

2017

CONSUMER SURVEY REPORT

FOUR-YEAR TRENDS

just add ice®





just add ice[®]

Just Add Ice[®] started eight years ago with the vision to bring beautiful plants to the market in a way that everyone could attain, maintain and enjoy. With a commitment to this vision, each year we have asked our orchid consumers to complete a brief research survey. For this year's report the surveys from the past four years have been compiled to better align consumer trends with our vision along with the goal to keep the Phalaenopsis orchid the fastest growing potted floral plant in the industry.

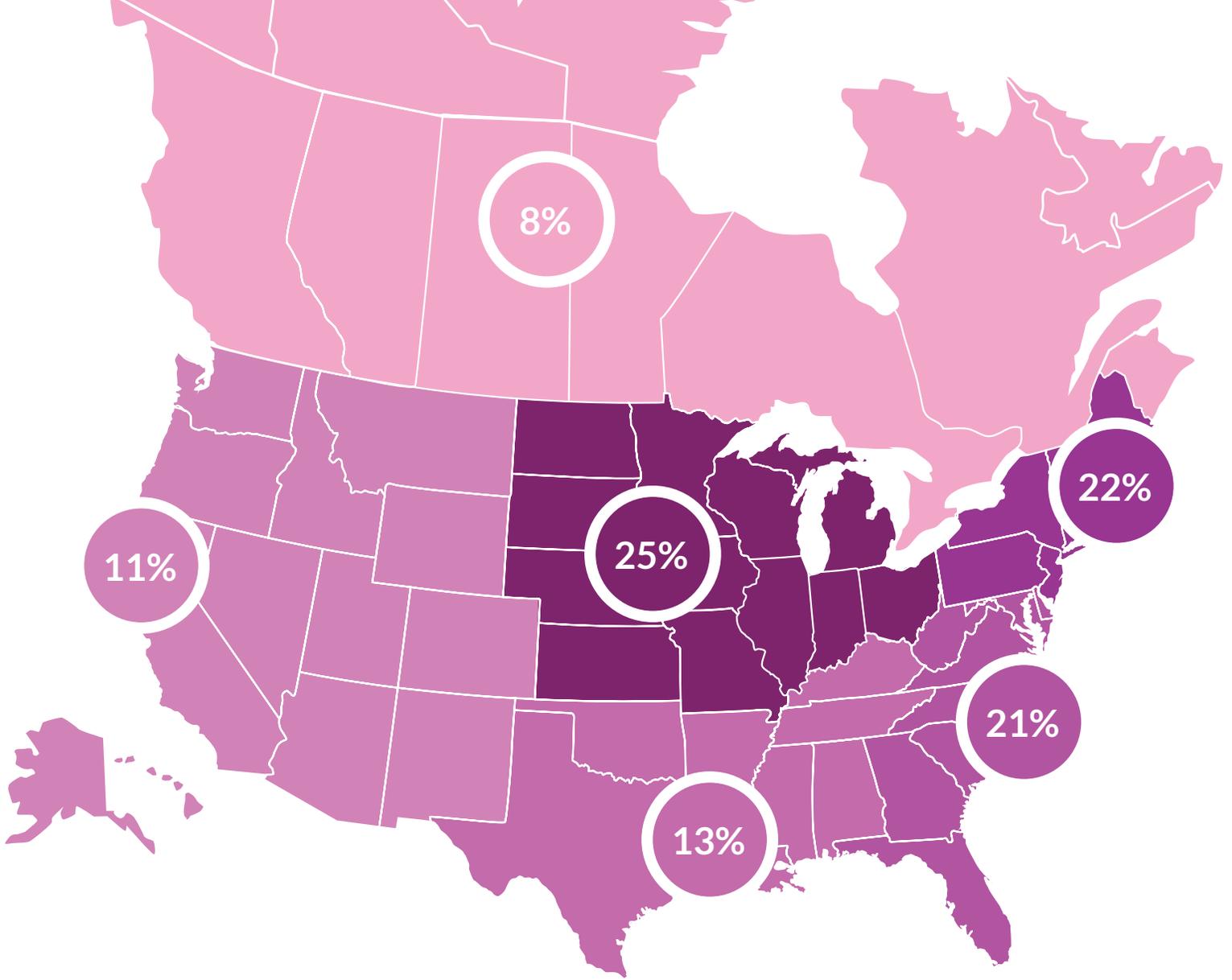
2.2 Million
annual website visitors

Over 1.7 Million
Blog Views

33,000+ weekly blog email subscribers
10,000+ comments

70k+ Followers

on social media who contributed
180,000+ visits to our website



Just Add Ice® Consumer Surveys from 2013 to 2016

Following the end of each calendar year, a research survey is distributed through the Just Add Ice® social media pages. Over the past 4 years, **11,000+ responses** have been compiled from surveys ranging in length from **30 to 60 questions**.



Just Add Ice® orchid consumers closely resemble Floral Buyers as a whole throughout the U.S.

Our research partner **Prince & Prince** has analyzed this survey data and has provided a summary of the findings that also includes a comparison to the 2014 Prince & Prince U.S. Consumer Floral Tracking Survey. This comparison to a random sampling of consumer floral buyers validates these survey responses to the consumer preferences on a national level.

Consumer Profile

Over the past four years, 80% of Just Add Ice® orchid consumers continue to fall within the following demographics. In this consumer survey, Just Add Ice® went a step further to discover more about the customer, including pet ownership and brand identity.



Gender

Female



Age

36+ Years Old



Education

High School to
Bachelor's Degree



Household

Owns home with 1-3
people in the household



Income

Income spread evenly
from low to high

“

*All the content on file
has been simple to read
and very informative.
This has made the care
giving process much
simpler! I'm so happy I
did this, thank you!”*

— Paige Etheridge





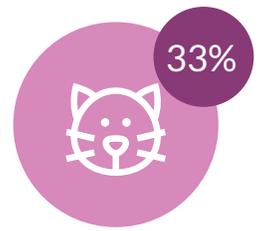
Percentage of Survey Respondents with Pets



Pet Owners



Dog Owners



Cat Owners

Top 5 Brands

RESPONDENTS' FAVORITE

Out of the 59 brands listed, the top 5 brands that respondents admire or identify with were the following:

amazon.com

Walmart

TARGET

Bath&BodyWorks

NETFLIX

Floral Budget

HIGHEST YEARLY BUDGET

Consumers with the highest yearly floral budget admired these brands:

Pottery Barn

Whole Foods

Chanel

ProFlowers

The North Face

Martha Stewart

Prada

Coach

Sephora

Gardener's Supply Company

Just Add Ice® Orchids

MOST OWNED

Consumers with the most Just Add Ice® orchids associated with these brands:

Gardener's Supply Company

Whole Foods

Chanel

Costco

Coach

Wild Birds Unlimited

Pottery Barn

Prada

Vera Wang

Califia Farms

Orchid Self-Purchasing

Highly satisfied customers and a growing repurchasing rate has established a Just Add Ice® orchid brand following.

Over Half

Just over half of respondents own a Just Add Ice® orchid because they purchased it for themselves

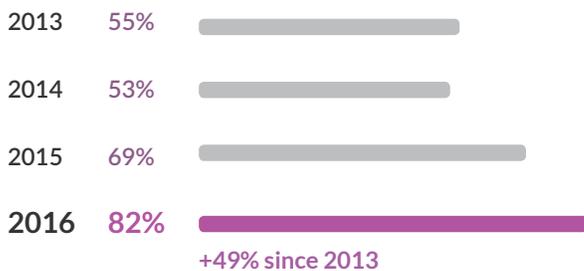
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Average number of orchids that respondents have purchased or received in the last 12 months

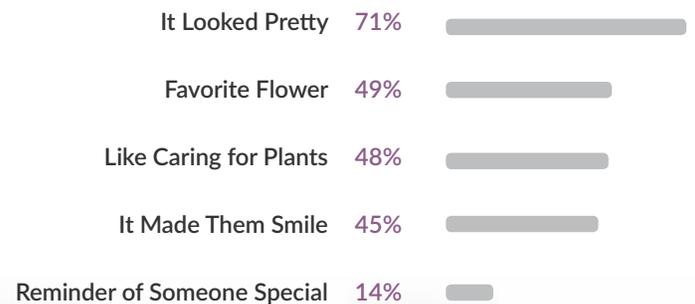
90%

Percentage of satisfied Just Add Ice® orchid customers reported year-over-year

Customers Who Own More Than One (1) Orchid



Top Reasons for Purchasing an Orchid for Myself



“

I was always afraid of orchids, thinking they were too hard to care for. I was wrong. Treat yourself, it will add beauty to your home and make you smile every time you look at them.”

— Debra Sprague

Orchid Gift-Giving

With a high success and satisfaction rate, we've tracked the increased likelihood to purchase an orchid as a gift.

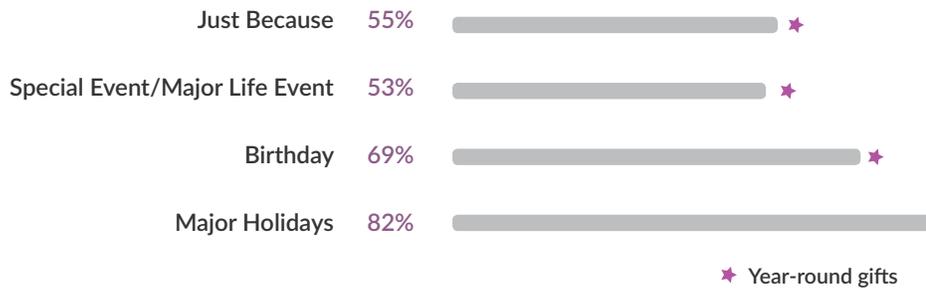
1 in 3

People received a Just Add Ice® orchid as a gift

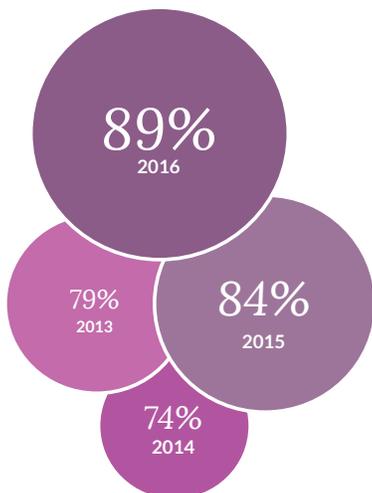
10%

The orchid gift-givers represent 10% of the respondents

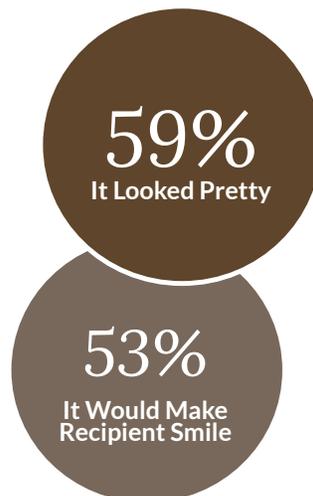
Occasions for Which an Orchid Was Given as a Gift



Percentage of Likelihood that Orchids Will Be Purchased as Gifts in the Future



Reasons Why an Orchid Was Selected as a Gift



When gifted, where do the recipients mainly place their orchid?



29%

Living/Family Room

Within these rooms, the orchid was placed mainly on an end table, coffee table or shelf



28%

Kitchen

Within the kitchen, the orchid was typically located on the windowsill



10%

Dining Room

Within the dining room, the orchid could be found on the dining room table

Purchasing Motivators

These factors continue to be the most important factors in orchid purchasing.



Quality

BETTER THAN A BOUQUET

75% of consumers said that the messaging “Lasts Longer Than a Bouquet” would motivate them to buy



Lifecycle of one 5" orchid in bloom

=



Lifecycle of vase life of 12 bouquets of flowers



Care

PET FRIENDLY

The ASPCA classifies Phalaenopsis orchids as non-toxic to dogs and cats



Reblooming

MOST POPULAR CARE TOPIC

Reblooming articles on Just Add Ice® website received 23k+ visits



Price

AVERAGE PRICE = \$16

95% of survey respondents reported that the purchase price was fair. The average price has been over \$16 within the last 12 months

8 to 10 5" orchids can be purchased for the average price of 12 bouquets



Ten 5" orchid plants

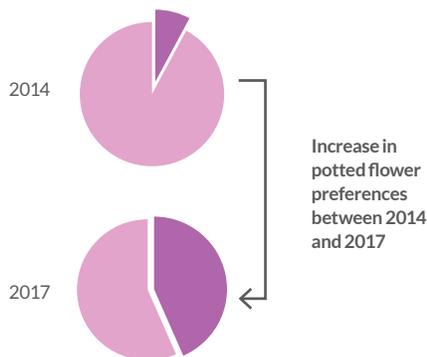
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12 bouquets of flowers

In 2014, the national average of floral buyers who only preferred potted flowers was only 10%

- Prefer Potted Flowers
- Prefer Cut Flowers



In the last 12 months, 39% of survey respondents said they did not purchase cut flowers



Flower Color

ORCHID COLOR PREFERENCES

Over 90% of consumers continue to rate flower color as an important decision-making factor. Displays with variety of colors will ensure everyone can find a color they prefer



59%



52%



41%

These 4 colors have doubled in popularity over the past 4 years



33%



30%



24%



14%



MOST OWNED COLOR

Purple is the most owned bloom color for the last four years



PINK



WHITE

First-time purchasers prefer pink and men prefer white



UNIQUE COLORS

Customers who own more than two orchids seek out more unique orchid flower patterns and colors

Preferred Pot Colors

Of the houseplants you own, what is the color palette of pots they are in?



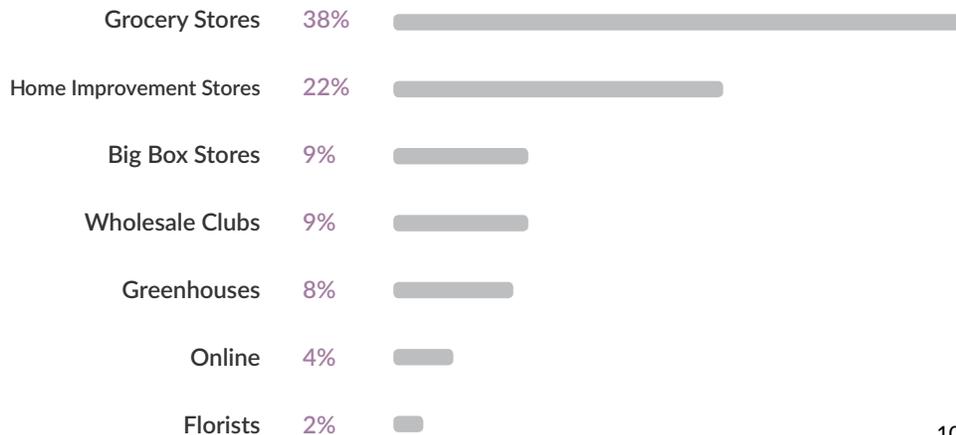
Top Preferred Pot Material

When asked what pot material do you most prefer your houseplants to be in?



Purchasing Locations

This continues to be the same trend over the past four years.



Beyond Orchids

Just Add Ice[®] orchid consumers love orchids along with all things green. Houseplants have risen to the Pinterest Top 100 in the last two years.

“

Satisfying our growing desire to rejuvenate and revitalize, Greenery symbolizes the reconnection we seek with nature, one another and a larger purpose.”

— Leatrice Eiseman, Executive Director of the Pantone Color Institute



Top 100

Foliage and Greenery made the Pinterest Top 100 Trends the last two years

150 million

There are 150 million active Pinterest users

87%

87% of active pinners said they've purchased something because of Pinterest



Money Tree



Bonsai



Anthurium



Bromeliad

Nearly Half

46% of consumers in the U.S. plan to purchase houseplants in the next 6 months. This is an increase from 2009 at 37% by the Gen Y & X¹



1 in 3

34% of Just Add Ice® customers have purchased **succulents** in the last 12 months



60%

Nearly 60% of Just Add Ice® customers stated that they purchased **foliage and other houseplants** in the last 12 months

← 1 in 3

Just Add Ice® orchid consumers were interested in purchasing these additional houseplants

¹ SAF & AFE

Looking Ahead

By Garden Media Group

Wellness is no longer just about being healthy. It goes deeper, embracing positivity, relaxation and self-care. A happy mind leads to a happy body. Take advantage of Nature's Rx by:



Being surrounded by air purifying plants



Finding a quiet place in nature to meditate



Eating a plant-based diet

Trends

Create Your Own Breathing Room

The stress of being connected 24/7 is resulting in a need to “turn off” the noise and enjoy the quiet.

Awareness of the harmful effects of indoor pollution continues to rise, with 52% of people in the U.S. using houseplants to clean the air and the invention of “pause architecture” to create a small oasis for connecting with nature in this fast-paced society.



Clean the Air

Display plants that clean the air and clear the mind, such as palms, ferns, orchids or philodendrons and other leafy plants



Use Hanging Gardens

Hanging gardens and flower pot pendants can be used to create a green canopy

Back to Basics

The fast-paced, tech-heavy, informationally saturated and highly demanding world today has left many people wanting for less. More designs and products are striving to emphasize the essentials and importance of quality over quantity. Consumers are buying more functional products with fewer features, lower cost and lower environmental impact. This reflects a global shift toward reduced consumption coupled with finding bliss in what you do, not in what you have.

How to Get Back to Basics



Find easy-care, quality plants that require little maintenance



Out with the old, in with the new. Purge plants that are past their prime, have outgrown their space or are not thriving



