

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.

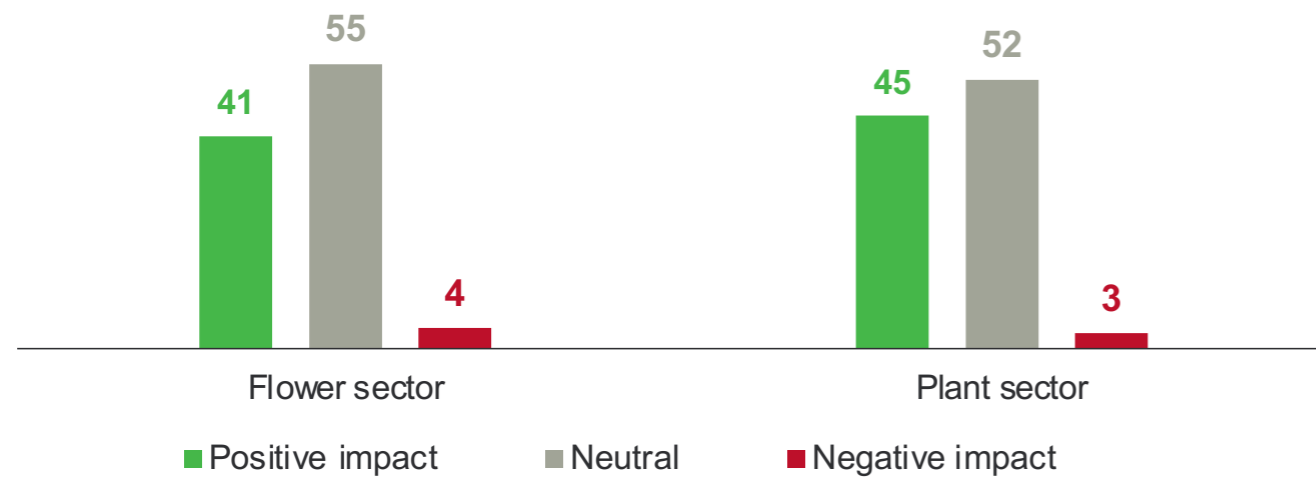
October 2023

Flower
Council 
Holland

Consumer perception

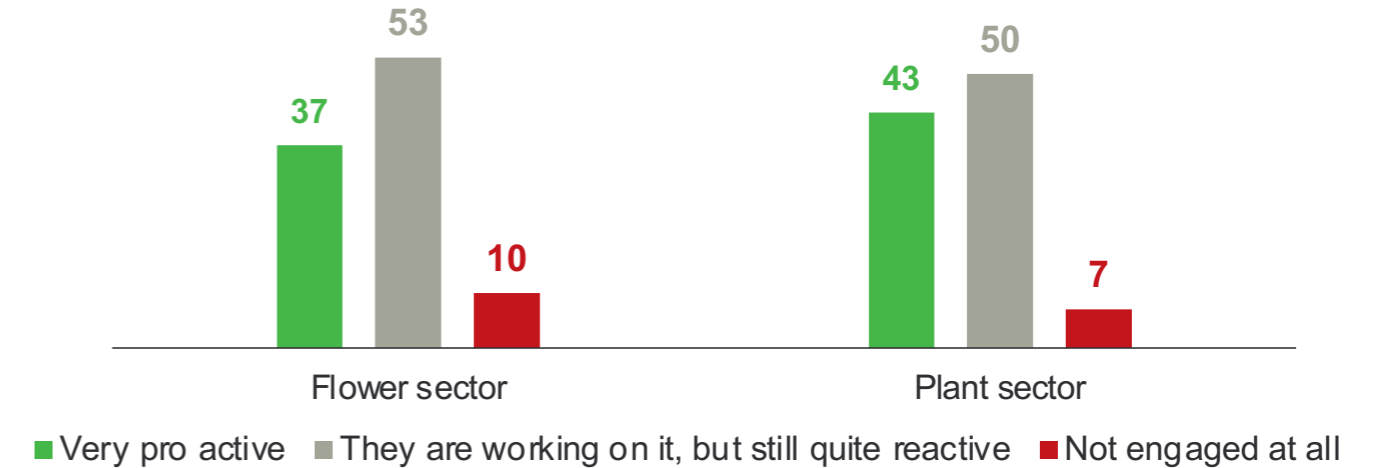
Impact

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 fertilizers 2. Health risks due to the usage of chemical pesticides and/or fertilizers 3. Excessive amount of packaging 4. Non-recyclable packaging 5. Emissions due to air transportation 	<ol style="list-style-type: none"> 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 3. Excessive amount of packaging 4. Non-recyclable packaging 5. Intensive farming (exhaustion of soil) 	<ol style="list-style-type: none"> 1. Water or land pollution due to usage of chemical pesticides and/or fertilizers 2. Excessive amount of packaging 3. Health risks due to the usage of chemical pesticides and/or fertilizers 4. Non-recyclable packaging 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
<ol style="list-style-type: none"> 1. Excessive amount of packaging 2. Water or land pollution due to usage of chemical 3. Non-recyclable packaging 4. Health risks due to the usage of chemical pesticides and/or fertilizers 5. Greenhouse gasses (e.g. CO2 emissions and nitrogen) 	<ol style="list-style-type: none"> 1. Excessive amount of packaging 2. Water or land pollution due to usage of chemical 3. Non-recyclable packaging 4. Health risks due to the usage of chemical pesticides and/or fertilizers 5. Greenhouse gasses (e.g. CO2 emissions and nitrogen) 	<ol style="list-style-type: none"> 1. Water or land pollution due to usage of chemical pesticides and/or fertilizers 2. Excessive amount of packaging 3. Health risks due to the usage of chemical pesticides and/or fertilizers 4. Non-recyclable packaging 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"> It is really hard to tell which flowers are bad ethically or for the environment They don't have enough information about where specific flowers are being grown They don't have enough information about the impact of the production and transportation of flowers When shopping, their mind is on saving money more than saving the planet They don't think about sustainability when buying flowers 	<ol style="list-style-type: none"> It is really hard to tell which houseplants are bad ethically or for the environment They don't have enough information about where specific houseplants are being grown They don't have enough information about the impact of the production and transportation of houseplants When shopping, their mind is on saving money more than saving the planet It is not part of their routine to think about sustainability when buying houseplants 	<ol style="list-style-type: none"> They don't have enough information about the impact of the production and transportation of garden plants It is really hard to tell which garden plants are bad ethically or for the environment They don't have enough information about where specific garden plants are being grown When shopping, their mind is on saving money more than saving the planet They are convinced they are already being sustainable by buying greenery such as garden plants

Labels

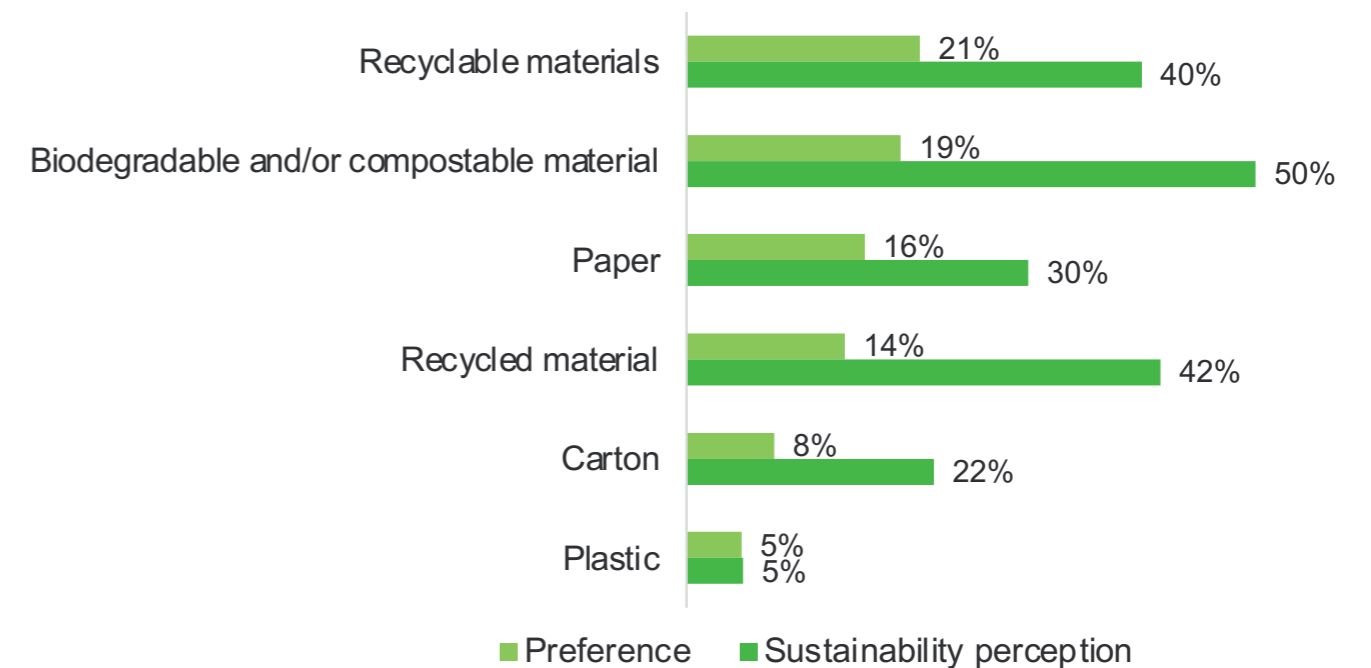
How often do consumers come across sustainability labels and does this help them to make a more sustainable choice?

59% has come across sustainability labels → of which → **32%** is helped by sustainability labels

41% has never come across sustainability labels → of which → **48%** thinks 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

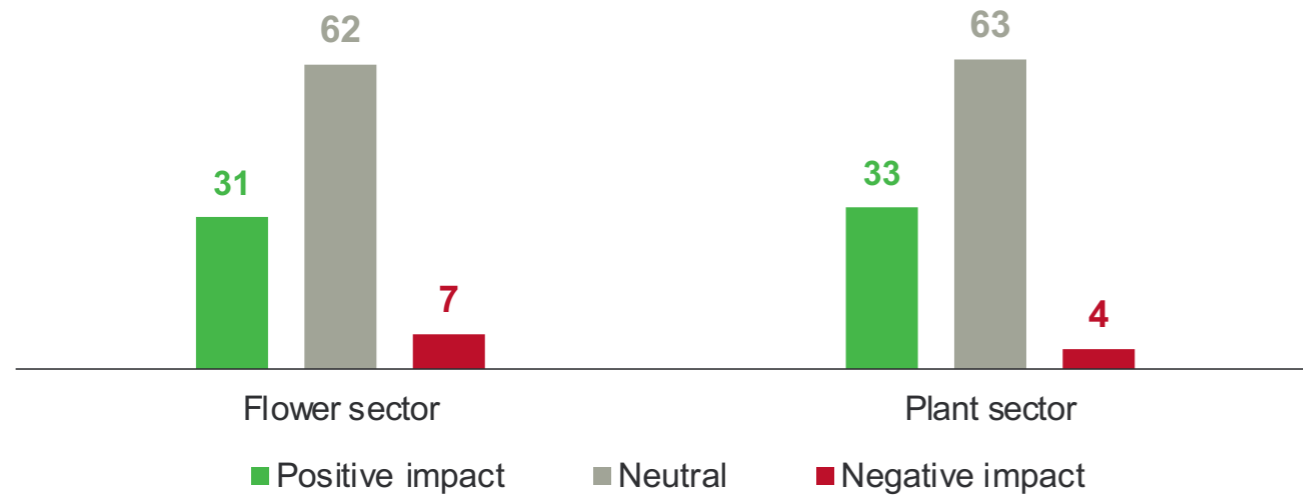
What proportion of consumers recently came across any communication expressions and how did this influence their perception?

Flowers	Houseplants	Garden plants
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

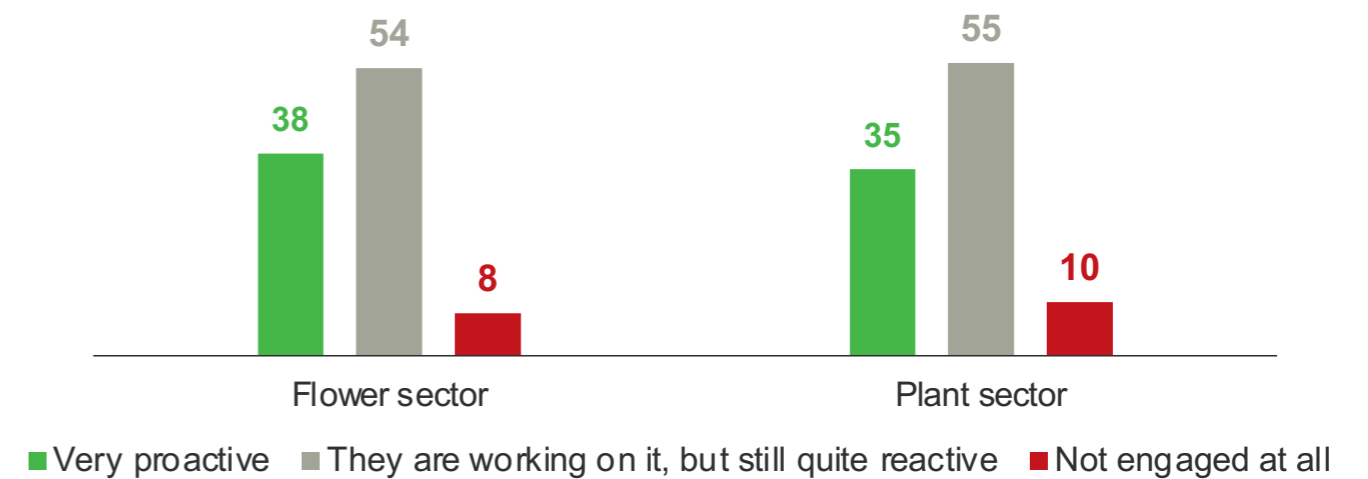
Impact

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"> Water or land pollution due to usage of chemical pesticides and/or fertilizers Non-recyclable packaging Excessive amount of packaging Health risks due to the usage of chemical pesticides and/or fertilizers Usage 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 fertilizers Non-recyclable packaging Excessive amount of packaging Health risks due to the usage of chemical pesticides and/or fertilizers Emissions due to air transportation 	<ol style="list-style-type: none"> Excessive amount of packaging Water or land pollution due to usage of chemical pesticides and/or fertilizers Non-recyclable packaging Intensive 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 packaging Excessive amount of packaging Water or land pollution due to usage of chemical pesticides and/or fertilizers Health risks due to the usage of chemical pesticides and/or fertilizers 	<ol style="list-style-type: none"> Excessive amount of packaging Greenhouse gasses (e.g. CO2 emissions and nitrogen) Non-recyclable packaging Water or land pollution due to usage of chemical Health risks due to the usage of chemical pesticides and/or fertilizers 	<ol style="list-style-type: none"> Non-recyclable packaging Excessive amount of packaging Greenhouse gasses (e.g. CO2 emissions and nitrogen) Water or land pollution due to usage of chemical pesticides and/or fertilizers Health risks due to the usage of chemical pesticides and/or fertilizers

Consumer perception

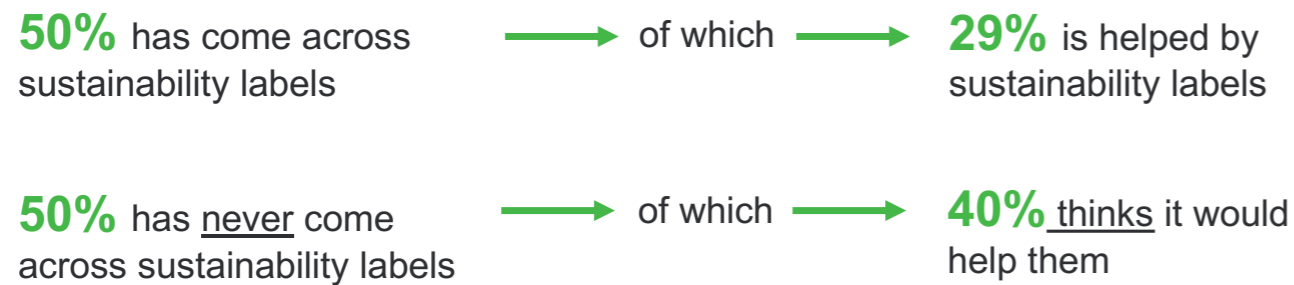
Barriers

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

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

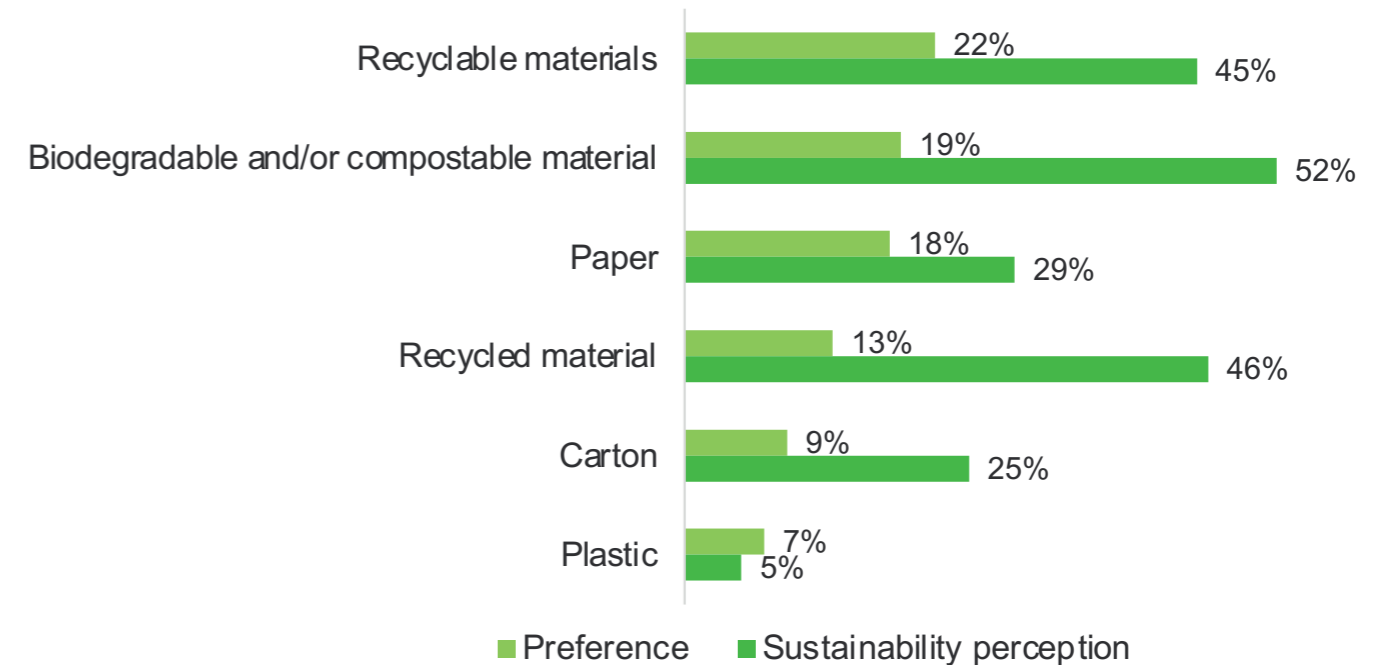
Labels

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



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?

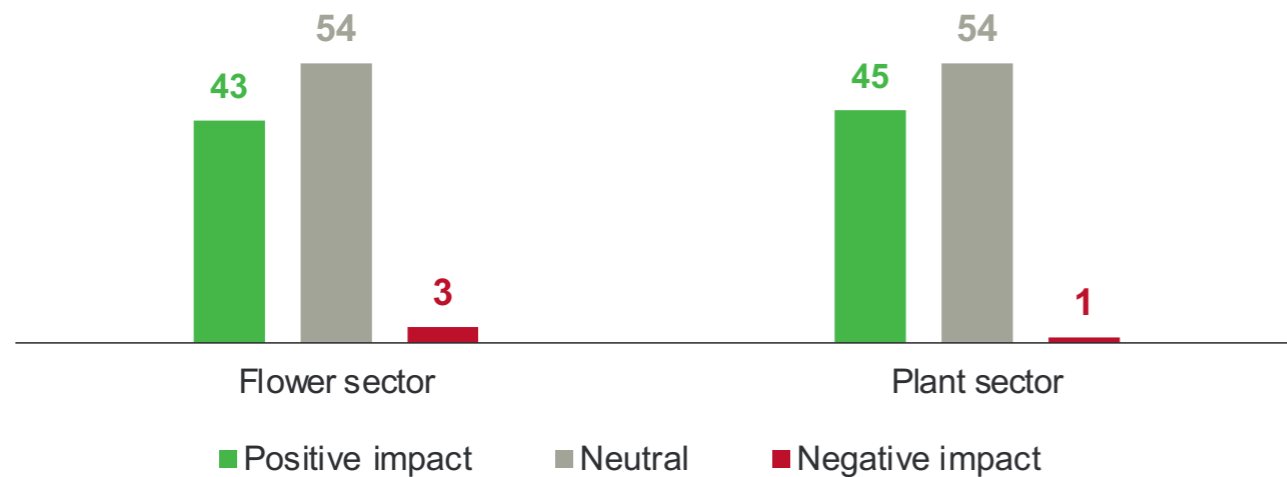
Flowers	Houseplants	Garden plants
33%	39%	38%
of which	of which	of which
23% is positively influenced 21% is negatively influenced	29% is positively influenced 25% is negatively influenced	18% is positively influenced 21% is negatively influenced



Consumer perception

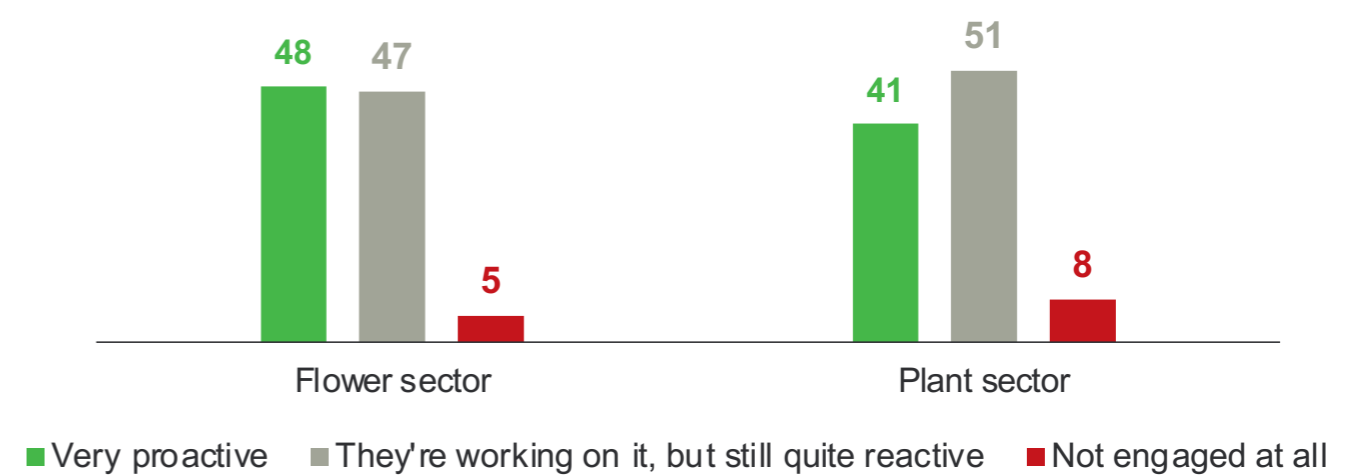
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Progress

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
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 pesticides and/or fertilizers	2. Water or land pollution due to usage of chemical pesticides and/or fertilizers	2. Non-recyclable packaging
3. Non-recyclable packaging	3. Non-recyclable packaging	3. Excessive amount of packaging
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. Health risks due to the usage of chemical pesticides and/or fertilizers
5. Bad employee conditions	5. Usage of fossil fuels for transportation	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. Non-recyclable packaging	1. Non-recyclable packaging	1. Non-recyclable packaging
2. Excessive amount of packaging	2. Health risks due to the usage of chemical pesticides and/or fertilizers	2. Excessive amount of packaging
3. Water or land pollution due to usage of chemical	3. Water or land pollution due to usage of chemical pesticides and/or fertilizers	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. Excessive amount of packaging	4. Plant waste
5. Flower waste	5. Bad employee conditions	5. Water 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

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

Houseplants

1. They don't have enough information about the impact of the production and transportation of houseplants
2. They don't have enough information about where specific houseplants are being grown
3. It is really hard to tell which houseplants are bad ethically or for the environment
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 houseplants

Garden plants

1. It is really hard to tell which garden plants are bad ethically or for the environment
2. When shopping, their mind is on saving money more than saving the planet
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 convinced they are already being sustainable by buying greenery such as garden plants

Labels

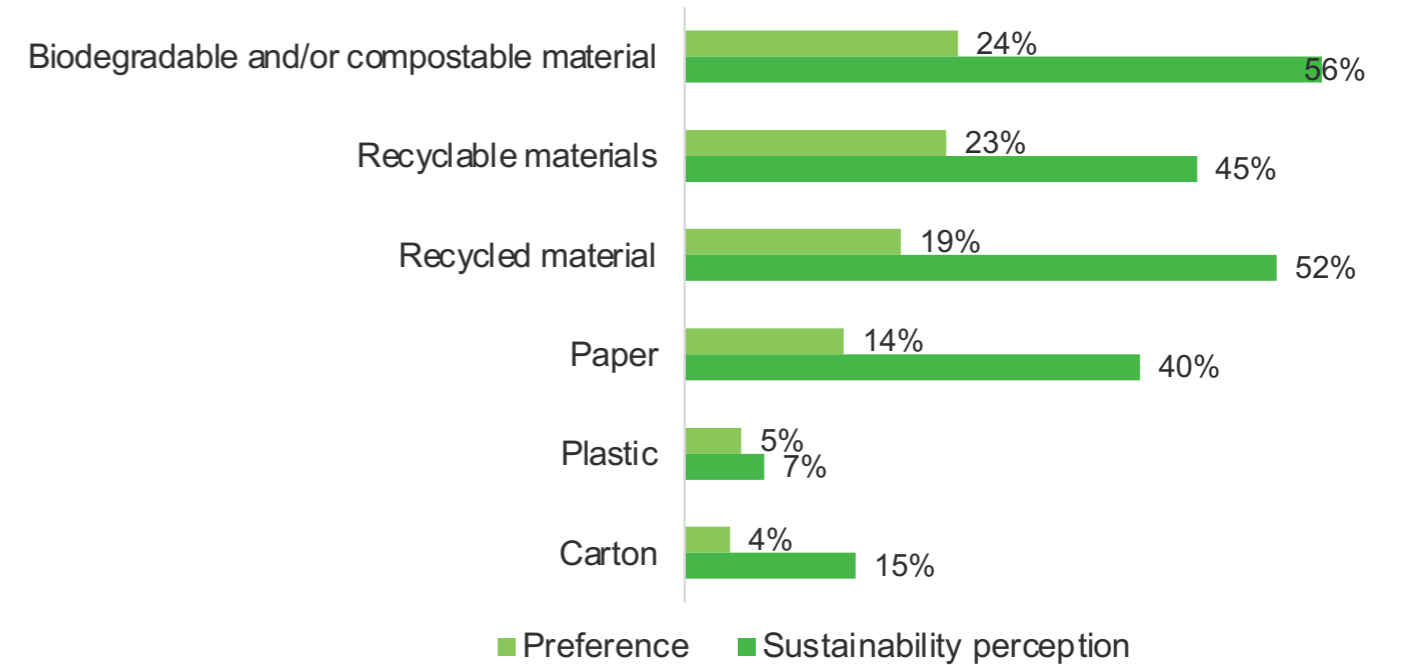
How often do consumers come across sustainability labels and does this help them to make a more sustainable choice?

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

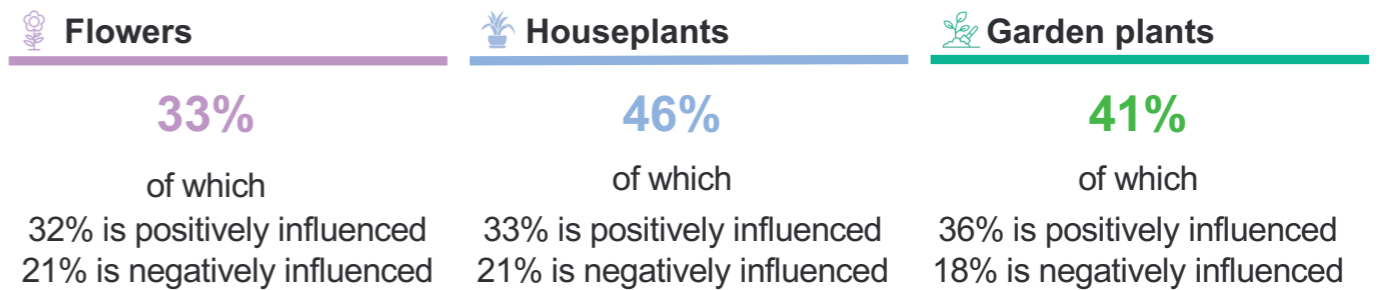
Which of these packaging materials do consumers prefer and which do they consider to be sustainable?



■ Preference ■ Sustainability perception

Communication

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

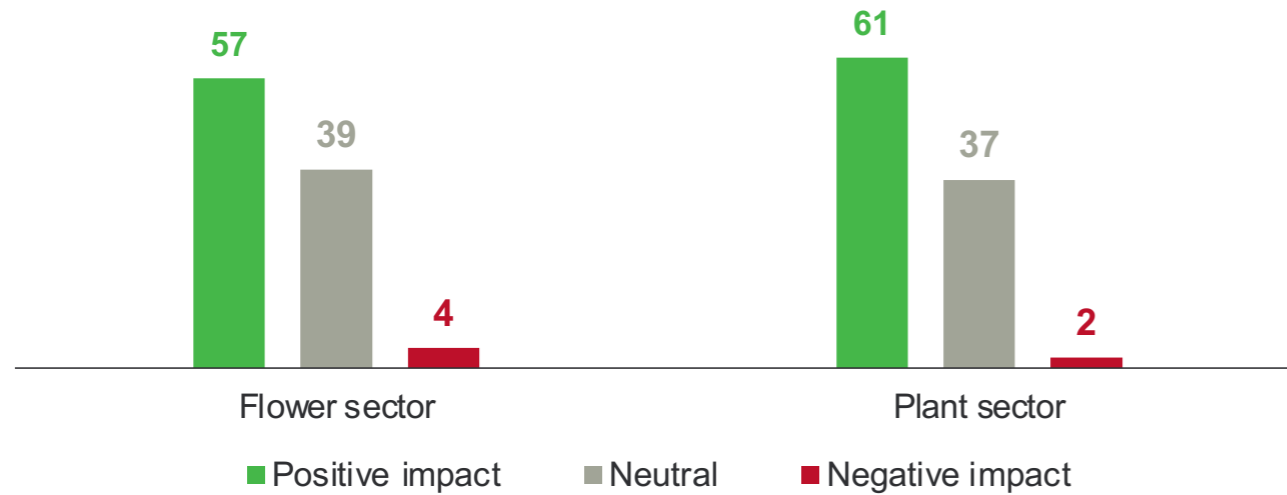


Consumer perception



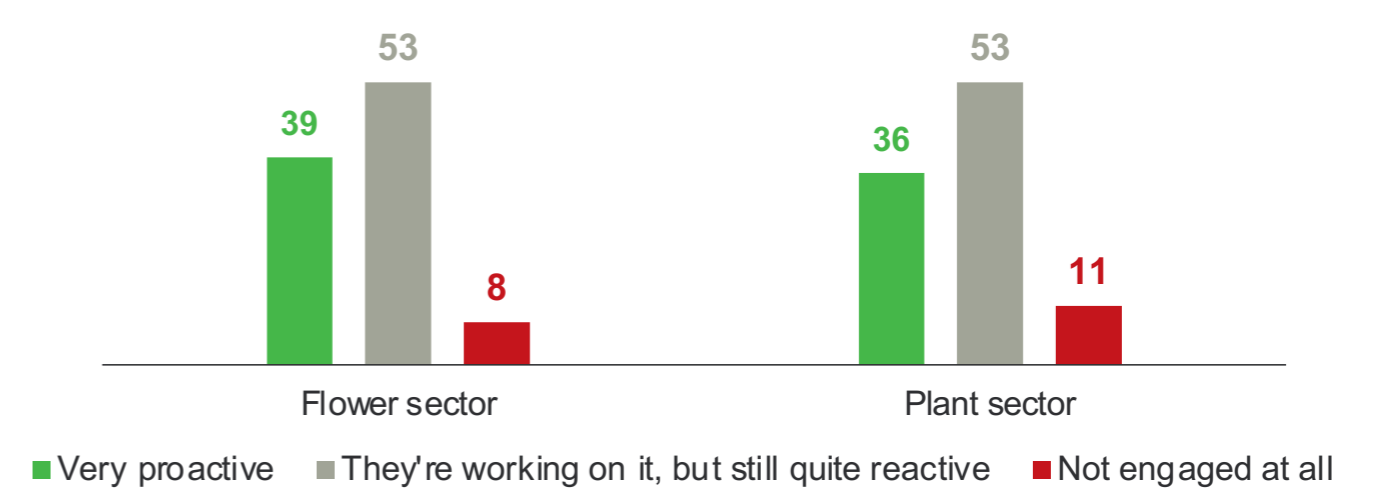
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What influence does the consumer think the floriculture sector has on a better future, by taking responsibility in the field of sustainability?



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
1. Water or land pollution due to usage of chemical pesticides and/or fertilizers	1. Health risks due to the 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. 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
3. Impact of (excessive) water usage	3. Impact of (excessive) water usage	3. Impact of (excessive) water usage
4. Excessive amount of packaging	4. Excessive amount of packaging	4. Excessive amount of packaging
5. Intensive farming (exhaustion of soil)	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. Water or land pollution due to usage of chemical pesticides and/or fertilizers	1. Impact of (excessive) water usage	1. Water or land pollution due to usage of chemical pesticides and/or fertilizers
2. Impact of (excessive) water usage	2. 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
3. Health risks due to the usage of chemical pesticides and/or fertilizers packaging	3. Excessive amount of packaging	3. Impact of (excessive) water usage
4. Intensive farming (exhaustion of soil)	4. Health risks due to the usage of chemical pesticides and/or fertilizers	4. Excessive amount of packaging
5. Excessive amount of packaging	5. Intensive farming (exhaustion of soil)	5. 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

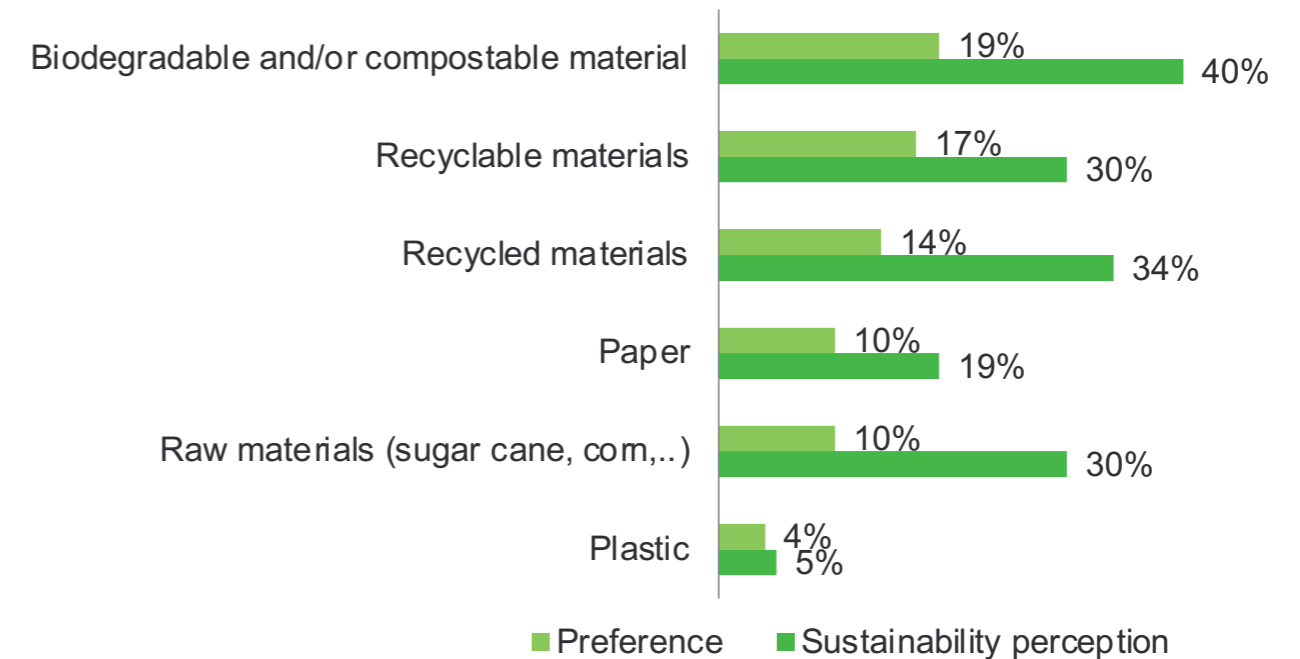
Labels

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

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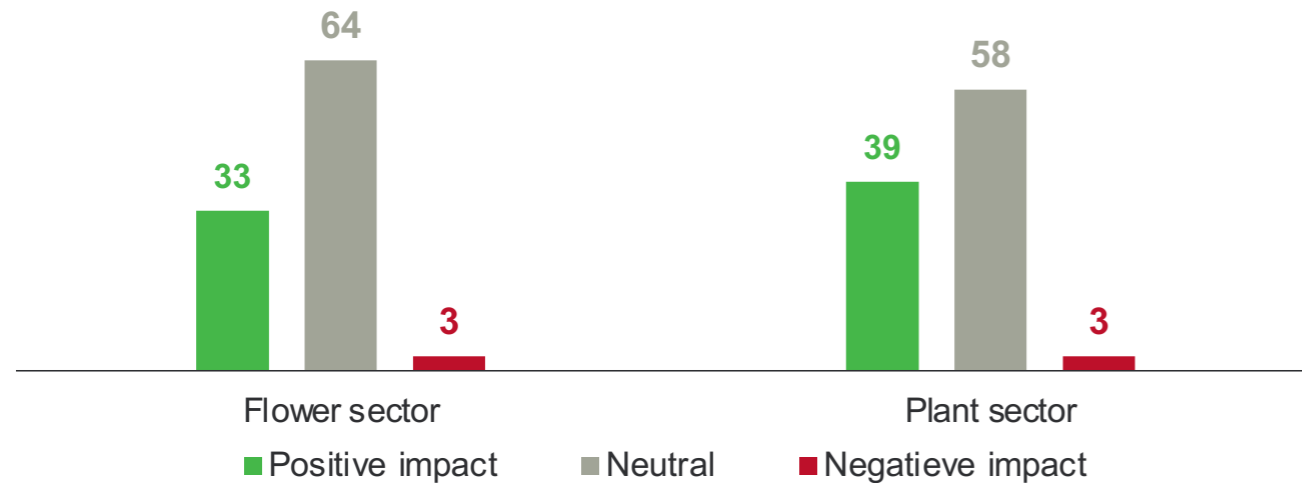
Flowers	Houseplants	Garden plants
53%	51%	53%
of which	of which	of which
32% is positively influenced 18% is negatively influenced	30% is positively influenced 21% is negatively influenced	26% is positively influenced 21% is negatively influenced



Consumer perception

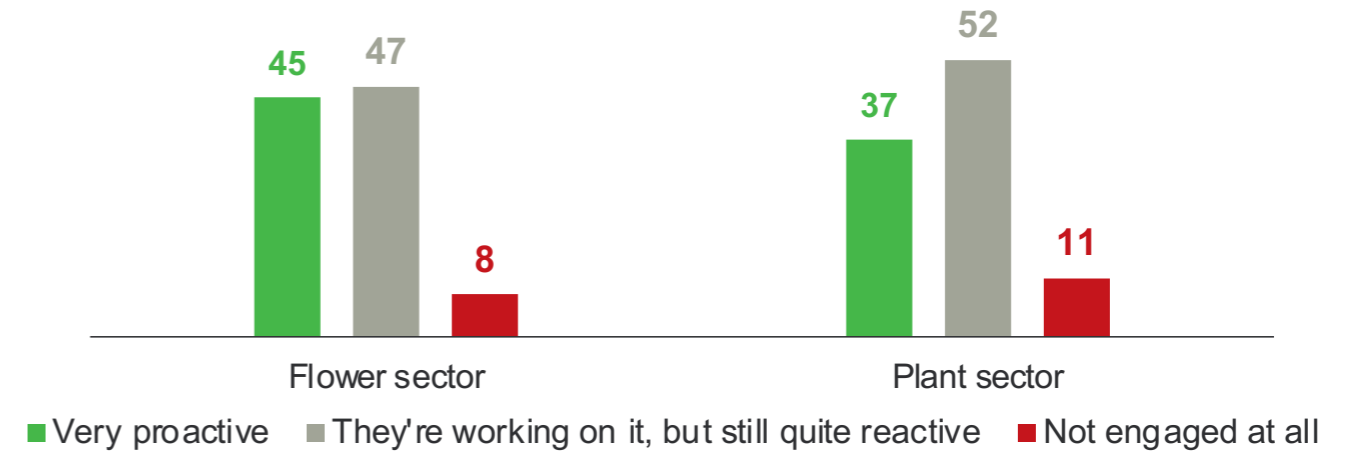
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What influence does the consumer think the floriculture sector has on a better future, by taking responsibility in the field of sustainability?



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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
1. Water or land pollution due to usage of chemical pesticides and/or fertilizers	1. Health risks due to the 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. Water or land pollution due to 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. Impact of (excessive) water usage	4. Loss of biodiversity	4. Impact of (excessive) water usage
5. Non-recyclable packaging	5. Impact of (excessive) water usage	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. Water or land pollution due to usage of chemical pesticides and/or fertilizers	1. Health risks due to the usage of chemical pesticides and/or fertilizers
2. 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. Water or land pollution due to usage of chemical pesticides and/or fertilizers
3. Non-recyclable packaging	3. Excessive amount of packaging	3. Excessive amount of packaging
4. Health risks due to the usage of chemical pesticides and/or fertilizers	4. Non-recyclable packaging	4. Non-recyclable packaging
5. Impact of (excessive) water usage	5. Impact of (excessive) water usage	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
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

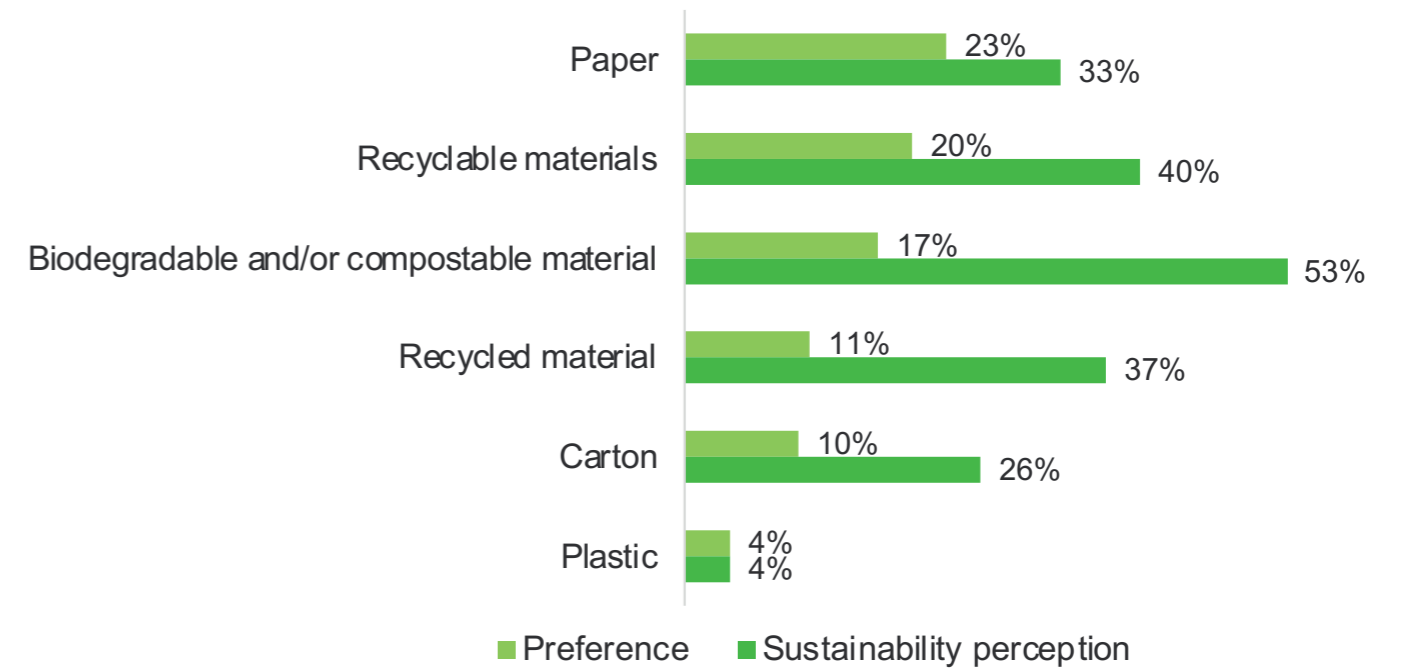
Labels

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?



■ 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
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

FLOWER COUNCIL OF HOLLAND

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