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Purchasing Barriers Tracking Study Executive Summary

This study was a 21-minute Internet survey, conducted from June 13 – 24, 2013 among 1509 eligible respondents drawn from Internet panel sources. Sample was drawn to be nationally representative of the US population. These respondents are reasonably representative of the non-flower purchasing population. Eligible respondents:

- Were U.S. residents aged 18 to 60
- Had a total annual household income of at least $15,000
- Have NOT purchased cut flowers in past 12 months

Non-flower purchasers are **not averse** to buying flowers – however, they **need help removing barriers** to purchase, namely price, concerns about longevity of cut flowers, and lack of education regarding appropriateness and meaning of flowers. In fact, almost all of these non-flower purchasers *have* given flowers in the past, just not in the past 12 months, suggesting they just need the motivation to purchase flowers again. The three most effective ways to encourage flower purchase among those who have not purchased recently are: **price / value, longevity / vase life, and education**.

Price / Value: These consumers are very price-sensitive in general, and have a perception that flowers are expensive. Providing things such as lower prices, coupons, Internet codes, discounts and other price-cutting measures is **very appealing** to these non-flower purchasers – more than half of these respondents said these measures would make them definitely or probably consider a flower purchase.

Marketing efforts should be directed to reinforce how much recipients enjoy receiving flowers on many different occasions, not just major holidays and the "established" flower-giving holidays such as Mother's Day. Different price-levels and tiers for flowers may also help attract these consumers as well. These consumers are spending an average of $35 for each gift they give, so offering "entry-level" flower bouquets in that price range may help increase the likelihood of them choosing to buy flowers in the future.

Longevity / Vase life: Also of primary concern to these consumers is the **vase life** of cut flowers. Part of the value proposition of flowers is that they are a perishable item – consumers need to be reminded of just how long flowers will last when properly cared for, to set their expectations up front. Demonstrating how long flowers last if properly taken care of and educating consumers on how to properly care for cut flowers to **ensure maximum longevity** will go a long way towards changing perceptions that flowers don't last long enough. **Guarantees of vase life** for cut flowers will also encourage consumers to purchase flowers, as that is a major concern and cited as a top reason for not purchasing flowers.

Education: About a quarter of these consumers don't understand the **significance of various types and colors** of cut flowers – education on this front may also help to encourage them to choose flowers. Knowing **which flowers** to give on **which occasions** and **to which people** would help keep flowers top-of-mind in the consideration set when it's time to give gifts that are not for major holidays, such as birthdays (the most frequent gift-giving occasion), romantic occasions, "just because" and as a token of appreciation or thank you, when other gifts are currently being bought. Additionally, if ordering online, consumers would benefit from access to live customer service to help pick the right flowers for the occasion they're looking to purchase for. This would help consumers overcome the feelings of being overwhelmed with the amount of choices for flower types and colors. Consumers also would benefit from reminders of the appropriateness of flowers for a wide array of gift-giving occasions, not just the major flower-giving holidays.