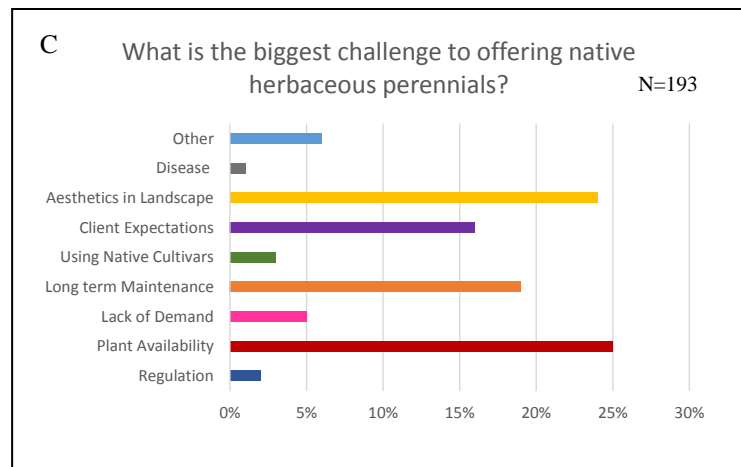
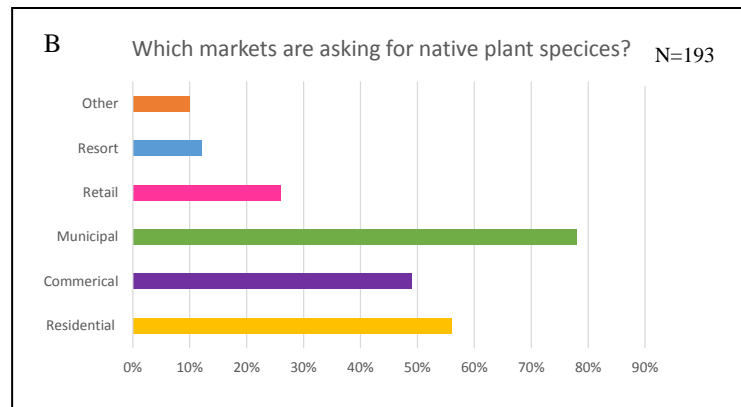
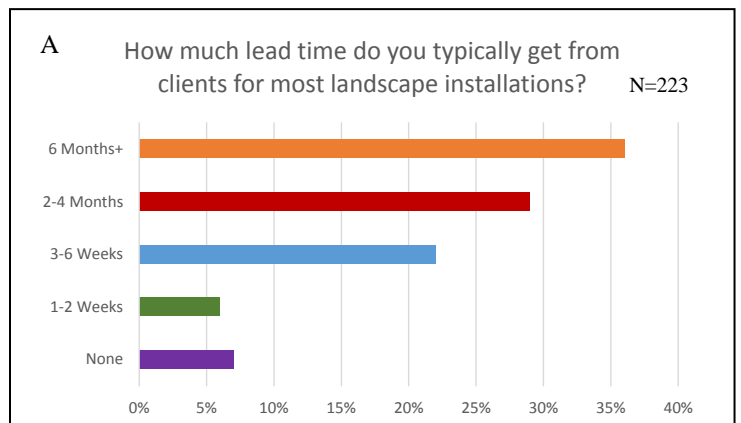


# Ball 2016 Landscape Architect Survey

- Survey responses from 240 U.S landscape trade. **Landscape architects** (72.9%), landscape contractors (5.4%), landscape designers (26.7%) and other (4.6%).
- The top three ways landscape architects find new plants is by **looking at other landscape designs** (53.3%), google (49.2%), and their growers (44.6%)
- [Graph A]: Landscape architects usually get **6 months+** (36.2%) lead time from clients for most landscape installations.
- 73% of landscape architects say they influence their customers to try new plants by using **visuals/pictures, explaining benefits, and trust.**
- [Graph B]: 77.7% of landscape architects say **municipal/government** markets are asking about native plant species
- 34.2% of landscape architects say the most important factor that contributes to customer renewal rates is **attention to detail** followed by product quality (20.8%) and plant performance (13.9%).
- [Graph C]: Landscape architects say the **biggest challenge** when offering natives is **plant availability.**

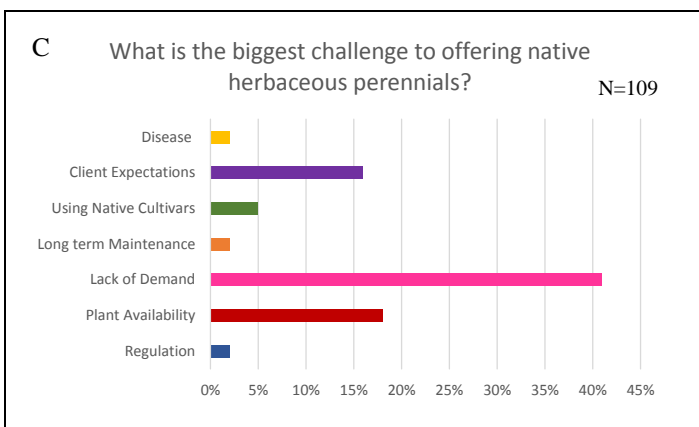
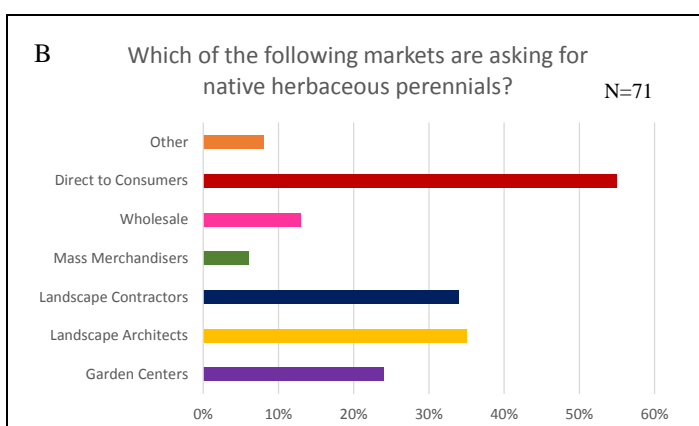
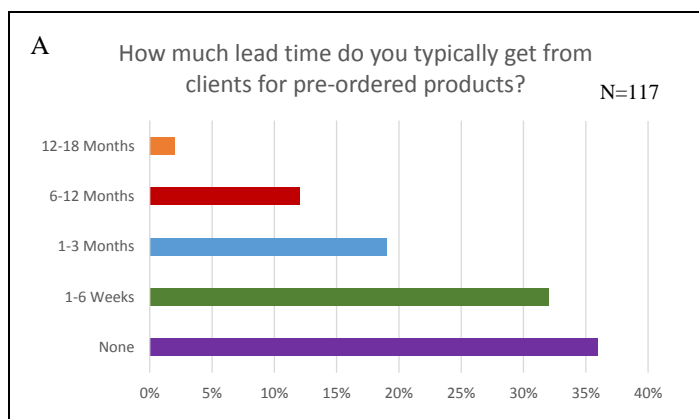


## CONCLUSIONS:

- ✓ Landscape architects look at other landscape designs to find new plants
- ✓ Municipal and Government markets are an opportunity for native herbaceous perennials
- ✓ There is a lack of communication between landscapers and nursery growers on timing

# Ball 2016 Nursery Grower\* Survey

- Survey responses from 165 nursery growers. 58.3% sell direct to customers, 51.5% sell to landscape contractors, and 42.9% sell to independent garden centers
- Majority of nursery growers say **perennials are profitable** (59.7%) whereas annuals are most profitable (31.1%) and native perennials are somewhat profitable (26.9%).
- 47.4% of nursery growers say the North American landscape market will be **increasing** in the next three years.
- [Graph A]: 35.9% of nursery growers receive **no lead time** from clients for pre-ordered products.
- 56.3% of nursery growers offer native herbaceous perennials, but when they think of the word “native” they primarily think **weedy or hardy**
- [Graph B]: Nursery growers say the markets that are asking for native herbaceous perennials are **direct to consumer** (54.9%), landscape contractors (33.8%) and landscape architects (35.2%).
- Nursery growers say the visual appeal of native herbaceous perennials has **helped increase** the demand for natives or had **no impact** on the demand for natives.
- [Graph C]: Nursery growers say biggest challenge when offering native herbaceous perennials is the **lack of consistent demand**



## **CONCLUSIONS:**

- ✓ Majority of Nursery growers indicated landscape sales are growing
- ✓ Majority of nurseries offer natives
- ✓ Aesthetics are not necessarily decreasing the demand for natives. The challenge for nursery growers is in the lack of consistent demand for natives.