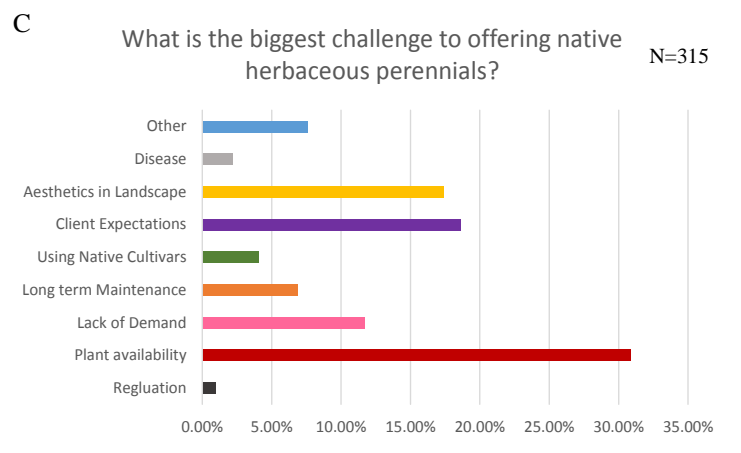
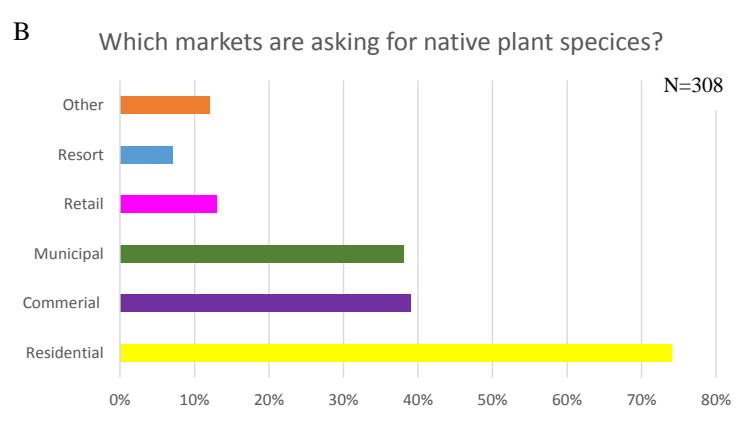
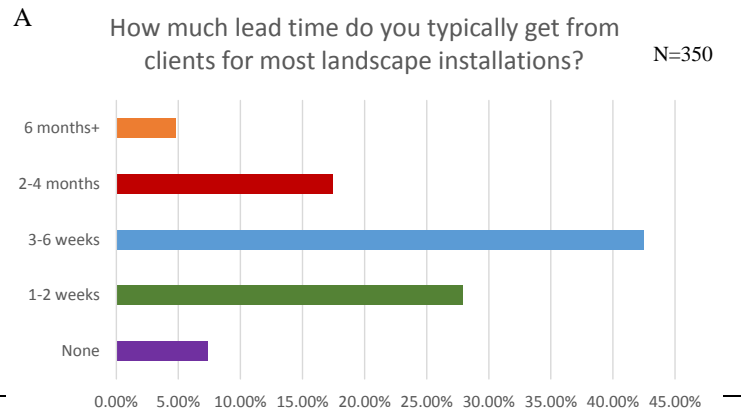


# Ball 2016 Landscape Contractors Survey

- Survey responses from 359 U.S landscape trade. **Landscape contractors** (53.1%), landscape architect (8.3%), landscape designer/engineer (37.2%), and other (24.9%)
- The top three methods landscapers find new plants is their **growers** (60%), trade shows (44.6%), and looking at other landscapes (41.1%).
- [Graph A]: Landscape contractors receive **3-6 weeks of lead time** from clients for most landscape installations (42.6%). They influence customers to try new plants using **visuals, tested recommendations, and education**.
- 45.4% of landscape contractors say the most important factor that contributes to customer renewal rates is **attention to detail** followed by customer service (14.3%) and product quality (12.4%).
- [Graph B]: **Residential** (74%)\_customers are the main market asking about native plant species, and 51.6% of landscape contractors saw natives as an **increasing** opportunity.
- [Graph C]: Landscape contractors say the **biggest challenge** when offering natives is **plant availability**.

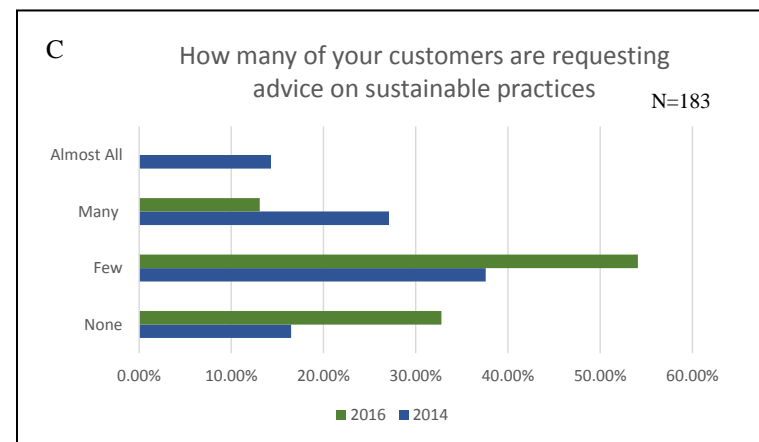
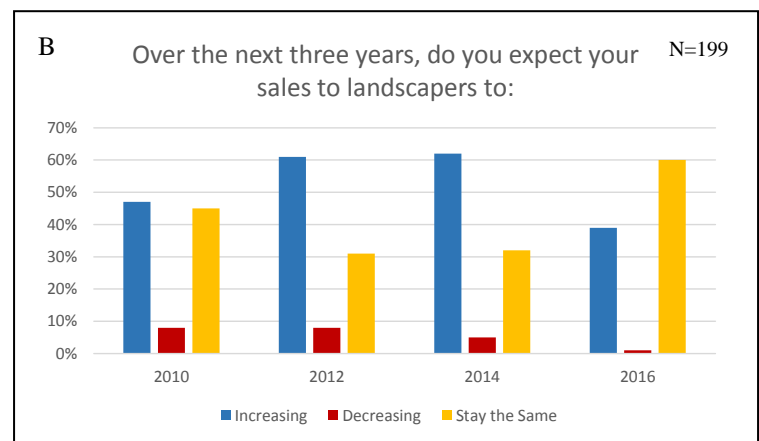
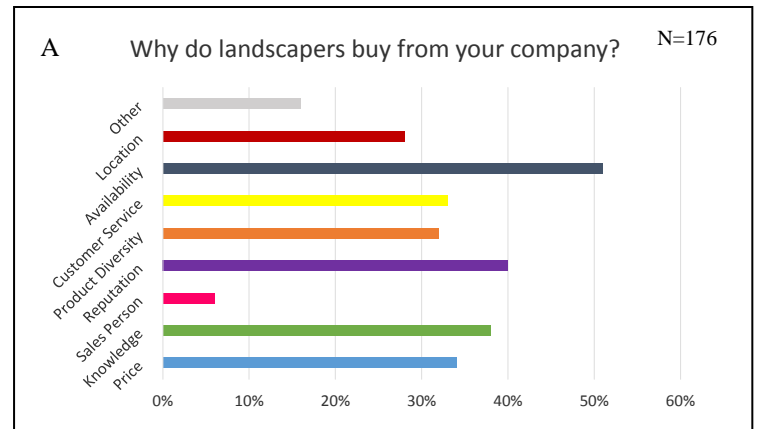


## **CONCLUSIONS:**

- ✓ Attention to detail in landscapes leads to high customer renewal rates
- ✓ Native herbaceous perennials are an increasing opportunity for landscape contractors
- ✓ There is a lack of communication between landscapers and growers on timing

# Ball 2016 Landscape Grower\* Survey

- Survey responses from 163 landscape growers selling to the landscaper trade. Around 10% of these growers report that **60%-100% of their sales** are to landscapers
- [Graph A]: **Availability** (51.1%) **Reputation** (40.3%) and **Knowledge/ Experience** (38.1%) are the top three reasons landscapers buy from growers.
- [Graph B]: From 2010-2014 growers have said their sales to landscapers are going to increase. In 2016, 60% of growers said they expect sales to **stay the same or increasing**
- 79.8% of grower customers, who are trying to achieve a more sustainable landscape indicated that customers are interested in **drought tolerant plants**.
- From 2010-2014 customers have been asking for: low maintenance landscapes and shifting from annuals to perennials. In 2016, they are interested in **drought tolerant plants (80%), buying locally grown products (60%), and using plants to attract pollinators (56%)**.
- [Graph C]: 63% say their customers are asking about **native herbaceous perennials**. A few of these customers are asking for advice on sustainable landscape practices (up 17% since 2014).



## **CONCLUSIONS:**

- ✓ Drought tolerance has been a concern for customers since 2010
- ✓ There is a growing opportunity for native herbaceous perennials
- ✓ Majority of landscape growers indicated sales will grow or stay the same in the next three years. Those indicating increase in sales are getting more customers.