



Irish Consumer Attitudes to Gardening & Purchases of Garden Products

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Introduction – Research Method

As part of an on-going monitoring of the value of the Irish gardening market, market research was undertaken by TNS MRBI on behalf of Bord Bia which found that Irish consumers were spending an estimated €1 billion on trees, plants, flowers and other garden products for their home and garden (see an analysis of this survey in Appendix 1.). This figure excludes the corporate sector spending on landscaping for housing developments, commercial property, roadside planting or interior landscaping. A 2007 assessment of the value of the landscape sector estimated it to be worth €826 million (a figure based on the aggregated turnover of landscape companies).

Having established that the market size for gardening and landscape products was significant and growing strongly, Bord Bia engaged Amárach Research (market research consultants) to better understand how it operated from a consumer perspective. To this end, in 2008 Bord Bia undertook further market research into Irish consumers behaviour and attitudes in relation to all garden related matters. The objective of this research is set out below.

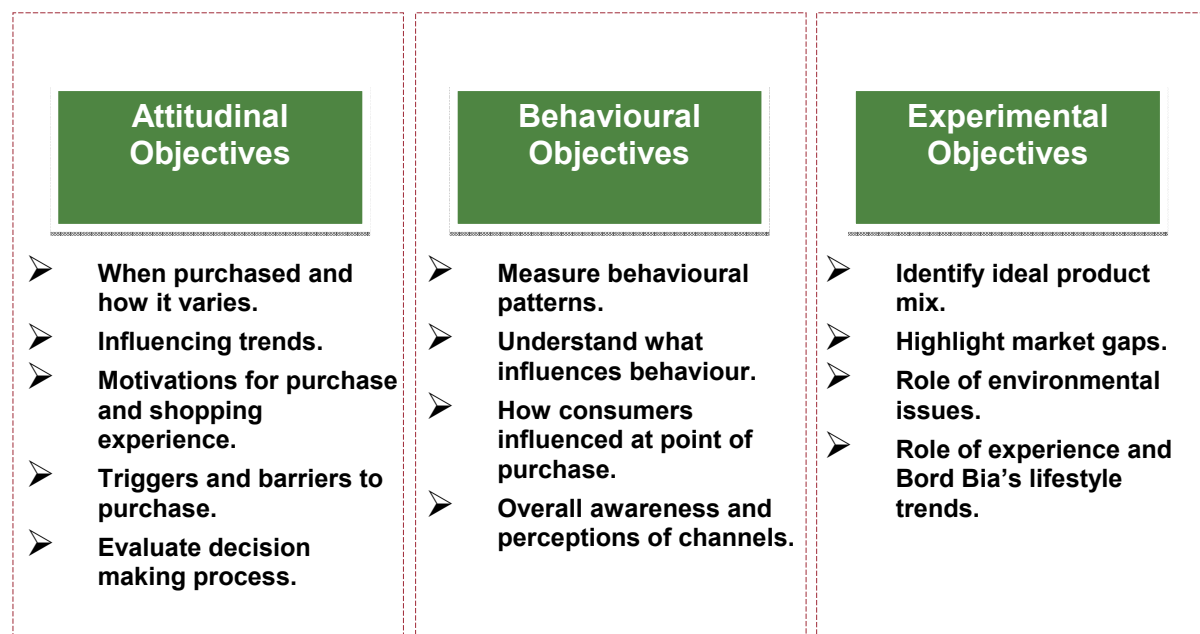
Research Objectives

Building on past research, in 2008 Bord Bia undertook consumer market research with the following research objective:

The primary research objective was to understand consumer behaviour, attitudes and influences driving decision making around the purchase of plants/garden products in the Republic of Ireland. A particular emphasis within the research was placed on increasing plant sales, particularly for Irish grown plants.

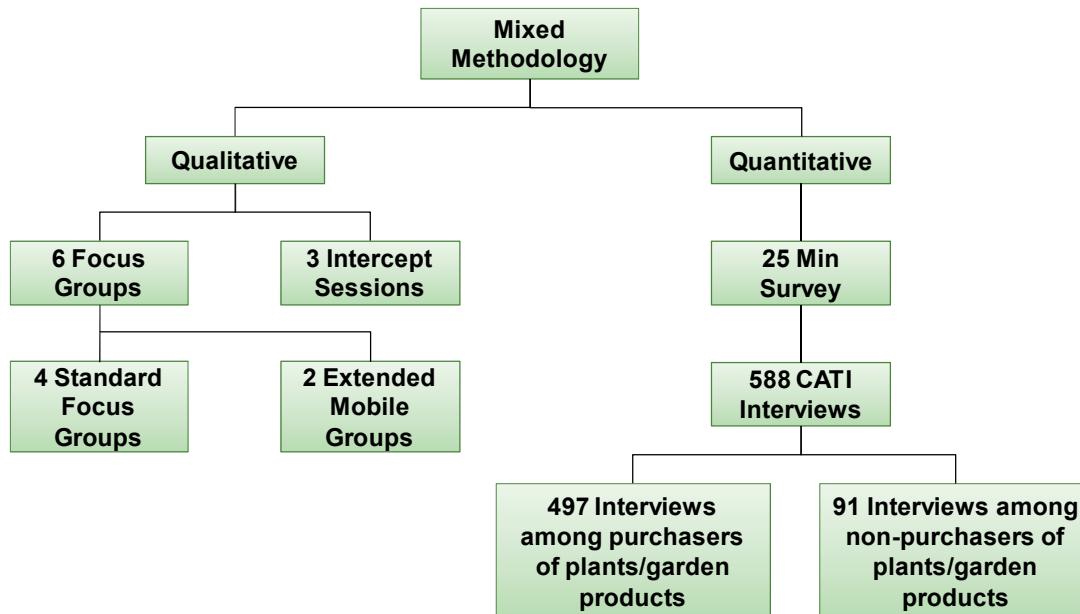
However within the overall primary objective lay a number of other objectives that Bord Bia wished to investigate.

The primary research objective was therefore sub-categorised under three broader



Research Methodology

This research was conducted using mixed quantitative and qualitative methodologies:



The qualitative phase was mainly based around **focus group research** while the quantitative phase involved **telephone interviews**. All qualitative research was conducted between 18-20th March 2008 and quantitative research was carried out from 31st March to the 11th April 2008.

As such this research and subsequent report is split into two phases of findings. Initial qualitative depth research was undertaken primarily using consumer focus group sessions to understand the current attitudes and behaviours in relation to modern Irish consumers. However qualitative research by virtue of the smaller numbers involved, only provides a snapshot of the main consumer issues. The prevalent attitudes and behaviours coming out of the qualitative phase of the research were then authenticated across a sample of purchasers and non-purchasers in the general Irish population (representative of purchasers of plants and garden products). This was done in the quantitative phase of the research which involved 588 telephone interviews. This latter phase provided a robust sample size of the population which was sufficient to allow numerical analysis of consumer behaviours/attitudes across a wide range of gardening issues.

Presentation of Results

The report is written up in the two phases along the lines it was actually conducted. However, as well as providing a number of generalised research findings, this report also includes an analysis of the implications of these same findings. This analysis will hopefully present opportunities for all horticulture professionals involved in either the growing or selling of garden flowers/plants and products in Ireland. For further information on this report contact:

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Consumer Behaviour and Attitudes to Gardening – ‘Focus Group’ Qualitative Research Findings

Introduction

This first main section of the research findings was the ‘qualitative’ phase of the research. This phase of the market research involved feedback from the 6 focus groups sessions which were held to understand the background issues in the gardening market (see Research Method page 2). This part of the research is based on in-depth discussions with about 50 consumers and explored their ‘opinions’ and any ‘issues’ they may have had in buying plants and gardening products. The findings of this first phase of the research were then fed into the wider scale ‘quantitative’ phase of the study. To supplement the focus groups a small number of consumers were observed and intercepted at point of sale, and then interviewed directly.

Indoor vs Outdoor Plants and Garden Products



The majority of consumers were found to engage with plants and gardening in an outdoor context rather than indoors.

Indoor was regarded as being a more restrictive space to work within and space available for plants was secondary to household fixtures and fittings. There was also a smaller range of flowers/plants to select from and typically indoor plants required less care, maintenance and skill. As a result indoor plants and flowers were not engaged with by consumers at the same level as outdoor flowers and plants. Outdoor gardening had a wider scope and appeal in terms of facilitating different designs and personal expression. As a result outdoor gardening was seen to require more care, attention and skill all of which generated a greater sense of pride and interest.

Implication

There is greater scope to sell a wider range of outdoor plants to consumers looking to improve the garden outside rather than their interior space. However this is only the case if consumers have an interest in gardening, gardening skills and a garden of sufficient size. As current housing trends are resulting in smaller gardens or none (for apartment/townhouse dwellers), there will be increased opportunity for indoor plants, hanging baskets and container plants.

Consumers General Outlook on Gardening



There were two distinct ways that gardeners looked upon gardening and having to do work in the garden;

- gardening as a necessity and a chore.
- gardening was a pleasure and an active hobby.

The first group to be considered were those who saw gardening ‘as a necessity and a chore’. These gardeners did not enjoy the act of gardening itself. They were likely to focus on the drawbacks of gardening but were willing to endure them, as they appreciated and enjoyed the finished product and use of the finished garden space. The second group of gardeners had an outlook that gardening was ‘a pleasure and an active hobby’. Those gardeners actually enjoyed the act of creating and maintaining a garden. These gardeners also enjoyed the finished product or garden space after the hard work had been completed. Both types of gardeners undertook similar activities in the garden but their difference in attitude was important. Those who saw gardening as a chore looked for short cuts or convenient solutions to producing the final finished garden, but those who saw gardening as a hobby were more likely to ‘enjoy the journey’ and experience undertaken to produce a quality finished garden they could be proud of.

Implication

Nurseries and garden centres must recognise the two types of gardener that exists in the Irish population. Not all people are as enthused by flowers/plants and gardening, as many of the owner managers and business operators. The Irish gardening sector must therefore adapt their product offering to cater for the ‘enthusiast’ and the ‘coerced’. Delivering something new or different is key to sustaining the interest of enthusiasts, while providing basic quick fix gardening solutions can often be the most valued approach for those who have little or no interest.

Benefits Associated with Gardening



Consumers articulated a wide range of benefits that were associated with gardening. These benefits were the benefits of actually conducting or carrying out gardening, such as relieving stress/tension, allowing for exercise, relaxation and an expression of their creative tendencies. At the other end of the spectrum there were also benefits associated with gardening that were all about enjoying ‘the finished product’ rather than its creation. These benefits included sensory stimulation, pride and adding value to the gardener’s home/property.

Implication

All industry stakeholders need to promote gardening as a potentially hugely rewarding experience that can deliver the benefits articulated above. Consumer education and communications has a huge role to get this message out to the public.

Drawbacks of Gardening

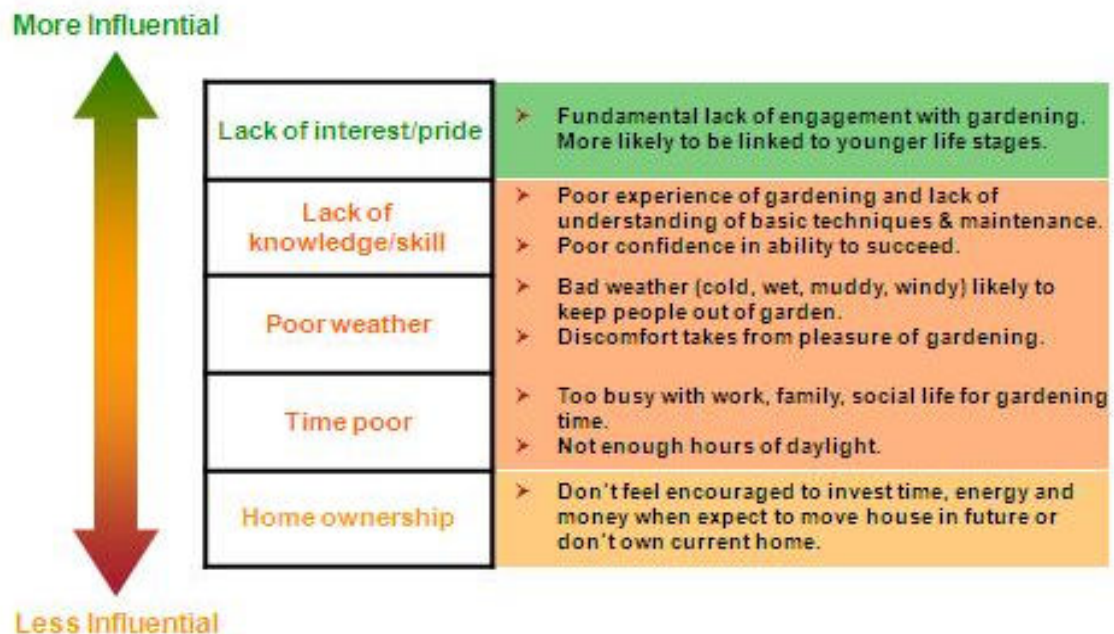
<p>Time Consuming</p>  <p>➤ The actual number of hours required to be invested.</p>	<p>Needs Constant Attention</p>  <p>➤ Repeated and constant effort required over a long period of time.</p>	<p>Can Be Expensive</p>  <p>➤ Cost of products and tools can be significant.</p>
<p>Physical Effort</p>  <p>➤ The manual labour involved and associated fatigue and potential pain (back pain).</p>	<p>Disappointment</p>  <p>➤ When designs don't work, plants die, etc.</p>	<p>Dirt/Mud/Muck</p>  <p>➤ The dirt and grime that needs to be endured and cleaned off.</p>

There were specific drawbacks associated with gardening that some gardeners felt were the negative side of doing work in the garden. Gardening can take up time that could be used doing other activities, gardening also needs constant attention and a commitment to keep working on the garden on a continuous basis. The cost of gardening was also seen as another drawback as plants, garden products and tools can be expensive. Some consumers regarded the exercise gained when gardening as a benefit but some regard this physical effort to be tiring and could in some cases cause pain (back pain being a common complaint). The disappointment associated with any failed growth or design was another negative, as too was the dirt and muck that needs to be endured and cleaned off when gardening was finished for the day.

Implication

Those who love gardening as a hobby mostly will not see the drawbacks listed above as in any way negative or off-putting. On the contrary some of these so-called drawbacks will be seen as positives by the enthusiasts. Nevertheless it is important to remember there is a cohort of people who are less enthusiastic about gardening for the above reasons. In fact it is these drawbacks that open market opportunities to sell products that provide a solution to the drawbacks e.g. labour saving machines and devices, gardening clothes/foot wear, cleaning products, etc.

Barriers to Consideration of Gardening

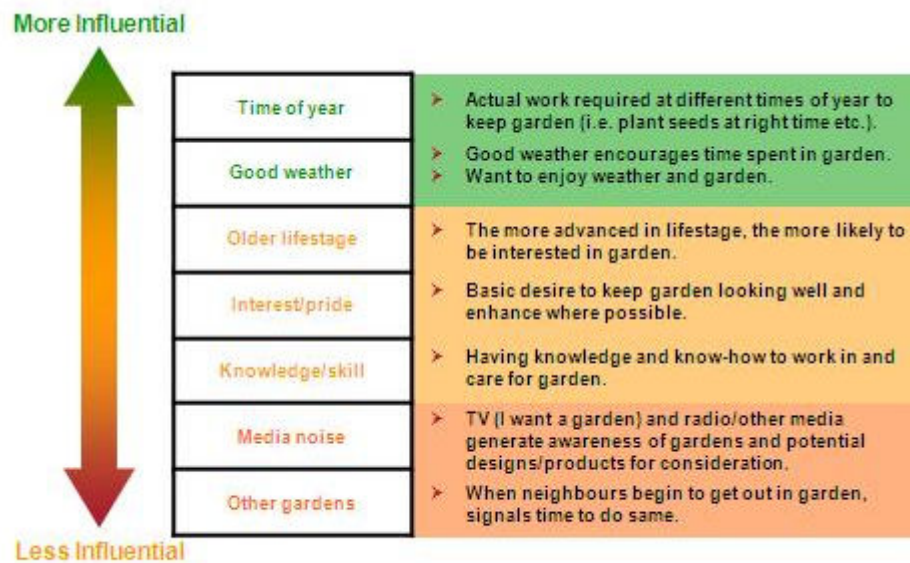


There were the five key barriers to individuals actually considering, or deciding to engage in gardening. A lack of interest or pride in gardening and their own garden was typically associated with some younger life stage individuals, with a lack of knowledge and poor skills being the limiting factor. Across the various life stages certain individuals wanted to engage more with gardening but simply didn't have the 'know how' or confidence. Poor weather (rain) was and is something that dissuades people from going out into their garden and there is little that can be done to overcome this barrier. A person not having the time for gardening due to busy lives and other commitments was seen as another common barrier. Finally, lack of home ownership was seen to reduce the desire to invest time and money in gardening – people in transition were less likely to invest time or money in a garden they would be moving away from in due course.

Implication

- The lack of interest or pride in gardening and their own garden, which was typically associated with younger individuals, requires education and communication of the benefits of gardening to overcome.
- For those individuals (across the various life stages) who wanted to engage with gardening but didn't have the 'know how' education, information/training is key to developing their basic skills/knowledge of gardening.
- For those people not having the time for gardening due to busy lives and other commitments, they need to have quick gardening solutions/products made available to them to encourage more engagement with gardening.
- For those who didn't own their own home and were not willing to invest time and money in gardening, they need to be offered either low cost or mobile solutions to encourage initial engagement e.g. container gardening, hanging baskets, etc.

Triggers to Consideration of Gardening



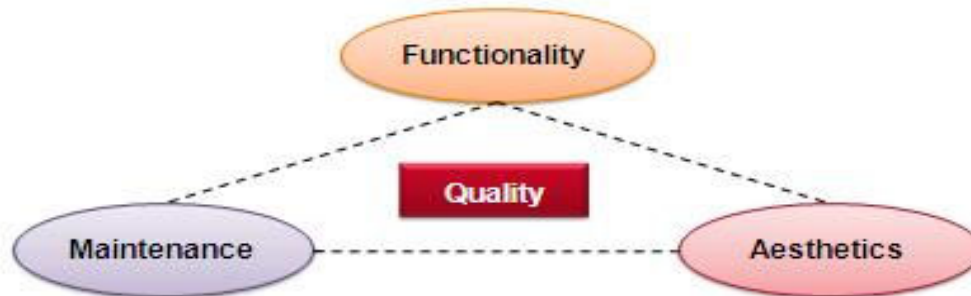
There were seven key triggers that were identified from the research that encouraged individuals to engage with and actively consider gardening. The uncontrollable and variable factors included the work required at certain times of the year, good/bad weather, life stage of the individual and the activity in other gardens or of other gardeners. The factors which could be influenced included developing an awareness/interest and pride in gardening, improving knowledge and gardening skill levels and increasing the media noise as key triggers.

Implication

There were things that the industry could not directly impact, such as time of year, weather, life stage and activities taking place in other gardens and as such minimal activity can be undertaken to actively encourage these triggers. However, awareness/interest and pride in gardening, increasing knowledge/skill levels of gardening and greater media profiling of gardening were all key triggers that the industry could leverage by communicating and educating to individuals at key points of contact.

Consumers Desire and Perception of 'Quality'

Consumers Three Cornered Fight for Quality



- Ongoing struggle to maximise all three elements.
- Maximisation of one point can often be to the detriment of another.
 - A trade off in importance is required.
- Depending on life stage the importance of each element varies.

Gardeners were involved in a constant struggle to develop and produce the most suitable garden for their specific needs.

An 'ideal garden' was:

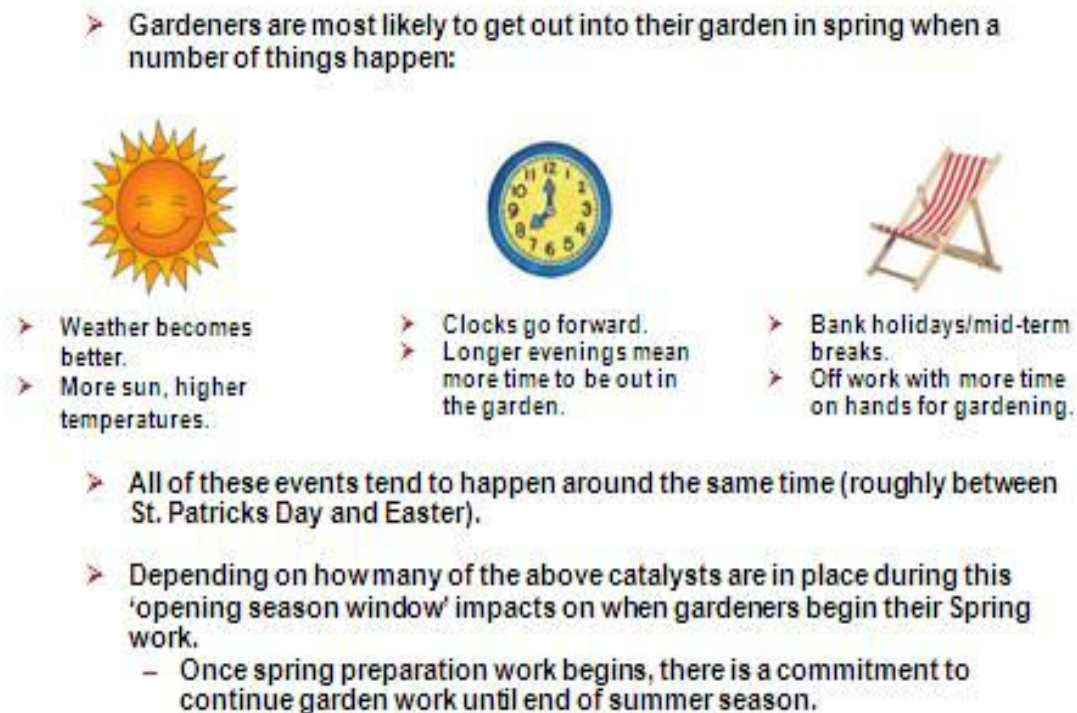
- functional allowing for the practical use of the garden space
- aesthetically pleasing and pleasant to look at
- low / minimal maintenance

However, conflicts occurred when gardeners realise that they can't have all the benefits of functionality, aesthetics and maintenance all at the one time. Typically, increasing one element required another to decrease, for example a garden that was very pleasant to look at and was aesthetically pleasing, was not found to be as functional for children to play in and was thought to require a high level of attention and maintenance. As a result individual gardeners had to find their own 'balance', which traded off all three of these aspects, to produce a garden that best suited their needs.

Implication

Garden centres and landscapers should be fully aware of the conflicts which arise in relation to consumers attaining their 'ideal garden'. Garden centre products and landscaper design proposals should reflect a balance of functionality, aesthetics and maintenance - in keeping with consumers enthusiasm for gardening, their skills/ability to develop/maintain a garden, their lifestyle aspirations and their stage of life needs.

The Start of the Gardening Season

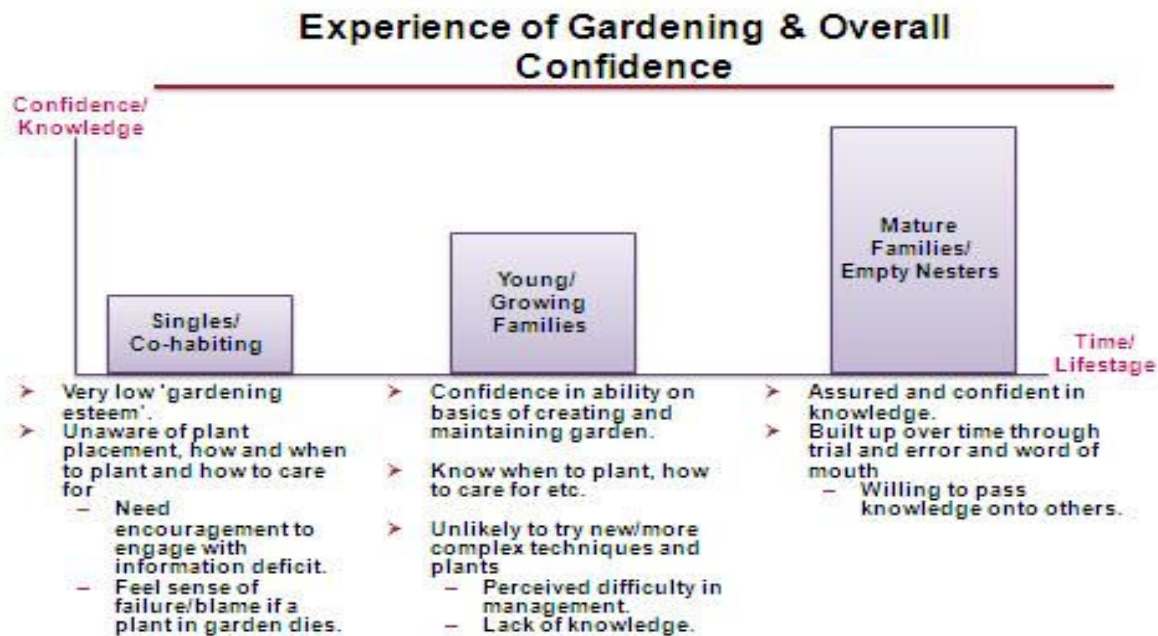


There was no specific date or time that gardeners decided to go back out into their gardens to do work after the winter months. There were a series of events that occurred that acted as signals and provided opportunities to get out into the garden. The first is the weather, as temperatures rise and the sun comes out, it is more pleasant to be out in the garden and the potential for growth and flowering in the garden increases. Secondly the evenings get longer with more hours of daylight and the clocks go forward. This provides more time to actually get out in the garden. Finally bank holidays and children's mid term breaks (a lot of parents take this time off work too at this time) begin to come around which provides more time to do work in, and enjoy the garden. These events are all relatively moveable feasts but tend to occur between St. Patrick's Day and Easter. This is when the majority of people begin to turn their attention back to their gardens.

Implication

In Ireland it's really all about the weather and a sudden rise in temperature and break in the rainfall from March onwards can trigger a new gardening season. Garden centres should have planned their stock requirements in advance to meet this peak period in garden centre sales, but also should be prepared to carry stock should the weather not lift or revert to winter type conditions.

Life Stage Influence on Gardening Needs & Knowledge



The research identified three distinctive types/segments of gardener based on a life stage analysis.

1. Singles/co-habiting couples – these were young professionals starting off in life, a new job, a first home, etc.
2. Young/growing families – these were older but more secure in terms of job and home. They had children and a lot of energy goes into raising their family.
3. Mature families/empty nesters - these were older couples whose children had grown up, gone to further education, taken up employment but critically had left the family home.

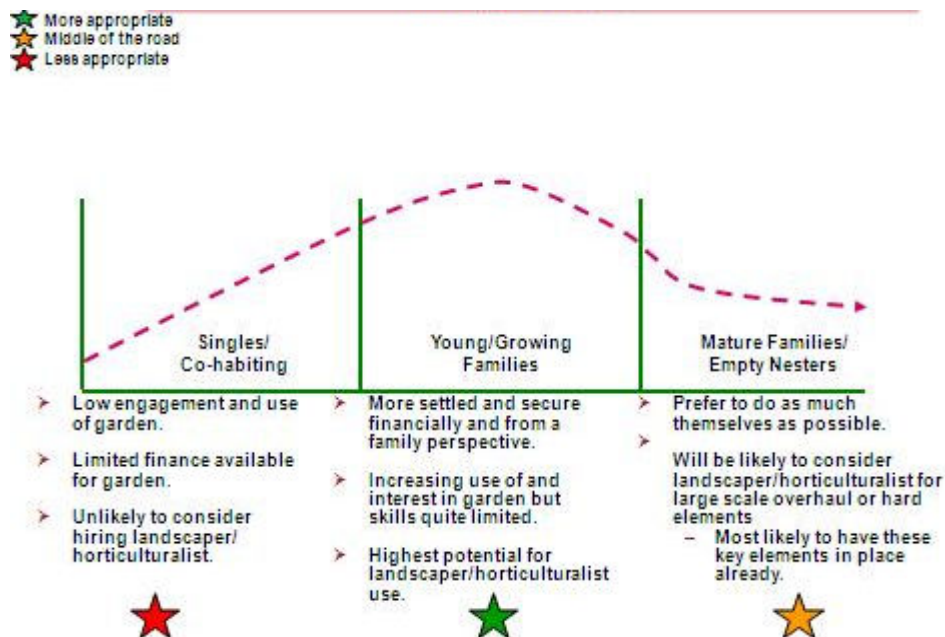
Confidence in their own gardening ability and actual gardening knowledge varies as individuals move through three life stages.

In general, singles/co-habiting couples had very little exposure to and experience of gardening, and were not confident in their gardening ability. Trial and error coupled with learning from more experienced gardener's advice was the key manner in which confidence and knowledge was increased. This was a constant journey of discovery with singles/co-habiting being the least enlightened and mature families/empty nesters typically being the most informed, most confident and most enthusiastic gardeners. There was no snobbery or elitism associated with this heightened knowledge. The genuine interest in gardening meant that mature families/empty nesters were happy to share information with those less knowledgeable and in effect help educate them and increase their own gardening skills, knowledge and confidence.

Implication

Garden centres and landscapers should be fully aware of their customer base and be in a position to offer products and services tailored to their life stage needs.

Influence of Life Stage in Engaging Landscape/Gardening Professional



On closer review, the potential for the three identified life stage segments, to engage the services of landscape professionals varied considerably. Households of singles/co-habiting and mature families/empty nesters had a lower likelihood of hiring landscape professionals compared to young/growing families. Singles/co-habiting households had a lower interest in gardening and had more immediate concerns around establishing a career, furnishing their home, etc. They typically had an interest in their garden but they didn't have the time or finance available to hire professional services. Mature families/empty nester households typically preferred to do as much work in the garden as they could themselves. They would consider landscape professionals for large scale work in overhauling a garden but they were most likely to have all the 'permanent items' in place and it was less frequently a full garden redesign job that was needed (which would encourage them to hire a horticultural professional).

Young/growing family households represented the greatest potential for landscape professionals – however many were constrained by demands on their money

Young/growing families were settled (typically owning their homes) and financially more secure than singles/co-habiting. These households had the interest in the garden but didn't have the confidence in their own ability or oftentimes the time to invest in the garden themselves.

Implication

Landscape professionals should be aware that it is the younger/growing family households that represent the greatest potential for commissioned work. They should be in a position to offer a full range of services/products based around the role of the garden in these people lives (and their aspirations). However, these are the group with the greatest pressure on money. In this regard, knowing the relative income profile or offering appropriate lower cost landscape solutions may be important.

Use of 'Permanent' Garden Items

Construction	Garden Equipment	Trees & Shrubs	Ornamental
			
<ul style="list-style-type: none"> ➤ Large scale garden work which requires significant spend. ➤ Most likely once off at time of garden design or over-haul. ➤ Strong likelihood of landscape/horticultural professional being hired. 	<ul style="list-style-type: none"> ➤ Significant additional hard elements to augment garden on top of construction. ➤ Medium to long term purchase and will be replaced as needed. 	<ul style="list-style-type: none"> ➤ A long term permanent element of garden. ➤ Preference for maturity level and price impact on purchase. ➤ Potential for disappointment with less mature plants <ul style="list-style-type: none"> – Failure to grow or not as expected. 	<ul style="list-style-type: none"> ➤ Lower cost but permanent fixtures. ➤ Part of design element <ul style="list-style-type: none"> – Finishing touches of permanent garden design.




'Permanent' garden items were defined by consumers, as the plants and garden products that gardeners regard as more permanent items of their gardens and would include them as an integral (immovable) part of their final garden design. A lot of thought and consideration was put into the purchase of these items compared to more changeable aspects such as small plants/flowers. These were less frequently purchased items that were intended to form the foundation of the garden design around which smaller changes could be made on a more regular basis.

Construction (earth moving), garden equipment (sheds), trees and shrubs and ornamental features (e.g. a pond, pools, recesses and statues) were the 'top-of-mind' key 'permanent' garden items.

Implication

'Permanent' garden items were less frequently purchased items and gardeners expected to pay more for them. Therefore a great deal more attention would be given to choices surrounding these items. Garden centres and landscapers should be aware of this and be in a position to give full information on the range of options, costs and products available to their customers/clients.

Use of 'Shorter Term' Garden Items

Garden Tools	Small Plants/Seeds	Maintenance/Upkeep
		
<ul style="list-style-type: none"> ➤ Used to help maintain and tidy garden. ➤ Motorised tools more expensive and used for maintenance. ➤ Manual tools used more to create and design/plant garden. 	<ul style="list-style-type: none"> ➤ Short term aesthetic/sensory elements that improve overall garden foundation (permanent elements). ➤ Easily changed and where most garden change occurs. ➤ Short term investment, changed regularly. 	<ul style="list-style-type: none"> ➤ Routine care and attention given to soft elements to ensure growth. ➤ Ongoing regular need to use in order to keep growing elements of garden healthy and at their best. ➤ Also includes upkeep of hard elements on a regular basis (i.e. decking oil, painting fences etc.).

'Shorter term' garden items were defined by consumers, as the plants and products where the majority of gardening spend goes, on an ongoing basis, once the garden was established. The primary focus and concern was on keeping the garden at a certain standard and to introduce variations as to how the garden looks over time. Many of the successes and failures were based on trial and error but the penalty for failure wasn't too much (e.g. maybe only the price of an individual plant).

Implication

These were more frequent gardening purchases than the permanent items and there was less consideration and thought attached to the decision to purchase them, as they were a lower cost, were changed more regularly and were easier to replace. Nurseries, garden centres and landscaper contractors should be aware of this and be in a position to offer a full range of product offerings but in particular new plant types or options for trial.

Considerations for Purchase of Plants/Garden Products

Necessity	<ul style="list-style-type: none"> ➤ For soft elements if plants are dying, unhealthy or general appearance is not as it should be or up to standard required. ➤ For hard elements, if in disrepair – most likely to buy protective or restoration products first before replacing.
Seasonality	<ul style="list-style-type: none"> ➤ As the seasons change – wanting to have a garden that grows and plants most appropriate to each season.
Design Gap	<ul style="list-style-type: none"> ➤ Feeling that there is an incomplete or empty area of the garden that needs to be filled.
Variety	<ul style="list-style-type: none"> ➤ A desire to have a constantly changing garden <ul style="list-style-type: none"> – Requires rotation and changing of plants at regular intervals.

Once in the garden, gardeners had their own personal view of what they wanted from their garden. If all was well and as they desired, then only maintenance work was done. However, certain catalysts could stimulate consideration of purchasing new plants and garden products.

There were **four key catalysts to consideration of purchasing plants and garden products** once individuals were in the frame of mind to consider gardening:

- 1. Necessity** - something that was needed for the garden if whatever is in a current place in the garden is no longer of the required standard.
- 2. Seasonality** - when different plants/flowers were purchased at the correct time of year (e.g. bedding plants in spring).
- 3. A Design Gap** - where there was an incomplete element in the garden design that needed to be filled.
- 4. Variety** – where there was a desire to have different elements in the garden and have a constantly changing garden landscape.

Implication

Nurseries, garden centres and landscapers should be aware of these four key catalysts of planned or impromptu purchasing and offer a full range of quality plants/garden product options to meet these needs - with full information on all plants/products. These four catalysts may be used by retailers, as a key prompt at point of sale, to get consumers thinking of their own gardening needs.

Key Consumer Purchase Occasions

★★★★★ More frequent ★ Less frequent		Purchase Frequency ↓
Design Opportunistic	<ul style="list-style-type: none"> ➤ Have an area in garden that needs to be filled. ➤ See something which sparks imagination and will fill the area. 	★★★★★
Impulse Incorporation	<ul style="list-style-type: none"> ➤ No specific gap in garden but see something appealing. ➤ Think where it could go in garden and if feasible will purchase. 	★★★★★
Design Specific	<ul style="list-style-type: none"> ➤ Have specific area in garden that needs to be filled and specific idea what should go there. ➤ Go to store and purchase item. 	★★
Repeat/Routine	<ul style="list-style-type: none"> ➤ Purchase same type/category of plant/product at same time (e.g. bedding plants in spring, poinsetta at Christmas etc.). 	★★★
Long term/Planned	<ul style="list-style-type: none"> ➤ Strategic vision of what garden will be and look like. ➤ A lot of thought and consideration prior to purchase, very infrequent. 	★
Gift	<ul style="list-style-type: none"> ➤ Purchase for others and tend to try to select visually appealing and relatively low maintenance flowers/plants. 	★★★



() = Depending on individual habit

There were six key purchase occasions that were relevant once a catalyst to purchase had been stimulated. Each of these occasions was subtly different and gardeners undertook a different thought and decision making process for each type of purchase. The purchase occasions varied (as listed above) from purchases that occurred on a regular and repeated basis, to those that were impulsive and were sought to be incorporated into the garden design later. There was also a gift occasion which appealed to gardeners in different ways. Some didn't feel plants/flowers were appropriate gifts to give except for some specific occasions and others were more liberal in their views of how appropriate plants and flowers were as gifts.

Implication

Giving customers and clients gardening ideas and prompting them to specific purchase occasions presents a great opportunity to increase plant and garden product sales. Using high impact colour, scent, foliage, etc. in prominent displays can be used to generate impulse purchase at point of sale. Consumers are open to using some plants/flowers as gifts but often they simply don't think about it – prompting of the latter may encourage some extra sales around major calendar events e.g. Easter, Christmas, Fathers Day, Mothers Day, etc. (see page 29 and 30).

Perceptions of Retail Channels of Purchasing

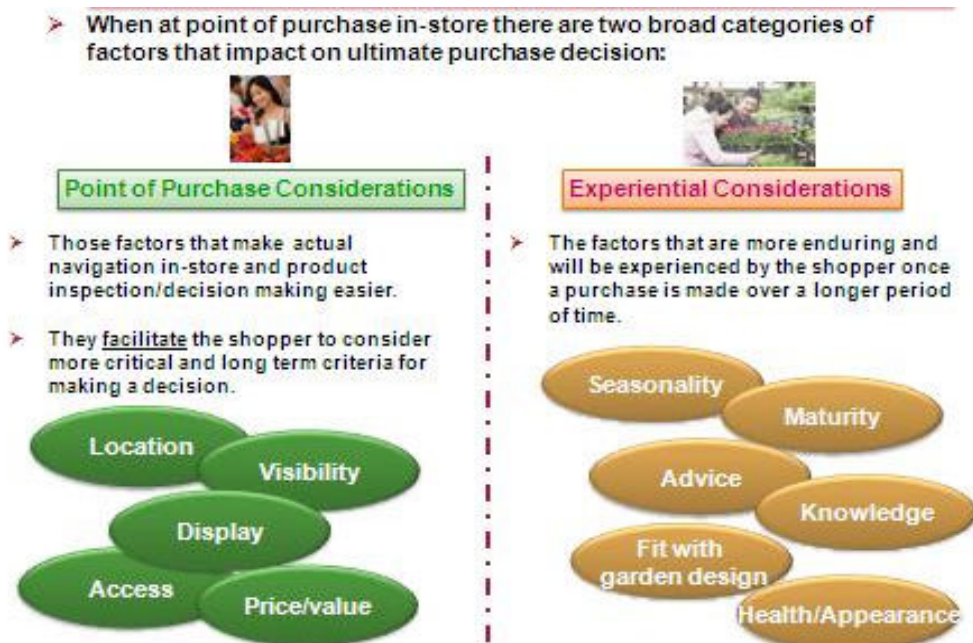
Core Channels Differences	
Independent Garden Centres	DIY Sheds
	
<ul style="list-style-type: none"> ➤ Expect higher quality produce <ul style="list-style-type: none"> – Cared for to a higher level. – More maturity. – Specialist providers – quality produce. ➤ Better advice and staff expertise. ➤ Professional touch. ➤ Better choice/range of products. Higher volume to choose from. ➤ More natural garden setting/atmosphere. ➤ Good for ideas. ➤ Can browse, relax and enjoy <ul style="list-style-type: none"> – An experience/day trip. 	<ul style="list-style-type: none"> ➤ Cheaper – less expensive. ➤ Good for basics, if you know what you want <ul style="list-style-type: none"> – Where quality is of lesser concern as less differentiation between channels (bedding plants, fertilisers, ornaments, hard elements). ➤ Commercial venture with hard sell – lots of special offers 3 for 2's/discounts. ➤ Cramped/cluttered displays. ➤ Plants not cared for at same level. ➤ Lack of staff expertise/limited presence/unable to get advice. ➤ Variation in offering – some very good others very poor.

Independent Garden Centres and DIY Sheds (e.g. B&Q, Atlantic, Homecare, etc.) were regarded as the two primary channels for purchasing plants and garden products. However, both were regarded as being more suitable for different types of purchases. Independent Garden Centres were regarded as being a more pleasant shopping experience, more relaxing, having a wider range and offering better quality of plants, however on the downside they were perceived as being more expensive than DIY Sheds. The retail staff in Independent Garden Centres was regarded as being very knowledgeable about gardening and to be a good source of information, which was in fact why many consumers (particularly novice gardeners) preferred to use them. DIY Sheds were perceived to be cheaper and more suited to purchases of items where quality was not paramount or not considered to be hugely variable, such as compost, tools, bedding plants, containers, pots, apparel, etc. Staff in DIY sheds was thought to be 'scarce on the ground' and oftentimes not very knowledgeable and even quite evasive.

Implication

As it stands in the Irish gardening retail market there exists quite a polarised view of the differences between the two main purchasing channels. The core advantage of Independent Garden Centres is a consumer perception of them being more knowledgeable, while offering a wider range of higher quality plants. While this is the common perception among the public, it is essentially important that the reality matches this perception through making available well trained, informed and friendly staff while stocking a wide range of well grown/healthy plants. The 'leisure experience' the public enjoy while visiting Independent Garden Centres should also be nurtured and enhanced as an important point of differentiation. As for DIY sheds it is important that they invest in the expertise at shop floor level to keep the public well informed, while price will always be their big attraction.

Key Influences on Purchase of Plants and Garden Products



There were two key sets of criteria that impacted on gardener's decision to purchase plants and garden products. The first were the point of purchase considerations. These were all the elements that made a decision easy or difficult at the point of purchase, but meant little after the purchase had been made.

'Point of purchase considerations' which influenced the purchase of plants included location, visibility, display, access and price/value.

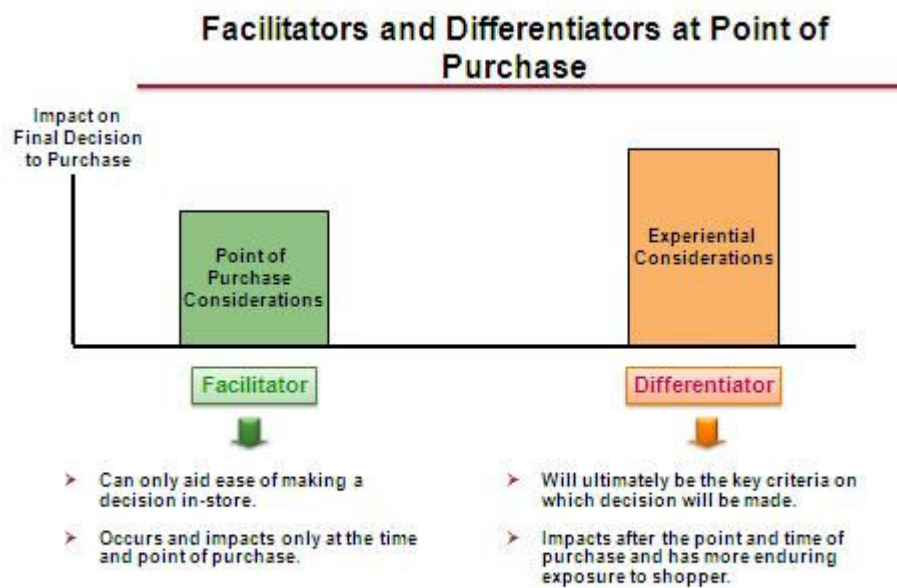
The second were experience based considerations or 'experiential considerations'. These were all the elements that ultimately were of benefit to the gardener over the longer term.

'Experience based considerations' which influenced the purchase of plants included seasonality, maturity, advice, knowledge, fit with garden design and health/appearance.

Implication

Both types of consideration were important to acknowledge in the overall purchase decision, so it is important that vendors of plants get the point of purchase formula right and back it up with ready access to key information on plants being available.

Point of Purchase & Experience Related Considerations



Point of purchase considerations made the actual initial ‘consideration of purchase’ either more or less difficult. They were ‘facilitators’ in that they facilitated the gardener engaging in a real trade off on the importance of whether they should purchase or not. This trade off ultimately occurred by weighing up the ‘experiential considerations’. They were ‘differentiators’, in that they ultimately were the key criteria that the gardener used to differentiate between whether to purchase or not.

Implication

Both types of consideration were important to acknowledge in the overall purchase decision, so it is important that vendors of plants get the point of purchase formula right and back it up with ready access to key information on plants being available. Experience based considerations were the ultimate deciders of purchase/non-purchase, so it is essential that consumers have enough information on plants to ‘buy in full knowledge’ of what they can expect.

Key Learning's for Retailers – Consumer Facilitators

- Have all products in a clearly identifiable and logical layout in store
 - Similar products nearby (including best compost for particular plants etc).
- Have clear signage and support to aid location of specific products (signposts, map etc).
- For smaller plants/flowers, displays that can be accessed from all sides (circular) work best as they allow shoppers to inspect from all angles and all products.
- For larger plants/trees etc, displays that show examples of finished/flowering products encourage consideration
 - Also promotes cross-selling consideration.
- Prices clearly marked and represent value
 - Don't mind paying premium price for premium quality.
- Special offers draw attention strongly when effectively communicated.

The above points were the key point of sale considerations (i.e. consumer facilitators) across all channels selling plants and garden products, to provide the best retail environment for gardeners making choices - in encouraging a purchase decision.

Implication

The above list of items represents the basic requirements to 'get right' in store to facilitate consumers to easily navigate, explore and assess the product range on offer in any gardening retail outlet.

Key Learning's for Retailers – Consumer Differentiators

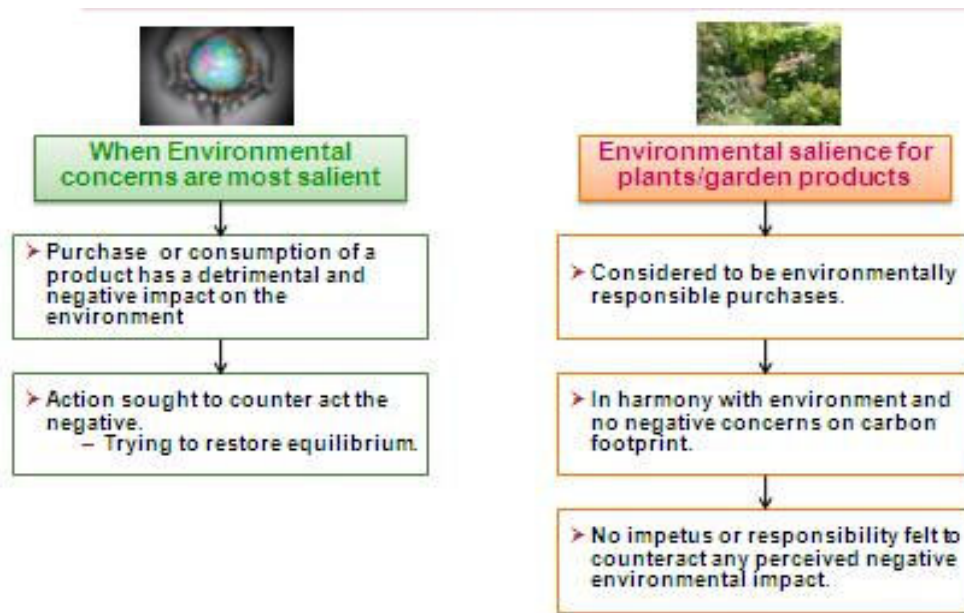
- Have seasonal products available at correct times
 - If in season or out of season, highlight.
 - Not considered best practice to sell bedding plants when still too early/too cold.
- Have a wide range of maturity levels of larger plants and different degrees of stages in flower for smaller plants/flowers.
- Garden design and fit is a personal thing. Provide a wide range of alternatives and display in different garden settings/displays where possible.
- Advice and education in store will increase gardeners' knowledge and ultimately broaden consideration set
 - Have knowledgeable and approachable staff (e.g. picture of staff with 'please ask me about x...', or staff experts/champions by segment).
 - Ensure posters and plant labels have relevant and easily understood information.
- Health and care of stock is important
 - Continuous watering as required, pruning and removal of wilting/dead products is required.

The above points were the key experience based considerations (i.e. consumer differentiators) across all channels selling plants and garden products, to provide the best retail environment for gardeners making choices - in encouraging a purchase decision.

Implication

The above list of items represents the key requirements to 'get right' in store to help consumers differentiate between plants and/or product ranges on sale in gardening retail outlets. Information, education and advice on plants and garden products are the vital component in this respect.

Role of Environmental Issues in Purchase of Plants/Garden Products



Environmental concerns did not feature as a big concern for those consumers buying plants and garden products. Environmental concerns were typically considered most relevant when purchase or consumption of the product or service had a negative impact on the environment. For example air travel, the use of non bio-degradable packaging, more recently communicated food miles, energy wastage, etc.

Plants and garden products were regarded as being good for the environment in themselves (i.e. plants remove carbon dioxide) and also in that they contribute towards enhancing a natural state of harmony within the environment.

Therefore there was limited potential to raise 'air miles' or 'recycling' of plastic pots/containers as further major environmental benefits, because plants and garden products were seen to be inherently positive for the environment in their own right.

Implication

It should be impressed upon consumers the role plants and garden products play in removing carbon dioxide from the air and therefore provide a 'power of one' contribution/solution to the problem of global warming on the planet. Irish grown plants grown close to source also enjoy reduced air mile advantages and therefore require less energy to transport them, compared to imported plants. Locally grown plants should be promoted as such for extra customer appeal, as this links in with many consumers desire to support their local community/country.

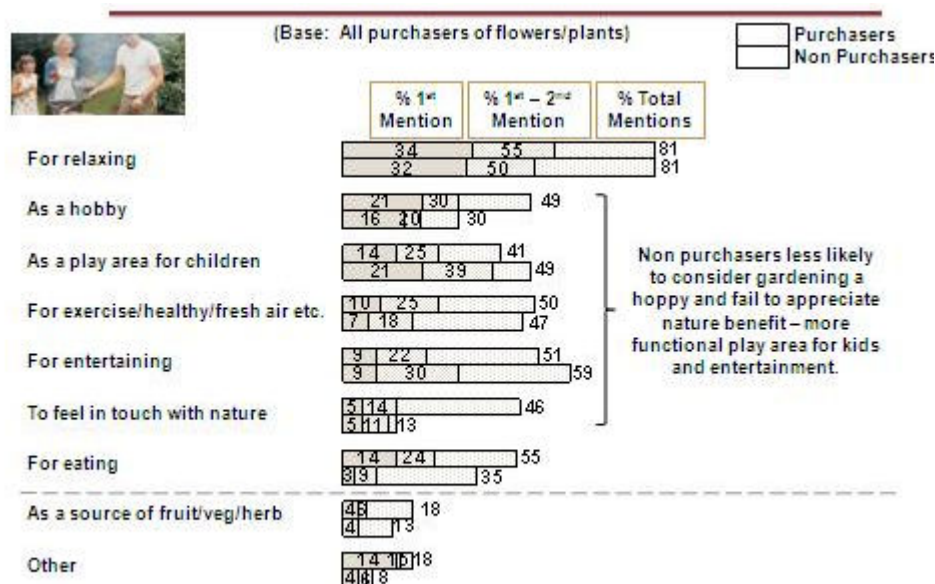
Consumer Behaviour and Attitudes to Gardening – Telephone Interview/Quantitative Research Findings

Introduction

This second main section of the research findings was the ‘quantitative’ phase of the research. This phase of the market research involved feedback from 588 (497 purchasers and 91 non-purchasers) telephone interviews (see Research Method page 2). This sample size was sufficient to undertake numerical analysis of consumer behaviours and attitudes (found from the focus group research) and comment on the statistical significance of the findings as real consumer trends in the market.

Roles and Uses of the Garden

The telephone survey was conducted across 588 consumers (i.e. 497 purchasers and 91 non-purchasers).



‘Relaxation’ was the most commonly cited use by all consumers for the garden with one in three mentioning this first, and over eight in ten mentioning it at all.

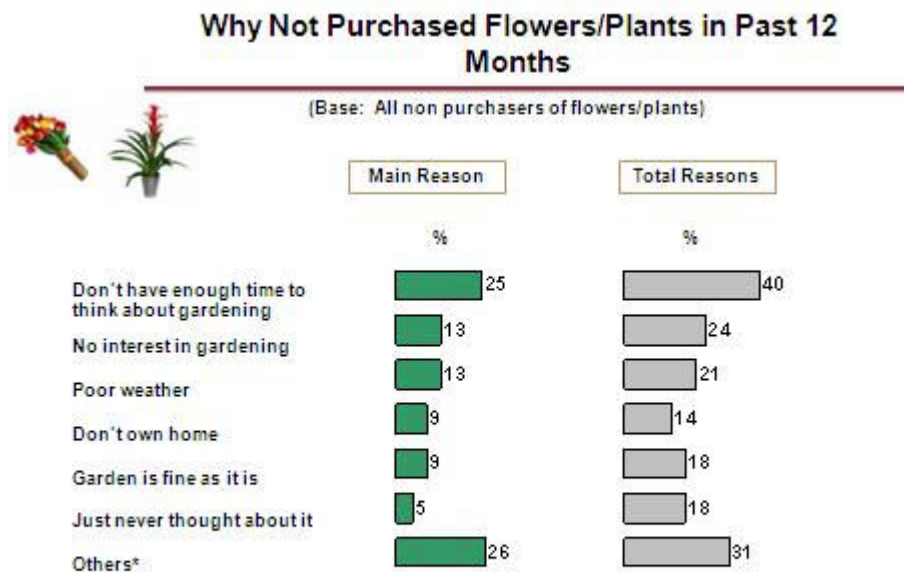
Purchasers of flowers and plants have a wider range of secondary garden roles and uses such as; ‘as a hobby’, ‘for entertaining’, ‘for exercise/healthy/fresh air, etc.’, ‘for eating’, ‘to feel in touch with nature’, and ‘as a play area for children’. All of these were mentioned by circa half of all those who purchased plants and flowers.

Non purchasers of flowers and plants were less likely to consider gardening ‘as a hobby’ and did not see ‘to feel in touch with nature’ as significant a role compared to purchasers for gardens. These non purchasers were more likely to regard the garden as ‘a place for entertaining’, ‘a play area for children’ and a place ‘for exercise/healthy/fresh air, etc.’

Implication

All consumers agree that the garden is a place for relaxation but not all consumers are as actively engaged at all levels with the garden as an interest and in terms of its multiuse possibilities. Landscapers, nurseries and garden centres must understand this and cater for each level of consumer engagement with flowers / plants and gardens.

Reasons for Not Purchasing Flowers/Plants



*All others less than 5%

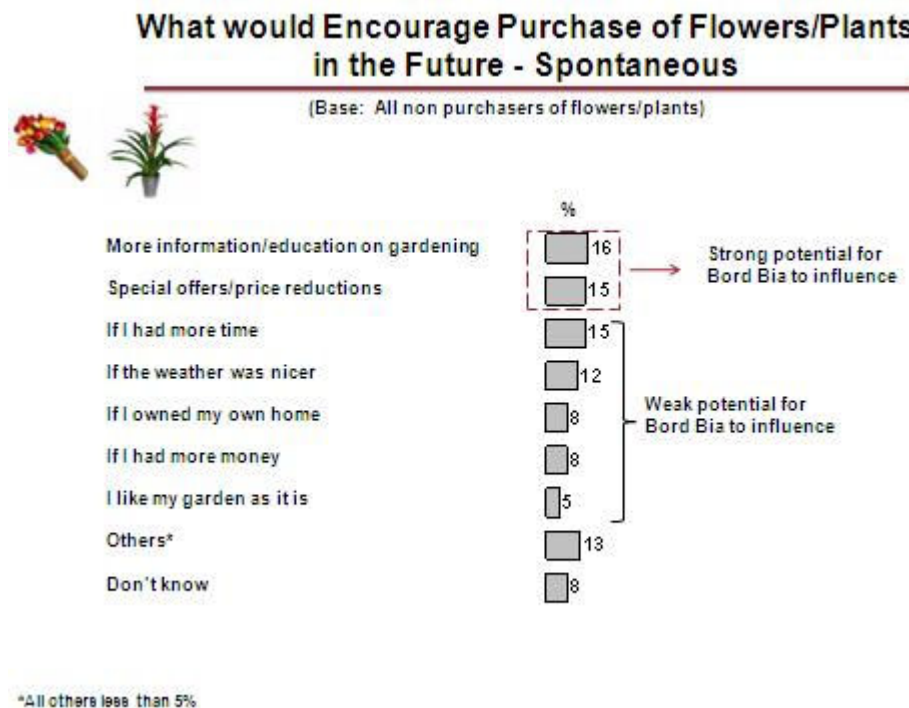
The primary reason that non purchasers of plants and flowers had not purchased in the past 12 months was that they claimed 'not to have enough time to think about gardening'.

One in four (25%) mentioned this as the main reason, and four in ten (40%) mentioned it at all. Secondary reasons for not purchasing flowers and plants were that they 'had no interest in gardening' and 'poor weather conditions' - each of these reasons accounted for just less than one in four of total mentions.

Implication

The main reason cited for not purchasing flowers and plants is 'not having enough time to think about gardening'. This may indicate a real opportunity for the industry to put gardening on peoples agenda through advertising, profiles of gardens and the general on-going promotions of gardening. Exposure to this type of promotion of gardening may just create consumer interest by bringing it up the agenda in terms of all possible activities.

Initiatives that Would Encourage the Purchase of Flowers/Plants for the Future



A wide range of initiatives and factors, if changed were cited by non purchasers of plants and flowers as being likely to encourage them to consider purchasing plants and flowers in the future.

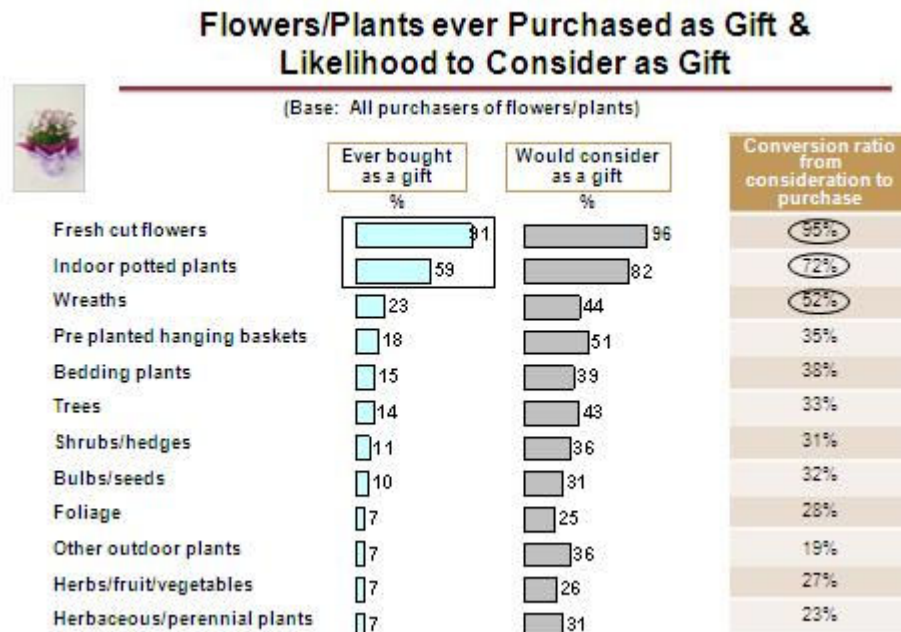
The provision of more information/education on gardening and more special offers/price reductions in retail channels were the primary initiatives that would encourage consumers to buy flowers/plants in the future.

Other factors outside of the control of the industry, however, also had potential to encourage future purchase e.g. if 'people had more time', if 'the weather was nicer', if 'people owned their own home', if people 'had more money'

Implication

The two main initiatives cited by consumers that would encourage them to buy more flowers/plants in the future could be addressed by the industry itself. While price reductions are often controversial and notoriously difficult (to keep all parties in the supply chain content), the provision of more information/education on gardening is a lot more straight forward. This latter need for increased consumer information is in-keeping with the Bord Bia finding that in 2008 most people defined their gardening skill level as either novice level (36%) or intermediate level (52%). As such they were hungry for knowledge about their garden/gardening. In fact, advanced level gardeners only accounted for 12% of all consumers surveyed.

Flowers and Plants as a Gift

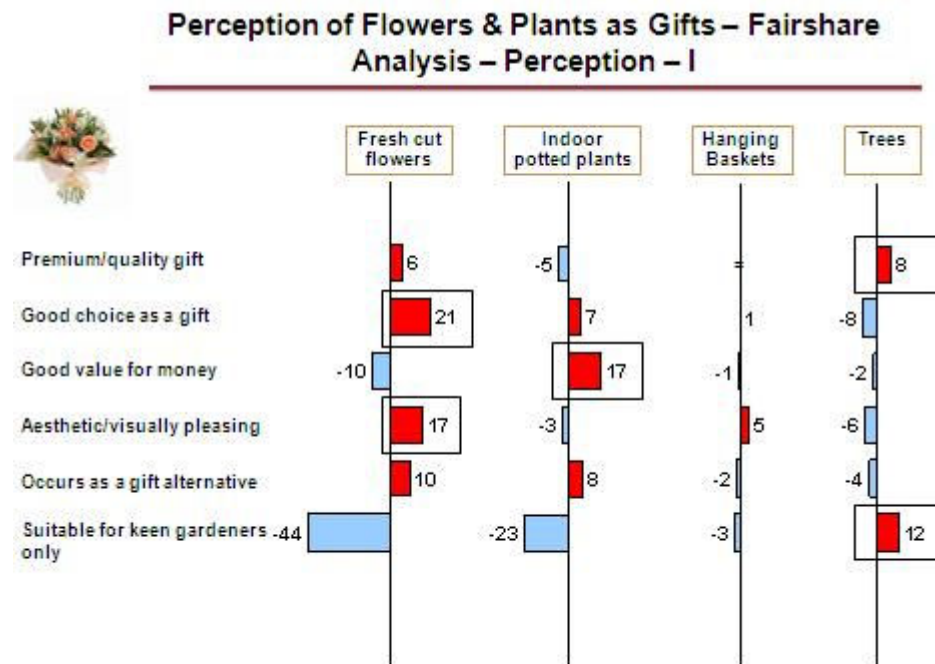


Almost all purchasers of flowers/plants (96%) considered fresh cut flowers as a gift, and 95% of these individuals had followed up on this consideration to actually purchase fresh cut flowers as a gift. With just over nine in ten (91%) of all purchasers of flowers/plants having purchased fresh cut flowers as a gift, this made them the most likely flowers/plants to be bought as a gift. Just under six in ten (59%) had purchased indoor potted plants as a gift, with over eight in ten (82%) considering indoor potted plants as a gift i.e. of all those who would consider potted plants as a gift, 72% of them actually bought potted plants as a gift (which is a 72% conversion ratio from consideration to purchase). For all other flowers/plants less than one in four purchasers of flowers/plants had purchased anything other than fresh cut flowers or indoor potted plants as a gift.

Implication

While fresh cut flowers are well established in the minds of consumers as a possible gift, not so many consider the possibility of bringing family/friends an indoor or outdoor garden plant as a gift. Therein potentially lies an opportunity to develop incremental sales particularly if the latter could be linked to major calendar events e.g. Easter, Christmas, Fathers Day, Mothers Day, etc. (see pages 29 and 30).

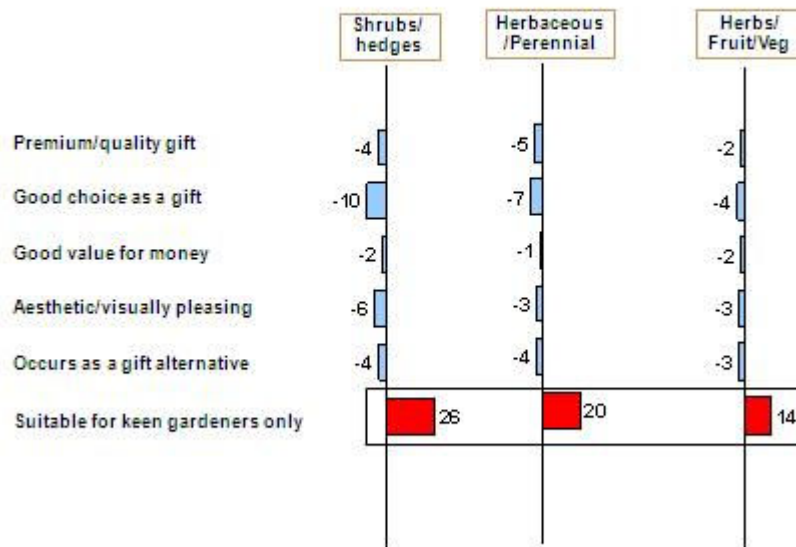
Perception of Flowers & Plants as a Gift



NOTE: Fairshare analysis is a measure (a market research tool) of what a category should score in terms of rating for each of a number of statements, and where it over or underperforms.

Fresh cut flowers were considered universally appealing (not just the preserve of keen gardeners) to be a good choice as a gift and to be aesthetically/visually pleasing. Fresh cut flowers were not particularly considered to be good value for money due to their relative high price and brevity of lasting. Indoor potted plants were thought of as being a good value for money gift and having a broad universal appeal, but not to be same extent as fresh cut flowers. Trees were seen as a gift that was suitable for keen gardeners only and also as a premium quality gift.

Perception of Flowers & Plants as Gifts – Fairshare Analysis – Perception – II

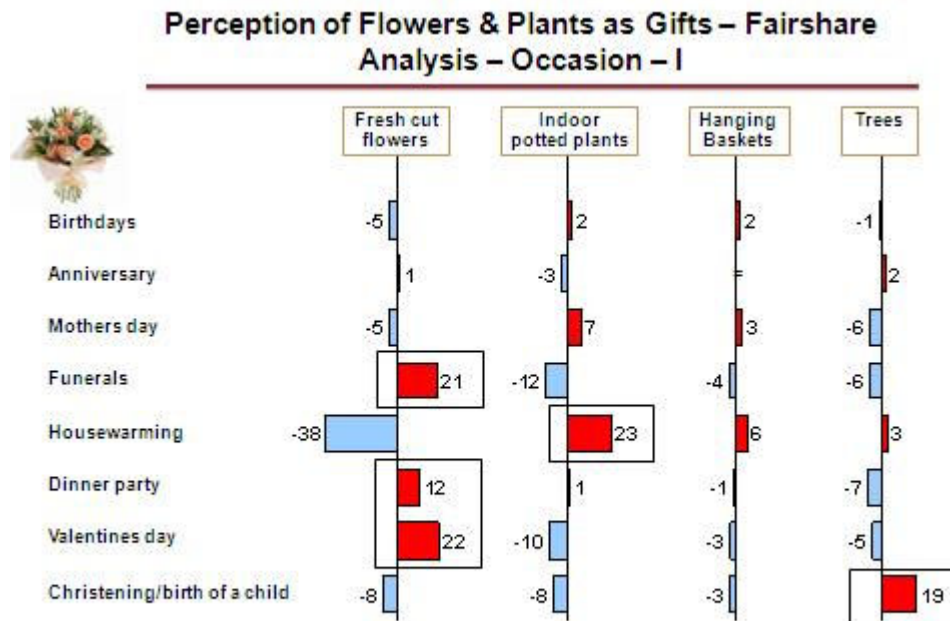


Shrubs/hedges, herbaceous/perennials and herbs, fruit and vegetables were all considered to be a suitable gift for keen gardeners only, above anything else.

Implication

As expected fresh cut flowers came out on top in terms of consumer perceptions of a ‘good choice gift’ and this was followed by indoor plants (but significantly less). While hanging baskets were seen to be visually pleasing they failed to register in terms of suitability as a gift. With the increase in popularity of apartment dwellers and houses of lesser garden space, it is possible there may be some latitude to promote hanging baskets as a colourful addition to the home. Also there would definitely appear to be room to promote ‘trees as a premium gift’ to keen gardeners.

Perception of Appropriate Occasions to Give Flowers & Plants as Gifts



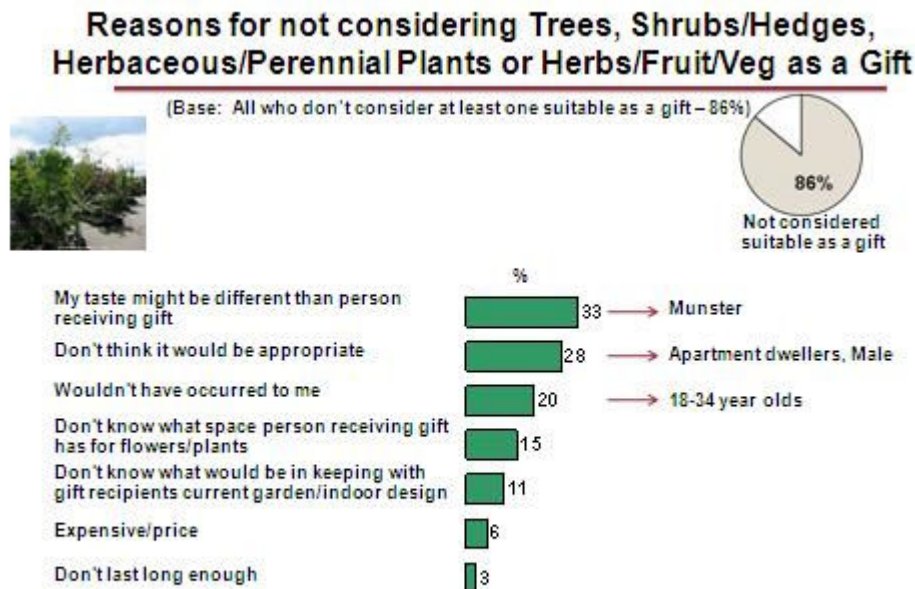
Fresh cut flowers were considered most appropriate as a gift for Valentine's Day, followed closely by funerals and then dinner parties.

Fresh cut flowers were not considered a suitable gift for housewarmings. However, indoor potted plants were regarded as being most appropriate for housewarmings, while trees were seen as a relevant gift on the occasion of a christening (or birth of a child) or to a lesser extent the celebration of a housewarming.

Implication

It would appear that Irish people do not have such a strong tradition of giving flowers and plants as gifts, as many other European Continental countries. Many key occasions were not associated with (or registered only a low level of appropriateness) for the gifting of flowers and plants. This would indicate that there is potentially huge scope to improve in this regard – which primarily must be driven by the industry itself i.e. to put flowers and plants into people's minds as potential gifts for these occasions.

Reasons for Not Considering Particular Flowers/Plants as Suitable Gifts



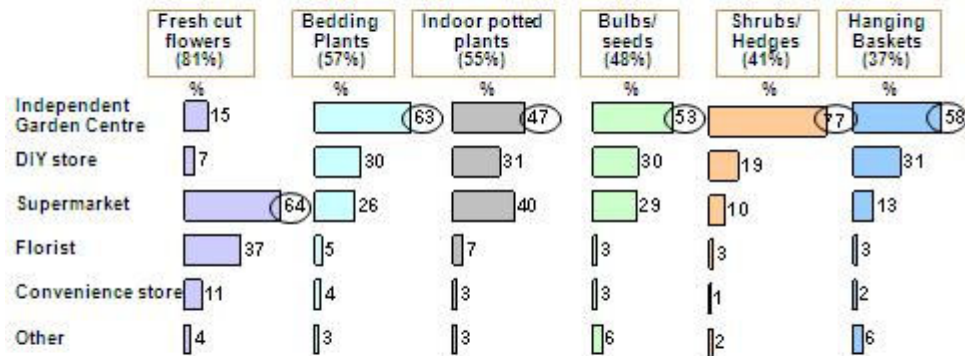
Almost nine in ten (86%) of purchasers of flowers/plants didn't consider at least one of trees, shrubs/hedges, herbaceous/perennials or herbs, fruit and vegetables to be suitable as a gift.

One in three (33%) of these rejectors said they weren't appropriate as their taste might be different from the person receiving the gift. Almost three in ten (28%) said they didn't think they would be an appropriate gift, and the third most commonly cited reason was that it wouldn't have occurred to them at all in the first place (i.e. one in five or 20%).

Retail Channels Preferred to Buy Certain Flower/Plant Types

Flowers/Plants Purchased by Channel – I

(Base: All who purchased relevant flowers/plants)



() = Purchased since Jan 2007

Independent Garden Centres were the most likely channel of purchase for all those who purchased bedding plants, indoor potted plants, bulbs/ seeds, shrubs/hedges or hanging baskets.

For fresh cut flowers which were the plants/flowers purchased by the highest number of plant/flower purchasers, the supermarket was the most likely channel of purchase (64%), followed by a florist (37%) and then by Independent Garden Centres in third place(15%).

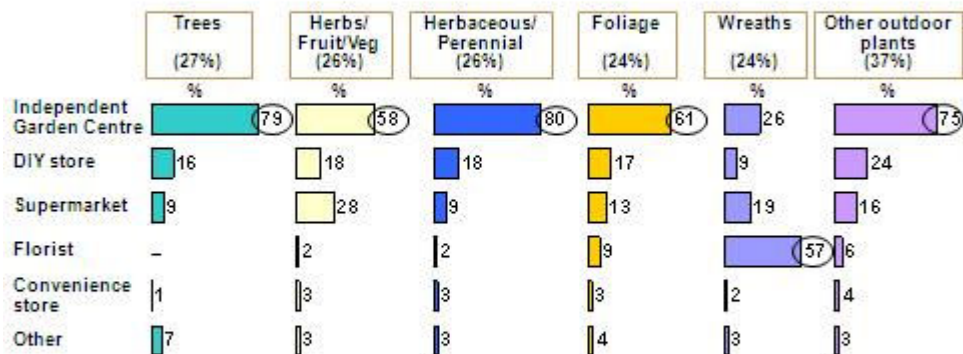
For all other flowers/plants above, DIY Sheds and Supermarkets competed for the second most likely channel for purchase.

Implication

Independent Garden Centres would appear to be the preferred first choice channel for purchasing a wide range of flowers and plants with supermarkets clearly being the most preferred channel to buy fresh cut flowers. While price is cited as the main reason for buying fresh cut flowers through the supermarkets, this is not as big a consideration for bedding plants, indoor potted plants, bulbs/seeds, shrubs/hedges and hanging baskets. This would indicate that consumers still place a high value on perceived expertise, plant quality and range of the latter categories. Independent Garden Centres must continue to differentiate their competitive marketplace offer through excellence in these key areas.

Flowers/Plants Purchased by Channel – II

(Base: All who purchased relevant flowers/plants)



() = Purchased since Jan 2007

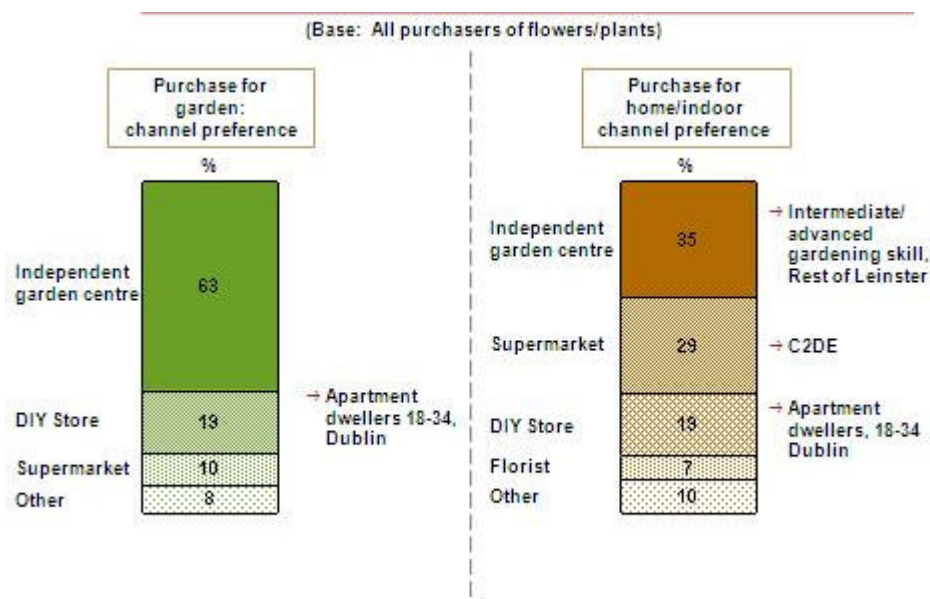
Independent Garden Centres were the most likely channel of purchase for trees, herbs, fruit and vegetables, herbaceous/perennials, foliage and other outdoor plants.

However, this dominance was not continued in relation to purchase of wreaths, where florists were the most likely channel of purchase.

Implication

Independent Garden Centres would appear to be the preferred first choice channel for purchasing a wide range of trees, herbs, fruit and vegetables, herbaceous/perennials, foliage and other outdoor plants. This may further illustrate how consumers place a high value on perceived expertise, plant quality and a wide range of these categories. Independent Garden Centres must continue to differentiate their competitive marketplace offer through excellence in these key areas. Florists are clearly the most preferred channel to buy wreaths, which may be attributed to their specialist artistic knowledge and creative touch.

Retail Channels Preferred for the Purchase of All Flowers/Plants



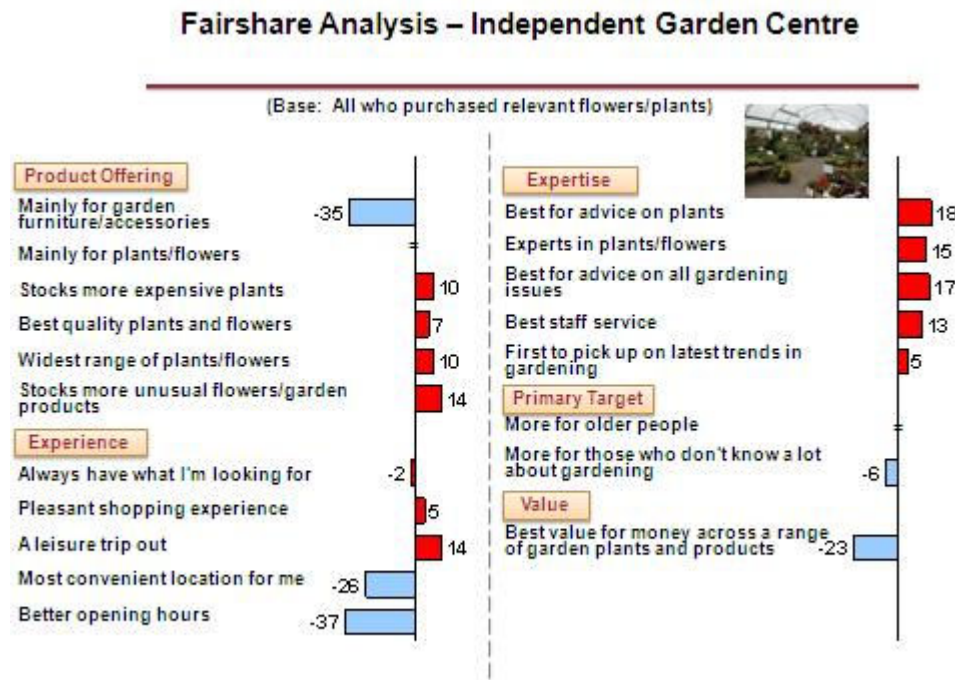
Overall channel preference for purchasing flowers/plants by those who had purchased was Independent Garden Centres, with supermarkets and DIY Sheds competing for the second channel of preference.

For purchases for the garden, almost two in three (63%) preferred the Independent Garden Centre followed in second by DIY Sheds – almost one in five (19%), and then one in ten (10%) preferring the supermarket. For purchase of plants/flowers for the home/indoor, Independent Garden Centres were still the preferred channel but not as overwhelmingly so as for outdoor purchases – just over one in three (35%) preferred Independent Garden Centres for indoor purchases followed in second by supermarkets – just under three in ten – (29%) and then almost one in five (19%) preferring DIY Sheds.

Implication

Consumers clearly prefer Independent Garden Centres for their garden flower/plant purchases, while being more open to buying flowers and plants for inside their home from either supermarkets and DIY Sheds.

Perceptions of Independent Retail Garden Centres



The image of Independent Garden Centres was strongly associated with expertise – they were seen as best for advice on plants and best for advice on all gardening issues.

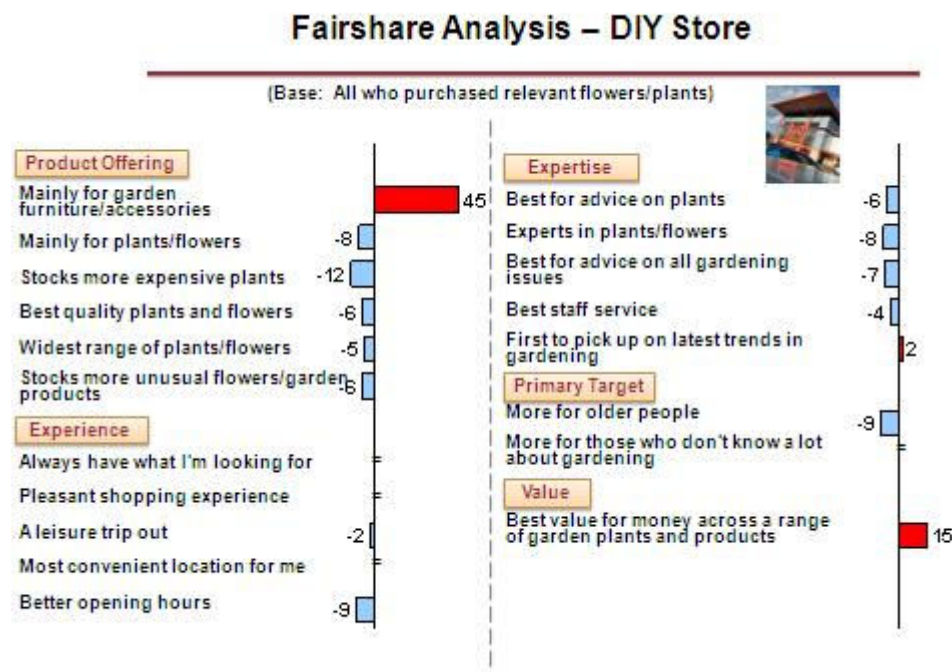
Independent Garden Centres were seen to be the experts in plants and flowers and had a reputation for offering the best staff service.

There were also strong image associations surrounding the product offering – they were seen to stock more unusual/newer flower types and garden products in so doing offering the widest range of plants/flowers while they also enjoyed the reputation for the best quality plants and flowers. Independent Garden Centres were also seen as a place to enjoy a leisure shopping trip ‘out for the day’ and mostly offered a pleasant shopping experience. In terms of downsides; consumers saw Independent Garden Centres as not having better opening hours, not being in the most convenient locations, not offering the best value for money across a range of garden plants and products – they were also believed to stock more expensive plants.

Implication

Currently Independent Garden Centres enjoy a strong positive association with consumers in their reputation as ‘experts’ on plants and flowers. However, this can not be a false expectation for consumers. Independent Garden Centres need to build on this reputation and improve on it, to deliver on this market perception with consumers. Also unlike other retailers of many other types of goods, Independent Garden Centres are uniquely positioned to offer consumers leisure shopping in a relaxed and friendly environment – this is largely attributed to the positive feeling people bring with them when buying plants and walking through plants on visiting garden centres. This latter fact may be linked to an empathy with nature and the environment (for most consumers). Independent Garden Centres need to build on this experience and heighten all aspects of it, through offering colourful visual displays, new garden plants/products and interesting garden centre layouts and features. Having a coffee/tea room or restaurant also adds to the leisure element of the shopping experience.

Perceptions of Retail DIY Stores



DIY Sheds had a strong image of being primarily associated with the purchase of garden furniture and accessories, while enjoying a reputation for offering the best value for money across a narrower range of garden plants and products.

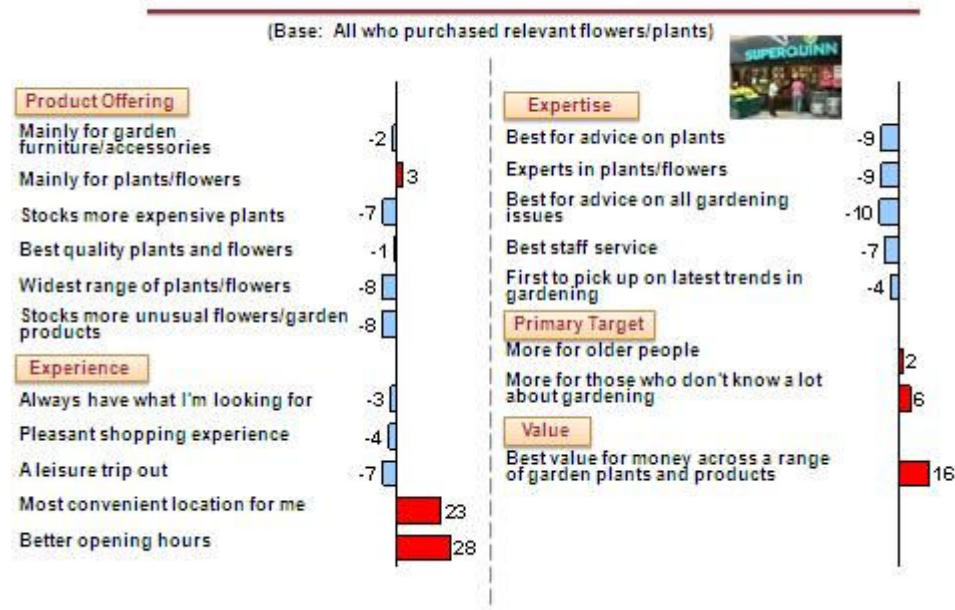
However, a downside of the narrower range of plants being stocked was that they were perceived not to stock more varied or novel plants and flowers (they were seen to only offer a limited/standard range of less expensive plants). DIY Sheds were seen to lack in terms of garden advice and plant expertise in store – they were not regarded as having any particular expertise in plants/flowers or being the best place to go if you needed gardening tips or advice on plants. DIY Sheds also lacked a reputation among consumers for offering ‘best staff service’.

Implication

DIY Sheds enjoy a strong positive association with consumers in their reputation for offering the ‘best value for money’, which in itself is a hugely strong motivator to most consumers. However, DIY Sheds are seen to under perform on many critical aspects of the retail gardening experience – not least being their staffing service and level of expertise available. These latter areas are areas within the control of DIY Shed managers and should be addressed through appropriate training and/or hiring criteria. Clear labels, signage and support leaflets may assist consumers to part compensate, where staff levels are too low or untrained. The depth of range of plants on offer is most likely always going to be down to a competition for floor area/ shelf space within store between all products – as such management retail strategy and ultimately product profitability aspirations will most likely decide this. Highlighting newer or more novel/rare plants may attract more interest in DIY stores, particularly among the cohort of more enthusiastic gardeners.

Perceptions of Supermarkets

Fairshare Analysis – Supermarket



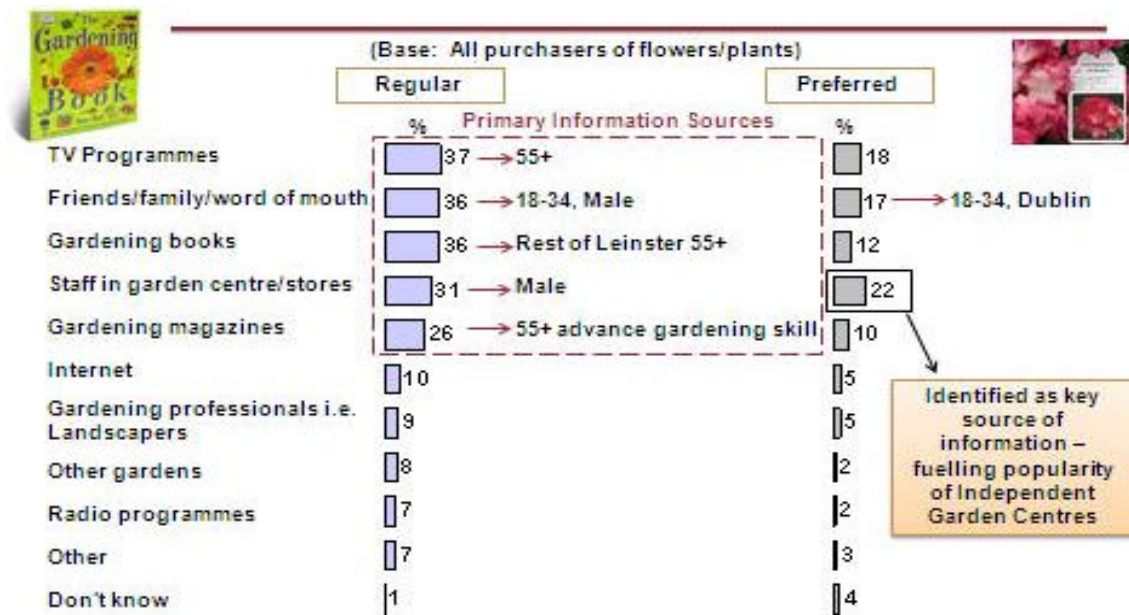
Supermarkets image in relation to purchasing plants and flowers was dominated by convenience and value.

Supermarkets had a strong positive reputation in relation to their better opening hours, their most convenient locations and offering best value for money across a range of garden plants and products. Supermarkets' image was weak in terms of offering 'best for advice on all gardening issues', 'best advice on plants', 'expertise in plants/flowers' and 'best staff service'.

Implications

For supermarkets, convenience and value are strong platforms on which to base a competitive offer, but consumers feel they completely underscore in the whole area of expertise/advice which is an area of critical importance to them (as they openly admit to large gaps in their knowledge of gardening). Clear labels, signage and support leaflets may assist consumers to part compensate, where staff levels are too low or untrained. Also the narrower more limited range offered by supermarkets will always make their offer appear inferior to other more specialist gardening retail channels.

Information Sources on Flowers and Plants



There were a wide range of information sources used by purchasers of plants and flowers.

The main five different sources used regularly to get information were:

- TV programmes
- friends/family/word of mouth
- gardening books
- staff in garden centres/stores
- gardening magazines

Staff in garden centres was the preferred source of information overall, marginally by almost one in four (22%).

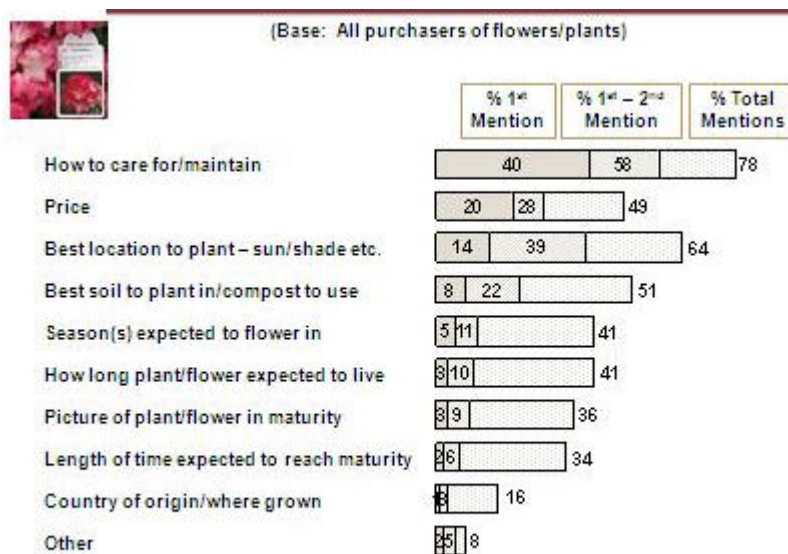
The wide array of information sources used indicated that different gardeners had different preferences for channels, based on the type of information sought and level of detail/interaction required.

Implication

Of all the areas where people say they currently ‘actually get’ their gardening information; it is from staff in garden centres/stores that people say they ‘would prefer to get their information’.

This would indicate a strong desire by the public for ‘the human touch’ to assist them to make informed choices at point of sale when faced with plant alternatives. Consumers admittedly lack expertise in plants and flowers and the ‘plant expert’ is the preferred choice to receive this help.

Information Ideally Displayed on Labels



Purchasers of flowers and plants would have liked to see a wide range of information displayed on plants and flower labels.

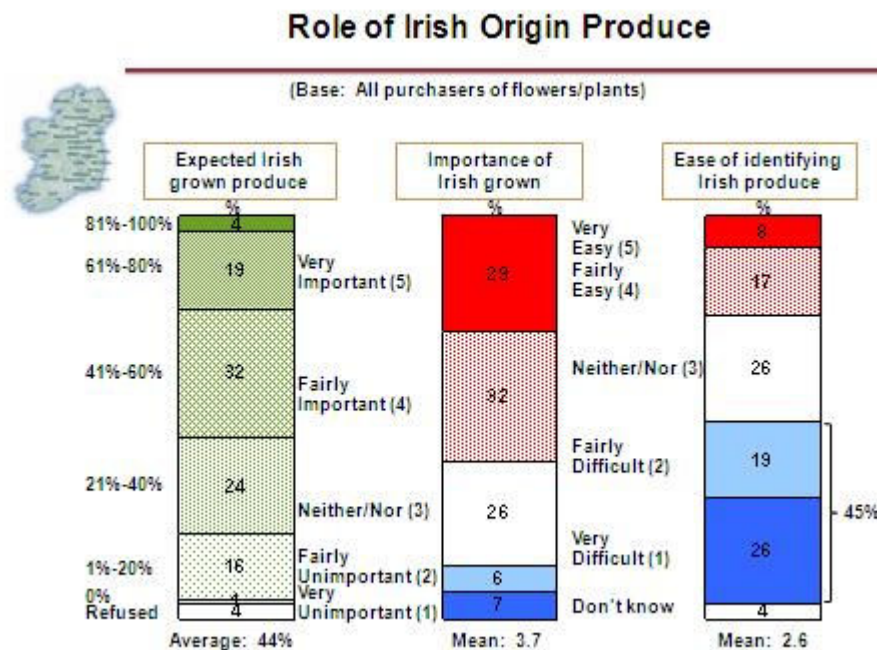
The three most preferred types of information to be carried on labels was;

- How to care for and maintain the plant (40%)
- Price (20%)
- Best location to plant – sun/shade etc. (14%)

Implication

While the three essential pieces of information desired by purchasers of plants and flowers (accounting for almost three in four of all first mentions – 74%) were how to care for and maintain, price and best location to plant – sun/shade, etc. there were many other items (listed above) important to consumers. Nurseries should endeavour to put this information on their labels in agreement/consultation with their retail garden centre customers to give consumers as much information as possible to make choices.

Views on Country of Origin of Flowers/Plants



On average purchasers of flowers and plants expected that 44% of all plants and flowers available in Ireland were Irish grown.

More than six in ten (61%) claimed that flowers and plants being Irish grown was important to them, and yet only one in four (25%) found it easy to identify Irish grown produce – 45% claim that Irish grown purchase was difficult to identify.

Implication

Consumers assume that because a plant is growing and physically sitting on a shelf in a garden centre outlets that it is in fact an Irish plant (many even believe the garden centre outlet themselves grow the plant ‘around the back’). It is therefore important in this high import category to ensure that Irish produce is clearly and easily identifiable by all, especially those six in ten consumers that claim it is important to them.

Initiatives to Encourage Purchase of Irish Grown Flowers/Plants

The most popular initiative consumers suggested to encourage them to buy Irish grown flowers/plants was that there needed to be easier identification of Irish produce (e.g. an Irish flag/logo/emblem).

‘Easier identification of Irish plants/flowers’ was the most popular suggestion cited by four in ten (41%) consumers, while three in four (77%) consumers mentioned it at overall.

The second most popular initiative consumers suggested was ‘more special offers’ on Irish plants/flowers – i.e. seven in ten overall (69%).

The third most popular initiative consumers suggested was ‘highlighting the suitability of Irish plants/flowers to growing in the Irish climate’ – i.e. six in ten (58%).

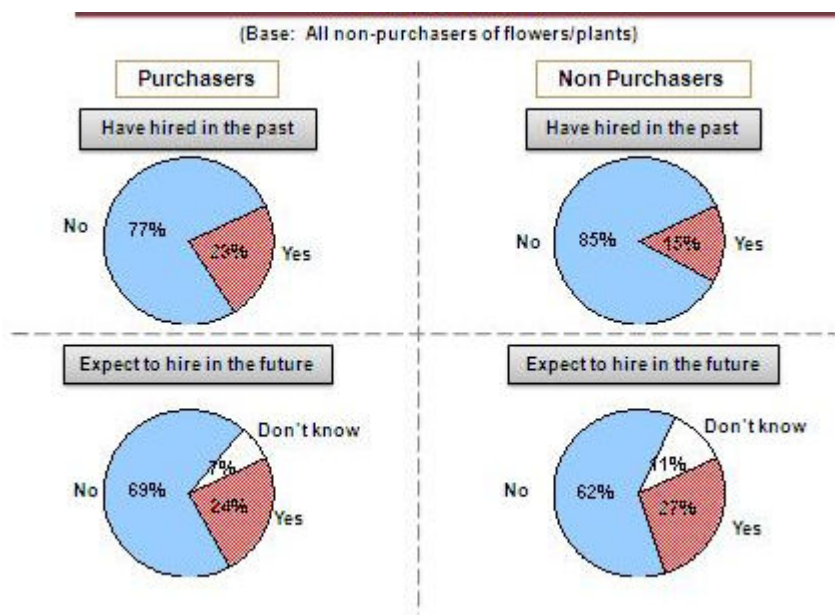
The fourth most popular initiative consumers suggested was having a greater volume presence of Irish plants/flowers - i.e. six in ten (59%)

The fifth most popular initiative consumers suggested was ‘highlighting the quality of Irish plants/flowers’ - six in ten (58%)

Implication

The above is a list of appealing items to encourage Irish consumers towards the greater consideration and purchase of Irish grown plants/flowers. Nurseries and garden centres selling Irish plants should adopt these tactics in their communications with customers.

Incidence of Hiring a Landscape/Gardening Professional



Almost one in four (23%) of purchasers of flowers and plants had hired a landscape/horticultural professional in the past.

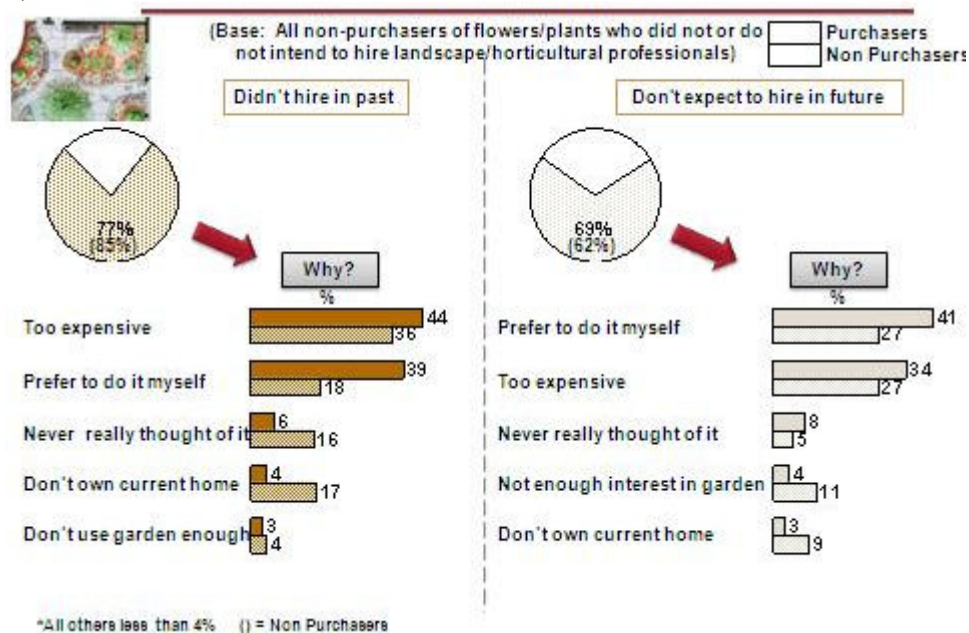
For non purchasers of flowers and plants, this figure was lower – one in seven (15%) had hired. In the future one in four (24%) of flower and plant purchasers expected to hire a landscape/horticultural professional, almost seven in ten (69%) claimed they would not and 7% were undecided. For non purchasers of flowers and plants, more than one in four (27%) expected they would hire a landscape/horticultural professional in the future. Six in ten (62%) would not and one in ten (11%) were unsure.

Implication

Only close to one quarter of the population, who are known to spend money on their garden, have ever hired a landscape/horticultural professional. This figure would indicate a significant potential market, if these people can be persuaded to invest money in proper landscaping/design. The logic here would suggest that if they are willing to spend money on plants/flowers then most likely they would be willing to invest in landscaping/design given the proper proposition/proposal.

Reasons for Not Hiring a Landscape/Gardening Professional

The telephone survey was conducted across 588 consumers (i.e. 497 purchasers and 91 non-purchasers).



The primary reasons why 77% of purchasers of flowers and plants did not hire a landscape/horticultural professional in the past were that they deemed this to be too expensive (44%) or they preferred to do it themselves (39%).

For non purchasers of plants and flowers, the primary reason for not hiring landscape/horticultural professionals in the past (85%) was that it was 'too expensive' (36%). There were a number of secondary reasons that inhibited hiring landscapers/horticultural professionals for non purchasers namely; they 'preferred to do it themselves', they had 'never really thought about it' and they 'didn't own their current home'. These latter three reasons were the most popular 'other reasons' - each of which was mentioned by just under one in five.

The primary reasons for both purchasers (69%) and non purchasers (62%) of flowers and plants for not expecting to hire a landscape/horticultural professional in the future was that they would 'prefer to do it themselves' and that they 'thought it would be too expensive'.

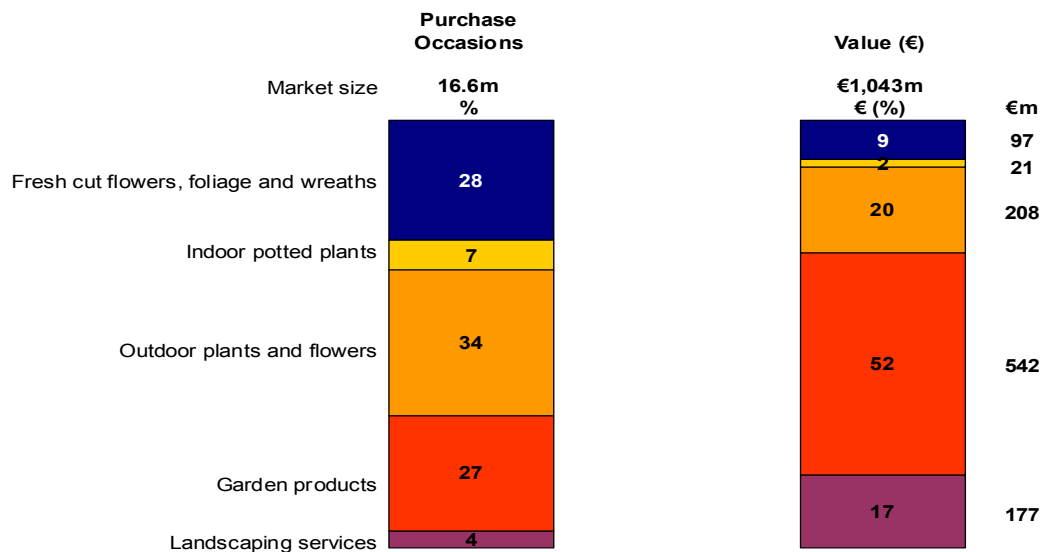
Implication

Clearly landscaping and professional horticultural work has a perception of being very expensive amongst consumers. It is the task of the professional horticultural associations and each individual landscaper/garden designer/landscape architect to get rid of this image and pitch on a 'value for money'/ 'cost versus real benefit' basis. In terms of commissions, consumers need to understand exactly what they are paying for and what benefit it will bring to them – this should allow for a better appreciation of worth for each job.

Appendix 1.

Amenity Market Size Overview

Between April 2007 and April 2008, Bord Bia in conjunction with TNS MRBI conducted 16 one week waves of consumer research across a total of 16,000 adults in the Irish population (16 X 1,000 people per wave), to track the size of the amenity market in Ireland. Interviewing was spread throughout the year to ensure that all peak purchasing periods were included in the research, but in reality purchasing peaks for most categories occurred from the period April to June, which is the main Irish gardening season. To increase the accuracy of the information obtained, purchases only relating to ‘the past week’ were recorded during the ‘recall’ interviews with consumers.



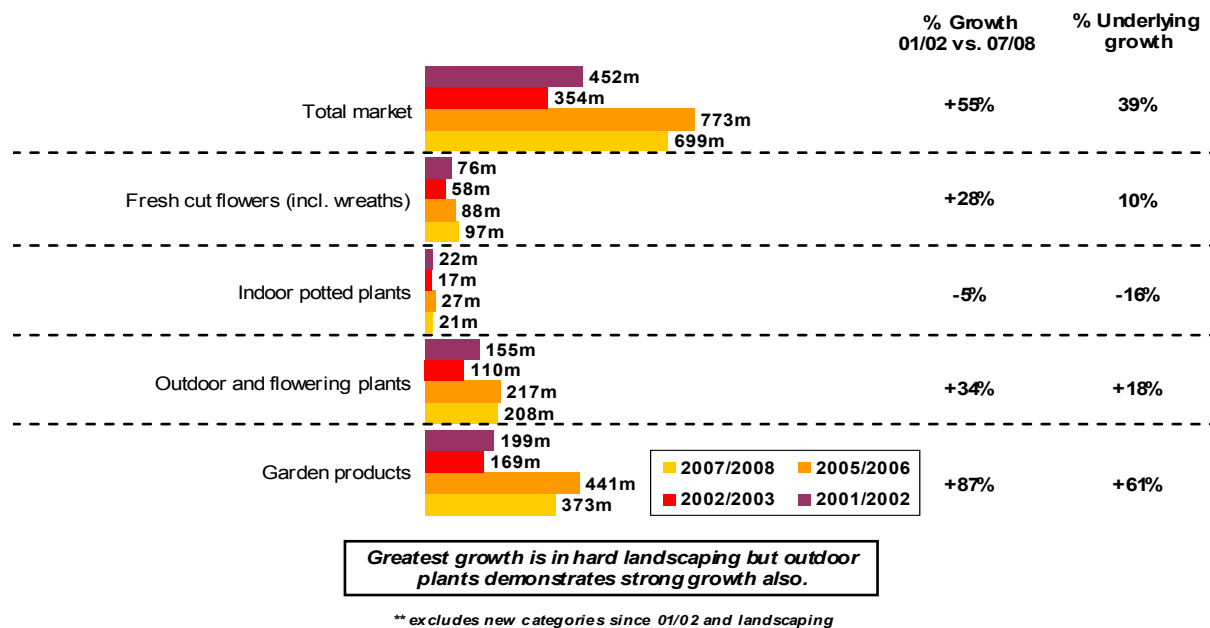
The survey found that amenity market in Ireland was worth just over €1bn, as currently measured for the one year time period falling between April 2007 and April 2008.

In terms of the overall amenity market, 7 in 10 purchase occasions (69%) in the amenity category are for plants and flowers and ‘outdoor’ plants and flowers account for the majority of these (34%) followed by fresh cut flowers, foliage and wreaths (28%). While garden products only account for only 27% of the purchase occasions, they actually account for just over half of the market value (52%) which would indicate that sales in this market segment tend to have a higher value (e.g. garden furniture, tools etc.).

Plants and flowers make up almost one third (31%) of the overall amenity market value, with ‘outdoor’ plants and flowers contributing to 20% of this figure and fresh cut flowers, foliage and wreaths contributing a further 9%.

Amenity Market Growth Rates by Segment

Amenity Market Growth Rates – 2001/2002 Versus 2007/2008



The survey found that amenity market in Ireland was worth just over €1bn (as currently measured), but this reflects additional categories added into the survey, since it commenced back in 2001/2002.

Comparing ‘like with like’ across directly comparable categories (i.e. excluding new categories added since 2001/2002 and landscaping) as measured over the four different one-year time periods, the value of the market was measured at 699m (for these original categories) in 2007/2008. This represents a 55% increase in the market value since 2001/2002. However, this market segment has dipped by 10% since last measured in 2005/2006.

The long term value growth in the market has been driven in particular by hard landscaping products in the garden products sector. The garden products segment of the market was found to have increased in value by 87% in six years i.e. increasing from 199m in 2001/2002 to 373m in 2007/2008. Similar to the overall market, this market segment has dipped in value slightly over the past two years from €441m to €373m.

The outdoor plants and flowers market segment has also demonstrated an impressive increase in value (+34%), over this period particularly in the area of pre-planted products and trees. Similar to the overall market, this market segment has dipped in value slightly over the past two years from €217m to €208m.

The growth of the fresh cut flowers wreaths and foliage market segment has been strong, since the initial survey in 2001/2002, growing by 28% over the six year period. This market segment is currently valued at €97m having increased from €76m in 2001/2002. The poorest performing market segment has been indoor potted plants. This market segment was the only one to register a decrease in sales value over the six year period (-5%). This market segment is currently valued at €21m having decreased from €22m in 2001/2002.

Amenity Market Share – Channel Performance

	2001/2002		2005/2006		2007/2008		% Growth	% Underlying Growth
Value	€452m		€773m		€699m			
Independent garden centre	136m (30%)		240m (31%)		196m (28%)		+44%	+25%
Supermarket	45m (10%)		70m (9%)		77m (11%)		+71%	+48%
DIY stores	54m (12%)		147m (19%)		161m (23%)		+198%	+159%
Independent hardware store	41m (9%)		54m (7%)		63m (9%)		+54%	+34%
Local convenience store	14m (3%)		54m (7%)		63m (9%)		+54%	+34%
Market stalls	9m (2%)		39m (5%)		7m (1%)		-50%	-56%
Florist	63m (14%)		15m (2%)		21m (3%)		+133%	+110%
Discounters	- (-)		62m (8%)		49m (7%)		-22%	-33%
Others	81m (18%)		8m (1%)		21m (3%)		n/a	n/a
			124m (16%)		112m (16%)		+38%	+19%

Comparing the performance of the retail channels across the categories that are directly comparable since the survey commenced in 2001/2002 (i.e. based on a market value of €699m), it was the DIY channel that displayed the greatest expansion in terms of value. The DIY channel now accounts for €161m of the amenity market value. The DIY channel value share across all of the sectors included in this survey increased from 12% in 2001/2002 to 23% in 2007/2008 – an increase of 198% over the period. The DIY channel in particular is benefiting from the increased popularity of hard landscaping products and an apparent consumer shift to DIY garden design; with 29% of all spend on garden products being channelled through the DIY channel (an increase of four percentage points since last measured two years ago).

The Independent Garden Centre market value has grown by 44% in six years, and has just about maintained its market share (28% versus 30%), despite the advances made by the DIY channel. Currently, Independent Garden Centres account for half of all spend on outdoor plants and flowers, but only 39% of all purchase occasions. This suggests that other larger volume channels (especially their main competitors in the DIY channel) may offer more competitive prices, and/or that impulse purchases (which are most likely to be of a lower value), are more common in DIY stores.

Discounters have made a small (3% market share) but significant presence in the amenity market in Ireland and now accounts for €21m of the overall spend in the amenity market.

Amenity Market Share – Category Performance by Channel 2007/2008

	Outdoor & Flowering Plants				Indoor Potted Plants				Fresh Cut Flowers				Garden Products			
	Occasions		Value		Occasions		Value		Occasions		Value		Occasions		Value	
	%		%		%		%		%		%		%		%	
	07/08	05/06	07/08	05/06	07/08	05/06	07/08	05/06	07/08	05/06	07/08	05/06	07/08	05/06	07/08	05/06
Independent garden centres	35	39	51	50	25	27	39	32	6	7	8	10	21	25	16	24
Supermarket	16	18	7	8	27	36	19	24	39	43	25	24	12	15	8	5
DIY stores	23	21	17	14	21	18	23	20	3	3	5	3	34	29	29	25
Independent hardware store	5	3	2	5	2	2	1	2	1	6	1	1	13	12	15	13
Local convenience store	2	7	1	5	1	5	1	4	2	6	2	6	2	6	2	5
Market stalls	3	4	4	2	2	2	2	1	3	4	7	4	1	-	1	1
Florist	2	3	2	5	7	6	6	5	27	30	40	43	1	-	*	-
Discounters	8	2	3	1	11	4	6	6	14	5	7	2	5	2	2	1
Others	7	3	14	10	4	-	4	6	5	1	5	7	12	11	27	26

The DIY channel has grown its market share across all plant and flower categories in terms of number of occasions and value market share.

There has been some contraction of market share for Independent Garden Centres compared with 2005/2006 across all categories, though value share in outdoor plants and flowers has been steady.

Supermarkets have increased their value share of garden products sales, while only marginally for fresh cut flowers. This channel is doing poorly in their sales performance by value for indoor potted plants and outdoor plants and flowers, with both segments experiencing a slight contraction of sales.

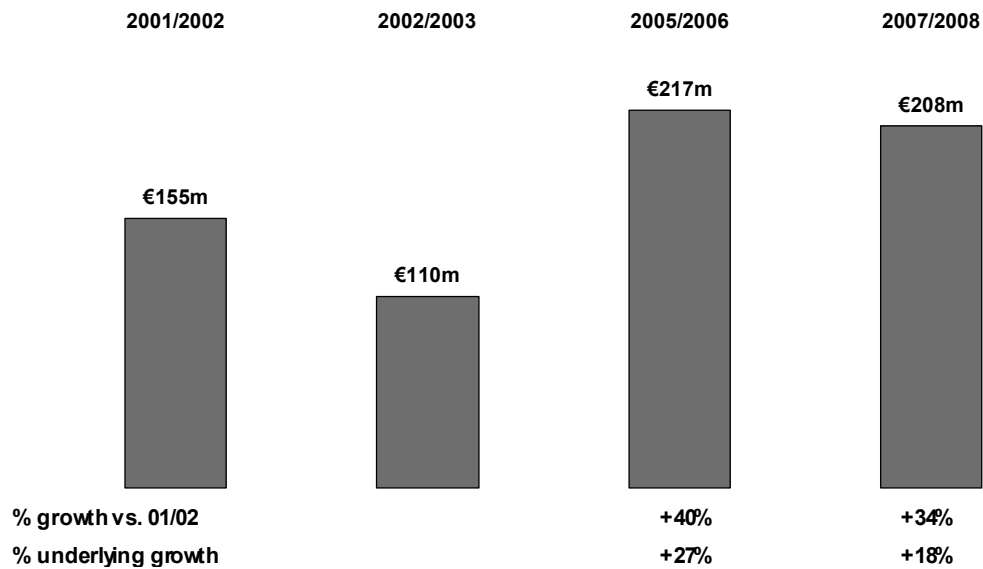
Discounters share in outdoor plants and flowers purchase occasions has grown from only 2% in 2005/2006 to 8% in 2007/2008. However their real gains in terms of market share has been in purchase occasions in fresh cut flowers market, having grown sales from 5% in 2005/2006 to 14% in 2007/2008.

Outdoor Plants and Flowers Market Segment – Definition

- Definition includes:
 - Pre-planted hanging baskets or outdoor containers
 - Bulbs/seeds for planting (e.g. daffodils, sweet pea, lettuce seed)
 - Trees
 - Shrubs/hedges
 - Bedding plants (e.g. lobelia, petunias, pansies)
 - Herbaceous plants (plants that die down in the winter and grow again in the summer e.g. lupins, chrysanthemums, hostas)
 - Herbs/fruit/vegetables (for planting)
 - Other outdoor plants (e.g. ornamental grasses, bamboo, ferns, water plants)

The above definition was used for the 2007/2008 period research. Since the commencement of the research an adjustment was made within this market segment. In 2002/2003, the segment heading ‘flowering plants’ was replaced with two headings namely ‘herbaceous plants’ and ‘bedding plants’.

Value of the Outdoor Plants and Flowers Market Segment



The growth rate in the outdoor plants and flowers market segment has been strong, since the initial survey in 2001/2002, growing by 34% over the six year period – it is currently valued at €208m. This value has dipped marginally in the last two years.

	2001/2002	2002/2003	2005/2006	2007/2008	% growth (01/02 vs. 07/08)	% underlying growth
	€m	€m	€m	€m		
Total	155	110	217	208	+34%	+18%
Hanging baskets/outdoor containers	9	11	19	29	+220%	+190%
Bulbs/seeds for planting	18	15	22	19	+5%	-10%
Trees	34	15	47	61	+79%	+56%
Shrubs/hedges	39	29	45	40	+2%	-11%
Flowering plants	32	20	n/a	n/a	n/a	n/a
Bedding plants	n/a	4	39	23	n/a	n/a
Herbaceous plants	n/a	2	10	10	n/a	n/a
Herbs/fruit/vegetables	9	7	16	15	+66%	+44%
Other outdoor plants	11	7	19	11	=	-14%

The growth rate in the outdoor plants and flowers market segment has been strong, since the initial survey in 2001/2002, growing by 34% over the six year period – it is currently valued at €208m. Value growth has been driven by higher prices for hanging baskets, outdoor containers and trees (see average spend per purchase occasion chart).

The strongest growth rates experienced across this market segment were for:

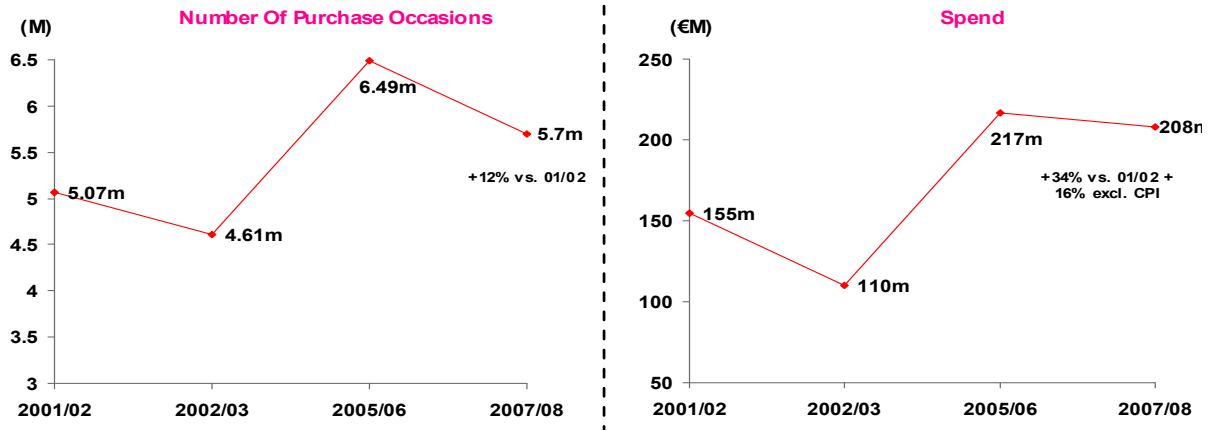
- hanging baskets and outdoor containers (+220% growth rate since 2001/2002)
- trees (+79% growth rate since 2001/2002)
- herbs/fruit/vegetables (+66% growth rate since 2001/2002)

Quarterly Trend for Purchasing Outdoor Plants and Flowers

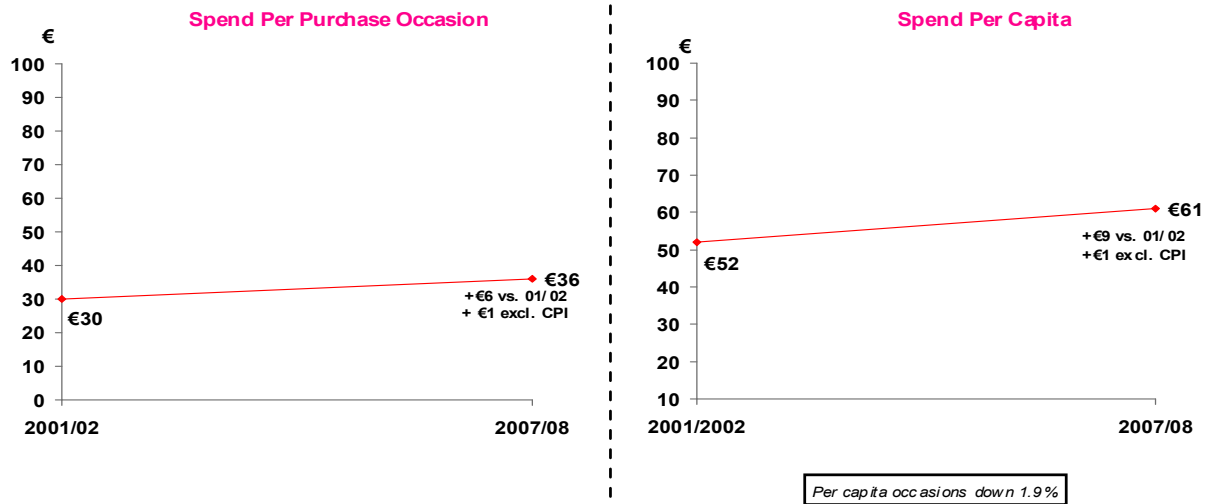
	Full Year 2005/2006	Full Year 2007/2008	Apr-June 2007	Jul-Sept 2007	Oct-Dec 2007	Jan-Apr 2008
	%	%	%	%	%	%
Hanging baskets/outdoor containers	4	4	7	5	2	2
Bulbs/seeds for planting	8	6	7	3	6	6
Trees	3	2	3	2	2	2
Shrubs/hedges	4	3	6	3	2	2
Bedding plants	9	6	11	5	4	3
Herbaceous plants	3	2	4	2	1	1
Herbs/fruit/vegetables	5	4	7	3	2	4
Other outdoor plants	4	2	3	1	1	1

The average (past week) incidence of purchasing outdoor plants and flowers from April 2007 to April 2008 would indicate that purchasing peaks for most categories from April to June (which affirms that this period is the peak gardening season in Ireland).

Purchase Occasions & Spend for Outdoor Plants and Flowers



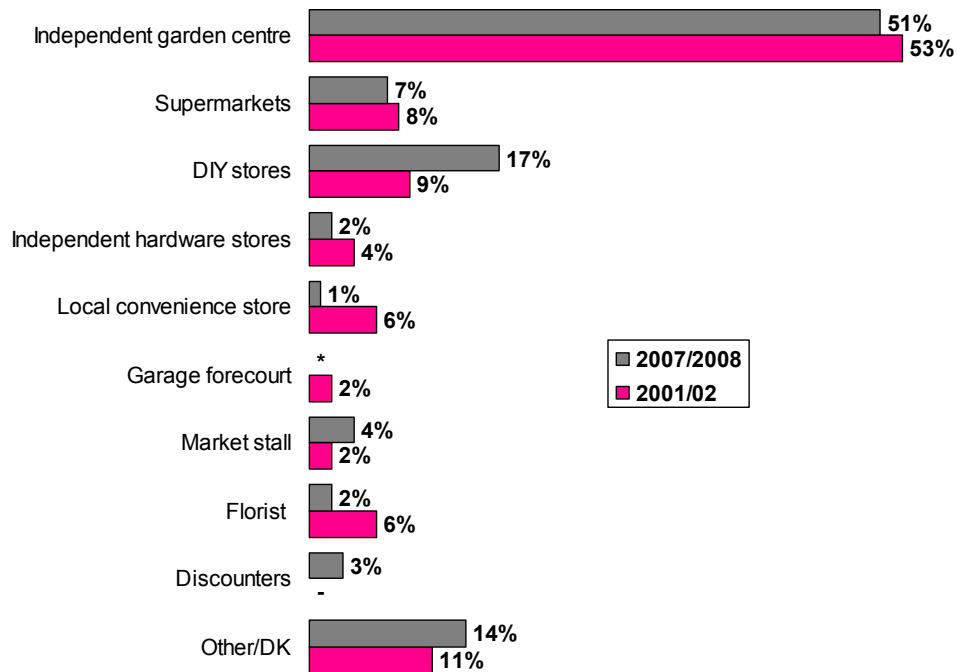
Spend Per Purchase Occasion & Spend Per Capita for Outdoor Plants & Flowers



Average Spend Per Purchase Occasion

	2005/2006	2007/2008
■ Hanging baskets/outdoor containers	€32	€39
■ Bulbs/seeds for planting	€17	€16
■ Trees	€118	€135
■ Shrubs/hedges	€64	€69
■ Bedding plants	€24	€21
■ Herbaceous plants	€25	€29
■ Herbs/fruit/vegetables	€18	€16
■ Other outdoor plants	€32	€37

Outdoor Plants and Flowers Market Segment – Channel Share



In terms of where outdoor plants and flowers are bought there has been strong recent growth in the DIY market channel, while Independent Garden Centre's market share has contracted slightly (from 53% in 2001/2002 to 51% in 2007/2008). However, Independent Garden Centre's have done well to hold their market share in a rapidly growing market at a time when DIY channels have been opening many outlets nationwide.

Outdoor Plants and Flowers Market Segment – Category Performance by Channel 2007/2008 (purchase occasions)

	Total Category	Hanging Basket s/ Outdoor containers	Bulbs/ seed s for planting	Trees	Shrubs/ hedges	Bedding plants	Herbaceous plants	Herb s/ fruit/ vegetables	Other Outdoor plants
	%	%	%	%	%	%	%	%	%
Independent garden centre	35	31	27	51	53	34	44	25	38
Supermarket	16	14	17	7	8	12	12	31	12
DIY stores	23	32	25	13	22	28	23	13	27
Independent hardware store	5	6	8	4	1	5	3	6	3
Local convenience store	2	1	1	-	1	1	1	4	2
Market stalls	3	2	1	3	3	4	3	5	2
Florist	2	4	1	2	1	2	2	1	2
Discounters	8	4	12	11	6	7	7	8	6
Others	7	7	7	8	6	6	5	7	8

More than a third of outdoor plants and flowers are purchased through Independent Garden Centres, followed in second place by DIY channels. Currently, Independent Garden Centres account for half of all spend on outdoor plants and flowers, but only 39% of all purchase occasions. This suggests that other larger volume channels (especially the main competitor in the DIY sector) may offer more competitive prices, and/or that impulse purchases – which are most likely to be of a lower value - are more common in DIY stores. The Independent Garden Centre's strengths lie in such products as trees, shrubs and hedges with half of all purchases of these products being made through this channel. In addition, 3 in 10 purchases of hanging baskets are routed through Independent Garden Centres, on a par with DIY stores. Nonetheless, the DIY sector has gained a greater share of consumer activity (as measured by purchasing occasions of outdoor plants and flowers) in the past two years, increasing market share from 27% to 32%.

Motivation for Purchase within Outdoor Plants and Flowers Market Segment 2007/2008

	Hanging Basket s/ Outdoor containers	Bulbs/ seed s for planting	Trees	Shrubs/ hedges	Bedding plants	Herb aceous plants	Herb s/ fruit/ veget ables	Other Outdoor plants
	%	%	%	%	%	%	%	%
For the home	40	20	14	13	21	15	43	17
For the garden	48	72	77	82	72	75	48	70
Special occasion (birthday, Valentines etc.)	2	1	2	1	3	1	1	2
Gift	7	3	3	2	3	7	4	6
Other	3	4	4	2	2	2	4	4

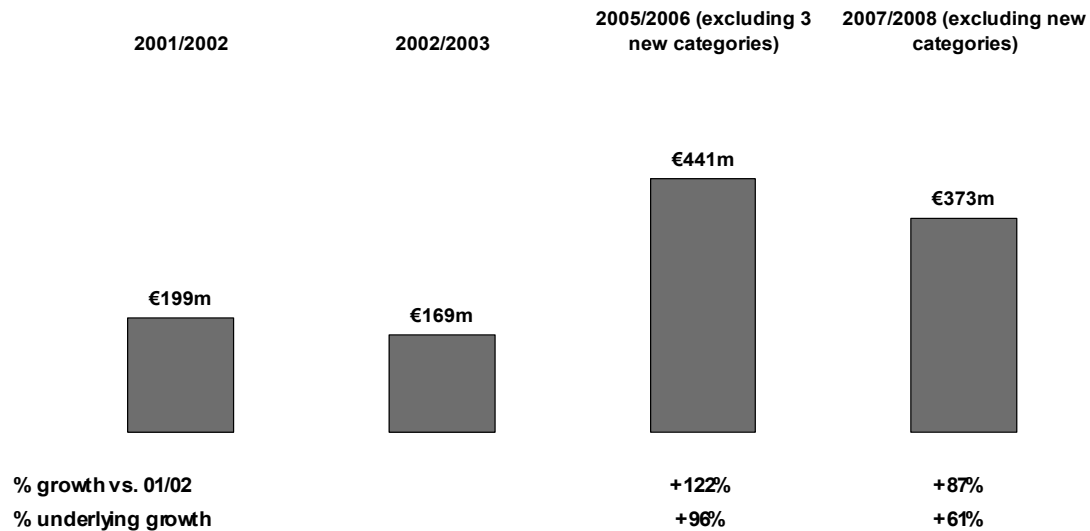
Based on purchase occasion analysis, outdoor and flowering plants are primarily bought for the home and for garden and would not be primarily given as a gift or bought for a special occasion.

Garden Products Category – Definition

- Definition includes:
 - Garden treatment (e.g. feed, fertiliser and pesticides)
 - Peat/bark/soil treatment (e.g. wood chippings/bag of peat/manure)
 - Garden accessories (e.g. sculptures, fountains, pots, containers)
 - Paving/decorative stones
 - Decking
 - BBQ equipment
 - Garden furniture (e.g. tables, chairs, outdoor heaters)
 - Gardening tools/equipment (e.g. spades, forks, hoes, trimmers, lawn mowers)
 - Garden structures (incl. Sheds, glass houses, lean-to's, pergolas, tunnels, cloches)
 - Garden trellising, fences
 - Other hard landscaping products (sleepers, bricks etc.) new 2007.

The above definition was used for the 2007/2008 period research. Since the commencement of the research a number of category additions have taken place most notably in 2002/2003 the 'gardening tools' category was added, in 2005/2006 'gardening structures' and 'trellising/fences' were added. In 2007/2008 the sub-category 'other hard landscaping products' was added.

Value of the Garden Products Market Segment



The growth rate in the garden products market segment has been strong, since the initial survey in 2001/2002, growing by 87% over the six year period – it is currently valued at €373m which is almost double in size from 2001/2002.

	2001/2002	2002/2003	2005/2006	2007/2008	% change	% underlying change
	€m	€m	€m	€m		
Garden treatment	19	13	32	24	+26%	+9%
Peat/bark/soil treatment	17	8	23	27	+59%	+35%
Garden accessories	37	20	76	24	-35%	-42%
Paving/decorative stones	47	46	106	105	+123%	+91%
Decking	29	30	78	78	+169%	+129%
BBQ equipment	14	18	40	28	+100%	+75%
Garden furniture	37	34	86	87	+135%	+102%
Gardening tools/equip.	N/A	19	50	48	N/A	N/A
Gardening structures	N/A	N/A	41	42	N/A	N/A
Garden trellising/fences	N/A	N/A	44	34	N/A	N/A
Other hard landscaping products	N/A	N/A	N/A	44	N/A	N/A

Value growth has been driven by increased sales of decking, garden furniture, paving/decorative stones, and barbeque equipment. As such, the strongest growth rates experienced across this market segment were for:

- decking (+169% growth rate since 2001/2002)
- garden furniture (+135% growth rate since 2001/2002)
- paving/decorative stones (+123% growth rate since 2001/2002)
- barbeque equipment (+100% growth rate since 2001/2002)

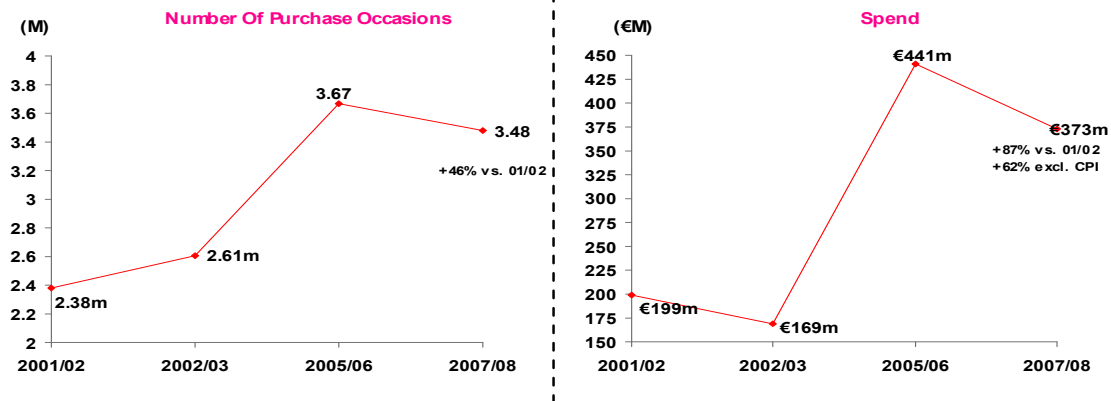
It would appear that garden treatment products are not growing as rapidly as other categories, while garden accessories have experienced some decline over the period.

Quarterly Trend for Purchasing Garden Products

	Full Year 2005/2006	Full Year 2007/2008	Apr-Jun 2007	Jul-Sept 2007	Oct-Dec 2007	Jan-Apr 2008
	%	%	%	%	%	%
Garden treatment	7	5	6	6	4	4
Peat/bark/soil treatment	6	5	8	5	4	4
Garden accessories	4	2	3	3	2	2
Paving/decorative stones	2	2	2	2	2	1
Decking	1	*	1	*	*	*
BBQ equipment	2	1	3	2	1	*
Garden furniture	2	2	4	2	1	1
Gardening tools/equip.	5	3	4	3	3	2
Gardening structures	1	1	*	1	1	*
Garden trellising/fences	1	1	2	1	1	*
Other hard landscaping products	n/a	1	1	1	1	1

The average (past week) incidence of purchasing garden products from April 2007 to April 2008 would indicate that purchasing peaks for most categories from April to June (which affirms that this period is the peak gardening season in Ireland).

Purchase Occasions & Spend for Garden Products



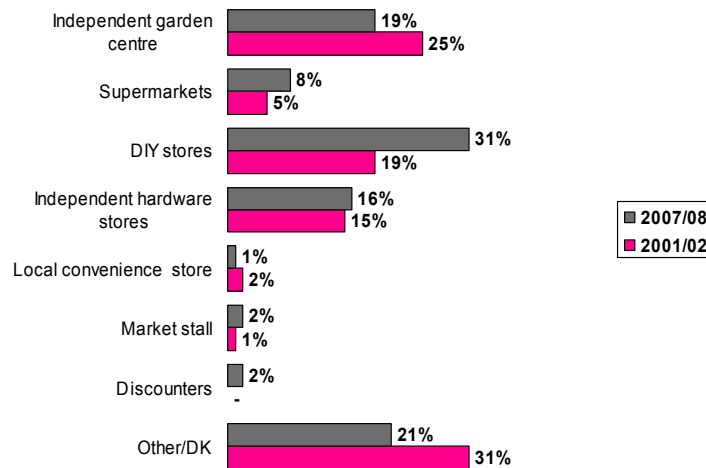
Spend Per Purchase Occasion & Spend Per Capita for Garden Products



Average Spend Per Purchase Occasion for Garden Products

	2005/2006	2007/2008
■ Garden treatment	€32	€25
■ Peat/bark/soil treatment	€29	€28
■ Garden accessories	€109	€53
■ Paving/decorative stones	€353	€354
■ Decking	€780	€709
■ BBQ equipment	€100	€82
■ Garden furniture	€215	€240
■ Gardening tools/equip.	€71	€82
■ Gardening structures	€410	€385
■ Garden trellising/fences	€220	€177
■ Other hard landscaping products	n/a	€344

Garden Products Market Segment – Channel Share



DIY store share has grown to 31%

* Excludes landscaping and new categories

In terms of where garden products are bought there has been very strong recent growth in the DIY market channel, who now account for +31% of the market, while Independent Garden Centre's market share has contracted slightly (from 25% in 2001/2002 to 19% in 2007/2008). Supermarkets and discounters have also managed to capture market share in this expanding/high growth market.

Garden Products Market Segment – Category Performance by Channel 2007/2008 (purchase occasions)

	Total Category %	Garden treatment %	Peat/bark/soil treatment %	Garden accessories %	Paving/Decorative stones %	Decking %	BBQ equipment %	Garden furniture %	Garden-ing tools/ Equipment %	Garden-ing structures %	Garden Trellis-ing/ fences %	Other Hard Land-scaping %
Independent garden centre	21	25	29	23	28	10	2	12	11	37	21	16
Supermarket	12	11	9	15	3	3	33	26	8	9	5	7
DIY stores	34	36	30	38	27	36	36	33	38	25	33	23
Independent hardware store	13	15	11	7	15	28	8	8	18	7	20	25
Local convenience store	2	1	2	1	*	2	5	1	2	-	2	2
Discounters	5	3	6	6	1	-	8	4	8	4	1	1
Others	13	9	12	10	26	20	8	15	15	18	19	25

More than a third of all garden product purchases are through the DIY channel followed in second place by Independent Garden Centre's. This popularity of the DIY channel extends across all market sub-segments. Independent Garden Centre's exhibit relatively higher share for garden structures, paving and peat/soil treatment, but accessories, including decking, garden furniture and BBQ equipment are more likely to be bought through DIY stores: one third of these purchases go through this channel. Supermarkets are significant players in the BBQ market, attracting a further third of consumer purchasing occasions. One quarter of all garden furniture purchases are also channelled through the supermarket trade.

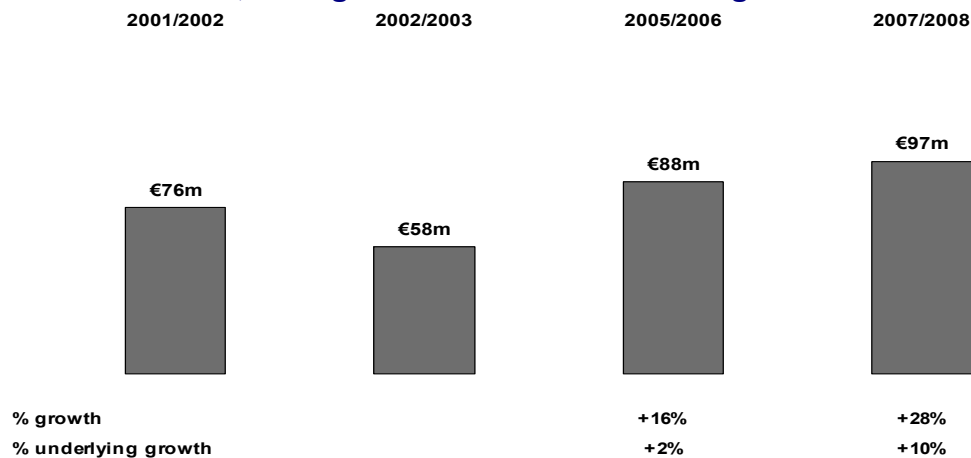
Motivation for Purchase within Garden Products Market Segment 2007/2008

	Garden treat- ment %	Peat/ bark/soil treatment %	Garden access- ories %	Paving/ decorative stones %	Deck- ing %	BBQ equip- ment %	Garden furniture %	Gardening tools/ equipment %	Gardening structures %	Garden trellising / fences %	Other hard landscaping products
For the home	10	12	17	24	23	37	20	19	18	16	23
For the garden	86	82	70	64	61	40	69	72	75	80	70
Special occasion (birthday, Valentines etc.)	1	2	5	5	*	4	*	1	4	*	*
Gift	1	2	4	3	6	10	6	4	3	3	3
Other	2	3	4	3	10	8	4	4	*	1	3

Based on purchase occasion analysis, garden products are primarily bought for the home and for the garden and would not be primarily given as a gift or bought for a special occasion.

Fresh Cut Flowers, Foliage and Wreaths Market Segment

Fresh Cut Flowers, Foliage and Wreaths Market Segment Value



The value of the fresh cut flowers wreaths and foliage market has been strong, since the initial survey in 2001/2002, growing by 28% over the six year period – it is currently valued at €97m.

Fresh Cut Flowers, Foliage and Wreaths Market Segment Value - Breakdown

	2001/2002	2002/2003	2005/2006	2007/2008	% growth	% underlying growth
	€m	€m	€m	€m		
Fresh cut flowers	62	47	70	69	+11%	-3%
Wreaths	9	7	9	11	+22%	+6%

Fresh cut flowers accounts for the majority of spend in this category.

Fresh Cut Flowers, Foliage and Wreaths – Purchase Occasions by Channel 2007/2008

	Fresh cut flowers %	Wreaths %
Independent garden centre	3	12
Supermarket	43	11
DIY stores	1	7
Local convenience store	2	3
Garage forecourt	1	-
Market stalls	3	5
Florist via phone	1	9
Florist direct	26	42
Discounters	17	-
Others	4	12

Consumer behaviour in relation to the fresh cut flowers market has changed considerably since the benchmark survey in 2001/2002. 6 in 10 purchases of fresh cut flowers are now made through supermarkets and discounters or conversely now only 1 in 4 purchases of fresh

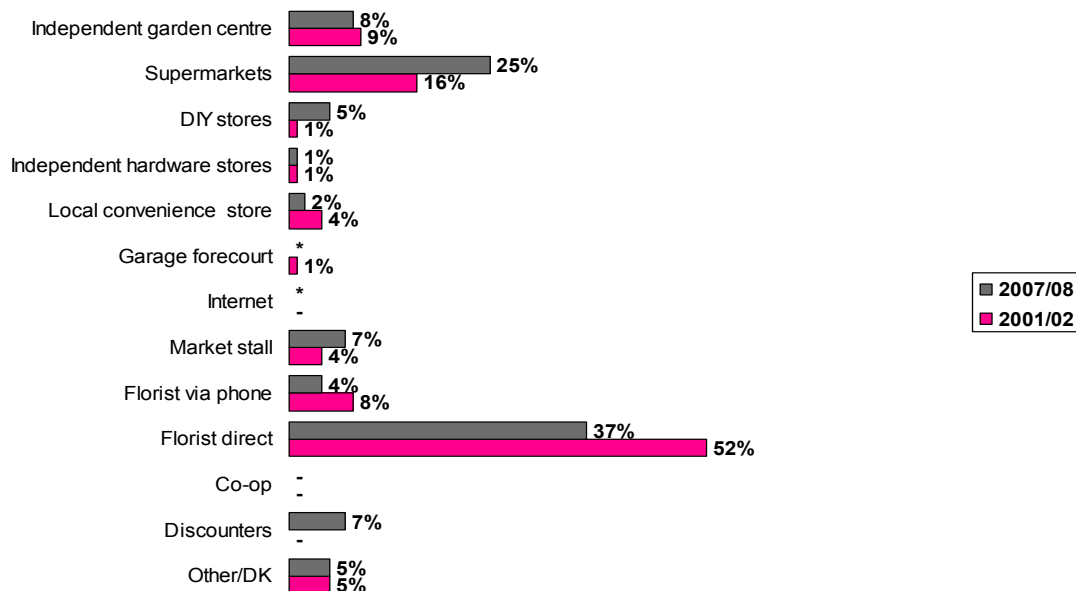
cut flowers are made from a florist. Florist are still the first choice channel to purchase wreaths.

Fresh Cut Flowers, Foliage and Wreaths – Average Spend Per Purchase Occasion

	2005/2006	2007/2008
Fresh cut flowers	€17	€19
Foliage	€23	€28
Wreaths	€30	€31

The main driver of value growth in the category is the cut foliage.

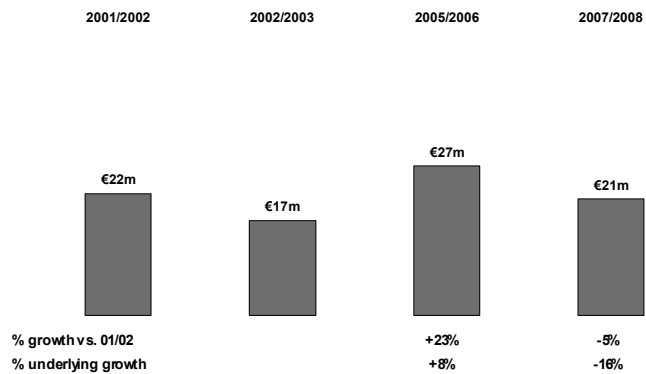
Fresh Cut Flowers, Foliage and Wreaths – Value Spend by Channel



While florists continue to be the main channel for purchase of fresh cut flowers, wreaths and foliage, it would appear that they are losing significant market share to supermarkets and discounters. Supermarkets now account for 25% of the total market value of this sector, while discounters have emerged strongly in this market (from a very low base) and now account for 7% market share of sales by value.

Indoor Potted Plants Market Segment

Indoor Potted Plants Market Segment Value



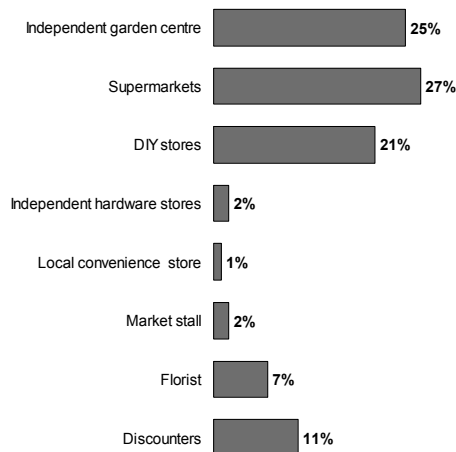
The value of the indoor potted plant category has declined by 5% since 2001/2002.

Indoor Potted Plants Market Segment Value – Quarterly Trend

	Full Year 2005/2006	Full Year 2007/2008	Apr-Jun 2007	Jul-Sept 2007	Oct-Dec 2007	Jan-Apr 2008
	%	%	%	%	%	%
Indoor potted plants	8	5	7	5	4	4

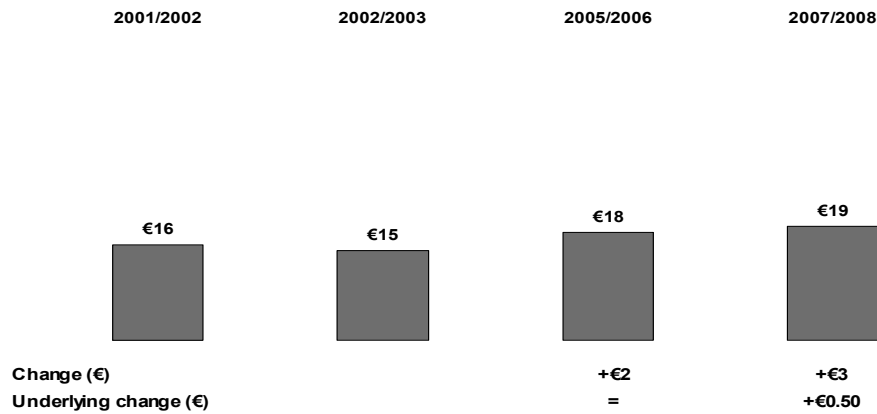
In 2007/2008 the purchase of indoor potted plants peaked in the April to June period.

Indoor Potted Plants – Purchase Occasions by Channel 2007/2008



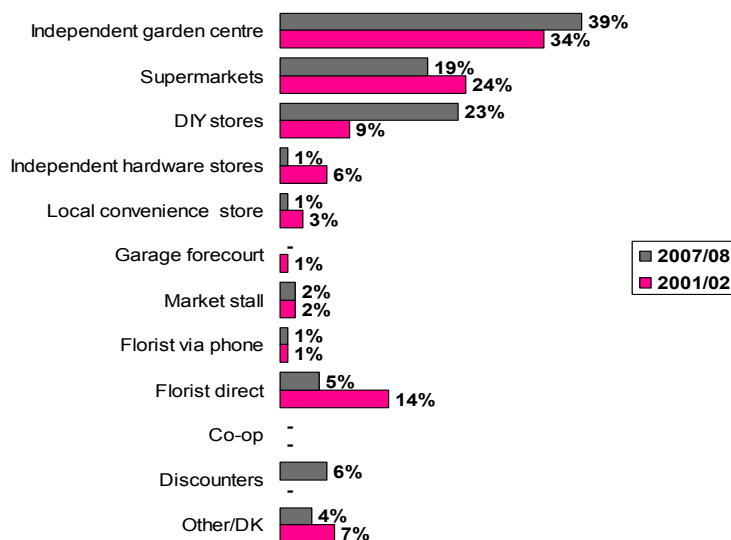
Supermarkets, Independent Garden Centres, DIY channels and increasingly discounters are the most popular channels to purchase indoor potted plants.

Indoor Potted Plants – Average Spend Per Purchase Occasion



In 2007/2008 the average spend per purchase occasion on indoor potted plants is €19.

Indoor Potted Plants – Value Spend by Channel



Independent Garden Centres hold 39% of the value of indoor potted plants in a relatively static market. DIY channels have increased their sales while supermarkets share has declined.