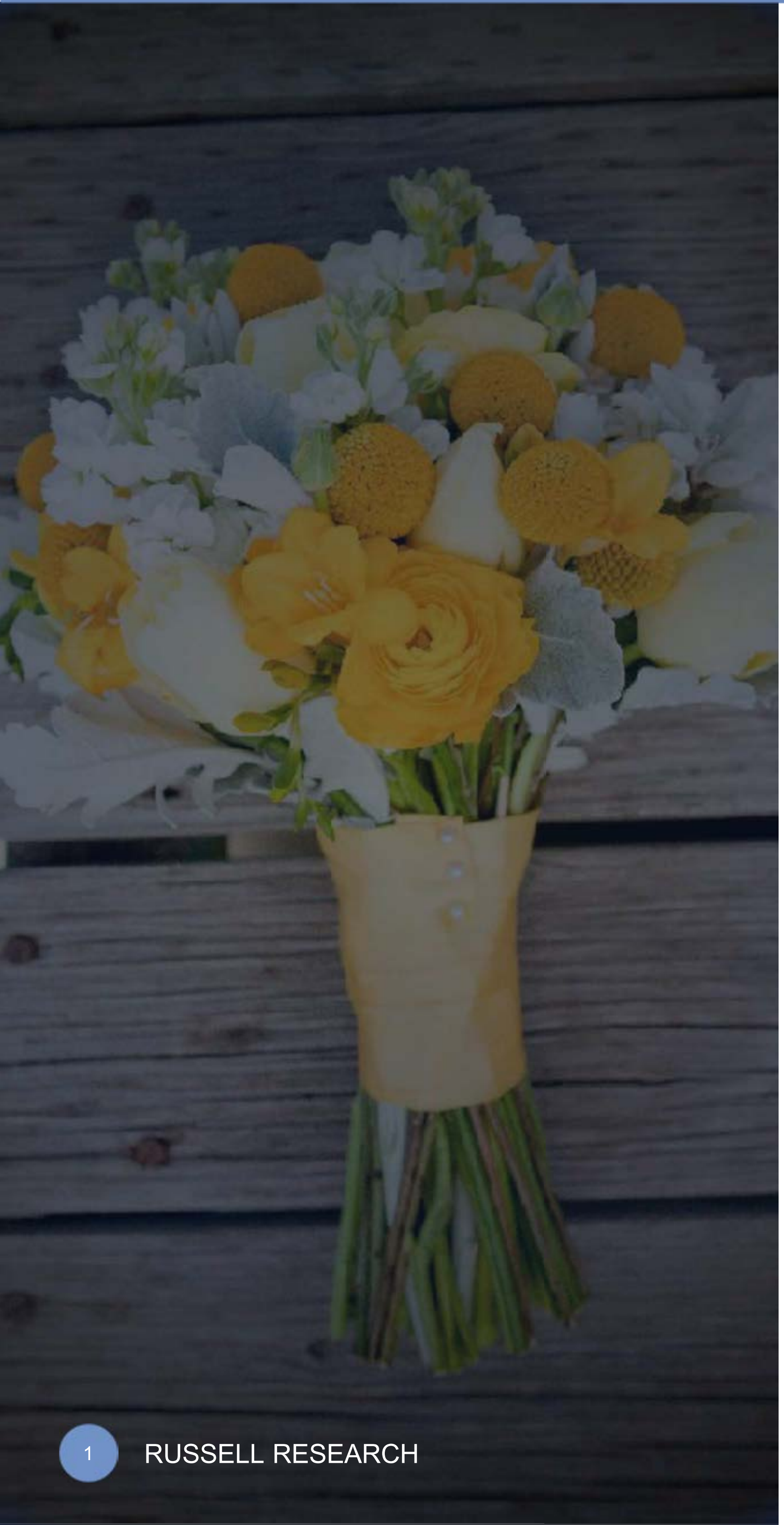
February 2016

Russell RESEARCH

2016 GENERATIONS OF FLOWERS STUDY

FINAL REPORT

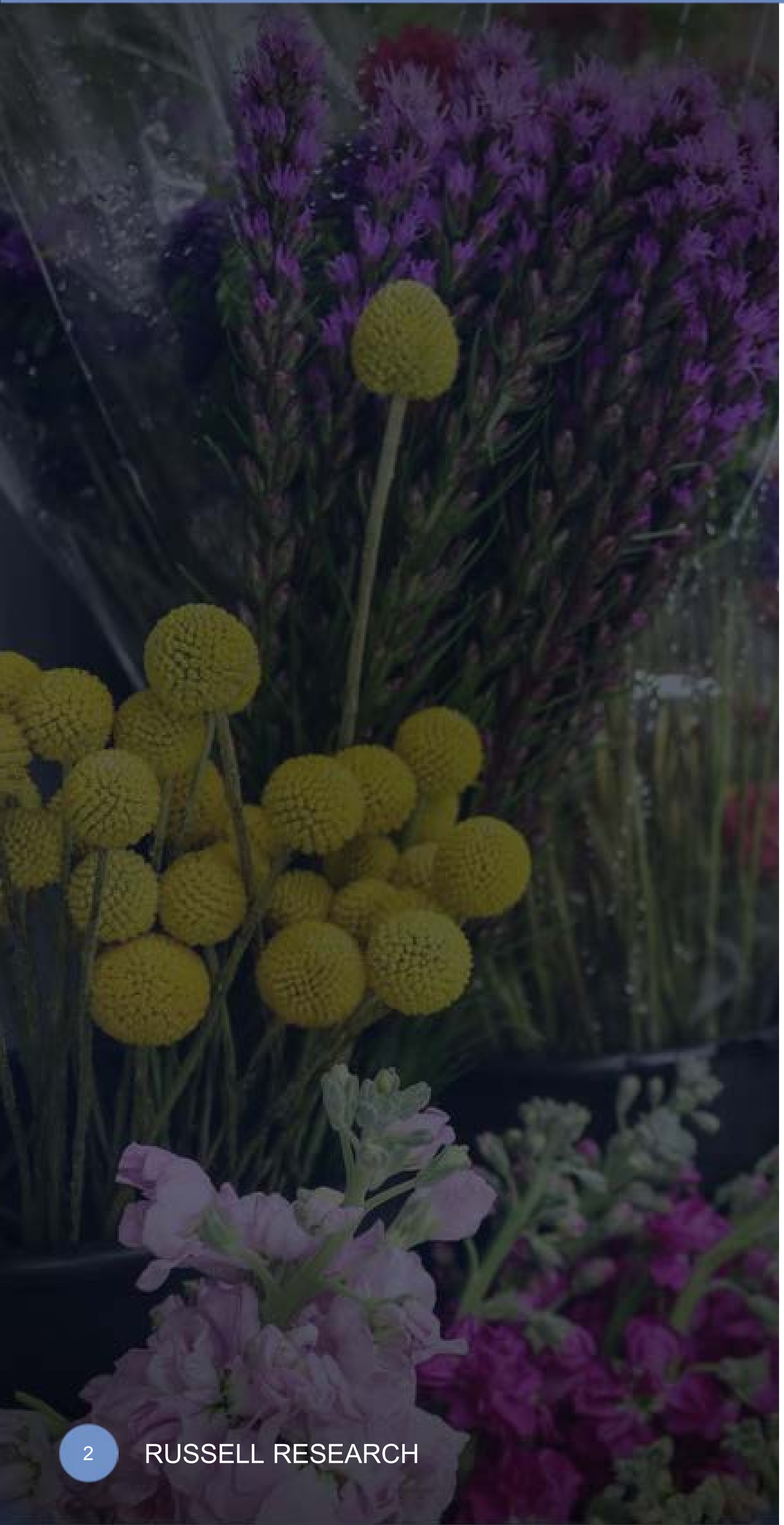


INTRODUCTION

The Society of American Florists (SAF) commissioned a research study in 2009 which evaluated perceptions and purchasing/gift-giving behavior regarding flowers and plants among three key generations: Generation Y, Generation X, and Baby Boomers.

SAF and the American Floral Endowment (AFE) worked in partnership to update the research in January 2016. Funding for the project was provided by the Floral Marketing Research Fund.

SAF – Society of American Florists	American Floral Endowment – Funding Generations of Progress Through Research and Scholarships	Floral Marketing Research Fund
safnow.org	endowment.org	fmrf.org

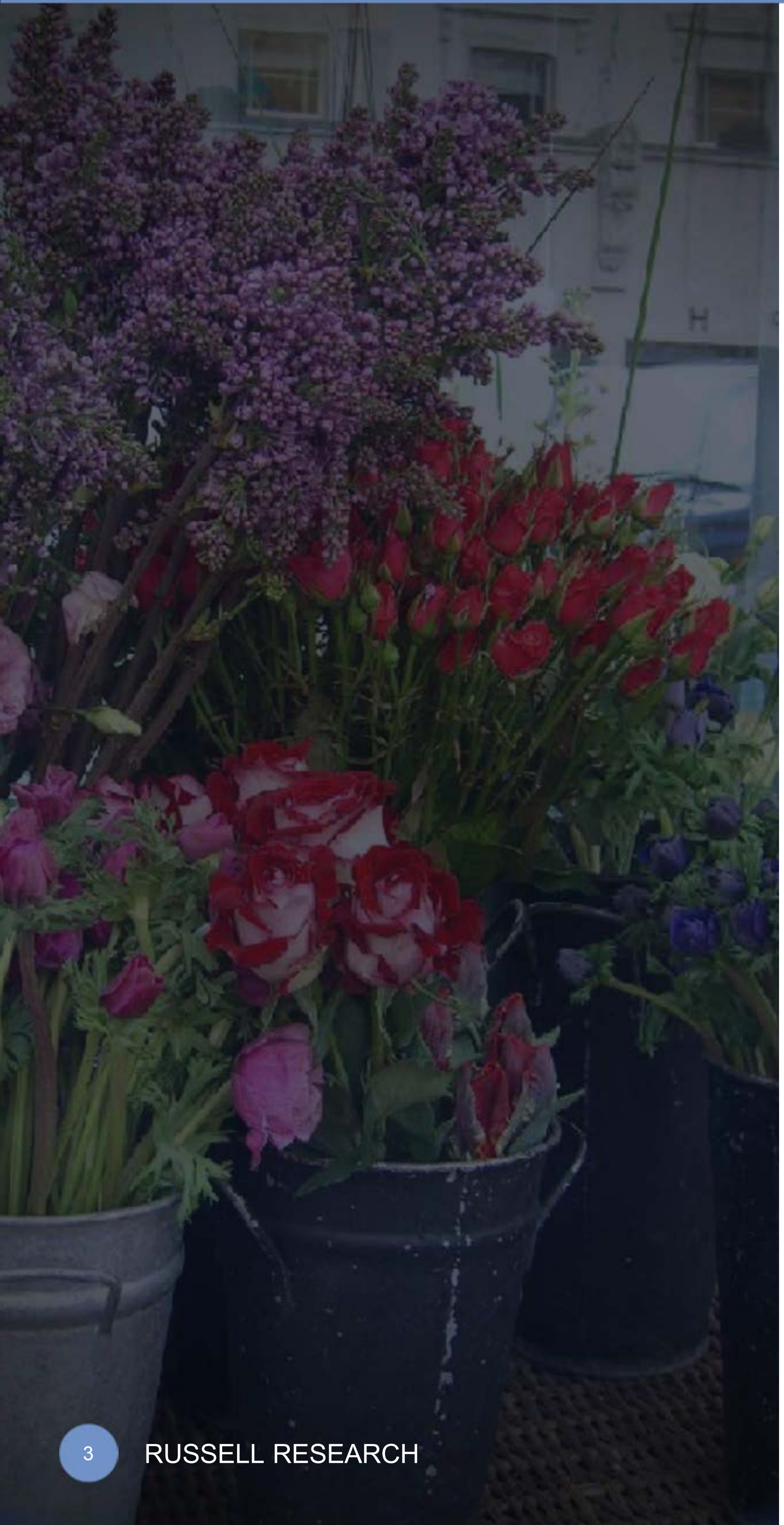


PURPOSE/
OBJECTIVES

RESEARCH PURPOSE & OBJECTIVES

The specific research objectives of the study were to:

- Measure appreciation and knowledge of flowers
- Determine flower purchase behavior for self and gift-giving
- Understand purchase behavior and drivers by channel
- Evaluate gift-giving occasions and the emotional component of giving/receiving flowers
- Understand the relative importance of buying local in the overall purchase decision
- Measure similarities and differences between generational segments
- Evaluate trends when compared to the 2009 research

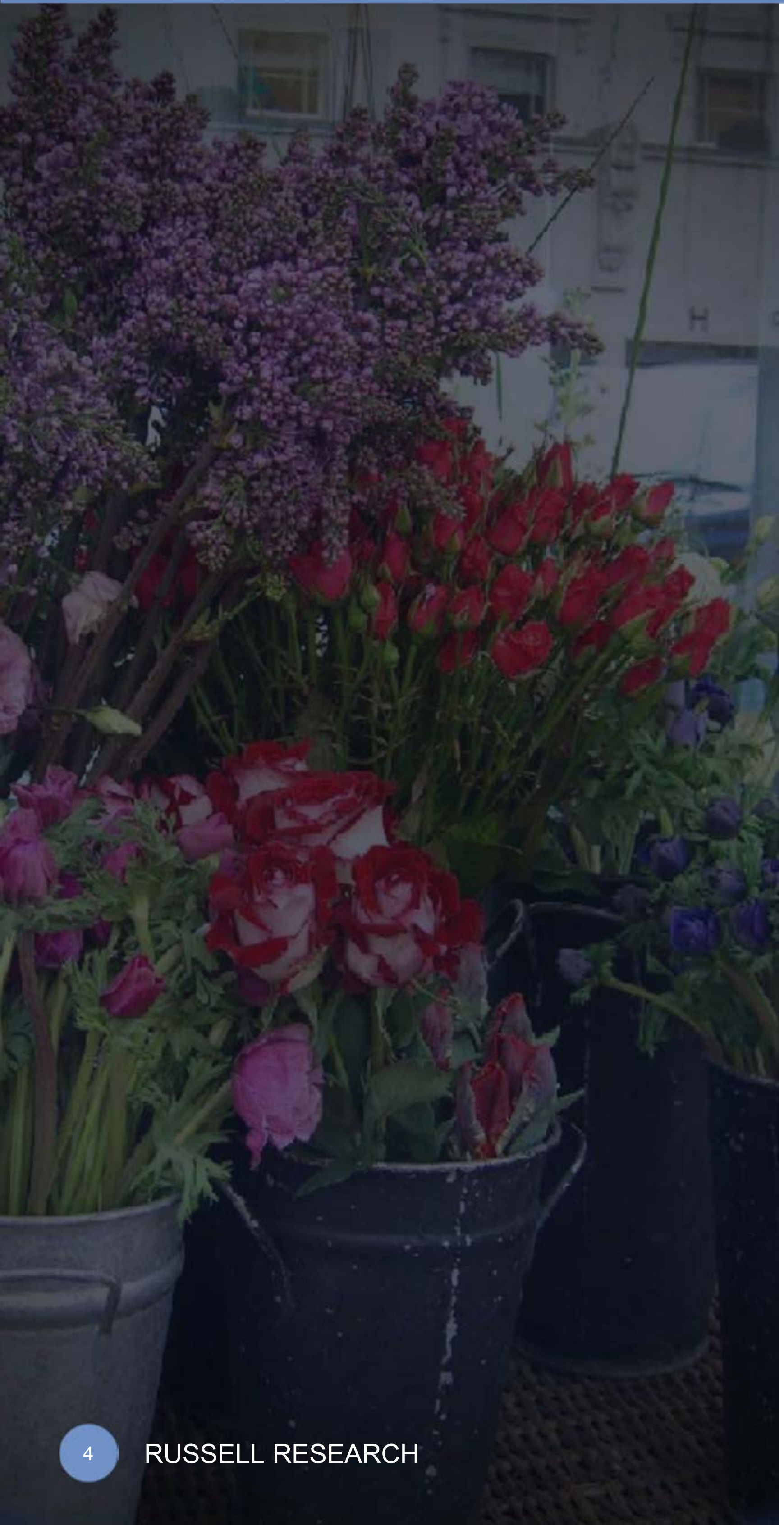


METHODOLOGY

METHODOLOGY

The study was conducted using an online methodology. A total of 3,114 interviews have been conducted using a random sample of consumers drawn from leading market research survey panels:

- Wave 1 = 1,557 interviews (January 15-21, 2009)
  - Generation Y (Ages 18-30): 519 interviews
  - Generation X (Ages 31-44): 512 interviews
  - Baby Boomers (Ages 45-60): 526 interviews
- Wave 2 = 1,557 interviews (January 7-15, 2016)
  - Generation Y (Ages 22-39): 522 interviews
  - Generation X (Ages 40-51): 510 interviews
  - Baby Boomers (Ages 52-70): 525 interviews



METHODOLOGY (CONT'D.)

METHODOLOGY

In order to qualify for study inclusion, respondents were screened to meet the following criteria:

- 50% Female, 50% Male
- Ages 18 – 60 (2009) ; Ages 22 – 70 (2016)
- Do not work in competitive industry
- Nationally representation

The data has been weighted to be balanced by gender, education and generation.

The overall margin of error for each wave was +/- 2.4%, and 4.3% for each generational segment. All research was carried out in compliance with all relevant legal and ethical requirements within the market and in compliance with ISO 20252:2012.

STATISTICAL NOTATION

The statistical significance of a result in this survey is the probability that the observed relationship (e.g., between variables) or a difference (e.g., between means) in a sample occurred by pure chance, and that in the population from which the sample was drawn, no such relationship or differences exist. Using less technical terms, one could say that the statistical significance of a result tells us something about the degree to which the result is "true". More technically, the value of the p-value represents a decreasing index of the reliability of a result. The higher the p-value, the less we can believe that the observed relation between variables in the sample is a reliable indicator of the relation between the respective variables in the population. Specifically, the p-value represents the probability of error that is involved in accepting our observed result as valid, that is, as "representative of the population." For example, a p-value of .1 (i.e.,1/10) indicates that there is a 10% probability that the relation between the variables found in our sample is a "fluke."

= Indicates figure is significantly higher than the other wave at a <u>95% confidence level</u> (i.e. p-value of .10 or less).

Y = Generation Y (1977-1994)

X = Generation X (1965-1976)

B = Baby Boomers (1946-1964)

EXECUTIVE SUMMARY

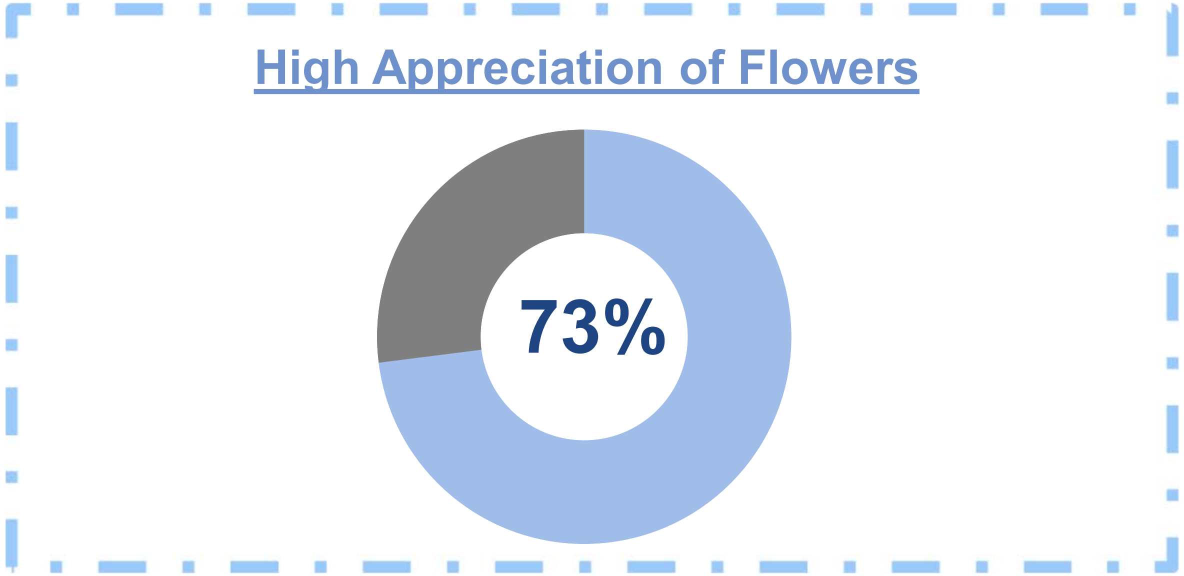
EXECUTIVE SUMMARY

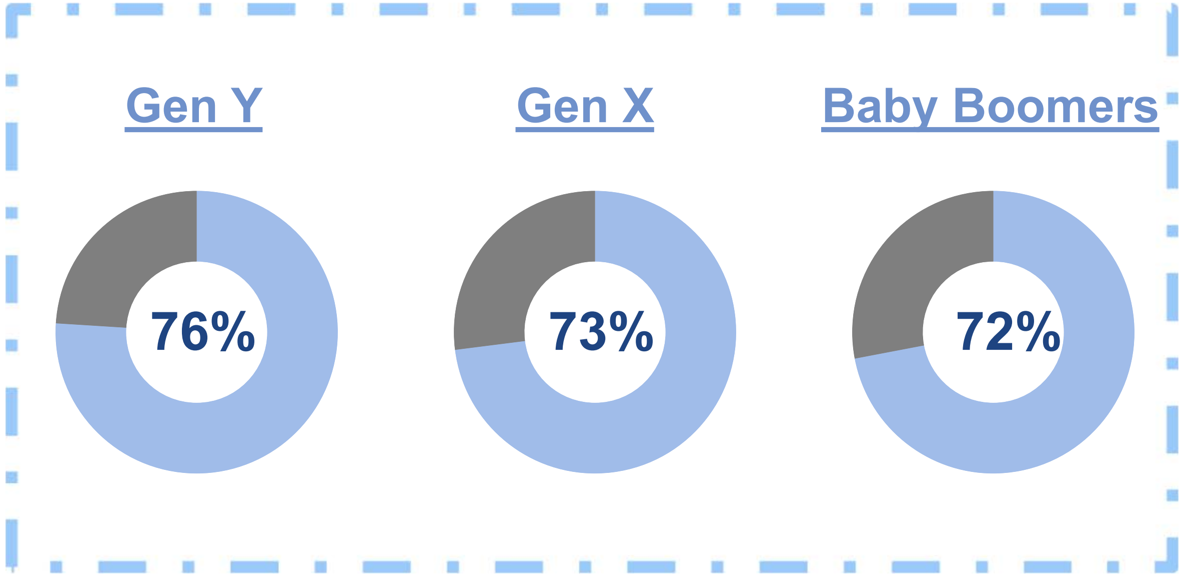
Flowers are widely valued across all generations.

- Nearly three in four consumers (73%) have a high appreciation of flowers, a significant increase in appreciation compared to 2009 findings (66%). This increase was driven by much stronger appreciation among Generations Y (60% 2009 → 76% 2016) and X (64% → 73%) compared to the previous research. Appreciation has remained consistent among Baby Boomers.

There is a strong sensory & emotional connection with flowers.

- From a sensory perspective, consumers strongly agree the color of flowers adds to the impact of a gift (70%), the sight and smell can improve my mood (69%), and the fragrance is important to them (64%).
- Further, nearly two-thirds feel special when receiving flowers as a gift (65%), find flowers to be an emotional gift (64%), and three in five believe gifts of flowers have a special meaning unlike any other gift (60%).
- These all represent increases over 2009 findings.





Generation Y (1977-1994)
Generation X (1965-1976)
Baby Boomers (1946-1964)

EXECUTIVE SUMMARY (CONT'D.)

<u>Gifting</u> continues to be the most common reason for purchasing flowers.

- One-half of consumers (50%) have purchased flowers for a traditional holiday/ occasion gift for someone else in the past year, with this finding very consistent by age (48% - 51% across generations) and over time (53% in 2009).
- Further, and despite a significant decrease since 2009, gifting as a "just because" is the second most popular purchase situation (48% 2009 → 42%).
- There is power in gift <u>giving</u> – nine in ten (89%) remember the last time they gave someone flowers for a gift compared to a slight majority (56%) who remember the last time they were received. Females (77%) are more than twice as likely as men (34%) to remember the last time they received flowers.
- Flower gift givers are viewed as being caring (55%), personal (54%), and sentimental (49%).

Local florists remain the most widely shopped channel for gift purchasing while supermarkets have declined in popularity.

- Four-fifths of consumers (82%) typically make gift purchases at local florists, including nearly two-thirds who shop in-person.
- During this time, there has been a significant decrease for supermarkets (68% 2009 → 58% 2016).
- Online (national floral services, florist website) and farmer's markets have risen in popularity since 2009 as gift-giving channels.

EXECUTIVE SUMMARY (CONT'D.)

Despite gifting being most popular, there remains a high percentage of consumers who <u>purchase flowers for themselves</u>.

- Two in five consumers (40% vs. 41% in 2009) have purchased flowers in the past year for home decoration and more than one-fifth (22% vs. 21% in 2009) purchased them as a present for themselves. These have both increased as reasons among Generation Y.
- Those who purchase flowers for home decoration are equally likely to buy them for everyday décor (42%), a personal pick-me-up (41%), or holiday décor (39%).

Local florists and supermarkets continue to have near equal share for everyday flower purchases and there has been a notable rise in farmer's markets.

- Three in four consumers (75%) typically purchase flowers for themselves at local florists, near equal to 2009 findings (76%).
- Seven in ten consumers (70%) typically purchase flowers for themselves at supermarkets and two in five purchase at nursery or garden centers (42% both studies).
- Farmer's markets are now the fourth most popular channel for self purchases (25% in 2009 → 30% in 2016), driven by a sharp increase among Generation Y (24% → 33%).

EXECUTIVE SUMMARY (CONT'D.)

There is a positive purchase trend in flower purchases.

- Nearly one in five consumers (18%) are now purchasing flowers more frequently for themselves in comparison to previous years. This is double the percentage reported in 2009 (9%). Additionally, three in ten (29%) indicate they're now purchasing less, compared to 54% in 2009.
- The percentage purchasing flowers as gifts more frequently has remained static since 2009 (32% both years), however the percentage purchasing less frequently has dramatically decreased (43% 2009 → 18% 2016).

The positive trend is likely in part due to cost being less of a purchase barrier.

- One-third of consumers (34%) indicate they don't purchase flowers more often due to them being viewed as too expensive/a luxury. This is significantly lower than the nearly one-half (46%) who identified it as a barrier in 2009. Cost is now significantly less of a barrier across all three generations included in the study – likely a direct effect of the vast difference in the economic climate in 2016.

Houseplants benefit from this trend.

- Nearly one-half of consumers (46%) plan to purchase houseplants in the next six months, significantly higher than intent found in 2009 (37%). This increase was driven by Generations Y & X, while Baby Boomers are slightly less likely to purchase houseplants compared to 2009.

Key Barriers to Purchase

	2009	2016
Don't Last Very Long	47%	47%
Too Expensive	46%	34% ↓
Don't Always Think About It	34%	28% ↓
Difficult to Maintain	12%	15% ↑

Houseplant Purchase Intent

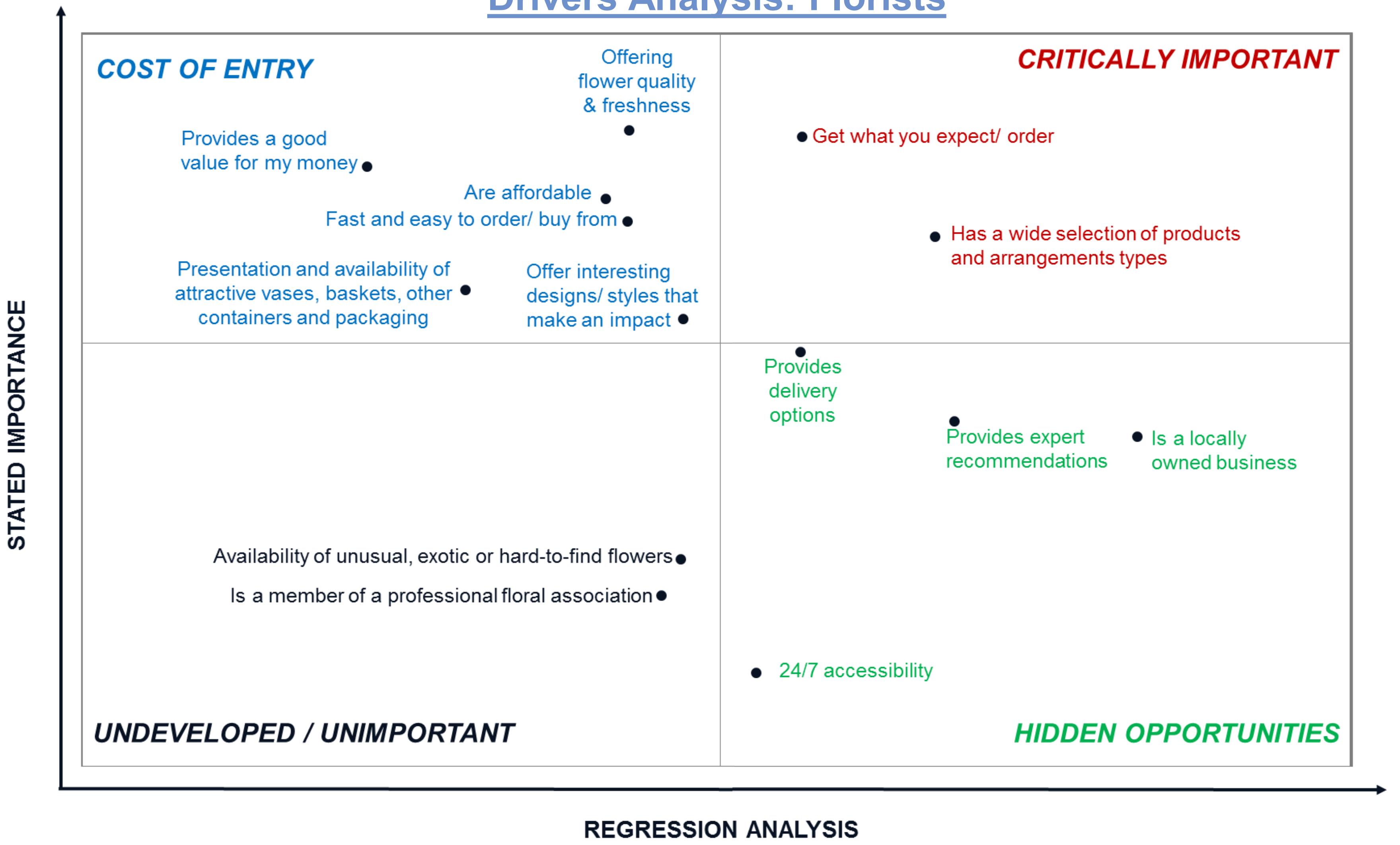
	2009	2016
Overall	37%	46% ↑
Generation Y	33%	51% ↑
Generation X	33%	46% ↑
Baby Boomers	45%	39%

EXECUTIVE SUMMARY (CONT'D.)

Although not explicitly stated as important to consumers, being local and providing expert recommendations are key drivers of selecting a florist, and are therefore hidden opportunities in this channel.

- Three in five consumers (60%) identify being a locally owned business as very important when considering a flower purchase at a florist. This was among the least widely important attributes.
- However, when using regression analysis to identify key drivers of florist consideration, locally owned was the most important driver and providing expert recommendations was second most important.
  - This suggests the role of the florist as expert is understated in consumer minds, though is a differentiator, and is particularly important because only 47% of consumers indicate they know which flowers are appropriate for different situations.
- Having a wide selection of products and arrangement types and getting what you expect/order were the only attributes widely important on both the stated and derived levels, and delivering on these attributes should drive consideration.
- Although closely associated with the channel, being a member of a florist association was not particularly a driver when selecting a local florist (51% important), in comparison to other selection attributes. This may be due to a belief that all florists meet this criteria – and therefore it is not a channel differentiator.

Drivers Analysis: Florists



EXECUTIVE SUMMARY (CONT'D)

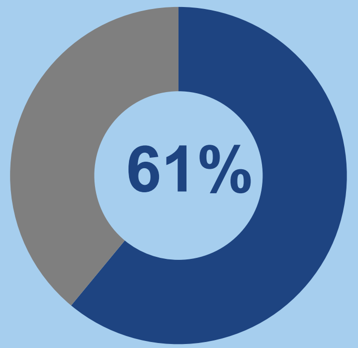
Many of the generational differences seen in 2009 have narrowed in 2016, primarily due to increases in appreciation and connection among Generation Y. The primary areas of difference which remain between generations revolves around <u>channel usage</u> and <u>emotional connection</u>.

- Generation X is significantly more likely than other generations to consider purchasing flowers at a florist (67% vs. 61% Generation Y, 56% Baby Boomers).
- While in-person is the most widely preferred method across all generations, Generation Y is significantly more likely than other generations to prefer purchasing flowers online (34% vs. 25% Gen X, 24% Baby Boomers) and to consider the Internet in the future (44% vs. 38% Gen X, 32% Boomers).
  - This extends to being most likely to purchase flowers for themselves using <u>local florist websites</u> (28% vs. 25% Generation X, 15% Baby Boomers).
- Baby Boomers remain far more likely to have an emotional connection with flowers in regards to gift giving.
  - They are far more likely than other generations to view gift giving as <u>caring</u> (63% vs. 46% Y, 54% X), <u>personal</u> (61% vs. 44% Y, 56% X), <u>sentimental</u> (53% vs. 42% Y, 51% X), and <u>tasteful</u> (52% vs. 31% Y, 45% X).
  - Further, they are by far most likely to view those who give flowers as <u>thoughtful</u> (78% vs. 59% Y, 70% X), <u>sincere</u> (58% vs. 47% Y, 49% X), and <u>taking the time to give something special</u> (55% vs. 36% Y, 47% X).

SNAPSHOT: GENERATION Y (AGES 22-39)

Gen Y values accessibility when shopping for flowers (using multiple channels – including social media for info), are the segment most likely to buy on impulse.

Florist Consideration



FLORIST PURCHASES

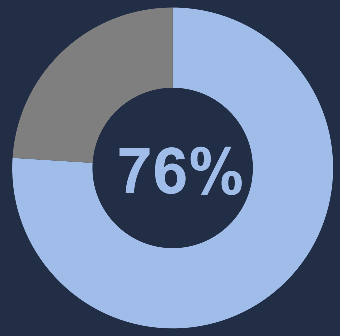
For Self (75%)

For Gift (82%)

Houseplant Purchase Intent

(51%)

High Appreciation of Flowers



Generational Differentiators

FLOWER IMAGERY

Buy Flowers On Impulse (50%)

Buy Flowers To Make Myself Feel Better (55%)

Sophisticated Gift (25%)

GIFT OCCASIONS

Date (17%)

FLOWER BARRIERS

Too Traditional (15%)

FLORIST IMPORTANCE

Availability of Unusual, Exotic or Hard-To-Find Flowers (61%)

24/7 Accessibility (55%)

CHANNELS (for self)

Farmer's Market (33%)

Convenience Store (24%)

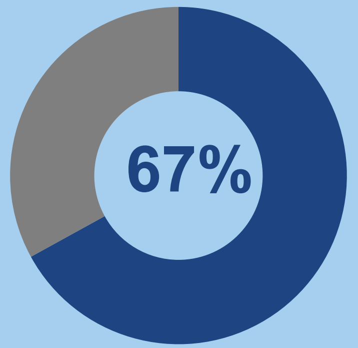
FLOWER INFORMATION SOURCES

Friends and family	TV	Social media	Email	Discussions with florists/ experts	National magazines	Online news outlets	Blogs	Newspapers	Books	Radio	Colleagues
44%	33%	32%	24%	22%	16%	16%	14%	12%	10%	8%	7%

SNAPSHOT: GENERATION X (AGES 40-51)

Gen X is the most likely group to require convenience (e.g. delivery options), is most likely to use a florist, and has the highest incidence of purchasing flowers for anniversaries.

Florist Consideration



FLORIST PURCHASES

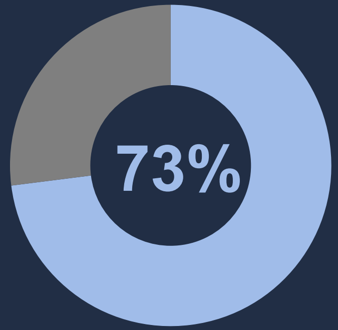
For Self (80%)

For Gift (85%)

Houseplant Purchase Intent

(46%)

High Appreciation of Flowers



Generational Differentiators

FLOWERS IMAGERY

Color of flowers adds impact to gift (74%)

FLOWER BARRIERS

NONE

GIFT OCCASIONS

Anniversaries (41%)

Just Because (54%)

FLORIST IMPORTANCE

Offer interesting designs/styles that make an impact (71%)

Provides Delivery Options (69%)

CHANNELS (for gift)

Florist (85%)

Nursery/Garden Center (35%)

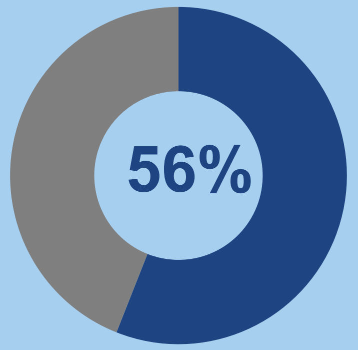
FLOWER INFORMATION SOURCES

Friends and family	TV	Social media	Email	Discussions with florists/ experts	Online news outlets	National magazines	Newspapers	Colleagues	Radio	Books	Blogs
47%	37%	29%	27%	27%	19%	17%	14%	9%	8%	5%	5%

SNAPSHOT: BABY BOOMERS (AGES 52-70)

Baby Boomers most believe they appreciate flowers and are more likely than other generations to purchase them for birthdays and funerals.

Florist Consideration



FLORIST PURCHASES

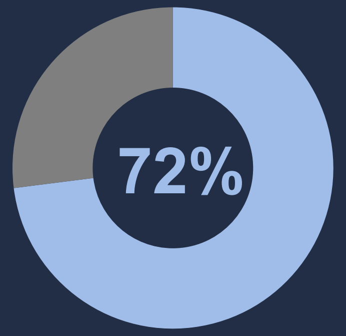
For Self (69%)

For Gift (82%)

Houseplant Purchase Intent

(39%)

High Appreciation of Flowers



Generational Differentiators

FLOWERS IMAGERY

Caring (63%)

Tasteful (52%)

Traditional (45%)

Generation has greatest appreciation for flowers (48%)

GIFT OCCASIONS

Funeral (30%)

Birthday (55%)

FLORIST IMPORTANCE

Offering flower quality and freshness (82%)

CHANNELS (for self)

Supermarkets (77%)

FLOWER BARRIERS

Don't last very long (54%)

Too Expensive (40%)

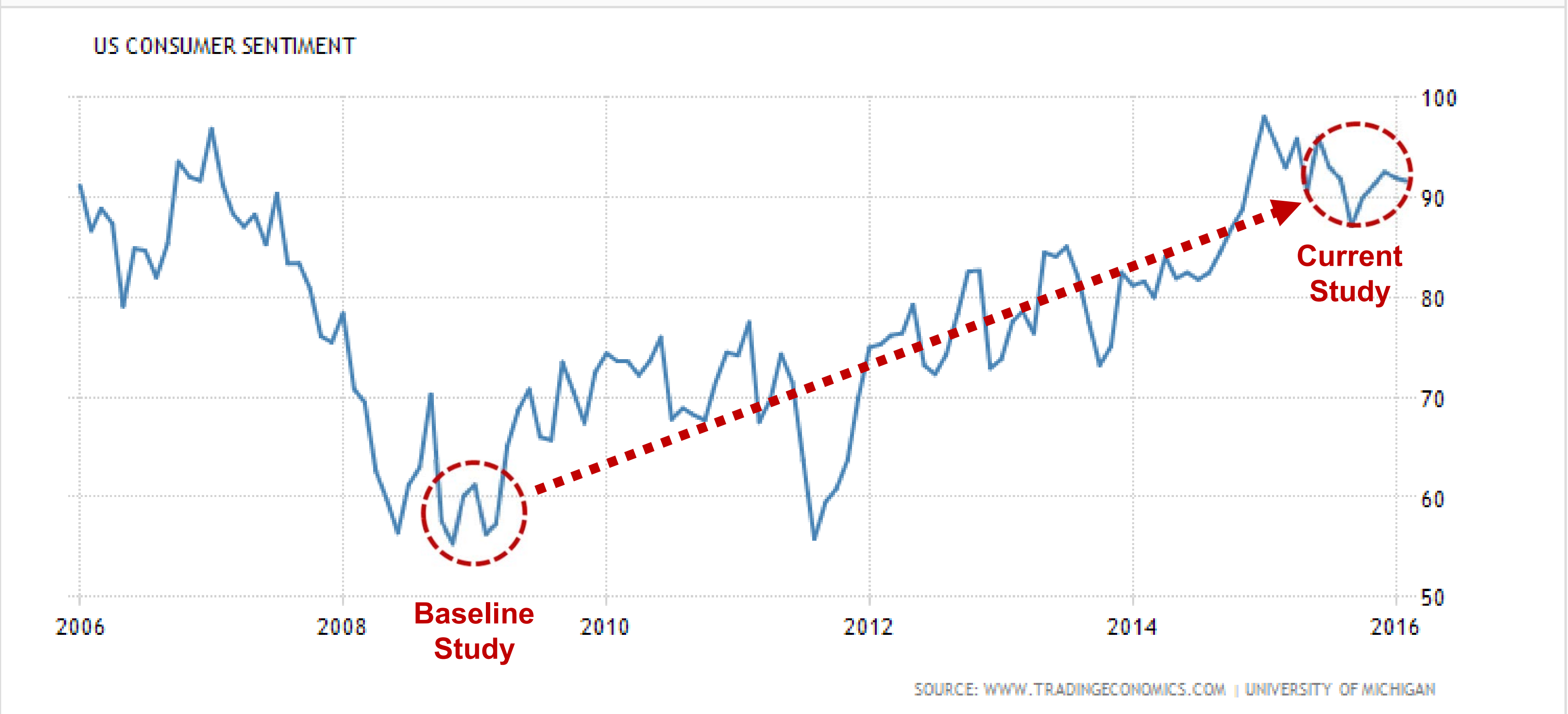
FLOWER INFORMATION SOURCES

Friends and family	TV	Discussions with florists/ experts	Email	National magazines	Newspapers	Social media	Online news outlets	Books	Colleagues	Radio	Blogs
48%	35%	32%	31%	22%	22%	14%	11%	8%	6%	6%	5%

RESEARCH IMPLICATIONS

The overall results show considerable attitudinal and behavioral improvement from the 2009 research.

- We believe the results represent and mirror the overall sentiment of the U.S. population during these two points in time.
- This includes significant increases in:
  - Flower Appreciation
  - Flower Attitudes & Imagery
  - Flower Perceived Knowledge
  - Recency of Flower Purchase
  - Flower Purchase Frequency
  - Houseplant Purchase Interest
- Many of these increases were more apparent among the two younger generations.



RESEARCH IMPLICATIONS (CONT'D.)

Friends/family and social media are two of the primary ways in which consumers like to receive information and trends about flowers.

- This suggests the creation of "shareable" experiences is important for florists, which can generate both positive word-of-mouth and shares/posts on social media pages which are viewed by friends and family.
- Further, there is an education opportunity for local florists – less than one-half of consumers indicate they know which flowers are appropriate for specific situations and regression analysis identified the providing of expert recommendations as a hidden opportunity.
- This can be a content opportunity for social media in the form of blog posts, Pinterest pages, or YouTube videos, as well as creating florist recommendations within the in-store and online retail spaces (e.g. often seen in wine or specialty stores).
  - Purchase occasions also provide content opportunities – for example, flowers have surpassed jewelry as a popular anniversary gift, particularly among Generation X, while Generation Y is using flowers for holiday gifts.
- However, it's important to note Baby Boomers still prefer traditional marketing channels for information.

Although flowers are now less likely to be viewed as a luxury item, florists still need to deliver on value.

- There has been a significant decrease in the percentage of consumers who identified flowers as too expensive / a luxury as a barrier to purchasing more often.
- However providing a good value for the money and being affordable were both identified as cost of entry attributes in the regression analysis. These two attributes were important to all three generations.

RESEARCH IMPLICATIONS (CONT'D.)

It's all about the emotional and sensory experiences.

- Sensory elements such as color, sight, and smell, along with the emotional attributes of feeling special and having special meaning, are strongly connected with buying, giving, and receiving flowers.
- The sensory experience can be particularly reinforced in-store and the usage of color on web/print materials can be very effective.
- Further, the usage of emotion in communications and marketing materials is more likely to create engagement, compared to focusing on the rational drivers of purchase.

Local and convenience are both opportunities to be leveraged.

- Being a locally owned business is a hidden opportunity for florists and being involved in the community reinforces this association. One potential opportunity is participation in local farmer's markets – which is growing in popularity as a channel for purchasing flowers and is a way to particularly connect with Generation Y.
- Another hidden opportunity which is likely only going to increase in importance is convenience. Providing an omni-channel experience which includes 24/7 accessibility (website), delivery, and pick-up options are widely important to the target audience, with the busy Generation X more likely than others to value delivery.

RESEARCH IMPLICATIONS (CONT'D.)

Houseplants can provide an increased revenue stream for florists.

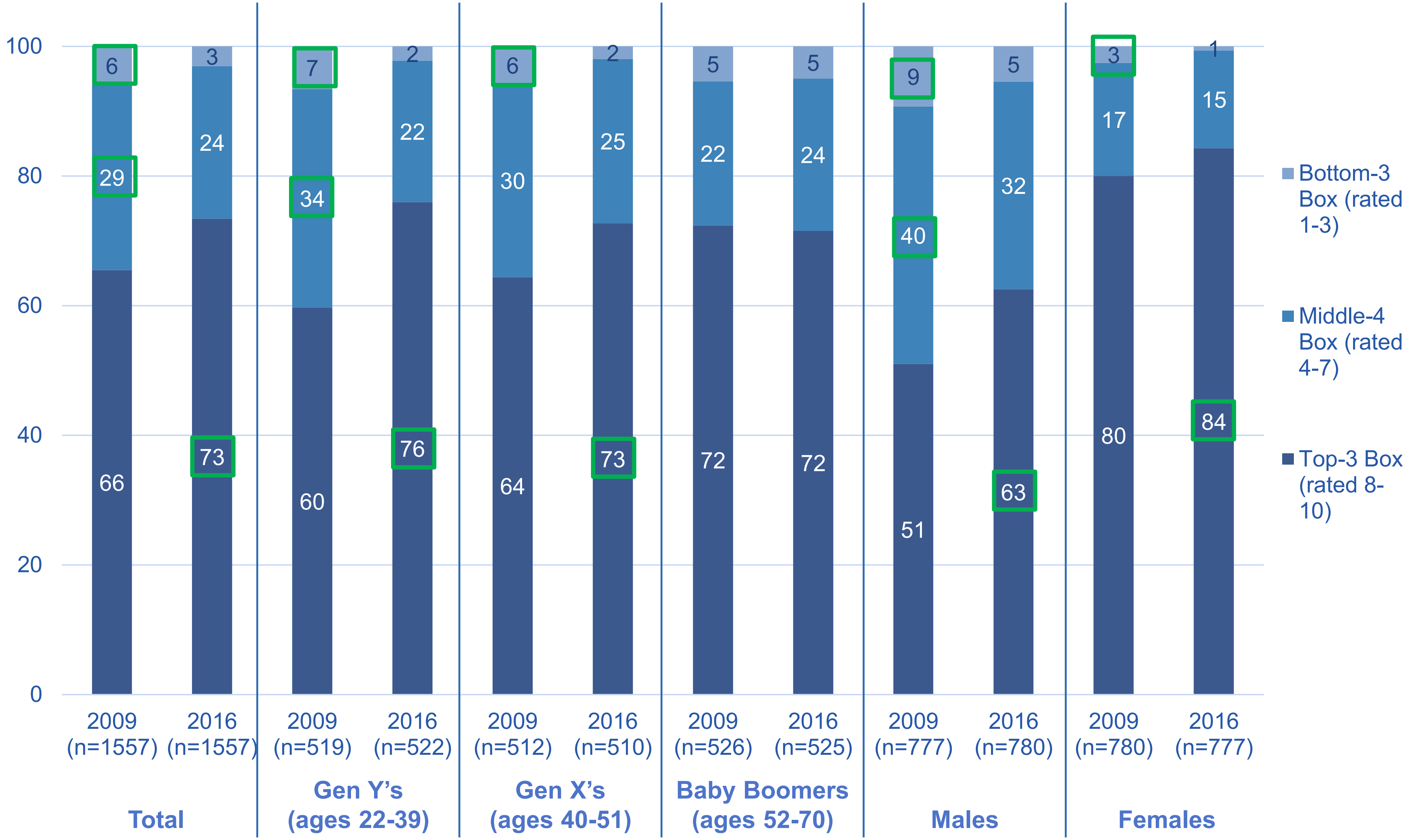
- Consideration of houseplants is on the rise among Generations Y and X, complementing consumer usage of flowers for everyday décor in the home.
- However florists are not the most widely shopped channel for houseplants. Communication and promotion of houseplants would likely be necessary for florists to become the top-of-mind option and steal share from nursery/garden centers and supermarket/grocery stores.

DETAILED FINDINGS:
FLOWER ATTITUDES & IMAGERY

OVERALL FLOWER APPRECIATION

Overall, nearly three quarters of consumers have a strong appreciation of flowers, with this level of appreciation consistent across generations.

Compared to 2009, there has been a positive shift in flower appreciation among Generations Y and X, while it has remained the same among Baby Boomers. This shift can also be seen in both males and females.



Base: Total Respondents
Q. 6. Overall, how much do you personally appreciate flowers? Please use a scale of 1 to 10 where "1" means you have a "Very Low Appreciation of Flowers" and "10" means you have a "Very High Appreciation of Flowers." (Choose One Answer)

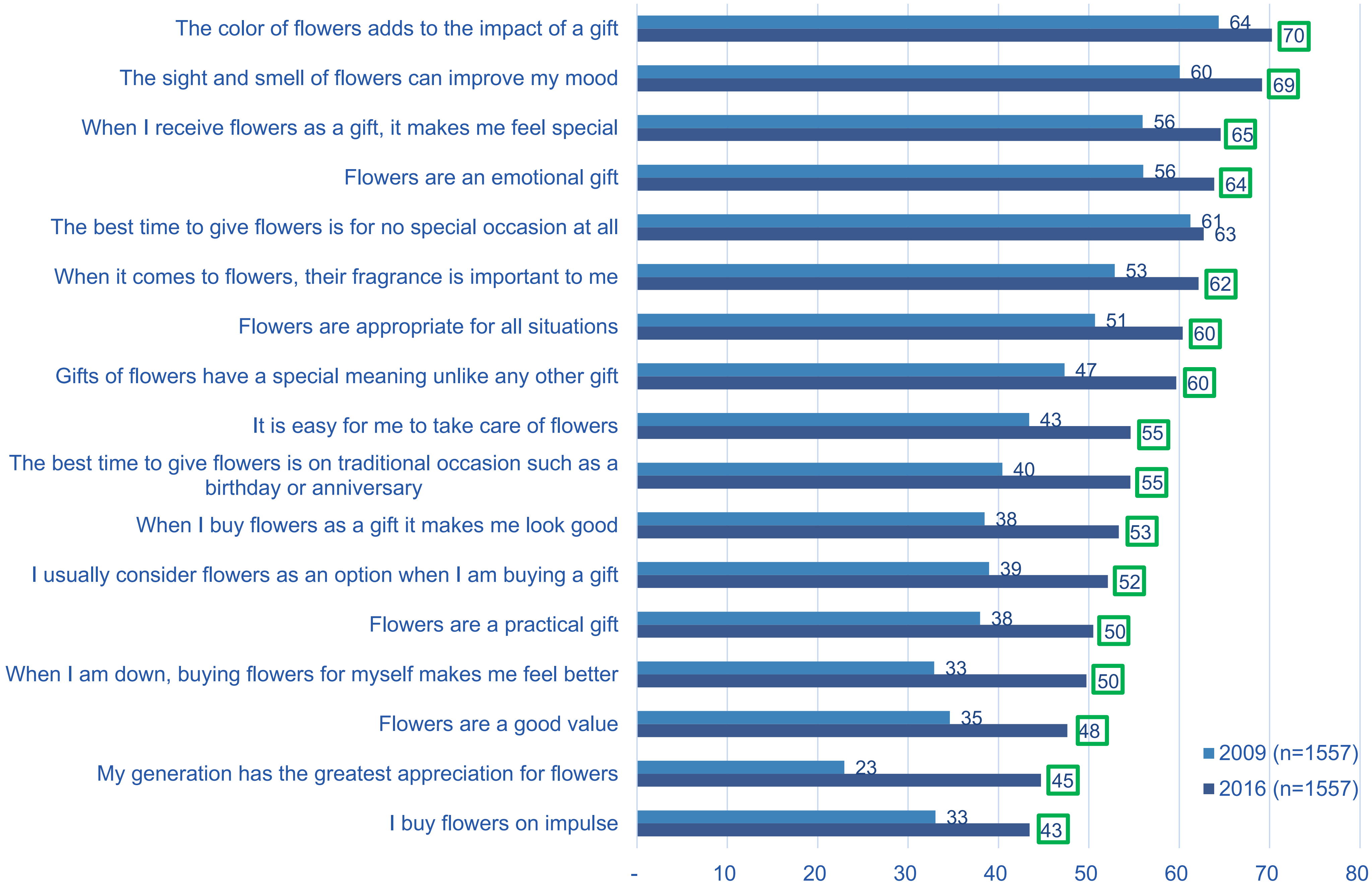
FLOWER ATTITUDES & IMAGERY *(RATED 8, 9 OR 10)*

The sensory and emotional aspects of flowers and gift giving generate the strongest agreement.

In particular, three-fifths or more consumers agree sensory attributes including the *color* of flowers adding to the impact of a gift, the *sight* and *smell* of flowers improving mood, and *fragrance* being important.

Further, nearly two-thirds indicate receiving flowers makes them *feel special* and flowers are an *emotional gift*.

While the level of agreement has significantly increased nearly across the board for all attributes, the hierarchy of agreement has remained relatively unchanged since 2009.



Base: Total Respondents
Q. 7. Please indicate how strongly you agree or disagree with each of the following statements, using a scale of 1 to 10 where “1” means you “Strongly Disagree” and “10” means you “Strongly Agree.” (Choose One Answer For Each)

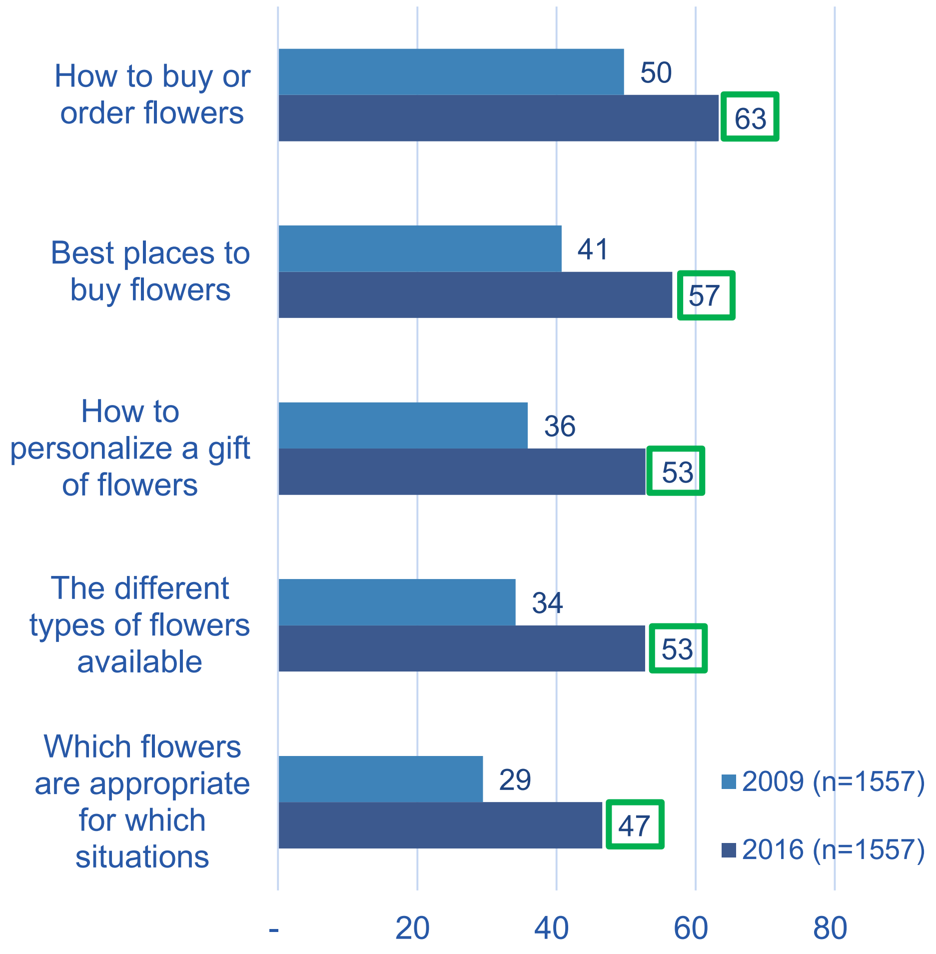
FLOWER ATTITUDES & IMAGERY *(RATED 8, 9 OR 10)*

	Total		Gen Y's		Gen X's		Baby Boomers		Males		Females	
	2009	2016	2009	2016	2009	2016	2009	2016	2009	2016	2009	2016
Total Respondents	(1557)	(1557)	(519)	(522)	(512)	(510)	(526)	(525)	(777)	(780)	(780)	(777)
	%	%	%	%	%	%	%	%	%	%	%	%
The color of flowers adds to the impact of a gift	64	70	60	68	64	74	69	69	58	64	71	76
The sight and smell of flowers can improve my mood	60	69	55	68	61	71	65	69	46	57	74	81
When I receive flowers as a gift, it makes me feel special	56	65	52	65	56	66	60	63	34	48	78	81
Flowers are an emotional gift	56	64	48	65	61	66	59	61	55	61	57	67
The best time to give flowers is for no special occasion at all	61	63	57	62	63	63	64	63	54	56	69	70
When it comes to flowers, their fragrance is important to me	53	62	47	64	55	65	57	58	44	57	62	67
Flowers are appropriate for all situations	51	60	44	61	49	61	59	60	43	50	58	71
Gifts of flowers have a special meaning unlike any other gift	47	60	41	61	47	62	54	56	44	54	50	65
It is easy for me to take care of flowers	43	55	39	57	45	52	47	55	38	47	49	62
The best time to give flowers is on traditional occasion such as a birthday or anniversary	40	55	37	57	42	56	42	50	42	55	39	55
When I buy flowers as a gift it makes me look good	38	53	38	59	39	55	38	46	46	54	31	52
I usually consider flowers as an option when I am buying a gift	39	52	35	57	37	51	45	48	37	50	41	55
Flowers are a practical gift	38	50	35	55	38	50	41	46	37	48	39	53
When I am down, buying flowers for myself makes me feel better	33	50	25	55	34	48	40	46	19	39	47	60
Flowers are a good value	35	48	34	53	34	50	36	40	34	44	36	51
My generation has the greatest appreciation for flowers	23	45	15	42	19	44	35	48	21	43	25	47
I buy flowers on impulse	33	43	24	50	34	41	41	39	32	39	34	48

For the most part, attribute agreement was very consistent by generation, mostly as a result of the majority of increases being driven by the two younger generations. Generations Y and X are more likely than Baby Boomers to indicate fragrance is important to them, buying flowers as a gift makes them look good, and viewing flowers as a good value. Generation Y is significantly more likely than other generations to be flower impulse shoppers.

Base: Total Respondents
Q. 7. Please indicate how strongly you agree or disagree with each of the following statements, using a scale of 1 to 10 where "1" means you "Strongly Disagree" and "10" means you "Strongly Agree." (Choose One Answer For Each)

FLOWER PERCEIVED KNOWLEDGE *(RATED 8, 9 OR 10)*

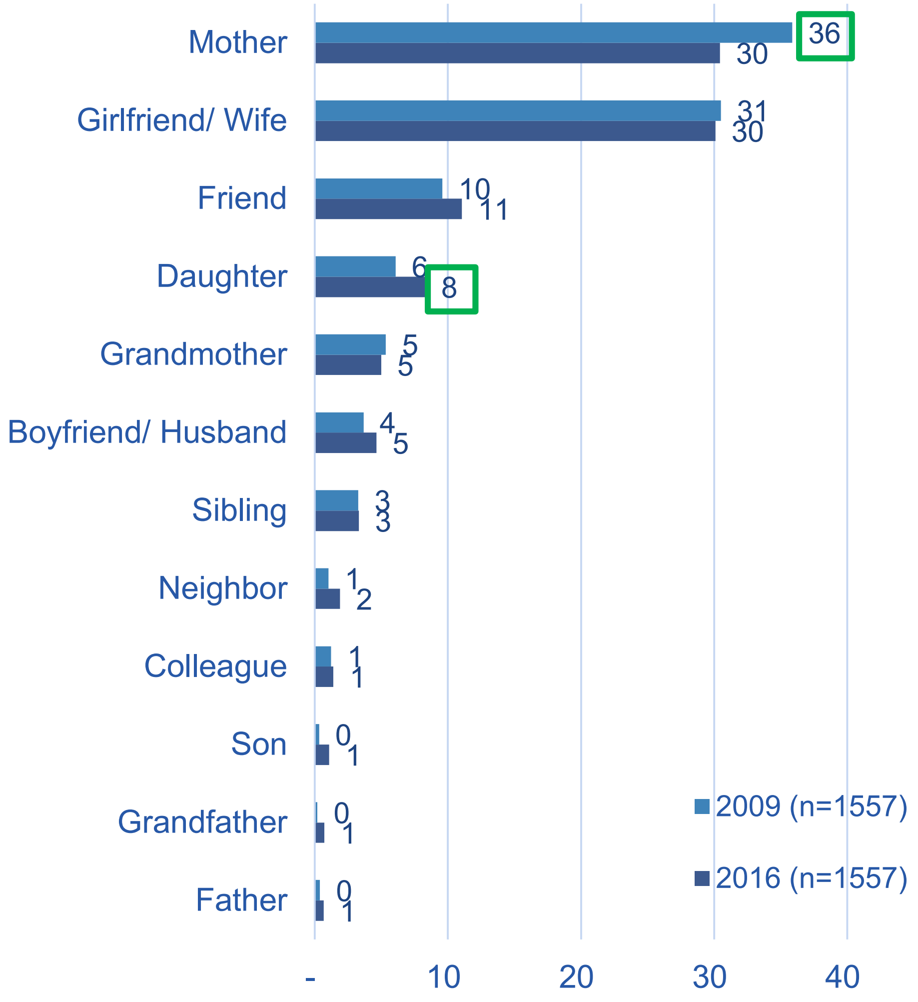


	Gen Y's		Gen X's		Baby Boomers		Males		Females	
	2009	2016	2009	2016	2009	2016	2009	2016	2009	2016
Total Respondents	(519)	(522)	(512)	(510)	(526)	(525)	(777)	(780)	(780)	(777)
	%	%	%	%	%	%	%	%	%	%
How to buy or order flowers	48	65	50	64	51	61	45	57	54	69
Best places to buy flowers	34	58	43	58	46	54	39	54	42	59
How to personalize a gift of flowers	36	57	36	55	36	46	32	48	39	58
The different types of flowers available	33	56	31	55	38	47	31	49	37	57
Which flowers are appropriate for which situations	30	54	27	48	31	38	29	44	30	49

Consumer knowledge of flower purchasing has increased over the past 7 years, with nearly two-thirds indicating they know how to buy or order flowers. However, less than one-half of the target audience understands which flowers are appropriate by situation – including less than two-fifths of Baby Boomers.

Base: Total Respondents
Q. 8. How would you rate your knowledge of the following aspects of flowers? Please use a scale of 1 to 10 where "1" means you are "Not At All Knowledgeable" and "10" means you are "Extremely Knowledgeable." (Choose One Answer For Each)

PERSON IN LIFE WHO MOST APPRECIATES FLOWER

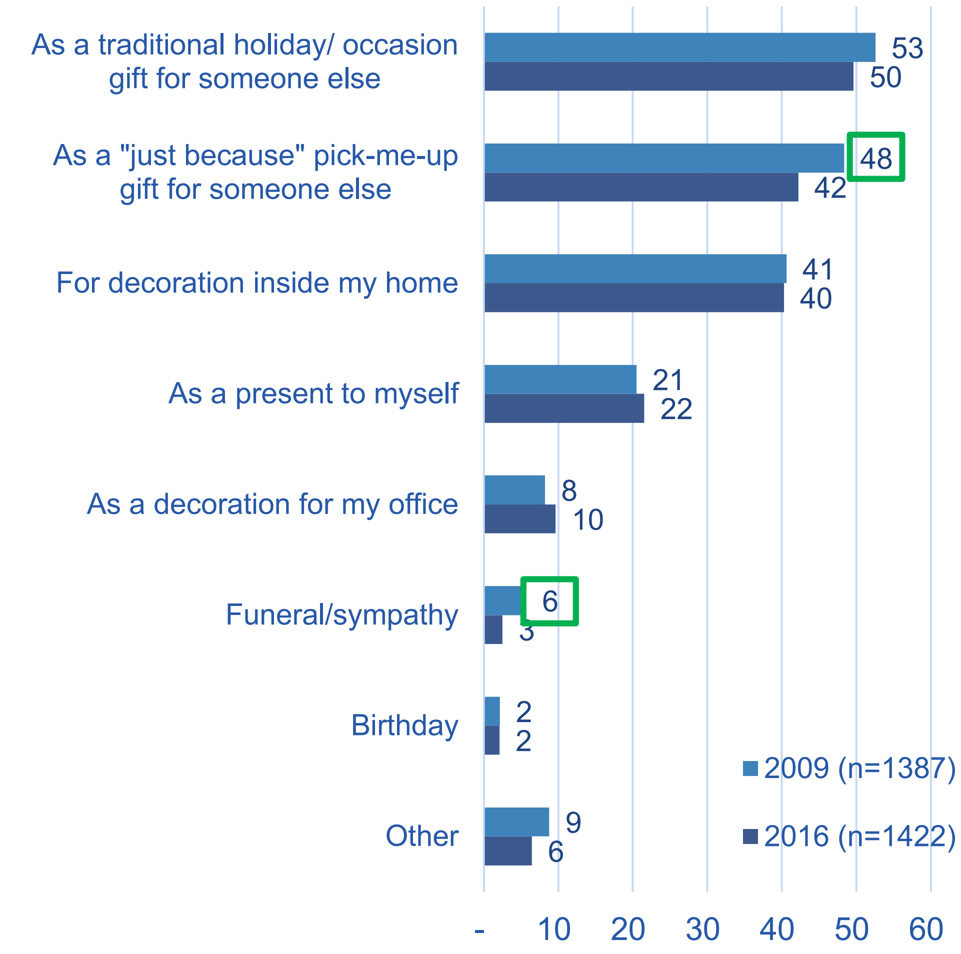


	Gen Y's		Gen X's		Baby Boomers	
	2009	2016	2009	2016	2009	2016
Total Respondents	(519)	(522)	(512)	(510)	(526)	(525)
	%	%	%	%	%	%
Mother	42	34	37	36	28	21
Girlfriend/ Wife	33	27	30	30	29	33
Friend	4	10	10	7	14	16
Daughter	2	3	7	8	9	13
Grandmother	8	9	5	5	3	1
Boyfriend/ Husband	4	7	4	4	4	3
Sibling	3	2	3	4	5	4
Neighbor	1	1	1	2	2	3
Colleague	1	1	1	2	1	1
Son	0	1	-	1	1	1
Grandfather	0	1	0	1	-	0
Father	1	1	-	0	1	0
Other	1	1	2	0	4	2

Females are widely seen as those most appreciative of flowers, with three in ten citing their mother and three in ten naming their girlfriend or wife. Friends and daughters are next most seen as having appreciation of flowers.

Base: Total Respondents
Q. 9. Aside from yourself, who do you think most appreciates flowers among the people you know? (Choose One Answer)

REASONS PURCHASED FLOWERS IN PAST YEAR

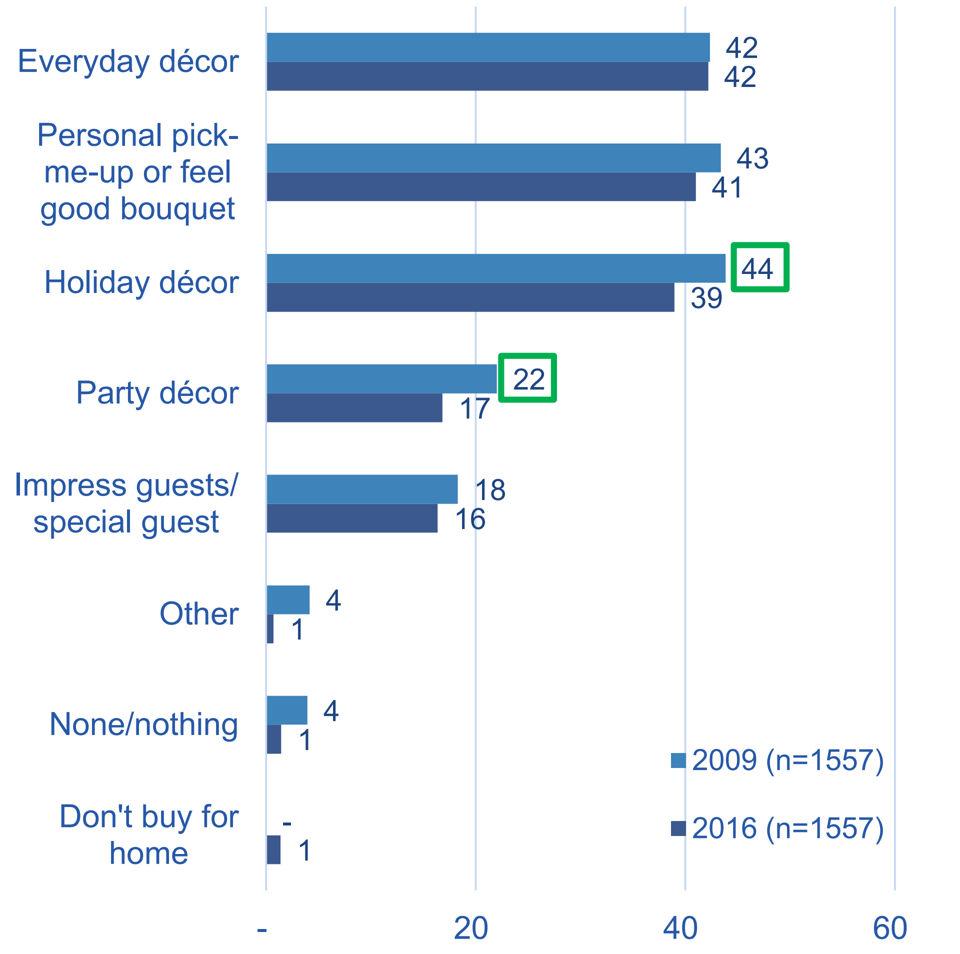


	Gen Y's		Gen X's		Baby Boomers	
	2009	2016	2009	2016	2009	2016
Total Purchased Flowers In Past Year	(449)	(491)	(453)	(463)	(485)	(468)
	%	%	%	%	%	%
As a traditional holiday/ occasion gift for someone else	53	48	53	51	52	50
As a "just because" pick-me-up gift for someone else	51	41	46	44	48	43
For decoration inside my home	36	41	43	43	43	37
As a present to myself	18	22	21	20	22	22
As a decoration for my office	10	15	8	8	7	5
Funeral/sympathy	3	1	6	2	8	4
Birthday	2	1	2	2	3	4
Other	9	5	8	6	9	9

Traditional holiday/occasional gifts remain the most common reason for purchasing flowers in the past year and two in five have made a flower purchase as either a "just because" pick-me-up gift for someone or for home decoration. There has been a significant decrease in "just because" gift giving.

Base: Total Purchased Flowers In Past Year
Q. 2. Which of the following are reasons you have purchased flowers within the last year? (Check All That Apply)

HOME FLOWER USAGE (ASIDE FROM GIFTS)



	Gen Y's		Gen X's		Baby Boomers	
	2009	2016	2009	2016	2009	2016
Total Respondents	(519)	(522)	(512)	(510)	(526)	(525)
	%	%	%	%	%	%
Everyday décor	45	46	40	40	42	41
Personal pick-me-up or feel good bouquet	35	37	45	40	51	46
Holiday décor	39	33	45	40	48	44
Party décor	23	20	21	15	22	16
Impress guests/ special guest	23	19	18	18	14	13
Other	3	1	3	0	6	1
Don't buy for home	-	0	-	1	-	2
None/nothing	5	1	4	1	2	3

Other than gifts, <u>everyday décor</u>, <u>personal pick-me-ups</u>, and <u>holiday décor</u> remain the most common uses of flowers in the home. There has been a slight decrease in usage of flowers for holiday and party décor, with decreases in use across all three generations.

Base: Total Respondents
Q. 25. Aside from gifting, what is your primary use of flowers at home? (Check All That Apply)

DETAILED FINDINGS: FLOWER GIFT-GIVING

FLOWERS IN GIFT GIVING SITUATIONS

Overall, flowers remain the top gift choice for both romantic situations and housewarming parties, and remain a second or third choice for other situations.

They have increased in popularity for holiday presents, anniversaries, and party/host gifts, surpassing jewelry for anniversaries, and narrowing the gap vs. wine/alcohol for party gifts.

The results suggest there could be a long-term trend in giving flowers as holiday presents, as there has been a significant increase among Generation Y, which is also the generation most likely to give flowers as holiday presents.

FLOWERS IN GIFT GIVING SITUATIONS

	Total		Males						Females						Gen Y's		Gen X's		Baby Boomers	
			Gen Y's		Gen X's		Baby Boomers		Gen Y's		Gen X's		Baby Boomers							
	2009	2016	2009	2016	2009	2016	2009	2016	2009	2016	2009	2016	2009	2016	2009	2016	2009	2016	2009	2016
Total Respondents	(1557)	(1557)	(259)	(261)	(261)	(254)	(257)	(265)	(260)	(261)	(251)	(256)	(269)	(260)	(519)	(522)	(512)	(510)	(526)	(525)
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
A Holiday Present For A Loved One																				
Gift Cards	30	31	21	23	28	29	26	24	32	37	41	38	30	34	27	30	34	34	28	29
Jewelry	33	27	40	20	32	31	35	36	35	24	25	25	30	28	38	22	29	28	32	32
Flowers or House-plants	15	21	17	32	15	18	18	23	12	17	14	16	16	18	15	25	15	17	17	21
Chocolate/Candy	8	10	10	11	11	8	11	9	6	12	4	10	6	9	8	11	7	9	8	9
Food/Food Basket	9	8	5	10	9	9	7	4	8	8	10	8	15	9	6	9	10	8	11	7
Wine/Alcohol	5	3	7	4	5	4	4	3	7	4	6	3	3	2	7	4	5	4	4	3
A Holiday Present For A Friend																				
Gift Cards	48	42	56	39	50	44	43	44	55	45	45	43	36	38	56	42	47	43	40	41
Food/Food Basket	13	14	6	7	12	17	18	18	12	10	16	16	16	19	9	8	14	17	17	18
Flowers or House-plants	10	13	7	16	6	7	11	11	8	17	12	15	19	14	8	16	9	11	15	12
Wine/Alcohol	15	13	15	19	18	18	18	16	13	8	14	8	13	12	14	13	16	13	16	14
Chocolate/Candy	10	12	12	13	11	11	8	11	8	12	10	13	9	12	10	13	11	12	9	11
Jewelry	4	5	3	7	2	3	2	1	5	8	4	5	7	5	4	7	3	4	4	3
A First Date																				
Flowers or House-plants	63	64	62	52	64	64	64	60	61	69	66	71	61	66	61	61	65	68	62	63
Chocolate/Candy	27	19	24	19	23	19	29	24	32	15	23	17	30	22	28	17	23	18	30	23
Wine/Alcohol	5	6	3	9	7	5	4	8	5	6	8	5	4	5	4	7	8	5	4	7
Gift Cards	2	4	3	9	2	4	1	3	1	5	1	3	2	3	2	7	1	4	2	3
Food/Food Basket	2	3	6	5	2	5	2	2	1	3	1	3	1	3	3	4	2	4	2	2
Jewelry	1	2	2	7	1	2	1	2	0	2	2	1	1	1	1	4	1	2	1	1

Base: Total Respondents

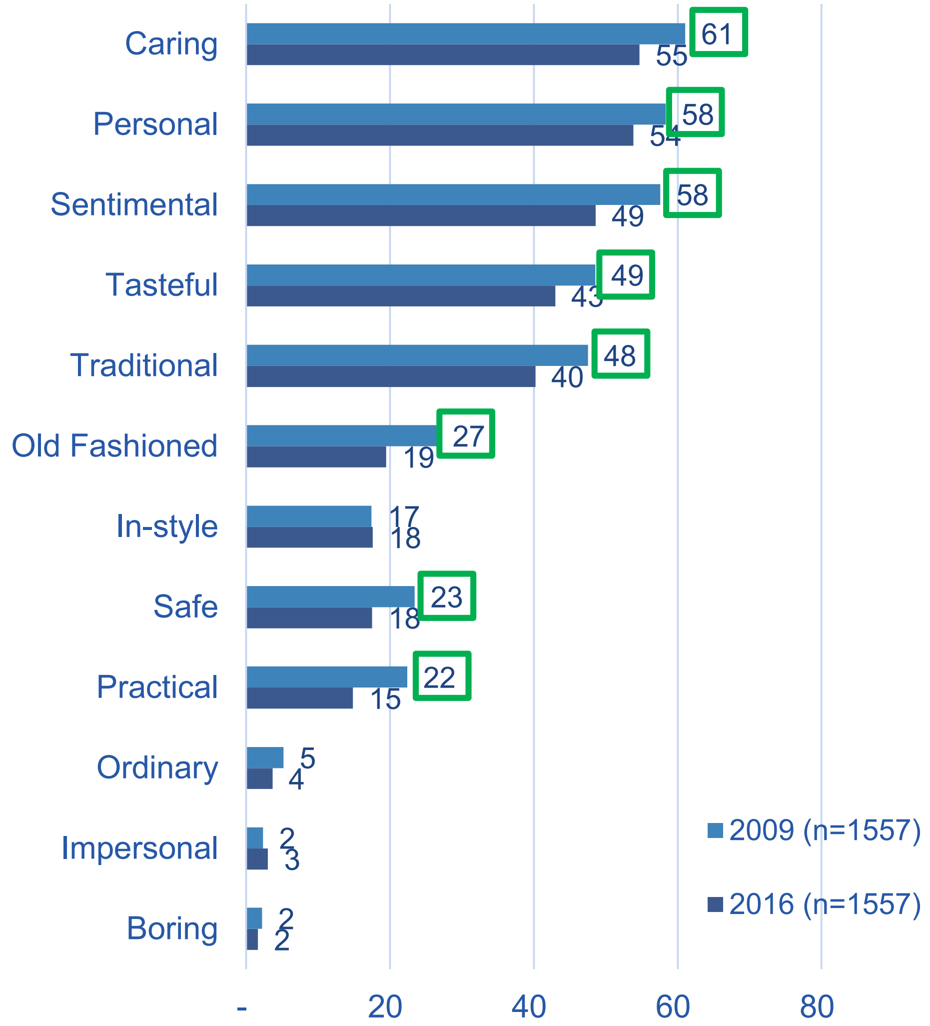
Q. 1. Thinking about the following situations below, which of the following do you think would be the best gift for that particular situation? (Choose One Answer For Each)

FLOWERS IN GIFT GIVING SITUATIONS

	Total		Males						Females						Gen Y's		Gen X's		Baby Boomers	
			Gen Y's		Gen X's		Baby Boomers		Gen Y's		Gen X's		Baby Boomers							
	2009	**2016**	**2009**	**2016**	**2009**	**2016**	**2009**	**2016**	**2009**	**2016**	**2009**	**2016**	**2009**	**2016**	**2009**	**2016**	**2009**	**2016**	**2009**	**2016**
Total Respondents	(1557)	(1557)	(259)	(261)	(261)	(254)	(257)	(265)	(260)	(261)	(251)	(256)	(269)	(260)	(519)	(522)	(512)	(510)	(526)	(525)
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
A House Warming Gift																				
Flowers or House-plants	44	39	27	29	41	31	39	32	48	44	55	50	56	46	37	36	48	40	47	39
Food/Food Basket	29	26	36	23	27	29	34	35	24	22	25	23	26	26	30	22	26	26	30	31
Wine/Alcohol	16	17	23	14	18	17	15	23	17	18	12	15	11	15	20	16	15	16	13	19
Gift Cards	9	11	12	17	10	14	11	6	9	11	8	9	5	10	10	14	9	11	8	8
Chocolate/Candy	2	5	2	12	3	6	1	4	2	4	0	2	2	2	2	8	2	4	2	3
Jewelry	0	2	1	6	1	3	-	1	1	1	0	2	-	0	1	3	1	3	-	1
An Anniversary																				
Flowers or House-plants	25	37	22	31	22	36	30	39	24	39	28	38	26	38	23	35	25	37	28	38
Jewelry	50	36	59	32	55	39	49	40	52	38	44	32	43	35	55	35	50	36	46	37
Gift Cards	8	9	5	12	6	9	11	9	6	7	8	9	12	10	5	10	7	9	11	9
Chocolate/Candy	5	8	5	11	5	8	4	7	8	8	4	7	4	6	7	10	4	8	4	6
Wine/Alcohol	8	6	7	6	9	5	5	3	9	5	10	9	11	8	8	5	10	7	8	6
Food/Food Basket	3	4	3	8	3	3	1	3	2	3	5	4	4	3	2	5	4	4	3	3
A Party Gift Or Host/ Hostess Gift																				
Wine/Alcohol	45	38	48	27	47	38	47	50	53	35	37	36	35	41	50	31	42	37	41	45
Flowers or House-plants	20	23	10	19	13	16	17	21	16	20	26	31	35	32	13	19	20	24	26	27
Food/Food Basket	21	19	22	17	19	21	25	16	20	27	22	19	21	15	21	22	21	20	23	15
Chocolate/Candy	7	9	9	14	8	10	4	6	5	7	8	9	6	8	7	10	8	10	5	7
Gift Cards	7	9	8	20	12	11	6	6	5	8	6	4	3	4	7	14	9	7	5	5
Jewelry	1	2	2	3	1	4	0	1	1	3	1	1	0	-	2	3	1	3	0	0

Base: Total Respondents
Q. 1. Thinking about the following situations below, which of the following do you think would be the best gift for that particular situation? (Choose One Answer For Each)

IMAGERY OF FLOWER GIFT-GIVING

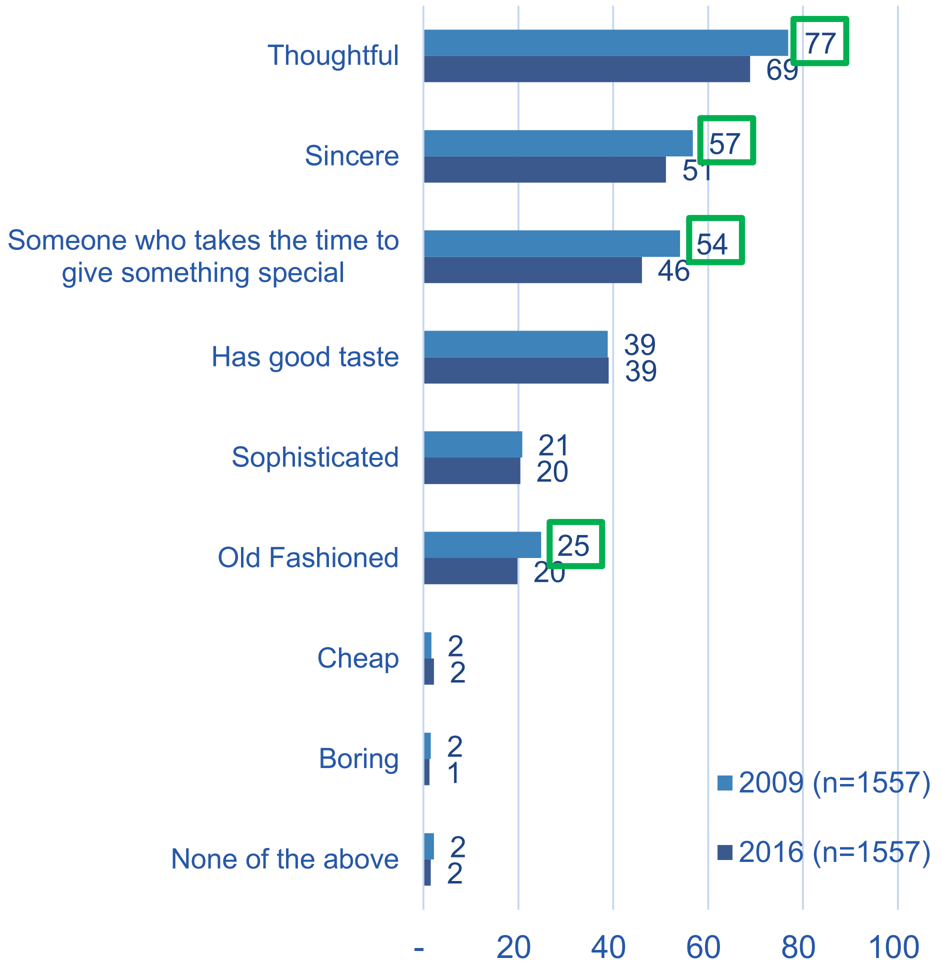


	Gen Y's		Gen X's		Baby Boomers	
	2009	2016	2009	2016	2009	2016
Total Respondents	(519)	(522)	(512)	(510)	(526)	(525)
	%	%	%	%	%	%
Caring	59	46	61	54	63	63
Personal	51	44	60	56	64	61
Sentimental	57	42	55	51	61	53
Tasteful	43	31	49	45	53	52
Traditional	49	38	48	38	46	45
Old Fashioned	26	21	27	15	27	22
In-style	17	17	17	19	19	16
Safe	23	16	23	17	25	19
Practical	22	14	21	16	24	15
Ordinary	8	5	5	4	3	2
Impersonal	4	4	2	3	2	2
Boring	3	2	2	2	2	1

The gift of flowers continues to be most widely viewed as caring, personal, and sentimental, although flowers are less widely viewed in these ways compared to 2009 (consistent with most adjectives). These associations are much stronger among Baby Boomers. Separately, flowers are twice as likely to be seen as traditional versus old-fashioned.

Base: Total Respondents
Q. 10. How would you describe giving flowers as a gift? (Check All That Apply)

PERCEPTION OF PEOPLE WHO GIVE FLOWERS AS A GIFT



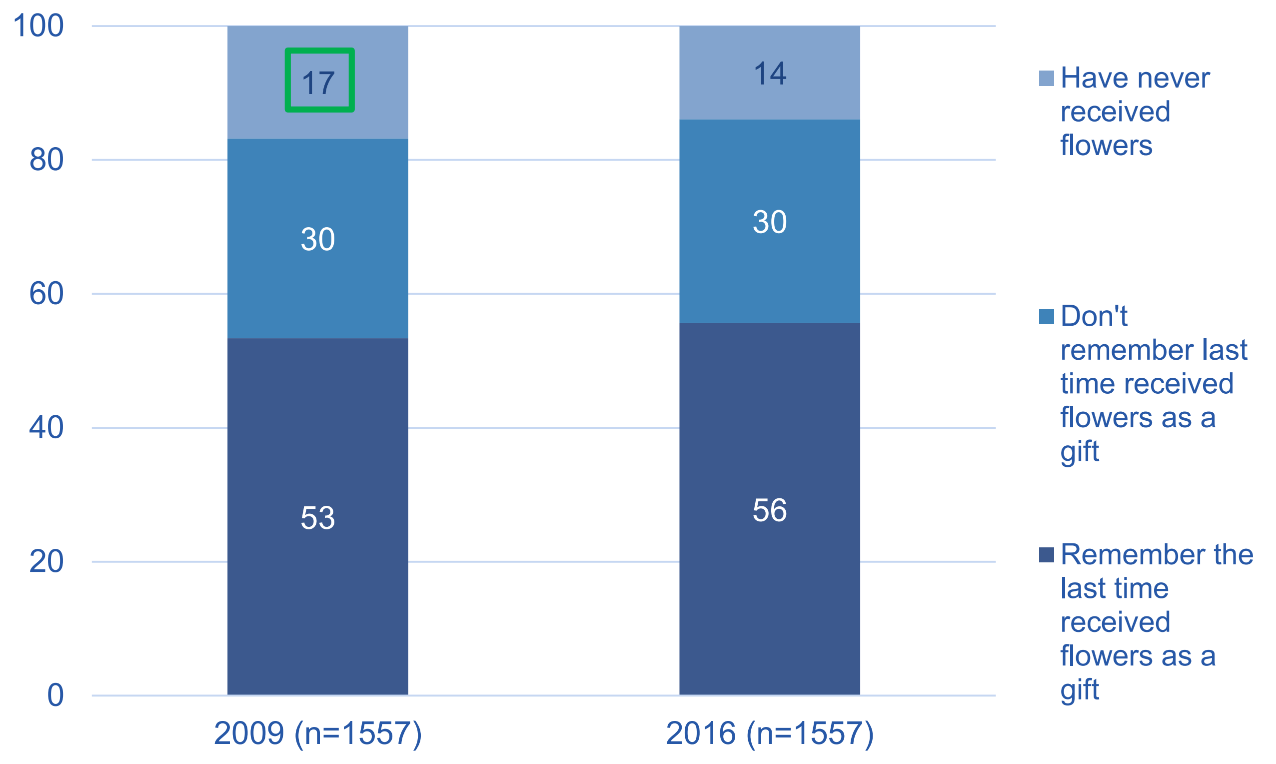
	Gen Y's		Gen X's		Baby Boomers	
	2009	**2016**	**2009**	**2016**	**2009**	**2016**
Total Respondents	(519)	(522)	(512)	(510)	(526)	(525)
	%	%	%	%	%	%
Thoughtful	74	59	78	70	79	78
Sincere	54	47	60	49	56	58
Someone who takes the time to give something special	50	36	55	47	58	55
Has good taste	38	34	36	39	43	45
Sophisticated	23	25	20	21	20	16
Old Fashioned	23	22	24	18	27	19
Cheap	2	3	1	2	1	1
Boring	3	2	1	1	1	1
None of the above	2	1	2	1	3	2

Seven in ten consumers find those who give flowers as a gift to be thoughtful and one-half view gift-givers as sincere. These associations have decreased among Generations Y and X while holding steady among Baby Boomers.

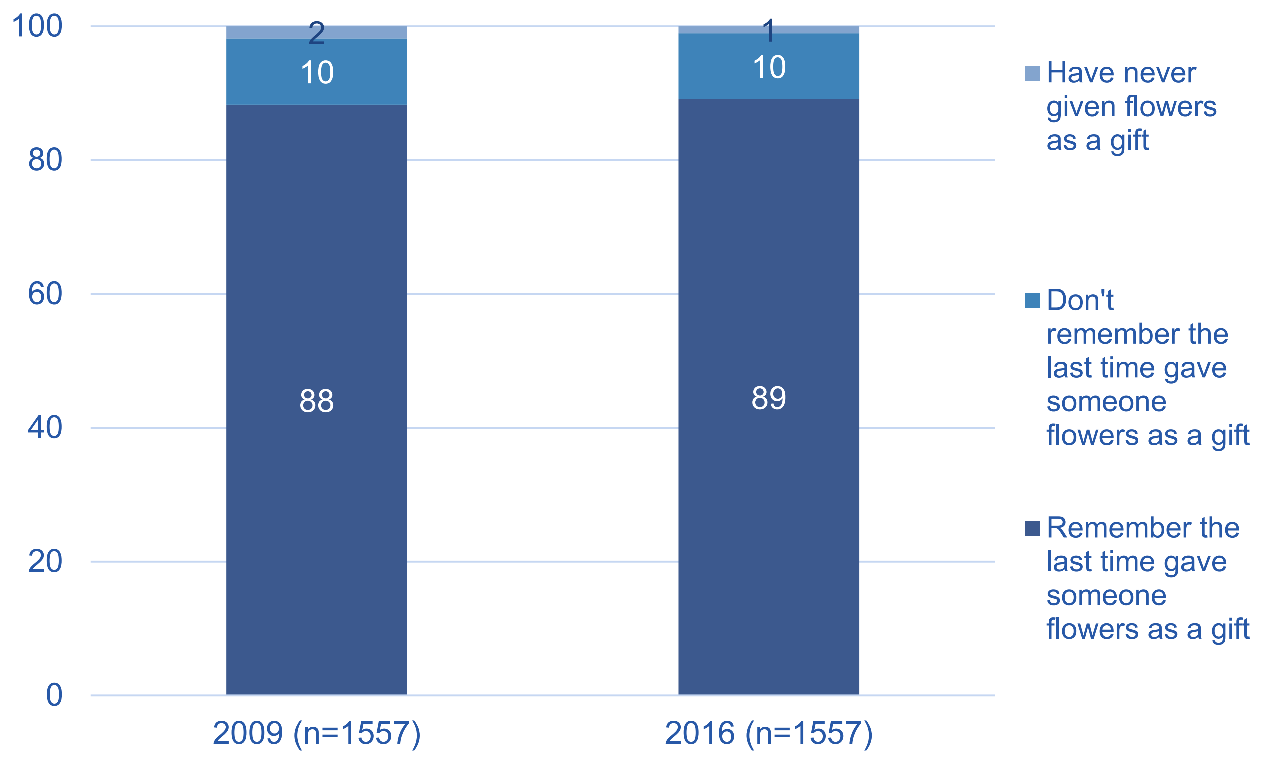
Base: Total Respondents
Q. 11. Which of the following describes a person who gives flowers as a gift? (Check All That Apply)

RECALL FLOWER GIFT-GIVING/RECEPTION

GIFT-RECEIVING



GIFT-GIVING



People are more likely to remember giving flowers than receiving, however both experiences are memorable. Nine in ten remember the last time they gave someone flowers and nearly three in five remember receiving flowers. Three in ten indicate they do not remember the last time they received flowers, which is consistent with findings from 2009. Only one percent of this audience has never given flowers as a gift.

Base: Total Respondents
Q. 14. Do you remember the last time you yourself received flowers as a gift? (Choose One Answer)
Q. 15. Do you remember the last time you gave someone flowers as a gift? (Choose One Answer)

RECALL FLOWER GIFT-GIVING/RECEPTION BY GENERATION & GENDER

	Gen Y's		Gen X's		Baby Boomers		Males		Females	
	2009	2016	2009	2016	2009	2016	2009	2016	2009	2016
Total Respondents	(519)	(522)	(512)	(510)	(526)	(525)	(777)	(780)	(780)	(777)
	%	%	%	%	%	%	%	%	%	%
Received										
Remember the last time received flowers as a gift	53	58	52	55	55	54	29	34	78	77
Do not remember the last time received flowers as a gift	25	28	32	33	32	30	38	40	21	21
Have never received flowers	22	14	16	12	12	16	32	26	1	2
Given										
Remember the last time gave flowers as a gift	85	86	87	90	92	91	89	88	88	90
Do not remember the last time gave flowers as a gift	11	12	11	8	7	9	9	10	11	10
Have never given flowers as a gift	4	1	1	1	1	1	2	2	1	1

Generation Y is significantly more likely to have received flowers compared to in the past and are the most likely of the three generations to remember the last time flowers were received.

Males are significantly more likely to have received flowers than in 2009. Findings were consistent among females with over three-quarters remembering the last time they received flowers as a gift.

Base: Total Respondents
Q. 14. Do you remember the last time you yourself received flowers as a gift? (Choose One Answer)
Q. 15. Do you remember the last time you gave someone flowers as a gift? (Choose One Answer)

RECALL FLOWER GIFT-GIVING/RECEPTION BY GENERATION & GENDER (NEVER RECEIVED/GIFTED REMOVED)

	Gen Y's		Gen X's		Baby Boomers		Males		Females	
	2009	**2016**	**2009**	**2016**	**2009**	**2016**	**2009**	**2016**	**2009**	**2016**
Total Ever Received Flowers	(405)	(450)	(431)	(451)	(461)	(439)	(525)	(578)	(771)	(762)
	%	%	%	%	%	%	%	%	%	%
Received										
Remember the last time received flowers as a gift	68	67	62	62	63	65	43	46	78	79
Do not remember the last time received flowers as a gift	32	33	38	38	37	35	57	54	22	21
Total Ever Given Flowers	*(500)*	*(515)*	*(506)*	*(503)*	*(523)*	*(522)*	*(758)*	*(767)*	*(771)*	*(773)*
Given										
Remember the last time gave flowers as a gift	89	88	89	91	93	91	91	90	89	90
Do not remember the last time gave flowers as a gift	11	12	11	9	7	9	9	10	11	10

When removing those who have never received or given the gift of flowers, two-thirds of all generations remember the last time they received flowers, with females far more likely to remember the last time they were received.

Approximately nine in ten of all segments remember the last time they gave flowers as a gift.

Q. 14. Do you remember the last time you yourself received flowers as a gift? (Choose One Answer)
Q. 15. Do you remember the last time you gave someone flowers as a gift? (Choose One Answer)

RECIPIENTS OF FLOWERS

	Total		Males						Females					
			Gen Y's		Gen X's		Baby Boomers		Gen Y's		Gen X's		Baby Boomers	
	2009	2016	2009	2016	2009	2016	2009	2016	2009	2016	2009	2016	2009	2016
Total Purchased Flowers For Pick-Me-Up/Traditional Occasion Gift	(1064)	(1032)	(186)	(180)	(189)	(189)	(189)	(187)	(168)	(166)	(153)	(153)	(179)	(157)
	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Spouse/ Partner/ Significant Other	47	41	68	48	69	61	77	71	19	19	25	21	14	11
Parent(s)	47	37	40	34	39	29	34	21	68	65	54	55	53	26
Friend(s)	36	28	20	20	19	15	26	16	45	34	55	46	59	44
Relative(s) that is not in your immediate family	28	17	19	6	17	14	18	13	36	24	40	21	39	25
Child(ren)	14	14	4	9	7	11	15	11	10	10	24	17	25	29
Someone you are romantically attracted to	20	11	38	17	25	14	20	15	14	8	10	6	7	2
Host of a party or an event	12	10	5	7	7	3	12	10	14	10	18	18	16	17
Sibling(s)	11	7	6	5	5	2	7	8	11	11	16	8	19	12
Colleague(s)	7	5	6	7	2	3	5	1	5	5	13	10	11	4
Client(s)	3	3	3	6	2	4	2	1	1	8	3	1	4	1
Associate(s)	6	3	5	6	4	3	6	1	4	4	6	2	12	3
Other	3	2	1	-	2	-	3	4	4	-	4	3	6	5

Flower recipients continue to widely differ by both gender and generation. Males are most likely to purchase flowers for a significant other, someone to whom they are romantically attracted, and parents. Meanwhile females are most likely to purchase for parents, friends, and other relatives. Female Baby Boomers also purchase for children. There was an overall decline in the percentages for each recipient, however the findings were extremely similar with 2009.

Base: Total Purchased Flowers In Past Year For Pick-Me-Up or Traditional Occasion Gift
Q. 16. Thinking about the past year, for whom have you purchased flowers? (Check All That Apply)

FLOWER GIFT-GIVING OCCASIONS

	Total		Gen Y's		Gen X's		Baby Boomers	
	2009	2016	2009	2016	2009	2016	2009	2016
Total Purchased Flowers For Pick-Me-Up/Traditional Occasion Gift	(1064)	(1032)	(354)	(346)	(342)	(342)	(368)	(344)
	%	%	%	%	%	%	%	%
"Just because"	61	47	60	40	60	54	64	47
Birthdays	56	46	55	37	55	47	59	55
Holidays	50	40	43	39	52	37	53	45
Anniversaries	44	38	43	33	42	41	48	40
Appreciation/ Thank you	37	31	36	30	37	33	39	29
Funerals	39	23	27	17	38	23	50	30
Illness/ Sickness	35	22	26	13	33	24	47	28
Sympathy	29	19	25	14	26	19	35	24
House warming	23	16	17	17	21	15	29	14
Party gift or host/ Hostess gift	17	15	14	16	16	11	21	17
Dates	18	12	22	17	17	11	13	7
New baby	19	10	19	10	19	10	20	10
Graduations	12	9	14	13	10	10	12	5
Start A New Job & Promotions (net)	7	4	7	7	7	3	6	3
Start of a new job	5	3	5	4	4	2	5	2
Promotions	4	3	5	5	5	2	3	2
Other	2	1	2	1	2	1	1	1

"Just because" and birthdays are the most common situations for having purchased gifts for someone else, closely followed by holidays and anniversaries. "Just because" is most common among Generation X, while purchases for birthdays and holidays is most prevalent among Baby Boomers. One in six adults from Generation Y purchase flowers for dates.

Base: Total Purchased Flowers In Past Year For Pick-Me-Up or Traditional Occasion Gift
Q. 17. For what situation(s) have you personally purchased flowers as a gift for someone? (Check All That Apply)

DETAILED FINDINGS: FLOWER PURCHASE & USAGE BEHAVIOR

MOST RECENT FLOWER PURCHASE

	Total		Gen Y's		Gen X's		Baby Boomers	
	2009	2016	2009	2016	2009	2016	2009	2016
Total Respondents	(1557)	(1557)	(519)	(522)	(512)	(510)	(526)	(525)
	%	%	%	%	%	%	%	%
In The Past Year (net)	89	90	87	93	89	90	92	89
Within the last month	22	33	22	42	20	31	25	25
Within the last 2 to 3 months	22	24	21	23	20	26	24	23
Within the last 4 to 6 months	20	16	20	16	23	16	17	17
Within the last 7 to 9 months	11	8	12	5	10	7	12	11
Within the last 10 to 12 months	14	10	12	8	16	9	15	13
Longer than 1 year	10	8	11	5	11	8	7	11
Never	1	1	3	2	0	2	1	1
Mean (months)	*5.4*	*4.4*	*5.5*	*3.6*	*5.7*	*4.4*	*5.1*	*5.3*
Median (months)	*3.0*	*2.7*	*3.0*	*2.3*	*3.0*	*2.7*	*3.0*	*4.2*

Among the flower purchasing public, one-third of consumers have made a purchase within the last month, representing a significant increase over 2009 findings, and driven by more than two-fifths of Generation Y who recently purchased flowers.

Base: Total Respondents
Q. F. When did you last purchase flowers for either you or someone else? (Choose One Answer)

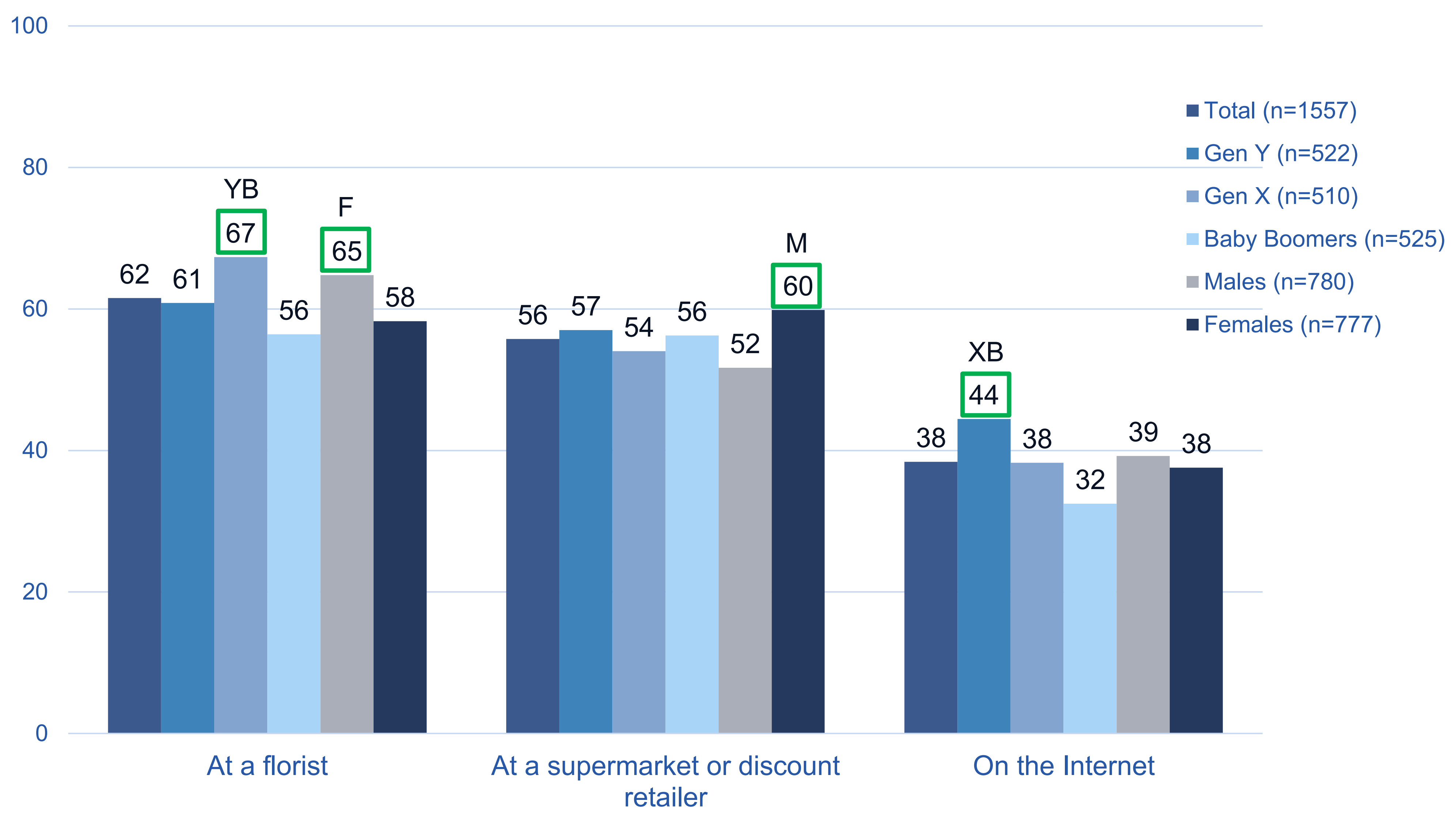
FLOWER CHANNEL CONSIDERATION
(FAVORITE WAY/ONE OF MY FAVORITE WAYS TO PURCHASE)

More than three in five consumers indicate shopping at a florist is either their favorite or one of their favorite ways of purchasing flowers. This includes two-thirds of Generation X, a significantly higher percentage when compared to Generation Y and Baby Boomers.

Further, florists are the mostly widely popular way of purchasing flowers, followed by supermarkets/discount retailers.

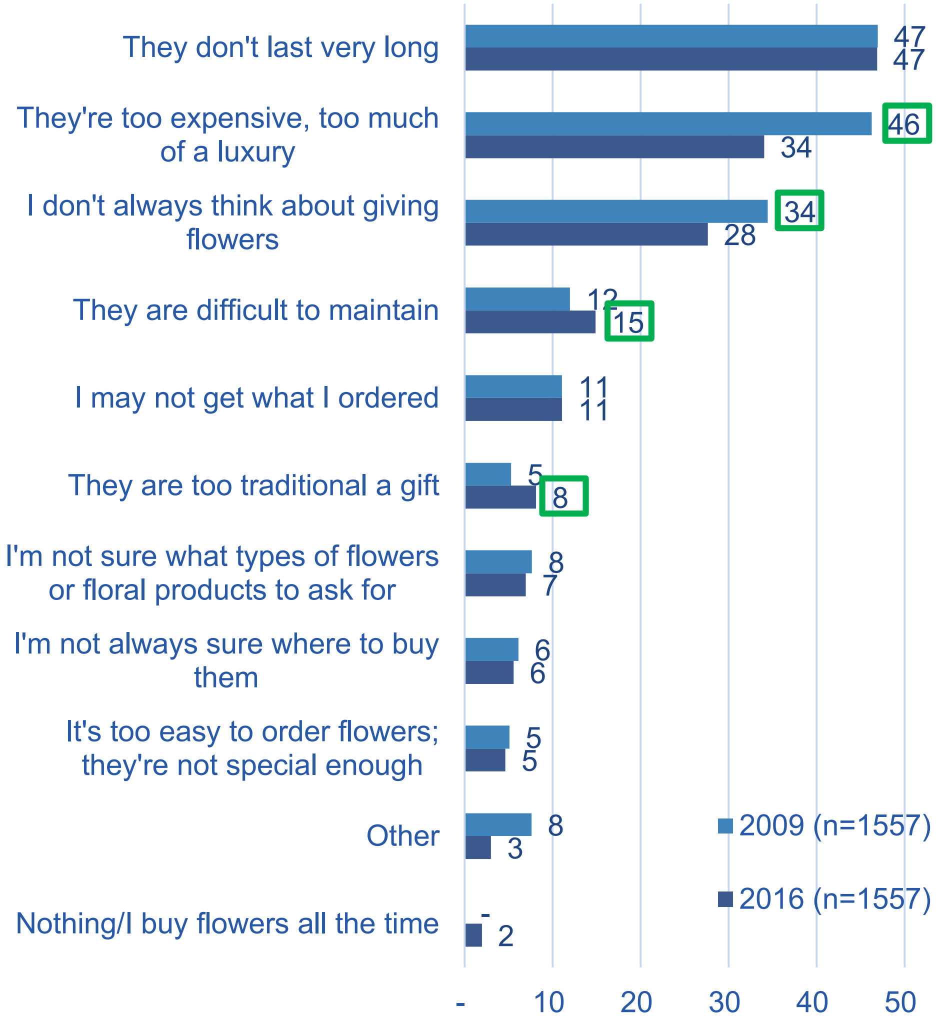
Generation Y is significantly more likely than other generations to have a preference of purchasing flowers over the Internet.

Males are significantly more likely to prefer purchasing flowers at a florist while females prefer supermarkets/discount retailers.



Base: Total Respondents (2016 Wave)
Q. 21a. Which of the following best describes how likely you would be to consider each of the following methods of purchasing flowers? (Choose One Answer For Each)

FLORIST PURCHASE BARRIERS

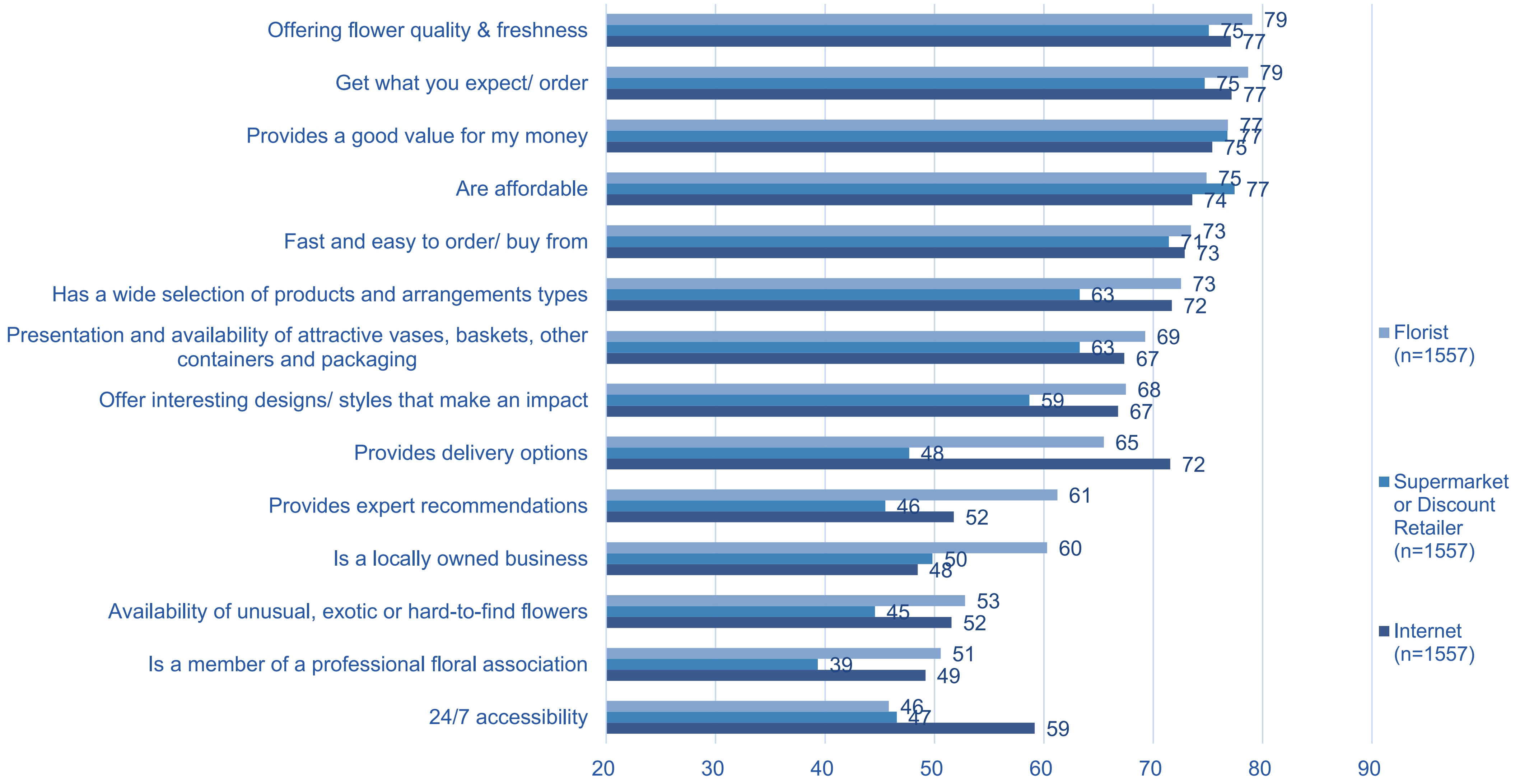


	Gen Y's		Gen X's		Baby Boomers	
	2009	2016	2009	2016	2009	2016
Total Respondents	(519)	(522)	(512)	(510)	(526)	(525)
	%	%	%	%	%	%
They don't last very long	47	42	48	45	46	54
They're too expensive, too much of a luxury	39	27	47	35	53	40
I don't always think about giving flowers	35	25	34	28	34	31
They are difficult to maintain	14	17	11	15	10	13
I may not get what I ordered	8	14	9	8	15	11
They are too traditional a gift	7	15	5	6	4	4
I'm not sure what types of flowers or floral products to ask for	10	8	7	6	6	6
I'm not always sure where to buy them	8	9	6	5	4	3
It's too easy to order flowers; they're not special enough	9	6	4	6	3	2
Other	7	2	7	2	9	5
Nothing/I buy flowers all the time	-	2	-	1	-	3

The perceived short lifespan of flowers remains the primary barrier to purchasing them more often. The expense and not being top-of-mind are still the second and third largest barriers, though are cited by a significantly lower percentage of consumers in comparison to 2009. There has been a significant increase in the percentage of Generation Y who cite being too traditional a gift and not getting what they ordered as being barriers (the latter possibly referring to online purchases).

Base: Total Respondents
Q. 21. What would you say keeps you from purchasing flowers more often? (Check All That Apply)

LEVEL OF IMPORTANCE OF CHANNEL BENEFITS



	Difference (%) ***(Florist minus Supermarket or Discount Retailer)***	***Difference (%)*** ***(Florist minus Internet)***
Offering flower quality & freshness	**4**	**2**
Get what you expect/ order	**4**	**2**
Provides a good value for my money	**E**	**1**
Are affordable	**-3**	**1**
Fast and easy to order/ buy from	**2**	**1**
Has a wide selection of products and arrangements types	**9**	**1**
Presentation and availability of attractive vases, baskets, other containers and packaging	**6**	**2**
Offer interesting designs/ styles that make an impact	**9**	**1**
Provides delivery options	**18**	**-6**
Provides expert recommendations	**16**	**9**
Is a locally owned business	**10**	**12**
Availability of unusual, exotic or hard-to-find flowers	**8**	**1**
Is a member of a professional floral association	**11**	**1**
24/7 accessibility	**-1**	**-13**

Offering flower quality & freshness, meeting order expectations, value for the money, affordability, being fast and easy to order from, and having a wide selection of products/arrangement types are the most widely important attributes when considering purchasing flowers at a florist. Consumers place less importance on several variables when purchasing at supermarkets while 24/7 accessibility is far more important online when compared to other channels.

Base: Total Respondents (2016 Wave)

Q. 20a-c. Below are a few attributes you may consider when purchasing flowers for you or someone else [**at a florist/ at a supermarket or discount retailer/ Internet**]. Using a scale of 1 to 10 where "1" means the attribute is "Not At All Important" and "10" means it is "Extremely Important" please indicate how important each one is to you. (Choose One Answer For Each)

PURCHASE IMPORTANCE RATINGS: FLORIST *(RATED 8, 9, OR 10)*

	Total		Gen Y's		Gen X's		Baby Boomers	
	2009	2016	2009	2016	2009	2016	2009	2016
Total Respondents	(1557)	(1557)	(519)	(522)	(512)	(510)	(526)	(525)
	%	%	%	%	%	%	%	%
Offering flower quality & freshness	76	79	70	76	77	79	81	82
Get what you expect/ order	76	79	68	74	77	79	81	83
Provides a good value for my money	71	77	66	75	74	79	74	77
Are affordable	70	75	66	72	72	76	72	76
Fast and easy to order/ buy from	69	73	63	71	70	75	73	74
Has a wide selection of products and arrangements types	68	73	63	67	69	77	71	73
Presentation and availability of attractive vases, baskets, other containers and packaging	65	69	58	67	69	74	68	67
Offer interesting designs/ styles that make an impact	62	68	55	66	64	71	66	66
Provides delivery options	58	65	50	64	62	69	64	63
Provides expert recommendations	58	61	51	62	60	63	64	58
Is a locally owned business	na	60	na	59	na	63	na	59
Availability of unusual, exotic or hard-to-find flowers	47	53	48	61	48	54	45	43
Is a member of a professional floral association	na	51	na	55	na	50	na	47
24/7 accessibility	37	46	38	55	38	48	36	34

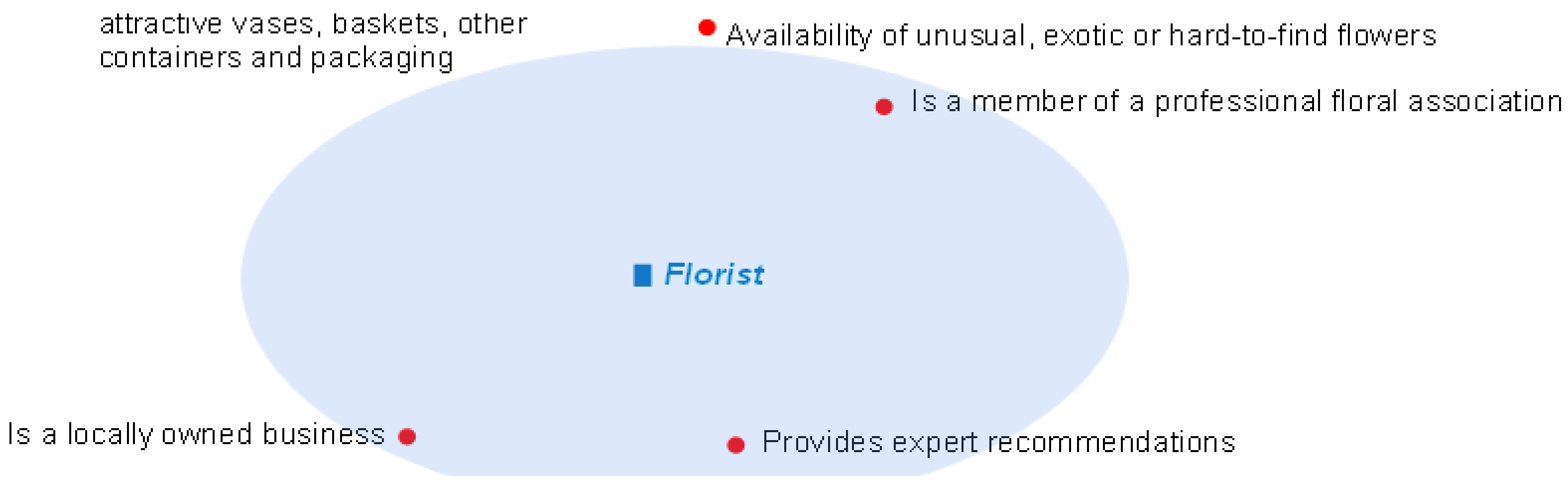
Many factors in the florist purchase decision have increased in importance over time. Availability of unusual, exotic, or hard-to-find flowers and 24/7 accessibility are most important to Generation X, while Generation X most values a wide selection.

Base: Total Respondents
Q. 20a. Below are a few attributes you may consider when purchasing flowers for you or someone else **at a florist**. Using a scale of 1 to 10 where "1" means the attribute is "Not At All Important" and "10" means it is "Extremely Important" please indicate how important each one is to you. (Choose One Answer For Each)

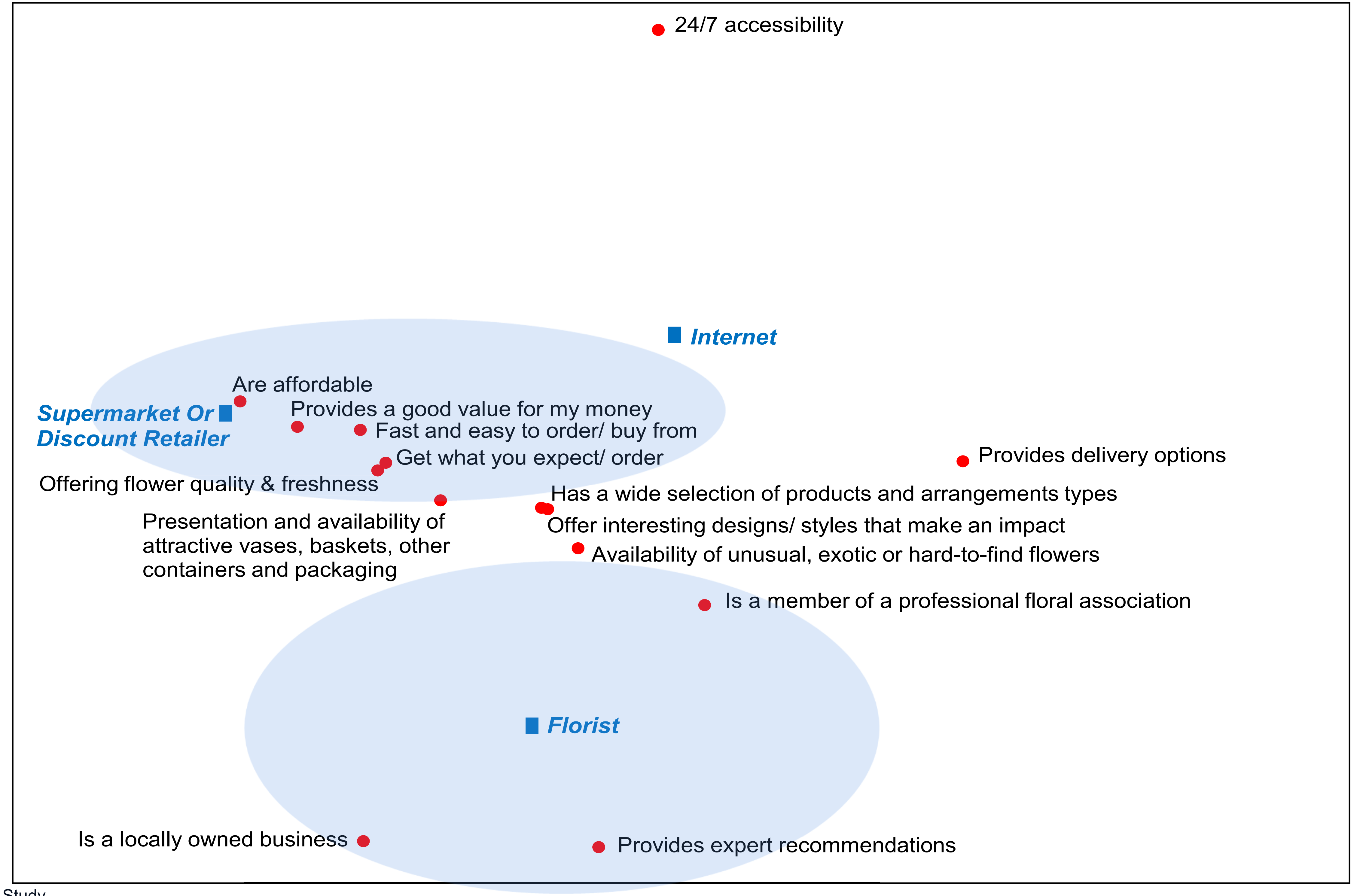
CORRESPONDENCE MAP

Correspondence analysis is a mapping technique in which the results of cross tabulations are plotted. It is used to make complex data easier to absorb and understand. The purpose of correspondence analysis is to determine which attributes are most differentiating for a specific brand and which attributes would need to be changed in order to move brand perceptions closer or farther from another brand. Brands and attributes that are rated similarly are placed close to each other on the map, while those that are rated differently will appear in a different area of the map. As a result, map areas correspond to the brands and attributes with which they are most closely associated – please note association doesn't imply importance or positive/negative association.

- The results of the analysis find **Florists** are most closely associated with:
  - Providing expert recommendations
  - Being locally owned
  - Being a member of a professional floral association
- The **Internet** is most closely associated with:
  - 24/7 accessibility
  - Providing delivery options
- **Supermarket/discount retailers** are most closely associated with:
  - Being affordable
  - Providing a good value for the money
  - Being fast and easy to order/buy from



CORRESPONDENCE MAP: PURCHASE IMPORTANCE



REGRESSION ANALYSIS

Regression analysis is a process which identifies the relationship between two variables.

For this research, regression was used to determine <u>which attributes most drive purchase consideration of different channels</u>.

On the following slides is an examination and comparison of the following:

- What consumers tell us is important when considering where to purchase flowers (Stated Importance)
- What is subconsciously important (also known as “System 1 Behavior” and identified through Regression Analysis)
- Attributes which are important and drive purchase decisions, however are not stated (comparison of two analyses)

REGRESSION ANALYSIS: FLORISTS

	Rank Order	Stated Importance
Is a locally owned business	1	11
Provides expert recommendations	2	10
Has a wide selection of products and arrangements types	3	6
Get what you expect/ order	4	2
Provides delivery options	5	9
24/7 accessibility	6	14
Offer interesting designs/ styles that make an impact	7	8
Availability of unusual, exotic or hard-to-find flowers	8	12
Is a member of a professional floral association	9	13
Offering flower quality & freshness	10	1
Fast and easy to order/ buy from	11	5
Are affordable	12	4
Presentation and availability of attractive vases, baskets, other containers and packaging	13	7
Provides a good value for my money	14	3

Despite receiving among the lowest stated importance ratings, being locally owned and providing expert recommendations were the primary drivers of florists being among consumers' favorite places to shop for flowers.

Having a wide selection of products and arrangement types, providing delivery options, and having 24/7 accessibility were also drivers of consideration/favorability.

Value/affordability and presentation/availability of attractive vases, baskets, other containers, and packaging were among the least important drivers.

STATED IMPORTANCE VS. REGRESSION ANALYSIS: FLORISTS

The results of the Regression Analysis for Florists are compared to what consumers state is important to them and plotted on a quadrant map. From this map, three important groupings of attributes are defined as follows.

Critically Important

(Strong Driver / High Stated Importance)

- **Attributes which are strong drivers of channel consideration and where the attributes are above average in stated importance. Reinforcing these attributes should drive consideration.**
  - ✓ Get what you expect / order
  - ✓ Has a wide selection of products and arrangement types

Notes

- Meeting customer expectations and offering a wide product selection are the key drivers of florist consideration

Hidden Opportunities

(High Derived / Low Stated Importance)

- **Attributes which are strong drivers of channel consideration and where the attributes are below average in stated importance. These represent opportunities in strengthening consideration.**
  - ✓ Provides delivery options
  - ✓ Provides expert recommendations
  - ✓ Is a locally owned business
  - ✓ 24/7 accessibility

Notes

- Local can be leveraged as an opportunity
- The role of florist as expert is understood in consumer minds though drives consideration
- Rivaling online is important (delivery & accessibility)

Cost of Entry

(Low Derived / High Stated Importance)

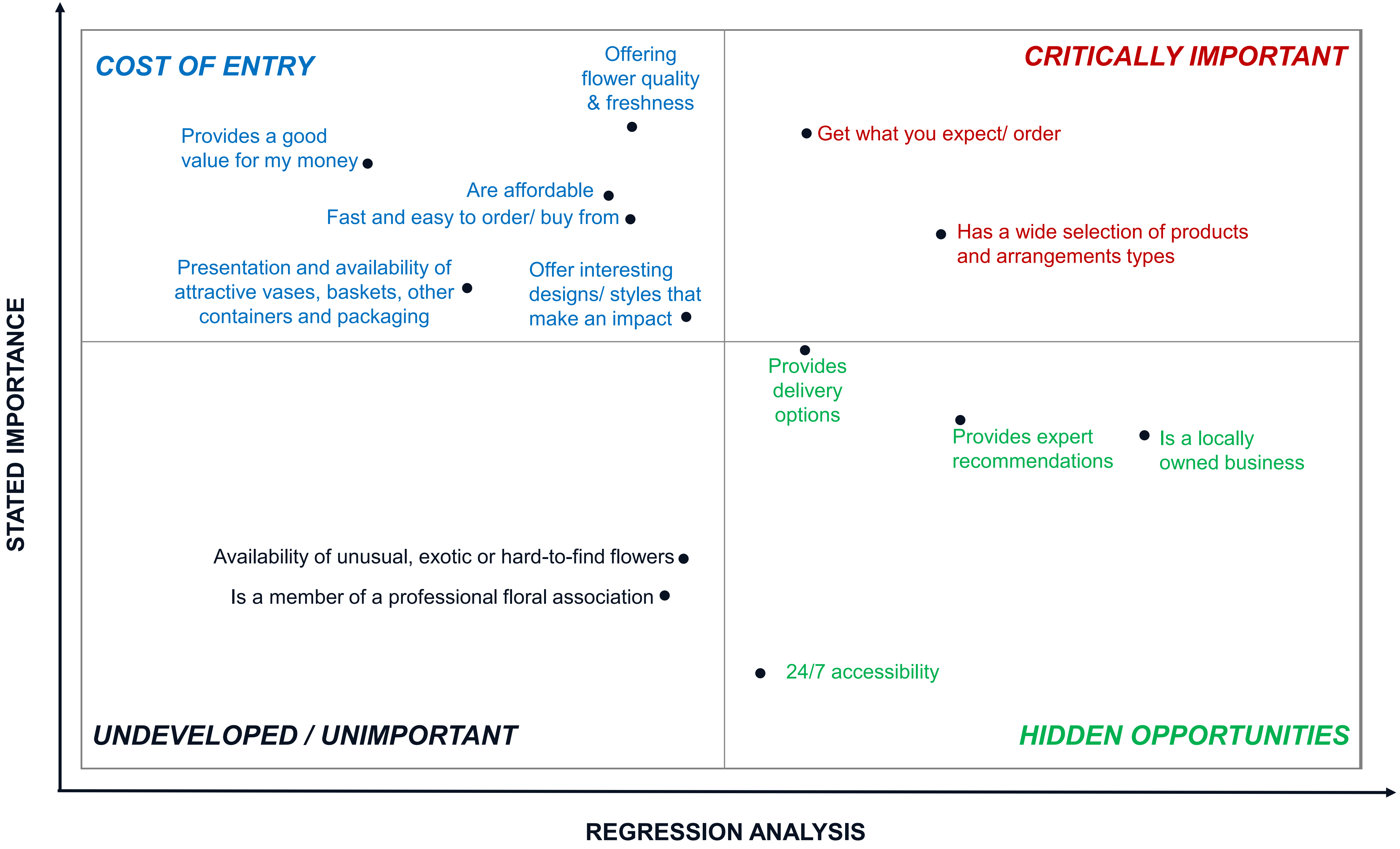
- **Attributes which are weaker drivers of channel consideration and where the attributes are above average in stated importance. These should be maintained.**
  - ✓ Offering flower quality & freshness
  - ✓ Provides a good value for my money
  - ✓ Are affordable
  - ✓ Fast and easy to order/ buy from
  - ✓ Offering interesting designs/styles that make an impact
  - ✓ Presentation and availability of attractive vases, baskets, other containers and packaging

Notes

- Value, quality, and attractive options are important though don't generate loyalty.

Being a member of a professional floral association was not viewed as a driver. This sometimes occurs when all brands within a channel are equally seen a performing on a factor, which could be the case for this attribute.

QUADRANT MAP: STATED VS REGRESSION - FLORISTS



REGRESSION ANALYSIS: SUPERMARKET / DISCOUNT RETAILERS

	Rank Order	Stated Importance
Availability of unusual, exotic or hard-to-find flowers	1	13
Has a wide selection of products and arrangements types	2	7
Fast and easy to order/ buy from	3	5
Offering flower quality & freshness	4	3
Provides a good value for my money	5	2
Is a member of a professional floral association	6	14
Is a locally owned business	7	9
Are affordable	8	1
Offer interesting designs/ styles that make an impact	9	8
Provides expert recommendations	10	12
24/7 accessibility	11	11
Presentation and availability of attractive vases, baskets, other containers and packaging	12	6
Get what you expect/ order	13	4
Provides delivery options	14	10

Interestingly, the availability of unusual, exotic, or hard-to-find flowers most builds loyalty/consideration in the supermarket/discount channel, closely followed by having a wide selection of products and arrangement types.

Being fast and easy to order/buy from, offering flower quality and freshness, providing good value for the money and being a member of a professional floral association were also drivers of consideration/favorability.

Providing delivery options is the least important driver.

STATED IMPORTANCE VS. REGRESSION ANALYSIS: SUPERMARKET/DISCOUNT RETAILERS

The results of the Regression Analysis for supermarkets/discount retailers are compared to what consumers state is important to them and plotted on a quadrant map. From this map, three important groupings of attributes are defined as follows.

Critically Important

(Strong Driver / High Stated Importance)

- **Attributes which are strong drivers of channel consideration and where the attributes are above average in stated importance. Reinforcing these attributes should drive consideration.**
  - ✓ Has a wide selection of products and arrangement types
  - ✓ Fast and easy to order/ buy from
  - ✓ Offering flower quality & freshness
  - ✓ Provides a good value for my money

Notes

- Selection, speed, quality, and value are the primary drivers of supermarket/discount retailer consideration

Hidden Opportunities

(High Derived / Low Stated Importance)

- **Attributes which are strong drivers of channel consideration and where the attributes are below average in stated importance. These represent opportunities in strengthening consideration.**
  - ✓ Availability of unusual, exotic or hard-to-find flowers
  - ✓ Is a member of a professional floral association

Notes

- Being a member of a professional floral association can positively differentiate supermarkets from others in the channel
- Beyond a wide product selection, having exceptional product can drive loyalty

Cost of Entry

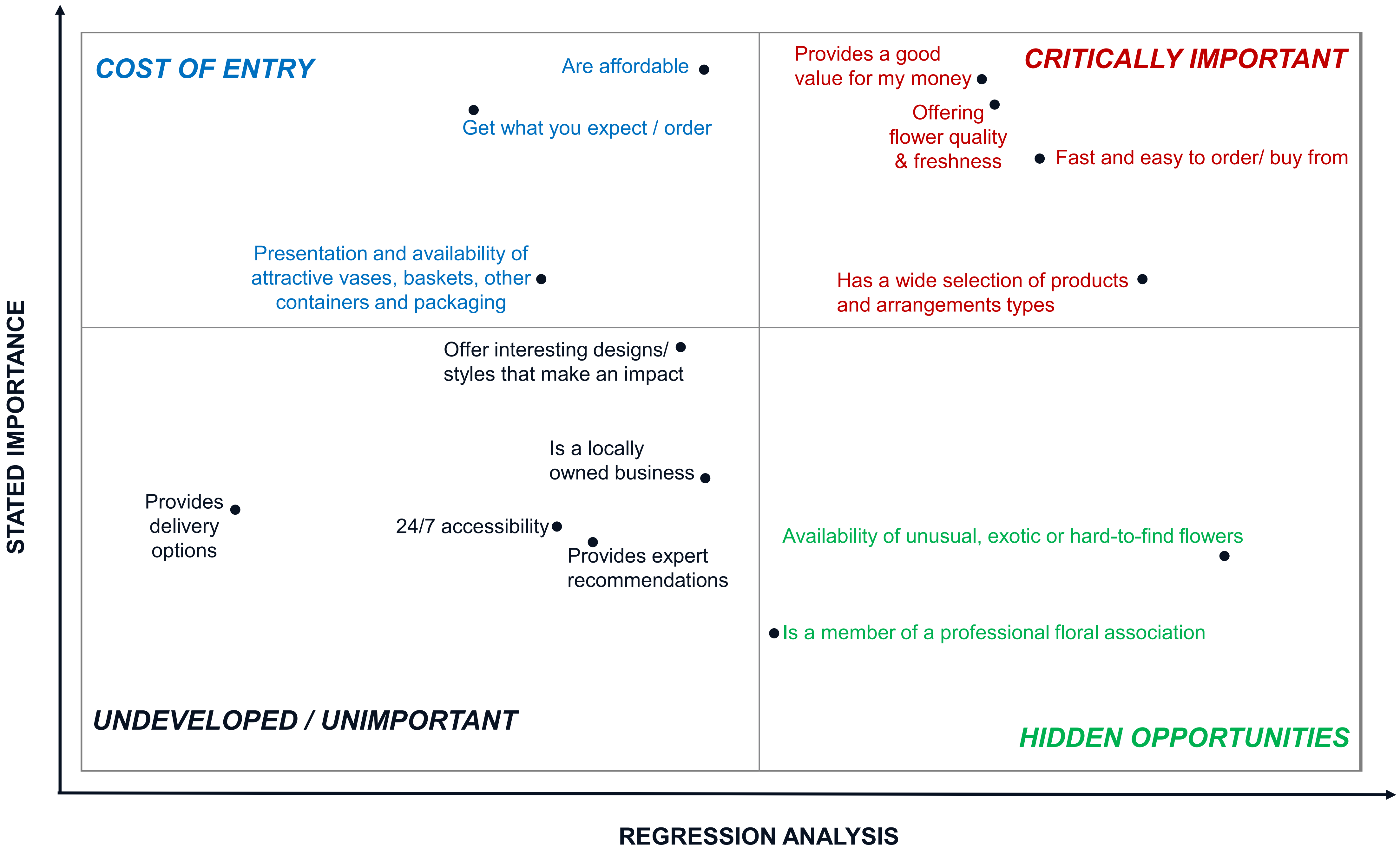
(Low Derived / High Stated Importance)

- **Attributes which are weaker drivers of channel consideration and where the attributes are above average in stated importance. These should be maintained.**
  - ✓ Are affordable
  - ✓ Presentation and availability of attractive vases, baskets, other containers and packaging
  - ✓ Get what you expect / order

Notes

- Affordability, meeting customer expectations, and having/presenting attractive options are necessary to thrive in this channel.

QUADRANT MAP: STATED VS REGRESSION – SUPERMARKET/DISCOUNT



REGRESSION ANALYSIS: INTERNET

	Rank Order	Stated Importance
24/7 accessibility	1	10
Is a member of a professional floral association	2	13
Offer interesting designs/ styles that make an impact	3	9
Fast and easy to order/ buy from	4	5
Has a wide selection of products and arrangements types	5	6
Provides delivery options	6	7
Presentation and availability of attractive vases, baskets, other containers and packaging	7	8
Are affordable	8	4
Is a locally owned business	9	14
Provides expert recommendations	10	11
Availability of unusual, exotic or hard-to-find flowers	11	12
Get what you expect/ order	12	1
Provides a good value for my money	13	3
Offering flower quality & freshness	14	2

Convenience, particularly 24/7 accessibility, being fast and easy to order from, and having delivery items, is a key driver when buying flowers on the Internet.

Also a key driver is being a member of a professional floral association while a wide selection and affordability are also important.

Note affordability is far more important than perceived value when ordering online, while flower quality and freshness least impacts consideration.

STATED IMPORTANCE VS. REGRESSION ANALYSIS: INTERNET

The results of the Regression Analysis for the Internet are compared to what consumers state is important to them and plotted on a quadrant map. From this map, three important groupings of attributes are defined as follows.

Critically Important

(Strong Driver / High Stated Importance)

- **Attributes which are strong drivers of channel consideration and where the attributes are above average in stated importance. Reinforcing these attributes should drive consideration.**
  - ✓ Has a wide selection of products and arrangement types
  - ✓ Fast and easy to order/ buy from
  - ✓ Are affordable
  - ✓ Presentation and availability of attractive vases, baskets, other containers and packaging
  - ✓ Provides delivery options
  - ✓ Offer interesting designs/styles that make an impact

Notes

- Having interesting and unique options is as important as a wide selection
- Affordability and easy ordering options are very important

Hidden Opportunities

(High Derived / Low Stated Importance)

- **Attributes which are strong drivers of channel consideration and where the attributes are below average in stated importance. These represent opportunities in strengthening consideration.**
  - ✓ 24/7 availability
  - ✓ Is a member of a professional floral association

Notes

- Being a member of a professional floral association can positively differentiate web retailers from other online options

Cost of Entry

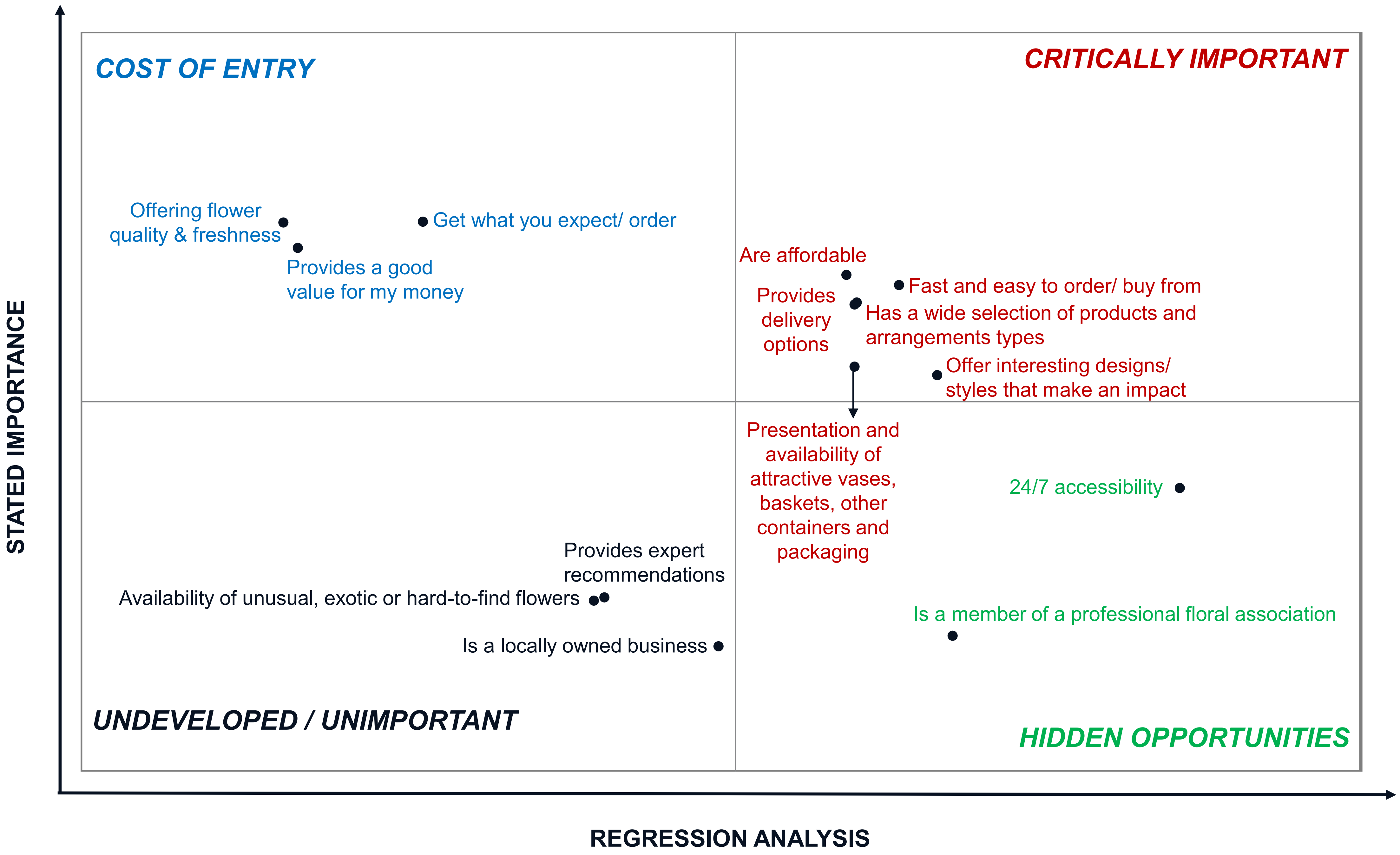
(Low Derived / High Stated Importance)

- **Attributes which are weaker drivers of channel consideration and where the attributes are above average in stated importance. These should be maintained.**
  - ✓ Get what you expect / order
  - ✓ Provides a good value for my money
  - ✓ Offering flower quality & freshness

Notes

- Value, meeting customer expectations, and quality/freshness are “table stakes” which are necessary though will not differentiate.

QUADRANT MAP: STATED VS REGRESSION – INTERNET



SUMMARY: CRITICALLY IMPORTANT DRIVERS BY CHANNEL

FLORISTS

- ✓ Has a wide selection of products and arrangement types
- ✓ Get what you expect / order

SUPERMARKET / DISCOUNT RETAILERS

- ✓ Has a wide selection of products and arrangement types
- ✓ Fast and easy to order/ buy from
- ✓ Offering flower quality & freshness
- ✓ Provides a good value for my money

INTERNET

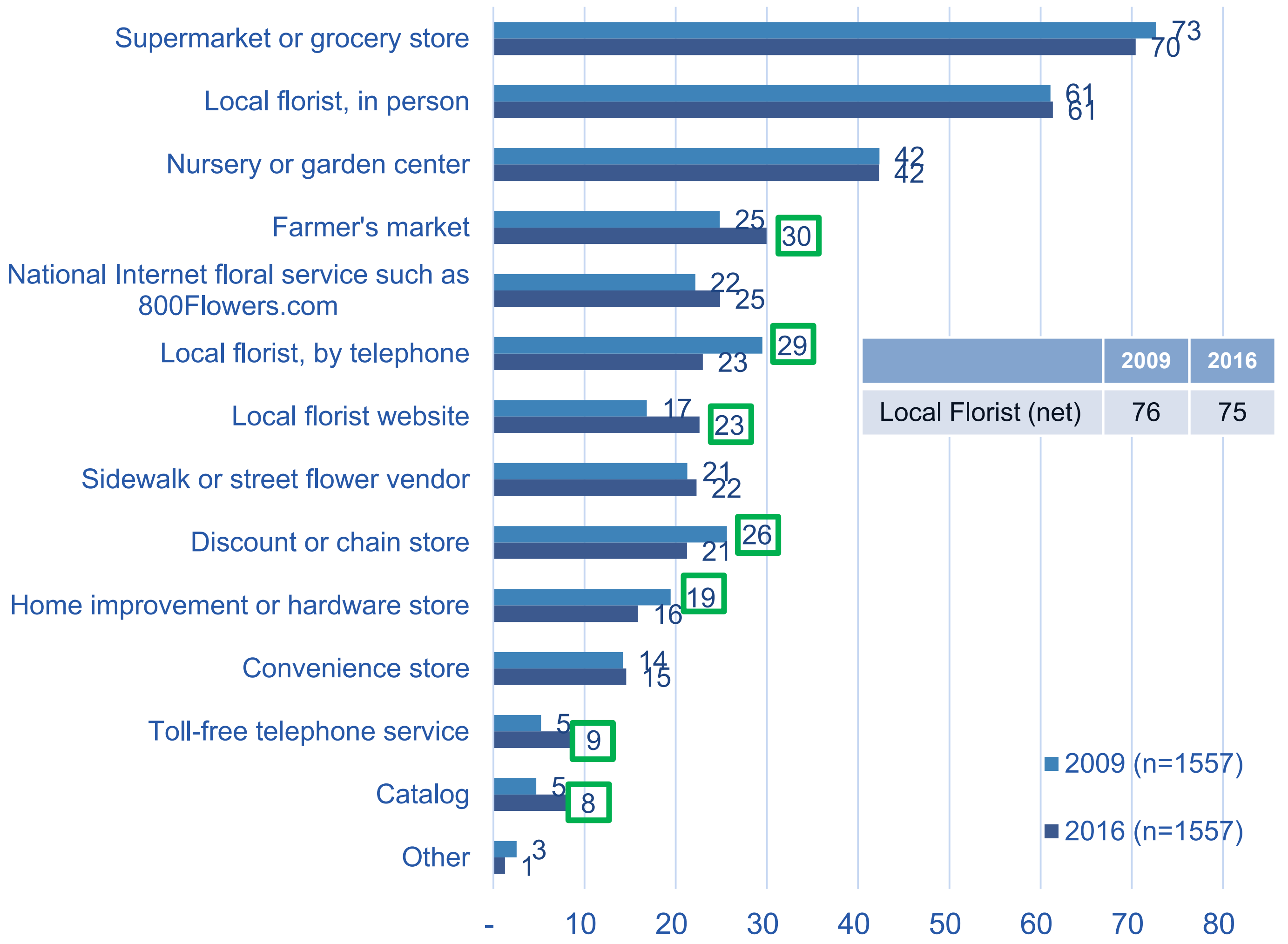
- ✓ Has a wide selection of products and arrangement types
- ✓ Fast and easy to order/ buy from
- ✓ Are affordable
- ✓ Presentation and availability of attractive vases, baskets, other containers and packaging
- ✓ Provides delivery options
- ✓ Offer interesting designs/styles that make an impact

Having a wide selection of products and arrangement types is the only universal driver across the three retail channels.

Being fast and easy to order/buy from is common to both supermarkets/discount retailers and online.

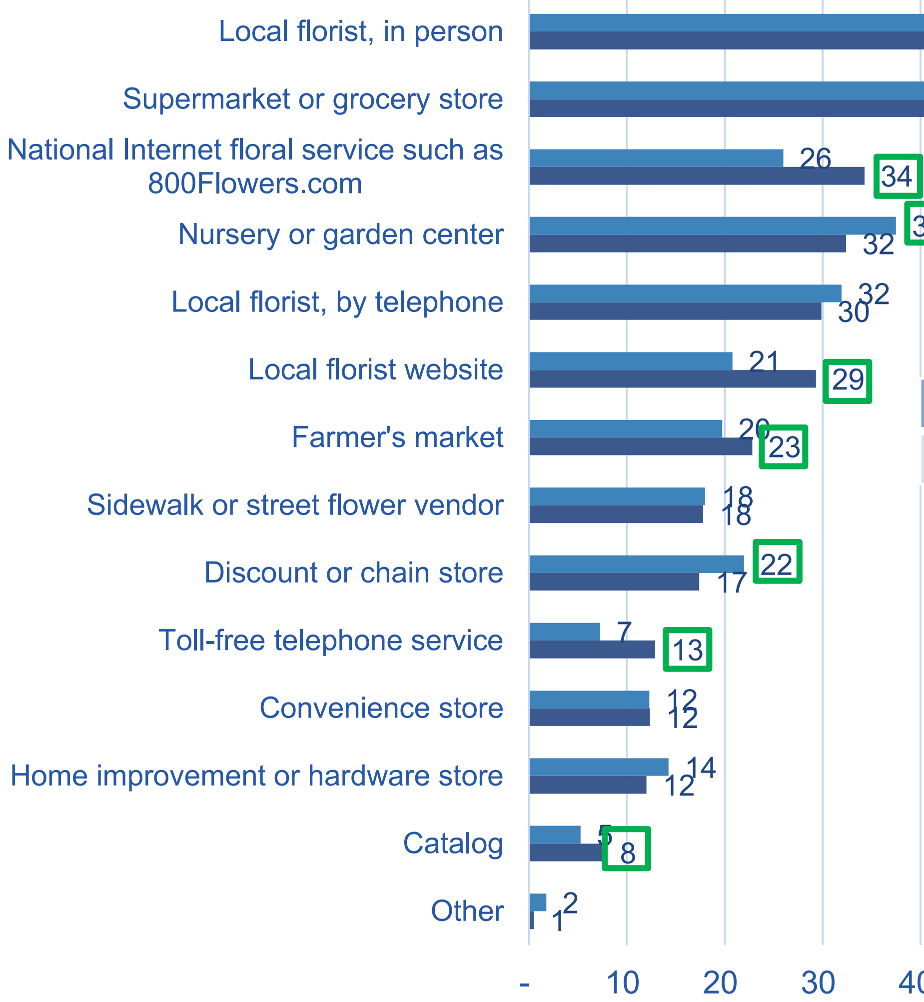
LOCATIONS TYPICALLY PURCHASE FLOWERS

PURCHASE FOR SELF



	2009	2016
Local Florist (net)	76	75

PURCHASE AS GIFT



	2009	2016
Local Florist (net)	80	82

Local florists (all methods combined) are the most widely shopped channel for both self and gift purchases, with the channel slightly more used for gift purchases. Supermarkets remain the second most widely shopped channel. Since 2009, there has been an increase in flower purchasing via farmer's markets, online, toll-free phone, and catalogs, while discount/chain stores, local florists (by telephone), and home improvement centers have declined.

Base: Total Respondents
Q. 3a. Please indicate where you typically purchase flowers <u>for yourself.</u> (Check All That Apply)
Q. 4a. Please indicate where you typically purchase flowers as <u>a gift for someone else.</u> (Check All That Apply)

LOCATIONS TYPICALLY PURCHASE FLOWERS: FOR SELF

	Total		Gen Y's		Gen X's		Baby Boomers	
	2009	2016	2009	2016	2009	2016	2009	2016
Total Respondents	(1557)	(1557)	(519)	(522)	(512)	(510)	(526)	(525)
	%	%	%	%	%	%	%	%
Local Florist (net)	76	75	78	76	76	80	73	69
Local florist, in person	61	61	63	61	60	67	60	57
Local florist, by telephone	29	23	26	27	32	21	30	21
Local florist website	17	23	20	28	17	25	14	15
Supermarket or grocery store	73	70	74	64	73	70	71	77
Nursery or garden center	42	42	36	38	38	41	52	48
Farmer's market	25	30	24	33	24	27	26	30
National Internet floral service such as 800Flowers.com	22	25	24	28	21	25	21	21
Sidewalk or street flower vendor	21	22	24	24	21	21	18	22
Discount or chain store	26	21	22	24	24	18	30	22
Home improvement or hardware store	19	16	17	18	19	15	22	15
Convenience store	14	15	18	24	18	13	7	6
Toll-free telephone service	5	9	5	12	6	9	4	5
Catalog	5	8	6	14	6	6	2	4
Other	3	1	3	0	2	1	3	3

When purchasing for themselves, there has been a significant decrease in purchasing from supermarkets/grocery stores among Generation Y, while it has significantly increased among Baby Boomers. Farmer's markets has emerged as a growing channel across all generations and local florists websites has particularly grown in usage among Generations Y and X.

Base: Total Respondents
Q. 3a. Please indicate where you typically purchase flowers for yourself. (Check All That Apply)

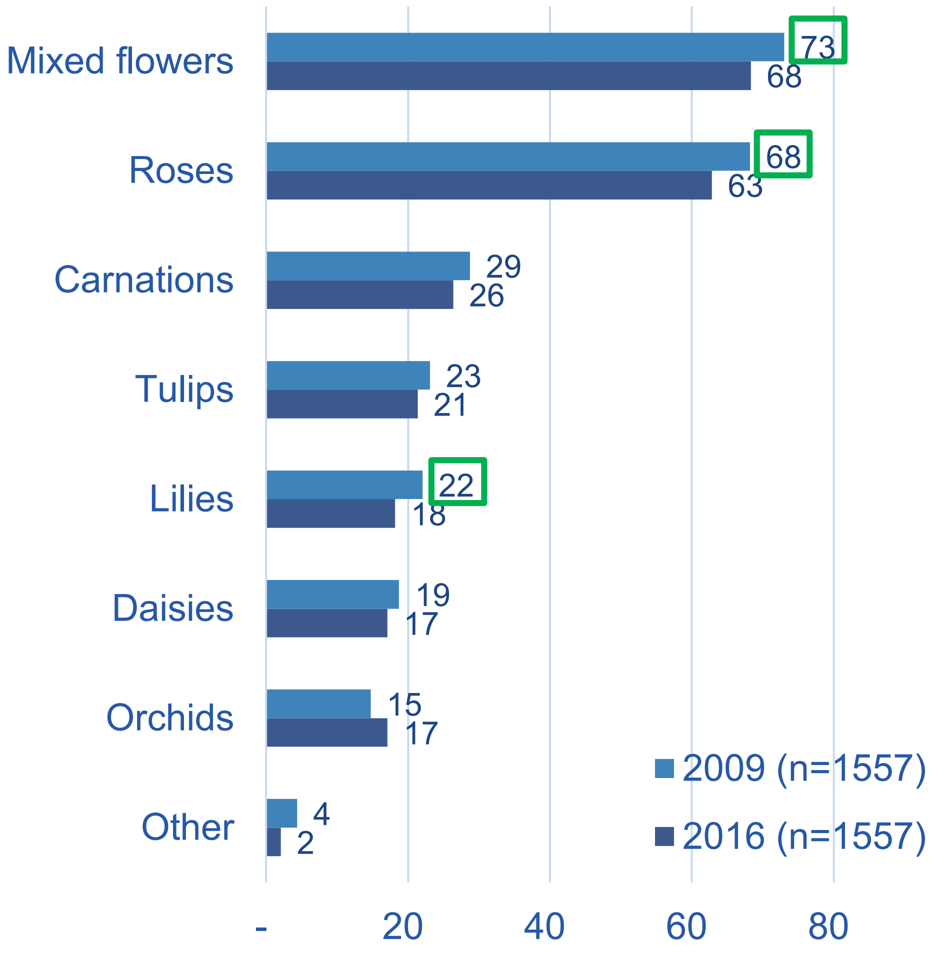
LOCATIONS TYPICALLY PURCHASE FLOWERS: FOR GIFT

	Total		Gen Y's		Gen X's		Baby Boomers	
	2009	**2016**	**2009**	**2016**	**2009**	**2016**	**2009**	**2016**
Total Respondents	(1557)	(1557)	(519)	(522)	(512)	(510)	(526)	(525)
	%	%	%	%	%	%	%	%
Local Florist (net)	80	82	80	78	80	85	81	82
Local florist, in person	64	64	66	58	63	68	63	64
Local florist, by telephone	32	30	28	28	31	31	37	30
Local florist website	21	29	24	33	20	30	19	25
Supermarket or grocery store	68	58	70	55	68	57	67	62
National Internet floral service such as 800Flowers.com	26	34	26	33	26	36	26	34
Nursery or garden center	37	32	36	31	32	35	44	32
Farmer's market	20	23	22	32	18	19	20	18
Sidewalk or street flower vendor	18	18	20	21	17	17	16	15
Discount or chain store	22	17	20	20	23	15	24	17
Toll-free telephone service	7	13	7	14	8	14	7	10
Convenience store	12	12	16	21	14	11	7	5
Home improvement or hardware store	14	12	13	14	16	10	13	12
Catalog	5	8	7	13	6	6	3	5
Other	2	1	1	0	1	0	3	1

Both local florists (in person) and supermarkets have declined in usage among Generation Y, although local florists (in person) have increased among Generation X. There has been an overall rise in non-brick & mortar locations (web, phone). The increase in usage of farmer's markets has been strongly driven by Generation Y.

Base: Total Respondents
Q. 4a. Please indicate where you typically purchase flowers as a gift for someone else. (Check All That Apply)

TYPES OF FLOWERS TYPICALLY PURCHASE



	Gen Y's		Gen X's		Baby Boomers		Males		Females	
	2009	2016	2009	2016	2009	2016	2009	2016	2009	2016
Total Respondents	(519)	(522)	(512)	(510)	(526)	(525)	(777)	(780)	(780)	(777)
	%	%	%	%	%	%	%	%	%	%
Mixed flowers	63	59	73	69	83	76	65	60	82	77
Roses	74	66	70	68	61	55	75	69	62	56
Carnations	27	25	31	28	28	25	23	21	34	32
Tulips	28	29	24	21	17	15	19	19	27	24
Lilies	28	26	23	18	16	11	17	17	27	20
Daisies	24	23	18	17	14	12	13	14	24	20
Orchids	19	24	14	14	12	13	14	17	16	17
Other	3	1	4	2	6	3	4	1	5	3

Mixed flowers and roses remain by far the most commonly purchased flowers. Generation Y still purchases roses most often, Baby Boomers most often purchase mixed flowers, and Generation X continues to equally purchase the two types. The remaining types of flowers have a near equal purchase history among Generation Y while carnations and tulips comprise the second tier among Generation X and Baby Boomers.

Base: Total Respondents
Q. 5. What types of flowers do you typically purchase? (Check All That Apply)

GENERAL AMOUNT SPENT ON FLOWERS

	Total		Gen Y's		Gen X's		Baby Boomers		Males		Females	
	2009	2016	2009	2016	2009	2016	2009	2016	2009	2016	2009	2016
Total Respondents	(1557)	(1557)	(519)	(522)	(512)	(510)	(526)	(525)	(777)	(780)	(780)	(777)
	%	%	%	%	%	%	%	%	%	%	%	%
A Present To Myself												
Mean Dollars:	$20.83	$16.55	$16.09	$16.26	$18.71	$18.01	$26.62	$15.35	$20.44	$15.94	$20.98	$16.88
"Just Because" Pick-Me-Up Gift For Someone												
Mean Dollars:	$25.98	$22.15	$22.87	$20.30	$26.36	$25.11	$28.50	$20.95	$28.47	$23.81	$23.66	$20.61
A Traditional Holiday/ Occasion Gift For Someone												
Mean Dollars:	$37.90	$32.69	$31.30	$26.70	$39.04	$34.09	$42.99	$36.91	$38.71	$32.15	$37.14	$33.22
Decoration Inside Home												
Mean Dollars:	$24.44	$20.83	$21.14	$18.45	$23.87	$23.20	$27.66	$20.75	$25.18	$23.01	$23.96	$19.16
Decoration For Office												
Mean Dollars:	$18.87	$18.13	$17.86	$17.34	$18.87	$19.44	$19.97	$17.33	$19.53	$18.86	$18.41	$17.45
For a Funeral or Sympathy												
Mean Dollars:	na	$43.23	na	$33.53	na	$46.40	na	$48.92	na	$41.24	na	$44.95

There has been an overall decrease in spending in flower purchases across several occasions, however this was largely driven by decreases among Baby Boomers, while spending among Generations Y and X was more consistent over time. Funerals/sympathy results in the highest average spend, followed by holiday/occasion gifts and "just because".

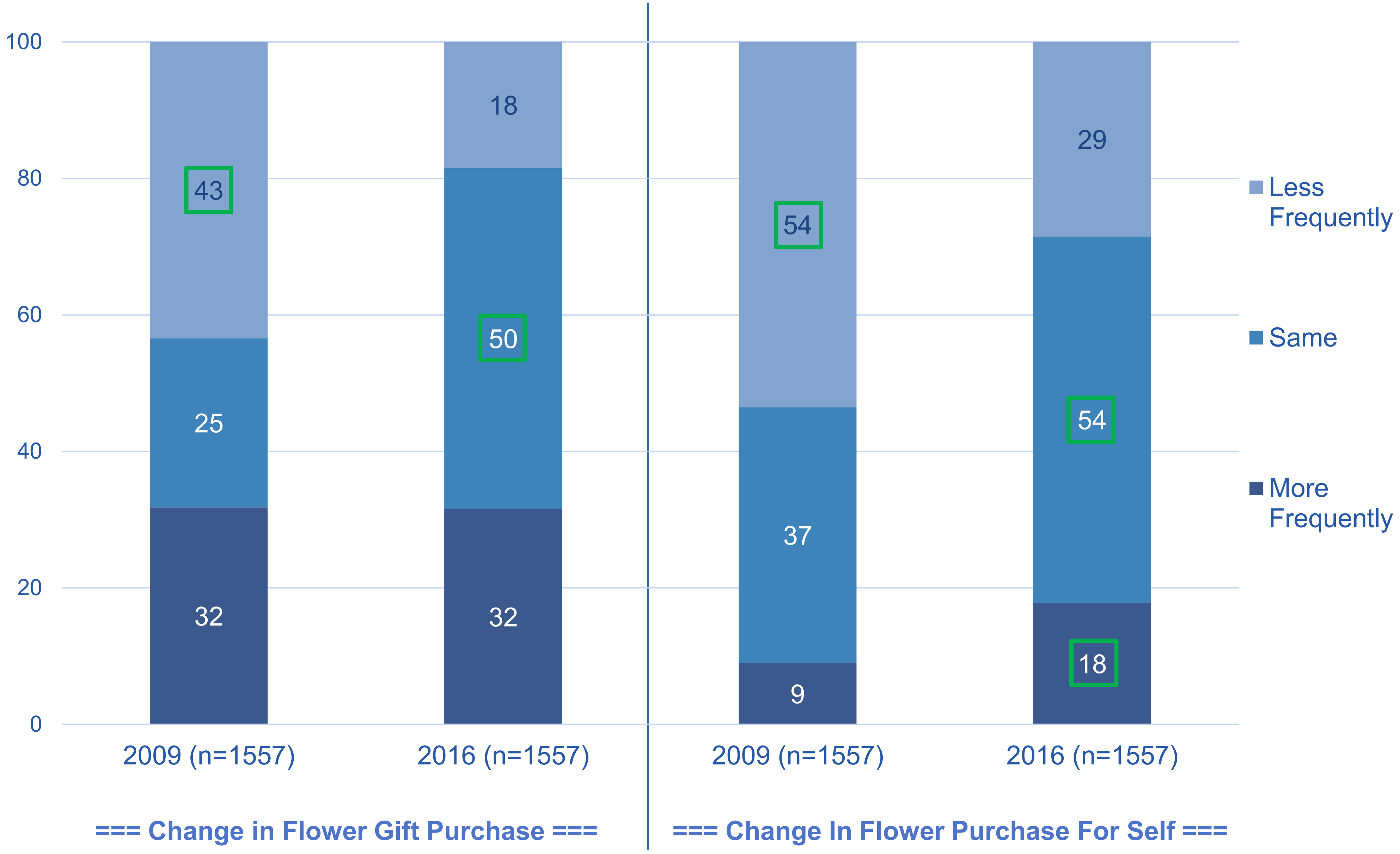
Base: Total Respondents
Q. 24. How much do you generally spend when purchasing flowers for each of the following purposes? Please enter a numeric value below. If zero to any of the following, please enter "0." (Enter Dollar Amount)

FLOWER PURCHASE TREND

Despite a slight downward trend in average spend, there has a positive shift in flower purchase frequency.

While one-third indicate they are purchasing flowers as a gift more frequently (equal to 2009), there has been a large shift from those saying they are purchasing less often to now saying they purchase the same.

Meanwhile, double the percentage of consumers are purchasing for themselves more often and a majority indicate they're purchasing the same amount.



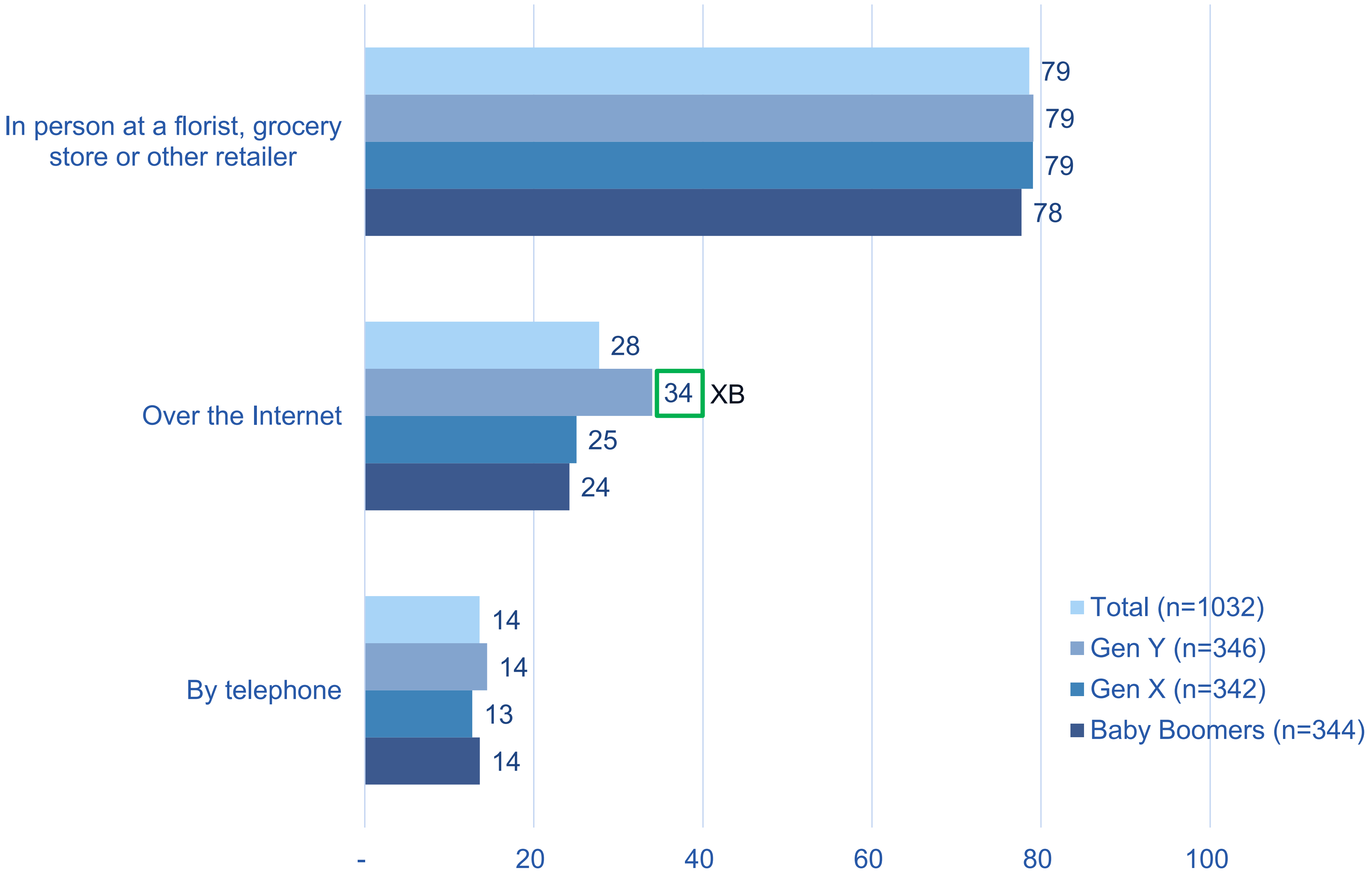
Base: Total Respondents
Q. 23. Compared to previous years, would you say you purchased flowers more or less frequently in the past year for yourself or as a gift? If nothing has changed, please indicate your answer below. (Check One Answers For Each)

FLOWER PURCHASE METHOD PREFERENCE

In person is by far the most preferred method of purchasing flowers as gifts.

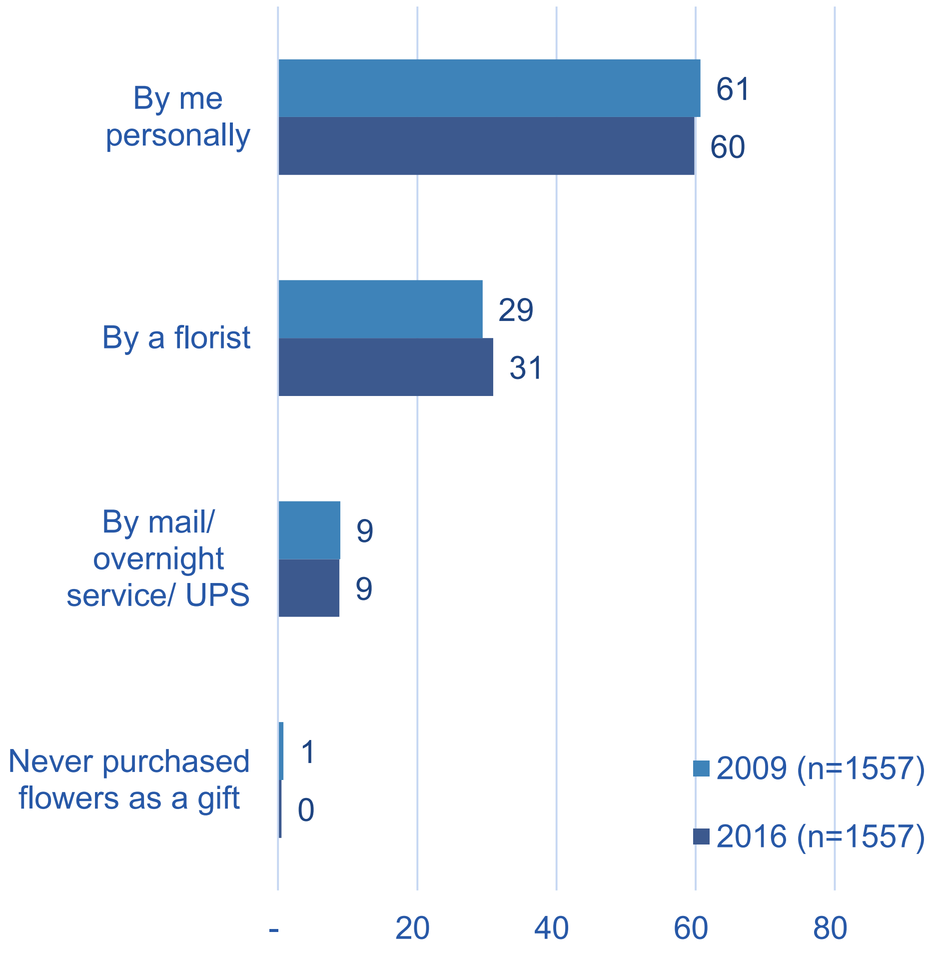
Generation Y is significantly more likely than other generations to indicate they prefer to purchase flowers online.

Only one in seven consumers prefer to purchase gifts of flowers over the phone.



Base: Total Purchase Flowers As Gift (2016 Wave)
Q. 12. By which means do you prefer to purchase gifts of flowers? (Check All That Apply)

MOST OFTEN USED DELIVERY METHOD



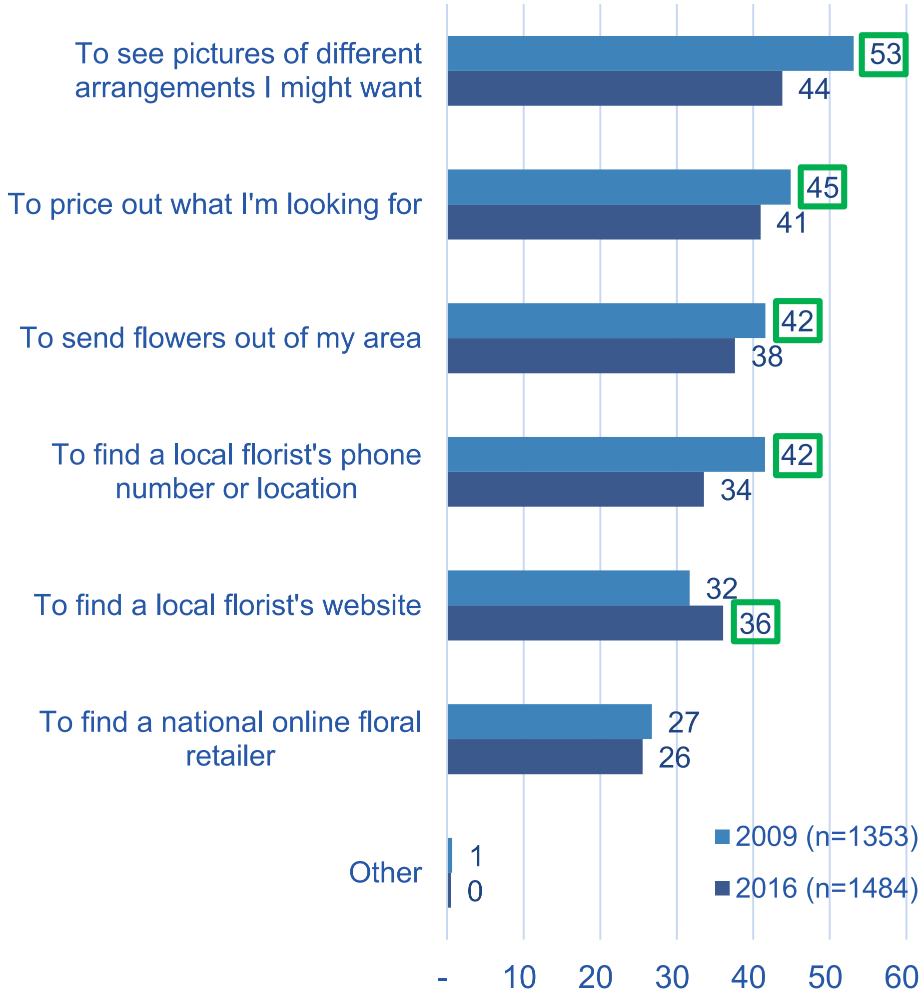
	Gen Y's		Gen X's		Baby Boomers		Males		Females	
	2009	2016	2009	2016	2009	2016	2009	2016	2009	2016
Total Respondents	(519)	(522)	(512)	(510)	(526)	(525)	(777)	(780)	(780)	(777)
	%	%	%	%	%	%	%	%	%	%
By me personally	70	63	58	59	54	58	64	62	58	58
By a florist	19	25	33	33	35	35	27	29	31	33
By mail/ overnight service/ UPS	10	12	8	8	9	7	8	9	10	9
Never purchased flowers as a gift	1	1	1	0	1	1	1	0	1	1

Three in five consumers indicate they most often deliver flowers as a gift in person, compared to three in ten who have it delivered by a florist and one in ten who use a shipping service. There has been a significant decrease in the percentage of Generation Y who deliver flowers in person, with a notable increase in usage of a florist to deliver the gift.

Base: Total Respondents

Q. 13. When you give flowers as a gift, how are they delivered most often? (Check One Answer)

ROLE OF INTERNET IN FLOWER PURCHASE PROCESS

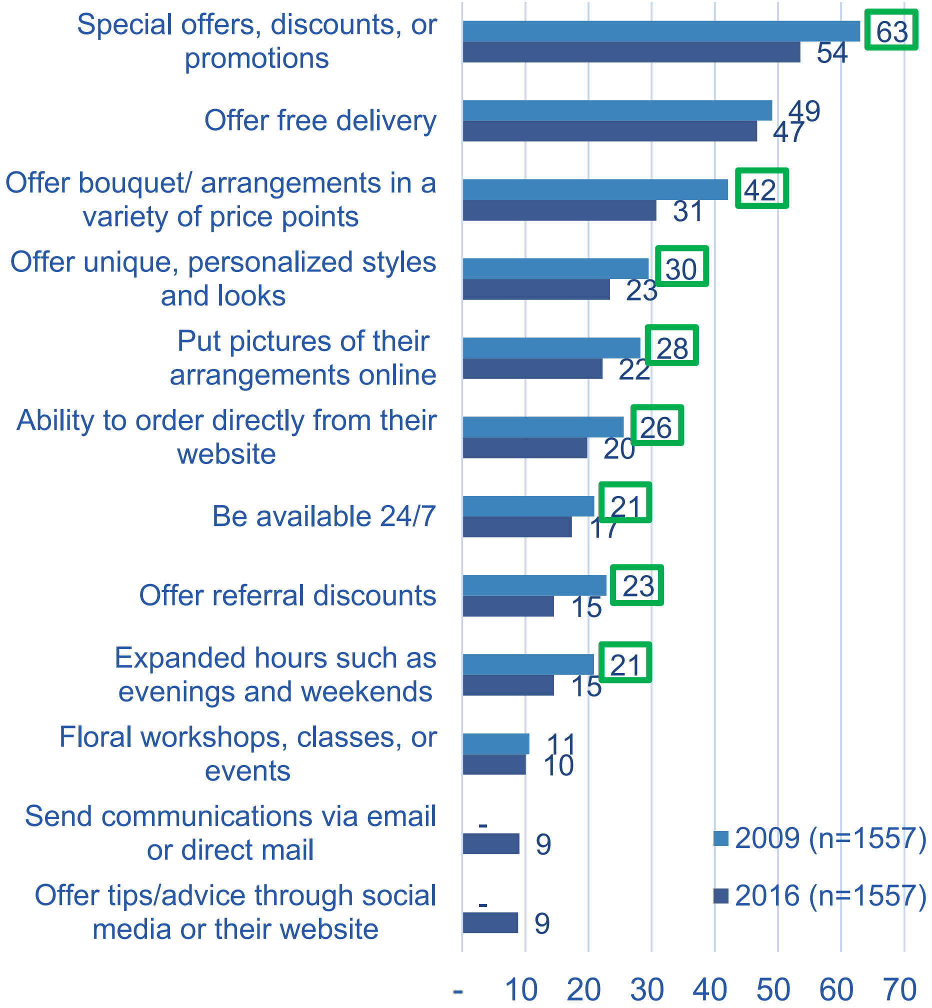


	Gen Y's		Gen X's		Baby Boomers	
	2009	**2016**	**2009**	**2016**	**2009**	**2016**
Total Respondents	(464)	(515)	(448)	(495)	(441)	(474)
	%	%	%	%	%	%
To see pictures of different arrangements I might want	52	37	52	44	55	51
To price out what I'm looking for	47	41	43	41	45	41
To send flowers out of my area	33	30	42	36	51	48
To find a local florist's website	30	37	33	37	32	33
To find a local florist's phone number or location	43	30	41	39	40	31
To find a national online floral retailer	22	23	26	24	32	29
Other	0	-	1	-	1	2

Viewing pictures of arrangements and pricing purposes remain the ways the Internet is most commonly used in the flower purchase process. Sending flowers outside of an immediate area and finding a florist's number/website were also commonly mentioned. There was an overall decline in the percentage who indicated they used each option, though results were more consistent by generation. More consumers are now using the Internet to find a florist's website rather than phone number.

Base: Total Used Internet To Buy Flowers
Q. 19. In which of the following ways have you used the Internet when purchasing flowers? (Check All That Apply)

MOTIVATORS TO SHOP AT FLORISTS MORE OFTEN

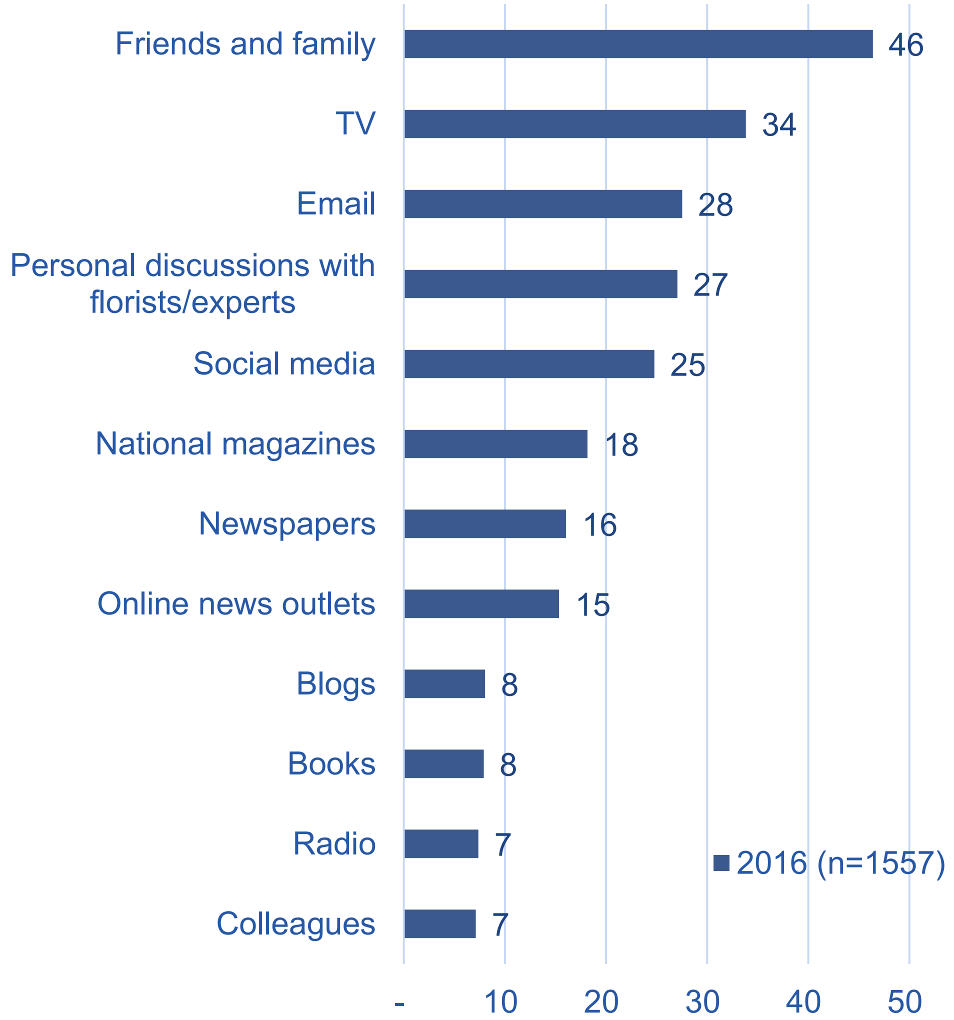


	Gen Y's		Gen X's		Baby Boomers	
	2009	2016	2009	2016	2009	2016
Total Respondents	(519)	(522)	(512)	(510)	(526)	(525)
	%	%	%	%	%	%
Special offers, discounts, or promotions	60	39	65	55	64	66
Offer free delivery	43	39	52	44	52	57
Offer bouquet/ arrangements in a variety of price points	36	28	43	27	47	37
Offer unique, personalized styles and looks	30	25	31	23	27	22
Put pictures of their arrangements online	31	21	28	23	26	23
Ability to order directly from their website	27	20	28	21	22	19
Be available 24/7	22	23	19	18	21	11
Offer referral discounts	24	13	23	14	21	16
Expanded hours such as evenings and weekends	21	18	20	13	22	13
Floral workshops, classes, or events	13	15	12	9	7	6
Send communications via email or direct mail	-	11	-	8	-	8
Offer tips/advice through social media or their website	-	13	-	8	-	5
Other	3	0	3	1	7	1
None/nothing	1	1	2	1	2	4

One-half of consumers would shop at a local florist more often if they offered special offers, discounts, or promotions, and free delivery. Arrangements/bouquets at a variety of price points is also a top motivator. Most percentages are significantly lower compared to 2009 though the hierarchy from most to least motivating remained intact.

Base: Total Respondents
Q. 22. Which of the following would motivate you to shop at a local florist more often? (Check All That Apply)

THREE FAVORITE WAYS TO RECEIVE INFO/TRENDS ABOUT FLOWERS



	Age			Gender	
	Gen Y's	Gen X's	Baby Boomers	Male	Female
Total Respondents	(522)	(510)	(525)	(780)	(777)
	%	%	%	%	%
Friends and family	44	47	48	45	48
TV	30	37 Y	35	33	35
Email	24	27	31 Y	25	30
Personal discussions with florists/experts	22	27	32	28	26
Social media	32 B	29 B	14	18	31
National magazines	16	17	22 YX	16	20
Newspapers	12	14	22	20	12
Online news outlets	16 XB	19 B	11	18	13
Blogs	14	5	5	8	8
Books	10 X	5	8	8	8
Radio	8	8	6	9	6
Colleagues	7	9	6	10	5
Other	1	1	2	1	2

Nearly one-half of the target audience prefer to get information about flowers from friends and family. This was consistent across age and gender. Baby Boomers were significantly more likely to prefer personal discussions with florists than Gen Y's while social media was preferred by about one-third of Gen Y's and Gen X's, significantly more than Baby Boomers.

Base: Total Respondents
Q. D1. What are the top three ways you prefer to receive information and trends about flowers? (Check 3 Answers) *Changed from W1*

DETAILED FINDINGS: HOUSEPLANTS

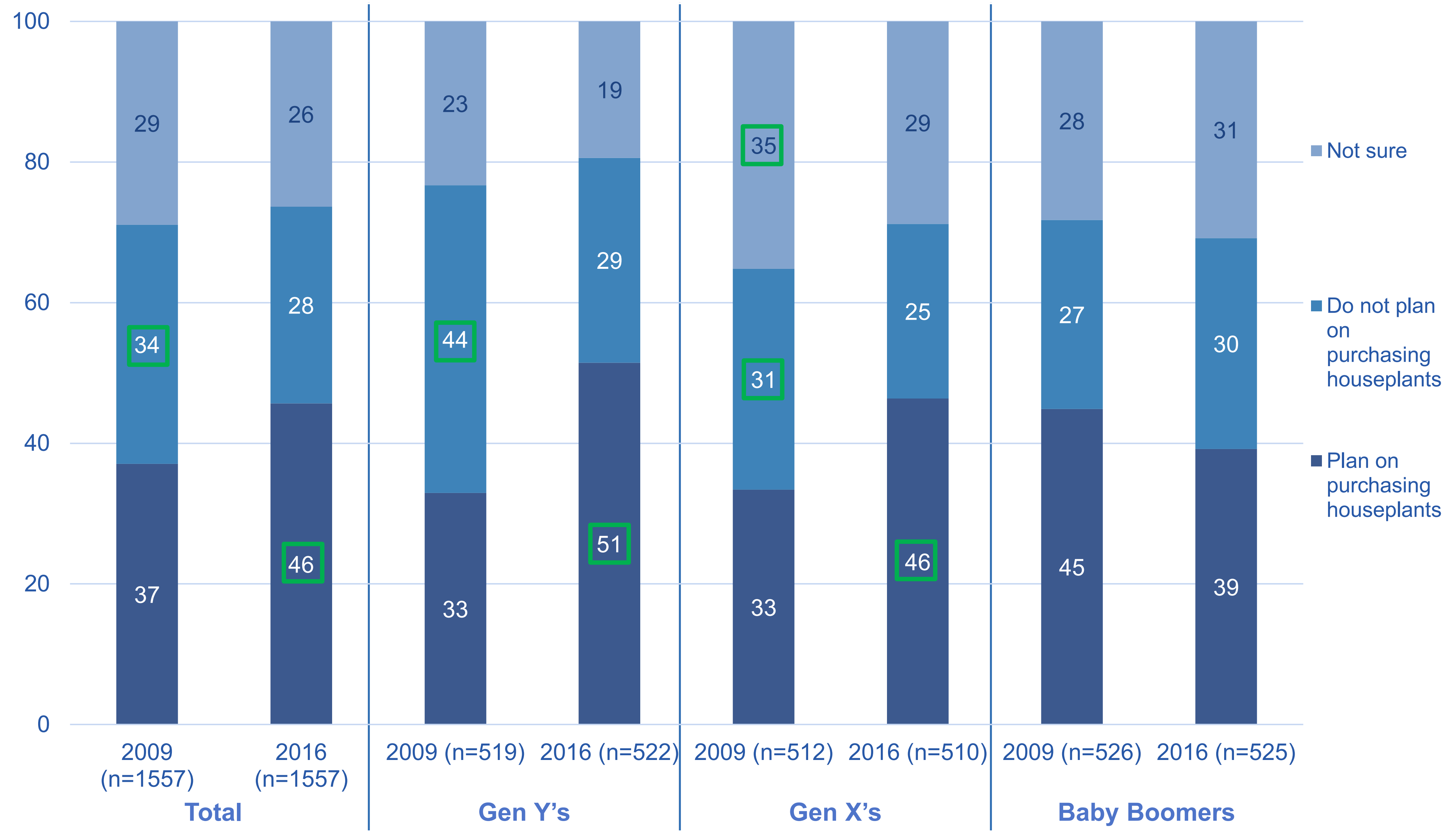
LAST PURCHASED HOUSEPLANTS

	Total		Gen Y's		Gen X's		Baby Boomers	
	2009	2016	2009	2016	2009	2016	2009	2016
Total Respondents	(1557)	(1557)	(519)	(522)	(512)	(510)	(526)	(525)
	%	%	%	%	%	%	%	%
In The Past Year (net)	55	66	50	70	53	67	63	59
Within the last month	12	19	12	24	13	17	12	15
Within the last 2 to 3 months	14	18	14	21	13	19	14	15
Within the last 4 to 6 months	14	16	11	13	12	18	19	16
Within the last 7 to 9 months	9	7	8	7	8	6	11	8
Within the last 10 to 12 months	7	6	6	5	8	7	7	5
Longer than 1 year	27	24	18	17	32	23	30	31
Never	18	11	32	13	15	10	7	9
Mean (months)	7.4	6.3	6.7	5.3	7.8	6.3	7.5	7.3
Median (months)	5.0	5.0	5.0	2.9	5.0	5.0	4.0	6.0

Two in three consumers have purchased houseplants in the past three months, a significant increase from 2009, and there was also a significant increase in the percentage who have ever purchased houseplants (82% → 88%). These increases were driven by more recent purchases among Generations Y and X.

Base: Total Respondents
Q. 26. When did you last purchase houseplants for either you or someone else? (Check One Answer)

HOUSEPLANT FUTURE PURCHASE INTENT



Nearly one-half of the target audience plans to purchase houseplants in the future.

This represents a significant increase since 2009, with large percentage increases among Generations Y and X.

Baby Boomers are less likely to plan on purchasing houseplants in the future.

Base: Total Respondents
Q. 27. Do you plan to purchase houseplants for either you or someone else within the next 6 months, if at all? (Check One Answer)

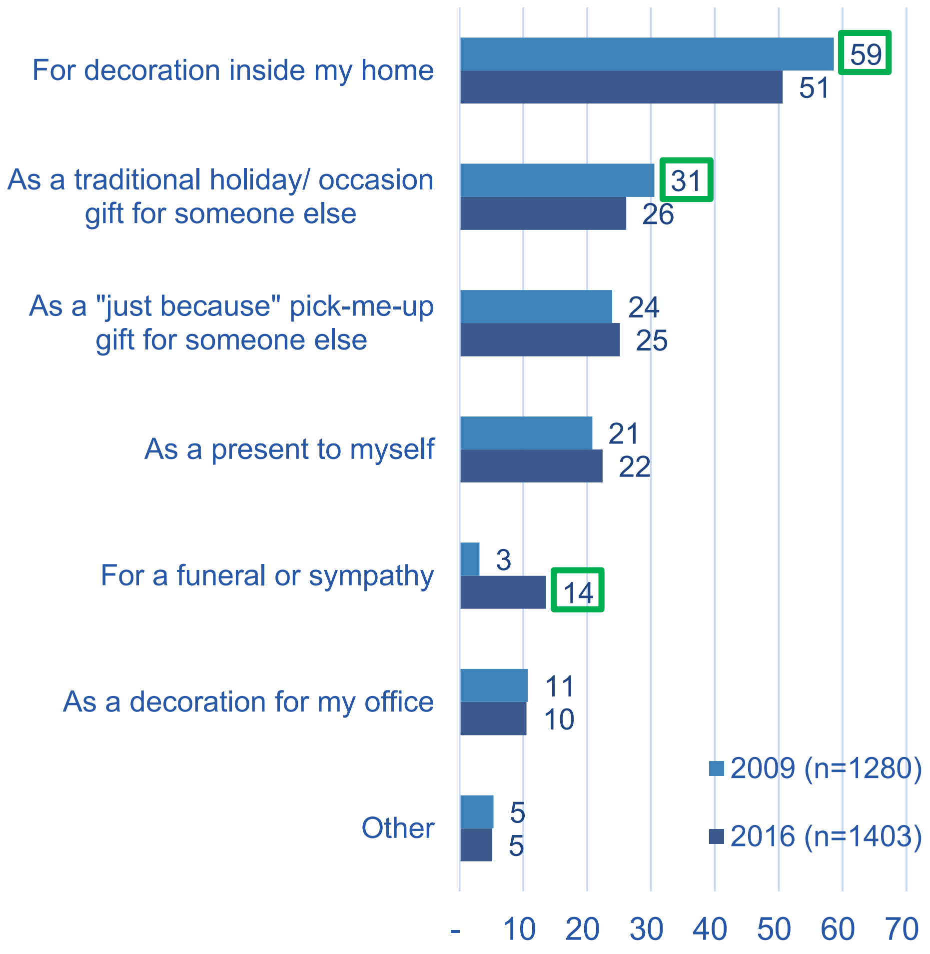
HOUSEPLANTS SPENDING

	Total	Males			Females			Total		
		Gen Y's	Gen X's	Baby Boomers	Gen Y's	Gen X's	Baby Boomers	Gen Y's	Gen X's	Baby Boomers
Total Respondents	(1403)	(235)	(227)	(229)	(230)	(236)	(246)	(465)	(463)	(475)
	%	%	%	%	%	%	%	%	%	%
As A Present To Myself										
Mean Dollars:	$18.36	$13.47	$22.23 Y	$16.60	$25.06	$17.42	$15.05	$20.07	$19.30 B	$15.61
As A "Just Because" Pick-Me-Up Gift For Someone Else										
Mean Dollars:	$20.66	$16.48	$30.61 Y	$20.24	$22.86	$18.07	$16.29	$19.91	$23.94	$17.96
As A Traditional Holiday/ Occasion Gift For Someone Else										
Mean Dollars:	$23.99	$15.72	$29.18 Y	$25.34 Y	$24.54	$23.75	$23.96	$20.71	$26.39	$24.60
For Decoration Inside My Home										
Mean Dollars:	$22.13	$20.54	$25.34	$21.71	$25.26	$21.63	$18.07	$23.21	$23.39 B	$19.78
As A Decoration For My Office										
Mean Dollars:	$19.98	$17.51	$22.40	$16.73	$26.49	$16.34	$15.30	$22.02	$19.48	$15.97
For A Funeral Or Sympathy										
Mean Dollars:	$33.99	$18.23	$34.68 Y	$38.82 Y	$34.13	$36.63	$39.38	$26.75	$35.74 Y	$39.15 Y

With the exception of Funerals/Sympathy ($34), most houseplant purchases tend to be around $20 on average. Males in Generation Y typically spend the least on houseplants.

Base: Total Have Purchased Houseplants (2016 Wave)
Q. 30. How much do you generally spend when purchasing houseplants for the following purposes? Please enter a numeric value below. If zero to any of the following, please enter "0." (Enter Dollar Amount)

REASONS PURCHASED HOUSEPLANTS IN PAST 12 MONTHS

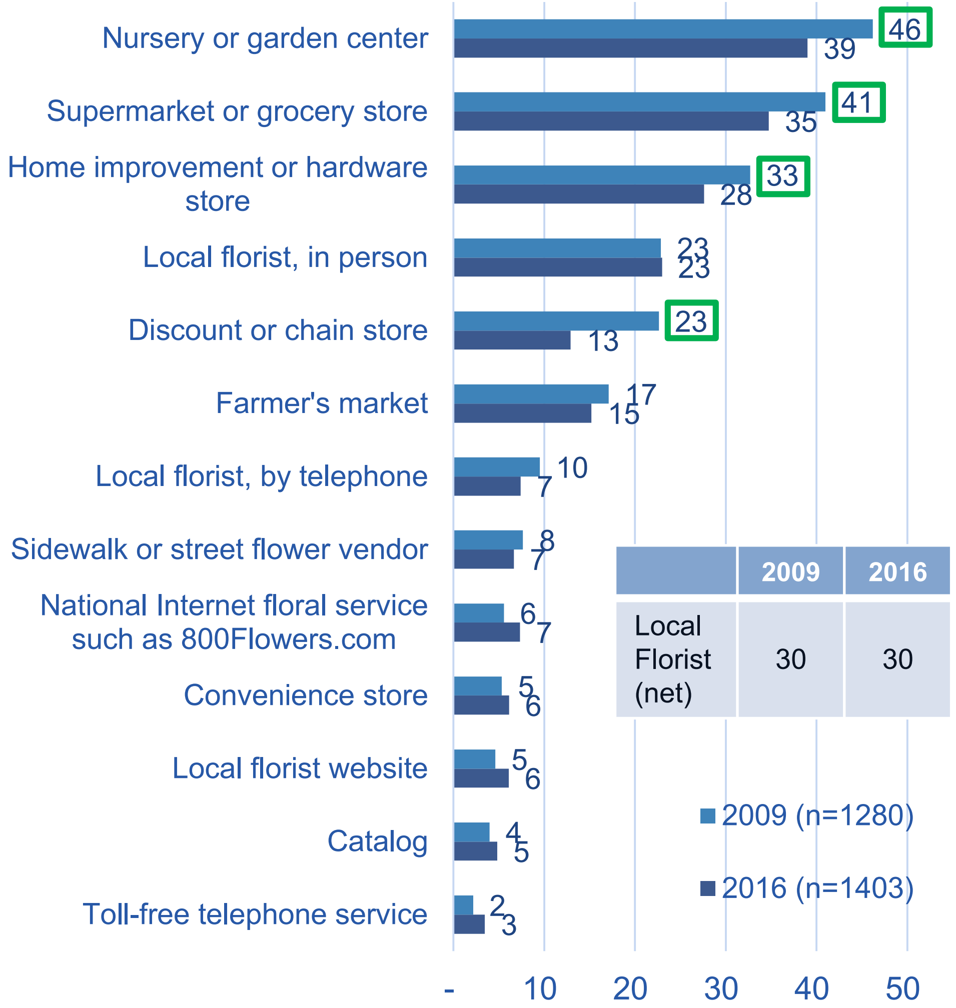


	Gen Y's		Gen X's		Baby Boomers	
	2009	2016	2009	2016	2009	2016
Total Purchased Houseplants	(354)	(465)	(435)	(463)	(491)	(475)
	%	%	%	%	%	%
For decoration inside my home	62	45	55	54	59	52
As a traditional holiday/ occasion gift for someone else	28	24	29	23	34	31
As a "just because" pick-me-up gift for someone else	25	29	22	26	25	20
As a present to myself	22	25	19	21	21	22
For a funeral or sympathy	1	13	4	15	4	13
As a decoration for my office	15	17	9	9	9	5
Other	1	0	6	5	7	9

Home décor remains the primary reason for purchasing houseplants, followed by a traditional holiday/occasion gift, "just because" and as a present to themselves.

Base: Total Have Purchased Houseplants
Q. 28. Which of the following are reasons you have purchased houseplants within the last year? (Check All That Apply)

LOCATIONS WHERE TYPICALLY PURCHASE HOUSEPLANTS



	2009	2016
Local Florist (net)	30	30

	Gen Y's		Gen X's		Baby Boomers	
	2009	2016	2009	2016	2009	2016
Total Purchased Houseplants	(354)	(465)	(435)	(463)	(491)	(475)
	%	%	%	%	%	%
Local Florist (net)	34	32	27	33	30	25
Local florist, in person	25	22	20	26	24	21
Local florist, by telephone	13	11	9	7	8	5
Local florist website	7	9	5	6	3	4
Nursery or garden center	35	25	44	39	56	52
Supermarket or grocery store	40	37	38	33	45	35
Home improvement or hardware store	28	21	34	28	34	34
Farmer's market	18	20	15	12	19	14
Discount or chain store	18	12	21	11	28	16
National Internet floral service such as 800Flowers.com	7	12	5	6	6	4
Sidewalk or street flower vendor	9	10	7	5	7	6
Convenience store	7	10	5	5	4	4
Catalog	7	8	3	5	3	1
Toll-free telephone service	3	6	2	3	1	2
Other	1	-	2	0	2	0
Don't buy flowers for myself/I don't	1	-	1	1	1	2

Nursery/garden centers, supermarkets/grocery stores, and local florists are the three most common channels for purchasing houseplants. Nearly one-quarter of houseplant purchasers have made the purchase in-person at a local florist.

Base: Total Have Purchased Houseplants
Q. 29. Please indicate where you typically purchase houseplants for either you or someone else. (Check All That Apply)

APPENDIX

DEMOGRAPHICS

	Total		Males						Females						Gen Y's		Gen X's		Baby Boomers	
			Gen Y's		Gen X's		Baby Boomers		Gen Y's		Gen X's		Baby Boomers		Total		Total		Total	
	2009	2016	2009	2016	2009	2016	2009	2016	2009	2016	2009	2016	2009	2016	2009	2016	2009	2016	2009	2016
Total Respondents	(1557)	(1557)	(259)	(261)	(261)	(254)	(257)	(265)	(260)	(261)	(251)	(256)	(269)	(260)	(519)	(522)	(512)	(510)	(526)	(525)
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Gender																				
Male	50	50	100	100	100	100	100	100	-	-	-	-	-	-	50	50	50	50	50	50
Female	50	50	-	-	-	-	-	-	100	100	100	100	100	100	50	50	50	50	50	50
Age																				
Mean	38.6	45.4	24.3	30.1	38.3	45.6	52.9	60.9	25.1	29.8	38.5	45.5	52.4	60.6	24.7	29.9	38.4	45.6	52.7	60.8
Median	39.0	46.0	24.0	31.0	39.0	46.0	53.0	61.0	26.0	29.0	39.0	46.0	53.0	60.0	25.0	30.0	39.0	46.0	53.0	61.0
Marital Status																				
Married	51	53	27	41	52	57	62	63	42	48	65	54	60	56	34	45	59	55	61	59
Not Married (net)	48	46	72	59	47	41	38	36	57	50	35	46	39	44	65	55	41	44	39	40
Refused	1	1	1	-	1	1	-	0	1	1	-	0	1	-	1	1	0	1	0	0
Mean Household Size:	2.9	2.7	3.0	2.8	3.0	2.9	2.5	2.2	3.2	3.4	3.4	3.0	2.6	2.1	3.1	3.1	3.2	2.9	2.5	2.2
Presence Of Children In Household																				
Children present	41	38	33	44	52	49	20	11	49	62	69	48	26	14	41	53	61	49	23	12
No children present	59	62	67	56	48	51	80	89	51	38	31	52	74	86	59	47	39	51	77	88
Education																				
No College (net)	27	27	30	28	28	24	19	22	27	29	29	34	30	28	29	29	28	29	25	25
College (net)	72	72	69	72	72	76	81	78	73	70	71	66	69	72	71	71	71	71	75	75
Refused	0	0	1	-	1	-	-	-	-	1	0	-	0	0	0	0	1	-	0	0
Employment Status																				
Employed (net)	56	56	58	71	70	77	55	47	47	44	54	57	53	37	52	58	62	67	54	42
Not Employed (net)	42	44	40	28	28	22	42	52	52	55	45	43	44	62	46	42	37	32	43	57
Refused	2	1	2	1	2	1	3	1	2	0	0	0	3	1	2	1	1	1	3	1
Mean Household Income (thousands):	$63.84	$62.82	$56.93	$57.99	$62.58	$71.39	$71.47	$74.59	$58.38	$52.92	$68.50	$59.09	$63.50	$60.85	$57.64	$55.46	$65.54	$65.25	$67.70	$67.82
Hispanic Origin Or Descent																				
Hispanic	8	11	10	15	8	11	5	4	10	16	8	14	4	5	10	16	8	12	5	5
Not Hispanic	91	89	88	85	91	89	93	94	88	84	91	85	93	95	88	84	91	87	93	95
Refused	2	1	2	-	1	1	2	1	2	1	0	0	3	-	2	0	1	1	2	1

DEMOGRAPHICS

	Total		Males						Females						Gen Y's		Gen X's		Baby Boomers	
			Gen Y's		Gen X's		Baby Boomers		Gen Y's		Gen X's		Baby Boomers		Total		Total		Total	
	2009	2016	2009	2016	2009	2016	2009	2016	2009	2016	2009	2016	2009	2016	2009	2016	2009	2016	2009	2016
Total Respondents	(1557)	(1557)	(259)	(261)	(261)	(254)	(257)	(265)	(260)	(261)	(251)	(256)	(269)	(260)	(519)	(522)	(512)	(510)	(526)	(525)
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Ethnicity																				
Caucasian	81	77	74	70	77	79	84	83	77	72	82	77	90	82	75	71	80	78	87	83
African-American	8	12	10	15	13	12	8	9	5	11	8	15	4	12	8	13	10	14	6	10
Asian/Pacific Islander	4	5	7	9	4	3	2	4	7	9	3	2	2	3	7	9	3	3	2	3
Native American	1	1	0	1	1	2	2	1	1	2	0	2	0	1	1	2	1	2	1	1
Mixed background	2	1	1	1	2	1	1	1	3	1	3	1	1	1	2	1	2	1	1	1
Other	2	1	4	3	2	0	1	1	3	3	2	0	1	-	3	3	2	0	1	0
Refused	3	2	4	2	2	3	2	1	3	2	2	2	2	2	4	2	2	2	2	2
Type Of Community																				
Urban	25	30	30	40	26	29	24	26	27	37	25	27	17	20	29	39	26	28	20	23
Suburban	50	49	50	44	50	56	54	54	47	41	52	49	49	52	48	42	51	53	52	53
Rural	25	21	20	16	24	15	22	20	26	22	23	24	33	28	23	19	23	20	28	24
Census Region																				
Northeast	18	19	15	17	20	19	17	22	18	17	18	19	21	21	16	17	19	19	19	21
South	33	36	32	40	33	37	32	35	38	33	33	32	31	36	35	37	33	35	32	36
Midwest	28	23	29	23	28	21	31	21	25	23	27	26	28	26	27	23	28	24	29	24
West	21	22	24	21	19	23	20	21	19	26	22	23	20	17	22	23	20	23	20	19
Top Three Favorite Ways To Receive Flower Information																				
Friends and family	26	46	24	39	25	49	23	47	32	48	23	46	26	49	28	44	24	47	24	48
TV	14	34	15	32	14	34	13	32	15	28	13	39	14	38	15	30	13	37	13	35
Email	-	28	-	20	-	23	-	31	-	28	-	32	-	31	-	24	-	27	-	31
Personal discussions with florists/experts	-	27	-	19	-	31	-	34	-	26	-	23	-	30	-	22	-	27	-	32
Social media	-	25	-	19	-	26	-	10	-	45	-	31	-	18	-	32	-	29	-	14
National magazines	10	18	7	17	6	16	5	15	10	15	13	18	17	28	8	16	9	17	11	22
Newspapers	8	16	10	17	10	18	13	25	2	8	2	10	8	20	6	12	6	14	10	22
Online news outlets	26	15	20	18	29	21	25	15	29	13	30	18	20	8	25	16	29	19	22	11
Blogs	-	8	-	15	-	5	-	4	-	13	-	6	-	5	-	14	-	5	-	5
Books	3	8	6	14	2	6	2	5	3	7	4	5	4	11	5	10	3	5	3	8
Radio	4	7	8	10	3	8	5	8	2	6	3	8	1	4	5	8	3	8	3	6
Colleagues	2	7	4	8	1	12	2	9	1	6	2	5	-	3	3	7	2	9	1	6
Other	7	1	4	1	7	1	10	1	4	1	9	1	9	3	4	1	8	1	9	2
None/nothing	2	3	2	2	2	2	5	6	2	1	2	2	1	3	2	1	2	2	3	5

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