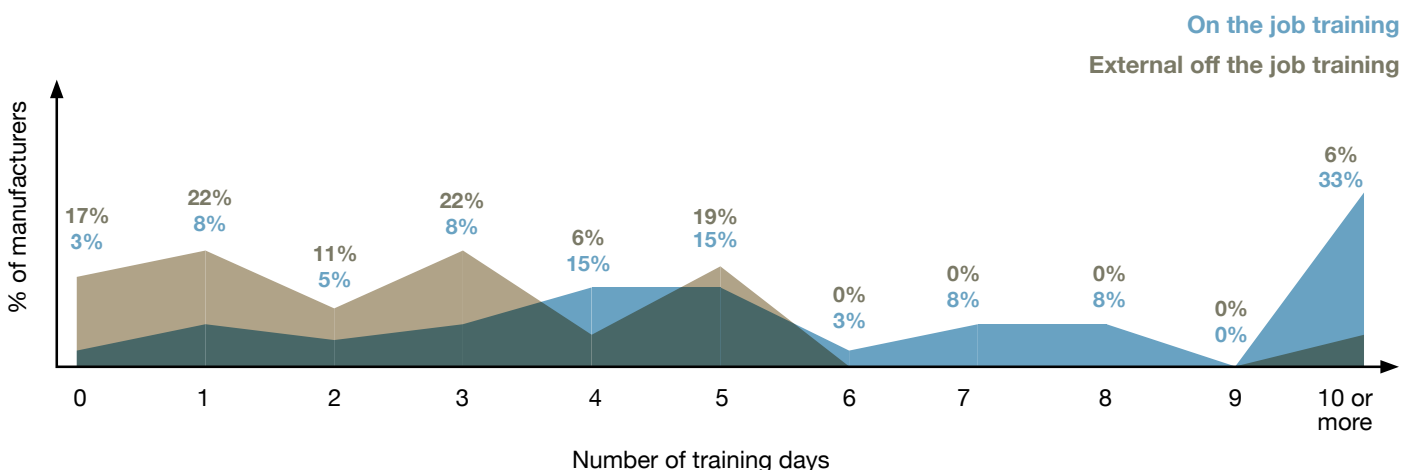


Figure 10. Number of days allocated to training by retailers, distributors and importers per year (40 and 36 out of a total of 50 respondents for internal and external training respectively)

### 4.3.2 Quality of external training providers

The low take up of external training within the industry suggests that understanding the quality of external skills provision would be of comparatively little concern to manufacturers or retailers. However, it is important to analyse if the quality of external training available is actually a factor in its low uptake.

Manufacturers and retailers who stated that they only provided 1 day or less external training were asked why this was the case. The majority felt that their staff had sufficient skills or that they carried out all the necessary training “in house”. They both also cited lack of time and funding as significant barriers.

Approximately 20% indicated that they didn’t know where to go for external training provision

The responses from non-users of external training suggest that, irrespective of the quality of provision, they are unlikely to use external training due to cost concerns. However, this still leaves about 60% of organisations who do use external training and it is important to understand their perceptions of the quality of this provision.

Those manufacturers who do use external training provision were asked to rate the ease of finding local training and skills providers (Figure 11).

As expected, local provision of furniture specific courses is hard to source. However, of more concern, almost 50% stated that apprenticeships are difficult to find. Apprenticeships will be addressed later in this report (Section 4.4).

University, day release and block release courses are also relatively difficult to source at a local level.

Retailers reported similar sourcing issues (all be it the sample numbers were comparatively lower) with the exception of tailor made courses which are slightly easier to find (Figure 12).

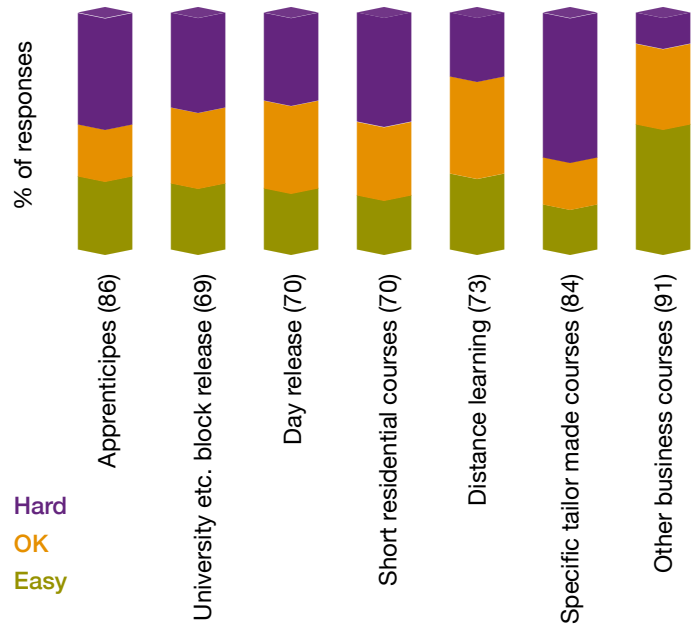


Figure 11. The ease of finding local and external training providers for manufacturers (number of respondents shown in parentheses)

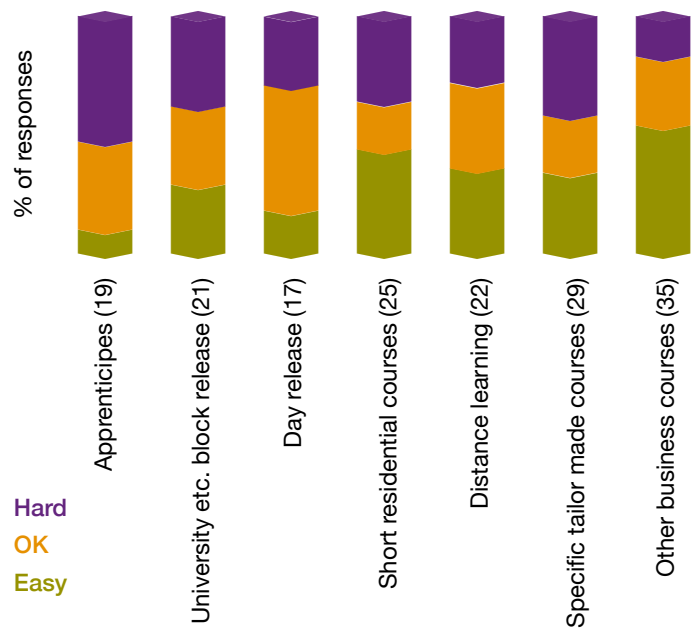


Figure 12. The ease of finding local external training providers for retailers, distributors and importers (number of respondents shown in parentheses)



When questioned about the quality of training provision, manufacturers feel that tailor-made, distance learning and other furniture related courses generally meet skills requirements either “adequately” or “well” (Figure 13). Day and block release courses are less well received, with just over 20% considering that these training provisions meet skills requirements poorly.

Almost 30% of furniture apprenticeships were considered not to provide all of the necessary skills.

In the context of this whole question, it could be argued that furniture specific training provision generally meets skills requirements, but that there is some room for improvement.

When questioned about general training provision (i.e. not furniture specific), responses, whilst not exactly mirroring those for furniture, were similar (Figure 13).

It is difficult to draw meaningful conclusions for retailers as some of the course category responses only numbered between 4 and 10. Where there were slightly larger sample numbers the large majority of respondents feel that tailor made and other business courses, whether furniture specific or general in nature, meet requirements adequately or well.

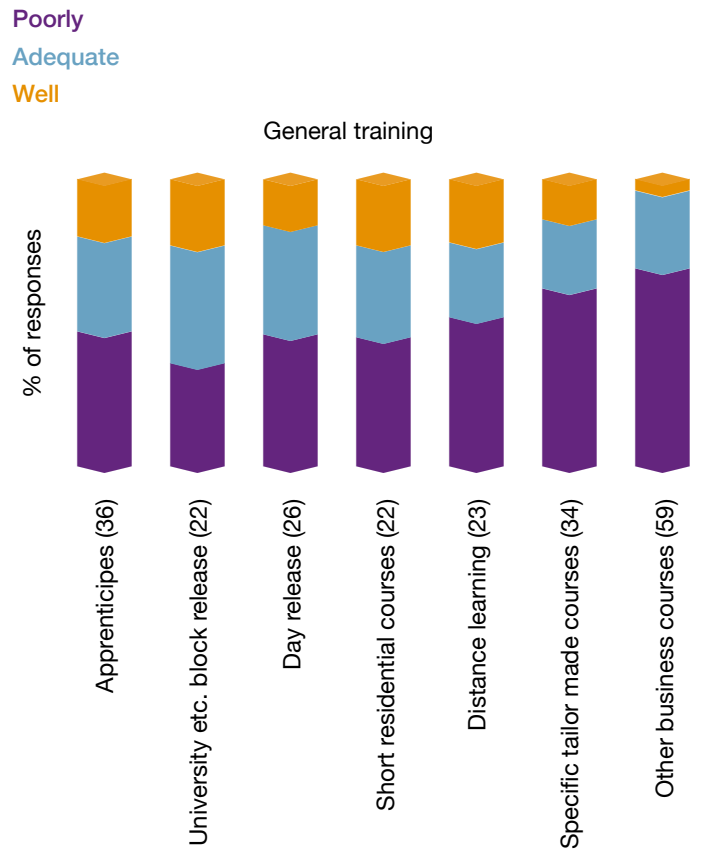
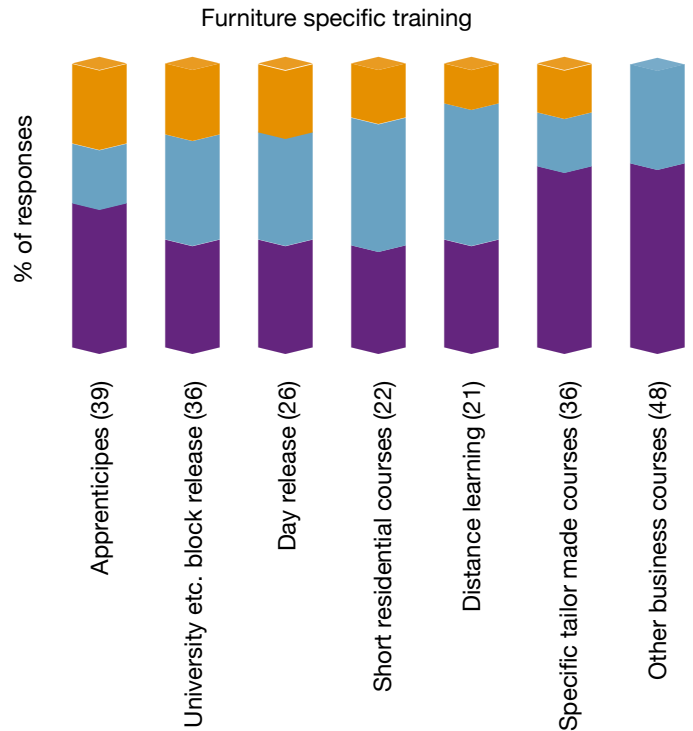


Figure 13. The extent by which various furniture specific and general training sources met manufacturers’ needs (number of respondents shown in parentheses)

## 4.4 Apprenticeships

### 4.4.1 Introduction

UK furniture manufacturing, despite investments in modern production technologies, places significant reliance on “craft based” skills. The specific skills required tend not to be taught within schools and, as such, industry is reliant on provision from other sources.

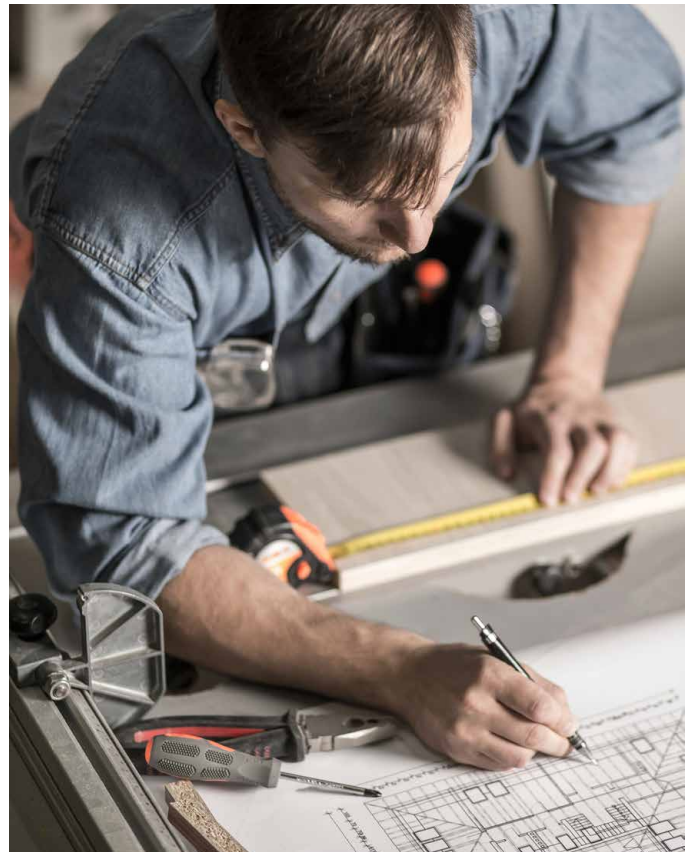
Apprenticeships are one of the sources for such skills provision, and indeed cover more than just craft based skills. There has been a recent upsurge in their popularity sponsored by an increasing recognition by Government of their value to UK manufacturing and services sectors.

UK furniture manufacturers have made great strides in this area with the achievement of “Trailblazing” status (a mechanism that provides for the development of national, employer led, formally recognised apprenticeships for industry). As such, the furniture industry’s attitude to, and perception of, apprenticeships formed a significant part of the survey

### 4.4.2 Employment of apprentices by manufacturers

Only 34% of manufacturers currently employ one or more apprentices although a further 16% recognise a need but didn’t know how to find an apprentice (Figure 14). This means that almost half of all respondents don’t need apprentices. As previously discussed (Section 4.3.2), these statistics don’t reflect national data which indicate that just over 8000 furniture manufacturing companies employ 400 apprentices per year (this discrepancy is due to the skewed nature of the survey sample).

A developing recognition of the importance of apprenticeships is supported by the fact that 61% of manufacturers feel that they would consider taking on an apprentice within the next year (compared with 34% currently employing apprentices). 19% stated definitively that they would not take on an apprentice and 20% were undecided.



I currently employ apprentices

I currently don't need apprentices

I currently need apprentices but don't know how to look for them

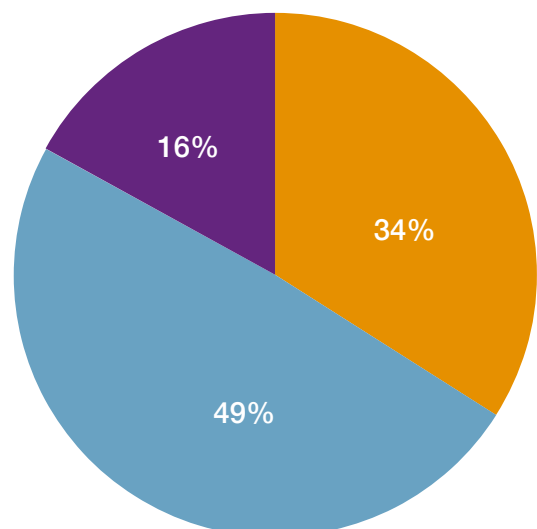


Figure 14. Manufacturers’ employment of apprentices (97 out of a total of 123 respondents)

Those who rejected the concept of apprenticeships (19 out of 102 responses) for their businesses cite lack of time to mentor and cost as being the main inhibitors. A number of other reasons were given such as:

- A lack of understanding with regards to the process of recruiting apprentices;
- The small size of a new business;
- No requirement for an apprentice within the business;
- The lack of availability of suitable apprenticeship candidates.

#### 4.4.3 Employment of apprentices by retailers, distributors and importers

Figure 15 illustrates that, compared to manufacturers, furniture retailers place much less importance on apprenticeships, with only 24% currently employing apprentices and 71% stating that they don't have a need.

The results of the survey suggest that retailers also recognise the increasing potential of apprenticeships for their businesses, with 42% stating that they would consider taking on an apprentice within the next year. However, 32% still reject the idea and 26% remain unsure.

The reasons cited for not taking on apprentices (11 responses) are similar to those for manufacturers such as the company being too small, lack of time to mentor and no perceived business need.

**I currently employ apprentices**

**I currently don't need apprentices**

**I currently need apprentices but don't know how to look for them**

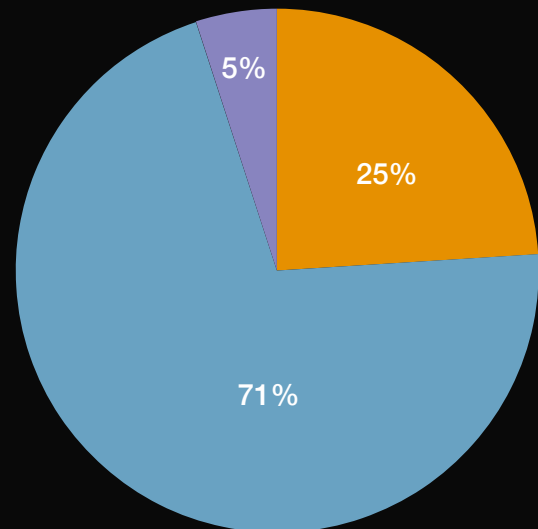


Figure 15. Retailer, distributor and importer employment of apprentices (38 out of a total of 51 respondents).



#### 4.4.4 Breakdown of apprenticeships

Manufacturers benefit from a number of apprentice skills. Primarily, 22% are employed for general office administration, 19% as machinists, 15% as upholsterers and 5% for furniture design.

In addition to these, companies identified the following other apprenticeship roles:

- Finishers and polishers;
- Leather technologists;
- Maintenance technicians;
- Logistics;
- Supply chain management and buying;
- Cabinet Makers;
- Tape edgers, general assembly;
- General furniture technologists;
- Multi purpose;
- Engineering – Mechanical and electrical;
- Toolmakers;
- Customer service;
- Warehousing;
- Machine technician;
- Lab assistant;
- Feeder.

This wide range of apprenticeship needs poses challenges for those designing programmes that will meet furniture manufacturers' immediate requirements, although the concluding sections of this report clarify that there needs to be a focus on the most significant skills shortages.

Responses relating to the number of apprentices within the retail sector were too low to draw any significant conclusions.

#### 4.4.5 Finding the right apprentice

Manufacturers who employ apprentices tend to source them via a wide range of organisations. The 21 companies who responded to this question identified 22 different organisations ranging from schools and colleges through to specialist providers and the national apprenticeships online portal.

Should a consolidated apprenticeship strategy for furniture manufacturing be deemed beneficial, consensus may prove difficult when trying to engage with a large number of different providers. However, this argument needs to be balanced with the need for apprenticeships to be delivered nationally and for all the occupational areas identified in the Trailblazer to be covered.

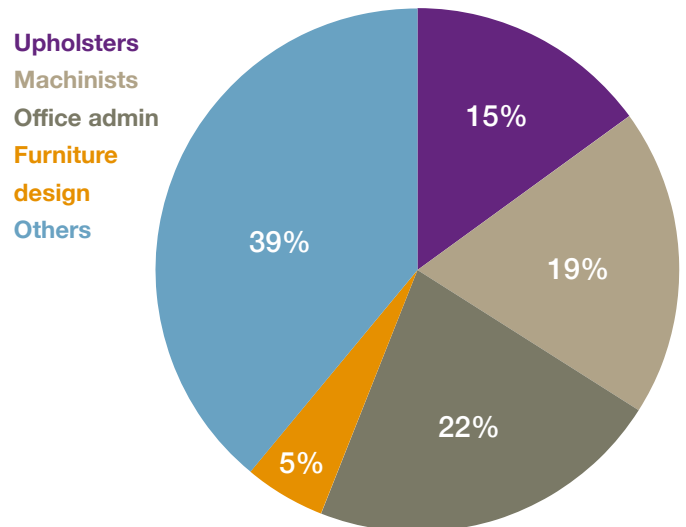


Figure 16. Types of apprentices employed by manufacturers (33 out of a total of 123 respondents)



## 4.5 Skills retention

The issue of staff retention was not addressed quantitatively within the questionnaire. However, subsequent validation sessions suggested that staff retention can be difficult. This is supported by the fact that many manufacturers and retailers state that they rely on the tactic of trying to attract experienced individuals who are working for competitors.

The subject was discussed during working group validation meetings and it was felt that companies would have greater success with staff retention if managers were better equipped to engage with new employees, particularly, though not exclusively, youngsters and apprentices.

In addition, of course, companies themselves, starting at board level, need to be committed fully to the training programmes required to produce a skilled workforce. This is not an easy issue to address as it not only requires the development of people managing skills in its own right, but will also involve cultural change.

One example of this cultural dilemma is illustrated by the fact that almost half of manufacturers feel that their businesses are unattractive to youngsters, with a further quarter either not knowing, or not having an opinion. Staff retention and attracting new individuals of the right calibre will be an uphill climb if the recruiters themselves have such a negative perception of their own companies.

Retailers are much more optimistic about their own organisations. Their perceptions are in stark contrast to manufacturers with 75% feeling that their businesses are attractive to young people.

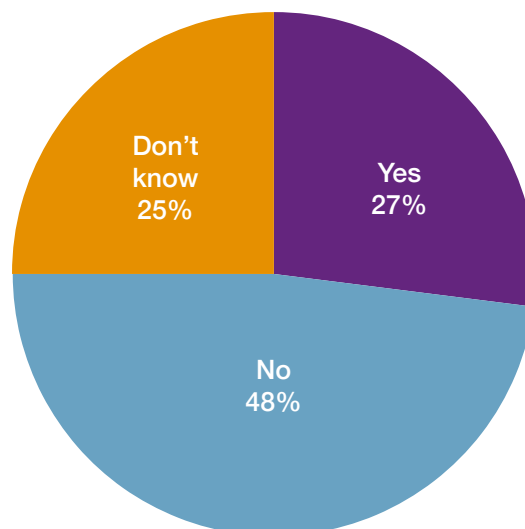


Figure 17. The perception of manufacturers with regards to the attractiveness of their businesses to 'young people' (102 out of a total of 123 respondents)

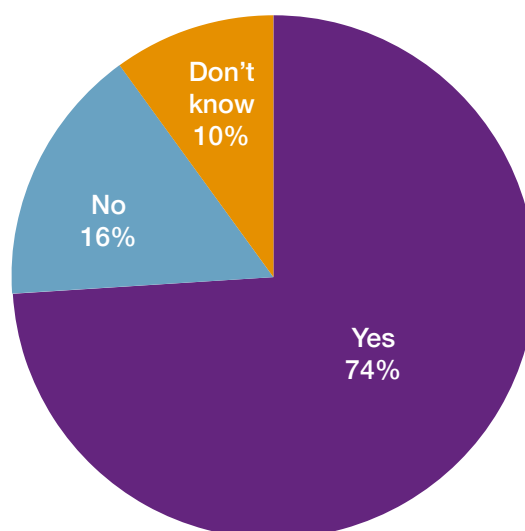


Figure 18. The perception of retailers, distributors and importers with regards to the attractiveness of their businesses to 'young people' (38 out of a total of 51 respondents)

# The UK furniture workforce

## 5.1 Introduction

Understanding the current demographics of the furniture industry will help ensure that any future training strategies are relevant to the organisations concerned and, more specifically, to the workforce itself.



## 5.2 Age profile

Furniture manufacturers forecast a worrying trend in relation to the age profile of their workforce. There is already a heavy bias towards older employees, with 85% stating the average age as being between 31 and 50 (Figure 19). The predicted trend is that, in five years time, the average age of the workforce will increase, with 20% of manufacturers feeling that it will be between 51 and 60 years and 46% between 41 and 50 years.

These data correlate closely with those from the Government's own Labour Force Survey which indicates that, in 2014/15, 47% of furniture manufacturing employees are aged between 36 and 55 (Figure 20).

Interestingly, the age profile peak is in a slightly younger age band than in 2008/9, although when comparing combined age bands (36 to 55), there is little difference between the two periods in question. In addition there are slightly less young people, and a few more 55+ people than in 2008/9.

More detailed analysis of Government data for 2014/15 reveals that the manager's age profile is higher (63% aged 36 to 55) than those for skilled trades and process / machine operators. This might be expected, but, in addition, it is still concerning to note that 40% of machine operators are over 50.

The average workforce age within the retail sector is considered to be slightly younger than for manufacturers with 75% feeling that their workforce is between 31 and 50 years of age and less than 10% stating that it is between 51 and 60 years old (Figure 21).

The forecast, as for manufacturing, is that this average age will increase slightly in five years time.

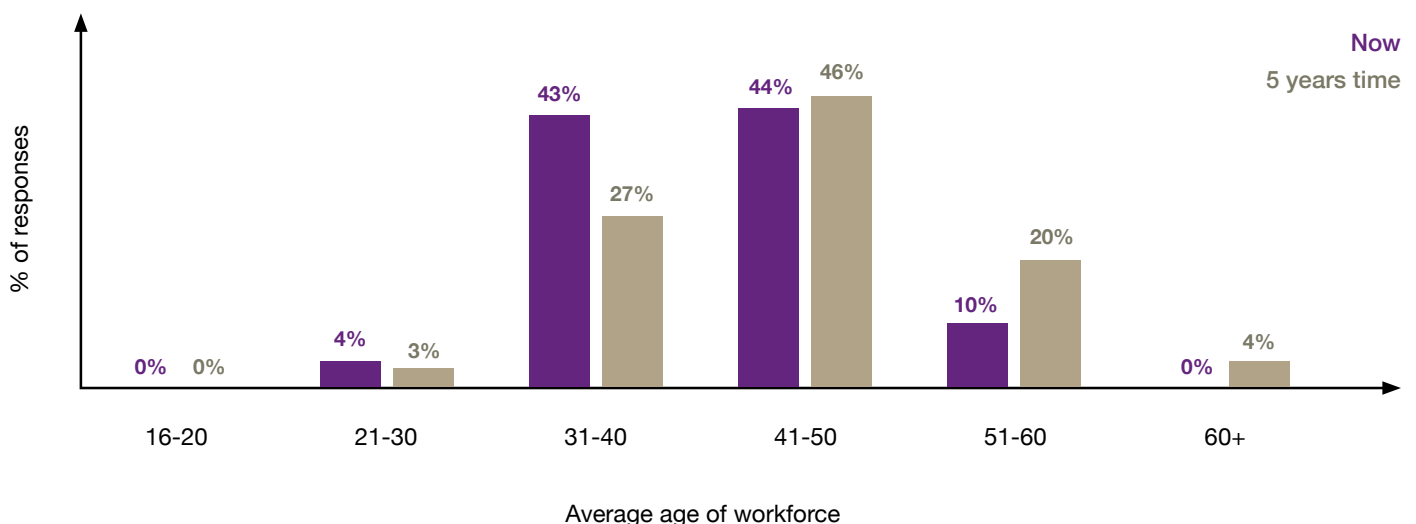


Figure 19. Current and future average age profiles of manufacturing employees (Based on 101 and 100 out of a total of 123 respondents)

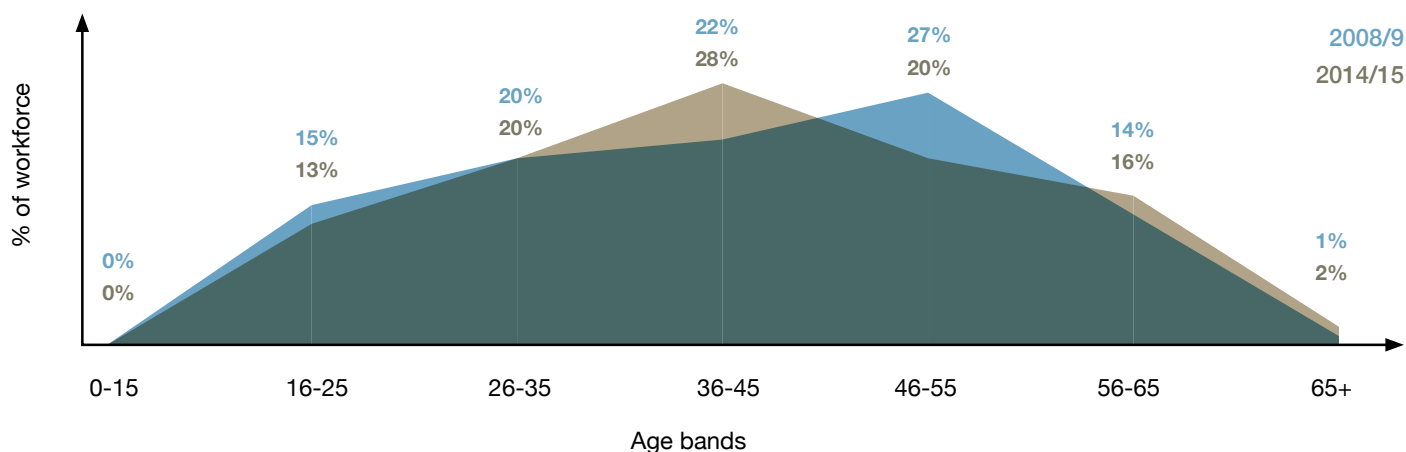


Figure 20. Age profile of furniture manufacturing employees in 2008/9 and 2014/15

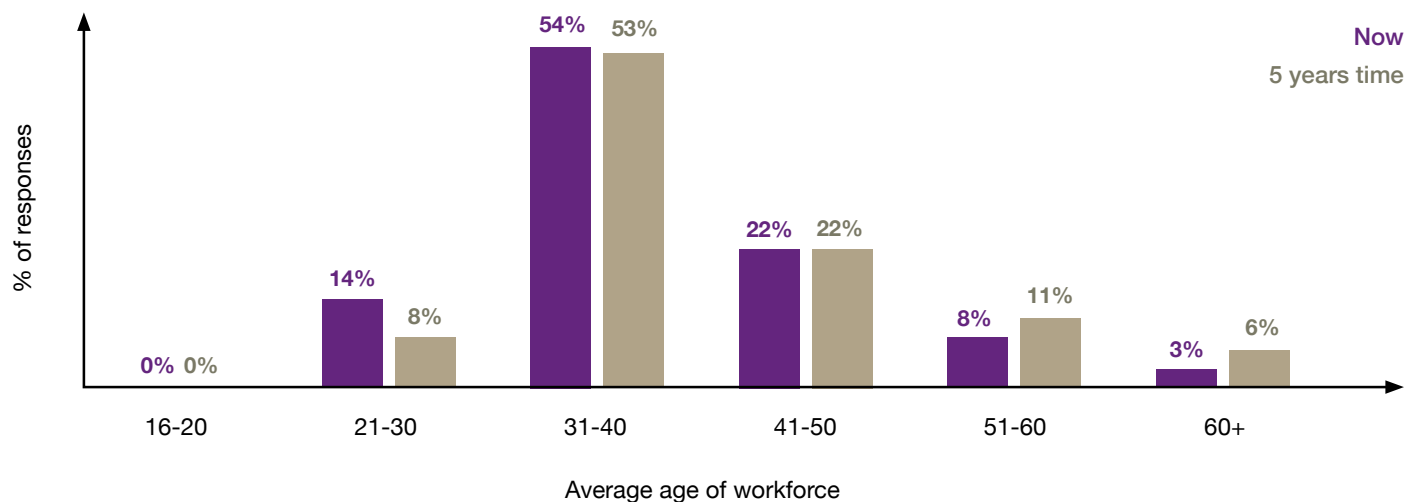


Figure 21. Current and future age profiles of retail/distributor/importer workforce (38 and 37 out of a total of 51 respondents)

### 5.3 Workforce nationalities

Anecdotal evidence suggests that the UK furniture industry is becoming increasingly reliant on non-UK nationals to provide necessary manufacturing skills.

67 of the 102 respondents have a workforce that is predominantly (76% to 100%) UK national based, with 23 companies having between 51% and 75% UK nationals. The remaining 12 companies have more non-UK than UK nationals in the workforce.

One manufacturer feels that it is easier to recruit non-UK nationals but several point to business inhibitors such as language barriers and the need for more processes when operating with larger numbers of non-UK nationals. This, in itself, highlights potential training needs that would not have been deemed necessary in the past. Retailers consider that they employ more UK nationals than manufacturers, with 34 out of 36 respondents stating that their workforce comprises between 51% and 100% UK nationals.

## 6.1 Introduction

Knowledge of the current skills and training landscape is critical in terms of immediate strategies and actions that will improve the competitiveness of furniture manufacturers and retailers. However, of equal, if not more importance is an understanding of future needs and attitudes.

Foresight five years into the future was a key element of the questionnaire and addresses issues such as:

- Business growth predictions;
- Future skills and training needs;
- Longer term attitudes to apprenticeships.

## 6.2 Business growth

Industry's opinion of its future prosperity is critical to the development of training and skills strategies as it informs predictions for future workforce demands.

One third of manufacturers feel that turnover will not increase, or will fall, in five years time. In effect, due to inflation, this represents a net decrease in output. 40% are slightly more optimistic about future turnover prospects, citing an increase of up to 30%, although, in reality, again taking inflation into account, this reflects a relatively mediocre performance.

Only 13% of companies predict the equivalent of annual double digit percentage growth over the next five years.

These results suggest that very few companies have growth at the core of their business strategies.

Retailers are slightly more optimistic than manufacturers with 23% (compared to 13% for manufacturers) anticipating five year growth to exceed 61% and only a quarter expecting turnover to be static or to drop.

## 6.3 Skills shortages in 5 years time

Despite the relatively pessimistic view of the future, manufacturers will still need to be able to source the right skill sets if they are to be successful. When questioned about future needs, no significant differences between current and predicted skills shortages were identified.

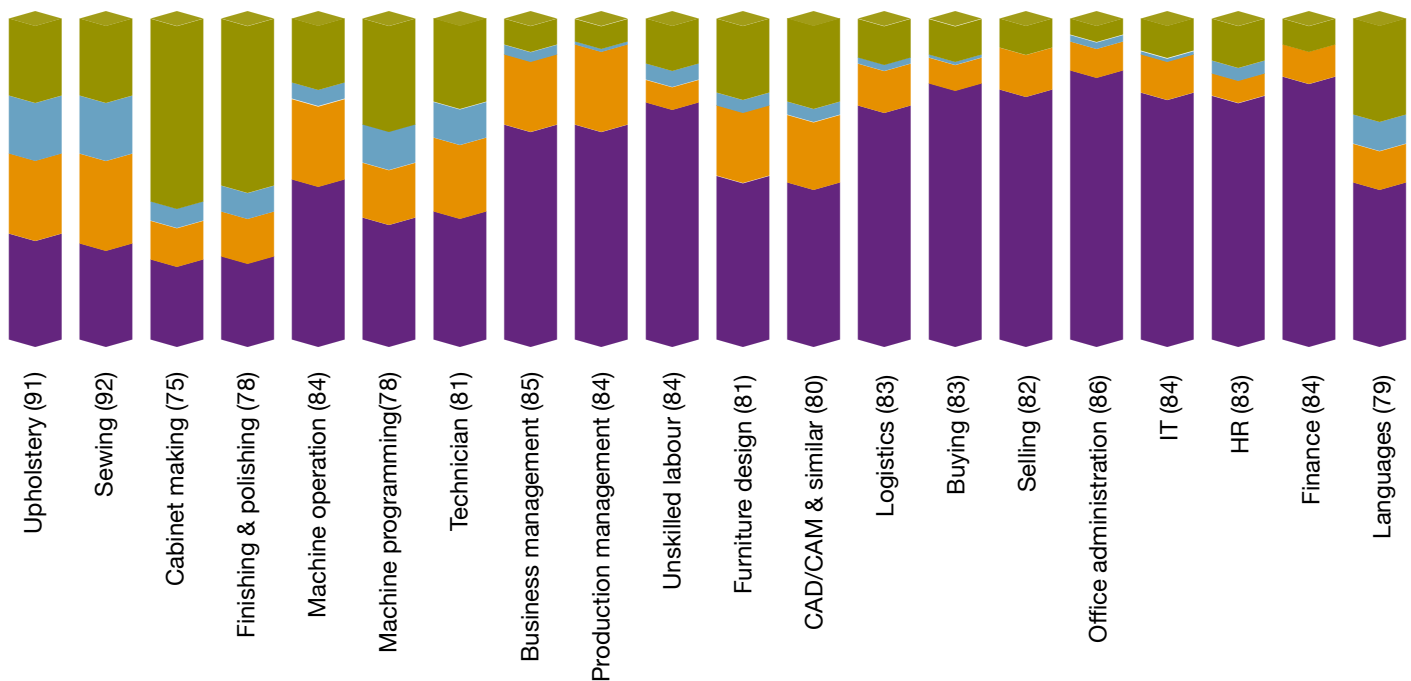
Upholstery and sewing skills (43% and 46% of responses indicating significant or small shortages respectively) remain at the top of the list (Figure 22). After this, machine programming, machine operation and technician (skilled in all aspects of equipment operation, setting up & maintenance) skills are predicted to be future shortages of some sort. It could be argued that each of these represents a similar type of "machining" skills set.

Other projected skills requirements are as follows:

- Business management;
- Production management;
- Furniture design;
- CAD/CAM.



**“There remains a dreadful shortage of skilled cutters and sewing machinists----- most upholstery training only covers this in a cursory way yet it is fundamentally important-----I can see no sign of this situation changing in the next five years and it will become increasingly damaging ----”**



Significant shortage

Small shortage

Skill not required

About right

Figure 22. Percentage breakdown of manufacturers' predicted skills requirements in 5 years time (number of respondents in parentheses)

Some respondents feel that other, non-listed skills shortages will need to be addressed, the most popular being:

- 3D Printing, modelling and component detailing;
- Knowledge of newer technologies, software and modern processes;
- Senior management skills due to age profile of existing team;
- Auditing and quality management.

Similar to manufacturers, retailers draw little distinction between current and future skills shortages / requirements. Furniture technologists or individuals with furniture manufacturing knowledge represent the greatest predicted skills shortages (47% and 41% respectively with a small to significant shortage as illustrated in Figure 23).

Interestingly, these percentages are significantly lower than their comparable current skills shortages (65% and 62% respectively).

Production management and CAD/CAM skills are also identified as likely areas of skills shortages but only by 23% and 27% of respondents respectively.

Other responses included:

- IT business support packages and technical packages;
- Knowledge of new technologies.

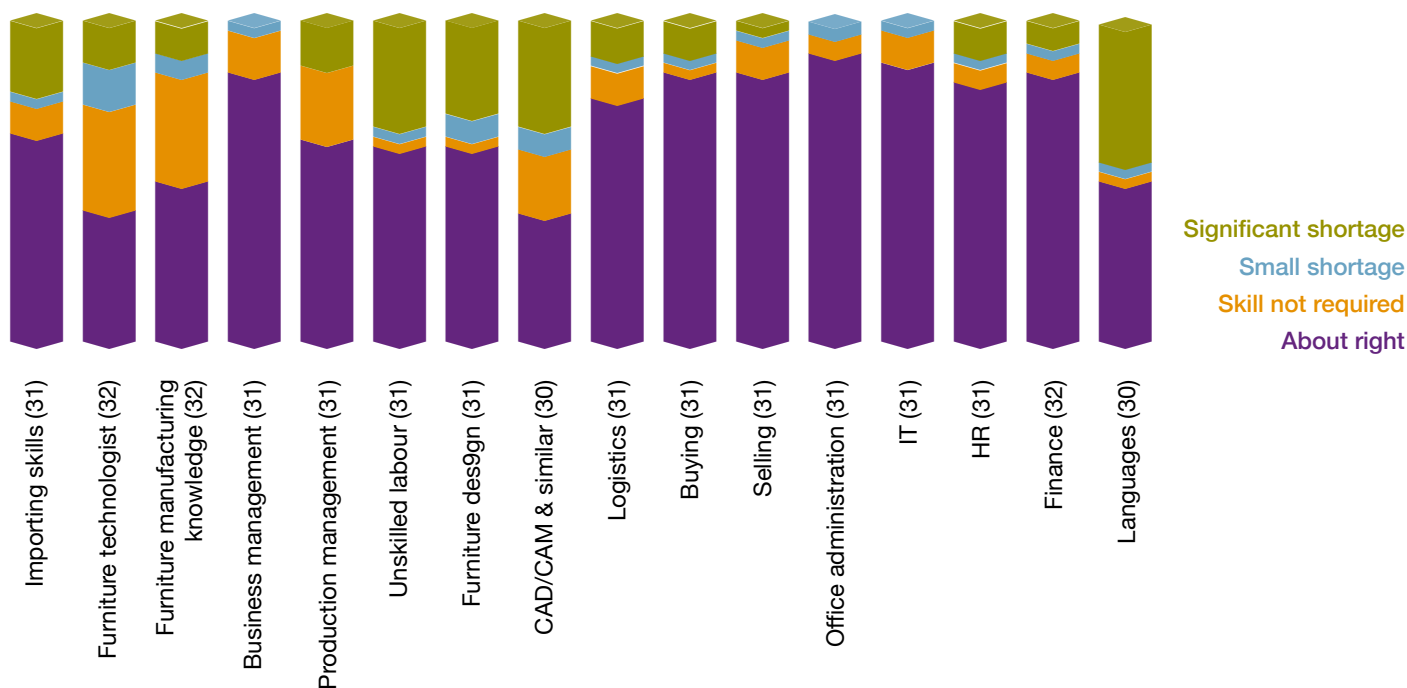


Figure 23. Percentage breakdown of retailer, distributor and importer predicted skills shortages in 5 years time (number of respondents in parentheses)

## 6.4 The future of apprenticeships

The increasing recognition of the potential that apprenticeships offer a business was confirmed when companies were asked whether they envisaged employing apprentices in the next five years. 76% of manufacturers state that they would, with only 20% feeling that they would not (4% were undecided).

Retailers were far more circumspect with only 58% stating that they would consider taking on apprentices in the next five years and 8% stating that they would not. 34% were undecided.

For both categories of company, these responses represent a much greater acceptance of the future value of apprenticeships compared to current practices where only 51% of manufacturers and 29% of retailers currently employ (or need) apprentices.



▲ [Back to contents page](#)

6.0



# Where are the gaps?

## 7.1 Introduction

The aim of this section is to combine anecdotal opinion with some of the main findings of the survey and to formulate a series of key issues which, if addressed, will have a significant positive impact on the furniture industry's skills environment. Much of the data within the report can be used to inform the more detailed future actions needed to close these gaps.

## 7.2 Relationships with schools

Skills development starts early, and influencing youngsters prior to leaving school will increase the pool of talent available to industry.

Validation sessions highlighted the importance of encouraging potential, future employees to recognise the value and enjoyment that can be gained from a career in furniture manufacturing, design and retail. A huge range of career choices are open to school pupils and, if the furniture industry wishes to attract the best of these individuals, it needs to take concerted actions to ensure that it has a highly visible profile.

There are some industry initiatives aimed at strengthening the link with schools such as Proskills' "Make It" and the WCFM's distribution of 900 books on British furniture design as prizes for each school's best GCSE design and technology student.

However, the survey illustrates that engagement at this level warrants significant improvement (particularly the interaction between companies and their local schools and colleges).

Greatest impact will not be achieved by relying on individual companies to devise their own interactive approaches. It will require a coordinated, nationwide schools programme incorporating elements such as:

- Teacher's notes;
- DVDs;
- Company tours;
- In school assistance;
- Profile raising promotional material;
- Prizes;
- Co-ordination with local colleges.

....to name but a few.

## 7.3 Focusing on the main skills gaps

It is clear that skills shortages impact significantly on the performance of UK manufacturers and retailers, with 16% declaring that they have lost business and 43% that output has been constrained as a result of not having adequate skilled personnel.

There is a temptation to try to resolve all of the current and potential future skills shortages. However, greatest impact would be gained by focusing on the most significant problem areas. These are clearly identified for retailers and manufacturers, in order of priority, as follows:

Table 2. Current skills shortages of greatest importance

Manufacturers	Retailers, distributors and importers
Upholstery	
Sewing	
Machine operation	
Technical machine skills and programming	
Finishing and polishing	
Production management	Production management Specifically furniture manufacturing
Furniture design	Furniture design
CAD / CAM	CAD / CAM
Legislative / technical issues	Legislative / technical issues

The furniture industry's Trailblazer has made great strides in the development of approved apprenticeship standards. Current and planned standards reflect many of the skills shortages identified within this survey and are summarised within the following list:

**Approved standards:**

- General manufacturer (Cabinet making, etc);
- Bed maker;
- Modern upholsterer.

**Standards due for approval in October 2015:**

- Furniture finisher;
- Fitted furniture installer;
- Furniture restorer;
- Wood machinist;
- Furniture CNC specialist.

**Standards under development:**

- Service repair;
- Foam conversion and upholstery cushion interior manufacture.

These standards are geared towards Level 2 in the National Vocational Qualification hierarchy. There is still more work to be done at higher levels (3 and 5) to cover key skills shortages such as:

- Level 3: CAD/CAM, Furniture design, Furniture production
- Level 5: Furniture design, Production management

Industry champions are needed to further the development of these skills, standards and assessment materials in consultation with all stakeholders.

When dealing with new graduates, the anecdotal implication is that most companies would not expect to be able to recruit individuals with specific furniture production skills. Many companies are happy to take on graduates with a range of degrees (logistics, engineering, business, product design, furniture design and mathematics have been specifically noted, but many others are also deemed acceptable) and develop them as appropriate.

However, there are some notable exceptions to this:

- A significant number of manufacturers feel they would benefit from graduates with general Production Management skills. This particular graduate / post graduate qualification doesn't seem to be common place.
- The consensus is that designers should be trained to design and, that whilst a rudimentary understanding of the practical impacts of their designs in relation to manufacturing is important, this should not be taught to the detriment of "flair and innovation".
- Retailers feel that their purchasing and quality functions would benefit from individuals with specific furniture expertise (most likely gained through a technical grounding in design and manufacturing).

The tabulated summary (Table 2) clearly indicates that there is a significant degree of commonality between retailer and manufacturer requirements (particularly at levels 3 and 5), but this doesn't appear to be positively accounted for under current skills provisions. There is scope for more collaboration between these two sectors.



## 7.4 Quality of provision

The general perception of respondents was that, whilst the quality and content of external skills and training provision was adequate, in certain areas, such as apprenticeships and tailor-made courses, there was more room for improvement.

The survey certainly didn't indicate that there was a major problem with the current training providers but it is suggested that, by working more closely with these providers, and by "tweaking" course content and delivery, there is scope to improve and enhance the perceptions of manufacturers and retailers.

## 7.5 Understanding and developing apprenticeships

The Government has a stated aim to increase apprenticeship provision during its current term. UK furniture manufacturers currently employ 400 apprentices per year and the survey indicates that this is set to increase over the next five years. In addition, as reported earlier, the development of employer led apprenticeship qualifications through furniture's Trailblazer initiative is beginning to reap rewards.

There is, however, much more to do. General understanding of how modern apprenticeships work is poor, with many companies stating that they don't know where to go, or what to do, to find apprentices. Companies also tend to misunderstand pay structures, bonus payments and other employment issues associated with apprenticeships.

Despite the survey's generally positive responses to current and future apprenticeships, the reality is that a manufacturing industry comprising 8000 companies and 115000 thousand individuals, only employs 400 apprentices per year. A greater commitment to the development of youngsters' skills will have a long term benefit for individual companies and encourage a stronger, more effective training support structure for the future.

The Trailblazing initiative, largely developed in the Northern Powerhouse, needs to be extended throughout the country which, with the wide range of training providers and colleges, will require a co-ordinated approach.

## 7.6 It's not all about apprentices and qualifications

Evidence from the survey indicated a preference for the recruitment of older (i.e. above the age of 25) individuals. There needs to be mechanisms in place to ensure that these individuals, and existing employees within companies, can access training appropriate to their particular roles.

This could be achieved through a number of mechanisms including making approved apprenticeship qualifications available to a wider audience, perhaps in modular format. These would not result in formal apprenticeship qualifications but the skills taught would be invaluable both to the individuals and their employers.

There is a significant role for specialist training courses delivered by trade bodies, specialist training organisations, colleges and universities. These impact on day to day business, tend to be legislative or specialist and technical in nature and are also topical. Current examples of such courses include:

- EU Timber Regulations (EUTR);
- Fire Safety Regulations;
- Environmental legislation;
- Testing requirements;
- General Product Safety Regulations (GPSR);
- Management, sales and personal development training.

**Some managers find it hard to come to terms with modern apprenticeships – "It's not like it was in my day"**

“I don’t fully understand what apprenticeships are all about, what are available, how to source them and how they might enhance my business.”



## 7.7 Location, location, location

Whilst the number of respondents to the survey makes data analysis by regions impractical, anecdotal evidence from a number of sources indicates that a company's location has a significant effect on its inability to find and train new staff because:

1. Employment levels are high and there is more competition from other employers.
2. More youngsters opt for the further education route rather than seeking work / apprenticeships.
3. There is no local training provider.

These companies would still benefit from employing an engaged workforce and from developing the necessary skills within that workforce.

Some solutions to this problem may include:

- More flexible approaches to training and apprenticeships by providers such as taking the training to the students rather than the students to the training;
- Use of distance learning and technology;
- Regional collaborations amongst companies (sharing apprenticeships and other training courses);
- Improved engagement with local schools and colleges.

## 7.8 Recruitment and training culture

Responses to some of the questions, and something that figured significantly during the validation sessions, suggest that many of the negative problems attributed to the employment of new recruits can be resolved through better selection and sifting of applicants, and also by interacting more successfully with individuals once they join the workforce. "Cultural change" is a phrase that is sometimes met with a degree of cynicism, but small changes will reap greater rewards. Many companies employ excellent practices and these need to be communicated and shared. Specifically, best practice guides for the following would be beneficial:

- Writing and implementing a training plan;
- Interviewing and selecting the right individuals;
- How to retain a committed and effective workforce.

This wasn't necessarily identified as a skills gap in the survey but training courses for managers and supervisors on how to deal with school leavers and other recruits would help with retention.

For example some anecdotal evidence suggested poor ethics and attitudes to work, especially from youngsters. However, the quantitative survey results indicated that this was rarely the case. Improvements might accrue with better treatment, understanding and relationships with these youngsters.

Sourcing non-UK resident labour is seen, anecdotally, as an issue. This is only the case for a small percentage of companies but it creates its own impacts such as:

- A little bit like football, if manufacturers and retailers rely on imported skills there will be fewer opportunities to develop their own youngsters;
- The need for language training;
- More complex employment and management issues.



## 7.9 Ageing workforce

It is clear from this project and Government statistics that the furniture manufacturing industry expects to have a workforce with a greater average age in 5 year's time than it has now. This is a real cause for concern as 45% of companies reported an average workforce age of 41 to 50 and with a current preference for employing the older individual this ageing effect will be compounded.

Anecdotal evidence suggests that companies will be stimulated to employ more youngsters in conjunction with the development of more effective, better understood training provision. This reinforces the importance of being able to facilitate the introduction of these individuals into companies, thus encouraging organisations to embrace the system rather than feeling that they have to keep jumping over unexpected hurdles.

## 7.10 Working with Government

The furniture industry needs to develop a focused skills and training strategy that will function at a practical level within national structures. This report provides the necessary ammunition. It needs to communicate this strategy clearly (using the British Furniture Confederation as a conduit) and to work with Government to ensure that potential difficulties and problems are addressed.

**“Younger people tend to be overlooked in preference to older skilled people. This is a particular issue with small companies who feel that they cannot afford to train individuals who might then leave for more money elsewhere.”**



# Single point of contact

The furniture manufacturing industry is beginning to take positive steps in terms of its skills and training needs. In addition, manufacturer / retailer relationships continue to improve, with many shared perceptions of the types of individuals that will deliver future success.

However, the underlying concern is that, whilst many initiatives exist throughout the sector, there doesn't appear to be any one organisation responsible for a co-ordinated, consistent, national approach.

A champion (or possibly champions) is needed to address the gaps identified in Section 7 of this report, whereby clear actions are identified and acted upon so that:

- A schools engagement policy is implemented;
- Industry is no longer confused about the availability of skills provision;
- There is clarity behind the employment of apprentices resulting in more apprentices with the right skills sets;
- There is support for the Trailblazer group to help spread the message of apprenticeships to the whole industry;
- The dialogue between training providers and industry thrives, resulting in courses that fully meet manufacturers' and retailers' expectations;
- Effective regional initiatives are rolled out nationwide;
- Resource sharing is initiated where required (e.g. regional shortages of colleges, potential employees);
- Best practice is communicated;
- Industry becomes much more engaged with mechanisms supporting the training of a skilled workforce;
- The furniture industry maintains a regular training and skills dialogue with Government and the Department of Business Skills and Innovation (BIS).

# Appendices

▲ [Back to contents page](#)



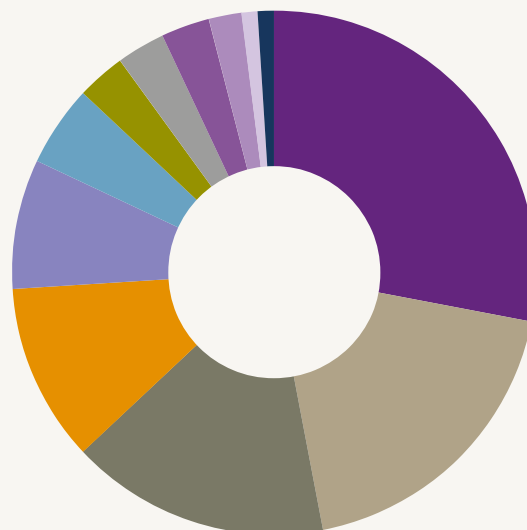
# Breakdown of responses

[▲ Back to contents page](#)

Industry opinion to the online survey was sought primarily using manufacturer and retailer contacts of the sector's following trade bodies:

- Worshipful Company of Furniture Makers
- Furniture Industry Research Association
- British Contract Furnishings Association
- British Furniture Manufacturers Association
- National Bed Federation
- Leisure and Outdoor Furniture Association
- The Furniture Ombudsman

The following figures summarise the breakdown of responses:



## A1.1 Manufacturers

96 companies fully completed the survey and 27 companies partially completed the survey. The breakdown in terms of industry sub sector (office, contract and domestic) broadly reflects the current industry demographic.

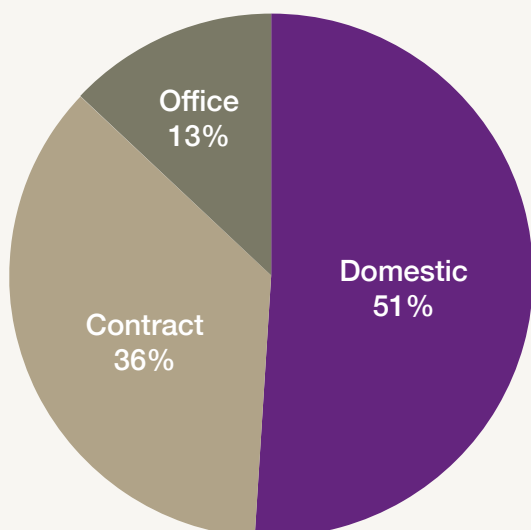


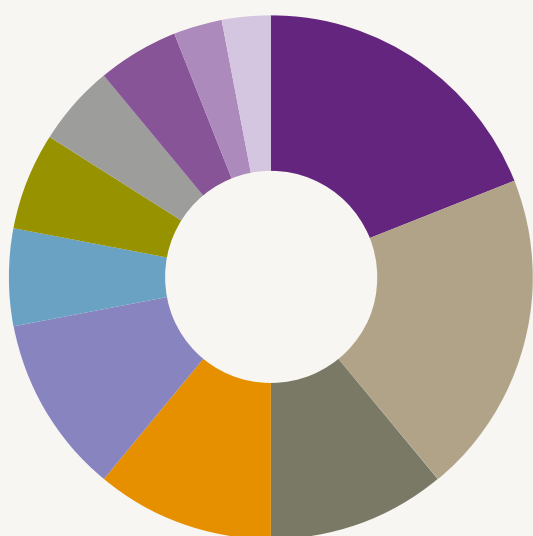
Figure A1. Manufacturer responses by sub sector

There was also a broad representation of product types, with upholstery manufacturers being the main respondents, followed by manufacturers of chairs, cabinets and tables, beds and mattresses, education furniture and kitchens.

<b>Upholstery</b>	<b>28%</b>
<b>Chairs</b>	<b>19%</b>
<b>Tables and cabinets</b>	<b>16%</b>
<b>Beds and mattresses</b>	<b>11%</b>
<b>Education</b>	<b>8%</b>
<b>Kitchens</b>	<b>5%</b>
<b>General joinery and fitting</b>	<b>3%</b>
<b>Nursery</b>	<b>3%</b>
<b>Furnishing and fabrics</b>	<b>3%</b>
<b>Outdoor</b>	<b>2%</b>
<b>Other</b>	<b>2%</b>
<b>Furniture repair</b>	<b>1%</b>

Figure A2. Manufacturer responses by product

Furniture manufacturing is spread geographically throughout the UK, with no single major hub. The responses by region reflected this pattern, with the main manufacturing regions of the South East, London, Yorkshire and Humber, North West and South West being well represented. The response from the East and the Midlands was low compared to the number of companies within these regions.



<b>South East</b>	<b>19%</b>
Yorkshire and The Humber	20%
North West	11%
<b>South West</b>	<b>11%</b>
<b>London</b>	<b>11%</b>
East Midlands	6%
<b>North East</b>	<b>6%</b>
Scotland	5%
<b>West Midlands</b>	<b>5%</b>
East	3%
Wales	3%

Figure A3. Manufacturer responses by region

The number of respondents by turnover and employees did not reflect furniture manufacturing in the UK, which is dominated by micro and small to medium size businesses with only 260 companies (4.3%) operating at turnovers in excess of £5 million<sup>3</sup>.

In this survey 35% of those who responded operated at turnovers in excess of £5 million.

Whilst this doesn't reflect the nature of the furniture industry, it demonstrates that the larger organisations have a greater interest in training and skills. This is particularly important for this survey as these larger organisations are also estimated to employ over 30% of individuals working in the sector.

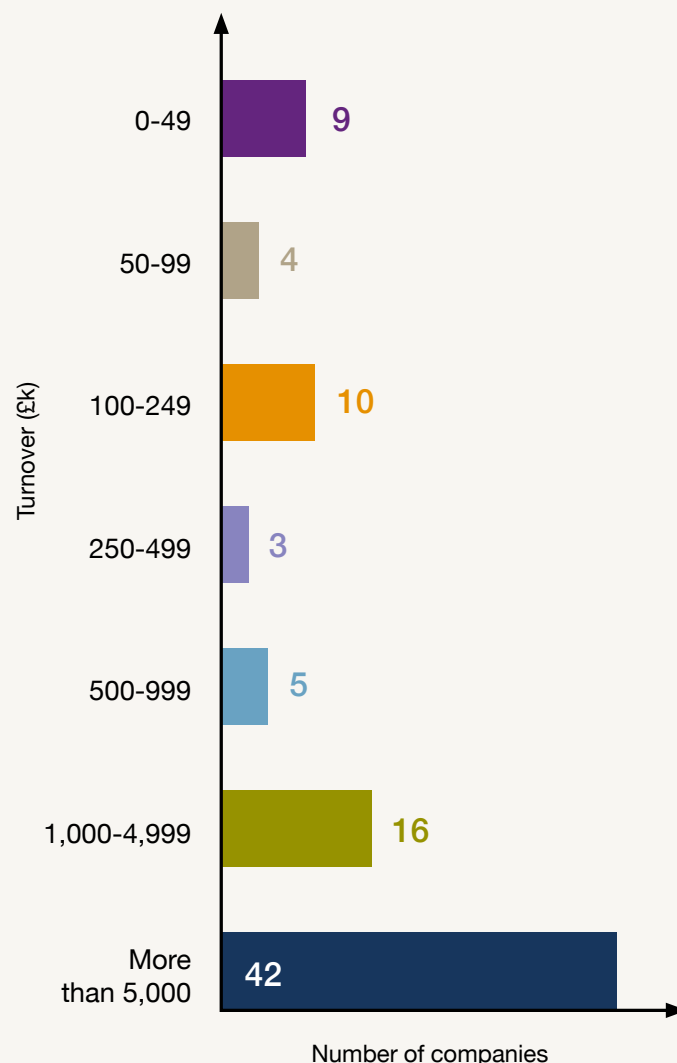


Figure A4. Turnover of manufacturers who responded to the survey

<sup>3</sup> Statistics digest for the UK furniture industry, Furniture Industry Research Association, November 2014.

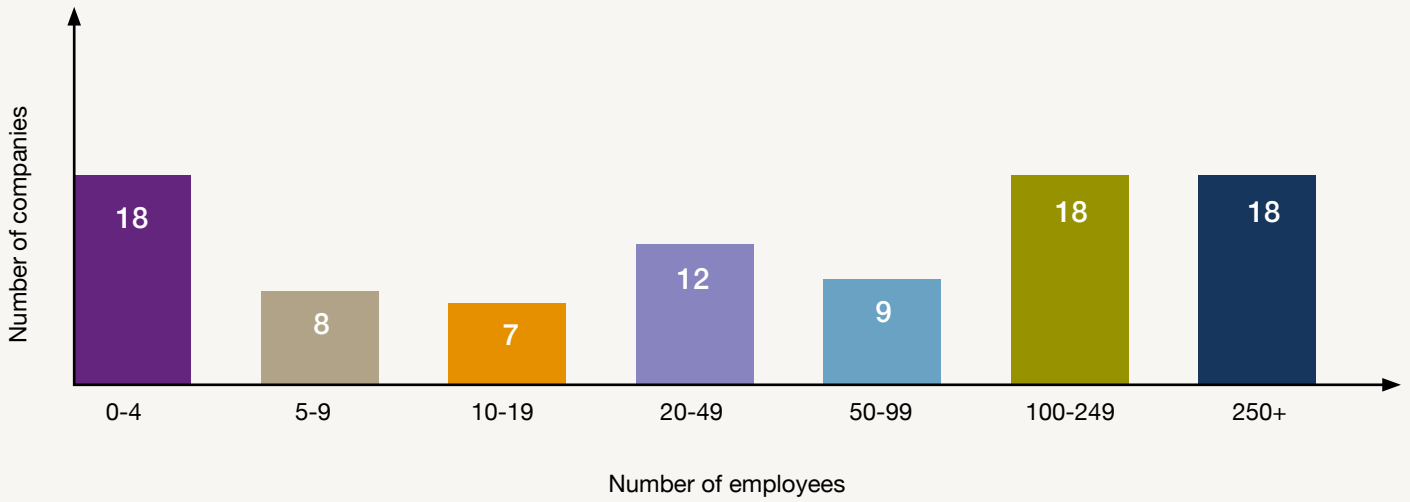


Figure A5. Employee numbers for manufacturers who responded to the survey

## A1.2 Retailers, distributors and importers

33 companies fully completed the survey and 17 companies partially completed the survey. The breakdown in terms of industry sub sector (office, contract and domestic) was similar to that for manufacturing (although, as expected, the retail of domestic product was slightly more prominent and contract furniture figured slightly lower).

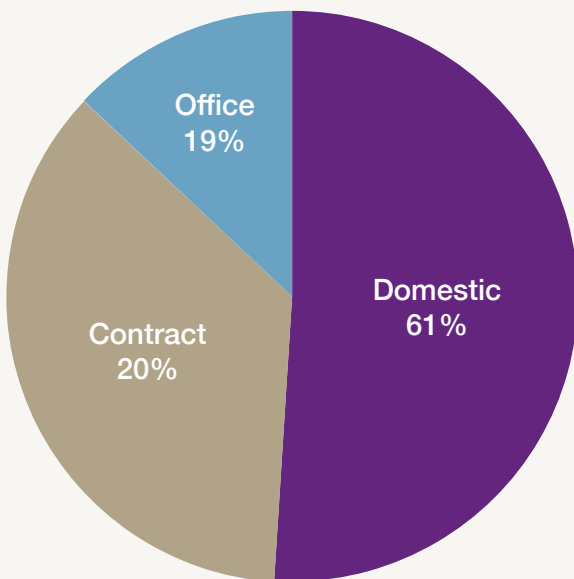
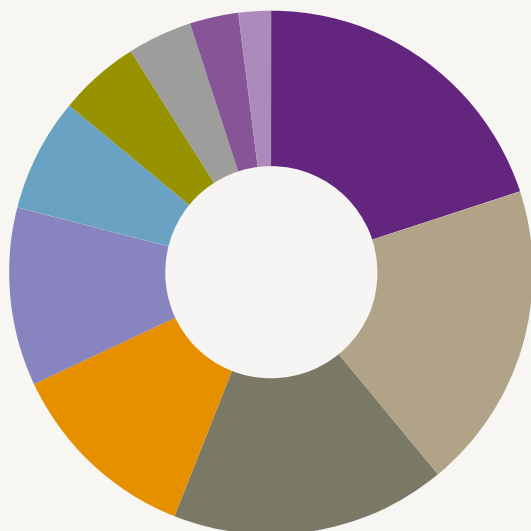


Figure A6. Retailer, distributor and importer responses by sub sector

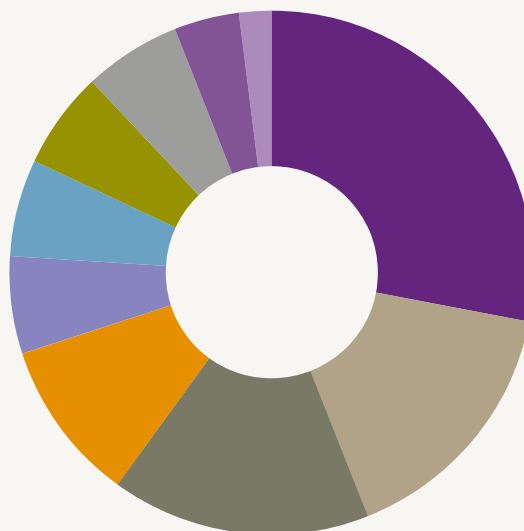
The product mix also broadly reflects that of the manufacturers, although outdoor furniture is slightly more prominent.



<b>Tables &amp; Cabinets</b>	<b>20%</b>
Chairs	19%
Upholstery	17%
<b>Beds and mattresses</b>	<b>12%</b>
<b>Outdoor</b>	<b>11%</b>
Kitchens	7%
Nursery	5%
Education	4%
Other	3%
General joinery items	2%

Figure A7. Retailer, distributor and importer responses by product

Responses by region were wide spread with London and the South East dominating (higher populations in these areas), although there were more responses from Scotland than might have been expected.



<b>London</b>	<b>28%</b>
Scotland	16%
South East	16%
<b>South West</b>	<b>10%</b>
East Midlands	6%
North East	6%
<b>North West</b>	<b>6%</b>
West Midlands	6%
East	4%
Wales	2%

Figure A8. Retailer, distributor and importer responses by region

Turnover and employee figures for retailers are less significant than those for manufacturers as the majority of respondents turned over in excess of £5 million and employed between 50 and 250+ people. The list of companies who responded reinforces this, demonstrating that a number of large “high street brand” retailers responded whereas there were few small independents who engaged with the process.

# Companies who responded to the survey

## Appendix 2

[▲ Back to contents page](#)

The authors would like to thank all those organisations who contributed by responding to the questionnaire and / or being interviewed.

A Cadeiraira	Ekornes	Nathan Furniture
Albert E Chapman Ltd	Emergent Crown	Next Retail
Alfred Tear Fine Furniture Ltd	Evoline UK (Schulte Electro Systems)	Nobia UK
Amaryllis	Fibreline Ltd	No 81 Bespoke Upholstery
Anco Storage	Flexiform	Ordhill Upholstery
Arthur Brett	Formica	Palatine Beds
Ashwood Designs Ltd	Furmanac Ltd	Peter Dudgeon Ltd
Be Seated	Furniture Repair Workshop	Pledge office Chairs
Bearsted Upholsters	G Plan	Podesta
Bedmaster	Godfrey Syrett	Premiere Furniture
Bisley	Greengate Furniture Ltd	Property Letting Furniture Solutions Ltd.
Bluebird Upholstery	Gresham Office Furniture	PWS Distributors
Blum UK	Hafele UK Ltd	Relyon Limited
Bodyease / Platinum Enterprise (UK) Ltd	Halstock Cabinet Makers	Rixonway Kitchens
Boss Design	Hands of Wycombe	Salomé Jay
Bradbury Fabrics	Harrison Spinks Ltd	ScS
Brass Tacks Upholstery Services	Heals	Sealy United Kingdom
Broadstock	Highgrove Beds Ltd	Sedilia Ltd
BUK Ltd	Home Retail Group (Argos)	Shire Beds
Burbidge & Son Ltd	Home Retail Group (Homebase)	Signature Interiors
Burgess Beds	Hutchfield Furniture Ltd	Silentnight Group
Burgess Furniture Ltd	Hyder Beds	Sleepeeze
Canburg	Hypnos Ltd	Sonnaz Uholstery

Carlick Contract Furniture	J&J Ormerod PLC	Soutar Designs
Carniture Design	Janet Potton	Spiderwood
Changing Views	JFC Group	Steinhoff UK
Claremont Centre Ltd	Jim Giddings Furniture Ltd	Stuart Jones Furniture
Claremont Office Interiors	John Makepeace Furniture	Sweet Dreams UK Ltd
Coexistence	Kayflex	Tesco
Comfortex Ltd	KI (UK) Ltd	Thames Upholstery
Community Playthings	Knightsbridge Furniture Productions	Trent Upholsteries Ltd
Community Products UK Ltd	Lebus Upholstery	Triumph Furniture
Connection Seating Limited	Little Street Upholstery	Vispring
Corinium Upholst. & Soft Furnishings	Loaf	Wendy Shorter Interiors Ltd
Curved Needle Upholstery	Louis Moreau (The Quilters) Ltd	Wilsonart
DAS Business Furniture	Lyndon Design	Witley Jones Furniture
Davison Highley Ltd	Magnet ( Nobia)	Worldstores
Debenhams	Ministry of Furniture	Zoe McKune Upholstery
Designer Contracts	Morgan	
DFS	Mountrose Ltd	
EFG Office Furniture Ltd.	Nasons of Canterbury Ltd	

# Project steering group

[▲ Back to contents page](#)

**Appendix 3**

Special thanks are extended to the following individuals and organisations who contributed with their time and expertise in the development of the survey and the content of the final report:

Charles Vernon	Worshipful Company of Furniture Makers
Mick Dingwall	Silentnight
Karl Patterson	Senator
Nick Garratt	Ercol
Harvey Ellis	DFS
Andy Challis	Proskills
Paul von der Heyde	British Furniture Confederation
Tony Smart	Worshipful Company of Furniture Makers
Peter Beele	Furniture Industry Research Association
Damilola Bamidele	Worshipful Company of Furniture Makers

▲ [Back to contents page](#)



# FIRA

Part of the Exova Group

T +44 (0)1438 777 700

F +44 (0)1438 777 800

E [info@fira.co.uk](mailto:info@fira.co.uk)



FIRA International Ltd  
Maxwell Road,  
Stevenage,  
Hertfordshire,  
SG1 2EW