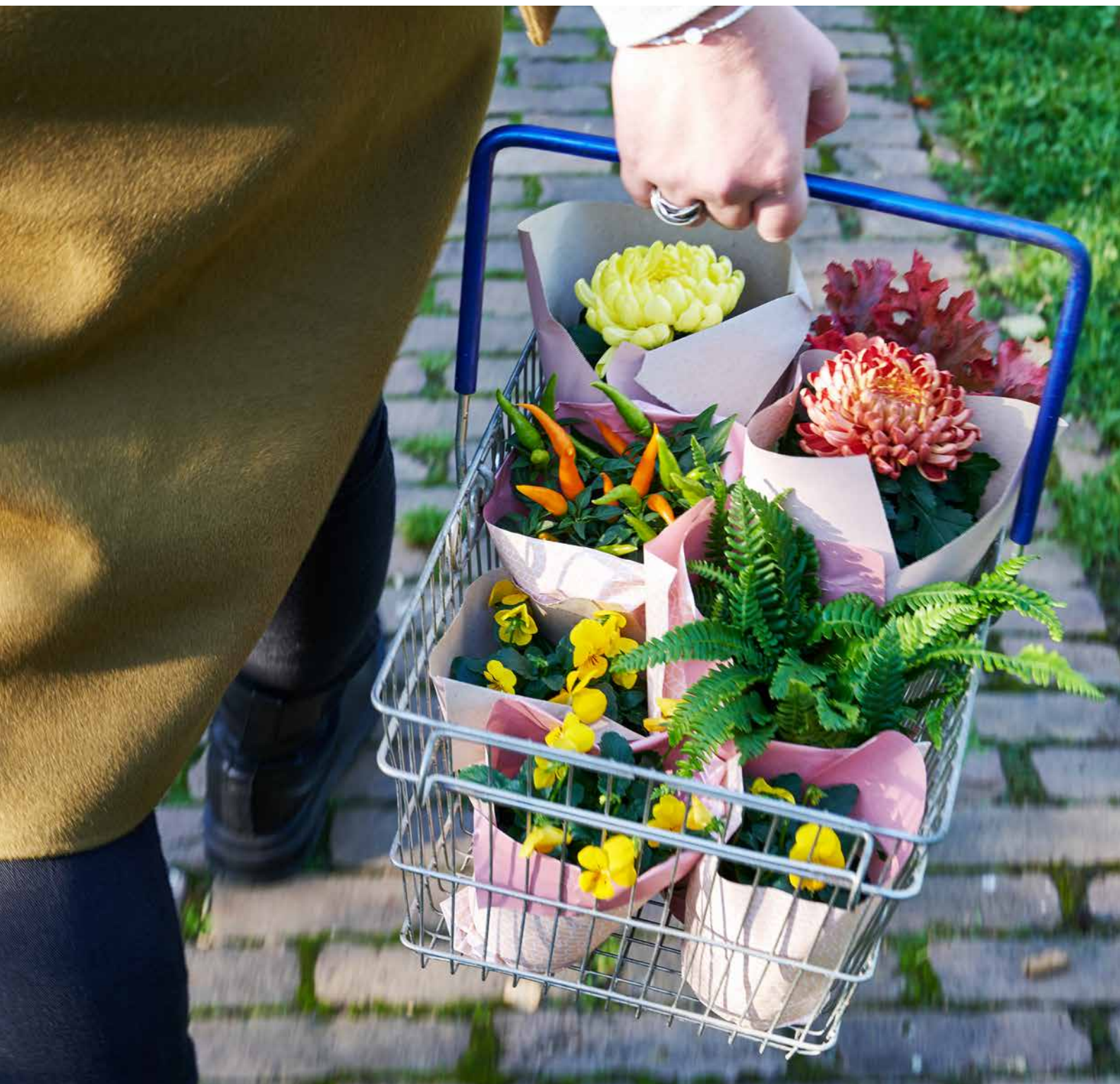


CONSUMER SURVEY

Consumer views regarding sustainability in the flower and plant sector



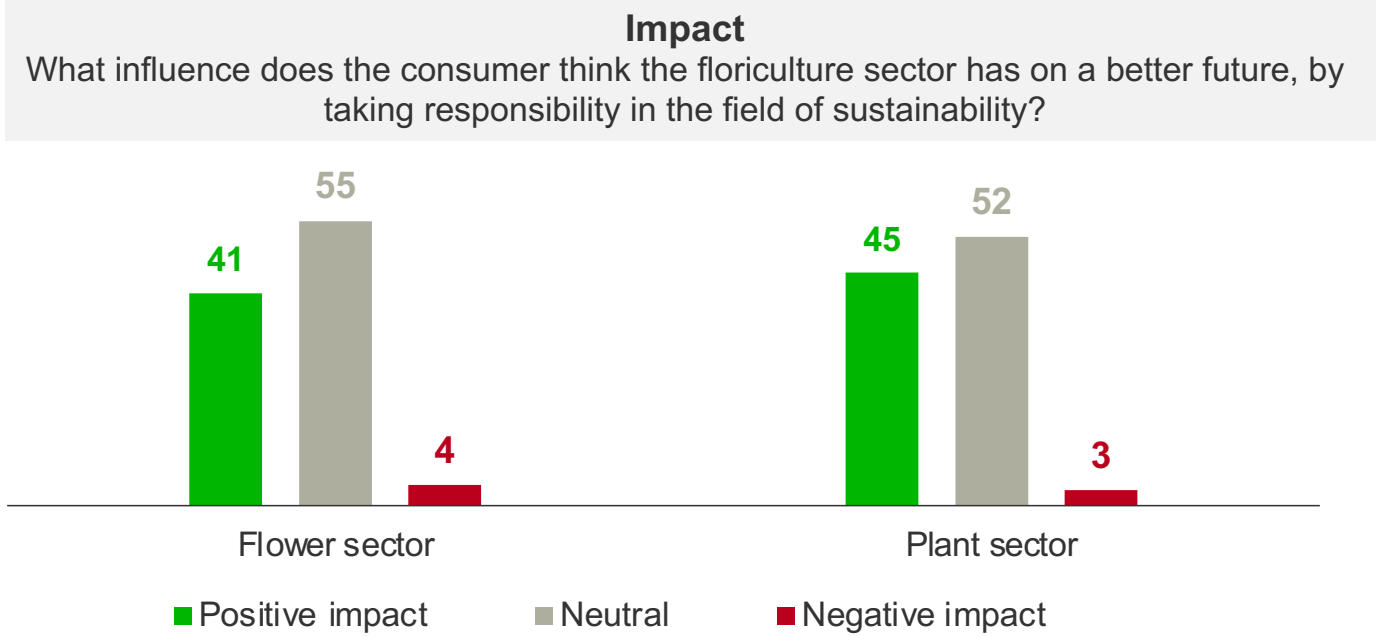
QUANTITATIVE RESEARCH

Carried out by market research firm Kantar in four countries in May 2023. Commissioned by the Flower Council of Holland.

October 2023

Flower
Council 
Holland

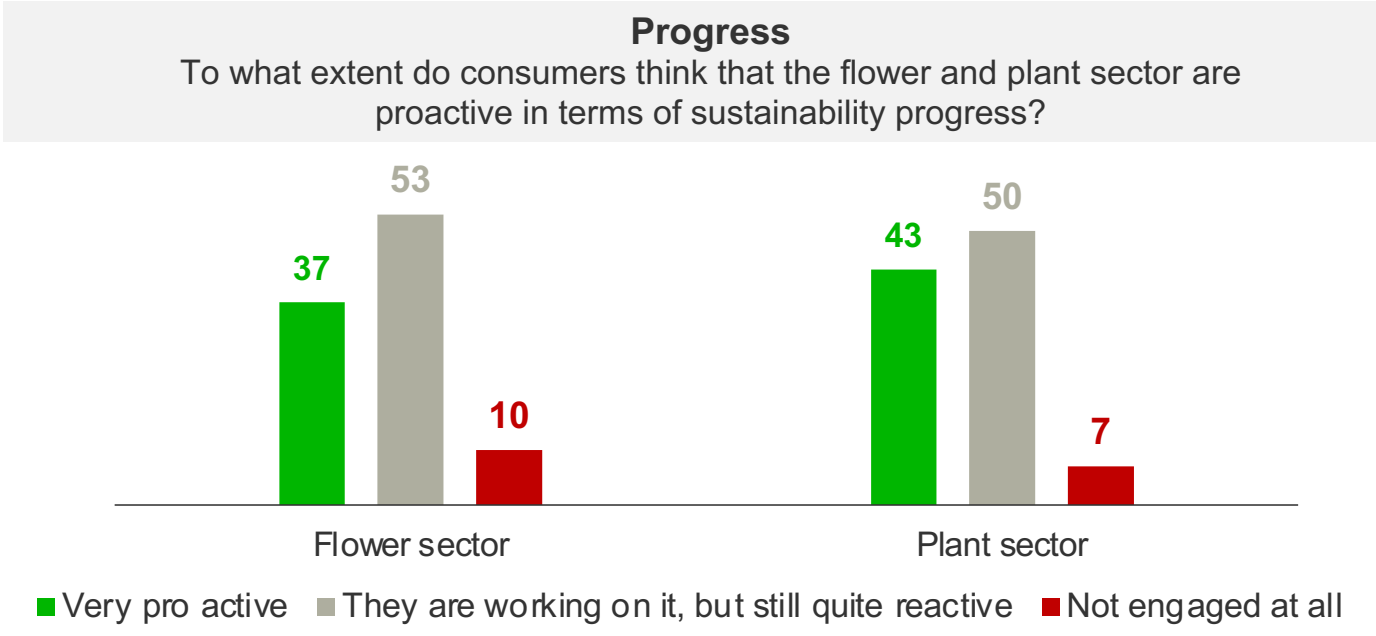
Consumer perception



Concerns

To what extent are consumers concerned about the following issues? - Top 5 per category

Flowers	Houseplants	Garden plants
1. Water or land pollution due to usage of chemical pesticides and/or fertilizers	1. Water or land pollution due to usage of chemical pesticides and/or fertilizers	1. Water or land pollution due to usage of chemical pesticides and/or fertilizers
2. Health risks due to the usage of chemical pesticides and/or fertilizers	2. Health risks due to the usage of chemical pesticides and/or fertilizers	2. Excessive amount of packaging
3. Excessive amount of packaging	3. Excessive amount of packaging	3. Health risks due to the usage of chemical pesticides and/or fertilizers
4. Non-recyclable packaging	4. Non-recyclable packaging	4. Non-recyclable packaging
5. Emissions due to air transportation	5. Intensive farming (exhaustion of soil)	5. Intensive farming (exhaustion of soil)



Expected action

Which of the following issues do consumers expect the flower and plant sector to act upon? - Top 5 per category

Flowers	Houseplants	Garden plants
1. Excessive amount of packaging	1. Excessive amount of packaging	1. Water or land pollution due to usage of chemical pesticides and/or fertilizers
2. Water or land pollution due to usage of chemical	2. Water or land pollution due to usage of chemical	2. Excessive amount of packaging
3. Non-recyclable packaging	3. Non-recyclable packaging	3. Health risks due to the usage of chemical pesticides and/or fertilizers
4. Health risks due to the usage of chemical pesticides and/or fertilizers	4. Health risks due to the usage of chemical pesticides and/or fertilizers	4. Non-recyclable packaging
5. Greenhouse gasses (e.g. CO2 emissions and nitrogen)	5. Greenhouse gasses (e.g. CO2 emissions and nitrogen)	5. Impact of (excessive) water usage

Consumer perception

Barriers

What are the barriers for consumers to behave more sustainably? - Top 5 per category

Flowers	Houseplants	Garden plants
<ol style="list-style-type: none"> 1. It is really hard to tell which flowers are bad ethically or for the environment 2. They don't have enough information about where specific flowers are being grown 3. They don't have enough information about the impact of the production and transportation of flowers 4. When shopping, their mind is on saving money more than saving the planet 5. They don't think about sustainability when buying flowers 	<ol style="list-style-type: none"> 1. It is really hard to tell which houseplants are bad ethically or for the environment 2. They don't have enough information about where specific houseplants are being grown 3. They don't have enough information about the impact of the production and transportation of houseplants 4. When shopping, their mind is on saving money more than saving the planet 5. It is not part of their routine to think about sustainability when buying houseplants 	<ol style="list-style-type: none"> 1. They don't have enough information about the impact of the production and transportation of garden plants 2. It is really hard to tell which garden plants are bad ethically or for the environment 3. They don't have enough information about where specific garden plants are being grown 4. When shopping, their mind is on saving money more than saving the planet 5. They are convinced they are already being sustainable by buying greenery such as garden plants

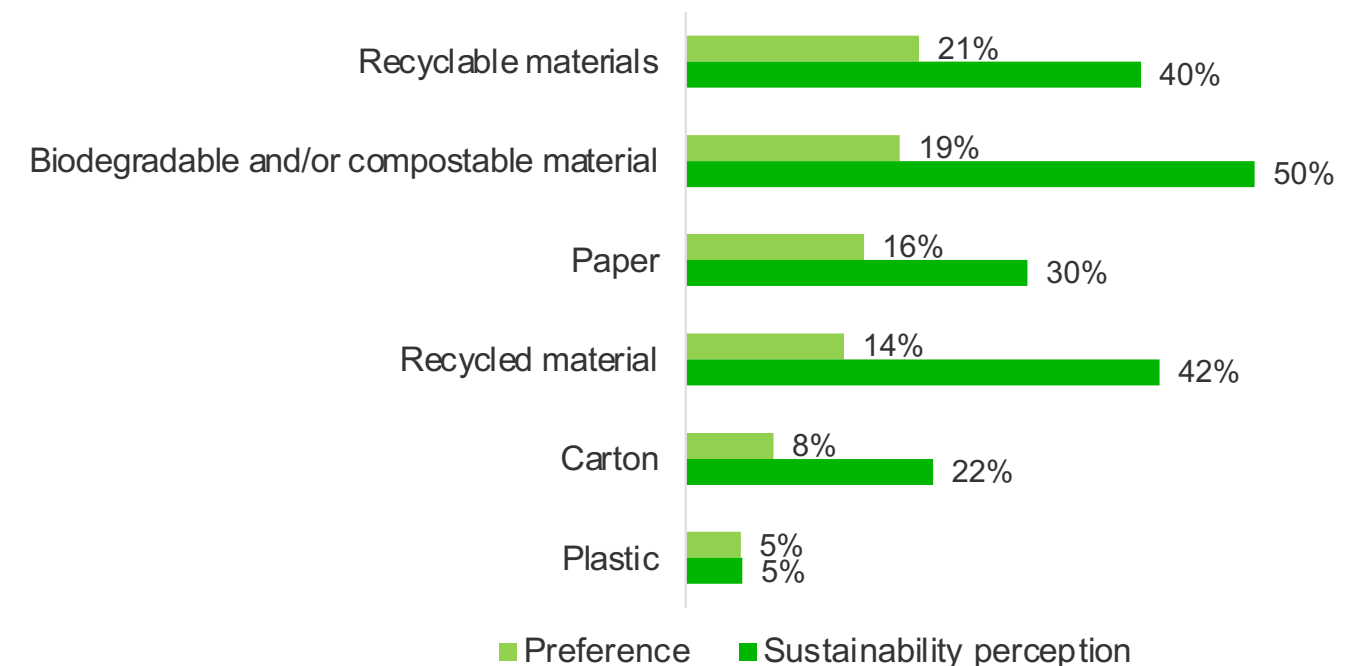
Labels

How often do consumers come across sustainability labels and does this help them to make a more sustainable choice?

59% has come across sustainability labels	→ of which →	32% is helped by sustainability labels
41% has <u>never</u> come across sustainability labels	→ of which →	48% <u>thinks</u> it would help them

Packaging

Which of these packaging materials do consumers prefer and which do they consider to be sustainable?

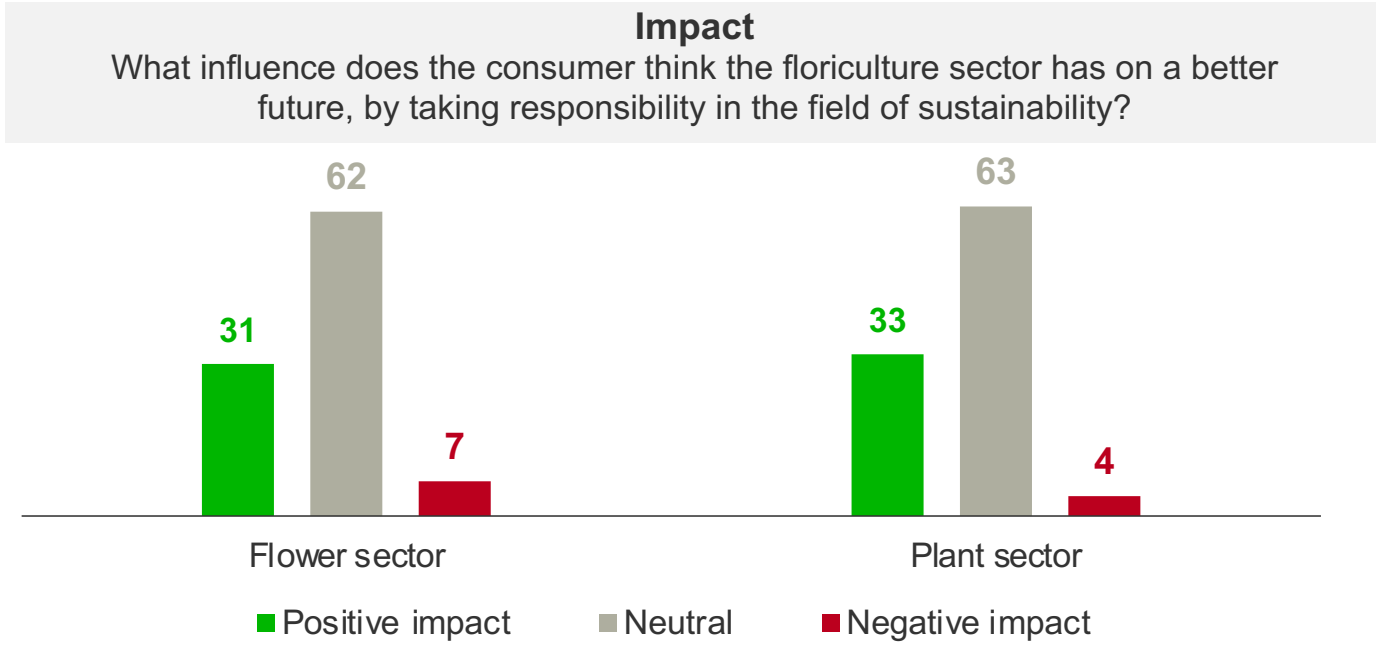


Communication

What proportion of consumers recently came across any communication expressions and how did this influence their perception?

Flowers	Houseplants	Garden plants
39%	45%	46%
of which	of which	of which
30% is positively influenced 20% is negatively influenced	32% is positively influenced 22% is negatively influenced	27% is positively influenced 20% is negatively influenced

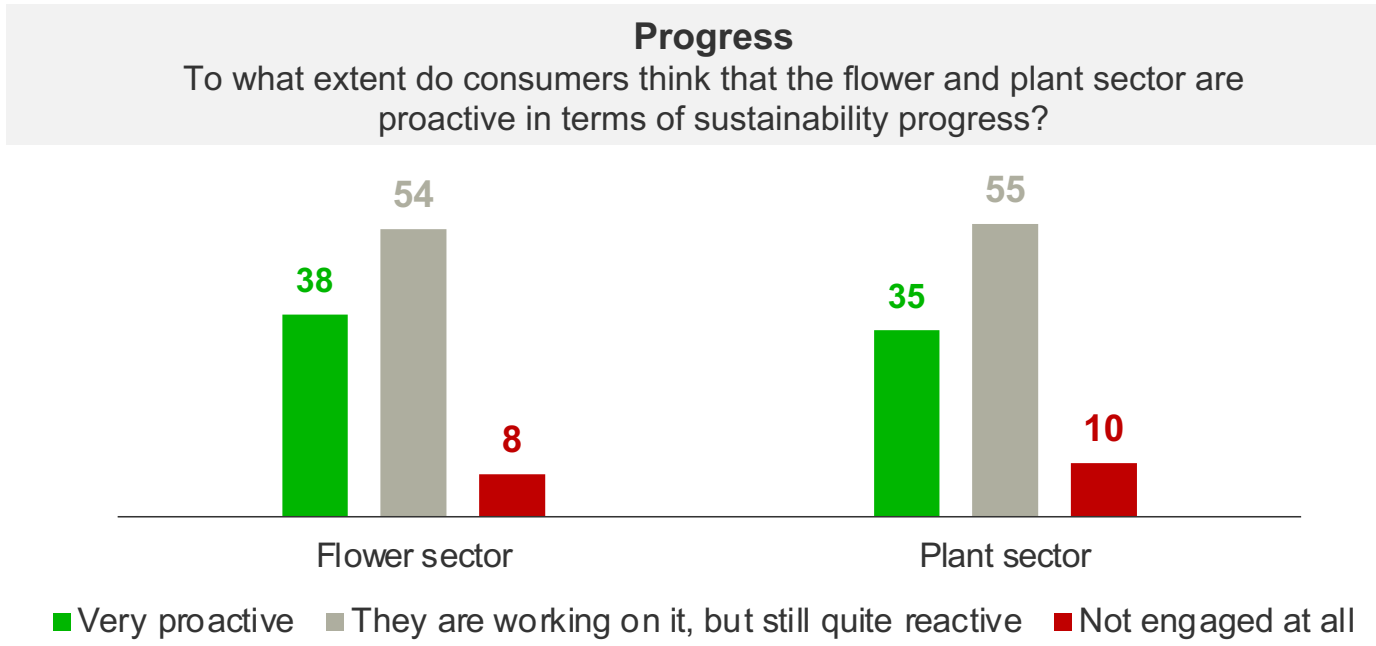
Consumer perception



Concerns

To what extent are consumers concerned about the following issues? - Top 5 per category

Flowers	Houseplants	Garden plants
<ol style="list-style-type: none">Water or land pollution due to usage of chemical pesticides and/or fertilizersNon-recyclable packagingExcessive amount of packagingHealth risks due to the usage of chemical pesticides and/or fertilizersUsage of artificial pigments (e.g. colouring of flowers)	<ol style="list-style-type: none">Water or land pollution due to usage of chemical pesticides and/or fertilizersNon-recyclable packagingExcessive amount of packagingHealth risks due to the usage of chemical pesticides and/or fertilizersEmissions due to air transportation	<ol style="list-style-type: none">Excessive amount of packagingWater or land pollution due to usage of chemical pesticides and/or fertilizersNon-recyclable packagingIntensive farming (exhaustion of soil)Health risks due to the usage of chemical pesticides and/or fertilizers



Expected action

Which of the following issues do consumers expect the flower and plant sector to act upon? - Top 5 per category

Flowers	Houseplants	Garden plants
<ol style="list-style-type: none">Greenhouse gasses (e.g. CO2 emissions and nitrogen)Non-recyclable packagingExcessive amount of packagingWater or land pollution due to usage of chemical pesticides and/or fertilizersHealth risks due to the usage of chemical pesticides and/or fertilizers	<ol style="list-style-type: none">Excessive amount of packagingGreenhouse gasses (e.g. CO2 emissions and nitrogen)Non-recyclable packagingWater or land pollution due to usage of chemicalHealth risks due to the usage of chemical pesticides and/or fertilizers	<ol style="list-style-type: none">Non-recyclable packagingExcessive amount of packagingGreenhouse gasses (e.g. CO2 emissions and nitrogen)Water or land pollution due to usage of chemical pesticides and/or fertilizersHealth risks due to the usage of chemical pesticides and/or fertilizers

Consumer perception

Barriers

What are the barriers for consumers to behave more sustainably? - Top 5 per category



Flowers

1. They don't think about flowers sustainability when buying
2. It is really hard to tell which flowers are bad ethically or for the environment
3. They don't have enough information about where specific flowers are being grown
4. It is not part of their routine to think about sustainability when buying flowers
5. When shopping, their mind is on saving money more than saving the planet



Houseplants

1. It is really hard to tell which houseplants are bad ethically or for the environment
2. When shopping, their mind is on saving money more than saving the planet
3. It is not part of their routine to think about sustainability when buying houseplants
4. They don't think about sustainability when buying houseplants
5. They don't have enough information about where specific houseplants are being grown



Garden plants

1. They are convinced they are already being sustainable by buying greenery such as garden plants
2. It is really hard to tell which garden plants are bad ethically or for the environment
3. They don't have enough information about the impact of the production and transportation of garden plants
4. They don't have enough information about where specific garden plants are being grown
5. They are not aware of sustainability labels

Labels

How often do consumers come across sustainability labels and does this help them to make a more sustainable choice?

50% has come across sustainability labels



of which



29% is helped by sustainability labels

50% has never come across sustainability labels



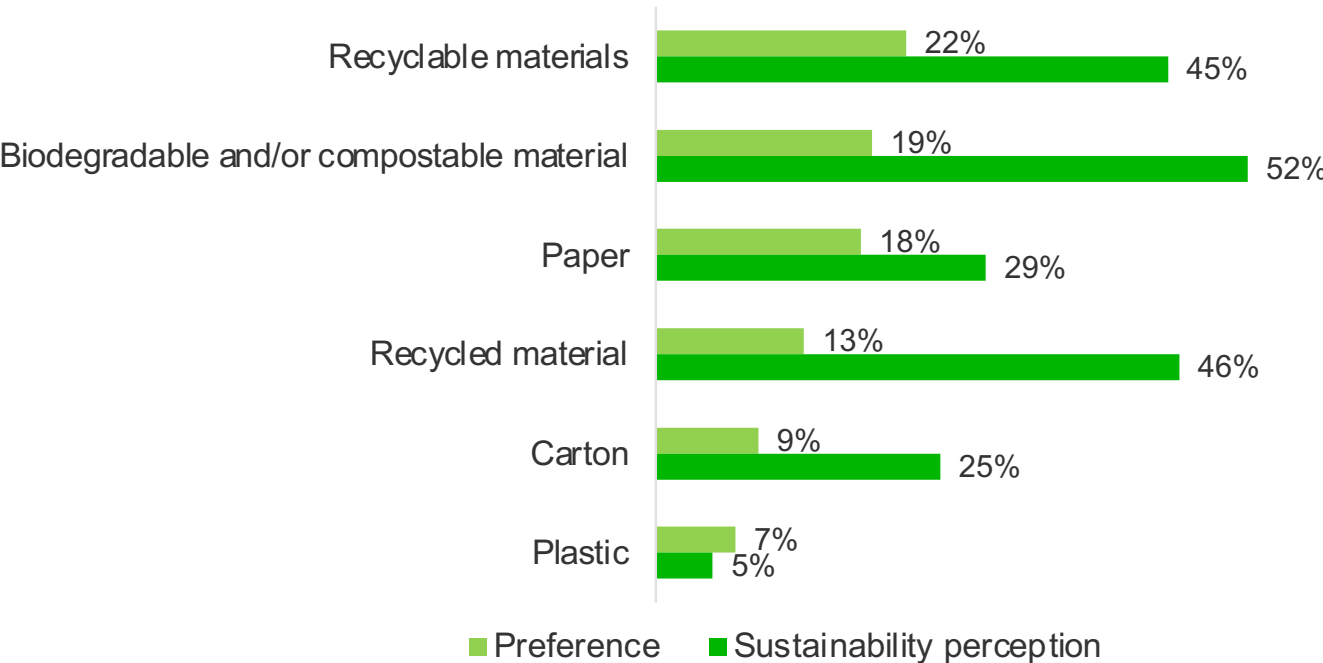
of which



40% thinks it would help them

Packaging

Which of these packaging materials do consumers prefer and which do they consider to be sustainable?



Communication

What proportion of consumers recently came across any communication expressions and how did this influence their perception?



Flowers

33%

of which

23% is positively influenced
21% is negatively influenced



Houseplants

39%

of which

29% is positively influenced
25% is negatively influenced



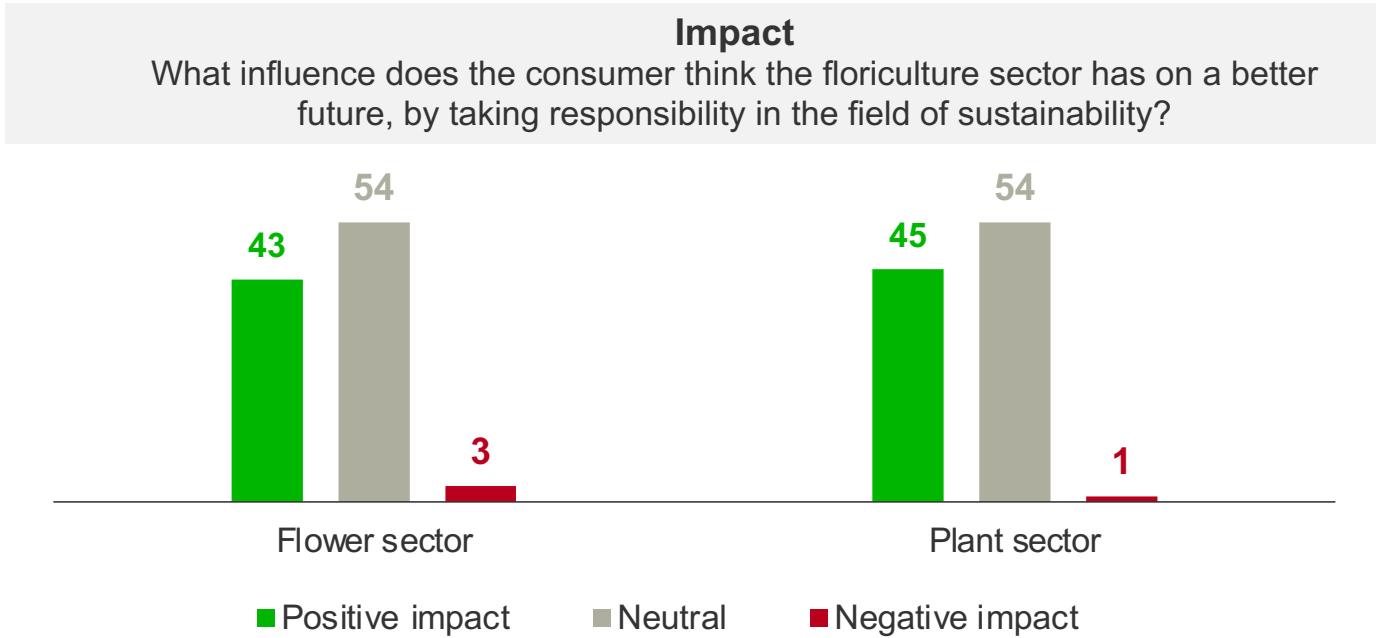
Garden plants

38%

of which

18% is positively influenced
21% is negatively influenced

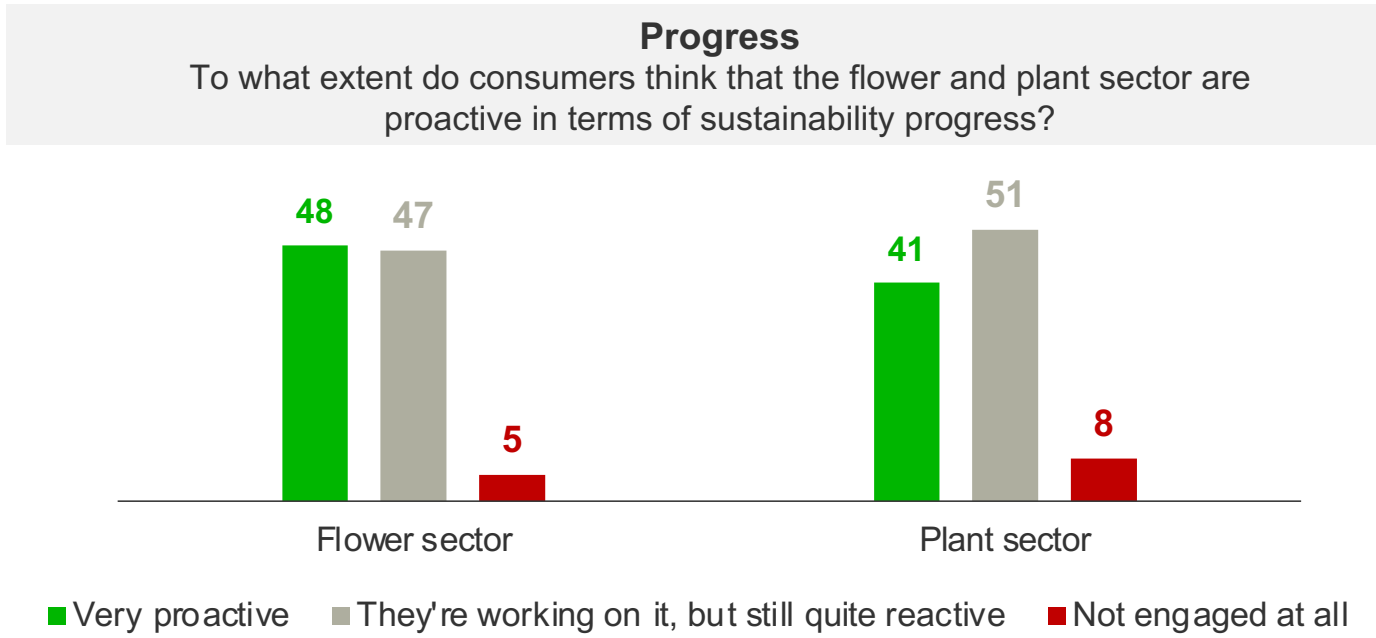
Consumer perception



Concerns

To what extent are consumers concerned about the following issues? - Top 5 per category

Flowers	Houseplants	Garden plants
<ol style="list-style-type: none">Excessive amount of packagingWater or land pollution due to usage of chemical pesticides and/or fertilizersNon-recyclable packagingHealth risks due to the usage of chemical pesticides and/or fertilizersBad employee conditions	<ol style="list-style-type: none">Excessive amount of packagingWater or land pollution due to usage of chemical pesticides and/or fertilizersNon-recyclable packagingHealth risks due to the usage of chemical pesticides and/or fertilizersUsage of fossil fuels for transportation	<ol style="list-style-type: none">Water or land pollution due to usage of chemical pesticides and/or fertilizersNon-recyclable packagingExcessive amount of packagingHealth risks due to the usage of chemical pesticides and/or fertilizersIntensive farming (exhaustion of soil)



Expected action

Which of the following issues do consumers expect the flower and plant sector to act upon? - Top 5 per category

Flowers	Houseplants	Garden plants
<ol style="list-style-type: none">Non-recyclable packagingExcessive amount of packagingWater or land pollution due to usage of chemicalHealth risks due to the usage of chemical pesticides and/or fertilizersFlower waste	<ol style="list-style-type: none">Non-recyclable packagingHealth risks due to the usage of chemical pesticides and/or fertilizersWater or land pollution due to usage of chemical pesticides and/or fertilizersExcessive amount of packagingBad employee conditions	<ol style="list-style-type: none">Non-recyclable packagingExcessive amount of packagingHealth risks due to the usage of chemical pesticides and/or fertilizersPlant wasteWater or land pollution due to usage of chemical pesticides and/or fertilizers

Consumer perception

Barriers

What are the barriers for consumers to behave more sustainably? - Top 5 per category

Flowers	Houseplants	Garden plants
<ol style="list-style-type: none">1. It is really hard to tell which flowers are bad ethically or for the environment2. When shopping, their mind is on saving money more than saving the planet3. They don't think about sustainability when buying flowers4. They don't have enough information about the impact of the production and transportation of flowers5. They don't have enough information about where specific flowers are being grown	<ol style="list-style-type: none">1. They don't have enough information about the impact of the production and transportation of houseplants2. They don't have enough information about where specific houseplants are being grown3. It is really hard to tell which houseplants are bad ethically or for the environment4. When shopping, their mind is on saving money more than saving the planet5. They are convinced they are already being sustainable by buying greenery such as houseplants	<ol style="list-style-type: none">1. It is really hard to tell which garden plants are bad ethically or for the environment2. When shopping, their mind is on saving money more than saving the planet3. They don't have enough information about the impact of the production and transportation of garden plants4. They don't have enough information about where specific garden plants are being grown5. They are convinced they are already being sustainable by buying greenery such as garden plants

Labels

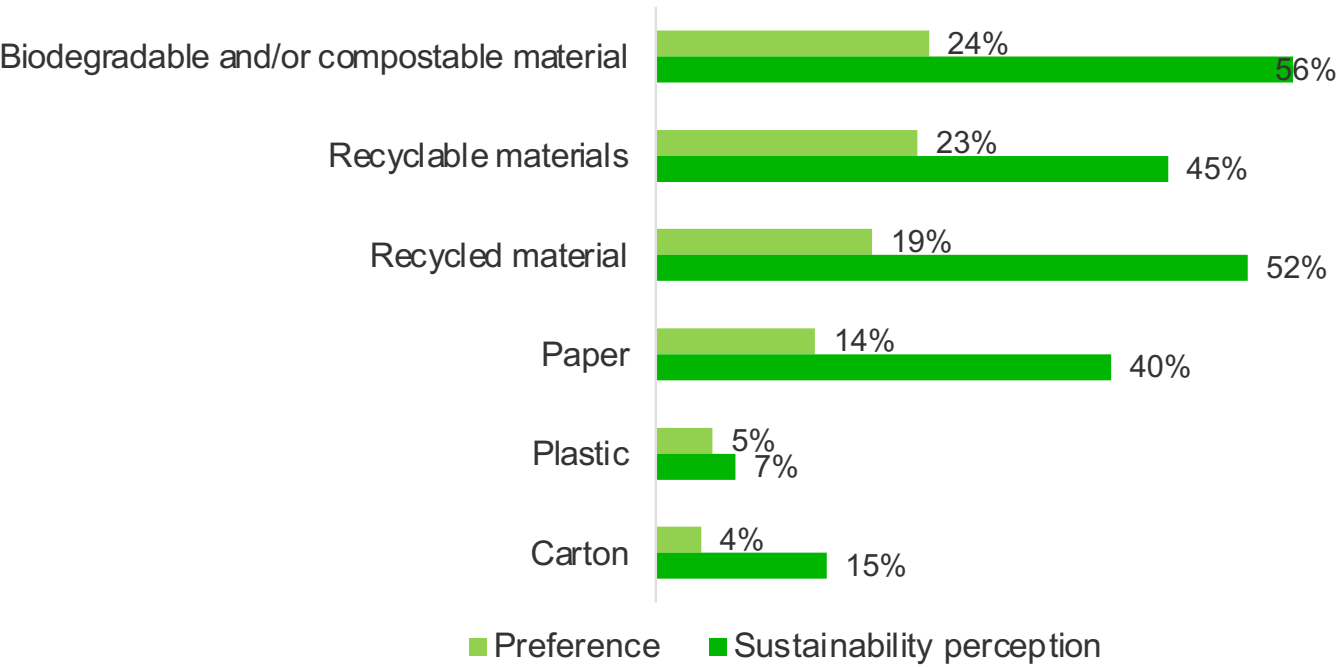
How often do consumers come across sustainability labels and does this help them to make a more sustainable choice?

57% has come across sustainability labels → of which → **30%** is helped by sustainability labels

43% has never come across sustainability labels → of which → **60%** thinks it would help them

Packaging

Which of these packaging materials do consumers prefer and which do they consider to be sustainable?



Communication

What proportion of consumers recently came across any communication expressions and how did this influence their perception?

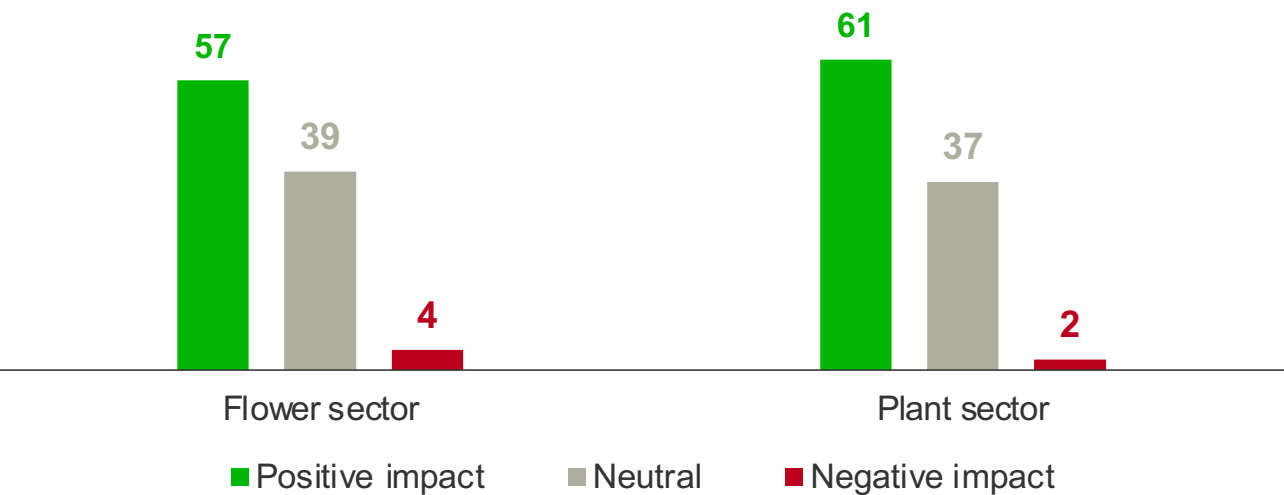
Flowers	Houseplants	Garden plants
33%	46%	41%
of which	of which	of which
32% is positively influenced 21% is negatively influenced	33% is positively influenced 21% is negatively influenced	36% is positively influenced 18% is negatively influenced

Consumer perception



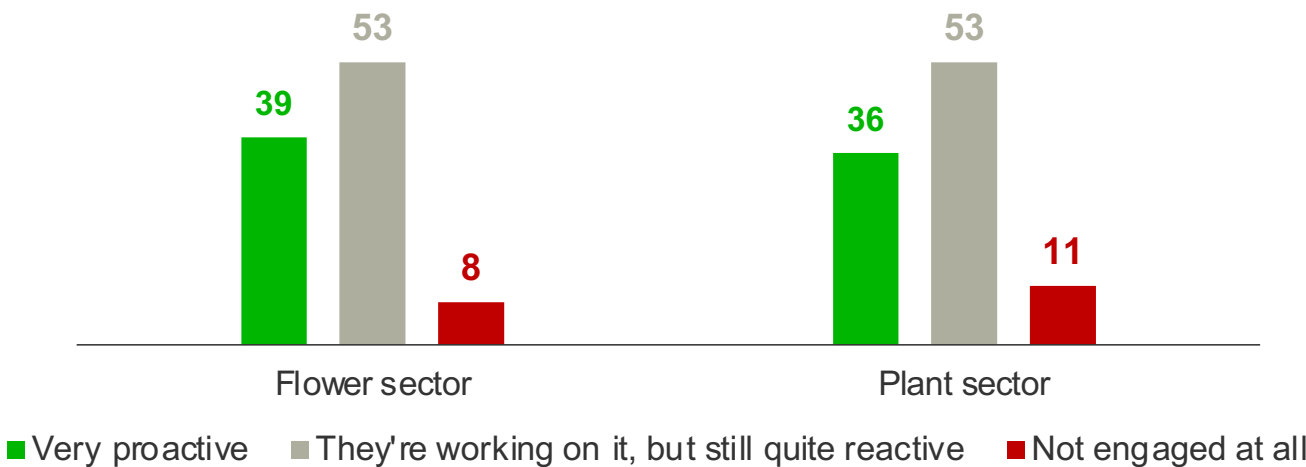
Impact

What influence does the consumer think the floriculture sector has on a better future, by taking responsibility in the field of sustainability?



Progress

To what extent do consumers think that the flower and plant sector are proactive in terms of sustainability progress?



Concerns

To what extent are consumers concerned about the following issues? - Top 5 per category

Flowers	Houseplants	Garden plants
<ol style="list-style-type: none">1. Water or land pollution due to usage of chemical pesticides and/or fertilizers2. Health risks due to the usage of chemical pesticides and/or fertilizers3. Impact of (excessive) water usage4. Excessive amount of packaging5. Intensive farming (exhaustion of soil)	<ol style="list-style-type: none">1. Health risks due to the usage of chemical pesticides and/or fertilizers2. Water or land pollution due to usage of chemical pesticides and/or fertilizers3. Impact of (excessive) water usage4. Excessive amount of packaging5. Intensive farming (exhaustion of soil)	<ol style="list-style-type: none">1. Water or land pollution due to usage of chemical pesticides and/or fertilizers2. Health risks due to the usage of chemical pesticides and/or fertilizers3. Impact of (excessive) water usage4. Excessive amount of packaging5. Intensive farming (exhaustion of soil)

Expected action

Which of the following issues do consumers expect the flower and plant sector to act upon? - Top 5 per category

Flowers	Houseplants	Garden plants
<ol style="list-style-type: none">1. Water or land pollution due to usage of chemical pesticides and/or fertilizers2. Impact of (excessive) water usage3. Health risks due to the usage of chemical pesticides and/or fertilizers packaging4. Intensive farming (exhaustion of soil)5. Excessive amount of packaging	<ol style="list-style-type: none">1. Impact of (excessive) water usage2. Water or land pollution due to usage of chemical pesticides and/or fertilizers3. Excessive amount of packaging4. Health risks due to the usage of chemical pesticides and/or fertilizers5. Intensive farming (exhaustion of soil)	<ol style="list-style-type: none">1. Water or land pollution due to usage of chemical pesticides and/or fertilizers2. Health risks due to the usage of chemical pesticides and/or fertilizers3. Impact of (excessive) water usage4. Excessive amount of packaging5. Intensive farming (exhaustion of soil)

Consumer perception



Barriers

What are the barriers for consumers to behave more sustainably? - Top 5 per category

Flowers	Houseplants	Garden plants
1. They don't have enough information about the impact of the production and transportation of flowers	1. They don't have enough information about the impact of the production and transportation of houseplants	1. They don't have enough information about the impact of the production and transportation of garden plants
2. They don't have enough information about where specific flowers are being grown	2. They don't have enough information about where specific houseplants are being grown	2. They don't have enough information about where specific garden plants are being grown
3. They are not aware of sustainability labels	3. It is really hard to tell which houseplants are bad ethically or for the environment	3. It is really hard to tell which garden plants are bad ethically or for the environment
4. It is really hard to tell which flowers are bad ethically or for the environment	4. They are not aware of sustainability labels	4. They are not aware of sustainability labels
5. When shopping, their mind is on saving money more than saving the planet	5. It is not part of their routine to think about sustainability when buying houseplants	5. When shopping, their mind is on saving money more than saving the planet

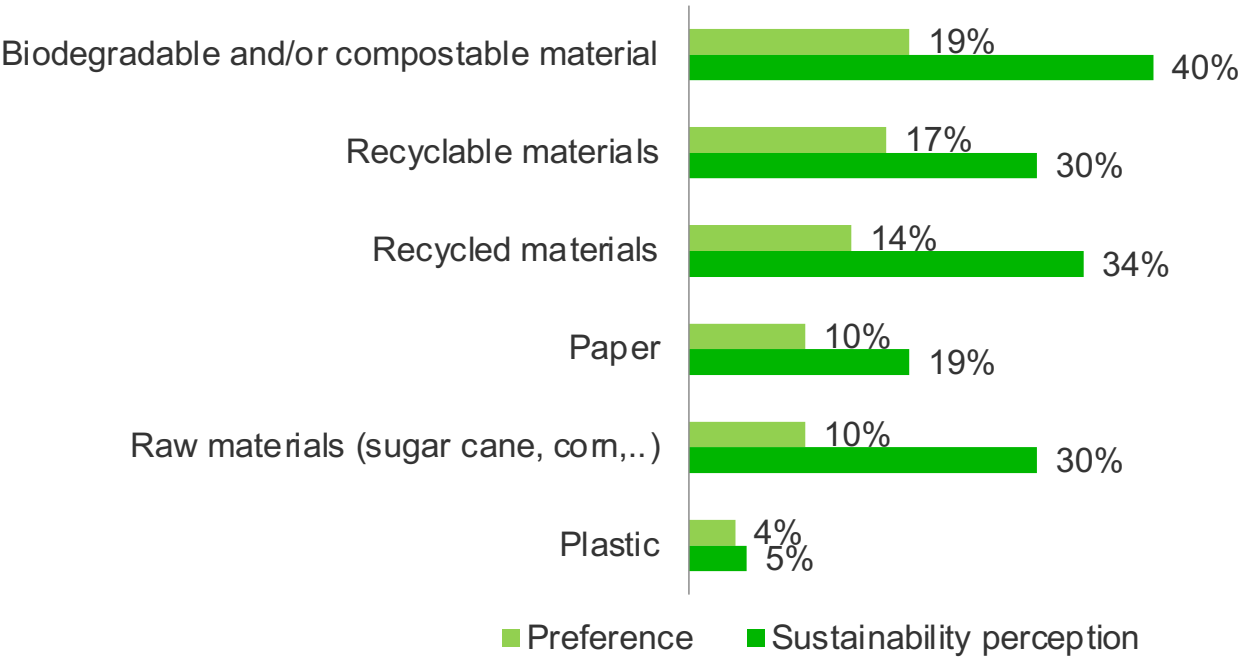
Labels

How often do consumers come across sustainability labels and does this help them to make a more sustainable choice?

68% has come across sustainability labels	→ of which →	36% is helped by sustainability labels
32% has <u>never</u> come across sustainability labels	→ of which →	48% <u>thinks</u> it would help them

Packaging

Which of these packaging materials do consumers prefer and which do they consider to be sustainable?



■ Preference ■ Sustainability perception

Communication

What proportion of consumers recently came across any communication expressions and how did this influence their perception?

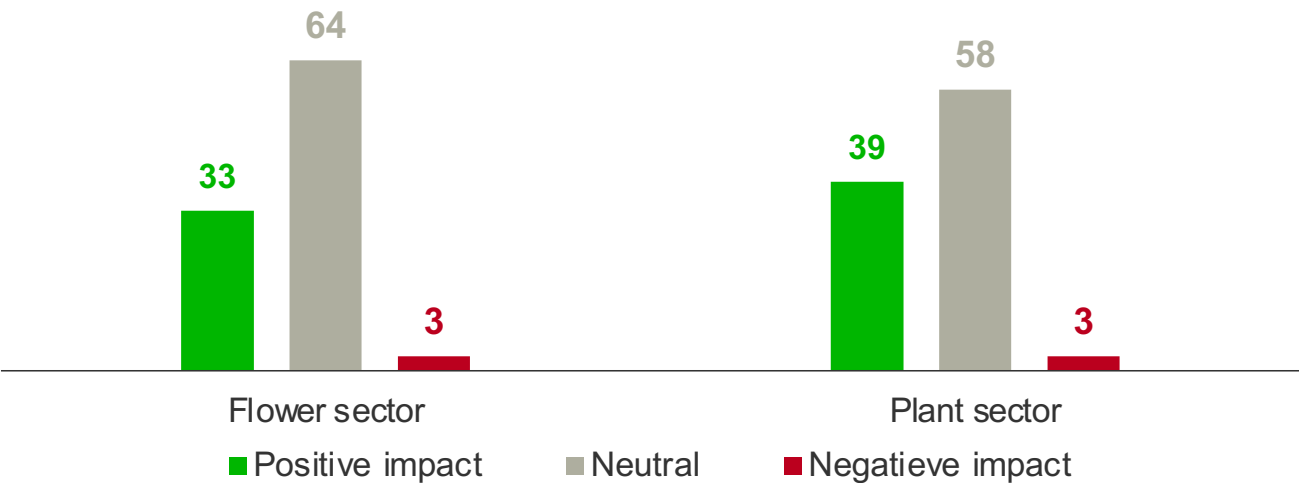
Flowers	Houseplants	Garden plants
53%	51%	53%
of which	of which	of which
32% is positively influenced 18% is negatively influenced	30% is positively influenced 21% is negatively influenced	26% is positively influenced 21% is negatively influenced

Consumer perception



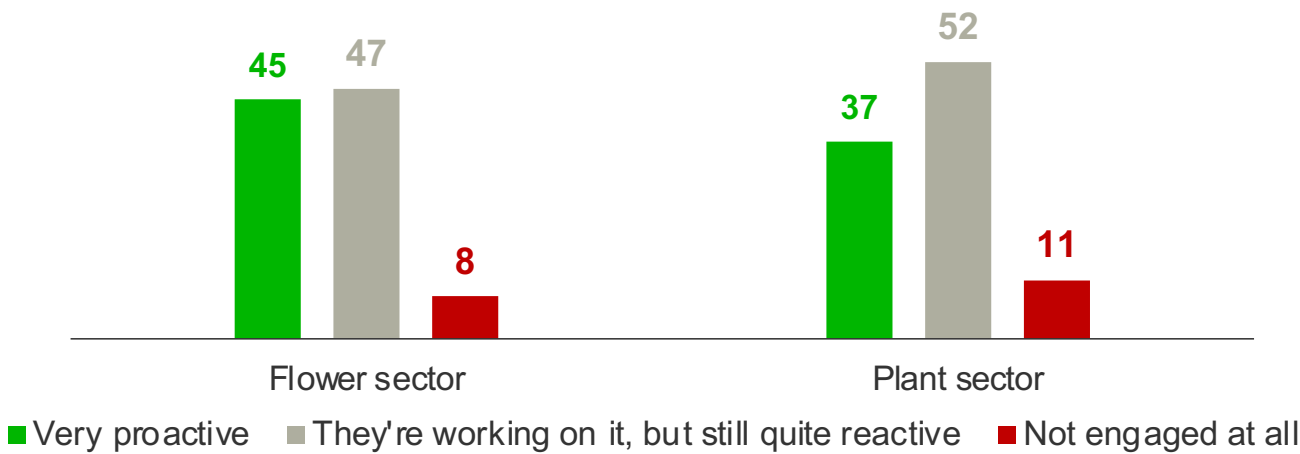
Impact

What influence does the consumer think the floriculture sector has on a better future, by taking responsibility in the field of sustainability?



Progress

To what extent do consumers think that the flower and plant sector are proactive in terms of sustainability progress?



Concerns

To what extent are consumers concerned about the following issues? - Top 5 per category

Flowers	Houseplants	Garden plants
<ol style="list-style-type: none">1. Water or land pollution due to usage of chemical pesticides and/or fertilizers2. Health risks due to the usage of chemical pesticides and/or fertilizers3. Excessive amount of packaging4. Impact of (excessive) water usage5. Non-recyclable packaging	<ol style="list-style-type: none">1. Health risks due to the usage of chemical pesticides and/or fertilizers2. Water or land pollution due to usage of chemical pesticides and/or fertilizers3. Excessive amount of packaging4. Loss of biodiversity5. Impact of (excessive) water usage	<ol style="list-style-type: none">1. Water or land pollution due to usage of chemical pesticides and/or fertilizers2. Excessive amount of packaging3. Health risks due to the usage of chemical pesticides and/or fertilizers4. Impact of (excessive) water usage5. Intensive farming (exhaustion of soil)

Expected action

Which of the following issues do consumers expect the flower and plant sector to act upon? - Top 5 per category

Flowers	Houseplants	Garden plants
<ol style="list-style-type: none">1. Excessive amount of packaging2. Water or land pollution due to usage of chemical pesticides and/or fertilizers3. Non-recyclable packaging4. Health risks due to the usage of chemical pesticides and/or fertilizers5. Impact of (excessive) water usage	<ol style="list-style-type: none">1. Water or land pollution due to usage of chemical pesticides and/or fertilizers2. Health risks due to the usage of chemical pesticides and/or fertilizers3. Excessive amount of packaging4. Non-recyclable packaging5. Impact of (excessive) water usage	<ol style="list-style-type: none">1. Health risks due to the usage of chemical pesticides and/or fertilizers2. Water or land pollution due to usage of chemical pesticides and/or fertilizers3. Excessive amount of packaging4. Non-recyclable packaging5. Impact of (excessive) water usage

Consumer perception



Barriers

What are the barriers for consumers to behave more sustainably? - Top 5 per category

Flowers	Houseplants	Garden plants
1. They don't have enough information about where specific flowers are being grown	1. They don't have enough information about where specific houseplants are being grown	1. They don't have enough information about the impact of the production and transportation of garden plants
2. They don't have enough information about the impact of the production and transportation of flowers	2. It is really hard to tell which houseplants are bad ethically or for the environment	2. They don't have enough information about where specific garden plants are being grown
3. It is really hard to tell which flowers are bad ethically or for the environment	3. They don't have enough information about the impact of the production and transportation of houseplants	3. They see the purchase of garden plants as a long-term investment, and so as a sustainable investment
4. They believe sustainable flowers are more expensive	4. They see the purchase of houseplants as a long-term investment, and so as a sustainable investment	4. It is really hard to tell which garden plants are bad ethically or for the environment
5. It is not part of their routine to think about sustainability when buying flowers	5. It is not part of their routine to think about sustainability when buying houseplants	5. They see garden plants often as products that are locally grown

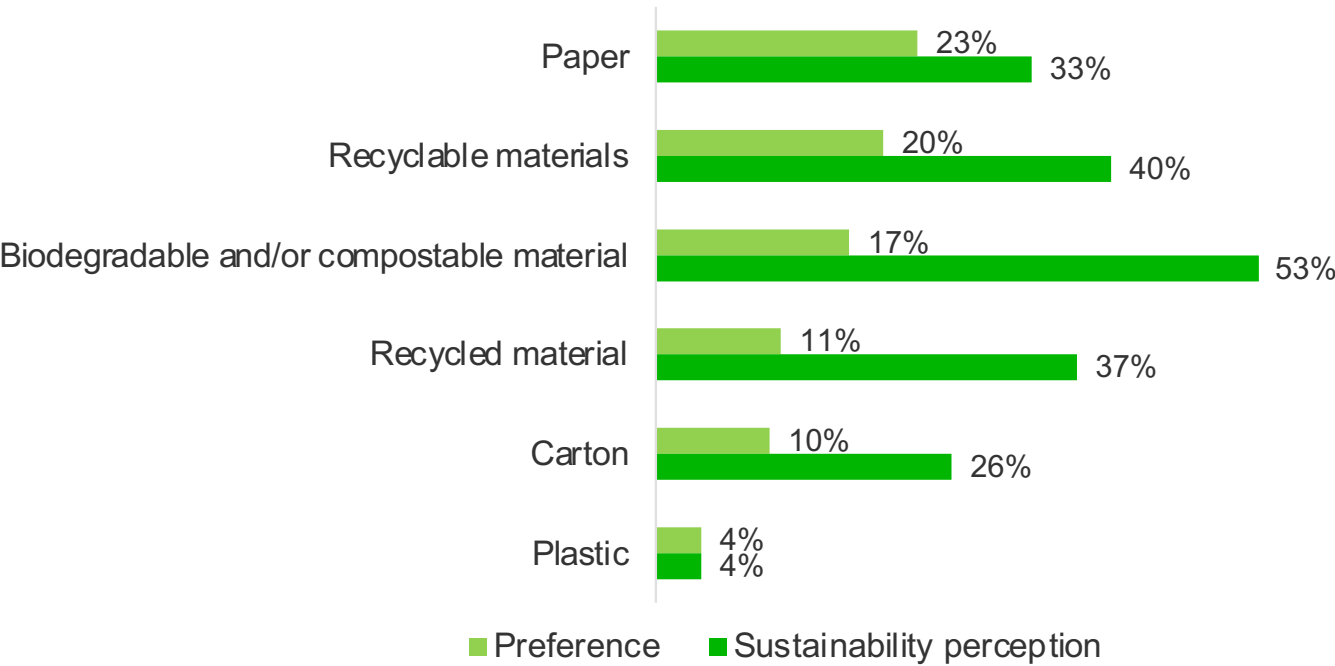
Labels

How often do consumers come across sustainability labels and does this help them to make a more sustainable choice?

60% has come across sustainability labels	→ of which →	32% is helped by sustainability labels
40% has <u>never</u> come across sustainability labels	→ of which →	47% <u>thinks</u> it would help them

Packaging

Which of these packaging materials do consumers prefer and which do they consider to be sustainable?



Communication

What proportion of consumers recently came across any communication expressions and how did this influence their perception?

Flowers	Houseplants	Garden plants
37%	44%	50%
of which	of which	of which
31% is positively influenced 22% is negatively influenced	35% is positively influenced 20% is negatively influenced	28% is positively influenced 20% is negatively influenced

NOTES

This image shows a single sheet of white paper with horizontal ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins, text, or other markings on the paper.

ABOUT THIS SURVEY

This quantitative survey took place in May 2023 in the Netherlands, Germany, France and the United Kingdom. The sample was nationally representative of men and women aged 18 to 70. They buy flowers for themselves and/or as a gift (at least every 3 months) and/or houseplants (at least every 6 months) and/or garden plants (at least every 6 months).

The research is partly a repetition and a deepening of the research from 2022. This time, the role of packaging and the influence of sustainability labels and communication were also inquired about. A distinction has also been made between flowers, houseplants and garden plants, to get more specific insights into the differences between the categories.



Scan the QR code and read more
about this research on our website.

More information

Follow-up research on sustainability

In order to be able to follow the development of the sentiment about sustainability in relation to the floriculture sector, the Flower Council of Holland has started a biweekly consumer survey. More on that later.

FURTHER INFORMATION

If you have any questions on the survey, please feel free to get in touch with Monique Kemperman at mkemperman@bloemenbureauholland.nl or Anne van der Wal at avanderwal@bloemenbureauholland.nl

Interested in receiving more information on consumer research and other activities of the Flower Council of Holland? Sign up for our newsletter by scanning this QR code. Don't forget to accept the email confirmation.



Newsletter

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