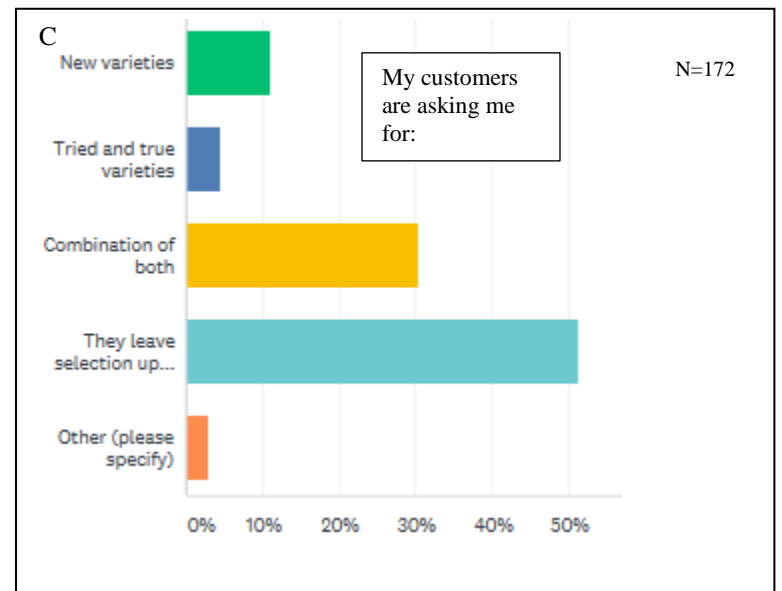
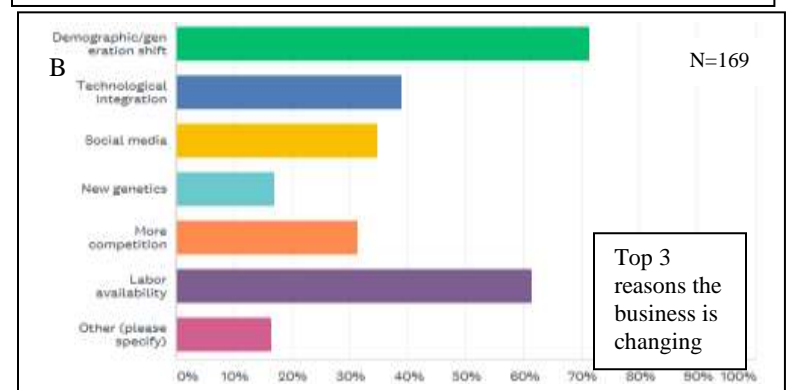
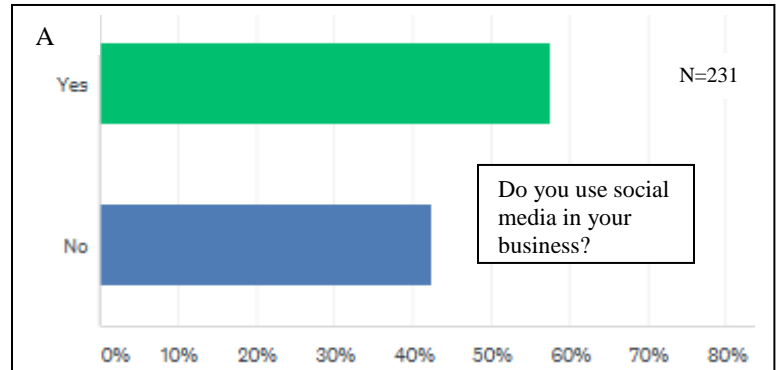


Ball 2018 Landscape Contractors Survey

- [54%] of Contractors subscribe to Thrive; Ball landscaping's online newsletter. [22%] of landscape growers subscribe.
- The top four methods landscapers use to find new plants are; their growers (66%), trade shows (55.81%), and looking at other landscapes (49.42%).
- [Graph A]: 57% of Landscape Contractors use social media in their business. They primarily [80%] for connecting with customers. 52% use it for advertising their business.
- The four most important things Landscapers look for in a new variety are: **Proven trial performance, aesthetic appeal** of the plant, **availability**, and **disease resistance**
- [Graph B]: 71% of Landscapers say **Demographic shift** is the biggest reason the industry is changing followed by **Labor Availability** at 61% and **Technological Integration** at 39%.
- [Graph C]: 51% of Landscape Contractors say their customers leave selection of new varieties up to them. 46% of LS growers say they primarily learn about new varieties through catalogs, 16% learn through their salesperson, and 13% learn through trade shows.

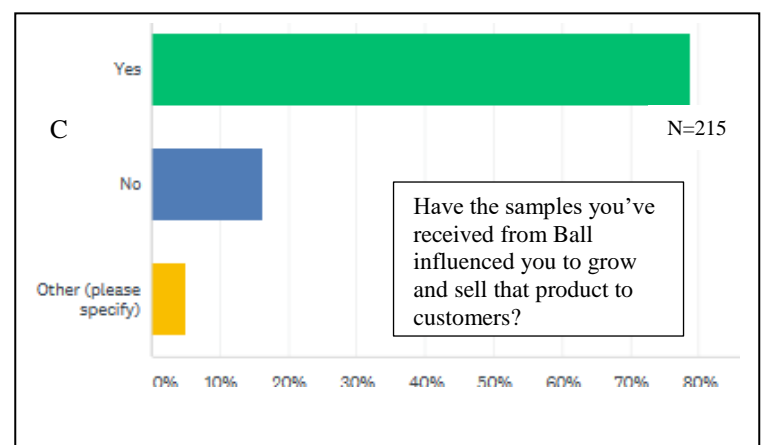
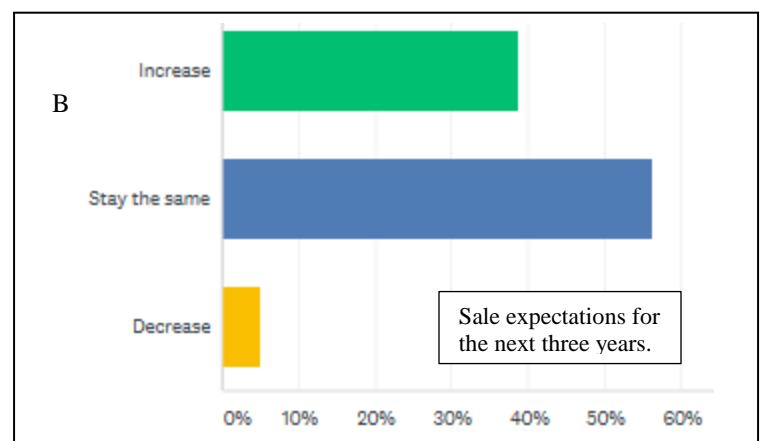
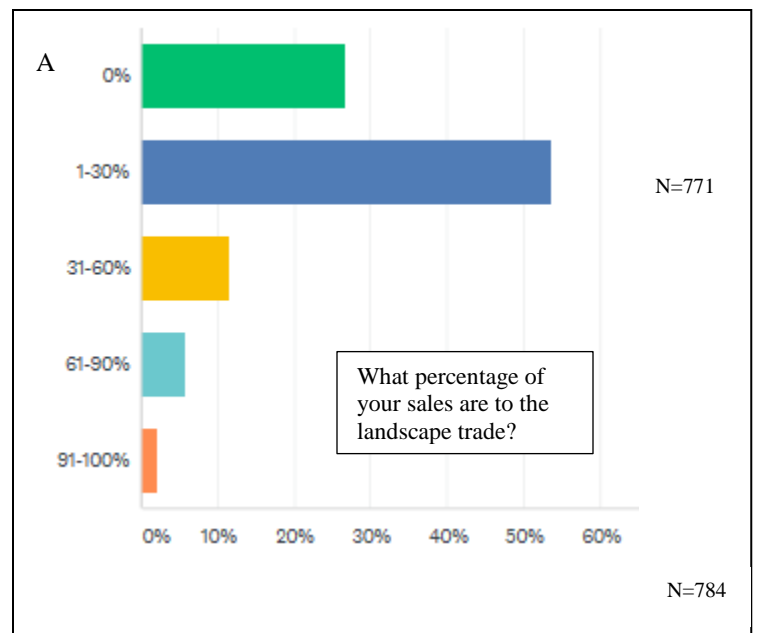


CONCLUSIONS:

- ✓ The majority of Landscape Contractors are using social media.
- ✓ Demographic shift is the biggest source of industry change right now.
- ✓ Customers trust their Landscapers to make decisions on what varieties of plants to purchase, Landscapers trust their grower's to tell them what varieties to buy. Growers make decisions with catalogs.

Ball 2018 Landscape Grower Survey

- Of **840** Landscape Growers surveyed, **60%** sell to Landscapers. This survey had a 10.8% rate of return and was sent to 7,700 growers.
- [Graph A]: **53% of growers** say that they sell **between 1 and 30%** of their plants to the landscape trade.
- [Graph B]: The majority of growers are expecting their business to stay the same over the next three years. Those who are reporting increased business say it is primarily because of an increased amount of customers and increased sales with existing customers.
- **86%** of growers say **annuals** are the most profitable category of plants for their business. The top three categories are: annuals, perennials, and shrubs.
- The **four most** important things growers look for when deciding whether or not to begin growing a new variety are: **Proven trial performance, plant aesthetics, availability, and disease resistance**
- [Graph C]: Of the **215 growers** who have received samples from Ball, **78%** said that the sample led to them producing and selling that product to customers. The majority of growers did not indicate that they have received samples before.
- Succulents are the fastest increasing plant category for Landscape Growers. Mums are fastest decreasing category.



CONCLUSIONS:

- ✓ The majority of growers sell to landscapers in some capacity.
- ✓ Growers are feeling extremely confident about their upcoming business opportunities.
- ✓ Samples have a significant effect on the adoption of new varieties by growers who receive them.