



The Strategic Counsel

21 St. Clair Avenue East
Suite 800
Toronto, Ontario
M4T 1L9
Tel: 416-975-4465
Fax: 416-975-1883

www.thestrategiccounsel.com



FLOWERS CANADA
ONTARIO

A REPORT TO FLOWERS CANADA ONTARIO

Usage and Attitude Survey among
Millennial Women

June 2016



TABLE OF CONTENTS

1	Background, Objectives and Methodology	3
2	Key Findings and Recommendations	5
3	Advertising Recall and Logo Recognition	11
4	Incidence of Undertaking Floriculture Activities	19
5	Outdoor Gardening	29
6	Houseplants	35
7	Cut Flowers	41
8	Gifting Cut Flowers and Houseplants	47
9	Perceptions and Attitudes about Cut Flowers and Houseplants	54
10	Factors that Influence the Purchase of Cut Flowers and Houseplants	61
11	About the Home/Living Environment	71
12	Demographics	79



BACKGROUND, OBJECTIVES AND METHODOLOGY

Background, Objectives and Methodology

- ❖ Flowers Canada Ontario wishes to measure awareness of its public facing brand, 'pickOntario'. As well, a key concern for the floriculture sector in Ontario is the limited interest the generation of millennial women has in purchasing floral arrangements. While women have traditionally been the main purchasers of flowers, and do so for a variety of reasons, the emerging generation does not seem to be repeating this pattern of behaviour.
- ❖ The primary objectives of this research are:
 - To gauge brand recognition among the target demographic of millennial women;
 - To better understand what might be driving this generational change of behaviour; and
 - To identify floral products/activities/strategies that will engage this generation and lead to an increased interest in floriculture.
- ❖ The Strategic Counsel set out to meet these objectives through a combination of qualitative and quantitative methodologies: In-person focus groups were followed by a quantitative survey that was deployed to an online panel.
- ❖ This report focuses exclusively on the findings from the quantitative phase of this research program, conducted via an online survey.
- ❖ A combination of regional, gender and age quotas and weights were applied to obtain a sample of n=400 millennial women (ages 25 to 35) plus, for comparative purposes, a sample of n=100 among each of three 'control group' segments: millennial men (ages 25 to 35), post-millennial women (ages 36 to 55) and post-millennial men (ages 36 to 55).





KEY FINDINGS AND RECOMMENDATIONS

To compete with other commonly gifted items, there is a need to stimulate awareness among post-millennial women.

The majority of millennial women do not recall ever having seen, read or heard advertising about flowers. Recall of advertising related to houseplants is even lower. Recall of flower and houseplant advertising is particularly low among non-consumers – those who have never purchased cut flowers and houseplants.

Importantly, there is much greater recall of advertising for most of the other items tested. A couple of the **items for which there is high advertising recall – namely beer and especially wine - compete directly with cut flowers and houseplants** when it comes to buying gifts for others.

Across the board, among millennials and post-millennials alike, recognition of the pickOntario logo is very low. In fact, only 10% of millennial women recognize the pickOntario logo, while 74% recognize 'VQA'. This is noteworthy given that wine is in direct competition with cut flowers and houseplants with respect to gifting.

Millennial women express interest in gifting flowers, but may need some encouragement to purchase them more often for themselves.

Millennial women purchase cut flowers less frequently than do post-millennial women.

Yet, millennial women report having gifted cut flowers in the past to the same extent as post-millennials. High proportions of millennial women indicate that there are many occasions for which they would purchase flowers for someone as a gift. Importantly, for many occasions (such as a birthday, housewarming and anniversary celebration), **millennial women are more likely than the other three cohorts to indicate a likelihood to gift flowers – likely due in part** to the perception among the vast majority of this age/gender cohort that **cut flowers are appreciated by those receiving them, and rank second only to wine in terms of an overall ‘appreciative’ score.**

While **cut flowers are more likely to be gifted by millennial women than houseplants**, they are less likely to be gifted than wine, and are perceived to be less easy to gift in comparison to other mentioned items (such as chocolates and gift cards).

People (regardless of age or gender) are **far more likely to buy flowers for others, than for themselves.** In fact, among millennial women, one of the top-three words associated with cut flowers is ‘gift’. And when buying flowers, people will generally spend less on themselves than others. In fact, **millennial women will spend less on themselves than will the other three age/gender cohorts.** There may be an opportunity to encourage millennial women to purchase flowers more often for themselves, especially given that fully three-quarters of them agree that it is nice to have fresh flowers in the home.

About seven-in-ten millennial women admit that ‘cost’ and the perception that ‘they don’t last’ are barriers to purchasing flowers. Consider testing marketing messages that aim to alter these perceptions.

Messaging about the benefits of flowers ‘purifying the air’, ‘improving mental health’ and their ‘healing effect’ tested best, and might help to motivate purchase.

Millennial women are also a good target market for houseplants, although there are barriers that prevent them from keeping plants in their homes.

Houseplants are not purchased frequently: a substantial proportion of women 25 to 35 years of age report never purchasing houseplants (22%), or buying them less than once a year (24%). Still, **millennial women purchase houseplants more frequently than do post millennial women.**

As well, **millennial women report having gifted houseplants to the same degree as millennial men and women.** And in fact, **for many occasions including birthday parties and housewarmings, millennial women express greater interest than the other three cohorts in gifting houseplants.** Yet, houseplants compete with other far more commonly gifted items such as wine. In fact, millennial women believe that their friends would appreciate a gift of wine more so than a houseplant.

Women typically take care of the houseplants in the home. Yet, millennial women are less inclined to keep them in the home and tend to keep fewer in the home than post millennial men and women. To some extent, this may be a factor of dwelling type: those who keep plants in the home are more likely to live in a detached home, and millennials are less likely to live in a detached home, in comparison to post-millennials.

Another barrier is that millennial women – more so than others - report a **lack of knowledge about how to care for houseplants.** This issue that could potentially be addressed through an educational-based or knowledge-building campaign.

Marketing about houseplants should include mention of positive words most associated with them (green, natural and fresh), and remind people that houseplants provide ‘nature in the home’ and ‘add to a home’s decor’, as high proportions of millennial women agree with these viewpoints.

When it comes to outdoor gardening, millennial women do not surface as an easy target market.

Compared to the other three age/gender cohorts, **millennial women are less likely to indicate that they have gardened in the past**, and, more importantly, **they are also less likely to report an intention to garden outdoors, going forward**.

Outdoor gardening is most common among homeowners, and those with a yard, and millennial women are least likely of the four age/gender cohorts to meet these two criteria. Rather, millennial women are far more likely than others to live in an apartment/condo (40% do). Two recommendations stem from this finding:

- For gardening in particular, consider expanding the target market beyond millennial women.
- **To reach and engage millennial women in the activity of gardening, promotions and communications about ‘balcony gardening’ might be worthwhile.**

Those who intend to outdoor garden are more interested in growing flowers than herbs or vegetables. This finding is consistent across all four gender/age cohorts.

Those who have gardened, or intend to garden, like most the idea of ‘watching plants grow’ (50% do), ‘being outdoors’ (52%), and ‘growing your own food and becoming self-sufficient’ (56%). Of note, compared to the other three age/gender cohorts, a greater proportion of millennial women view self-sufficiency as a benefit of gardening. Therefore, **a message about ‘self sufficiency’ might resonate and work to encourage more millennial women to garden.**

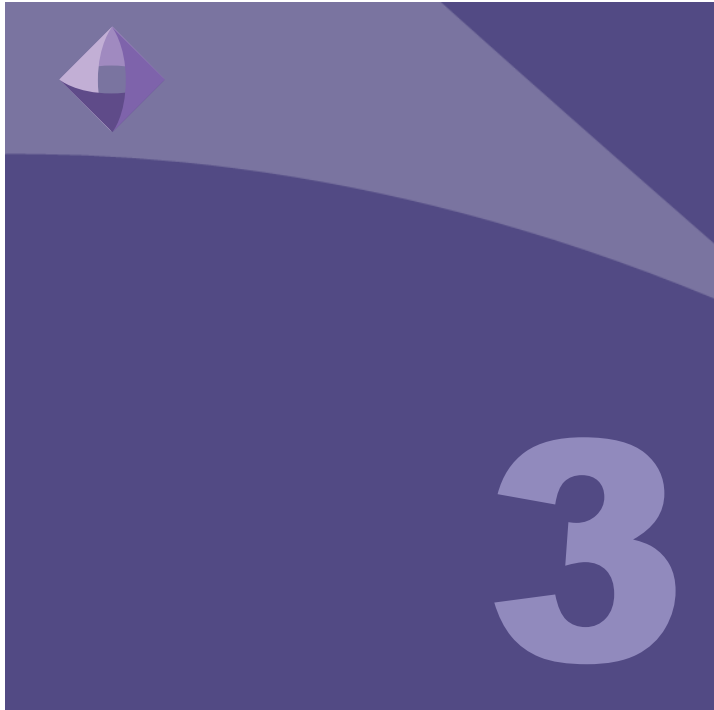
Findings point to strategies that might help to engage millennial women and motivate increased interest in floriculture.

Millennial women express concern for the health and population of pollinators. In fact, the level of concern expressed about pollinators surpasses that for pesticide usage. Ensure marketing communications are aligned with this concern by **emphasizing how flowers, plants and gardening are helping to protect pollinator species.**

Secondly, in the survey, the **proportion of millennial women willing to purchase orchids at a price of \$19.95 was significantly greater among those shown a picture that included a tag stating: 'blooms for months and lasts for years'.** This finding lends support to the idea of **communicating the benefits of flowers and plants at the 'point of sale'** as a means of encouraging purchase.

Those who grew up in a home in which flowers/plants were sometimes/always present and those with a parent who was an 'avid' gardener when they were growing up tend to show greater than average interest in floriculture. **Consider marketing that taps into feelings of nostalgia among the target market.**

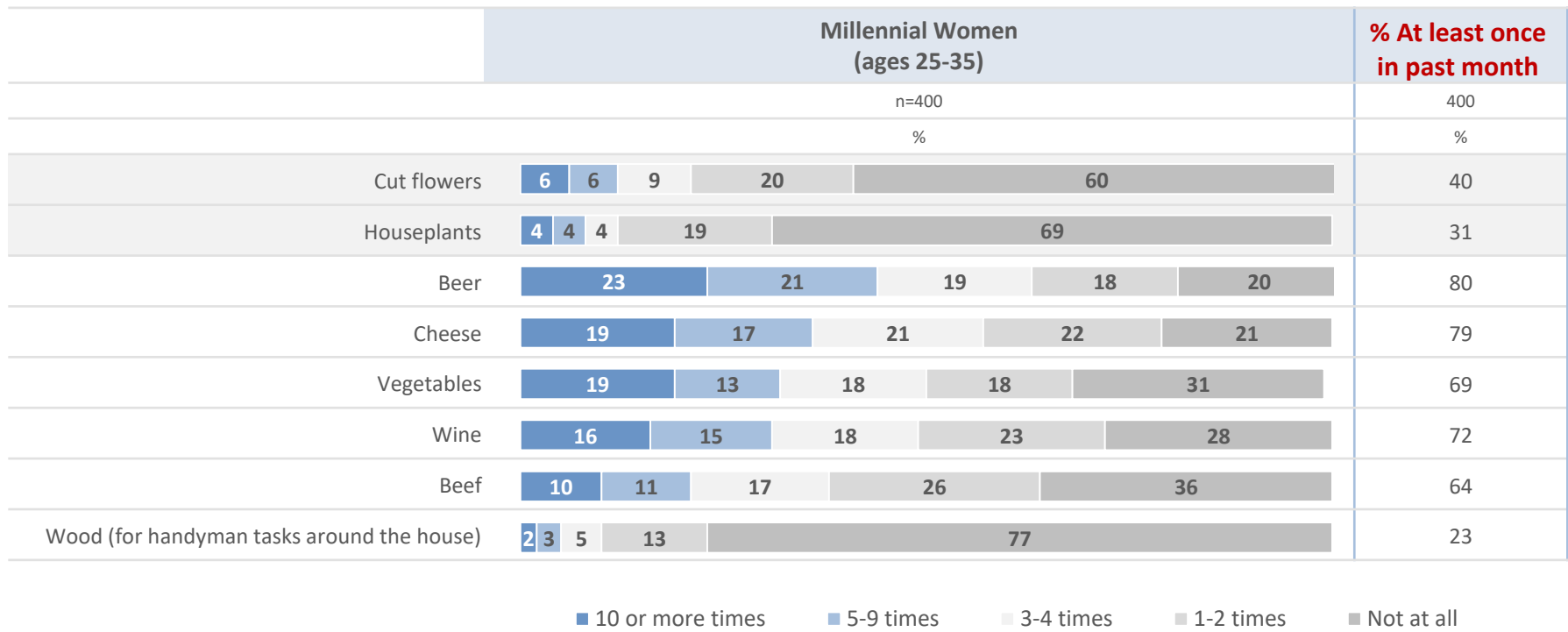
Finally, those who value organically grown food products show greater than average interest in floriculture. In developing a marketing plan, look for ways to specifically target this high potential segment.



ADVERTISING RECALL AND LOGO RECOGNITION

Among millennial women, four-in-ten recall having seen advertising about cut flowers at least once in the past month, and three-in-ten say the same about houseplants. Comparatively, a greater proportion of this group report having been exposed to advertising for other items such as beer, cheese, wine and vegetables.

PAST-MONTH RECALL OF ADVERTISING/PROMOTIONAL MATERIAL



Q2. To the best of your recollection, how frequently in the last month have you seen, read or heard promotional material or advertising for each of the following:
 Base: Total Sample

Recall of advertising about cut flowers and houseplants is fairly strong among those engaged in floriculture (those who have purchased in the past 3 months). On the other hand, those who have never purchased cut flowers or houseplants are far less likely to recall seeing these items advertised.

- Comparatively, advertising for beer, wine, cheese and beef is strongly recalled even among those who never purchase these items. Compared to flowers and houseplants, ads for these products appear less targeted and reach a broader audience that includes non-consumers.

PROPORTION WHO RECALL SEEING ADVERTISING/PROMOTIONAL MATERIAL FOR THE MENTIONED ITEM AT LEAST ONCE IN THE PAST MONTH

Among Millennial Women

	Among total sample (regardless of purchasing behaviours)	Among those who have NEVER purchased the mentioned item	Among those who purchased the mentioned item within the past 3 months
	%	%	%
Cut flowers	40	26	62
Houseplants	31	19	67
Beer	80	68	87
Cheese	79	BTS	80
Vegetables	69	BTS	69
Wine	72	60c	79
Beef	64	60	67
Wood (for handyman tasks around the house)	23	16	66c

Q2. To the best of your recollection, how frequently in the last month have you seen, read or heard promotional material or advertising for each of the following:
 Base: varies
 c: Caution, base too small
 BTS: Base too small to report

Recall of advertising/promotional material related to cut flowers is greater among millennial women than the other three gender/age cohorts. For houseplants, post-millennial women are less likely than the other three segments to recall advertising.

PAST-MONTH RECALL OF ADVERTISING/PROMOTIONAL MATERIAL

% At least once in the last month

	Millennial Women (ages 25-35)	Post Millennial Women (ages 36-55)	Millennial Men (ages 25 -35)	Post Millennial Men (ages 36-55)
	n=400	100	100	100
	%	%	%	%
Cut flowers	40	32	39	37
Houseplants	31	20	34	32

Among Millennial Women, past month recall of advertising/promotional material of both flowers and houseplants is higher among...

- those born outside of Canada
- those who believe it important to purchase organically grown produce
- those who sometimes/always had flowers/plants in the home growing up
- those who report at least one parent was an 'avid' gardener
- those who make these purchases on a more frequent basis

Q2. To the best of your recollection, how frequently in the last month have you seen, read or heard promotional material or advertising for each of the following:
Base: Total Sample

Elsewhere in the survey, respondents are asked about the extent to which they recall ever seeing, reading or hearing advertising about flowers. Almost six-in-ten millennial women indicate that they don't recall ever seeing, reading or hearing advertising for flowers.

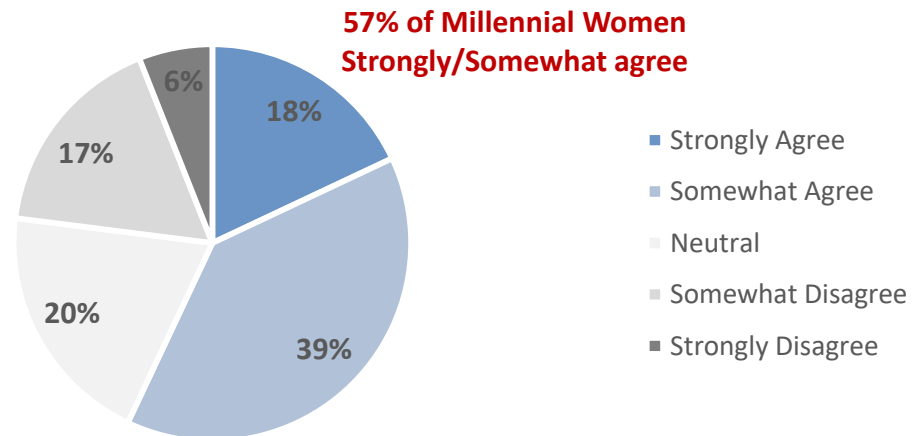
- The proportion who 'agree' to this statement is slightly lower among post-millennial women (49%) – meaning that this group is MORE likely to have seen, read or heard advertising for flowers. Agreement is slightly higher among millennial men (62%) – meaning that recall of flower advertising is lower among this age/gender cohort.

LEVEL OF AGREEMENT WITH THE STATEMENT:

I don't recall ever seeing, reading or hearing much advertising for flowers

Among Millennial Women...

- Those born outside of Canada are slightly less likely to agree (in other words, more likely to recall flower advertising, compared to those born in Canada).
- Those living with a parent, roommate or someone else are less likely to agree with the statement, compared to those living on their own or with a spouse/partner.



Q36. This question asks you to consider various statements - some are about houseplants and some are about cut flowers. Please indicate the extent to which you agree or disagree with each of the following statements.

Base: Total Sample



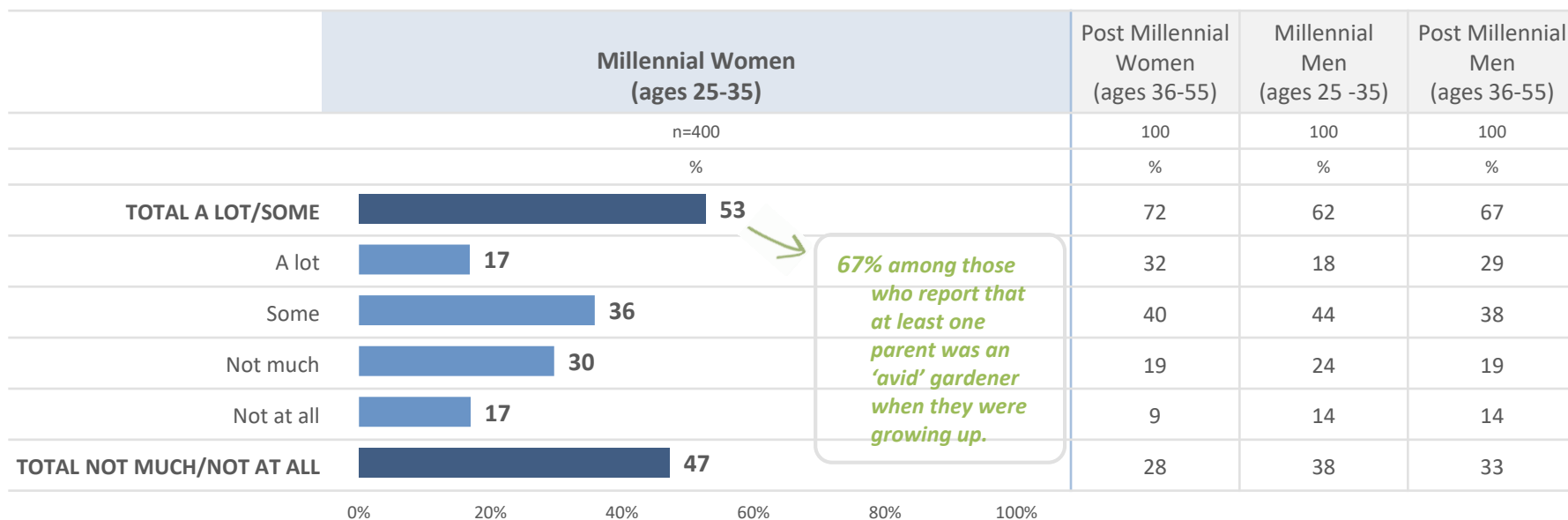
INCIDENCE OF UNDERTAKING FLORACULTURE ACTIVITIES

About half of millennial women indicate having done at least some gardening in the past. The incidence of having gardened in the past is greater among the other 3 segments than it is among millennial women.

- Millennials are less likely than post-millennials (both men and women) to indicate having done 'a lot' of gardening.

INCIDENCE OF HAVING GARDENED IN THE PAST

% A lot/Some



Q7b. In the past, to what extent have you personally done any outdoor gardening?

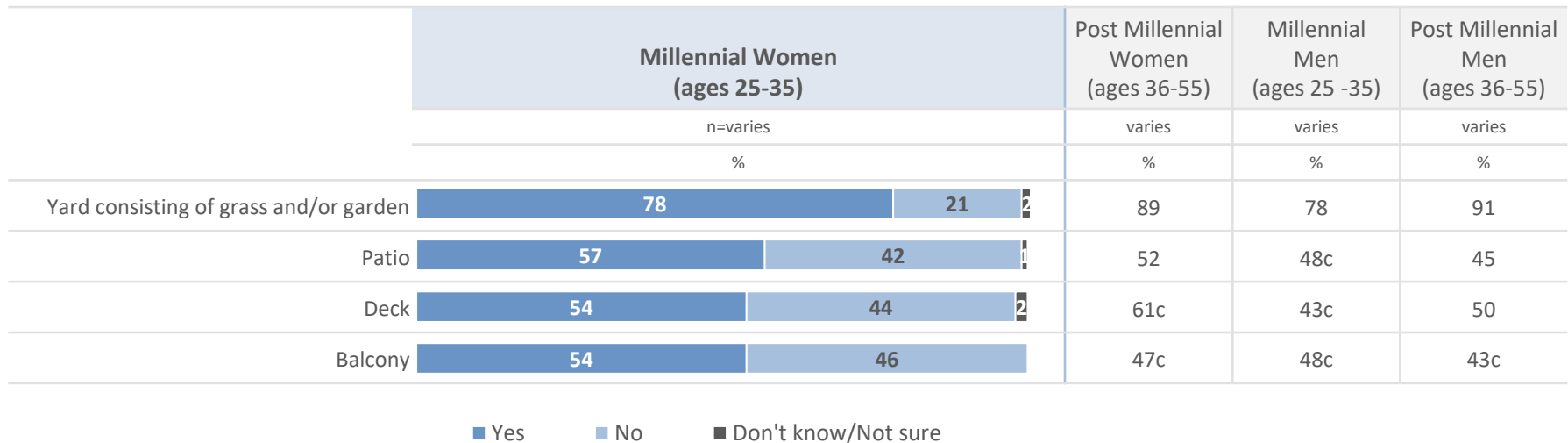
Base: Total Sample

Among millennial women, outdoor gardening is most common among those with a yard.

- Compared to millennials, men and women ages 36 to 55 are slightly more likely to report having gardened in a yard.

INCIDENCE OF HAVING GARDENED IN THE PAST ON...

% Yes, have gardened in the past on...

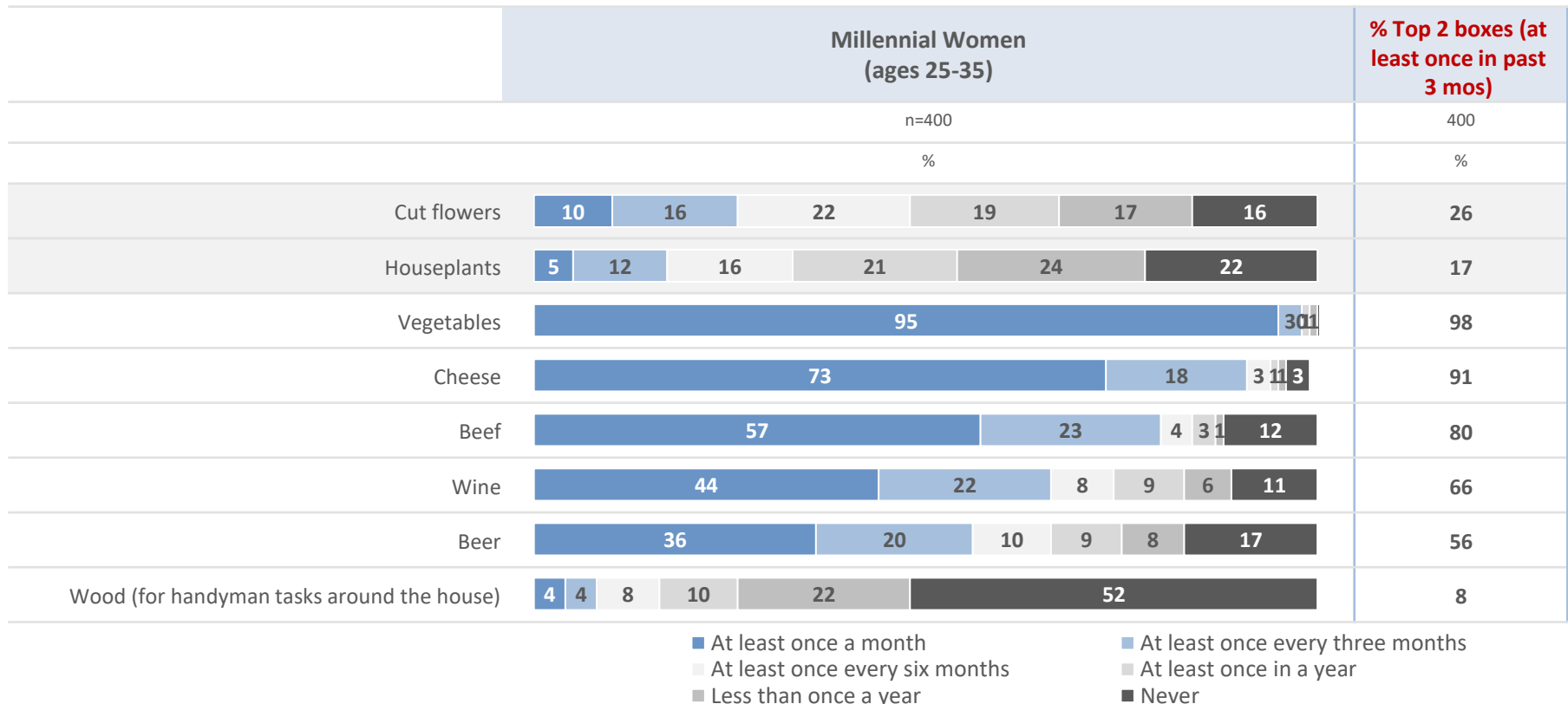


Q8. In the past, have you grown anything or done any gardening on your...

Base: Those who live in a home that has the mentioned feature (base size varies) n=138 (balcony); 184 (patio); 146 (deck); 225 (yard) for millennial women

About one-quarter of millennial women report purchasing cut flowers at least once every three months. Houseplants are purchased somewhat less frequently. With the exception of ‘wood’, the other tested items are purchased far more often than either cut flowers or houseplants.

FREQUENCY OF PURCHASING VARIOUS ITEMS INCLUDING CUT FLOWERS AND HOUSEPLANTS



Q1. How frequently do you personally purchase the following?
Base: Total Sample

Millennial women (17%) are even more likely than post-millennial women (8%) to purchase houseplants at least once every 3 months.

FREQUENCY OF PURCHASING HOUSEPLANTS

	Millennial Women (ages 25-35)	Post Millennial Women (ages 36-55)	Millennial Men (ages 25 -35)	Post Millennial Men (ages 36-55)
	n=400	100	100	100
At least...	%	%	%	%
Once a month	5	2	5	3
Once every 3 months	12	6	10	11
Once every 6 months	16	19	21	13
Once a year	21	15	16	17
Less than once a year	24	39	19	35
Never	22	20	28	20

Among Millennial Women purchase frequency is greater among...

- those living alone or with a partner/spouse than those living with their parents, a roommate or someone else.
- those who sometimes/always had flowers/plants in the home growing up.
- those who report at least one parent was an 'avid' gardener
- those who believe it important to purchase organically grown produce also make these purchases on a more frequent basis.
- home-owners (compared to those who rent).

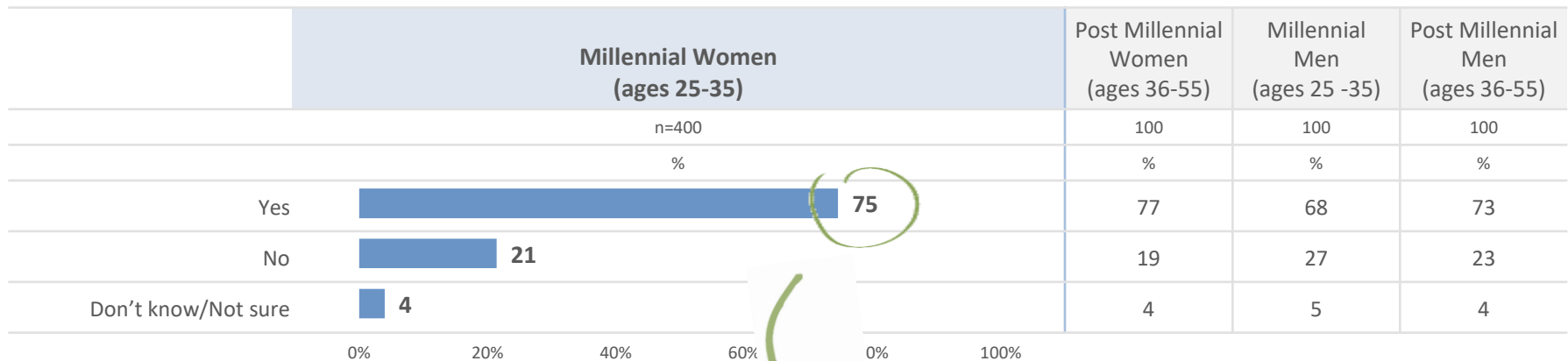
Q1. How frequently do you personally purchase the following?

Base: Total Sample

Three-quarters of millennial women have purchased a houseplant as a gift for someone.

- Millennial men are the least likely age/gender cohort to report having ever bought a houseplant for someone else.

INCIDENCE OF HAVING BOUGHT A HOUSEPLANT AS A GIFT FOR SOMEONE



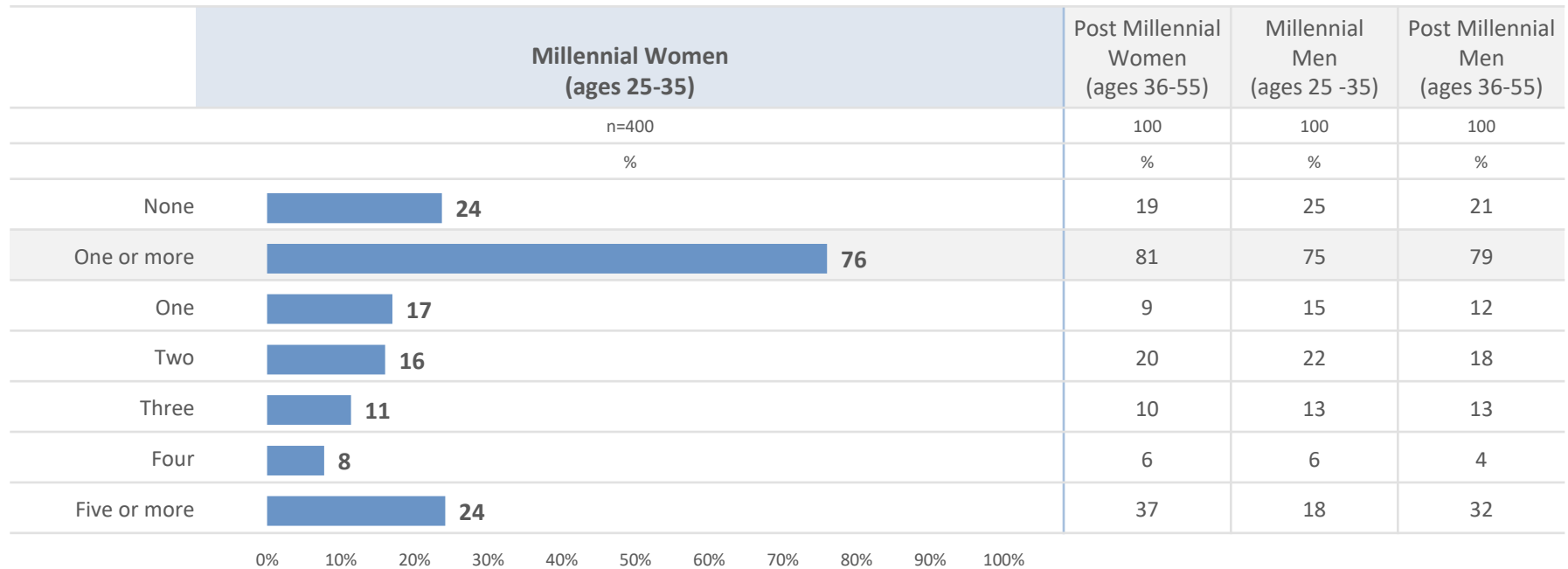
89% among those who purchase cut flowers and/or houseplants frequently (at least once every 3 months)
86% among those who report at least one parent was an 'avid' gardener
81% among those who sometimes/always had flower/plants in the home growing up
81% among those who value organically grown produce (compared to 63% among those who do not feel organic produce is important)

Q26. Have you ever bought a houseplant as a gift for someone else?

Base: Total Sample

Millennials (men and women) are less likely than post-millennials to keep potted plants in the home. Still, almost one-quarter of millennial women indicate having five or more potted houseplants.

NUMBER OF POTTED HOUSEPLANTS IN HOME



Among Millennial Women, the incidence of having one or more potted plants is greater among...

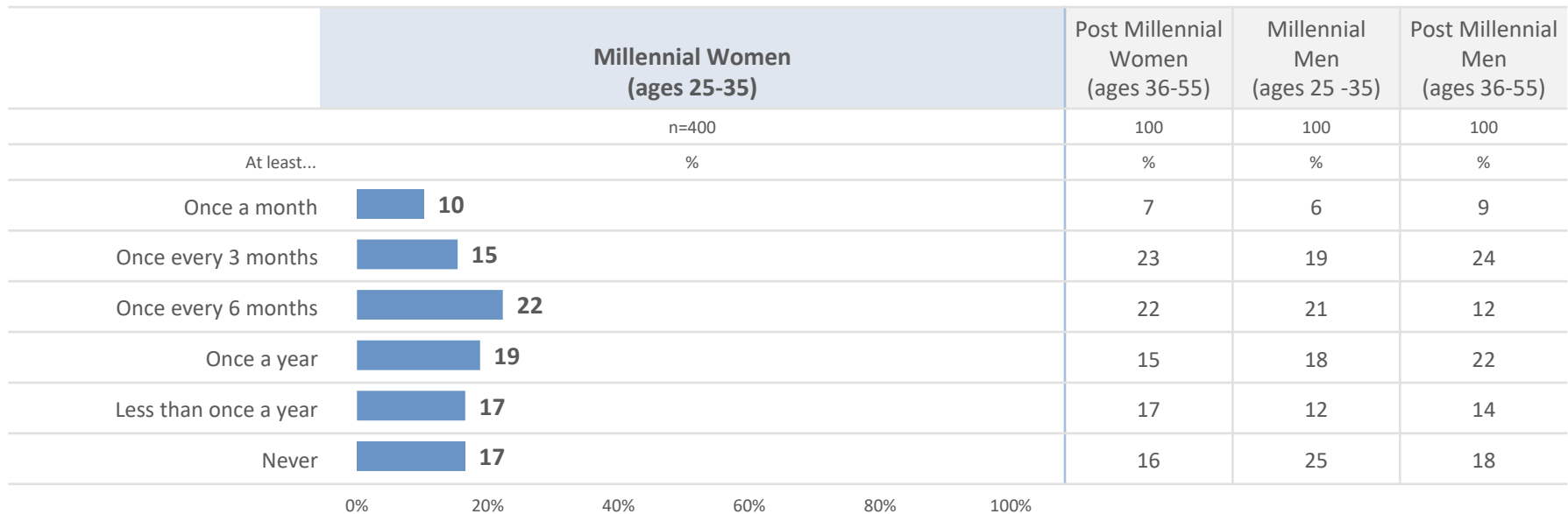
- those who sometimes/always had flower/plants in the home growing up
- those who report at least one parent was an 'avid' gardener
- those who purchase cut flowers and/or houseplants frequently (at least once every 3 months)
- those who value organically grown produce
- those who live in detached homes.

Q20. How many potted houseplants do you have in your home?

Base: Total Sample

One-quarter of millennial women purchase cut flowers at least once every 3 months. Post-millennials (men and women) report purchasing cut flowers more often than do millennials.

FREQUENCY OF PURCHASING CUT FLOWERS



Among Millennial Women, purchase frequency is greater among...

- those living alone or with a partner/spouse than those living with their parents, a roommate or someone else.
- those who sometimes/always had flowers/plants in the home growing up.
- those who report at least one parent was an 'avid' gardener
- those who believe it important to purchase organically grown produce also make these purchases on a more frequent basis.

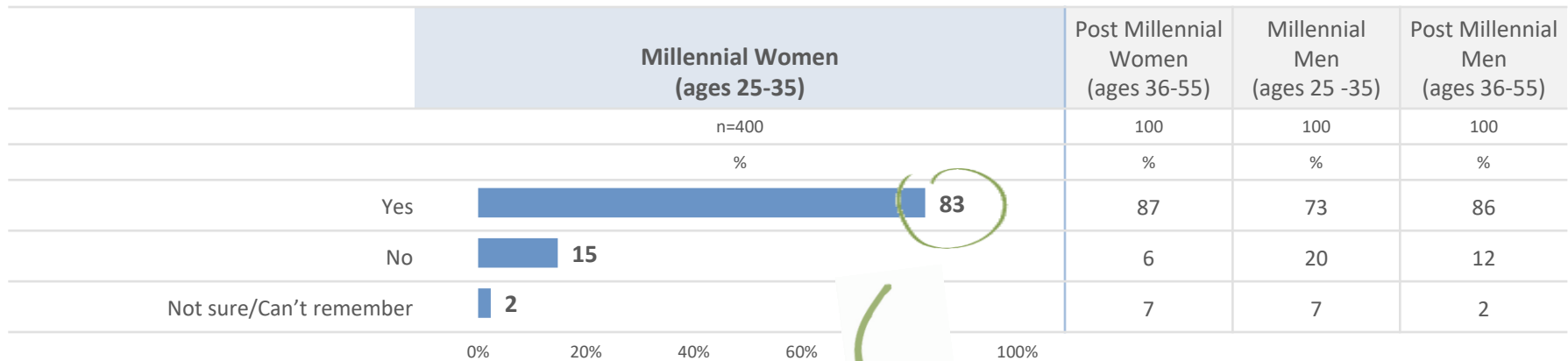
Q1. How frequently do you personally purchase the following?

Base: Total Sample

More than eight-in-ten millennial women report having brought cut flowers to the home of a friend/family member on at least one occasion.

- Reported incidence is lowest among millennial men, but it does not vary significantly across the other three age/gender cohorts.

INCIDENCE OF HAVING GIFTED CUT FLOWERS WHEN VISITING A FRIEND/FAMILY MEMBER



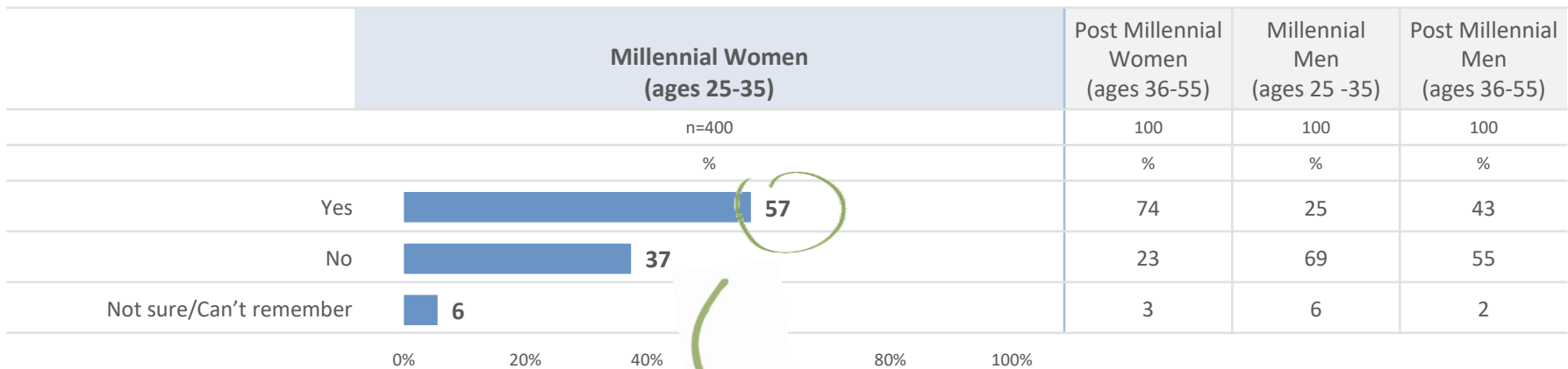
91% among those who report at least one parent was an 'avid' gardener
89% among those who sometimes/always had flower/plants in the home growing up
87% among those who value organically grown produce (versus 74% among those who do not feel it is important to buy organic)
87% among renters (compared to 79% of homeowners)

Q31. Have you ever given a friend/family member cut flowers as a gift, or brought them to a family member/friend's home, when visiting?
 Base: Total Sample

Purchasing flowers for oneself is something that is typically done by women, after the age of 35.

- Reported incidence varies significantly by segment, and is lowest among millennial men and highest among post-millennial women.
- Age is likely contributing to these differences: post-millennials have had more opportunity/years to purchase flowers for themselves.

INCIDENCE OF EVER HAVING PURCHASED CUT FLOWERS FOR SELF



64% among those who report at least one parent was an 'avid' gardener
 64% of condo/apt dwellers
 63% among those who value organically grown produce (compared to 46% of those who do not feel it is important to buy organic)
 63% of those who live alone or with a spouse (versus 38% of those who live with parent(s), a roommate or someone else)
 62% among those who sometimes/always had flower/plants in the home growing up

Q31b. Have you ever purchased cut flowers for yourself?

Base: Total Sample



OUTDOOR GARDENING

Going forward, six-in-ten millennial women plan to do at least some outdoor gardening. They are less likely than post-millennials (both men and women) to indicate an intention to do ‘a lot’ of gardening in the future.

- Post-millennial women are most likely of the segments to express interest in doing some outdoor gardening in the future.

LEVEL OF INTEREST IN GARDENING OUTDOORS, GOING FORWARD

% A lot/Some

	Millennial Women (ages 25-35) n=400	Post Millennial Women (ages 36-55)	Millennial Men (ages 25 -35)	Post Millennial Men (ages 36-55)
	%	%	%	%
TOTAL A LOT/SOME	61	72	68	59
A lot	19	27	20	29
Some	42	45	48	30
Not much	22	14	16	26
Not at all	17	14	16	15
TOTAL NOT MUCH/NOT AT ALL	39	28	32	41

Among Millennial Women intentions to garden in future are greater among...

- those who sometimes/always had flower/plants in the home growing up
- those who report at least one parent was an ‘avid’ gardener
- those who purchase cut flowers and/or houseplants frequently (at least once every 3 months),
- those living with a spouse/partner,
- home-owners and those who live in a detached or semi-detached house.

Among Millennial Women intentions to garden in future are lower among...

- those living alone,
- those living with a parent or roommate,
- those born outside of Canada
- low income earners (household income of <\$50k per year).

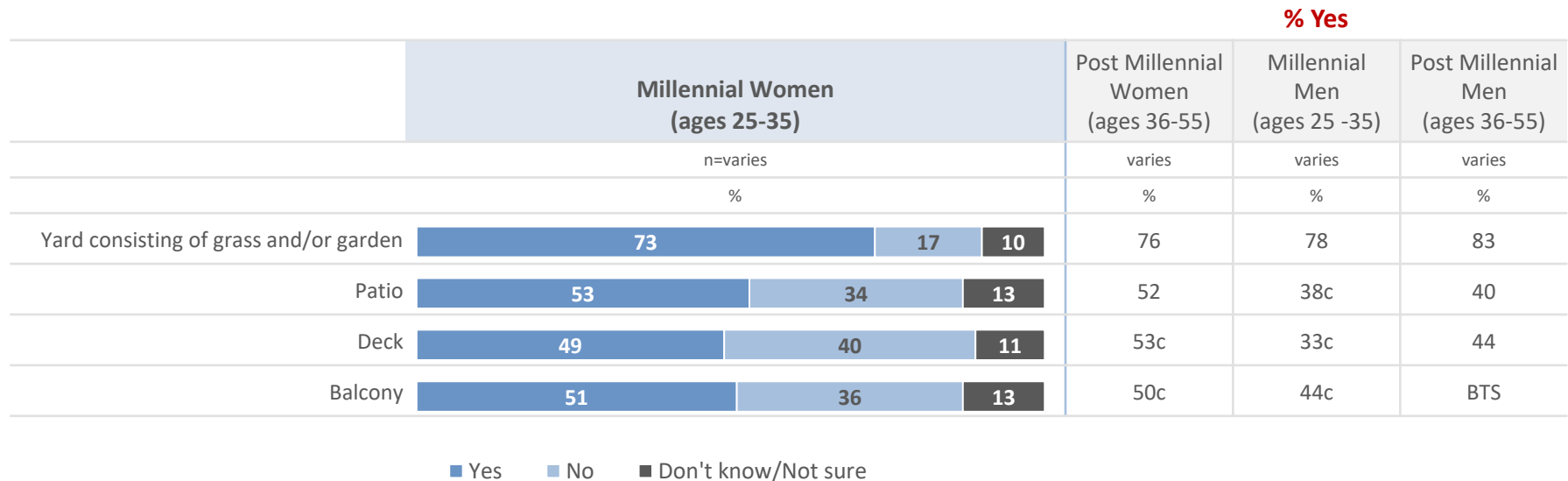
Q11b. Going forward, outside of the winter months, to what extent do you personally plan to do any outdoor gardening?

Base: Total Sample

Among millennial women, future intentions to do outdoor gardening is most common among those with a yard. Still, about half of millennial women with a patio, deck or balcony indicate an intention to grow something on it in future.

- Women are slightly more likely than men to plan on gardening on a patio or deck.

PLANS TO GROW ANYTHING IN FUTURE ON...



Q12a. Outside of the winter months, do you plan to grow anything or do any gardening on your...

Base: Those who live in a home that has the mentioned feature (base size varies) n=138 (balcony); 184 (patio); 146 (deck); 225 (yard) for millennial women

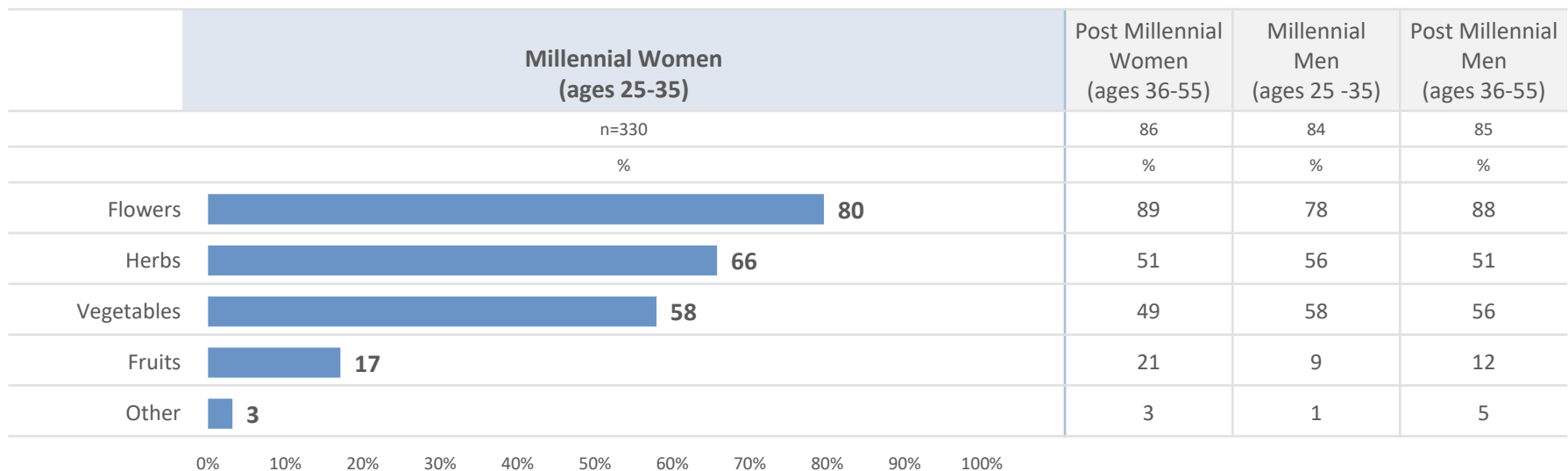
C: Caution, small base size

BTS: Base too small to report (<30)

Millennial women who plan to do at least some outdoor gardening going forward are most interested in growing flowers, although herbs and vegetables are also popular.

- Regardless of age, men are less likely than women to report an interest in growing fruit.

WHAT WILL BE GROWN IN OUTDOOR GARDENS



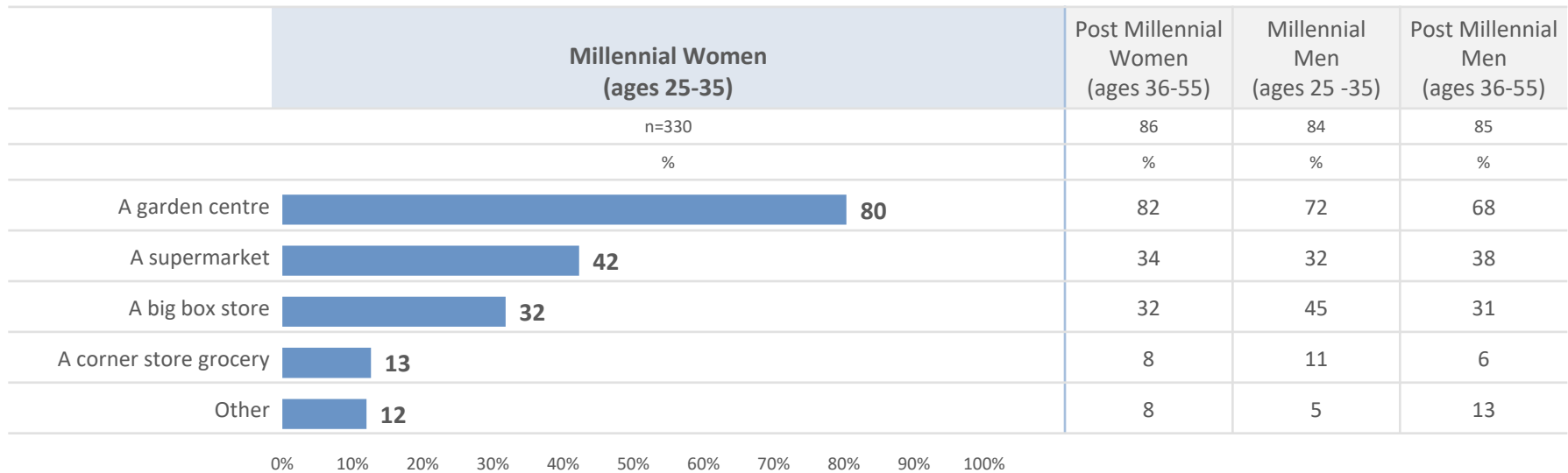
Q12. What specifically will you grow? Select all that apply.

Base: Those who intend to do at least some outdoor gardening, going forward

Among millennial women who intend to do at least some outdoor gardening, eight-in-ten plan to purchase their seeds and plants at a garden centre. Supermarkets and big box stores will be frequented to a less extent.

- Women are more likely than men to make these types of purchases at a garden centre.

WHERE SEED/PLANT PURCHASES WILL BE MADE FOR OUTDOOR GARDENS



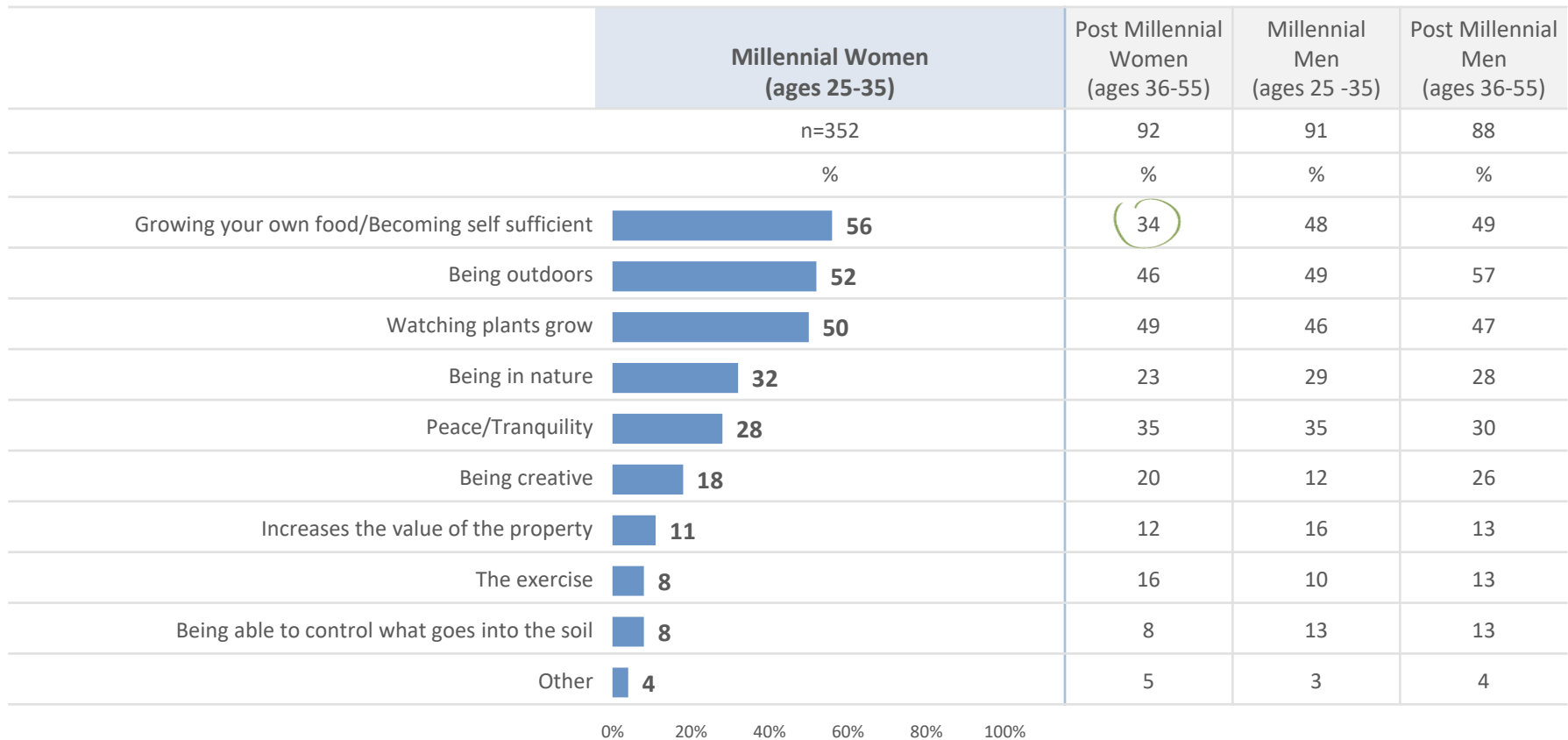
Q13. Where will you buy seeds or plants for your garden? Select all that apply.

Base: Those who intend to do at least some outdoor gardening, going forward

The three top-mentioned ‘likes’ about outdoor gardening are common across millennial women, millennial men and post-millennial men: ‘becoming self-sufficient’, ‘being outdoors’ and ‘watching plants grow’.

- A marketing message about ‘becoming self-sufficient’ will resonate less among post-millennial women, as they put less value on this benefit than do the other three age/gender cohorts.

PERCEIVED BENEFITS OF OUTDOOR GARDENING



Q15. What do you like most about gardening?

Base: Among those who have gardened in the past and/or plan to garden in the future (did not say ‘not at all’ to Q7b and Q11b)

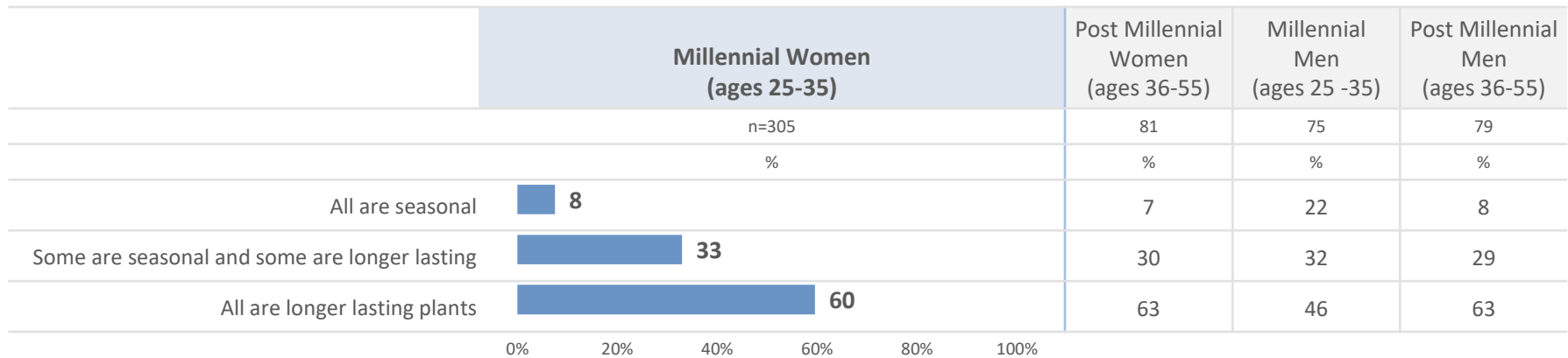


HOUSEPLANTS

The majority (60%) of millennial women keep only longer lasting plants in their homes.

- Millennial men are more likely than the other three age/gender cohorts to report that all are seasonal.

HOUSEPLANTS: SEASONAL OR LONGER-LASTING

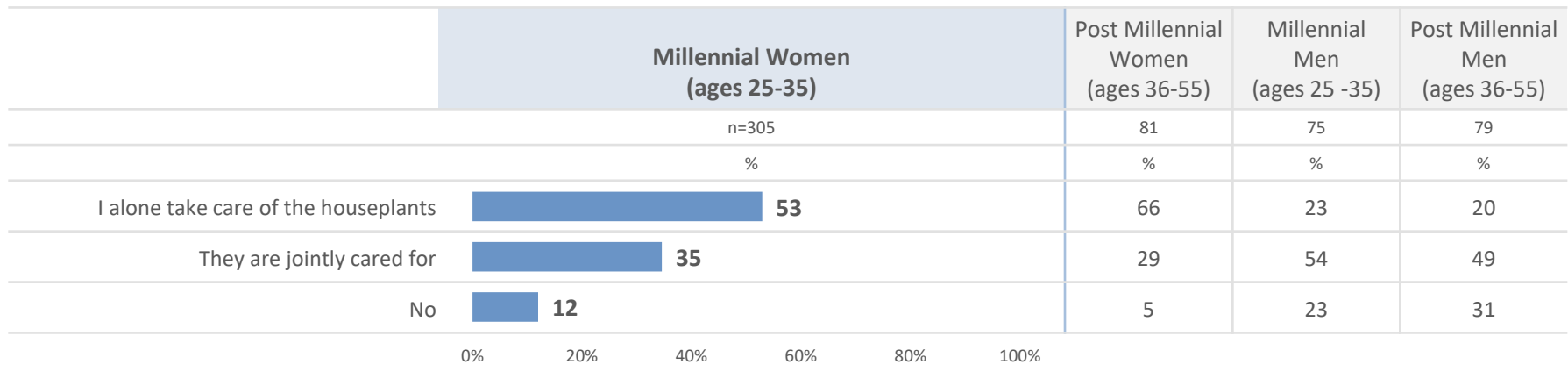


Q21. Are the plants in your home seasonal or longer-lasting? Seasonal means that they only last for a short period of time (generally, they last for a ‘season’) and then they die.

Base: Those with one or more houseplants at Q20

Regardless of age, women are more often the person in the home responsible for taking care of the houseplants. About half of millennial women report that they alone care for the plants in their home.

PERSON RESPONSIBLE FOR TAKING CARE OF HOUSEPLANTS



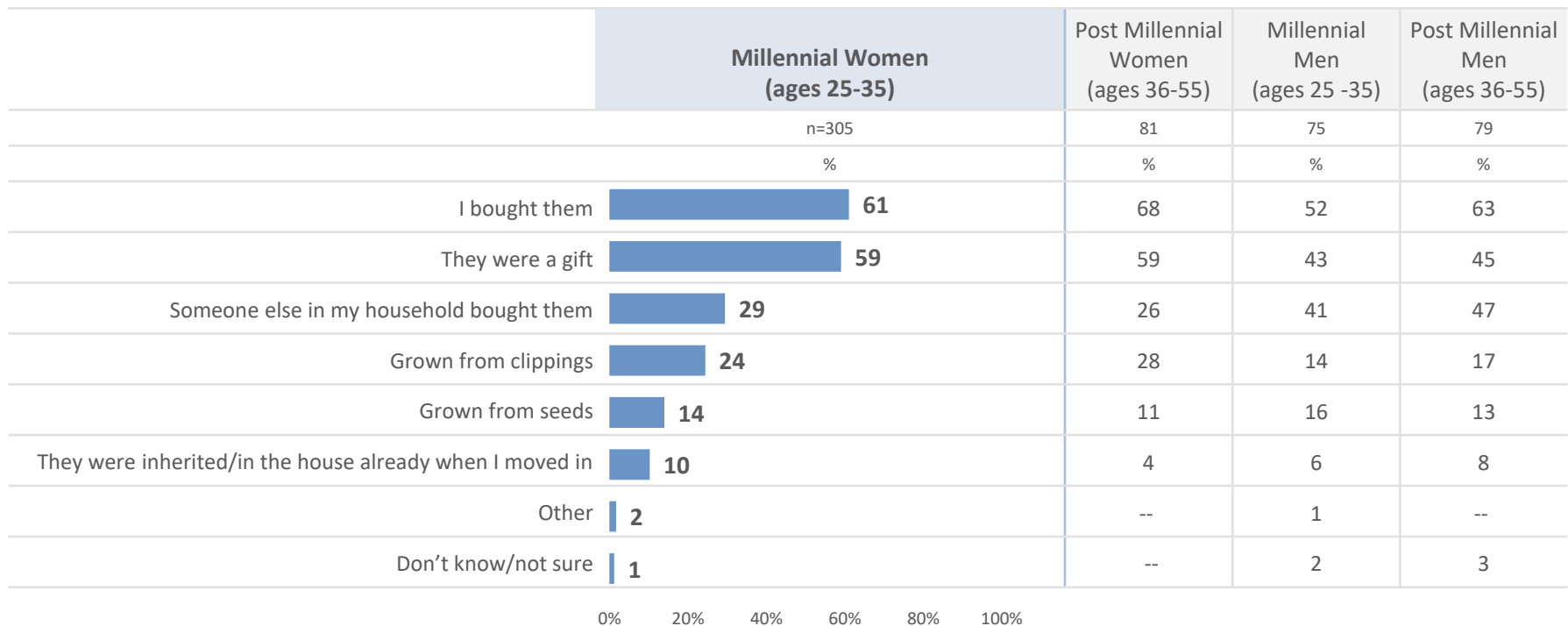
Q22. Are you the person responsible for taking care of the houseplants in your home?

Base: Those with one or more houseplants at Q20

Most often, millennial women are either buying their houseplants, or receiving them as gifts. Interestingly, 24% report having grown the plants from clipping, and 14% have grown them from seeds.

- Men are far more likely than women to indicate that ‘someone else in the household’ bought them.

HOW HOUSEPLANTS WERE OBTAINED

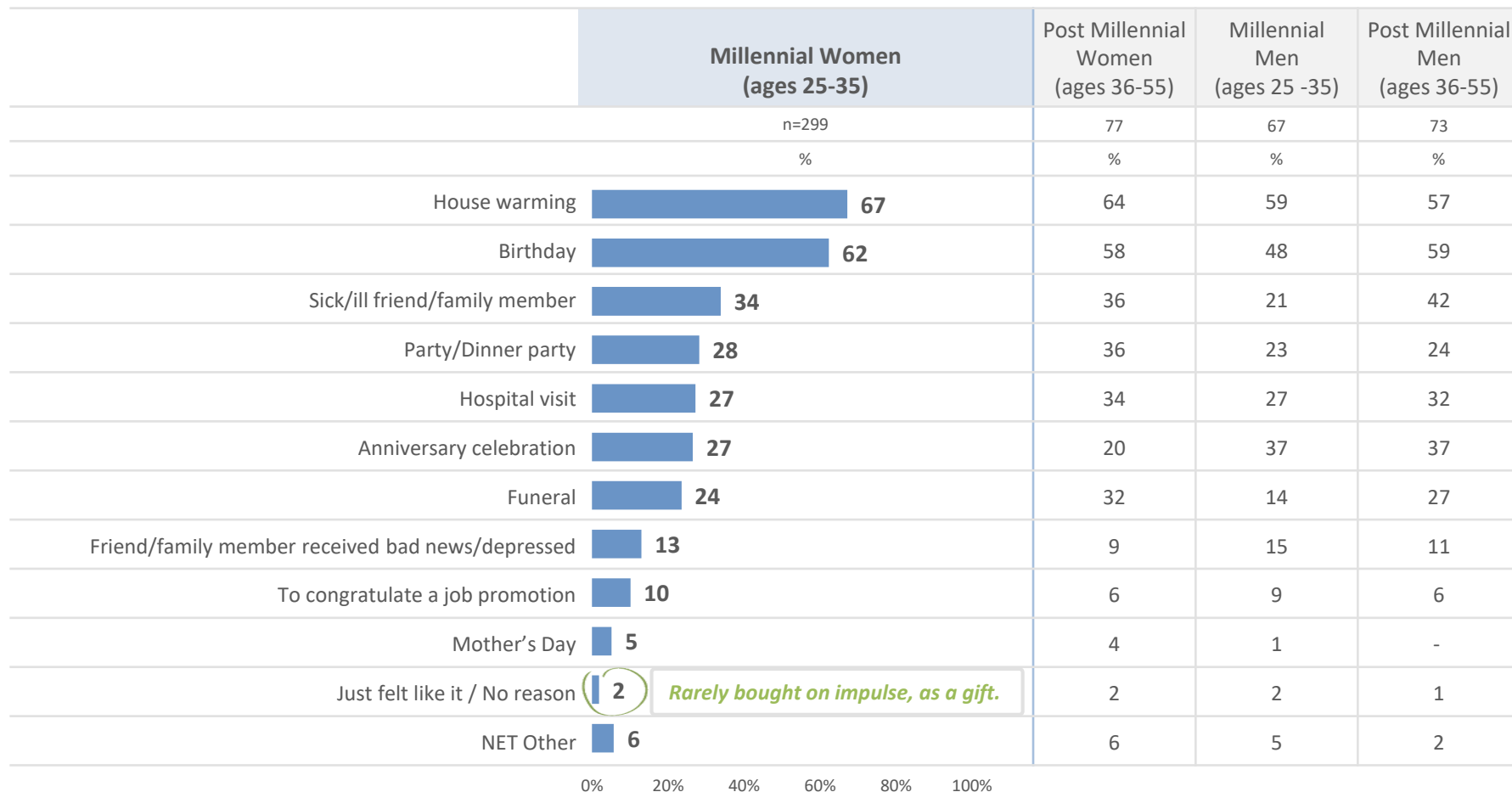


Q23. How did you obtain the houseplants in your home? (CHECK ALL THAT APPLY)

Base: Those with one or more houseplants at Q20

Consistent across all segments, the two main reasons for which houseplants have been purchased for someone are ‘birthday present’ and ‘house warming gift’.

OCCASIONS FOR WHICH HOUSEPLANTS HAVE BEEN GIFTED (UNAIDED)

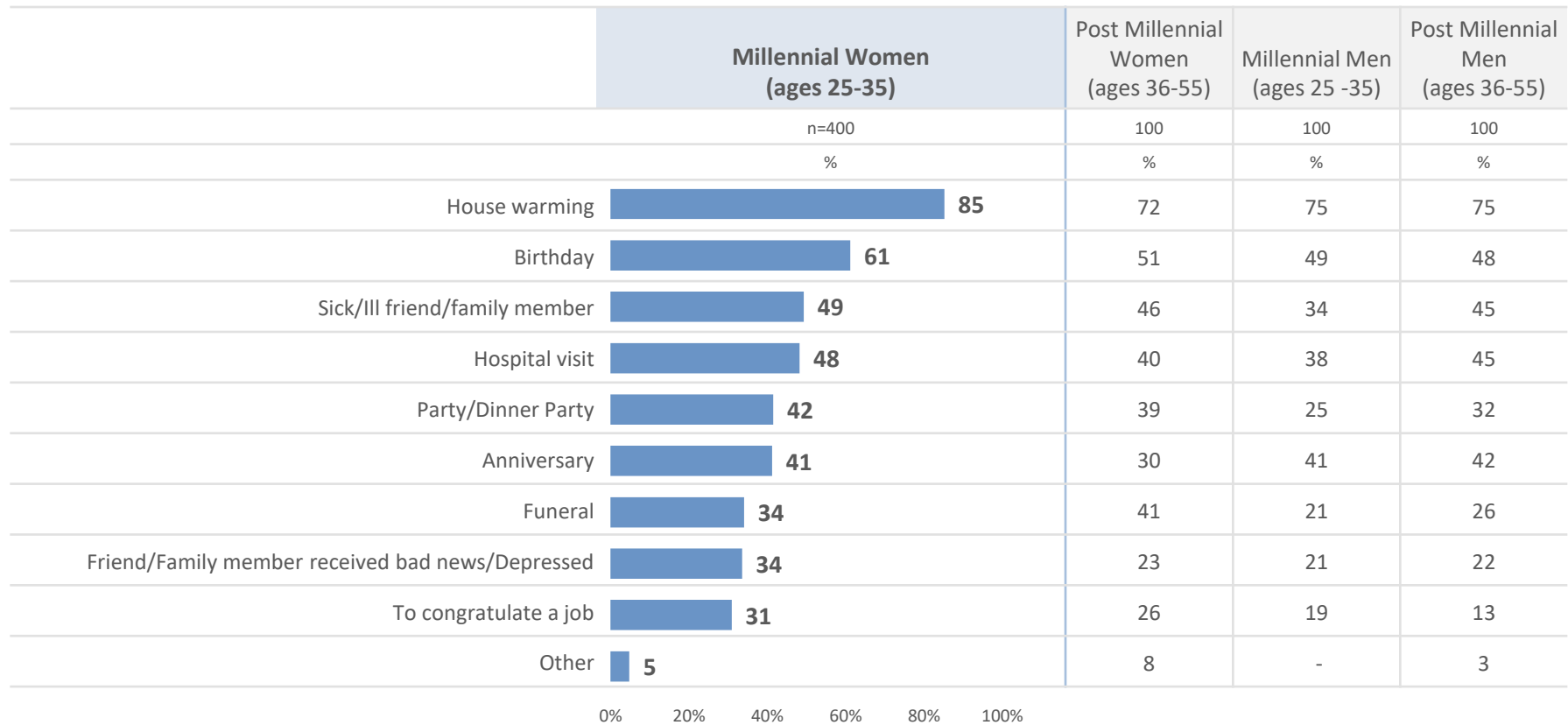


Q27. On what occasion(s) have you bought a houseplant for someone else? (CHECK ALL THAT APPLY)

Base: Those who have purchased houseplants for someone else at Q26

All four gender/age cohorts cite similar occasions for which they might consider purchasing houseplants for someone else, the top two reasons being as a ‘housewarming gift’ and for a ‘birthday’. Importantly, for many occasions, millennial women are more likely than the other three cohorts to indicate a likelihood to gift houseplants.

OCCASIONS FOR WHICH HOUSEPLANTS WOULD BE PURCHASED FOR SOMEONE (UNAIDED)



Q27b. On what occasion(s) would you buy a houseplant for someone else? (CHECK ALL THAT APPLY)

Base: Total Sample

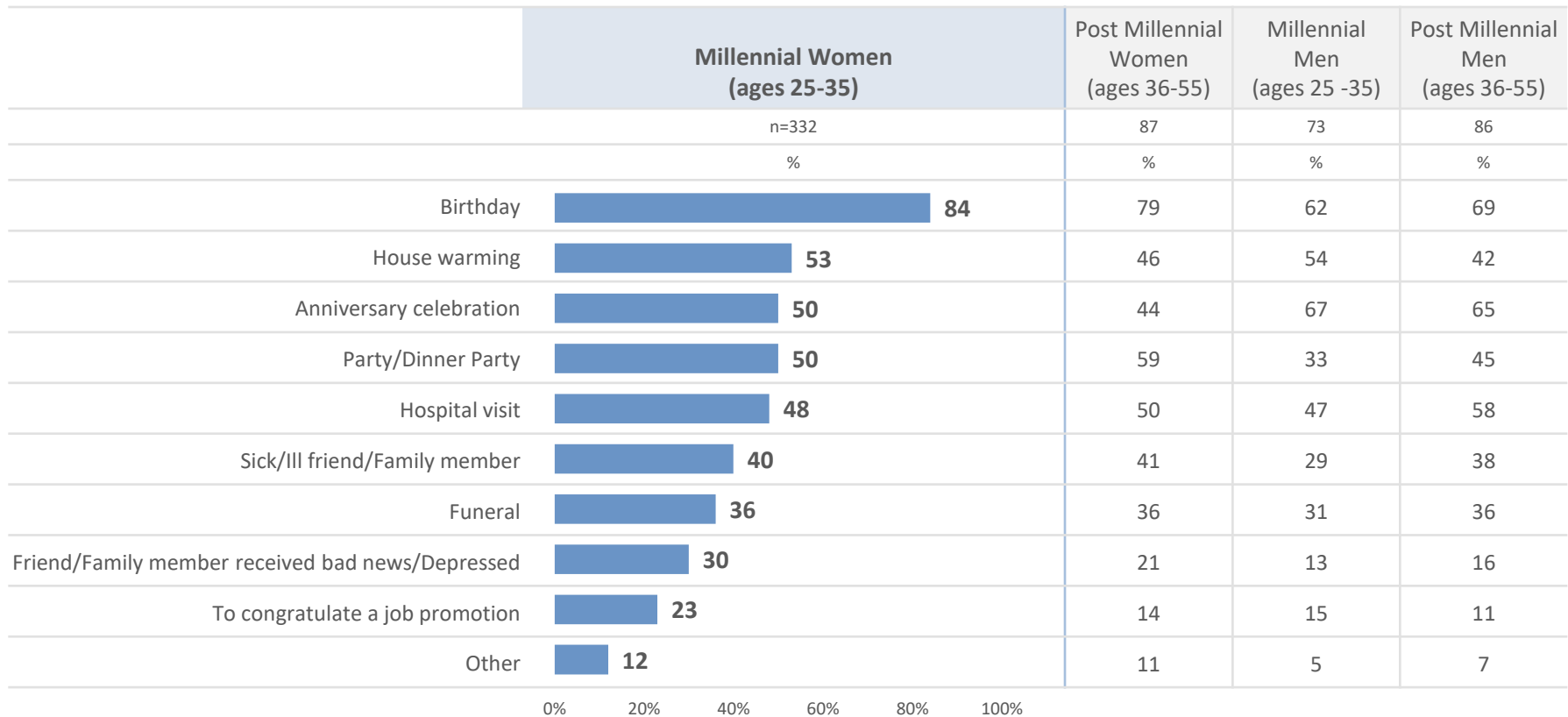


CUT FLOWERS

Among millennial women, flowers are most often purchased for someone as a birthday gift. Other common occasions include housewarming, anniversary celebrations and dinner parties.

- Men are more likely than women to give flowers in celebration of an anniversary.

OCCASIONS FOR WHICH FLOWERS HAVE BEEN GIFTED/BROUGHT TO SOMEONE

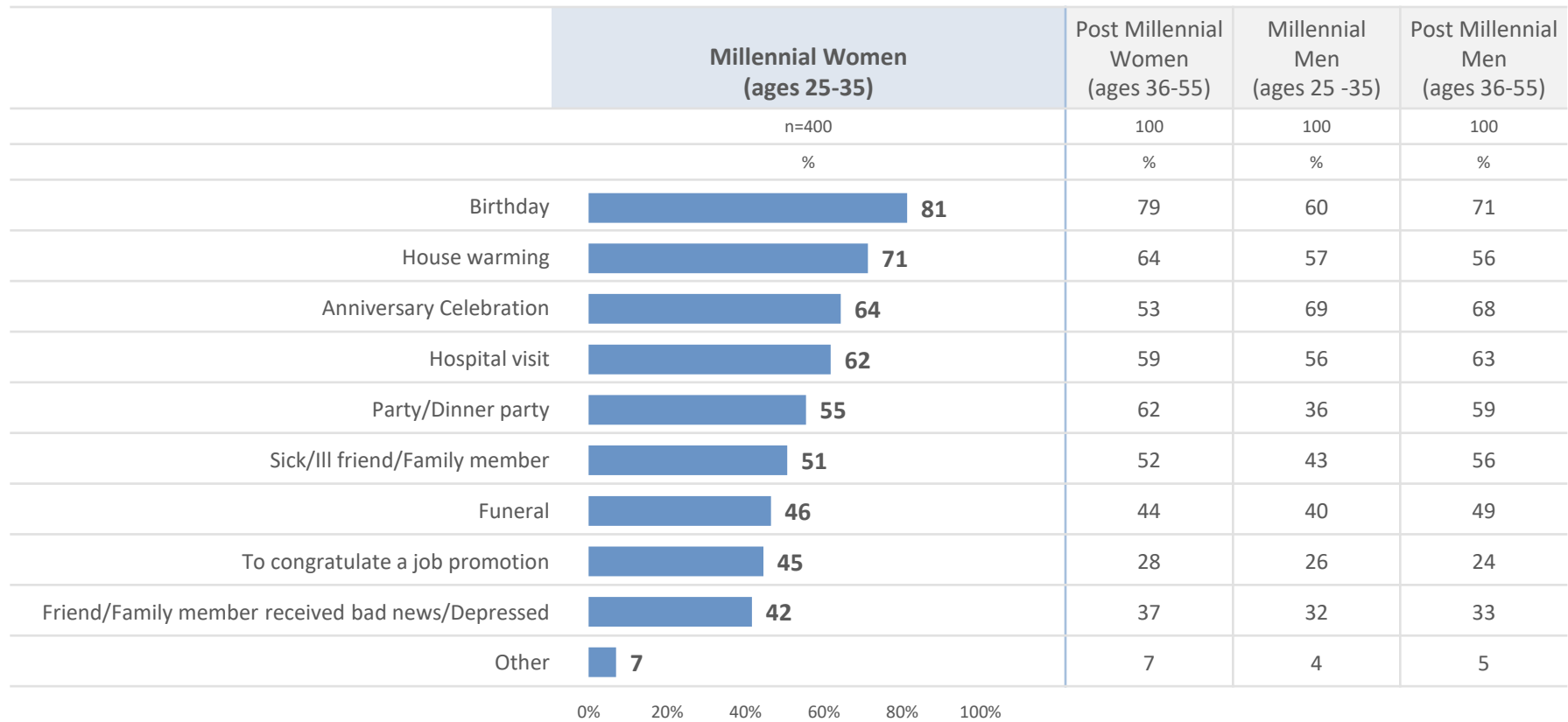


Q32. On what kind of occasion(s) have you gifted or brought flowers to someone?

Base: Those who have ever bought flowers for someone else at Q31

Regardless of past purchase behaviour, high proportions of millennial women indicate that there are many occasions for which they would purchase flowers for someone as a gift. Importantly, for many occasions, millennial women are more likely than the other three cohorts to indicate a likelihood to gift flowers.

OCCASIONS FOR WHICH FLOWERS WOULD BE GIFTED/BROUGHT TO SOMEONE

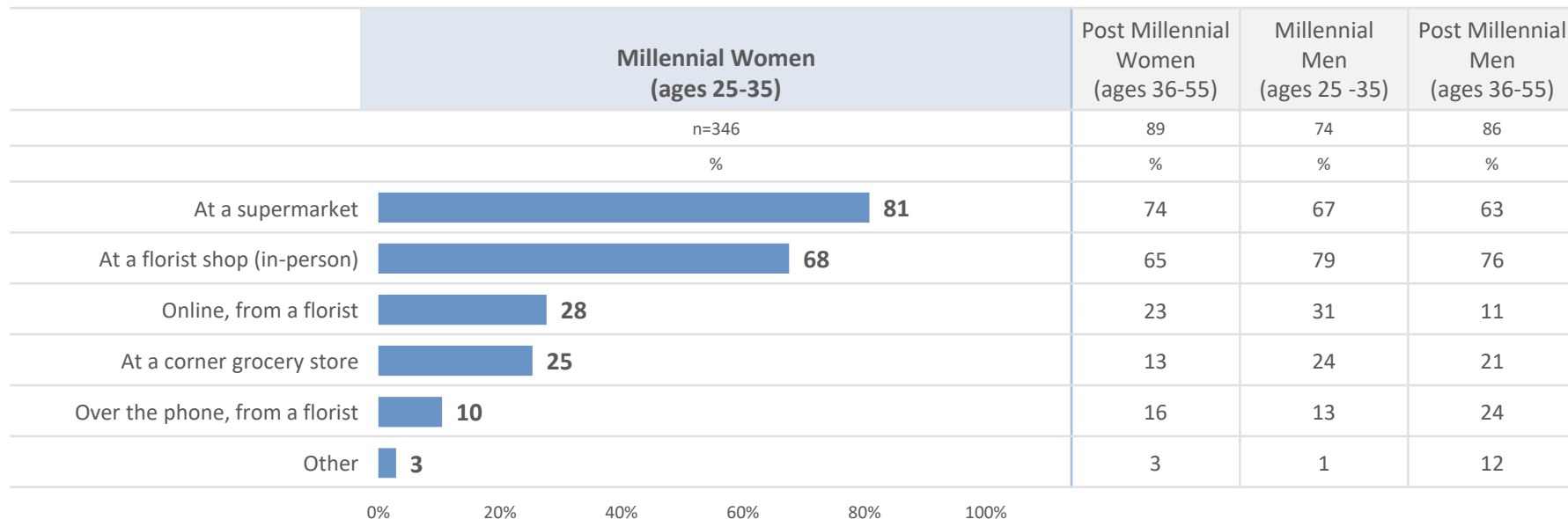


Q32b. What kinds of occasions would you gift or bring flowers to someone? SELECT ALL THAT APPLY.

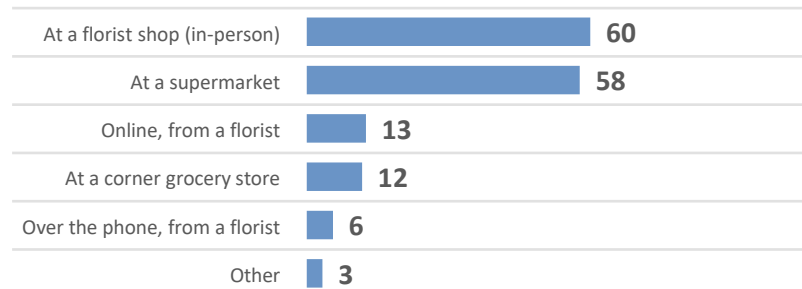
Base: Total Sample

Eight-in-ten millennial women (81%) who have purchased flowers indicate that they usually buy them at a supermarket. Those who have never purchased flowers appear to underestimate the likelihood of making the purchase at a supermarket (58%).

WHERE FLOWERS WOULD NORMALLY BE PURCHASED



WHERE FLOWERS WOULD BE PURCHASED AMONG MILLENNIAL WOMEN WHO HAVE NEVER PURCHASED FLOWERS (n=54):



Q33. Where would you normally buy flowers?

Base: Among those who have ever purchase flowers (for others and/or self)

Q33b. If you were going to buy flowers, where would you likely purchase them?

Base: Among those who have never purchased flowers (for self and/or others)

People are inclined to spend much less on flowers when purchasing them for themselves than when purchasing them as a gift. Millennial women will spend less on themselves when purchasing flowers, in comparison to the other three segments.

- Men spend more on themselves and others than women.

AVERAGE AMOUNT SPENT ON FLOWERS WHEN PURCHASED FOR SELF AND AS A GIFT

	FOR SELF				FOR SOMEONE ELSE			
	Millennial Women (ages 25-35)	Post Millennial Women (ages 36-55)	Millennial Men (ages 25 -35)	Post Millennial Men (ages 36-55)	Millennial Women (age 25-35)	Post Millennial Women (ages 36-55)	Millennial Men (ages 25 -35)	Post Millennial Men (ages 36-55)
	n=228	75	25c	43c	332	87	73	86
	%	%	%	%	%	%	%	%
Under \$10	28	20	22	8	5	1	4	2
\$10 to \$19.99	54	63	30	61	32	38	30	30
\$20 to \$29.99	13	12	21	22	36	33	39	35
\$30 to \$39.99	6	2	14	3	15	17	11	19
\$40 to \$49.99	--	2	13	--	6	9	11	6
\$50 or more	--	--	--	6	6	3	6	7

Q34. On average, how much do you spend on flowers when you purchase them for yourself?

Base: Those who have ever purchased flowers for themselves

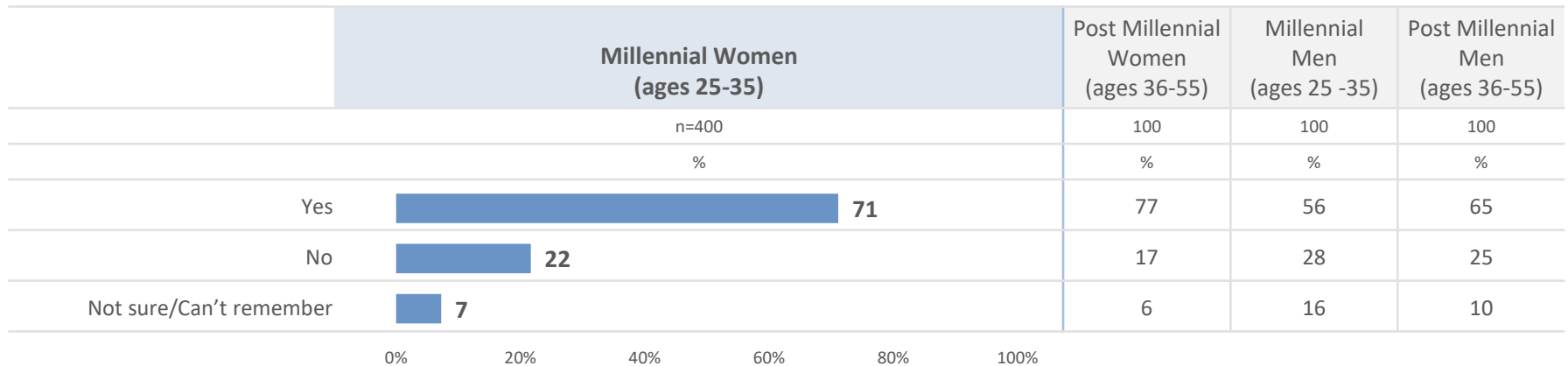
C: Caution, small base size

Q35. On average, how much do you spend on flowers when you purchase them as a gift?

Base: Those who have purchased flowers as a gift

Seven-in-ten millennial women suggest that visitors have in the past brought cut flowers to their home. Reported incidence is higher among women than men.

INCIDENCE OF RECEIVING FLOWERS FOR HOME, FROM PEOPLE VISITING



Among Millennial Women, incidence of receiving flowers is high among...

- those who sometimes/always had flower/plants in the home growing up
- those who report at least one parent was an 'avid' gardener
- those who purchase cut flowers and/or houseplants frequently (at least once every 3 months)
- those who value organically grown produce
- those who earn >\$50k per year in household income

Q30. Have people visiting you ever brought cut flowers for your home?

Base: Total Sample



GIFTING CUT FLOWERS AND HOUSEPLANTS

Among millennial women, cut flowers and houseplants are just as likely, if not more likely to be gifted as beer, chocolates or gift cards.

- While cut flowers and houseplants are less likely to be gifted than wine, it should be noted that millennial women are far more likely to recall past-month advertising of wine (72% do) than they are able to recall seeing ads about cut flowers (40%) or houseplants (31%) within the past month.
- Among millennial women, cut flowers are slightly more likely to be gifted than houseplants.

LIKELIHOOD TO GIVE VARIOUS ITEMS AS GIFTS

	Millennial Women (ages 25-35) n=400				% Very/ Somewhat likely
	%				%
Cut flowers	26	48	17	8	74
Houseplant	15	50	25	10	65
Wine	67	22	6	5	89
Beer	32	31	20	17	63
Chocolates	24	38	25	13	62
Gift card	18	28	26	28	46

- Very likely
- Somewhat likely
- Not too likely
- Not at all likely

The propensity to give flowers/houseplants as a gift is greater among those who value organically grown food products, those with a parent who 'avidly' gardened, and those who always/sometimes had flowers/plants in the home growing up.

Likelihood to gift cut flowers is greater among:

- Those born outside of Canada compared to those born in Canada
- Renters (versus homeowners)
- Those who do not live in a condo/apartment
- Those who live alone

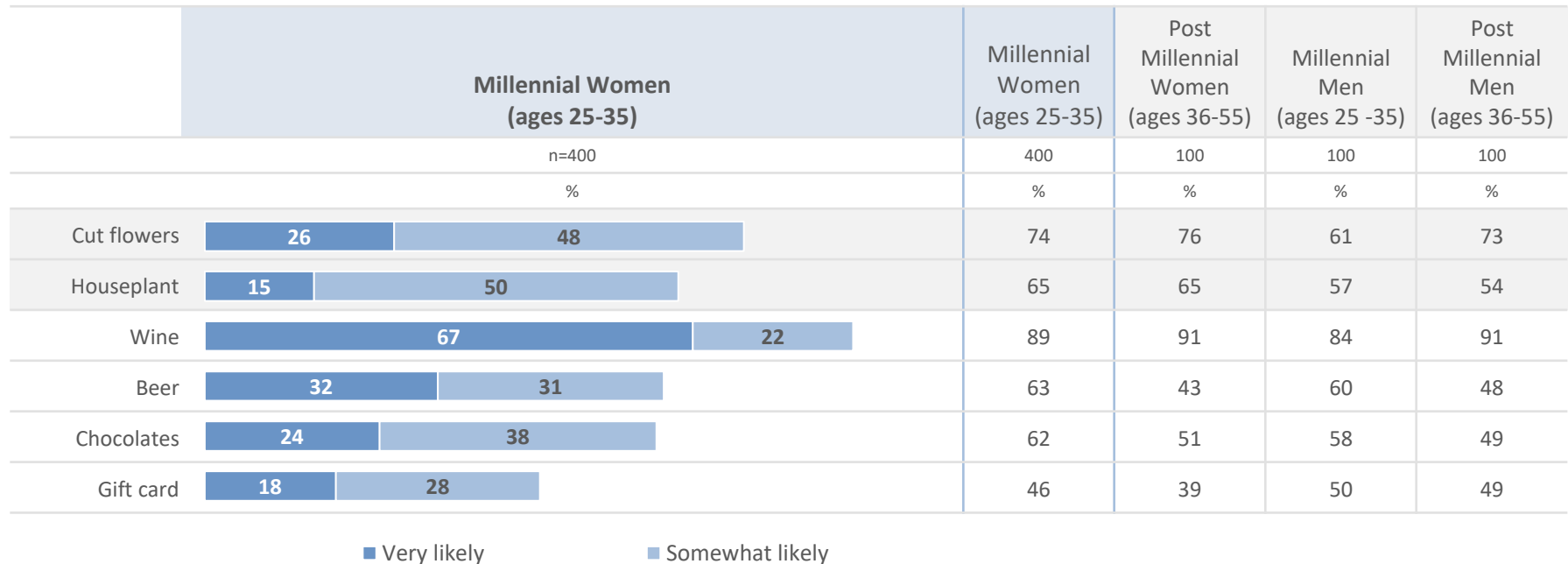
Q42. How likely are you to give each of the following as a gift when visiting a friend's home?

Base: Total Sample

Women are more inclined than men to gift a houseplant when visiting a friend’s home. Millennial men are least likely of the four age/gender cohorts to gift cut flowers.

LIKELIHOOD TO GIVE VARIOUS ITEMS AS GIFTS

% Very/Somewhat likely



Q42. How likely are you to give each of the following as a gift when visiting a friend’s home?

Base: Total Sample

Millennial women believe that their friends would appreciate a gift of wine more so than any of the other items presented. Cut flowers rank second only to wine in terms of an overall ‘appreciative’ score (91% feel that their friends would very/somewhat appreciate this gift). Of the items listed, houseplants are least likely to receive a top box score of ‘very appreciative’.

PERCEPTIONS REGARDING HOW APPRECIATIVE FRIENDS WOULD BE OF VARIOUS GIFTS

	Millennial Women (ages 25-35)				% Very/ Somewhat appreciative
	n=400				400
	%				%
Cut flowers	51	40	8	1	91
Houseplant	31	50	15	3	81
Wine	71	24	3	2	95
Beer	55	30	9	7	85
Gift card	52	37	9	2	89
Chocolates	45	43	10	2	88

■ Very appreciative
 ■ Somewhat appreciative
 ■ Not too appreciative
 ■ Not at all appreciative

- Millennial women who purchase cut flowers and/or houseplants at least once every 3 months are more likely than less frequent purchasers to feel that their friends would be appreciative of these gifts.
- Those who live with their parents, a roommate or someone else are less likely than average to believe their friends would appreciate a gift of cut flowers or houseplants.

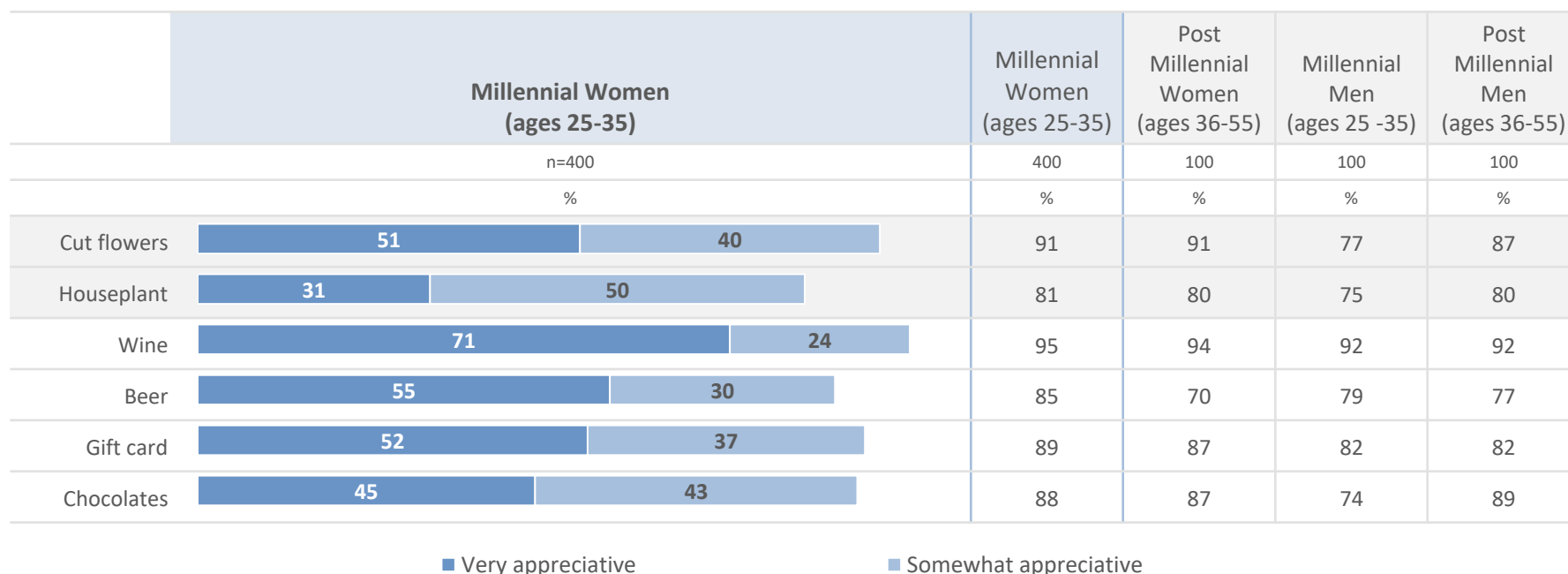
Q43. How appreciative do you imagine a typical friend of yours would be with each type of gift?

Base: Total Sample

Millennial men are least likely of the four age/gender cohorts to believe their friends would appreciate receiving cut flowers or houseplants as gifts.

PERCEPTIONS REGARDING HOW APPRECIATIVE FRIENDS WOULD BE OF VARIOUS GIFTS

% Very/Somewhat appreciative

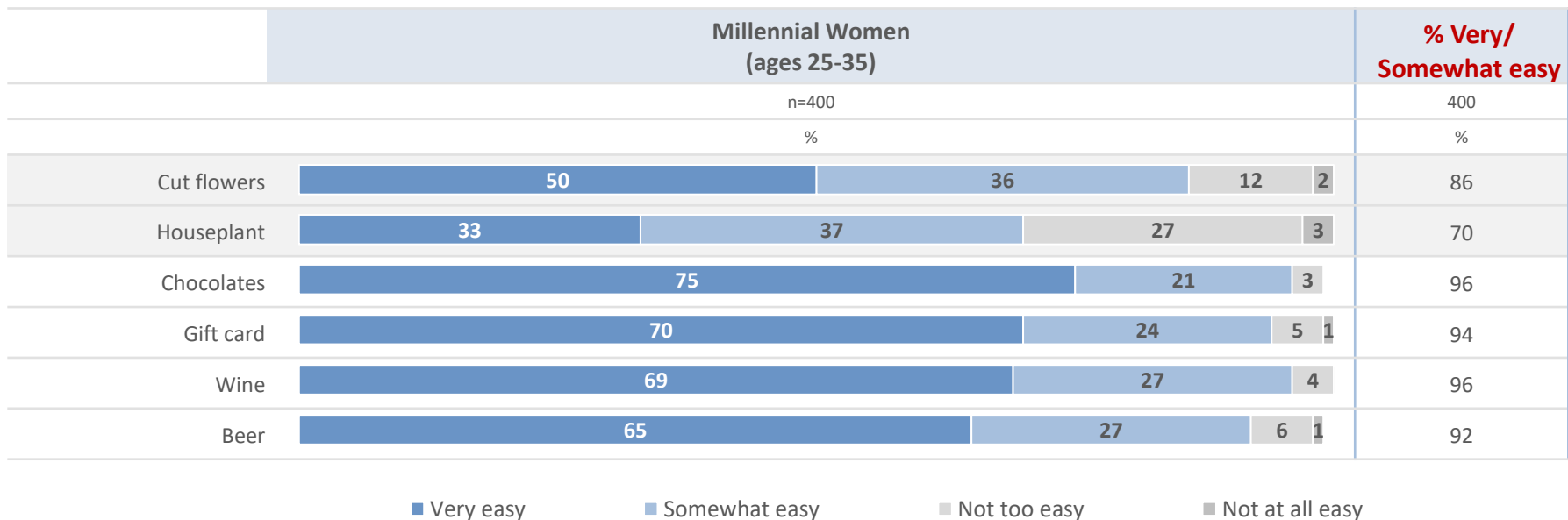


Q43. How appreciative do you imagine a typical friend of yours would be with each type of gift?

Base: Total Sample

Other items (chocolates, wine, beer and gift cards) are viewed to be easier to purchase as gifts than either cut flowers or houseplants. Cut flowers are perceived to be somewhat easier to gift than houseplants. Still, at least seven-in-ten believe that both cut flower and houseplants are at least ‘somewhat’ easy to gift.

PERCEPTIONS REGARDING EASE OF PURCHASING CERTAIN ITEMS AS GIFTS



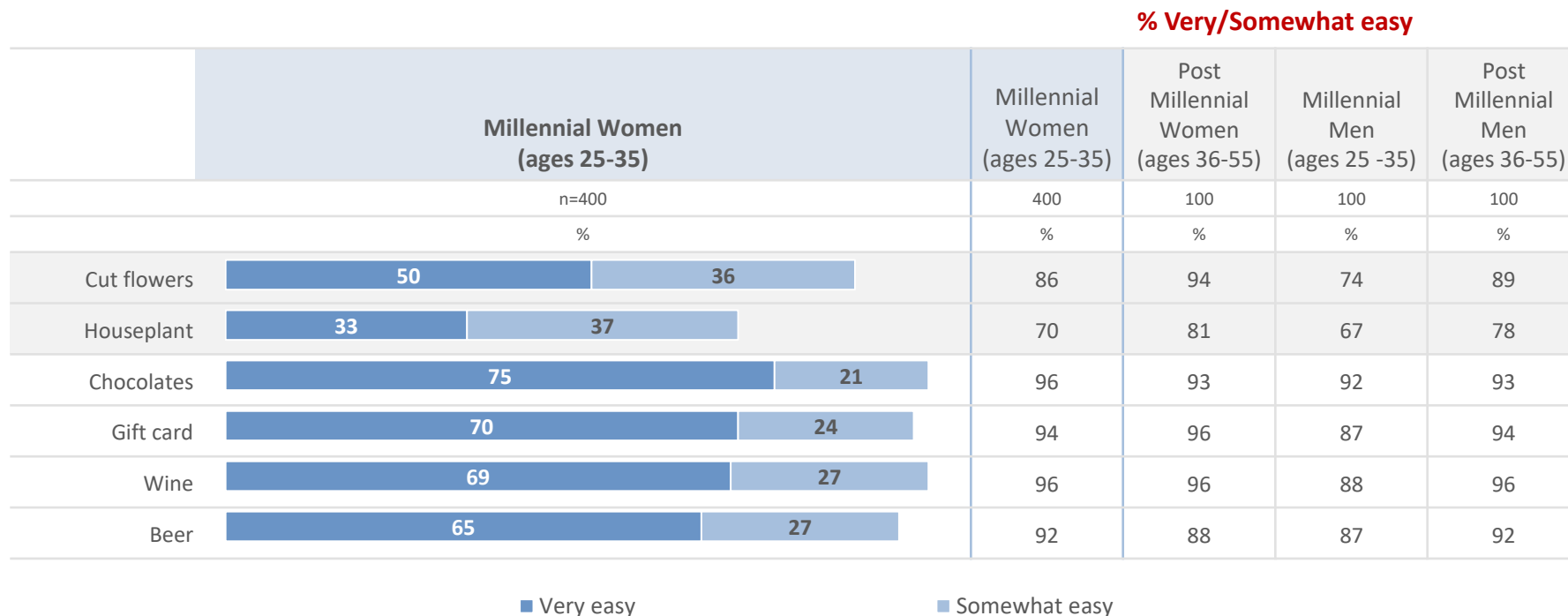
- Millennial women who purchase cut flowers and/or houseplants at least once every 3 months are more likely than less frequent purchasers to feel that it is easy to give someone a gift of cut flowers or houseplants .
- Those who value organic food products and those who grew up with flowers/plants always/sometimes in the home are more inclined to believe it to be easy to gift houseplants and flowers.
- Specifically with respect to gifting cut flowers, higher income earners are more likely than low income earners (<\$50k/year) to believe it is easy.
- Those who live with their parents, a roommate or someone else are less likely than average to believe it is easy to gift houseplants.

Q44. How easy is it to purchase each of the following as a gift when visiting a friend’s home?

Base: Total Sample

Millennials (women and men) are less likely than post-millennials to believe that gifting houseplants is ‘easy’. Millennial men are less likely than the other three age/gender cohorts to feel it is ‘easy’ to gift cut flowers.

PERCEPTIONS REGARDING EASE OF PURCHASING CERTAIN ITEMS AS GIFTS



Q44. How easy is it to purchase each of the following as a gift when visiting a friend’s home?

Base: Total Sample

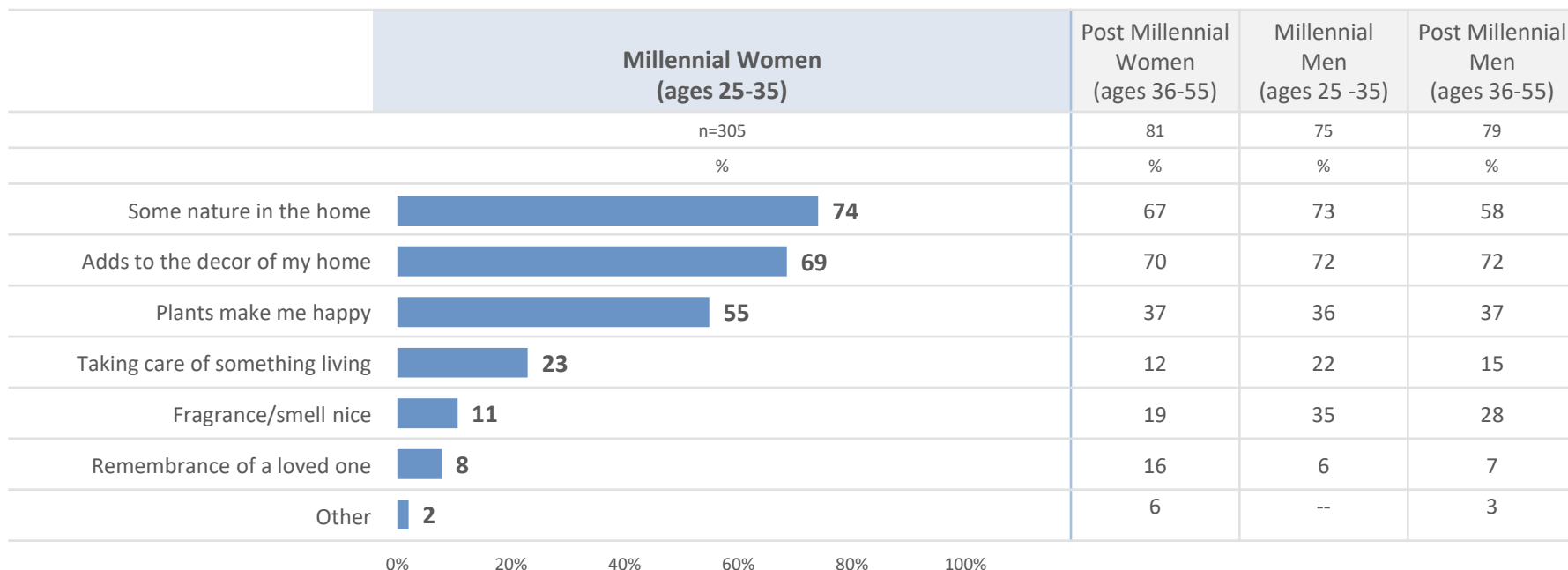


PERCEPTIONS AND ATTITUDES ABOUT CUT FLOWERS AND HOUSEPLANTS

Millennial women are substantially more likely than the other three age/gender cohorts to select ‘plants make me happy’ as what they like most about houseplants.

- Across all four age/gender cohorts, those with houseplants like most the benefit of having some nature in the home, as well as the believe that houseplants add to the interior decor.

LIKE MOST ABOUT HOUSEPLANTS

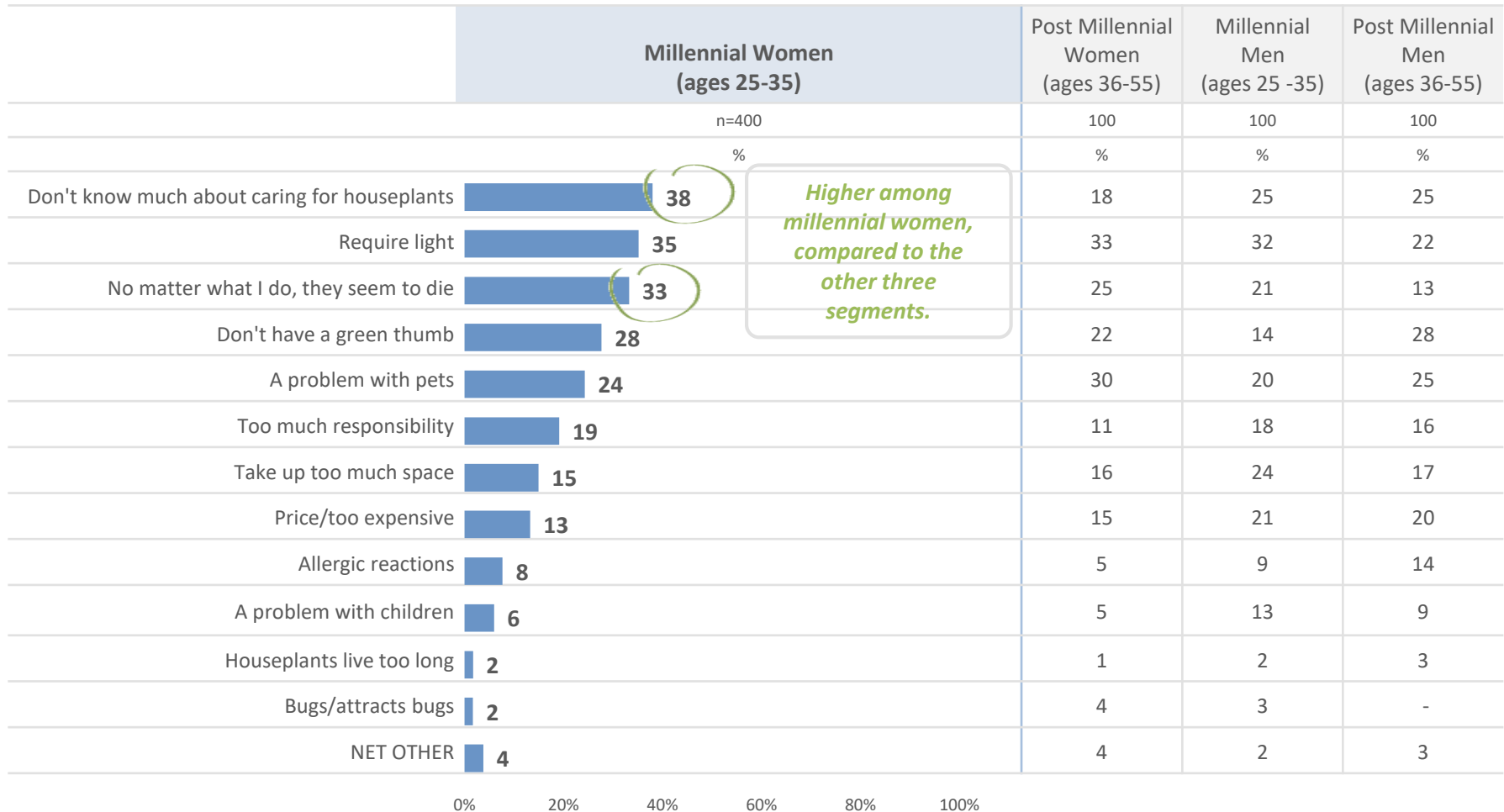


Q24. What do you like most about having houseplants? (SELECT UP TO 3 RESPONSES)

Base: Those with one or more houseplants at Q20

Millennial women suggest that the biggest barriers to having houseplants are a lack of knowledge about them, that ‘no matter what, they seem to die’ and that they require too much light.

BARRIERS TO HAVING HOUSEPLANTS

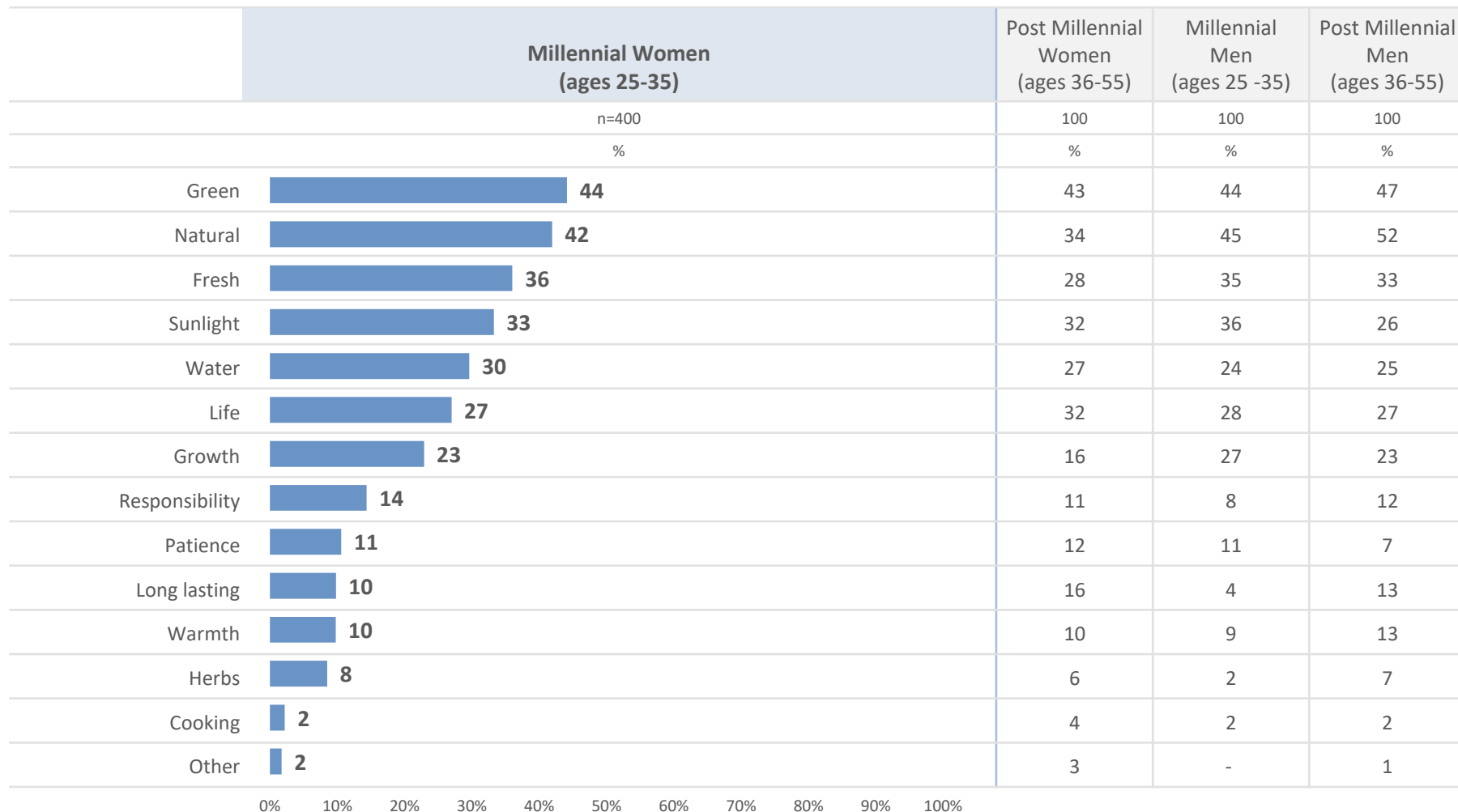


Q25. What do you see as barriers or drawbacks to having houseplants? (SELECT UP TO 3 RESPONSES)

Base: Total Sample

Millennial women most associate houseplants with words such as ‘green’, ‘natural’, ‘fresh’ and ‘sunlight’.

WORDS ASSOCIATED MOST WITH HOUSEPLANTS

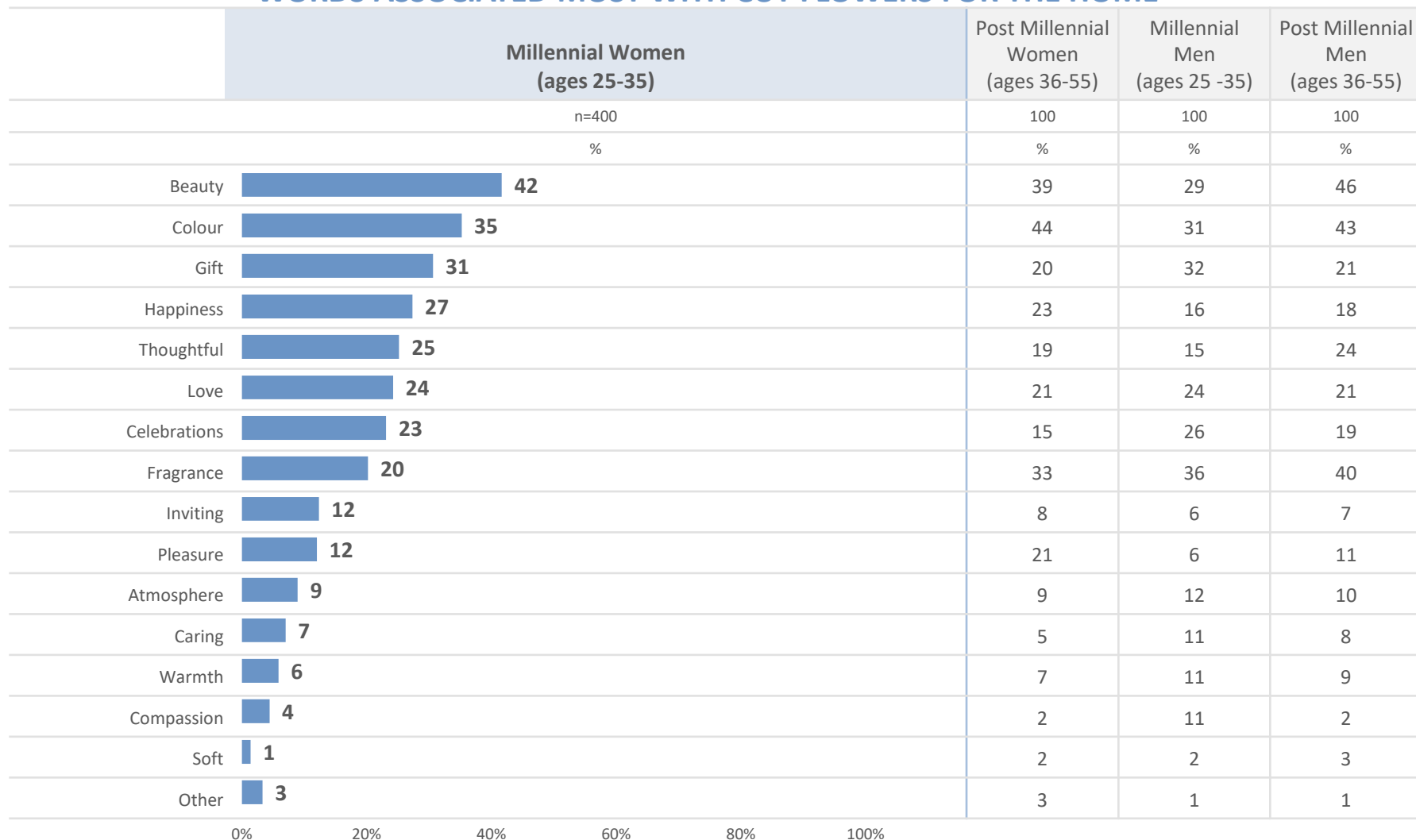


Q28. What three words or phrases do you most associate with houseplants?

Base: Total Sample

Millennial women most associate cut flowers with words such as ‘beauty’, ‘colour’ and ‘gift’.

WORDS ASSOCIATED MOST WITH CUT FLOWERS FOR THE HOME



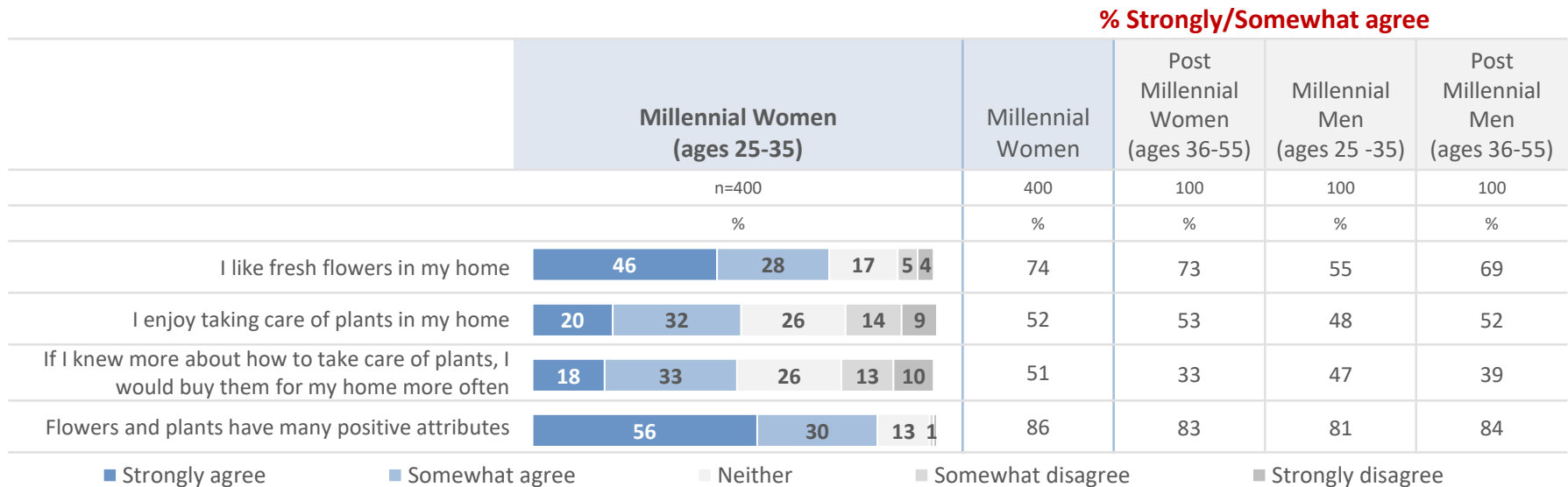
Q29. What three words or phrases do you most associate with cut flowers for the home?

Base: Total Sample

While a high proportion of millennial women believe that houseplants have many positive attributes, they are less inclined to enjoy taking care of houseplants.

- Millennial men are less likely than the other three gender/age cohorts to like fresh flowers.
- Millennial men and women are more likely than the older age cohorts to admit that they would buy plants more often if they knew how to care for them.

LEVEL OF AGREEMENT WITH VARIOUS POSITIVE ATTITUDINAL STATEMENTS



Among Millennial Women, level of agreement is generally higher for all four statements among...

- Those who value organically grown produce
- Frequent purchasers of cut flowers and/or plants

Those who grew up with flowers/plants in the home and those with at least one parent who 'avidly' gardens are more likely to 'like fresh flowers' and to 'enjoy taking care of houseplants'.

Condo/apt dwellers are more likely to agree that flowers/plants have many positive attributes, and that they would buy more if they knew how to care for them.

Q36. This question asks you to consider various statements - some are about houseplants and some are about cut flowers. Please indicate the extent to which you agree or disagree with each of the following statements.

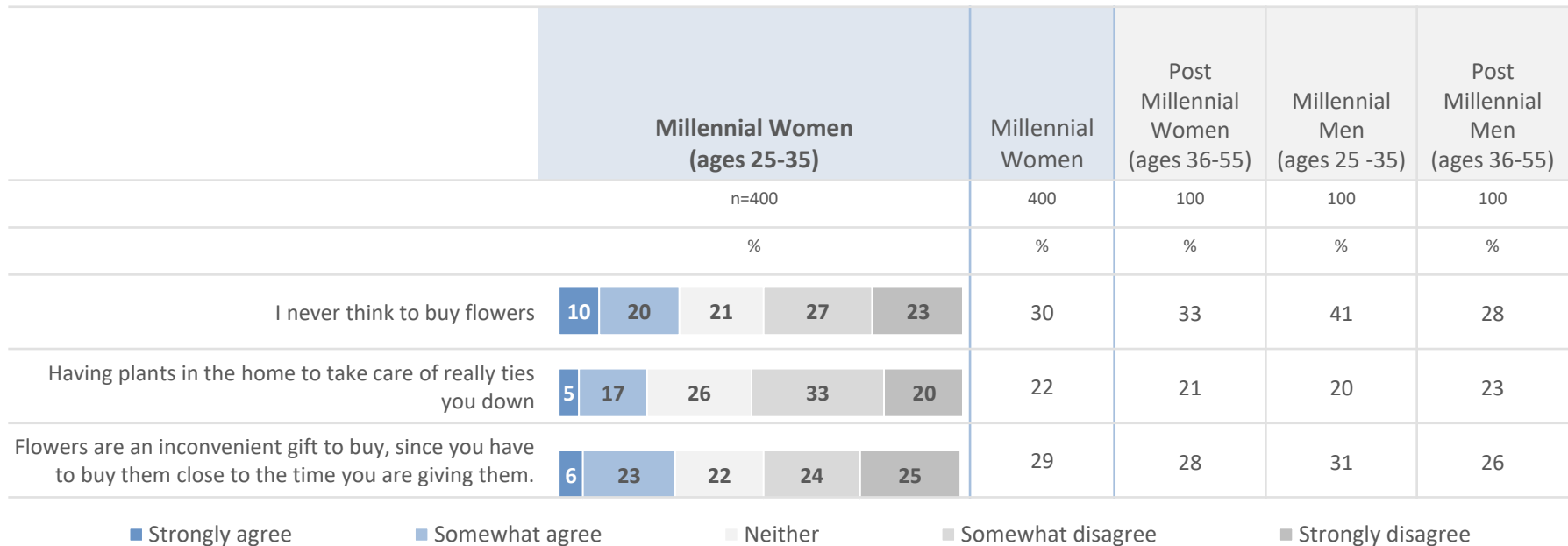
Base: Total Sample

About three-in-ten millennial women ‘never think to buy flowers’ and believe that flowers are an inconvenient gift to buy. A smaller proportion agree that having plants in the home ‘ties you down’.

- Millennial men are most likely of the four age/gender cohorts to admit that they ‘never think to buy flowers’.

LEVEL OF AGREEMENT WITH VARIOUS NEGATIVE ATTITUDINAL STATEMENTS

% Strongly/Somewhat agree



Among Millennial Women, level of agreement is generally higher for all four statements among...

- Those who earn <\$50k/year and those who live with parent(s), roommates or someone else are more likely to agree that ‘flowers are inconvenient to give’.
- Those who live alone are more likely to believe ‘plants tie you down’.
- Home owners and those who live in a detached or semi-detached dwelling are more likely to ‘never think to buy flowers’.
- Frequent purchasers of cut flowers/houseplants are less likely to agree to with these negative statements.

Q36. This question asks you to consider various statements - some are about houseplants and some are about cut flowers. Please indicate the extent to which you agree or disagree with each of the following statements.

Base: Total Sample



FACTORS THAT MIGHT INFLUENCE THE PURCHASE OF CUT FLOWERS AND HOUSEPLANTS

Across the total sample, combining those who viewed the flowers with the tag, and those who viewed them without, more than half express interest in purchasing them for \$19.95. Results do not vary by age/gender cohort.

INTEREST IN PURCHASING FLOWERS FOR \$19.95



	Millennial Women (age 25-35)	Post Millennial Women (ages 36-55)	Millennial Men (ages 25-35)	Post Millennial Men (ages 36-55)
	n=400	100	100	100
	%	%	%	%
TOTAL VERY/SOMEWHAT INTERESTED	56	53	56	56
Very interested	15	12	15	13
Somewhat interested	42	41	41	43
Not too interested	33	28	25	24
Not at all interested	11	19	19	20
TOTAL NOT TOO/NOT AT ALL INTERESTED	44	47	44	44

Among Millennial Women, level of interest is greatest among...

- Frequent purchasers of flowers/houseplants.
- Those who always/sometimes had flowers/plants in the home growing up
- Those born outside of Canada.
- Those who value organically grown produce.

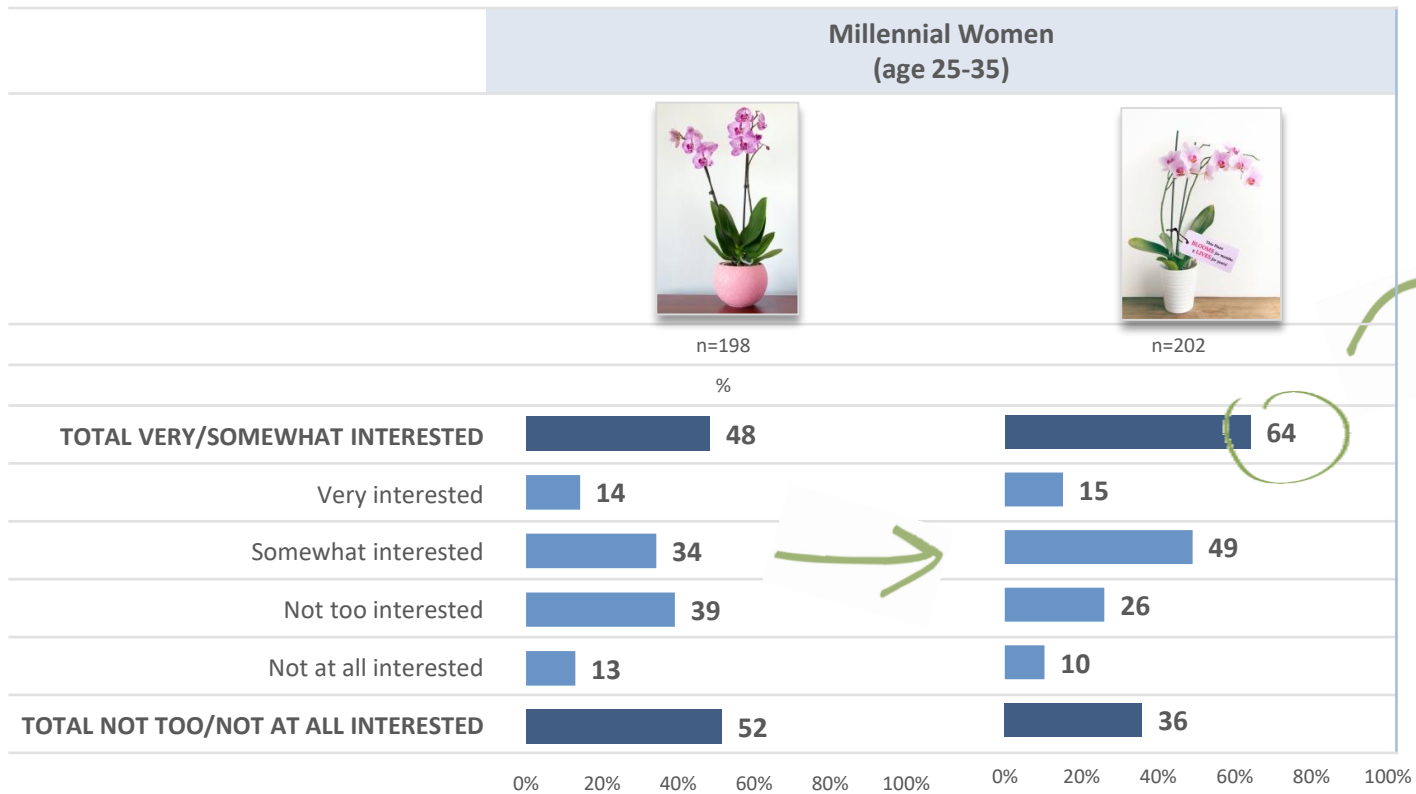
Q18a. ASKED OF HALF OF THE SAMPLE: This is a picture of an orchid. Based on what you know about orchids, how interested would you be in purchasing this plant if it cost \$19.95?

Q18b. ASKED OF HALF OF THE SAMPLE: This is a picture of an orchid. Based on what you know about orchids, and the information provided, how interested would you be in purchasing this plant if it cost \$19.95?

Base: Combined to create 'total sample'

The proportion 'somewhat interested' is significantly higher among those shown a picture that includes additional information indicating 'blooms for months and lasts for years'.

INTEREST IN PURCHASING FLOWERS FOR \$19.95



50% among post-millennial women

The proportion 'very interested' in the tagged flower is greater among millennials (17% of men and 15% of women) than post-millennials (7% of both men and women).

Q18a. This is a picture of an orchid. Based on what you know about orchids, how interested would you be in purchasing this plant if it cost \$19.95?

Base: Split total sample

Q18b. This is a picture of an orchid. Based on what you know about orchids, and the information provided, how interested would you be in purchasing this plant if it cost \$19.95?

Base: Split total sample

The health of pollinators and the decline of their populations is clearly of concern to all, including millennial women. Across all four gender/age cohorts, the level of concern expressed about pollinators surpasses that for pesticide usage.

- The level of concern for pollinator populations and health is greater among post-millennials than millennials.
- Concern about pesticide usage is greatest among post-millennial men.

LEVEL OF CONCERN ABOUT VARIOUS ENVIRONMENTAL FACTORS

% Very/Somewhat concerned

	Millennial Women (ages 25-35)				Millennial Women	Post Millennial Women (ages 36-55)	Millennial Men (ages 25-35)	Post Millennial Men (ages 36-55)
	n=400				400	100	100	100
	%				%	%	%	%
The decline in pollinator populations all over North America	42	31	20	7	73	80	70	82
The health of pollinators (such as honey bees) in your local area	42	34	19	5	76	82	68	81
Pesticide treatment of cut flowers	31	32	27	10	63	62	57	68
Pesticide treatment of indoor (potted) houseplants	31	29	30	10	60	56	53	66
Pesticide treatment of outdoor (bedding) plants	35	32	25	7	67	65	60	74

- Very concerned
- Somewhat concerned
- Not too concerned
- Not at all concerned

Millennial women who live with their parent(s), a roommate or someone else and those who earn <\$50k per year in household income express LESS concern about pollinators and MORE concern about pesticide usage.

Among Millennial Women, greater levels of concern are expressed by...

- frequent purchasers of flowers/houseplants.
- those who sometimes/always had flower/plants in the home growing up
- those who report at least one parent was an 'avid' gardener
- those who value organically grown produce.
- those with dietary restrictions (vegan/vegetarian/pescetarian)

Q37. How concerned are you about the following...
Base: Total Sample

A message indicating that the plant would help increase the local pollinator population would influence about two-thirds of millennial women to purchase plants. About half would be motivated by the other two statements (about biocontrol's and pesticides).

- Post-millennials, more so than millennials, would be influenced by these three statements.
- Post-millennial men are most likely to admit that these factors would influence their purchase decision.

INFLUENCE OF VARIOUS FACTORS ON PLANT PURCHASE DECISION

% Top 3 (7,6,5)

	Millennial Women (ages 25-35)					Millennial Women	Post Millennial Women (ages 36-55)	Millennial Men (ages 25 -35)	Post Millennial Men (ages 36-55)
	n=400					400	100	100	100
	%					%	%	%	%
That the plant has not been treated with any pesticides	22	28	22	16	12	50	62	47	72
That the plant would help to increase the pollinator population in your local area	29	35	18	9	9	64	69	53	76
That the plant has been treated with biocontrol's (releasing good bugs to eat the harmful bugs)	18	35	26	11	10	53	62	50	64

Millennial women who live with their parent(s), a roommate or someone else are less likely than average to suggest that they would be influenced by a message regarding pollinator populations.

- Greatly influence purchase decision (7)
- (6,5)
- (4)
- (3,2)
- Would have no impact (1)

Among Millennial Women, these factors would be more influential among...

- frequent purchasers of flowers/houseplants.
- those who sometimes/always had flower/plants in the home growing up
- those who report at least one parent was an 'avid' gardener
- those who value organically grown produce.
- those with dietary restrictions (vegan/vegetarian/pescetarian)

Q38. When buying a plant, how much influence does each of the following have on your purchase decision? For each statement, please select a number from 1 to 7, where 7 means it would greatly influence your purchase decision when buying a plant, and 1 means it would have no impact at all on your purchase.

Base: Total Sample

When it comes to factors that might motivate the purchase of houseplants, ‘lower cost’ and ‘reduced maintenance’ would be bigger drivers than ‘variety’. This is the case for all four gender/age cohorts.

EXTENT TO WHICH VARIOUS FACTORS WOULD ENCOURAGE THE PURCHASE OF HOUSEPLANTS

% Top 3 (7,6,5)

	Millennial Women (ages 25-35)	Millennial Women	Post Millennial Women (ages 36-55)	Millennial Men (ages 25 -35)	Post Millennial Men (ages 36-55)
	n=400	400	100	100	100
	%	%	%	%	%
If they were less expensive	34	68	71	73	67
If there was greater variety/you could buy more unusual types of plants	20	52	53	57	58
If they required less maintenance	33	69	67	66	62

■ Greatly motivate to purchase (7) ■ (6,5) ■ (4) ■ (3,2) ■ Would have no impact (1)

Among Millennial Women, certain groups would be more motivated by all three of these factors...

- those who value organically grown produce
- those who sometimes/always had flower/plants in the home growing up
- those born outside of Canada provide higher ratings than those born in Canada.
- those who earn <\$50k in household income provide higher scores compared to higher income earners.

Frequent purchasers of flowers/ houseplants are more likely to be motivated by ‘greater variety’, compared to those who purchase houseplants/flowers less often than once every 3 months. Homeowners are more likely than renters to be motivated by ‘cost’.

Q41. To what extent would each of the following encourage you to buy houseplants more often? **For each statement, please select a number from 1 to 7, where 7 means it would greatly motivate you to purchase houseplants, and 1 means it would have no impact at all.**

Base: Total Sample

When it comes to the factors that influence the purchase of flowers, across all four segments, 'cost' and 'how long they last' are more important than 'variety'. Cost appears to be a bigger barrier for flowers than houseplants, as a greater proportion select 'less expensive' when it comes to flowers, as compared to houseplants (shown on previous slide).

EXTENT TO WHICH VARIOUS FACTORS WOULD ENCOURAGE THE PURCHASE OF FLOWERS

% Top 3 (7,6,5)

	Millennial Women (ages 25-35)	Millennial Women	Post Millennial Women (ages 36-55)	Millennial Men (ages 25-35)	Post Millennial Men (ages 36-55)
	n=400	400	100	100	100
	%	%	%	%	%
If they were less expensive	47 30 12 6 5	77	77	75	72
If there was greater variety/you could buy more unusual types of flowers	19 31 24 15 11	50	58	59	60
If they lasted longer	41 35 14 5 5	76	81	72	77

■ Greatly motivate to purchase (7) ■ (6,5) ■ (4) ■ (3,2) ■ Would have no impact (1)

Among Millennial Women, certain groups would be more motivated by all three of these factors...

- Frequent purchasers of flowers/houseplants.
 - Those who earn <\$50k in household income.
- Those who value organically grown produce and those born outside of Canada are more likely to indicate that 'greater variety' would motivate purchase.

Q40. To what extent would each of the following encourage you to buy flowers more often? **For each statement, please select a number from 1 to 7, where 7 means it would greatly motivate you to purchase flowers, and 1 means it would have no impact at all.**

Base: Total Sample

Three of the tested statements about flowers would stimulate purchase among at least seven-in-ten millennial women: ‘they improve mental health’, ‘have a healing effect’ and ‘purify the air’. The other two statements are viewed as less motivating.

- Post-millennial women would be slightly more motivated than the other three groups by a message about ‘concentration/memory’.

EXTENT TO WHICH VARIOUS STATEMENTS WOULD MOTIVATE THE PURCHASE OF FLOWERS

% Top 3 (7,6,5)

	Millennial Women (ages 25-35)	Millennial Women	Post Millennial Women (ages 36-55)	Millennial Men (ages 25 -35)	Post Millennial Men (ages 36-55)
	n=400	400	100	100	100
	%	%	%	%	%
Flowers improve mental health by making people happier	38 37 12 8 5	75	79	72	77
Flowers have been shown to help with concentration and memory	25 35 16 15 9	60	75	65	63
Flowers have been shown to enhance learning in children	22 31 19 15 13	53	61	58	55
Flowers have been shown to have a healing effect	33 37 14 10 6	70	73	63	73
Flowers help purify the air	34 38 15 7 7	72	74	73	67

■ Greatly motivate to purchase (7) ■ (6,5) ■ (4) ■ (3,2) ■ Would have no impact (1)

Among Millennial Women, certain groups would be more motivated by these messages...

- frequent purchasers of flowers/houseplants.
- those who sometimes/always had flower/plants in the home growing up
- those who value organically grown produce.

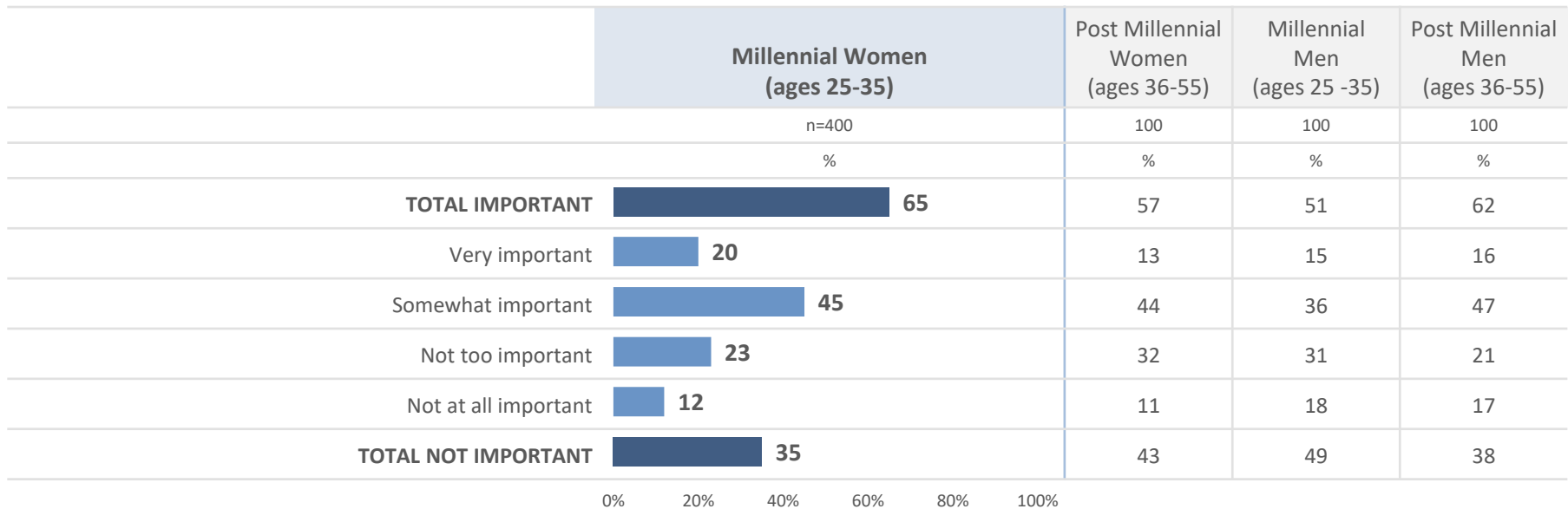
Those born outside of Canada are more likely than those born in Canada to be motivated by the ‘enhanced learning in children’ and ‘help with concentration/memory’ messages.

Q39. To what extent would the following statements motivate you to consider buying cut flowers? **For each statement, please select a number from 1 to 7, where 7 means it would greatly motivate you to purchase flowers, and 1 means it would have no impact at all.**

Base: Total Sample

Organically sourced food products are important to about two-thirds of millennial women, and this group is more likely than the other three age/gender cohorts to indicate that this is ‘very important’.

IMPORTANCE OF ORGANICALLY-SOURCED FOOD PRODUCTS



Among Millennial Women, ‘total important’ is greater among...

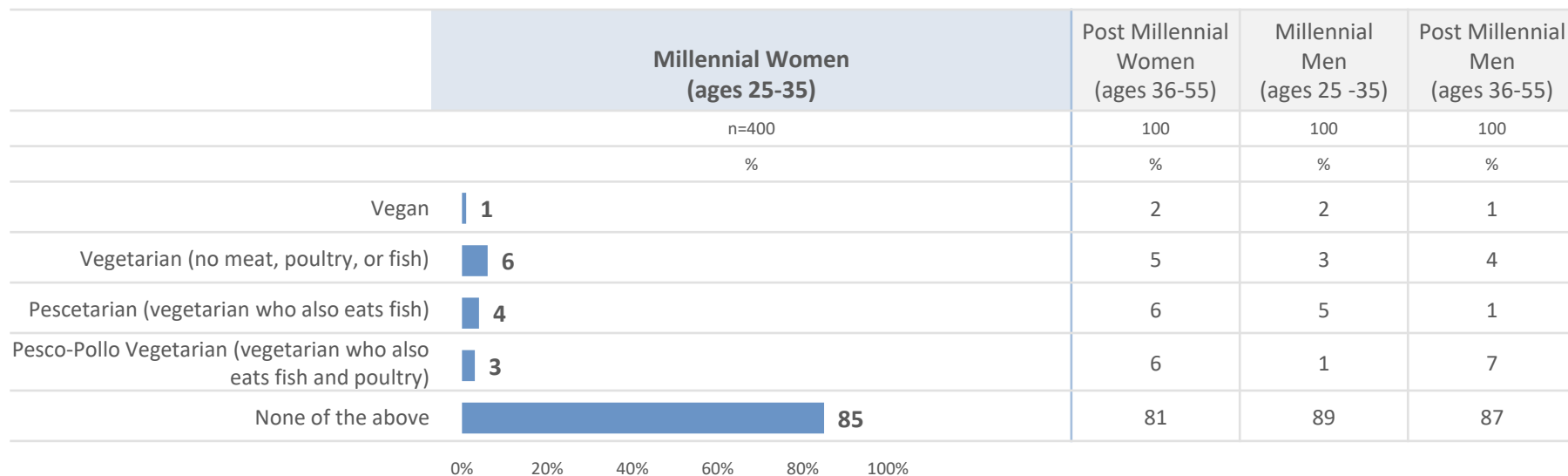
- frequent purchasers of flowers/houseplants
- those who sometimes/always had flower/plants in the home growing up
- those who are vegan/vegetarian/pescetarian
- those who live with their parent(s), a roommate or someone else
- homeowners (compared to those who rent)
- those born outside of Canada compared to those who are Canadian-born
- low income earners (versus those who make >\$50k per year in household income)

Q46. How important are organically sourced food products to you personally?

Base: Total Sample

Fewer than one-in-ten millennial women would describe themselves as truly vegetarian or vegan. Results do not vary much by gender/age cohort.

DIETARY PREFERENCES



Among Millennial Women, a greater proportion of the following subgroups describe themselves as vegan, vegetarian, pescetarian or pesco-pollo vegetarian...

- Frequent purchasers of flowers/houseplants
- Those who value organic food products
- Those born outside of Canada compared to those who are Canadian-born
- Low income earners (versus those who make >\$50k per year in household income)

Q45. Would you describe yourself as...

Base: Total Sample

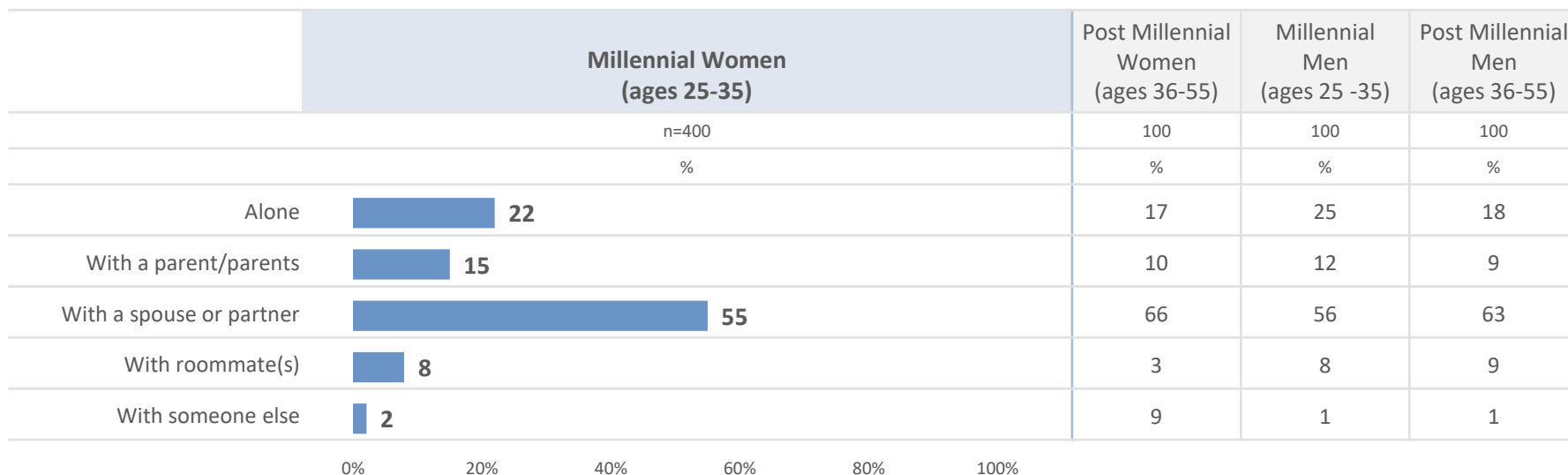


ABOUT THE HOME/LIVING ENVIRONMENT

Generally, household living situation seems to vary by age but not by gender. More than half of millennial women (55%) live with a spouse/partner, and one-in-five live alone. Fully 15% live with their parent(s).

- The proportion living with a spouse/partner is greater among post-millennials than millennials. Millennials are more likely than post-millennials to live alone.
- Post-millennial women are the least likely to live with a roommate, but they are more likely than other age/gender cohorts to live 'with someone else'.

HOUSEHOLD LIVING SITUATIONS











Q4. Which of the following best describes your household living situation? I live...

Base: Total Sample

Almost half of millennial women (46%) live in a fully or semi detached home, while 12% live in a townhouse or duplex and four-in-ten (40%) live in a condo or apartment.

- Among millennials, men are less likely than women to live in a condo, but they are more likely to live in a detached house.
- Among post-millennials, men and women are very similar in terms dwelling type, with the majority living in a detached house.

TYPE OF DWELLING LIVED IN

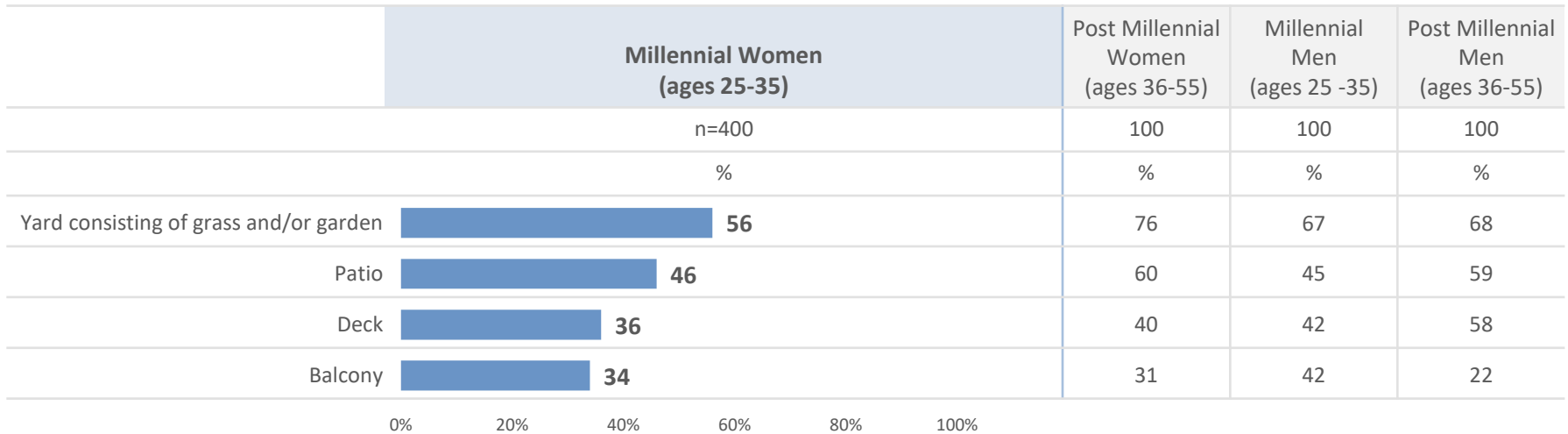
	Millennial Women (ages 25-35)	Post Millennial Women (ages 36-55)	Millennial Men (ages 25 -35)	Post Millennial Men (ages 36-55)
	n=400	100	100	100
	%	%	%	%
House (detached)	 37	58	48	56
House (semi-detached)	 9	9	11	10
Townhouse	 11	9	9	8
Duplex	 1	3	2	--
Condominium	 17	12	8	15
Apartment	 23	9	22	11
Flat	 1	--	--	1
Other	 1	--	--	--
	0% 20% 40% 60% 80% 100%			

Q5. Do you live in a:
Base: Total Sample

More than half of millennial women indicate that their home has a yard and almost half have a patio. About one-third report that they have a balcony and about the same proportion have a deck.

- Millennial women are less likely than the other three gender/age cohorts to live in a home with a yard.
- Millennials (men and women) are less likely than post-millennials to have a patio.
- Post-millennial men are most likely to have a deck.
- The incidence of having a balcony is greatest among millennial men and lowest among post-millennial men.

OUTDOOR FEATURES OF THE HOME



Among Millennial Women...

- The incidence of living in a home with a yard, deck or patio is greater among home owners versus renters.
- Balconies are most common among those living in condominiums and/or apartment buildings. The incidence of having a balcony is highest among those living alone and renters.

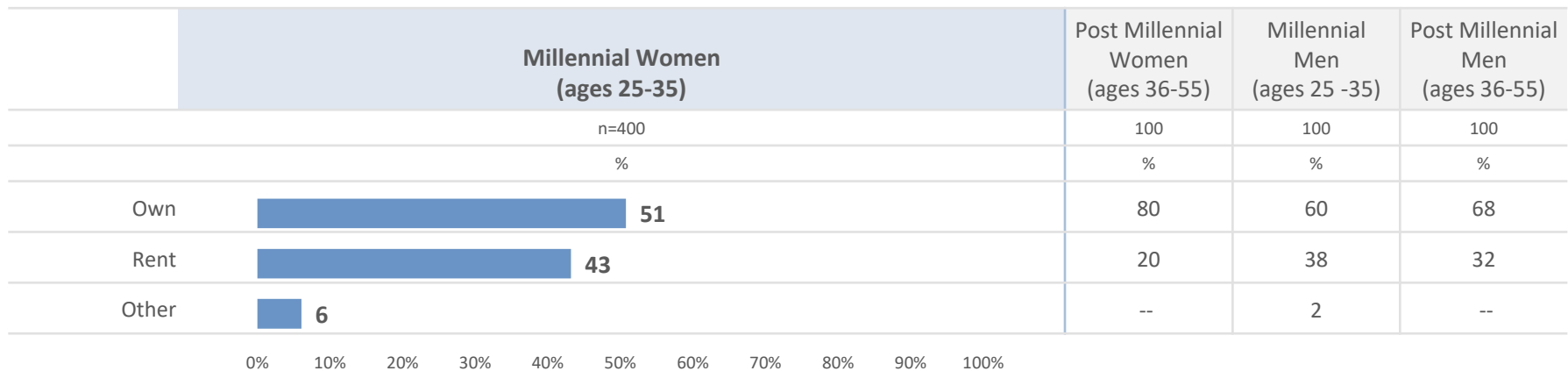
Q7. Does the home you live in have any of the following features?

Base: Total Sample

Millennial women are the least likely of the four segments to own their place of residence. About half of millennial women own the home in which they live.

- The incidence of home ownership is greatest among women 36 to 55 years of age.

HOME OWNERSHIP (VERSUS RENTING)



Home ownership is more common among...

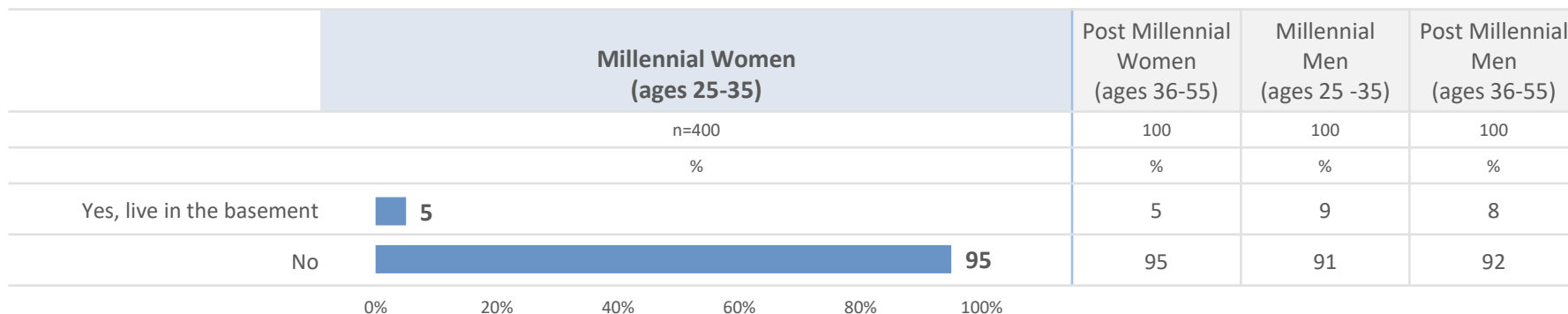
- Frequent purchasers of flowers/houseplants
- Those who value organic food products
- Those born in Canada compared to those who are Canadian-born
- Those living with a spouse/partner
- Those who do not live in a condo/apartment
- High income earners (versus those who make <\$50k per year in household income)

Q6a. Do you own or rent the home in which you live?

Base: Total Sample

One-in-twenty millennial women live in the basement. The incidence of living in the basement is slightly greater among men than women, but does not seem to vary by age.

INCIDENCE OF LIVING IN THE BASEMENT



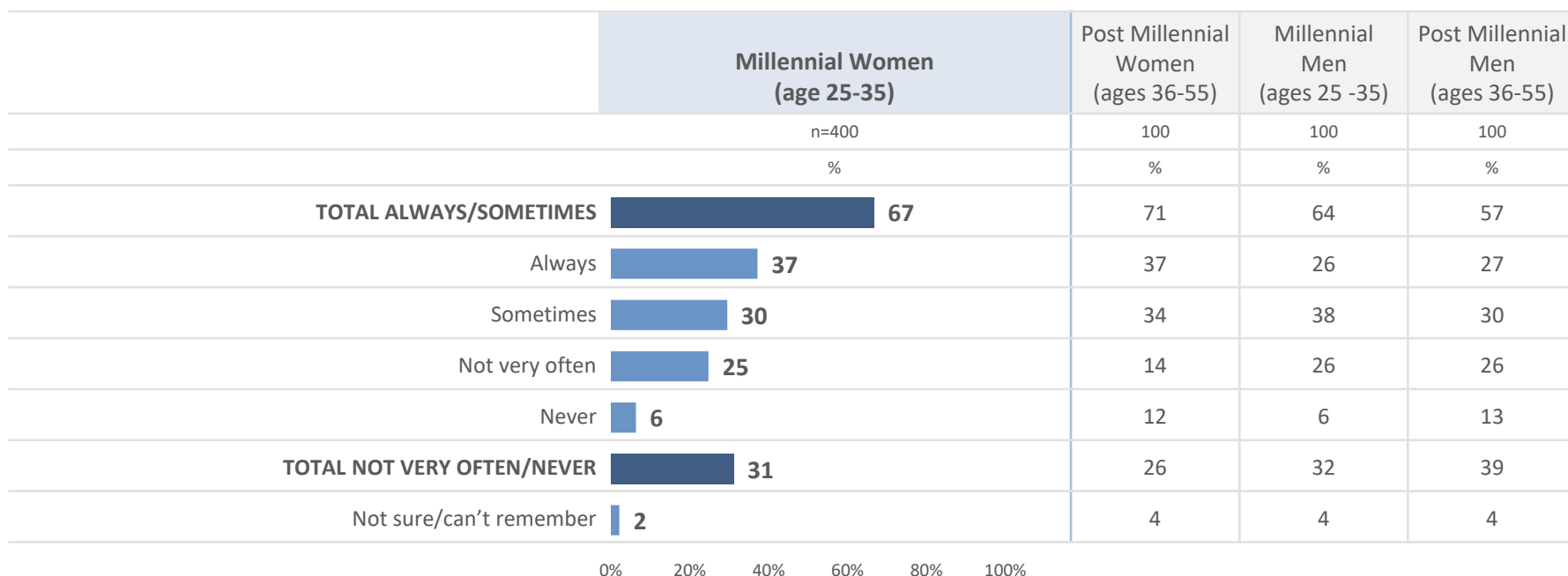
Q6. Do you live in the basement?

Base: Total Sample

Two-thirds of millennial women recall growing up in a home where there were always/sometimes cut flowers or houseplants.

- Women are more likely than men to indicate that there were ‘always’ cut flowers or houseplants in their homes.

FREQUENCY OF CUT FLOWERS/HOUSEPLANTS BEING PRESENT IN HOME WHILE GROWN UP



Among Millennial Women, the proportion indicating that they always/sometimes had cut flowers and houseplants at home, while growing up is greater among those who believe organically sourced food products are important and those who grew up with a parent that did at least some gardening.

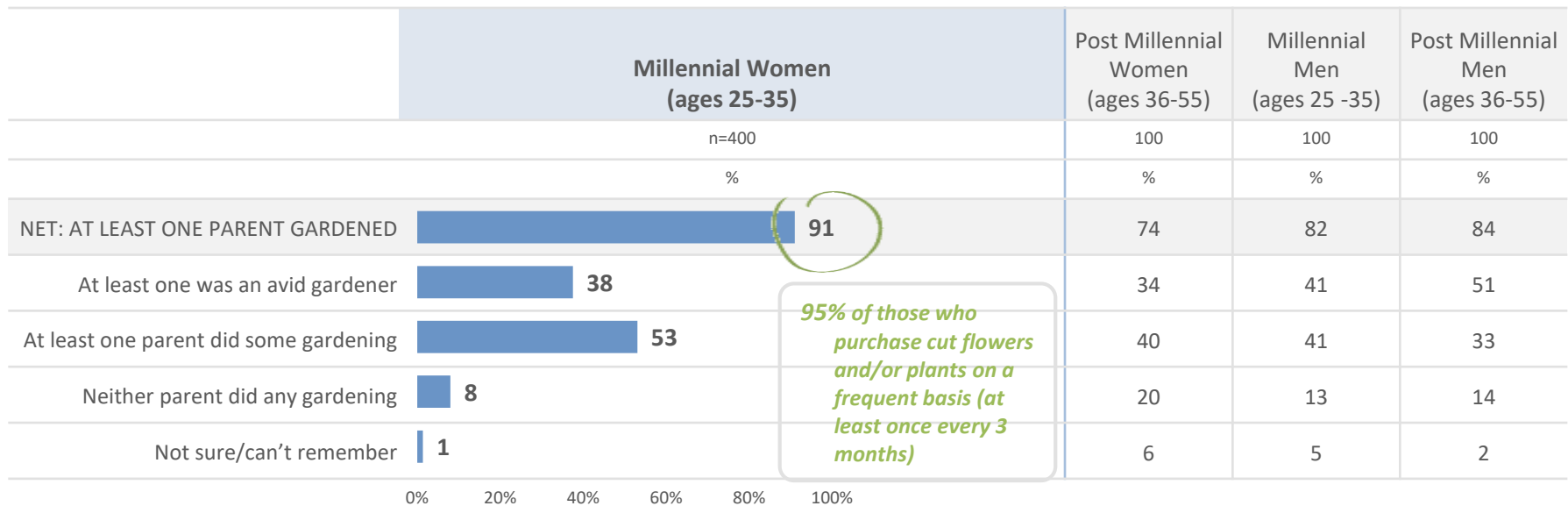
Q16. When you were growing up, to the best of your recollection, how often did you keep cut flowers or houseplants in your home?

Base: Total Sample

The vast majority of millennial women recall growing up with a parent or parents who were gardeners – a greater proportion than found across the other three gender/age cohorts. In fact, almost four-in-ten suggest that at least one parent was an ‘avid gardener’.

- Post-millennial women are least likely to report have parent(s) who did at least some gardening.

GARDENING HABITS OF PARENTS



Q14. When you were growing up, did at least one of your parents garden?

Base: Total Sample



DEMOGRAPHICS

Demographics

AGE, GENDER AND EMPLOYMENT STATUS

	Millennial Women
	400
	%
Age	
25-30	52
31-35	48
36-42	--
43-49	--
50-55	--
Gender	
Male	--
Female	100
Other	--

	Millennial Women
	400
	%
Employment Status	
Unemployed	--
Employed full time	75
Employed part time	9
Self Employed	5
Retired	--
A homemaker	3
A student	5
Other	2

Demographics

EDUCATION AND ANNUAL HOUSEHOLD INCOME

	Millennial Women
	400
	%
Highest Level of Education Obtained	
Public/elementary school	1
Some high school	--
Graduated high school	4
Some vocational/technical/college/CEGEP	4
Completed vocational/technical/college/CEGEP	15
Some university	4
Graduated university	37
Post Graduate university studies	33
Prefer not to answer	1

	Millennial Women
	400
	%
Annual Household Income	
Under \$50,000	18
\$50,000 or more	66
Prefer not to answer	16

Demographics

PROPORTION BORN IN CANADA, WHERE CURRENTLY LIVE AND PART OF WORLD GREW UP IN

	Millennial Women
	400
	%
Born in Canada	
Yes	77
No	23
Where Live in Ontario	
Hamilton	6
Toronto	28
Rest of GTA	20
Central Ontario (excluding Toronto and rest of GTA)	7
Southwestern Ontario	18
Northern Ontario	5
Eastern Ontario	15
Other	1

	Millennial Women
<i>Among those NOT born in Canada</i>	91
	%
Part of World Grew Up in Prior to Coming to Canada	
Europe	25
Middle East	7
Africa	4
Caribbean	1
USA	8
Mexico	--
Central/South America	4
Asia	38
South Asia	11
Other	1

Demographics

ETHNIC OR CULTURAL GROUP

	Millennial Women
	400
	%
Ethnic or Cultural Group	
British (English, Irish, Scottish, Welsh)	19
French	3
Italian	5
Portuguese	2
Greek	1
Jewish	2
West Indian (Caribbean)	3
South Asian (Pakistani, East Indian)	5
East Asian (Chinese, Japanese, Korean)	12
West Asian or Arab (Armenian, Lebanese, Turkish, Iranian, etc)	1

	Millennial Women
	400
	%
Ethnic or Cultural Group (Cont'd)	
South East Asian (Vietnamese, Cambodian, Malaysian, Filipino)	3
South/Central/ Latin American	1
Other EUROPEAN (German, Scandinavian, Polish, Ukrainian, etc.)	14
African	2
Other	1
Canadian	56
Canadian - Aboriginal	3
American	1
American - Aboriginal	--