

INTERNATIONAL

# FRESH PRODUCE

ASSOCIATION

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**2024 Australia**

**Floral Industry Brand**

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## Who we are:

International Fresh Produce Association (IFPA) is the leading global trade association representing companies in the fresh produce and floral supply chain.

## We are here to:

- advocates for members and industry;
- connects individuals and organizations with ideas, data and with each other;
- guides with education, insight, expertise, and solutions.



## Floral Industry Branding

In today's fast-paced world, people have many options for gifts and small acts of self indulgence. But where will they spend their dollars tomorrow? The floral industry's brand is vital in capturing consumers' attention, preference, and loyalty.

**Why it matters:** Understanding our brand is crucial. By resonating with consumers, we can increase our market share and compete against other products.

**The big picture:** A brand is shaped by consumer perception and every aspect of the industry. And to win the fight, floral must be ready to compete with confections, beauty products, home décor, and much more.

**The bottom line:** Consumer feedback helps us understand brand perception and increases our ability to compete.



## Understanding Brand Perception

Brand perception is crucial in developing relationships with customers and winning their loyalty.

**Why it matters:** Consumers always consider their emotional connection when choosing between items that fulfil a similar purpose whether it be hunger in the produce category or indulgence in the floral category.

**The big picture:** Understanding the personality and attributes of our industries helps us connect with consumers.

**The bottom line:** Leverage industry personality and attributes to help shape your brand perception with consumers.



# A guide for marketers

## What this research tell us:

- While the reputation of the floral industry is favorable and can be strengthened in marketing by pairing it with the produce industry.
- The momentum of the floral industry lags behind all other benchmarked industries except meat. It can benefit by demonstrating innovations in breeding and growing as well as showing flowers in modern settings.
- Floral marketing can build off the industry's personality of being friendly and fun– “flowers should be everywhere people gather.”
- There is an opportunities to build on innovation. This matters to consumers, yet the floral industry is not leveraging this attribute.
- The floral industry is attractive to Gen Z who sees it having momentum, this can aid the industry in attracting the best talent.
- Gen Z and Millennials have a favorable impression of the floral industry allowing us to market to these groups.



# Methodology and Sample Composition

The study was conducted using an online methodology, with all fieldwork conducted on the Russell Research survey website. A total of 4,533 interviews were conducted for the study from February 9 – 28, 2024. Participants were sourced from leading online research panels.

To qualify for study inclusion, respondents were screened to meet the following qualifications:

- Age 18 - 78
- Primary or shared responsibility for purchasing groceries for household
- Purchase groceries once a month or more often
- Typically purchase groceries at a supermarket/grocery store or online retailer
- Reside within the United States, Brazil, the United Kingdom, Germany, China or Australia
- Does not work in a competitive industry

All research was carried out in compliance with all relevant legal and ethical requirements within the United States and in compliance with ISO 20252:2019.



# Floral Australia Summary

- Consumer impressions of the *floral industry in Australia* are favorable although it lags behind all benchmarked industries except fitness.
  - 54% respondents have a favorable impression
  - 39% of respondents believe the *floral industry* is 'on its way up' or 'improving.'
  - The floral industry has a favorable reputation.

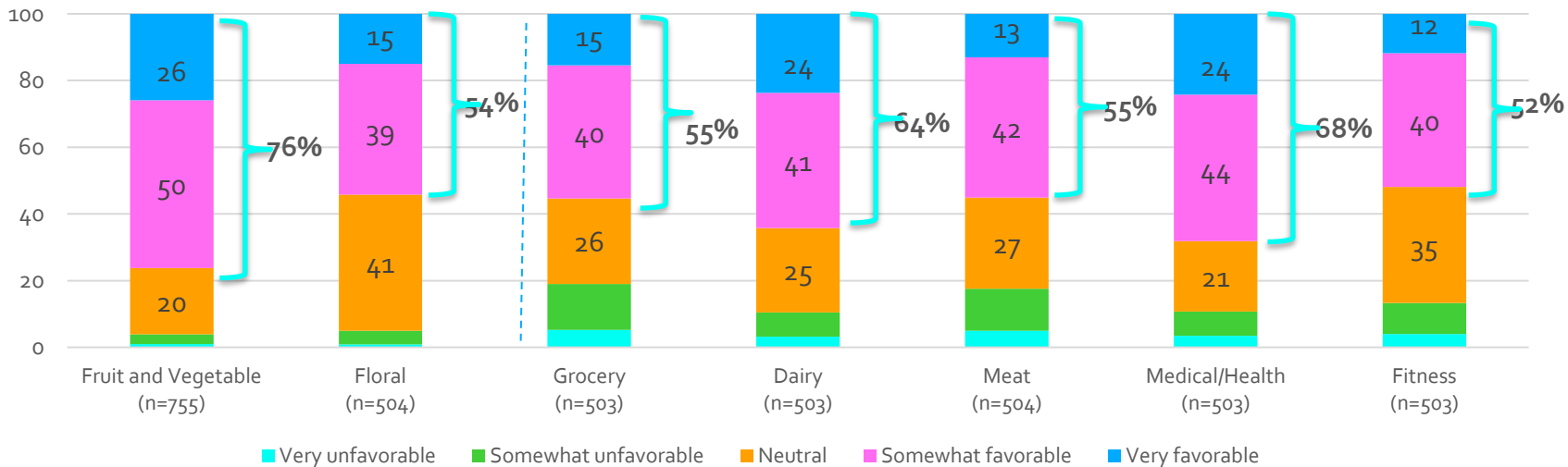
<b>Critically important for the floral industry</b>	<b>Floral Industry Personality Traits</b>
Offers unique products Is trustworthy.	<ul style="list-style-type: none"><li>• Friendly</li><li>• Fun</li><li>• Exotic</li><li>• Trendy</li></ul>



# Australian consumers have a favorable impression of the floral industry although it lags behind all benchmarked industries except fitness.

**TIP:** The floral industry can use produce and grocery in messaging to receive a lift from their halo.

### Overall Industry Impressions



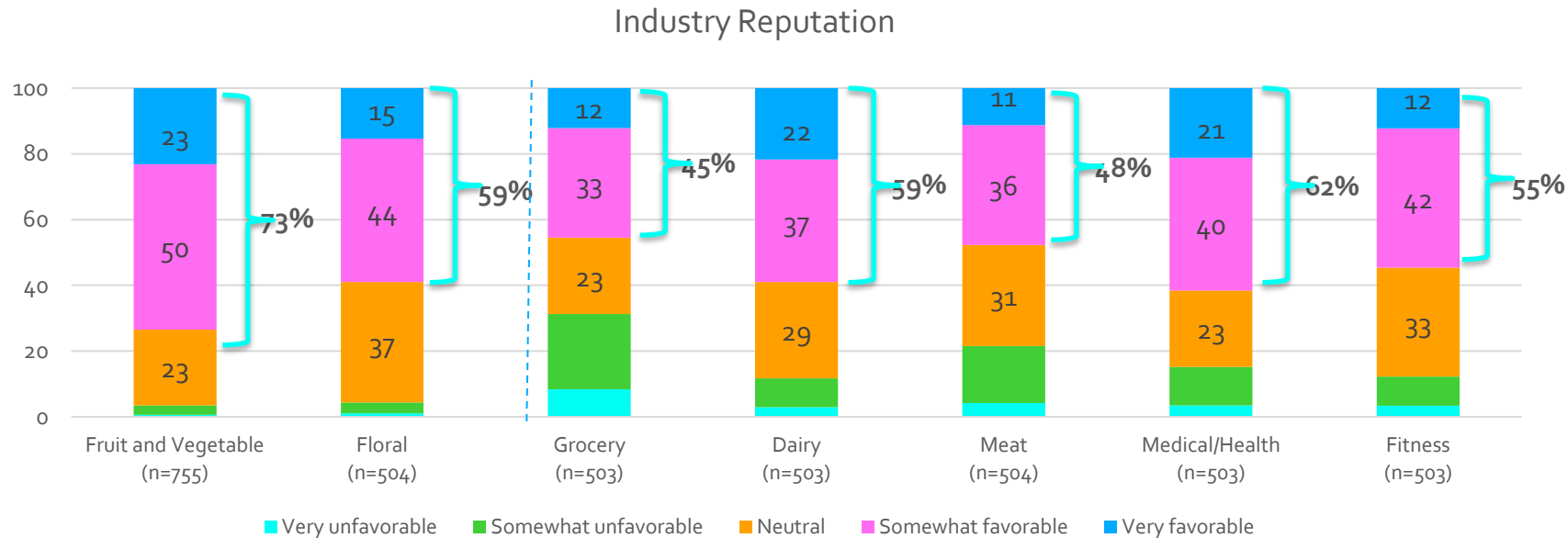
Base: Total Australia Respondents Evaluating Industry  
3. What is your overall impression of the [INSERT INDUSTRY]?





## Reputation of the floral industry is on par with dairy and lags behind produce and medical.

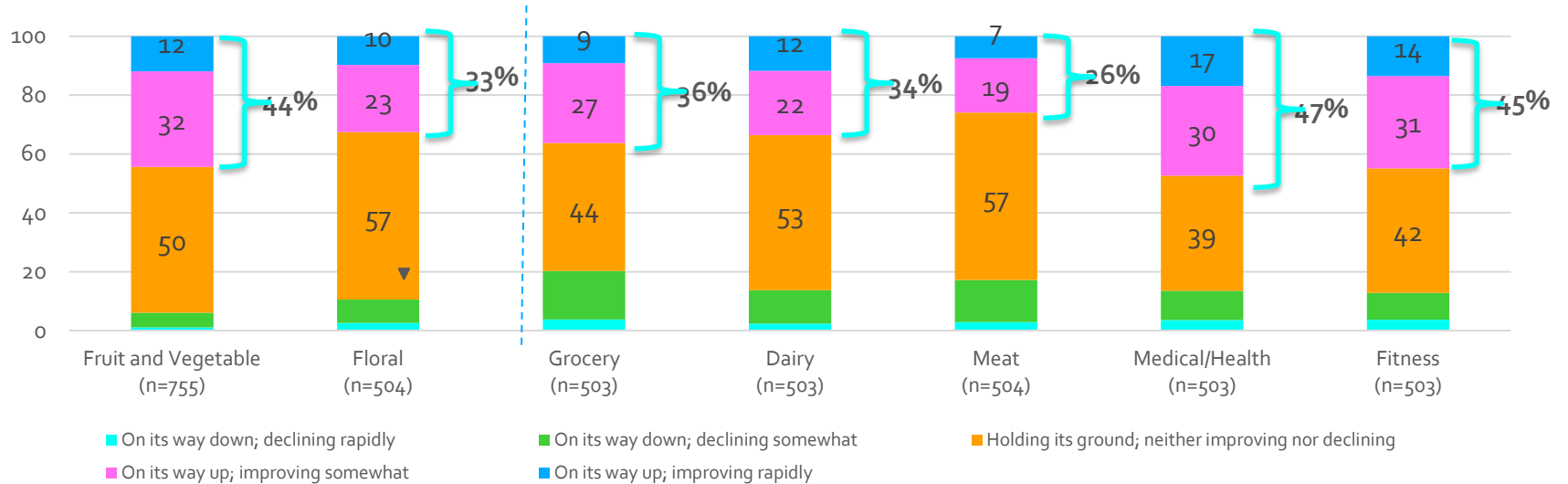
**TIP:** The floral industry can use produce in messaging to receive a lift from their halo.



## Most consumers view the floral industry as stagnant.

**TIP:** This is an opportunity to message consumers on technology, innovation and sustainability efforts within the industries.

Industry Momentum



Base: Total Australia Respondents Evaluating Industry

5: When you think about certain industries, some seem to be on their way up and have a lot going for them, while others don't. Which of these statements best describes how you feel about the [INSERT INDUSTRY]?



# Australia Floral Industry Drivers



# Relative Importance for Floral Industry

## Relative Importance

### What is it?

It is an extension of regression analysis that allows us to assess which attributes are most important and exactly how much more important one is than another.

### The most important factors to Consumers in Australia when evaluating the floral industry are:

Offers unique products  
Is trustworthy

	Relative Importance	Rank Order
Total Australia Respondents Evaluating Floral Industry	(504)	
Offers unique products and experiences	11.92	1
Is trustworthy	11.13	2
Is transparent in its production/service methods	8.95	3
Offers affordable options	8.30	4
Is innovative	8.30	5
Adapts quickly to meet the needs of consumers	8.26	6
Creates products or services worth paying extra for	6.12	7
Values diversity, equity and inclusion	5.69	8
Attracts top talent	5.57	9
Uses technology wisely	5.44	10
Makes room for a wide variety of brands	4.43	11
Promotes public health	4.37	12
Is mindful of the environment	4.09	13
Promotes individual health	2.92	14
Treats employees fairly	2.76	15
Helps solve some of society's most pressing problems	1.74	16



# Stated vs. Relative Importance – Australia Floral Industry

The results of the Relative Importance Analysis are compared to what consumers state is important to them and plotted on a quadrant map. From this map, three important groupings of attributes are defined as follows:

## Critically Important

(High Relative / High Stated Importance)

- **These are strong positioning attributes if an industry can deliver in these areas.**
  - ✓ Is trustworthy
  - ✓ Offers affordable options
  - ✓ Adapts quickly to meet the needs of consumers
  - ✓ Is transparent in its production/service methods

## Hidden Opportunities

(High Relative / Low Stated Importance)

- **These drivers may not be expressed but are important positioning attributes.**
  - ✓ Is innovative
  - ✓ Offers unique products and experiences

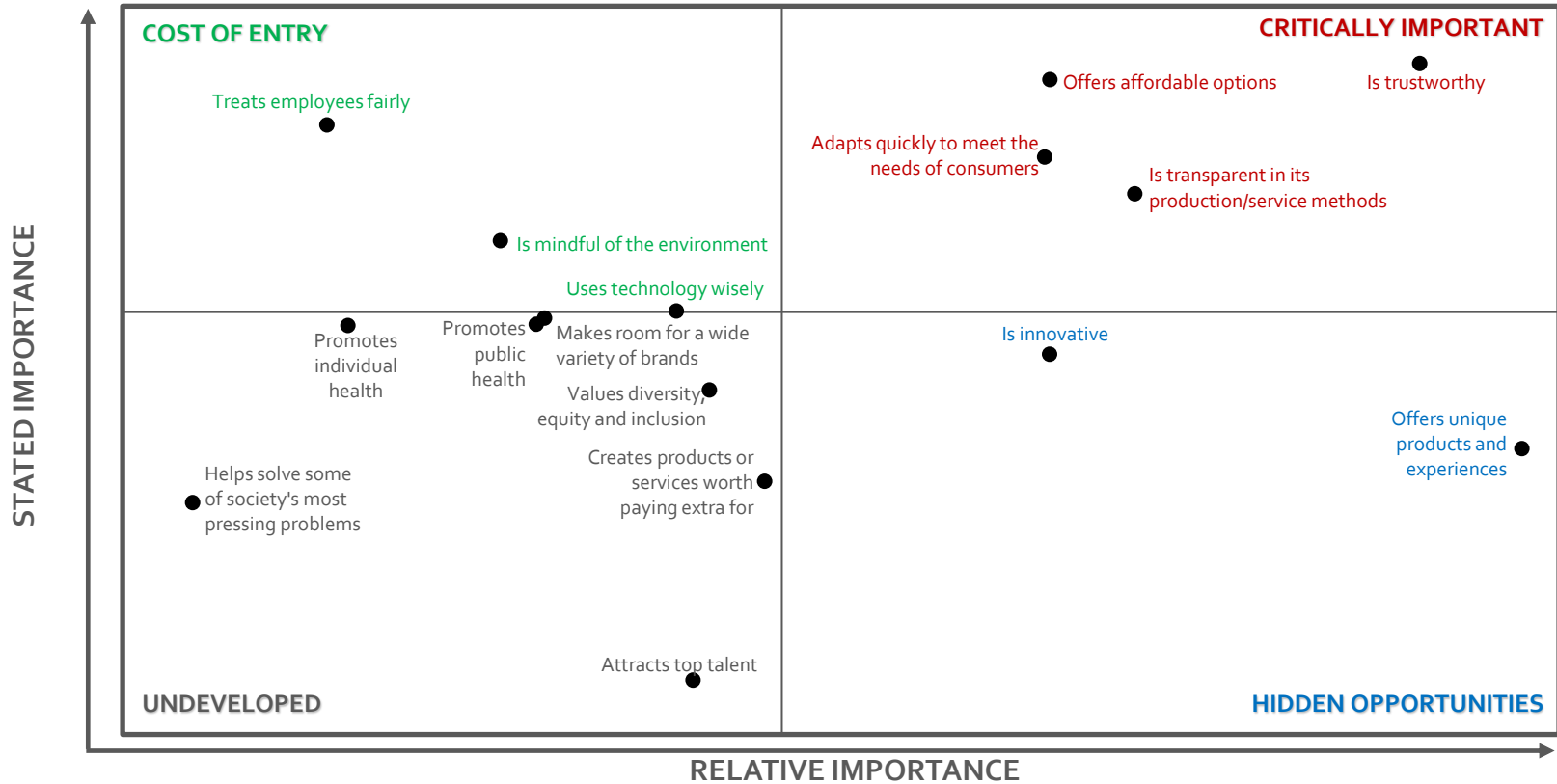
## Cost of Entry

(Low Relative / High Stated Importance)

- **These are important for all category industries to deliver. They are necessary but provide no leverage.**
  - ✓ Treats employees fairly
  - ✓ Is mindful of the environment
  - ✓ Uses technology wisely



# Stated vs. Relative Importance – Australian Floral Industry

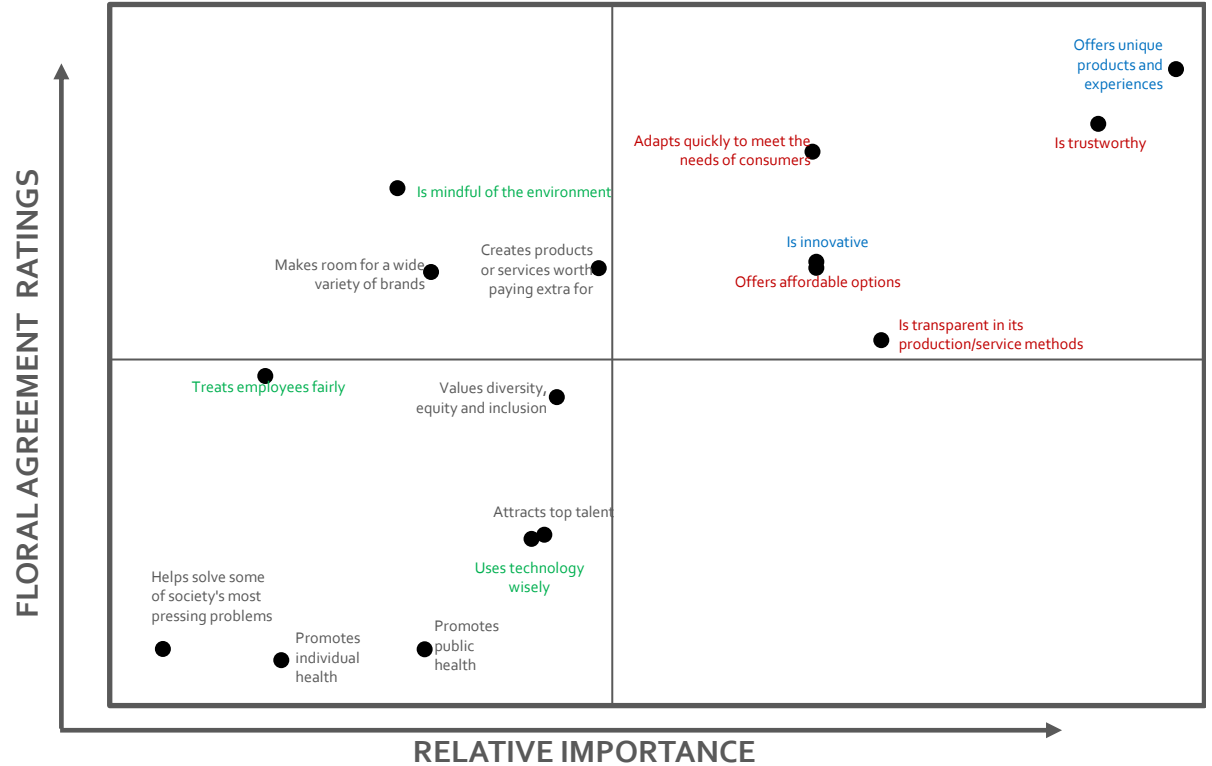


# Relative Importance vs. Floral Agreement Ratings

The relative importance of each statement and respondents' agreement that the industry portrays that statement was plotted on this map.

Attributes on the right side are most important to respondents.

**It appears the floral industry is currently delivering on the most important drivers in Australia.**



# Australian Floral Industry Personality



AI Chosen Image to Depict  
Floral Industry

	Fruit and Vegetable	Floral	Grocery	Dairy	Meat	Medical/Healthcare	Fitness
Total Australia Respondents Evaluating Industry	(755)	(504)	(503)	(503)	(504)	(503)	(503)
	%	%	%	%	%	%	%
Consistent	37	21	29	37	36	27	23
Simple	37	19	24	33	24	8	11
Friendly	36	42	27	29	16	24	30
Trustworthy	35	21	22	34	23	40	17
Approachable	31	26	26	25	19	28	23
Honest	28	19	16	27	18	29	12
Classic	27	25	17	33	28	12	5
Expert	24	21	18	27	29	52	27
Confident	22	20	24	23	24	36	41
Budget-Conscious	20	7	22	14	12	9	6
Casual	18	12	15	11	11	5	12
Modern	18	23	27	19	18	35	33
Accepting	16	14	17	13	14	22	20
Fun	15	32	9	11	7	4	33
Adventurous	8	16	7	5	9	6	22
Exotic	8	28	4	3	4	1	3
Trendy	7	26	8	7	6	4	39
Formal	5	17	7	7	8	22	3
Boring	4	3	8	5	5	4	6
Uptight	3	3	10	5	6	9	9
Outdated	3	5	9	11	14	9	5



4. Imagine for a moment the [INSERT INDUSTRY] was a person. What types of words and/or descriptions would you use to describe that person? Please select as many or as few adjectives and/or descriptors you'd like.





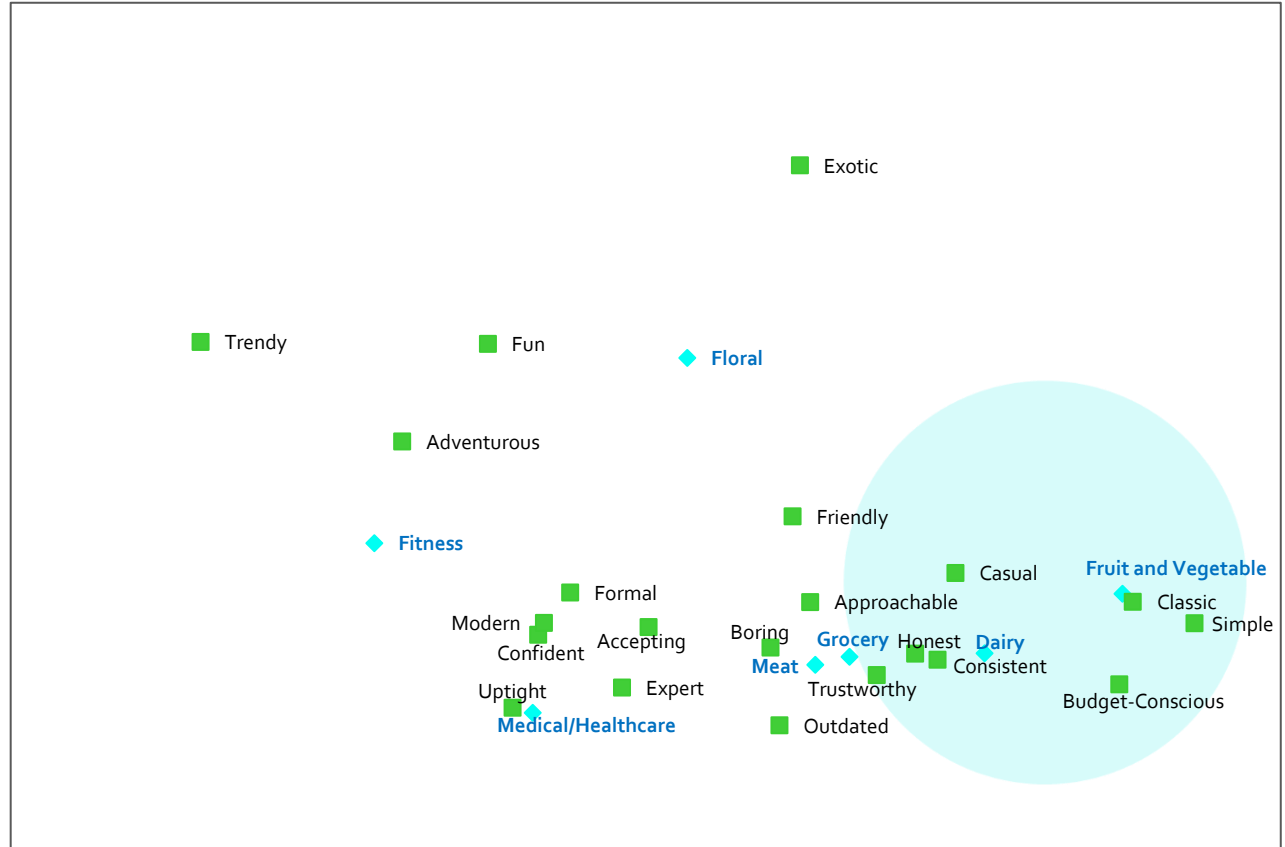
# Industry Personality Correspondence Map

## Correspondence analysis

### What it is:

A mapping technique that allows us to determine which industry attributes are most differentiating for and which attributes would need to be changed to move industry perceptions closer or farther from another industry.

Industries and attributes that are rated similarly are placed close to each other on the map, while those that are rated differently will appear in a different area of the map.



## Floral Industry Findings By Key Segments

		Gender		Generation			
	Total Australia	Male	Female	Gen Z	Millennials	Gen X	Boomers
Total Australia Respondents Evaluating Floral Industry	(504)	(212)	(292)	(57)	(146)	(131)	(170)
	%	%	%	%	%	%	%
				[Z]	[M]	[X]	[B]
<b><u>Overall Impression of Industry</u></b>							
Very Favorable	15	13	17	14	20	15	9
Very/Somewhat Favorable	54	49	59	59	54	58	48
<b><u>Industry Momentum</u></b>							
On its way up /Improving rapidly	10	8	11	11	11	9	8
On its way up /Improving rapidly or somewhat	33	30	35	57	37	22	26
<b><u>Industry Reputation</u></b>							
Very Favorable	15	13	17	14	19	16	11
Very/Somewhat Favorable	59	56	61	65	61	56	57



# Floral Industry Findings By Key Segments

	Total Australia	Gender		Generation			
		Male	Female	Gen Z	Millennials	Gen X	Boomers
Total Australia Respondents Evaluating Floral Industry	(504)	(212)	(292)	(57)	(146)	(131)	(170)
	%	%	%	%	%	%	%
				[Z]	[M]	[X]	[B]
Offers unique products and experiences	68	64	72	69	71	68	65
Is trustworthy	65	64	67	69	67	66	61
Adapts quickly to meet the needs of consumers	64	58	69	60	71	62	59
Is mindful of the environment	62	58	65	65	63	61	59
Is innovative	58	55	60	62	60	59	52
Offers affordable options	57	54	61	61	61	61	47
Creates products or services worth paying extra for	57	50	64	53	68	62	42
Makes room for a wide variety of brands	57	56	58	63	57	60	51
Is transparent in its production/service methods	53	50	56	57	60	50	47
Treats employees fairly	51	50	52	55	61	48	42
Values diversity, equity and inclusion	50	47	53	59	56	46	42
Attracts top talent	42	38	47	49	57	39	25
Uses technology wisely	42	42	42	50	46	40	36
Helps solve some of society's most pressing problems	36	34	38	52	47	28	23
Promotes public health	36	32	40	49	45	33	22
Promotes individual health	36	36	35	45	44	31	25



# Floral Industry Findings By Key Segments

	Total Australia	Gender		Generation				Income	
		Male	Female	Gen Z	Millennials	Gen X	Boomers	Under \$75K	\$75K or More
Total Australia Respondents Evaluating Floral Industry	(504)	(212)	(292)	(57)	(146)	(131)	(170)	(232)	(252)
	%	%	%	%	%	%	%	%	%
				[Z]	[M]	[X]	[B]		
Friendly	42	36	48	39	45	37	47	45	40
Fun	32	21	42	43	38	25	28	32	32
Exotic	28	26	29	25	30	28	26	33	23
Trendy	26	21	31	26	33	23	23	21	30
Approachable	26	23	30	28	23	26	31	29	25
Classic	25	20	30	16	28	26	25	27	23
Modern	23	20	25	29	22	21	22	23	22
Consistent	21	22	20	12	17	26	27	21	23
Trustworthy	21	18	23	23	22	21	18	22	19
Expert	21	20	21	18	19	20	25	20	21
Confident	20	18	22	21	23	13	24	20	21
Simple	19	17	21	26	18	17	17	18	19
Honest	19	20	17	16	22	14	21	17	20
Formal	17	17	16	15	19	17	14	20	15
Adventurous	16	14	18	14	17	16	15	15	17
Accepting	14	14	15	17	20	12	9	11	17
Casual	12	14	10	8	17	7	14	14	11
Budget-Conscious	7	8	7	7	8	6	8	8	7
Outdated	5	6	4	2	6	6	4	5	5
Boring	3	6	1	2	4	4	3	4	3
Uptight	3	3	2	-	5	2	2	2	3



# Shopping Habits

	Total Australia	Gender		Generation				Income	
		Male	Female	Gen Z	Millennials	Gen X	Boomers	Under \$75K	\$75K or More
Total Australia Respondents	(755)	(328)	(427)	(99)	(214)	(187)	(255)	(347)	(379)
	%	%	%	%	%	%	%	%	%
<b>Responsibility for Grocery Purchases</b>									
Primarily responsible	75	66	83	71	78	83	65	75	74
Share responsibility	25	34	17	29	22	17	35	25	26
<b>Frequency of Purchasing Groceries</b>									
Several times per week	40	39	42	33	42	53	30	38	43
Once a week	51	53	49	56	52	41	57	49	51
2 to 3 times per month	8	8	9	11	6	6	12	13	5
Once a month	0.3	0	0	0	0	1	1	0	0
Mean times per month:	5.7	5.6	5.8	5.3	5.8	6.3	5.1	5.5	5.9
<b>Groceries Purchase on a Regular Basis</b>									
Fresh produce (fruits and vegetables)	98	98	97	99	97	97	98	97	98
Dairy milk	91	93	90	92	94	90	88	87	93
Beef and/or poultry	89	89	89	85	90	91	88	86	91
Fresh flowers	11	10	12	17	16	9	4	5	17



# Shopping Habits

		Gender		Generation			
	Total Australia	Male	Female	Gen Z	Millennials	Gen X	Boomers
Total Australia Respondents	(755)	(328)	(427)	(99)	(214)	(187)	(255)
	%	%	%	%	%	%	%
<b>Typical Grocery Purchase Locations *</b>							
Supermarket/Grocery Store	97	98	97	95	97	97	99
Online retailer	19	15	22	28	28	15	5
Convenience Store	15	17	14	28	20	12	5
Farmer's Market/Farm Store	14	14	15	15	17	15	11
Warehouse Club	9	11	8	10	14	9	3
Mass Merchandiser	7	7	7	13	9	6	2
Dollar Store	4	5	4	6	6	3	2
Drug Store	4	3	4	8	4	3	1

\* Respondents had to purchase from a supermarket/grocery store and/or from an online retailer to qualify for this study.



# Demographic Summary

		Gender		Generation			
	Total Australia	Male	Female	Gen Z	Millennials	Gen X	Boomers
	(755)	(328)	(427)	(99)	(214)	(187)	(255)
	%	%	%	%	%	%	%
<b>Gender</b>							
Male	49	100	-	36	45	52	59
Female	51	-	100	64	55	48	41
<b>Generation</b>							
Gen Z (18 - 26)	16	12	20	100	-	-	-
Millennials (27 - 42)	31	28	34	-	100	-	-
Gen X (43 - 58)	27	29	25	-	-	100	-
Boomers (59 - 78)	26	31	21	-	-	-	100
Mean Age:	45.8	48.2	43.5	23.3	35.0	50.1	67.9
<b>Marital Status</b>							
Married	44	49	38	18	43	47	57
Not Married	56	50	61	81	57	53	43
<b>Employment Status</b>							
Employed	66	69	63	74	84	72	33
Not Employed	34	31	37	26	16	27	67



# Demographic Summary

	Total Australia	Gender		Generation			
		Male	Female	Gen Z	Millennials	Gen X	Boomers
Total Australia Respondents	(755)	(328)	(427)	(99)	(214)	(187)	(255)
	%	%	%	%	%	%	%
<b><u>Education</u></b>							
Less than high school	6	4	7	2	3	7	9
High school	47	51	43	49	39	48	55
College	47	45	50	49	58	46	36
Median Annual Household Income:	\$83.6K	\$85.8K	\$81.5K	\$85.1K	\$105.2K	\$85.9K	\$53.9K
<b><u>Territory/State</u></b>							
New South Wales	31	33	30	27	36	26	33
Victoria	29	28	30	30	32	35	20
Queensland	17	19	15	14	14	16	23
Western Australia	9	7	11	12	10	7	9
South Australia	9	10	8	13	3	11	11
Tasmania	3	2	4	3	3	3	4
Australian Capital Territory/Canberra	1	2	1	1	2	1	2
Northern Territory	0.3	0.3	0.3	0	0.4	1	0

