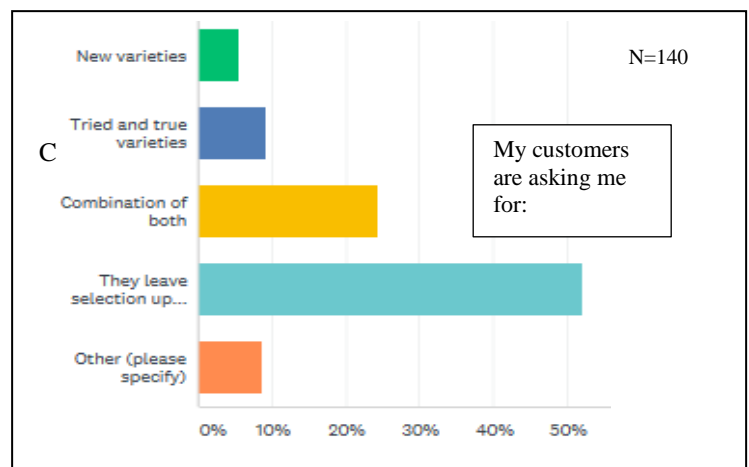
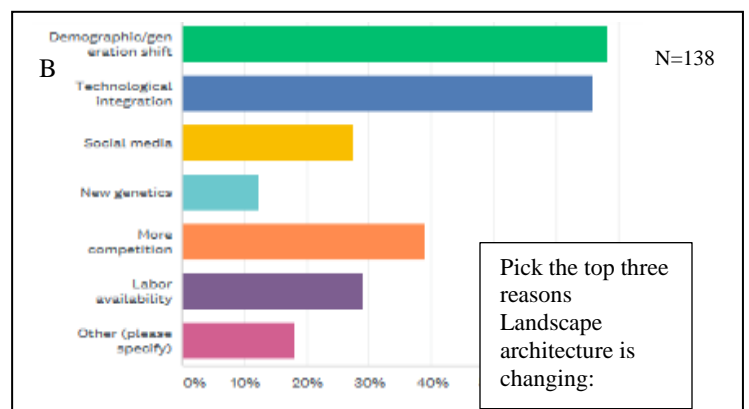
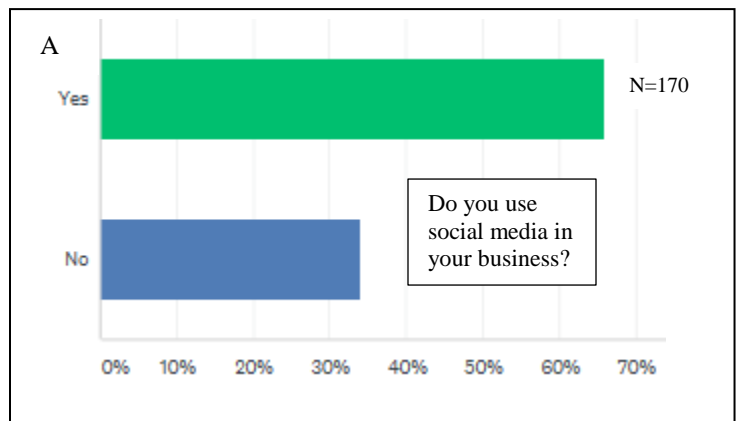


# Ball 2018 Landscape Architect Survey

- Results indicated that **Native plants** are the **fastest increasing** plant category in Landscape architecture followed by **perennials** and **succulents**. The category with the **greatest decrease is annuals**.
- The top four ways landscape architects find new plants are: **google/internet search [63%]**, **Looking at other landscapes [58%]**, **their grower [43%]**, and **trade shows [38%]**.
- [Graph A]: **66%** of the **170** respondents use social media in their business. The majority of them use social media to **connect with customers** followed by **advertising**.
- The four most important things Landscape architects look for in a new variety are: **Availability [78%]**, **proven trial performance [66%]**, **drought tolerance [57%]**, and **aesthetic appeal [56%]**.
- [Graph B]: The top three reasons Landscape architecture is changing are: **Demographic shift [68%]**, **Technological integration [65%]**, and **more competition [39%]**.
- **70%** of Landscape architects said that they influence their customers to try new plants based on their recommendations.
- [Graph C]: **The majority of customers [52%]** leave selection of new varieties vs. tried and true varieties up to the architect.

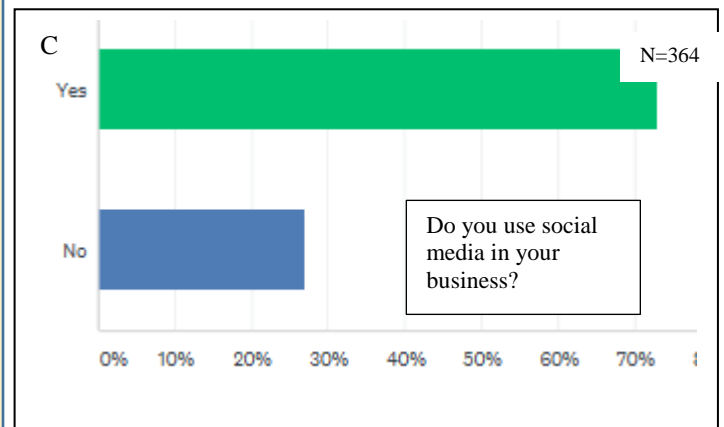
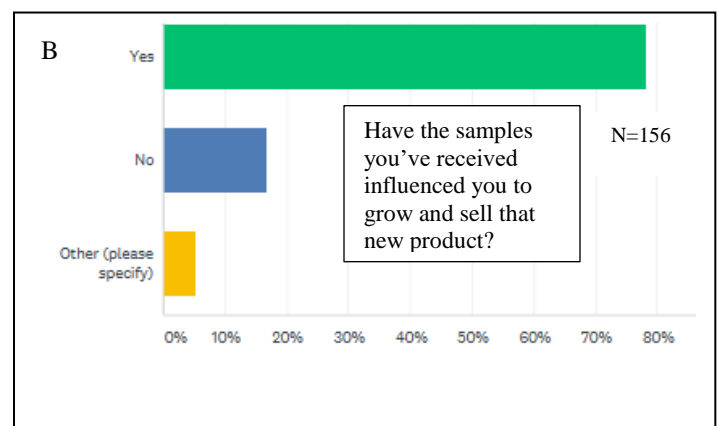
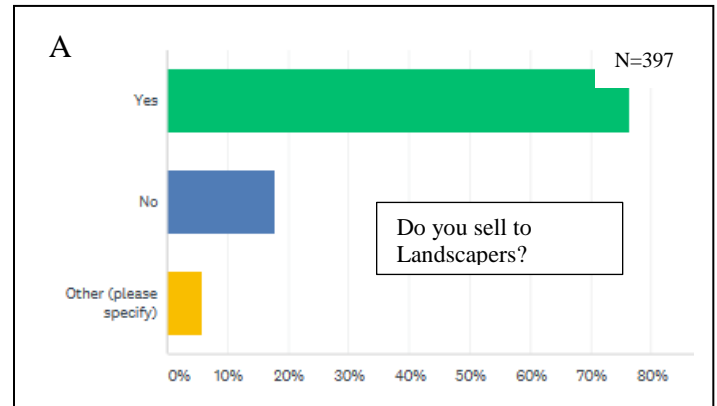


## CONCLUSIONS:

- ✓ The internet is an important source of new plant information to Landscape architects
- ✓ Availability is the most important factor when considering whether or not to use a new variety
- ✓ Customers place a lot of trust in their architect when it comes to plant selection.

# Ball 2018 Nursery Grower\* Survey

- According to the **388 nursery growers**, the three **most profitable plants** for their business are: **Perennials [65%], Shrubs [54%], and Annuals [45%]**.
- **31%** of the **388 respondents** said that **Catalogs are their primary source** for finding out about new varieties available. **16%** said that **their sales person** is their primary source of new variety information.
- In 2016, **47.4%** of nursery growers say the North American landscape market will be **increasing** in the next three years. In this years' survey **78%** said that their sales will be **increasing** in the next three years.
- Graph A]: Of the **397 Nursery growers** who answered the question, **76% sell to the Landscape trade**. Compared to the **60% of greenhouse growers** surveyed who said they sell to the landscape trade.
- [Graph B]: Of the **148 nursery growers** who have received samples of new products from Ball in the past, **78%** indicated that the **free samples influenced them to start growing and selling that product to customers**. The majority of Nursery growers indicated that they have not received samples from Ball.
- The top three reasons for increasing sales were; **more customers [58%], increases with existing customers [58%], and providing new varieties [47%]**.
- [Graph C]: **[73%]** of Nursery Growers indicated that they use social media in their business. The majority use it for connecting with customers.



## CONCLUSIONS:

- ✓ The number of nursery growers who believe their sales will increase has gone up a great deal since 2016. Overall industry confidence is trending upwards.
- ✓ Receiving samples is important in the decision of whether or not to begin growing and selling a new variety.
- ✓ More nursery's sell to Landscapers as a whole than actual greenhouse/Landscape growers do.