

INTERNATIONAL

FRESH PRODUCE

ASSOCIATION

2024 China

Floral Industry Brand



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 mediocre, it can be strengthened in marketing by pairing it with the produce industry.
- 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 trustworthy– “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, allowing it to attract 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 China Summary

- Consumer impressions of the *floral industry in China* are favorable and only lag behind dairy and grocery.
 - 79% respondents have a favorable impression
 - 79% of respondents believe the *floral industry* is 'on its way up' or 'improving.'
 - The floral industry has a favorable reputation.

Critically important for the floral industry

- Is innovative
- Has affordable products
- Treats employees fairly.

Floral Industry Personality Traits

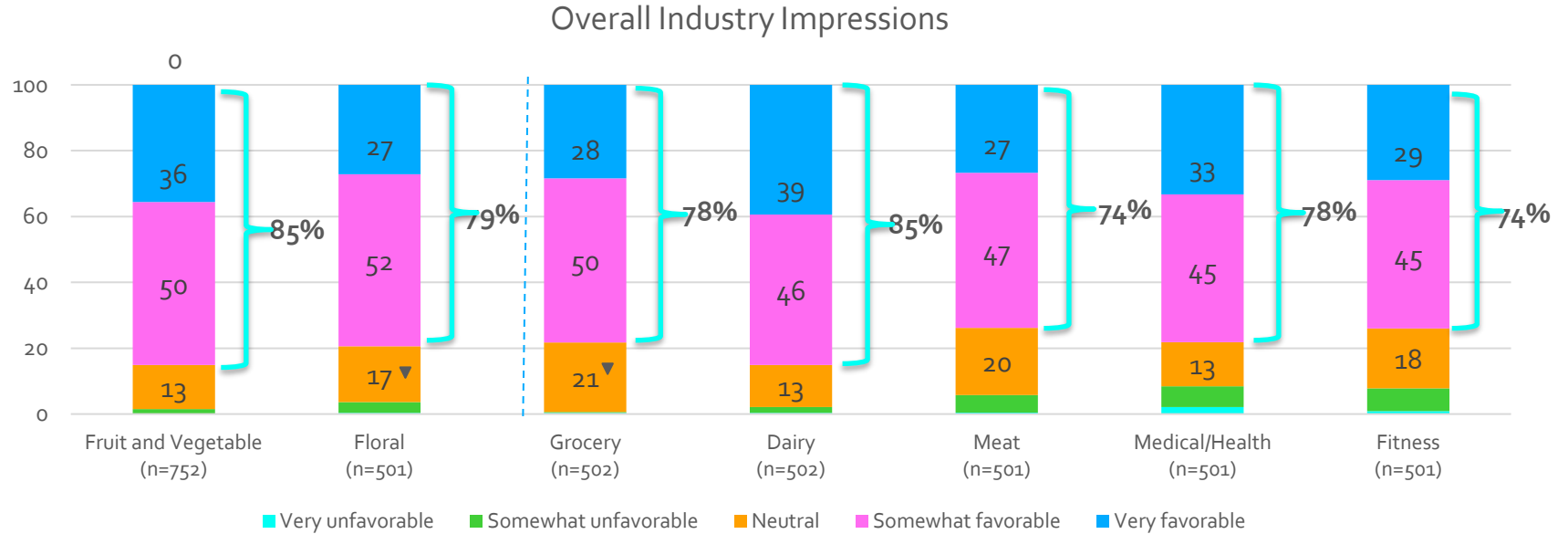
- Fun
- Trendy
- Friendly
- Approachable

- Relative importance analysis indicates a need to communicate the industry as innovative.



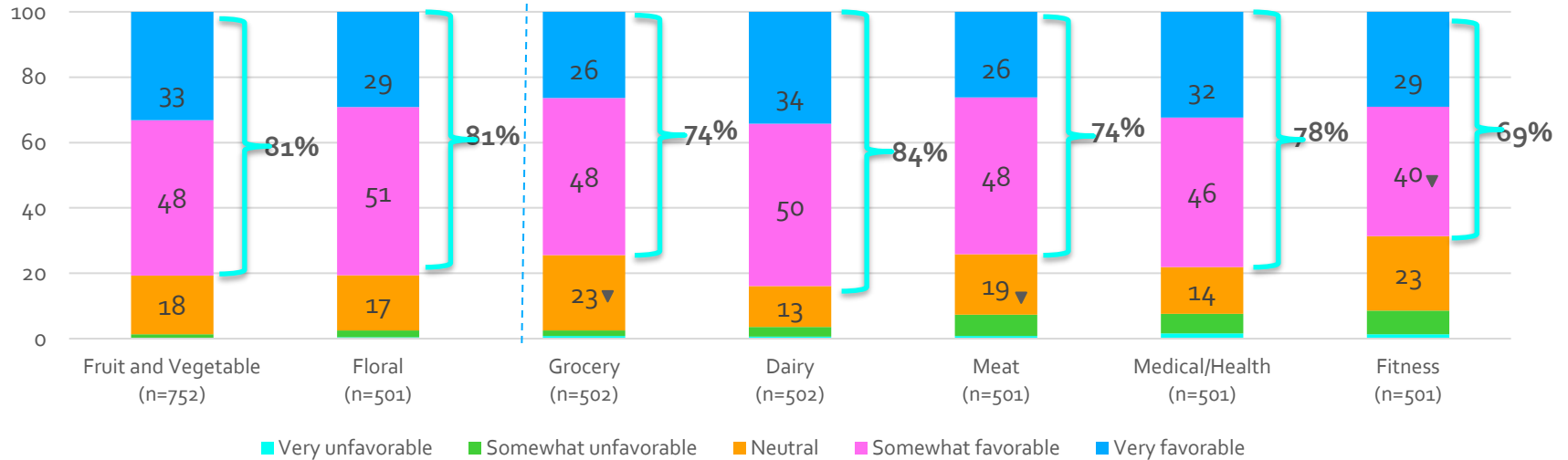
Consumers in China have a favorable impression of the floral industry although it lags behind produce, and dairy.

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



Consumers in China have a favorable impression of the floral industry. Its reputation is on par with the produce industry and only lags behind dairy.

Industry Reputation



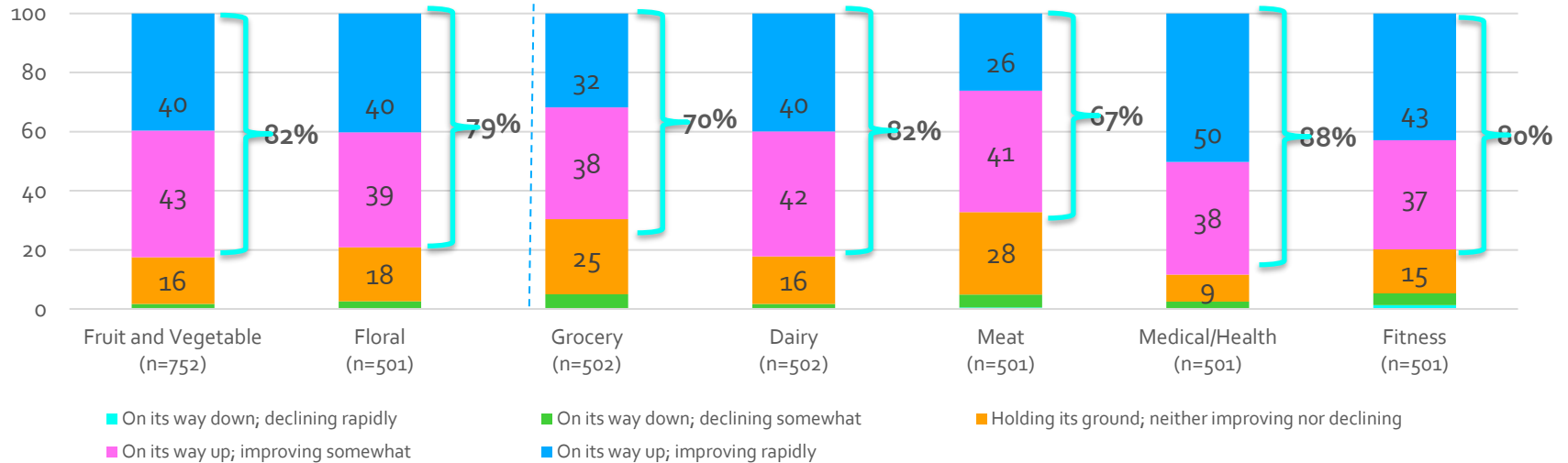
Base: Total China Respondents Evaluating Industry

6. Which of the following best describes what you feel is the current reputation of the [INSERT INDUSTRY]?



Consumers in China perceive the floral industry to be dynamic and on its way up although it lags behind produce, dairy, medical, and fitness.

Industry Momentum



Base: Total China 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]?



China Floral Industry Drivers



Relative Importance for China's 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 China when evaluating the Floral industry are:

- Innovative
- Offers affordable options
- Treats employees fairly.

	Relative Importance	Rank Order
Total China Respondents Evaluating Floral Industry	(501)	
Is innovative	20.18	1
Offers affordable options	9.86	2
Treats employees fairly	9.68	3
Is trustworthy	7.65	4
Uses technology wisely	6.48	5
Makes room for a wide variety of brands	6.20	6
Creates products or services worth paying extra for	5.94	7
Values diversity, equity and inclusion	4.78	8
Is transparent in its production/service methods	4.43	9
Promotes individual health	4.26	10
Adapts quickly to meet the needs of consumers	4.11	11
Promotes public health	3.72	12
Helps solve some of society's most pressing problems	3.61	13
Offers unique products and experiences	3.54	14
Attracts top talent	2.93	15
Is mindful of the environment	2.64	16



Stated vs. Relative Importance – 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
 - ✓ Uses technology wisely
 - ✓ Treats employees fairly

Hidden Opportunities

(High Relative / Low Stated Importance)

- **These drivers may not be expressed but are important positioning attributes.**
 - ✓ Is innovative

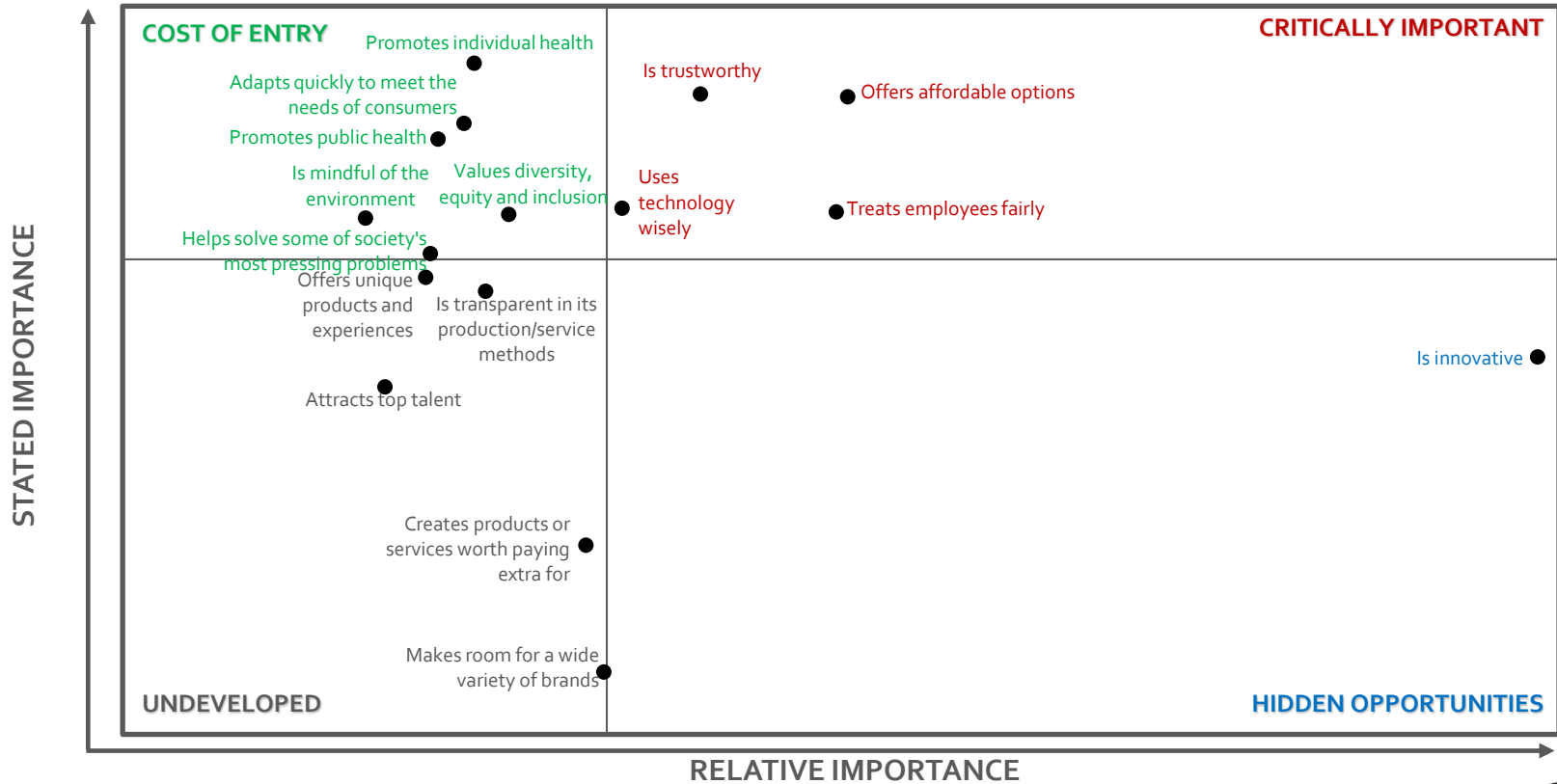
Cost of Entry

(Low Relative / High Stated Importance)

- **These are important for all category industries to deliver. They are necessary but provide no leverage.**
 - ✓ Promotes individual health
 - ✓ Promotes public health
 - ✓ Adapts quickly to meet the needs of consumers
 - ✓ Is mindful of the environment
 - ✓ Values diversity, equity and inclusion
 - ✓ Helps solve some of society's most pressing problems



Stated vs. Relative Importance – Floral Industry

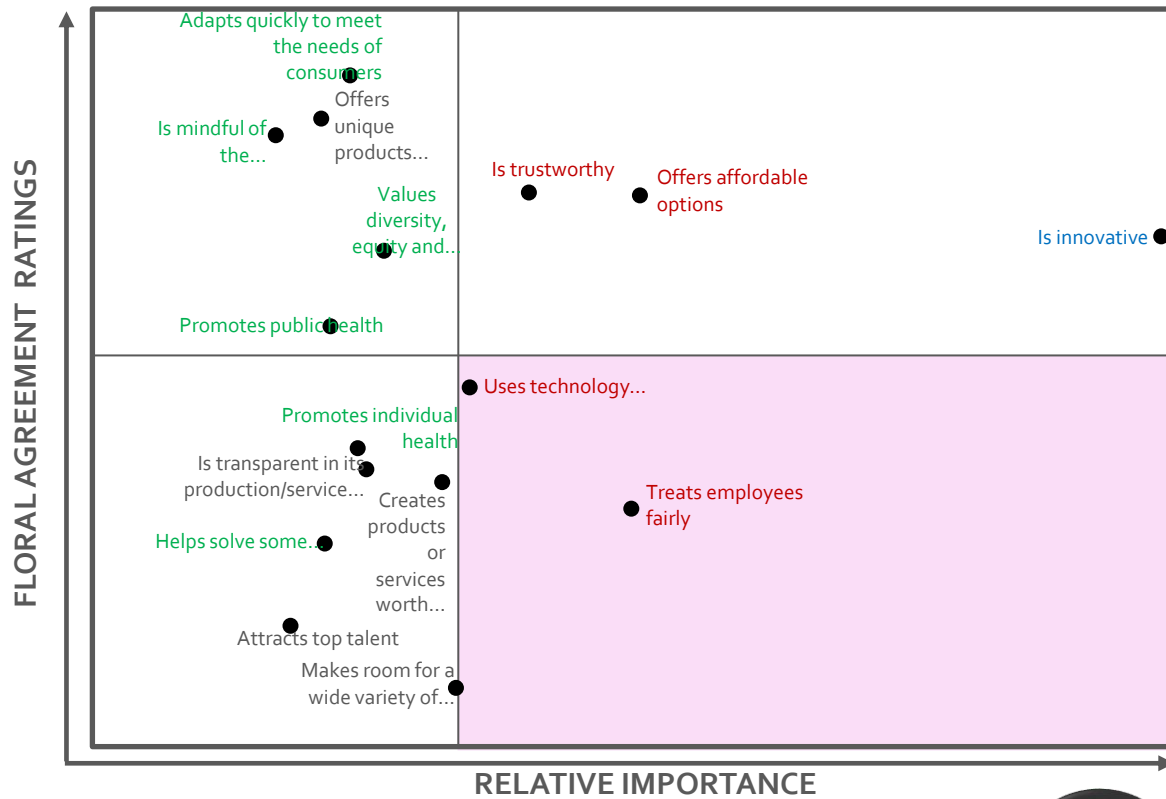


Quadrant Map: Relative Importance vs. Floral Agreement Ratings

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 not delivering on the important drivers of treats employees fairly and uses technology in China.



China Floral Industry Personality



AI Chosen Image to Depict
Floral Industry

	Fruit and Vegetable	Floral	Grocery	Dairy	Meat	Medical/Healthcare	Fitness
Total China Respondents Evaluating Industry	(752)	(501)	(502)	(502)	(501)	(501)	(501)
	%	%	%	%	%	%	%
Trustworthy	37	26	33	40	32	39	23
Approachable	35	34	29	34	23	25	18
Friendly	34	35	32	38	27	31	28
Honest	27	19	27	29	25	21	15
Simple	26	19	27	18	18	10	13
Budget-Conscious	25	12	31	12	23	14	9
Confident	25	24	25	30	24	31	34
Modern	23	31	23	32	19	40	35
Classic	22	12	23	18	30	15	7
Accepting	21	20	20	18	15	20	14
Formal	20	12	21	21	21	23	12
Fun	18	38	21	20	13	13	28
Trendy	15	38	13	16	9	16	40
Casual	14	20	20	11	14	11	17
Expert	10	6	13	9	19	13	10
Adventurous	10	17	10	10	12	20	28
Exotic	7	11	4	5	4	6	24
Consistent	6	2	11	6	13	7	5
Uptight	3	2	2	2	5	7	2
Boring	3	1	4	4	7	5	3
Outdated	2	1	3	2	4	3	1



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.



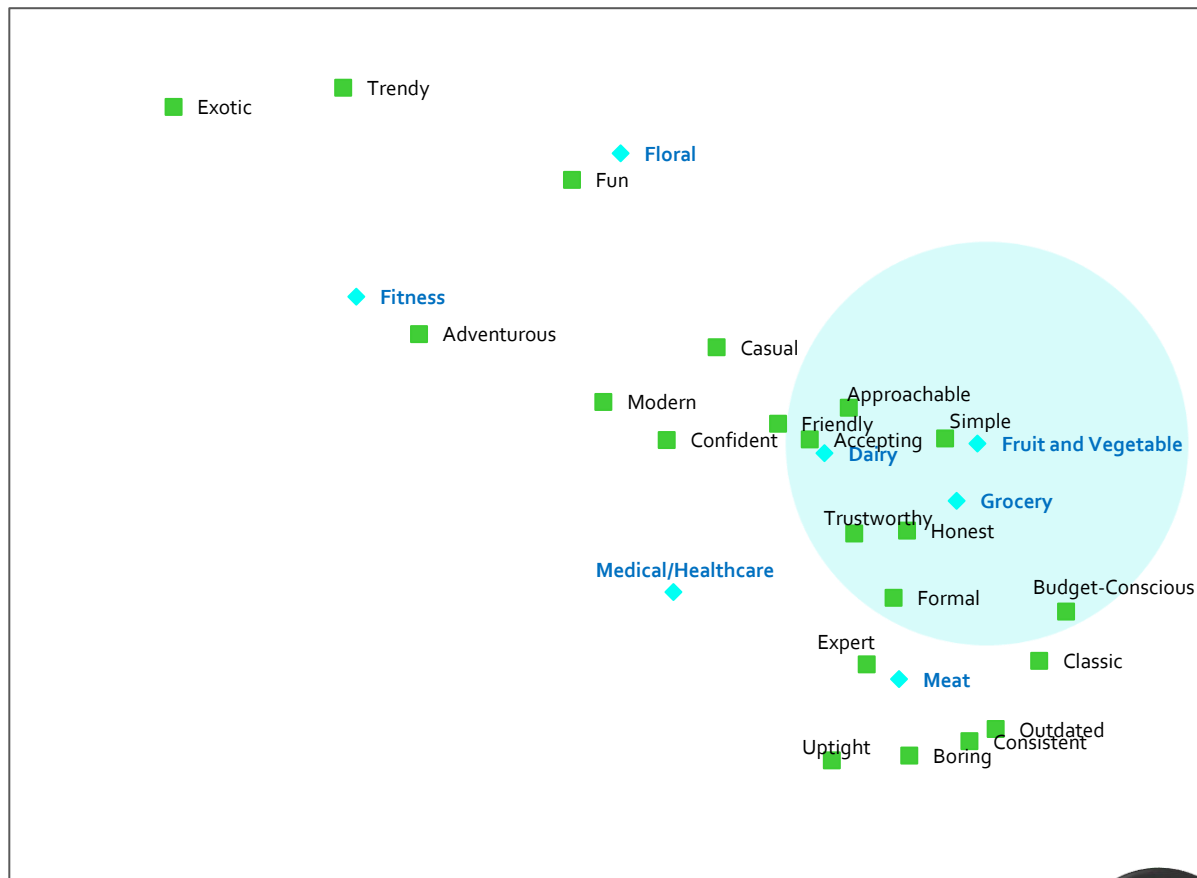
Industry Personality Correspondence Map

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.



China Floral Industry Findings By Key Segments

		Gender		Generation			
	Total China	Male	Female	Gen Z	Millennials	Gen X	Boomers
Total China Respondents Evaluating Floral Industry	(501)	(267)	(234)	(80)	(226)	(116)	(79)
	%	%	%	%	%	%	%
				[Z]	[M]	[X]	[B]
Overall Impression of Industry							
Very Favorable	27	23	34	42	37	19	23
Very/Somewhat Favorable	79	78	81	89	83	79	73
Industry Momentum							
On its way up /Improving rapidly	40	36	46	43	43	31	49
On its way up /Improving rapidly or somewhat	79	77	82	82	82	71	87
Industry Reputation							
Very Favorable	29	24	37	44	37	22	25
Very/Somewhat Favorable	81	80	81	84	82	83	74



Floral Industry Findings By Key Segments

Gen Z and Millennials are significantly more likely to have a strong overall Impression of the Floral industry.

		Gender		Generation			
	Total China	Male	Female	Gen Z	Millennials	Gen X	Boomers
Total China Respondents Evaluating Floral Industry	(501)	(267)	(234)	(80)	(226)	(116)	(79)
	%	%	%	%	%	%	%
				[Z]	[M]	[X]	[B]
Adapts quickly to meet the needs of consumers	83	80	86	82	89	76	86
Offers unique products and experiences	81	78	86	87	84	76	84
Is mindful of the environment	81	79	84	83	89	77	77
Is trustworthy	79	76	82	88	85	72	78
Offers affordable options	79	74	86	84	85	78	71
Is innovative	77	76	80	88	85	74	69
Values diversity, equity and inclusion	77	77	77	88	81	72	75
Promotes public health	74	69	82	83	87	68	66
Uses technology wisely	72	73	71	81	83	70	60
Promotes individual health	70	66	76	84	81	65	61
Is transparent in its production/service methods	69	67	74	70	80	70	57
Creates products or services worth paying extra for	69	66	73	81	81	67	55
Treats employees fairly	68	66	71	80	78	64	59
Helps solve some of society's most pressing problems	67	64	71	76	76	61	62
Attracts top talent	64	63	66	76	70	65	52
Makes room for a wide variety of brands	62	62	63	76	71	59	51



Floral Industry Findings By Key Segments

	Total China	Gender		Generation			
		Male	Female	Gen Z	Millennials	Gen X	Boomers
Total China Respondents Evaluating Floral Industry	(501)	(267)	(234)	(80)	(226)	(116)	(79)
	%	%	%	%	%	%	%
				[Z]	[M]	[X]	[B]
Fun	38	34	44	27	43	36	42
Trendy	38	40	34	21	40	33	50
Friendly	35	35	34	26	37	35	34
Approachable	34	34	35	33	32	31	43
Modern	31	30	32	20	32	33	31
Trustworthy	26	28	24	25	20	29	30
Confident	24	21	29	21	31	18	28
Casual	20	20	21	20	19	18	25
Accepting	20	20	20	18	21	20	21
Simple	19	17	23	17	19	15	27
Honest	19	19	19	18	18	18	22
Adventurous	17	17	17	10	15	15	24
Classic	12	14	10	6	13	15	11
Formal	12	14	9	6	13	16	8
Budget-Conscious	12	15	7	19	11	11	11
Exotic	11	12	9	5	10	15	8
Expert	6	7	5	4	6	9	2
Consistent	2	2	2	8	2	0	3
Uptight	2	1	2	1	1	3	1
Boring	1	2	1	1	1	3	0
Outdated	1	2	1	1	1	3	0



Shopping Habits

Gen Z shop more frequently and are more likely to have flowers on this shopping list.

	Gender		Generation				Income		
	Total China	Male	Female	Gen Z	Millennials	Gen X	Boomers	Under RMB 15,000	RMB 15,000 or More
Total China Respondents	(752)	(386)	(366)	(122)	(352)	(162)	(116)	(215)	(536)
	%	%	%	%	%	%	%	%	%
Responsibility for Grocery Purchases									
Primarily responsible	87	84	92	87	94	85	84	74	95
Share responsibility	13	16	8	13	6	15	16	26	5
Frequency of Purchasing Groceries									
Several times per week	55	54	57	75	59	43	60	52	57
Once a week	32	34	30	15	33	37	32	31	33
2 to 3 times per month	12	12	12	8	8	19	9	16	10
Once a month	1	0	2	3	0	1	0	1	0
Mean times per month:	6.3	6.3	6.3	7.2	6.5	5.6	6.6	6.1	6.4
Groceries Purchase on a Regular Basis									
Fresh produce (fruits and vegetables)	95	95	95	97	95	94	96	94	96
Dairy milk	87	85	89	85	93	84	85	82	90
Beef and/or poultry	85	81	90	57	93	79	96	84	85
Fresh flowers	30	20	42	31	45	24	20	21	34



Shopping Habits

		Gender		Generation				Income	
	Total China	Male	Female	Gen Z	Millennials	Gen X	Boomers	Under RMB 15,000	RMB 15,000 or More
Total China Respondents	(752)	(386)	(366)	(122)	(352)	(162)	(116)	(215)	(536)
	%	%	%	%	%	%	%	%	%
Typical Grocery Purchase Locations *									
Supermarket/Grocery Store	93	93	94	97	92	93	94	96	92
Online retailer	74	73	75	88	82	71	62	56	84
Mass Merchandiser	64	62	66	77	75	49	67	50	71
Farmer's Market/Farm Store	56	59	53	39	52	58	66	63	52
Convenience Store	53	51	57	76	67	39	49	52	55
Warehouse Club	35	28	44	37	51	31	20	14	46
Drug Store	10	11	9	18	14	6	8	9	10
Dollar Store	6	6	6	5	7	5	7	2	8

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



Demographic Summary

		Gender		Generation				Income	
	Total China	Male	Female	Gen Z	Millennials	Gen X	Boomers	Under RMB 15,000	RMB 15,000 or More
Total China Respondents	(752)	(386)	(366)	(122)	(352)	(162)	(116)	(215)	(536)
	%	%	%	%	%	%	%	%	%
Gender									
Male	57	100	-	55	33	73	62	59	56
Female	43	-	100	45	67	27	38	41	44
Generation									
Gen Z (18 - 26)	11	11	12	100	-	-	-	8	12
Millennials (27 - 42)	28	16	43	-	100	-	-	11	37
Gen X (43 - 58)	36	46	23	-	-	100	-	37	35
Boomers (59 - 78)	25	27	22	-	-	-	100	43	15
Mean Age:	45.7	47.9	42.7	22.9	34.7	48.3	64.2	52.0	42.2
Marital Status									
Married	82	81	84	33	90	88	87	77	85
Not Married	18	19	16	67	10	12	13	23	15



Demographic Summary

		Gender		Generation				Income	
	Total China	Male	Female	Gen Z	Millennials	Gen X	Boomers	Under RMB 15,000	RMB 15,000 or More
Total China Respondents	(752)	(386)	(366)	(122)	(352)	(162)	(116)	(215)	(536)
	%	%	%	%	%	%	%	%	%
Employment Status									
Employed	79	82	77	90	99	95	31	59	91
Not Employed	20	18	23	10	1	5	68	40	9
Education									
Less than high school	7	6	9	0	1	6	20	19	1
High school	35	44	22	64	6	49	33	37	33
College	58	50	69	36	93	46	46	44	66
Median Monthly Household Income:	RMB 19.6K	RMB 19.0K	RMB 20.5K	RMB 21.5K	RMB 24.7K	RMB 18.5K	RMB 12.8K	RMB 9.7K	RMB 23.4K



Demographic Summary

	Gender		Generation				Income		
	Total China	Male	Female	Gen Z	Millennials	Gen X	Boomers	Under RMB 15,000	RMB 15,000 or More
Total China Respondents	(752)	(386)	(366)	(122)	(352)	(162)	(116)	(215)	(536)
	%	%	%	%	%	%	%	%	%
Area Live In									
Beijing Municipality	17	17	17	16	19	12	23	12	20
Guangdong Province	15	13	17	17	20	12	13	8	19
Shanghai Municipality	14	12	18	8	23	16	4	5	19
Jiangsu Province	6	6	6	6	5	6	8	9	4
Chongqing Municipality	5	4	5	5	8	4	2	2	6
Anhui Province	4	5	3	12	2	3	5	6	3
Zhejiang Province	4	4	4	2	4	4	5	4	4
Henan Province	4	4	4	6	3	4	3	4	3
Fujian Province	3	4	2	6	2	4	3	4	3
Sichuan Province	3	3	3	2	3	3	4	3	3
Hubei Province	3	3	2	2	1	4	3	4	2
Hebei Province	3	2	3	1	2	4	3	5	1
Liaoning Province	2	3	2	3	1	3	3	5	1
Shandong Province	2	3	2	3	2	2	3	4	1
Hunan Province	2	2	3	2	0	3	4	4	1
Heilongjiang Province	2	3	1	3	0	3	3	4	1
Jiangxi Province	2	2	1	0	1	2	3	3	1
Tianjin Province	2	2	2	1	1	3	3	3	2
Shanxi Province	2	2	1	1	1	3	0	3	1
Shaanxi Province	2	2	1	2	1	1	3	2	2

Note: Only areas with 2% or more mentions among Total Respondents are shown

