

Consumer Attitudes Towards Cut Flowers and Houseplants: Inc Impact of COVID-19 - UK - May 2020

Report Price: £1995.00 | \$2693.85 | €2245.17

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



“The COVID-19 pandemic has caused disruptions to all stages of the floriculture supply chain which operates at a global level and works inter-dependently to bring flowers and houseplants to key markets such as the UK, all-year round.”

– **Emily Viberg, Retail Analyst, 30 May 2020**

This report looks at the following areas:

- The impact of COVID-19 on future consumer confidence.
- Key consumer behaviours influenced by COVID-19
- The impact of COVID-19 on flowers and houseplants in the short-, medium- and long-term
- Tapping into the gifting market with houseplants
- How retailers can attract Millennials to flowers

**BUY THIS
REPORT NOW**

VISIT:
store.mintel.com

CALL:
EMEA
+44 (0) 20 7606 4533

Brazil
0800 095 9094

Americas
+1 (312) 943 5250

China
+86 (21) 6032 7300

APAC
+61 (0) 2 8284 8100

EMAIL:
reports@mintel.com

DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market

Consumer Attitudes Towards Cut Flowers and Houseplants: Inc Impact of COVID-19 - UK - May 2020

Report Price: £1995.00 | \$2693.85 | €2245.17

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Table of Contents

Overview

- What you need to know
- Key issues covered in the Report
- Products covered in this report

Executive Summary

The market

Consumers' confidence set to wane as uncertainty clouds future sentiment

Figure 1: "How would you generally describe your financial situation at the moment?", January 2018-March 2020

Mother's Day the most popular event for gifting flowers

Figure 2: Percentage of consumers who bought flowers as gifts for seasonal events in 2019 and 2020

Impact of COVID-19 on cut flowers and houseplants

COVID-19 set to disrupt the entire supply chain

Figure 3: Short-, medium- and long-term impacts of COVID-19 on the broader retail category, flower and houseplant sectors, 2020

Companies and brands

Advertising spend on flowers and houseplants grows in 2019

Figure 4: Total above-the-line, online display and direct mail advertising expenditure by all retailers, by year, 2015-19

Sustainability is a key area for innovation and launch activity

The consumer

Over half of consumers purchased flowers in the past year

Figure 5: Flowers and houseplants purchased in the past 12 months, March 2020

Houseplants attract a higher spend for last purchase compared to flowers

Figure 6: How much shoppers spent during their last purchase of flowers and houseplants, March 2020

Shoppers willing to spend more on flowers as gifts

Figure 7: Shopping behaviours for flowers, March 2020

Houseplants are a welcome addition to the home/workspace for wellbeing benefits

Figure 8: Shopping behaviours for Houseplants, March 2020

Consumers are interested in flowers/houseplants with sustainable wrappings/pots

Figure 9: Interest in flower and houseplant innovations, March 2020

What we think

Impact of COVID-19 on Cut Flowers and Houseplants

Short-, medium- and long-term impact on the industry

Figure 10: Short-, medium- and long-term impacts of COVID-19 on the broader retail category, flower and houseplant sectors, 2020

Short term

Medium term

Long term

Opportunities and Threats

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Consumer Attitudes Towards Cut Flowers and Houseplants: Inc Impact of COVID-19 - UK - May 2020

Report Price: £1995.00 | \$2693.85 | €2245.17

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Lost trade in peak season will not be replaced, leading to a strain on retailers

Help consumers bring the outdoors indoors

Encourage consumers to trade up even when disposable incomes are squeezed

Figure 11: The Flower Council of Holland's 'Let Hope Bloom' campaign, 2020

Open direct channels of distribution to consumers

Figure 12: Plant Pack delivery service, 2020

Engage with consumers online with DIY workshops and Q&A

Tap into the sense of community post COVID-19

Figure 13: Changes in shopping habits, May 14-May 21, 2020

Figure 14: Early Hours Ltd installation for the NHS, 2020

Impact on the cut flowers and houseplant market

A perfect storm

Disruption in the supply chain

Local and independent florists will struggle

Shifts in consumer behaviour

Seeing family and friends is a priority post lockdown

Figure 15: Activities consumers look forward to post lockdown, April 30-May7, 2020

Behaviours shift online

A COVID-19 related recession will impact key consumer groups

Consumers take up traditional hobbies in lockdown

How a COVID-19 recession will reshape the industry

Consumers cut back on non-essential spending

Figure 16: Changes in shopping habits due to COVID-19, May 14-May21, 2020

Consumers worry about the impact on UK economy

Figure 17: Consumers worry about impact of COVID-19 on cost of living, May 14-May 21, 2020

Impact on the marketing mix

Price:

Product:

Promotion:

Place:

COVID-19: UK context

Issues and Insights

How can retailers attract younger consumers to buying flowers/houseplants?

The facts

The implications

Create an experience and make it personal

Make it trendy and 'Instagrammable'

How can retailers tap into the gifting market with houseplants?

The facts

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Consumer Attitudes Towards Cut Flowers and Houseplants: Inc Impact of COVID-19 - UK - May 2020

Report Price: £1995.00 | \$2693.85 | €2245.17

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

The implications

Promote wellbeing

Collaborate to promote houseplant ranges

The Market – What You Need to Know

Consumers' confidence set to wane as uncertainty clouds future sentiment

Mother's Day a popular event to buy flowers

Changing trends in the population structure

Market Drivers

Real wage growth in 2019 outpaces inflation

Figure 18: Real wage growth -Average weekly earnings vs inflation, January 2016-February 2020

Prices are the biggest concern post-Brexit

Figure 19: Consumer views on the impact of the EU referendum, January 2020

Consumers' confidence set to wane as uncertainty clouds future sentiment

Figure 20: How would you generally describe your financial situation at the moment?", January 2020

Changing trends in the population structure

Figure 21: Changes in population structure, 2019-29

Figure 22: Trends in the age structure of the UK population, 2019-29

Weddings cancelled amid COVID-19

Figure 23: Number of marriages in thousands in England and Wales, 2003-17

Deaths rise during COVID-19 but funerals to be held virtually

Figure 24: Number of deaths in thousands in England and Wales, 2003-2016

Figure 25: Number of marriages and deaths, in thousands, 2003-16

Mother's Day a popular event to buy flowers for

Figure 26: Percentage of consumers who bought flowers as gifts for seasonal occasions in 2019 and 2020

Regulations and policies impacting the market

EU Plant Health Regulations

Companies and Brands – What You Need to Know

Advertising expenditure on flowers and houseplants increased 12% in 2019

TV dominated advertising spending on flowers and houseplants

Sustainability is a key area for innovation and launch activity.

Launch Activity and Innovations

Cut flowers are an important gift during seasonal events

Morrisons unicorn and llama inspired flowers

Figure 27: Morrisons Llama and Unicorn flowers, 2019

Lush's Valentine's Day pop-up

Figure 28: Lush Flowers and houseplants at Oxford Street, 2020

Wellbeing and health trend driving demand in houseplants

Indoor Garden Design and IKEA collaborate at Chelsea Flower Show 2019

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Consumer Attitudes Towards Cut Flowers and Houseplants: Inc Impact of COVID-19 - UK - May 2020

Report Price: £1995.00 | \$2693.85 | €2245.17

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 29: Indoor Garden design installation in collaboration with IKEA, 2018

Sustainability a key area for innovation

Waitrose's 'Unpacked' flowers

The Parfum Flower Company reveals dried garden roses bouquets

Figure 30: Dried garden roses from The Parfum Flower Company, 2019

FloraLife reveals recyclable flower food sachets

Figure 31: Recyclable flower food sachets by FloraLife, 2019

IKEA and Tom Dixon urban farming concept

Figure 32: 'Gardening Will Save the World' show garden designed by Tom Dixon and Ikea, 2019

Pass it On Plantable candles

Figure 33: Plantable candles by Pass It On, 2019

Online solutions for convenience

Interflora and Alexa

Figure 34: Interflora and Alexa tie-up, 2019

Homebase collaborate with SmartPlant app

Figure 35: Smartplant collaboration with Homebase, 2019

Specialists launches own-label houseplant ranges

Dobbies' 'easy houseplant' range

Figure 36: Dobbies 'Easy care' houseplant range, 2019

W6 Garden Centre invests in new plant section

Figure 37: W6GC's Green Room, November 2019

Interflora collaboration with Slug and lettuce

Figure 38: Interflora and Slug and Lettuce collaboration, 2019

Bloomscape plants available on west elm

Non-specialists tap into the blooming houseplant and flower market

Jo Malone masterclasses

M&S Little Gardens

Figure 39: M&S' 'Little Gardens' seedling kit, 2020

IKEA easy care houseplants

Figure 40: Easy care plants, 2019

Lush Fresh & Flowers in Paris

Figure 41: Lush Fresh & Flowers in Paris, 2019

Selfridges flower collaboration with Aoyama

Advertising and Marketing Activity

Advertising spend on flowers and houseplants grows in 2019

Figure 42: Total above-the-line, online display and direct mail advertising expenditure by all retailers, by year, 2019

Lidl biggest advertiser of flowers and houseplants in 2019

Figure 43: Total above-the-line, online display and direct mail advertising expenditure by leading retailers, 2015-19

TV dominates ad spend

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Consumer Attitudes Towards Cut Flowers and Houseplants: Inc Impact of COVID-19 - UK - May 2020

Report Price: £1995.00 | \$2693.85 | €2245.17

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 44: Total above-the-line, online display and direct mail advertising expenditure by all retailers, by media type, 2019

Key marketing campaigns

'We need more flowers' campaign by Flower Council of Holland

Figure 45: We need more flowers campaign by Funnyhowflowersdothat, 2019

Thanks Plants! Campaign by Flower Council of Holland

Figure 46: Thanks plants campaign by thejoyofplants, 2018

The Consumer – What You Need to Know

Flowers and houseplants are enjoyed by consumers across age groups

Higher spend level on houseplants compared to flowers for consumers last purchase

Flowers and houseplants are purchased multiple times a year

Supermarkets the go-to place for flowers and houseplants

Shoppers are willing to spend more on flowers as a gift

Consumers are interested in flowers/houseplants with sustainable wrapping/pots

Who Buys Flowers and Houseplants

More than half of consumers purchased flowers in the past year

Figure 47: Consumers who have purchased flowers and/or houseplants in the past 12 months, March 2020

Broad age appeal for both flowers and houseplants

Figure 48: Consumers who have purchased flowers and/or houseplants in the past 12 months, by age group, March 2020

How Often They Buy Flowers and Houseplants

Shoppers buy flowers and houseplants multiple times in a year

Figure 49: How often consumers have purchased flowers and/or houseplants in the past 12 months, March 2020

16-24s most frequent buyers for flowers and houseplants

Figure 50: How often consumers have purchased flowers and/or houseplants in the past 12 months, by age group, March 2020

How They Shop for Flowers and Houseplants

Stores capture the majority of flower and houseplant purchases

Figure 51: How consumers have purchased flowers and/or houseplants in the past 12 months, March 2020

16-24s shop for flowers and houseplants online via smartphones

Figure 52: How consumers have purchased flowers and/or houseplants in the past 12 months, by age group, March 2020

Which Retailer They Use to Buy Flowers and Houseplants

Supermarkets are the go-to place for flowers and houseplants

Figure 53: Where consumers have purchased flowers and/or houseplants in the past 12 months, March 2020

How Much is Spent on Flowers and Houseplants

Shoppers spend more on houseplants than flowers for their last purchase

Figure 54: How much shoppers spent during their last purchase on flowers and/or houseplants, March 2020

16-34s spend the most on flowers

Figure 55: How much shoppers spent during their last purchase on flowers, by age group, March 2020

16-24s spend most on houseplants

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Consumer Attitudes Towards Cut Flowers and Houseplants: Inc Impact of COVID-19 - UK - May 2020

Report Price: £1995.00 | \$2693.85 | €2245.17

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 56: How much shoppers spent during their last purchase on houseplants, by age group, March 2020

Shopping Behaviours for Flowers

Gifting provides further opportunities for retailers

Figure 57: Shopping Behaviours for Flowers, March 2020

Older consumers are willing to spend more on flowers for gifting

Figure 58: Shopping behaviours for Flowers, by age group March 2020

16-34s prefer to buy locally sourced flowers

Figure 59: Shopping Behaviours for Flowers, by age group, March 2020

Young consumers want more personalisation options and rely on retailers for advice

Figure 60: Shopping Behaviours for Flowers, by age group, March 2020

Shopping Behaviours for Houseplants

Houseplants are a welcome addition to the home/workspace for its wellbeing benefits

Figure 61: Shopper Behaviours for Houseplants, March 2020

Older consumers think houseplants are good when space is limited

Figure 62: Shopper Behaviours for Houseplants, by age group, March 2020

16-34s use social media for inspiration and rely on retailers for advice

Figure 63: Shopping Behaviours for Houseplants, by age group, March 2020

Interest in Innovations

Consumers interested in flowers/houseplants with sustainable wrapping/pots

Figure 64: Interest in flower and houseplant innovations, March 2020

16-24s interested in innovations focused on longevity

Figure 65: Interest in flower and houseplant innovations, by age group, March 2020

25-44 age group interested in long-term care for houseplants and flowers

Figure 66: Interest in flower and houseplant innovations, by age group, March 2020

Appendix – Data Sources, Abbreviations and Supporting Information

Abbreviations

Consumer research methodology

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com