Hort Innovation
Strategic levy investment

NURSERY FUND

This project has been funded by Hort Innovation using the nursery research and development levy and funds from the Australian Government. For more information on the fund and strategic levy investment visit horticulture.com.au

PROJECT ROOTS
POST-CAMPAIGN REPORT

HORT INNOVATION › MAY 2023

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Part of Accenture Song

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S E C T I O N 1

INTRODUCTION

INTRODUCTION TO THE PROJECT

THE OBJECTIVE

Hort Innovation has an objective to increase **domestic customer demand** for Nursery plants through improving knowledge, attitudes, and purchase intent

THE RESEARCH NEED

Understanding consumer usage and attitudes will help Hort Innovation understand how Product **Perceptions connect** to Product **Purchase**

The study will also establish a set of **benchmarks** for future research

ABOUT THE CAMPAIGN

'School of Thumb' is a series of horticultural episodes designed to help Australians take the guesswork out of gardening

Through a series of **long-form** episodes (e.g., 4 to 6 mins), the campaign uses plant experts and a comedic host to equip the public with simple gardening **skills** and **knowledge**, and **inspire** everyday Aussies

RESEARCH AIM AND OBJECTIVES

THE AIM OF THIS PROJECT IS TO DETERMINE THE IMPACT OF NURSERY MARKETING ACTIVITIES IN DRIVING OVERALL GROWTH

1. ESTABLISH CURRENT STATE OF PLAY

- What is “brand health” for the nursery category?
- What are the key attitudes and needs driving nursery behaviour?
- What are the key barriers to plant consideration and purchase?
- How do these issues differ between plant categories?
- What is the level of knowledge in the category?

2. EXAMINE BRAND HEALTH, POST ACTIVITY

- How have key metrics, e.g. brand health, attitudes, changed over time?
- Which customer cohorts are driving that key growth?
- Which barriers are we starting to overcome in the category?
- What marketing tactics and initiatives might drive further growth in the future?

PART 2 OF OUR DUAL PRONGED APPROACH. WE FOLLOWED UP THE 2022 BENCHMARK TO EXAMINE THE EFFECTIVENESS OF THE CAMPAIGN IN SHIFTING ATTITUDES & BEHAVIOURS

RESEARCH METHODOLOGY

BENCHMARK PHASE
AUG / SEP 2022

- Sample of n=1,000 Australians, representative of the population by age, gender, and location (state, region)
- All respondents aged 18-75 and key decision makers for purchasing plants
- 15 minute online survey covering a range of attitudes and behaviours relevant to the category

DEEP DIVE PHASE
APR 2023

- Sample of **n=1,000 Australians**, representative of the population by age, gender, and location (state, region)
- All respondents aged 18-75 and **key decision makers** for purchasing plants
- **Core** 15 minute benchmark survey covering a range of attitudes and behaviours relevant to the category
- Plus additional 5 minute component covering **recall** and **impact** of marketing activities (20 minutes total survey duration)

SECTION 2

BENCHMARK SCORECARD

KEY METRICS – POST-CAMPAIGN VS. BENCHMARK

CURRENT STATE OF PLAY

INDOOR PLANTS

	Post-campaign	Benchmark
Penetration	44%	46%
Spend	$53	$48

OUTDOOR POT PLANTS

	Post-campaign	Benchmark
Penetration	45%	45%
Spend	$55	$45

OUTDOOR GROUND PLANTS

	Post-campaign	Benchmark
Penetration	44%	44%
Spend	$66	$60

TOP BARRIERS TO PURCHASE

INDOOR	OUTDOOR	
23%	31%	The cost of plants
13%	16%	I don't have time to nurture plants
19%	16%	They always seem to die
21%	18%	Lack of space

PURCHASE FREQUENCY

Every 6 months or more

	Post-campaign	Benchmark
INDOOR PLANTS	34%	31%
OUTDOOR POT PLANTS	34%	31%
OUTDOOR GROUND PLANTS	34%	33%

ATTITUDES TO PLANTS

	Post-campaign	Benchmark
I think plants beautify my home and / or garden	83%	83%
Plants improve our health and wellbeing	78%	79%
I feel a connection to nature when caring for my plants	61%	61%
I feel confident in choosing plants	52%	51%

BENCHMARK SURVEY '22

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SECTION 3

CATEGORY PURCHASE BEHAVIOUR

AWARENESS OF NURSERY PLANTS IS LARGELY STABLE; OUTDOOR VARIETIES CONTINUE TO BE BETTER KNOWN VS. INDOOR VARIETIES

PROMPTED NURSERY PLANT AWARENESS

Total sample

Indoor

		BENCHMARK SURVEY '22	% PTS DIFF
Succulents and cacti	67%	68%	-1
Ferns	60%	63%	-3
Hanging baskets	58%	60%	-2
Terrariums	55%	55%	-
Flowering plants	54%	51%	+3
Palms	50%	53%	+3
Low maintenance / low light	47%	49%	-2
Climbers	40%	44%	-4
Bulbs	39%	39%	-
Air purifying plants	34%	35%	-1
Indoor trees	34%	34%	-
Edible plants	34%	35%	-1
Colourful foliage	33%	31%	+2
Trailing plants	32%	33%	-1
Large stem plants	21%	22%	-1

Outdoor

		BENCHMARK SURVEY '22	% PTS DIFF
Roses	82%	83%	-1
Cactus	78%	77%	+1
Orchids	76%	78%	-2
Trees	76%	76%	-
Ferns	73%	76%	-3
Succulents	72%	76%	-4
Palms	71%	71%	-
Hanging plants	71%	71%	-
Bonsai	70%	73%	-3
Natives	70%	71%	-1
Shrubs	69%	70%	-1
Flowering	67%	65%	+2
Hedges	67%	68%	-1
Climbers	66%	66%	-
Azaleas	61%	65%	-4
Bulbs	61%	62%	-1
Seeds	61% ▼	66%	-5
Camelias	59%	61%	-2
Grasses / rushes	57%	59%	-2
Edible plants	55%	57%	-2
Evergreens	52%	55%	-3
Annuals	49%	51%	-2
Perennials	49%	53%	-4
Tropicals	46%	48%	-2
Bloomers	29% ▼	33%	-4

▲ ▼ Significantly higher / lower than benchmark

A1 Which of the following nursery plants have you heard of?
Base: (Total sample) Benchmark 2022 n=1,000, Post-test 2023 n=1,077

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PURCHASE BEHAVIOUR IS ALSO STEADY, WITH REMARKABLY SIMILAR PENETRATION ACROSS THE THREE MAIN TYPES OF PLANTS

TOP PLANT TYPES PURCHASED LAST 12 MONTHS

Total sample

	Indoor	Outdoor pot	Outdoor ground
	44%	**45%**	**44%**
BENCHMARK SURVEY '22	46%	45%	44%

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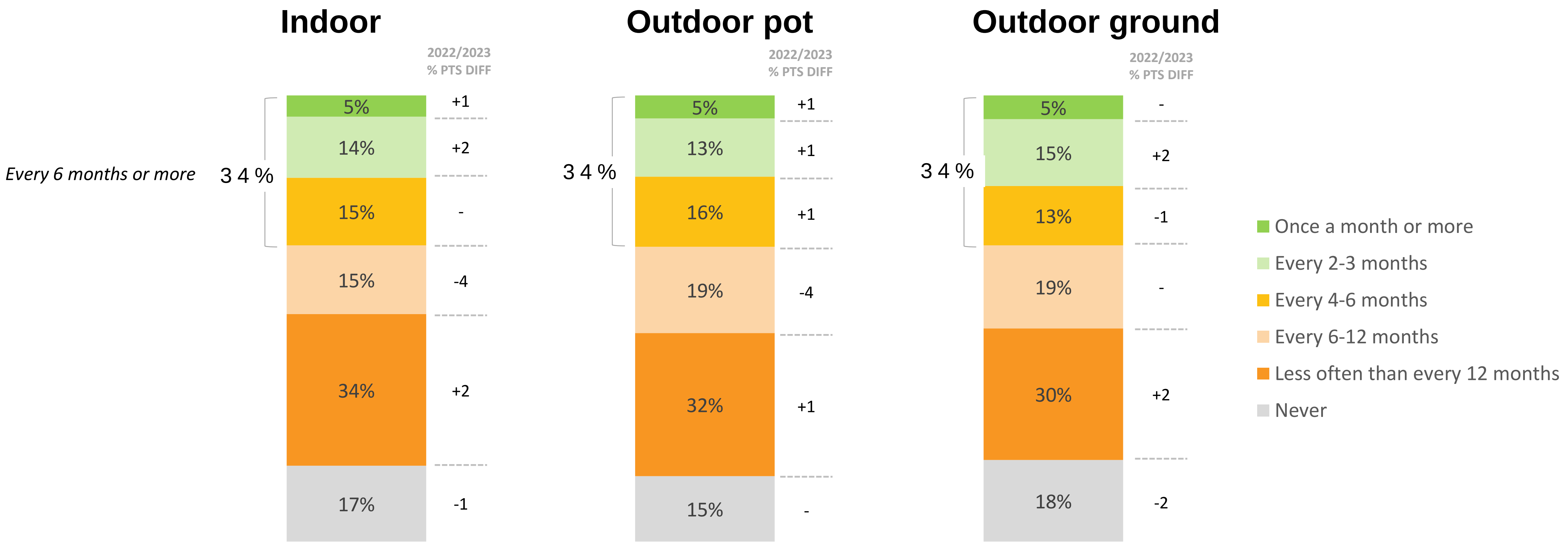
S7 Which of the following types of nursery plants have you purchased in the past 12 months?
Base: (Total sample) Benchmark 2022 n=1,000, Post-test 2023 n=1,077

FREQUENCY IS STABLE AND CONSISTENT BETWEEN INDOOR AND OUTDOOR; 1 IN 2 BUY A PLANT AT LEAST TWICE A YEAR (ANY TYPE)

FREQUENCY OF PURCHASE

Total sample



A2 On average how often do you typically buy nursery plants?
Base: (Total sample) Benchmark 2022 n=1,000, Post-test 2023 n=1,077

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LIFESTAGE & LIVING SITUATION IMPACT THE TYPES OF PLANTS PURCHASED BUT INCOME IS NOT A FACTOR. PLANTS ARE ACCESSIBLE TO THOSE WHO WANT THEM IN THEIR HOMES

PROFILES OF THOSE WHO PURCHASE EVERY 6 MONTHS OR MORE

MORE POPULAR WITH...

Indoor

- **Young** SINKs & DINKs
- Those aged 18 to 34 and therefore those employed
- **Apartment** dwellers and those who have a **patio** / **balcony** instead of a yard

Outdoor pot

- A greater **range** of age groups – both younger (18-34) and older (55+)
- **Apartment** dwellers and those with a **patio** / **balcony** instead of a yard (but not as popular as indoor plants)

Outdoor ground

- Empty nesters and **older** age groups (55+), and therefore those who have retired
- Those living in SA
- Those in a freestanding / detached home, and those with both a **front** and **back yard**
- Those living on rural acreage (although still rare overall)

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A2 On average how often do you typically buy nursery plants?
Base: (Total sample) Benchmark 2022 n=1,000, Post-test 2023 n=1,077

THE TYPES OF PLANTS FAVOURED BY CONSUMERS HAVE SHIFTED FOR BOTH INDOOR AND OUTDOOR VARIETALS; SEASONAL VARIATIONS MAY BE AT PLAY HERE

PLANT VARIETALS PURCHASED (EVERY 6 MONTHS OR MORE)

Total sample

Indoor

Plant type	2023	BENCHMARK SURVEY '22	% PTS DIFF
Low maintenance / low light	29%▲	22%	+7
Edible plants	27%	21%	+6
Flowering plants	22%	20%	+2
Air purifying plants	22%	16%	+6
Succulents and cacti	22%	18%	+4
Colourful foliage	20%	15%	+5
Large stem plants	17%	15%	+2
Trailing plants	15%▲	7%	+8
Climbers	14%	11%	+3
Hanging baskets	13%	10%	+3
Bulbs	12%	13%	+1
Ferns	12%	11%	+1
Palms	11%▲	7%	+4
Terrariums	11%▲	7%	+4
Indoor trees	11%	11%	-

Outdoor

Plant type	2023	BENCHMARK SURVEY '22	% PTS DIFF
Edible plants	36%▲	30%	+6
Flowering	33%	29%	+4
Seeds	25%	28%	-3
Bloomers	23%	20%	+3
Succulents	21%	19%	+2
Annuals	19%	16%	+3
Natives	18%▲	14%	+4
Perennials	18%	15%	+3
Hanging plants	13%	14%	-1
Shrubs	13%	11%	+2
Cactus	12%	9%	+3
Roses	12%▲	8%	+4
Orchids	11%	9%	+2
Evergreens	11%	9%	+2
Bulbs	10%	10%	-
Tropicals	10%	8%	+2
Climbers	10%	8%	+2
Grasses / rushes	10%	7%	+3
Ferns	9%	8%	+1
Trees	9%	6%	+3
Azaleas	8%	8%	-
Camelias	8%	6%	+2
Palms	8%	6%	+2
Hedges	6%	4%	+2
Bonsai	5%	6%	-1

▲▼ Significantly higher / lower than benchmark

A3 How often would you typically purchase each of these plant varietals?
Base: (Total sample) Benchmark 2022 n=1,000, Post-test 2023 n=1,077

SPEND ON OUTDOOR POT PLANTS HAS SIGNIFICANTLY INCREASED, NOW OUTPACES INDOOR PLANTS; HOWEVER OUTDOOR GROUND PLANTS STILL LEAD ON AVERAGE SPEND

AVERAGE SPEND ON PLANTS IN LAST 3 MONTHS

Those who have purchased in the last 3 months

Indoor

$53 | $48

Outdoor pot

$55▲ | $45

Outdoor ground

$66 | $60

BENCHMARK SURVEY '22

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A4 How much have you spent on plants in the last 3 months?
Base: (Purchased last three months) Benchmark 2022 n=650, Post-test 2023 n=723

▲▼ Significantly higher / lower than benchmark

FLOWERING PLANTS ARE MOST LIKELY TO BE PURCHASED FOR OUTDOOR – BUT HAVE DECLINED IN POPULARITY FOR INDOOR, IN FAVOUR OF LOW MAINTENANCE PLANTS

PLANT VARIETALS LIKELY TO BE PURCHASED IN THE FUTURE

Total sample (% very or somewhat likely to buy)

Indoor

		BENCHMARK SURVEY '22	% PTS DIFF
Low maintenance / low light	83%	80%	+3
Flowering plants	74%▼	81%	-7
Colourful foliage	74%	78%	-4
Edible plants	71%	72%	-1
Air purifying plants	70%	75%	-5
Succulents and cacti	54%	56%	-2
Hanging baskets	47%	47%	-
Trailing plants	46%	42%	+4
Climbers	41%	43%	-2
Bulbs	39%▼	49%	-10
Large stem plants	39%	45%	-6
Ferns	39%	41%	-2
Palms	35%	34%	+1
Indoor trees	33%	33%	-
Terrariums	30%	28%	+2

Outdoor

		BENCHMARK SURVEY '22	% PTS DIFF
Flowering	73%▼	80%	-7
Edible plants	68%	68%	-
Natives	60%▼	66%	-6
Succulents	56%	58%	-2
Seeds	52%	57%	-5
Bloomers	52%	59%	-7
Perennials	52%▼	58%	-6
Evergreens	51%	51%	-
Annuals	48%▼	55%	-7
Hanging plants	45%	44%	+1
Shrubs	44%	44%	-
Roses	42%	42%	-
Cactus	41%	38%	+3
Camelias	39%	39%	-
Bulbs	39%	43%	-4
Azaleas	38%	37%	+1
Orchids	37%	39%	-2
Climbers	36%	35%	+1
Tropicals	36%	35%	+1
Grasses / rushes	32%	32%	-
Ferns	32%	35%	-3
Palms	30%	29%	+1
Trees	30%	33%	-3
Hedges	25%	27%	-2
Bonsai	24%	25%	-1

▲▼ Significantly higher / lower than benchmark

E1a/b How likely would you be to purchase these varieties in the future?
Base: (Total sample) Benchmark 2022 n=1,000, Post-test 2023 n=1,077

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STATED PURCHASE BEHAVIOUR HAS SHIFTED & NOW INDICATES CATEGORY DECLINE; INDICATIVELY, THE COST OF PLANTS HAS CONTRIBUTED TO THIS BEHAVIOUR SHIFT

CHANGE IN PURCHASE BEHAVIOUR IN PAST 2 YEARS

Total sample

	Post-test 2023	BENCHMARK SURVEY '22
MORE	21%	22%
SAME	54% ▼	59%
LESS	25% ▲	19%

REASONS FOR BUYING **MORE**

		BENCHMARK SURVEY '22	% PTS DIFF
Staying at home more than I used to	36%	39%	-3
It helps me feel relaxed in uncertain times	31%	32%	-1
Landscaped / re-landscaped the garden or part of the garden	31%	27%	+4
I picked up gardening as a hobby	30% ▲	20%	+10
Moved house within the last two years	27%	30%	-3
Life change allowed me to spend more time gardening	15%	16%	-1
I was given a plant as a gift and it got me more into it	14%	17%	-3
Have more discretionary income to spend on non-essentials	12%	16%	-4
Other	6%	4%	+2

REASONS FOR BUYING **LESS**

		BENCHMARK SURVEY '22	% PTS DIFF
I am happy with my garden, don't require as many plants	46%	45%	+1
I was tired of plants always dying	20%	20%	-
I was spending too much on plants	16%	10%	+6
Life change has not allowed as much time for gardening	16%	14%	+2
I moved to a place that is less appropriate for plants	15%	19%	-4
Not staying at home as much as I used to	13%	12%	+1
I dropped gardening as a hobby	7%	8%	-1
Other	11%	6%	+5

B11 Thinking about the past 2 years, are you buying nursey plants... B12 You said you are buying nursery plants MORE than you used to. Why is this the case? B13 You said you are buying nursery plants LESS than you used to. Why is this the case?
Base: (Total sample) Benchmark 2022 n=1,000, Post-test 2023 n=1,077, Those who purchase more often n=214/227, Those who purchase less often n=194/274

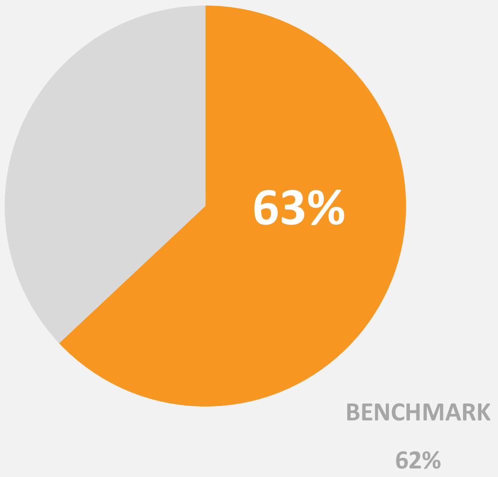
▲ ▼ Significantly higher / lower than benchmark

AS COST OF LIVING PRESSURES RISE, DISCRETIONARY PURCHASES LIKE INDOOR PLANTS ARE IMPACTED; COST HAS BECOME A MUCH STRONGER PURCHASE BARRIER

REASONS FOR NON-PURCHASE IN LAST 3 MONTHS – INDOOR

Non-purchasers

Two in three have not purchased an **indoor** plant in the last 3 months



41% ▲ 22% COST

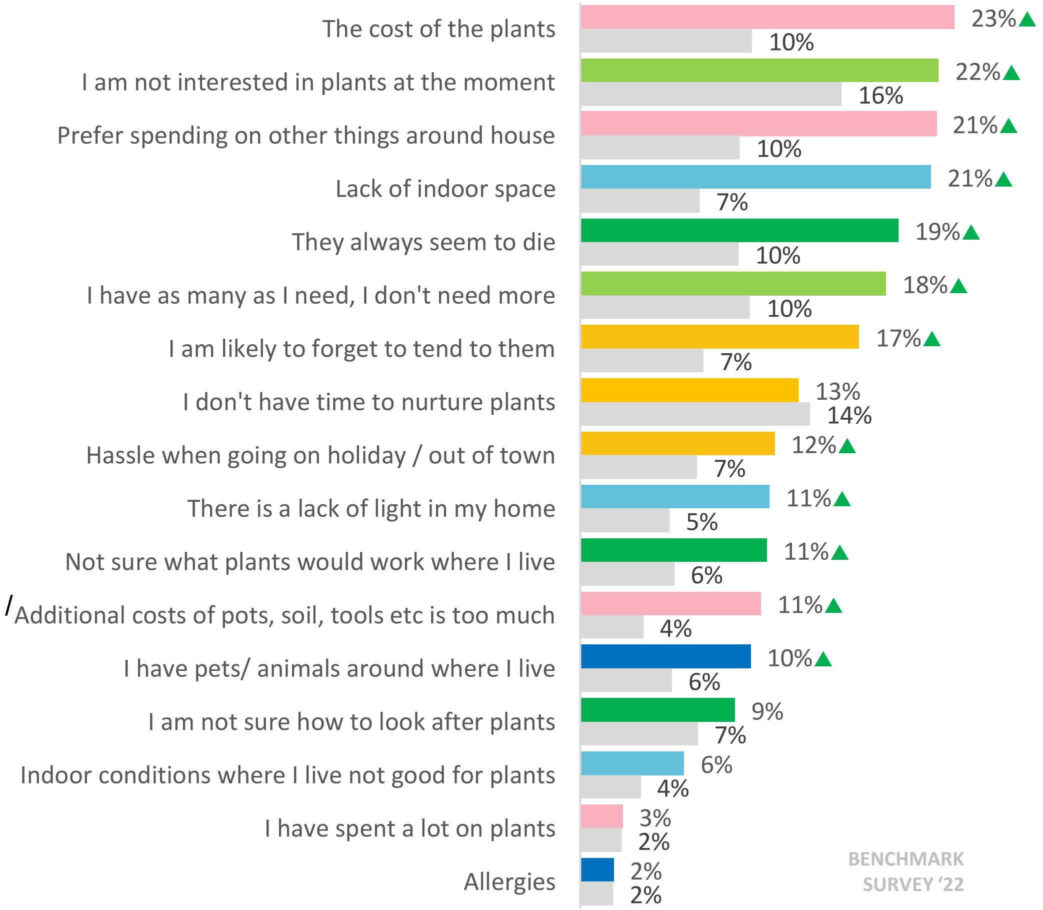
38% ▲ 26% NO INTEREST

31% ▲ 24% TIME AND PRIORITIES

31% ▲ 14% ENVIRONMENTAL CONDITIONS

30% ▲ 18% GARDENING ABILITY / CONFIDENCE

12% ▲ 7% PETS / ANIMALS / ALLERGIES



S9 Which of the following reasons describe why you haven't bought nursery plants in the last 3 months?
Base: (Non purchasers in last three months) Benchmark 2022 n=349, Post-test 2023 n=354

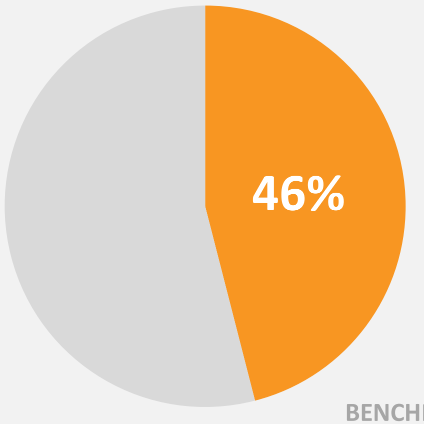
▲▼ Significantly higher / lower than benchmark

ALTHOUGH THE PROPORTION OF NON-OUTDOOR PLANT PURCHASERS IS STABLE VS. BENCHMARK, THE BARRIERS ARE MORE COMPREHENSIVE NOW (PARTICULARLY COST)

REASONS FOR NON-PURCHASE IN LAST 3 MONTHS - OUTDOOR

Non-purchasers

One in two have not purchased an **outdoor** plant in the last 3 months



BENCHMARK

51%

45% ▲ 33% NO INTEREST

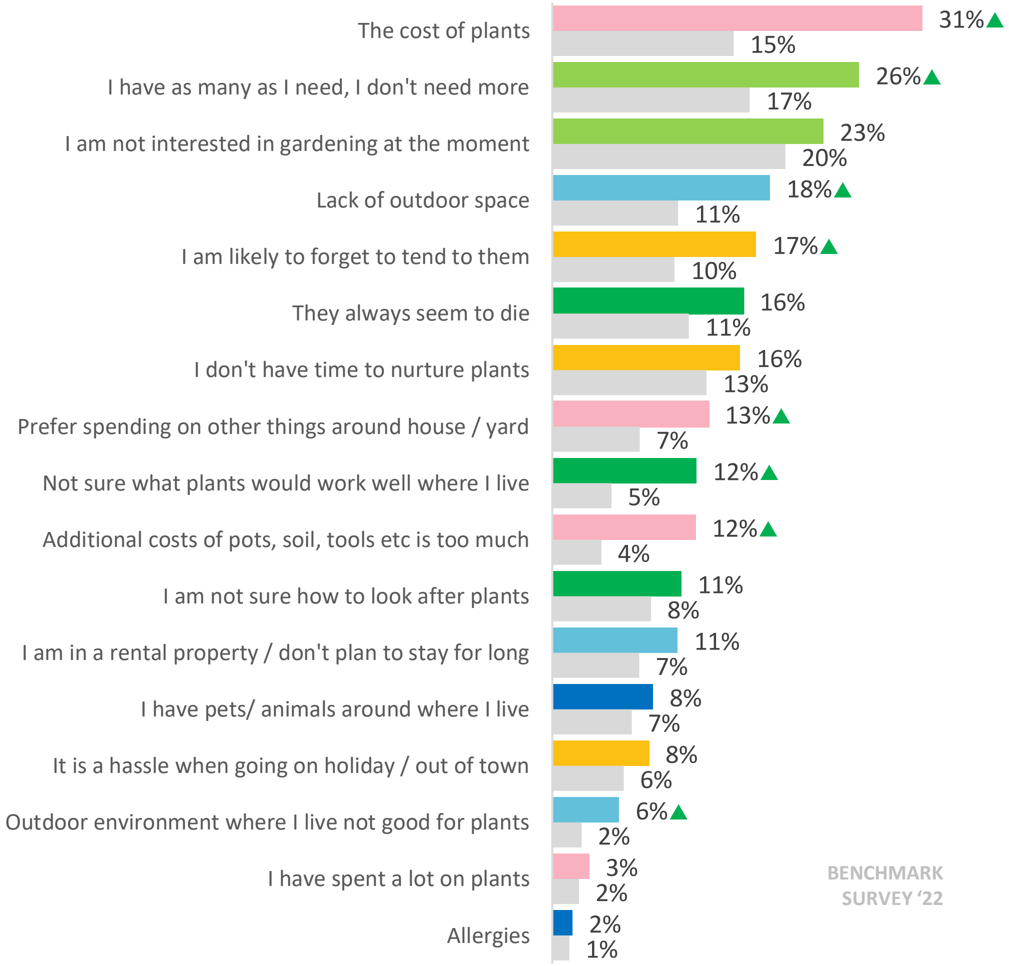
42% ▲ 25% COST

32% ▲ 23% TIME AND PRIORITIES

29% ▲ 18% ENVIRONMENTAL CONDITIONS

24% 19% GARDENING ABILITY / CONFIDENCE

10% 8% PETS / ANIMALS / ALLERGIES



▲▼ Significantly higher / lower than benchmark

S9 Which of the following reasons describe why you haven't bought nursery plants in the last 3 months?
Base: (Non purchasers in last three months) Benchmark 2022 n=349, Post-test 2023 n=354

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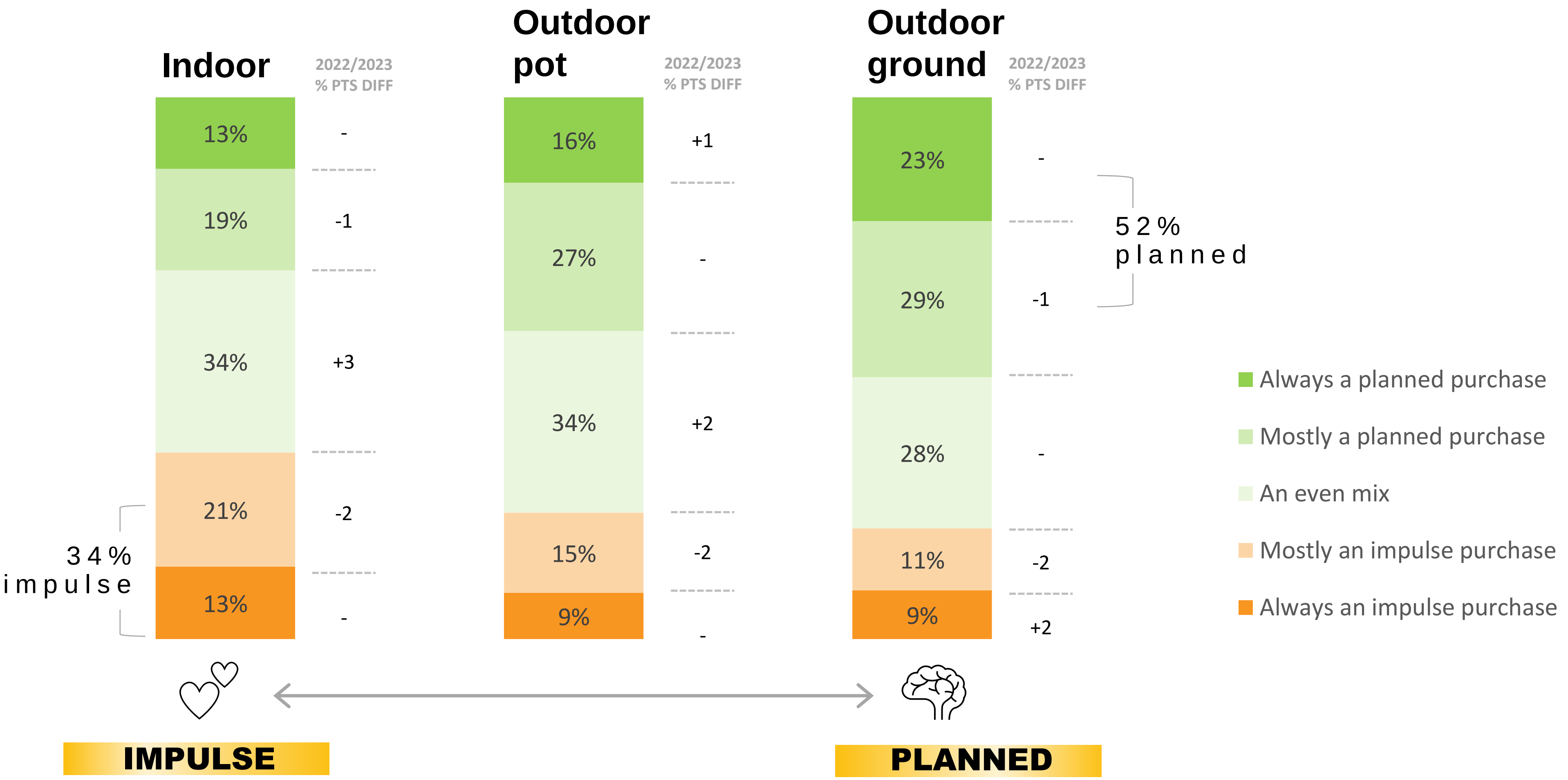
SECTION 4

SNAPSHOT OF PURCHASE JOURNEY

CONSISTENT WITH THE BENCHMARK, INDOOR PLANTS ARE MORE IMPULSE PURCHASES, WHEREAS MORE THOUGHT GOES INTO OUTDOOR GROUND PLANT PURCHASES

PLANNED VS IMPULSE PURCHASE

Those who purchase plants



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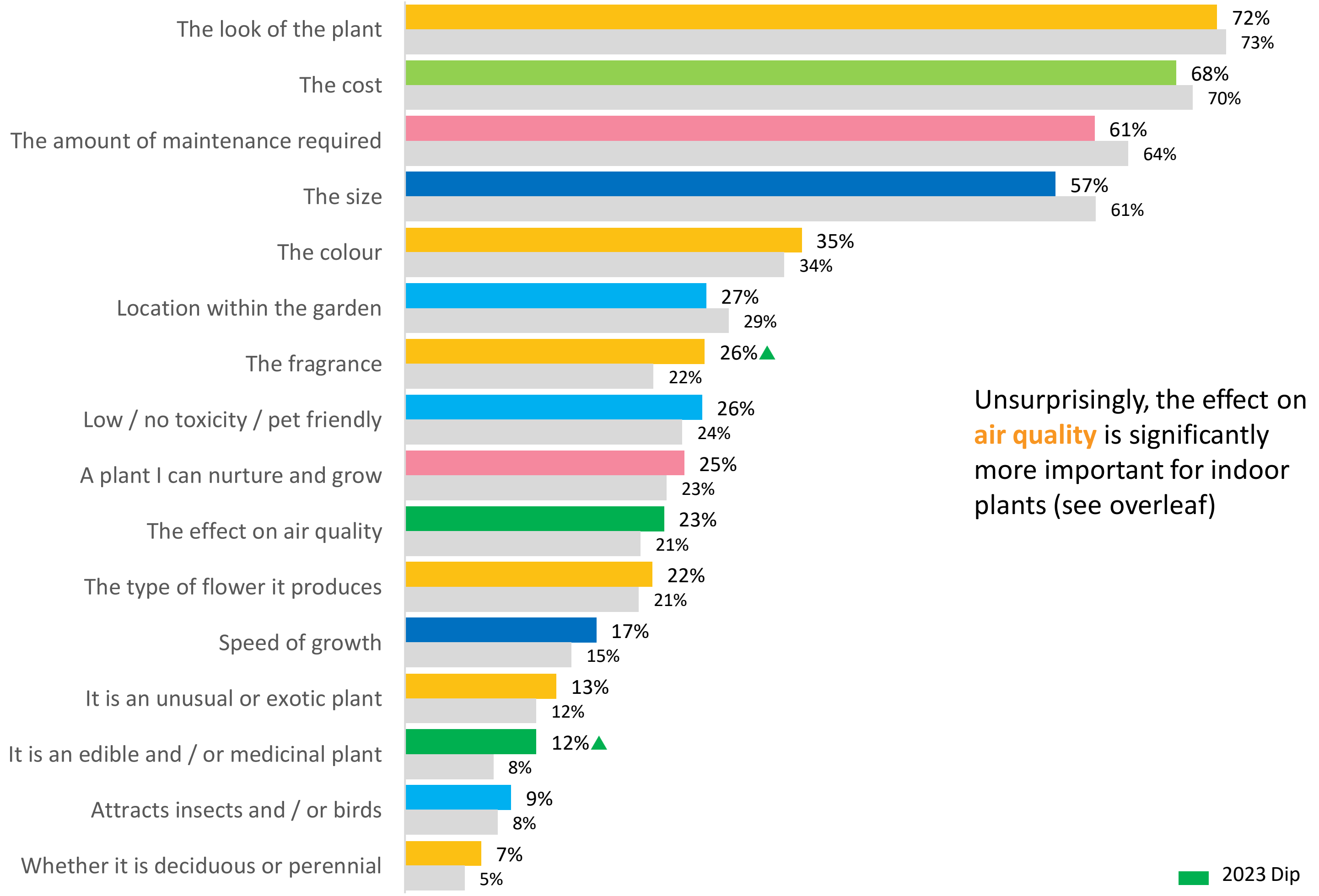
A5 Thinking about the way you shop for nursery plants, how much planning goes into your decision to purchase each of these?
Base: (Purchase plants) Benchmark 2022 n=888, Post-test 2023 n=985

WHILE AESTHETICS ARE THE KEY DRIVER OF PURCHASE, FRAGRANCE & CONSUMPTION BENEFITS ARE BECOMING INCREASINGLY INFLUENTIAL

FACTORS THAT INFLUENCE PURCHASE – INDOOR PLANTS

Total sample

- COST
- AESTHETICS AND FRAGRANCE
- TIME AND CARE NEEDED
- GROWTH FACTORS
- EXTERNAL / ENVIRONMENTAL CONDITIONS
- MEDICINAL OR CONSUMPTION BENEFITS



Unsurprisingly, the effect on **air quality** is significantly more important for indoor plants (see overleaf)

▲▼ Significantly higher / lower than benchmark

B10 Please select up to five (5) important factors that influence whether you purchase outdoor and indoor nursery plants
Base: (Total sample) Benchmark 2022 n=1,000, Post-test 2023 n=1,077

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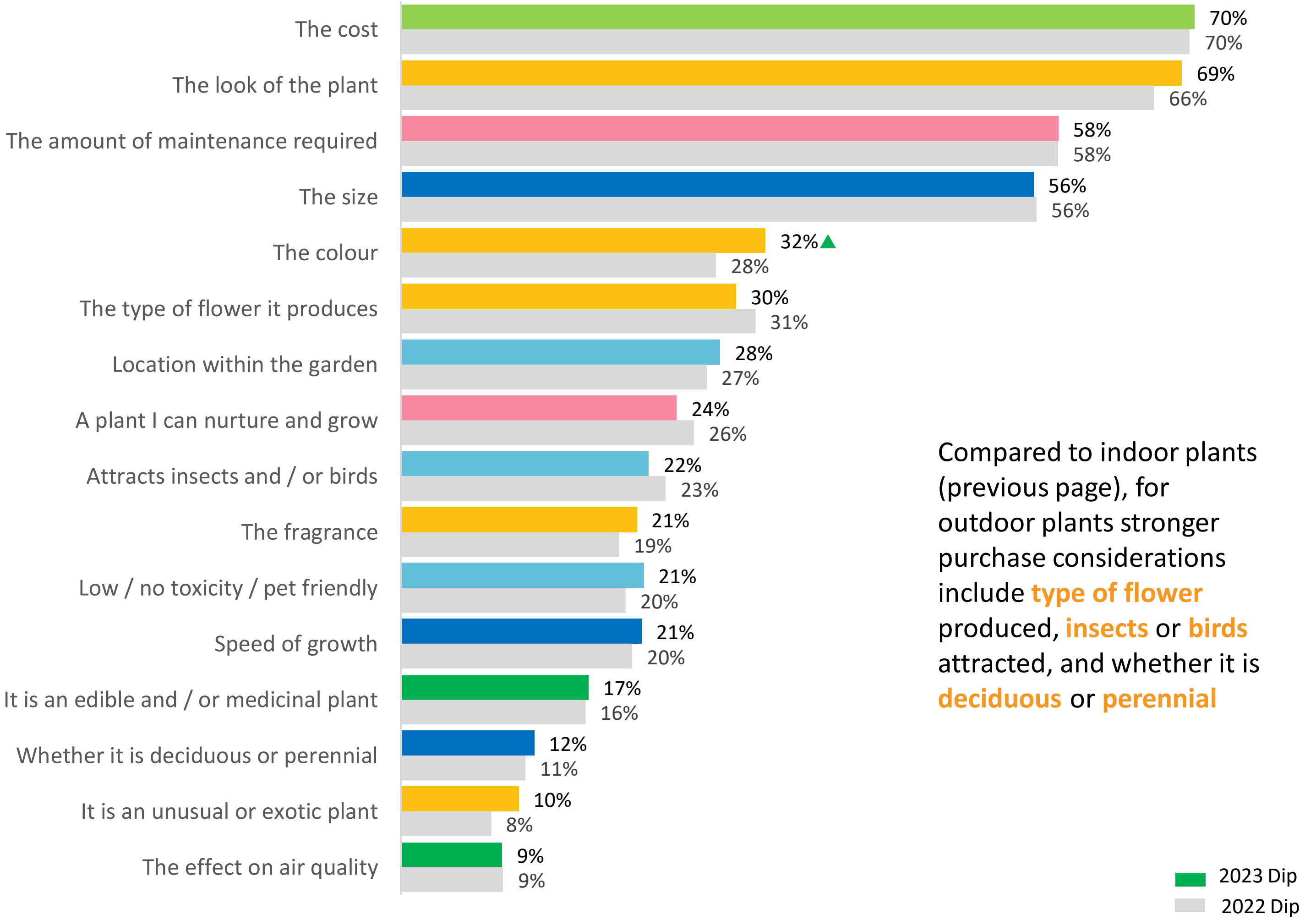
COST & AESTHETICS ARE KEY DRIVERS OF PURCHASE FOR OUTDOOR PLANTS, WITH COLOUR BECOMING AN INCREASINGLY IMPORTANT CONSIDERATION

FACTORS THAT INFLUENCE PURCHASE – OUTDOOR PLANTS

Total sample

- COST
- AESTHETICS AND FRAGRANCE
- TIME AND CARE NEEDED
- GROWTH FACTORS
- EXTERNAL / ENVIRONMENTAL CONDITIONS
- MEDICINAL OR CONSUMPTION BENEFITS



Compared to indoor plants (previous page), for outdoor plants stronger purchase considerations include **type of flower** produced, **insects** or **birds** attracted, and whether it is **deciduous** or **perennial**

▲▼ Significantly higher / lower than benchmark

B10 Please select up to five (5) important factors that influence whether you purchase outdoor and indoor nursery plants
Base: (Total sample) Benchmark 2022 n=1,000, Post-test 2023 n=1,077

INDOOR PLANTS ARE KNOWN FOR THEIR BEAUTY AND VISUAL IMPACT, BUT THE PERCEIVED DIFFICULTY AND TIME REQUIRED TO MAINTAIN THEM IS A KEY DETERRENT

BENEFITS AND ISSUES WITH INDOOR PLANTS

Total sample

INDOOR PLANTS

BENEFITS

Benefit	%	BENCHMARK SURVEY '22	% PTS DIFF
They are attractive	60%	58%	+2
They are a form of décor in a room	54%	56%	-2
They improve air quality	45%	45%	-
They make me happy	40%	40%	-
They bring an element of the outdoors inside	38%	39%	-1
I feel proud when they grow and flourish	26%	26%	-
They have a nice fragrance	24%	22%	+2
They are a relaxing hobby to look after	22%	20%	+2

ISSUES

Issue	%	BENCHMARK SURVEY '22	% PTS DIFF
They are difficult to maintain / keep alive	52%	55%	-3
They take time and effort to maintain	49%	45%	+4
They attract insects inside	34%	32%	+2
They are expensive to replace	32%	31%	+1

B15a Which of the following are BENEFITS of owning INDOOR plants? B16a Which of the following are potential ISSUES associated with INDOOR plants?
Base: (Total sample) Benchmark 2022 n=1,000, Post-test 2023 n=1,077

▲▼ Significantly higher / lower than benchmark

OUTDOOR PLANTS OFFER A RANGE OF FUNCTIONAL (VISUAL APPEAL, ATTRACT NATURE) & EMOTIONAL (PRIDE, ENJOYMENT) BENEFITS; BUT, ARE TIME CONSUMING & HIGH EFFORT

BENEFITS AND ISSUES WITH OUTDOOR PLANTS

Total sample

OUTDOOR PLANTS

BENEFITS

	Post-test 2023	BENCHMARK SURVEY '22	% PTS DIFF
They are attractive	60%	63%	-3
They make an outdoor space more enjoyable to spend time in	55%	54%	+1
I feel proud when they grow and flourish	48%	53%	-5
They attract nature (e.g. insects and birds)	46%▲	42%	+4
You can harvest fruit / vegetables / herbs from them	45%	45%	-
They are a relaxing hobby to look after	33%	33%	-
They have a nice fragrance	29%	27%	+2
They balance the architecture of an outdoor space	28%	28%	-
You can pick flowers to form an indoor bouquet	24%	22%	+2
I like to show my outdoor garden and plants to others	22%	22%	-

ISSUES

	Post-test 2023	BENCHMARK SURVEY '22	% PTS DIFF
They may need to be pruned / cut back often	55%	51%	+4
They take time and effort to maintain	54%	55%	-1
Leaves and debris falling in gutters and / or on the ground	40%	39%	-1
Some look less attractive in winter	32%	35%	-3
The disposal of cut offs and pruning is difficult	24%	22%	+2
They attract too many insects, birds and / or pests	20%	20%	-

B15b Which of the following are BENEFITS of owning OUTDOOR plants? B16B Which of the following are potential ISSUES associated with OUTDOOR plants?
Base: (Total sample) Benchmark 2022 n=1,000, Post-test 2023 n=1,077

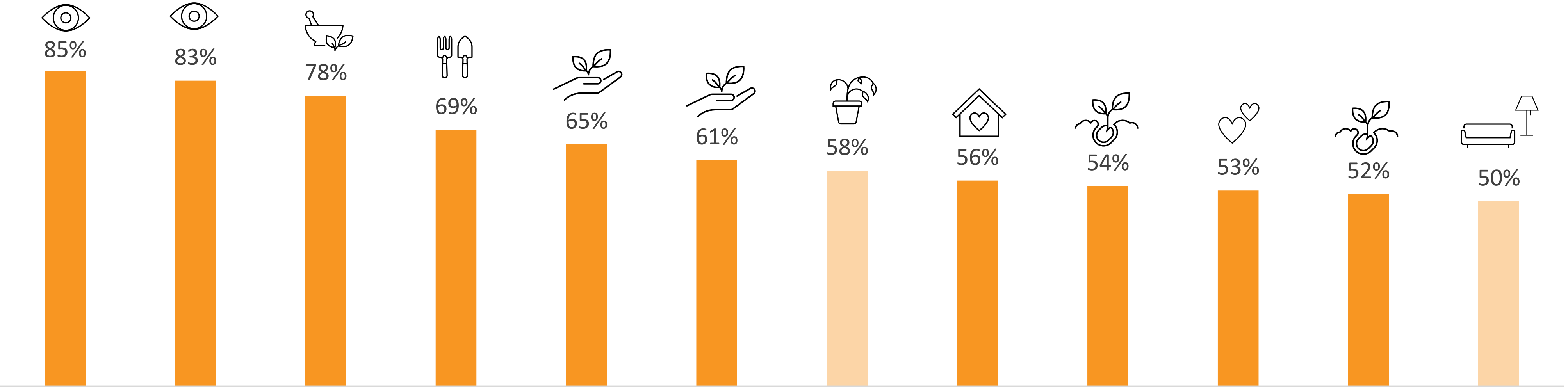
▲▼ Significantly higher / lower than benchmark

PLANTS ARE HELD IN A POSITIVE MINDSET. THERE ARE CLEAR ASSOCIATIONS WITH WELLBEING & CONNECTION TO NATURE, ALONG WITH ACCESSIBILITY

ATTITUDES TOWARD PLANTS

Total sample (% slightly or strongly agree)

Statement	BENCHMARK SURVEY '22	% PTS DIFF	Total sample
Plants are a great way of adding colour and greenery to a space	86%	-1	85%
I think plants beautify my home and / or garden	83%	-	83%
Plants improve our health and wellbeing	79%	-1	78%
You don't need to be a plant specialist to have plants in and around the home	70%	-1	69%
I feel a connection to nature having plants in my home / garden	67%	-2	65%
I feel a connection to nature when caring for my plants	61%	-	61%
I often worry my plants will die	54%	+4	58%
I would love to fill my space / home with more plants if I could	57%	-1	56%
I feel confident in caring for and nurturing my plants	53%	+1	54%
I love caring for plants	56%	-3	53%
I feel confident in choosing plants	51%	+1	52%
Lack of space in and around my home prevents me from buying more plants	48%	+2	50%



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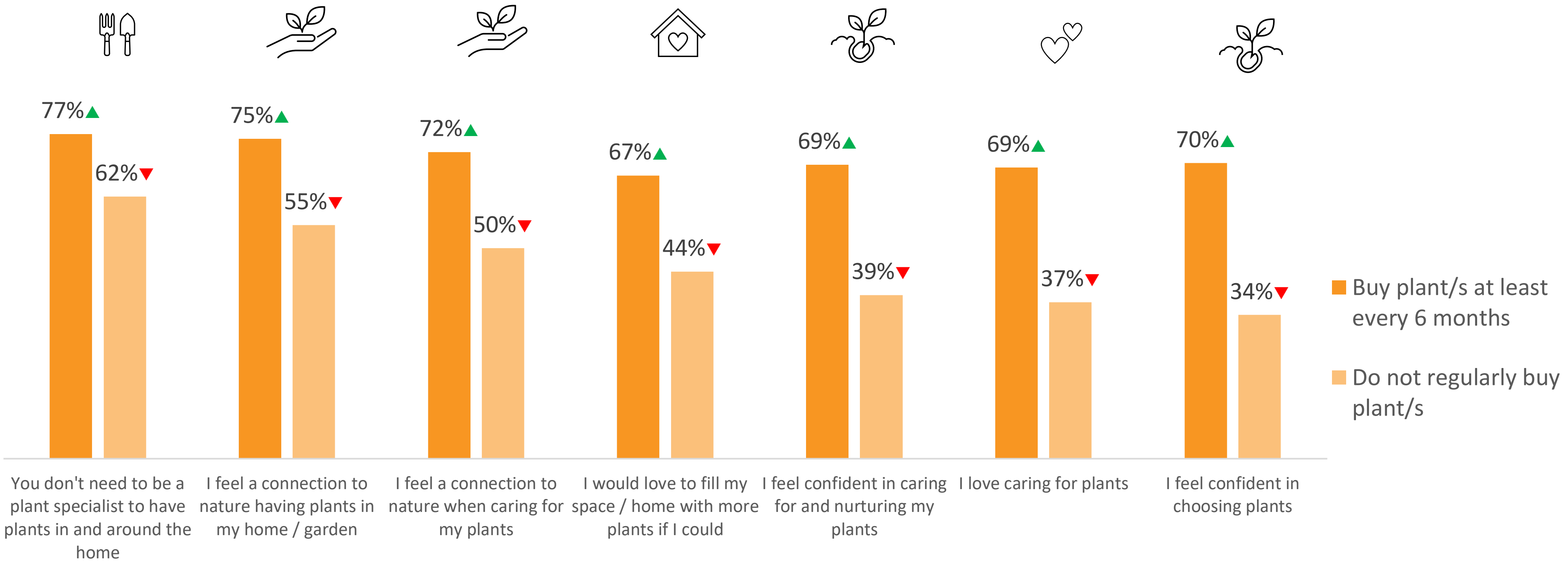
B17 To what extent do you agree or disagree with the following statements?
Base: (Total sample) Benchmark 2022 n=1,000, Post-test 2023 n=1,077

BARRIERS

REGULAR PLANT BUYERS HAVE A GREATER PLANT KNOWLEDGE & CONFIDENCE, REINFORCING THE IMPORTANCE OF EDUCATIONAL TOOLS LIKE 'SCHOOL OF THUMB'

ATTITUDES TOWARD PLANTS

Total sample (% slightly or strongly agree)



B17 To what extent do you agree or disagree with the following statements? A2 Buy any type of plant at least every 6 months.
Base: (Total sample) Benchmark 2022 n=1,000, Post-test 2023 n=1,077

▲▼ Significantly higher / lower than other subgroup

S E C T I O N 5

RECENT PURCHASE OCCASION

PURCHASE TYPE AND LOCATION ARE STABLE; LARGE RETAILERS CONTINUE AS THE MAIN PURCHASE LOCATION, & INDOOR PLANTS ARE THE MOST FREQUENT RECENT PURCHASE

MOST RECENT PURCHASE – PLANT TYPE AND PURCHASE LOCATION

Purchasers only

BENCHMARK SURVEY '22

Indoor plant

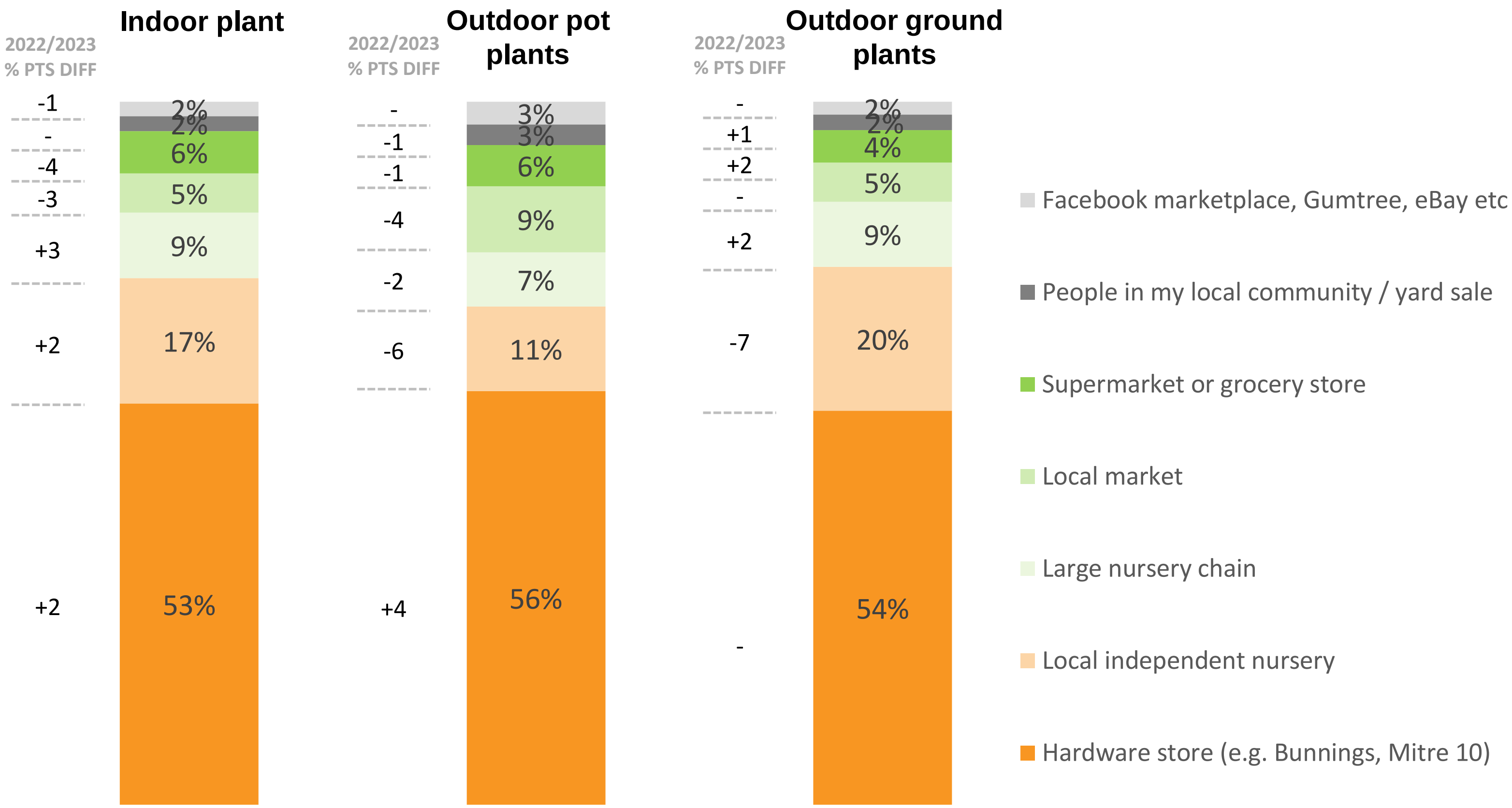
44% 47%

Outdoor pot plants

36% 34%

Outdoor ground plants

34% 31%



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C1 Which type of plant(s) did you buy on your most recent purchase?
Base: Benchmark 2022/ Post-test 2023 Purchasers n=650/723
C2c Where did you purchase these plants from?
Base: Benchmark 2022, Indoor plants/Outdoor in pot/Outdoor in ground n= 300/217/205, Post-test 2023, Indoor plants/Outdoor in pot/Outdoor in ground n= 319/260/244

PURCHASE OF INDOOR PLANTS FOR LIVING AREAS IS UP, BUT OTHER LOCATIONS ARE STAGNANT; GROWTH OPPORTUNITY IN HIGHLIGHTING BENEFITS TO OTHER ROOMS

INTENDED PLANT LOCATION WITHIN THE HOME

Indoor plant purchasers on last occasion

Indoor plants

72% | 66%
Living area

20% | 22%
Kitchen

14% | 17%
Bedroom

14% | 12%
Bathroom

9% | 7%
Study / workspace

5% | 5%
Other

BENCHMARK SURVEY '22

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C3a - Where do you intend to keep the plant that you bought? INDOOR
Base: Indoor plant purchasers on last occasion 2022/2023 n=300/319

OUTDOOR PLANT PURCHASES CONTINUE TO BE FOCUSED ON BACKYARD IMPROVEMENT; HIGHLIGHTING BENEFITS FOR BALCONIES MAY ENCOURAGE GREATER EXPERIMENTATION

INTENDED PLANT LOCATION WITHIN THE HOME

Outdoor plant purchasers on last occasion

Outdoor pot plants

	Back yard	Front yard	Balcony	Side yard	Other
	60%	25%	16%	16%	3%
	54%	26%	20%	13%	3%

Outdoor ground plants

	Back yard	Front yard	Side yard	Other
	59%	44%	13%	2%
	62%	43%	11%	1%

BENCHMARK SURVEY '22

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C3b/c - Where do you intend to keep the plant that you bought? OUTDOOR POT / OUTDOOR IN THE GROUND
Base: Outdoor pot plant purchasers on last occasion 2022/2023 n=217/260, Outdoor in ground plant purchasers 2022/2023 n= 205/244

INDOOR PLANTS HAVE A BROADER RANGE OF USES; OUTDOOR GROUND PLANTS ARE MORE SINGULARLY INTENDED FOR GARDENS, BUT LAWNS ARE BECOMING MORE POPULAR

SPECIFIC INTENDED PLANT LOCATION

Plant purchasers on last occasion

Indoor plant

Location	2023	BENCHMARK SURVEY '22	% PTS DIFF
Standalone plant stand	32%	26%	+6
Windowsill	30%	27%	+3
Side table	29%	29%	-
Bookshelf	20%	17%	+3
Desk	16%	16%	-
Dining table	9%	12%	-3
Other	7%	6%	+1

Outdoor pot plants

Location	2023	BENCHMARK SURVEY '22	% PTS DIFF
On a patio area or balcony	52%	50%	+2
In an already existing garden	36%	36%	-
Near the door to the house	22%	20%	+2
On the lawn	6%	14%	+8
Other	3%	3%	-

Outdoor ground plants

Location	2023	BENCHMARK SURVEY '22	% PTS DIFF
In an already existing garden	64%▼	74%	-10
Near a fence	33%	32%	+1
Near the door to the house	12%	7%	+5
On the lawn	11%▲	2%	+9
Other	5%	3%	+2

C4a/b/c - Where specifically do you plan to place them?
Base: Indoor plant purchasers 2022/2023 n=300/319, Outdoor pot plant purchasers on last occasion 2022/2023 n=217/260, Outdoor in ground plant purchasers 2022/2023 n= 205/244

▲▼ Significantly higher / lower than benchmark

SECTION 9

KEY TAKE OUTS

3 KEY FINDINGS

KEY TAKEOUT 1

PURCHASE BEHAVIOUR HAS BEEN FLAT, BUT DECLINE MAY BE IMMINENT

Stated purchase behaviour has shifted and now indicates category decline, with buyers saying they are purchasing plants less often.

The post-Covid upswing has corrected, indicatively due to cost of living pressures and reduced discretionary spend.

KEY TAKEOUT 2

THE PROPORTION OF NON-BUYERS IS FLAT, BUT BARRIERS ARE STRONGER

Although the same proportion of people are not buying plants now (vs. benchmark), they express a much greater and broader set of barriers.

There are more reasons not to buy plants, highlighting that shifting the behaviour of this audience is getting even harder.

KEY TAKEOUT 3

RELATIONSHIP BETWEEN KNOWLEDGE & PURCHASE IS CLEAR

There is a clear relationship between confidence in maintaining plants and purchase behaviour.

This reinforces the need for building consumer knowledge and confidence in how to look after plants.

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