

2023 Report

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# 6 GROWTH AREAS IN THE FUTURE OF FLORAL

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## Big changes that will reshape our world are not unseen.

Experience shows us the changes that are going to reshape our industry are not unseen events, but instead they are things that we can see signals of today if we know where and how to look. But the trouble is that we are so heads down taking care of today that we don't have our radar up to catch the important signs and signals and start to make sense of them. And part of this is understandable, because we don't ever get taught to think about the future in a structured way.

## IFPA worked with Kantar to identify opportunities for growth.

- First to identify critical macro, consumer and category shifts will influence the floral industry in the coming years
- And importantly to use what we learned to define a set of clear opportunity areas that the industry can go after to drive growth

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## Strategic foresight

Strategic foresight is not about *predicting* the future, but rather to try to amplify some of the signals we are seeing, look for data to back these signals up – and use all of that to identify opportunity spaces that the industry can develop and nurture.

***"The best way to predict your future is to create it."***

***— Peter Drucker***

## 6 GROWTH AREAS IN THE FUTURE OF FLORAL

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# Blossoming Everywhere

**Tapping into new channels and partnerships to drive discovery, impulse, and new purchase occasions, ensuring flowers are always within reach for shoppers.**

This opportunity is based on a consumer truth that we see not just in floral but much more broadly. And that is that more than ever, consumers expect retailers and brands to meet them wherever they are, whenever they want, and deliver a frictionless experience. This is becoming easier to do as commerce is woven directly into more aspects of everyday life—commerce can happen within social media channels and media experiences, in our cars, using voice commerce on Alexa, and in many other ways.

And so the opportunity here is to tap new channels, delivery and business models, and partnerships and make sure that flowers are always within reach of the shopper. By doing so, the industry can drive new impulse occasions, and reach people within their existing routines whether that is online or in real life.

## What's Driving This

DECENTRALIZED RETAIL

PERVASIVE DIGITAL LIFESTYLES

BLURRING OF DAILY ROUTINES

EXPANSION OF UNATTENDED RETAIL

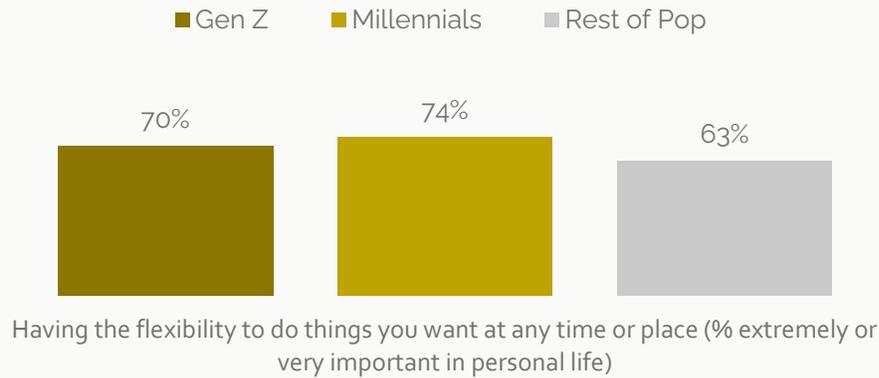
HEIGHTENED EXPECTATIONS FOR CONVENIENCE

ANTICIPATORY INTERACTIONS

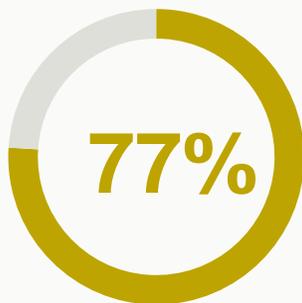


This demand for convenience comes through clearly in Kantar’s US MONITOR data – and it’s felt most strongly by younger people.

74% of Millennials and 70% of Gen Z agree that “Having the flexibility to do thing you want at any time or place,” is extremely or very important in their lives – and a lot of that is that they’ve been trained to expect this by their digital interactions with brands they know and love – and are projecting those expectations on their other brand experiences



And as one of our experts put it – we can take inspiration from the beauty industry which has created a sense of community among its consumers – and as she put it “shift the focus to accessibility” as a way to reach a broader range of consumers.



of purchases are made with a reason or occasion in mind, while only 23% of people say they bought flowers “just because.”

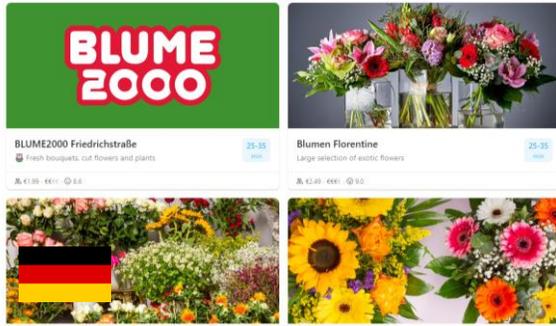
We should take inspiration from the beauty industry as it has successfully created a sense of community among consumers and brands. By finding new ways to create emotional connections, engaging consumers through new channels and formats, and shifting the focus to accessibility, brands can reach a boarder range of consumers.

– **Roseanna Roberts**

*Creative Strategist and Trend Forecasting Consultant,  
Roseanna Roberts Consulting*

## Kantar's Streetscape missions gave us inspiration

### Flowers - Berlin



Wolt, which is a delivery platform that operates in 20 countries across Europe and is focused on making e-commerce really local. Our German Streetscaper talked about how in Berlin Wolt features lots of flowers from its floral merchants right alongside bakery, snacks, and other gift options to encourage impulse purchases while on the platform. And the flower deliveries are made in as little as 30 minutes.

### Wolt Floral Delivery

Encourage impulse purchases and delivering flowers in 30 minutes.



We also got a couple great examples of what Blossoming Everywhere could look like from our Streetscaper in Tokyo – like flower vending machines that let people buy single flowers or small bouquets while commuting and on-the-go.

### On-the-Go Floral Vending

On-the-go access to single flowers or small bouquets in Tokyo.



Uniqlo, the Japanese clothing chain, offering fresh cut flowers both in-store and through their online site – making sure that flowers are always within reach for consumers in the places and with the brands they already know and love.

### Uniqlo Flower

A new Uniqlo outfit... and fresh cut flowers all within reach both in-store and online.

## Seize the opportunity

Let's talk about how the industry could seize some of these opportunities...

**We can bring floral to new channels and new settings**—whether its with clothing brands like Uniqlo – or some of the important third spaces where people spend time like coffee shops to really meet people where they are and add the beauty of flowers to people's daily routines.

**It will be important for the industry to start marketing and selling to the next set of influencers** – the Siri's, the Alexas and the other digital intermediaries as more commerce happens outside of stores and checkout lines. Think about this – connected cars mean in-car commerce and some expect that in the next few years we're going to see tens of billions of dollars of transactions happening through our cars.

**And finally, let's think about new ways to create impulse moments** – not just wait for them to happen – through things like popups, new vending options, or even roving autonomous flower stands. In China, driverless mini-vehicles rove around corporate and school campuses selling people food – think of them like mini convenience stores – and these same kinds vehicles could be adapted to give people new ways to buy flowers in certain venues and settings.



### Tap New Channels and Partners

Expand beyond traditional channels and partner with outlets such as gyms, convenience stores, clothing boutiques or coffee shops in order to meet consumers where they are and add moments of surprise and delight to daily routines.

### Sell to Siri and Alexa

As more commerce happens outside of physical stores and checkout lines, explore how to drive sales through voice commerce, in-car commerce, and digital environments.

### Decentralize Retail

Use pop-ups, vending machines, or even roving autonomous flower delivery drones to reach a broader range of consumers and make flowers more accessible.



# Flower Power

**With a growing focus on mental wellbeing, there is an opportunity to leverage flower’s proven ability to boost mood, reduce stress, and offer an escape from day-to-day realities by engaging the senses.**

It’s all about the opportunity to double down on the proven ability of flowers, plants, and more generally access to nature -- to reduce stress. We know from the stakeholder interviews that some of the lift the floral industry saw in recent years, was based on people doing this - bringing flowers into their home and their lives to reduce stress. And despite being in a better place with COVID than in the past, we see a strong and enduring opportunity to bring flowers into high-stress environments --- and to position them as a natural way to combat anxiety, boost mood and mental function, and help people feel and perform their best.

## What’s Driving This



PROACTIVE APPROACHES TO HEALTH

ATTENTION TO SELF-CARE

DESIRE FOR MOOD & ENERGY MANAGEMENT

GEN Z ATTENTION TO MENTAL WELLBEING

WELLNESS AS STATUS & LIFESTYLE

FALLING MENTAL HEALTH STIGMA

LONELINESS EPIDEMIC

DESIRE FOR ATTAINABLE LUXURY

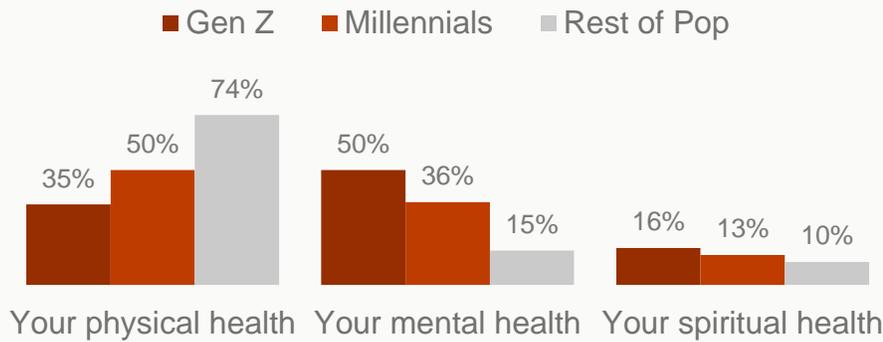
RISE IN SOCIAL PRESCRIBING

50% of Gen Z tell us that their mental health is the aspect of their wellbeing that they're most concerned about.

Just 36% of Millennials and 15% of the rest of the population would agree.

And I'm not trying to say that flowers are going to be the silver bullet to address this – but I would note that we're learning more and more about the scientific basis for how access to nature and flowers can play a positive role.

### Aspect of own wellbeing most concerned about



**75%**  
of respondents said they felt a reduction in stress levels after putting flowers in their workspace

People are looking to maintain self-care and wellness to manage unease about the future. Rising incidences of depression and anxiety are leading people to look for new solutions. Floral has a great deal of potential for growth within nature-based interventions. Working with nature or just exposure to nature offers great stress reduction, and even affects immune response and disease interventions through neuro-hormonal regulation.

– **Matthew Wichrowski**

*Editor-in-Chief of American Horticultural Therapy Society's Journal of Therapeutic Horticulture*

## Kantar's Streetscape missions gave us inspiration



### LEGO Bouquets

The LEGO Botanical Collection combines the notion of play with the beauty of "flowers."

**Lego** continues to target the "kidult" consumer group, those looking to escape their work and routines through play. The LEGO Botanical Collection for adults offers the option to customize bouquets. Adjustable stems make it easy to tailor arrangements for any vase.



### #ReinventingVandalism

Sofia Rivera, owner of floral shop Dos Sofias, created floral installations across Mexico City in the depths of COVID.

A floral shop called **Dos Sofias**, launched an initiative to create floral installations across Mexico City. With COVID-19 restrictions greatly affecting floral sales, Sofia purchased flowers from producers to spread happiness and share hope amid uncertainty.



### Mixed Reality Experience

Abbott created a garden-themed, mixed reality experience to calm people when they donate blood. Users plant seeds that grow into colorful trees and flowers.

**Abbott** has unveiled a mixed reality experience for use during blood donation, designed based on research that natural settings are the most preferred environment as donors give blood. Participants visit a whimsical garden while listening to soothing music, planting seeds that grow into colorful trees and flowers.

## Seize the opportunity

Partnerships are a great starting point. Play off people's openness to self-care and new kinds of wellness activities centered around flowers. Partner with organizations like the **American Horticultural Therapy Association** to educate consumers on the physical, cognitive, and emotional benefits of interacting with flowers.

**Target the workplace.** 75% of people in a recent study said they felt a reduction in stress after flowers were put in their workplace. Employers want calm productive workers, so in the same way that yoga and mindfulness lunch hours – or ergonomic chairs and keyboards -- are provided as a part of the employee experience.... why not flowers as well. Find a forward-looking company and pilot this.

**Finally, why not partner with a meditation app like Calm or Headspace** to build a mindfulness practice centered around flowers --- it could be focused on the care of cut flowers or plants, on paying close attention to the color, shape, scent and other details of the flowers to ground oneself in nature.

Many of these apps work on a subscription basis – so maybe this is the backdoor way to get people to do monthly flower subscriptions as part of their monthly mindfulness app subscription



### Champion Horticultural Therapy

Partner with organizations like the American Horticultural Therapy Association to educate consumers on the physical, cognitive, and emotional benefits of interacting with flowers, encouraging gardening groups and other floral-related social interaction as a form of complementary therapy.

### Make Flowers an Employee Benefit

Position access to flowers and other greenery as a workplace benefit that helps employers increase worker productivity while improving employee wellbeing and satisfaction.

### Keep Calm and Carry On

Partner with a meditation app to offer a daily mindfulness practice centered on the observation and care of cut flowers or plants, paying close attention to color, shape, scent and other aesthetic details to ground oneself in nature and quiet a busy mind.



# Experience Ambassadors

Elevating the role of the employee to serve as ambassadors and creatives, helping shoppers better understand the value of floral and the expanded role it can play in their lives.

This growth area is about helping shoppers better see the value of floral and the expanded role that flowers can play in their lives – and doing this by reimagining the role of the floral department employee... We can elevate them to serve as an ambassador...as a teacher...an experience designer – not as a traditional store clerk – which will give them the opportunity to share their knowledge and passion with consumers – and make the floral department the destination it deserves to be.

## What's Driving This



EXPERIENTIAL RETAIL

DESIRE FOR MEANINGFUL WORK

FOCUS ON LOCAL

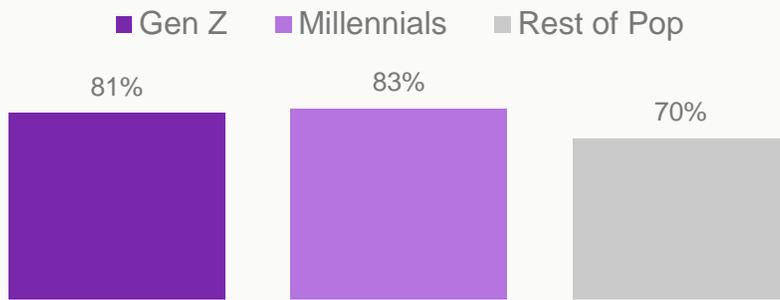
RISE OF INFLUENCERS AND TRIBES

RISE OF SERVICE-ORIENTED RETAIL

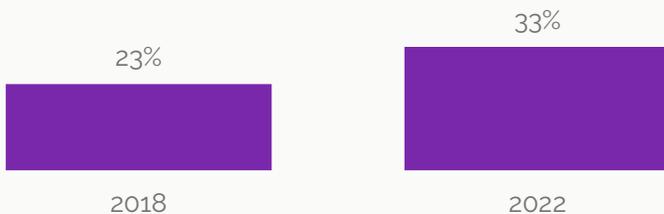
SEEKING ANALOG

And at the point of shopping in store... let's not fall into the trap of thinking that younger consumers ONLY want digital experiences. Kantar's MONITOR data shows that Gen Z and Millennials report enjoying the experience of shopping in stores to a greater degree than their older peers. But we need to make it relevant for them – and we need to focus on service. Again, pointing to our MONITOR data, recent years have not been kind to the idea of customer service. Fully a third of people agree that they rarely receive good customer service – up from 23% just five years ago.

## I enjoy the experience of shopping in stores (% total agree)



## I rarely receive good customer service (among 18+) (% agree)



Our company values are made evident in the way we talk to consumers, our brands partnerships, and the foundations or charities we support. We are an employee first company, and work to evoke the beauty of top designers in the flower industry regardless of where you are in the country. Consumers can confidently send in their orders with a few clicks and our florists will do a great job of accurately bringing it to life.

– Seth Goldman  
CEO, UrbanStems

## Kantar's Streetscape missions gave us inspiration



### Made with Joy Campaign

The "Soul of Fleurop" campaign highlighted the passion and artistry of 20 of its partners across Germany.

In Germany, the "Soul of Fleurop" campaign highlighted the 20 of this firms partners across Germany – their passion for their profession – and their artistry. The campaign shows florists with their creations – and how their profession brings them joy in their own words.



### Floral Arranging School

Hana-Kichi is the educational wing of the Aoyama Flower Market and lets florists become educators.

From Japan we heard about Hana-Kichi, which is a flower school associated with a flower market. It let's people learn from experts – and let's employees of the market become teachers and share their knowledge and reimagining their role as a florists into a one of an educator.



### Educational Urban Farm

Librero Verde is an urban farm that serves as an interactive store, consultancy, and plant hospital.

Kantar's Mexico streetscaper told us about Librero Verde a store, consultancy, and plant hospital in Mexico City. Customers can come in to find plants that fit their home environments, learn about routine care and propagation, and can even drop off plants than need professional care to have them brought back to life.

## Seize the opportunity

Let's lean into this idea of experiential retail and make floral a centerpiece of the customer experience at retail. This could be as simple as doing an in-store floral popup in the wine section or bakery – or could be as innovative and bold as designing a concept store with floral as its center. At one of my local retailers – the floral department is upstairs, tucked off with the medicine, magazines, and pet food. The idea of the Experience Ambassadors would flip this on its head and make floral a true destination in the store.

Another part of this is positioning the employee as an expert. Hire for personality and passion. Let them show off their creativity, have them share the story behind different flowers, their meaning and symbolism – and as in the example from Japan – have them teach people how to appreciate and engage with flowers and plants.

And finally, give them the license to innovate beyond the traditional holidays and occasions – and connect flowers to other cultural moments or media franchises. For example, we saw that Urban Stems offers a series of bouquets inspired by the Netflix series *Bridgerton* – such as one with yellow blooms symbolizing the enduring friendship Penelope and Eloise share on the show. This is how you connect with people on their terms and in ways that resonate with them.



### Make Floral the Centerpiece

Raise the profile of the floral department by making it more visible within the store, driving incremental visits by enabling shoppers to see the skills of the florist at work.

### Position the Employee as Expert

Elevate the craftsmanship of the floral department by empowering associates to show off their own creativity and skills, offering tutorials in store and on social platforms, and telling the story behind the flowers, how they were cultivated, and their symbolism in different cultures.

### Tap into Culture

Floral associates can help integrate flowers into everyday life, helping shoppers pair flower choices with their menu or wine selection for an evening at home and developing contemporary LTOs and seasonal offerings that tie into pop culture moments beyond the traditional holidays and occasions.



# Augmented Arrangements

Leveraging augmented reality and other digital tools to equip consumers with greater knowledge and insight at every stage of their purchasing journey – from education and discovery to real-time guidance on post-purchase care.

This growth area is a bit more forward looking and will take more time to come to fruition – but we see signals that suggest that augmented reality and other digital tools are becoming increasingly integrated within retail and home design – and so there is going to be a growing opportunity to leverage them within the floral category as well. These tools can give people knowledge and guidance at every stage in the customer journey, from education and discovery to post-purchase care. For example, augmented reality tools could help consumers design their own beautiful flower arrangements, offering real-time guidance into how to select the right flowers, display them and maintain their health and beauty.

## What's Driving This



BLURRING DIGITAL & PHYSICAL WORLDS

XR STORES AND SHOPPING

PERVASIVE DIGITAL LIVES

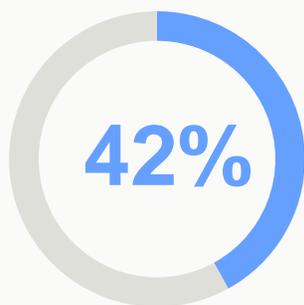
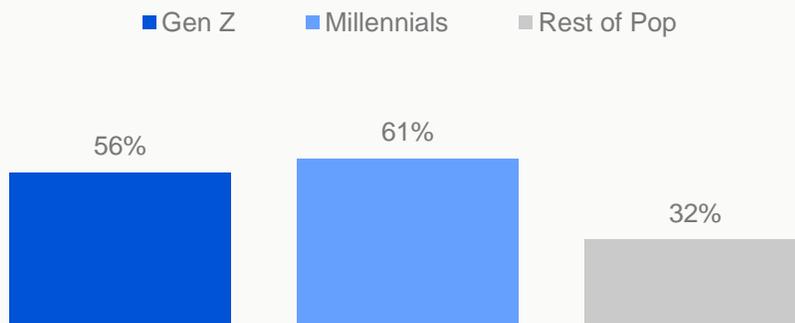
CONSUMERIZATION OF MIXED REALITY AND METAVERSE SOLUTIONS

ADVANCES IN AI

ALGORITHM-DIRECTED LIVES

And Kantar data shows us that young people – Gen Z and Millennials – find it important that their products and services are able to anticipate their needs. When you think about Gen Z specifically, they are native users of augmented reality and digital tools in a way that even Millennials aren't.

## Having products and services that anticipate your need (extremely, very important in personal life)



**of Gen Z and Millennial US consumers are very or somewhat involved in virtual reality tools, games, or apps**

Some interesting tools and innovations are already making their way into the floral space. From sensors in packaging to offer insight into exact temperatures and geolocations, to machine vision utilized for pest control to minimize the spread of pests, to industry-specific forecasting tools to detect supply chain risk. The floral industry is adopting tech and data to their advantage in new and unique ways.

**– Lisa Morales-Hellebo**

*CEO and Co-Founder, REFASHIOND*

## Kantar's Streetscape missions gave us inspiration



In Japan, virtual reality cherry blossom tours – let people enjoy the flowering trees even when it's not spring became popular during COVID in Japan.

### VR Cherry Blossoms Hanami

This VR cherry blossom tour lets people take in the beauty of the cherry blossoms even beyond spring season.



Many plant apps use AI to identify plants and diagnose common problems. This even let's people connect with a botanist to receive personalized advice on how to better care for their plant.

### Plant Diagnostics Tools

This is an app that identifies plants and flowers using AI, and helps diagnose common problems.



From outside the category – there's the example from Kantar's Mexico City streetscaper which is a new digital avatar assistant from Samsung. SAM can be found in both digital and physical stores – and Samsung has created her to raise brand awareness among younger consumers and provide answers about Samsung products and services.

### Digital Avatar Assistant

Samsung's digital avatar, SAM, that can be found in the brand's digital and physical stores and helps customers learn about Samsung devices and

### Seize the opportunity

Let's take a page from furniture stores like IKEA and from the world of fashion – and give people ways to visualize how different arrangements might look in their homes to help them discover and select flowers and plants.

Let's amplify the impact of every flower that is purchased, by giving people the ability to create a virtual copy of what they buy – and sharing it with a friend or loved one – extending the life of the flower in the digital world.

And let's help people get the most out of their purchases – which is increasingly important in a period of inflation and possible recession – and give them tailored care advice and care instructions. This could be done by taking advantage of the power of smartphones and apps – as well as potentially connection to the emerging smart home technologies and the companies like Samsung and others who are pioneering that space.



#### Virtual Try On

Use augmented reality tools to enhance the ecommerce experience and help shoppers visualize how arrangements would look in their space so they can select the best one for their needs.

#### Digital Bouquets

With each purchase of a flower arrangement, offer shoppers the ability to create a virtual copy that they can also send to a friend, extending the life of the bouquet within the metaverse.

#### Post-Purchase Care

Ensure shoppers get the most out of their purchase by offering tailored advice and care instructions, such as how often to change the water, the ideal room temperature, or which pieces to remove first.

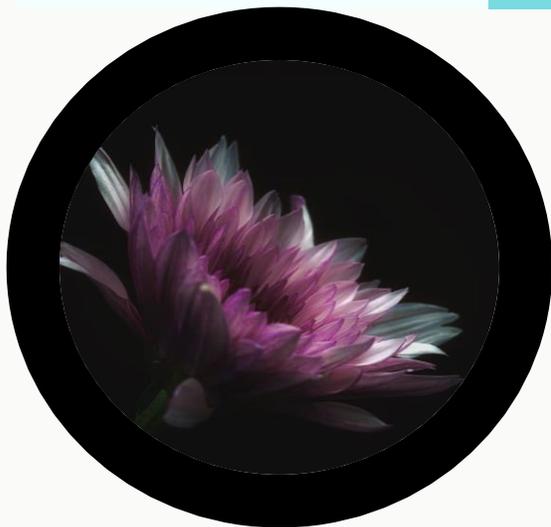


# Flowers for all

**Reaching out to untapped consumers groups, bringing the beauty of floral to a more diverse set of customers by making flowers more accessible and inclusive to all.**

Flowers for All is an other key growth area we identified, which addresses something we heard about in the stakeholder interviews – which is the notions that for many people in the US, flowers are not as big a part of culture and everyday routines as we would might like. They are a special occasion-driven purchase, primarily given as gifts—most often to women—at holidays and other occasions. But there is an opportunity to change how flowers are viewed in American culture, reach out to untapped consumer groups, and bring the beauty of flowers to a more diverse set of consumers. And by doing so, flowers can play a strong role in the lives of more people and provide steady, year-round growth to the industry.

## What's Driving This



CHANGING EXPECTATIONS ON GENDER & IDENTITY

INCREASINGLY DIVERSE RELATIONSHIP MODELS

GROWTH OF GENDERLESS FASHION & BEAUTY

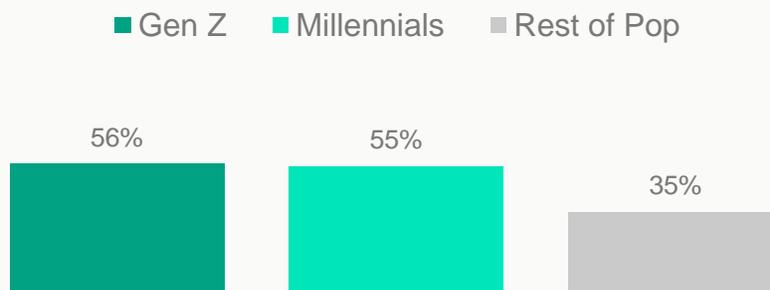
DESIRE FOR HUMAN CONNECTION

LONELINESS EPIDEMIC

EMPATHY AS STATUS

Back to this idea of gender and identity, I don't think it can be understated how much more comfortable young people are expressing themselves and being their authentic selves. Kantar's US MONITOR data bears with out with about 56% of Gen Z and Millennials saying it's extremely or very important to them to challenge traditional stereotypes for their age and gender. They are comfortable being who they are – and that should be seen as good news to an industry that traditionally has not been able to appeal equally to men and women. There's also a thread to tie back to the wellbeing trends and the Flower Power growth area here. We interviewed a Dr. Semir Zeki – who is a brain scientist in London who studies neuroaesthetics. He really talked about the deep human need for people to have beauty in their live and the role that flowers can play in that....just like beautiful music and art can nourish us – he talked about how flowers should be made accessible as part of keeping people healthy and happy.

## Challenging traditional stereotypes for your age or gender (% extremely or very important in personal life)



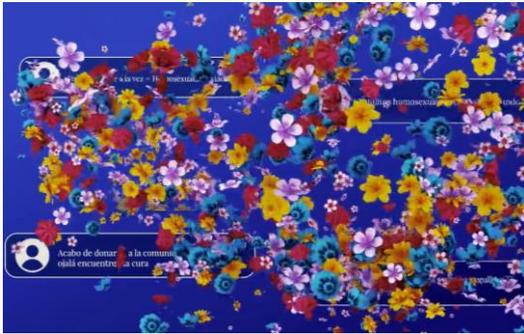
**of male respondents would feel appreciated if they were given flowers, while 45% said they would feel loved**

People often have the view that only those who are wealthy can pursue beauty. The trouble with that attitude is that if you deprive people of the sustenance of the pleasure principle, you cause significant harm. People need exposure to things that provide a “feel good factor.” Offering experiences, spaces, and policies that emphasize the importance of beauty in our lives provide the stimulation we all need and desire.

**– Semir Zeki**

*Professor of Neuroaesthetics at University College of London*

## Kantar’s Streetscape missions gave us inspiration



### Anti-Discrimination Initiative

BLANC, a Mexican flower shop, launched the initiative ¡Échale Flores! in support of the LGBTQIA+ community.

In Mexico a flower show call BLANC ran an activation where they used AI to collect over 34K offensive Tweets directed at the LGBTQIA+ community and then transformed them into blooming digital flowers on their website to spread love and show support for the community.



### Innovative Partnerships

Nikka Whisky partnered Bloomsybox on a whisky and bouquet gift combination.

There is a tie-up between Nikka Whiskey and the flower delivery service Bloomsybox – which paired whiskey and custom bouquet.



### Color-Blindness Glasses

Special glasses make the beauty of art and gardens accessible people who are colorblind

This is an example of helping to bring beauty to an underserved, forgotten group is the colorblind glasses. There are now about 100 international museums, gardens and parks, and other attractions that now offer vision-enhancing, color-blindness glasses. When someone that’s colorblind wears the glasses, they saturate colors that the person otherwise couldn’t see – giving them a chance to experience the beauty of art and flowers in a way they never have before.

## Seize the opportunity

Lean into the changes attitudes around gender – for example, create a campaign with a male Generation Z spokesperson to boldly challenge the stereotype that flowers are mainly something for women.

Tap into the cultural pride and curiosity of an increasingly diverse country we live in and educate them on the historic meaning and symbolism that is tied to different flowers and plants. Again, looking at our MONITOR data about 70% of both Gen Z and Millennials agree with the statement “I wish I had more ways to show the world how proud I am of my culture and heritage” – compared to 57% of Xers and only 42% of boomers. Let’s give people ways to express that pride through flowers.

And lastly, let’s make beauty accessible to all. How could you work with foundations or community groups to bring the beauty and magic of flowers into unlikely settings – public libraries, correctional facilities, schools, sterile healthcare settings and more



### Break the Barrier

Develop a marketing campaign with a male Generation Z spokesperson to broaden the appeal across the gender spectrum and generations and challenge the stereotype that flowers are only for women.

### Tap into Cultural Curiosity

Tell the story behind flowers, educating people on the symbolic and historic meanings of flowers to help them tie flowers to their heritage and cultural identities.

### Make Beauty Accessible

Make it easier for underserved or marginalized communities to experience the beauty of flowers, whether through partnerships with foundations or community groups to fund floral in settings like public libraries and correctional facilities or through initiatives that provide colorblind glasses at retail to build awareness of the industry’s commitment to visual beauty.

# Sustainable Stems

As more consumers look to make informed purchases based on social and environmental impact, brands and retailers can leverage engaging storytelling to offer greater transparency while building industry-wide climate resilience.

Kantar performed a lot of work on the topic of sustainability – including how Gen Z is reinterpreting and redefining what sustainability even means – and this is clearly a critical piece for the future. It’s one that through stakeholder interviews we heard that the industry is addressing – and that’s great and there is always room to do more. Gen Z views sustainability as an existential issue – and also one that goes well beyond just the environment and climate to include things like labor and equity – and one that is focused on brands having a positive impact on the world through things like regenerative agriculture and the circular economy. So there’s an opportunity here to tell a bigger, broader story to tell here about what sustainability is that younger people will be looking for.

## What’s Driving This



VALUES-BASED CONSUMERISM

RISE OF ETHICAL PRODUCTS & BRANDS

CIRCULAR ECONOMY

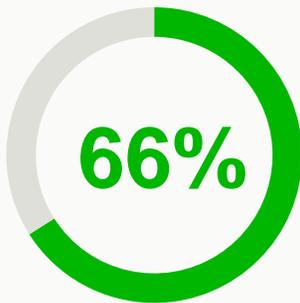
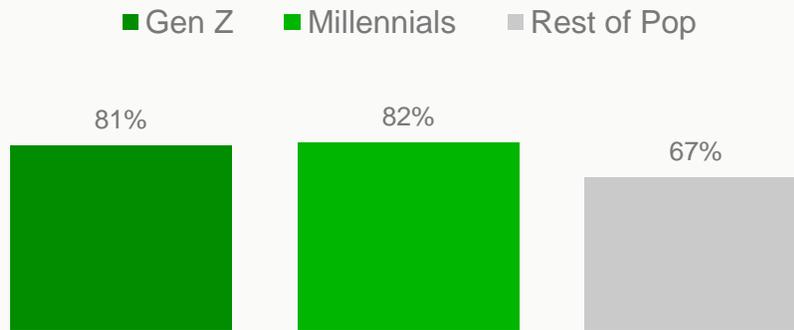
CLIMATE-CONSCIOUS LIFESTYLES

DEMANDS FOR TRANSPARENCY & ACCOUNTABILITY

GEN Z ATTENTION TO SUSTAINABILITY

Here's a good example of that expectations. 81% of Gen Z and 82% of Millennials agree it's important that the companies they buy from are clear about what values they stand for and 66% of Gen Z are willing to pay more for a product if it's tied to having a positive impact on society... they are a more community-minded generation than we've seen in a long time – and this is reflective of that mentality.

### It is important to me that the companies I buy from are clear about what values they stand for (% total agree)



**66%**  
of US Gen Z consumers are willing to pay more for a product if the brand tried to have a positive impact on society.

We no longer have time for minor shifts. We need to actively design systems for end goal of localized consumption. Every system should be designed to be equal or better margins than current, better for your workers, and better for the planet. People, planet, and profit – if it's better, you don't have to market it.

**– Lisa Morales-Hellebo**  
*CEO and Co-Founder, REFASHIOND*

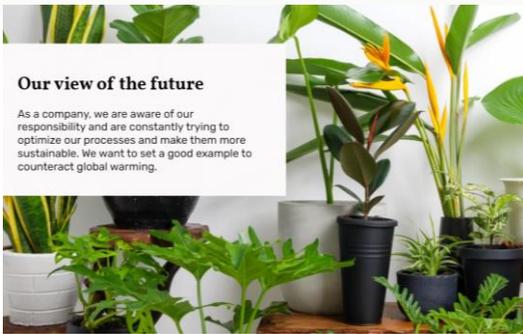
## Kantar's Streetscape missions gave us inspiration



An interesting example from the Netherlands of a company that takes fresh flowers at the end of their life at an event or commercial setting -- and dries them and then sells them as arranged, wrapped dried flowers, giving them a second life.

### Second Life for Flowers

Zero Waste Flowers, a Dutch flower company, is working hard to reduce waste in the floral industry by giving fresh flowers a second life as dried flowers.



#### Our view of the future

As a company, we are aware of our responsibility and are constantly trying to optimize our processes and make them more sustainable. We want to set a good example to counteract global warming.

Kantar's Streetscaper in Berlin told us about a online floral shop that runs its operations at 110% climate positive.

### Climate Positive Plants

Botanicly.de is an online floral shop that runs its operations as a 110% climate positive company



In Korea – GS Retail a convenience store chain offers a eco-friendly flower delivery service that uses walking couriers – rather than motorized delivery methods.

### Walking Floral Deliveries

GS Retail launched an eco-friendly flower service where flowers are delivered via a walking courier.

## Seize the opportunity

We can give people more transparency and let them get some of the story behind the flowers at the same time. Provenance and the story of farmers has been used in food, wine, coffee with great effect – and perhaps it can play a role in growth for floral as well.

We can help people make choices in floral that align with their level of interest and engagement on environmental and other sustainability issues through impact labeling. There are plenty of similar programs like the Marine Stewardship Councils rating system for seafood – and a similar “scoring” system on labels could be used to encourage consumers to purchase more sustainable alternatives (e.g., bouquets wrapped in recycled materials, non-water intensive flowers, etc.)

And finally – we can continue to prepare for the circular economy – by focusing not just on reducing waste and energy use – but by thinking about how to repurpose and upcycle and regenerate or in other words – leave the environment and the communities in which we operate healthier and stronger than they are today.



### Interactive Tracing Apps

Develop an interactive app that traces the journey for flowers from farm to vase, letting users connect and interact with farmers. Utilize the app to engage consumers through storytelling, sharing narratives that enable people to make sense of a brand’s sustainability agenda throughout the value chain.

### Impact Labeling

Develop a product impact labeling system that informs consumers on the social and environmental impacts of bouquets. Consider incorporating a “scoring” system on labels to encourage consumers to purchase more sustainable alternatives (e.g., bouquets wrapped in recycled materials, non-water intensive flowers, etc.).

### Building Circular Resilience

Shift business operations to build long-term climate resilience from source to store through circularity. Recycling water at farms, repurposing packaging waste, and offering composting programs to consumers are tangible changes that offer progressive positive impact.

# Methodology

We used a structured research process and a variety of inputs to achieve these goals

First, we looked to Kantar's proprietary consumer data from a study called US MONITOR which has been conducted annually since 1971. It includes a quantitative survey of over 11,500 respondents age 12+ -- as well as several other elements that help us understand macro and consumer trends

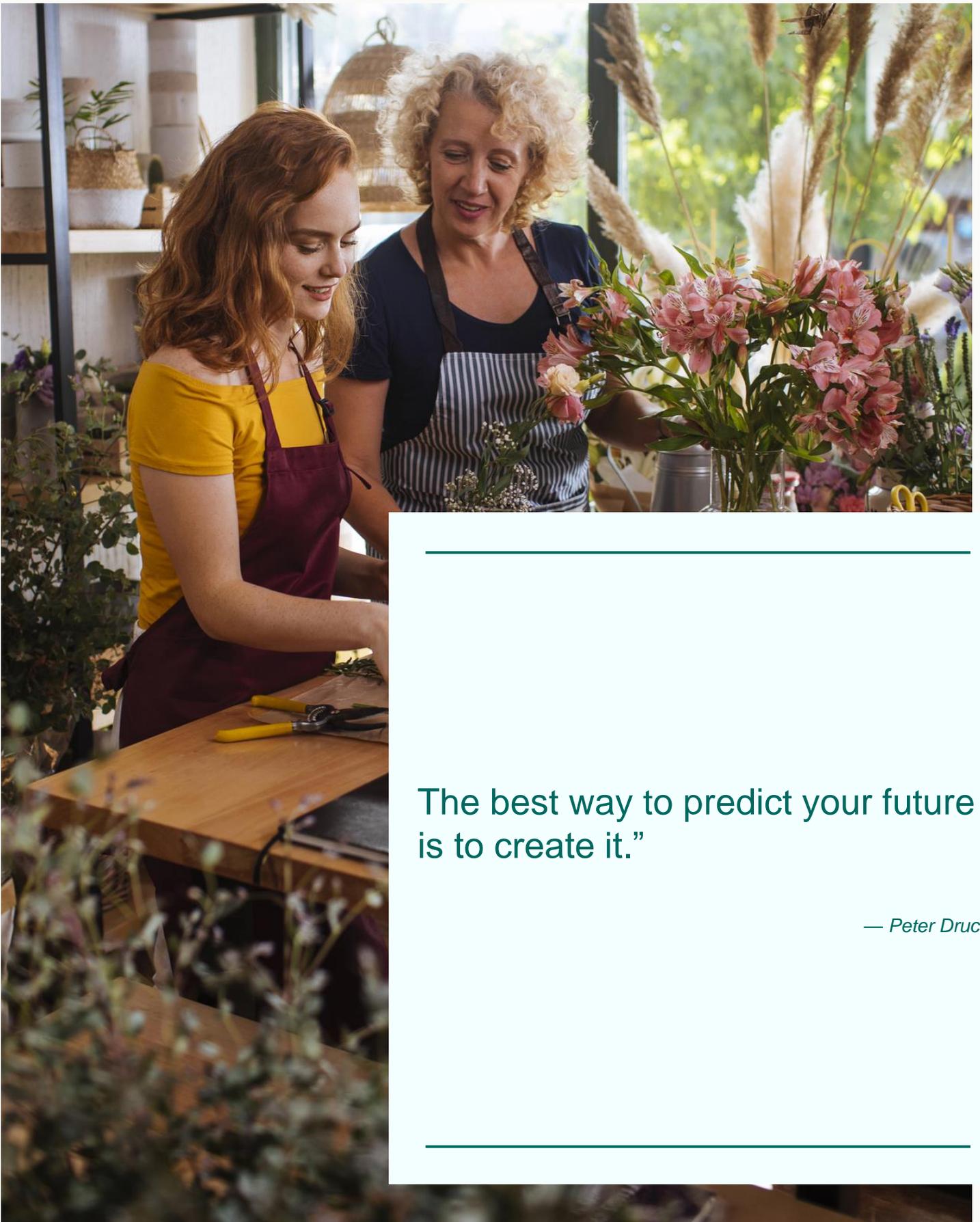
Next, we spoke with experts from a wide variety of backgrounds – to both help test some of our ideas and gather additional perspectives and input about where these people see growth potential for floral.

Our process intentionally has us talking to people outside of the floral industry – because this is often where both opportunity and disruption come from.... Outside one's own industry.

We also included the perspective of IFPA members – and did a series of 15 stakeholder interviews to help get a baseline for what trends members thought were important, what some of the big uncertainties were for the future, and so forth.

Lastly, we used members of Kantar's Streetscape network – which is a network of culturally-connected trend spotters in about 50 countries around the world – to help us look for interesting ways that our growth areas were showing up --- and we had them look both in floral but also in adjacent categories.

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The best way to predict your future  
is to create it.”

— Peter Drucker

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