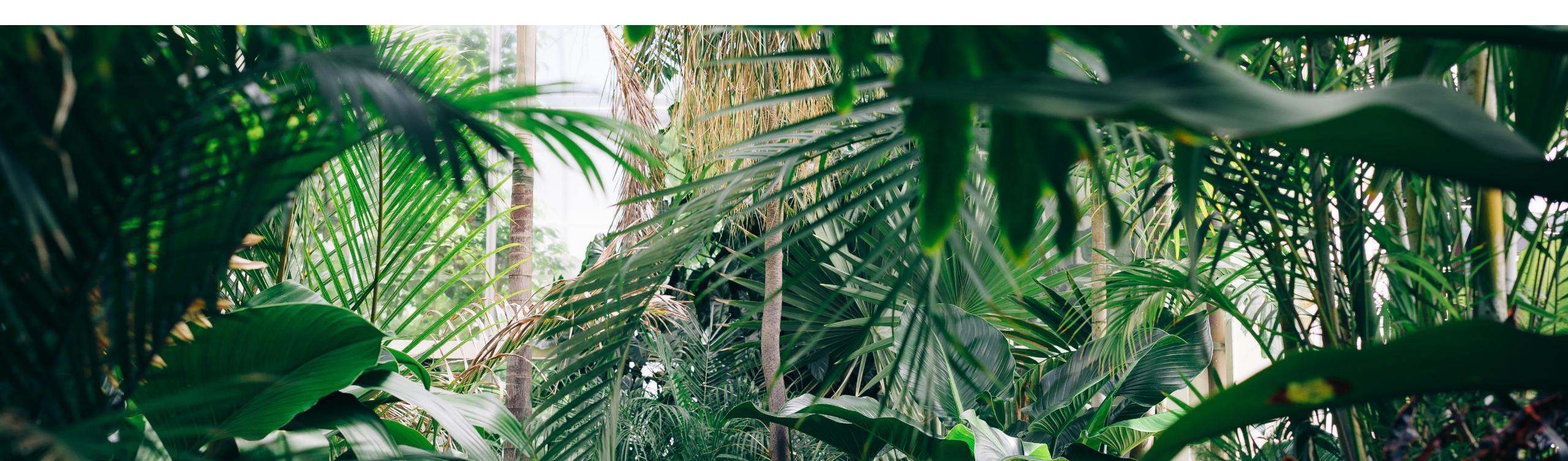




#### Project Demeter // August 2019



# Instagram-friendly and bursting with 'wellbeing benefits', pot plants are ripe to be repackaged

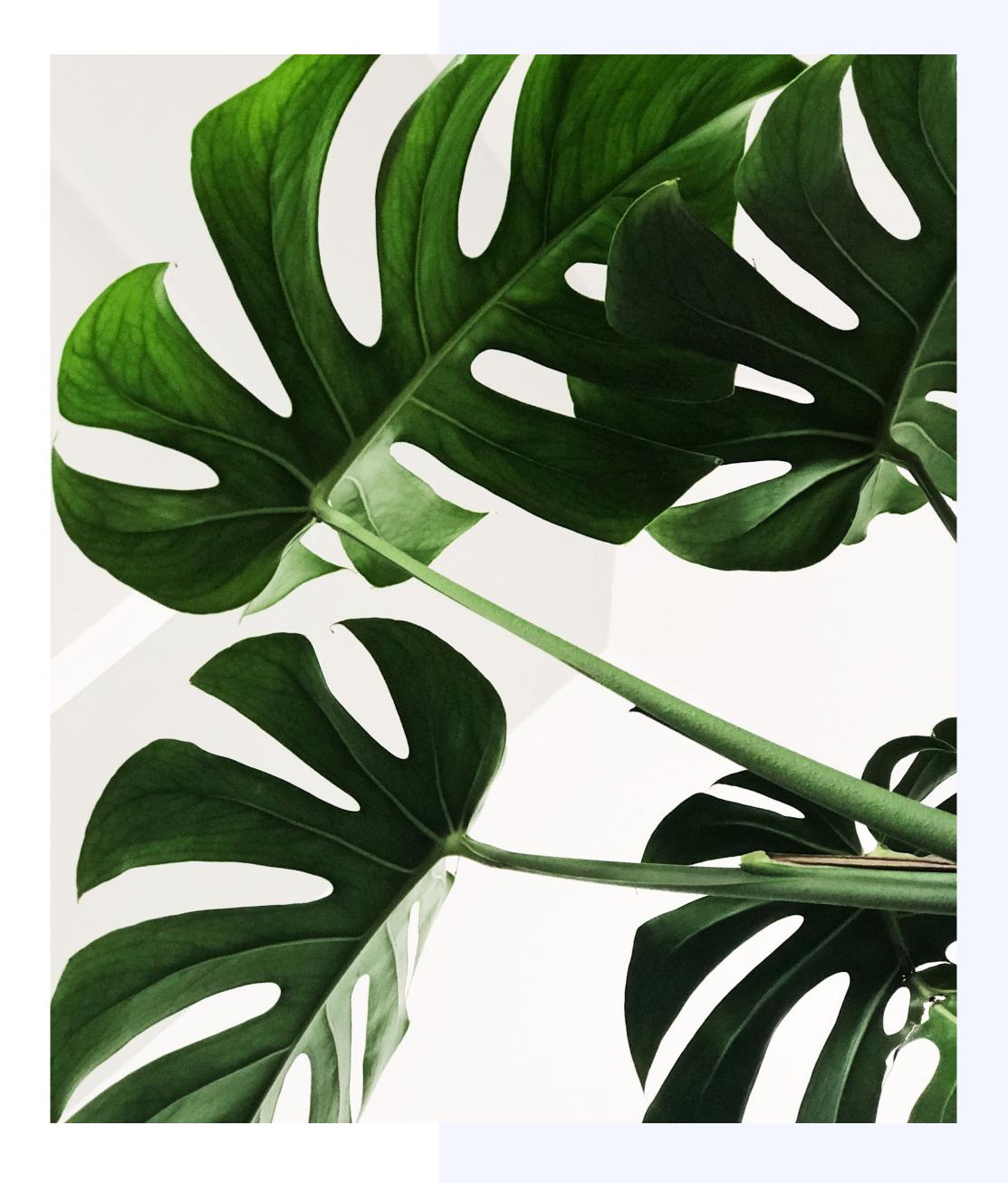


and reinvented.

The world is rapidly urbanising with significant changes in our living standards, lifestyles, social behaviour and health. The need for living spaces to provide an oasis of calm and purity for busy urban dwellers has never been greater.

# House plants: The new \$888 bloom economy.

Across Europe and the USA, consumers spend \$88 billion annually on plants and flowers for the home. But direct-to-consumer plant brands are few and far between. Traditional incumbents such as garden centres struggle to transform to the expectations of today's consumers.



## The rise of the millennial 'Plantfluencer'

### NEW YORKER THE LEAFY LOVE AFFAIR BETWEEN MILLENNIALS AND HOUSEPLANTS

### domino

"Plantfluencers"

### The New York Times

### Meet the Plantfluencers

In a world of climate change, creating a biome of one's own.

# Inside the Homes of Instagram's Top

# D2C brands are beginning to emerge, but there's room for more.

Most new D2C brands are limited to small geographies, presenting an obvious opportunity to enter new territories, however we can go beyond simply replicating...

Source: Venture Beat, Crunchbase



Patch is a direct to consumer plant delivery service in London. Last year solid 120,000 plants. Founded 2015. Raised £1m seed round.

# The Sill

The Sill is a direct to consumer plant delivery service in the US, founded in 2012. Raised \$5m Series A.

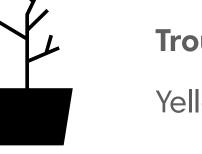
### Plant care presents a number of opportunities areas.

Whilst new entrants are focussing on delivery innovation, there still remains a number of other areas to create a more holistic approach to plant care.



Watering

Frequency, amount, holidays, etc





Soil swaps

Knowing correct product, etc

Accessories Smart pots, etc

Troubleshooting

Yellowing, shedding leaves, etc

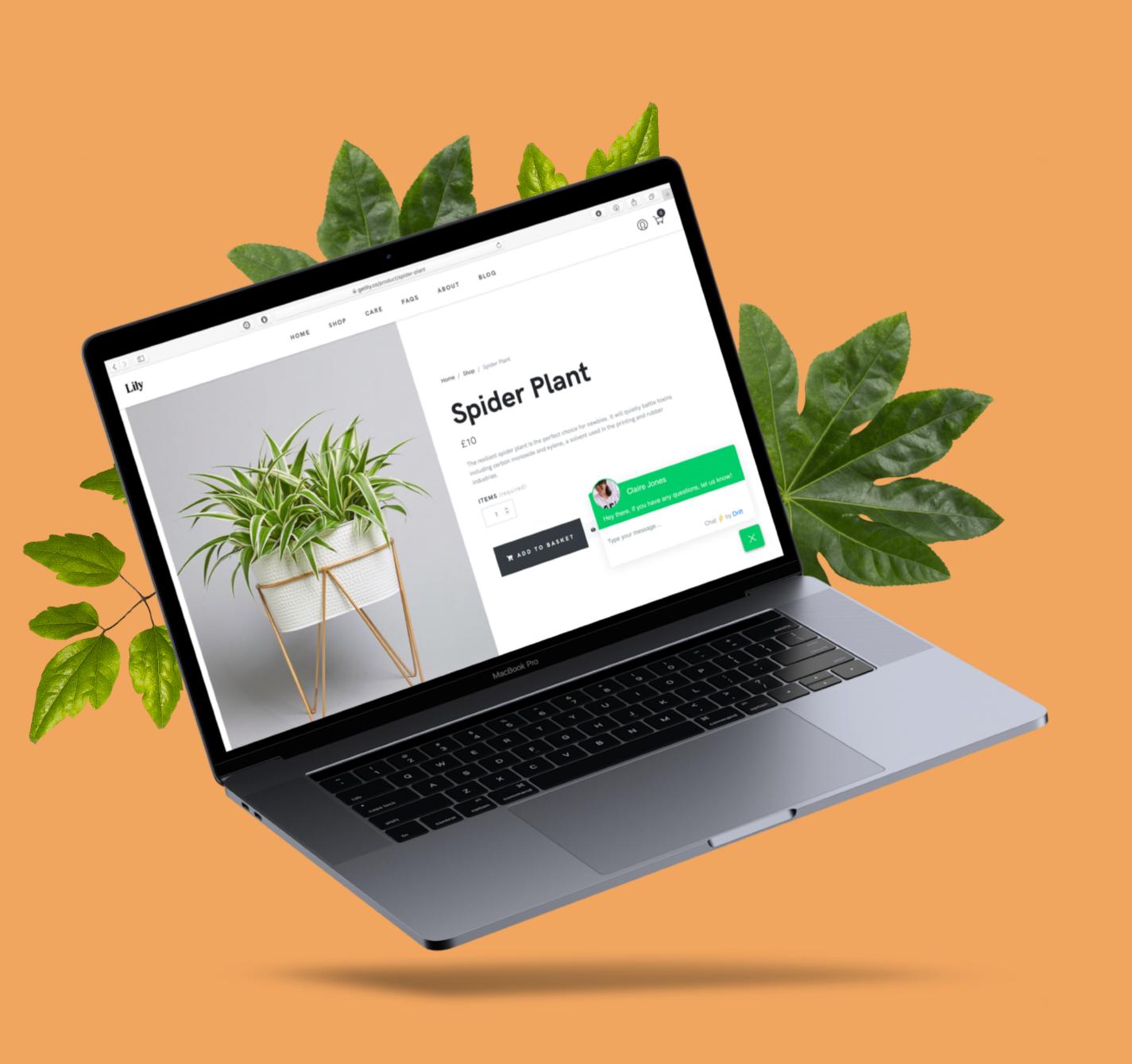


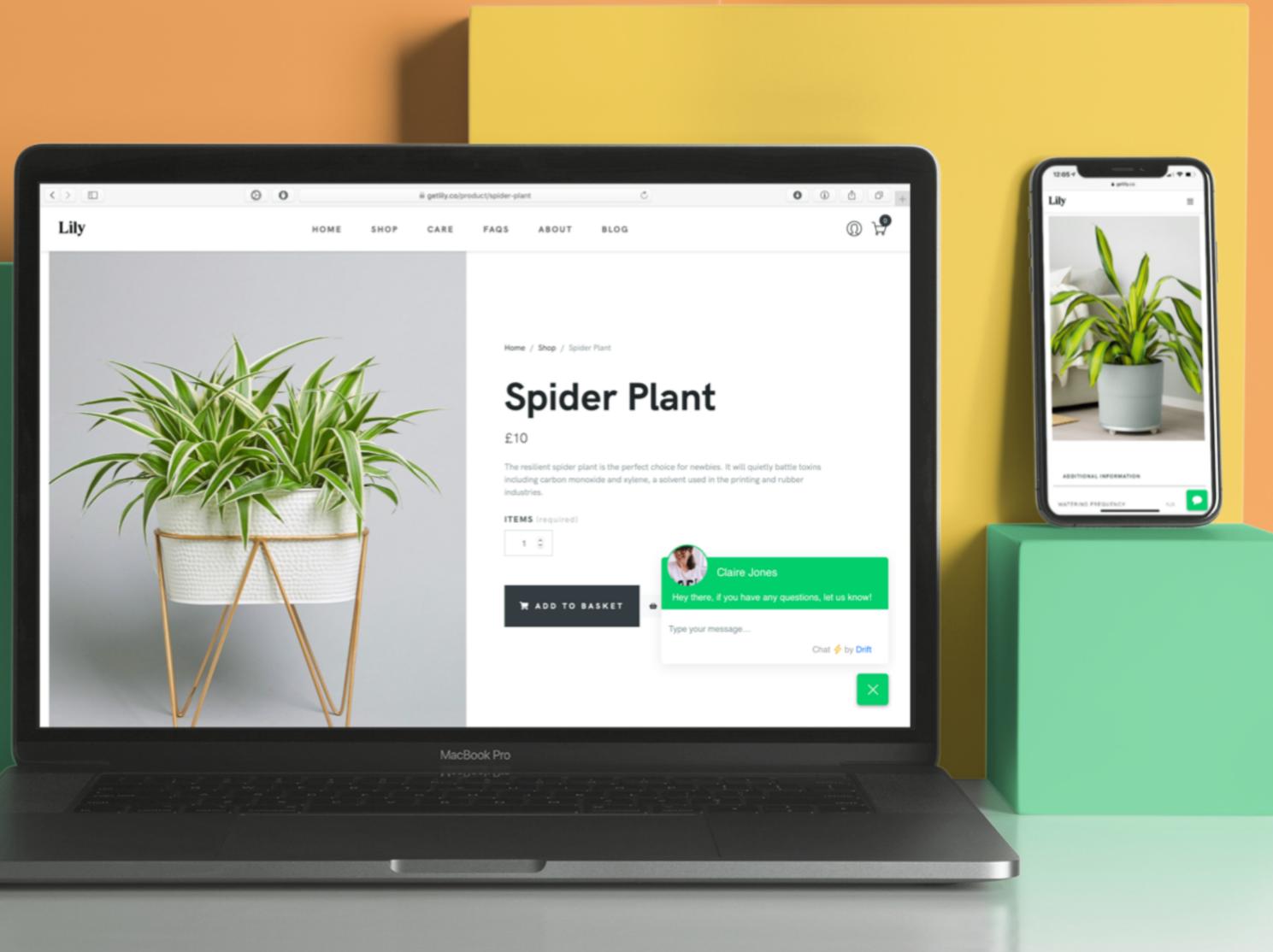
Repotting

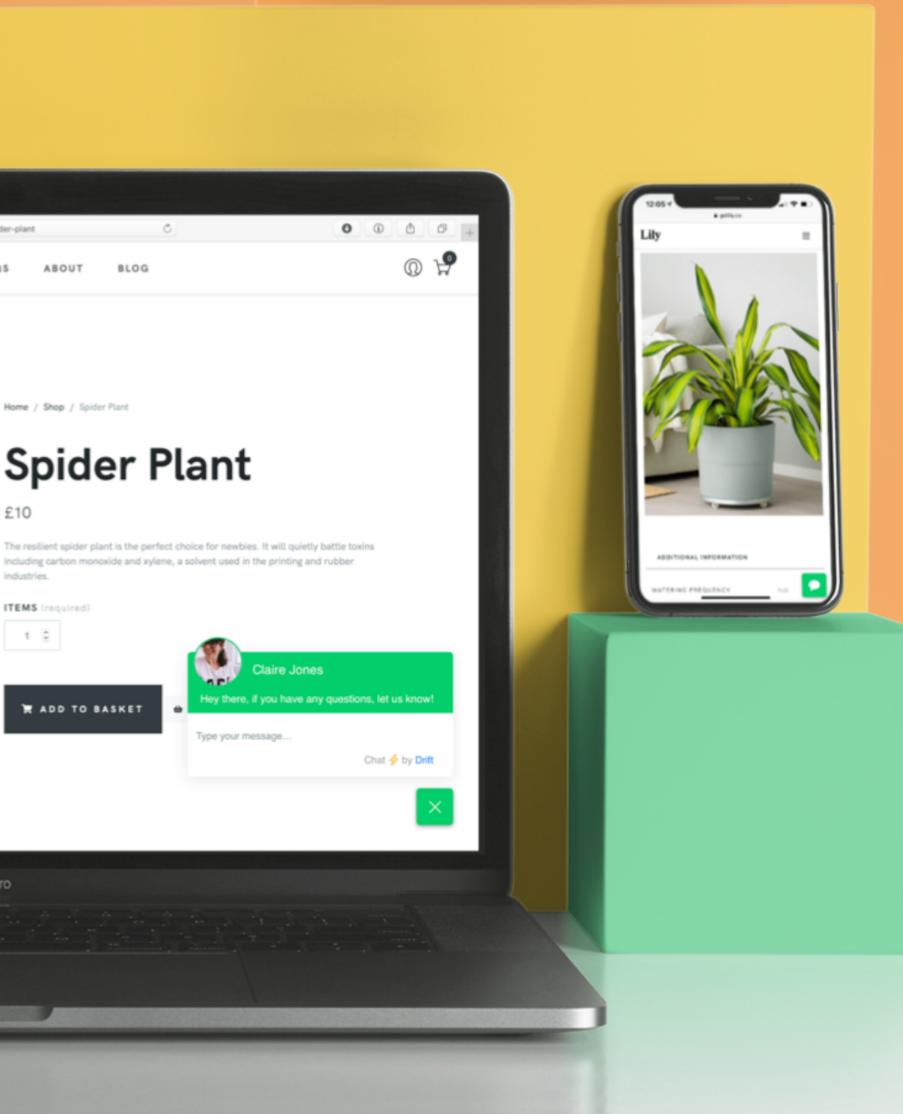
How to, new pots, sizing, etc

# Lily A breath of fresh air for your home.

We've taken the first digital and holistic approach to plants. From helping you to decide what's right, to delivery to aftercare, Lily helps you every single step of the way.







# You shop. We drop.

Browse our range of plants from the comfort of your home. When you're ready just tell us when and where to drop off your new green friends.



### Shedding leaves? There's an app for that.

Introducing BotanistTime: it's like FaceTime, except you talk with one of our botanists – that's a plant expert – so you can show them any issues you may be experiencing with your plants. If you don't feel like talking, you can just send them a picture – whatever suits you.





### Try before it dies: check your space.

Use the Lily app to see how our range of plants look in your own space, and check if the space your thinking of is suitable for your future plant.







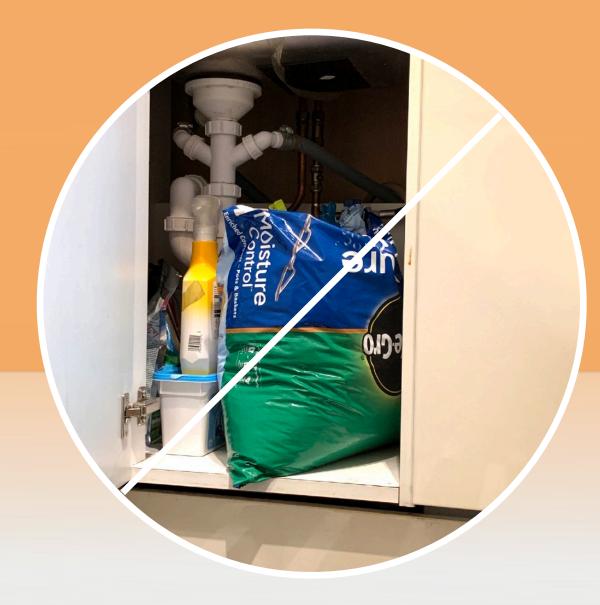
### Need a reminder? Leaf it to Lily.

As Lily knows all about the types of plants you have, the app can automatically remind you when they may need to be watered.



### Replenish Subscription. You're soiled for choice.

Get sent the right nutrients and soil for your plants when it's time to repot or replenish them. We'll even show you how do it. No more oversized bags of soil under the sink.





# Scope for much more...



### Plant-lapse Watch them grow.

Create a time-lapse of your plant in the Lily app to share with friends on social media. #watchthemgrow



Smart pot accessories. Don't leaf home without it.

Pots that keep watch of your plants health, and even keep them watered whilst you're away.



### Hydroponics. You grow it to yourself.

Growing fresh food at home could be a logical next category.





# Lily The first end-to-end approach to plants





Guidance

Curation

Fulfilment



Aftercare

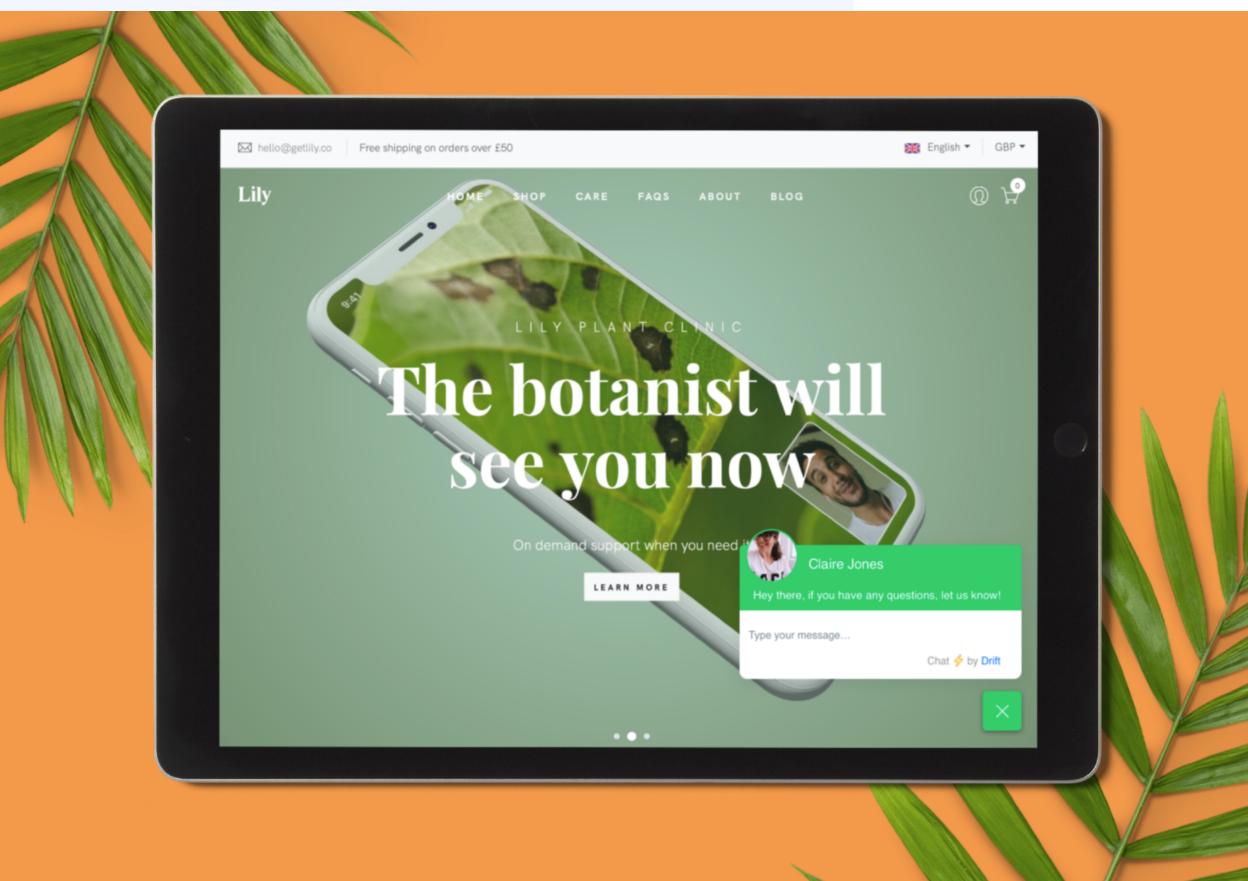


Replenishment

Engagement



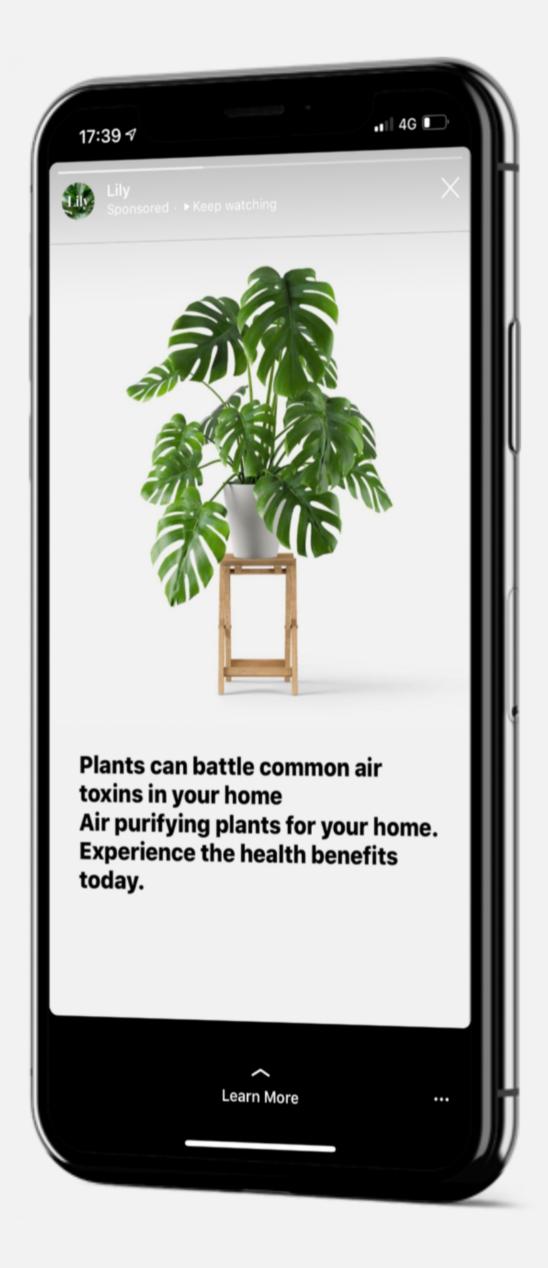


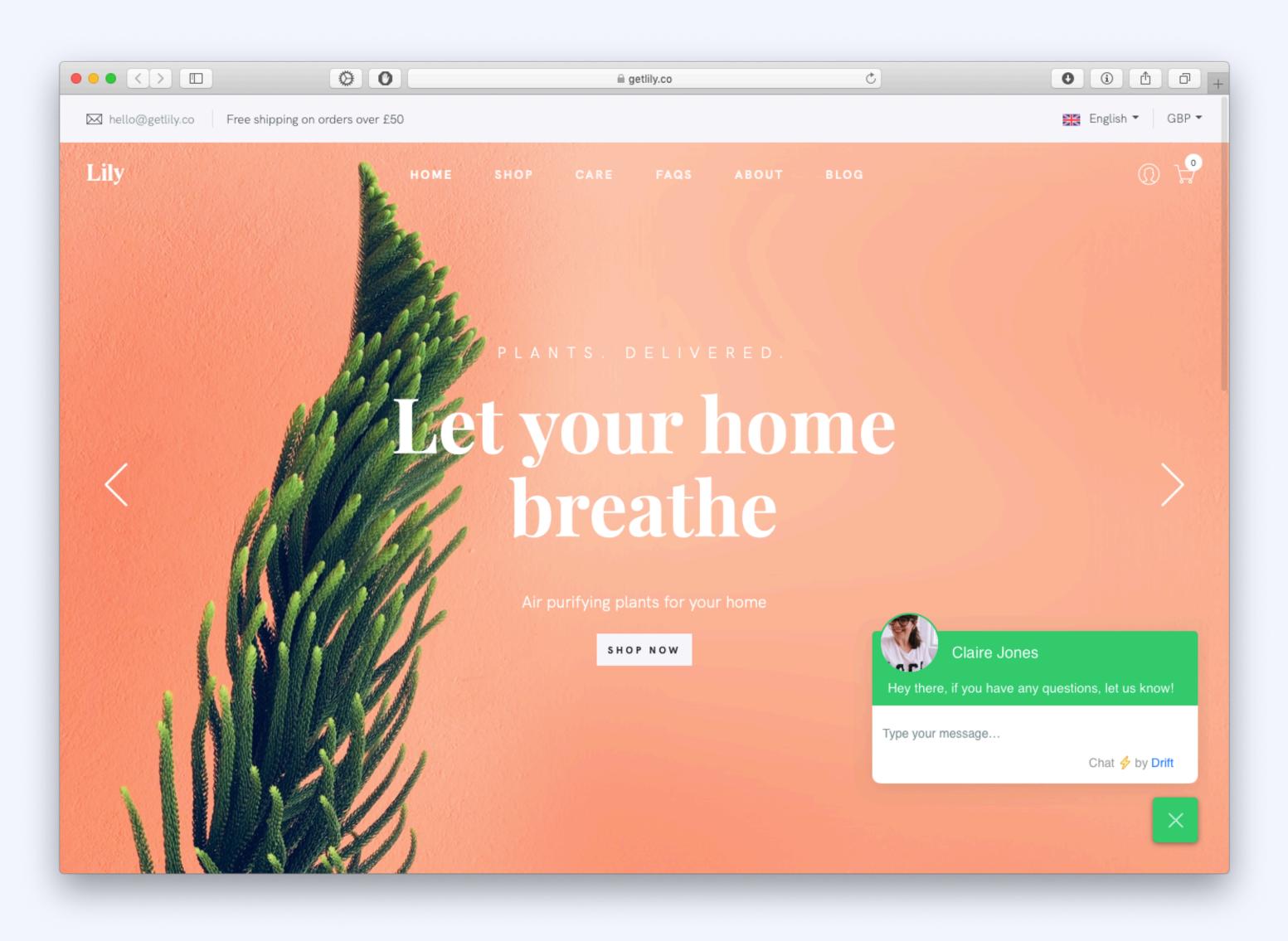


### SMOKE TEST.

# TEST OBJECTIVES.

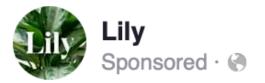
- Approximate cost of acquiring customer
- Understand customer motivations for purchase
- Categories of interest
- Products of interest
- Uncover questions potential customers may have about propositions



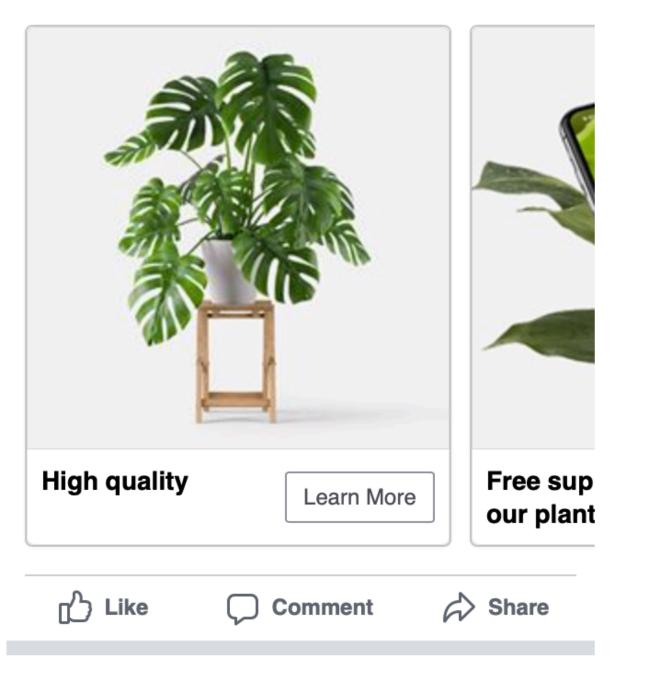


www.getlily.co

### **AD VARIANTS.**



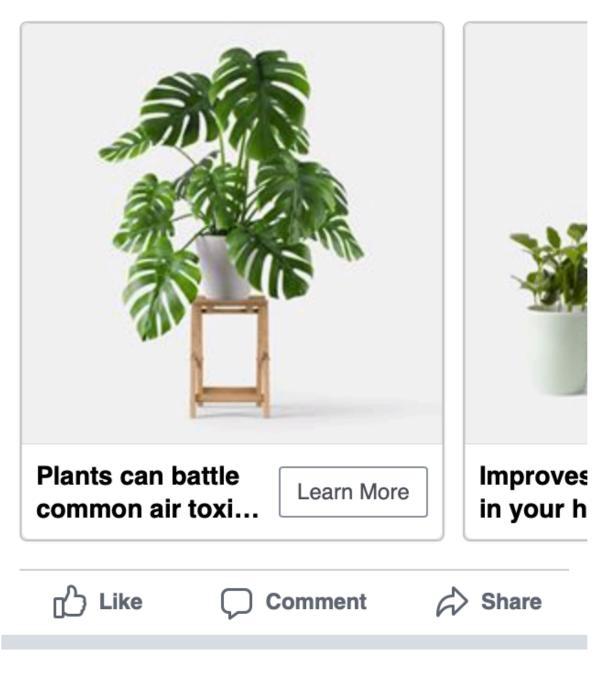
Shop indoor house plants.





•••

Air purifying plants for your home. Experience the health benefits today.



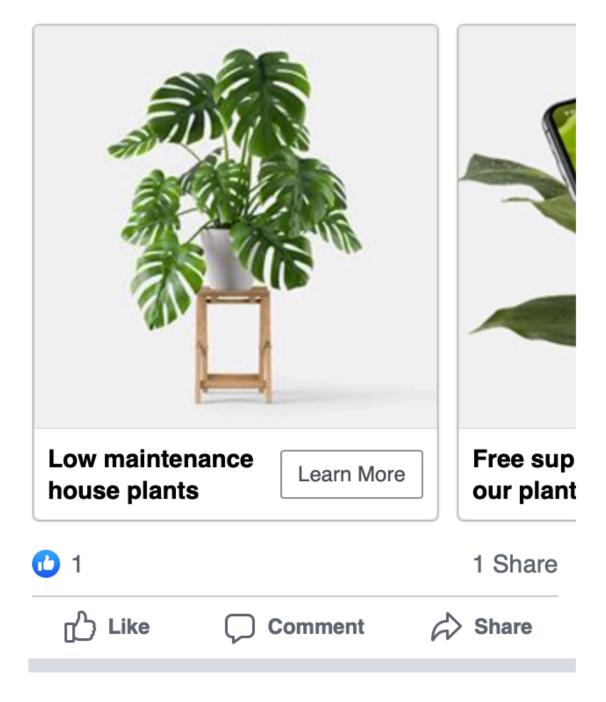
### Control

•••



Easy to maintain house plants, plus free one-toone help from our plant experts.

•••



Low maintenance

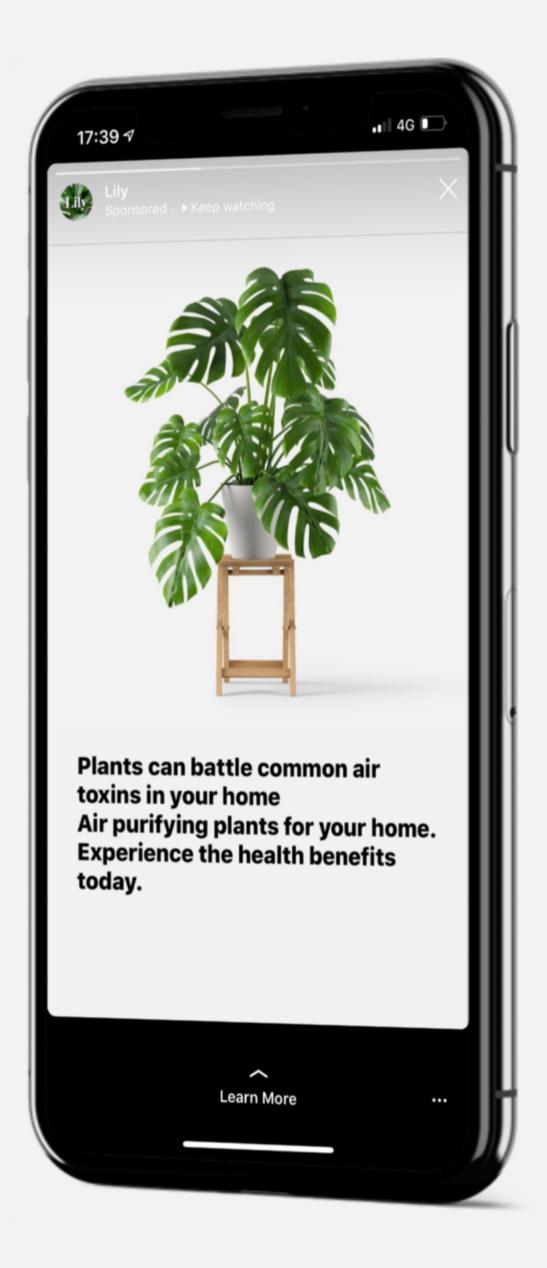
Health

### TEST OUTCOME.

### £100 ad spend over 24 hours

	Reach	Landings	Cost Per Landing
Control	4291	31	£0.39
Low maintenance	4315	62	£0.19
Health	4340	139	£0.11

### "Cost to checkout" £2.60



### **TOP PRODUCTS.**

• Spider plant • Low maintenance • Dragon tree • Air purifying • Areca Palm • Pots Golden Pothos • Window Sill Bonsai • Desk

Revenue	
£293	.00

Transactions 15

Avg. Order Value £19.53

### **TOP CATEGORIES.**

### FEEDBACK.

Sample of questions we received from <u>getlily.co</u>

What's your delivery time?

Hi. I was just looking at the spider plant. Does it come with all the parts in the picture or just the plant?

Does the dragon tree come with the pot as pictured? I couldn't find the same one on the website?

Does the succulent plant £10 one come with the pot as pictured please?

#### Are these plants real?

### **QUESTIONS FOR FOUNDING TEAM.**

- Fulfilment strategy
- Geography for launch

### **COMPETITOR: PATCH PLANTS.**

- Founded Dec 15
- Raised £1m seed (2017) + £2.5m A (2018)
- £5m revenue (2018) at 27% GM
- 25k deliveries to date in London
- Built own fulfilment after negative reviews with 3PL
- City by city strategy (London > Paris > etc)

$\star$ $\star$ $\star$ $\star$	15 Jun 2018	
Really poor service		Out of stock day of c
Really poor service. Order arrived incomplete, ohone number to contact the company and the via their website or by email. I am out of pocke had ner made the order.	Ordered a plant nearly tw between 9-11, received a 9.10am. Very bad cuator order. How could they no wwre measaging me upo	
		🖒 Useful 🛛 🗟 Share

### Poor Customer Service

 $\star$   $\star$   $\star$   $\star$   $\star$   $\checkmark$   $\checkmark$  Verified order

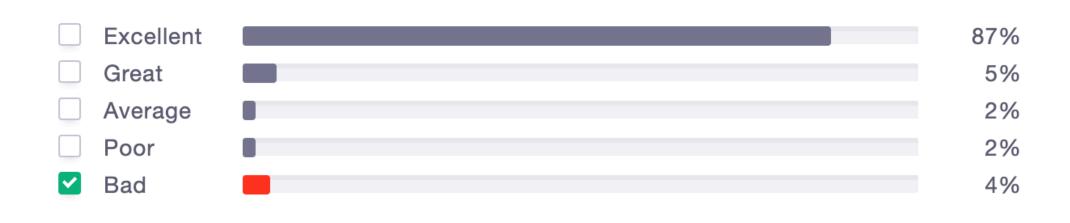
The tree itself was good quality. The delivery and Customer Service was appalling. No way to contact Patch other than email, which no one is looking at or responding to. Wouldnt risk it again next year. Disappointing experience all round.

### **Reviews 1,087**

#### Filter by: Ratin



English 🕥



10 Mar 2018

#### f delivery

y two weeks ago that was due to be delivered today ed a message from the driver saying it is out of stock at atomer service and will now be cancelling the whole y not know it was out of stock before today when they updates on delivery?

 $\Box$ 



1 review

Maria Rawlings

3 Dec 2018

#### Well first time ordering and so far not...

Well first time ordering and so far not impressed, ordered a 6-7ft tree and stand, the tree turned up is barely 6ft but no stand, tree is currently sitting in my porch and will probably die as it looks a bit ropey anyway, its meant to be non drop but there are needles everywhere and I haven't even unpacked it yet!! I have sent an email but they have not replied to my email yet and no customer service number to call, so i feel like I have been had quite honestly!!! £77 down the drain......

🖒 Useful 1 🛛 🗠 Share

