Know-how for Horticulture™

Nursery and garden industry consumer research

Mark Dignam
Mark Dignam and Associates

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Published and distributed by:
Horticultural Australia Ltd
Level 1
50 Carrington Street
Sydney NSW 2000
Telephone: (02) 8295 2300
Fax: (02) 8295 2399
E-Mail: horticulture@horticulture.com.au

Horticulture Australia

Mark Dignam and associates Pty Ltd
A.C.N. 070 160 440

46 Bay Street
Croydon
NSW 2132
Ph: (02) 9797 0277
Fax: (02) 9798 2770
Email: dignam@mt.net.au

Horticulture Australia Consumer Study for the Nursery and Garden Industry

A research report from the conduct of consumer research to assist the industry in segmenting, analysing and then marketing to gardeners in Australia.

Prepared for:

Horticulture Australia Ltd
Level 1, 50 Carrington Street
SYDNEY NSW 2000

And the

The Nursery & Garden Industry Australia

Client Contact:	**Ms Sarah Pennell** **Senior Marketing Manager**
MD & Associates Contact:	**Mark Dignam**

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1. Executive Summary

This report summarises the findings from qualitative and survey research with consumers throughout Australia, interviews with the gardening media, and a literature review of relevant topics. The research was undertaken to understand consumer motives for and barriers to gardening, influences upon gardening, and competition that gardening faces in terms of time and money.

The main findings from the research are summarised below, with the next section of the report detailing main conclusions and our recommendations for communications and marketing strategy.

A. The Gardening Market is Becoming More Segmented

A review of Bureau of Statistics data suggests that the Australian population is changing quickly, with a move toward more distinct segments, each with specific interests and needs:

- More single person households and more couples with no children
- Smaller blocks due to urban consolidation
- Increased disposable income for medium to higher income earners, thus the cost of gardening at least for some is likely to become less of an issue
- Less free time due to increasing female workforce participation, possibly leading to easier, quicker solutions, and possibly greater demand for contracting services in the garden.

The survey itself identified major attitudinal and behavioural variations across the "Show me the money" segments, as well as demographic groups, with interest in gardening in particular being an important variable.

Our main comment is that segmentation and positioning will continue to become more important, and that this segmentation of the market is likely to lead to the need for more service, more demand for contracting services and a need to make gardening quicker and easier.

B. Learning to Garden at a Young Age is Useful if it is Seen as Fun, Not a Chore

- The literature review identified numerous anecdotal reports that suggest that starting to garden at a young age is critical to longer term enjoyment of and participation in gardening

- This research suggested that the relationship is not simple, with the circumstances surrounding initial gardening experiences arising as important. Many saw early experiences as "chores" and bit not enjoy them, having no control over the activity
- Whilst 79% initially liked gardening, others developed an interest at a later age. Some developed an interest when they could personally plan the gardening, such as owning their own home
- Having a family that values and encourages gardening, having specific projects (e.g., growing vegetables, flowers) and having some control over the project appears to help initial interest. Gardening needs to be positioned as a fun learning experience, and actively encouraged at home and/or school.

C. Parents are the Main Source of Influence When Young, and The Media, Friends, Relatives and Nurseries Later in Life

- Both parents exert a strong influence on children in relation to their interest in gardening, and other relatives are influential to a lesser extent. Mothers were found to be becoming more important than fathers
- Schools and friends play little role as information sources
- Without parental supervision, many clearly learn by trial and error, and the errors can quickly put people off gardening. It would help if they learned to do it correctly at a young age
- Over time, the media was the main source of information, particularly TV, books and magazines. Friends, relatives, nurseries and the neighbourhood also provide information
- When asked what their main sources of inspiration are, the visual media was again the leading source, particularly television (37%) and magazines (26%)
- Nurseries (7%) and garden centres (2%) were only occasional sources of inspiration, less so than parks and gardens (15%) and neighbours (24%), which suggests an opportunity for the industry
- Whilst the media are clearly important, they sometimes make gardening look too easy to be true. However, we found little evidence that the media is a substitute for real gardening (like a "fix").

D. Only a Minority are Well Informed About Gardening

- Most regard themselves as being "quite" or "not very" knowledgeable about gardening, and only 9% said that they were "very" knowledgeable
- Interestingly, 43% rated themselves as being "very" interested in gardening, another 41% were "quite" interested

- The challenge appears to be in increasing knowledge, more so than interest, and this explains why learning is often by trial and error
- Keen gardeners typically regard themselves as being “outdoor” people, and were also sensory driven, responding to the colours, beauty and aromas of gardens.

E. Time Arose as a Greater Barrier than Cost, and Gardening Expenditure is Good Value for Money

- For most people, gardening needs to fit in with other time pressures. Only 8%, being the most keen and committed gardeners, treat it as a priority, though another one third regularly put time aside for it
- To the majority, gardening is fitted in around other activities, often being done in a reactive way, being to keep the garden under control
- Despite the above, time is less of a barrier than **interest**. If they had a free day, only a minority would spend it gardening. The central barrier is the priority they give it
- In terms of the cost of gardening, it arose as more labour than cost intensive, with major projects being the exception
- Lots of bargains can be found, and those on limited budgets thought that it limits some purchases, though they can economise, such as getting cuttings, buying at markets, etc. Gardening expenditure rarely seen as a trade-off with other purchases
- Gardening expenditure also rated highly in terms of value for money, 92% agreeing that it “definitely” or “probably” gives them value.

F. There and Several Motives for Gardening, Though More are Outcomes Based

- There are a number of motives for gardening, and numerous benefits were associated with it. It is both a positive experience as well as leading to a sense of reward or achievement when completed
- To those less interested in gardening, the motive is functional, being to keep it under control. However, even those not liking gardening do appreciate the end result, of having a nice garden
- Overall, the single main driver was the satisfaction, enjoyment or therapy they derive from gardening
- The main drivers are individually focused, not related to their family, the environment or wildlife. Some of these benefits are recognised, though are added benefits rather than real motivators

- Tangible benefits such as achieving a goal, beauty, colour, a useful, attractive outdoor area, growing vegetables or fruit, were all drivers to some
- Given a forced choice, more (50%) said that the main driver is the outcome, and only 6% said it is the process. The remainder rated both equally
- The benefits are physical, emotional, practical and aesthetic, though outcomes-based benefits had broader appeal across segments and demographics
- Also note that whilst concern was noted regarding the drought, only a small number had made long term adjustments to behaviour, such as putting in water tanks, or changing the plant mix in their garden. Note that the drought had reduced plant purchases to some extent.

G. *Industry Accreditation is Potentially Valuable in the Market, Yet is not Well Known*

- Whilst 14% in the survey said that they were aware of accreditation, nobody could specifically name either AGCAS or NIASA
- Despite the above, most thought that they could expect more from an accredited nursery or garden centre, such as better staff, service, plant health and quality
- Accreditation is unlikely to affect existing loyalties, though nearly half indicated that they would prefer an accredited nursery if they moved or need a new one
- However, the benefits are theoretic at this stage as there is little awareness and knowledge of accreditation. If real benefits are to arrive, accreditation needs to reach a critical mass, and it is a long way from that point.

H. *Gardeners See Price, Range, Advice, Plant Quality and Service as Keys to Success*

- Overall, gardeners have high expectations for nurseries and garden centres, and prefer them to be more than just retailers. However, the market still expects good value for money and some will window shop at top nurseries, and then buy elsewhere
- Whilst they want pragmatic benefits such as price, range, advice, good information, healthy plants, personal service and convenient location, the more interested gardeners also wanted to be inspired by their appearance, such as water features, theme displays, lots of colour, etc
- In terms of improvements wanted from nurseries, most comments related to service (advice, information, etc) and improved appearance

- It was also evident that the nursery and garden industry does not have a distinct, coherent image to gardeners, and whilst it is associated with some positive image dimensions, a more distinct image may be beneficial, including association with service and professionalism.

I. There is Limited Interest in Usage of Contractors, But Growth is Expected

- Around one third of the total had used some type of contracting services, though most were general maintenance task, rather than design work
- Numerous barriers arose to using designers and advisors. Whilst cost was an issue, some did not want others meddling in their garden, particularly the better informed and prouder gardeners
- The main drivers of usage of contractors were the desire to avoid the physical effort, limited time, and lack of skills or knowledge
- Given the social, demographic and economic changes in Australia, these factors suggest that demand should gradually increase
- There was a good fit between garden centres and advisory services, with 38% being “very” or “quite” interested in home visits. They did however expect a lot for no cost.

J. A Number of Positioning Routes Could be Useful for Communications

The most successful positioning routes for communication would be:

- The sense of achievement from gardening
- The sense of pride experienced by gardeners
- It is one of life’s simple pleasures
- You can create something of beauty.

The above include a few output based routes, as well as experiential.

Further, a sensory approach to communications would help, as well as the concept of escapism from normal life and its pressures. Whilst environmental benefits were recognised, the level is more at their personal or local environment, not the global environment.

Overall, gardening is about their emotions, their need for achievement, their own personal space and their creativity. However, the outcomes focus was strong, and arose as more important than the experience of gardening as a communication tool.

K. The Gardening Media Suggest a Closer Relationship

- For the most part, the views of the media were quite similar to those of consumers. They saw the media playing an important role in stimulating interest, promoting gardening and increasing demand for gardening products
- As was noted by consumers, they accepted that some unrealistic expectations are set by the media, notably "makeover" type TV
- The media suggested more communication and co-operation with the industry, including HAL and NGIA. This includes providing the media with information on industry events and changes
- The media often felt that the gardening and nursery industry is not well promoted, suggesting more advertising and promotions.

2. Conclusions and Recommendations

Overall, there are a number of positive messages arising from this research, with a few weaknesses also being identified. The market is becoming more demanding, and the structural changes in the population are driving changes in gardening behaviour and purchases.

Given the turbulence in the world at the time of writing, a window of opportunity exists for further promoting gardens and gardening, both as a pleasant and rewarding experience, and particularly as activity that gives a sense of real achievement.

The "do nothing" scenario will lead to the industry having less control over its own future as our society changes, particularly in a period of international uncertainty and potential upheaval.

We make the following suggestions for positioning, targeting and promotions:

A. A Distinct and Strong Image is Needed

The existing image of the industry (not gardening itself) is indistinct and positions it as a "cottage" industry. Whilst this has some positive connotations, the industry comes across as fragmented and disconnected. A more coherent and positive image would keep the industry more at the top of consumer's minds, and make it easier to relate to.

The above suggests a need for:

- Development of **national campaigns**, which rely on agreed positioning routes, though not necessarily specific executions. National **co-ordination** rather than control is recommended
- Stronger **linkages with the media**, including:
    - Regular briefings of all media regarding industry moves, campaigns, etc
    - Liaison about current trends, fashions and likely future fashions
    - Information on any new R&D initiatives (e.g., hybrids, new colours, etc)
    - Advice on plants to suit weather conditions (e.g., drought) and local or regional climate more generally
    - Feedback or advice on plant availability
    - Leveraging media by using their ideas in advertising and promotions, and providing them with ideas (this would necessitate closer relationships in the first instance).

B. Similarly, Develop an Image for Accreditation

Developing an image for accreditation will assist in leveraging its potential benefits. At present, it has no specific image at all. Not one person in either the survey or group could name either AGCAS or NIASA. Its benefits are potential, though real. Further, the accreditation scheme has the ability to improve the image of the industry as being more professional, with standards and systems that improve plant health and quality, service, advice and knowledge

C. Develop Promotions to Position Gardening as Fun, Easy and Rewarding

We found that at a young age, the main barrier to gardening was that it is seen as a chore, not fun. At all ages, gardening was often seen as labour intensive and difficult, with gardening sometimes being reactive (to keep the garden under control), not a proactive activity. The rewards were however commonly recognised.

We also found that the priority given to gardening was the single major barrier, not time or cost. Whilst it does need to fit in with other activities and their budget, the relative priority it is given is salient.

The main positioning routes we suggested in the previous section indicate that both the activity itself and the benefits (beauty, order, function, pride, etc) are recognised and can be promoted. In addition, emphasis on ease and fun is needed to increase its relative priority.

The "ease" component needs to include simple information on how to do it. Even older gardeners are often uncertain, and avoiding trial and error would help. Information could be created such as **"How to get it right the first time".**

D. Target Children and New Home Owners

The literature review as well as primary research demonstrated the value of targeting children. We suggest:

- Development of schools programs which are project and learning based
- Provision of specific information for children
- A website or link for schools, parents and children regarding gardening, such as getting started, special programs like growing vegetables and flowers, how to maintain plants, etc
- Free samples such as seeds and seedlings.

We also believe that a "how to" type website for other gardeners is also worthwhile, noting that few considered themselves to be well informed gardeners, and that many mistakes are made along the way.

In relation to new home owners, they present a real opportunity to stimulate gardening interest, both among experienced and inexperienced gardeners. We suggest:

- Free home visits on a selective basis for potential new customers (which can be leveraged via sales of plants and supplies)
- Gardening clubs specifically for new home owners
- Direct mail and local advertising.

In relation to home visits, the research suggested that the short term market is more related to general gardening maintenance, whilst design work is a relatively small market. As some barriers arose to design and other advice, it needs to be initially targeted at those starting with a new home or garden, which offers the best potential pay-off.

E. Leverage Value for Money, Not Price, and Seek to Inspire Customers

Consumers did arise as being demanding, and some will trade off alternative suppliers to save money. At the same time, gardening expenditure was typically seen as good value for money, and the costs associated with it were not a major barrier.

We see little point in the industry trying to compete with outdoor markets or cut price operators. However, there are many ways of adding value that were identified in the research, viz:

- Customer service
- Advice and information
- Pleasant, inspiring settings and displays
- Range
- Value-added features such as cafes and amenities.

To get around the issue of price, we suggest:

- Regular specials could be offered on various plants and supplies (and they can be supported by the manufacturers and suppliers if done on a group basis) supported by local advertising and promotions

- Develop loyalty schemes for customers. For example, discounts and/or award points that are redeemable or extra services like home visits or personal advice
- Provide guarantees or warranties (which are likely to need to be conditional).

In terms of **inspiration**, nurseries and garden centres were only occasionally seen as sources. A few ideas are:

- Closer relationships with the media to create some of the themes they show
- Provide more “natural” displays, which show off the plants in a more pleasant environment
- Specific themes or styles to be displayed (which need to vary over time and can leverage the media)
- Use water or other features to create a more pleasant feel
- Provide point of sale information and photos which suggest suitable plant combinations or applications
- Staff to ask customers about their needs, particularly projects, and ask if they need any ideas to help develop a theme or style.

3. Introduction and Background

Mark Dignam & Associates Pty Ltd was commissioned by Horticulture Australia in conjunction with the NGIA during December, 2002, to conduct consumer research to assist marketing and communications strategy.

This report summarises the findings from qualitative and survey research with consumers across Australia, including interviews with the gardening media.

This project was designed to complement existing intelligence on consumer attitudes and behaviour. The NGIA is building a database of consumer motives in relation to gardening and garden spending, including internal and external influences on consumer behaviour, and concomitantly, how to influence consumer behaviour through marketing activity.

At the time of writing, the market is estimated as being worth $5,027 million, of which $3,103 M is retail sales. The sector has also grown strongly in recent years, largely through the expansion of hardware chains. The **2001/2 Australian Garden Monitor** estimated growth of 10.6% (including GST), which was driven partly by the growth of the Hardware Chains and also by "makeover" type TV channels. Retail nurseries have lost greenlife market share, though increased sales in other areas.

The Monitor also found that:

- There has been an increase in the **hardware mix** of the total garden and landscape spend
- Demand has increased for **flowering plants** (e.g., potted colour) and low maintenance plants
- In **allied products**, profit margins have been squeezed by aggressive competition between the main chains, and inflation growth in greenlife has been minimal
- There is an **increasing gap** between the better performing and poorer performing nurseries, in an increasingly competitive market.

At the time of writing, the nursery and garden industry is composed of around **3,500 production nurseries and 2,500 garden centres**, of which most are relatively small businesses. Growers often consider themselves to be "farmers" rather than business operators, and lifestyle considerations have been a factor in entry into retailing.

Based on recent trends, it is apparent that sales are moving from the traditional nursery and garden centre operator to large, multi-department hardware and garden centres. This suggests a **long run shift in consumer behaviour.**

This project was designed to provide insight into consumer attitudes and behaviour, including drivers of and barriers to their behaviour. A literature review was conducted prior to commencing the formal research, which is summarised in section 4 of this report.

4. Project Objectives and Outcomes

The main outcomes required from the project were to identify:

- ***The drivers and barriers to increased garden spending by segment***
- ***Internal and external influences on consumer spending and the potential benefit from these factors***
- ***Who are the competitors in relation to gardening – both time and money.***

More specifically, objectives were as follows::

A. Value of gardening and consumer motives:

- Time competition and priority
- Perception of perceived benefits
- Spending priorities
- Barriers to gardening and time
- Identify overall consumer motives and behaviours associated with them

B. Identify positioning routes and specific messages:

- Determine motives (desired end states)
- Develop positioning routes (e.g., health, environmental benefits, well being, etc)
- Build specific messages that reinforce the routes

C. Image Campaign:

- Definition of the best or ideal overall image
- Specific image dimensions that
- Image dimensions preferred by segment
- Potential benefits of a national campaign

D. Learning Influences and Behaviour:

- How people learn about and gain interest in gardening
- Impact of parental influences
- Other sources of learning about gardening
- Long term effects of learning when young
- Impact of children on parents

E. Industry Accreditation Schemes:

- Value of accreditation – both qualitatively and in financial terms
- Expectations from it
- Its ideal attributes – what the public hope it will deliver
- Existing positioning and knowledge of accreditation

F. Water Shortages and Impact:

- Extent of concern about it
- Impact on behaviour
- Threats for the industry
- Opportunities
- Likelihood it will remain an issue (short vs. long term issue)

G. Gardening Media and Sources of influence:

- Who consumers rely on for information, ideas and inspiration
- What sources are trusted
- How they access information
- Usage and attitudes of media
- Impact on gardening spending and behaviour
- Extent to which it is entertainment vs. impact on behaviour
- Ideas and information taken out

H. Positioning of Independent Retailers and Mass Marketers:

- Relative positioning
- Strengths and weaknesses
- Purchasing behaviour related to both

I. Do it Yourself and Usage of Contractors and Designers:

- Incidence of each
- Perceived reasons for usage of others
- Barriers to their usage
- How it affects their experience in the garden
- Preparedness to pay
- Future usage and benefits wanted

J. Strategic Partnerships:

- Types of organisations that the industry could or should be aligned with
- Perceived value of partnerships

5. Project Methodology and Implementation

The project was designed to build on past information including an existing segmentation model used by Horticulture Australia Ltd for consumers.

5.1 Segmentation Model

HAL's existing *"Show me the money"* segmentation model was used for this project, which is as follows:

Cluster Description	*Size (%)*	*Greenlife spend (%)*	*Non-greenlife spend (%)*
Cut flower	12	9	11
Bargain hunters	14	9	8
Non-confident loyalists	15	13	13
Self-expressionists	15	21	27
Green thumbs	15	19	16
Time poor	14	5	5
New seekers	15	25	19

The above segments are regularly tracked by HAL, and mesh together information on promotional influences.

5.2 Literature Review

A broad based search of literature on lifestyles and changing consumer needs, attitudes and perceptions was conducted in order to identify other factors that impact on this study.

Sources were local and overseas data bases, industry associations, lifestyle media and statistical sources.

The findings from the literature review are summarised in the next section, listed by topic. The topics reflect the initial brief.

Note that a lot of information, particularly from overseas sources, is rather anecdotal. Whilst it is of use, care should be taken that individual opinions are not seen as objective research.

Overall, local information was more useful on most topics, with research from the USA also being useful in many cases.

5.3 Media Interviews

Interviews were conducted with a sample of gardening and nursery media, covering all media types.

A sample was provided by HAL for this purpose, and the more specialised and more widely distributed publications, programs and broadcasts.

These interviews covered the same objectives, particularly their views of consumer behaviour, drivers and motives, barriers, future needs, industry image, etc.

Section 7 of the report summarises the media interviews.

5.4 Qualitative Research – Group Discussions

Qualitative research was used to explore consumer motives, values, attitudes, expectations and behaviour.

In terms of the structure of the groups, the segmentation model described above was used, with questions being included in the screening questionnaire for group recruitment.

A total of five groups were covered, with the "Time Poor" segment not being covered, and "Cut flower" and "Bargain hunters" being combined.

Group Plan

No.	***Segment***	***Gender & Age***	***Socio-economics***	***Location***
1	*Cut flower and bargain hunters*	*Females – Aged 20 to 35, single or young families*	*Lower to average incomes. Both blue and lower white collar. Up to $50K household income*	*Brisbane*
2	*Non-confident loyalists*	*Up to 35, males, couples or single*	*White collar. Average incomes*	*Brisbane*
3	*Self-expressionists*	*45-60, females, middle and later families*	*White and upper blue collar – not retired.*	*Canberra*
4	*Green thumbs*	*55 and over – males*	*White collar – semi retired or retired*	*Sydney*
5	*New seekers*	*Females, 30 to 45, younger families*	*Mix of white and blue. Average incomes*	*Sydney*

In all cases, group members had to:

- **Have a garden**, at least being a pot garden
- Be the **main or equal gardener** in the household
- Be primarily or equally responsible for **purchase decisions** in relation to the garden.

In terms of the **conduct of the groups**, organisation and conduct was as follows:

- Group discussions included 7-9 persons and were recruited by a professional recruiter (Taylor Research Services)
- A semi-structured group discussion guide would be used, giving them plenty of scope to raise issues. Each guide would be written to meet the objectives and outputs discussed
- With the exception of the Canberra group, all were held in professional venues and would be audio and video taped. The Canberra group was staged in a local motel board room
- The groups lasted 2 to 2 ½ hours
- Numerous self-completion exercises were used as well as discussion within the groups. The findings from these exercises are included in the qualitative report
- Respondents will be given a cash gratuity to attend.

5.5 Survey Phase

A national sample was randomly selected from white pages telephone directories, and included:

- All capitals including the ACT and Tasmania
- Other major conurbations such as Newcastle/ Hunter, Illawarra, Sunshine and Gold Coast, Geelong, Wagga Wagga, Townsville, Cairns, Launceston, Albury-Wodonga, Toowoomba, Ballarat, etc

Rural and remote areas were excluded.

Interviews were conducted by telephone from a central phone booth in Sydney. A pilot study was conducted in both a capital and one country area prior to commencement.

The sample plan is outlined overleaf.

Survey Sample Plan

State/region	*Sample size (N)*	*Sample proportion (P)*
Sydney	70	.14
Other NSW	30	.06
ACT	30	.06
Melbourne	70	.14
Other Victoria	30	.06
Brisbane	50	.10
Other QLD	30	.06
Adelaide	40	.08
Other SA	20	.04
Perth	40	.08
Other WA	20	.04
Hobart	30	.06
Other Tasmania	20	.04
Northern Territory	20	.04
Total	**500**	**1.00**

The random (sampling) error based on this sample size is a maximum of 4.4%. The sample was **post-stratified by weighting** to ensure that the total result is fully representative of the universe.

A multiple callback design was used to ensure that non-response error was minimised. The interview length was (x) minutes, with the interviewing being undertaken on weekends and weekday evenings. The interviewing was conducted during February, 2003.

5.6 Sample Selection and Descriptive Statistics

To qualify for interview, respondents had to at least:

- Have a garden (including a patio garden) that they tend themselves
- Have such a garden though do not do the gardening personally, yet see themselves as the person most responsible for it.

Consistent with past research, more were female (69%) compared to males (31%). Note that only one person per dwelling was interviewed, and an extensive call-back process was applied to reduce non-response error.

The demographic data from the survey sample is as follows:

Sample Group	*Number N)*	*Total %*
Gender Males	157	31
Females	343	69
Age Group Under 20 years	4	1
20 to 24 years	22	4
25 to 29 years	37	7
30 to 34 years	49	10
35 to 39 years	67	13
40 to 49 years	97	19
50 to 59 years	100	20
60 to 69 years	68	14
70 years and over	56	11
Occupation Managerial	30	6
Professional	91	18
Technical/para-professional	35	7
Other white collar	55	11
Skilled trades and crafts	36	7
Service worker	25	5
Other blue collar	8	2
Full time home duties	59	12
Student	10	2
Retired/pensioner	120	24
Looking for work	10	2
Other	21	4
Work status Full time	179	59
Part time	122	41
Household structure Younger singles	23	5
Couple/ no children	48	10
Family/ pre-school children	58	12
Family/ school age children	108	22
Mature family – older children	68	14
Older couple or singles	160	32
Cluster group Self-expressionists	100	20
Green thumbs	60	12
New seekers	83	17
Time poor	61	12
Non confident Loyalists	67	13
Bargain Hunters	66	13
Cut flowers	58	12

The demography of the sample was weighted in favour of older persons, females, and older couples and singles compared to the normal population. It represents the universe of persons who are interested in gardening. Note that we targeted the person who is most responsible for the garden, and in a few cases, that person would have done little or no gardening.

In terms of **dwelling types**, most (89%) were free-standing houses, with:

- 6% being semi-detached including villa, with a garden
- The remainder were flat and units, the occupants having patio or pot gardens. To qualify for interview, they needed to have at least a pot garden.

In terms of **ownership** of the dwelling, we found that:

- 45% were owned outright
- 38% were being paid off
- 12% were rented or leased, including a handful of housing commission dwellings
- A few others were owned by someone else, being minded, etc, and the remainder refused to answer.

In terms of their **present dwelling** 41% had no garden at all when they moved in (noting that some were units and town houses) with another 18% having only a partial or incomplete garden. Clearly, there was plenty of scope for creating a garden.

The **number of years** they had lived in their existing dwelling was as follows:

- The median number was 11.5 years, and was slightly longer in cities (12.3 years) compared to towns (10.1 years)
- It varied considerably across the states, being highest in other SA (15.5 years), and Sydney (14 years), Melbourne (12.6 years) and Brisbane (12.4 years) compared to Perth (7.7 years) and other WA (7.1 years) and other Tasmania (7.6 years)
- Average time varied by dwelling type, being longer for free standing houses (11.6 years) compared to all other types combined (7.2 years)
- Females (12.3 years) averaged longer in the dwelling than did males (9.8 years

- Those most interested in gardening had occupied their existing dwelling longer on average than others (12.5 years vs. 10.7 years).

5.7 Data Processing and Analysis

Outputs from the data analysis were:

- **Cross-tabulated results** including statistical **significance testing**
- The **segmentation model** used in the BMTM study was replicated and the segment clusters were cross-tabulated with the results from this survey.

The data outputs were presented to HAL under separate cover.

In terms of **error margins**, with a sample size of 500, the maximum error margin (standard error of the proportion) is 4.4%. The error is greater when disaggregated data is analysed. For example, with a sample size of 100, the error is nearly 10%.

We have replicated the "Show me the money" segmentation model, and the report outlines significant variations between them when appropriate. We have also included a section in the report which summarises the characteristics of each segment.

6. Literature Review and Historical Synopsis

A literature review of local and overseas research and data bases was conducted, to fit the topics that were investigated in this project, particularly **influences on gardening behaviour**.

A. Population Demographics, Housing and Households

The total Australian population was, at end June 2001, 19.4 million. Of that population, 14.4 million were in the capital cities, including Canberra, which is by world standards an unusual concentration in cities. Specific issues are as follows:

- Of the total population, 2.4 million (12.4%) are aged **65 and over**, with that proportion having increased from 9.6% over the last twenty years
- The percentage **born in Australia** vs. born overseas has remained quite stable, being 23.6% in 2000
- **Deaths** in Australia outnumber "natural" increase, implying that migration is entirely driving population growth
- **Median age** was 35.4 years in 2001, and we note that it is likely to increase to around 41 years in the next twenty years
- Average full time adult **weekly earnings** in Australia (August 2002) were $919 per week, which grew 5.3% over the last year
- **Disposable income** (based on ABS definitions) has increased 50% over the last decade, which is around 20% more than the CPI. As such, real disposable income has increased by just over 20% during that period
- Despite the above, one third were classified as being in some form of income distress
- The divide between top and bottom quartiles has also remained equivalent over the last decade (which is arguably contrary to popular opinion)
- Present **unemployment** is 6.1%, which has fallen 0.8% over the last year
- Out of 7.4 million households, 24.6% (one quarter) contain only **one person**, and this has steadily increased over the years
- Only 2.16 million households (29%) have children under 15 years. The **"nuclear family"** is really a minority at present. Also note that 3% of all dwellings were sole parent families
- In 57% of families with school age children, **both parents work** in paid employment, and 7.5% had neither parent in paid employment. Thus the traditional **nuclear family** (one working parent) is a minority – only 35%

- **Births** in Australia have slowly declined over the last decade – live births were just under 250,000 in 2000
- **Childlessness** in women as at 2000 was 25%. That is, one quarter of those not yet passed child bearing age will remain childless
- Of all persons aged 15 and above, 47% now have post-secondary **qualifications**, and 17% have a degree or higher degree – almost twice the figure ten years ago
- 9,755,000 people were in the labour force in 2001, the participation rate remaining steady at 63.7% over the last year
- **Average hours** worked based on full time workers was 40.7 hours. It is however not true that average hours worked has increased steadily. It has been steady over the last ten years
- **Part time work** has increased, up from 21.8 to 26.7% of the total workforce
- In terms of **health**, indicators are generally positive, with increasing life expectancy, less deaths by trauma (e.g., accidents), less cancer and heart disease, lower rates of smoking and drinking, and marginally improving dietary indicators.

Implications for the Nursery Industry:

Overall, the population is becoming **more fragmented and thus segmented**. This suggests a greater focus on **individual consumer segments** rather than mass marketing, and on **retailer differentiation** to meet their specific needs.

The move toward:

- More single person dwellings
- More people not having children at all
- Urban consolidation – denser population in cities and more high and medium density housing with little or no gardens
- Smaller building blocks (e.g., 450 sq metres vs. the conventional 700 or more)
- Increased disposable income (at least for some)

Also suggests that the singles and couples market and the market for smaller gardens are going to be **important segments in their own right.**

This segment may be appropriate for advisory services, and quick solutions.

B. A Lack of Time, Less People and Home and Competing Interests

While the issue of a lack of time is a potential barrier, the ABS data does not suggest that people are working more hours. However, it is apparent that the change is more related to the incidence of **working per se**.

The ABS data on leisure time does indicate less time spent on leisure in 1997. However, the average is made up of varying segments, and much of the change is explained by one or two segments.

Also note that we found in 1997 that the average number of hours spent on gardening was 6.6 per week, being:

- 10 hours per week among the older group (60 and over)
- Lowest at 5 hours per week among those aged 30-39.

The fact that nuclear families are a minority of households also implies that time spent looking after children is typical. Households with only one person (25%) were almost as common as two parent families with school age children.

The issue of **competition for time and money** was addressed in our 1997 report ((The Environment and the Consumer) found that:

- The issue was that of **priority** given to gardening. For most, it had to fit in with other activities and demands
- Competition for both time and resources was evident
- Despite that, many simply buy whatever they think is needed, rather than trading off other purchases
- Gardening purchases were **rarely budgeted**, other than major items or projects
- For the most part, gardening activity was not seen as a major cost
- The central issue was their **interest in gardening**, and this set the basis for the priority given to it, both in cost and particularly time.

The time poor gardener is just one segment, and past research has suggested that being "time poor" is a relative issue. That is, people **make time for issues that are a priority**. The main issue here is to **identify what makes gardening a priority**; what messages and themes drive motivation to garden.

The above issue also implies the need to focus on **solutions for the time poor**, which could in fact involve more expenditure on low-maintenance products and plants, advice, external gardening, etc.

Secondly, the above should lead to growth in **contracting services** (from ideas, to design, to maintenance).

Past research by MD&A and others has found that some are happy to spend money on gardening, though do not want to do the work themselves. Thus there is a difference between:

- The **experience of gardening** (health, pride, back to nature, well-being, enjoyment, family activity, environmental interest, etc)
- The **outcome**, being a garden that is attractive, useful, has lots of birdlife, etc.

The time poor would appear to be more **outcomes based**, for other groups, it is likely to be more **experiential,** though with a myriad **of perceived benefits.**

Our 1996 project for the (then) AHC indicated that gardening was often **experiential** though it moves through a continuum:

- At one extreme, are those with a **functional view of the garden** – they want to use it rather than work in it, and are potential candidates for commercial gardening and advisory services. This group was found to be younger on average though it did cover a range of ages
- In the middle is a large group that see gardening as an interest, particularly when **pet projects** are involved, though still recognise that many activities (particularly routine maintenance) are a **"chore"**
- The **keener gardeners**, who were more likely to be older, found most if not all gardening activity as being "fun" or a rewarding activity.

The above research also found that gardening was often a **personal activity** rather than a family activity, though this was a tendency rather than an absolute.

In summary, critical issues are to:

- Move gardening away from being a **"chore"** to being of **interest to the individual**
- Identify appropriate **positioning routes** based on what the individual values and what experiences they enjoy. This needs to relate to both gardening activity and expenditure
- **Segment the market** based on values and motives, including meshing of these issues with existing segmentation models
- Develop more specific **branding and communication messages** in line with values and motives.

C. Media Attention and Other Sources

For many years now, gardening, outdoor and lifestyle programs and magazines have been very popular. They do not however necessarily suit the needs of the garden and nursery industry, though research has indicated that consumers do learn from them and take notice of them.

The situation is similar overseas, and particularly the United States. MacCaskey (National Gardening Association, 2002) argues that gardening has become a mainstream media activity over the last decade, with television shows, magazines, and now Web sites are devoted to the subject. However, his argument is that these shows turn gardening into a "fashion" activity rather than a genuine interest in gardening.

A salient issue is the extent to which the media is **adding value** in terms of gardening behaviour and expenditure. Our own research has indicated the following:

- Numerous **positives** are derived in terms of product ideas, greater interest in gardening and positioning gardening and the garden itself as fun and interesting
- For some, their own **inadequacies** are highlighted. For example, some TV gardeners make it look very easy yet this can be counter-productive in that it can de-motivate viewers who do not find it as easy
- Watching gardening is for some a **substitute** for actually doing it. That is, time spent watching gardening programs is seen as entertainment and not a driver of gardening behaviour.

A key issue will be **leveraging the media**; how can the industry benefit? The media may raise the profile of gardening though a bridge needs to be built between the media and benefits to the industry.

As yet, there does not appear to be a lot of direct evidence that the media strongly influences purchasing. The SMTM report (2001) found that point of sale and promotions are extremely important in generating sales, with visual stimulus being important in that 26% of sales come from impulse purchases.

There is a gap here is that point of sale and visual promotions do not in their own right get people to come to garden centres. We will need to consider ways of **stimulating traffic** as a precursor of sales generation.

An Internet search also revealed that there are many data bases available, both locally and internationally, that can be used by gardeners. These data bases provide everything from basic gardening instructions and tips to articles on the therapeutic and health impact of gardening.

A search on “Gardening Trends” revealed thousands of articles about the latest trends in gardening. For example, the “hottest looks” for gardening, environmentally friendly gardening, organic gardening, etc. No specific themes emerge other than the fact that there are millions of “new looks”, “today’s essentials” and “new favourites”.

Home and Garden magazine for example suggest that for 2002/03, trends include sub-tropical plants, exotics, bigger plants (“minimalism is out”), pebble, feature walls, and the “near cluttered” look is “in”.

Overall, international and local web sites talk of “chic”, “hip”, “groovy”, “new”, “edgy”, etc, are common in magazines and articles.

Key implications are as follows:

- The impact on sales of the media including Internet and on-line data bases needs to be determined
- If the media does stimulate sales, then the key issue is how to leverage the media to stimulate sales
- If the media has led to a fashion element in gardens, then how to capitalise on fashion.

D. The Environment and Water Conservation

Our 1997 report on the environment, along with myriad other studies conducted for government agencies, have clearly demonstrated the importance of the environment to consumers. However, there are a number of issues that need to be considered:

- The environment per se is seen as a **"macro"** issue that is too big for a consumer to have any control over
- Personal behaviour is often **tokenistic** in that is reduces personal anxieties and dissonance, though most is not really a major help to the environment
- However, many consumers will **pay extra** for products that are seen as environmentally friendly, which is a potential market opportunity is this motive can be leveraged
- At the same time, there is **little direct association** of their immediate backyard environment and the broader environment. It is only weakly associated with gardening. In short, it is "their" immediate environment, whilst the term "environment" is a global and national issue
- The 1997 study indicated that attracting **native fauna** and feeling part of the local Australian environment was important
- Similarly, 90% were interested in **water conservation** and there was considerable demand for information on both soil and water conservation.

Arzeena Hazir (Garden Guides, 2002, USA) identifies a trend toward **organic gardening** including provision of evidence that common herbicides and pesticides are carcinogenic. Hazir asserts that: *"The time has come to reassess our dependence on pesticides".*

Garden Guides also includes many articles on **water features** in gardens. Whilst not specifically related to drought or conservation, it arose more as a way of developing an urban oasis – particularly in dry areas of the United States. Neil Moran (Garden Guides, 2002) also suggests that fish add to the effect of an urban oasis.

The National Gardening Association (USA) argues that:

> *"Fear of environmental degradation, from global warming to loss of genetic diversity, drives many current gardening trends. Tree-planting campaigns can help cushion the effects of global warming. For landscaping, many experts recommend more reliance upon native plants or at least ones native to a similar climate." (Michael MacCaskey, 2002)*

Key Issues are as follows:

- What opportunities arise from concern about water usage and conservation?
- To what extent is environmental concern linked to interest in gardening? How (if at all) if that interest or concern manifest?
- How can environmental concern be leveraged to suit the garden and nursery industry?
- Will the “environmentally friendly” movement affect organic gardening and usage of chemicals? Is there a real move toward organic gardening at all?
- What messages or communication themes are useful in this regard?

E. Security and the Urban Oasis

Whilst personal security has been exacerbated since 9/11, there was evidence to suggest that the concept of an urban oasis was already in existence.

The above point suggests that we should consider the need for security separately from that of a haven. Past research we have conducted for the AHC and various government agencies has indicated that the concept of a haven – where the individual can isolate themselves from the world, go back to nature and develop an almost spiritual relationship with their garden – exists for some gardeners. This implies that is a **release**, and a place of **personal revitalisation and relaxation**.

We also found that keener gardeners were quite **sensory** in their approach to gardening, viz:

> *“One difference between the keen gardeners and others is that the former wanted to **look, touch and feel**, thus visiting nurseries, gardens and neighbours was of greater interest. It appeared that they had a closer affinity with gardens, thus books and the media were not enough for them.”*

The **nurturing motive** was also apparent in some, with our 1996 project finding that:

> *“….to the more enthusiastic members, gardening was a real source of enjoyment, excitement and reward; the first place they go for sanctuary or self expression in a busy, anxious world. This group loved growing a flower or a tomato, and had a close relationship with the garden as if it was a **child** (which explains the need for growth, change and adaptability). At the other end of the spectrum, it is not valued other than in terms of **outputs** (e.g., what you can do with it).*

Similarly, Hugh Mackay's research (2002) has come up with the same issues, viz:

- *"Consumers yearn to have some of their **'simple pleasures'** restored – including simple fun and even a bit of 'niceness' ".*
- *"Consumers want to enhance their lifestyles, protect and nurture their children, and create happy families".*
- *"There is a lot of talk about the work/lifestyle balance but few people believe they have achieved it".*

His conclusions were that:

- There has never been a better time to promote gardening
- Emphasise the relaxing, therapeutic benefits
- Talk about the pleasure of nature, creating a sanctuary etc.

Whilst we generally agree with his conclusions, the above is one of **several** important positioning routes, and importantly, these routes are likely to **vary across segments**. For example, Mackay refers on a few occasions to families, involving the children and nurturing the children. This is, as the ABS data has demonstrated, only one lifecycle segment.

In the United States, the motive for growing some herbs (e.g., horehound) has been found to be **medicinal** (Watson, 1999 "Garden Guides"). This implies that there can be direct health benefits, not just exercise and activity related.

At the same time, the **health related** benefits of gardening are well known, and numerous articles in the (USA) National Gardening Association's website (www.garden.org) have detailed benefits such as:

- Its ability to exercise all major muscle groups
- Weight loss (burning of kilojoules is as high as formal exercise like walking, swimming, etc, for medium to heavy gardening activity)
- Aerobic exercise leading to strengthening of the cardiovascular system (i.e., fitness)
- Flexibility and joint strength
- Disease prevention (diabetes, heart disease, osteoporosis)

A web search found numerous articles in Australian and international sites that describe the **health related benefits** of gardening, with several pointing out that it aids both the body and the mind. Note that a number of sites on ageing and senior citizens' resources have actively recommended gardening

Similarly, the NGA assert that appeal of gardening is also **connecting with nature**; experiencing the pleasures of colour, form, taste, and smell; and nurturing life. MacCaskey (2002) argues that this is part of city life, in that the isolation from a natural environment and its replacement with a built environment leads to gardening being an attractive form of connection to nature.

The University of Michigan (Rachael Kaplan, 1993) found that in a national survey:

> *"…more than 80 percent ranked "peacefulness and tranquillity" among gardening's top benefits"*

The article noted that: *"Nature is not just 'nice' ... it is a vital ingredient in healthy human functioning."*

Interestingly, Kaplan also found that in several cities, the incidence of **crime** had substantially fallen when the local governments had commenced community gardening projects. Her argument is that the cultivation of plants and our interaction with them is nourishing and rewarding.

The University of Minnesota (Larson et al, "Accessible Gardening for Therapeutic Horticulture, 2003) asserts that:

> ***Therapeutic Horticulture*** *is the purposeful use of plants and plant-related activities to promote health and wellness for an individual or group. A garden benefits you on many levels. One seemingly magical effect of gardening is stress relief. Emotional benefits of gardening may derive in part from the sense of the natural rhythm of life that plants and gardens impart.*
>
> *It can divert thoughts about yourself and your situation. In the garden, you can create and control your environment. This control is empowering. Gardening stimulates all of the senses, giving great pleasure and satisfaction. You can design a garden to challenge your strength and balance, or promote eye-hand coordination, range-of-motion, and endurance to just about any degree you want.*
>
> *Cognitively, gardening benefits the mind. Designing a garden and learning about plants and specific gardening techniques can be done in a number of simple or complex ways. And with books or classes, you can learn new things year-round."*

In summary, issues to be explored are as follows:

- What are the underlying motives and benefits that are associated with the concept of an urban oasis? The literature suggests that there are several drivers and that this is a broad issue
- To what extent is a feeling of security promoted by gardening, and how can this be leveraged?
- Similarly, how strong is the "nurturing" association with gardening, and what are the implications for gardening and also purchases?
- Are the health, well being and other therapeutic benefits recognised and valued?
- Is the connection to nature a separate issue from that of an urban oasis?

F. What do People Value?

Firstly, **human motivation** is:

> ***"The desire, need or intent (or set of) designed to achieve certain goals, via the performance of certain behaviours" (Dignam, 1985)***

Similarly, a "motive" is thus the **desire or need itself**, with behaviour then being designed to achieve that motive.

The concept of **value marketing** has developed out of human motivation; resources are invested in marketing activity that builds value, which is as follows:

$$V = \frac{\text{Perceived Benefits (PB)}}{\text{Price}}$$

In reality, the same paradigm applies for **time as well as expenditure**.

The challenge for the industry is to identify **consumer motives** at a fundamental level, and understand the **behaviours** they associate with them, and the **cognitive processes** (attitude formation, learning, sources of influence, etc) that underpin their behaviour.

The above was one of the main issues addressed in this research.

G. Learning to Garden

Our prior research in 1996 touched on learning effects, finding that:

- For most keen gardeners, interest in gardening started *"**when they were little**"*
- There was a **positive correlation** between the age they first started to learn to garden and their level of activity
- **Parents** were a main source of learning and influence, and seemed to reduce the incidence of learning by trial and error.

Marnie Pherson (PW Group, 2002) asserts that having parents teach you to garden at a young age (e.g., 7 years or so) gives people confidence, interest in and knowledge about gardening and nature, which is likely to be continued over the years.

The American Horticultural Association's 2000 National Youth Gardening Symposium reviewed a number of programs which sought to involve children as young as five years in gardening activity. Various speakers concluded that such programs equip children with an **awareness of and sensitivity to nature**, and that it helps them understand that plants as well as people are living beings. Little research evidence however is presented, though a number of assertions are made in relation to the long term behaviour patterns that are established as a result.

It is worth noting that the National Gardening Association in the USA has established a separate web site for kids and their gardening, including community based projects.

Experimental research by Sarah Lineberger (Texas A&M University, *"The Effect of School Gardens on Children's Attitudes and Related Behaviours Regarding Fruits and Vegetables*", 1999) has also found that children who engaged in gardening over time developed significantly more positive attitudes toward the consumption of **fruit and vegetables** and actual preference for eating them.

Emily A. DeMoor in a presentation to the International Congress on Public Education, Rio de Janeiro, September, 2000, said the following about children and gardening:

Gardening also engenders in children experiences conducive to the full realisation of democratic ideals – experiences of nurturing, connection, choice, responsible stewardship, decision-making, problem solving, empowerment, and equality. The natural world is the overarching reality by whose inherent laws and limitations all must abide.

Through gardening children learn that they have the ability to change things and thus attain a sense of empowerment. And, on a basic, practical level, research shows that children perform better in school when they are well nourished.

Overall, real data on the long term impact of learning to garden is rather anecdotal, and sometimes emotional. However, several benefits do appear to arise, including the commencement of a long term pattern of behaviour.

H. Accreditation Schemes

The Greenlife Buyers Study (1999) covered this issue in some detail at trade level. We found that to retailers, their interest was both in:

- Getting products that are **consistent in quality**, accepting that the accreditation will not in itself mean that they will be getting the "best" plants. Rather, if it minimises variability, then that would be an advantage. In short, consistency is about risk minimisation and quality assurance
- In the marketplace, they felt that accreditation should help give consumers **more confidence**, and if the scheme was marketed, it could add value.

The SMTM report (2001) found that:

- Currently, approximately 50% of all respondents are aware of the Garden Centre accreditation scheme
- 42% regard accreditation as important.

Clearly, **considerable progress** has been made in this regard. The key here is to define from the consumer's point of view the **marginal value added** and impact on purchasing behaviour as a result of accreditation, and their expectations of the meaning of these schemes.

I. Positioning of Garden Centres and Mass Merchandisers

Past research has clearly indicated that the traditional nurseries and garden centres and mass merchandisers are quite **differently positioned**, though obviously in competition with each other. The traditional model is more associated with service and advice, as well as larger shrubs and trees, whilst the mass merchandisers were more associated with tools, implements, general outdoor supplies like mulches and bark chips, as well as smaller plants.

The 2001 Show Me The Money study came up with similar findings, viz:

- The Nursery/Garden Centre segment is still the largest attractor of customer behaviour as measured by their reported trips per year to purchase gardening related products (10.2 trips, a slight decline from 10.7 trips)
- Over the same period Hardware has increased its share of trips from 6.4 to 8.3 trips
- It is clear from this study that consumers respond to two positionings in the marketplace. One is based on the Nursery/Garden Centre offer with its strengths of bigger choice, knowledgeable staff, perceptions that plants are healthier in these outlets; sometimes a great atmosphere that may involve a coffee shop
- 51% of people who shop Nursery do not shop Hardware. For many the main competition is other nurseries
- 58% of the respondents could articulate what they perceive to be the **latest trends.** Their answers clearly highlight that many in the industry have moved from being a local supplier of plants and gardening supplies to **purveyors of lifestyle.**

The above point raises the importance of gardens being a **fashion item**, a point made in relation to the effect of the media, above.

Importantly, a key difference was the that on most occasions, people plan trips to a garden centre, though in the case of mass merchandisers, most shoppers do not make a separate trip to mass merchandisers. However, the average value of each purchase was found to be lower at mass merchandisers.

The key issue for the industry however is to identify how **all types of retailers can add value** to what they do, by better understanding and responding to consumer needs and motives.

J. Image and Messages

No past research to date appears to have defined the ideal image for the industry, though our 1997 study went some way to defining it. In particular, it suggested that gardeners want to be **inspired**. However, it needs to be determined:

- What inspiration means to them; what are the images and ideas they think of
- How they can be related in practical terms to create the image that gives inspiration.

No specific positioning routes have been indicated in past research, though numerous messages and themes have been raised. At this stage, not a lot is known about the suitability of positioning routes.

K. Usage of Landscapers and Maintenance Contractors

Given increased work hours, higher disposable incomes and the benefits associated with gardening, there may be various commercial opportunities for advisory services, designing and building gardens and also maintaining them.

The research conducted by MD&A in 1996 and 1997 pointed to the need for **ideas and advice.** Many gardeners seemed to not know where to start, and needed help. For this reason, the need for inspiration was raised. At the same time, changing lifestyles suggest the need for the conduct of the work, not just ideas, including landscaping and general maintenance.

The potential demand for contractors and main benefits sought are not well known at this stage and need investigating.

L. Partnerships and Alignments

Alignments and collaborative strategies are now very common in many industries. The value of co-marketing is in its ability to **leverage the goodwill**, awareness etc of other organisations and make a larger whole.

There is no data available on the impact or relevance of collaborative arrangements. The key issue here is to identify means of adding value to the nursery industry, though collaborative arrangements that have some degree of synergy.

7. Summary of Qualitative and Survey Findings

This report summarises the findings from the consumer group discussions and the survey of 500 gardeners throughout Australia.

7.1 Introduction

As the five groups were recruited based on clusters and demography, it was not surprising that they were quite different in behaviour and some attitudes. It was also evident that there were regional (partly climate related) variations as well.

It was striking that the types of gardens varied at a regional level. Whilst this was partly due to demographics and segments, the following garden types emerged in the three centres:

A. ***Brisbane*** *(Cut flowers/bargain hunters and non-confident loyalists)*

Very few had elaborate gardens, with moderate interest in gardening being evident. Gardens were typically composed of the following:

- Lawn
- Large trees (for most), such as gums (occasionally described as “bush”)
- Shrubs, particularly natives that cope with hotter climates such as ferns
- Some exotic trees
- Vegetables, fruit trees or herbs (often in pots)
- Some traditional flowers like roses
- Pot plants, typically potted colour.

The male group (non-confident loyalists) often had a lot of bush and trees, and descriptions suggested rather rugged, unplanned or over-grown gardens. Some were renting and clearly did the minimum they could. However, many had large allotments making garden maintenance a lot of work.

B. ***Canberra*** *(Self-expressionists)*

This group were typically proud and very active gardeners. Styles and themes were as follows:

- Gardens were well stocked with a range of plant types, both big and small

- Larger tress were however uncommon
- The gardens were well developed, and well cared for
- Most had flowering plants such as roses, gardenias, etc
- Some described the garden as "courtyard" or "cottage" gardens
- A few had vegetable and/or herb gardens.

C. ***Sydney*** *(Green thumbs, New seekers)*

Typically well developed gardens were evident, a common word being "mixed", implying:

- A combination of trees and shrubs
- A mix of native and exotic plants
- Numerous flowers plants, including orchids, roses, azaleas, etc
- Some annuals
- Some potted colour
- Turfed and paved areas, sometimes used for outdoor entertaining
- Some water features
- Some fruit trees and vegetable gardens.

Overall, few had a specific theme, with variations and combinations being preferred. Most gardens were mature, though interestingly, some consistently sought to make their gardens "fashionable".

7.2 Learning to Garden – Chores and Experiences

After the first few groups, we changed the order of the groups, commencing with their first experiences, then moved them forward to the present time.

For most gardeners, experience with gardening commenced at a young age, often less than ten. Group members often talked of their early experiences as if it was a yesterday.

There were a few central issues arising from this discussion:

- Many saw these early experiences as **"chores".** The tasks mentioned were typically mowing, maintenance tasks, weeding, raking leaves, etc

- Many pointed out that their **enjoyment at a young age** came from:
    - "Creative input"
    - Specific projects (planting vegetables, seeds, flowers, etc)
    - Having control over and responsibility for the project
    - Being encouraged rather than instructed ("learning experiences")
    - Having a family that valued gardening
    - Being encouraged at school (some mentioned school projects).

- Not all liked gardening at this point in time. Many were **reluctant**, viz:

  "My parents dragged me out"

  "…raking the leaves…plenty of chores…"

  "I hated it"

- At the same time, some took to it automatically, and needed little encouragement:

  "I helped maintain mum's plants…I loved it"

  "We played together… not (seen as) work"

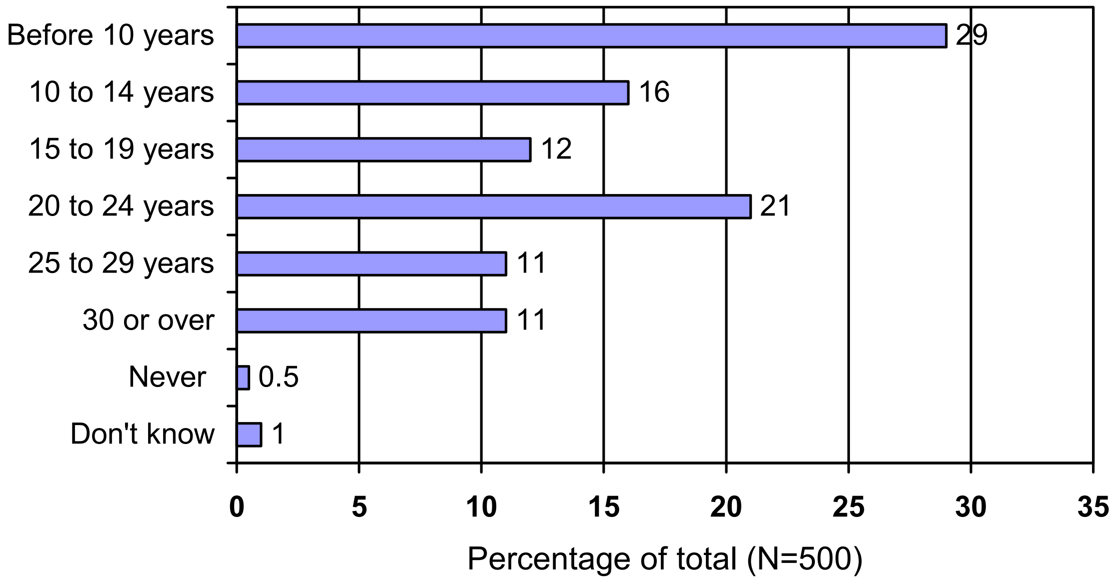
  "I wanted to grow things"

  "All my family were interested in gardening"

The last point implies that some simply liked the activity the first time they started it, yet one person argued that this like of gardening was driven from a keen family interest. By the time they first started to garden, their family had **reinforced** such an interest, including the value of growing vegetables and fruit (which were short after the war).

The survey phase found the following in terms of their age when first gardening:

Figure 1 - Age when first started gardening



The above figure indicates that **people commence at different** ages, and whilst many started to garden before the age of ten, it was also common to start to learn at twenty years or over (43%).

Those starting before ten years of age were more likely to be:

- Town (36%) rather than city residents (25%)
- Green thumbs (38%) compared to all other clusters
- Those most interested in gardening (34%).

Whilst the above suggests that starting early is correlated with greater interest in and involvement in gardening, it was also apparent that 15% of the “very interested” group first started to garden when aged 30 years or more. Only 8% of all others started at that age.

Interestingly, most agreed that they enjoyed gardening at **a young age (79%).** The remainder were less likely to have enjoyed initially:

- Residents of Perth (58%) and the ACT (50%)
- By cluster group, bargain hunters (60%) and the time poor (69%), compared to green thumbs (96%), self-expressionists (87%) and new seekers (87%)
- Males (72%) compared to females (82%)

- Younger gardeners; 70% of those aged less than thirty years did not initially enjoy it, compared to 87% of those currently aged 60 years and over.

Of those saying that they did **not enjoy gardening** when they first started, it was apparent that 40 respondents (8% of the total or 39% of those not liking gardening initially) said that they **never** liked gardening. Of the remainder, most started to like it when they were at least twenty years of age (54%), of which 37% said that they were thirty years or older. Only 5% said that they started to enjoy it before the age of 15 years.

The survey results are congruent with the qualitative findings, and independence or home ownership arose as a major driver of interest in gardening. However, there are few simple rules here.

Whilst **starting age** was clearly an issue, it was not a simple one. Gardening can become a **passion at a later age**, though it is apparent that is does help if they are encouraged to garden at a young age.

In summary, **many factors affect their interest**, though the **family and school environment clearly has a major effect**. Yet the age at which they start gardening appears to be less important than the **circumstances**, the support, the types of tasks, and the control that the young gardener has over them.

Noting that not everyone liked it initially, a few drivers of **later adoption** arose in the qualitative phase:

- For many, purchasing their **own house** was a turning point, and led to some pride in their behaviour
- It was common for some to turn away from gardening in their teens or early twenties for a number of reasons, and then **re-develop an interest in it**
- Later adopters sometimes developed an interest when a garden was **planned for the first time**, meaning that they needed a project to become interested. Note that we found 60% either had no garden at all, or a partial or incomplete garden when they moved into their existing dwelling
- Some learned from their neighbours over time.

Our main conclusions are that whilst an interest in gardening can develop at any age, it is more appropriate to use resources to target **children at school** and **new home owners.**

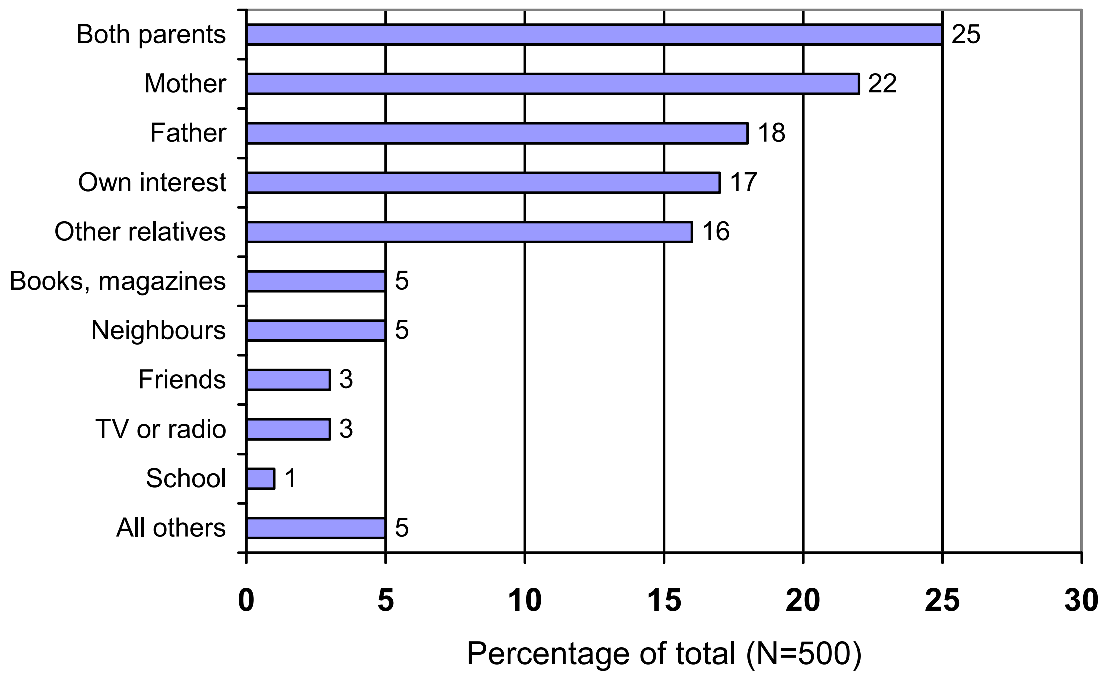
7.3 Drivers and Influences on Gardening Interest and Behaviour

At an **early** age, near family was clearly the major source of influence, with mothers being slightly more likely to be the main source of influence. Also note that other relatives played a role.

Some also relied on their own **curiosity**, though as we noted earlier, this curiosity was found to be correlated with having a family that valued and encouraged gardening activity.

Note that friends and the school environment were only occasionally mentioned as a source of influence. We found in the groups that school projects were sometimes mentioned, and when it did happen, these gardeners arose as being particularly interested in gardening. Yet at the same time, other influences also had to be present (e.g., parents) to stimulate that interest.

Figure 2 - Who taught them gardening in the beginning



We sought to determine the relationship between sources of influence and interest in gardening, and the data indicates that no initial source stands out as different to other groups. There was some variation across the clusters, though the main finding was that the keener gardeners (Green thumbs, New seekers) were more likely to have relied on the media.

A **gender shift** was also apparent in that:

- The older gardeners were more likely to have learned from their **father** (28%) compared to their mother (17%)
- The youngest group (under 30 years) were much more likely to have learned from their **mother** (36% compared to their father (9%)
- The above pattern was consistent across all age groups, and was statistically significant. Mothers are becoming the primary teachers, with males lessening their role. Similarly, the main gardener is the sample was 69% female, higher than in previous years.

In terms of how they learned **after childhood**, it was obvious that many learned simply **by trial and error**. Taking a hands-on approach and often not asking for help, learning progresses as plants die or live, and projects work out or not.

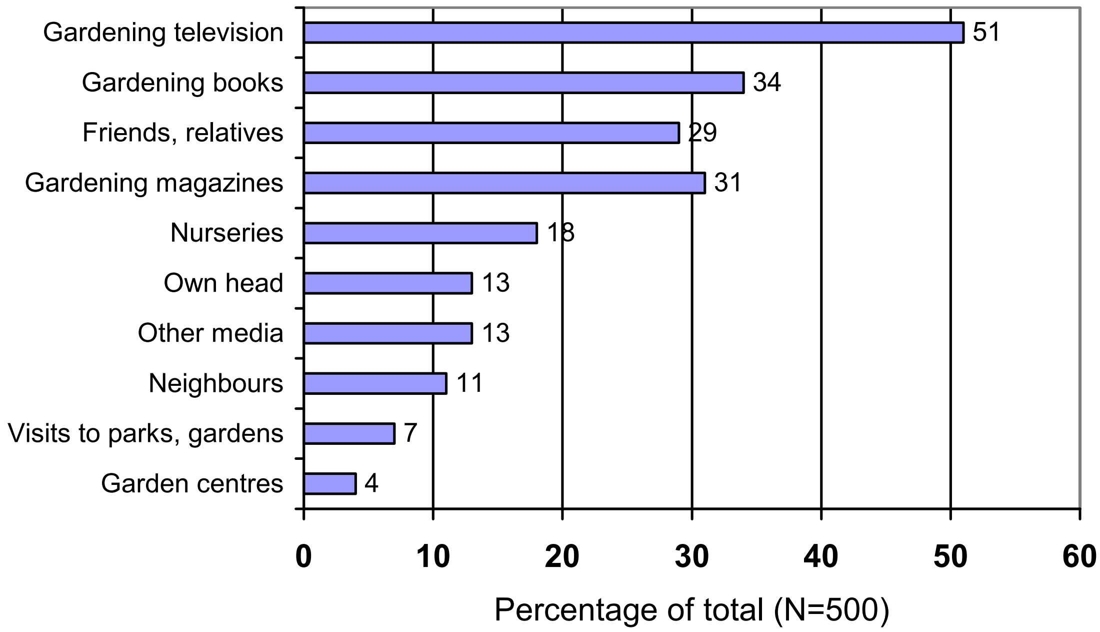
Again, much of the trial and error was associated with establishing a new garden or modifying an existing one, at the time when a house is purchased, which arise as a critical time in learning about gardening and actually spending money on a garden.

Over time, a number of sources were mentioned during the group discussions, and the following arose as the most common:

- Seeing **other gardens** first hand, be it neighbours, friends, open houses, historic houses, etc. This was particularly liked by the more enthusiastic gardeners who found other gardens to be useful sources of inspiration
- A **competitive streak** was evident in relation to other gardens in the street. Some keen gardeners in particular view their garden as part of the street, and sourced ideas from them. Also note that those with poor gardens were seen as "letting the street down"
- Most mentioned various forms of **media**, such as TV shows, magazines, radio and newspaper columns
- The keener gardeners in particular mentioned **books**
- **Nurseries** themselves where a useful source to many, though mainly to the keener gardeners.

In the **survey**, we asked respondents to describe their main sources of information over the years, rather than any one time period. We found the following:

Figure 3 - Main information sources over the years



Note that a few other sources were mentioned, each by a small number. Clearly, There are a handful of major sources for ongoing learning, viz:

- The **media** clearly has a major impact, with TV, books, magazines, newspapers, radio and even the Internet having a considerable impact
- The local neighbourhood including friends and relatives appears to play a considerable role, with parks and gardens also being a source to some
- Nurseries and garden centres were also useful, though not as frequently relied on as the media.

The following table highlights information usage by cluster group:

Figure 4 – Main Information Sources by Segment

Information Sources	Cut flowers %	Bargain Hunters %	N/conf loyalist %	Self-express %	Green thumb %	Time poor %	New seekers %
Gardening TV	51	42	**63**	**59**	**59**	40	**64**
Gardening books	29	**23**	39	38	40	32	36
Gardening magazines	35	39	39	35	31	**28**	37
Friends/relatives	29	**33**	22	**31**	23	29	21
Nurseries	10	6	20	**30**	18	13	**26**
Other media sources	11	12	15	16	**21**	17	13
Own head	10	**6**	12	14	17	14	10
Neighbours	10	11	**14**	**15**	9	6	6
Visits to parks/gardens	9	5	3	10	**17**	5	10
Garden centres	**12**	8	0	6	2	4	3

Overall, the keener gardening groups rely on **more sources**, the media in particular. Bargain hunters and the Time poor are less driven by the media.

Similarly, those saying that they are very interested in gardening used more sources, and relative to others, they relied more on books, nurseries and visits to gardens and parks, making them more active seekers of ideas and information.

By gender, females were more likely to rely on nurseries (20%) and magazines (35%), males being more likely than females to use other media sources (18%), though overall, males used less sources.

Usage of information sources was also strongly affected by **occupation and age**. Overall:

- Older persons were more reliant on books than other groups, particularly pensioners, yet magazines were more popular in the middle age groups, and among non-working women (though not retired women)
- Television was popular across the board, but more to blue collar workers, then white collar, and less to those not in the workforce
- Friends and relatives were a more common source for younger people as well as white collar workers, though neighbours were relied on more by those in their fifties
- Other media sources (e.g., radio and newspapers) were particularly popular among the older age groups, and rarely used by those aged under 30 years

- Nurseries and garden supply centres were used quite evenly across these groups, though more so by non-working persons.

During group discussions, we probed the value of the media, in relation to its value as a source of real **information and influence or as entertainment**. Responses were as follows:

- The TV shows like Backyard Blitz, Burke's Backyard and similar were seen as useful, but more entertainment than knowledge. Interestingly, many immediately reacted that they are useful sources, though later qualified their comments on the basis that they are more **project related** and would be useful only if they were looking to change their garden. As such, they were more entertainment than information
- The ABC and more specialised media (print, radio and TV) were often mentioned as **sources of ideas and inspiration**. TV and magazines had the added benefit of colour and appealed to their senses. Whilst still entertaining, mainly were convinced that they do rely on them for information
- The TV programs and to some extent magazines do influence **"fashion"** to some extent. There was occasionally said to be an element of "keeping up" with trends (e.g., an all white garden) or being presented with "in" plants
- Whilst TV can make gardening look "easy" and "fun" and "creative", there are a few downsides. It can **make the task look "too easy".** For example, the soil is perfect, the presenters re-build the garden in a day and make complex tasks look too easy to be true. The risk is that they can work to de-motivate or disillusion gardeners, but this appeared to be an occasional rather than regular event
- There was **little evidence** that gardening shows just give you a "fix". Interestingly, some felt that the idea of a "fix" was more associated with cooking programs
- A few other criticisms of the media were that the plants they talk about are not suitable for their climate, or that they are not always available. They were however relatively minor issues.

Overall, the media did arise as a **useful source** of information, but some did take it with a grain of salt. It can **inspire and stimulate people**, though a few weaknesses were evident. The mass media arose as more useful for big projects, not maintenance, though in itself, that is a useful outcome. Few could however point to starting projects based on media coverage.

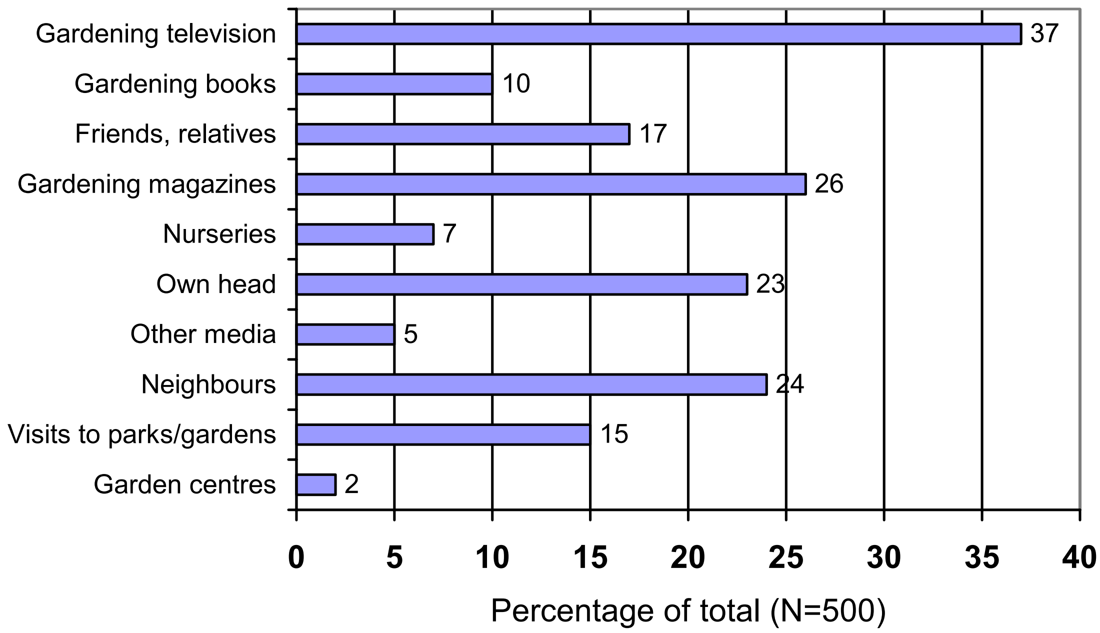
When asked during groups what it the **best way of getting information**, the answer seemed to depend on how interested they are in gardening, viz:

- The keenest gardeners preferred books and magazines, liking the visual content, and were prepared to read detail
- The Internet was noted by some, and seen as useful as it can provide visual stimuli
- Younger people liked TV, though to a lesser extent by the keen gardeners. It arose as being more suitable for beginners and less experienced gardeners
- A few also mentioned nurseries and other hand-on sources, both young and old.

7.4 Sources of Inspiration

The group discussions suggested to us that there is a difference between **inspiration and information**. The keener gardeners arose as being sensory driven, and liked to touch and feel plants. In the survey, we asked all respondents what their main sources of information are, with the following emerging:

Figure 4 - Main sources of inspiration



Relative to all sources of information, inspiration comes more from visual media such as television and magazines, as well as neighbours and their gardens, parks and gardens, as well as their own imagination.

Note that only 9% combined mentioned nurseries or garden centres, which implies that they are of secondary importance as a source of inspiration.

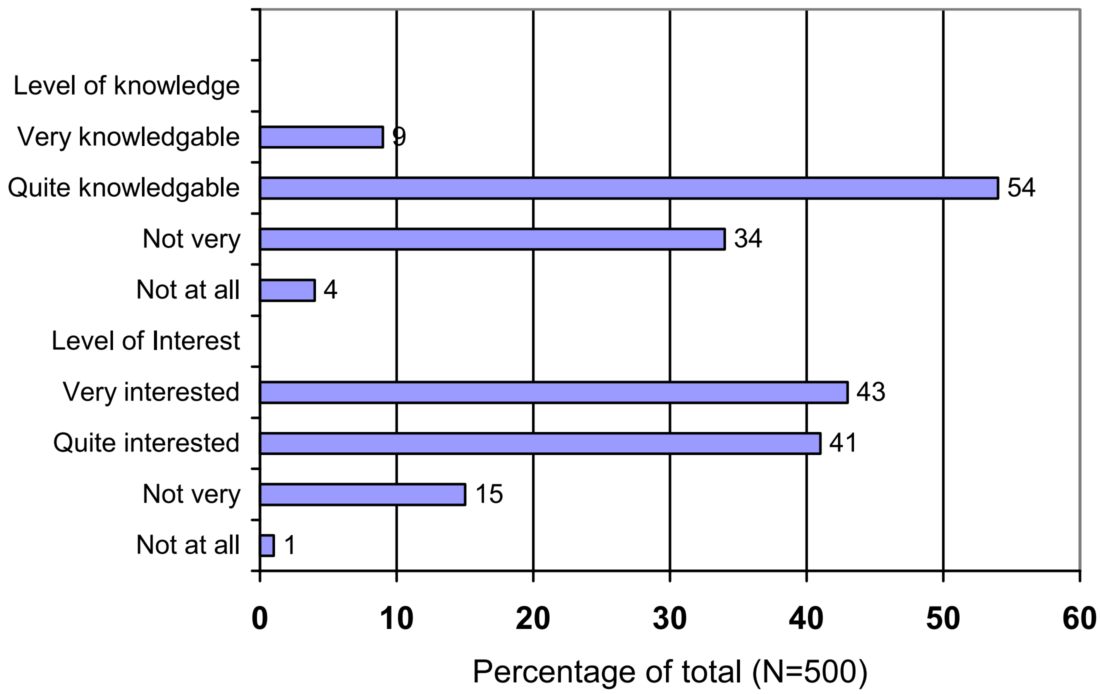
As per sources of influence, there were many variations based on segments, demographics and other variables. We make the following points:

- TV was particularly popular among New seekers (56%), less so among Time poor (26%) and Bargain hunters (32%), as well as females (41% vs. 30% of males)
- Magazines were used less by the Time poor (14%), more often by females (30% vs. 15% of males), and middle aged groups
- Gardening books were relied on more by upper white collar workers and the late middle aged
- Neighbours are sources of inspiration more often to Bargain hunters (34%), less to Green thumbs (12%) and non-confident loyalists (17%)
- Those most interested in gardening were more likely to say that they rely on their own imagination. Interestingly, we later found that they often do not like others suggesting anything. This response was also more associated with Green thumbs, which is hardly surprising
- Visits to parks and gardens were of more use to those in non-metropolitan areas, females and blue collar workers
- Nurseries and garden centres were of more use to Self-expressionists, city dwellers, females, and late middle to older ages.

7.5 Knowledge of and Interest in Their Garden

During the group discussions, it become obvious that there were large differences between segments as well as individuals in relation to their interest and knowledge of gardening. In the survey, we sought to quantify this, with findings being as follows:

Figure 5 - Self-reported Knowledge and Interest



Overall, interest was greater than knowledge. Of the total, 43% were very interested in gardening, yet only 9% rated themselves as being very knowledgeable about gardening.

Similarly, 38% agreed that they are "not very" or "not at all" knowledgeable about gardening, with Victorian residents rating themselves as the most knowledgeable, and those in Queensland the least.

Knowledge and interest varied considerably across the segments, the mean values being highlighted overleaf:

Figure 6 – Main Information Sources by Segment

Knowledge and Interest in Gardening	Cut flowers %	Barg. Hunters %	N/conf loyalists %	Self-express %	Green thumb %	Time poor %	New seekers %
Very knowledgeable	7	5	9	16	29	6	11
Quite knowledgeable	45	34	51	63	61	38	70
Not very knowledgeable	37	52	39	22	10	51	18
Not at all knowledgeable	10	8	1	0	0	5	1
Mean	**2.39**	**2.38**	**2.68**	**2.94**	**3.19**	**2.45**	**2.91**
Very interested	20	11	56	71	74	21	52
Quite interested	37	46	34	28	23	49	33
Not very interested	36	40	10	2	3	24	15
Not at all interested	7	4	0	0	0	6	0
Mean	**2.68**	**2.64**	**3.47**	**3.69**	**3.70**	**2.85**	**3.37**

Overall, the Green thumb segment considered themselves more knowledgeable than any other, and equally with Self-expressionists, were the most interested. Note that there were big differences particularly in interest, across these segments.

Other than segments, interest was more closely correlated with demographics than was knowledge, with:

- Females being significantly more interested than males (47% vs. 35% "very" interested)
- Interest steadily increasing with age, though being stable over 50 year of age
- Retired persons the most interested (61% "very"), less so among lower white collar (37% "very") and blue collar workers (33% "very").

We also noted in the group discussions that most keen gardeners saw themselves as being **outdoor rather indoor people**. In the survey, we found that:

- 63% said that they preferred outdoor activities
- 23% rated indoor and outdoor activities equally
- 14% preferred indoor activities.

At a segment level, note that the Time poor (25%) and Bargain hunters (19%) were more likely to be indoor people, particularly compared to Green thumbs (3%) and New seekers (8%).

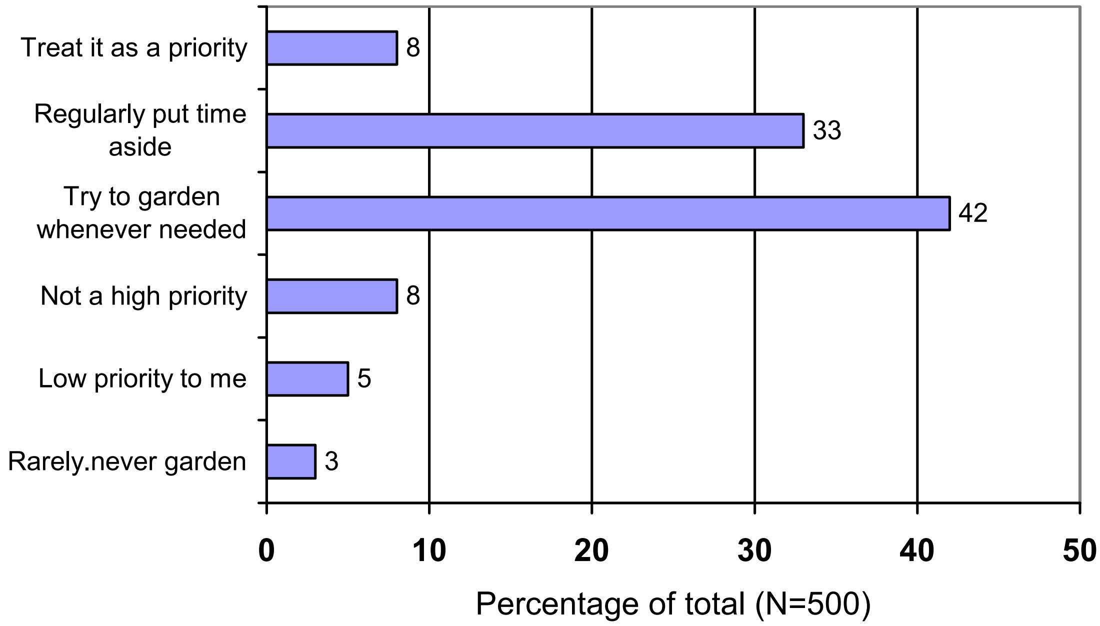
7.6 Gardening and Time Management

We asked people to discuss how they manage their time, whether gardening in planned and how regularly they garden. We make the following points:

- Overall, time allocation varies considerably, though for most, it needs to **"fit in"** with everything else
- For younger people, the kids generally come first, though some had been able to turn gardening into a family activity, and had actively sought to involve the family in gardening. Yet it was a **personal** activity to most
- Most if not all were **outdoor people** and quite liked gardening, though it was only one of numerous activities they allocated time to
- Most gardening activity, except for the keener gardeners, was unplanned, and was often seen as being **"reactive".** That is, the **garden** tells you when it needs attention
- Those reacting to the state of the garden felt that they sometimes battle to keep it in **"control".** Only the least interested gardeners would wait until it was overgrown
- Major projects were an exception, and they required a **budget** for both time and cost
- The keener gardeners saw it as a **higher priority**, some saying that they never have trouble finding time to garden. Yet this was a **minority**, and they deliberately set time aside
- For numerous keen gardeners, they used the garden as a **release**, and would potter around after work or on a regular basis. This commitment was often seen as "unplanned" though in reality, it is a routine behaviour, though the activities per se may be unplanned
- It was common that once they get out there in the garden, they spend more time than they ever planned
- Most did recognise that it was a matter of priority. The Canberra group in particular were active garden lovers and gave it a high priority. They assigned time willingly. At the other end of the spectrum was the younger males in Brisbane, who had other priorities
- When asked if they would spend more time in the garden if they had an extra day a week, the responses were again similar. Some said they would do anything but garden if they had a free day, others saw it as a high priority.

The survey found that respondents were quite distributed across the range of options we gave them, viz:

Figure 7 - Time allocated to gardening



Overall, gardening was a priority to 41% of the sample, with however only 8% seeing gardening as a higher priority than other activities. Most fell into the two middle categories, in that case, respondents try and garden in a logical, organised manner, though other activities will sometimes or often take precedence.

Not surprisingly, the Time poor and Bargain hunters were significantly less likely to rate gardening as a priority, and Green thumbs, self-expressionists and New seekers in that order saw it as a higher priority.

Whilst older respondents were more likely to rate gardening a priority, the relationship was not consistent. Similarly, the age when they first started to garden was a predictor, though was not a consistent indicator.

In terms of **spending money**, it was apparent that the cost of gardening was **not a great barrier** to most. We make the following points:

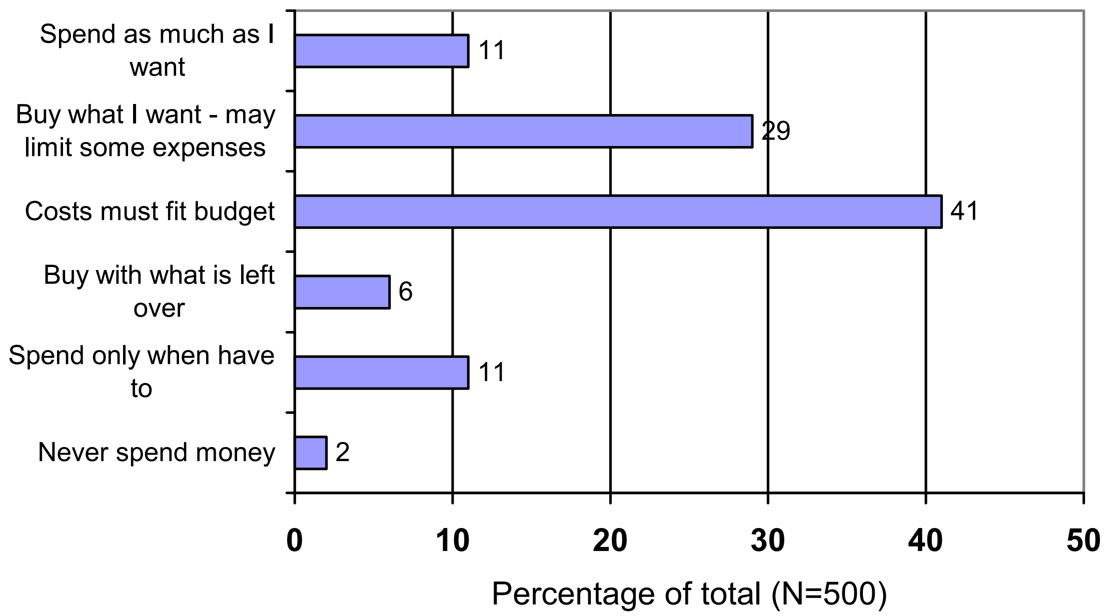
- Most thought that gardening is **labour rather than cost intensive**, and that you can do it with little expense

- The main cost items were described as **"projects",** and often include hardscape as well as greenlife. Note that those with mature gardens felt that they had "done all the big spending". Projects are thus a limited activity and are related to their stage of life. Budgeting was more associated with projects than with maintenance
- Those interested in gardening found this expenditure easy to justify and saw it as good value for money
- Most small plants (annuals, shrubs, etc) were seen as relatively cheap to buy. When the budget is pressed, they can also rely off cuttings or seedlings
- Lots of **bargains** were also said to be around. Many do shop around, and will hunt down specials at K-Mart or Bunnings or at markets, though others will not. However, few will refuse a bargain and there was little evidence of snobby behaviour
- Spending was seen as being **relative to their income**, and most were happy with limited expenditure. Rarely does the garden have to compete with other activities in terms of cost
- While time is a trade-off, there was less evidence to suggest that cost is a **trade-off**. Given the bargain hunting, that is not surprising.

The survey results largely confirmed the above, though for many, garden related purchases still have to **fit in with their budget**. Figure 8 overleaf suggests that four in ten generally or always buy whatever they want, the remainder either budgeting or limiting their expenditure.

Noting that many said during the groups that they can easily find affordable items to buy, our conclusion is that whilst most gardeners have to work within a budget, it does not seem to be a major limitation for the most part. Clearly, cost limits some expenditure, but respondents saw it as limiting the big projects, rather than minor purchases including maintenance.

Figure 8 - Budgeting and gardening expenditure



Based on segments, findings were predictable, with Time poor and Bargain hunters more often spending money only when they have to.

The notion of **value for money** was also confirmed, with:

- 47% saying that their expenditure on the garden "definitely" gives them value for money
- 45% said it "probably" gives them value
- Only 6% said either "probably" or "definitely" no
- Interest in gardening is strongly linked to the perception of value for money. Nearly two thirds of the "very interested" group gave a "definitely yes" response to the value question
- Similarly, two thirds of the Green thumbs gave a "definitely yes" rating to value for money, followed by Self-expressionists and New seekers (56% and 54% respectively).

7.7 Motives and Drivers

The groups indicated that there are many drivers of gardening, and whilst they can be grouped together generically, **most people mentioned multiple drivers**. For example, some were driven both by the pleasure they derive from gardening, as well as the sense of achievement they receive.

For the keen gardeners, who see it as a priority and have some order in terms of assigning time to gardening, it is a long programmed **pattern of behaviour**, which is reinforced both by the **pleasure** (escape, fulfilment, therapy, peace, rejuvenation, exercise, etc) that they derive from gardening, as well as its **outcomes.**

A summary of key drivers is as follows:

- The (pragmatic) need to **keep control** over the garden, or keep it neat and tidy. This is not associated with keen gardeners to any degree. To some extent, this positions gardening as a **necessity**
- Being **outside in the sunshine**, or the chance to get out of the house or office. Again, note that many are outdoors people, and simply being outside
- Keeping the garden **looking good**, which is more than keeping it under control, like taking it to another level
- To attract **birds**, though this arose as a minor driver, though more often, gardening puts you in **touch with nature**
- The **aesthetics** of the garden - scents, colours, as well as shade and cooling. Particularly to keener gardeners and females, the garden was associated with **beauty**
- The **health benefits** of gardening – physical activity or exercise were associated with gardening though did not appear to be major drivers
- **Pride** – which is a combination of wanting to keep up with the neighbours, to maintain the integrity of the street, and particularly express their creativity and endeavours publicly
- The **satisfaction and positive emotions** that gardening provides, such as being therapeutic, relaxing, peaceful and enjoyable
- The above implies that the garden is an **important personal space** to many, like an oasis. They can express their own personality, and can **get away** from the normal pressures and anxieties of the world in the meantime
- The endless **challenge** of a garden which continues to **change and develop**, involving them in constant learning and experience

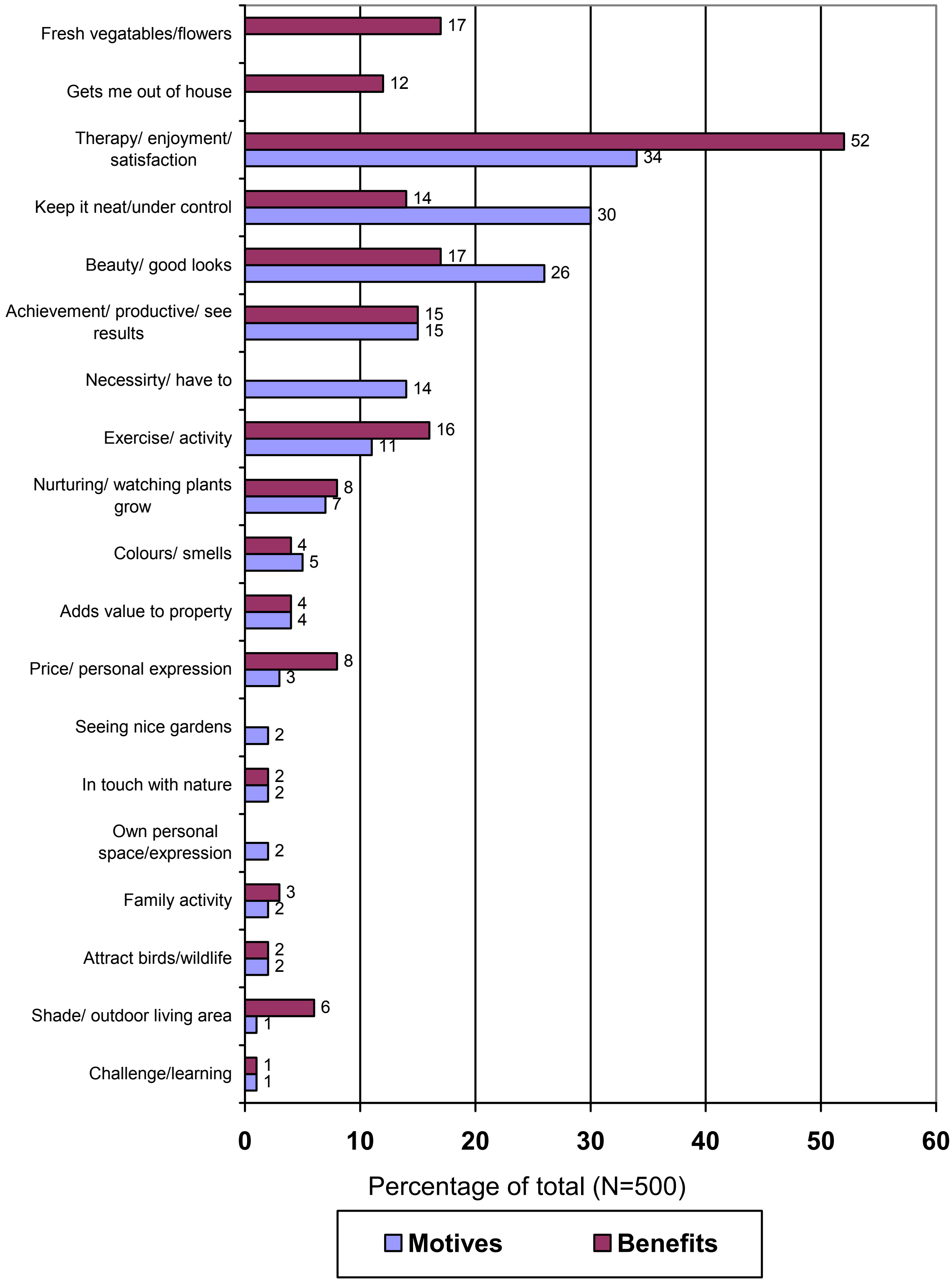
- The **sense of achievement they get** – seeing the results of their work. This can also include producing something tangible like flowers, fruit or vegetable, though not necessarily. It can be simply seeing a result from their effort
- Aligned to the above, is the sense of **nurturing** - seeing things grow, watching plants mature and develop. This was more apparent with females, though was a driver to more older gardeners who no longer had children at home
- Gardening is a **good family** activity for some. However, it arose more often as a **personal activity**
- A nice garden adds **value to your property**. Whilst sometimes a driver, many did not think that this would be the case (note that other research we have done has indicated that it adds considerable value)
- It makes the **outdoors more liveable**, providing shade, improving the living area and making it more friendly and inviting.

Next, they were asked to describe the outcomes or **benefits** they receive from gardening. Overall, the responses were the same; they largely treated the motives and benefits as the same attribute. However, there was more emphasis at this point on end benefits such as:

- The sense of **achievement** when they look at and use the garden
- **Pride** and self-expression
- Having an outdoor area that is **useful**
- A **good feeling** – both physical and in terms of personal satisfaction.

The survey phase also indicated that there are numerous motives, this unprompted question revealing the following:

Figure 9 - Main motives for and benefits of gardening



The above indicates that the two are related, though the benefits were predictably more outputs-based. Overall, we make the following comments:

- The single main driver was the **satisfaction, enjoyment or therapy** they receive from gardening
- The main drivers and benefits are **individually focused**, not family, environment or wildlife driven. The implication is that marketing needs to avoid socially responsible messages and focus on individual needs and benefits
- At the same time, some other benefits (health, added house value) are real, and can be marketed though should be seen as a longer term project
- **Tangible benefits** such as achieving a goal, producing flowers, vegetables or fruit, having beauty or colour, and simply the sense of achievement from these activities, were all important drivers.

In terms of the **segments**, it was evident that the keener gardeners like Green thumbs, New seekers and Self-expressionists mentioned more benefits and drivers. We make the following points in relation to benefits:

- **Cut flowers** were, relative to other segments, more often saw the need to keep the garden neat and tidy as a driver (26%), and to a lesser extent, the beauty of gardens (19%)
- **New seekers** more often mentioned the sheer enjoyment and satisfaction form gardening (65%), and being able to produce vegetables or flowers (28%), as well as being out in the fresh air (18%)
- **Green thumbs** mentioned a number of drivers, rather than any one in particular. However, they were achievement focused
- **Self-expressionists** were similar to Green thumbs, though less driven by organised or tidy gardens
- **Non-confident loyalists** mentioned having a shaded or attractive outdoor area more often than others (15%), yet results were close to average for each benefit
- The **Time poor** were less likely to mention enjoyment (44%) than any other cluster, though that still remains the main benefit. They were more likely to mention having an attractive, beautiful garden (20%) than any other group, and 20% also mentioned having a neat, tidy garden. This group find the doing less satisfying than other groups

- **Bargain hunters** were the most likely to mention a neat, tidy or organised garden (22%), and were also more likely to mention colour and smells (13%), though for the most part, were less likely to mention just about any benefit.

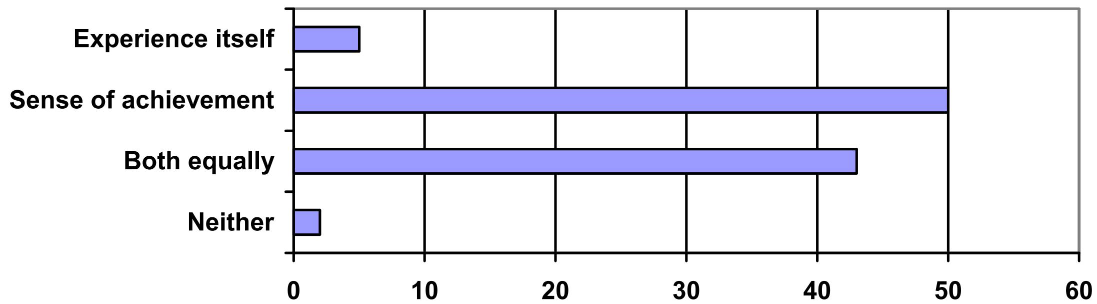
Overall, after the qualitative phase, we gained the impression that for marketing and branding, **outcome** based drivers would be more useful on the basis that those really enjoying gardening liked both the process and the outcome, yet those with less interest still liked the outcome. However, the survey demonstrates the importance of **enjoyment and relaxation**.

For some respondents, the outcome can be presented visually, and **sensory aspects** like colour, cooling, aromas and even the feel of plants (nature) lead to positive emotional reactions.
We sought to clarify the issue by asking what was more important to them:

- The experience of gardening itself
- The sense of achievement they get from it
- Both equally.

The result was that few rated the experience as more important (5%), moist split between achievement (50%) or both equally (43%), viz:

Figure 10 - Main driver - process or outcome



Overall, whilst the **experience** of gardening was a positive outcome in its own way, the benefits are **physical, emotional, practical and aesthetic**. We gained the impression that these key benefits are more useful in marketing than experiential benefits, as even the satisfaction derived from gardening can be an output, not a process. Satisfaction seems to be derived more from what they achieve, rather than the act of doing it.

7.8 Water Shortages and The Environment Per Se

Given the extent of the drought in January 2003, it was not surprising that there was widespread concern about the drought. All cities were badly affected, and that could reasonably be extended to the other mainland capitals.

During group discussions, the initial reaction was a degree of concern. Some changes have been made, though few were structural, viz:

- A few had put in water tanks, but this was occasional
- Many had made minor changes to reduce water, such as recycling grey water or putting in drip irrigation
- Other simply said that they were trying to conserve water by less watering
- No annuals this summer
- Mulching was quite common.

Yet most admitted that the above were **short term measures**, and that it the drought breaks, it will be back to their old ways. On the other hand, there was some evidence of real change, and the learning processes may take some time to be extinguished.

The survey found similar results, with 76% indicating that they had made some changes as a result of the drought. Yet again, most of those changes were related to using less water. Of the 382 respondents making any changes, the most common were:

- Conserving or using less water (76%)
- Mulching (23%) or composting (3%)
- Re-using or recycling water (e.g., grey water) (22%)

Also note that 5% said that they had put in a watering system, which potentially uses more water, no less.

Other mentions were less frequent, though had **greater implications** for the nursery and garden industry:

- Planting different plants or shrubs (9%)
- Buying or planting less (7%)
- Do less or no gardening (6%)

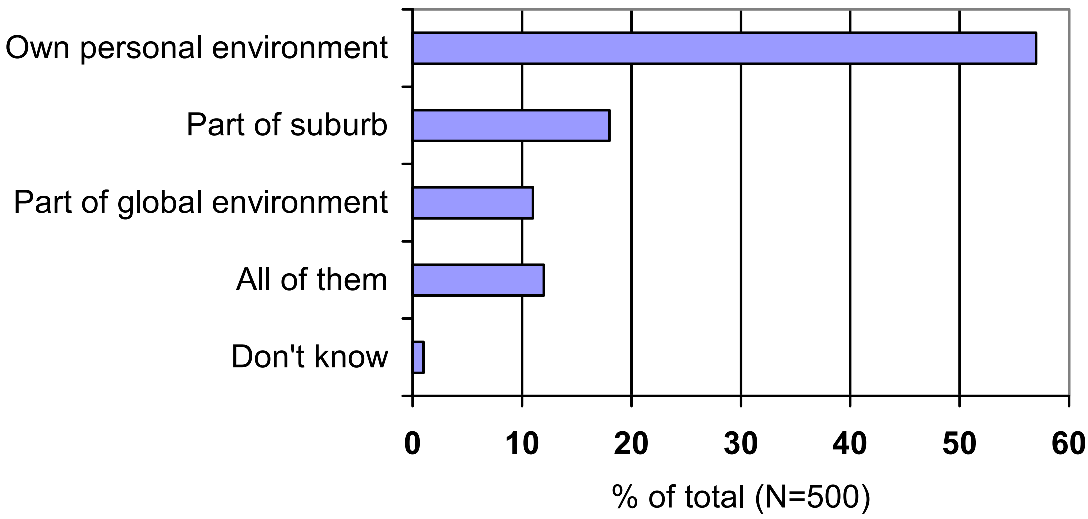
- Removing some plants or shrubs (4%)
- Putting in a water tank (3%).

The above suggests that the drought has reduced gardening behaviour and also less purchasing of plants and presumably supplies as well. However, more normal weather later in the year may lead to a re-bound.

In terms of what plants they consider to be **suitable in dry conditions**, the typical response was **"natives".** The better informed however qualified their response in that only some natives are suitable for dry conditions. When we probed them, they elaborated to some degree. Plants mentioned included wattles, bottlebrush, bougainvillea, acacias, gums, etc. They excluded flowering plants and exotics in some cases.

When asked in the survey, responses to how they relate to the environment were as follows, with New seekers being the most globally focused:

Figure 11 - Environmental level of their garden



Based on the qualitative findings, the above may be optimistic, including some degree of socially acceptable responses. The groups indicated that **very few considered themselves to be keen environmentalists**, and their concept of the garden was mainly their **own personal space**, not a continuation of the broader environment. This was less evident in the survey, though only 12% said that they see their garden as part of the global environment.

Based on the qualitative research, we make the following comments:

- The older gardeners have put a **lot of effort and time** into their gardens over many years. It was clearly **their space, their work, their pride**
- A few described it as their own **"study" or own "room"**
- The above gardeners would concede that their garden is part of the **streetscape**. That is, they can extend the idea of the environment to the local environment, though the extension to the national or global environment is tenuous
- They do try and attract birds, but that is more a personal interest than an environmental project
- Many gardeners pointed out that the garden is an expression of their choices, their **personal touch**. If anything, it arose as more an **oasis** than part of the environment
- Note that environmental benefits were **not** cited as a common driver of or benefit from gardening.

The survey found that the segment being most global in their perspective on gardening was the New seekers (20%), with self-expressionists (68%) and non-confident loyalists (69%) being the most focused on their personal environment.

In summary, there appears to be **little mileage in leveraging environmental concern**. Rather, gardening is more about their own personal expression and personal space. Whilst most do accept that the global environment is important, the drivers of gardening and the perceived benefits were only rarely associated with the environment beyond their own property or neighbourhood. It can be positioned as an added benefit, and may help broaden the focus, but it does not immediately strike a chord with gardeners.

7.9 Industry Accreditation

The groups exhibited no awareness of industry accreditation schemes, other than for products (e.g., potting mixes). At this stage, discussion of accreditation was theoretic. The impression gained is that a **critical mass** of knowledge needs to be achieved before the industry can leverage it.

The survey revealed that **14%** gave a “yes” response in relation to industry accreditation. We specifically asked them about industry and not product accreditation, to avoid the confusion that arose in groups. Those more likely to give a positive response were:

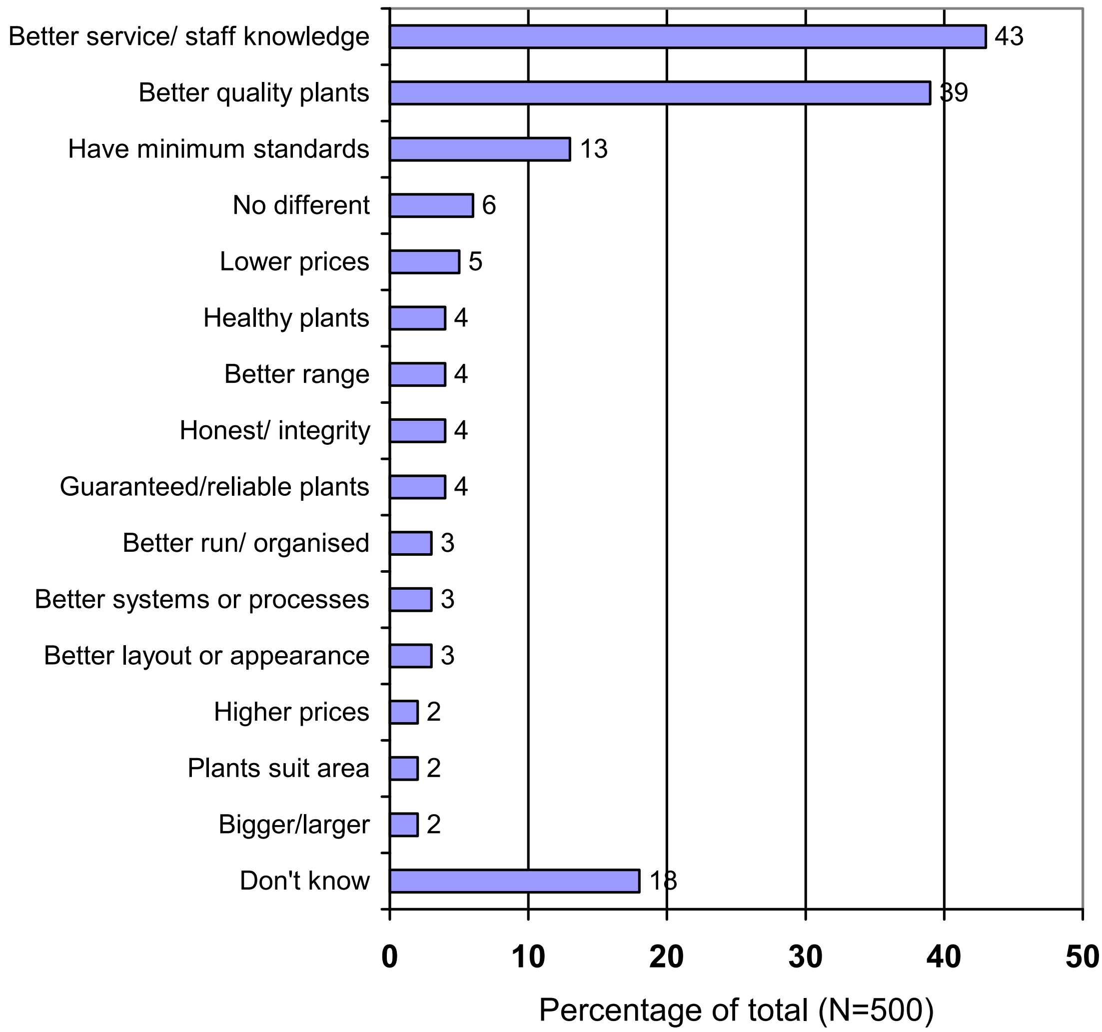
- Self-expressionists (22%)
- Green thumbs (19%)
- City residents (17%, vs. 11% of those in towns)
- Those most interested in gardening
- Those aged 50-59 years (22%).

Yet interestingly, of the 83 people who said that they had heard of the scheme, **none could give the correct name**. Only seven actually offered a name at all, and none could specifically mention either AGCAS or NIASA.

Overall, at most, some gardeners are aware that accreditation exists, though have no real knowledge of it.

Next, we explored **expectations for the accreditation scheme**, in terms of what would be “different” about an accredited nursery. The survey revealed the following:

Figure 12 - Expectations of an accredited nursery

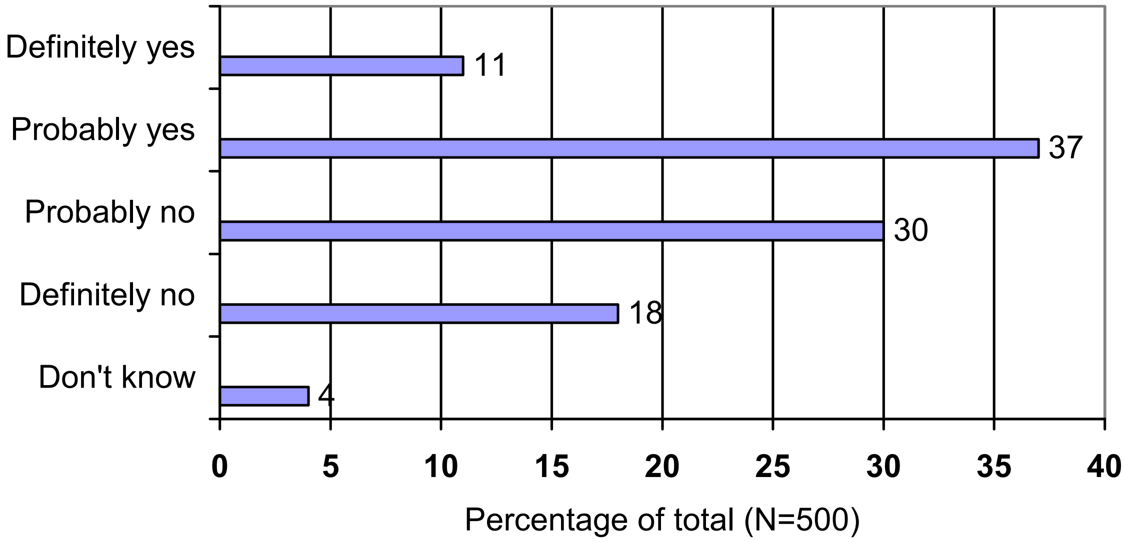


Overall, accreditation per se clearly has a number of **positive associations**, but at this stage, it is important to understand that they are **implied**. The industry accreditation schemes are simply not understood well enough for the above to be more than theoretic.

Accreditation does imply a degree of confidence. Even if the customer does not know much about it, it at least implies that the organisation has reached some level in terms of quality, systems, staff knowledge or operations.

Next, we asked if accreditation would matter to them if the nurseries and garden centres they buy from are accredited. We found the following:

Figure 13 - If accreditation would matter when selecting a new nursery



The distribution above suggests that **accreditation does add value**, though we also gained the impression that it is unlikely, at least in the short term, to affect many existing relationships.

We make the following comments based on the qualitative findings:

- When asked if companies that are accredited do any better than others, the view was that some form of accreditation was useful for **tradespersons** (plumber, electricians, etc) as this gave the consumer more confidence
- In the case of **nurseries**, most could not say if it would make any real difference. They complained that they knew nothing about the accreditation scheme, thus **how would they know?** It is for this reason that the above figure is somewhat theoretic, though all things being equal, accreditation does add some value, but they are making some assumptions in relation to what they would expect it to mean
- When asked if it would actually lead to changes in how nurseries operate, some expected that it would, though others felt that the scheme is more about **marketing** than structural change.

It is important to note that respondents were making the above up as they went along. Some were reluctant to give an opinion, saying, ***"how would we know?".***

Whilst accreditation does have the potential for leverage, we could not find much evidence to this effect. At the time of writing, it emerged as being in need of market knowledge to develop an image for the scheme and awareness of consumer benefits.

The above is evidenced by the finding that when asked if they would prefer to deal with accredited nurseries, they had **no real reason** to do so at this stage. If they were fully aware of it, they would still rely on nurseries they were happy with, though it may affect the likelihood of dealing with new nurseries (e.g., if they moved or if new nurseries were established).

7.10 What Makes Nurseries Successful?

This question is more an expression of **what they want and expect** from nurseries and garden centres, though it does suggest how consumers are thinking. It was evident that they are looking for **more than just a place to buy plants**.

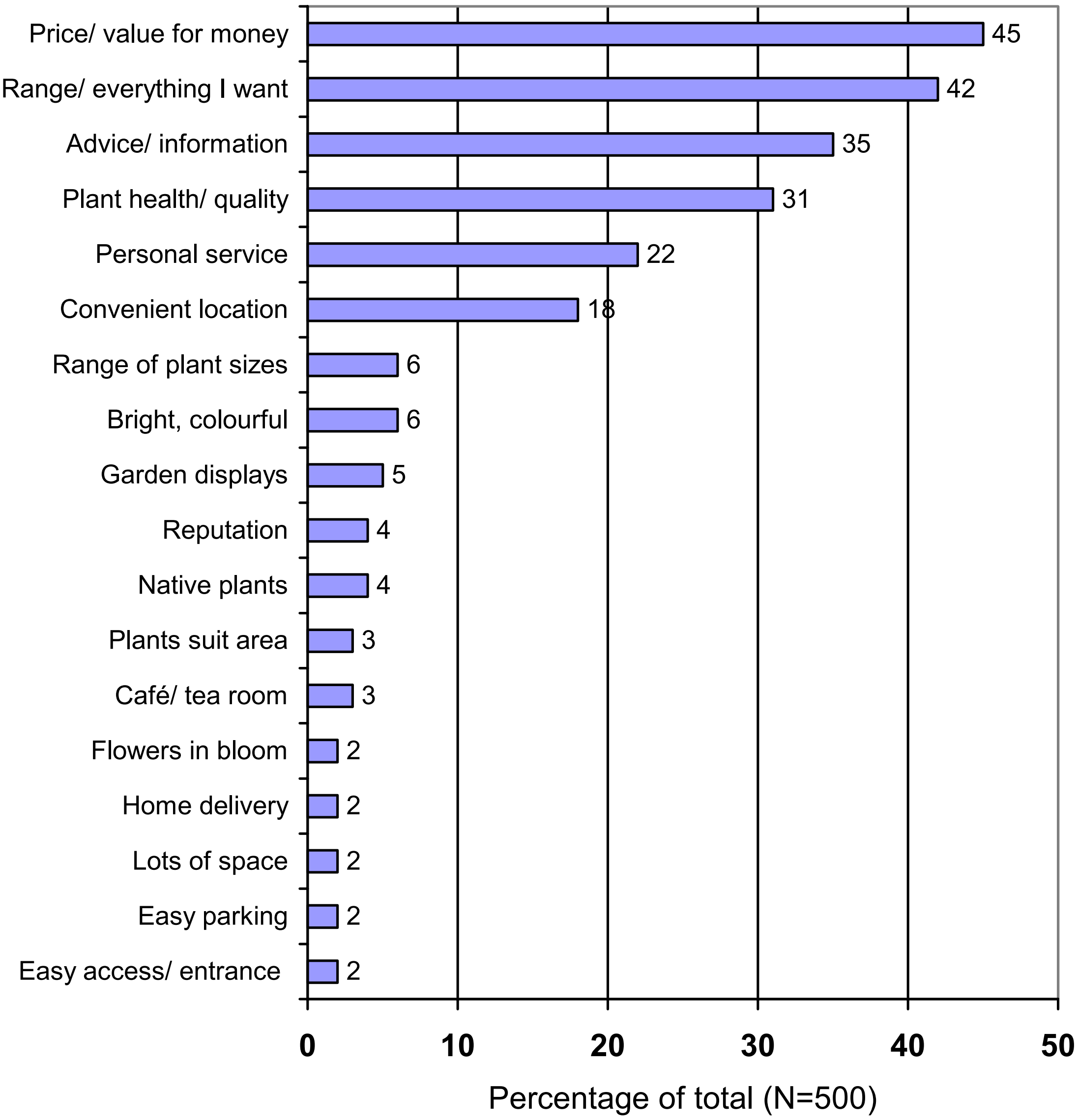
The qualitative phase indicated that important attributes were as follows:

- The **appearance** of the nursery was seen as very important. They want to get a **good feeling** when they visit, such as:
    - Landscaping design – looks like a garden, not just a shop
    - Well ordered
    - Interesting displays
    - Features such as water features
    - Lots of colour, beauty
    - Changes and variations in presentation, not just all the same.
- **Plant health and quality**, preferably to include guarantees
- Being **well-known** and having a high profile in the area (most felt that there are a few leaders in every region). They prefer to deal with nurseries that they have had experience with, and often indicated that they were reluctant to change (at least for plants, less so for supplies)
- Provision of **good advice**, with trained and enthusiastic staff (this was often raised as a critical success factor), for example, diagnosis of diseases, advice on where to plant, how to care for plants, etc
- Good **customer service** including long opening hours
- **Convenience** facilities, such as play equipment for kids, a coffee shop, toilets, etc

- Reasonable cost and **value,** including regular specials
- **Variety and range** – being able to get everything they want
- Having **clubs** for customers
- Good **plant labelling and information.**

The survey phase asked what features or services they would look for in a new nursery, for example, if they moved. The following arose:

Figure 14 - Features and services associated with an ideal nursery



The above indicated that there are **four major indicators**, viz:

- **Price** (most important to self-expressionists and lower white collar workers)
- **Range** (particularly important to Green thumbs, upper white collar workers and middle aged gardeners)
- **Advice and information** (particularly important to non-confident loyalists and upper white collar workers, and those rating themselves as having little gardening knowledge)
- **Plant health and quality** (important across the board, though less so to the time poor).

Overall, these four attributes were the most frequently mentioned across all segments, with only the order of importance varying.

The above can be considered an "ideal" nursery or garden centre. A key outcome from the group discussions was that customers want to **feel inspired**. **The look** of the garden centre is critical in this regard. The keener gardeners in particular wanted to make a **day of it**, not just buy a plant, and thus the convenience factors as well as range, quality, service etc, become important.

When it comes to actually purchasing garden supplies, it was evident that they were quick to **take advantage of local competition.** No wonder price arose as an important variable. Some admitted that they would visit the more up-market centres for ideas, yet buy supplies from K-Mart or Bunnings. In that regard, independent nurseries and garden centres need to provide more inspiration and interest to justify the visit.

We had little time to discuss the different images of independent retailers from chains and mass marketers. However, most indicated a preference of independents, based on plant quality and the experience of visiting them, yet that did not imply a bad image for the mass marketers and chains, though expectations for quality and service were lower.

It was also worth noting that when asked what improvements they could think of, most felt that **service aspects** (customer service, advice, information, staff knowledge) and improved **appearance** were the main suggestions.

Overall, there are many factors that affect purchasing, though across the segments, price, range, quality and service were the main factors.

7.11 Image of the Nursery Industry

Respondents really struggled to define the industry. When we asked them in groups to describe it, few had a consistent, clear image. The image dimensions associated with the industry were as follows:

- Low image, not well known
- Not distinct, not definable
- Backyard image/not an industry/more like farming
- Nice, friendly
- Clean & green
- Changing/more associated now with chains
- Plants (though some associated it with hardscape and supplies)
- Hands-on
- Calm
- Bit trendy/fashionable.

Many gardeners said that it has a **"nice" or "good"** image but the weakness was that to most, it was amorphous. The industry does **not have a distinct personality**. Most had some difficulty in defining its parameters – does it include plants only? Supplies? Landscaping? This makes it hard for the public to relate to, and means that the positive attributes lack strength.

In one group, a few argued that the industry needs to "smarten up" in that it is being taken over by the chain stores. To many, they saw the nursery and garden industry as **excluding the chain stores and mass merchandisers**.

When asked if the industry would benefit from the development of a **more unified image**, most had to think about it. The industry has to an extent had a **cottage industry** image, thus they think of it as a collection of smaller, independent businesses, and often they saw the chains as being separate.

Overall, there were **mixed views** of the need to develop a clearer image, though possibly many were basing their responses on a false assumption. Some answered that the image is already okay, thus it does not need fixing. Yet many had an inconsistent or indistinct image, which is the central issue, not if the existing image is "good" or "bad". Again, even if they had a "good" image of the industry, their image was not concrete or strong.

When asked what **image dimensions would work best**, the following were suggested:

- Advice, helpful, support, good service
- Professional
- Variety, good range, have everything
- Inviting
- Quality, reliability
- Knowledge, experience
- Local
- Practical, hands-on
- Social
- Value for money.

Although the above may be useful, few are distinct in their own right. Note again that there was a lot of emphasis on **service attributes**. The above are congruent with the attributes mentioned in the previous section of the report, and are useful for promoting the industry per se, though they are not specifically positioning routes for the promotion of gardening itself. Positioning routes are discussed in section 7.12.

7.12 Interest in Contractors and Designers

Contractors of any kind were used by just over one third (36%), with the following being used most often:

- Lawn mowing and edging services (15%)
- Pruning, weeding or plant maintenance (10%)
- Landscaping (8%)
- Paving, concreting, etc (7%)
- Garden design (3%)
- Tree lopping or surgery (3%)
- Gardening or plant advice (3%)
- Watering, irrigation (2%)
- Clean-ups, rubbish removal (2%).

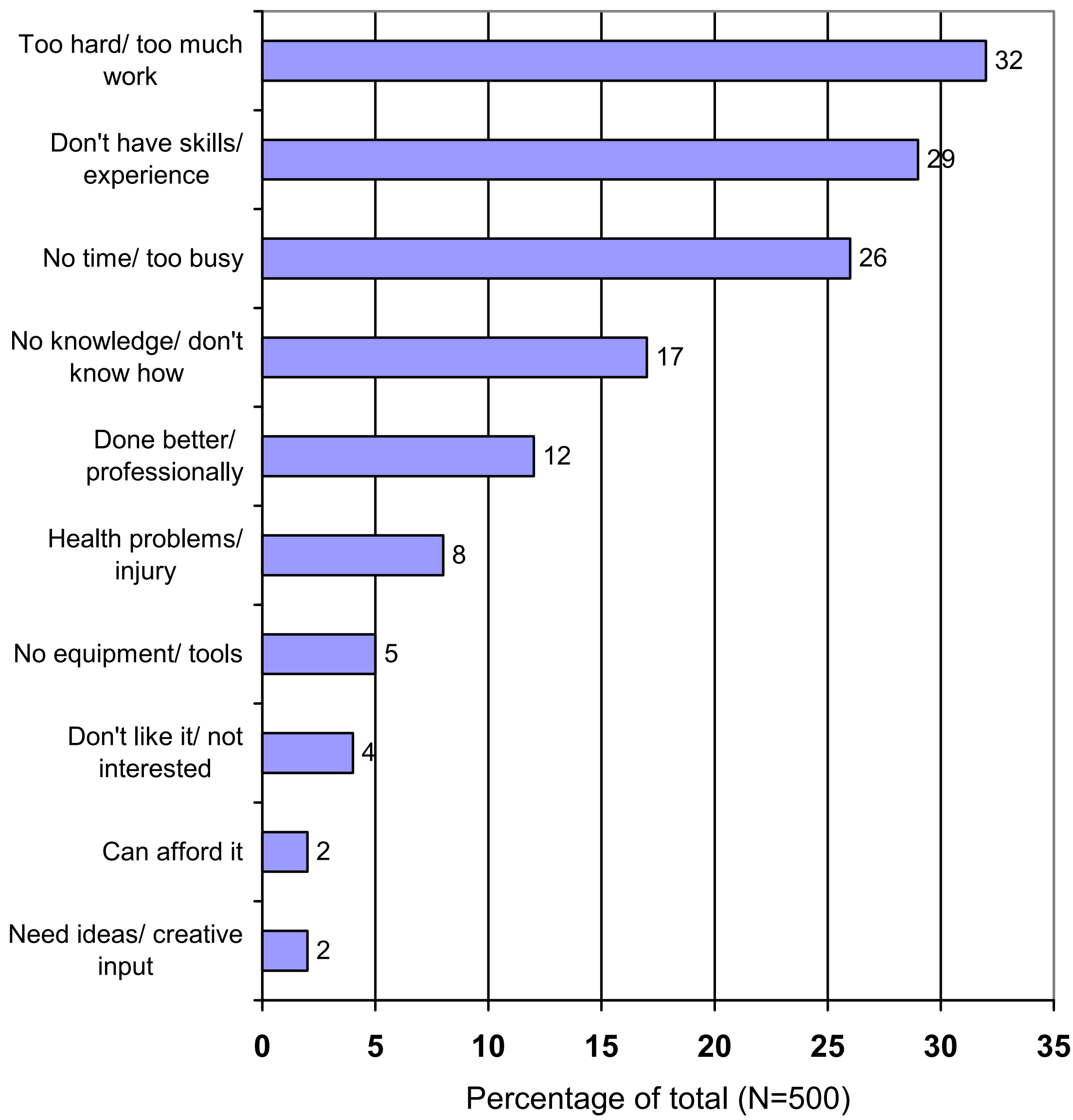
During groups, when the issue was raised, it was hardly greeted with a lot of enthusiasm. Particularly to keener gardeners, there were **numerous barriers** to using them, viz:

- For younger people in particular, **cost** was a barrier
- Across the board, few saw any point in paying someone else to do something that they can **do themselves**
- The older gardeners were more accepting of paying others to do "donkey work" like mowing and edging, though were still reluctant to use them if they are able to do it themselves. Not surprisingly, usage was higher among those aged 40 and over, compared to younger gardeners. Also note that blue collar workers were less often users of contractors (23%)
- A consistent barrier was **not wanting others to meddle** in their garden. They had **pride** in their ability to design and maintain their own garden, and resisted the idea of having someone else telling them what to do
- The above is confirmed by the finding that **Green thumbs** were the least likely segment to use any contractors (25%)
- The keener gardeners went to the extent of saying that they would feel **"ashamed"** or that they were "cheating" is someone else assisted in garden design

- The idea was seen as **reducing your enjoyment**, and to a point, losing control
- Some also raised concerns about the **quality and reliability** of contractors (though this appeared to be an excuse for not wanting them in the first place).

Reasons for using contractors were as follows:

Figure 15 - Reasons for using contractors for garden services



When asked if they would use contractors **more often in future**, we found some interest, though not much enthusiasm:

- Younger people were sometimes interested in using contractors for design work and also labouring tasks
- The older and keener gardeners were interested only in using contractors for "dirty work" and heavy labour, indicating that they still prefer to do it themselves.

The above suggests a **limited market for design work**, though at least some of the gardeners were interested in it. Part of this is a behaviour pattern, in that they never think of using others.

Despite the above, there does appear to be several factors that suggest the **future growth** of the market for contracting services:

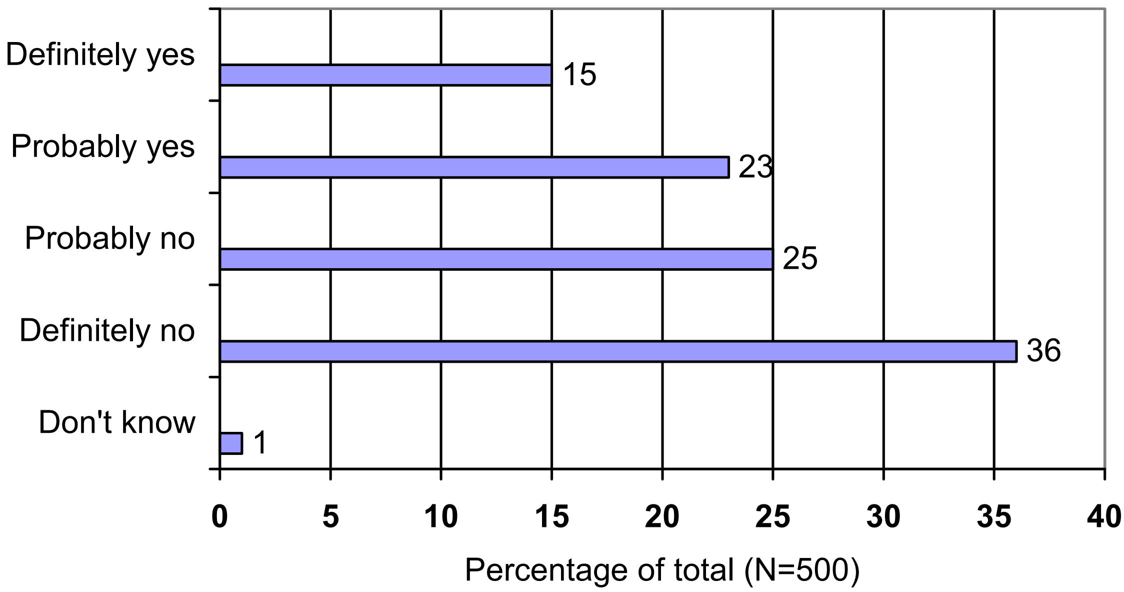
- Time pressure
- An ageing population
- Less knowledge of gardening among younger people
- Higher incomes (thus it becomes affordable).

During group discussions, we then asked if they were aware of any **nurseries or garden centres** that provide design and advisory services. We found the following:

- In all groups, some respondents could mention a nursery or garden centre that provided advisory services
- A few noted that charges for home visits were from $40 to $90, a few commenting that it is no more than a plumber's call cost
- Whilst some were prepared to pay for advice and assistance, many others said that they can **simply ask for advice at the nursery,** without paying at all
- Others suggested that they would expect the nursery to provide a home visit on the basis that they **buy some plants or supplies**. That is, the visit is free if you spend (say) $100 or more.

In the survey, we asked respondents if they were interested in **visits form a garden centre**, in relation to any aspect of gardening, garden design with no specific price being specified. Interest was as follows:

Figure 16 - Interest in visits from garden centres



Those most likely to give a "definitely yes" response were as follows:

- Non-confident loyalists and Bargain hunters (18% each), whilst Cut flowers (6%) and Green thumbs (9%) were less interested
- Those more interested in gardening (20%)
- Those aged 50 to 59 years (28%), and note that the older gardeners (60 years and over) were the least likely to be very interested (6%), and similarly, pensioners were less interested.

During group discussions, most considered the provision of advisory or contracting services by nurseries and garden centres to be a good idea, and there was a degree of **synergy** with nurseries and consulting services.

At this stage, there is some evidence of demand, though it is moderate at best. It is likely that adoption will take some time as attitudes and behaviour patterns would need to be changed, and most customers arose as being price sensitive.

7.13 Positioning Routes

This section summarises the findings from an analysis of a series of alternative positioning routes. These routes were expressed not as executions, but overall themes or ideas for marketing communications.

In the qualitative phase, we asked respondents to state which they most liked and most dislike, and we asked them to pick around 4-5 in each. Note that they found it easier to pick those they liked. Below, the left column summarises main likes, the right those they least liked. We have highlighted the most commonly ticked items.

Figure 17 - Positioning routes from the group discussions

Propositions/ Themes	Most like (Tick 2-3)	Least like (Tick)
1 Gardening is fun – an enjoyable experience	11	6
2 Gardening gets us in touch with nature	6	4
3 A garden is a great escape – like a personal sanctuary	**15**	4
4 Gardening is great family activity	3	**18**
5 Gardening helps us appreciate the total environment	6	**13**
6 Gardening gives personal revitalisation and relaxation	**16**	1
7 Gardening gives a feeling of nurturing	4	5
8 Growing plants gives a feeling of personal growth and well being	1	5
9 Gardening gives a real sense of achievement	**19**	0
10 Gardening is one of life's simple pleasures	11	7
11 Gardening enhances your health and fitness – it's great exercise	8	7
12 You create something of beauty from gardening	**20**	0
13 Gardening gives me a sense of pride	**16**	1

In the survey, we asked respondents to rate the themes on a three point scale, from like it a lot, to don't like it. The results are summarised below, with significant variations being highlighted:

Figure 18 - Positioning routes from the survey

Propositions/ Themes	Like a lot %	Some-what %	Don't like %
1 Gardening is fun – an enjoyable experience	58	30	12
2 My garden puts me in touch with nature	61	26	14
3 My garden is a great escape – like a personal sanctuary	59	22	18
4 Gardening is great family activity	39	26	**33**
5 Gardens and gardening helps us appreciate the total environment	**65**	28	8
6 Gardening gives me personal revitalisation and relaxation	58	27	14
7 Gardening gives me a feeling of nurturing	45	30	**25**
8 Growing plants gives me a feeling of personal growth and well being	53	33	14
9 Gardening gives me a real sense of achievement	**71**	23	6
10 Gardening is one of life's simple pleasures	**71**	22	7
11 Gardening enhances my health and fitness – it's great exercise	59	28	13
12 I can enjoy creating and having something of beauty from gardening	**67**	28	5
13 My garden gives me a sense of pride	**69**	25	6
14 My garden allows me to express my creativity	50	35	16

Please note that the routes were changed slightly for the survey, with the last route not being included in the qualitative phase.

What is interesting is that the qualitative and survey phases yielded a few different results, viz:

- **Environmental messages** were seen as important in the survey, which is not consistent with the qualitative phase nor respondent attitudes to how they perceive their garden as a personal, local or global environment. As a result, this route appears to be useful when prompted, but we question whether or not it is a socially acceptable issue
- In the survey, many (71%) agreed that gardening is one **of life's simple pleasures**, a route that was of only moderate value in the qualitative phase
- **Escapism** was less an issue in the survey, though still important in its own right.

Overall, the **main positioning routes liked** by respondents were:

- Creation of something beautiful from gardening (outcome based and sensory)
- Gardening gives a sense of achievement (outcome based)
- It gives a sense of pride (outcome)
- It is a simple pleasure (process based though also sensory).

We have not included the total environment concept as it seems to be inconsistent with drivers, benefits of gardening and also the environmental level they relate to. By "total environment" it would appear that this might be positioned differently by respondents.

The negative views about gardening being a family activity and its association with nurturing, are congruent with the comments made during the groups that gardening is about **their emotions, their space, their achievement, their creation.** In that context, it is a selfish and sometimes hedonistic activity. It does help bring you in touch with the environment, but more for their sake, not the environment's benefit.

In the group discussions, we asked people to "vote" for a **winner,** and to provide reasons for their choice and how they related to it. We summarise the outcomes below:

Figure 19 - Most Preferred Option (Qualitative Phase)

Propositions/ Themes	Most liked	Reasons and Comments
1 Gardening is fun – an enjoyable experience	3	• Get your hands dirty • Take it easy, at your own pace • Play outdoors and relax
2 Gardening gets us in touch with nature	4	• Get away from the house or office • Create and interact with nature • Touch and feel growing things • Get down to earth • Fun and entertaining
3 A garden is a great escape – like a personal sanctuary	4	• Own special place • Escape the hectic lifestyle • De-stress in the garden • One with the birds and earth • No pressure
4 Gardening is great family activity	2	• Get together • Sharing, learning, teaching
5 Gardening helps us appreciate the total environment	3	• Connects us to the environment • Responsible for the garden • Live with nature, appreciate it
6 Gardening gives personal revitalisation and relaxation	**6**	• Create special place • Different from normal activity • Outlet for frustrations • Refresh the brain – no thinking • Time out to let loose, do own thing • Respond to/create beauty
7 Gardening gives a feeling of nurturing	0	
8 Growing plants gives a feeling of personal growth and well being	0	
9 Gardening gives a real sense of achievement	**8**	• We are results driven • Self-driven, achieve for ourselves • Selfish/ want control we created it • Hands-on • You grow and design it • See the outcomes from effort

10 Gardening is one of life's simple pleasures	4	• Anyone can do it/for everyone • No demands, no limits • Simple rewards are best • Make life better
11 Gardening enhances your health and fitness – it's great exercise	2	• Great outdoor activity • Gives you exercise • Practical
12 You create something of beauty from gardening	**5**	• Art form you create • Build beauty from scratch • Enjoy the appearance • Achieve nice end result
13 Gardening gives me a sense of pride	2	• Produces something • Create own environment • Pride in achieving it

In short, the key outcome here is that there was a **greater tendency to be outcomes focused**. **Gardening achieves something**, and that is at a **personal** level. It gives them a sense of pride in a job well done, manifesting their personality and creative urges. At the same time, they can escape the pressure of life, get their hands dirty and de-stress.

The survey data allows us to segment the total market, as we have identified segment and demographic variables associated with the routes, viz:

Figure 20 – Segment variations for each route

Propositions/ Themes	Segments and Groups Most Liking Each
1 Gardening is fun – an enjoyable experience	• Green thumbs • More interested gardeners
2 My garden puts me in touch with nature	• Green thumbs, New seekers, Self-expressionists • Those developing an interest in garden after 30 years of age • Older gardeners and retired people • Apartment dwellers

3 My garden is a great escape – like a personal sanctuary	• Green thumbs, Self-expressionists, Non-confident loyalists and New seekers • Non-metropolitan residents • Females • Retired persons • Apartment dwellers
4 Gardening is great family activity	• Green thumbs, New seekers • Those starting gardening at a young age • Those aged 30-39 years • Females
5 Gardens and gardening helps us appreciate the total environment	• Self-expressionists, New seekers, Green thumbs • Those starting gardening when aged 30 years or over • Older respondents and pensioners
6 Gardening gives me personal revitalisation and relaxation	• Green thumbs, Self-expressionists, New seekers • Those starting gardening when aged 30 years or over • Those aged 40 years and over
7 Gardening gives me a feeling of nurturing	• Green thumbs, Self-expressionists, New seekers • Older respondents and pensioners
8 Growing plants gives me a feeling of personal growth and well being	• Green thumbs, New seekers • Those starting gardening when aged 30 years or over • Older respondents (60+) as well as those aged 30-39 years
9 Gardening gives me a real sense of achievement	• Green thumbs, New seekers, Self-expressionists, Non-confident loyalists • Females
10 Gardening is one of life's simple pleasures	• Green thumbs, Self-expressionists, New seekers • Non-metropolitan residents • Females • Older people

11 Gardening enhances my health and fitness – it's great exercise	• Green thumbs, Self-expressionists, New seekers • Females • Older people and pensioners
12 I can enjoy creating and having something of beauty from gardening	• New seekers, Green thumbs, Self-expressionists • Non-metropolitan residents • Older people and pensioners
13 My garden gives me a sense of pride	• Green thumbs, Self-expressionists, New seekers • Apartment dwellers
14 My garden allows me to express my creativity	• Green thumbs, Self-expressionists and New seekers • Blue collar workers and those not in the workforce

Overall, the segments that were most interested in gardening (Green thumbs, Self-expressionists, New seekers and to a lesser extent, non-confident loyalists), as well as older people, tended to more strongly agree with all of the above. Though a few variations arose, the variations outlined above suited keener gardeners most broadly.

Overall, we make the point that the **segmentation did not reveal that routes worked with quite different segments. Rather, they are broadly based.** The weakness is that none of the routes worked particularly well with either other clusters, or else younger gardeners.

In summary, we believe that the most effective route is **achievement,** though in embellishing that route, the positive emotions derived from achievement can also be linked to the **process** of gardening, and need to be sensory in terms of beauty, colour, etc.

7.14 Segmentation Questions

The "Show me the money" (SMTM) segmentation model was replicated except for nominal rather than ordinal questions being asked. These questions were used to form the clusters, and note that the proportions allocated to each cluster were stable with the last SMTM report. We present the results from the survey, below.

Figure 21 – Survey segmentation questions from SMTM

Statements	Agree	Dis.
I prefer to buy cut flowers rather than a plant	13	83
I buy plants in a number of retailers – I have no particular preferred place	71	28
I often find bargains when I shop for plants and garden products	56	42
I hardly ever shop at a nursery	29	69
I often buy plants that make me feel good	68	31
I buy plants from several retailers – I have no real loyalty to any	72	27
I often seek out new plants and gardening ideas	61	39
When shopping for plants and products for the garden, I often find a bargain	56	42
I was born with a green thumb	25	74
I see gardening as an expression of myself	60	38
I am proud of my garden	82	18
Shopping for plants is a social or entertaining activity for me	51	49
I try to keep up to date with new gardening ideas	52	48
I like to stop for a coffee or other drink at a gardening centre	29	69
I appreciate patient and helpful advice from staff	95	4
I am quite new to gardening and seek out new ideas or advice	37	62
I don't have time to browse when I buy plants	24	75
I can't be bothered shopping around for the best price for a plant	51	49
I enjoy gardening but I don't buy many plants	56	42

A few gave "don't know" responses to each of the above. Whilst the change of scale accounts for some variations between this survey and the SNTM survey, it is interesting to note that the following questions achieved quite different answers:

- Overall, the answers to this survey were more favourable in relation to gardening. This is probably at least partly explained by the respondents having talked about gardening for 20 minutes or so, as well as slight variations in respondent selection criteria, but on several statements, responses were more positive about gardening, gardens and nurseries

- In this survey, 95% said they appreciated friendly and helpful advice from nurseries, which is considerably greater than in the 2002 SMTM report, possibly suggesting more demand for service
- There was stronger agreement that gardening is an expression of myself, and that shopping for plants is social entertainment
- Less said that they could not be bothered shopping around for the best price, which indicates more price sensitivity, and secondly, fewer said that they don't have time to browse
- More agreed that buying plants makes them fell good.

Overall, attitudes were more positive than expected, and these gardeners appeared to be more patient and involved. This may imply more shopping around, but there was more enthusiasm for gardening, garden centres and shopping per se than expected.

8. Nursery Industry Media Interviews

8.1 Background

A total of nine nursery industry media interviews were conducted during February, 2003. The people interviewed undertook work on television or radio, or were print journalists. Their places of employment were radio 2GB, Gardening Australia, 4BC, The Age, Marie Claire, Sydney Morning Herald, Better Homes and Gardens, The Herald and Weekly Times, The Sun-Herald, 2UE, as well as a few freelance writers for various magazines.

The forms of media they worked for had been in business for at least seven years, and some more than twenty years.

8.2 Demographic Information

Generally their viewers or readers were considered to be mainly over 40 years. Some reported younger listeners were in the pre-teen group, whilst they all said there was little appeal to the 20 to 25 age group.

All respondents noted that their audiences seemed to be **getting younger** each year. One noted that more baby boomers were listening to the program, and becoming more interested in gardening each year. This is a very positive trend for the industry if it continues.

8.3 Consumer Motives

All respondents agreed those who loved gardening say it as a priority, and it was noted by one person this was more so in Melbourne (which was only partly verified in the survey).

Some commented that if gardening were seen as a leisure pursuit or a kind of therapy for people, then they would give it higher priority. Gardening however does have to compete with other activities such as children's sporting and activities, other social activities, and anything else that takes time and money.

A factor which was noted by many of these respondents as making gardening a high priority was **how successful people are** with growing plants and creating the effect they want. Such an effect could be having a neat and tidy home, or assisting in returning to a more grass roots lifestyle such as growing their own vegetables, which was considered a strong motive for gardening, or they feel good or a sense of nurturing from growing plants.

In terms of spending money, it was pointed out that people would spend if they **personally gain pleasure** from gardening, it supports their **lifestyle** or it increases the value of their **property**. In terms of spending, it competes with entertainment, holidays and the general household items and the payoff from other items that are considered luxuries as compared to gardening.

In general, most considered that the motivation to garden lay in the **feel good** potential, having a **nice home and garden**, the ability to create a **haven** from the rest of the world, the need to **nurture** and grow things and that it can be very **therapeutic**. The motivation to garden was often seen as **emotionally based**.

8.4 Gardening as an experience or an outcome?

There were diverging opinions in relation to this question. Generally it was considered that those who are hooked on gardening saw it as an **experience** rather than being outcomes based, although this was also important.

Some saw it as being equally undertaken for the experience and the outcome, whilst others felt more people were becoming **purely outcomes focused** in their desire to garden. That is, it was not necessarily a special experience for them, merely a project, though they still want a nice garden.

The above is largely consistent with the consumer research, and suggests that outcomes-based messages have broader appeal.

8.5 Changing views on gardening

The majority of people stated that television and the 'makeover' shows such as Backyard Blitz and Groundforce were changing people's views on gardening. These are making gardening seem a **quick and easy activity** to undertake and providing people with instant gratification. It is showing gardening as part of the overall lifestyle concept.

Other factors affecting views on gardening are the **drought** and the **failures** people are having with their plants. Poor nurseries with poor plants and advice are changing peoples' views on gardening also. Once they fail, people lose confidence to undertake more gardening, and this also contradicts the "quick and easy" issue.

However on more positive notes, some respondents stated that people are becoming aware through magazines and television that gardening is not only a **trendy** activity, but also a **healthy** activity to undertake.

8.6 Learning experiences

Seven of the nine respondents believed that learning to garden at an **early age** encouraged people to continue gardening later in life. They felt it demystified the experience and gave people confidence to work in their garden as well as an interest. One person was not sure whether learning at an early age made a difference, however felt that it would be good to learn to garden young as people become more hands-on this way.

The one person who did not believe that gardening at an early age encouraged people to continue, stated he felt most people really learn when they have their **first home** and this is the prime reason for them to begin gardening. Note that the consumer research suggested that both views are realistic.

All respondents noted that **television** in particular was the main source of information about gardening. Again the makeover shows provided much information. They did note that radio, newspapers and magazines were also important. Radio was seen as useful because people could call in and have their problems solved.

One person noted that visiting nurseries and talking to other people about their gardens were often a source of information about gardening. It was also noted by some that in the past it was grandparents who were often the source of knowledge, but this is less likely to be the case now.

Overall it was considered the **gardening media have a large impact on gardeners**. Some of the media create gardening as a **fantasy** for people, somewhere they can hide from the world, or a place they can create for themselves. The evidence for the impact of the media comes from the alleged increase in mature plants. These are the ones used on Groundforce and Backyard Blitz. It was generally considered that the media does inspire people to buy specific plants for their gardens.

8.7 Gardening as fashion

Of the nine respondents all agreed that gardening was considered a **fashion issue** to different degrees from very much so, to not all that much. One person compared it to architecture, whilst another stated that having a nice garden and being able to spend large amounts on plants was considered a statement about a person's wealth and status.

The **current trends** were seen as:

- Succulents
- Drought resistant gardens
- Low maintenance
- Minimalism or small scale gardens which could be changed often
- Tropical foliage
- Bold colours
- Water features
- Australian natives
- Balinese gardens.

In the **future**, these respondents felt the following would be different about gardens:

- Drought resistant
- Smaller gardens
- Less chemicals used
- Less lawns and possibly less trees (due to litigation)
- More creative water plants
- Minimalist and less water use.

8.8 Popularity of gardening

All people agreed that gardening would become **more popular**. This was put down to:

- People wanting to grow their own organic vegetables
- An aging population
- Having smaller gardens
- The likelihood of war – people focus more on their home and home life.

One person did state that the popularity would be reduced if the nurseries continued to sell poor plants. This would reduce people's interest in gardening.

8.9 The drought

All respondents believed the drought has impacted on people and gardening. However most believe that once it rains again people will **forget the drought** and go back to having their gardens the way they were previously, including returning to buying plants at the nurseries.

Some believed that some gardeners who would employ some better practices, and may change the types of plants they put in their gardens and have less lawn than before, otherwise there will be **little change**.

8.10 Image of gardening in Australia

All respondents believed gardening had a **good and positive** image in Australia. Words like hip, nurturing, high profile, trendy and vibrant were used to describe gardening in Australia. The negative comments were about the nurseries and the plants they supply (e.g., “crappy”) more than about image of gardening itself.

The **strengths** in terms of consumer appeal were that gardening is a **positive activity** that leaves people feeling positive. It is an activity that has people admiring beautiful gardens and allows people to bring out their nurturing side. Those who love gardens find they cannot stop spending money on them and continually want to improve what they have.

The **weaknesses** related to the nursery industry. It was commented that many nurseries do not provide good plants, nor do they provide expert advice to customers. These nurseries are seen as not being able to pick the trends in plants and therefore do not have the varieties currently in vogue.

The **lack of marketing** and advertising by nurseries was seen as a weakness in the industry and consumer appeal.

It was also noted that consumers are not aware of the **costs** associated with growing and nurturing plants. As such they would often feel they are being “ripped-off” when buying plants, which appeared expensive to them.

Generally it was commented the nurseries needed to have **better products**, and have their people **better educated** to assist the consumers. They need to **market** themselves and their products better, including how they lay out their nurseries and garden centres, and ensuring they have quality products available.

It would also be worthwhile for the nurseries and the NGIA to have **closer ties with the media**. This would mean when the media are recommending certain plants, the nurseries can be aware and have them available, and also to let the media know of new plants so they can discuss them on their programs or in their articles.

8.11 Positioning routes

The respondents considered that positioning routes need to be based around:

- Fashion
- Positive emotions
- The environment
- Personal health and therapy
- Family orientation
- Living in the great outdoors.

Note that the above only partly match consumer views.

One person suggested that the nursery industry needs to remind people they were the first 'greenies' and this would associate it with the environment. Generally emotionally based, lifestyle based positioning routes were considered to be important.

There were however differing views on whether only one route could be used for communication. Those who said no suggested that the gardening industry was too broad, and as such a single position could not be taken for communication. One person did suggest that one overall organisation should represent the industry, and this would bring it closer together.

Of the nine respondents, seven believed that a more **unified approach** to images and messages would work for the industry. It would appear that all facets of the industry were working together. One respondent believed there would be greater benefit if Horticulture Australia assisted the nurseries with their individual campaigns, rather than nurseries doing things differently.

8.12 Good and bad nurseries and the accreditation scheme

Generally it was considered consumers know good from bad nurseries by the quality of their plants and the advice they are given. It was thought they judge them by the displays they have, how creative they are and how healthy the plants appear. Also service and uniforms are considered important.

Some respondents suggested that consumers learn by word of mouth based on other peoples' experiences with particular nurseries. Only one respondent stated they did not believe that consumers could tell a good from a bad nursery.

Eight of the nine respondents stated they were familiar with the nursery accreditation scheme. It was considered the scheme was in place to raise the standards of the nurseries in particular the processes and procedures, and to improve their standards of professionalism. One respondent did not think the accreditation process was rigorous enough.

Eight respondents believed the accreditation scheme did **not** affect consumer behaviour at this point in time. It was considered the consumers rely on what they see when they walk into a nursery and are generally not interested in what happens behind the scenes.

One person suggested that it might improve **consumer confidence** and change their behaviour if the scheme was marketed well. Again it was not considered that it would impact on consumer purchasing in the future unless it changes the advice consumers are given, or the displays they see when entering a nursery.

The accreditation scheme was seen as improving quality and processes and that it was effective in doing this. As we noted with the consumer research, community awareness appears to be a barrier.

8.13 Designers and contractors

All the respondents except one believed the market for designers and contractors would **continue to grow**. This was because people have less time due to work (often there are two people in the house who work) and also that people wanted to have expert advice and someone to do the work for them. One person also expressed this growth would continue because of the bad nurseries.

One of the concerns raised was there is no accreditation for designers and contractors and this can bring the market into disrepute.

The main **barrier** to people using these services was money. Others were the weather and shrinking sizes of backyards. It was considered that people have unrealistic expectations of the cost of hiring a designer of contractor. They do not expect to have to pay a lot for these services.

8.14 Alliances with other organisations

Regarding alliances with other organisations, these respondents were quite split. Of those who considered it a good idea, they suggested organisations such as CSIRO, an organisation like a Royal Horticultural Society (they were aware this does not exist), Weed Busters, water conservation, EPA, healthy life organisations, Heart Foundation and organisations to do with older people (e.g., Council on the Ageing).

Those who did not consider it worthwhile believed it was only a fringe activity, and associating with health organisations was not useful as you do not get “healthy” from gardening (this may imply some ignorance about the fitness benefits of gardening).

8.15 Relationship with the media

There was definite agreement on this question, except for one respondent who believed the nursery industry already had a good relationship with the gardening media. All others strongly stated that there needs to be **better relationships** between the nursery industry and the media.

More specifically, they would like to get more information about what is happening in the nurseries, new plants, changes in the industry or processes, or new ideas coming up. They believed the nursery industry and its associations need to be less bureaucratic and be more **pro-active in providing information** to the gardening media.

Their comments centred on working together with the nursery industry and the media. Again providing more information to the media and building strong and personal relationships with Horticulture Australia, NGIA and the media.

They also suggest that there is a need for greater use of advertising and increasing the advertising spend. This will bring greater attention to gardening because the magazines will provide extra space to those products which are heavily advertised. It was believed this would be beneficial for both parties.

The majority commented on television programs that do an immediate makeover as being **unrealistic**. As a result, they may actually have a negative impact on people who are not able to complete the projects in the same time, nor at the same cost (as labour is not costed on these programs).

Consumer Gardening Survey

Final Questionnaire

On Contact With the Household...

Good (.....) I'm (..name..) from Dignam & Associates Market Research. We are doing a national survey on gardening and outdoor activities.

S.1 Firstly, can you tell me what type of dwelling you are in? Would that be...
Read Out

Free standing house	1	(go to S.3)
Semi-detached house	2	(go to S.3)
Villa or town house ***with*** own garden area	3	(go to S.3)
Villa or town house ***without*** own garden area	4	(continue)
Flat or home unit	5	(continue)
Boarding house, hostel etc	6	(terminate)
Other type	7	(continue)

S.2 Do you have any garden area in your dwelling such as a patio garden?

Yes	1	(continue)
No	2	(terminate)
Don't know	3	(terminate)

S.3 I need to speak to the person in the household who is most responsible for the garden.

Notes: If two are equally responsible, either can be interviewed
Terminate if nobody is responsible at all
You can still interview them if they don't do the gardening personally

IF BUSY OR UNAVAILABLE, MAKE TIME/DATE FOR CALLBACK

S.4 **On Contact with Selected Respondent:**
Do you do any gardening at all, including garden or lawn maintenance?

Yes/do	1	(go to Q.1)
No/do not garden	2	(continue)

S.5 Are you interested in your garden, even if you don't do the gardening?

Yes	1	(continue)
No/ not interested	2	(thank respondent and terminate)

Q.1 For how many years have you been living in ***this*** dwelling?
(Round to nearest whole year unless below 1 year)

Write in years	|___|___|___|
Less than 1 year	98
Can't recall	99

Q.2 Is the dwelling… *read out*

Owned outright	1
Being paid off (mortgaged)	2
Rented or leased	3
Other	4

Q.3 At what age did you first start to do some gardening? *Aid if necessary*

Before ten years	1	25-29 years	5
10 to 14 years	2	30 or over	6
15 to 19 years	3	Never (go to Q.7)	7
20 to 24 years	4	Don't know (go to Q.5)	8

Q.4 At the beginning, who or what influenced or taught you about gardening?
Accept Multiples *Probe for Others*

Mother	1	Own interest/ curiosity	7
Father	2	Neighbours	8
Parents/ both	3	Books/ magazines	9
Friends	4	TV or radio	10
Other relatives	5	Other (specify)	11
School/ school project	6	Can't recall	12

Q.5 Did you enjoy gardening in the beginning?

Yes	1	(go to Q.7)
No	2	(continue)
Don't know/ can't remember	3	(go to Q.7)

Q.6 At what age, if at all, did gardening start to become enjoyable to you?
Probe if necessary

Before ten years	1	25-29 years	5
10 to 14 years	2	30 or over	6
15 to 19 years	3	Never	7
20 to 24 years	4	Don't know	8

Q.7 Did the property you are presently living in have an established garden when you moved in? *Aid if Necessary*

Yes/established	1	No/not at all	3
Partially/to some extent	2	(Don't know)	4

Q.8 Over the years, what have been your main sources of information or ideas about gardens, gardening and outdoor areas? *Do Not Aid* *Probe for Others*

Books/gardening books	1
Gardening/home magazines	2
Gardening/home television	3
Other media sources	4
Nurseries	5
Garden supply centres	6
Landscape gardeners/designers	7
Friends or relatives	8
Visits to gardens/parks etc	9
Neighbours	10
Other (specify)________________________	11
Don't know	12
Inspiration/own head	13
Nowhere	14

Q.9 At the **present** time, how **knowledgeable** about gardens and gardening do you regard yourself as being? Would that be… *Read out*

Very knowledgeable	1	Not at all knowledgeable	4
Quite knowledgeable	2	(Don't know)	5
Not very knowledgeable	3		

Q.10 At the present time, how **interested** are you in your garden?
Would that be... *Read Out*

Very interested	1	Not at all interested	4
Quite interested	2	(Don't know)	5
Not very interested	3		

Q.11 Where do you get **inspiration** from? I mean, not just information, but new or big ideas about your garden? *Do Not Aid* *Probe for Others*

Books/gardening books	1
Gardening/home magazines	2
Gardening/home television	3
Other media sources	4
Nurseries	5
Garden supply centres	6
Landscape gardeners/designers	7
Friends or relatives	8
Visits to gardens/parks etc	9
Neighbours/ the neighbourhood	10
Other (specify)________________________	11
Don't know	12
Own head/ imagination	13
Nowhere	14

Q.13 Do you generally prefer indoor or outdoor pastimes and activities?

Indoor	1
Outdoor	2
Both equally/ no preference	3
(Don't know)	4

Q.14 Which of the following statements **best** suits you in terms of allocating time for gardening? *Read Out Single Response Only*

I regularly put aside time for gardening, and treat it as a priority	1
I try to regularly put time aside for gardening, though other activities sometimes need to take priority	2
I try to do gardening whenever it is needed, though it has to fit in with the time needed for other activities	3
I don't treat gardening as a high priority; I will put it off if I want to spend time on other activities	4
Gardening is a low priority to me; I only do it when I have to, and prefer to spend time on other activities	5
I rarely or never garden	6
(Don't know)	7

Q.15 Which of the following statements best suits the priority you give to gardening in terms of **spending money**? *Read out One Response Only*

I spend as much money as I want to on the garden. I don't think of it	1
I generally buy what I want and need for the garden. I may put off some purchases or look for cheaper alternatives sometimes	2
Gardening costs have to fit in with my budget; I spend what I need when I can, though other purchases may come first	3
I buy things for the garden if I have some money left over	4
I only spend money on the garden when I absolutely have to	5
I never spend money on the garden	6
(Don't know)	7

Q.16 Does the money you spend on the garden give you good value?
Would that be… *read out*

Definitely yes	1	Definitely no	4
Probably yes	2	(Don't know)	5
Probably no	3		

Q.17 What are your **main motives** for gardening. I mean, what gets you out into the garden? *Accept Multiples* *Probe if Necessary*

Plants/ garden out of control/ keep it neat/tidy	1
Being outside/ in the sunshine/ get outdoors/out of the house	2
Keep the garden/ outside looking good	3
Attract birds/wildlife	4
Colour/ smells of plants	5
Looks good/ nice appearance/beautiful	6
Healthy activity/ physical exercise/ movement/ good for you	7
Necessity/ have to do it	8
Seeing nice gardens/ other properties/ neighbours, etc	9
Therapeutic/ satisfying/ relaxing/ peaceful/ feels good/enjoyable	10
Pride/ show it to others/says something about us	11
Challenge/ learning new things/trying new tasks	12
Achievement/ see the results of your work/ produce something	13
Nurturing/ seeing things grow/ watching plants mature	14
Create own space/ environment/ personal expression	15
Family activity/ time with family	16
In touch with nature/ part of nature	17
Adds value to house/property	18
Provides shade/ outdoor living area	19
Other (specify)	20
(Nothing/don't garden)	21
(Don't know)	22

Q.18 What are the **benefits** that you personally get from your garden?
Probe: "what do you really get out of it?" *Accept Multiples* *Probe if Necessary*

Neat/tidy/organised garden	1
Fresh air/ suntan/ gets me out of the house	2
Keeps the garden/ outside looking good	3
Attract birds/wildlife	4
Colour/ smells of plants	5
Beautiful/ attractive garden	6
Health/exercise/workout	7
Enjoyment/ relaxation/ satisfaction/ feeling good	8
Pride/ show something off to others/ seen by others	9
Learning new things/ being challenged	10
Achievement/ see the results of your work/ produce something	11
Fresh vegetables/ fruits/ flowers	12
Nurturing/ seeing things grow/ watching plants mature	13
Create own space/environment/ personal/self expression	14
Spend time with family/ get together	15
Brings me in touch with nature/ plants/animals	16
Adds value to house/property	17
Provides shade/ outdoor living area/entertainment area	18
Contributes to physical environment	19
Other (specify)	20
(Nothing)	21
(Don't know)	22

Q.19 Overall, what is more important to you in relation to your garden? *Read Out*

The experience of gardening itself	1	(Don't know)	4
The sense of achievement you get from it	2	(Neither)	5
Both equally	3		

Q.20 Do you think of your garden as… *read out*

Your own personal environment	1
Part of the environment of your suburb or region	2
Part of the global environment	3
(All of them)	4
(Don't know)	5

Q.21 Have you recently changed any gardening practices due to drought or water restrictions?

Yes	1	(continue)	No	2	(go to Q.23)
			(Don't know)	3	(go to Q.23)

Q.22 What practices would that be?

Less water usage/water conservation	1
Composting/ use of compost	2
Mulching the garden	3
Put in watering system	4
Planted different plants/shrubs	5
Removed some plants/shrubs/ trees	6
Bought water tank	7
Recycle/re-use water	8
Do less/ no gardening	9
Don't buy plants/ have less plants	10
Other (specify)	11
(Don't know)	12

Q.23 Imagine you moved and needed to choose a local nursery or garden centre to buy plants and supplies. What features, services or characteristics would be important to you in picking one to buy from? Please tell me as many aspects of that nursery that you can think of. *Do Not Aid* *Probe for Other Aspects*

Bright, colourful site	1	Good price/ value for money	14
Flowers in bloom	2	Advice/ information	15
Clear signage, directions	3	Labelling of products	16
Easy parking	4	Range/ everything I want	17
Comfort features/ toilets	5	Quality/ healthy plants	18
Easy entrance/ access	6	Range of sizes of plants	19
Play areas for kids	7	Gift wrapping service	20
Entertainment/ videos	8	Garden displays	21
Café/ tea room etc	9	Specific garden themes (eg, Mediterranean, cottage garden)	22
Personal service	10		
Gift shop	11	Accredited	23
Water/ fountains/ ponds	12	Other (specify)	24
Lots of space/ spacious	13	Don't know	25

Q.24 Have you heard of an industry accreditation scheme for nurseries and garden centre businesses?

Yes	1	(continue)	No	2	(go to Q.26)
			Don't know	3	(go to Q.26)

Q.25 Do you know what it is called?

NIASA	1
Nursery Industry Accreditation Scheme Australia	2
Garden Centre Accreditation Scheme	3
AGCAS	4
Other (specify)	5
(Don't know)	6

Q.26 What would you expect, if anything, to be different or better in an accredited nursery compared to non-accredited businesses?
Do Not Read Out Probe for Others

Nothing/ no different	1
Quality/ better plants	2
Systems/ processes better	3
Better run/ organised	4
Have standards/ minimum levels	5
Bigger/ larger	6
Appearance/ look better/layout etc	7
Better staff/ service/ knowledge	8
Other (specify)	9
Don't know	10

Q.27 Would it matter to you if the nurseries and garden centres you buy from were accredited by the industry? Would that be… *Read out*

Definitely yes	1	Definitely no	4
Probably yes	2	Don't know	5
Probably no	3		

Q.28 Have you ever used any gardening contractors for any aspects of gardening, garden design or maintenance?

Yes	1	(continue)
No	2	(go to Q.31)
Don't know	3	(go to Q.31)

Q.29 What types of work was it for? *Probe for Others* *Accept Multiples*
Read Out if Necessary

Lawn mowing/ edging etc	1
Plant maintenance/ pruning etc	2
Advice on gardening, plants etc	3
Garden design	4
Landscaping	5
Paving/ concreting/ building etc	6
Other (specify)	7
Don't know	8

Q.30 What are your reasons for using those gardening services?
Probe for others *Accept Multiples*

No time/ too busy	1
Don't like it/ not interested	2
Too hard/ too much work	3
Health problems/ injured etc	4
Need ideas/ creative input	5
Don't have the skills/ experience	6
No knowledge/ don't know how	7
Can afford it/ pay someone else	8
Other (specify)	9

Q.31 Would you be interested in having staff from a local nursery or garden centre visit you personally to help with any aspect of gardening, garden layout or design? Would that be… *read out*

(**Note**: If necessary, say that we are not selling anything – just looking at their interest in such services)

Definitely yes	1
Probably yes	2
Probably no	3
Definitely no	4
Don't know	5

Q.32 I would like you to rate the importance to you of a series of alternative promotional ideas, which seek to present the benefits of gardens and gardening. As I read them out, please indicate which you like and don't like, using the scale:

- Like it a lot
- Somewhat like it
- Don't like it

Propositions/ Themes	Like a lot	Some -what	Don 't Like	DK
1 Gardening is fun – an enjoyable experience	1	2	3	4
2 My garden puts me in touch with nature	1	2	3	4
3 My garden is a great escape – like a personal sanctuary	1	2	3	4
4 Gardening is a great family activity	1	2	3	4
5 Gardens and gardening helps us appreciate the total environment	1	2	3	4
6 Gardening gives me personal revitalisation and relaxation	1	2	3	4
7 Gardening gives me a feeling of nurturing	1	2	3	4
8 Growing plants gives me a feeling of personal growth and well being	1	2	3	4
9 Gardening gives me a real sense of achievement	1	2	3	4
10 Gardening is one of life's simple pleasures	1	2	3	4
11 Gardening enhances my health and fitness – it's good exercise	1	2	3	4
12 I can enjoy creating and having something of beauty	1	2	3	4
13 My garden gives me a sense of pride	1	2	3	4
14 My garden allows me to express my creativity	1	2	3	4

Q.33 I am going to read out a series of statements about gardening. As I read them out, please indicate if you agree or disagree.
Read out each – Try and avoid "don't know" responses.

Statements	Agree	Dis.	DK
I prefer to buy cut flowers rather than a plant	1	2	3
I buy plants in a number of retailers – I have no particular preferred place	1	2	3
I often find bargains when I shop for plants and garden products	1	2	3
I hardly ever shop at a nursery	1	2	3
I often buy plants that make me feel good	1	2	3
I buy plants from several retailers – I have no real loyalty to any	1	2	3
I often seek out new plants and gardening ideas	1	2	3
When shopping for plants and products for the garden, I often find a bargain	1	2	3

I was born with a green thumb	1	2	3
I see gardening as an expression of myself	1	2	3
I enjoy shopping for plants and garden supplies	1	2	3
I am proud of my garden	1	2	3
Shopping for plants is a social or entertaining activity for me	1	2	3
I try to keep up to date with new gardening ideas	1	2	3
I like to stop for a coffee or other drink at a gardening centre	1	2	3
I appreciate patient and helpful advice from staff	1	2	3
I am quite new to gardening and seek out new ideas or advice	1	2	3
I don't have time to browse when I buy plants	1	2	3

D.1 How many hours a week, on average, would you spend on all gardening activities, including outdoor maintenance? *Ask for Best Estimate if Unsure*

No. of Hours |___|___|___|

D.2 Sex (record automatically)

Male	1	Female	2

D.3 Which of the following age groups do you fall into? *(Read Out)*

Under 20 years	1	40 to 49	6
20 to 24 years	2	50 to 59	7
25 to 29	3	60 to 69	8
30 to 34	4	70 years or over	9
35 to 39	5	(Refused)	10

D.4 What of the following best describes your occupation?
Read Out Aid if Necessary

Managerial	1	(continue)
Professional	2	(continue)
Technical or para-professional	3	(continue)
Other white collar	4	(continue)
(eg, sales, administrative, clerical, secretarial)	5	(continue)
Skilled trades and crafts	6	(continue)
Service worker	7	(continue)
Other blue collar	8	(continue)
Full time home duties	9	(go to Q.34)
Student/studying	10	(go to Q.34)
Retired/pensioner	11	(go to Q.34)
Looking for work	12	(go to Q.34)
Other (specify)	13	(continue)

D.5 Do you work full time or part time?

Full time	1	Part time	2

D.6 Which of the following best describes your household? *Read Out*

Younger single people sharing the house	1
Single couple/no children	2
Family with pre-school children	3
Family with school age children	4
Mature family - children with children older than school age	5
Couple of single older person/s	6

Name: ____

Tel. No. |__|__|__| |__|__|__|__|__|__|__|__|

City *Record Automatically*

Sydney	1	Other QLD	6
Other NSW	2	Adelaide	7
Melbourne	3	Other SA	8
Other VIC	4	Perth	9
Canberra/ACT	5	Other WA	10
Brisbane	6	Tasmania	11

Interviewer name: ___________________________________