TRENDS 2013/14

Finding Your Bliss: Channeling the Forces of Nature

Presented at OFA Short Course

July 17, 2012

What You'll Get Out of Today

- Global Consumer Trends
- Big Garden Trends
- 12 Ways to Catch the Ripple
- Ways to Turn These Trends into Profits

#ShortCourse

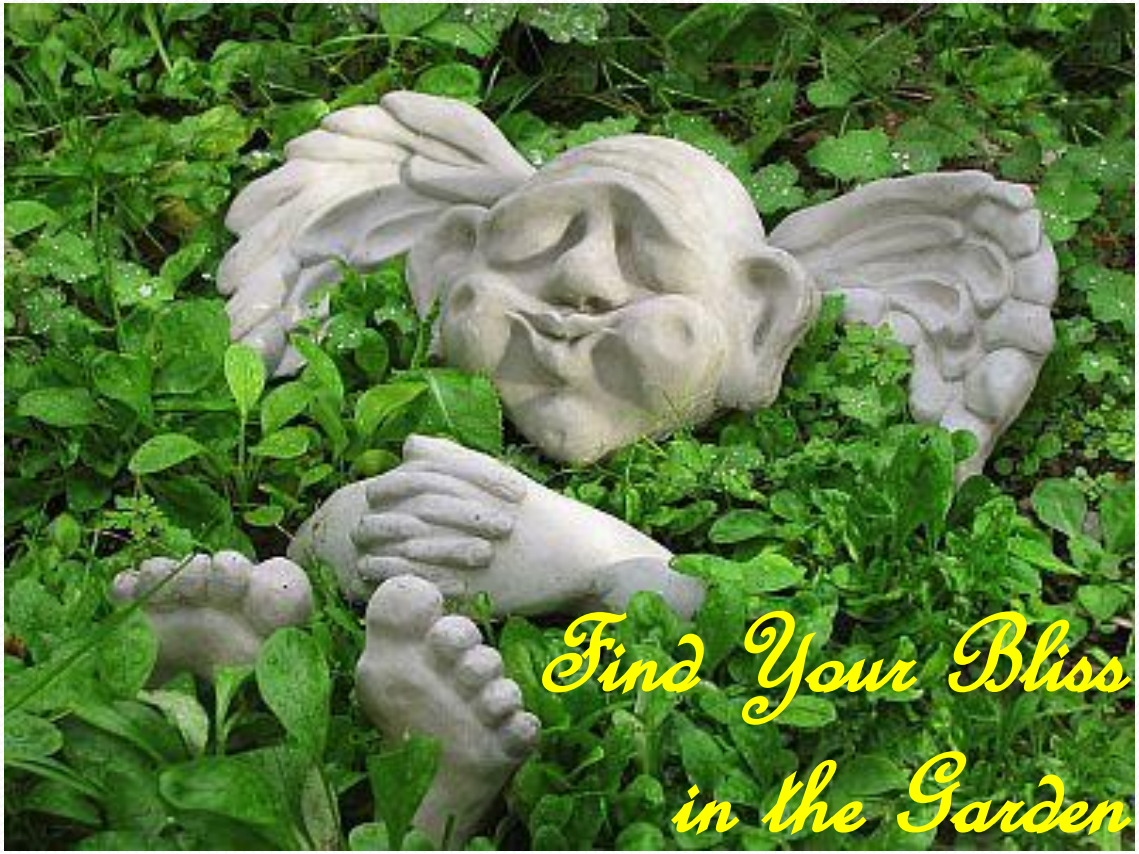
@GPBuzz

@SuziMcCoyGMG

Global
Consumer Trends
2013 to 2014

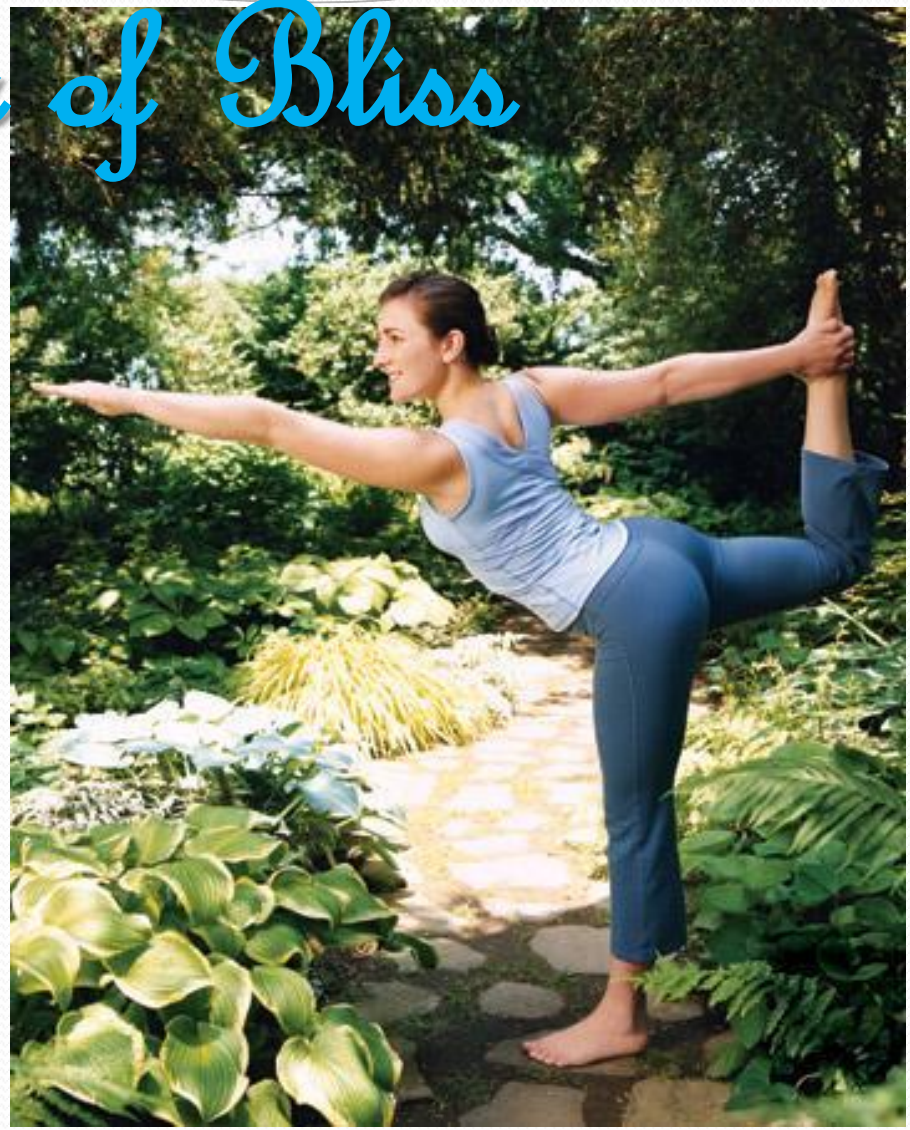
The Year of Bliss

- Positive energy
- Searching
- Values Shift
- Happi-nomics
- Hope
- Bright Colors
- Being in the Now



The Year of Bliss

- Bliss is the key
- Fed up with complexities of modern life
- Turning our back on fear
- Searching for spirituality
- Making the ordinary extraordinary
- Living in the moment



Li Edelkoort

Li Edelkoort

The Year of Bliss

- International Trends "Prophet"

- Considered one of the top 10 most influential people in fashion and home décor

Li Edelkoort

The Year of Bliss

- Need for more real emotions and tactile experiences
- Products being reinvented
- Handmade, traditional & local
- Nature as inspiration

Li Edelkoort

Ying and Yang

- Hope vs. Fear in facing economic uncertainties
- Hopeful people are accepting & adapting
- Fearful people are holding on & becoming self-absorbed
- Both will be more aware and critical
- Both need more services & care

Opportunity: Offer the personal touch, a renewed attention to detail

Li Edelkoort

The Year of Bliss:

Nature Inspired

- Environmentalism as Religious Quest
- Light and spiritual
- Caretakers of Mother Nature
- Urban Knights

Opportunity: Offer bliss workshops for growing, meditating, practicing yoga & even Zen weeding

Faith Popcorn Sea Changes to She-Changes

- Brainreserve Predictions 2012

- Futurist, author and founder and CEO of *BrainReserve*, International Trend Analyst

She-Changes

1. Very Young Women Leading
2. Nuclear Family 2.0
3. New Chivalry
4. Women Closing the Economy Gap
5. Women from the East are Setting the Example

Faith Popcorn

THE NUCLEAR FAMILY 2.0

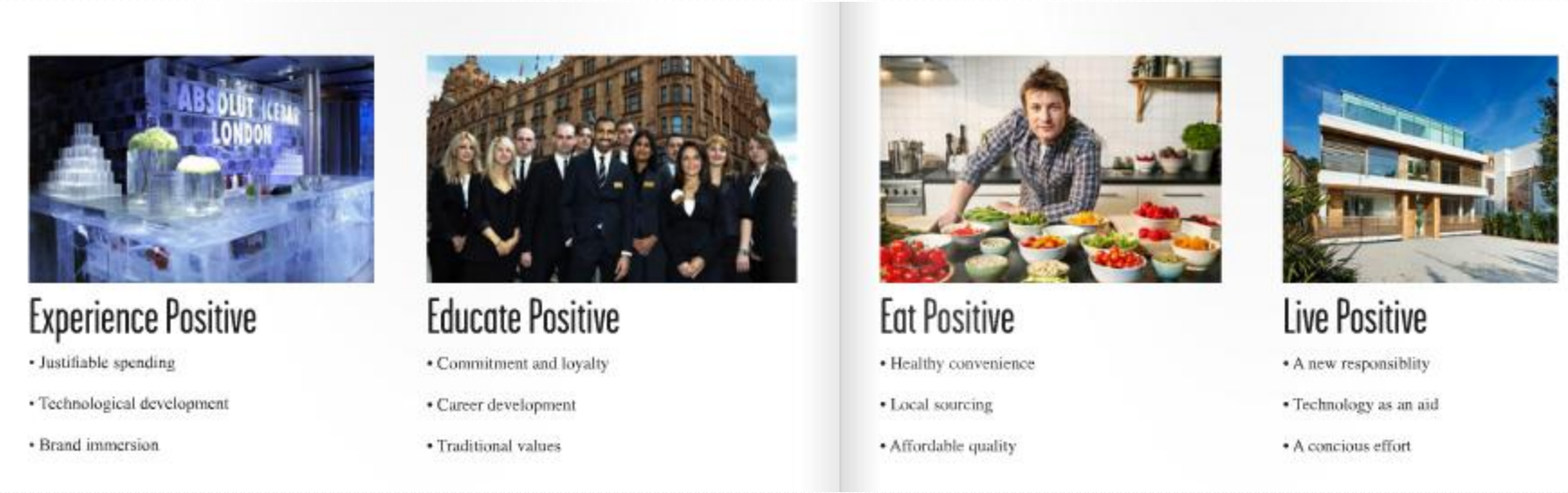
- More services
- Single parents come together to help raise children outside of marriages
- Day and night care centers
- More same sex parents
- More adult children living at home

Opp: Offer workshops for stay-at-home dads and Grandparents raising grandchildren

Faith Popcorn

Other Consumer Trends Effecting Gardening

Manifesto of Trends 2013: Experience Positive: A New Age of Value



L'espoir.com London

Individualism

- Significant 'sea change'
- Shift in American culture since 1960s toward more individualism
- Shift from we to me; shifting now from me to we
- Focus is on being "better and the best"
- Personalized for the individual
- Accelerated by social media has accelerated

OPP: Help customers feel independent and offer personalized attention

USA Today July 11, 2012

San Diego State University

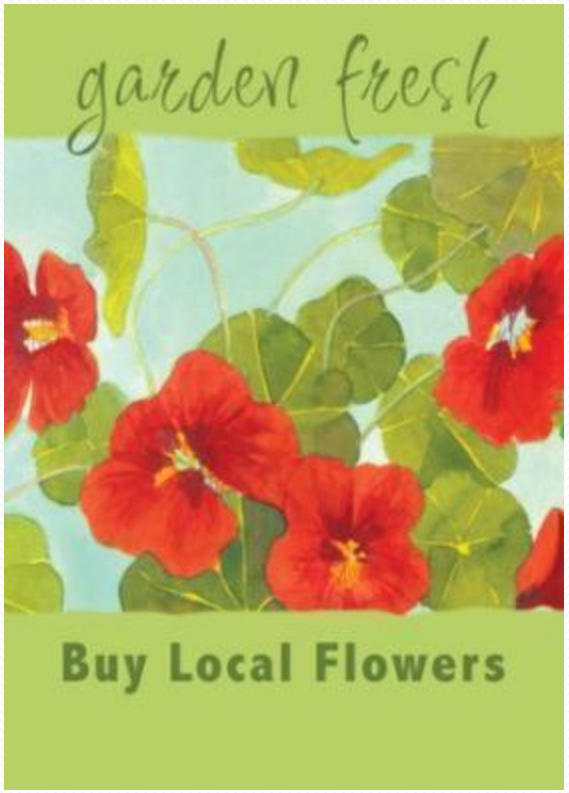
Smart Spenders

- New era of "pause and purchase"
- Consumers develop a stronger attitude towards spending.
- No longer focused primarily on cost
- Defined more by values

American Express

Values Impacting Shoppers

54%	I try to support my local economy
38%	I try to support my national economy
32%	I have higher taxes therefore I will spend less on the things I want
31%	I want to be part of my local community more so I purchase from more local brands and vendors
31%	The need to be constantly connected to technology



American Express

M=Power

- SOLOMOCO = SOcial, LOcal, MObile, COmmerce
- 1 in 3 mobile searches are local
- High conversation rate: 61% call and 59% visit.
- **CiCo** (Check-in to check-out): mobile devices allow consumers to "check-in" to influence and share deals with other shoppers before they "check out"

Opportunity: Act as a resource, making it easier for consumers to find you, buy from you and talk about you.

Single Women Home Owners

- WINKs— young women with incomes and no kids
- Young millennium women larger buying demo than female Boomers
- Increasingly influential demographic in the new home market
- Single women - 20% of all home buyers
- Represent 1/3 of the growth in all real estate ownership since 1994

U.S. National Association of Realtors

Opportunity: Special workshops in the evenings/weekends for single homeowners

Dr. Charlie Hall

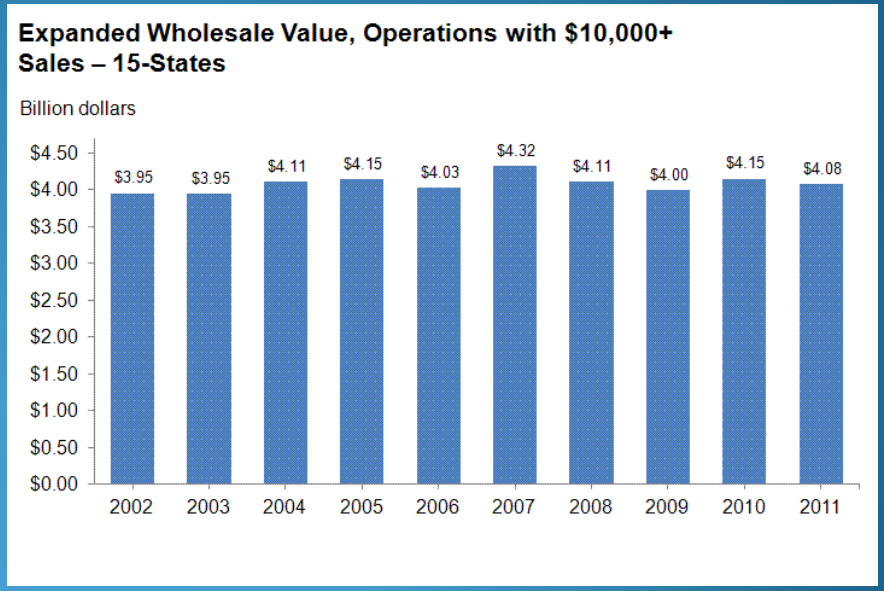
The Lipstick Index

- Dental services up
- Hotel occupancy up 3%
- Freight volumes set new record since 2005
- Home improvement sales projected to be up 4% Good sign- landscaping

"We're not a luxury in people's lives. We're a necessity in people's lives. We need to enhance sales by showing importance of green industry."

Garden Industry Trends

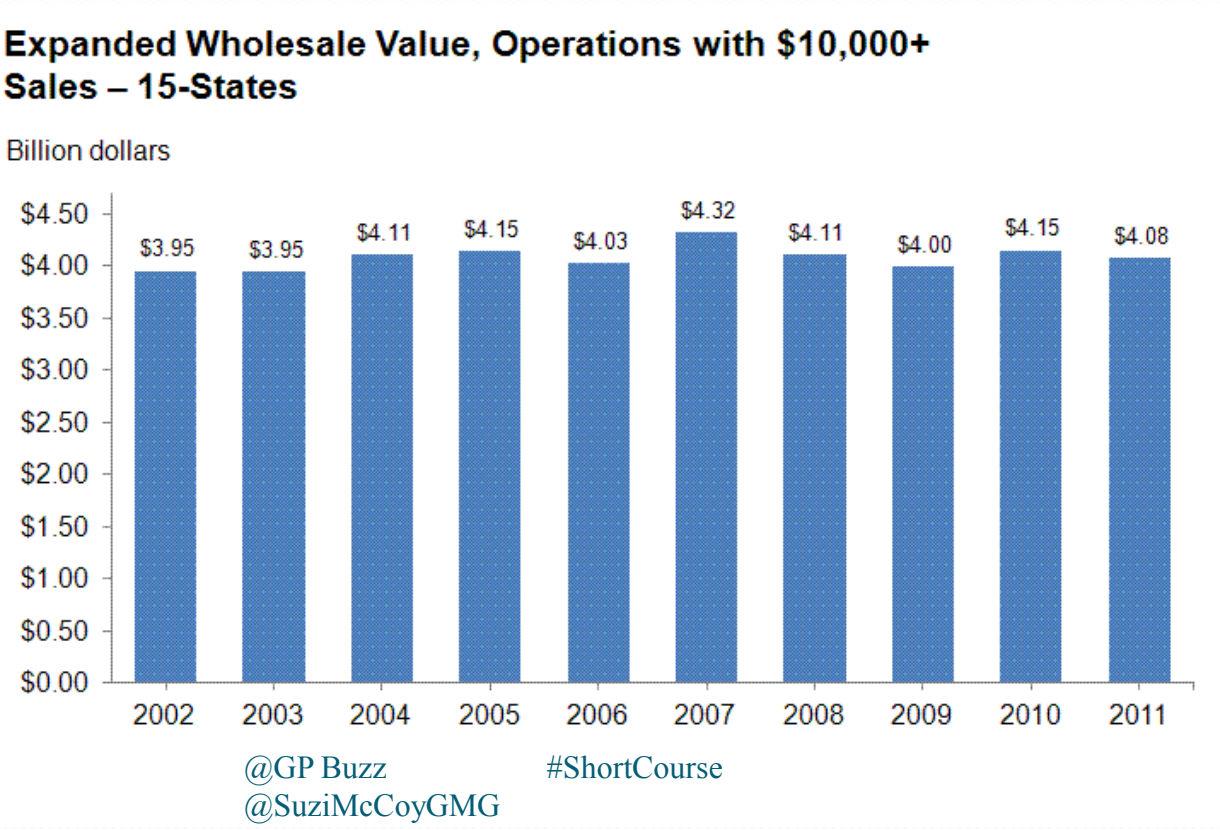
Let's look at some numbers



Floriculture Crops 2011 Summary (May 2012)

USDA, National Agricultural Statistics Service

Wholesale value down 2% $4.08 billion



Floriculture Crops 2011 Summary (May 2012)

USDA, National Agricultural Statistics Service

- Bedding/Herbaceous Garden Plants: Down 2%
- Annual Bedding/Garden Plants: Down 3%; growers down 6%
- Potted Herbaceous Perennials: Down slightly; growers down 6%
- Potted Flowering Plants: Down 1%
- Potted Orchids: Up 11%; producers down 6%
- Foliage Plants: Up 5%; producers down 9%

ASLA 2012 Survey

In all categories, these were Rated somewhat or very popular

- **97.4% Grills**
- **96.6% Low Maintenance Gardens & Landscape**
- 95.8% Fireplaces & Firepits
- 95.7% Dining & Seating
- 93.1% Lighting
- 91.5% Outdoor Living Spaces

Danielo Maffei, APLD

www.asla.org/NewsReleaseDetails.aspx?id=35277

ASLA 2012 Survey

- 86.9% Installed seating
- 86.3% Native Plants
- 85.4% Drought-tolerant plants
- 81.7% Drip Irrigation
- 81.2% Vegetable gardens
- 81.2% Weatherized outdoor furniture
- 71.6% Permeable Paving
- 61.2% Organic

www.asla.org/NewsReleaseDetails.aspx?id=35277

2012 National Garden Survey for 2011 Gardening Season

- Total DIY gardening:

  $29.1 billion

- 3,000,000 ***more*** gardeners in 2011
- Spending up 2% - an extra $688 million
- Avg spent: $351 - about the same as last year

OPP: Get 3 million to spend more

2012 National Garden Survey for 2011 Gardening Season

Shopping Habits:

- **51% National Chains**
  - Home Improvement Centers (30%)
  - Mass Merchants (21%)
- **17% Local Garden Centers** and Nurseries
- **14% Local Hardware** Stores

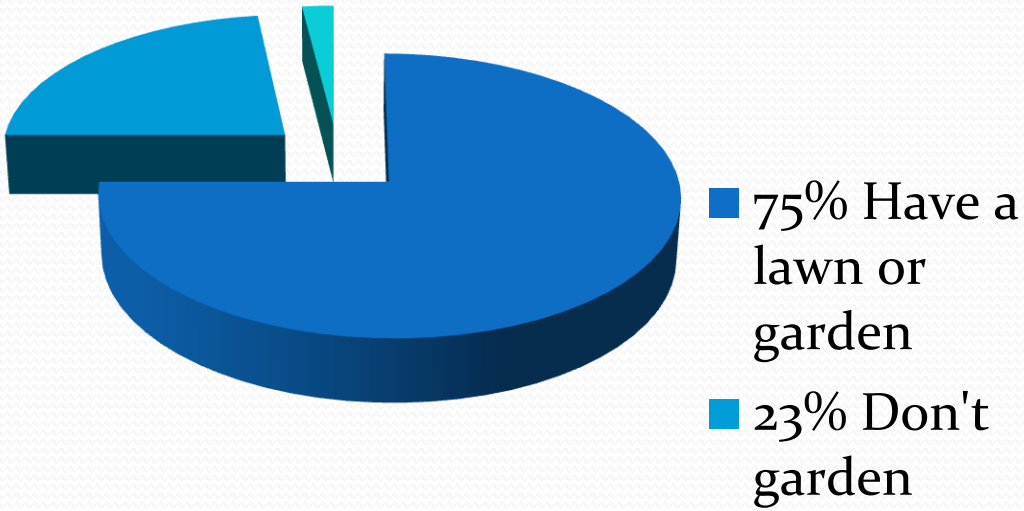
Opportunity: 18-34 year olds prefer spending their money with local businesses

GWAF's *2012 Spring Gardening Trends Research Report*

- GWAF's research contradicts NGA
- **49% plan to shops at garden centers**
  - 40% at IGC vs 51% at DIY in 2005
  - 49% at IGC **vs 38% at DIY** in 2012
- Choosing retailers based on:
  - **49% "Best Quality"**
  - 27% "Best Price"

GWAF's *2012 Spring Gardening Trends Research Report*

- 75% have a lawn or garden
- Avg spending $470/household for 2012 - same as last year
- Down 31% since 2009 $615/household
- 53% women vs 47% men



GWAF's *2012 Spring Gardening Trends Research Report*

Garden Planning Sources

- 63% friends and neighbors
- **51% garden centers**, nurseries & classes
- 43% books
- 41% magazines & newspapers

GWAF's *2012 Spring Gardening Trends Research Report*

Vegetable Gardening

- 66% grow their own vegetables
- 82% grow their own for better quality, taste and nutrition
- 46% say home grown vegetables are cheaper

Garden Industry Wave Makers

Themes of garden industry thought leaders & consumer campaigns

Garden Industry Wave Makers

- Dr. Charlie Hall, economist
- Our value proposition for the future: *Plants are necessities* not *luxuries*
- Economic benefits
- Eco-systems services benefits
- Health and well-being benefits

ellisonchair.tamu.edu

Garden Industry Wave Makers

- O2 for You
- Grassroots educational campaign on the benefits of indoor plants
- Industry wide opportunity
- Launched in 2009 by Costa Farms
- Tags, banners and videos for in-store promotions
- Supported by national marketing efforts

Garden Industry Wave Makers

- Series of videos from America in Bloom: More than just a pretty face
- Features Dr. Marvin Miller
- Videos explain why plants are more than just pretty
  - *Clean the Air*
  - *Make Kids Smart*
  - *Reduce Crime*
  - *Help You Heal*

Dr. Marvin Miller

World-Famous Hortistician

America in Bloom
Planting pride in our communities!

Garden Industry Wave Makers

- Plants Give Back:
  - FNGLA public service campaign
  - Small segments on different benefits of plants
  - From health to crime, touts the many, many benefits of plants to improve out lives

Plants Give Back YouTube

Garden Industry Wave Makers

- State by state initiative to educate consumers on the benefits of plants
- Created by Arizona Nursery Association
- Customized by state
- Drop down state garden center locator

www.plant-something.org

Garden Industry Wave Makers

- 2012 Garden Media Trends Report
- Cultivating the New Good Life with the Power of Plants
- **Vital**: Plants are necessary for health & well being
- **Vogue**: Plants are versatile and elicit emotions
- **Voyage**: Plants have cross-cultural influence

What's The Point?

- The industry is talking about the benefits of plants, not just how pretty plants are.
- Need to focus on the benefits for people
- How are plants relevant to our health and well being?
- Show consumers: "What's in it for me?"

12 Ways to Catch the Ripple

Channeling the Forces of Nature:

Ripple Effect *of the Benefits of Plants*

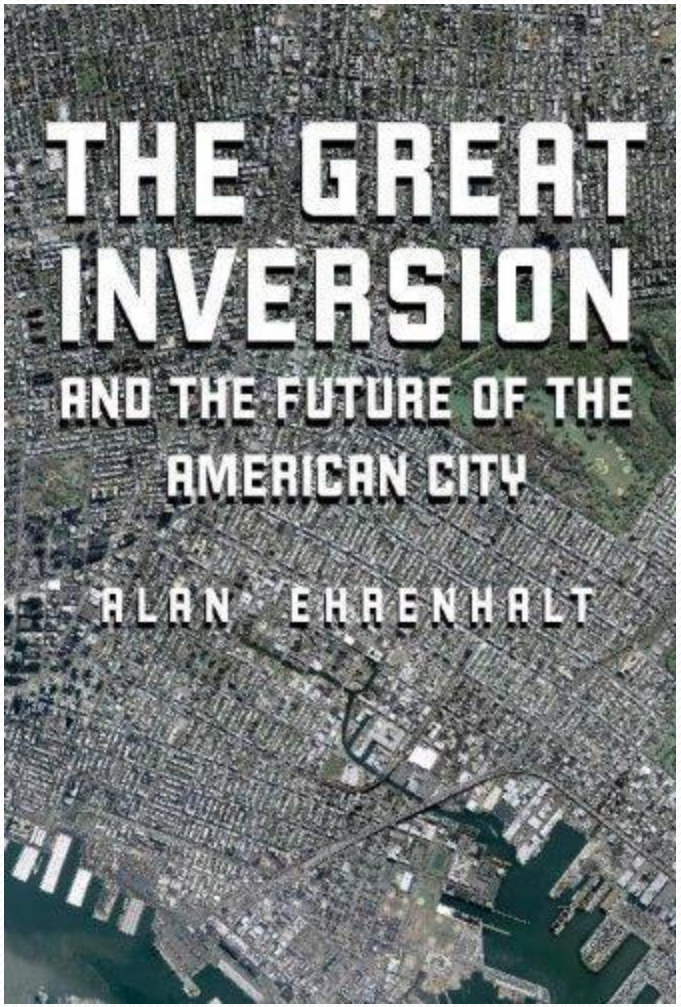
1. *Lifestyle Forces*
2. *Wellness Forces*
3. *eCono Forces*
4. *Color Forces*
5. *Natural Forces*
6. *Air Forces*
7. *Aqua Forces*
8. *Ground Forces*
9. *Light Forces*
10. *Inner Forces*
11. *Micro Forces*
12. *Shared Forces*

1. Lifestyle Forces of Nature

1. Lifestyle Forces of Nature

- Trading Spaces
- Cities are the new suburbs, suburbs the new cities.
- Wealthier people choosing to live in inner cities.
- Suburbs are going to be the home of immigrants and poorer people.

- *The Great Inversion and the Future of the American City*
  Alan Ehrenhalt



1. Lifestyle Forces of Nature: Re-Suburbia

- New Urbanism
- Millennials moving back into the center of cities
- Desire for life in town centers
- “Self-sufficient” living
- Want more connectivity
- Parklets
- Walk Scores
- Part of the ethos of the emerging generation

1. Lifestyle Forces of Nature: Urban Knights

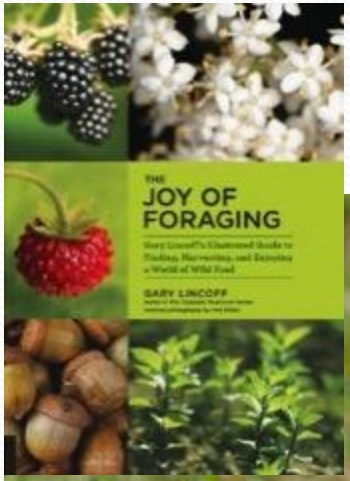
- Taking up the mantel of saving our cities
- Creating places that enrich, uplift, and inspire the human spirit.
- Living an urban lifestyle in sustainable, convenient and enjoyable places while providing solutions to peak oil and climate change
- Increased availability for living/working/recreational opportunities
- High quality of life well worth living

1. Lifestyle Forces of Nature: Farming 3.0

- Freedom loving and self reliant
- Growing own food from the land
- New Pioneers moving to country
- Urban farming
- Vacant-lot farming
- Raising chickens

1. Lifestyle Forces of Nature: Foraging

- Foraging in urban jungle to the wild, wild woods
- Edible riches in backyard, local parks, woods, and even roadside
- Easy Pickens
- Next stage of local fare for restaurants
- Foraging Apps



Foraging: Easy Pickin's

Hot new edibles

- Berries
- Small Fruit
- Herbs

1. Lifestyle Forces of Nature: IRL

In Real Life

- Put down the mouse and pick up the phone.
- Get back to life
- Real Facetime
- Facebook usage down 33% since January 2012

IRL – In Real Life

1. Lifestyle Forces of Nature

- Lawn Games are Back
- Getting outside more
- Michelle Obama's *'Let's Move' campaign*

Game On

2. Wellness Forces of Nature

2. Wellness Forces of Nature

- Health & Wellness #1 reason we select products (trendwatching.com)
- DIY Health
- Vegan diets
- Starbucks Juice Bars

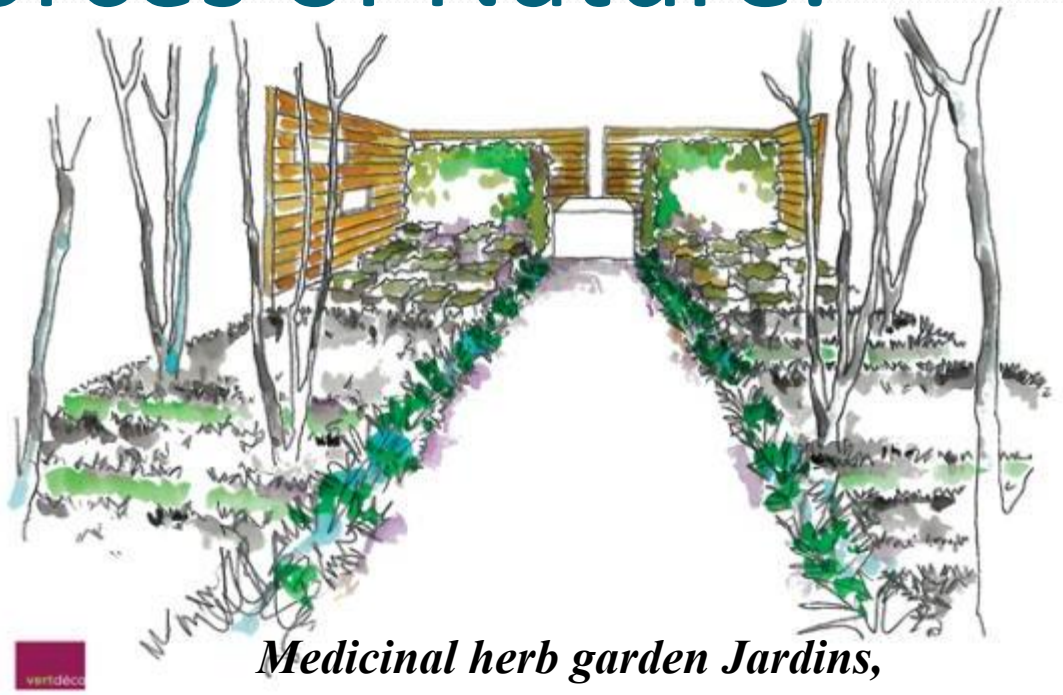
2. Wellness Forces of Nature

- Accelerates Healing Process
- Concentration and Memory
- Flowers Generate Happiness
- Exercise
- Improved Human Performance/Energy
- Improved Learning
- Mental Health
- Reduce Community Crime
- Reduce Stress
- Therapeutic Effects of Gardening
- Perceived Quality of Life

Dr. Charlie Hall, Marketing & Economics
ellisonchair.tamu.edu

2. Wellness Forces of Nature: Herbs

- Foodies & Medicinal
- Simple pleasures
- Easy to grow & enjoy
- Herbs will be the next hot edibles (GardenRant)
- DIY Health
- Desire to be in control
- Demand for natural-based products



Medicinal herb garden Jardins, Jardin 2012 Paris

2. Wellness Forces of Nature

Berry lifestyle

- Anti-oxidant rich
- Fresh fruit
- People who buy blueberry fruit buy blueberry plants
- New research shows blueberry consumption reduces growth and spread of breast cancer tumors in mice
- Other evidence eating blueberries reduces risks of Alzheimer's
- Hot new berry: Lingonberries

brazelberries™
Deliciously Beautiful Plants

3. eCono Forces of Nature

3. eCono Forces of Nature

- Increases retail spending
- Increases property values
- Homes sell faster
- Increases tourism
- Increases occupancy rates
- Reduced Health Care Costs

Dr. Charlie Hall, Marketing & Economics
ellisonchair.tamu.edu

3. eCono Forces of Nature

- Shifted Values
- Re-purpose
- Thrift Store Finds
- Recycled

4. Color Forces of Nature

4. Color Forces of Nature

Bright

Gold & Silver

Metallic

Eccentricity

Upbeat

Li Edelkoort

4. Color Forces of Nature

American Beauties NATIVE PLANTS

Cerulean Bright Blue

4. Color Forces of Nature

Purple is the new neutral

4. Color Forces of Nature

Positive Pink

4. Color Forces of Nature

4. Color Forces of Nature

Healthy Green

5. Natural Forces of Nature

5. Natural Forces of Nature

- Eco-scaping
- Designing with nature
- Naturing – a verb
- Natural Lawn & Garden Solutions
- Sustainable gardens
- Nativars

5. Natural Forces of Nature: Eco-scaping

Natives from American Beauties Native Plants attract beneficial wildlife

Hines Growers new dwarf Buddleia Lavender Veil and Purple Splendor attract hummingbirds and butterflies

5. Natural Forces of Nature: Trees

- Aggressive Restoration Efforts
- Tree Campaigns throughout Country
- Consumer Awareness of Economic Benefits of Plants
- Good Stewardship of the Earth

PLANT FOR THE PLANET

PlantaBillion.org

5. Natural Forces of Nature

- Demand is up for Natural Solutions to Pest control
- Safe for environment, people and pets

Havahart animal repellents are safe to animals and pets

RESCUE! Insect Traps use non-toxic pheromones

5. Natural Forces of Nature:

Glamping

Being '*in*' nature

6. Ground Forces of Nature

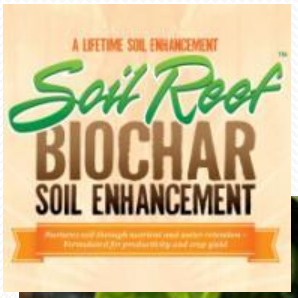
6. Ground Forces: Soil Health

- Eco-boosting: Go *beyond* sustainable
- Eco-Conspicuous
- Eco-Status
- Re-purposing
- Healing Mother Nature
- Urban Knights

- OPP: Offer recycled, re-purposed products and soils that are good for the earth

6. Ground Forces: Soil Health

- Restoring the soil
- Permaculture roots
- Mimics the ecology of the area
- Healthy plants start with healthy soil
- Soil Reef Bio Char
- Made over thousands of yrs



7. Air Forces of Nature

7. Air Forces of Nature

Nature's Air Purifiers

- Scrub the air clean
- Remove CO2 and VOC's
- Provide O2
- Add humidity
- Freshen spaces

Green Plants for Green Buildings

7. Air Forces of Nature

Air plants are the new terrariums.

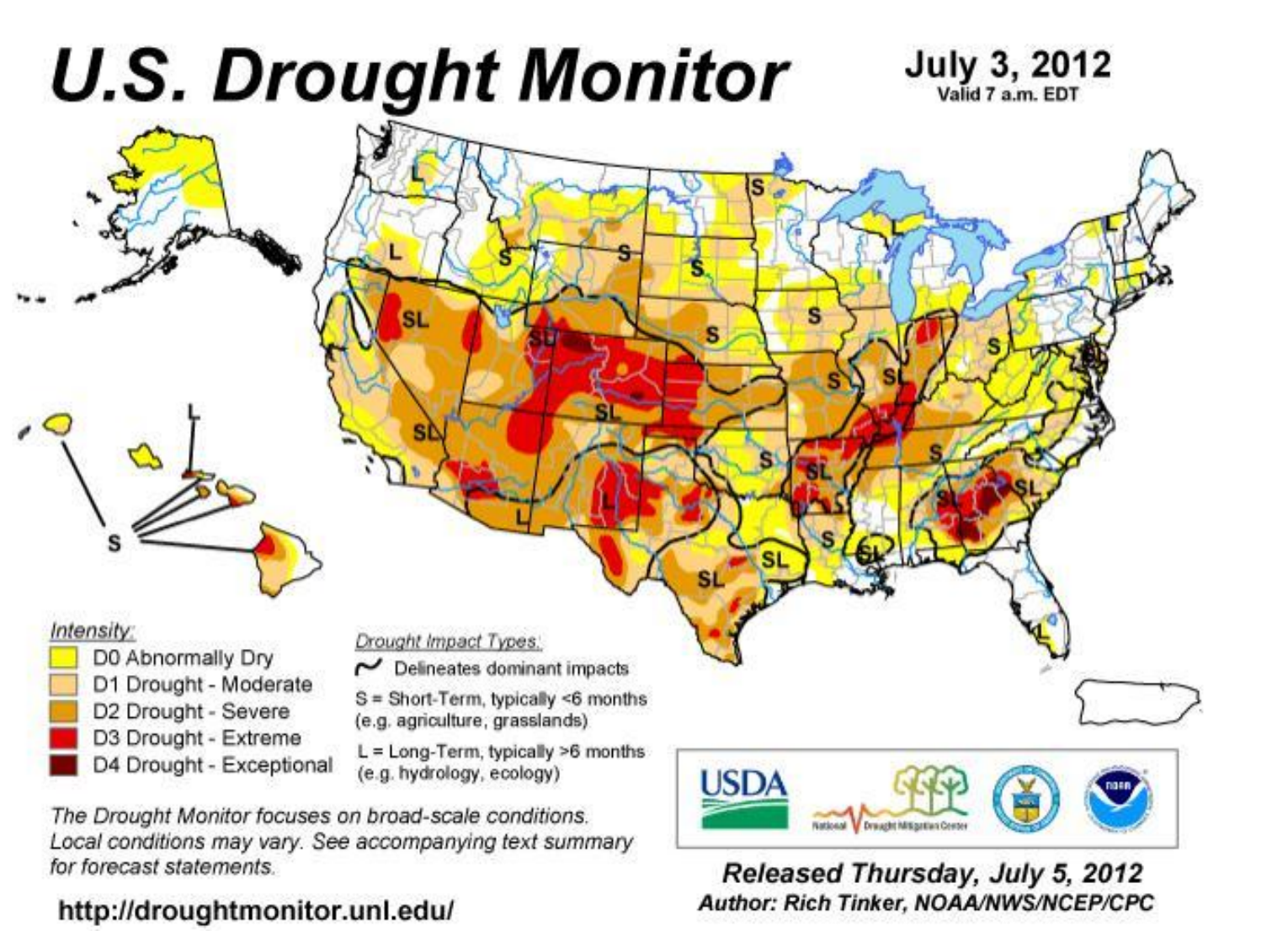
8. Aqua Forces of Nature

8. Aqua Forces of Nature

Water Prints

- The "**new**" carbon footprint
- **Physical risk**: freshwater shortage
- **Reputational risk**: image management
- **Regulatory risk**: increased governmental interference
- **Financial risk**: increased costs and/or reduced revenues

8. Aqua Forces of Nature



8. Aqua Forces of Nature

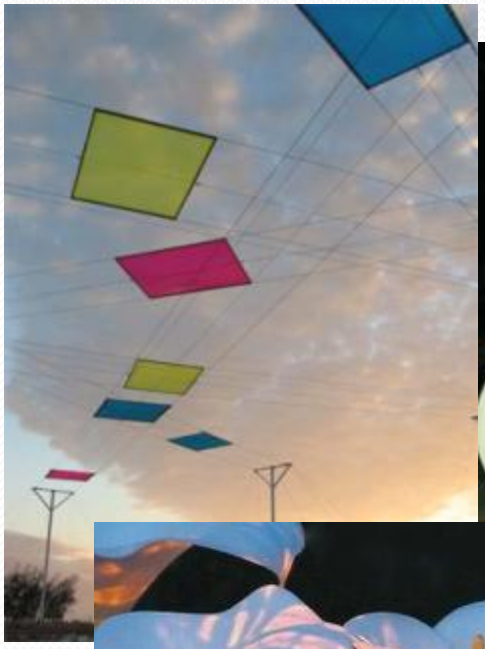
- Drought Tolerant Gardens
- High Tech Water Savings
- Rain Harvesting
- Nativars

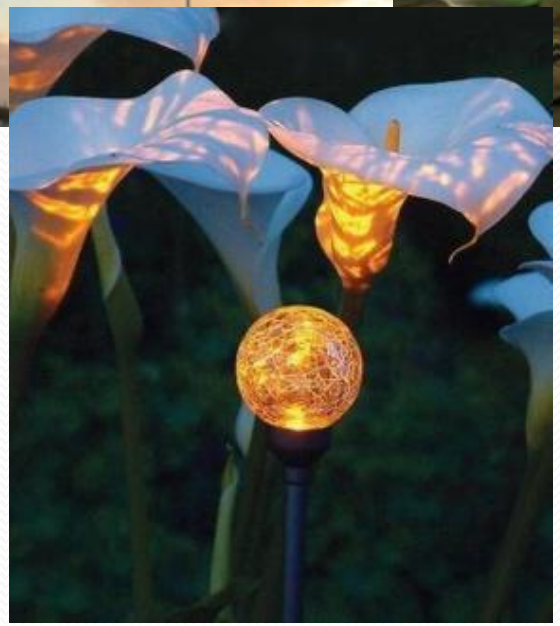
9. Light Forces of Nature

9. Light Forces of Nature

9. Light Forces of Nature

- Reflective Plants
- Lights in great places
- Up lighting
- Down lighting
- Light and airy





9. Light Forces of Nature

- Longwood Gardens
- Bruce Munro
- Light!
- 7 large-scale outdoor installations

Opp: Lights in ways you don't expect; lighting decorating workshops

10. Inner Forces of Nature

10. Inner Forces of Nature

- Longing to extend outdoors, inside
- Connection with nature
- Interiorscapes

10. Inner Forces of Nature

- Interior-scaping
- Peace of Mind
- Stress Reducing
- Lower Blood pressure
- Speed wound healing and recovery time

Anthuriums from Costa Farms

11. Micro Forces of Nature

11. Micro Forces of Nature

- Refers to anything miniature, not just mini gardening
- Containers
- Plants
- Impulse buys at counter
- Costa has adorable mini succulents as small as 2 in
- From fun to elegant

11. Micro Forces of Nature

- Micro gardens
- Mini plants
- Mini-Maxi
- Teeny tiny terrariums
- Mini Meditation gardens

12. Shared Forces of Nature

12. Shared Forces of Nature

- Shareable economy
- Collaboration and sharing important shifts in future trends
- Sharing things together
- Kickstarter, AirBnB websites emerging

Source: *Trend expert and curator of TrendTablet, Cecile Poignant*

Shareable Economy

12. Shared Forces of Nature

- 21st century new lifestyle
- Clustering
- Walking/biking to conveniences
- Shared Spaces
- Sustainable living
- New Economy

HOME & DIGITAL

PERSONAL JOURNAL.

Table Tennis, Anyone?

What a Shoe Designer Coveted Most

The Shared Backyard

Homeowners Exchange A Bit of Privacy for More Garden and Socializing

12. Shared Forces of Nature

- Garden Coaches
- Yard sharing
- Skill Sharing
- Farmers Markets
- CSAs
- Plant Swaps

Opps Unlimited: Partner with a local landscape designer; bring in community groups; offer coaching

May the Forces Be with YOU

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