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## **Preliminary Changes in Covid-19 Purchasing Habits of Southeastern U.S. Green Industry Consumers**

Ben Campbell, Associate Professor and Extension Economist  
Department of Agricultural and Applied Economics, University of Georgia

Alicia Rihn, Assistant Professor  
Department of Agricultural and Resource Economics, University of Tennessee

Julie Campbell, Assistant Research Scientist  
Department of Horticulture, University of Georgia

Historically, plant purchases frequently occur in physical retail centers (e.g. mass merchandisers, garden centers, etc.). The COVID-19 pandemic resulted in adoption of retail measures to reduce disease transition and spread, including stay-at-home/lock down orders, retail store closures, limited retail occupancy, and social distancing. Consequently, consumers ability to shop for products in-store were impacted and opened the opportunity to use non-traditional sales methods. This report provides a summary of consumers' perceived plant purchasing behavior in the Southeast U.S.

### **Changes in Shopping Patterns**

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

### **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 pre- or during 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 purchasing habits.

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

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% perceived their plant purchasing would change to during pandemic levels.

### **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% of respondents that decreased their curbside purchasing during the pandemic indicated they would return to normal after the pandemic. However, 47% 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% 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% of consumers purchasing curbside during the pandemic, would revert back to purchasing in-store.

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% indicated they would purchase less online once the pandemic ends. Twenty percent noted they planned on purchasing less online after the pandemic with 24% planning to purchase online more than pre-pandemic but less than during the pandemic.

With respect to plant expenditures, 70% of consumers that purchased less 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 less plants with 13% undecided. For consumers that purchased more plants, 59% planned to purchase less plants after the pandemic with 26% believing they would continue to purchase more plants.

### **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.

Table 1. Changes in shopping habits.

Location	Change in Plant Purchasing During the Pandemic Compared to Pre-Pandemic								
	Mean								
	Overall	Alabama	Florida	Georgia	Louisiana	Mississippi	North Carolina	South Carolina	Tennessee
In-Store - Curbside at Mass Merchandiser (e.g. Wal Mart, 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, Lowes)	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. Wal Mart, 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, Lowes)	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%

Table 2. Anticipated changes in purchasing of plants after the Coronavirus pandemic.

Purchase Plants	Purchasing Habits after Pandemic		
	Similar to Before Pandemic	Similar to During Pandemic	Combination Before/During Pandemic
Alabama	48%	20%	31%
Florida	53%	17%	30%
Georgia	58%	20%	22%
Louisiana	49%	22%	30%
Mississippi	67%	17%	17%
North Carolina	60%	17%	23%
South Carolina	58%	19%	23%
Tennessee	68%	14%	18%
Overall	57%	18%	25%

Table 3. Changes in Plant Expenditures by how Purchasing Habits Changed during the Pandemic.

Purchase Plants	<u>Expenditures after Pandemic</u>					
	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	70%	17%	13%	47%	38%	16%
Florida	67%	23%	10%	61%	18%	20%
Georgia	76%	9%	15%	54%	28%	18%
Louisiana	71%	14%	14%	50%	42%	8%
Mississippi	14%	43%	43%	73%	7%	20%
North Carolina	80%	10%	10%	63%	25%	12%
South Carolina	75%	20%	5%	59%	25%	16%
Tennessee	67%	21%	13%	61%	30%	9%
Overall	70%	18%	13%	59%	26%	15%

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

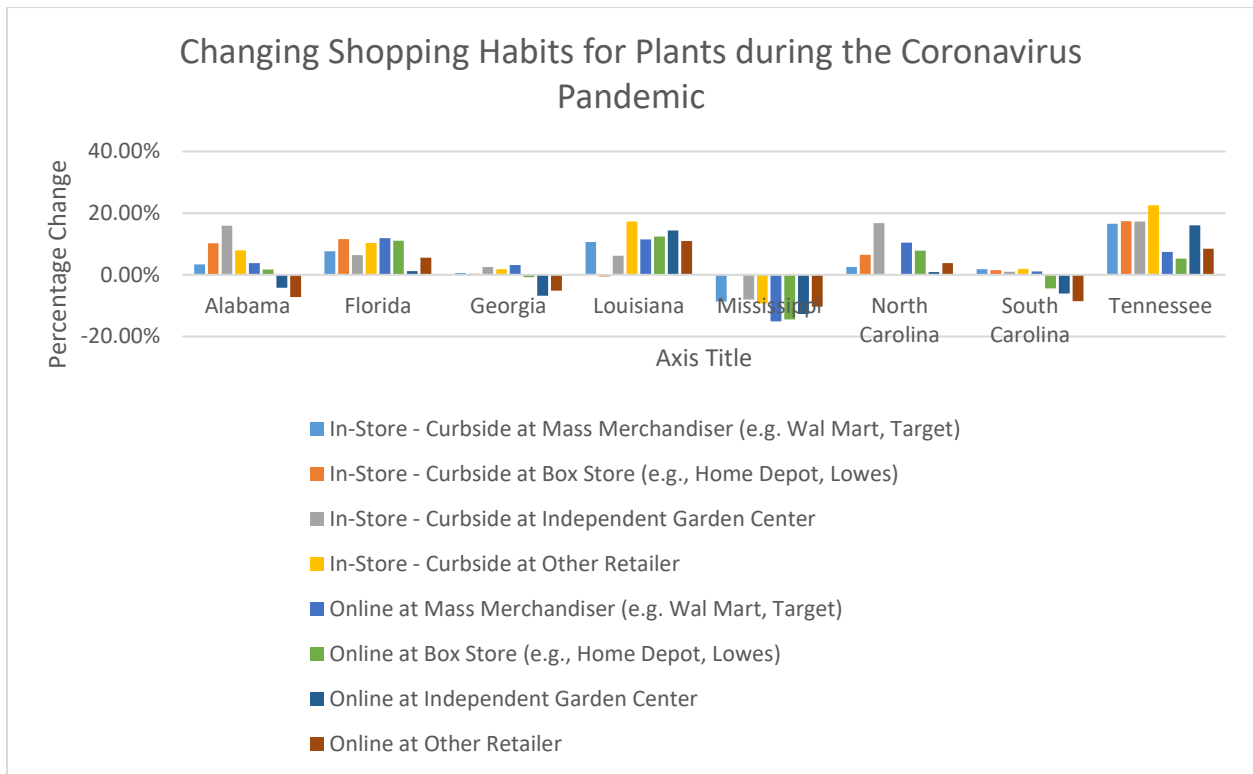


Figure 2. Changes in Curbside Purchasing Habits by how Purchasing Habits Changed during the Pandemic.

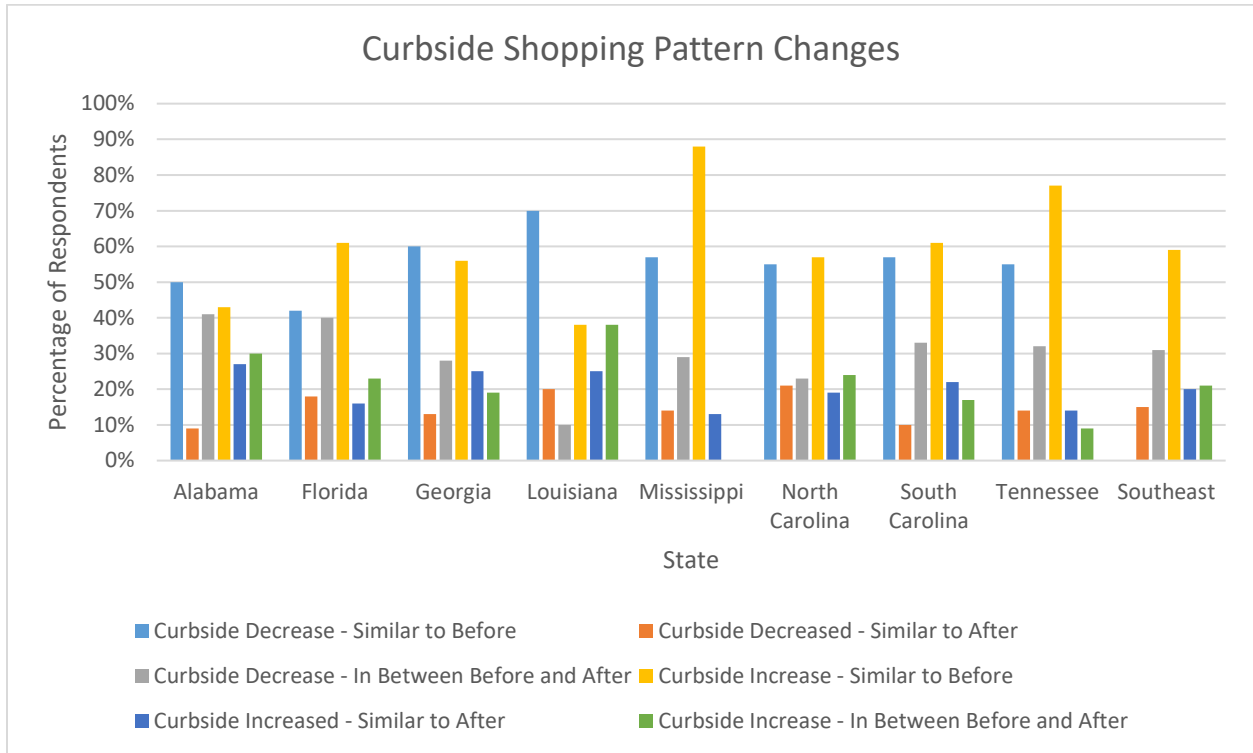


Figure 3. Changes in Online Purchasing Habits by how Purchasing Habits Changed during the Pandemic.

