

Preliminary Changes in COVID-19 Purchasing Habits of Southeastern US Green Industry Consumers

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Introduction

Historically, plant purchases frequently occur in physical retail centers (e.g., mass merchandisers, garden centers, etc.). The COVID-19 pandemic resulted in the adoption of retail measures to reduce disease transmission and spread, including stay-at-home/lockdown orders, retail store closures, limited retail occupancy and social distancing. Consequently, consumers' ability to shop for products in-store was impacted and opened the opportunity to use nontraditional sales methods. This report provides a summary of consumers' perceived plant purchasing behavior in the southeast U.S. Data was collected using an online survey which was conducted during the last week of July 2020. Responses were collected from an online panel of consumers in eight southeast states. A total of 670 consumers from Alabama (n=67), Florida (n=121), Georgia (n=168), Louisiana (n=37), Mississippi (n=25), North Carolina (n=63), South Carolina (n=120) and Tennessee (n=69) completed the survey. The survey addressed consumers' shopping behavior for ornamental plants, how those behaviors changed during the pandemic and their anticipated shopping behavior after the pandemic.

Changes in Shopping Patterns

Compared to before the pandemic, the way consumers purchased plants changed during the Coronavirus pandemic (Table 1). This trend was especially apparent from state to state (Figure 1). Notably, both curbside and online purchasing increased (Table 1). On average, curbside pickup increased by 4.7 percent, while online purchasing increased by 4 percent. However, the change varied considerably by state and by the type of retail outlet. For instance, Alabama saw a 6 percent increase in curbside sales, with only a 2 percent increase online. Florida saw a 7 percent increase in curbside and a 10 percent increase in purchases online. Tennessee saw the largest change with a nearly 17 percent increase in curbside sales and an 11 percent increase in online purchases. Georgia, however, experienced relatively little change in shopping patterns.

Table 1. Changes in Shopping Habits

Location	Change in Plant Purchasing During the Pandemic Compared to Pre-Pandemic								
	Overall	Alabama	Florida	Georgia	Louisiana	Mississippi	North Carolina	South Carolina	Tennessee
Number of Participants (n)	670	67	121	168	37	25	63	120	69
In-Store - Curbside at Mass Merchandiser (e.g., Walmart, Target)	4.9%	3.4%	7.6%	0.6%	10.6%	-8.7%	2.6%	1.8%	16.6%
In-Store - Curbside at Box Store (e.g., Home Depot, Lowe's)	6.7%	10.2%	11.6%	0.4%	-0.6%	-0.1%	6.5%	1.5%	17.4%
In-Store - Curbside at Independent Garden Center	7.3%	15.9%	6.4%	2.6%	6.2%	-8.0%	16.8%	1.0%	17.3%
In-Store - Curbside at Other Retailer	-0.3%	8.0%	10.3%	1.8%	17.3%	-9.3%	0.2%	1.9%	22.6%
Online at Mass Merchandiser (e.g., Walmart, Target)	7.1%	3.8%	11.9%	3.2%	11.5%	-15.1%	10.4%	1.1%	7.4%
Online at Box Store (e.g., Home Depot, Lowe's)	6.0%	1.7%	11.1%	-0.8%	12.4%	-14.5%	7.8%	-4.4%	5.3%
Online at Independent Garden Center	3.5%	-4.2%	1.2%	-6.8%	14.4%	-12.7%	0.9%	-6.1%	16.0%
Online at Other Retailer	-0.3%	-7.2%	5.6%	-5.1%	11.0%	-10.3%	3.8%	-8.6%	8.5%
Average Curbside Change	4.7%	6.3%	6.7%	-0.8%	7.6%	-7.4%	6.7%	-0.4%	16.8%
Average Online Change	4.1%	1.6%	9.7%	-0.2%	13.1%	-12.3%	5.5%	-2.5%	10.9%

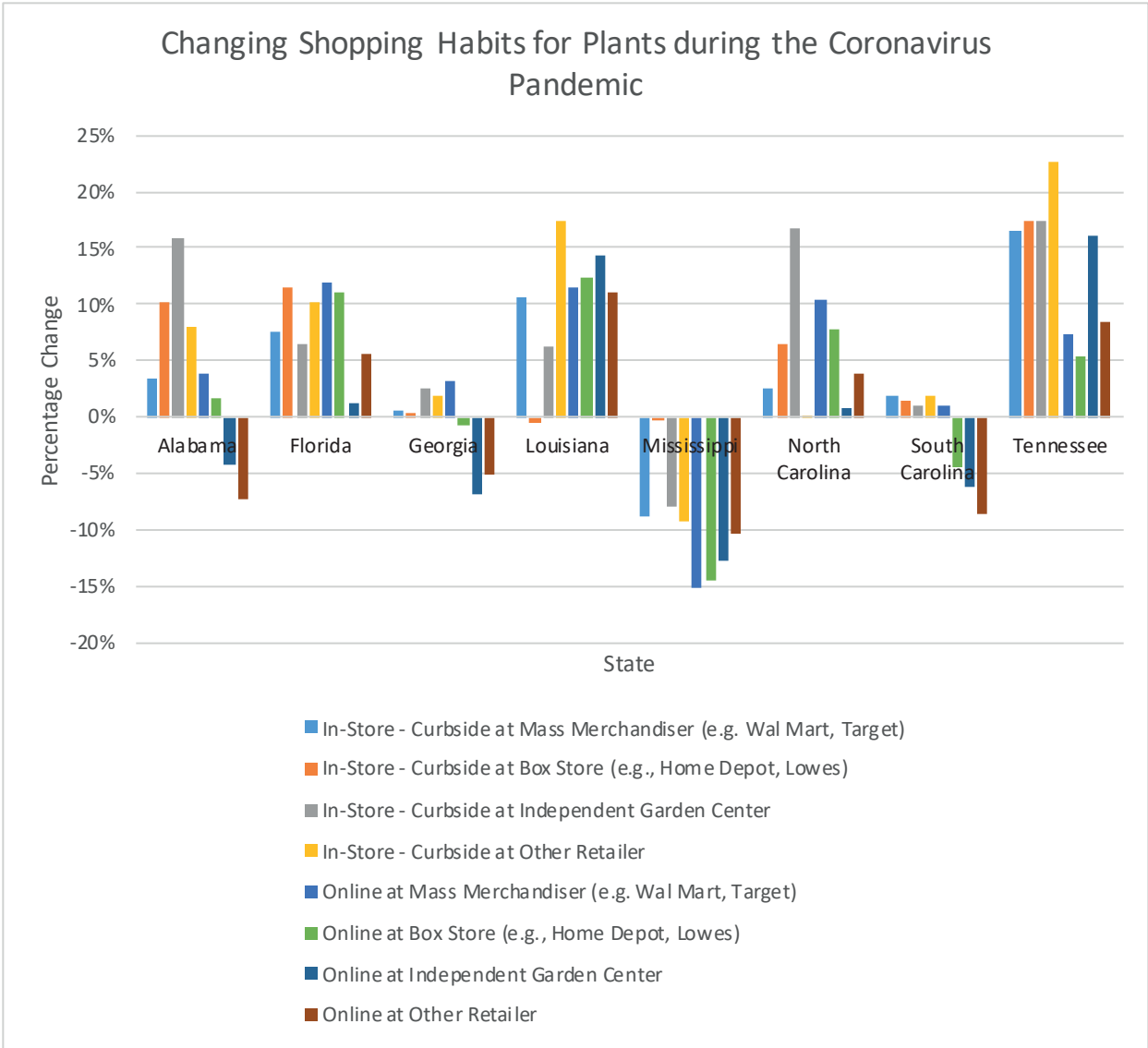


Figure 1. Changing Shopping Habits for Plants During the Coronavirus Pandemic.

Post-COVID-19 Shopping Patterns Overall

Though making quick recommendations to industry stakeholders is important, it is vital to realize that post-COVID-19 purchasing behaviors may or may not resemble COVID-19 purchasing patterns or pre-COVID-19 purchasing patterns. Thereby, before producers and retailers expend resources on making changes in anticipation of the post-COVID-19 world, they should understand how consumers envision their future purchasing habits.

For instance, 57 percent of surveyed respondents perceived themselves as going back to their pre-pandemic purchasing habits (Table 2; Figure 1). This ranges from 48 percent in Alabama to 68 percent in Tennessee. Approximately 15-20 percent of consumers surveyed indicated that even post-pandemic, they plan on maintaining the same purchasing patterns they displayed during the pandemic. The remaining 20-30 percent of consumers perceived their purchasing habits changing, but their post-pandemic behavior would include a mix of pandemic behaviors and pre-pandemic behaviors.

As for plant purchasing in general, almost two-thirds of the sampled consumers perceived that their plant purchasing behavior would return to pre-pandemic levels after the pandemic ends. However, 25-30 percent perceived that they would maintain their pandemic level of plant purchasing.

Table 2. Anticipated Changes in the Purchasing of Plants After the Coronavirus Pandemic

Purchase Plants	# of Obs.	Purchasing Habits After Pandemic (% of Sample)		
		Similar to Before Pandemic	Similar to During Pandemic	Combination Before/During Pandemic
Alabama	67	48%	20%	31%
Florida	121	53%	17%	30%
Georgia	168	58%	20%	22%
Louisiana	37	49%	22%	30%
Mississippi	25	67%	17%	17%
North Carolina	63	60%	17%	23%
South Carolina	120	58%	19%	23%
Tennessee	69	68%	14%	18%
Overall	670	57%	18%	25%

Post-COVID-19 Shopping Patterns by Changes in Shopping Behaviors During Initial COVID-19 Impacts

A majority of consumers that either decreased or increased their curbside purchasing during the pandemic perceive themselves as returning to pre-pandemic purchasing patterns (i.e., in-store) once the pandemic ends (Figure 2). For instance, 53 percent of respondents that decreased their curbside purchasing during the pandemic indicated they would return to normal after the pandemic, as indicated by the southeast region “curbside decrease – similar to before” measurement. However, 47 percent indicated they planned to continue to purchase less from curbside options after the pandemic. For consumers that increased their purchasing at curbside during the pandemic, 59 percent indicated they would return to normal (i.e., in-store) after the pandemic. Twenty

percent indicated they wanted to continue purchasing curbside as they had during the pandemic, while the final 21 percent of consumers purchasing plants at curbside during the pandemic would revert to purchasing in-store.

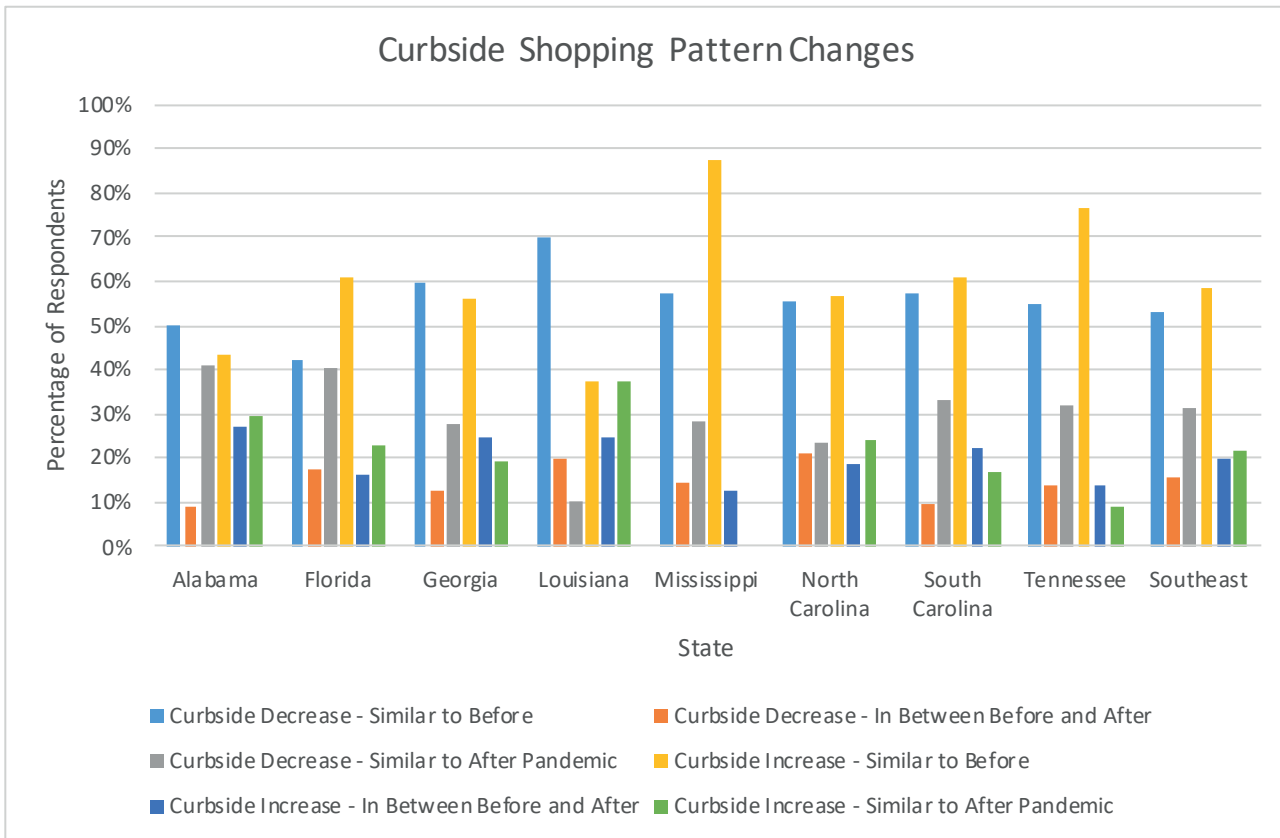


Figure 2. Changes in Curbside Purchasing Habits by How Purchasing Habits Changed During the Pandemic.

For online purchasing, a majority of consumers indicated they would return to their pre-pandemic purchasing patterns (Figure 3). Of the consumers that purchased more plants online during the pandemic, 56 percent indicated they would purchase less online once the pandemic ends. Twenty percent noted they planned on purchasing less online after the pandemic, with 24 percent planning to purchase online more than pre-pandemic but less than during the pandemic.

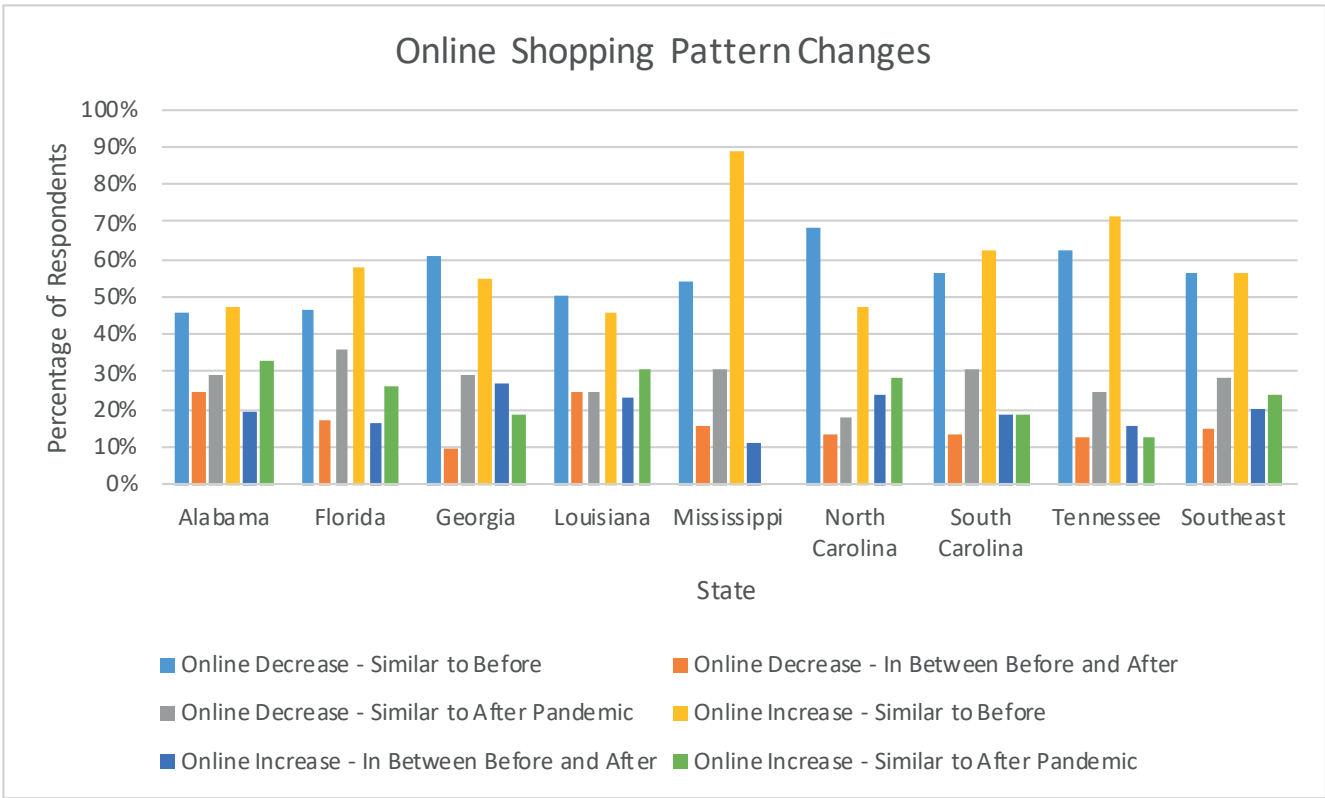


Figure 3. Changes in Online Purchasing Habits by How Purchasing Habits Changed During the Pandemic.

With respect to plant expenditures, 70 percent of consumers that purchased fewer plants during the pandemic plan on reverting to their pre-pandemic levels after the pandemic ends (Table 3). Eighteen percent planned on continuing to purchase fewer plants, with 13 percent undecided. For consumers that purchased more plants, 59 percent planned to purchase fewer plants after the pandemic, with 26 percent believing they would continue to purchase more plants.

Table 3. Changes in Plant Expenditures by How Purchasing Habits Changed During the Pandemic

Purchase Plants	# of Obs.	Expenditures After Pandemic					
		Plant Decreased			Plant Increased		
		Similar to Before Pandemic	Similar to During Pandemic	Do Not Know	Similar to Before Pandemic	Similar to During Pandemic	Do Not Know
Alabama	67	70%	17%	13%	47%	38%	16%
Florida	121	67%	23%	10%	61%	18%	20%
Georgia	168	76%	9%	15%	54%	28%	18%
Louisiana	37	71%	14%	14%	50%	42%	8%
Mississippi	25	14%	43%	43%	73%	7%	20%
North Carolina	63	80%	10%	10%	63%	25%	12%
South Carolina	120	75%	20%	5%	59%	25%	16%
Tennessee	69	67%	21%	13%	61%	30%	9%
Overall	670	70%	18%	13%	59%	26%	15%

Recommendations

For the majority of customers, the post-pandemic plant buying world will look very similar to the pre-pandemic plant buying world. Though the return to pre-pandemic levels may not be instant, a majority of consumers perceive their purchasing habits and plant expenditures to revert to pre-pandemic norms. Given these findings, producers and retailers should make sure they thoroughly analyze the market, especially their customer bases, in order to make informed decisions about how they change the way they do business.



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