



# US Consumer Sentiment toward Floral Products: Wave 3 July 2020

PMA's consumer sentiment research provides insight into how the COVID-19 pandemic is impacting consumer shopping trends for floral. This is directional information to guide PMA and its members with their messaging to consumers.

## Floral Purchases May 2020 versus July 2020



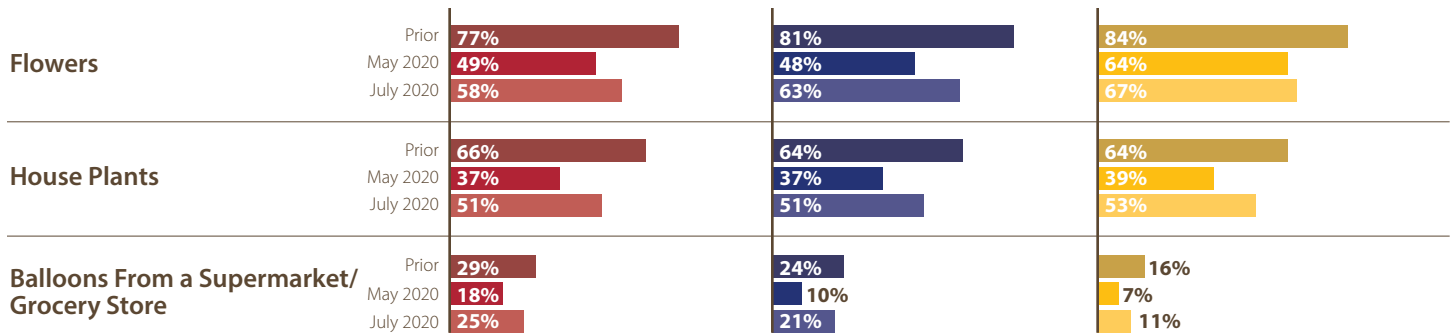
US



UK



Germany



The floral market across all three regions rebounded nicely from the early days of the COVID-19 pandemic.

## Cut Flowers

The overall percent of consumers reporting that they purchased cut flowers is still down from before the outbreak. On average 18 percent less consumers reported they purchased cut flowers in the July study than prior to the outbreak.

- The US appears to have more fluctuation in consumers purchasing of cut flowers than the UK and Germany. The UK seems to be in the midst of their rebound while Germany's cut flower market appears more stable.

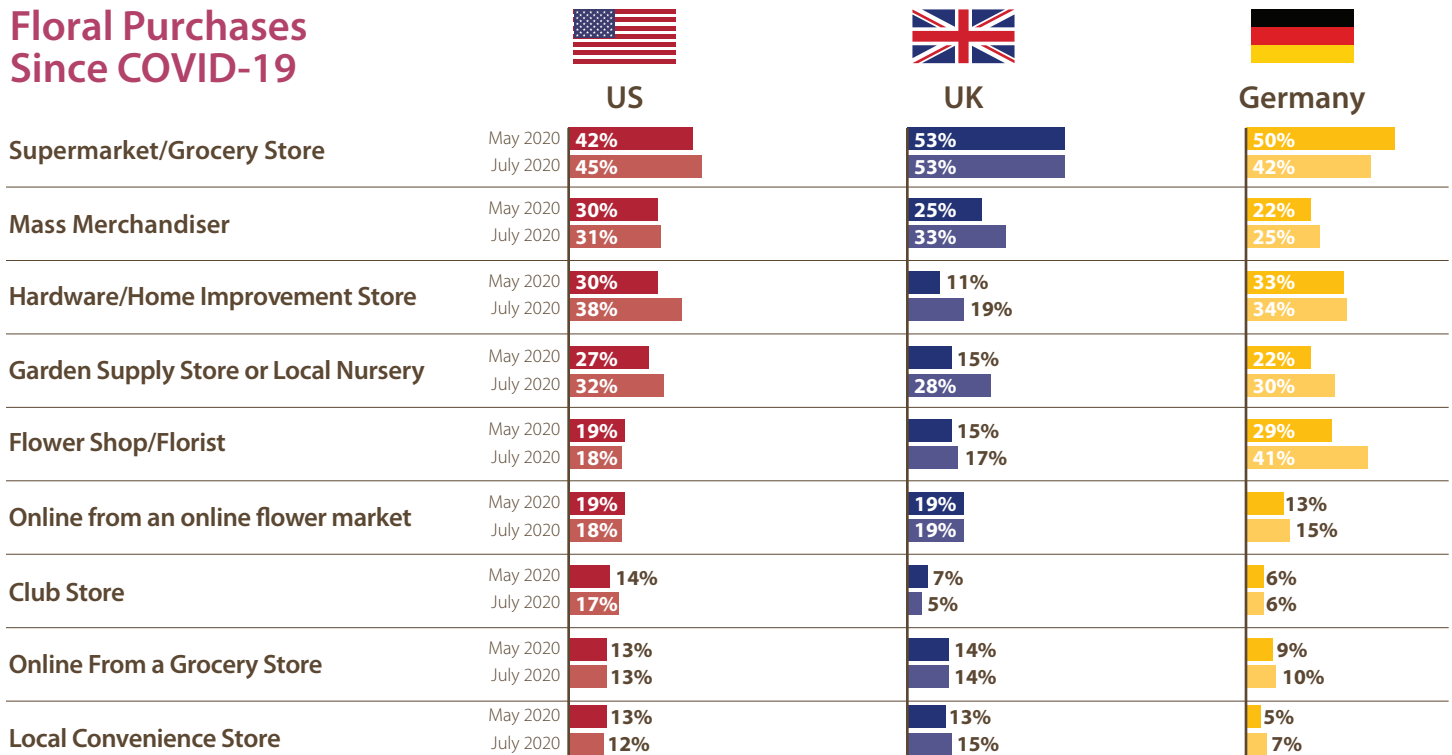
## House Plants and Balloons

The US and Germany seem to be experiencing a stabilization in the house plant and balloon categories while the UK still appears to be experiencing growth in the balloon category.

- The percent of consumers reporting that they purchased house plants in the July study is down by 13 percent when comparing it to the percent of consumer who indicated they purchased house plants prior to the outbreak.
- The rebound in balloons is most impressive with a decline on average of 4 percent of consumers reporting they purchased balloons in the July study from prior the outbreak.



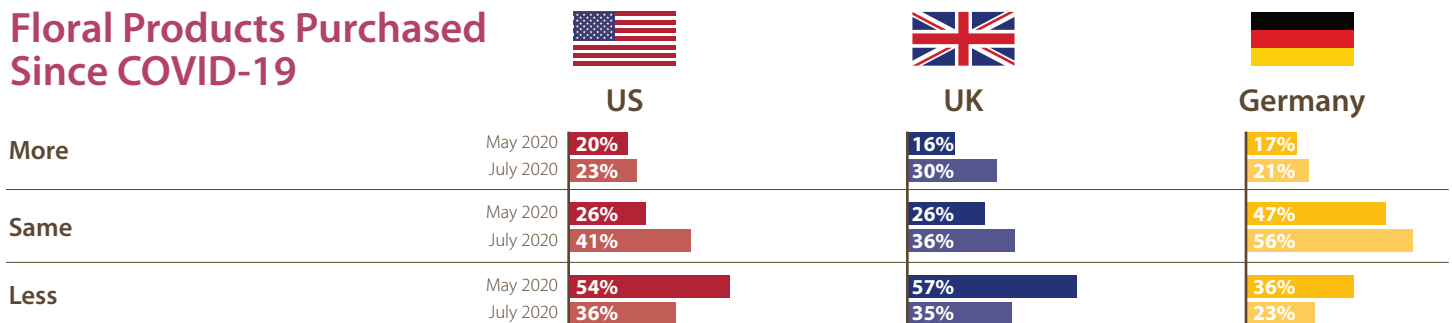
## Floral Purchases Since COVID-19



There is a consistency among consumers regarding where they purchase their floral products with 46 percent on average purchasing from supermarkets and 30 percent on average purchasing from mass merchandisers.

- Garden supply stores or local nurseries in the UK continue to benefit from consumers focusing on gardening during the pandemic

## Floral Products Purchased Since COVID-19

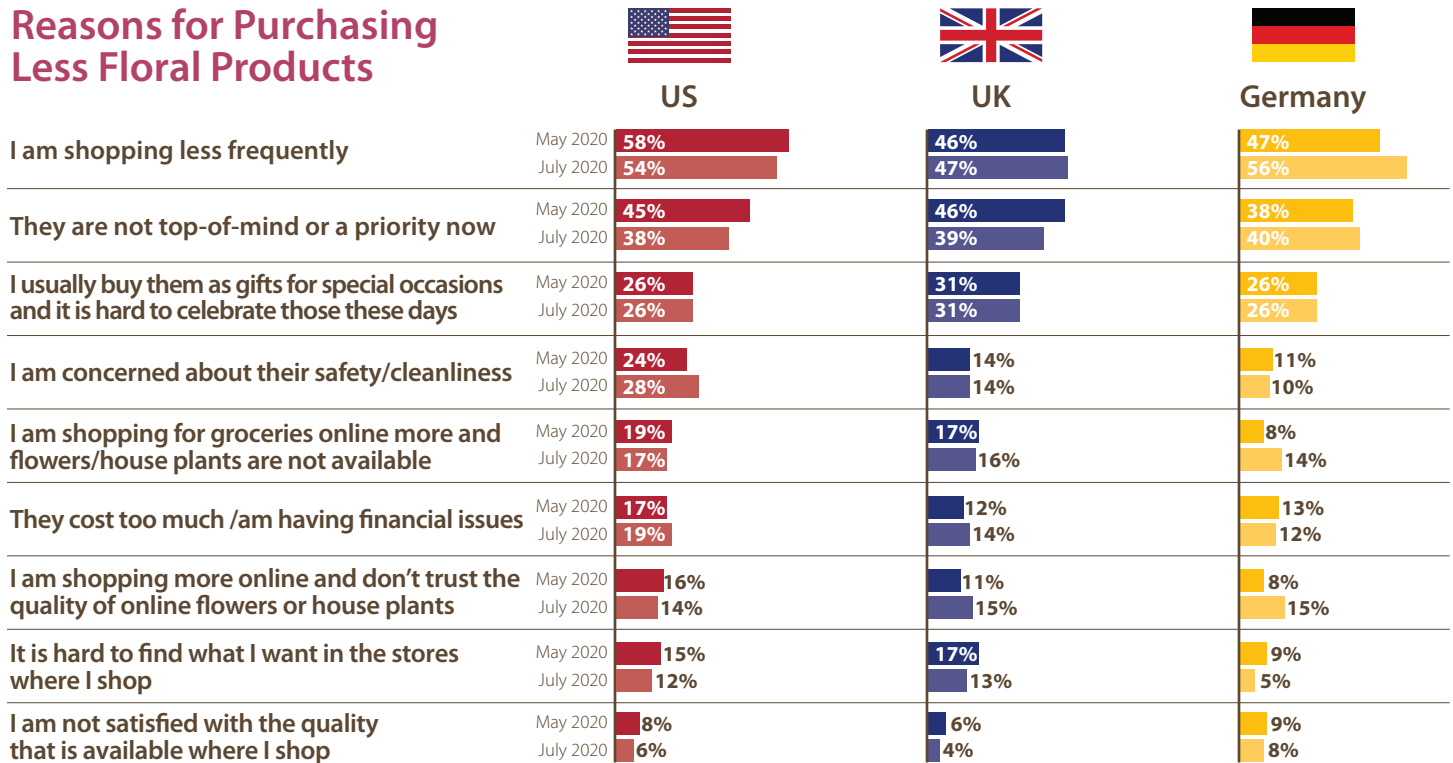


The floral market rebound is reflected in the downward tick of consumers reporting they intend to purchase less floral products. This is seen across all three regions.

- The data reflects the greatest market stabilization in Germany with over 55% of consumers reporting they intend to purchase the same amount of floral products in the July research study.



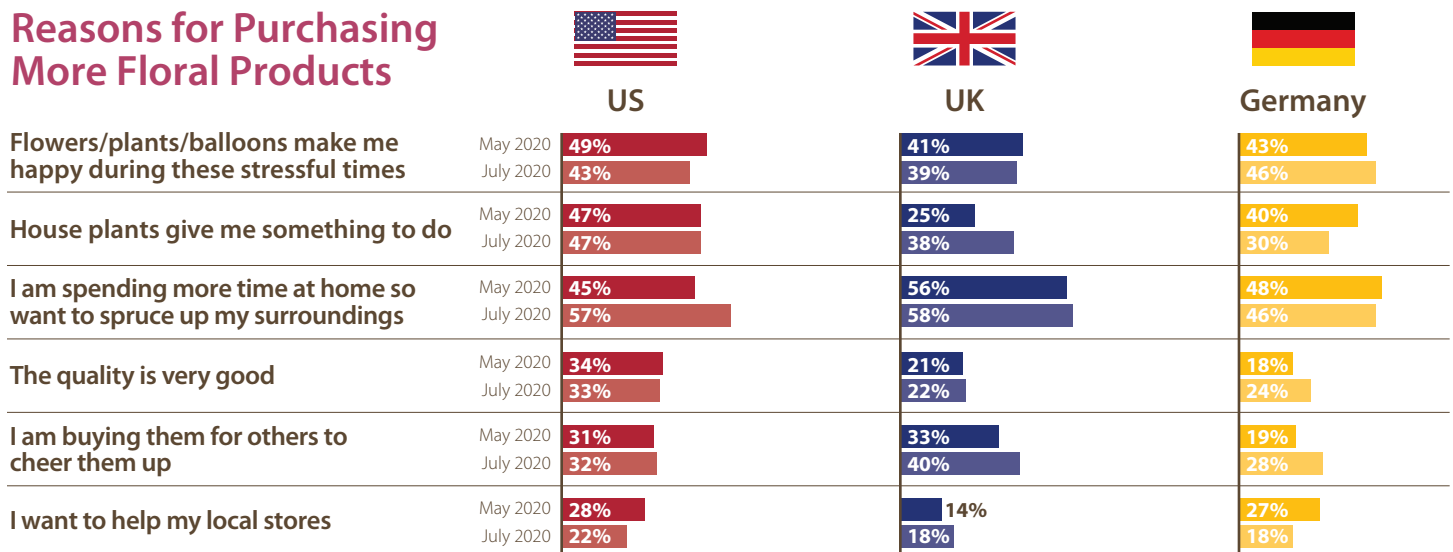
## Reasons for Purchasing Less Floral Products



While the main reasons for purchasing less floral products across all three regions is shopping less frequently and flowers not being top mind, there are upticks in other factors.

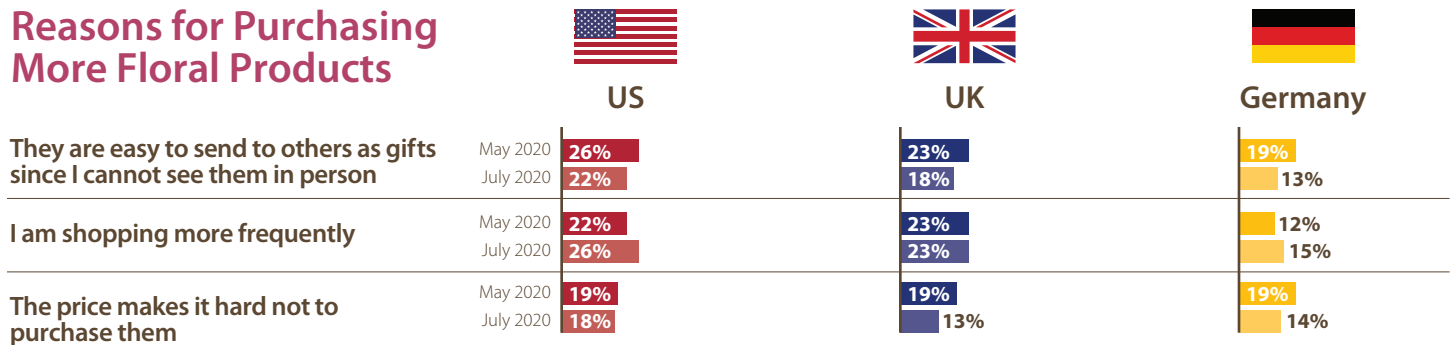
- In the US where COVID-19 is experiencing rapid spread and having grave effects on the economy, there is an uptick in those concerned about the safety/cleanliness of flowers and the cost of flowers.
- In Germany there is an uptick in consumers shopping online for groceries and a concern about the quality of flowers purchased online.

## Reasons for Purchasing More Floral Products





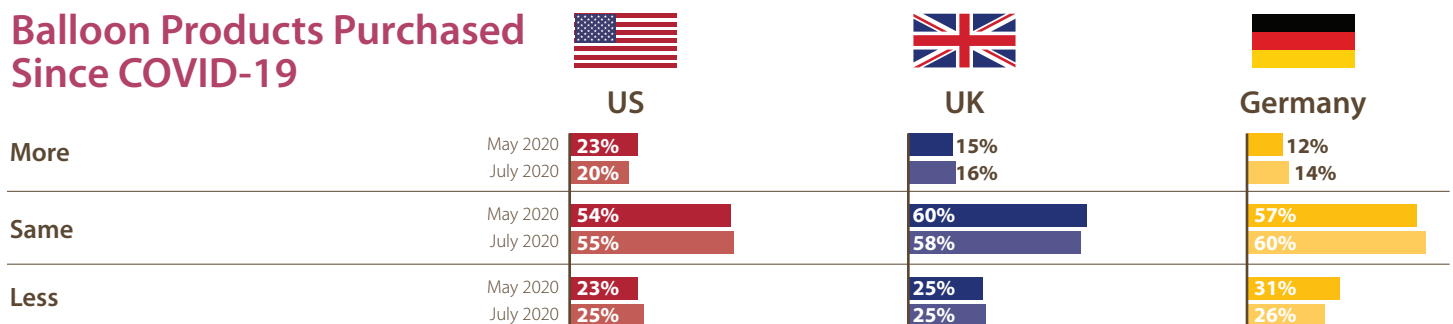
## Reasons for Purchasing More Floral Products



Floral products make me happy, I am spending more time at home, and house plants give me something to do have been the main reasons for purchasing floral products throughout COVID 19, although:

- In the US there is an uptick in consumers shopping more frequently.
- In the UK and Germany more consumers are reporting that they are purchasing floral products for other to cheer them up.

## Balloon Products Purchased Since COVID-19



Consumers' intentions about purchasing balloons has been consistent throughout COVID 19. In July, the percent of consumers in Germany who intend to purchase less balloons decreased to mirror the US and UK.

## Place of Purchase

The location of purchases of floral products has stabilized across all three regions for supermarkets, mass merchandisers and club stores.

- Over 70 percent of consumers expect to purchase the same or more floral products in supermarkets in all three regions.
- In Germany there is an uptick in consumers expecting to purchase more floral products from flower shops and garden supply stores.

Methodology: Source: Wave 3 data was collected July 1-7 in the US, UK and Germany. IPSOS N = 500 in each country. Research conducted among 500 respondents in each country, age 18+ who purchased floral products prior to the COVID 19 crisis.