



Keeping the customer happy: What they notice, what they don't and why it matters

Alexandra Grygorczyk



Vineland Research and Innovation Centre

A results-based, independent, not-for-profit organization focused on horticultural science and innovation



Research areas

Horticultural
Production
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Consumer Insights





Consumer Insights

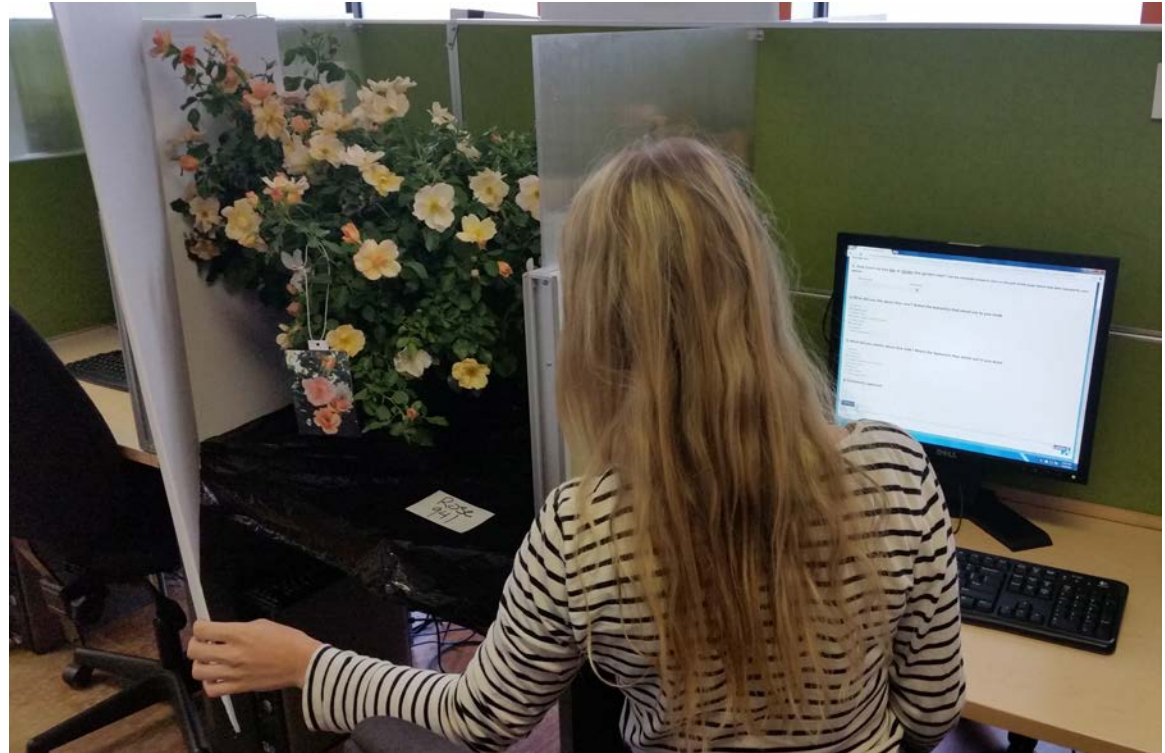
Putting consumer intelligence to work for horticulture



Ornamentals consumer research

Consumer research on
ornamentals since 2012

- Canadian Hardy Roses
- Ethnic flowers
- Edible ornamentals
- Edible flowers



Today's presentation

- Profile of the Canadian gardener
- Plant features that stand out
- Long-term satisfaction



How are Canadians gardening?

Canadian gardener profile

- 3 out of 4 Canadians keep a garden (n=904)
- Landscape gardens still dominate
 - > 70% have landscape garden
 - 55% have a patio or balcony garden

Garden type	Percentage
Landscape	44.7%
Patio+Landscape	19.3%
Patio	12.7%
Balcony	12.2%
Other combinations of above options	11.1%
	100.0%

What are they planting?

Canadian gardener profile

- Majority are planting perennials (n=575)
 - Compared to general population, more Asian-Canadians keep only annuals (42% vs. 32%)
- 57% dedicate a portion of their garden to edibles (n=400)
 - Younger more likely to keep edibles (65% vs. 51%)

Garden type	Percentage
Mostly or only perennials	54%
Mostly or only annuals	32%
Approximately even split	14%
	100.0%



Where are they shopping?

Canadian gardener profile

- Majority are purchasing at garden centres and hardware stores
 - Big box stores ~60%
- Asian Canadians more likely to shop at hardware store (40%) than garden centre (19%)

Where do you obtain the majority of your plants?	Percentage
Hardware store	31.8%
Independent garden centre	31.5%
Grocery store	15.6%
Mass merchandiser (e.g. Walmart, Costco)	11.8%
Other (family/friends, farmer's market, online)	9.3%
	100.0%



Gardening knowledge

Canadian gardener profile

- Asked gardeners (n=511) 8 basic plant care questions
- Here are a few examples...



Sample knowledge questions

Canadian gardener profile

When is the ideal time to plant spring-blooming bulbs (e.g. tulips, daffodils, crocuses)?

Autumn	51%
Spring	21%
I don't know	17%
Early summer	7%
Late summer	4%



Sample knowledge questions

Canadian gardener profile

When pruning bushes or shrubs, it is best to cut:

Just above the node	50%
I don't know	32%
Just below the node	10%
At the same level as the node	8%



Sample knowledge questions

Canadian gardener profile

When shopping for outdoor garden plants, do you keep in mind your plant hardiness zone? What is your plant hardiness zone?

- Marked correct if answered with anything in the format 1-8 or 1a-8b or made mention of a map
- Only 21% knew what a plant hardiness zone was



Gardening knowledge

Canadian gardener profile

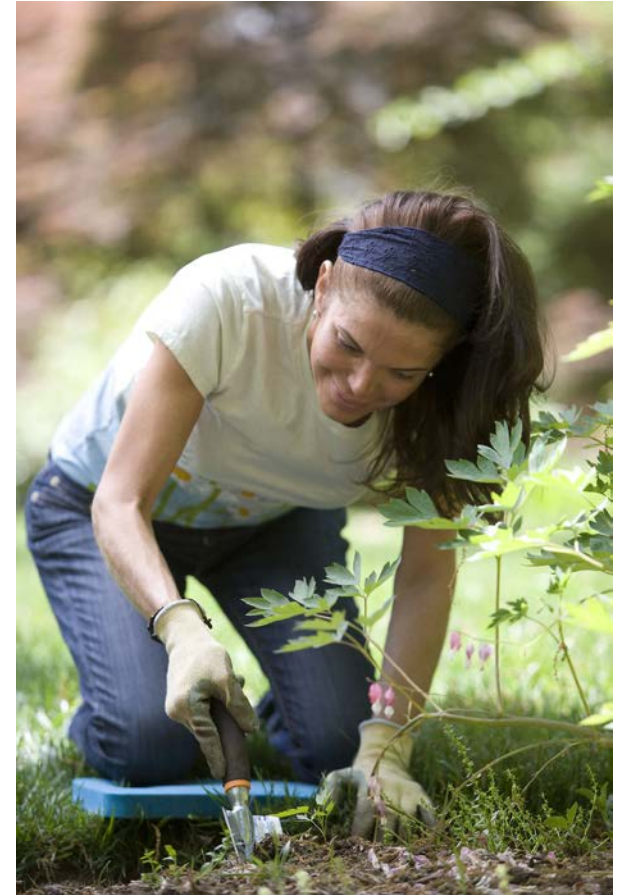
- Most gardeners have limited plant care knowledge
 - 72% had only low or moderate gardening knowledge
 - Answered 3 or fewer questions correctly



Why do they garden?

Canadian gardener profile

- They're not just gardening because they have to, they enjoy it (n=211)
 - 81% say they garden because it's enjoyable
- Keep this in mind for marketing
 - Marketing doesn't have to be pragmatic
 - Also, recall: enjoyment ≠ knowledge



What do consumers notice?

Note: Unless otherwise mentioned, the following information is based on our research in roses



Colour

What consumers notice

- Colour
 - Bright, vibrant is most important
 - Colour categories differ in “shade tolerance”



Colour category vs shade

What consumers notice

Top rose colour categories



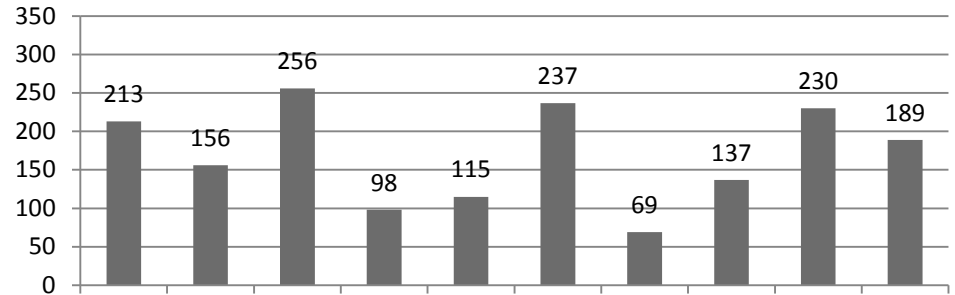
Top rose colour shades



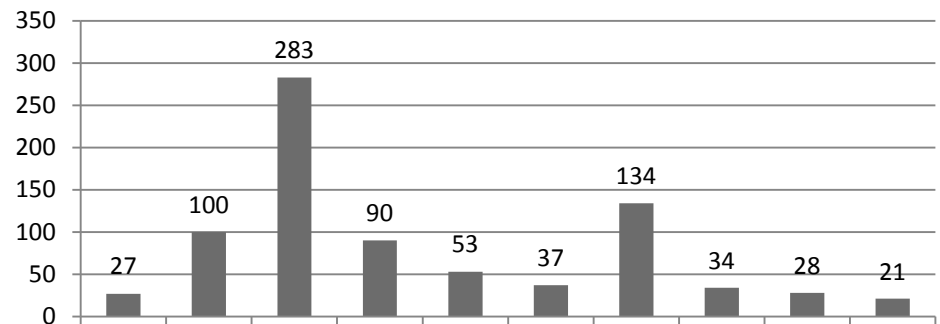
Shade tolerance

- Reds are low risk, generally liked (winning team)

Red (total=1700)



Yellow-Orange (total=807)



- Yellows are riskier but if the shade is right, it can outcompete a red (MVP)

Colour

Plant aesthetics

- Bright, vibrant is most important
- Colour categories differ in "shade tolerance"
- Broad shade tolerance: Red, pink, two-tone
- Narrow shade tolerance: Yellow, White, Purple



Colour

Plant aesthetics

- Colour doesn't need to be from blooms
- Hippo rose (hypoestes) was most liked annual planter across 2 years of testing at 3 locations



Flower shape

Plant aesthetics

- Shape is just as, if not more, important than colour
- To consumers petal count \neq fullness
- Consumer definition of fullness = shape + petal count
- Globular most preferred, flat least preferred



Other features

Plant aesthetics

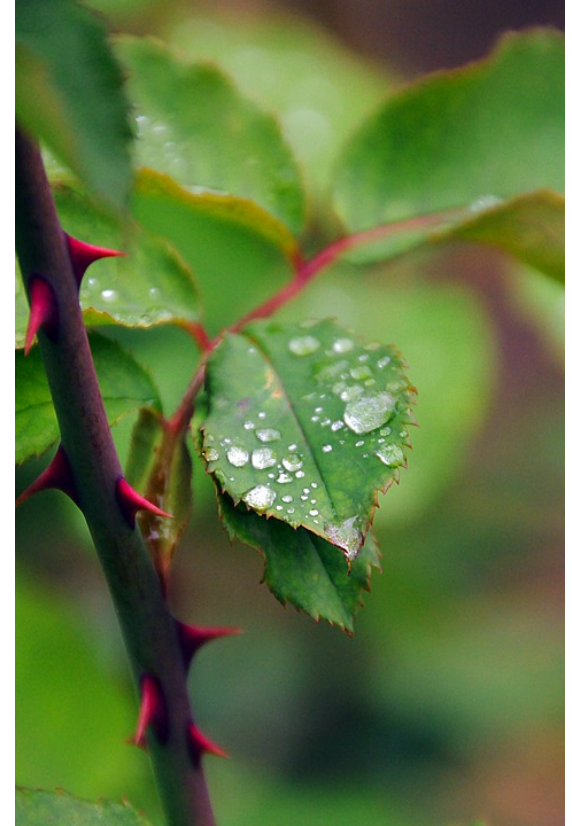
- Flower coverage
 - Not equivalent to number of blooms
 - Also influenced by flower distribution, size of blooms
- Fragrance
 - Opportunity for scent marketing?



What do consumers NOT notice?

Note: notice = consciously notice

- Foliage
- Plant architecture
- Plant hardiness/performance characteristics
 - Except for the more experienced gardeners
 - BUT it's still important
 - Plant hardiness is like food texture, many don't notice it, until it's wrong.



What do consumers notice?

Rose data

What they notice:

- Colour
- Flower shape
- Flower coverage
- Fragrance

What they don't (consciously) notice:

- Foliage
- Architecture
- Plant hardiness/performance



Why plant performance matters

Long-term satisfaction

We asked consumers...

“Think back to the last time you purchased a garden plant and then as the growing season went on, you became disappointed with your plant choice. What was the plant? Why were you disappointed?”



Why plant performance matters

Long-term satisfaction

- Roses were cited as the most disappointing plant by far most often
 - Consistent across studies & years
 - Disappointment was due to performance (died or poor bloom)
- Other plants that came a distant second in some studies: tomatoes, strawberries (died or poor fruiting)



Plant performance matters

Long-term satisfaction

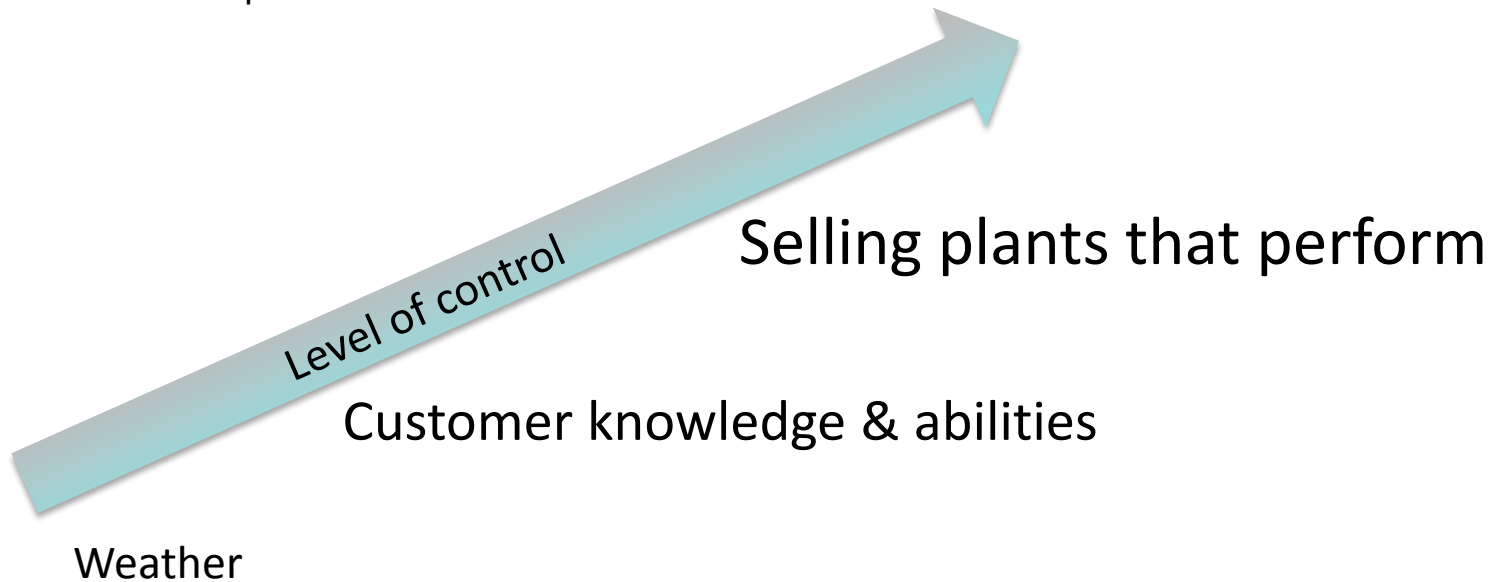
- Poor plant performance was the leading cause of plant disappointment
 - Important for long-term customer satisfaction
- Consumers with higher plant care knowledge have higher spend on plants
 - Success increases motivation



What's within our control?

Long-term satisfaction

- Performance depends on



Improving consumer knowledge

Long-term satisfaction

- “Educating the consumer” doesn’t work
 - Most won’t take time to read long-winded text
- Intuitive solutions
 - Light/moisture sensors
 - Plant selection apps
 - Cross-merchandising
 - “Plant care simplified” section at retail
 - Industry guidelines for plant tags?



Consumer knowledge

- Need to work on communication
- People expect anything in a pot to live indefinitely
 - E.g. potted herbs in 4in pots
- Need more clarity on plant tags
 - What's full sun? Part shade? Quality of light, number of hours



Key Takeaways

- Three-quarters of Canadians have a garden
 - Landscape gardens dominate but patio/balcony not too far behind
- ~70% have low-moderate gardening knowledge
- Vast majority enjoy gardening
- Notice: colour, flower shape, flower coverage, fragrance
- Don't notice: background foliage, architecture, hardiness characteristics
- Plant performance is important for long-term satisfaction



Acknowledgements

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Thank you

Contact Information: Alexandra Grygorczyk
Research Scientist, Consumer Insights

Alexandra.grygorczyk@vinelandresearch.com

vinelandresearch.com

 [@vinelandrsrch](https://twitter.com/vinelandrsrch)

 CANADIAN
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vineland

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