



Know-how for Horticulture™

**Consumer research in
relation to garden
water attitudes and
practices**

Richard de Vos
Nursery & Garden Industry
Australia

Project Number: NY03037

NY03037

This report is published by Horticulture Australia Ltd to pass on information concerning horticultural research and development undertaken for the nursery industry.

The research contained in this report was funded by Horticulture Australia Ltd with the financial support of the Nursery Industry.

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ISBN 0 7341 0885 0

Published and distributed by:
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A STUDY OF GARDENING BEHAVIOUR & ATTITUDES IN THE CONTEXT OF WATER RESTRICTIONS

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February 2004

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1. BACKGROUND

Nursery & Gardening Industry Australia [NGIA] in conjunction with Water Services Association of Australia (WSAA) conducted the following comprehensive study of consumer attitudes and behaviour relating to water usage in domestic gardens. This study follows a review and analysis of recent, current and planned activity by government, water authorities and other “influencers” which have a bearing on the destiny of the gardening industry.

A third phase will entail a review of the best watering and water conservation practices and products. The aim is to develop relevant information/guidance, based on sound science.

Combined, the output from the above will assist NGIA in developing and implementing strategies that will:

- Promote and maintain appropriate gardening practices in relation to water use in domestic gardens.
- Ameliorate the detrimental business/profit impact of the threat and then imposition of restrictions on domestic garden water use.
- Position the Nursery & Gardening industry and its members as responsible and pro-active in encouraging the conservation and wise use of water in domestic gardens.

Throughout the report the term ‘waterwise’ is used in a generic sense rather than as a brand. For convenience we have used the spelling waterwise.

2. RESEARCH OBJECTIVES

NGIA regards this study as the first definitive examination of gardeners' attitudes to water use in their garden, current practices, responses at times of water restrictions and triggers and barriers to change.

The objectives were to:

1. Build a comprehensive picture of garden owners' knowledge and understanding of the issues as they relate to garden water use and domestic water restrictions; their current attitudes; and their current practices.
2. Provide a benchmark against which this knowledge and understanding, attitudes and practices can be measured at some time in the future.
3. Describe the motivations and barriers to changing those attitudes and practices.
4. Provide specific recommendations on the strategies the industry and its participants might adopt to achieve the three aims

3. METHOD

This study combines qualitative and quantitative insights into the attitudes and behaviour of NGIA's key gardening target market i.e. primary shoppers in the household for gardening items who have purchased such in the past 6 months.

Perth and Gold Coast residents were included in the group discussions to tap the experiential responses of people who have had varying time frames in which to adapt to mandatory restrictions. Sydney, Melbourne and Brisbane residents were included as combined; the three capital cities generate a major share of the business of members of the NGIA. Adelaide was included in the quantitative component, together with Perth, to ensure that primary capital cities were sampled.

Qualitative - Ten Focus Groups

Previous research conducted by Creative Dialogue Pty Ltd on behalf of NGIA indicates that garden owners fall into different segments. The following table indicates firstly the size of each attitudinal segment and then its share of the Total Annual Nursery Expenditure when last measured in 2001. The first four segments represent 62% of the customer base and account for 79% of the expenditure. The other three segments each have important pressures like time, money and a preference for cut flowers over plants. This indicates these last three segments are only peripheral to the future of the industry.

Table 1: CLUSTER SHARE OF REVENUE

Size	Share of \$	Cluster
%	%	
20	30	Self Expressionists
16	23	New Seekers
14	16	Green Thumbs
12	10	Not Confident Loyals
11	4	Time Poor
16	8	Bargain Hunters
11	9	Cut Flowers

It was deemed important to further develop NGIA's understanding of the underlying motivations of its key target segments specifically in relation to their water usage practices and the barriers and motivations to change.



The ten focus groups were conducted by Michael Brownlee between 20th October and 10th November 2003:

Respondents	Segment	City
6	Self Expressionists	Sydney
9	Self Expressionists	Melbourne
8	New Seekers	Melbourne
8	New Seekers	Perth
9	Green Thumbs	Brisbane
8	Green Thumbs	Sydney
8	Not Confident-Loyals	Gold Coast
9	Not Confident-Loyals	Brisbane
9	Change Focus	Perth
9	Change Focus	Gold Coast

Each group involved the core members (usually 4 people segment members e.g. Self Expressionists) and the remaining four or five were a cross section of the other key segments.

Respondents were the person in the household “*who does most of the shopping for plants and other garden products*”. The respondents were selected to represent shoppers at the various channels of distribution as well as their predisposition to the attitudinal segment. All respondents had gardens. The sample excluded flat and unit dwellers.

In Perth respondents were also pre-qualified in terms of their changed behaviour in response to the water restrictions.

Quantification – 421 Telephone Interviews

The output from the qualitative sessions was a questionnaire used as the basis of a national survey. The questionnaire is appended.

Respondents in the national random telephone survey were the primary purchaser in the household of Gardening Products.

The sample was:

	Interviews
Sydney	120
Melbourne	120
Brisbane	60
Perth	61
Adelaide	60
Total	421



4. EXECUTIVE SUMMARY

This study provides a benchmark of garden watering practices. Hand held hosing predominates in Sydney, Melbourne and to a lesser extent Brisbane. The incidence of installed watering systems is highest in Perth (82%) where 25% of respondents also report having a bore. Sydney has the lowest incidence of installed watering systems(18%). Three in five installed systems are on a timer, but virtually none have soil moisture sensors.

A large proportion of people (88%) believe they are/have become highly efficient in their water usage, inside and outside the house. On average householders estimate that water used on the garden represents less than 20% of their total household consumption.

Consumers report an overall decline in the frequency of their visits to gardening retailers. The garden centre share of visits (8 per year) is down 30% and hardware (9.3 per year) is up 22% compared to that reported in Spring 2000

Many have stopped watering the lawn (51%), 23% have stopped buying seedlings, 16% have given up on their vegetable patch and 6% have stopped watering their garden altogether.

A significant 62% in the last 12 months because of the watering restrictions have actively sought solutions so that “they can still have a beautiful garden”.

- 63% mulched
- 38% planted plants, other than natives, that require less water
- 29% planted native plants
- 37% used a soil wetting type product
- 33% bucketed bath &/or shower water to use on the garden
- 28% recycled washing machine water
- 21% replaced or reduced lawn
- 20% installed or investigated a water tank

People fall into two broad categories as to whether or not they are prepared to make changes and adapt to the constraints imposed by the water restrictions. The restrictions message is processed as a series of injunctions. All the initial publicity is bad. The response by approximately 28% has been to stop rather than modify their behaviour with regard to their garden. The Nursery Industry will be hard pressed to generate sales from these people.

The other 72% are prospective consumers of a range of products and services. However the Nursery Industry has to be proactive in drawing this latter category's attention to these products and services. The 72% is made up of 17% who are the high involvement gardeners and the Nursery Industry's core customers.

There is a DIFM (do it for me) segment (18%); another 14% think and act DIY once provided with the relevant information and advice.



Another 13% have registered negative emotions associated with the water restrictions but will respond to proactive solutions provided by the Industry. There is a core of 9% who are “driven” to save water.

The clear message is that these 72% want the Nursery industry to be positive and proactive.

This study used qualitative insights and quantitative measures to assess a range of initiatives the Industry should undertake, alone or possibly in conjunction with other stakeholders. The quantitative measure asks respondents to indicate their level of interest a range of products/services. The one exception relates to the appeal of Waterwise Accreditation of garden centres – respondents were asked the degree of importance they placed on accreditation. The overall interpretation is indicative

	Score	Interest/ importance %
In some nurseries/garden centres there are now displays of 1, 2 and 3 drop plants. A three drop plant requires more water than 2 or 1 drop plants. A one drop plant requires very little water to be grown easily and successfully. What do you think of the idea of communicating the plant's water needs as 1, 2 and 3 drops?	4.24	58
How important is it to you that a nursery/garden centre is waterwise accredited? That is, has a display of plants that need less water, information available for you on garden watering and its staff have been trained to advise on water efficiency in gardens in your area.	4.29	49
If the Nursery Industry, your local water supplier and the council sponsored a display, during this summer of products, plants and services that would assist you to have a good looking garden and stay within the water restrictions.	3.90	32
If your preferred nursery/garden centre invited you to attend a workshop at a convenient time that was about plants and services that would assist you to have a good looking garden and stay within the water restrictions.	3.30	18
You go to a website, type in your suburb, soil type and garden type and it will provide suggestions to assist you to manage your garden in terms of water and plant selection	3.08	33
One Stop Grey Water recycling service where all the latest designs & equipment are in one place to provide advice or installation	3.07	25
A One Stop Rain Water Tank Service where all the latest designs & equipment are in one place to provide advice or installation.	2.93	25
You invite a specialist to come & check-out your garden and give you advice on your watering system. If your system gets a high rating you will get a rebate on your water bill.	2.90	26
Retail outlet that specialises in garden watering systems with a broad range of pipes, timers & options	2.75	10
A Mulching Service, they come to your garden, work out the mulching needs, deliver & spread.	2.50	17
A garden expert is available to check out the plant selection and placement in your garden. They can make suggestions to maximise the water efficiency based on what you want from your garden.	2.42	13

The 1-2-3 concept generates the most interest and involvement of all the test initiatives. The majority of gardeners want to be water efficient but not all are prepared to let go of their attachment to plants that are not necessarily one drop. At one extreme, many people interpret the offer that a specialist comes and checks out your garden's water efficiency and there may be a rebate, as a water Nazi approach. Ultimately they can say no I'm not interested.

Seeing the colourful Kangaroo Paw which engagingly talks to you at point of sale they do not feel confronted but at least consider. The 1-2-3 concept gives them more scope to consider whilst still being non confrontational. The challenge for the Industry is to promote varieties of waterwise plants that go beyond strictly native or succulents.

The model display has relatively strong appeal because it is seen as drawing relevant stakeholders together. Local councils are often seen as flaunting the water restrictions they help police. It would be in their interests as well as the nursery industry and the water supplier to be educating and advising on water efficiency without compromising the beautiful garden.

Relatively speaking DIFM test concepts did not generate the same levels of involvement as suggestions about hardy plants. For the majority of gardeners there are cost implications associated with having someone install automatic irrigation systems, implementing (acceptable to Council) grey water solutions and/or installing rain tanks. However the findings indicate niche marketing opportunities.

The relative appeal of a waterwise website highlights an opportunity for the Nursery Industry. A significant proportion of people want to seek out authoritative information about water efficiency and gardening but due to time constraints may shop at a Bunnings for convenience and may not have visited an independent garden centre for some time. There is a win – win opportunity for the Industry to motivate these customers to purchase in store.

The positive reactions to the various point of sale concepts tested (i.e. waterwise section and product display, information booth, 1-2-3 drop identification of plants) highlight that customers will respond by purchasing if they are proactively communicated to by the retailer. This assumes however that they have been sufficiently motivated to be in store.

There are two key findings which confirm that The Nursery Industry can effectively communicate its waterwise message to gardeners:

- One in two respondents nominate garden centres/hardware as a credible source about water efficiency and gardening
- Four out of five of the ways people would like to get useful information are controlled by the industry. The incidence of mentions was letterbox (65%), display in store at garden centre (58%), garden show or festival (35%) and the Web (31%)

This study revisited the segmentation derived in previous studies. It is based on peoples' interest in their gardens and their retail behaviour and has shown that the Nursery Industry is dependent for most of its revenue on four segments – Green Thumbs, Self Expressionists, New Seekers and Not Confident Loyals. This study indicates because of water restrictions Not Confident Loyal people are the segment most impacting the loss of revenue to the industry.

Throughout the study the New Seekers in particular respond to proactive information from the nursery industry. They are more likely to be establishing a new garden and are open to water efficiency solutions [DIFM & DIY].

People with established gardens are less interested in major changes to the style of their garden. They are more focussed on finding solutions that don't change their plant selection but do deliver efficient watering solution [e.g. a new watering system].

There are polarised attitudes towards water restrictions

55% believe the restrictions are appropriate

13% feel they are too restrictive

11% feel they don't go far enough

20% say they have not impacted [Brisbane & Adelaide]

The majority in the middle find it easy to rationalise the reasons for the water restrictions:

Awareness of the recent worst-this-century drought

The climate is changing

Global warming

Poor government planning

Population explosions

There are two segments at the extremes. There are those who feel put upon by the Level 2 restrictions and that they are too restrictive. Many are New Seekers. This segment are ego driven. At the other extreme are the people who have a global, green belief system [11%] and think the restrictions don't go far enough.

The imposition of water restrictions has had a significant impact on peoples' gardening behaviour and shopping for nursery products. The higher the level of restriction the larger the impact. The people who think the water restrictions are not strict enough also tended to think they were permanent. If they thought the situation was permanent they found it easier to rationalise spending money on new solutions.

57% thought the restrictions would be permanent

23% thought they would be temporary

20% said it was hard to say

A key finding amongst Perth consumers is the high incidence of the belief that the restrictions are permanent [82%]. Qualitatively respondents verbalised their experiences of major restrictions, how they reacted negatively at first and now some two years later know that with a little adjustment they can have a beautiful looking garden.

5. CONCLUSIONS & RECOMMENDATIONS

1. There are opportunities for the industry to encourage sales of products and services which require clarification of technical information couched in lay terminology. Some of these may warrant inclusion in the proposed third stage of NGIA's research, a review of the best watering and water conservation practices. e.g.
 - clear enunciation of specific Council rulings on grey water systems for residents. This is may be addressed now that Standards Australia have produced a new standard.
 - comparative data on water flow from drip versus spray systems for those needing to be convinced to convert from spray to drip; data on the relative efficiencies of drip versus hand watering
 - how does one determine when one is over watering individual plants and garden beds
 - there is a dichotomy in consumer perceptions about whether or not plants in pots are water conserving. People respond very positively to simple, practical water saving solutions e.g. many could be encouraged to have colour in pots including a soil wetting product, close to the house, watered by recycled shower water.
 - More information about mulching – recommendations about type, depth etc.
2. **Think nationally, act locally** ... We recommend that the Nursery Industry have a strong Web based presence [the ideal would be Waterwise.com.au] which goes hand in hand with on the ground local retailer/service provider knowledge. People want localised information about plants, soils types etc. and are accepting of some commercial aspects such as retailer and service provider details.
3. The industry should encourage joint participation with water suppliers and councils to establish models so people can come and see examples of Waterwise Gardens. 32% of people in the telephone survey indicated they would definitely visit a waterwise garden display. We usually discount this by 50%. This is still one in six gardeners interested in learning this way. Applying the same principle 9% or one in 11 people would attend a workshop offered by their preferred Garden Centre.

4. **The Industry needs to be positive and proactive.** Its primary target are those Green Thumbs, New Seekers and Self Expressionists who have not abandoned the Garden Centre but need point of sale stimulation to adopt more active waterwise practices. The secondary target is gardeners, particularly those establishing new gardens, currently not customers of a particular garden centre who may respond to an impactful waterwise call to action.

To this end we recommend the industry produce an Activity Kit including:

- Examples of Questions to ask “*What is your postcode?*”
 - Examples of forms to collect names, addresses and Emails when the customer is told what the purpose will be e.g. invitation to a workshop
 - Sample programs
 - Call to action sample fliers for letterbox distribution
 - Sponsorship so attendees can walk away with samples
 - How to localise the information
5. The strong positive reaction to the waterwise concept, products and services indicates that this is a concept whose time has come. It addresses a major need. Therefore showing what can be achieved will provide some of the reassurance that is needed to re-motivate many gardeners. This study finds that people today want a beautiful looking garden that is waterwise (water efficient) and requires the least amount of work (easy care).
 6. The nursery industry should work with and support a national Waterwise program in partnership with other relevant stakeholders to educate, facilitate and get relevant products and practices into peoples’ home. The Waterwise concept has huge scope and flexibility.
 - The Waterwise name, logo and livery test well.
 - The Waterwise products, plants, services and accreditation are well accepted by respondents in all markets.
 - The Nursery industry should use its members to improve the educational material so that the information can be locally based.
 - It is crucial that the industry should be in control of the creative execution of any associated advertising.
 7. We recommend an annual city-based Waterwise competition.
 8. Encourage the use of 1-2-3 Drops at the retail level. While this encourages one section of the industry at the expense of another, the critical point is that it answers peoples’ needs and encourages them to return to the garden centre/ increase expenditure at the garden centre.



9. **Position the industry as the credible authority**, encouraging Australia's gardeners to be responsible and have a beautiful looking garden under water restrictions. The Industry has credibility in this area. It needs to be proactive and customer focussed. This means nominating relevant spokespeople in each market to take a higher profile with media about being Waterwise. People are seeking a positive voice as a counter balance to the negative communications and injunctions. The industry should be that voice. It should also use its strength of local knowledge and expertise.

Currently, the Industry is not perceived to be actively helping people adjust to the water restrictions. People tend to see it as suffering, having difficulty surviving and badly impacted by the water restrictions. **It is critical that the Nursery Industry provides a positive, knowledgeable, reassuring voice. If it does nothing sales and customers will be lost.**

6. COMMENTARY ON FINDINGS

This section integrates both qualitative and quantitative findings.

Quantitative tables provide the magnitude of the findings and quotes from the focus groups embellish upon the interpretation of results

6.1 WATERING PRACTICES

In the telephone study, before people became aware of the topic, respondents were asked about their current watering practices. The results provide an overview of the situation and will act as a benchmark against which to measure future change.

6.1.1 Current watering behaviour

The hand held hose predominates in Sydney, Melbourne and Brisbane.

Penetration of installed watering systems is lowest in Sydney [18%]. The 82% in Perth reflects the reported penetration of 25% of people with bores and the success of specialist irrigation retains.

Table 2: CURRENT WATERING BEHAVIOUR BY CITY						
<i>“How do you normally water your garden?”</i>						
	Total	Sydney	Melbourne	Brisbane	Adelaide	Perth
Base	421 %	120 %	120 %	60 %	60 %	61 %
Hand held hose	72	89	82	73	52	36
An installed watering system	40	18	28	43	62	82
A sprinkler I move about the garden	15	11	8	33	18	13
Totals	126	118	118	150	132	131

The following table indicates that 8% of people with an installed watering system, installed that system within the last 12 month. The above figures include that 8% detailed over page.

Installation of a watering system was highest in Brisbane [15%].

Table 3: WATERING SYSTEM INSTALLATION IN PAST 12 MONTHS						
<i>“Which of the following have you done in the last 12 months because of the watering restrictions ...”</i>						
	Total	Sydney	Melbourne	Brisbane	Adelaide	Perth
Base	421 %	120 %	120 %	60 %	60 %	61 %
Installed a watering system	8	8	5	15	10	7

Respondents were asked for details about their installed watering system:

Micro-spray systems are strongest in Melbourne. Perth with the use of bores has more fixed sprinkler systems. Drip system are strongest in Adelaide.

Table 4: TYPE OF WATERING SYSTEM						
<i>“How does the system work?”</i>						
	Total	Sydney	Melbourne	Brisbane	Adelaide	Perth
Base	168 %	22 %	33 %	26 %	37 %	50 %
Micro-spray system	69	64	79	69	65	68
Fixed large sprinkler system	23	14	6	23	8	48
Drip system above the soil	20	14	12	23	32	16
Drip system under the soil	12	18	15	4	19	6
Some other	2	0	3	0	0	4
Totals	125	109	115	119	124	142

Asked about timers and soil moisture sensors respondents indicated the following:

Table 5: INCIDENCE OF TIMER & MOISTURE SENSORS			
<i>“Is that on a timer?”</i>			
<i>“Does it have a soil moisture sensor connected?”</i>			
	Base	On timer %	No soil moisture sensor %
Micro-spray system	116	60	97
Fixed large sprinkler system	38	71	95
Drip system above the soil	33	61	94
Drip system under the soil	20	65	100
Some other	3	67	100
Totals	210		

Of those who installed a watering system 73% were DIY and 27% Professional. There is the opportunity for both Hardware and Garden Centres to either supply or be the gatekeeper for both DIY and DIFM.

Table 6: INCIDENCE PROFESSIONAL/DIY INSTALLATION	
<i>“Was the garden water system professionally installed or Do It Yourself?”</i>	
Base	34 - People who installed a watering system
	%
DIY	73
Professional	27
Total	100

Table 7: INSTALLER PROFILE <i>“Was that done by ...?”</i>	
Base 9* - People who had a professional installation	%
A landscape gardener	67
A professional garden watering specialist	22
Someone who provides gardening services	11
Total	100

* Note the small base of 9 people

Of those who had a watering system installed by a Professional group most were by a Landscape Gardener [67%]. The numbers are very small and should be thought of as tentative rather than indicative.

6.1.2 The main focus is on water used inside the house

Although the focus of the groups was on water restrictions and the garden, respondents kept moving their discussion of water saving back inside the house. This is partly in response to the print material they are receiving from their local water supplier encouraging adoption of water saving devices and reduction of water usage.

People go through the process of identifying:

- Using less water [e.g. timing showers]
- Not using water [e.g. using electric toothbrush]
- Capturing wasted water [e.g. 1st 2 litres of shower]
- Saving the water for plants

Table 8: ATTITUDE TOWARDS SAVING SHOWER WATER

Base =421	Score	Agree %	Disagree %
I don't mind saving shower and washing machine water for my garden	3.7	66	21

The closer the score to 5 the greater the agreement

While 34% 'strongly agree' that they don't mind saving shower and washing machine water for their garden this increases to:

- 51% for Green Thumbs
- 47% people with high maintenance gardens
- 54% those 18-24.

Those who saved water tended to be from the poorer socio-economic homes.

"Save water when I do the vegetable or when washing fruit. My bucket is permanently in the sink."

"I have the overflow from the shower".

"Don't wash potatoes under running water. Have a tub. It all goes on the garden."

People in the Gold Coast were desperate to find ways of saving water for their gardens. Those who are willing to save the shower water feel very good about this activity and enjoy nurturing their garden.

As the following table shows respondents regard the outside use of water as minimal [17%] in the overall household consumption. This is particularly the case in Sydney and Melbourne.

Table 9: CONSUMER PERCEPTIONS OF THEIR HOUSEHOLD WATER CONSUMPTION		
<i>“What percentage of your household water would you say is used outside the house for example on cars, the garden and the pool?”</i>		
<i>“Of the water used outside of the house how much would you estimate is used on the garden?”</i>		
Base =241	Outside	On Garden
Percentage	%	%
0	2	5
1-10	48	1
11-20	16	2
21-30	10	1
31-40	6	.4
41-50	6	1
51-60	1	5
61-70	0	2
71-80	.2	10
81-90	0	13
91-100	.2	39
Don't know	10	10
Average	17.2%	81%

Melbourne	11.2	95.0
Sydney	14.8	82.0
Brisbane	21.4	70.6
Adelaide	23.6	79.0
Perth	26.0	58.7

Respondents in four focus groups were shown a print advertisement from Yarra Valley Water that said:

“Approximately 35% of household water is used on the garden, so this is a good place to start reducing the water you use.”

Respondents did not believe this figure at all.

“I don't believe that 35% goes in the garden. Pre-water restriction maybe. Or they don't have a clue.”

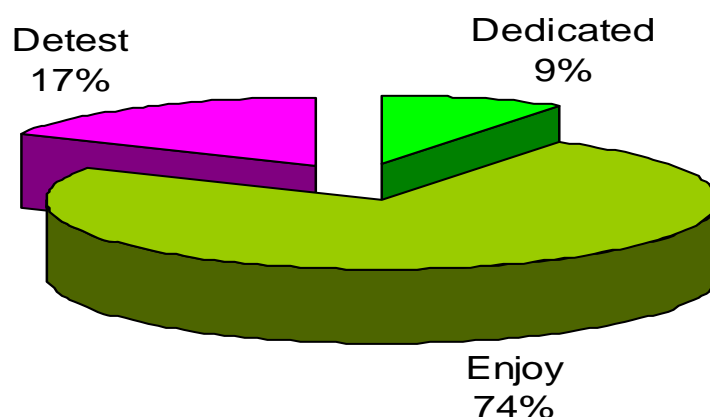
“It's so hard to gauge.”

6.2 ATTITUDES & PERCEPTIONS

6.2.1 Attitudes towards gardening

Attitudes are all about emotions and under mandatory water restrictions the pleasure and enjoyment of the garden and gardening are being replaced for many by fear and scare. To put the responses into perspective one needs to understand the spectrum of feeling expressed about gardening.

Overall gardeners across Australia fall into three groups:



There is a hard core 9% [down since 3% since Spring 2001] who are dedicated gardeners and say nothing else competes. These people love their gardens, spend a lot of time in the garden and are highly motivated towards their garden.

The majority of gardeners say they enjoy gardening but there are also other activities that compete for their attention. This segment is 74% of households and has increased by 6% since we last sampled this market in Spring 2001.

Finally, there is a segment of 17% who say gardening is a chore, that they only do what it is necessary. This segment has declined 3% since Spring 2001.

The attitudinal cluster analysis shows how these segments break down in terms of their love of the garden.

Table 10: ATTITUDES TOWARDS GARDENING

“Which of the following best describes your thoughts about gardening?”

	Total	Cut Flowers	Bargain Hunters	New Seekers	Self Express ionists	Green Thumbs	Time Poor	Not Confident Loyals
	%	%	%	%	%	%	%	%
I enjoy it, nothing else competes	9	0	0	14	17	13	2	2
I enjoy it but other activities compete	74	68	69	79	79	81	63	68
It's a chore. I only do what is necessary	16	32	29	6	4	6	34	30
I detest it	1	0	2	1	0	0	1	0

Those who love gardening tend to be from The Self Expressionists [17%], New Seekers [14%] and Green Thumbs [13] segments.

The 74% who enjoy their garden and also have other interests are represented across all clusters.

Those who regard gardening as a chore hardly buy plants, tools or other gardening items. The Time Poor, Cut Flowers and Bargain Hunters feature prominently in this segment. These people represent 65% of those who responded to the restriction by letting their garden go.

Emotional attachment

Emotional attachment to the garden tended to define whether or not people decided to fight or abandon their garden:

Overall 59% agree that they have a desire to look after their garden under their current water restrictions. The nursery industry needs to win back greater retail behaviour from this segment who are positively motivated.

Table 11: MOTIVATION TO LOOK AFTER GARDEN <i>“I will read out some statements. For each, please tell me whether you agree or disagree”</i>			
Base =421	Score	Agree %	Disagree %
I love my garden so much I really do want to look after it	3.6	59	23
The closer the score to 5 the greater the agreement			

28% of the total sample love their garden and **strongly agree** that they want to look after it through the restrictions. This is 40% for Green Thumbs and 38% for New Seekers. These are the two most highly motivated clusters.

- 38% of the Perth people agreed strongly with this statement
- 35% of those who would attend a Garden Centre seminar also strongly agreed

The 23% who disagree with the statement are the segment that under the water restrictions have tended to do less gardening.

40% see their garden as an investment

Table 12: INVESTMENT IN GARDEN <i>“I will read out some statements. For each, please tell me whether you agree or disagree”</i>			
Base =421	Score	Agree %	Disagree %
I have spent too much on my garden not to keep it looking good	3.0	40	43
The closer the score to 5 the greater the agreement			

There is a core of 15% who ‘strongly agree’ with the statement. 34% of the Green Thumbs and 23% of the high maintenance gardeners strongly agree. These people are strongly motivated to find solutions to having a beautiful garden during the water restrictions.

The focus groups highlighted that the well established garden people don’t want to change the style or structure of their garden. Rather they want to continue to have a beautiful looking garden while keeping to the restrictions.

“I’d rather not shower than the plants miss out” [Green Thumb]

“It adds character to the house.”

“We use the beauty of the garden to sell the house. On those DIY shows they always bring in a million plants.”

For many of the investment oriented, the water restrictions have impacted on their garden ... 34% were from the group who thought that the water restrictions were too restrictive.’

People expressed strong emotions about gardening

The following sourced from the ten focus groups, conducted in five cities are presented here to show the depth and richness of peoples' gardening experience and the strength of the emotional attachments.

The garden remains **a major source of spiritual renewal:**

“Spiritual – It relaxes me; It makes me feel peaceful when I go outside content with the work we did; It is my sanctuary; Peace, makes me feel good; It is every part of me being a creative person. It’s life. It’s very soothing; It’s a haven. I lock off the rest of the world. Love it when it looks good but hate pulling out weeds and cutting trees; Peace, tranquility, sanctuary; Serene; Therapeutic If I did not have my garden I wouldn’t have my sanity; I enjoy. I relax. Love it in the Springtime; Its our contact with nature. Our need to commune with nature for big city dwellers.”

For many who love **their garden it is a SEE-FEEL experience.**

“Love my garden, love to enjoy it; I love to purchase, my husband loves to plant; I love to see a lot of green and colour; Everyone loves to see green. It’s a shame to see it die ; I love flowers its pretty, fresh; It makes me feel good; My garden is pretty I love my garden. I love the colour; I love being in my garden. It is relaxation. Like to see all the colours. Like to see it looking lovely; I really love my garden. Just to potter around early in the morning. Nothing nicer than to sit outside in this weather; I love my garden always. Everyday; We’re good mates.”

In good times the garden is a major source of satisfaction and sense of achievement:

“I do the front, husband does the back. I get lots of satisfaction; I enjoy looking at what I have grown, a sense of achievement, satisfaction; Rewarding hard work.”

“I said to myself ‘That looks good ... What a clever girl I am’”

Particularly for men, the gardening is stress release:

“Stress relief; I can get away from the stress of my world; Calming. I like to look out at it. Now have lots of things in pots. [Stage 2 restriction in Melbourne]; It relieves the stress but it does frustrate me.”

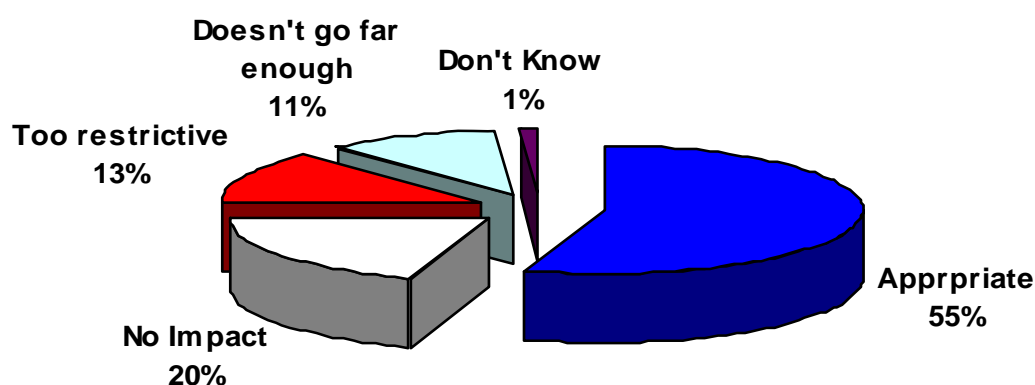
Gardens attract birds:

“I wanted the birds. The symbol of my garden is this bird’s nest. I get a kick from showing my kids the birds. The kids seeing the birds being born and raised. I hear them first thing in the morning. You can watch the whole process; I want birds, greenery, coolness shade. [Gold Coast].”

6.2.2 Attitudes towards the water restrictions

Normally change in behaviour follows change in attitudes and perceptions. The situation with mandatory water restrictions is different in that people must first change their behaviour. Consequently perceptual change [boring pebbled areas transform into trendy Tuscan style] and emotional reactions [all too hard] follow the behavioural change. This section looks at current emotions which are the key to reviving Nursery sales.

Australians are generally compliant to mandatory situations. However the quantitative telephone interviews indicate there is a spectrum of attitudes towards water restrictions. **The defining polarity relates to ego involvement versus global thinking.**



20% DOESN'T REALLY IMPACT ME ... *“What water restrictions?”*[Brisbane] 38% of the Brisbane people [where there has been restriction for a long time] gave this response. The designated watering days have become a fact of life not a restriction. The 30% in Adelaide also suggests that people are less impacted by water restrictions in this city.

13% FEEL THEY ARE ‘TOO RESTRICTIVE’ ... 32% of those who want to do something but don't know how, 26% of those who say its all too hard so they are doing less. The incidence in Sydney is 21%, also 21% of Green Thumbs, 21% of those who think it is a temporary thing and 20% of those with a high maintenance garden. This segment feels that the restrictions impact on their personal space. **It is an ego thing.**

55% FEEL THEY ARE ‘APPROPRIATE’ ... 67% of the Melburnians, 62% of people with a newly establishing a garden.

11% FEEL THEY ‘DON’T GO FAR ENOUGH’ ... 30% of those married with no children, 17% who believe they will be permanent, 15% of the Self Expressionist and Time Poor segments, 14% of Melburnians. **These people see the problem as permanent and global.**

The following table highlights how the severity of the water restrictions impacts on attitude:

Table 13: ATTITUDES TOWARDS WATER RESTRICTIONS						
<i>“What do you think of the current water restrictions ...”</i>						
	Total	Sydney	Melbourne	Brisbane	Adelaide	Perth
Base	421	120	120	60	60	61
	%	%	%	%	%	%
They are appropriate for the current situation	55	51	67	47	50	56
They don’t really impact on me	20	16	9	38	30	23
They are too restrictive	13	21	10	7	8	12
They don’t go far enough	11	12	14	8	8	8
Don’t know/ Hard to say	1	1	0	0	3	2
Totals	100	100	100	100	100	100

There is variation by city. In Perth 23% say it doesn’t impact them because many there have a bore. People in Sydney at the time of the research were just getting used to the new water restrictions and 21% felt they were ‘too restrictive’.

The dedicated focussed gardeners segment has been highly impacted by the water restrictions. Their support for the water restrictions is polarised ...they are more likely to think the restrictions are either ‘too restrictive’ or ‘not restrictive enough’. This segment has a slightly older age representation. They tend to be from the Green Thumbs, Self Expressionist and New Seekers clusters.

6.2.3 For 28% the initial response is negative

Enforced water restrictions have had a major impact on garden water use practices and on how people feel about their garden. Rather than cut back on watering many have ceased watering all together.

For many the initial reaction to water restrictions is one of fear about the restrictions followed by some consciousness raising about the issues as they effect the individual (loss of enjoyment), household (shorter showers) and community (perceptions of water waste).

The combination of messages about compulsion, restrictions, fines, punishment and negative publicity evoke a fear-scare type response, what the psychologists call The Adapted Child response. For some it is all too hard.

In section 6.3.3 which highlights behavioural responses to water restrictions, the analysis suggests that 38% delay or say 'it's all too hard' and 62% actively seek solutions. The Industry needs to reassure the first group and provide answers for the second.

Part of the reason for compliance generally is that the restriction taps into some strongly held community beliefs. These perceptions give the whole area a very strong dynamic which facilitates behavioural change.

People talked in the focus groups about:

- Drought [the opposite iconography of a beautiful, lush, fresh garden]. *“We live on the edge of the hottest continent in the world. I have now set it up for those conditions”*
- The climate has changed – *“I thought about bloody time. We are the driest continent on earth. The rain pattern has changed.”*; *“We don’t get rain like we used to” [Brisbane]* *“There is so much talk that we’re not going to have as much rain in the future. So we have to use less water. We need to be educated about using less water. Its all part of the world we now live in”*
- Global Warming ... *“I believe this will be around for a long time, with population growth and expansion. We have to changeed our habits.”*
- Poor planning by the government [*Dams not where the catchment is*] ; *“This is more important than the Olympics. Why did the restrictions start so late?”*.
- Explosion of population [*“The council haven’t allowed for the expansion of people on the coast.” [Gold Coast]*]
- Water is a precious resource that has been wasted in the past

The nursery industry should tap into these community belief systems when promoting water wise products and services.

The *'she'll be right mate, the rains will come'* attitude is being replaced by a different perspective and expectation [This is true in Perth and on The Gold Coast].

With regard to the garden, people worry about plants dying, the costs [plant replacement and via the water bill for water used on the garden] and the change in their enjoyment:

- Death:

"The thing that worries me is that the garden will dry up and die"

"My lawns mostly dead [Gold Coast]. I going to dig it up. I might turf it when the rains come. Some decent turf that will survive the drought. Lot of Golden Palms. Few potted plants in season to brighten the plants up."

"You see photos of leaking pipe and thing why do I both. How much more is wasted. They should be looking at this first. I don't use the sprinkler anymore. My plants are dieing off because I am too afraid to water them."

- Costs:

"It's going to cost me a lot of money over time"

"My fear is I'll lose my plants and it cost you money"

"I don't want to loose my lawn. It cost me a lot of money. If I don't water it after a week it looks deadly. It cost \$400."

"Here the answer is just to survive. [Gold Coast]. What's the point in spending all this money trying to keep something alive when you know the drought going to be with us for a long time."

The factor analysis in section 7.4 shows that two of the seven segments loaded specifically on feeling sad. One group feels sad about their loss of enjoyment and seeks solutions. The other segment feels sad and does nothing about the situation.

The following table provides insight into those who focus on negative emotions. This has major retail ramifications both short and long term.

Table 14: INVESTMENT IN GARDEN			
<i>“I will read out some statements. For each, please tell me whether you agree or disagree”</i>			
Base =421	Score	Agree %	Disagree %
I feel sad about what is happening to my garden	2.5	26	60
Water restrictions have reduced my enjoyment of my garden	2.2	19	70

The closer the score to 5 the greater the agreement

FEEL SAD - While only 9% agree strongly they feel sad about what is happening to their garden, this segment accounts for 21% who think the system is too restrictive, is 18% of the Green Thumbs cluster and 13% of the New Seekers, 12% of those with high maintenance gardens and 23% of those who don't know what to do and 14% of those who love their garden.

REDUCED ENJOYMENT - The results are made up of 6% strongly agree and 13% agree. This is strongest amongst Green Thumbs and people who say they are 'too restrictive' [23%],

This response is stronger amongst Green Thumbs [10%], people from Brisbane [10%] and Perth [10%], people who say it's 'too restrictive' [23%] and those who don't know what to do [16%]. This is also twice as likely to be a male reaction.

Some of those who enjoy the garden as a stress releaser are aware that because they no longer water their enjoyment has decreased.

“What has changed is the quiet time hosing my garden and talking with my neighbours. You don't go outside. Especially on a hot summer's night.”

“Over the last two years my garden has pretty much died. I don't garden as much as I used to.”[Perth]

Some, having stopped watering their garden, have found their time is now spent elsewhere. The Nursery industry will need to reintroduce these people to the joys of gardening.

“Watering is not a priority for me as a mum.”

“Not as good as it should be. I don’t spend as much time there.”

“Gardening was a chore. I now go play golf” [Gold Coast]

6.2.4 Zones of influence – Self, Household and Community

The process which starts at the individual level, through dialogue becomes a household matter then takes on a neighbourly and community aspect.

“I’ve had to change my thinking. I used to think eventually it will rain. But not now” [Gold Coast]

“I think everyone should do a little more.”

“If we all do a little bit.”

Respondents like that everyone is in the same boat, that the water restrictions (with a few exceptions) apply equally to everyone. Thus there is a sense of community when the water suppliers publicise the water levels in the dams either in the press or on TV each week.

“We pulled a lot of plants from our fernery because we are not allowed to use the spray and I’m not willing to drag the hose around. [Gold Coast]. It just doesn’t look as nice as it could but everyone is the same [Community perception].”

“It’s almost like manners keeping your garden orderly for the rest of the street.”

“Everyone has to change”

In every group, regardless of city, one would hear spontaneous references to council sprinklers and neighbours improperly watering lawns/concrete.

“My neighbour still waters his concrete.” [See-Feel]

“I really feel like ringing up and dobbing them in.”

“Some people are irresponsible.”

At the information level the strength of the Nursery retailers is they have the ability and knowledge to suggest what will work in one’s neighbourhood.

“I always think everyone else’s looks better than mine.”

“I replaced things that dried with hardier plants. I ask the Nursery . They give me a strange look “Why are you replacing them Hard to keep my mango try alive. [Gold Coast]. I water everything by bucket. Even the car doesn’t get washed. If you have a clean car people look at you”

6.2.5 7% show deep cynicism and reluctant compliance

This small group question why domestic customers have been asked to carry the burden of the water restrictions. They dislike seeing government or industry wasting water. In every market those who resist the restrictions would point to an example they were aware of [usually reported in the Media] blatant waste of water on a grand scale.

Particularly amongst men and working people there is a segment that are cynical that the government is placing all the blame, burden and responsibility on the domestic market rather than on the industry segment. This group resents the authorities [Government, Councils, and Water Suppliers], is critical and perceives them as having little credibility.

“The current system is poorly administered it’s restricted to days not the amount ones uses. It’s just a political exercise”

“It is not a free country because you get told when to water your lawns.”

“It’s all a cop out ... Look at industry. Look at the waste by the use car dealers Look at the leaks in the Burnley tunnel - water pumped in to support the tunnel. And its all drinking water. Why are we getting punished while industry is using and abusing.” [Melbourne]

“I went past Parramatta Park and saw their sprinklers going. I thought that’s not fair I can’t use my sprinkler.”

“They’re telling us to cut down and the Waterboard has huge pipe leakages.”[Sydney]

“And you think ‘they [The council] are fining me for wasting water!’ ... When I see those sprinklers on the roundabouts [Brisbane].”

“At the end of our street. Every now and again water gushes out. The Water Board know about it but they do nothing!”

“Pisses me off when you see the council anytime of day watering. We have to tighten our belts. You can understand why lots say bugger it. I don’t care.”

While 7% are deeply cynical, 87% are critical of council or other flagrant abusers of water.

Table 15: IRRITATION AT WASTE BY OTHERS <i>“I will read out some statements. For each, please tell me whether you agree or disagree”</i>			
Base =421	Score	Agree %	Disagree %
It irritates me to see council or others wasting water	4.5	87	7
The closer the score to 5 the greater the agreement			

As the above shows the broader gardening community wants everyone including suppliers, councils and nurseries to ‘walk the talk’ in terms of saving and not wasting water.

Most people believe it is not the individual but the government and the water suppliers who have been responsible for the need to introduce water restrictions. They quickly pin point the problem.

“There has been a lack of forward planning”

“Putting the dams in the wrong place”

“The amount of population growth”

“The government hasn’t been serious about this with their building codes.”

There is an underlying belief that the burden should not be solely upon the domestic market:

“They are all bashing the homeowner not the shops or the golf courses.”

6.2.6 Many gardens become associated with death

Symbolically people associate their garden with life and watering with nurturing life.

So when there is no watering [they over interpret the restrictions] the response often is a dying garden.

“Initially some of the garden died. In summer I watched my garden die. Damn. Bugger. I must water it. Two years later I need to replant. I think we’re going to put things in pots.”

“Initially the garden started to die. But we have a lot of natives and we did some paving. I was not happy about the water restrictions.”

“The lawn’s dead at the back. I have used some wetta soil.”

“Sometimes the grass cracks under your feet [Gold Coast]. I save water in buckets. Soil was resistant to drought. Then the ants came in. I saturate the soil with cheap detergent which the ants hate. Sugar cane was a disaster. The magpies love it. Use a lot of mulch. Things that don’t cope I have allowed to die. It used to be like everything was programmed to explode. Everything used to be green. Then the drought hit and now everything cracks under your feet. Initially I didn’t want anything to die but I have changed. Now it’s survival of the fittest.”

“I like looking at the potted colour. It is better than looking at death lane.”

One person brought to the focus group a picture of a drought dried, parched landscape. His fear was that this was the future, a landscape devoid of green and plants, barren and non productive.

6.2.7 Perceptions of fines and the Garden Nazis

Because of the psychology of the situation people split over the issuing of fines. As is well documented in the quantitative study peoples' attitudes tend to polarize with groups having extreme views about issues of restrictions and punishment. It is the awareness and perceptions of the fines that assist in changing peoples' behaviour.

“They are introducing fines. Only \$250. It should be on the amount of water you use. It's misdirected. Many can get exceptions. But you have to display a sign. To me they concentrate on the home user. I feel angry. Where is the check on them.”

“Why they don't come around often.”

“They are like the dog catcher [Gold Coast]”

The problem with this approach is that the water supplier is perceived to be both the persecutor and the source of advice and information to assist. This often does not work and is why there can be mutual benefit from strategic relationships amongst the authorities, the water supplier, the product and service suppliers and the nursery industry.

Many respondents did not like people in authority coming onto their land to tell that what to do. Since the water restrictions are being sold as 'mandatory' there is a reaction from some who label the authorities as 'Water Nazis'

“We're on level 2 ... Water is life. I'd go to natives. My highpoint of summer is sitting outside and watering. Its therapeutic I would risk the water Nazis.”

“Sounds like the water Nazis ... I don't think anyone will get 10 out of 10. Like the idea of a rebate. Don't like the idea of people coming into my house.”

“Policing!”

6.2.8 The majority of people adapt to restrictions

Many have simply adapted to the water restrictions adjusting their schedule so they work within the system.

“I’m more a go with the flow person.”

“I have adapted. The time I used to spend in the garden I now spend doing other things.”

“I have adapted but there are some hardy plants that have colour like gardenias that I would still like to grow.”

I bought more products like crystals and granules. I notice the magazines at the nursery. That’s a must. It tells you things you can buy to help. I don’t want my plants to die because of the water restrictions.”

“You adapt. You stop and think. No longer do we leave the sprinkler on all day.”

“Mulch, Aquasol bought at Big W my mother said it was very good, natives that don’t need watering at all. I am still adapting.”

In Perth where they have had the longest time to adapt gardeners have found they can have the garden their want, enjoy and stay within the water restrictions.

6.2.9 20% Say the water restriction has had no impact

“What water restrictions? We’ve had sprinkler restrictions for as long as I can remember” [Brisbane]

This perception is strongest in Brisbane where many people do not think there are any water restrictions.

“Because of the amount of rain we have it hasn’t affected me. [Melbourne]

“At the moment nothing because we got the rain [Melbourne].”

“The Gold Coast has restriction because they have no sprinklers. Here in Brisbane there are days and times but no restrictions. [Brisbane]”

“Is there a problem?” [Brisbane]

“At the moment my lawn’s beautiful with the rain [Melbourne].”

There is a segment of 8% who have adjusted in a different way:

Table 16: 8% CHOOSE AN ARTIFICIAL SOLUTION <i>“Which of the following have you done in the last 12 months because of the watering restrictions ...”</i>						
	Total	Sydney	Melbourne	Brisbane	Adelaide	Perth
Base	421 %	120 %	120 %	60 %	60 %	61 %
Bought artificial plants to make inside more colourful	8	10	7	7	8	8

6.2.10 88% believe they are now water efficient

Although the community message is about information, education and injunction, respondents personally believe that they are doing their best to save water.

Table 17: SELF PERCEPTIONS OF WATER EFFICIENCY

“I will read out some statements. For each, please tell me whether you agree or disagree”

Base = 421	Score	Agree %	Disagree %
I really think I am doing the best I can to save water	4.4	88	5

The closer the score to 5 the greater the agreement

88% agreed [made up of agree strongly and agree] with the statement *“I really think I am doing the best I can to save water”* ... Only 5% disagreed.

This opinion is strongest amongst the Green Thumbs [74% strongly agree] and the New Seekers [66%]. Melburnians see themselves as the most compliant city [73% strongly agree].

People in Perth and the Gold coast now believe they hardly use any water in their gardens and they don't think they “waste” any.

“90% our garden is water efficient all with bark chip. I used to be only 70% before.”

“I do the best I can. [Gold Coast]”

“Very little. I don't water much at all [Gold coast].”

“We have the type of garden if we don't water it, it doesn't die. Only water when it is absolutely necessary [Sydney].”

A few have become obsessional about being water efficient.

“I'm about 80% efficient. I start with the grey water which our council doesn't like. Lots of bark and pine mulch. Grey water becomes recycled water. I recycle the water depending on the detergents its very good for the plants, saves water. The Pine Rivers Council is against it. So I just physically bucket it. They can't do anything about that. Remember as kids saving the copper water. Gets rid of the grubs as well.”

For others there are price benefits:

“If you sprinkle the lawn there is wastage and you get a big bill. Lawn will always come back after it rains.”

Some people did not believe some of the ‘household use’ information that they were receiving from their water supplier. They believe they are doing a good job and can’t see how they can save more. When they read the literature from their water supplier they question its credibility:

“Checked on my bill, my kilopod blah, blah. They said we should be using half as much. I don’t water the garden. I can’t see how on earth we can use less. It seems to be unrealistic. We don’t stand and hose the garden.”

“They can’t restrict the hygiene area. Imagine no showers! There would be a change of government.”

There is an opportunity for the nursery industry to reinforce and reassure people about the job they are doing by offering encouragement with new choices and options

6.2.11 Temporary or permanent perceptions impact emotions and behaviour

In the focus groups it was clear that respondents' attitudes, intentions and motivations were driven by their belief about whether the current restrictions were temporary or permanent.

At the two extremes - Perth people [82%] perceived that there are major water problems and the restrictions would be permanent and may get worse. Because of this they are more willing to make purchases that have a major capital component [e.g. a bore]. Whereas in Brisbane people were not sure that there were restrictions and that it was The Gold Coast that had problems not Brisbane.

	Total	Sydney	Melbourne	Brisbane	Adelaide	Perth
Base	421 %	120 %	120 %	60 %	60 %	61 %
Permanent	57	45	53	47	73	82
Temporary	23	34	29	22	10	3
Hard to say	20	21	18	32	17	15
Totals	100	100	100	100	100	100

The two high volume markets of Sydney and Melbourne are more likely to have a belief that the situation is temporary.

There is a high correlation between believing the water restrictions don't go far enough and believing that the water restrictions are going to be permanent.

Permanent	%
The restrictions don't go far enough	87
Self Expressionists	67
Income less than \$40,000	67
Time Poor	66

Those on lower incomes are more likely to think that the water restrictions will be permanent; upper income people are below average in this belief. The poor are more likely to save water in buckets and take it to their plants.

People who believe that the restrictions are permanent [57%] are more confident about doing something to have a beautiful looking garden, given water restrictions. They are more likely to make changes. This segment is motivated.

“I believe it is going to be a permanent thing. I pulled the sprinkler system out. I want to do the right thing.”

“Permanent. Things will get worse. I can see more restrictions coming.”

“Maybe different levels winter or summer. The levels may vary but it is permanent.”

“Permanent the way the population is growing.”

“Permanent. As a child it used to rain all the time. All through the summer holidays.”

“I think it will be permanent the growth of the Gold Coast is so large. The catchment area is not big enough.”

Those who think the restrictions are temporary [23%] are less likely to have strategies to actively prepare their garden for the water restrictions. This segment prefers to do nothing.

“I don’t think they will always be here. Public pressure will force change when the dams are full.”

“User pays is the way these days.”

“Temporary. It all goes in cycles. El nino and all that stuff.”

6.3 BEHAVIOUR CHANGE

This section looks at the changes people have made to their gardening behaviour since the water restrictions were introduced.

6.3.1 How people define their garden

The type of garden is both a challenge and an opportunity for the Nursery Industry.

Table 19: TYPES OF GARDENS			
<i>“Which one of these best describes your garden?”</i>			
Base= 421	Established-maintenance		Newly established
	Low	High	
	%	%	%
Total	66	18	16
Adelaide	75	18	7
Brisbane	67	10	23
Perth	64	21	15
Sydney	66	18	16
Melbourne	64	18	18

High maintenance gardens are usually well established and people are looking for solutions that maintain the colour and beauty of their approach. They are reluctant to change theme from say a country garden to a succulent garden. What they want is to make adjustments that will assist water efficiency.

People still establishing their garden are a key target for the nursery industry as they are more open to new suggestions.

6.3.2 42% plan to make changes to their garden

Respondents were asked about plans they currently had for changing their garden: The question was asked early in the questionnaire before the focus turned to water restrictions.

Table 20: 42% have plans	
<i>“Do you have any plans to make changes to your garden?”</i>	
	%
Base=421	
Yes	42
No	56
Don't know/ Can't say	2
Total	100

Just over four out of ten planned some changes. **The level of involvement in change is directly related to either the perceived need or the level of restriction.** That is the more restrictive the system the greater the likelihood people will plan to make changes.

In Brisbane where restrictions have been around for a long time, and are mild the planning change incidence is 30%. In Perth where there has been a major problem for several years the level is 56%. In Sydney where water restrictions require major change in behaviour, penalties are emphasised and there has been a recent major publicity campaign, the change intent level is close to Perth at 50%.

Table 21: PLANNED CHANGES BY CITY	
<i>“Do you have any plans to make changes to your garden?”</i>	
	%
Have plans	
Perth	56
Sydney	50
Melbourne	37
Adelaide	33
Brisbane	30

Approximately half the planned changes are in a direct response to the water restriction i.e. low maintenance solutions, rethinking their plant selection

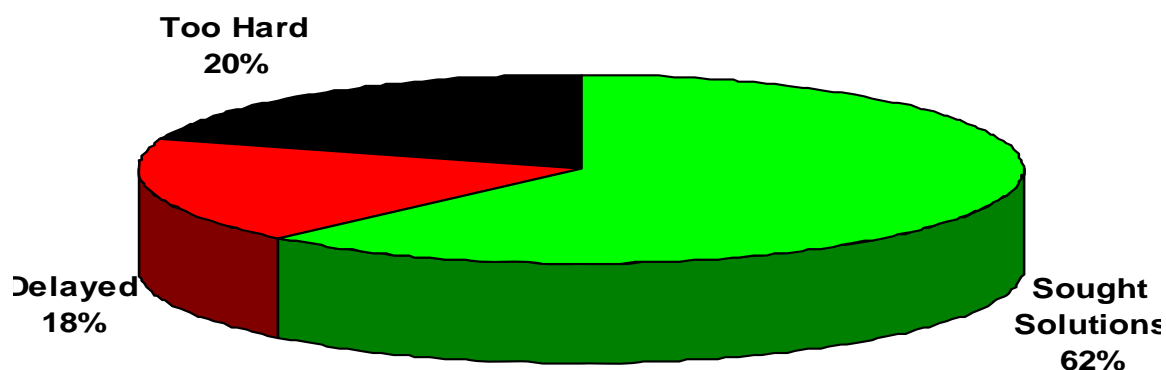
Table 22: TYPES OF CHANGES PLANNED	
<i>“In a few words what changes are you planning?”</i>	
Base = 176	
People who are planning to make changes	
	%
New landscape/ reshape/ remodelling	25
Planting new trees/ extra planting/ shrubs	25
Trying to make it lower maintenance/ native plants	18
Adding garden beds/ making more garden to reduce lawn	15
Planting some that need less water/ hardy ones	11
Paving/ rocks/ pebbles	11
Putting in drip irrigation	2
	[All in Sydney]
Putting in pool/ spa	3
Other	11
Totals	145

People with low maintenance gardens are the most likely to be planning new landscapes. High maintenance garden owners are looking at their trees and maybe using rocks and pebbles. Newly established garden owners are focussing on natives, reducing lawns and using pebbles. All three types of gardens are looking at plants that need less water.

Table 23: PLANNED CHANGES BY MAINTENANCE TYPE			
<i>“Which one of these best describes your garden?”</i>			
Base = 176	Established Maintenance		Newly
People planning changes	Low	High	Established
	91	31	44
	%	%	%
New landscape/ reshape/ remodelling	37	32	32
Planting new trees/ extra planting/ shrubs	24	29	27
Trying to make it lower maintenance/ native plants	14	16	21
Adding garden beds/ making more garden to reduce lawn	13	13	25
Paving/ rocks/ pebbles	8	13	16
Planting some that need less water/ hardy ones	12	10	9

6.3.3 Three patterns of response to water restrictions

Faced with mandatory water restrictions respondents have reacted in three basic patterns:



- **62% Seek Solutions ...** *“I’ll fight for my garden. I have spent too much time getting it to this stage.”*
- **18% Delay**
- **20% Say ‘It’s too hard’**

Respondents in the telephone study were asked about a range of responses to their water restrictions. Variation in responses between cities reflects the levels of restriction.

The totals add up to more than 100% as people may have done more than one thing e.g. sought some solutions but delayed others.

Table 24: STRATEGIES IN RESPONSE TO WATER RESTRICTIONS <i>“Which one of the following best describes you?”</i>						
	Total	Sydney	Melbourne	Brisbane	Adelaide	Perth
Base	421	120	120	60	60	61
	%	%	%	%	%	%
I have sought out solutions so that I can still have a beautiful garden	62	69	68	38	65	54
I have delayed doing anything new in my garden	23	35	23	13	22	10
Gardening is too hard so I am doing less	16	26	18	8	8	7
I want to do something but I don't know how	7	10	7	8	5	5
I have totally let my garden go	4	5	4	2	2	7
None of these	14	7	4	33	13	26
Totals	125	152	123	103	115	108

Solution Seekers represent 62% of the sample. These people want to maintain a beautiful garden even though there are restrictions. This segment is very strong in Sydney and Melbourne.

They are:

- 77% of Green Thumbs
- 72% of Self Expressionists
- 70% of New Seekers.

The segment who are causing the greatest problem for the nursery industry are the **Delayers who represent 23%**. It is important that the Nursery Industry especially in Sydney provides reassurance, solutions and ideas.

There is a segment who now perceive gardening to be too hard so they have been doing less. **This ‘Too Hard’ segment is 16%. Also a further 4% say they have let their gardens go.** It should be recalled that 17% of the total sample regard gardening as a chore. People in this segment have the least commitment to their garden.

6.3.4 Behaviour prompted by the water restrictions

In the focus groups and the national telephone survey people were asked about their behaviour that came about because of the water restrictions.

Bought mulch for your garden
Bucketed shower or bath water & used on plants
Recycled washing machine water and used on garden
Bought a soil wetting type product
Bought more native plants
Bought plants other than natives that require less water
Installed a watering system
Bought or investigated a rain water tank system
Bought more artificial plants to make the house inside look colourful

The following table shows that on average Perth and Sydney gardeners have engaged in the most activities. Brisbane and Adelaide are the least impacted cities.

Table 25: EXTENT OF ACTIVITY BY CITY

“Which of the .. SEE ABOVE.. have you done in the last 12 months because of the watering restrictions ...

	Total	Sydney	Melbourne	Brisbane	Adelaide	Perth
Base	421	120	120	60	60	61
	%	%	%	%	%	%
Total mentions	297	323	307	236	250	330
None of the above	11	9	3	20	17	15

6.3.4.1 Mulching is the number one activity

Given that only 62% seek a solution, the data suggest that almost all who sought a solution, mulched. Mulching is perceived to be economical, easy to do and largely a DIY activity. It is well promoted; there are lots of options [size, colour, aesthetics] and not too many problems. It is generally acknowledged that it needs to be replenished each year. Gardeners in each group enthusiastically exchanged experiences of the relative merits of lucerne versus sugar cane mulch versus tea tree etc.

Table 26: INCIDENCE OF MULCHING BY CITY						
<i>“Which of the following have you done in the last 12 months because of the watering restrictions ...”</i>						
	Total	Sydney	Melbourne	Brisbane	Adelaide	Perth
Base	421	120	120	60	60	61
	%	%	%	%	%	%
Used more mulch around garden	63	65	73	52	52	64

The clusters mulching most are:

- 76% New Seekers**
- 76% Self Expressionists**
- 71% Green Thumbs**

While 73% of people who love gardening mulched and 67% of those who enjoy gardening, the message has penetrated across all segments. Even 43% of people who think gardening is a chore, mulched.

“Just converted the front garden and added mulch because of the water restrictions. It was a few days work.”

“Mulch ... very economical. Get it from Bunnings it is the cheapest. ... it breaks down”

“I bought another type and it sprouted up. So I went to sugarcane mulch. The other was lucerne and it drove me mad. It was a waste of time!”

“I immediately went out and put down mulch about a foot thick. My garden looks great.”



“We’ve mulched heaps. We’ve bought our own mulcher.”

“I went with Tea Tree because it doesn’t encourage cockroaches [Gold Coast]”

“We buy our mulch by the truckload [Gold Coast].”

“I got heaps of bags of bark from Bunnings. Looks better. Better to get the bigger chips they look chunky. ...I was told they create spiders in the bark.”

“Put the mulch in and now I don’t need to water as much.”

“The council has its own. We get trailer loads”

“I like the aesthetics of the red one”

“I bought a mulching mower. Tops [Melbourne]. So my grass is always clean and it saves time.”

“The mulch is the biggest thing I can do.”

“I have put a lot of my plants in pots so I am not wasting water. Now all in a small concentrated area. It’s like feeding a baby. It is gentle. Rain saving crystals, They are good but expensive. Mulch ...that thick ... How do you get it not going onto your driveways?”

With mulching people can easily relate to the value. They see the results and believe that they are saving money and water. Also they like the added benefits of weed control.

Having established the mulching behaviour it will be important that the Nursery industry encourages re-mulching on a regular basis.

6.3.4.2 Planted hardy plants

Table 27: USE OF HARDY PLANTS						
<i>“Which of the following have you done in the last 12 months because of the watering restrictions ...”</i>						
	Total	Sydney	Melbourne	Brisbane	Adelaide	Perth
Base	421	120	120	60	60	61
	%	%	%	%	%	%
Planted plants other than natives that require less water	38	34	43	35	23	51
Planted more native plants	29	30	28	25	28	33

Gardeners have been seeking plants that require less water. Perth people, who responded to restrictions initially by delaying buying plants, show the highest incidence (51%) of planting water miser plants. Some Garden Centres there offer 1, 2, 3 Drop plants Melbourne was the other major market with 43% planting plants other than natives that require less water.

There is a strong belief in the community that Palms and Native Plants are more drought tolerant and hardy.

Planting natives is popular across all markets –strongest in Perth 33% and weakest in Brisbane 25%

“I have planted more Native Palms and Australian Natives [Gold Coast].”

“I’ve replaced many with hardier plants. [Gold Coast]”

“Mostly natives. Not a lot of maintenance. Some pruning. Trying to keep going with the water restrictions.”

“I have rearranged my garden. Put the flowers all in the one area. [Gold Coast]”

“Succulents ... They don’t need watering”

“My garden needs to be watered at least once a week. Try to buy plants that don’t need much watering.”

“My roses need watering once a week. My natives don’t need watering.”

There is a major role for garden centres to address the information needs of people who are establishing their gardens and seeking out knowledgeable advice about hardy plants. (Section 6.4.6 details the very strong positive across the board response to the ‘1,2,3 Drop’ concept.)

6.3.4.3 Used a wetting agent

Table 28: USE OF SOIL WETTING TYPE PRODUCT <i>“Which of the following have you done in the last 12 months because of the watering restrictions ...”</i>						
	Total	Sydney	Melbourne	Brisbane	Adelaide	Perth
Base	421	120	120	60	60	61
	%	%	%	%	%	%
Used a soil wetting type product	37	43	33	17	28	62

With little publicity, and strong word of mouth, soil wetting agents came in third [37%] after mulching and hardy plants. 62% of the Perth people bought soil wetting agents.

“Wettasoil granules ... great, don’t use as much water, I also use a lot of mulch. The plants don’t need as much watering. ... got a sample from the Waterboard. It was so expensive”

“Wettasoil is really good. Hardly have to water at all. I learnt about it from Burke’s Backyard.”

“I now put more plants in pots with the crystals. I’ve found that really works”

6.3.4.4 Water recycling

Table 29: INCIDENCE OF WATER RECYCLING						
<i>“Which of the following have you done in the last 12 months because of the watering restrictions ...”</i>						
	Total	Sydney	Melbourne	Brisbane	Adelaide	Perth
Base	421	120	120	60	60	61
	%	%	%	%	%	%
Bucketed bath and shower water to use on garden	33	41	40	15	25	31
Recycled washing machine water to use on garden	28	37	33	20	18	20

Bucketing shower water was the fourth most, and recycling from the washing machine the sixth most, common activity.

In Sydney [41%] and Melbourne [40%] people saved indoor water and used it on their gardens.

Many people see grey water as a major source of wasted water from their household. Women talked about washing machines and the engineering orientated male talked about diverting valves.

“Put it on the down pipes, save it into a drum and run the hose out on the yard. 1.5 in plastic pipe gets the second rise onto the yard.”

“At one stage I bucketed water from the washing machine. I was being careful with water, but I don’t always have the time. You have to be there when the washing machine is ready.”

“Lots of things we should do to minimise waste. I divert the grey water from my laundry. Put in a small water storage tank.”

“At the moment I am leaving it the way it is. I have mulched and I recycle the water from my washing machine. I save in the bucket. I don’t want to lose my plants. It is so dry. The day of watering are Wed, Friday Sunday 4pm-7am. [Gold Coast].”

“Green water from the washing machine we pour on the garden or the car.”

“I get 2.5 litres from the shower and water from the washing machine. I save, save, save. [Gold Coast].

“I am bucketing my laundry water but I don’t think I am allowed to .The gardenias love it.” [Gold Coast]

“Use bath water and from the washing machine. Bucket in the sink and put on the garden. [Gold Coast]”

“Flowers in the front, chili, mango in the back. They need to be watered often [Indian lady Sydney]. I am not watering by the hose, I wash vegetables into the bucket.”

However this is not for everyone.

“I think it’s all a bit hard. ... You won’t see me bucketing water all the way through the house from the shower which is what I’d have to do to get to the garden!”

There was isolated spontaneous mention of specialist irrigation shops in Sydney.

“Valve for diverting water ... It has to be going downhill. Sydney Water says anything like this should go to the sub soil. I had to go to a specialist irrigation shop.”

“I wanted to find a specialist shop, couldn’t and didn’t get much help from the hardware or garden centre staff”

6.3.4.5 Lawn replacement or reduction

Perth recorded the highest incidence of lawn reduction/replacement.

Table 30: INCIDENCE OF LAWN EDUCATION/REPLACEMENT

“Which of the following have you done in the last 12 months because of the watering restrictions ...”

	Total	Sydney	Melbourne	Brisbane	Adelaide	Perth
Base	421	120	120	60	60	61
	%	%	%	%	%	%
Replaced or reduced the amount of lawn	21	22	20	15	18	30

In the qualitative sessions discussion focussed on the concept of a DIFM mulching service, a component of which could be replacement of lawn with beds and mulch. Parents with young children love their lawns as a safe environment for their growing children. They are extremely reluctant to give up any part of their lawn:

“We’ve got kids –Oh No.”

“They rip up your lawn? What’s the point of that! It’s just a commercial thing.”

“I have kids I could not live without my lawn”

“Lawns are important for the dogs”

“No. Lawn is important to my children; it keeps the kids off the street.”

“No. I have it for the kids. They like to run around, no dust.”

“My 3 year old son. That’s his main zone.”

6.3.4.7 Installed or investigated a Water Tank

The question on water tanks looks at the opportunity not just the behaviour. People were asked about installation or investigation. While it is a weaker measure it gives an indication of the potential. Melbourne [26%] is the strongest market for water tank systems. Perth [10%] is the weakest because of the relatively high penetration of bores.

Table 31: WATER TANK INSTALLATION/INVESTIGATION

“Which of the following have you done in the last 12 months because of the watering restrictions ...”

	Total	Sydney	Melbourne	Brisbane	Adelaide	Perth
Base	421	120	120	60	60	61
	%	%	%	%	%	%
Installed or investigated a rain water tank system	20	26	22	17	22	10

Part of the consciousness raising is to look anew at rain water tanks. People like that it makes the household independent and self reliant. The major inhibitors are for men price and for women, the aesthetic – they are perceived to look ugly. Men worry about size of tank and women about where to locate it.

“Love to have a water tank. But it is the cost. I am aware there are rebates.”

“They are ugly. You need a big one. Now there is a rectangular flat one.”

“It’s a very large tank. To collect the run off. It is huge. We couldn’t put it near the house. I use it to water our large lawn”

“I went to Bunnings the other day and there must have been 50 rain tanks out in front. They were really pushing them [Melbourne].”

“No they are still ugly! [Female Melbourne]

“And you have to get a plumber. It’s not cheap.”

“We want to put in a water tank and a recycling the water system. Only thing stopping us is price”

“We have to first redo the guttering.”

6.3.4.8 Bore/Spear Pump

Although not asked specifically in this battery of activities in response to water restrictions, elsewhere in the questionnaire 26% of people in Perth volunteered that they had installed a bore.

The qualitative feedback in Perth and The Gold Coast indicated that bores become a more viable option when there is the combination of water restrictions and a drought

“Our bore covers all the gardens and the lawn. [Perth]”

“Bought a AAA rating shower head and put in a bore.”

“I have put a spear pump in I have had to change my ways. Wash the car not every week more every two months.” [Gold Coast].

“I am thinking of putting a bore in if it gets too bad. [Melb].”

“Dob in a neighbour. I saw a woman watering her lawn. But she could have had a spear pump. Lots of people have had their spear pump stolen. We’re just getting ours”

“I’ll put in a bore if we go to stage 3.”

6.4 IDENTIFYING THE NURSERY INDUSTRY AS WATERWISE

6.4.1 The Waterwise Marque elicits strong reactions

Waterwise is a term already used in gardeners' parlance associated with water restrictions.

“Initially my garden was all palms which was not good water wise. A couple of years ago I realized we needed to be smarter, not waste water. Don't water the lawns they'll grow back as soon as it rains”

“I have a cottage garden, a very water wise garden”

When it is mentioned people easily integrate the generic term into their natural language.

The moderator used A4 photos to introduce a series of products, services and materials, all under the Waterwise name and livery, already in place in Western Australia..

The overall reaction is very positive. Waterwise is a powerful communicator, it:

- Is simple
- Is easy to remember
- Is easy to recall
- Strokes the purchaser
- Is focused and understandable
- Has pleasing colour connotations
- Has a strong implied benefit

“Great idea ... Excellent idea, like with the heart foundation you seek them out, Very good idea; Absolutely, more efficient. Like the concept.”

“Waterwise brand – Blue ... Excellent. Easy to understand. The colour is reassuring. Is this the only brand I would be able to buy? While I still have a choice. You trust it. It's endorsing these products. It makes life easier.”

“It's all about educating us. I am sure people will use it. Great idea.”

There was some concern about the credibility and the ability to buy qualifications based on the heart tick.

“Is it just a warm and fuzzy feeling? It needs proven credibility. e.g. Government department versus very easy to get. People can pay to get these ticks.”

Overall reactions to the total package tested in the focus groups suggests this is a very strong concept.



Respondents in the telephone survey were asked a preference from several descriptors. 70% chose the word waterwise. A visual tick is stronger than the word “approved”.

Table 32: PREFERRED DESCRIPTOR	
<i>“If there was a scheme that clearly identified and approved products and services that would help you reduce garden water use but still have a lovely garden, which words do you think best describe it?”</i>	
Base=421	%
Waterwise with a tick	44
Waterwise approved	26
Smart-Water Approved	17
Aquatick	6
Smart-Water Mark	6
Don't know	1
Total	100

6.4.2 32% would visit a model waterwise garden

Group discussion respondents were asked their reactions to the concept of a model waterwise garden in their local area, with people to advise and with printed information.

“I would love actually seeing it working. Yes it’s educational.”

“They have good exhibitions at the Easter show. Make it easily accessible.”

“If it wasn’t too far I would go and check out. It could benefit me too.”

“They’d show you how to do it. That would be excellent. Show which plants. Solar house and a water efficient garden”

“You could see, talk to people, take note of how it is set out. And I could take home information to read at my leisure.”

“Seeing is believing.”

In the telephone survey response was as follows.

Table 33: INTEREST IN MODEL DISPLAY	
<i>“If the Nursery Industry, your local water supplier and the council had a display in a park, during this summer of products, plants and services that would assist you to have a good looking garden and stay within the water restrictions would you ...?”</i>	
Base=421	%
Definitely visit	32
Probably visit	45
May visit, not sure	9
Probably would not visit	7
Definitely would not visit	2
Don’t know/ Hard to say	0
Total	100
Score	3.96

There was strong support for establishing model water wise displays within the community. While 32% indicated they would definitely visit the display, the strongest support came from Green Thumbs [50%], 43% of those with high maintenance gardens, 44% of garden centre patrons, 60% of people who love gardening. On this type of measure we recommend paying attention only to the ‘definitely visit’ people.

6.4.3 Internet Service ...Waterwise.dom.au

Table 34: INTEREST IN WATERWISE WEBSITE

“I would like to get your reactions to some services that have been introduced in other states. Please tell me how interested you are ... 5 is very interested: 0 is not interested at all”

Base =421	Score	No Interest %	High Interest %
You go to a website type in your suburb, soil type and garden type and it will provide suggestions to assist you to manage your garden in terms of water and plant selection	3.08	16	33

In the telephone survey this, of all the services examined, generated the broadest interest.. The qualitative responses were also positive.

It is emotionally neutral and non invasive compared to some other of the test services which required peoples' gardens to be put under the microscope.

“It is less confronting, less threatening than someone saying you’ve done this wrong.”

“So civilized. So good. Rather than someone saying “what do you think you’re doing. It’s non threatening. There is no confrontation”

The promise of new ideas:

“They might give me some good plants to put in. Ones I haven’t heard of. Or tell me I put a plant in the wrong place.”

“Good idea. User friendly. Just gives you some suggestions. You don’t feel obligated.. No one pestering you.”

“Particularly if you could get to your particular locality.”

It appeals to the time poor.

“You can do it at your own leisure”

“What garden centre is open at 10pm which is when I’m likely to be wanting to find these things out”

The moderator asked for peoples' reactions to having the site also suggest where one could buy items and plants. Basically, potential users were quite happy for this commercialization:

“OK have to have supplier suggestions. You can relate to that because you have put in your postcode and it’s your choice whether you use them.”

“I don’t mind indicating where relevant nurseries are. Makes it so much easier.”

A segment still requires/prefers face to face interaction:

“I prefer someone to come out and say you have that plant and that plant.”

“No I would prefer to go to my local waterwise nursery”

“I liked seeing all the things the Nursery industry is doing. Wonderful ideas.”

“We had some changes done professionally. I knew what I wanted but I couldn’t seek how to get there.”

6.4.4. Reactions to the Waterwise Garden Section

There was a very strong positive reaction to seeing a section dedicated to water wise plants in a garden centre. It taps into a perceived need. Even people who had problems with the range on offer became involved in the concept.

While people know they go to their garden centre with a particular objective in mind that often relates to their preferred type of style of plant or trees, they are appreciative that a retailer would cluster together product with a water wise benefit.



“Waterwise – to become more, careful, controlled, smart, not wasting water. Like when you brush your teeth. Industry aren’t waterwise.”

“Easy to identify. Gives you more ideas. Opens your mind. You’re saving water with those plants.”

“Very good idea. You want everything in one area. You buy a plant and you don’t want it to die two weeks later. The blue is a very nice colour.”

“Very simple. I am curious about what sort of varieties?”

“Great idea, educate people, provide assistance. “

“It’s re education. We get set in our ways about what we are doing”

“Fabulous idea. Love the tank. I think everyone should have a tank”

“Very good idea. You can see the plants you need.”

“A lot of the nurseries do clump the plants together but they don’t advertise or ticket it as such.”

Negative reactions to the display highlight a key issue with which the Industry has to contend. A significant proportion of gardeners dislike succulents and some native plants. They subscribe to the need for hardy plants but do not want to forego colour in their garden.

“It would give you ideas of what you can do. Ideal if you were a lazy gardener. I personally can’t stand succulents.”

“It would be boring in variety and lacks choice. It is poorly presented. But you’d know the plants would last.”

“Great idea. We all have to start thinking about it. Mind you I don’t like cactus.”

“Excellent idea. All there in one hit. You are assured you’ve bought the right plants. I didn’t want to change my plants but I have. I want a pretty, cottage garden. I don’t like the natives. I am happy with rich deep fresh. Its fresh clean, not dirty or dusty. After you’ve watered it looks refreshed. I now miss that. Those plants look sad. It’s depressing. It’s like the bush, the desert.”

“We’ve got to have colour in this world, it can’t just be natives.”

Others remained committed to their favourite plants.

“I think I want a magnolia. I don’t think I want a water saving plant. I buy the magnolia because it is beautiful. You can’t go without all pleasures for the sake of water! I would probably modify my behaviour not change my behaviour. I’ll buy my magnolia and mulch it well.”

This area is perceived as being excellent for people establishing their garden. This is an important, long term segment for the nursery industry.

“It’s really good for people starting out.”

The results indicate that the key message the industry should be communicating is its support for the water wise gardener.

6.4.5 Reactions to a POS example



This point of sale approach generated a very strong positive response amongst group respondents and went some way to addressing the perceptions that hardy plants are not interesting plants

“I would love to have the colour and live under the restriction.”

“I want it. It’s pretty. I like the colour.”

“That is fantastic; I have two screaming kids in tow. I won’t read a brochure, It is quick and easy.”

“It grabs your attention. I wouldn’t know whether they are or not.” That’s one for me. I have kangaroo paws.”

People particularly like the sign:

“Like the sign I don’t drink much water. That appeals to me.”

“I like the humour.”

“I like it ‘Don’t drink much ... Has plants with droplets.”

6.4.6 The '1-2-3 drops' concept generates strong interest

The concept that generated the greatest recall, cut-through, enthusiasm and involvement was the 1-2-3 Drop clustering of plants at the retailer. The water drop logo was a strong component of the overall appeal.



“It’s a great idea as a time saver.”

“Efficiency rating, excellent. You still want the garden to look the way you want but that gives you some options.”

“They would sell more especially on the Gold Coast if they had areas like that.”

“Be good for schools. It’s our very survival [Perth]”

“Fantastic, they should have them in every nursery, every Bunnings. When I go to buy a plant I want to know without water it will do OK.”

“I like the idea of water wise plants [word used naturally]”

“I’ll be looking for that 1 tear 2 tear plant.” [Visual aspect]

“Fantastic ... the research is already done for you. Where do you get it? [Brisbane]”

“I would look for the sign with 1 drop, 2 drop”.

The product benefits are communicated very effectively as evident in the spontaneous reactions of people in the groups.

Water saving:

“I feel I am guilty through over watering. So I like that approach.”

“I would feel guilty taking a three drop plant”

“Very good idea. You want to save water and you can see where you can buy them”

“Great for water conservation.”

“I would interested to see it. Conserving water.”

Time saving

“We all lead busy lives. We don’t spend as much time with our children. We need those water wise things because we’re lazier and we don’t have time.”

“It will save you time”

“I am attracted to that. We don’t have the time to be maintaining the garden. So self sufficient plants save water and time. I am a lazy gardener. Saving time and effort appeals to me”

Educative:

“It’s educational. It is there in front of you. Similar system to what they use on fridges. Would there be a sticker on the pot plant?”

“That’s a way easy system”

Money Saving

“You’re going to save money because you don’t have to water them so often”

The scale is meaningful

“One means not much 3 means lots more. We’ve got to start something like that.”

“Two a little bit more – three a lot more ... For me that will work ... My plant just needs one drop.”

“ One drop means I don’t need much. I’d like 3 drops still to be good. Good, Better Best. Versus three meaning it’s terrible”

“I’d look for one drop plants.”

“Makes it easy to identify and I go for one drop first. Three means more than my garden can cope with.”

“I would tend to avoid the three drop plants. It says they will be a lot of effort.”

“Three drops means I will use three times the volume of water”

There is not universal acceptance, however

“No, it’s a money making thing.”

“If you love them you will keep buying the plants regardless of the drops.”

“It also depends on you budget.”

“I wouldn’t want to change my garden. There are 1,000 plants there. It is seven years old. It’s established.”

“People will still buy water sucking plants.”

“It’s a big ask for established gardens but for people with new gardens a great idea.”

The zone issue is more problematic

“I wouldn’t zone my plants”

“Zoning is OK. I do that already with my bucket”.

“The zones make perfect sense.”

Based on the experiences in Perth, the Nursery Industry needs to interact with their customer base. The following questions were asked to determine how best to do this.

Table 35: INTEREST IN SEEKING OUT 1-2-3 DROP DISPLAY	
<i>“In some Nurseries there are now displays of 1, 2 and 3 drop plants. A three drop plant drought tolerant but requires more water than 2 or 1 drop plants. A one drop plant is miser that requires very little water to be grown easily and successfully. What do you think idea of communicating the plants water needs as 1, 2 and 3 drops. Would you ... ?”</i>	
Base=421	%
Definitely seek out such a display at a Garden Centre	58
Might seek out	24
Hard to say	6
Probably would not	8
Definitely would not	5
Don’t know	2
Total	100
Score	4.24

Given that the level of people seeking a solution is around 62%, a 58% definitely seek out such a display shows a very high level of interest in this concept.

Those most interested were New Seekers [71%], Melburnians [67%], high maintenance garden owners[65%] and owners of newly established gardens [65%], people planning changes 64%, garden centre shoppers [64%], people who believe the restrictions don’t go far enough [65%], people aged 35-55 [66%] and people who have lived in their house for less than 3 years.

6.4.7 Reactions to an information booth



Respondents were shown a photo of a Waterwise information booth. There was a not unexpected dichotomy – those who seek out information welcome it in all forms. There are many people who acknowledge a lack of interest in reading- for whom this stand has minimal interest. The strength is that the information can be localized.

New Seekers express particular interest:

“Like the idea especially when starting a garden”

“We’ve got to do something now. Very helpful for someone like me who is doing a new garden.”

“Great idea. Wish they had that when we started. We’re in Rockingham and had no idea of what to buy. We were just guessing and taking on trust what we were told.”

“It’s a good starting point”

“I wouldn’t take one I don’t read a lot. Usually have my hands full with kids.”

“I always ask for advice.”

“Great. I am not confident so I like that. I like to read about this because I don’t know what is best.”

“All the works done for you. In Brisbane the Nurseries sell plants from down south that are no good like fuchsias.”

“I think it should come from the Government “Not from the Nursery industry”

“The Nursery because I am usually there and would like to pick it up there.”

“Like the information- its very specific on clay gardens, sandy gardens etc.” [Gold Coast]

“Gives you more information. You can make a better, more conscious decision. Better for people who are just starting up.”

6.4.8 Reactions to a product display



Respondents were shown a picture of the Western Australia merchandise display and asked for their reactions:

“I might find something that would help me. You can actually see the products all in one place. Grabs your attention.”

“I like it. Right that’s water wise”

“Would be better for our dry conditions” [Gold Coast]

“I’d look at the display and then do price comparisons with other brands.”

“I would like to see other brands to compare. It implies these are the best waterwise products.”

“Should be endorsed by the council [Gold Coast]. “

“If I was establishing my garden. Definitely”

“Yates ... Stands out, very good.”

There was some concern about choice, price and competition. However people overall liked the idea. This works well for the Time Poor.

6.4.9 Reactions to Waterwise accreditation

Qualitative reactions indicate a mixed perception of the importance of accreditation. As stimulus for discussion people were shown a photo featuring the general and the Waterwise accreditation logos. Portrayed in this context the reaction was that the actual logos and signage lacked impact.

The following comments convey the range of reactions



“Anything that’s waterwise is a good idea. I would expect that they would be waterwise in watering their plants. Brings a different awareness. Says these people walk the talk. Prefer to go there for advice. Expect they wouldn’t sell plants that used a lot of water.”

“You feel more comfortable. You know you can trust their advice. They’re experts.”

“Says they have had the training.”

“I know I could then find a trained horticulturist

“It says these people are aware and want to educate us.”

“I’d think if it is waterwise I can get some good information”

“I’d rather go there and buy rather than go to Bunnings”

It means higher standards. It shows they have got to a higher standard.”

“They have been educated, so they can educate me. They can give me the information I want”

The accreditation improves some perceptions but convenience remains a strong attractor.

“I would only travel the extra distance if I really did need the advice.” I would go 5 km but probably not more.”

“It wouldn’t massively sway me. I wouldn’t travel extra distance. I don’t find the accreditation very convincing.”

Many respondents thought that garden centres are having difficulty surviving since the water restrictions

“They all will have to be accredited otherwise they’ll be out of business”

There is no doubt the quantitative reactions to waterwise reflect a “motherhood” halo. Once people spend time thinking through the practicalities such as distance to travel as in the groups they will trade ideal for practical .

None the less, the scores below are strong compared with those in the 2001 when respondents were asked *“How important is it to you that a garden centre is accredited?”* –only 13% said very important and 29% quite important.

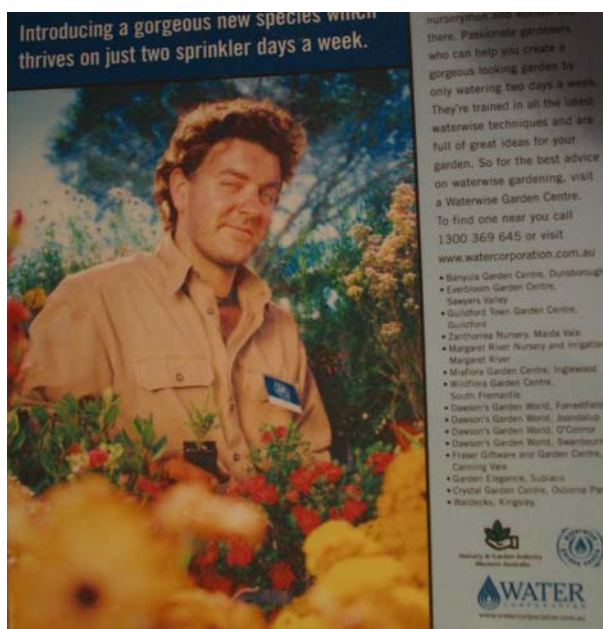
Table 36: PERCEIVED IMPORTANCE OF WATERWISE ACCREDITATION						
<i>“How important is it to you that a nursery/garden centre is waterwise accredited. That is, has a display of plants that need less water, information available for you on garden watering and its staff have been trained to advice on water efficiency in gardens in your area?”</i>						
	Total	Sydney	Melbourne	Brisbane	Adelaide	Perth
Base	421	120	120	60	60	61
	%	%	%	%	%	%
Very Important	49	40	59	53	43	48
Quite important	39	48	33	28	43	38
Not very important	9	8	8	10	8	12
Not at all important	3	4	0	8	3	2
Total	100	100	100	100	100	100
Score	4.29	4.11	4.44	4.08	4.17	4.20

	Score
New Seekers	4.61
Self Expressionists	4.44
Bargain Hunters	4.33
Cut Flowers	4.27
Green Thumbs	4.12
Not confident loyals	3.98
Time Poor	3.37

6.4.10 Reactions to a Waterwise Print Advertisement

The reactions to this newspaper advertisement highlight the importance, that when in strategic partnerships, the industry has control over the creative execution of its message.

In the hot-house environment of the focus group people appreciated the information once focused on the message i.e. the location of the accredited nurseries.



However all elements in the creative were wrong:

“I wouldn’t stop to look at that”

“You need to capture my attention. He doesn’t”

The reaction to the talent was a major turnoff.

“The picture’s not right. There is a man with a sleazy look on his face. It doesn’t depict what you are trying to communicate.” “He’s the wrong guy.”

Many people today are reluctant to read relatively long copy.

“It’s too long winded.”

People focused on the logos:

“Would not capture my attention It doesn’t communicate the benefit. The waterwise logo is too small. Looks boring.”

6.5 COMMUNICATION OPPORTUNITIES

6.5.1 Perceptions of the nursery industry as a stakeholder

Currently gardeners focus on their water supplier as the primary instigator, the authority and spokesperson about water restrictions. However when asked *“If you wanted to get advice about how to save water in you garden, where would you go”* of the options listed below the garden industry has considerable salience, particularly garden centres.

Table 37: EXPECTED SOURCE OF ADVICE						
<i>“If you wanted to get advice about how to save water in you garden, where would you go”</i>						
	Total	Sydney	Melbourne	Brisbane	Adelaide	Perth
Base	421	120	120	60	60	61
	%	%	%	%	%	%
Garden Industry						
GC/Nursery	52	60	52	37	43	59
Hardware store	24	24	28	17	22	23
Garden watering specialist	23	29	17	10	25	36
DDS	4	6	3	0	2	5
Sub total	103	119	100	64	92	123
Water supplier						
Water supplier	45	48	58	12	33	57
Media						
Media	29	43	23	20	17	34
Internet	25	37	21	8	27	25
Television	17	29	9	8	22	12
Radio						
Sub total	71	109	53	36	66	71
Don't know	8	4	5	23	10	7
Totals	226	280	215	135	200	257

While the nursery industry is perceived to be a natural source of useful, practical and helpful information, qualitative feedback indicates retailers are currently not seen as being proactive in helping gardeners to adjust to the water restrictions.

People see the Nursery industry on the one hand as suffering, having difficulty surviving and badly impacted by the water restrictions. On the other it is perceived to be credible, authoritative and involved. Its association with the waterwise concepts already detailed is a natural fit

“It would be good to go into a nursery and see in one area, well presented plants you could buy that don’t require much water.”

“Usually it’s succulents and natives. Sometimes you want something else.”

“I wouldn’t mind seeing something on a label with a tick like the heart tick”

“Is this information or are they trying to sell me something. Still if it’s in a nursery I would believe it.”

“Information stand is perfect, excellent, good idea. If you are into your garden the more the better. It’s getting you at where you are.”

“Guides ... I’d read them all. Pick them up at my local nursery”

“My water providers. Yarra Valley. Yarra Valley wants you to use more water. The council. State Government, Local government. The people who deal with the water at the coal face.”

Garden centres as distinct from the big box retailers, are seen as the authoritative, knowledgeable and helpful face of the nursery industry., despite the reality that many now shop at the big box retailers..

“You need the right information. Bunnings is useless.”

“Bunnings I have to help myself, in the nursery I get helped.”

“Bunnings couldn’t do this [seminars]. They lack credibility. The majority of the staff I wouldn’t run over “.... “The older people in their gardening section are Very Good.”

“Very good. Educating you, Simple. Readable. I would believe it in a reputable nursery like Boyd’s Bay but not in Bunnings”

This is a perception. Bunnings could do the models, seminars and workshops well because of their strong customer base.

6.5.2 Preferred media options to reach consumers

Asked about preferred media communication from the Nursery industry, gardeners elected the following. Of these, four [Letterbox, Displays, Garden Shows, The web] are easily achieved by the industry at reasonable costs.

Table 38: PREFERRED MEDIA BY KEY SEGMENTS <i>“If the nursery industry wanted to communicate useful information about how to have a good looking garden, but stay within the water restrictions, how would you prefer to get that information by ...?”</i>					
	Total	High Maintena nce	Plan Change	Shop GC	Solution seekers
Base	421	74	176	135	259
	%	%	%	%	%
Letterbox leaflet / catalogue	65	70	67	65	67
Display in-store at GC	58	58	64	64	61
TV	44	51	48	46	47
Garden show or festival	35	41	41	41	39
The web	31	30	40	32	35
Newspaper	30	31	36	29	34
Radio	28	31	30	32	31
Other	2	1	0	0	1
None of these	1	0	2	3	3
Total	293	314	327	311	318

6.5.3 Reactions to a garden centre workshop

In the focus groups respondents were asked for their reaction to an invitation from their preferred nursery retail outlet to attend a seminar on having a beautiful garden under the water restrictions.

A key focus for many people is their time availability

“I’d like to get a video.” [Time Poor]

“If I had the time I might go”

“As long as they have a varied time schedule”

“I would make time to find out how to do it right.”

“We expect the nurseries to educate us. They actually run things like a workshop on water conservation. They invited me at the check out. I was interested but I couldn’t get at that time”

Educational helpful, learn a lot, free samples. [Perth]”

Many expressed a preference that the nursery work in conjunction with partners.:

“Be good to see what is available. More inclined if it was from the council” [Bris].

“I would definitely go because I am aware of the environment. Prefer if it was a joint initiative of the government and the nurseries.”

“I don’t mind Yates being part of it. It’s just the way the world works”

“Like to see it in a local shopping centre] Wouldn’t matter to me if there were Yates people there or irrigation people there.”

“Council people would give it credibility” Everyone knows here you have to do what the council tell you” [Gold Coast]

Table 39: INTEREST IN ATTENDING GARDEN CENTRE WORKSHOP

“If your preferred Garden Centre invited you to attend a workshop at a convenient time that was about plants and services that would assist you to have a good looking garden and stay within the water restrictions would you ...?”

Base=421	%
Definitely attend	18
Probably attend	30
May, not sure	24
Probably would not attend	20
Definitely would not attend	8
Don't know /hard to say	0
Total	100
Score	3.30

It is most popular with The Green Thumbs [27%], Self Expressionists 23% and the New Seekers 22%, people in Perth 23% [where it has been successful], people with high maintenance gardens 27%, people who think the current situation is 'too restrictive' 28% and 'not restrictive enough' 30%, people who love gardening 30%, .

6.6 SERVICES

This section looks at reactions to possible new services to ensure people remain connected to and interested in their garden (and visiting garden centres) in the current climate of water restrictions.

6.6.1 One Stop Grey Water Shop

Table 40: INTEREST IN GREY WATER ONE STOP SHOP

“I would like to get your reactions to some services that have been introduced in other states. Please tell me how interested you are ... 5 is very interested: 0 is not interested at all”

Base =421	Score	No Interest %	High Interest %
A one stop grey water recycling service where all the latest designs and equipment are in one place to provide advice or installation	3.07	11	25

In the focus groups there was a great deal of talk about and involvement with the idea of capturing grey water.

“Excellent ... I heard they didn’t allow it years ago for hygienic reason- mould, lots of bacteria I’ve read about that. I would believe a place like that. That’s good it is such a waste.. It is not a difficult process.

“I would do the grey water. You feel guilty about all the water that goes down the drain.”

However some people express some concerns. Many are not too sure about ‘grey water’:

“Grey water you think of something dirty.”

“No. It’s against the regulations to use grey water in NSW.”

“Grey water is a problem in Brisbane. It can get quite smelly. Not a nice smell great for the garden but not for the neighbours. It only kicks in once it is full.”

‘Grey water I am skeptical- I would not put it on my vegetables,. I don’t want to consume what I am putting down the drain. Nor having my kids doing cartwheels on it.’

There were cynical responses:

“No these things are all cyclical in a couple of years we’ll all have floods and too much water.”

“Now on a block there is are or three houses. They calculated 30 years ago on different assumptions”

The majority used the term grey water comfortably. However it is not universally understood.

“What do they mean by grey water.”

People liked the options – DIY and DIFM:

“I think my husband would muck it up. I just don’t want to go there. I would like to get it done professionally.”

“Don’t like that you have to have a licensed person. Prefer to do it myself. For a small job, with tools we have now a days even if we do it as rough as, its fine to DIY.”

“We stopped because it was illegal in the shire [Perth].”

“Instead of having a bore. [There is some concern about the Perth aquifers] Would you use the same washing powder? [Perth]”

There are some perceived benefits from grey water:

“It kills black beetles”

It has stronger appeal for people establishing a home:

“Better if you’re building a house.”

“As long as it was affordable. Should be in all brand news homes. Be good on the Gold Coast. In Brisbane we are not short of water. We need to be educated why we need to change.”

People like face to face ‘advice’.

“I like to talk to someone. As long as they are not pushy.”

“That’s good I don’t want to be ripped off.”

“Like to see that. You can integrate the whole system. That is the problem we’ve got.”

Overall there was a strong positive response to this concept.

6.6.2 Rain Water Tank One Stop Shop

Table 41: INTEREST IN RAIN WATER TANK ONE STOP SHOP

“I would like to get your reactions to some services that have been introduced in other states. Please tell me how interested you are ... 5 is very interested: 0 is not interested at all”

Base =421	Score	No Interest %	High Interest %
A one stop rain water tank service where all the latest designs and equipment are in one place to provide advice or installation	2.93	12	25

25% of the telephone sample showed high interest in a one stop rain water tank shop.

As the level of restriction becomes more severe the interest in rain water tanks will grow.

“We’re thinking about a rain tank. We’ve had prices. But you have to get all the down pipes rerouted. There’s six down pipes on our house.”

“The tank my husband wants is \$1500. He looks at it all the time.”

“I really want to get a water tank. Make me free of water, Do you think they are ugly? I would just use it for the garden.”

Aesthetics:

“You can get the coloured ones. Corrugated iron has come back in.”

“They are not as aesthetically pleasing.”

“Tap water is full of chemicals.”

“Rain water is free and convenient

The service:

“Rain Water Tank Service ... Nice to know those exist. I’d be getting more specialised information. But don’t make it compulsory. Good –it’s better than going around the corner (to the hardware store) and asking a 15 year old kid who doesn’t know what he did last night.”

6.6.3 Water Efficiency Information and Rebate

Although the quantitative results showed some level of interest in this service, in the qualitative sessions there was a great deal of distrust and discomfort about yet another authority invading one's privacy.

Table 42: INTEREST IN EFFICIENCY & REBATE SERVICE			
<i>"I would like to get your reactions to some services that have been introduced in other Please tell me how interested you are ... 5 is very interested: 0 is not interested at all"</i>			
Base =421	Score	No Interest %	High Interest %
You invite a specialist from you water provider to assess the efficiency of your garden watering system. If you get the highest rating you will have a rebate on your water bill.	2.90	18	26 (Of these 47% expect it to be free)

Those who express particular interest were asked *"How much would you pay for that service?"* 47% indicated they would expect it to be free and those prepared to pay indicated an average fee of \$63.04

While in theory people liked the idea of a rebate and in practice several had had the person from their water supplier come and look at their shower rose, this option aroused a great deal of negative, emotional response.

"I feel uncomfortable with that. It's very in your face. You feel under pressure."

The problem is that most do not trust the water authority:

"Water Board does that for your house. I made an appointment but the chap never turned up."

"With the shower rose I didn't want the one they were going to give me. It was too basic."

People worried about the fairness and the opportunity to cheat the system.

“I would want to be very sure you would not be penalised for a poor score.”

Shouldn't be compulsory. Not big bother. How big a rebate say 10 % off your water bill No I would want 20! No it would be open for abuse. We're paying why isn't it free?”

“Whats to stop you getting a good rating and a rebate and then abusing the system?”

Many felt threatened at the prospect of failure to qualify:

“No! My garden wouldn't win any awards.”

“I don't want someone seeing how inefficient I am!”

“Will they tell you you're a naughty girl and you are using too much.”

The strength is the user pays, the rebate and the outcomes

“That would be great. Like the user pays option”

“How do you get the rebate? Do they give it back or off the next bill? We like to see the cold hard cash? Harvey Norman offers \$100 rebate on a front end loader washing machines. ”

“That would be great if the incentive was high”

People worried about being given advice they did not want to hear:

“Our homes old and I am not going to put in a whole new system.”

“I'm not putting in a new toilet because there is nothing wrong with it.”

People were reluctant to pay for such a service:

“Who would pay for it? We would end up paying for it. Is that like how you have to have a pool around your fence? How often would they check?”

“How much is it going to cost? I got the Yarra Valley brochure. There were so many ways they were going to cost me money. But they were all too expensive for the average person. They say they were trying to help. As I see it they were wanting to make money!”

“We had someone from the nursery. He charges a fee but takes it off the price of plants.

“No too open to abuse and too costly to administer. How much will they charge to come out and do this? The council charges \$300 for a simple permit”.

There is a sensitivity about authorities entering private dwellings. For some there were connotations of the Water Nazi's.

“Auditing! Don't like the word audit which means you are being checked up on”

“The water board coming into my house is very invasive rather than someone telling me how to plant my garden. You feel as if you are under the microscope.”

“Don't like someone coming to my house and dictating.”

“No I know my garden better than anyone.”

“Only Sydney Water. I don't want anyone else. I don't want people who want to sell me something. Invasion of privacy and the pressure selling. I don't mind if I approach them myself. And then there is the personal security aspect.”

“It is not Gestapo type stuff?”

“I'm suspicious”.

“More Governmental, bureaucracy.”

“No. It's pressure selling.”

One preferred a Total Eden type approach:

“You can take you plan into a reticulation centre like Total Eden.”

6.6.4 Irrigation Specialist Retailer

In the telephone survey people were asked about an irrigation specialist retailer.

Table 43: INTEREST IN IRRIGATION SYSTEMS RETAILER			
<i>“I would like to get your reactions to some services that have been introduced in other Please tell me how interested you are ... 5 is very interested: 0 is not interested at all”</i>			
Base =421	Score	No Interest %	High Interest %
A retail outlet that specializes in irrigation systems with a broad range of pipes, timers and options	2.75	18	10

There is a segment who want to have control within the water restrictions so they can best, i.e. automatically, water their garden. This attitude is most evident in Perth with its combination of bores and well organized retail distribution of irrigation specialists.

In Perth people had moved from reacting to water restrictions to a more positive involvement with water management. The first idea tends to engage the Adapted Child with its worries, concerns and fears. The latter has people functioning from their Parent ego state. In this state they are more interested in control and management.

After two years people in Perth had literally adapted:

“It’s not a restriction anymore”

“We’re accustomed to it now”

“We’ve been stupid about it for years”

In Perth people use bores and reticulation more and appear to have a personal sense of ownership for the water for their gardens:

“We manage our water better now”

“I honestly don’t know how people get on without reticulation.”

Self expressionists are a segment who want to control everything. They are most in tune with and willing to pay for contemporary irrigation systems.

“I have a high maintenance garden. I like the symmetry; A landscaper did all the hard surfaces. You feel like you’re in an oasis; I love looking at the pretty things. I go across the street and look at my place. My standard and small roses all trimmed. If I lose that I will be shitty.”

“I went to specialist watering type people. A lot of the drippers were out of stock because of the demand. [Sydney]”

“I was worried I’d just moved into a house..was concerned if they cut it back 2 days will they cut it back further? So that encouraged me to get a reticulation system. I used a DIY kit.”

“Husband like being outside watering with a beer. Mostly its now all reticulated and we have things in pots.”

6.6.5 DIFM Mulching Service

Table 44: INTEREST IN DIFM MULCHING SERVICE

“I would like to get your reactions to some services that have been introduced in other Please tell me how interested you are ... 5 is very interested: 0 is not interested at all”

Base =421	Score	No Interest %	High Interest %
A mulching service, they come to your garden, work out the mulching needs, deliver and spread.	2.50	21	17

This relatively weak response, just over one in six expressed an interest, is due in part to the high levels of DIY mulching discussed elsewhere in the report.

The concept of removing lawn and introducing mulched garden beds instead met with predominantly negative reactions. This enthusiastic comment was an isolated one.

“Sign me up come and pull it out” [Gold Coast].

In the Gold Coast where lawns were cracking under foot they are beginning to rethink their lawn. However the general belief is that when the rain returns so will the lawn.

“Bark produces some kind of chemical not good for plants. You should get rid of lawn ... Yes borders, pebbles, river-stone. I would need a landscaper if I wanted to do that. Because it could look awful.”

“That’s what we’re doing. Took the lawn out.” [Gold Coast]. Saves money, pebbles don’t die.”

“I don’t like lawn. I would be happy to go to all garden. If I had \$1000 I would get it done. I don’t have children. But I don’t have the money”

“I like space, I like the lawn. I have a garden out the front. That’s enough”

“I am not going to rip out my lawn ..when they want o replace it with dust. That’s what happens with mulch. I don’t trust them.”

6.6.6 Plant selection & placement

Of all the suggested services this one was the weakest.

Table 45: INTEREST IN PLANT SELECTION & PLACEMENT SERVICE

“I would like to get your reactions to some services that have been introduced in other Please tell me how interested you are ... 5 is very interested: 0 is not interested at all”

Base =421	Score	No Interest %	High Interest %
You invite a horticulturalist to assess the efficiency of your plant selection and placement. They will make suggestions to maximise the water efficiency based on what you want from your garden.	2.42	23	13 (Of these 38% expect it to be free)

Those who did express high interest were asked : *“How much would you pay for that service?”* 38% indicated they would expect it to be free. Those prepared to pay indicated an average fee of \$74.55

As has been a recurring response amongst people with established gardens when posed with the prospect of their garden prowess being put under the microscope reactions are negative.

“They say ‘you’ve got it all wrong’”

“You’ve got the wrong soil; will just go on and on. No.”

“I wouldn’t want them coming back with a spotlight checking on me”

“I hate people coming knocking on my door”

“Unlikely you can get that for free. A colour consultant costs \$400. But the water Board costs you nothing.”

It all comes down to cost. I wouldn’t pay for it at all. You can buy a lot of plants at the markets for \$300” ...

“I’d love to have a landscape consultant but I can’t afford it”

“I wouldn’t pay a cent for something like that! Not for an established garden”

“Will they charge you based on your land size?”

“It should be a free council service”



Again, New Seekers and people still establishing their gardens are more responsive to the concept and do not display the sensitivities expressed above.

“Good for a new garden. If you have plan. Here is my house, here is my plan for a nominal fee. But if your established you’re not going to do it.”

“I’d be prepared to go to them. Give me a plant list give me some ideas.” [New Seeker]

“Any help is gratefully received seeing you learn from trial and error. That’s more beneficial.”

“You’ve got to know how to do it properly”

“You come and tell me how I can make things better. It’s more an advising service. That will work better.”

“I would love someone to come in and say this area gets a lot of sun you might think about planting X, Y or Z.”

6.7 RETAIL BEHAVIOUR

6.7.1 RETAIL BEHAVIOUR CHANGE IN SHOPPING FREQUENCY

This section covers the impact the water restrictions are having on nursery retailing. To provide a perspective this study's findings are compared with those focussing on the same questions asked in the October 2000 study.

Table 46: ANNUAL SHOPPING FREQUENCY CHANGES

“How often would you shop for plants and other gardening items at a ... garden centres or nursery, a hardware store like Mitre10, Bunnings, discount department store like Kmart, BigW, Supermarket and the markets”

	GC/Nursery		Hardware		DDS		Supermarket		Markets	
	Nov 2003	Oct 2000	Nov 2003	Oct 2000	Nov 2003	Oct 2000	Nov 2003	Oct 2000	Nov 2003	Oct 2000
Times Per Year	8	11.4	9.3	8.0	5.0	6.5	3.2	5.2	2.0	2.7
Change	-30%		+22%		-23%		-38%		-27%	

Across all major retail outlets the November 2003 estimate is that customers shopped 27.5 times per year for plants and other garden items. This is down from 33.8 times per year in Spring 2000, an overall 18.6% decline.

All segments except Hardware have been impacted. Hardware has gained because the likes of Bunnings have been expanding their number of outlets across the country.

The Garden Centre share of behaviour is down 30%.

Table 47: ANNUAL VISITS BY DISTRIBUTION CHANNEL & CITY

	Sydney	Melbourne	Brisbane	Adelaide	Perth	Total
Base	120	120	60	60	61	421
Times per year						
Hardware	7.3	9.7	8.9	13.5	9.0	9.3
Garden Centre	7.8	8.1	7.4	8.8	8.1	8.0
DDS	6.9	5.6	3.4	2.7	3.6	5.0
Supermarket	4.1	3.8	3.0	1.2	2.2	3.2
Markets	2.2	3.0	4.6	1.4	2.7	2.7
Total	28.3	30.2	27.3	27.6	25.6	25.2
Minus Hardware	21.0	20.5	18.4	14.1	16.6	15.9

Table 48: GARDEN CENTRE SHARE BY CITY

	Sydney	Melbourne	Brisbane	Adelaide	Perth	Total
Base	120	120	60	60	61	421
Times per year						
October 2001	10.1	11.9	12.0	11.9	11.6	11.5
November 2003	7.8	8.1	7.4	8.1	8.1	8.0
Difference	-2.3	-3.8	-4.6	-2.5	-2.5	-3.5

Since Spring 2000 Garden Centres have lost share of behaviour in all cities. It is likely that this is a combination of the penetration of the Hardware big boxes and change in customer shopping behaviour due to the water restrictions.

Table 49: RETAILER PENETRATION BY CITY

	Sydney	Melbourne	Brisbane	Adelaide	Perth	Total
Base	120	120	60	60	61	421
Shopped there for Plants & garden items in last 12 months	%	%	%	%	%	%
Hardware	77	86	88	88	88	84
Garden Centre	86	78	78	72	87	81
DDS	62	59	43	40	31	51
Supermarket	45	44	33	16	26	36
Markets	29	36	40	22	26	31

6.7.2 TYPE OF PRODUCT BOUGHT BY CHANNEL

Table 50: TYPE OF PRODUCT PURCHASED BY CHANNEL

'In the last 6 months, from ...[RETAIL TYPE]...have you bought ...?'

	Garden Centre	Hard ware	DDS	Super market	Markets
Base =421					
	%	%	%	%	%
Seedlings, flowering plants, veg, herbs	55	59	33	27	29
Trees & Shrubs	40	24	10	6	20
Mulch	26	22	10	3	1
Soil wetting agents	12	17	9	4	2
Sprinklers, hoses, watering can	6	36	14	13	3
Garden watering system or part of one	2	17	5	1	1
None of these	23	54	49	58	56
Total	166	188	130	112	112

Seedlings

The Garden Centre has lost slightly [in the order of 3%] market share for seedlings, flowering plants, vegetables and herbs. In the last three years Hardware has doubled its share of this category. DDS improved in this area with 33% of their customers buying [up 11%] and Supermarkets were also relatively strong at 27%. Markets attract 29%.

Trees & Shrubs

Garden Centres have lost a larger 8-9% in the trees and shrubs and Hardware has doubled its share of this category. DDS and Supermarkets have a relatively smaller share. The markets remain strong with 20%.

Mulch

The Garden Centre is the primary outlet for mulch with 26% buying in the last six months compared with 22% for Hardware. DDS did well with their mulch offering [10% of their customers]. Supermarkets attracted only 3%.

Soil wetting agents

However the balance is reversed with Wetting agents where most go to Hardware [17%] versus 12% for Garden Centres. DDS had 9% and Supermarkets 4%.

Hardware dominates for Garden Watering systems or parts of one with 17%, compared to 5% DDS, only 2% using garden centres and 1% for Supermarkets. Hardware also dominates with 36% sprinklers, hoses and watering cans; only 6% of garden centre customers buying these items there, DDS [14%] and Supermarkets 13% were also major outlets for sprinklers, hoses and watering cans;. 3% Bought these items at Markets.

25% of Garden Centre patrons and 23% of Hardware Centre patrons did not buy any of these types of plants and items. While the Nursery centres are destinations, the other outlets are a convenient way to purchase in the main plant categories of interest.

APPENDIX

7.1 Demography of Telephone Sample

	Total
Base	421
	%
Female	72
Male	28
18-24	3
25-34	12
35-44	23
45-54	36
55-65	25
Work FT	38
Work PT	27
Not Working	35
Single Young	4
Couple No Kids	10
Young Family	12
Middle Family	21
Mature Family	26
Older Couple	27
Professional	10
Admin	35
Skilled Trades	27
Unskilled trades	10
Not in Workforce	16
Own	89
Rent	9
Other	2
Years at current residence Only	
Less than 3	15
3-6 years	21
7-10 years	16
11-15 years	18
16-20 years	9
More than 20 years	20

7.2 Dwelling Structure

“How would you describe the dwelling in which you live?”

Base	421
	%
Free standing house no pool	68
Free standing house with pool	20
Terrace/Semidetached/Town House/Duplex	12
Totals	100

7.3 SEGMENTATION

7.3.1 NURSERY SEGMENTATION CLUSTERS

Creative Dialogue has developed a seven cluster segmentation of nursery buying behaviour. Respondents are asked a battery of questions which are factor analysed to produce the seven segments. The segmentation in previous studies shows that the nursery industry is dependent loyals for most of its revenue on four segments – Green Thumbs, Self Expressionists, New Seekers and Not confident Loyals. The November 2003 study indicates that with regard to water restrictions Not Confident Loyal people are the segment most impacting the loss of revenue to the industry. This sections shows how each segment loaded on each question in the segmentation battery [Refer Q19 in the questionnaire]

“I will read some statements. For each, please tell me whether you agree strongly (1), agree (2), neither agree nor disagree (3), disagree (4) or strongly disagree (5).”

Overall representation

	Cut Flowers	Bargain Hunters	Not Conf.	Self Exp.	Green Thumb	Time Poor	New Seekers	Total
Sample Size	71	101	78	114	79	78	79	600
Autumn 2001								
Spring 2000	107	106	67	110	67	41	111	609
Spring 1999	140	155	162	248	201	171	176	1253
November 2003	38	52	57	86	68	41	79	421
Autumn 2001 %	18	17	13	19	13	13	13	
Spring 2000 %	11	17	11	18	11	7	18	
Spring 1999 %	11	12	13	20	16	14	14	
November 2003	9	12	14	20	16	10	19	

Statement Loadings – The higher the number the more the segments agreed with the statement

I would prefer to buy a plant than cut flowers	Cut Flowers	Bargain Hunters	Not Conf.	Self Expr	Green Thumb	Time Poor	New Seekers	Total
Autumn 2001	1.9	4.2	3.8	4.2	4.0	4.3	4.1	3.9
Spring 2000	2.1	4.0	3.9	3.9	3.8	4.1	3.8	3.6
Spring 1999	1.8	4.3	4.2	4.3	4.2	4.3	4.1	3.9
November 2003	1.9	4.3	4.1	4.2	4.2	4.3	4.3	4.0

I am proud of my garden	Cut Flowers	Bargain Hunters	Not Conf.	Self Expr	Green Thumb	Time Poor	New Seekers	Total
Autumn 2001	3.8	2.9	3.4	4.5	4.5	3.6	4.3	3.8
Spring 2000	3.4	3.2	3.4	4.1	4.2	3.5	4.1	3.7
Spring 1999	3.4	3.1	3.4	4.5	4.7	3.5	4.5	4.0
November 2003	3.6	2.8	3.3	4.2	4.5	3.4	4.33	3.8

I often buy plants that make me feel good	Cut Flowers	Bargain Hunters	Not Conf.	Self Expr	Green Thumb	Time Poor	New Seekers	Total
Autumn 2001	3.1	3.4	2.7	3.6	3.9	2.7	4.1	3.4
Spring 2000	3.2	3.3	3.0	3.5	4.0	2.4	3.9	3.4
Spring 1999	3.3	3.6	2.9	3.7	4.2	2.4	4.2	3.5
November 2003	3.1	3.1	2.9	3.6	4.2	2.5	4.0	3.5

I have no loyalty to any plant place. I shop around.	Cut Flowers	Bargain Hunters	Not Conf.	Self Expr	Green Thumb	Time Poor	New Seekers	Total
Autumn 2001	3.4	4.1	2.2	2.8	4.2	3.5	3.8	3.4
Spring 2000	3.5	3.9	2.7	2.7	4.1	3.5	3.6	3.4
Spring 1999	3.6	4.3	2.3	2.6	4.2	3.5	3.7	3.4
November 2003	3.2	4.6	2.0	2.4	4.4	4.1	3.5	3.4

I tend to be loyal to a particular garden centre	Cut Flowers	Bargain Hunters	Not Conf.	Self Expr	Green Thumb	Time Poor	New Seekers	Total
November 2003	2.7	2.0	3.7	3.5	2.2	1.8	2.8	2.8

I often seek out new plants and gardening ideas	Cut Flowers	Bargain Hunters	Not Conf.	Self Expr	Green Thumb	Time Poor	New Seekers	Total
Autumn 2001	2.6	2.9	3.1	3.6	4.2	2.1	4.2	3.3
Spring 2000	2.8	2.8	3.2	3.7	4.1	2.2	4.1	3.4
Spring 1999	2.3	2.7	2.9	3.6	4.2	1.9	4.5	3.2
November 2003	2.4	2.9	2.7	3.8	4.2	2.1	4.4	3.4

I see my garden as an expression of myself	Cut Flowers	Bargain Hunters	Not Conf.	Self Expr	Green Thumb	Time Poor	New Seekers	Total
Autumn 2001	3.0	2.4	2.8	4.0	4.1	2.6	3.9	3.3
Spring 2000	2.8	2.8	2.8	4.0	4.1	2.7	3.8	3.3
Spring 1999	2.8	2.6	2.9	4.2	4.2	2.6	4.2	3.5
November 2003	2.9	2.7	2.7	4.0	4.2	2.9	4.0	3.5

Shopping for plants is social and entertainment for me	Cut Flowers	Bargain Hunters	Not Conf.	Self Expr	Green Thumb	Time Poor	New Seekers	Total
Autumn 2001	2.7	2.6	2.6	3.3	4.3	2.0	4.1	3.1
Spring 2000	2.7	2.7	2.7	3.3	3.8	2.2	3.9	3.1
Spring 1999	2.7	2.8	2.5	3.4	4.1	1.8	4.2	3.2
November 2003	2.7	3.0	2.5	3.6	4.1	1.7	4.2	3.3

I'm not confident about gardening so appreciate advice	Cut Flowers	Bargain Hunters	Not Conf.	Self Expr	Green Thumb	Time Poor	New Seekers	Total
Autumn 2001	3.3	3.8	4.2	2.1	1.8	1.8	4.1	3.0
Spring 2000	3.0	3.7	4.1	2.3	2.1	2.3	3.8	3.1
Spring 1999	2.9	3.9	4.0	2.0	1.9	1.8	4.2	2.9
November 2003	3.2	4.0	4.1	2.2	2.0	2.0	44.0	3.1

I was born with a green thumb	Cut Flowers	Bargain Hunters	Not Conf.	Self Expr	Green Thumb	Time Poor	New Seekers	Total
Autumn 2001	1.9	1.8	1.7	3.4	4.1	2.2	2.7	2.6
Spring 2000	2.6	2.0	1.8	3.3	3.6	2.4	2.6	2.6
Spring 1999	1.8	1.6	1.5	3.3	4.0	2.0	2.6	2.5
November 2003	2.0	11.6	1.7	3.1	3.8	1.9	2.5	2.5

I am new to gardening and seek out ideas	Cut Flowers	Bargain Hunters	Not Conf.	Self Expr	Green Thumb	Time Poor	New Seekers	Total
Autumn 2001	2.3	3.1	3.0	1.7	1.5	1.7	3.4	2.4
Spring 2000	2.0	3.0	3.3	2.0	2.0	1.9	3.3	2.5
Spring 1999	1.3	3.1	3.0	1.3	1.4	1.3	3.2	2.6
November 2003	2.3	2.9	3.0	1.6	1.5	1.6	3.2	2.3

7.4 WATER RESTRICTION CLUSTERS

Factor analysis of responses on key water restriction related questions identified seven clusters. :

1 HIGH INVOLVEMENT GARDENERS (17%)

This segment are the highest users of all retail channels. They just love to shop for gardening items. On average they do 41 Trips per year for garden related items.

- 97% Pro Waterwise accreditation
- 93% Would visit a Model Waterwise display
- 85% Sought Solutions
- 75% Doing best I can
- 69% Would attend a seminar
- 69% Would visit a display at Garden Centre
- 67% Love their garden
- 44% Don't mind saving shower water
- 38% Spent too much not to keep it looking good
- 39% Would visit Grey Water Shop
- 35% Would visit Rain Tank Shop

2 NO TO SERVICES (17%)

This is the segment interpreted the water restrictions as injunctions, have stopped watering their gardens and are not interested in any of the services suggested.

3 WATER SAVERS (9%)

This segment loaded on water – recycling, saving water, were interested in water tanks and a one stop water tank shop. They tend to be establishing a garden and are looking for solutions.

4 **SAD – REDUCED ENJOYMENT (13%)**

This segment whilst feeling sad about the way their garden looks and their enjoyment of their garden, in many ways had similar although slightly reduced interest in many of the proactive activities the Nursery Industry might undertake. Thus this is a segment who will respond to initiatives. At the moment many have stopped or cut back on activities in the garden. Many are Green Thumbs [15%]

- 96% Pro accreditation
- 94% 1-2-3 Drops Seekers
- 93% Would visit Model Display
- 83% Irritated seeing council waste
- 74% Stopped watering lawn
- 74% Would attend a seminar
- 63% Would visit a display at Garden Centre
- 57% Seek advice from Garden Centre
- 46% Don't mind saving shower water
- 43% Delayed anything new
- 41% Stopped buying seedlings
- 32% Believe the restrictions are 'too restrictive'
- 35% Stopped Veggie Patch
- 35% Would visit Grey Water Shop
- 35% Would visit Rain Tank Shop
- 33% Would consider Mulching Service

5 **DIFM (18%)**

This is the largest segment by size and has a higher male representation [32%]. They loaded positively on the suggested services. They are the least likely to say they are doing the best they can. This group showed the highest interest [33%] in the suggested mulching service. They also are most likely to believe that the water restrictions are Permanent [67%] and so can rationalise expenditure on services.

6 **DIY (14%)**

High male segment [33%]. 58% would check out the Waterwise website. And wanted the industry advice via the web. Highest representation of Working full time [45%].

7 **LOW INVOLVEMENT (11%)**

Highest male segment [44%]. Least involved with the garden. Not too involved or impacted by the water restrictions. Least likely to have bought items from Garden centres. Least likely to have sought a solution.

Although there are seven clusters there are only four key drivers:

1. Either high or low Involvement with the garden
2. Emotional sadness about how the garden looks and loss of enjoyment in the garden. There are two clear segments who both reacted with strong sad feelings. The difference is that one responded by doing nothing and the other is still quite attached and in many ways has similar responses to the high involvement gardeners.
3. Delivery of information and services. One segment prefers DIY and the other DIFM.
4. The last segment were interested in Water saving.