



Intermountain Consumer Preferences for Specialty Cut Flowers

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Today's Discussion

- Introduction and background
- Study focus
- Consumer survey
- Overview of results
- Consumer willingness to pay results
- Overall results discussion
- Conclusions/suggestions



Introduction and Background

- Americans buy an estimated 10 million cut flowers daily (2022)
 - USD \$6.43 billion industry sales annually
 - Per capita spending USD \$170.88 (2021)
- Cut flowers primarily sourced from Netherlands, Ecuador, Colombia, Kenya and Ethiopia
- Increased production in US Intermountain West
 - Utah - 18 farms in 2018, 221 in 2024
 - Smaller local farms and coops
 - Season extension and climate appropriate production techniques



Study Focus

- Examine consumer preferences and WTP for locally grown cut flowers in the Intermountain West
- Examine consumer cut flower purchase motivations, attitudes, and preferences
 - How might growers customize for target markets (what is your niche?)
- Examine the importance of specialty labeling programs (local, organic, etc.) on cut flower demand
 - What programs and characteristics are preferred?
 - If important, how might local growers serve this market?



Consumer Survey

- Survey conducted via Qualtrics late summer 2024
 - 607 respondents from Intermountain States
 - Utah, Nevada, Wyoming, Colorado, Idaho, Montana
- Questions related to...
 - Purchase habits
 - Attitudes and perceptions
 - Demographics
 - Label knowledge and familiarity
 - Willingness to pay - choice experiment and auction sections



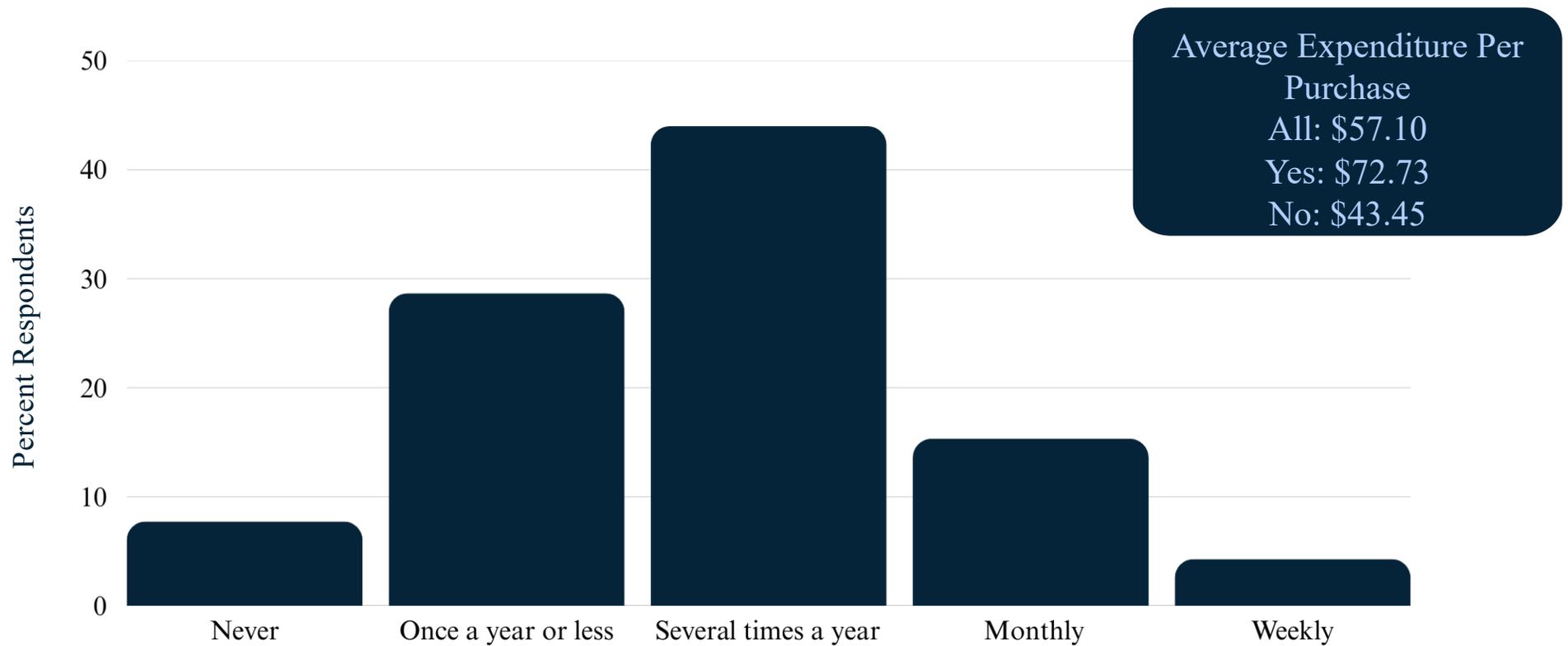
Respondent Demographics

- Qualtrics sampling set to reflect actual demographics
 - Education level
 - Age
 - Annual income
 - State of residence
- Sample skew
 - High percentage of women and married persons

Characteristic	Category	Sample (%)
Gender	Man	30.48%
	Woman	68.53%
	Non-binary	0.98%
Age	18-34 years	28.83%
	35-54 years	32.45%
	55-64 years	14.99%
	65 years and over	23.72%
Annual Household Income	Less than \$30,000	21.25%
	\$30,000-\$59,999	23.39%
	\$60,000-\$99,999	26.85%
	\$100,000-\$149,999	17.13%
	\$150,000 or more	11.37%
Marital Status	Single	39.70%
	Married	60.30%
Children in Household	Yes	34.43%
Education Level	Some high school	2.80%
	High school graduate or GED	28.67%
	Associate's degree/some college	28.5%
	Bachelor's degree	23.39%
	Graduate degree or higher	16.47%
State	Utah	21.58%
	Wyoming	3.46%
	Colorado	36.74%
	Idaho	12.19%
	Nevada	19.28%
	Montana	6.75%
Employment Status	Unemployed/Student/Retired	36.41%
	Part-time employed/Homemaker	22.90%
	Full-time employed	40.69%
Ethnicity	Black or African American	5.60%
	American Indian and Alaskan Native	1.15%
	Asian	2.14%
	Native Hawaiian and Other Pacific Islander	0.49%
	White	79.41%
	Hispanic or Latino	7.74%
	Other	0.99%
	Two or more races	2.47%

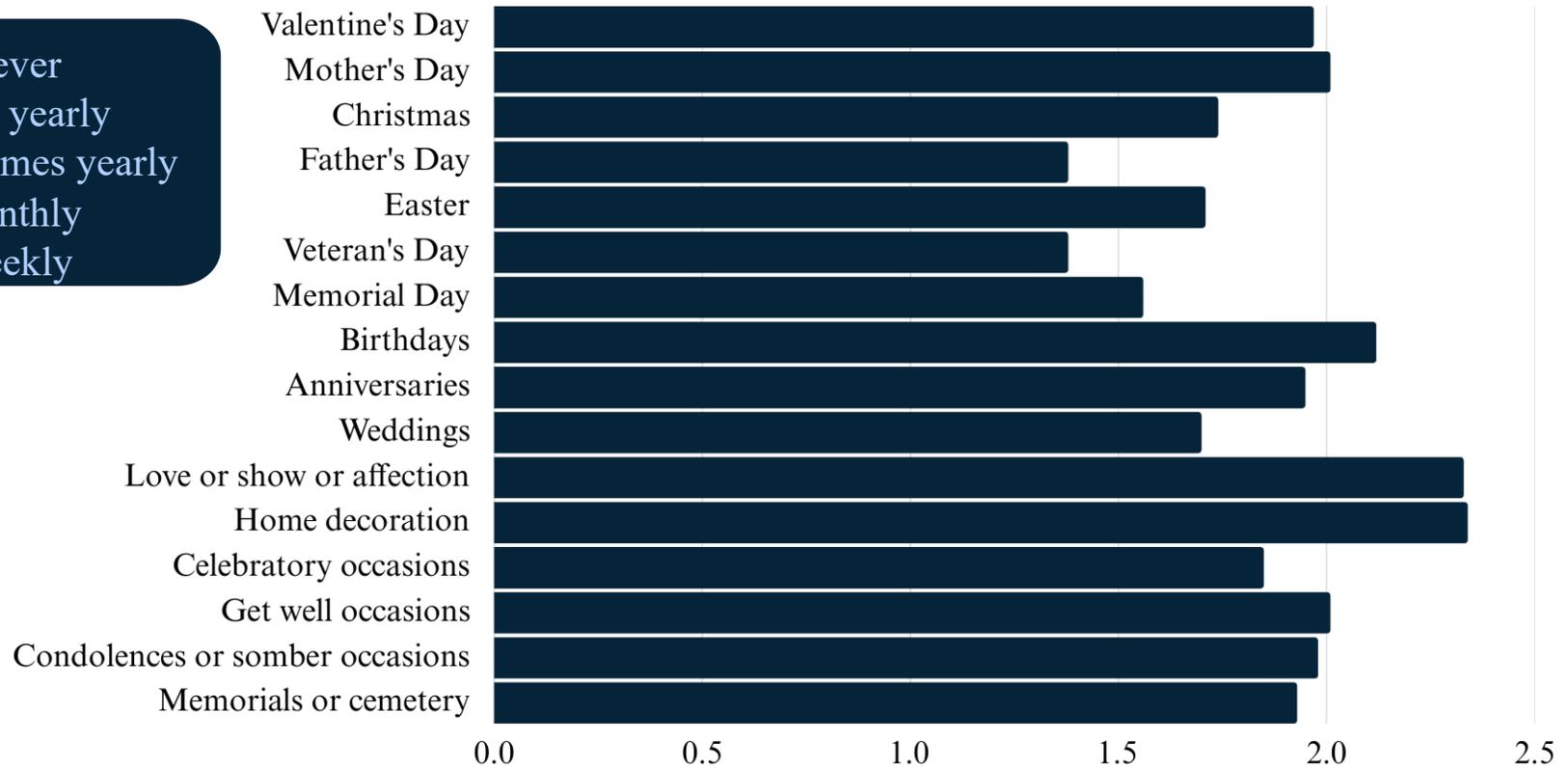


Cut Flower Purchase Frequency

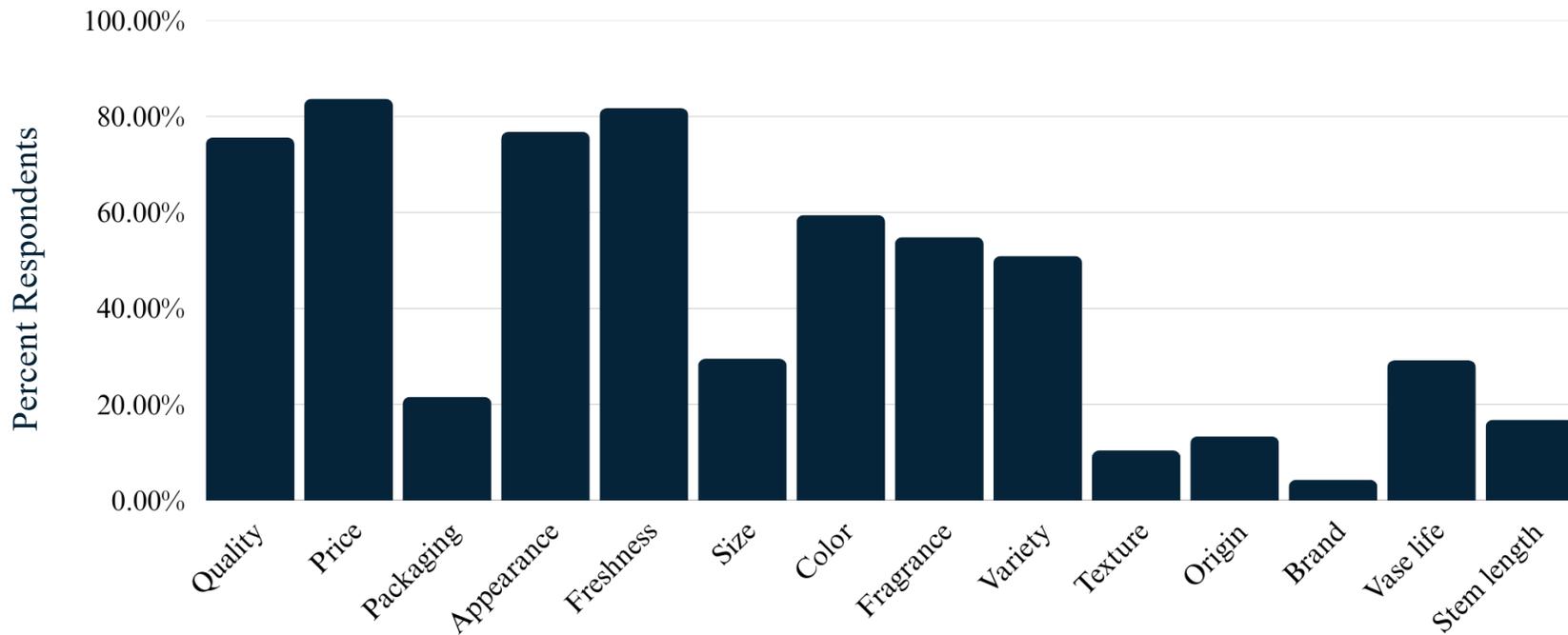


Cut Flower Purchase Reasons

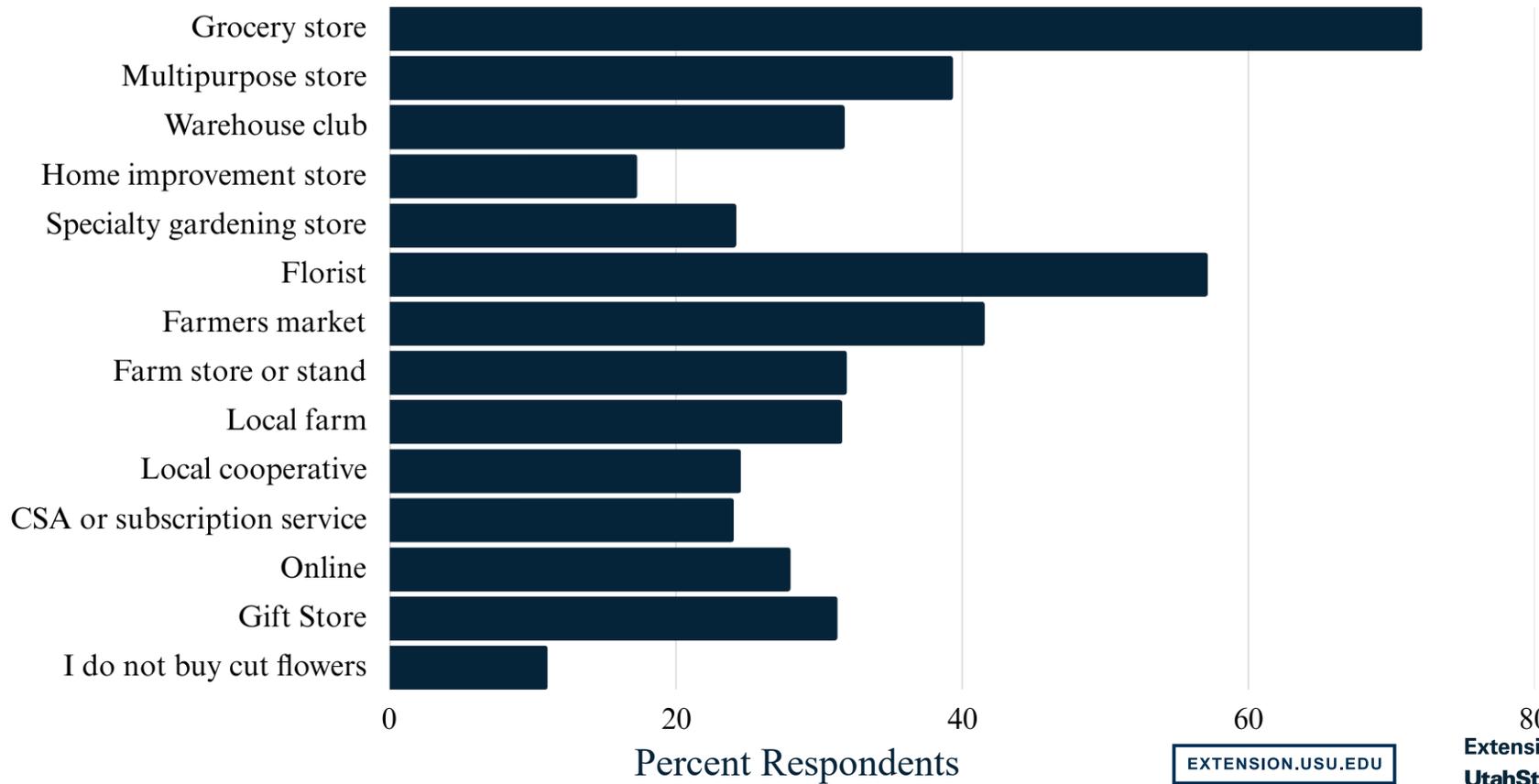
1 = Never
2 = Once yearly
3 = Several times yearly
4 = Monthly
5 = Weekly



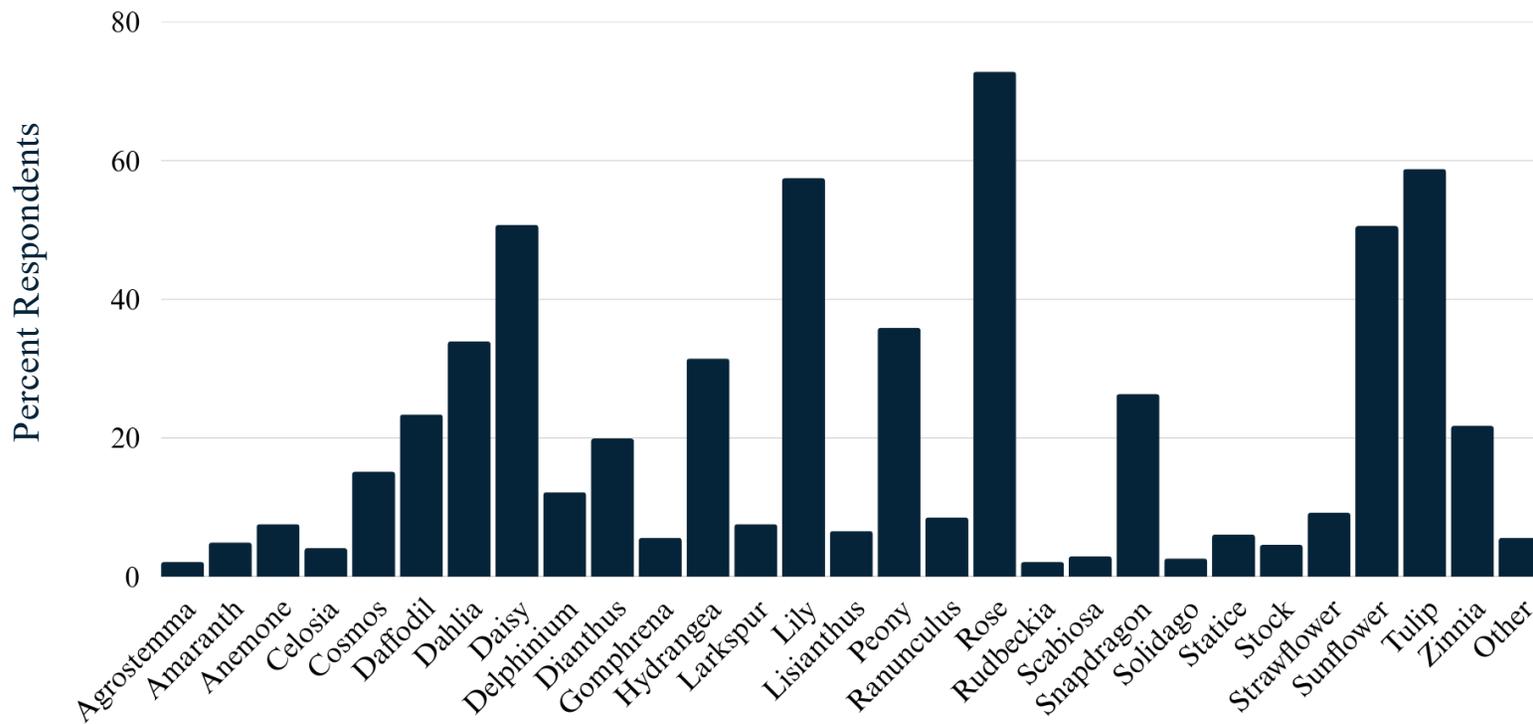
Factors Considered in Cut Flower Purchases



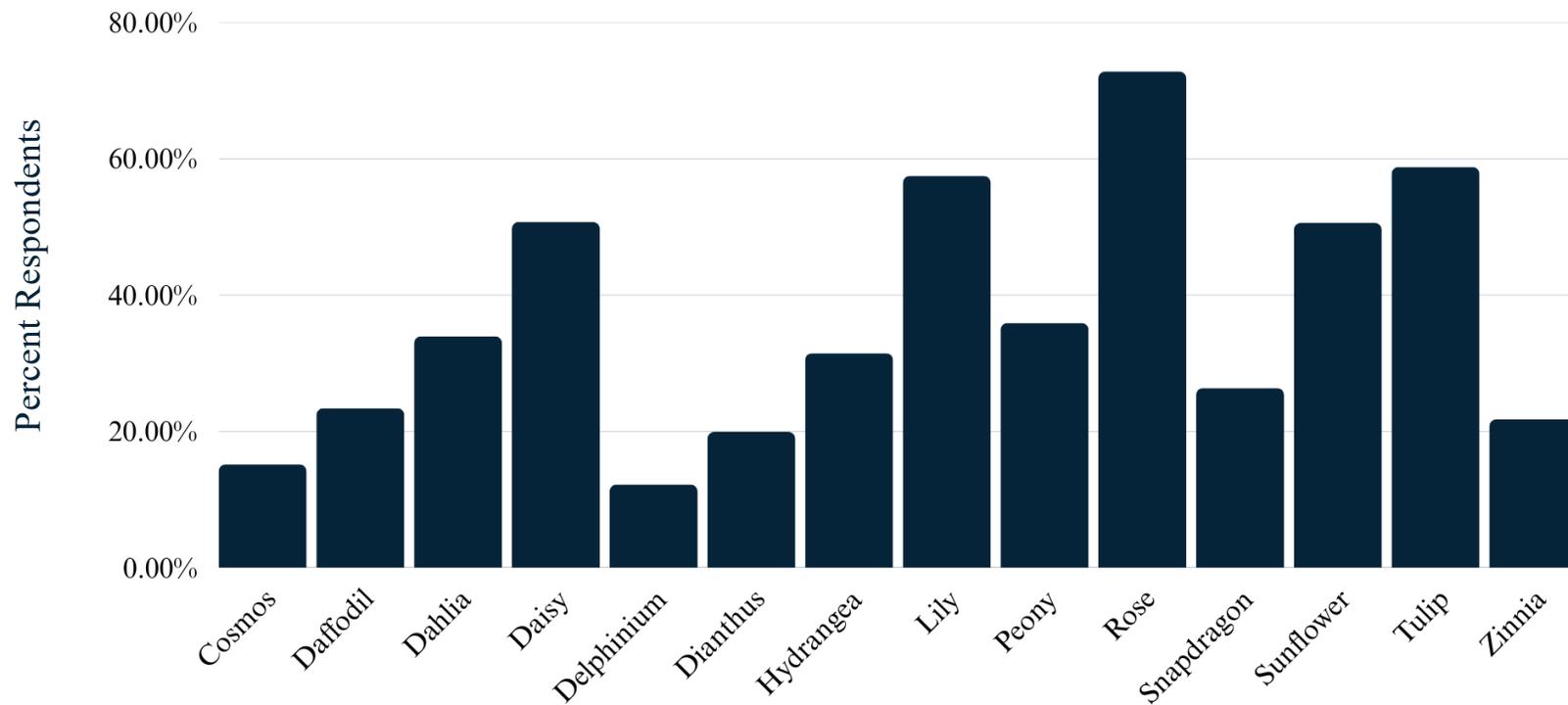
Cut Flower Purchase Locations



Preferred Cut Flower Varieties

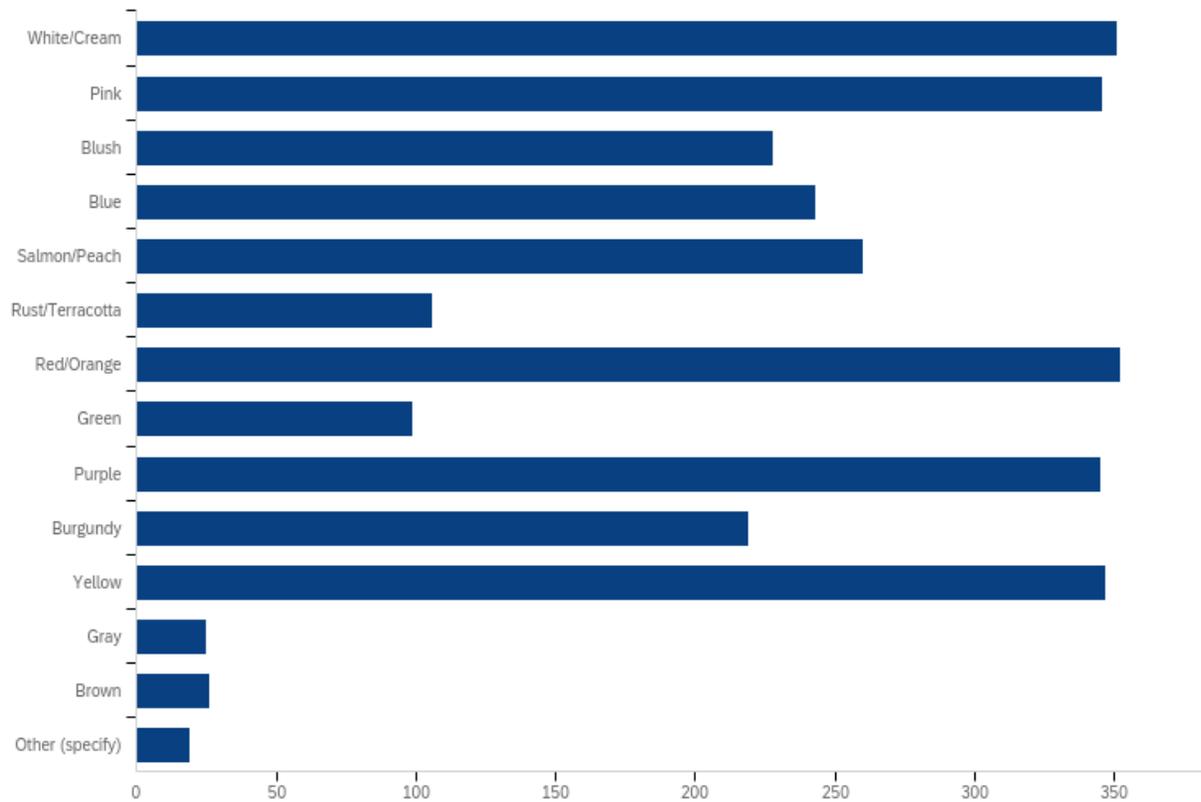


Preferred Cut Flower Varieties (at least 10% choose)



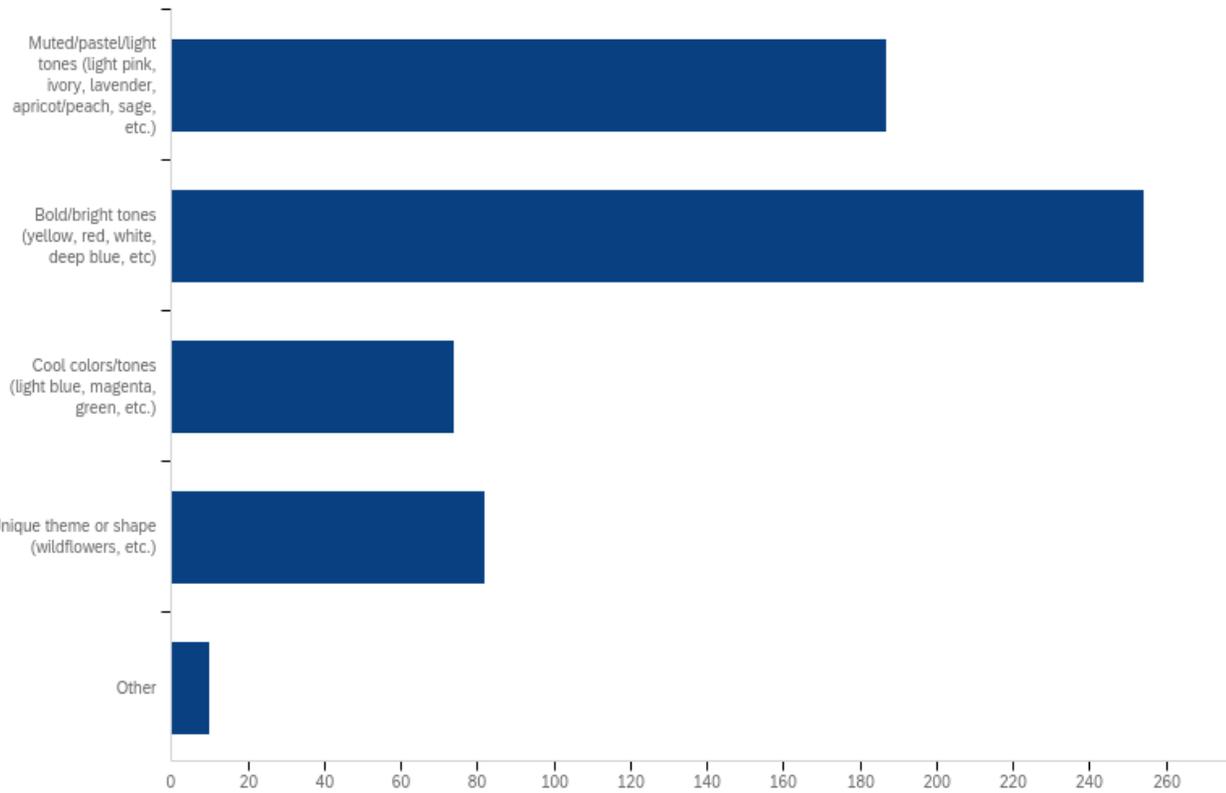
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Preferred Cut Flower Colors



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Preferred Bouquet Color Schemes



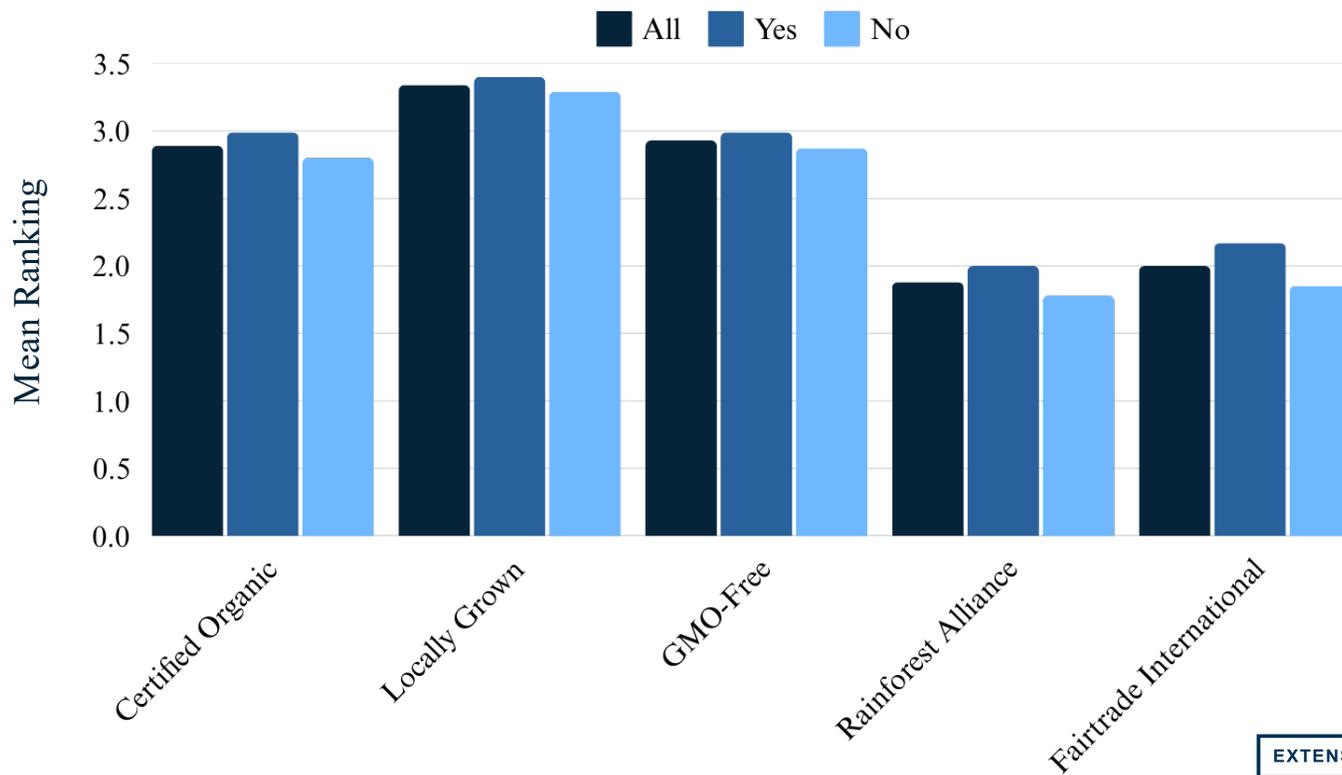
Respondent Perceptions/Attitudes

<u>Statement</u>	<u>Mean</u>
I have flowers at home	3.60
I grow my own flowers	3.05
I often buy flowers for gifts	3.29
I often buy flowers for myself	2.71
I enjoy smelling flowers	4.16
I enjoy food with flowers	2.92
I enjoy touching flowers	3.63
Flowers give me a sense of joy	4.08
Flowers give me a sense of peace	4.03
Flowers make me feel happy	4.21
I am interested in new or unique flowers	3.83
I am interested in uniquely colored flowers	4.01
I would buy more flowers if provided with a longevity/vase life guarantee	3.73
I understand how to care for fresh cut flowers	3.70
I know where to purchase locally grown flowers	3.47
I know where to purchase Certified Organic flowers	3.03

1 = Strongly Disagree
 2 = Disagree
 3 = Unsure
 4 = Agree
 5 = Strongly Agree

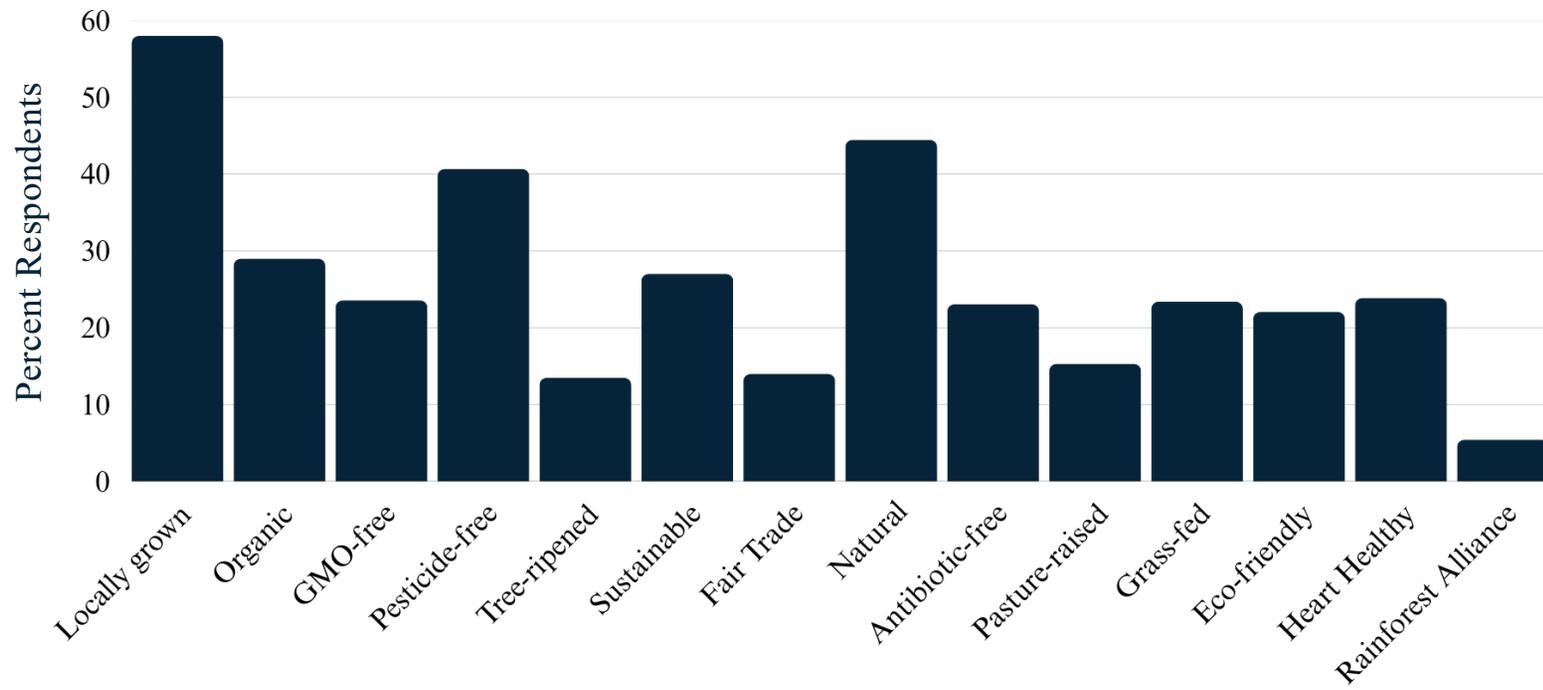


Familiarity with Specialty Labeling Programs



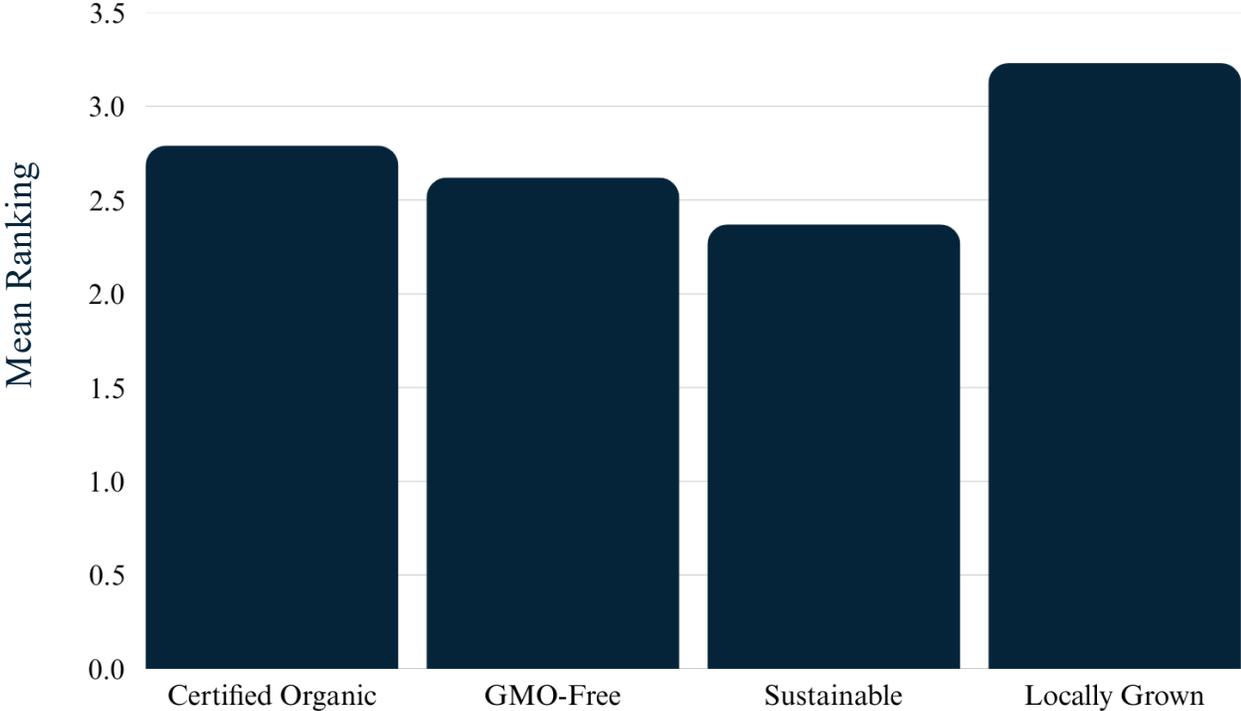
1 = Not familiar
2 = Somewhat familiar
3 = Moderately familiar
4 = Very familiar
5 = Extremely familiar

Specialty Labels Considered in Purchase Decisions



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Specialty Labeled Products Purchase Frequency



1 = Never
2 = Once yearly
3 = Several times yearly
4 = Monthly
5 = Weekly

Consumer Perceptions of Organic and Local Flowers

1 = Strongly Disagree
 2 = Disagree
 3 = Unsure
 4 = Agree
 5 = Strongly Agree

Statement	Mean Agreement	Difference
Organic flowers are fresher than non-organic flowers	3.28	-0.62
Organic flowers smell better than non-organic flowers	3.29	-0.27
Organic flowers are better quality than non-organic flowers	3.38	-0.21
Organic flowers last longer than non-organic flowers	3.19	-0.43
Organic flowers are better for the environment than non-organic flowers	3.61	0.06
Organic flowers are safer than non-organic flowers	3.50	--
Organic flowers are too expensive	3.49	0.46
The selection of organic flowers isn't good	3.05	0.06
Organic flowers are not important to me	3.07	0.33
Local flowers are fresher than non-local flowers	3.90	0.62
Local flowers smell better than non-local flowers	3.56	0.27
Local flowers are better quality than non-local flowers	3.59	0.21
Local flowers last longer than non-local flowers	3.62	0.43
Local flowers are better for the environment than non-local flowers	3.55	-0.06
Local flowers are better for my community than non-local flowers	3.89	--
Local flowers are too expensive	3.03	-0.46
The selection of local flowers isn't good	2.99	-0.06
Local flowers are not important to me	2.74	-0.33
Local flowers benefit local farmers	4.09	--



Consumer Willingness to Pay

- Respondent willingness to pay for cut flowers
 - One 18-22 stem wrapped bouquet
- Choice experiment and auction sections
- Labels considered
 - Certified Organic
 - Locally Grown
 - Rainforest Alliance Certified



Sample Choice Task

This choice involves a wrapped (no vase) mixed flower bouquet of 18-22 stems. Which of the following options would you choose based upon the listed price in dollars and the labels indicated?

Option 1 = \$31.99
Rainforest Alliance Certified
Locally Grown



Option 2 = \$15.99
Certified Organic
Locally Grown



None

Consumer Willingness to Pay

- Option to view label definitions prior to choice experiment and auction sections
 - Respondent response
 - Yes - 284, No – 323
- Definitions
 - Certified Organic: Organic certified products must be produced without the use of genetically modified organisms (GMOs), ionizing radiation, sewage sludge, and most synthetic fertilizers and pesticides. Organic products may or may not be produced locally, but they must be certified by a USDA-accredited certifying agent.
 - Locally Grown: Locally grown products have been transported less than 400 miles, or from within the state in which they were produced.
 - Rainforest Alliance: Rainforest Alliance certified flowers ensure safe working conditions while also protecting ecosystems and promoting water and soil conservation. Farms must meet comprehensive sustainable agriculture standards and ensure workers' rights to obtain certification. The three pillars of sustainability include economic, social, and environmental sustainability, and all are independently audited before certification is awarded. This is a commonly used sustainability labeling program.
 - Fairtrade International: Fairtrade International is a global organization that was founded in 1997. It ensures fair global trade and started certifying flowers in 2001. In addition to empowering workers and improving working conditions, Fairtrade ensures a lighter carbon footprint and the elimination of dangerous pesticides. This is a commonly used sustainability labeling program.

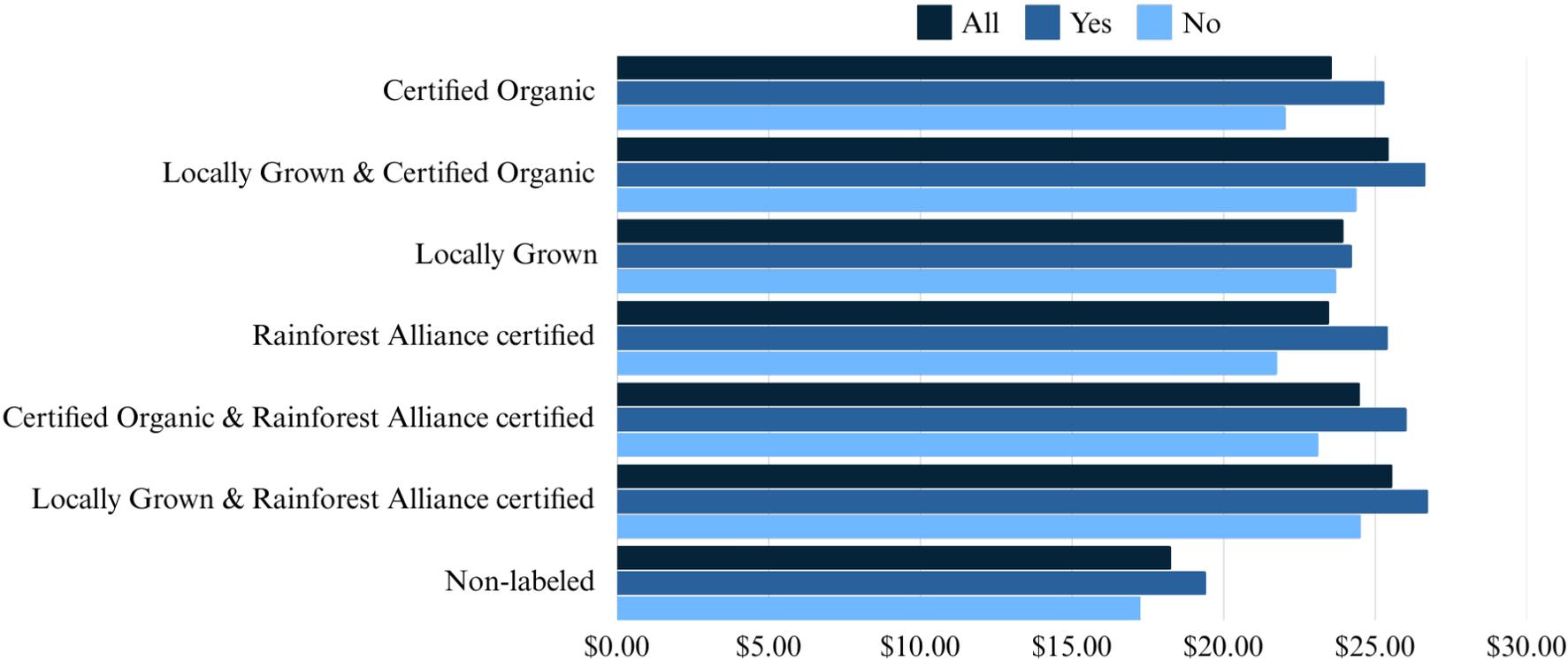


WTP Auction Results – Full Sample

<u>Label</u>	<u>Mean</u>	<u>Standard Deviation</u>
Certified Organic	\$23.57	\$9.94
Locally Grown and Certified Organic	\$25.45	\$9.85
Locally Grown	\$23.96	\$9.67
Rainforest Alliance Certified	\$23.48	\$9.77
Certified Organic and Rainforest Alliance Certified	\$24.50	\$9.84
Locally Grown and Rainforest Alliance Certified	\$25.57	\$9.44
Non-labeled	\$18.27	\$9.72



WTP Results by Information Group



Overall Results

- Key considerations in cut flowers are quality, price, appearance, and freshness
 - Brand, origin, texture, and stem length minimally considered
- Rose, lily, tulip, daisy, and sunflower preferred varieties
- White, pink, red/orange, purple, and yellow preferred colors
 - Stated interest in “unique” colors
- Bold/bright tones preferred for bouquets
 - Yellow, white, red, deep blue, etc....
- Grocery stores and florists the most common purchase locations
 - Farmers markets the most common DTC market





Overall Results

- Respondents enjoy smelling flowers, and they give them a sense of peace, joy, and make them feel happy
- Respondents most familiar with locally grown labels
 - Rainforest Alliance and Fair Trade least known
- Those who received label definitions are willing to pay more for labeled cut flowers
- Locally grown had the highest WTP for a single label (organic close behind)
 - \$5.50 premium over non labeled bouquet
 - Local flowers last longer, fresher, better quality, benefit local farms...
 - But, perceived organic flowers as more environmentally friendly
- Label combinations of locally grown and Rainforest Alliance had the highest WTP
 - \$7.20 premium over non labeled bouquet

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Conclusions/Suggestions

- Large interest in local flowers – 46% of sample wanted more info and were willing to pay more....
 - Yes group willing to pay \$2 premium over No group for non labeled bouquet
- Next to quality and appearance, locally grown and organic labels provide opportunity for premiums (higher pricing!)
- Know you market (who are they, where do they shop and why?)
 - Sales location can make a large difference - grocery stores and florists most common location by far
 - However, your target market may be purchasing elsewhere (FM, farm store, gift shop, etc.)
- Highlight sensory aspects of the flowers (smell, colors, etc.) when interaction with customers





**Questions?
Thank you**

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