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UNIVERSITY of GUELPH

Plant Valuation Project: Final Report

In partnership with

GARDENCENTRES CANADA

Canadian Nursery Landscape Association
Association Canadienne des Pépiniéristes et des Paysagistes

HORTICULTURAL TRADES ASSOCIATION
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Vineland Research and Innovation Centre
and
Department of Marketing and Consumer Studies,
University of Guelph

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Project Goal

To determine what factors moderate consumers' perceived value of plants.

- When a consumer sees a price tag, how do they decide if the plant features (e.g., perceived cost of production, expected longevity, plant architecture, pot size, care convenience) make it worth the cost?

The current research can be applied towards 3 goals

1. Provide guidance for a shift towards more value-based pricing in the sector
2. Inform inventory selection strategies
3. Nudge consumers to notice hardiness or other quality features:

Consumer valuation of plants

Connecting the dots for effective decision-making

1) Preliminary interviews at garden centres

2) Online survey of Canadian & US consumers

3) In-person vs online shopping experience

Summary & Recommendations

Plant features

Executive summary

- Consumers are not price sensitive when purchasing plants at garden centres
- Purchase plants for a specific purpose, impulse purchases are low
- Features consumers value most in plants depends on plant category (annual vs. perennial) and plant variety
- Identified plant features that consumers are willing to pay for by country and plant category
- Consumer segments exist and are differentiated based on features desired, feature importance, demographic profile, involvement and knowledge
- Retailers need to identify and target their message based on a combination of features desired by consumers

Shopping experience

Executive summary

In-store shopping experience

- Value
  - Ability to interact, see and determine plant quality
  - Interaction with knowledgeable staff and friendly, personalized customer service and advice
  - Deals, promotions and special offers
- Could be improved
  - Inventory and finding plants for their specific purpose

Online shopping experience

- Value
  - Websites that are easy to navigate with real picture of plants that meet expectation at pick-up
  - Convenience, being able to shop 24/7 and curbside pick-up
  - Plant guarantees/warranties and easy return policies
- Could be improved
  - Not being able to see plant online, only stock photos
  - Can't find what they are looking for

Study 1: Preliminary interviews at garden centres

Fall 2020

Vineland Research & Innovation Centre
Consumer Insights

Objective

Capture the path to purchase for garden centre shoppers in order to:

1) Better understand the role of pricing in nursery plant purchasing decisions
2) Explore which plant qualities & garden centre factors shoppers consider during plant purchases

Methods

- 30 shopper intercept interviews were completed at three garden centre locations in Southern Ontario by Vineland
    - September 11-13, 2020
- An additional 14 interviews were conducted by store staff at one garden centre in British Columbia and one in Saskatchewan
- Shoppers were intercepted on their way to the cash register and invited to participate
- Interviews lasted approximately 10 minutes
- Shoppers received $10 gift cards to the garden centre for their participation

Results

Choosing a retail outlet

When you want to purchase a garden plant, do you normally come to a garden centre or do you more often shop for garden plants at a grocery store or hardware store?

Garden centre clientele is not the average Canadian plant purchaser

- Like true hobbyists, they shop at stores that specialize in plants
- More likely to be a frequent plant purchaser than the average Canadian plant purchaser

	Garden Center Shoppers	Average Canadian Plant Purchaser*
Shop at garden centers exclusively	64%	31.5%
Shop at both garden centres & grocery/hardware	27%	59%
Purchase 10+ plants per gardening season	50%	35%

*Data from Vineland report titled, "Brief Profile of Canadian Plant Purchasers"

Reason for choosing garden centres

- Decision to shop at garden centers is experience-driven
- Preference for garden centre when seeking bigger commitment/ investment plants
  - Grocery/hardware for annuals

Why a garden centre?	Percentage cited
Large plant selection	36%
Knowledgeable staff	25%
Quality	20%
Shopping for bigger commitment plant	11%
Warranty	9%
Other (convenient location, ambiance, pets allowed, pricing)	14%

Note: Adds up to over 100% as some participants provided more than one reason

Plant type

Before arriving, did you already know specifically which plant you wanted to purchase, in other words, could you tell me what you had in mind when arriving at the store today?

Majority were shopping for nursery plants

- Note the season was mid-September. Proportion of shoppers looking for nursery plants may differ in the spring/summer.

Type of plant	Percentage
Nursery plants	48%
Annuals/indoor potted plants	21%
Plant care products	4%
Not stated	27%

Purchase objectives

Before arriving, did you already know specifically which plant you wanted to purchase, in other words, could you tell me what you had in mind when arriving at the store today?

Pre-determined purchase criteria	Percentage
Species only	23%
Practical traits: size only, long lifespan, hardiness	23%
Aesthetic criteria (e.g. colour, leaf shape) with or without dimensions	21%
Category (e.g. shrub, grass, indoor, planter) with or without other criteria (e.g. size, care requirements)	16%
(species & colour) or (species & size)	11%

Most only had a general target in mind

Note: Does not add up to 100% as other minor combinations of selection criteria are not shown.

Trip planning

Purchase objectives

- When consumers are shopping at garden centres, they have spent time planning for their trip and have concrete intentions
- Arrived with intention to fill a specific spot in their garden
  - All had some idea of what they were looking for, either aesthetic features or dimensions

Opportunity: Categorize plants in the garden centre by size at maturity

Trip planning

Return trips

- For nearly one-quarter it was a second trip for the same purpose
  - Two-thirds of these customers came once to browse and narrow down their selection before returning to make the purchase
  - One-third came back because of product availability
- Further supports that the shopping trip is highly goal-oriented

Results

Impulse purchasing

- Nearly one-quarter of shoppers browsed the store despite already knowing specifically what they wanted to buy
- Only 16% of shoppers made an impulse purchase
  - Approximately 80% of grocery shoppers make an impulse purchase (Nielsen, 2014)
  - **Consider:** Shoppers unlikely to purchase a plant if they don't have a spot for it

Opportunity: Focus on plant care products as candidates for impulse buys

Decision-making

After arriving, how did you go about selecting which plant to buy?

Final decision of which plant to buy is generally made in-store

- Few mentioned growing conditions or hardiness
- 41% of shoppers consulted with staff prior to purchasing a plant
  - Staff have large role to play in keeping warranty costs down

Final purchase decision based on…		Percentage
Dimensions		**34%**
Aesthetics		**32%**
	Colour	20%
	Shape	7%
	Leaf size and shape	5%
Vitality		**31%**
Performance features (light requirements, etc.)		**15%**
Price		**7%**

Price assessment

Did you notice the price before making a decision to purchase? If so, did you do any price comparisons before deciding to purchase this plant?

Price is often an afterthought

- Most stated they noticed the price and made a qualitative judgement that it was "fair"
- Only 30% made a calculated assessment of by comparing price with other plants at the store or at other retailers.

Shoppers who:	Percentage
Didn't notice price	34%
Noticed price but no price comparison	34%
Price comparison	30%
Unknown	2%

How the price was judged?

Standard for comparing price	Percentage
Quality vs price judgement	27%
Felt it was fair/gut feeling (unknown internal reference price)	16%
Price for the same plant in other store	14%
External factors e.g. Price of delivery, warranty, cost of planting	9%
Between different sizes	7%
Price for other plants in the same category	2%
Not specified	41%

Note: Adds up to over 100% as some participants fell into more than one category

Overview

The path to purchase

ID spot that requires a plant → Retail location selection → Go to garden centre → Make purchase

Planning
- Consider dimensions
- General "look" they're going for"
- Some make preliminary trip to GC for inspiration

Choose GC
- Desire high quality for high commitment plants
- Large selection to choose from
- Would like to discuss with staff

Plant selection
- Browse
- Talk to staff
- Choose based on dimensions, colour & vitality
- Price is after-thought

Purchase decision
- Little impulse purchasing

Key takeaways

- **Price is not a major focus**
  - Affords some flexibility in pricing
  - Next phase of research: focus on what consumers would pay a premium for
- **Purchase objective is planned out but decision on which plant fits that objective is almost always made in-store**
  - Decisions are largely based on plant dimensions and aesthetics, not on growing conditions and hardiness. Consider organizing store by plant size.
  - Store staff play a major role in decision-making
    - Influence to purchase correct plant for location and hardier plants to save costs on warranties
- **Impulse purchasing is low**
  - May be because customers won't buy a plant if they don't have a spot for it
  - Focus on plant care products as candidates for impulse purchases

Study 2: Online survey of Canadian & US consumers

Summer 2021

Vineland Research & Innovation Centre

Consumer Insights

Benefits of gardening during COVID-19

Consumer perspectives

- Restrictions on physical movement
- People finding new ways to enrich their daily lives
- Home gardening – a good choice for families
- Gardening as a way to exercise and release stress (Mobilian, 2020)[1]
- Renewed interest in gardening during the quarantine >>> COVID dump of gardening rate in Canada (Wawryk & Nassar, 2020)[2]

[1] Mobilian, J. (2020). Axiom shares 2021 gardening insights survey results. Nursery Management. Available at: https://www.nurserymag.com/article/axiom-releases-2021-gardening-insights-survey/

[2] Wawryk, A., & Nassar, H. M. (2020). More Canadians have tried their hand at gardening amid the COVID-19 pandemic, research finds. CityNews. Available at: https://www.citynews1130.com/2020/10/07/canadians-gardening-home-covid-19/

The impact of COVID-19

Consumer perspectives

- Many new hobby gardeners entered IGCs for the first time (Spirgen, 2020)[3]
- One in five Canadians started a garden in 2020 (Wawryk & Nassar, 2020)[4]
- The new normal for consumers to choose online ordering, delivery, and curbside pickup to get their horticultural products (Spirgen, 2020)[3]

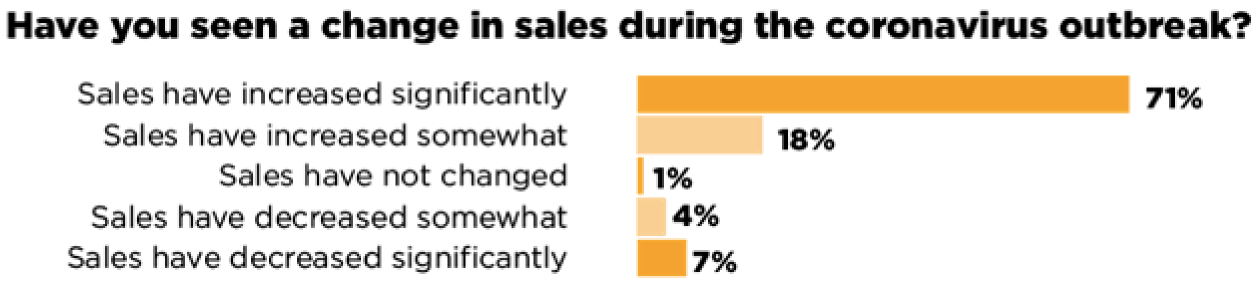
[3] Spirgen, K. (2020). 2020 Vision. Garden Center Magazine. Available at: https://www.gardencentermag.com/article/2020-vision-state-of-the-industry-report-covid-19-coronavirus/

[4] Wawryk, A., & Nassar, H. M. (2020). More Canadians have tried their hand at gardening amid the COVID-19 pandemic, research finds. CityNews. Available at: https://www.citynews1130.com/2020/10/07/canadians-gardening-home-covid-19/

Impact on sales at garden centres

Marketer perspectives

- Compared with the $1.58 billion CAD sales in 2019, the sales of flowers and plants in Canada amounted to approximately $1.68 billion CAD in 2020, reaching the peak in recent ten years[5].
- Most independent garden centre (IGC) owners in the U.S. and Canada reported that quarantine measures had the biggest positive impact on sales in 2020 (Spirgen, 2020)[6].



[5] https://www.statista.com/statistics/485186/sales-of-flowers-and-plants-in-canada

[6] Spirgen, K. (2020). 2020 Vision. Garden Center Magazine. Available at: https://www.gardencentermag.com/article/2020-vision-state-of-the-industry-report-covid-19-coronavirus/

Marketer perspectives

What do some of the IGC owners say? (Spirgen, 2020)[7]

"I think over the next couple of years, people might still be sticking closer to home and therefore still work in their gardens/yards."

"The quarantine era led to a renewed interest in gardening and planting. I hope to keep those new customers involved and interested."

It is crucial for IGC owners to update management and marketing strategies to attract both experienced and new consumers and meet their needs.

[7] Spirgen, K. (2020). 2020 Vision. Garden Center Magazine. Available at: https://www.gardencentermag.com/article/2020-vision-state-of-the-industry-report-covid-19-coronavirus/

The problem

Consumer preferences for plant purchases

Consumers

- Don't know exactly what to buy?
- Need assistance to choose the best plant, based on features, from available alternatives?

Consumers look for recommendations on what plants to purchase for their needs and the different factors to consider in the plants they purchase

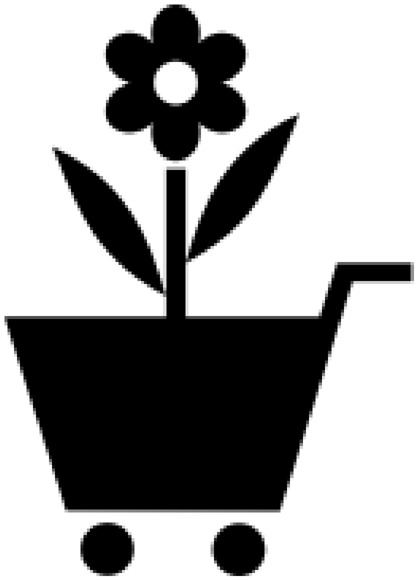
Marketers

- Need to construe consumer preferences for nursery plants
- Require better understanding of the role of pricing in nursery plant purchasing decisions
- Must explore the type of plant features shoppers consider during plant purchases
- Need to understand the role of consumer knowledge and involvement in consumer preferences for plant purchases

Objectives

For outdoor plants,

- Explore the importance of different plant features on plant choice. More specifically, what are the differences between Canadian and the U.S. consumers when it comes to plant feature importance?
- Better understand consumer perceptions of the monetary values of different plant features and feature specificities
- Create consumer segments based on consumer plant choice as well as socio-demographic and psychographic variables
- Examine the role of consumer knowledge and product involvement in the impact of plant features on consumer preferences



Source: https://static.thenounproject.com/png/127813-200.png

Methods

- To explore the importance of different plant features, we used discrete choice experiment, where we selected important plant features and feature levels to create various plant prototypes and ask consumers to indicate their purchase choice.
- Discrete choice Experiments (DCEs) is one of the best-known Stated Preference (SP) approaches for providing estimates of monetary valuation

Elements of Choice Process

- Decision maker ~ Individual, Family/Joint, Firm etc.
- Socio-economic characteristics (e.g. age, gender, education, income)
- Alternatives ~ Choice set (consideration set, evoked set)
- Choice set need to exhibit characteristics
- Mutually Exclusive, and exhaustive, i.e., all possible alternatives are included
- No. of alternatives is finite
- Decision maker selects one and only one alternative from a choice set

- To identify potential segmentation of consumers that show different plant purchase patterns, we performed latent class analysis.

Consumer samples

- **Participants for the online consumer study**
  - Canadian and the U.S. consumers recruited through Decision Point Research and provided informed consent for completing the study
  - 18 years of age or older, and
  - Purchased one or more plants in the past 12 months
- **Timing of the study:** The study was conducted during July-August, 2021
- **Duration of the study:** 20-30 minutes approx. per completed survey
- **Participation incentive:** $5.00 per participant upon qualifying and completing the survey
- **Number of participants:** n=678 (total participants)
  - Daylily-186
  - Geranium-246
  - Hydrangea-246

Plant categories

Online study

Perennial → Daylily

Annual → Geranium

Shrub and Tree → Hydrangea

Plant categories and varieties were selected through industry feedback.

Plant features: Categories

Hedonic vs. utilitarian

- **Hedonic plant features:** Extrinsic attributes associated with the appearance of plants, like flower size, petal colour, flower shape, foliage habit, pollinators attraction, in blossom or not, and plant height, can be categorized as hedonic features,

- **Utilitarian plant features:** Intrinsic features that are related to the maintenance and growth requirements of plants can be classified as utilitarian attributes, such as light preference, pruning requirement, growth rate, hardiness tolerance, bloom time, and bloom period. All these features are inflexible and play a determinant role in a successful planting process.

Plant features

Online consumer study

Daylily

Category	Feature Name	Feature Level	
Hedonic Feature	1. Flower Size	Small	
		Medium	
		Large	
	2. Foliage Habit	Evergreen	
		Semi-evergreen	
		Deciduous	
	3. Number of buds	1-9	
		10-19	
		over 20	
	4. Blossom	Full-blooming	
		Buds and Flowers	
		In buds	
Utilitarian Feature	5. Bloom Time	Spring	
		Summer	
		Fall	
	6. Hardiness Tolerance	-20°C	
		-10°C	
		0°C	
	7. Maintenance	Low	
		Medium	
		High	
	8. Pot Size	1 Quart	$ 6.78
			$ 7.98
			$ 9.18
		1 Gallon	$ 10.75
			$ 12.64
			$ 14.54
		2 Gallon	$ 16.98
			$ 19.97
			$ 22.97

Geranium

Category	Feature Name	Feature Level	
Hedonic Feature	1. Flower Shape	Zonal	
		Regal	
		Scented-leaved	
	2. Container	In the Ground	
		In Pot	
		Hanging Basket	
	3. Pollinators Attraction	No Attraction	
		Attract Butterflies	
		Attract Butterflies and Hummingbirds	
Utilitarian Feature	4. Light Requirement	Full Sun	
		Sun to Part Shade	
		Full Shade	
	5. Growth Rate	Slow	
		Moderate	
		Fast	
	6. Pot Size	4'' pot	$ 4.01
			$ 4.74
			$ 5.45
		6'' pot	$ 5.94
			$ 6.98
			$ 8.03
		8.5'' pot	$ 8.49
			$ 9.99
			$ 11.49

Hydrangea

Category	Feature Name	Feature Level	
Hedonic Feature	1. Look of plant (plant type)	Bigleaf Hydrangea	
		Panicle Hydrangea	
		Oakleaf Hydrangea	
	2. Plant Size	Smallish Shrub	
		Good-sized Shrub	
		Tree	
	3. Flower Color	Only White/Cream	
		Change with Soil pH	
		Combination of two types above	
Utilitarian Feature	4. Pruning Requirement	Low	
		Medium	
		High	
	5. Bloom Period	Short Period	
		Average Period	
		Long Period	
	6. Pot Size	1 Gallon	$ 15.61
			$ 18.37
			$ 21.12
		2 Gallon	$ 32.08
			$ 37.74
			$ 43.40
		5 Gallon	$ 41.06
			$ 48.30
			$ 55.55

Discrete Choice Experiment (DCE)

Questionnaire - Hydrangea

1 Variety

Below are the three most common varieties of hydrangeas. The shapes of flower cluster and foliage are different. The overall appearance and details are shown as following.

2 Plant Size

Hydrangeas can grow as trees and shrubs. Mature size differs depending on the variety.

• *Smallish shrub:* 100-150 cm (40-60'', <5ft)	• *Good-sized Shrub:* 160-210 cm (63-83'', 5-8ft)	• *Tree:* over 250 cm (over 100'', >8ft)

3 Flower Color

Some varieties can change the color of blooms based on the chemistry of the soil. In alkaline soil, the bloom colors are more pink. When grown in acidic soil, the bloom colors are more blue. However, some varieties of hydrangea don't have this ability and can only produce white or cream flowers.

• Pink/Purple/Blue (*Flower color changes depending on soil):*

• *White/Cream flowers:*

4 Pruning Requirement

Pruning hydrangeas helps to keep them healthy and blooming. This feature describes the different degrees of pruning required for hydrangeas.

• *Low:* Pruning is optional.

• *Medium:* Need minimal pruning to clear up damaged/dead material.

• *High:* Pruning is required to promote flowering.

5 Bloom Period

This feature describes how long the hydrangea flower will last.

• *Short Bloom Period:*
Flowers only appear in late spring to early summer.

• *Average Bloom Period:*
Blooming from midsummer to fall.

• *Long Bloom Period:*
Blooming on and on through summer and change color until fall approaches, 3-6 months.

6 Pot Size & Price

The sizes of container that are commonly used by nursery to sell Hydrangeas (see the pic below for a pot size illustration). Prices sold for each pot sizes may vary as below. For example, you may find 1 Gallon size of hydrangea being sold at $15.61, $18.37, and $21.12.

1 Gallon (6-7'' diameter) (15-18cm diameter)	2 Gallon (8.5-9'' diameter) (21.5-23cm diameter)	5 Gallon (10.5-12'' diameter) (26.5-30.5cm diameter)
$15.61	$32.08	$41.06
$18.37	$37.74	$48.30
$21.12	$43.30	$55.55

Discrete Choice Experiment (DCE)

Questionnaire – Hydrangea

Q7.1

	1 Gallon	2 Gallon	5 Gallon
Variety	Oakleaf Hydrangea	Bigleaf Hydrangea	Panicle Hydrangea
Plant Size	Good-sized Shrub	Good-sized Shrub	Smallish Shrub
Flower Color	Combination of White/Cream and Pink/Purple/Blue	White and Cream	Combination of White/Cream and Pink/Purple/Blue
Pruning Requirement	Medium	High	Medium
Bloom Period	Short	Average	Short
Price	$18.37	$32.08	$48.30

Now consider that you are going to purchase only one option among the three provided. Please check-off the option you are most likely to purchase.

- ○ 1 Gallon (1)
- ○ 2 Gallon (8)
- ○ 5 Gallon (9)

Q284 Please tick "yes" if you agree with the following statement:
"Thinking seriously about the 3 pot sizes, I would buy NONE of them."

- ○ Yes (1)
- ○ No (2)

- Every participant was shown one block of choice sets (18 choice sets) randomly and asked to select their favorite alternative in each set.
- An additional question was included to capture consumers' "*Will not buy any*" option.

Consumer knowledge & involvement

Questionnaire

Consumer Knowledge

1. Please rate your abilities as a home gardener.				
A Novice (1)	Little Knowledge (2)	Some Knowledge (3)	Knowledgeable (4)	A Master Gardener (5)
2. When you are shopping for outdoor plants, do you keep in mind your plant hardiness zone?				
Never (1)	Sometimes (2)	About half the time (3)	Most of the time (4)	Always (5)
3. During the most recent gardening season, how many hours per week did you spend gardening?				
I do not garden (1)	1 to 3 hours (2)	4 to 6 hours (3)	7 to 9 hours (4)	More than 10 hours (5)
4. How often do you purchase outdoor plants?				
Not every year (1)	Once a year (2)	Once a season (3)	Once a month (4)	Once a week (5)
5. How many Daylilies have you purchased in the past 5 years?				
0 (1)	1-3 (2)	4-6 (3)	7-9 (4)	10 and more (5)

Consumer Involvement

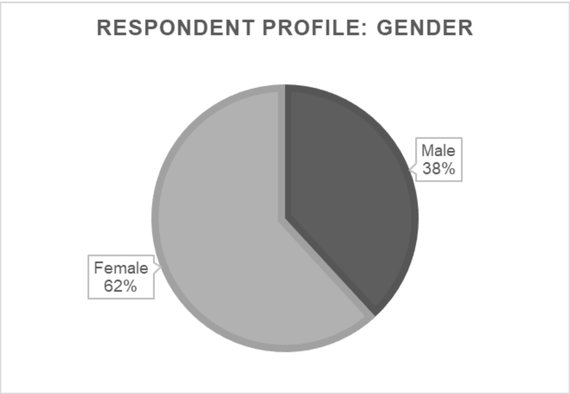
Plant Involvement Scale

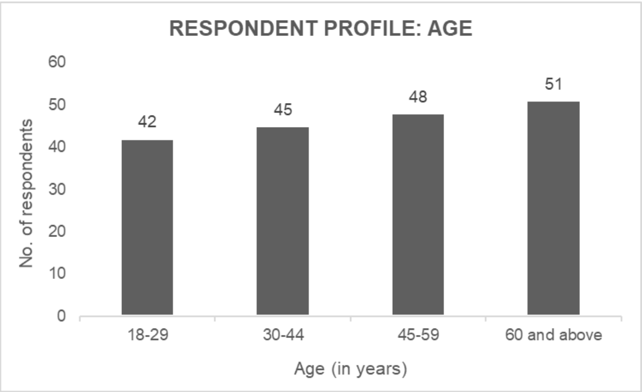
Please indicate the degree of your agreement regarding the statements of following items.
1—Extremely Disagree 2—Disagree 3—Neutral 4—Agree 5—Extremely Agree

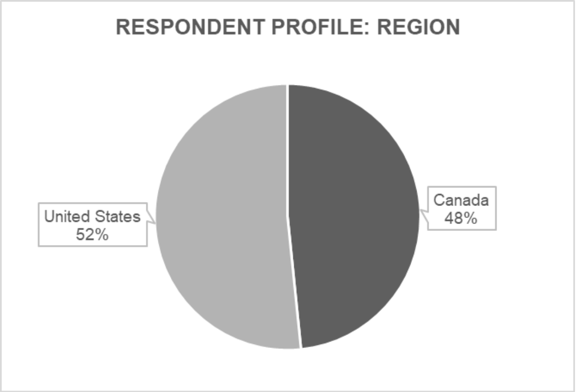
1. I think that garden plants are appealing.
2. I think that garden plants are interesting.
3. I think that garden plants are important.
4. I think that garden plants are exciting.
5. I think that garden plants are of great concern to me.
6. I think that garden plants are fascinating.
7. I think that garden plants are of great importance.
8. I enjoy learning about garden plants.

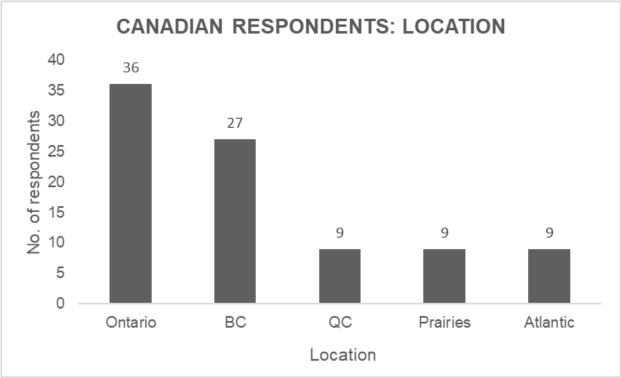
Respondent profile: Daylily

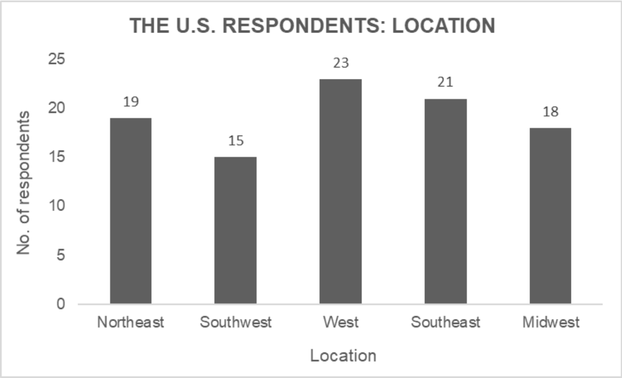
186 consumers





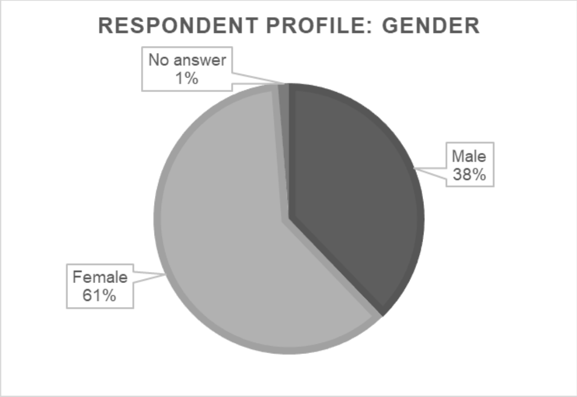


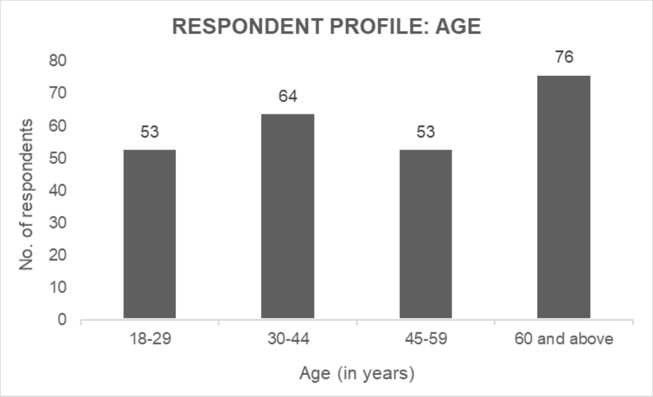


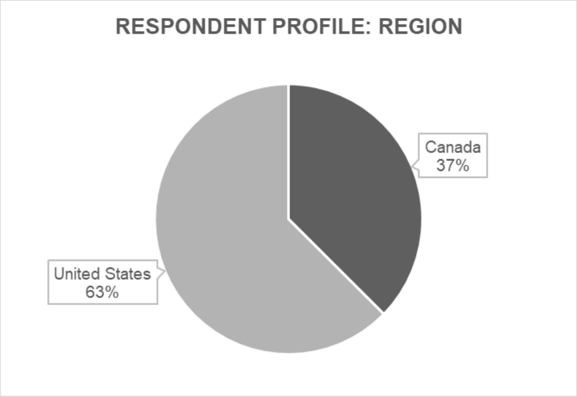


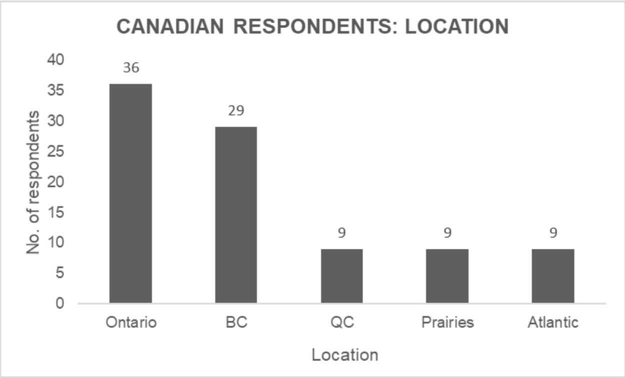
Respondent profile: Geranium

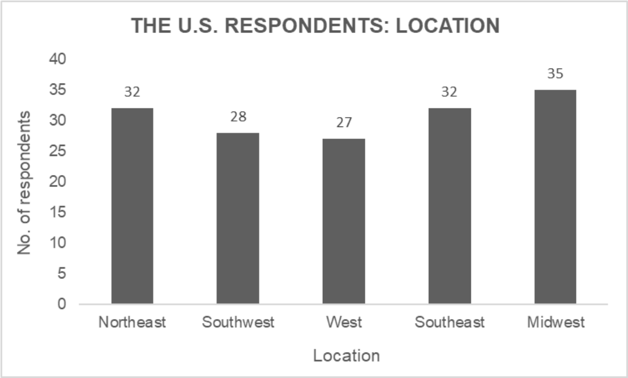
246 consumers





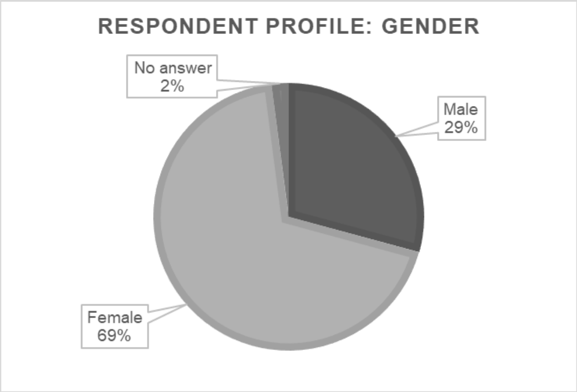


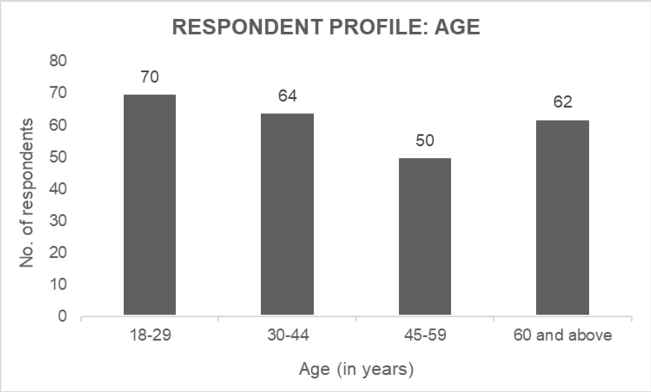


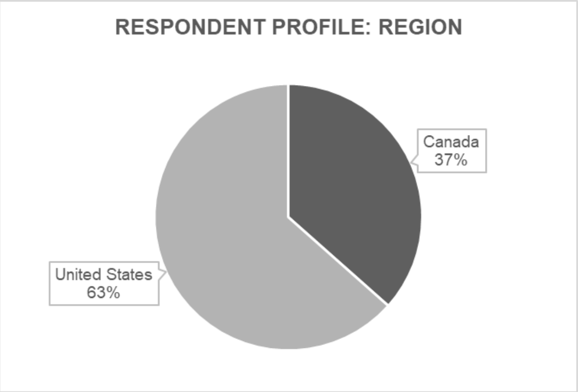


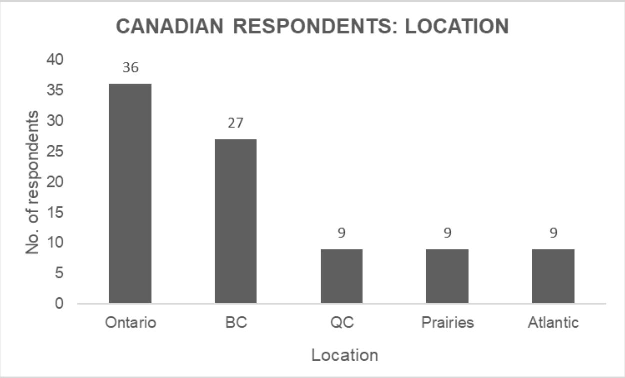
Respondent profile: Hydrangea

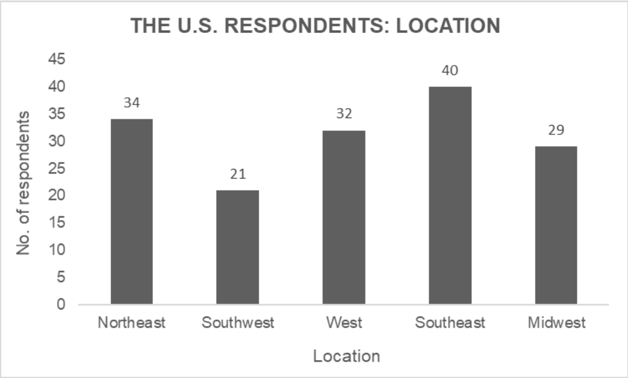
246 consumers











Results: Plant feature importance

Impact on plant choice

Plant features: Attribute importance rank

Rank	Plant Attribute
1	Maintenance (U)
2	Hardiness Tolerance (U)
3	Blossom (H)
4	Bloom Time (U)

Daylily

Rank	Plant Attribute
1	Pot Size (U)
2	Pollinators Attraction (H)
3	Light Requirement (U)
4	Growth Rate (U)
5	Display Method (H)

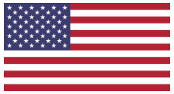
Geranium

Rank	Plant Attribute
1	Bloom Period (U)
2	Flower Colour (H)
3	Plant Size (H)
4	Pruning Requirement (U)

Hydrangea

H: Hedonic plant feature
U: Utilitarian plant feature

Consumer preferences for plant features



Daylily

Category	Feature Name	Feature Importance
Hedonic Features	**Flower Size**	**Large flowers preferred over small ones**
	Foliage Habit	Evergreen preferred over deciduous
	Number of Buds	**No specific preference**
	Blossom	**Buds and flowers preferred over in buds**
Utilitarian Features	Bloom Time	Spring (1) and summer (2) bloom preferred over fall bloom
	Hardiness Tolerance	Higher hardiness tolerance is preferred
	Maintenance	**Low (1) and medium (2) maintenance preferred over high maintenance**
	Pot Size	**Consumers are more sensitive to the prices of 1** and 2 **gallon pots**

Category	Feature Name	Feature Importance
Hedonic Features	**Flower Size**	**Large flowers preferred over small ones**
	Foliage Habit	No specific preference
	Number of Buds	**No specific preference**
	Blossom	**Buds and flowers (1)** and full-blooming (2) **preferred over in buds**
Utilitarian Features	Bloom Time	No specific preference
	Hardiness Tolerance	No specific preference
	Maintenance	**Low (1) and medium (2) maintenance preferred over high maintenance**
	Pot Size	**Consumers are more sensitive to the prices of only 1 gallon pots**

Features in bold are similar between Canada & US consumers

Consumer preferences for plant features

Geranium

Category	Feature Name	Feature Importance
Hedonic Features	Flower Shape	**No specific preference**
	Container	**Consumers prefer in pot displays over in the ground displays**
	Pollinators Attraction	**Consumers are interested in attracting both butterflies and humming birds**, and not just butterflies
Utilitarian Features	Light Requirement	**Full sun preferred over full shade**
	Growth Rate	**Moderate growth rate preferred over slow growth rate**
	Pot Size	**The consumers are quite sensitive to the prices of 8.5" (1) and 6" (2) compared to the 4" pot size**

Category	Feature Name	Feature Importance
Hedonic Features	Flower Shape	**No specific preference**
	Container	**Consumers prefer in pot displays over in the ground displays**
	Pollinators Attraction	**Consumers are interested in attracting both butterflies and humming birds (1)** as well as only butterflies (2)
Utilitarian Features	Light Requirement	Sun to part shade (1) and **full sun (2) preferred over full shade**
	Growth Rate	Both fast and **moderate growth rates preferred over slow growth rate**
	Pot Size	**The consumers are quite sensitive to the prices of 6" (1) and 8.5" (2) compared to the 4" pot size**

Features in bold are similar between Canada & US consumers

Consumer preferences for plant features

Hydrangea

Canada:

Category	Feature Name	Feature Importance
Hedonic Features	**Look of Plant (Plant Type)**	**Big leaf hydrangea preferred over oak leaf hydrangea**
	Plant Size	**Consumers prefer good-sized (1) and smallish (2) shrubs over trees**
	Flower Colour	**Consumers are interested in flower that change colours with soil pH as well as such varieties combined with white/cream hydrangea compared to only white/cream hydrangea**
Utilitarian Features	**Pruning Requirement**	**Low (1) and medium(2) pruning requirement preferred over high pruning requirement**
	Bloom Period	**Long (1) and average (2) bloom period preferred to shorter ones**
	Pot Size	The consumers are quite sensitive to the prices of only 1 gallon pots; surprisingly, the willingness to purchase increases with an increase in price

US:

Category	Feature Name	Feature Importance
Hedonic Features	**Look of Plant (Plant Type)**	**Big leaf hydrangea preferred over oak leaf hydrangea**
	Plant Size	**Consumers prefer good-sized (1) and smallish (2) shrubs over trees**
	Flower Colour	**Consumers are interested in flower that change colours with soil pH and more with such varieties combined with white/cream hydrangea compared to only white/cream hydrangea**
Utilitarian Features	**Pruning Requirement**	**Low (1) and medium(2) pruning requirement preferred over high pruning requirement**
	Bloom Period	**Average (1) and long (2) bloom period preferred to shorter ones**
	Pot Size	The consumers are quite sensitive to the prices of only 5 gallon pots; the willingness to purchase decreases with an increase in price

Features in bold are similar between Canada & US consumers

Results: Monetary value of plant features

Consumer perceptions

Willingness to pay

Daylily

For 1 and 2 gallon pots, the Canadian consumers are willing to pay more for:

1. Higher hardiness tolerance
2. Low and medium maintenance
3. Spring and summer bloom time compared to fall
4. Buds and Flowers compared to in buds

For 1 gallon pots, the U.S. consumers are willing to pay more for:

1. Low and medium maintenance
2. Buds and Flowers and full blooming compared to in buds
3. Large flowers compared to the small ones

Note: With 1 quart daylily, consumers seem to be very insensitive of price, suggesting a potential premium when selling this pot size. In addition, the U.S. consumers are also insensitive to 2 gallon size.

Willingness to pay

Geranium

For 8.5"(1) and 6"(2) pots, the Canadian consumers are willing to pay more for:

1. Attracting both butterflies and humming birds
2. Full sun compared to full shade for light requirement
3. In pot displays compared to in the ground displays
4. Plant varieties with moderate growth rate compared to slow growth rate

For 6"(1) and 8.5"(2) pots, the U.S. consumers are willing to pay more for:

1. Attracting both butterflies and humming birds (1) and only butterflies(2)
2. Sun to part shade (1) and full sun (2) compared full shade for light requirement
3. Fast (1) and moderate (2) growth rates compared to slow growth rate
4. In pot displays compared to in the ground displays

Willingness to pay

Hydrangea

For 1 gallon pots, the Canadian consumers are willing to pay **less** for:

1. Good-sized (1) and smallish shrubs (2) compared to trees
2. Long (1) and average (2) bloom periods compared to short periods
3. Low (1) and medium (1) pruning requirements compared to high requirements

For 5 gallon pots, the U.S. consumers are willing to pay more for:

1. Average (1) and long (2) bloom periods compared to short periods
2. Flowers that change colour with soil pH as well as white/cream hydrangea
3. Low (1) and medium (1) pruning requirements compared to high requirements

Results: Consumer segmentation

Plant choice, socio-demographics, & psychographics

Daylily: Preferred features

Consumer segmentation

Canada	Segment 1	Segment 2	Segment 3
Class size	46%	32%	21%
Preferred features	Large flowers, buds & flowers, fall & summer bloom time, low & high maintenance care	Deciduous & semi-evergreen foliage habit, full-blooming, fall & summer bloom time	Large & medium flowers, 1-9 & over 20 buds, full blooming, fall & spring bloom time, temperature tolerance (0º C, -20º C), maintenance (low, medium & high)

	Segment 1	Segment 2	Segment 3
Class size	39%	38%	23%
Preferred features	Large flowers, buds & flowers, full-blooming, and in buds, fall bloom time, and high maintenance care	Buds & flowers and in buds, fall bloom time, and temperature tolerance (-20º C)	1-9 & over 20 buds, buds & flowers, spring & summer bloom time, temperature tolerance (0º C, -10º C, -20º C), maintenance (low & high)

- Segments obtained: 3-Class Choice Model results obtained using LATENT GOLD CHOICE 4.0
- For daylily, we estimated three consumer segments. In estimations for both Canada and the U.S., the prediction accuracy is > 75%.

Daylily: Consumer segmentation

	Segment 1	Segment 2	Segment 3
Features (ranking)	Maintenance care (1), Blossom (2), Bloom time (3)	Bloom time (1), Foliage habit (2), Blossom (3)	Temperature tolerance (1), Maintenance care (2), No. of buds (3)
Demo. profile	Mostly females, age 30-59 years, married, completed college/university, income (100-200K CAD)	Slightly more males, age 30-44 years, married, completed graduate education, income (50-100K CAD)	Mostly females, age 18-44 years, married, completed college/university, income (50-100K CAD)
Consumer involvement	High	High	Low
Consumer knowledge	Moderate	Moderate	Moderate

	Segment 1	Segment 2	Segment 3
Features (ranking)	Blossom (1), Flower size (2), Bloom time (3)	Blossom (1), Temperature tolerance (2), Bloom time (3)	No. of buds (1), Maintenance care (2), Temperature tolerance (3)
Demo. profile	Mostly females, 45 years & above, married, completed high school/some college/university, income (<25K or 50-100K USD)	Slightly more females, 18-29 and 45-59 years, married, completed high school or college/university, income (50-200K USD)	Mostly females, 45 years & above, married, completed high school or college/university, income (25K - 100K USD)
Consumer involvement	Moderate	Moderate	Equal proportion
Consumer knowledge	Moderate to high	Low	Low

Geranium: Preferred features

Consumer segmentation

Canada	Segment 1	Segment 2	Segment 3
Class size	62%	19%	19%
Preferred features	No pollinator attraction	Zonal flower shape, hanging basket display, attract pollinators (butterflies & humming birds)	Zonal flower shape, all display formats, attract both pollinators (butterflies & humming birds), and all types of light requirements

	Segment 1	Segment 2	Segment 3
Class size	51%	32%	17%
Preferred features	In pot or in the ground and fast growth rate	Hanging basket or in the ground, no pollinator attraction, full sun/shade, growth rate (slow, fast)	Attract both pollinators (butterflies & humming birds), and all growth rates

- Segments obtained: 3-Class Choice Model results obtained using LATENT GOLD CHOICE 4.0
- For geranium, we estimated three consumer segments. In estimations for both Canada and the U.S., the prediction accuracy is >75%.

Geranium: Consumer segmentation

	Segment 1	Segment 2	Segment 3
Features (ranking)	Pollinators attraction (1), Light requirement (2), Display format (3)	Pollinators attraction (1), Flower shape (2), Display format (3)	Display format (1), Light requirement (2), Pollinators attraction (3)
Demo. profile	Age 30-59 years, married, income 50-200K CAD	Mostly males, age>45 years, married, apprenticeship or completed college/university	Mostly females, age 30-44 or >60 years, married, completed college/university, income (50-200K CAD)
Consumer involvement	High	Moderately high	High
Consumer knowledge	Moderate	Moderate	Moderate to high

	Segment 1	Segment 2	Segment 3
Features (ranking)	Display format (1), Growth rate (2), Light requirement (3)	Growth rate (1), Light requirement (2), Display format (3)	Pollinators attraction (1), Growth rate (2)
Demo. profile	Mostly females, age 18-44 years, married, college/university, income 50-100K USD	Mostly females, age>45 years, completed college/university or graduate education, income (25-50K or 100-200K USD)	Mostly females, age>60 years, married, college/university, income 25-100K USD
Consumer involvement	Equal proportion	Moderate	High
Consumer knowledge	Low to moderate	Moderate to high	Equal proportion

Hydrangea: Preferred features

Consumer segmentation

Canada	Segment 1	Segment 2	Segment 3
Class size	53%	25%	22%
Preferred features		All plant sizes, pruning requirement (low, high), blooming period (long, short)	Bigleaf and oakleaf hydrangea, all plant sizes and flower colours, pruning requirement (low, high), blooming period (long, short)

	Segment 1	Segment 2	Segment 3
Class size	75%	15%	10%
Preferred features	Big leaf hydrangea, white & cream hydrangea and a combination of white/ cream and pink/purple/ blue hydrangea, and bloom period (average, long)	All plant sizes and flower colours, pruning requirement (low, high), and bloom period (long, short)	White & cream hydrangea and a combination of white/ cream and pink/purple/ blue hydrangea, pruning requirement (low, high), and bloom period (long, short)

- Segments obtained: 3-Class Choice Model results obtained using LATENT GOLD CHOICE 4.0
- For hydrangea, we estimated three consumer segments. In estimations for both Canada and the U.S., the prediction accuracy is >75%.

Hydrangea: Consumer segmentation

	Segment 1	Segment 2	Segment 3
Features (ranking)	Flower colour (1), Bloom period (2), Plant size (3)	Bloom period (1), Plant size (2), Pruning requirement (3)	Plant size (1), Flower colour (2), Pruning requirement (3)
Demo. profile	Married, completed high school/ college/university, income (25-50K or 100-200K CAD)	Mostly females, age>45 years, married, apprenticeship or completed college/university, income (25-100K CAD)	Mostly females, age 30-44 or >60 years, college/university, income (25-100K CAD)
Consumer involvement	Equal proportion	Equal proportion	Equal proportion
Consumer knowledge	Low to moderate	Low to moderate	Low to moderate

	Segment 1	Segment 2	Segment 3
Features (ranking)	Flower colour (1), Bloom period (2), Variety (3)	Plant size (1), Bloom period (2), Pruning requirement (3)	Bloom period (1), Flower colour (2), Pruning requirement (3)
Demo. profile	Mostly females, age 18-44 years, married, income (25-100K USD)	Mostly females, age 18-29 or >60 years, married, completed high school or some college/university income (25-100K USD)	Mostly females, age 45-59 years, married, college/university income (50-200K USD)
Consumer involvement	Moderate to high	Moderate to high	Moderate to high
Consumer knowledge	Low to moderate	Low	Moderate

Results: Consumer knowledge & involvement

The impact of plant features on consumer preferences

Consumer knowledge & involvement

Daylily

- The Canadian consumers with greater knowledge prefer high maintenance daylilies over the ones that require low or medium maintenance.

For both Canadian and the U.S. consumers, there is no significant role of consumer involvement in the impact of plant features on consumer preferences for daylilies.

- The U.S. consumers with greater knowledge prefer high maintenance daylilies over the ones that require medium maintenance.
- In general, consumers like buds and flowers more than full blooming; however, the consumers with greater knowledge prefer the opposite.
- The general population is indifferent to the no. of buds, but consumers with greater knowledge particularly don't prefer daylilies with 10-19 buds.

Role of consumer knowledge

Geranium

- In general, the Canadian consumers don't have a specific preference for hanging basket containers; however, more knowledgeable consumers have a greater preference for hanging baskets followed by in pot displays.

For both Canadian and the U.S. consumers, there is no significant role of consumer knowledge in the impact of any other plant features on consumer preferences for geranium.

- In general, the U.S. consumers have a preference for in pot displays compared to the ones in the ground; however, more knowledgeable consumers have a dislike for in pot displays followed by hanging baskets.
- In general, consumers are interested in attracting both butterflies and humming birds (1) as well as only butterflies (2); however, more knowledgeable consumers prefer only geranium plants that attract both butterflies and humming birds, and not just butterflies.

Role of consumer involvement

Geranium

- In general, the consumers are interested in attracting both butterflies and humming birds, and not just butterflies.
- However, for Canadian consumers with higher product involvement for geranium purchases, attracting both butterflies and humming birds as well as only butterflies is important.

- In general, the U.S. consumers prefer full sun as the light requirement for geraniums purchased; however, with an increase in their product involvement, their preference for full sun as the light requirement decreases.

For both Canadian and the U.S. consumers, there is no significant role of consumer involvement in the impact of any other plant features on consumer preferences for geranium.

Role of consumer knowledge

Hydrangea

- The consumers with greater knowledge prefer hydrangea with high pruning requirement, and therefore, seek challenges in hydrangea plantation.
- The greater the knowledge, the lesser is the preference for a long bloom period for hydrangea. In fact, these consumers prefer shorter bloom periods.

- For the U.S. consumers, there is no significant role of consumer knowledge in the impact of any plant feature on consumer preferences for hydrangea.

For the Canadian consumers, there is no significant role of consumer knowledge in the impact of any other plant features on consumer preferences for hydrangea.

Role of consumer involvement

Hydrangea

- In general, the consumer preferences for a variety in colour increase with greater consumer involvement.
- The consumers with greater involvement prefer hydrangea with high pruning requirement, and therefore, seek challenges in hydrangea plantation.

- For the U.S. consumers, there is no significant role of consumer involvement in the impact of any plant feature on consumer preferences for hydrangea.

For the Canadian consumers, there is no significant role of consumer involvement in the impact of any other plant features on consumer preferences for hydrangea.

Consumer preferences for plant features

Key takeaways

- **Canadian and the U.S. consumers: A comparison**
  - Quite similar in terms of their preferences for plant features
    - Prefer purchasing plants for immediate decoration
    - Generally, like larger plant sizes, moderate growth rate, longer bloom periods
    - Prefer low and medium maintenance plants
    - Attracting pollinators is important
    - Consider full sun light requirements and prefer colourful varieties
  - Canadian consumers, in particular, give more importance to hardiness tolerance, bloom time, and foliage habit.
  - Consumers in both countries don't have any specific preference for select elements such as flower shape and no. of buds, etc.

Role of price, knowledge & involvement

Key takeaways

- **Willingness to Pay**
  - Generally higher for more utilitarian plant features
  - Canadian consumers, in particular, are willing to pay more for higher hardiness tolerance and specific bloom time.
  - In all other aspects, the Canadian and U.S. consumers have similar preferences.

- **Role of consumer knowledge – more significant for hedonic features**
  - More knowledgeable consumers generally buy outdoor plants for immediate decoration and look out for specific aesthetic elements (e.g., pollinators)
  - More knowledgeable consumers prefer to seek challenges (e.g., high maintenance plants, high pruning requirements).

- **Role of consumer involvement is limited**
  - Utilitarian features' (e.g., light and pruning requirements) impact on consumer preferences
  - Hedonic features (e.g., pollinators and variety in colours of flowers) become more important with greater consumer involvement

Marketers/retailers need to identify and target their message based on a combination of factors valued by a consumer segment.

Study 3: In-store vs Online Experience

Summer 2021

Vineland Research & Innovation Centre

Consumer Insights

Objective

Capture the salient aspects of consumer plant purchases to:

1) Better understand the impact of the COVID-19 pandemic on plant shopping behaviour

2) Explore the factors consumers value the most in their plant shopping experiences (in-store vs. online)

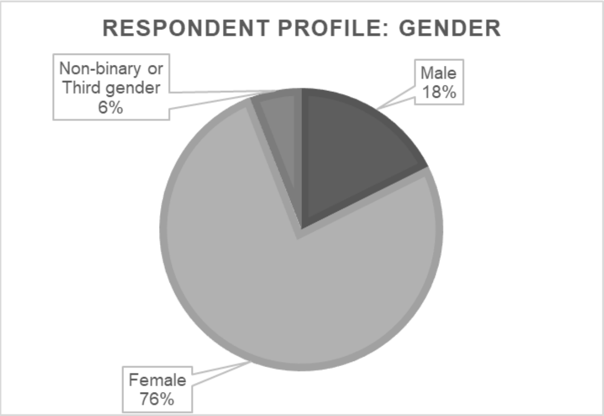
3) Identify and rank garden centre attributes based on consumer perspectives

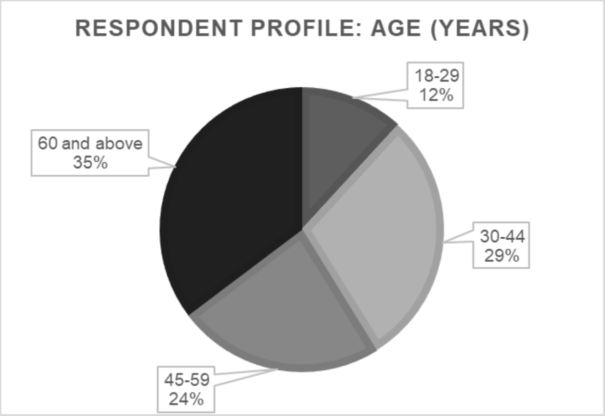
Methods

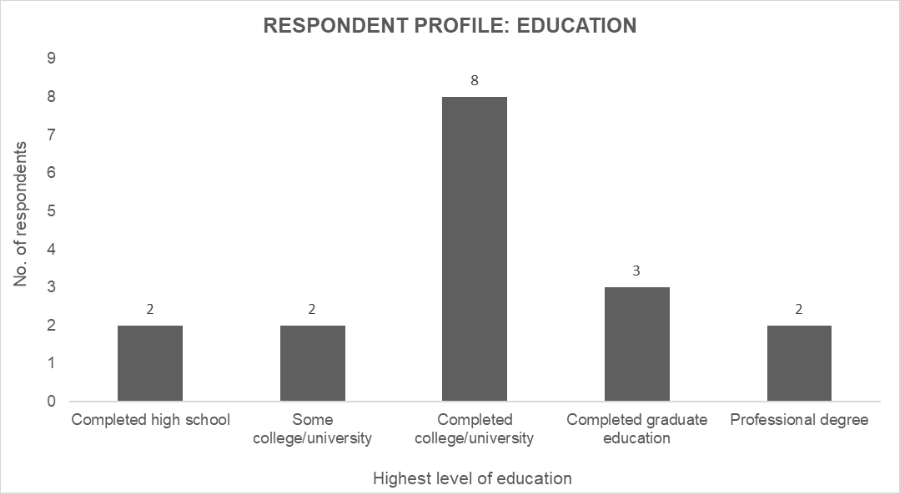
- **Nature of research:** Qualitative; 17 shopper intercept interviews were conducted by Vineland researchers in August, 2021
- **Location:** 3 garden centre locations in Southern Ontario, Canada
- **Timing:** All interviews were conducted in August, 2021
- **In-store interviews:** Shoppers were intercepted on their way to the cash register and invited to participate
- **Interview duration:** 10-15 minutes per participant
- **Participation Incentive:** One $10 gift card to the garden centre given to each participant who completed the study

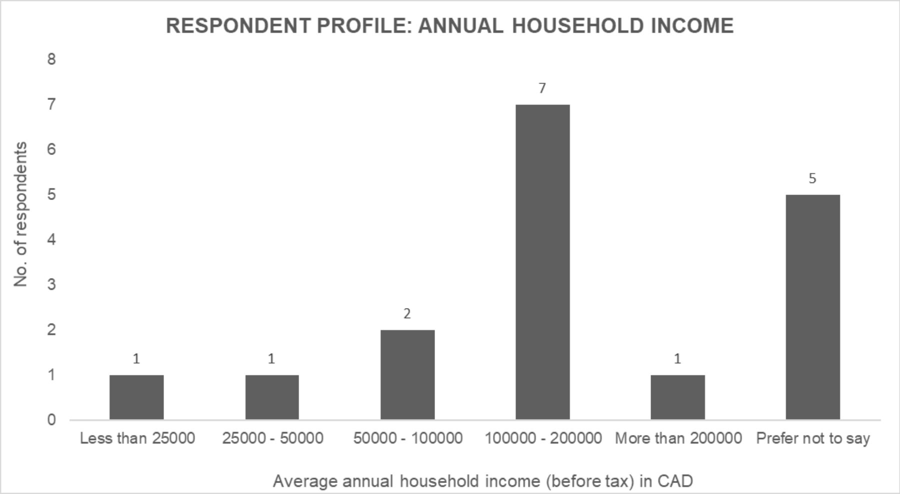
Participant profile

Total number of participants (n=17)



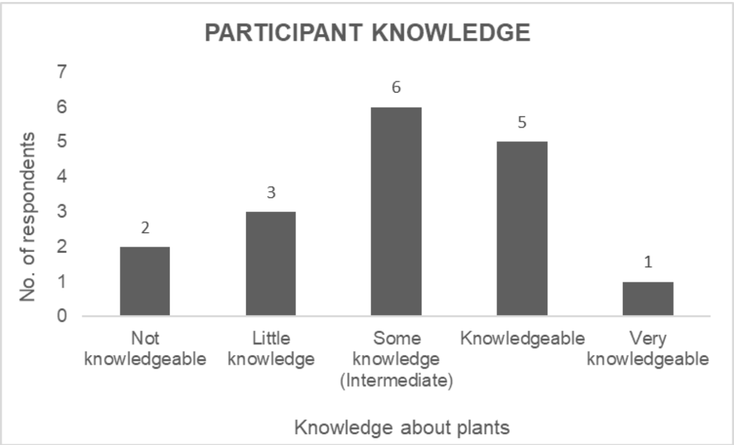


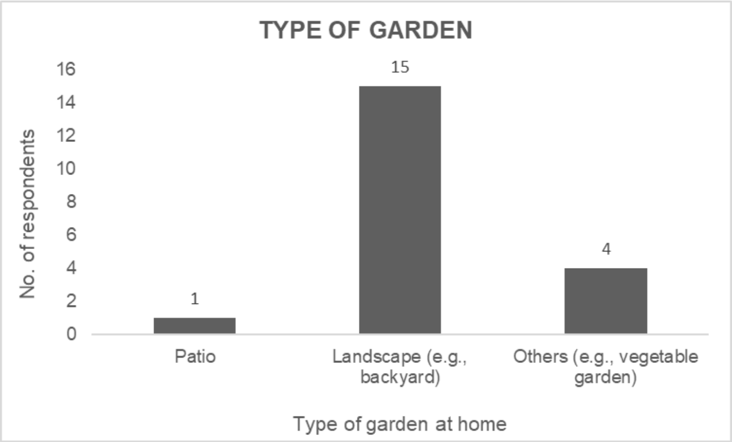




Participant characteristics

Total number of participants (n=17)





Results

Results are from a qualitative study, due to small sample size results are considered trends

Set up at Garden Centre for customer intercept

The impact of COVID-19 pandemic

Summary of results

The impact of COVID-19 on plant shopping

Plants never purchased before vs. Repeat purchases

Has the pandemic impacted your plant purchase habits? If yes, how?	
Plants never purchased before (New purchases)	**Plants purchased earlier (Repeat purchases)**
• No change in new purchases **(53%)**	• No change in repeat purchases **(47%)**
• Consumers are buying more plants in bulk, esp. after the lockdown; more time and money available for plant shopping and gardening **(41%)**. Some people do online shopping and prefer curbside pickup. For new plant purchases, all consumers (**100%**) prefer to buy them in store.	• Consumers are buying more plants in bulk to limit the no. of trips to garden centres, and have more time and money for plant shopping and gardening. For repeat plant purchases, **82%** consumers shopped in-store, **12%** mostly in-store and sometimes online, and **6%** had no specific preference.
• Only **18%** consumers reported buying fewer plants, esp. during the first lockdown.	• For repeat purchases, only **12%** consumers reported buying fewer plants.
	• Only **12%** consumers reported making repeat purchases online and preferring curbside pickup

In-store shopping experience

Summary of results

Understanding the shopping experiences

In-store plant purchases

Which aspects of in-store shopping experience do you care the most about?

- **About plants:**
  1. Being able to see the plants is most important (**94%**)
  2. Inspecting plants and getting a sense of plant's health (**24%**)
  3. Touch and feel (**6%**), plant hardiness (**6%**), and comparison with other plants (**6%**)

- **About the garden centre:**
  1. Customer service and staff help/advice is most important (**94%**), esp. for plants that consumers never purchased before
  2. Ambience, layout and organization of garden centres, i.e., grouping of plants (**53%**)
  3. Easy product search, plant choice (features, variety) and available selection (**41%**)
  4. Product labels/tags and plant description (**12%**)
  5. Overall experience; being able to walk around and see different plants (**12%**)

Understanding the shopping experiences

In-store plant purchases

Which aspects of in-store shopping experience do you value the most?

- **Shopping process:**
  1. Customer service and staff support/help/advice (**77%**)
  2. Overall shopping experience (**77%**) and be able to walk around, see and compare plants (**65%**)
  3. Guarantee/warranty and easy returns (**77%**); however for some consumers, warranty is not important (**12%**)
  4. Store location (**18%**), i.e., proximity to home and convenience (**12%**)
  5. Flyers (**6%**), plant variety (**6%**), layout and organization of garden centres (**6%**)

- **Willingness to pay more for:**
  1. Easy returns (**24%**) and warranty, esp. for bigger plants and trees (**18%**)
  2. Customer service and staff help/support available (**12%**)
  3. To be able to move around, see and inspect plants (**12%**)

Understanding the shopping experiences

In-store plant purchases

What are some of the biggest challenges of in-store plant shopping?

1. Restrictions due to COVID-19 (**29%**) such as limited access and less support staff
2. Difficulty in product search, limited inventory and product availability (**24%**)
3. More waiting time, esp. during COVID-19 (**12%**)
4. Too many options seem overwhelming (**6%**), shopping with small kids is challenging (**6%**), and problems with store cleanliness (**6%**)

Online shopping experience

Summary of results

Source: https://www.greenhousegrower.com/management/the-latest-on-amazons-online-plant-store/

Understanding the shopping experiences

Online plant purchases

Which aspects of online shopping experience do you care the most about?

- **About plants:**
  1. Plant photos, descriptions, quality and care instructions are most important for online shoppers (**88%**)
- **About the website:**
  1. Overall convenience due to easy product search, no commuting requirements, etc. are most important aspects (**47%**)
  2. Easy product and price comparisons (**12%**)
  3. General information about the garden centre and staff advice/support (**12%**)
  4. Site layout and organization (**6%**)
  5. Inventory updates (**6%**)
  6. Product guarantee/warranty (**6%**) and efficient return policy (**6%**)

Understanding the shopping experiences

Online plant purchases

Which aspects of online shopping experience do you value the most?

- **Shopping process:**
  1. Overall convenience of shopping (**59%**) from home 24x7, no driving, time savings
  2. Guarantee/warranty, easy returns, and product exchange (**41%**)
  3. Plant photos, description, care instructions, and general information (**12%**)
  4. Easy product search online (**12%**), product comparison (**6%**) and inventory updates (**6%**)

- **Willingness to pay more for:**
  1. Easy returns and warranty (**12%**)
  2. Customer service (including videos and live chat features) and staff help/support available (**12%**)
  3. Overall convenience (**6%**) and availability of native plants (**6%**)

Understanding the shopping experiences

Online plant purchases

What are some of the biggest challenges of online plant shopping?

1. Not being able to see and/or inspect the plants and understand their dimensions (**71%**)
2. No photos of actual plants (**29%**); only stock photos are displayed online
3. Internet skills and resistance to online plant shopping (**24%**)
4. Lack of staff advice and help/support available (**18%**)
5. Limited product availability (**6%**) and missing information (**6%**)
6. Missing the overall experience of shopping as an activity (**6%**)
7. Problems in returning curbside plant purchases (**6%**)

Garden centre attributes

Summary of results

Source: https://live.staticflickr.com/1728/28559463668_de2b64de7c_b.jpg

Garden centre attributes

Buying outdoor plants in store

About Garden Centre (GC)	I actively look for a garden centre with this attribute and it's very important to me	A good attribute to have in a garden centre, but not a priority for me	I don't look for a garden centre with this attribute and it's not important to me
1. Plant variety offered by a GC	10 (**67%**)	5 (**33%**)	0 (**0%**)
2. Personalized advice from the GC employees	9 (**60%**)	6 (**40%**)	0 (**0%**)
2. Deals, offers and promotions	9 (**60%**)	6 (**40%**)	0 (**0%**)
3. Additional services (e.g., landscaping design) provided by a GC	6 (**40%**)	6 (**40%**)	3 (**20%**)
4. Events and activities organized by a GC	2 (**13%**)	7 (**47%**)	6 (**40%**)
4. Online shopping and services (e.g., gardening tips) provided by a GC	2 (**13%**)	7 (**47%**)	6 (**40%**)

Pandemic impact on shopping behaviour

Key takeaways

- ~50% consumers are buying plants in bulk
- Shoppers are spending more time and money on plant purchases
- In-store shopping preferred by 100% consumers for plants never purchased before and by 82% consumers for repeat plant purchases
    - Data collected at independent garden centers

Factors influencing plant purchases

Key takeaways

- **In-store plant purchases**
  1. Being able to see the plants, good customer service, and staff help/advice
  2. Overall shopping experience, guarantee/warranty and easy returns
  3. Organization and layout of garden centres
  4. Biggest challenges: COVID-19 restrictions, limited inventory & product availability
- **Online plant purchases**
  1. Plant photos, descriptions, care instructions and overall convenience
  2. Guarantee/Warranty, easy returns, and product exchange
  3. Biggest challenges: Consumers can't see plants or understand the dimensions

Consumers are willing to pay more for product warranty and easy returns, both in store and online.

Consumer perspectives on garden centre

Key takeaways

- **Top '3' garden centre attributes**

  1. Plant variety offered by garden centres; large plant selection is preferred by consumers
  2. Personalized advice available from the garden centre employees
  3. **Deals, offers and promotions** – new factor emerging in the later stages of post COVID scenario.

Summary & Recommendations

How to apply to your business

Vineland Research & Innovation Centre

Consumer Insights

Price Valuation

How to apply to your business

- Consumers are not price sensitive and are willing to pay more for features they value. Consider organizing your store based on features that consumers in your area desire.
  - If you are in a colder climate, advertise hardiness zones instead by temperatures ranges to be more consumer friendly
  - Create signage that advertises low care and maintenance
  - Create areas for novice and expert plant purchases as gardening knowledge can impact plant choices and price sensitivity
  - Highlight bloom period
  - Cluster plants together with similar features such as colour or pot size
  - Focus on unique aspects that to create value such as “attracts butterflies and hummingbird”

Impulse buying

How to apply to your business

- Most consumers come into the store for a specific purpose, mainly to find a plant to fit a desired location in their home/ garden. Just because plant impulse purchases are low does not mean that consumers won't pick up items to care for their new plant. Organize your store so that consumers pick up items that they need to care for their new purchase where they find the plant, not in separate section.
  - Does a plant need pruning, have pruning shears at the ready
  - Does a plant need specific nutrients, keep plant supplements handy and within reach for a convenient add-on
  - Be creative, create plant kits so consumers can pick up a box with all their plant care needs to nurture their green thumb and new purchase

Container size matters

How to apply to your business

- Container (pot) size impacts how consumer value plant purchases. Consumer are more price sensitive to certain pot sizes than others. While this is plant type specific, it is very useful knowledge for inventory management and pricing.
  - Stock more inventory in pot sizes to which that consumers are less price sensitive, this could lead to a larger profit margin
  - Pricing of plants should not be linear but instead related to their price sensitivity. If consumer are willing to pay more for a 4" vs 8" pot build a large profit margin into the 4" format

Create an inviting culture

How to apply to your business

- The number one reason consumers shop in store is because of the customer service and being able to interact directly with the staff and the products/plants. Whether you are in-store, online or curbside the garden centre staff are an asset, invest in your customer service. Consumers value their knowledge and advice and are willing to pay more for the confidence in their purchase. Invest in staff training and education so that no matter the shopping format they can be advocates for your business and be a reason why consumers don't want to shop anywhere else and don't pay (as much) attention to price.

Research team

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GARDEN CENTRES CANADA

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Canadian Nursery Landscape Association
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Thank you

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