ANNUAL NGA SURVEY PROVIDES INSIGHT INTO CUSTOMERS’ MINDS

Survey reveals what consumers think

I'M A BIG FAN of the National Gardening Association’s annual National Gardening Survey. Bruce Butterfield’s group works with Harris Interactive to provide a profile of who is buying what in the outdoor gardening market each year.

New this year to the survey was another perspective on not just what gardeners buy, but what they think. This new data give growers and retailers some exciting information with which to work.

How gardeners behave

Gardeners are people, which means they’re not all alike. The NGA survey looked at gardeners by their behavior, or what they liked to do, and their reasons for gardening, or what they think.

Non-gardeners. Non-gardeners comprised 23 percent of the survey and won’t be visiting garden centers anytime in the near future.

Just Cut the Grass. Next least likely to become good customers are the “Just Cut the Grass” folks who comprised 15 percent of the sample. Gardening just doesn’t interest them, to which 58 percent responded affirmatively. They think gardening is too much work (51 percent) and takes too much time (50 percent). They spent only $165 on lawn and gardening activities, probably more of the former than the latter, and well under the $387 average spent by Americans on lawn and gardening activities.

They chose to spend only 1.3 hours per week, and nearly all of that time was cutting grass. They aren’t big customers of independents, because they can get a better deal on the few things they need elsewhere.

Master Gardeners and Enthusiasts. Two percent of survey respondents were classified as Master Gardeners and 7 percent as Enthusiasts. Both groups are avid hobbyists with whom garden center retailers love to talk. They spend nearly seven hours each week in their garden. Even more, they love gardening products nearly as much as the retailers.

According to the survey, they spent an average of $704 on lawn and garden activities, more than double the $387 average that U.S. households spent on lawn and gardening in 2005. Their activities and plant affinities are quite diverse, as reflected in their spending on a wide range of plants and products. They are a core group of customers for garden centers, but also buy gardening products and plants at home centers, mass-merchandisers and many other outlets including mail-order.

A whopping 85 percent said they enjoy gardening and that gardening makes them happy. We love them a lot, but realize they are only 18 percent of the entire market.

Casual Gardeners. Casual Gardeners spent $435 on gardening in 2005, which is also above the national average. They only spent four hours in the garden each week, almost half of the Master Gardeners’ time. Casual Gardeners are key garden center customers but they, like Masters Gardeners, also spend some time and money on gardening in home centers, supermarkets, and feed and seed stores. They aren’t as fanatic about gardening as the Master Gardeners with only 71 percent saying they enjoy gardening and 54 percent saying gardening makes them happy.

Reluctant Gardeners. Reluctant Gardeners spent $352 on lawn and garden activities, which is very close to the national average. They were bigger spenders than average on watering equipment, insect controls, garden tools, power equipment and especially floral products.

While the Reluctant Gardeners spent only about two hours per week in their garden, they recognize the value that gardening has to their home.

Applying the numbers

Here’s how this gardening customer information can be valuable to you in your business.

Marketing Math 101. This class would begin with the above survey numbers and a typical market. For example, let’s say you live in a market area of 100,000 households. You can find the actual size of your market area by investigating American Fact Finder (http://factfinder.census.gov/home/saff/main.html?_lang=en) and typing in your ZIP code.

Based on the National Gardening Association data, you could assume you’d have 2,000 Masters, 7,000
Enthusiasts, 30,000 Casual Gardeners and so on. The 2,000 Master Gardeners and 7,000 Enthusiasts represent an annual spending on lawn and garden products of $6.34 million ($704 x 9,000).

As much as garden center retailers enjoy the Master Gardeners and Enthusiasts, there are two key market segments worth taking a second look at. The Casual Gardeners represent a market potential of $13.05 million ($435 x 30,000) and the Reluctant Gardeners in this market are worth $8.1 million ($352 x 23,000). Together, the Casual and Reluctant Gardeners in this modest-sized market area spend $21 million on lawn and gardening, nearly four times the total amount of Masters and Enthusiasts.

But, these groups don’t garden for the same reasons. This is what makes the “What Gardeners Think” survey such a valuable piece of information. The Casual and Reluctant Gardeners enjoy gardening, but see it primarily as a way “to decorate and beautify my home.” It makes their “outdoor space more livable” and “adds curb appeal” to their home while increasing their real estate investment. It’s about decorating and enjoying the beauty of the garden, not the activity of gardening itself. These two groups responded favorably to words like relax, entertain and decorate.

The National Gardening Survey is available for $495.


CONTACT INFORMATION
Bridget Behe is professor, Michigan State University, Department of Horticulture, (517) 355-5191; behe@msu.edu.