



Irish Food Board

**Trade, Consumer & Business Views of Quality  
Landscape & Design in Ireland**

**October 2007**

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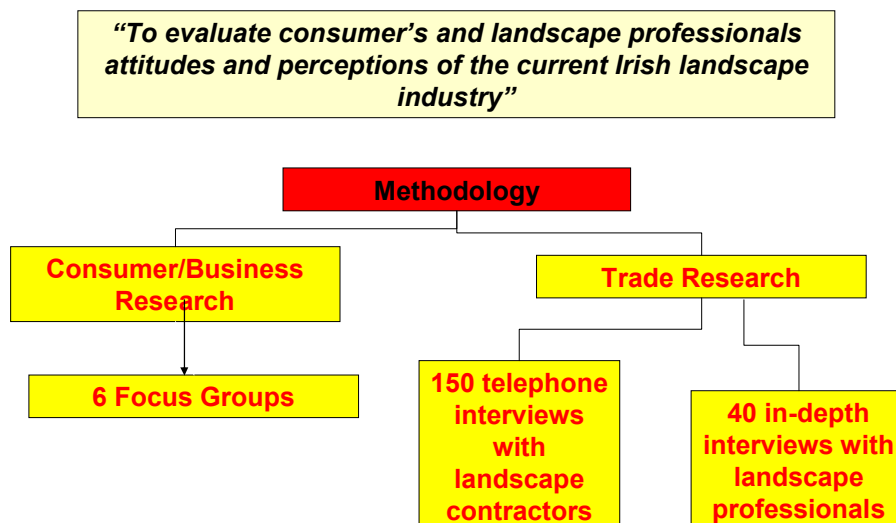
## Introduction – Research Method

In 2007, Bord Bia engaged Research Solutions (market research consultants), to undertake research on their behalf into the landscape industry in Ireland. The primary aim of the research was to understand the different viewpoints in terms of what people understood ‘quality landscape and design’ to be. The research work also sought to explore both consumer/businesses views and in particular the landscape trades’ own perceptions of their industry and how to improve it.

As a matter of practicality of conducting the research, it was broken down into 3 distinct phases namely:

1. 40 in-depth interviews with landscape professionals
2. 6 consumer focus groups
3. 150 telephone surveys with landscape contractors

## Research Objective and Methodology



### 1. In-Depth Interviews with Landscape Professionals

A series of 40 qualitative in-depth interviews were conducted throughout the landscape industry as follows:

Horticultural Trade		Planners/Property Agents	
Professional landscapers	4	Auctioneers/valuers	3
Interior landscape contractors	2	Builders/developers	3
Maintenance contractors	2	Commercial architects	2
Landscape architects	4	Local authorities/planning department	4
Garden designers	4	Property management companies	2
Sports turf professionals	2	National Roads Authority	1
Representation bodies	3	Banks and lending institutes	2
Artificial plant vendors	2		
<b>Total</b>	<b>23</b>		<b>17</b>

### 2. Consumer/Business Focus Group Research

Six focus groups split between the members of the public and the wider business community were held to explore issues in relation to the use of landscape services in Ireland. The composition of these focus groups is given in the table below.

Group	Customer Type	Status	Age	Life Stage	Location
1	Commercial	Rental Market	N/A	N/A	Dublin
2	Commercial	Potential Buyers/Movers	N/A	N/A	Mullingar
3	Commercial	Business owners	N/A	N/A	Cork
4	Residential	Potential Buyers	27-40	Family formation	Dublin
5	Residential	Rental Market	20-25	Young singles/couples	Cork
6	Residential	Current Owners	30-50	Family formation	Mullingar

### 3. Telephone Survey with Landscape Contractors

A questionnaire was designed and administered via a fifteen minute telephone interview with a researcher. 150 landscape contractors were interviewed to gauge their views on landscaping and the landscape industry. A number of key attitudes to the industry were explored as part of the research. A key focus for this phase of the research was to try to arrive at an estimation of the value of the landscape industry in Ireland by building up an individual profile of each company and grossing up values to arrive at an estimate of the industry value. **This part of the research was the only quantitative element of the entire research project, permitting Bord Bia to produce figures and statistical data. All figures generated in this report are calculated based on the telephone interviews.** Additional insights were driven by the qualitative focus groups and in-depth interviews.

### **Presentation of Results**

While the majority of people spoken to in this survey were landscape contractors, a range of other landscape professionals and clients/consumers opinions were sought to complete the overall picture.

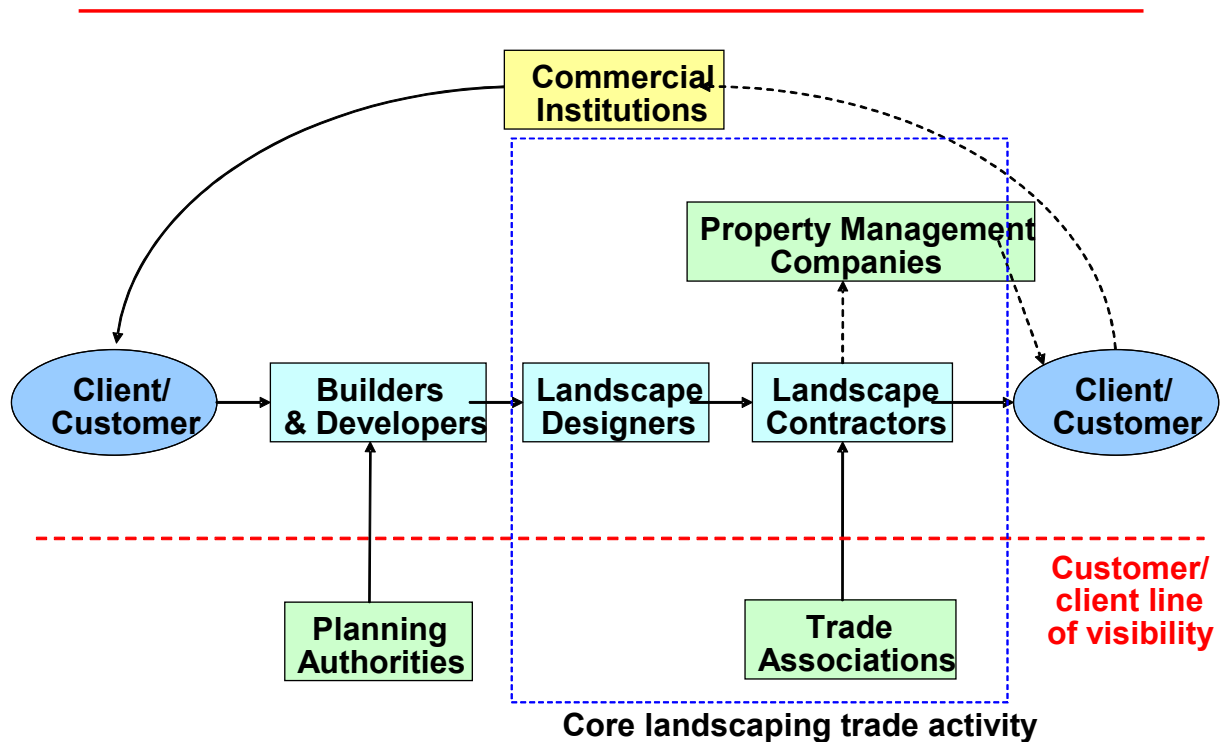
The report is written up not only to present the key research findings but also to present an analysis of the implications of the research findings, in so doing hopefully presenting opportunities for all landscape professionals.

For further information on this research report contact:

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# Quality Landscape & Design – Trade Interviews

## Landscape Market Interaction



### Background to Landscape Market in Ireland

The landscape market in Ireland is composed of a complex network of different professionals that interact at different levels with the client/customer and between themselves. The client/customer provides the catalyst that brings about the need for landscaping services and is ultimately the end user. The client/customer relies on commercial institutions (namely financial institutions, auctioneers and property valuers) to provide funding for landscape projects and to place a monetary value on landscaping. Builders and developers (including commercial architects) design and decide the wider scope of new and existing developments including landscaping. These builders and developers are subject to the guidelines and regulations established by planning authorities and National Government.

The core of landscaping trade activity in Ireland is carried out by landscape designers, landscape architects and landscape contractors servicing a mix of business from private, commercial and public clients/customers

These landscape professionals are supported by trade associations and sometimes management companies. Landscape designers are usually either approached directly by the client/customer or else are sub-contracted by builders and developers. Their role is to plan and design the specific landscaping elements of a project. Professional landscape contractors account for the majority of companies in the industry and most of them are generalist in the type of work they undertake, however there are a number of landscape contractors who focus

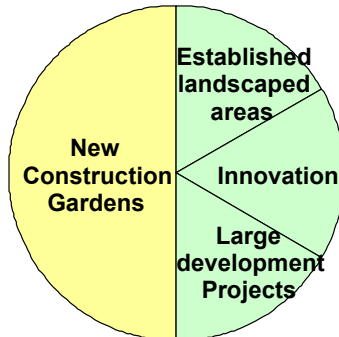


on particular aspects of landscaping such as maintenance contractors, interior/artificial contractors and sports turf professionals. Landscape contractors carry out the actual landscaping of the area, as agreed with their clients and normally provide all the materials necessary to do the job. Some landscape contractors can provide a design element for clients/customers, but typically for smaller jobs being not as specialised in this area as landscape designers. Trade associations exist across the range of landscape professions and are typically voluntary associations supporting the business needs of their representative group, operating on a part time basis. Finally, property management companies are often responsible for the upkeep of the landscaping on larger commercial areas.

### **Implication**

To fully understand the meaning of quality in terms of landscaping it is essential to appreciate the variety of different stakeholders and the views they may hold across the industry. The complex and diffuse nature of the landscape industry means it is difficult to put in place measures where “one size fits all” as each component of the overall industry oftentimes has quite distinct business needs.

## Core Areas Driving Growth of Landscaping



- ♦ **New construction primarily housing has driven the recent growth in the industry**
- ♦ **Fear that housing slowdown will impact business levels**
  - Less housing to landscape
  - Builders/developers pre-landscaping themselves to cut costs
- ♦ **Established homes looking to update landscape and large projects are not seen to have experienced as accelerated growth as new construction or to be under the same threat**
- ♦ **Innovative solutions in landscaping are very limited in growing the market**
  - Hard to get new materials
  - Consumer appetite is for more basic designs

There was widespread trade opinion that the volume of landscaping business had in general experienced an increase in recent years. The area which was believed to have driven this growth the most was from newly constructed houses (with associated private gardens). In this sense the recent high demand for landscaping services was seen as a product of the recent growth boom in the housing and construction industry.

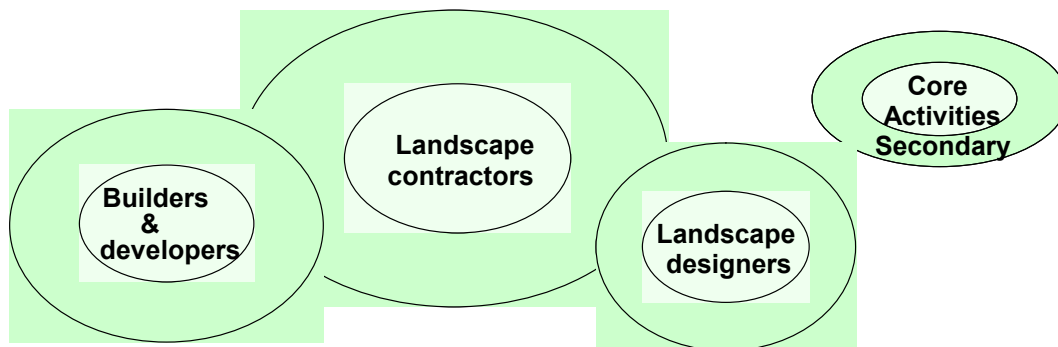
**The strength of the Irish housing market and construction industry in the general economy directly relates to the demand for landscaping services**

The recent slowing within the housing and construction industry was expected to bring about lower levels of growth in the landscaping industry. With this expected slowdown, landscape professionals envisaged a shift in focus of their business towards more large development projects and commercial construction, along with refocusing on established landscaped areas (specifically established private gardens). These two areas were to some extent seen as the 'steady business' of the industry and were to some extent viewed as more immune to economic upswings/downswings. The other area that was expected to be an important focus for growing the landscape market moving forward was 'innovation and development' of new products/techniques that appealed to less traditional/conservative clients/customers. However, it was acknowledged that this type of work was more atypical and generally speaking Irish clients tend to have a preference for more basic designs.

### Implication

Landscape professionals need to have a balance of clients/customers that avoids over reliance on any one area of the business they are in.

## Landscapers Concerns of Cannibalisation if Market Slows



- ♦ **As the confidence in the sustainability of the current growth becomes less certain, landscape professionals are more conscious of the threat of other builders and other professionals eroding their core activities of business**
  - **Landscape contractors concerned over builders undertaking more hard landscaping.**
  - **Landscape designers concerned over landscape contractors undertaking more design work**

Evidence among the trade suggested a level of anticipated cannibalisation from other service providers who directly preceded or followed them in the supply chain. The particular concern was that in the recent climate of strong growth in the construction industry everyone had more than enough work to keep them busy by focusing purely on their own core activities. As landscape growth declines (in line with a drop off in growth in the construction industry) landscape professionals and other related professionals were expecting that there may no longer be sufficient business to keep them at full capacity operating within their core activities. The extension of this expectation was that trade professionals would look to closely related secondary activities, which they had the ability to carry out, to use any spare capacity. However, oftentimes a secondary activity to one trade professional was a core activity to another.

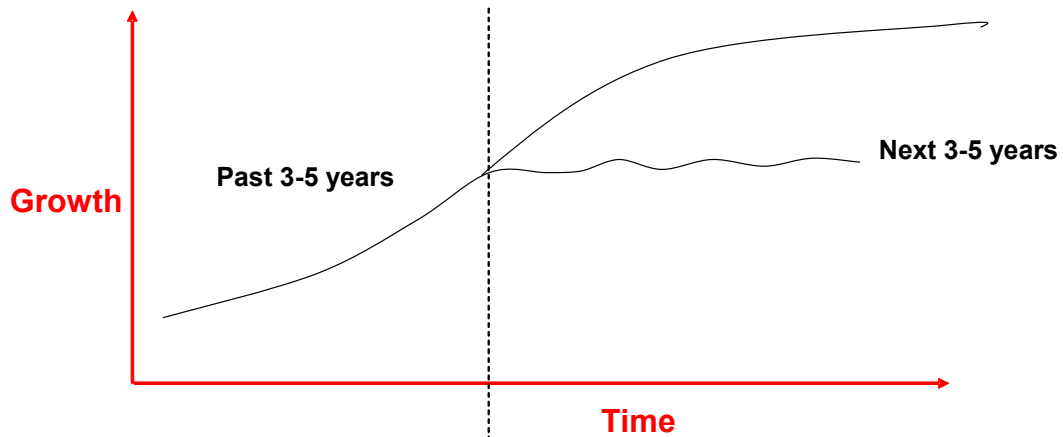
The expected result is that as the market slows that more trade professionals will try to compete in a wider range of related services.

Landscape contractors were concerned that builders and developers would begin to undertake more hard landscaping themselves, which was traditionally sub contracted to landscape professionals and landscape designers were concerned that landscape contractors would begin to offer more in the way of design services and so on. As certainty and confidence in the market deteriorates then the fear of cannibalisation has become more real.

### Implication

The service offered by each landscape service provider must significantly add value to a clients business to give them a reason to stay loyal to that operator. Without some aspect of providing a unique service being offered then price becomes the lowest common denominator.

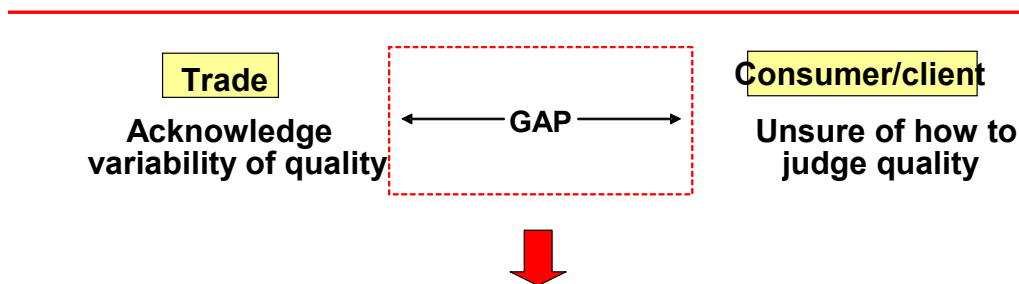
## Landscape Market Growth into the Future



- ♦ Widespread agreement that industry has experienced significant growth in the past 3-5 years.
- ♦ Uncertainty as to whether growth will continue at the same pace. Most predict a stable mature phase of activity.

Among all landscape professionals there was a strong agreement that in the past 3-5 years the landscape market as a whole had experienced strong growth, however expectations for future growth to continue at a similar rate was uncertain. The majority of landscape professionals felt that the housing slowdown would play an important role in the stabilisation of current market levels, rather than additional significant growth or decline.

## Quality Standards Gap



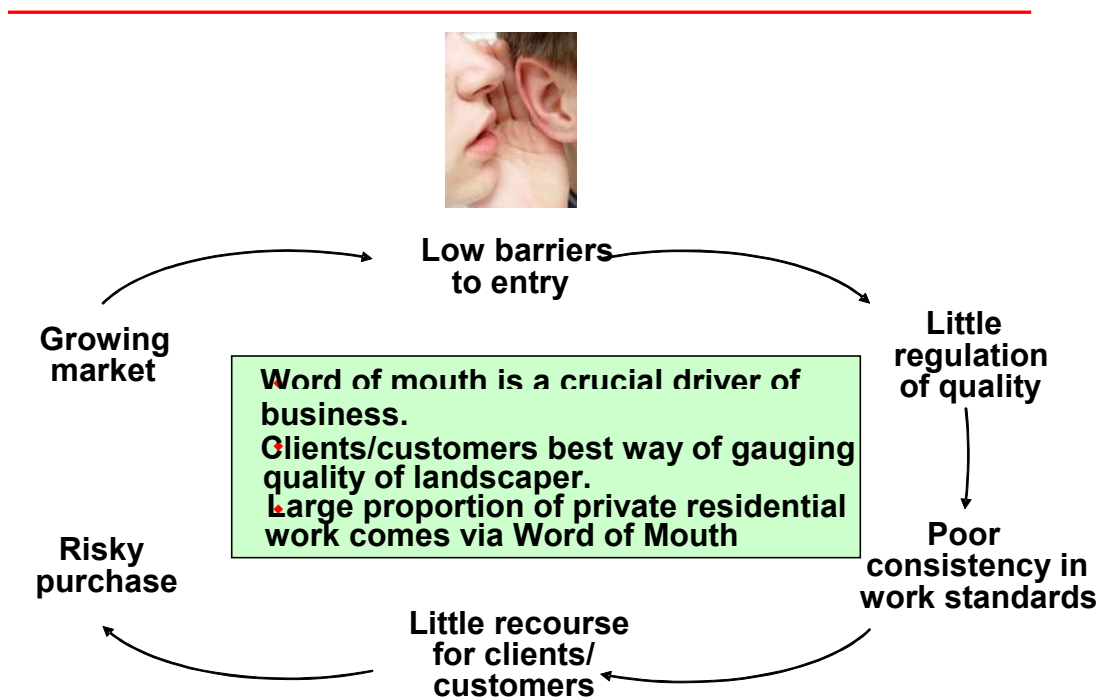
- ♦ **A clear need exists for proper regulation of the industry to benefit both the trade and consumer/client.**
  - Trade – increase standards, reward quality work.
  - Consumer/client – provide education on benefits/value of quality and how to identify.
- ♦ **Quality standards must be:**
  - Clearly transparent.
  - Easily assessed/graded.
  - Enforced.

All landscape professionals were forthcoming in their acknowledgement of the variability in the quality of landscaping standards provided by different landscape professionals. The overriding view was that clients/consumers had a poor understanding in relation to what constituted 'good quality landscaping'. There was also broad empathy for the fact that from a client/customer perspective, there were very few benchmarks to judge the 'quality of landscaping'.

**There was a clear appetite within the trade to have proper regulations and guidelines, through a set of standards in relation to what constituted 'quality' landscape work to guide clients/customers**

The belief was that this would benefit landscape professionals by raising the standard of work across the industry which would increase professionalism. It was believed that a set of standards would particularly benefit clients/customers through improving the number of quality jobs done to benchmark against, as well as giving them a greater appreciation for work that was well done. For regulation to be effective it was felt that the quality of standards needed to be transparent, easily assessed by everyone and actively (and independently) enforced.

## Importance of Word of Mouth Referrals



Landscape professionals believed that word of mouth referrals of past customers, in relation to previous work done were fundamental to driving new business

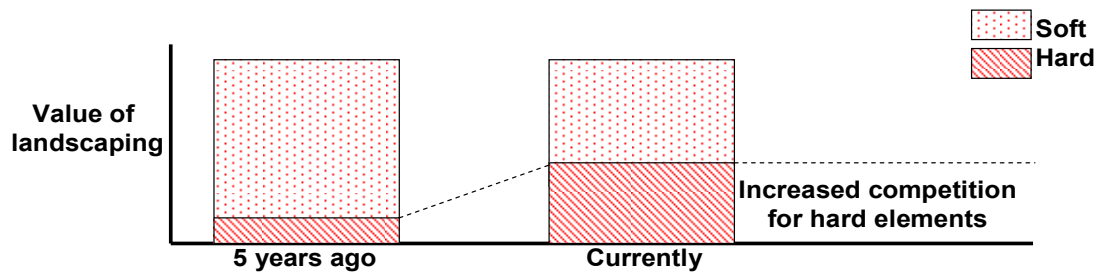
Landscape professionals' perception of the marketplace they operated in was that with growing business, low barriers to entry and poor regulation of 'quality' standards, customers/clients felt that it was difficult to choose a suitable professional. The belief was that oftentimes customers/clients had only the recommendations from friends and family, who had experience with particular landscape professionals in the past. An extension of this view was that word of mouth referrals by customers/clients reduced the risk of selecting a poor operator, the quality of whose work might only become evident upon completion of a job.

### Implication

The fact that 'word of mouth' referrals are the most important gauge and can be the only measure of professionalism in this industry suggests an industry that has not reached its full potential. Poorly defined and often variable quality standards serve only to confuse clients/consumers. These clients/consumers want to fully understand all aspects of 'quality' in landscaping particularly on high value jobs. Ironically, it would appear to be the lack of standards in the industry that facilitates low barriers to entry and the entry of many poorly skilled operators competing primarily on price – which devalues the entire industry.

## Shifting Importance of Hard & Soft Landscaping

- Recent growth has seen the volume of hard landscaping increase as a proportion of total business.



- Hard landscaping is a far more competitive area to operate in.
  - Landscapers.
  - Builders.
  - DIY etc.

Landscape professionals felt that within the previous five years the importance of hard landscaping elements had become more important.

Over this time period, it was felt that clients/customers were more likely to be seeking a higher proportion of hard elements incorporated into their designs. However, landscape professionals always saw a need for both elements and suggested that what was important for any given job was the balance between both. Plants were seen to be a core part of garden design. Their inclusion in designs and emphasis would depend on the actual client's preferences or the utility of the end garden.

Traditionally landscape professionals viewed that soft landscaping was more profitable than hard landscaping, as it involved lesser capital outlay (buying just plants). Hard landscaping projects involved a higher capital outlay (buying expensive component materials) which often resulted in lesser margins on a project.

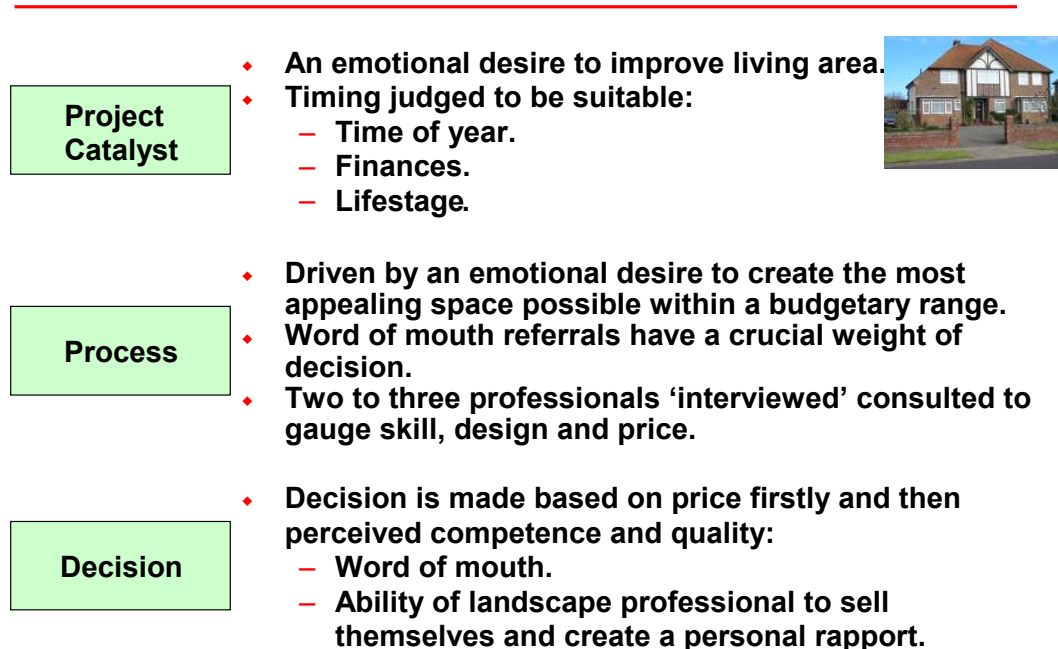
Landscape professionals also viewed hard landscaping as a more competitive space to operate in due to the increased potential sources of competitive alternatives or substitutes available to clients/customers e.g. building contractors and do it yourself (DIY) stores providing products and instruction.

### Implication

Most landscape jobs involve a balance between hard and soft landscaping elements. Landscape professionals with expert plant knowledge should seek to exploit their experience in this aspect of gardening, to give them a key selling point over less experienced operators and those whose expertise is purely in hard landscaping. However, this is only possible if consumers/clients are educated sufficiently to put a value on soft landscaping.

## Which Landscaper do I Use ?

### The Decision Making Process for Private Residential Clients



When dealing with private residential clients, landscape professionals felt that there was a strong weight of importance on their ability to act as a sales person, to prove their ability to support word of mouth referrals. Landscape professionals experience of how private residential clients decided on which service provider to use was based on their perceived ability to do the job at a reasonable price. Private residential clients typically spoke with two or three different landscape professionals and made their decision based on how well each performed on these three criteria (price, salesmanship or ability to convince client of the quality of their work in support of their referral).

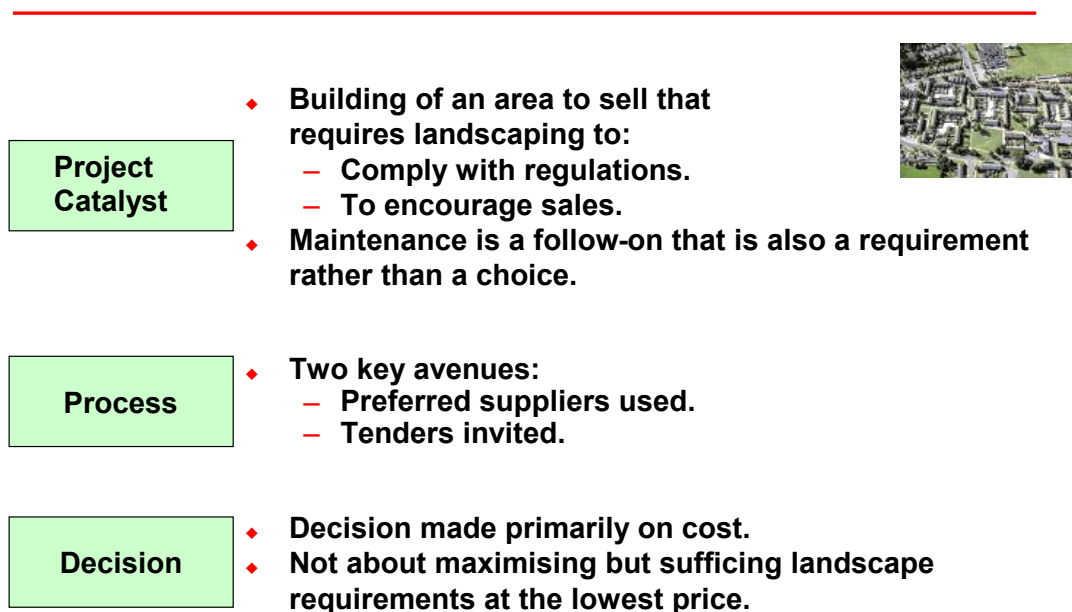
Price, salesmanship and the ability to convince a client of the quality of their work (in support word of mouth referrals) were seen as the three key factors private residential clients used to convince them to use the services of a landscape professional

### Implication

A landscape professional must be persuasive and convincing in their ability to undertake a quality job as well as being sensitive to price competition. Landscape professionals must first and foremost be able to 'sell themselves' and their own ability to deliver a quality job.



## The Decision Making Process for Private Commercial Clients



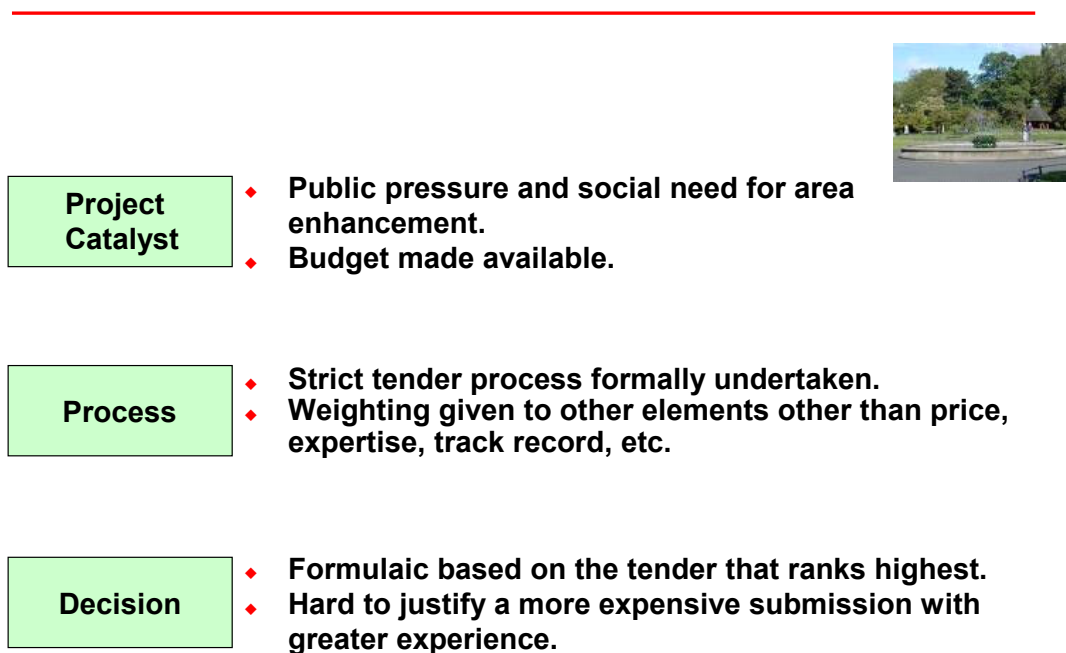
When dealing with private commercial clients landscape professionals felt that once the minimum requirements in terms of standards and specifications sought were provided that the ultimate decision on which landscape professional to hire was based on price

Private commercial clients were viewed as being largely ‘unemotional’ and focused on the financial impact of landscaping. They were typically looking to meet a standard specification set out by a designer or architect and were not interested in trying to find a solution that would provide a better standard of landscaping if it meant additional cost, that couldn’t be justified in terms of increased return on investment. Many private commercial clients had a list of preferred suppliers that they had built up an understanding and good relationship with over time. If landscape professionals were part of the group of preferred suppliers it meant that they had a greater chance of securing the business. Other commercial clients often used the tender process. Ultimately, landscape professionals felt that in order to win business within this space, that an ability to meet the client’s specific brief at a competitive cost was critical.

### Implication

Becoming a preferred and trusted supplier to a private commercial client would appear to be the gateway to repeat use of landscape professional’s services. This can only be achieved by gaining trust by investing time, gaining experience and delivering quality work within budget.

## The Decision Making Process for Public Clients



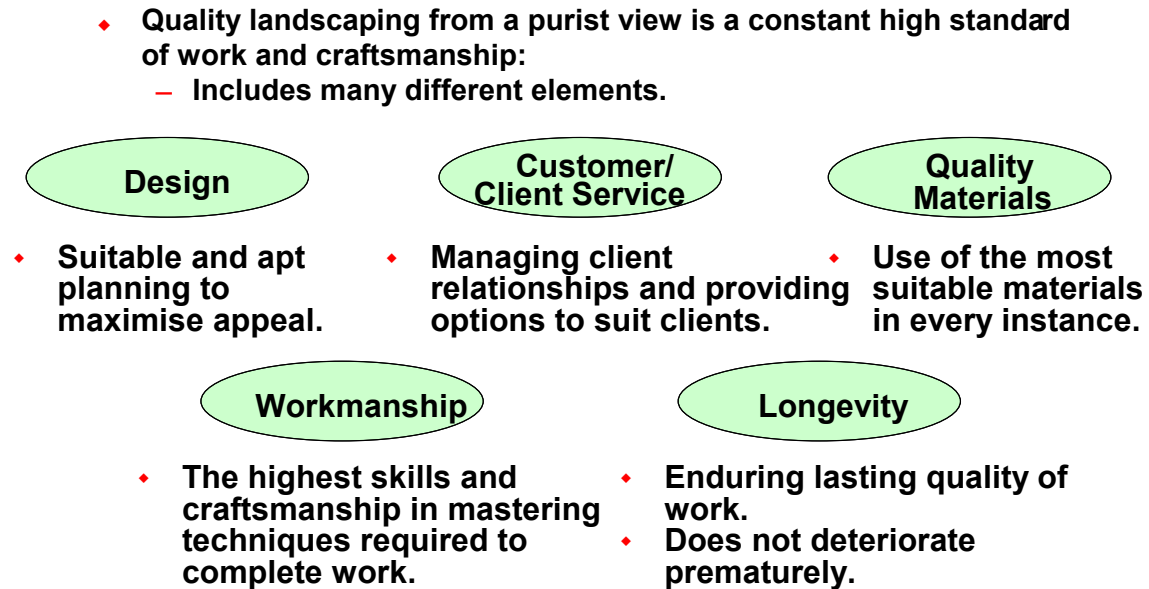
When dealing with public client's landscape professionals felt that this client group were under strict budgetary constraints and were also under immense pressure to get the best landscaping solution to meet the social need of an area

The ultimate decision was believed to be always made on price, as the decision maker would have difficulty justifying a decision to engage a higher cost landscape provider. The fact that most public project work is tendered out was seen to reinforce this belief. Furthermore, often a lack of understanding of how to assess the quality of different landscape work, led to price becoming the central focal point in influencing the final decision to award a project.

### Implication

This finding may point for the need to educate decision makers in local authorities as to the real social benefits of investing in quality landscape and design for the social good. This may be a departure from the more traditional thinking that landscaping is something that 'must be done' while always wanting the best job for the price given. Part of the education of public authorities must be to show managers how to recognise good quality work from sub-standard work. If these issues can be fully appreciated, then local authorities may see the social benefit of increasing their budgetary spend in 'greening up' the cities, towns and villages of Ireland.

## How do Landscape Professionals View a 'Quality Job' ?



For landscape professionals there were five key components that made up quality landscaping namely – workmanship, design, materials, client service and longevity

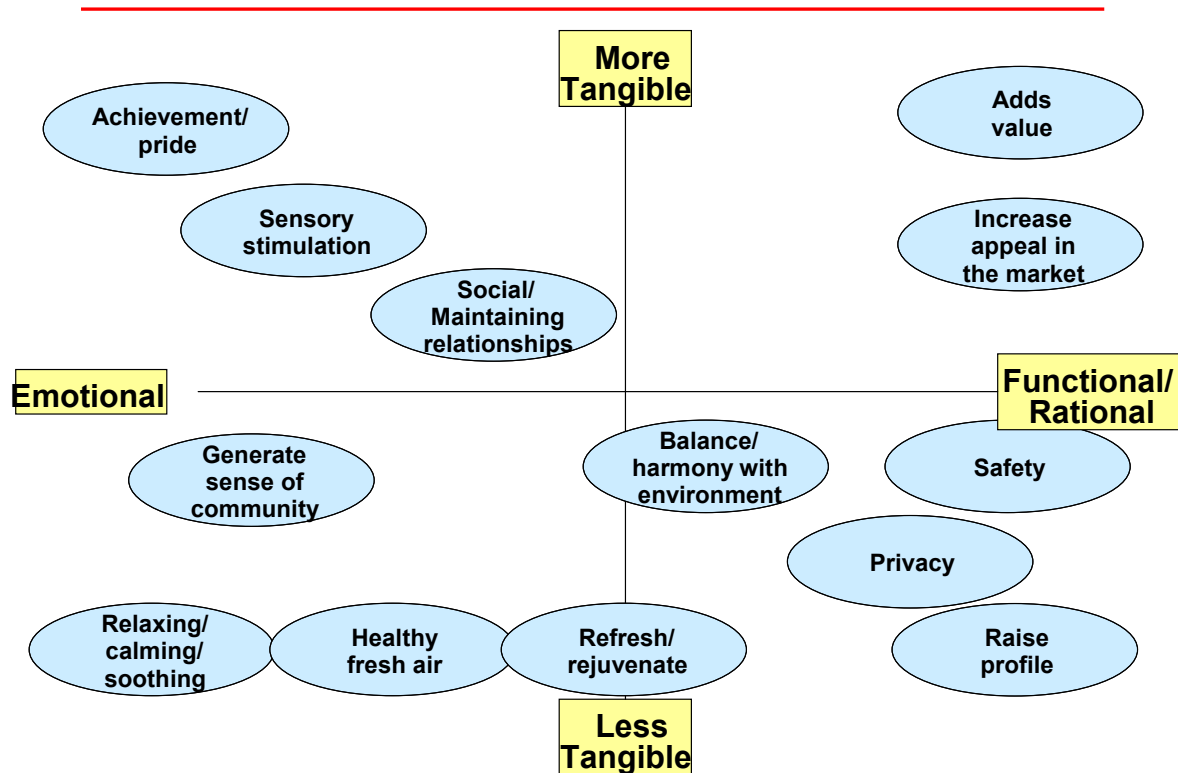
For landscape professionals quality landscaping was fundamentally about a high standard of workmanship and was not limited by budgets. In practical terms however, there was a balance that needed to be found between available budget and the quality provided. The workmanship and actual skill of execution of landscaping work needed to be of the highest standard.

It was also important to ensure that intelligent and creative design was used to maximise the potential of an area. The quality of materials used also needed to be the best available. Client/customer service was also listed as a key determinant of quality landscaping which was articulated as the skill of providing the client/customer with what they wanted, keeping them happy throughout the project (keeping them informed, good communication, meeting deadlines, etc.). Finally, longevity or the ability of the work done to last over time was considered an important component of quality landscaping.

### Implication

Landscape professionals have a clear view of the components of a 'quality landscape job'. Training in these areas must be available for landscape professionals but also education is needed for their clients/customers to recognise these aspects within any given landscape job. A clear set of guidelines / standards for the industry would greatly assist in this regard.

## How Landscape Professionals Saw the Benefits of Quality Landscaping Jobs for their Clients



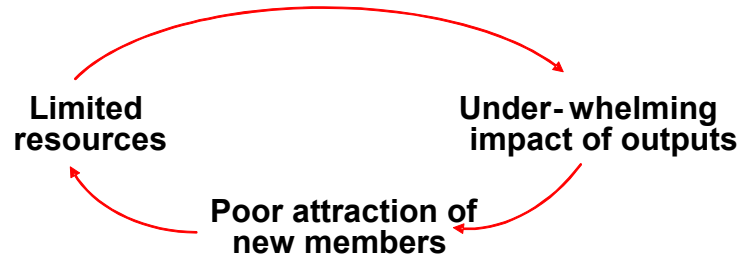
Landscape professionals considered ‘good quality landscaping’ capable of delivering a great deal of individual benefits for their clients. The benefits ranged from more tangible ones to intangible ones and also from more emotional to functional/rational ones (see illustration above).

The benefits largely depended on the particular client type (either private residential, private commercial or public) and their specified needs. Individual client types sought specific benefits through landscaping which often varied widely.

### Implication

Landscape professionals need to be aware of the wide range of tangible/intangible, rational and emotional benefits that ‘good quality’ landscaping can bring to clients. They must use these benefits as part of their ‘salesman’ role in selling the benefits of a landscape job to a client - while fully appreciating what is really important to the potential client.

## Limitations of Existing Landscape Industry Trade Associations



- ♦ Resources are key to growing trade associations.
- ♦ Entirely self sufficient structure with limited revenue streams inhibits the potential of their vision:
  - Infrequent conferences and newsletters.
  - Restricted scope to develop new initiatives.
  - Weak cut-through with clients/customers.

No single voice exists to speak out on issues for the entire landscaping industry – existing representative associations are too narrow in focus, struggle with resources and have little/no consumer recognition

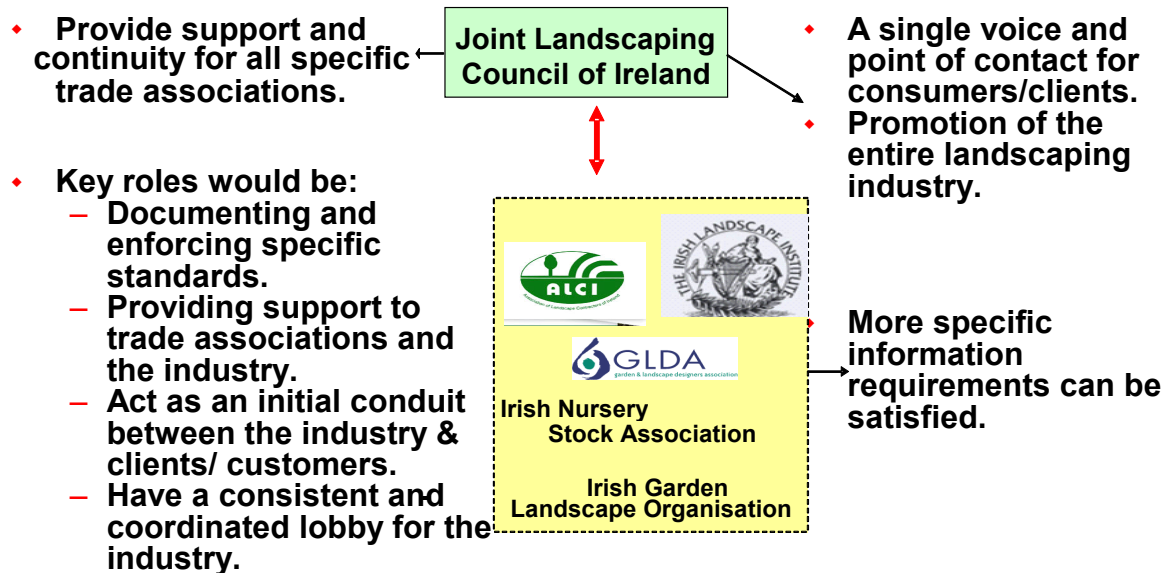
Many landscape professionals were members of a number of different trade associations. A common thread across all the landscape industry trade associations was that they mainly found themselves in a restrictive cycle due to a lack of sufficient resources. Trade associations were in place right across all the individual professions of the landscape industry (e.g. landscape designers – GLDA, landscape contractors - ALCI, landscape architects - ILI) and in the arena of growing through the Irish Nursery Stock Association. Each association also had a narrow focus on a particular segment of the landscape industry. All of the trade associations worked towards improving the standards and profile of their own members in their particular industry. All were run on a volunteer basis and were restricted in terms of what they could actually achieve due to limited time and financial resources. They all relied heavily on subscription fees as primary sources of income. Limited time and financial resources were the result and as such associations had restrictive scope to develop initiatives and increase the value to their members - in turn it was difficult to attract new members.

The result was that clients/customers had a minimal awareness of any associations due to low reach of output and there oftentimes instances of a series of mixed communications - as there was no one association to act on behalf of the landscape industry as a whole.

## **Implication**

The feeling among landscape professionals was that typically clients/customers wanted an industry wide association as an initial point of reference prior to any sub-industry trade association's contact. The lack of a single representative association means it is difficult to coordinate many necessary /desirable industry messages, initiatives and programmes to address real issues in the industry.

## Landscape Professionals Call for the Development of a Single Landscape Trade Association

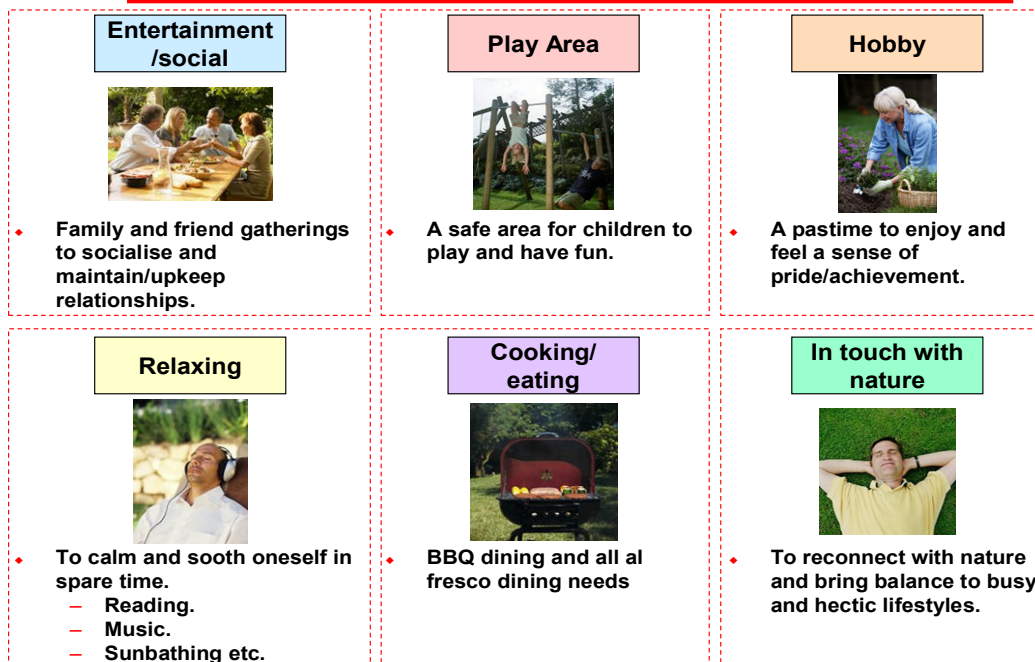


Landscape professionals felt that an over reaching association with overall responsibility for the landscape industry was required to inform and educate clients/customers and act as a single point of authority. The association should also guide and manage all other sub-industry trade associations in a more cohesive and joined up fashion.

# Quality Landscape & Design – Consumer Focus Groups

## How People Use their Garden

10.



Consumers (private residential clients) were found to use their gardens for six core functions:

1. for entertainment
2. as a play area
3. for gardening as a hobby
4. for relaxing
5. for cooking/eating/BBQ's
6. for getting in touch with nature

### Garden Use – Explained

1. **Entertainment/social use:** was established to be where family and friends used the garden as an area to gather and meet.
2. **Play area usage:** The garden provided a safe area for children to play outdoors and get kids outdoors in the fresh air.
3. **Hobby Use:** The garden was often used as a hobby in itself (with various levels of engagement). Maintaining the garden provided an active pastime.
4. **Relaxation Use:** The garden was a private area often used as an area to relax in.
5. **Cooking and Eating Use:** The garden was often used for BBQs and eating outdoors, just to be outdoors and enjoy the fresh air, sunshine and the garden itself.
6. **In Touch with Nature Use:** This use was to get in touch with nature and to feel balanced between busy lifestyles, hectic schedules and the need to be connected to nature through plants, birds, etc.



## How People Use and Benefit from their Gardens

### Usage X Benefits

Entertainment /social	➔	<ul style="list-style-type: none"> <li>Maintaining relationships.</li> <li>Achievement/house proud.</li> </ul>
Play Area	➔	<ul style="list-style-type: none"> <li>Healthy - fresh air.</li> <li>Safety/Privacy</li> </ul>
Hobby	➔	<ul style="list-style-type: none"> <li>Relaxation/calming/soothing.</li> <li>Achievement/house proud.</li> <li>Sensory stimulation.</li> <li>Adds Value to the home.</li> </ul>
Relaxing	➔	<ul style="list-style-type: none"> <li>Relaxation/calming/soothing.</li> <li>Refresh/rejuvenate.</li> </ul>
Cooking/ eating	➔	<ul style="list-style-type: none"> <li>Refresh/rejuvenate.</li> <li>Maintaining relationships.</li> </ul>
In touch with nature	➔	<ul style="list-style-type: none"> <li>Sensory stimulation.</li> <li>Good for environment.</li> <li>Refresh/rejuvenate.</li> </ul>

Each of the six key consumer uses of gardens were found to bring specific benefits. There were eight key benefits found that were the result of using a garden in a particular way. More than one benefit could be the result of a particular garden use, and a benefit could be derived from more than one use.

The eight key benefits seen to arise from using a garden were:

1. in its creation there was a sense of achievement/pride in house/home
2. through sensory stimulation (visual, smell, aural, etc)
3. maintaining relationships (bonding with others)
4. in adding value to a property
5. as a means of relaxing/calming/soothing
6. to stay healthy/fresh air
7. to become refreshed/rejuvenated
8. to provide a safe/private space

### Implication

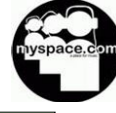
Knowing how people use their garden and the key benefits it gives to people can provide landscape professionals with a guide as to what needs they are satisfying through their work. The six uses and eight benefits of gardens can provide a framework for landscape professionals in assessing a client/customers real need, which will often depend on their life stage, the ownership status of the property and the allocated budget.

## People's Views on How Landscaping Added Value to Property



### Rational

- ♦ Size and aspect of garden are the fundamental determinants of the monetary value added to the property.
- ♦ Actual value in euro added to the property based on amount of landscaping work carried out.
  - Only quality landscaping will add value.
- ♦ First impressions of property are augmented by good landscaping.
  - Justified a larger value being placed on property.



### Emotional

- ♦ Landscaping is a fundamental expression of personal taste and preference.
  - An intimate connection between home owner and their vision of nature.
- ♦ Reluctant to accept another person's outlook on nature within their space (i.e. the seller).
  - Size, aspect important.
  - A blank canvas or return to natural garden is desired.

When purchasing property (usually to be their family home) consumers had both rational and emotional considerations in relation to existing gardens. On the rational side, the physical size (area) and aspect of the garden (in relation to the direction of the sun) were considered the most important elements of a garden. Any existing landscaping did add some value, if done well – but this would always be a matter of personal taste and family situation.

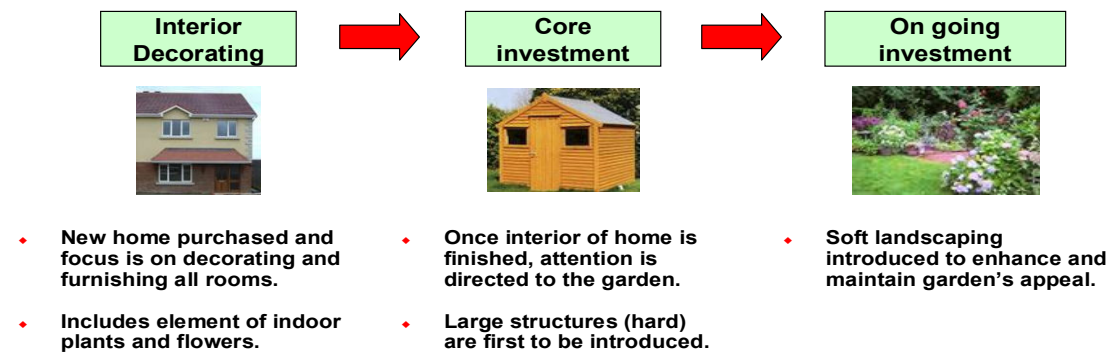
The size and aspect of an existing garden were of central importance when looking to buy a new home with a garden. Emotionally consumers wanted to be able to create their own vision of what they saw to be their ideal garden based on their own tastes/needs and preferences

Looking forward, the size and aspect of a garden were considered the key elements and the foundation to developing their own ideal garden. Existing landscaping increased the value of the garden but it was unlikely to be the consumers ideal garden due to personal taste differences and its failure to meet their specific life stage needs (especially if they had young children).

### Implication

Gardens are a matter of personal taste and each person (or couple/family unit) will have their own specific needs in relation to their time of life and level of interest. Landscaping a garden in advance of selling a new home may seem like a good idea and make the property look more attractive. However, it is not until a property is actually bought that the new owners will be engaged with decisions on landscaping to produce a garden that suits their particular needs.

## Landscaping Timeline



There was a clear linear progression in priorities from purchasing a home to landscaping the garden over time. This priority was initially interior house decorating, then it moved on to putting in place the structural aspects of the garden and finally ongoing investment/addition of plants

Peoples initial concerns were seen to be primarily focussed on the home, in furnishing and decorating it as desired. The initial objective for new home dwellers was to ensure that a minimum standard of decoration and furnishing was achieved inside the home to allow the consumer live comfortably. Indoor plants and flowers were included as part of the original spend focus. As the core space where consumers lived the home was the primary focal point.

Once the home was 'dealt with' focus then shifted to the garden. Any large undertakings that were required were addressed first e.g. large construction items –sheds, walls, etc. This stage was typically concerned with establishing the key hard landscaping elements of the garden. Once these elements were completed, the garden was in a form that had the backbone of the consumer's vision of an ideal garden. Over time soft landscaping elements (i.e. planted material) were then continuously added to the initial hard elements.

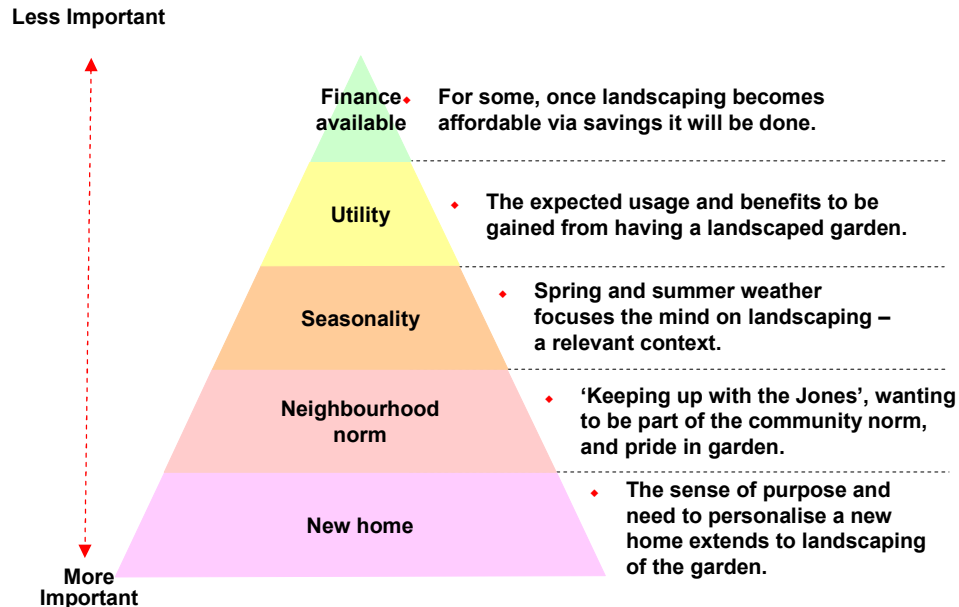
The initial work and investment in landscaping the garden was referred to as 'core investment' and the follow-on soft landscaping was referred to as 'on-going investment'.

### Implication

Following the purchase of a house people may be focusing / investing in either their home or garden. In addition, most housing schemes have a lifecycle of appeal to certain demographic types of consumers. Landscapers should be able to appraise the needs of each individual family unit within the context of how long they own their dwelling and the expectations of the surrounding area/housing development.

## Investment Decisions and Landscaping

### Consumer Triggers to Investing in Landscaping – In General



There were five key triggers found to consumers actually deciding to embark on core investment in landscaping. Elements at the broad end of the triangle were more important in acting as triggers to core investment - those towards the narrow end of the triangle also acted as triggers but were not as influential as those at the broad end.

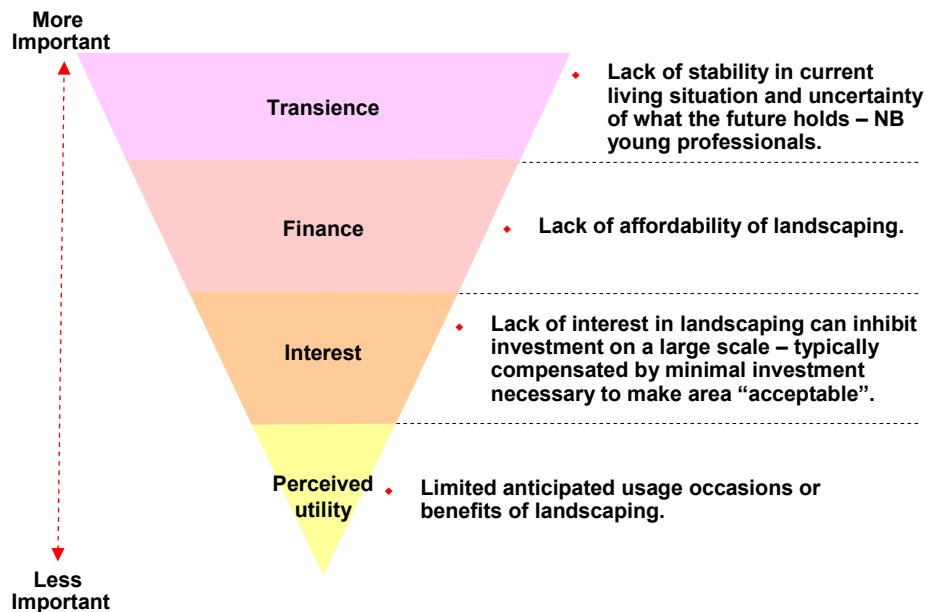
The single most important trigger to core investment in landscaping was the purchase of a new home and the accompanying desire to decorate and tailor both home and garden to consumer's personal tastes

Keeping up with the neighbourhood or street/estate norms was also a key trigger, with home owners seeking to have gardens that were at the same level as neighbours. Seasonality was also an important trigger with fine weather in spring and summer months focussing consumers' attention and need to attend to the garden (and maybe landscape as part of this process). Lesser triggers included people's expectations around actually using the garden – if they felt they would use it, they were more inclined to invest in it. For some finance was a key trigger - once finance was available, landscaping was considered/organised.

### Implication

The amount of new housing developments / construction in the general economy is a barometer of the health of the landscape industry. The education of people as to the value of landscaping can become a key consumer trigger to invest.

## Consumer Barriers to Investing in Landscaping – In General



There were four key barriers that were evident and actively inhibited investment in core landscaping.

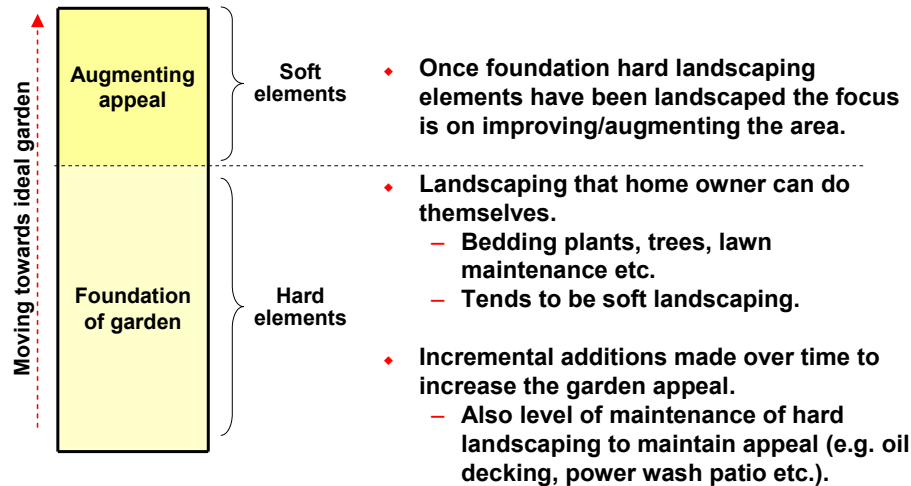
**Transience; a lack of stability in ones living situation and an expectant movement to a new home in the near future was the key barrier to core investment in landscaping**

A lack of finance being available was also another barrier to investment, followed by a lack of interest in landscaping. Finally, a belief that consumers wouldn't get a justified benefit from landscaping acted as a barrier, in that they did not expect to have sufficient opportunity to enjoy the landscaped area.

### Implication

Landscaping professionals need to understand that where transient populations are located the investment opportunities in landscaping are reduced.

## Consumer Decisions in Relation to On-going Investment in Landscaping

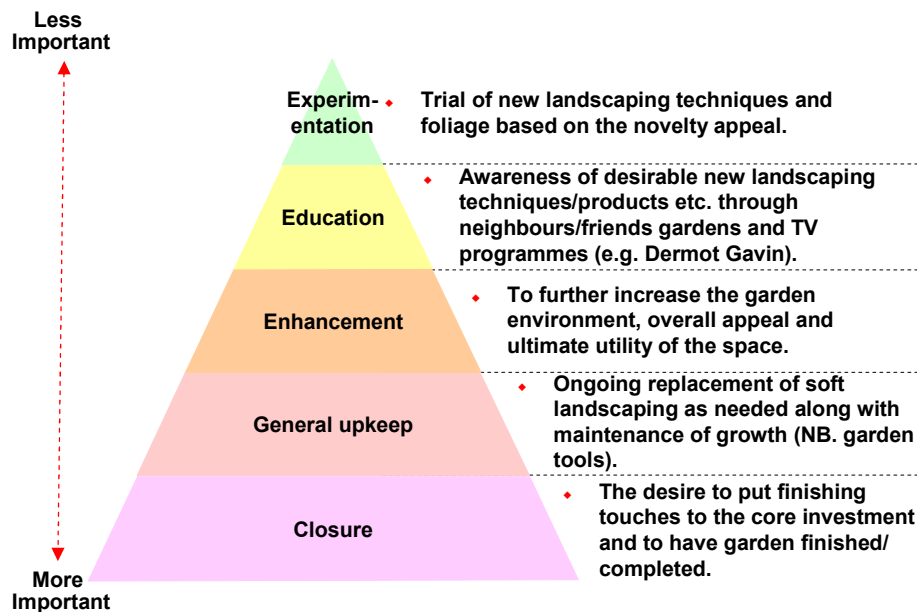


Consumers considered that an initial investment in hard landscaping elements was necessary to establish the core foundation of their gardens. However, once this initial investment was complete the focus was on improving the garden over time through maintenance of the hard elements (e.g. protecting decking, fences, etc.) and by adding soft landscaping elements.

### Implication

Landscape professionals must be alert to the stage of investment that their clients may be at and the different requirements / level of investment that each will bring.

## Consumer Triggers to Ongoing Investment in Landscaping



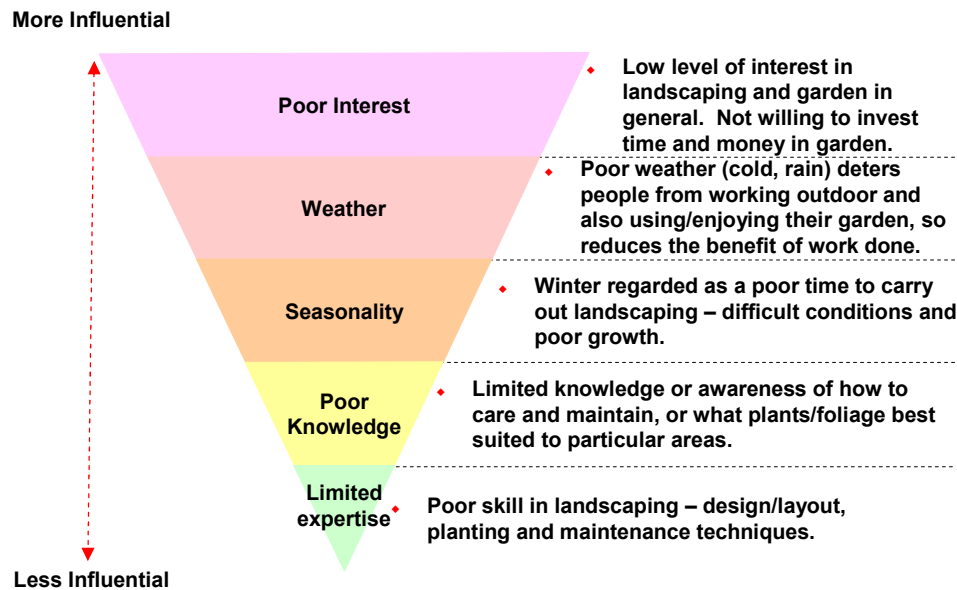
The triggers to ongoing investment in landscaping were most notably closure or the desire to actually finish off the garden

The second most important trigger was general upkeep and the need for ongoing investment to ensure that consumers' gardens were maintained at a certain level. Enhancement was a trigger that related to consumers' desire to not only maintain but to improve their garden. Education was an important trigger and when consumers were educated on new techniques or products it had a significant potential to act as a trigger to ongoing investment. The final trigger was a desire for experimentation, which was centred on wanting to enhance existing garden and emerging awareness of new techniques and products.

### Implication

Education on all aspects of gardening, giving consumer's ideas on the potential uses and benefits of their gardens, could play a key role in persuading them to invest more in it, on an ongoing basis. Having the knowledge of potentially what 'could be' and how best to achieve it, is an essential first step. All industry stakeholders are ultimately charged with the promotion of the benefits of their professional services.

## Consumer Barriers to Ongoing Investment in Landscaping

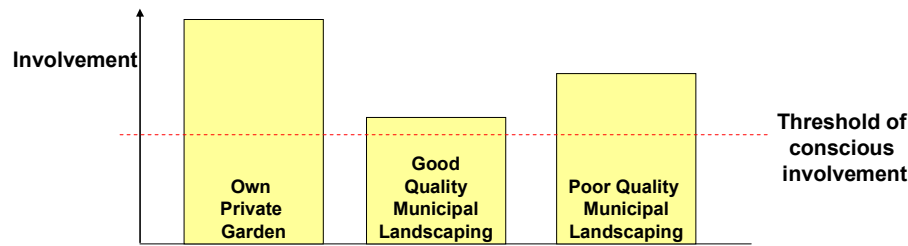


The key barrier to ongoing investment in landscaping was primarily a lack of interest in landscaping and the garden itself

The weather, namely poor weather was the next most influencing barrier. Consumers were less likely to be willing to use and be willing to invest in their garden in poor weather. Similarly, seasonality deterred investment, whereas summer months focussed the mind on investments in landscaping, winter months tended to act as a barrier as this was not the time that the garden was used or considered primarily. Another barrier was a lack of or poor knowledge of how to maintain or care for a garden. The final barrier was limited actual expertise or experience with landscaping. Poor skills or confidence in ones gardening ability reduced likelihood of investment.



## Role of Municipal Landscaping



- ♦ **Municipal landscaping is expected to be done correctly.**
  - Almost considered to be a hygiene factor.
- ♦ **If present and of sufficient quality will not stimulate a strong level of conscious involvement.**
  - More subtle part of the cumulative emotional affinity and connection to the area.
- ♦ **When not present or done poorly municipal landscaping is more likely to be noticed.**
  - Expectations not being met.

**Most consumers expect a good standard of municipal landscaping, where common areas must meet a minimum standard**

Where municipal landscaping achieved an expected minimum level, it tended not to be noticed or engaged with to the same levels as private landscaping. Municipal landscaping was seen as adding to the general feel and atmosphere of the area but did not stand out significantly on its own. In order for municipal landscaping to stand out specifically it need to be of a very high quality and even at this level engagement levels were not as high as with personal gardens.

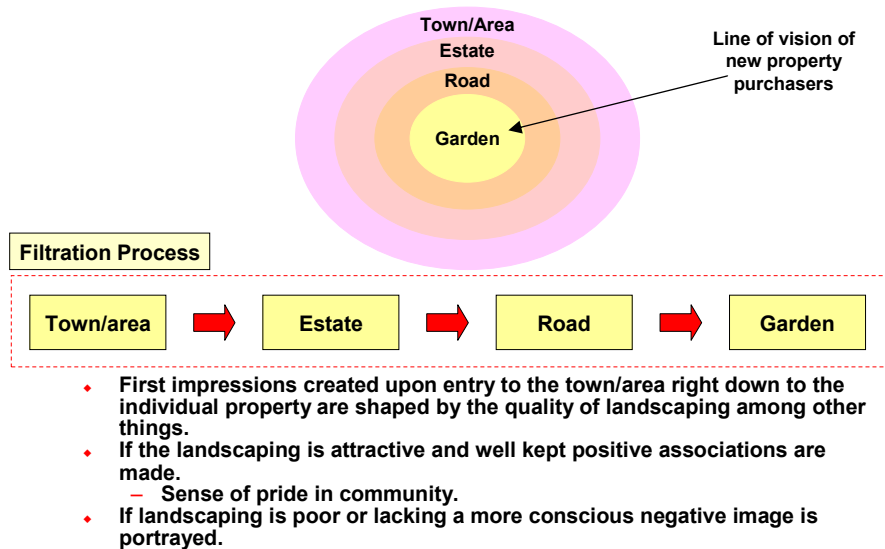
Poor municipal landscaping had the potential to stand out more so, albeit negatively, than quality municipal landscaping. Poor municipal landscaping was more noticeable than quality landscaping, as it was seen as an eyesore and something that needed to be addressed.

**In certain cases, poor quality landscaping in common public areas of a community was associated with a lack of civic pride in an area, social disconnect, poor community spirit and a catalyst to attract social problems (e.g. vandalism, crime, etc)**

### Implication

Local authorities should be encouraged to invest in landscaping as a means of addressing public goodwill and social harmony. In particular, local authorities need to take a close look at public areas within each community they serve and work out an appropriate landscaping programme.

## Property Purchase and the Role of Landscaping



Private and municipal landscaping played a role in influencing consumers in their purchase of a property.

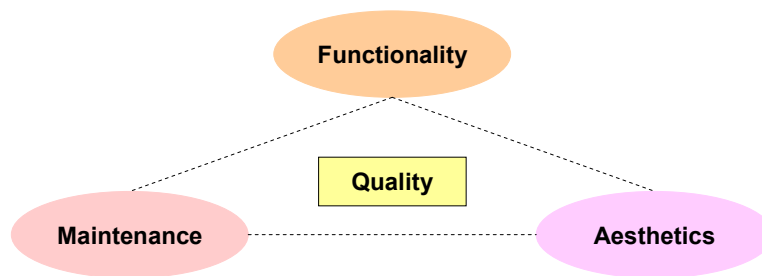
In terms of the importance that landscaping made in the purchase of a property, the actual private landscaping that had been done in the garden had the weightiest impact - as it had the greatest potential to add value to a property and potentially attract higher sale prices. Municipal landscaping created part of the initial impression of an area/district.

The role of municipal landscaping was not as obvious and did not have as direct an impact on the purchase of property, but municipal landscaping was part of the initial impression and image of the area and estate before reaching the property. Property in certain areas was known to be of a certain value and the level of municipal landscaping in the area contributed to that overall value e.g. buying property in a 'leafy' and 'mature' area with well kept parks held strong appeal. So the extent and quality of municipal landscaping had the potential to affect initial impressions and raise or lower expectations for the actual property.

### Implication

It should be communicated to consumers that investment in their garden can contribute greatly to the expectation of achieving a higher resale value for their house, compared to a house with a poorly landscaped garden. Consumers should appreciate that investment in producing a quality garden, is an important element of the overall 'saleability' of a house both in monetary terms and in terms of making a 'quicker' sale.

## Consumer Trade off in Relation to 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.

The term 'quality' for consumers, in relation to landscaping comprised of three key elements namely; functionality, maintenance and aesthetics.

Functionality was the ability to use the garden as a specific functional space for specific activities (e.g. relaxation, play, eating, entertaining, etc). Maintenance was the actual amount of work required to keep a garden or landscaped area looking well. The majority of consumers desired to keep maintenance required to a minimum. There were a minority that actively enjoyed certain elements of maintaining a garden as a hobby (e.g. weeding, clipping etc). Consumer's desire for aesthetics was the desire to create a garden that was both visually pleasing and appealing to the senses.

These three elements were the foundation of consumer's view of 'quality landscaping'. Unfortunately for them, consumers found that it was difficult to maximise what they sought from all of these three elements simultaneously. They found that as one element of importance increased then typically another was sacrificed. For example; the more functional a garden was the less aesthetically pleasing it was. The more aesthetically pleasing a garden, the more maintenance was required and so on.

### Implication

The challenge for consumers was striking a balance between functionality, maintenance and aesthetics. Every consumer had a different garden and life situation – the best that landscape professionals can do is to recognise their client's individual needs and point out the full range of options open to them (to get maximum use and benefit from the garden).

## Consumer Perception of Good versus Poor Quality Landscaping

- ◆ Despite the priorities of consumers at any given life stage there is a universal understanding of what constitutes good and poor quality landscaping.
- ◆ Personal preference and taste will vary but the fundamentals remain constant.

Good Quality	Poor Quality
<ul style="list-style-type: none"> <li>◆ Well maintained – neat and tidy.</li> <li>◆ Visually appealing.</li> <li>◆ Practical/intelligent placement of hard and soft elements.</li> <li>◆ Balance between hard and soft elements.</li> <li>◆ Privacy.</li> </ul>	<ul style="list-style-type: none"> <li>◆ Unkept, messy and poorly maintained – lack of attention.</li> <li>◆ Dead foliage, weeds or patches of muck and lawn.</li> <li>◆ Over use of hard landscaping elements.</li> <li>◆ Poor use of colour, layout etc.</li> </ul>

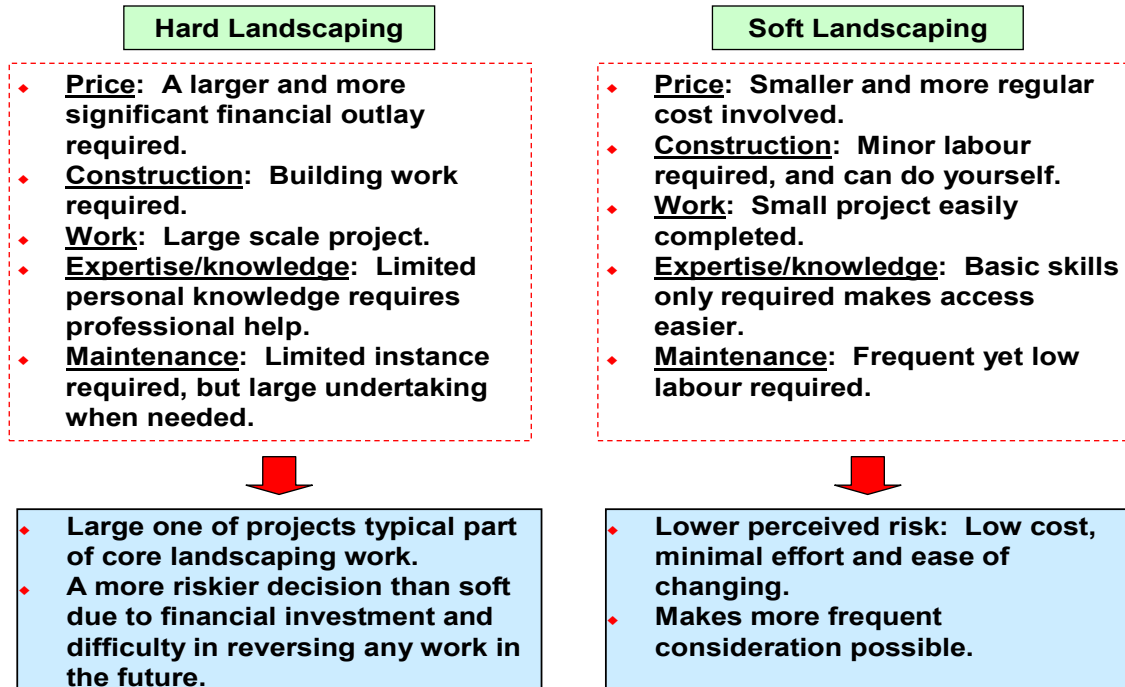
Stage of life is the critical factor in determining the type of garden a person needs. The specific landscape elements that individuals desired varied depending on what stage they were in their lives

Therefore, stage of life influenced perceptions of good or bad quality, as consumers related to their own needs at any given time. For example, young singles placed a premium on low maintenance, younger families on a functional area for children, empty nesters on a higher level of aesthetics, etc. Despite seeking slightly different things from landscaping consumers agreed that there were fundamentals that determined whether landscaping was of a good or poor quality.

All consumers felt that a key element of good quality landscaping was that there would be a balance in the design that placed hard and soft elements in complementary locations

A suitable balance in the amount of hard and soft elements was required, as was a level of aesthetic appeal. Quality landscaping jobs were seen to always facilitate privacy and it was paramount that the landscaped area always had an appearance of being well maintained. Poor quality landscaping was characterised by the opposite of these elements – these gardens appeared poorly maintained and it often appeared that there was poor overall garden design. Poor quality landscaping typically brought about a low satisfaction rating on aesthetics, which oftentimes was the result of a lack of balance between hard and soft elements. Consumers expressed the view that it did not necessarily hold true that the more money spent on a garden the better it was, but they appreciated that some investment was required.

## Consumer Decisions on Using Hard & Soft Landscaping Elements



Consumers made a clear distinction between decisions in relation to hard and soft landscaping elements. The majority agreed that both hard and soft elements were required to maximise the appeal of landscaped areas.

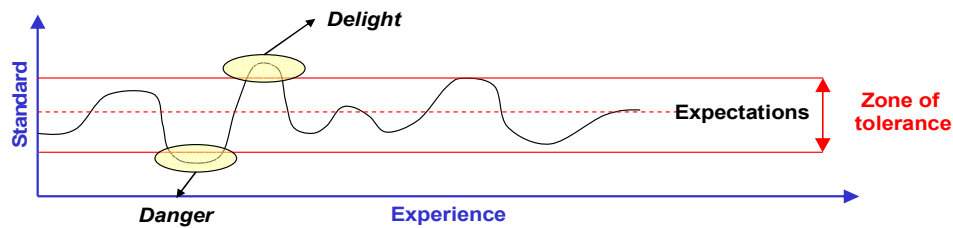
**Deciding to get hard landscaping done was perceived to be a riskier decision compared to soft landscaping**

Hard landscaping required an element of construction and expertise that the majority of consumers felt incapable of doing themselves. There was also seen to be a significant cost involved for materials and labour. For these reasons, combined with the difficulty associated with removing or changing any hard landscaping elements, hard landscaping work was considered to be a riskier decision than soft landscaping work. Soft landscaping was seen to be relatively inexpensive, involving a smaller amount of work that individuals could do themselves and was easily reversible if changes were desired.

### Implication

Hard landscaping involves a deeper level of thought and consideration than soft landscaping for consumers. Research and consultation with professionals is often sought in relation to hard landscaping decisions and is at the centre of the reasoning behind using landscaping services. Landscape professionals must appraise each of their customer needs and be capable of giving their clients a full array of soft and hard landscaping choices appropriate to their circumstances.

## The General Standard of Landscaping Services in Ireland



- ♦ Past experiences have set a precedent for wide variations in the standard of landscape professionals dealt with:
  - Construction/maintenance service.
  - Advise/knowledge in garden centres.
  - Family/friends etc.
- ♦ Large sense of “buyer beware” as there were believed to be many charlatans operating in the industry.
- ♦ A zone of tolerance is set up around expected standards – satisfied once within this zone.
  - Large reliance on word of mouth to identify the better professionals.
- ♦ Focus is on not making the bad choice – i.e. happy to satisfy in zone of tolerance rather than striving for best provider.

Consumers were of the opinion that the standard of landscaping services provided by landscape professionals in Ireland was subject to a significant level of variation

Personal experiences supported by experiences of friends and family were the key drivers of this perception. The resulting belief was that there were both good and poor quality landscape professionals and that the consumer had to exercise caution to ensure that they didn't solicit the services of the lesser operators.

From a consumer perspective the main focus of attention on choosing a landscape professional was in not selecting one of the poorer one's rather than choosing from operators of equal degree's of excellence across the industry

There was a minimum standard that consumers expected and hoped to receive. However, they rarely focussed on finding the best landscape professional and were more concerned with avoiding the worst ones. Once these lesser quality oriented landscape professionals were avoided, the consumer felt they had achieved success, as long as the quality of landscaping was deemed satisfactory. This satisfaction was more happiness in terms of not being ‘ripped off’ rather than any purest appreciation of the quality of the work being done.

### Implication

The public are highly aware of the variability of work and cost involved in landscape and design. The public are keen to obtain a simplified guide to discern between good and bad quality work and landscape operators.

## Consumer Attitudes to Using Large Versus Small Contractors

<p><b>Large scale landscaping companies</b></p>	<ul style="list-style-type: none"> <li>• <b>Smaller number of large players who provide the best standard of work – consistent quality and high levels of expertise and knowledge.</b></li> <li>• <b>Regarded as being market leaders (top of the range) and as such are expected to be more expensive.</b> <ul style="list-style-type: none"> <li>– Belief evident that they're not interested in smaller projects</li> </ul> </li> </ul>
<p><b>Smaller sole trader operators</b></p>	<ul style="list-style-type: none"> <li>• <b>Majority of the market comprised of these providers.</b></li> <li>• <b>Very susceptible to varying standards, but more accessible.</b> <ul style="list-style-type: none"> <li>– Cost</li> <li>– Availability to do work.</li> </ul> </li> <li>• <b>Less confidence in professionalism – smaller organisation, reputation based solely on word of mouth and "selling ability" of the landscaper.</b> <ul style="list-style-type: none"> <li>– Not salesmen but craftsmen – can arouse suspicion on professionalism.</li> </ul> </li> </ul>

Consumers felt there was a clear difference between larger landscaping organisations and smaller sole trader type operations in the context of the work they did and their perceived accessibility.

Consumers felt that larger landscape professionals were more professional yet more inaccessible, while smaller landscape professionals were more accessible but were regarded as being more variable in the actual levels of professionalism

The larger landscape organisations were considered to be successful due to their size and by inference provided good quality landscaping services. They were also perceived as being market leaders in the industry and as such consumers expected higher quality but also a premium price. Due to the perceived large scale of these organisations and premium cost, there was a feeling that these organisations operated on a level of business that was so large, that small scale private landscaping was of little interest to them. These organisations were considered to be a small proportion of the market and the remaining majority were perceived to be made up of smaller sole trader type operations. The smaller landscape professionals were perceived to be more reasonable in terms of price, but were also highly susceptible to variable standards in quality of work. Smaller landscapers were also considered more interested in carrying out smaller landscape projects, but the consumer felt that there was a lack of a consistent manner to assess their standards prior to contacting them.

### Implication

There is room in the market for landscape professionals, irrespective of size, to develop a reputation based on high quality of work at a reasonable price. These operators should be able to easily communicate to clients exactly what they are getting for their spend, by providing some easily understood benchmarking facility on their quality standards against other competitors/industry standards.

## Consumer Awareness of Trade and State Organisations



Consumers' awareness of trade associations connected with the landscaping industry was minimal.

**Consumers demonstrated a clear appetite for a single consumer focused landscaping organisation that regulated standards to ensure specific levels of quality**

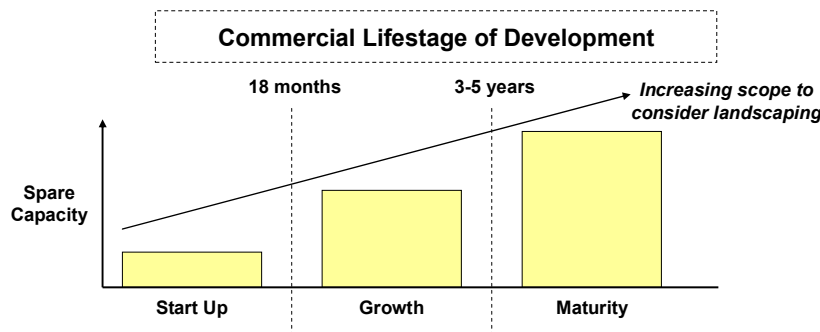
Consumers thought such an association would be useful to assist them in selecting landscape professionals and ensure that they were selecting from amongst quality oriented suppliers. There was also an appetite from consumers for a landscaping organisation to provide basic guidelines on prices and actual standards required for specific landscaping work (e.g. recommended materials). Bord Bia was viewed primarily by consumers as an organisation promoting food. There was minimal awareness of Bord Bia's role in the landscape industry apart from their direct association with the garden show 'Bloom'. Nonetheless given the scope of work that Bord Bia do currently deliver on, it was felt that Bord Bia were well placed to emerge as a competent organisation to direct work in this area.

### Implication

Consumers want simple solutions to real problems they have in understanding a subject matter they largely poorly understand (gardening). Trade and consumer research point to deficits of knowledge in the market to help consumers make real choices and their expressed desire to have an independent organisation provide help and advise them.



## Commercial Business View of the Value of Landscaping



The commercial life stage of a development was critical to the consideration of landscaping. Commercial organisations saw themselves concerned with three key elements (with associated costs) when running their businesses namely linear, consequential and hidden elements. Linear elements were the core activities of the business that generated sales and revenue (i.e. selling products/services, managing customers/clients etc). Consequential elements were support activities that supported linear activities (e.g. staff, premises etc). Finally, hidden elements were those that were perceived to improve working conditions but had no direct relationship with providing a return on investment (e.g. vending machines, landscaping etc.). These hidden elements were the lowest concerns for commercial organisations and were typically only addressed once linear and consequential elements were clearly and strongly established. Commercial organisations at start up had little scope to focus beyond establishing and managing linear and consequential elements of their business operations.

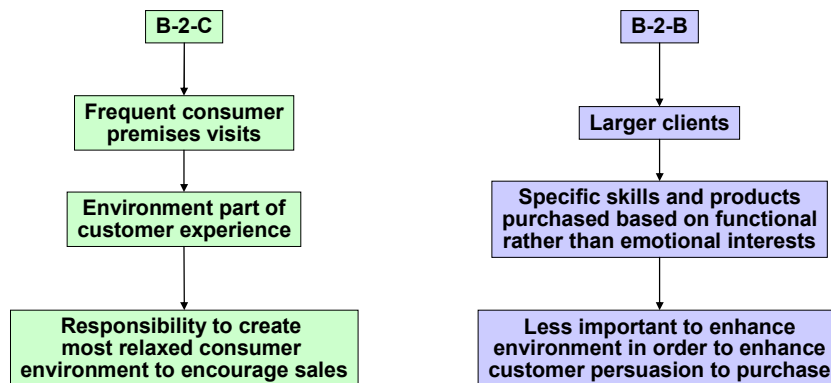
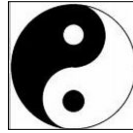
In general, it was only when a commercial organisation had reached a certain level of maturity and relative comfort in their business operation, that there was scope for landscaping to be considered

### Implication

Businesses are typically driven by 'bottom line' decision making particularly in start-up situations. Landscape professionals need to appraise the client customers in their area and come up with an offering appropriate to each company tailored to its stage of development and financial standing.

## Landscaping for Business Organisations – Level of Involvement

### Business to Business versus Business to Consumer



Commercial organisations were found in the most part to be concerned with generating revenue and profit. Companies reported that they often found themselves unable to consider landscaping for their business, as it would involve spending money with little/no impact on generating income.

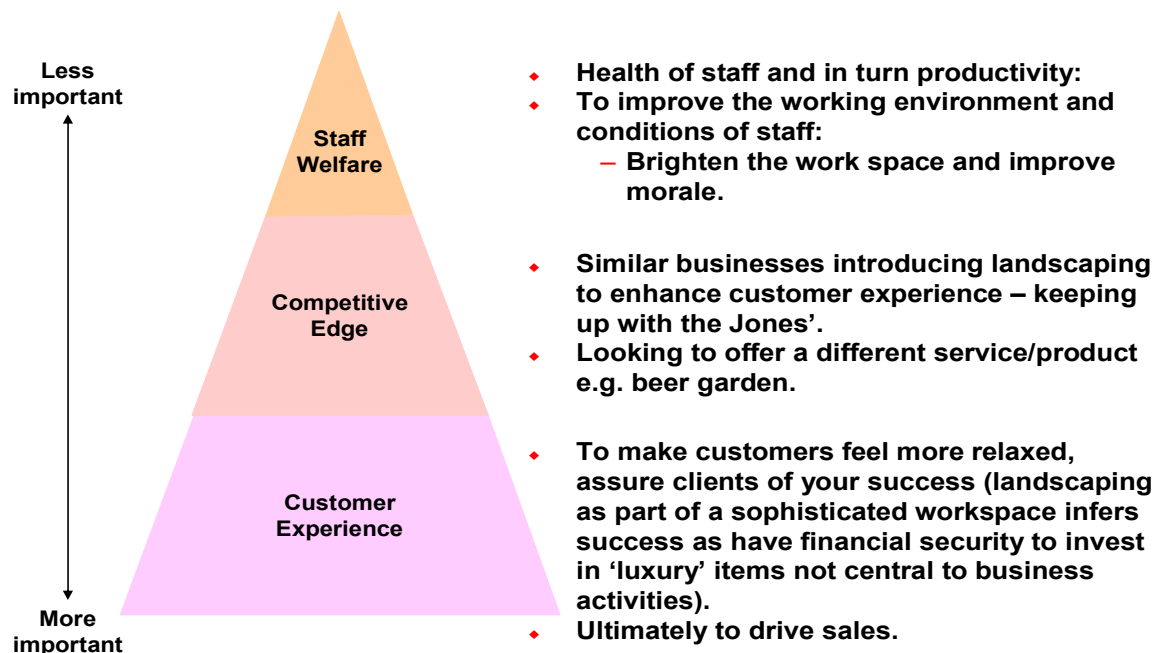
The key role for landscaping within commercial organisations was to either:  
 (1) provide a more pleasant environment for customers to encourage increased sales (only relevant for business to consumer organisations) or  
 (2) to provide a more relaxed working environment for staff and hence improve productivity (relevant to both business to consumer and business to business organisations)

Business to consumer organisations felt that they had a higher level of justification for considering landscaping over business to business organisations.

### Implication

Empirical research / studies need to be brought to the attention of the wider business community that good quality landscaping can encourage increased sales and/or improve productivity of employees.

## Triggers Motivating Business Clients to Use Landscape Services



There were three key triggers that influenced commercial organisations in a positive manner towards considering using landscaping services.

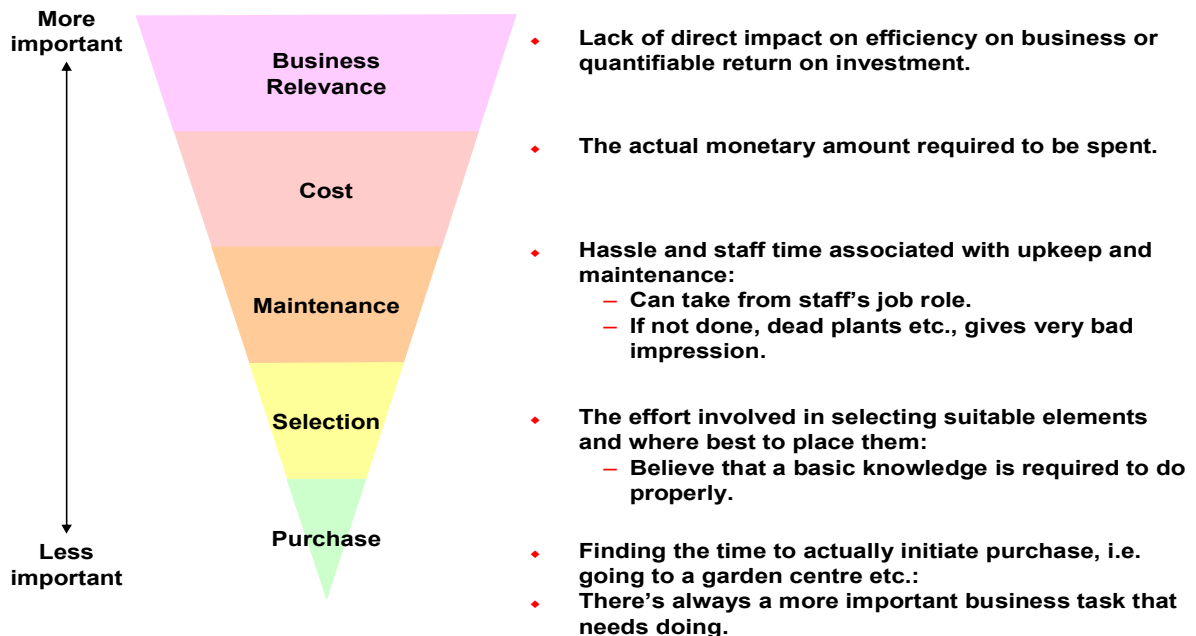
The most important factor that influenced commercial organisations in a positive manner towards using landscaping services was the potential impact that landscaping would have on enhancing the customer experience leading to increased sales and repeat custom

Should the customer experience be improved through landscaping the hope was that repeat custom and increased sales would result. The need for a competitive edge was the next most salient trigger and was concerned with either keeping up with competitors who had incorporated landscaping or to similarly gain a competitive edge over those who hadn’t. The final trigger for consideration of landscaping for commercial organisations was the potential positive impact that it would have on staff welfare, which would hopefully increase employee satisfaction, encourage staff retention and impact positively on productivity.

### Implication

Empirical research / studies need to be brought to the attention of the wider business community that good quality landscaping can encourage increased sales and/or improve productivity of employees.

## Barriers Preventing Business Clients Employing Landscape Services



There were five key barriers to commercial organisations actually considering landscaping.

**The most influential barrier to considering the use of landscaping services in commercial business was its lack of direct contribution to the profitability of the business**

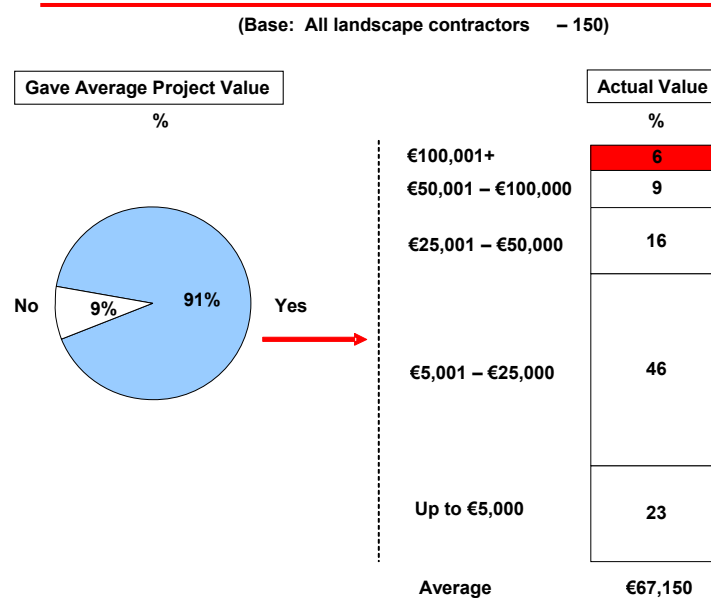
In general, it is a perceived lack of business relevance and the potential negative impact on revenue or profit that was seen as not justifying the cost of landscaping. Therefore it is the actual cost itself that can act as a significant barrier. Maintenance was seen as another key barrier. Commercial organisations were concerned over the cost of maintaining landscaped areas from both a cost (materials and products) and on-going staff time perspective. Other less important barriers were seen as having the time and expertise to select suitable landscape elements and finally, to find the time to organise, purchase and set up construction of any landscaping.

### Implication

Empirical research / studies need to be brought to the attention of the wider business community that good quality landscaping can encourage increased sales and/or improve productivity of employees.

## Quality Landscape & Design / Market Size Estimate – Trade Survey of Landscape Contractors

### Estimated Average Value for Landscaping Projects



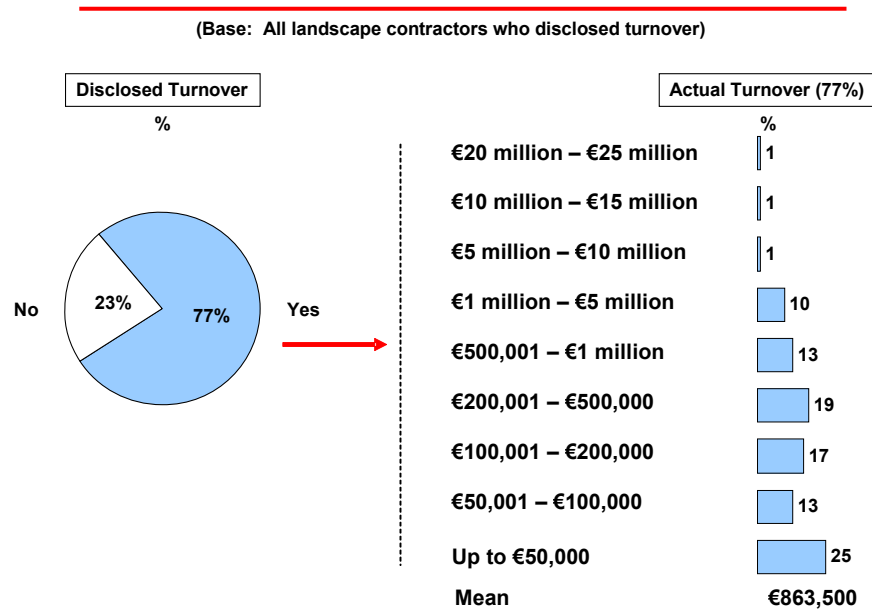
More than 9 in 10 (91%) of all landscape contractors in a survey of 150, disclosed their average value for a single project.

The average recorded value of a landscape project in Ireland, in 2007, was €67,150.

Almost half of all landscape contractors (46%) reported that an average project value was within the range of €5,001-25,000.

The average value of a small landscaping project was €9,500 a medium project was €40,000 and a large project was €175,000

## Estimated Annual Turnover by Landscape Contractors



More than three quarters (77%) of all landscape contractors disclosed their annual turnover.

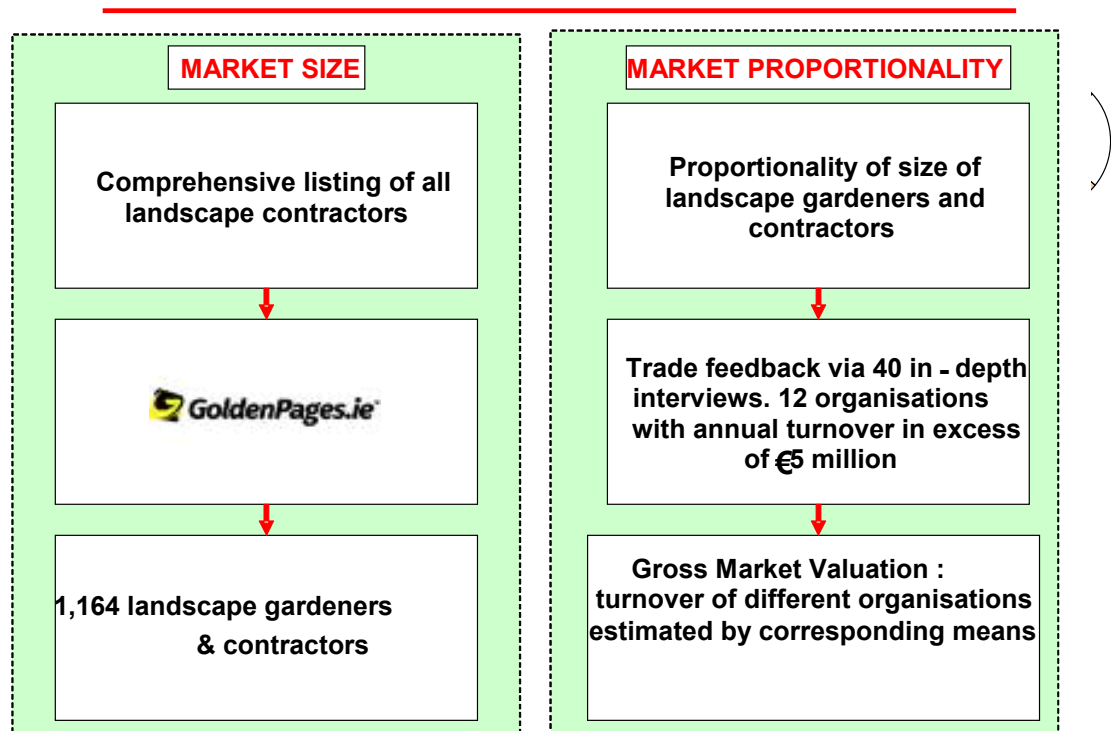
**The average annual turnover for landscape contractors was €863,500.**

1 in 4 (25%) claim to have had a turnover of up to €50,000 and 13% claimed to have had an annual turnover of 1 million or more.

### Implication

Landscape contractor companies are typically small or medium sized service oriented companies. In this regard they share many of the same problems as other small/medium sized enterprises. Cash flow, administration, business organisation, staff and management training are always on-going issues for small/medium sized businesses. Getting the best professional advice and training is important for such companies.

## Estimated Value of the Irish Landscape Industry



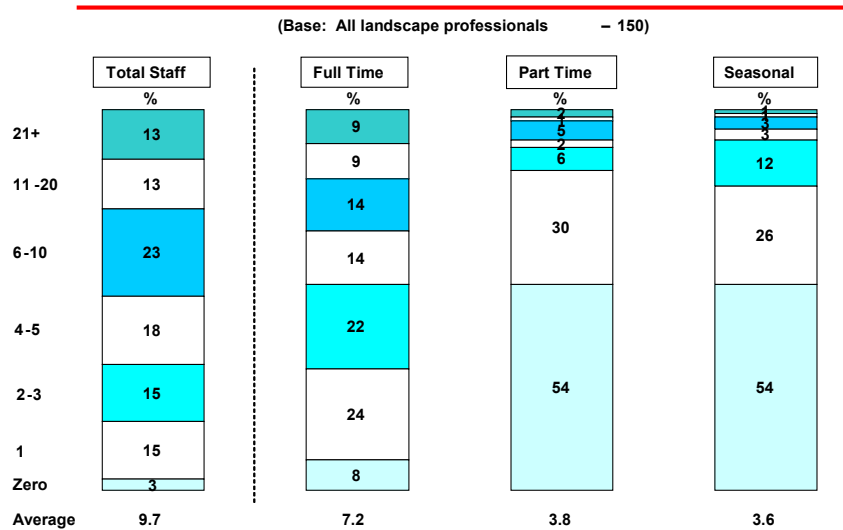
### Value of the Industry - Calculation Methodology

The Golden Pages was used as the most comprehensive listing of landscape contractors in Ireland. 1,164 landscape contractors were listed in the Golden Pages. Based on an estimated turnover given by landscape contractors this was grossed up to arrive at a total industry value.

The process began by establishing the number of larger landscape contractors with turnover in excess of €5m. Based on feedback from in-depth interviews amongst the 40 landscape professionals, it was estimated that there were about 12 landscape contractors who they would have expected to be turning over €5 million plus annually. The average turnover for all landscape contractors with a turnover greater than €5 million, (€17.5m) was multiplied by twelve to represent the value contribution to the industry of the larger landscape contractors (i.e. **€170.3m**). Similarly, an estimate was made for the further 139 medium sized landscape contractors who had a turnover between €1-5 million (their average turnover was €3m) – their collective turnover was estimated at **€417m**. The remaining 1,013 small contractors (with a turnover below €1m and an average turnover of €0.235m) were estimated to have a collective turnover of **€238.7m**.

When the value estimate of the large, medium and small sized contractors were combined, the total value of the Irish landscape industry was estimated to be **€826m**

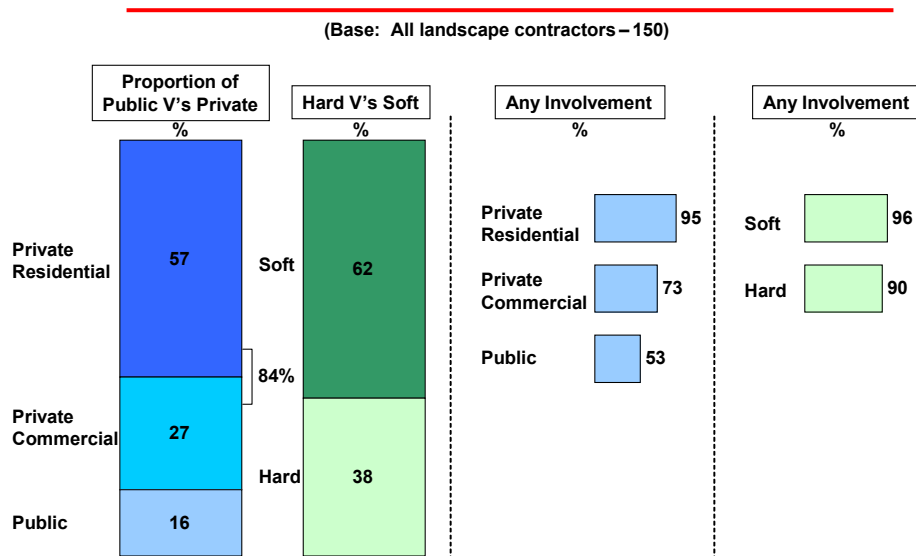
## Landscape Contractor – Overall Staff Sizes



The average number of employees in landscape contractor companies was just under 10 staff



## Landscape Contractor Involvement in Hard vs Soft Landscaping



57% of all work carried out by landscape contractors was conducted for private residential clients

27% of all work carried out by landscape contractors were conducted for private commercial clients and the remaining 16% of work was conducted for public clients. 95% of all landscape contractors were involved in carrying out work for private residential clients, and just over half (53%) were involved with work for public clients.

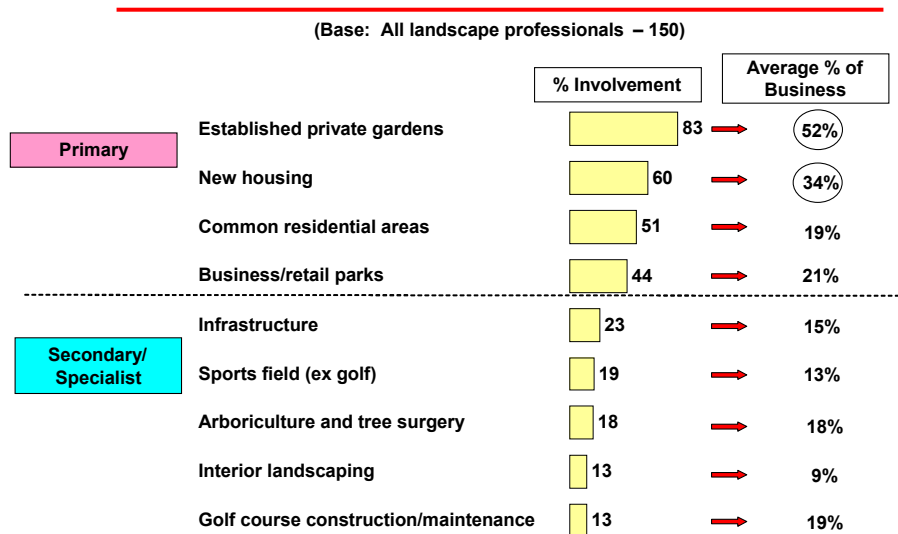
62% of all work carried out by landscape contractors was soft landscaping work while 38% was hard landscaping work

Almost all landscape contractors were engaged in both soft (96%) and hard (90%) landscaping type work.

### Implication

As 57% of all work carried out by landscape contractors are for private clients, understanding the needs of this group is essential. Section 2, of this report sets out a great deal of the broader landscaping agenda for this segment.

## Landscape Contractor Core Business Activities



The four primary areas of work that landscape contractors were involved in were work on established private gardens, new housing, common residential areas and business/retail parks

Work on established private gardens was the most important area for landscape contractors.

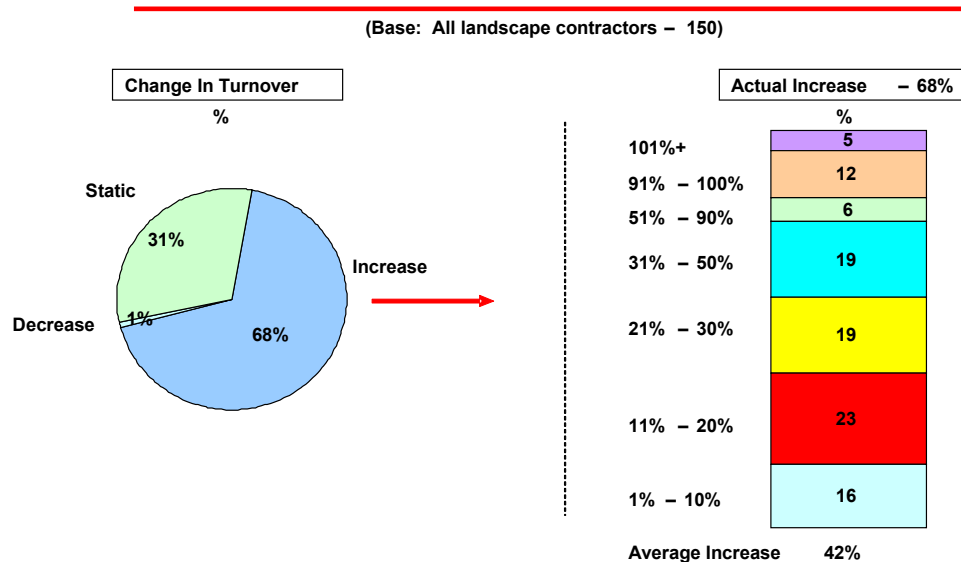
83% of all landscape contractors were involved in work on established private gardens which amounted to an average of 52% of all their landscaping business

Similarly, 60% of all landscape contractors were involved in work on new housing projects that accounted for 34% of their respective total business. 51% were involved in common residential area work and 44% with business/retail park work. These four work areas were the primary areas of involvement for landscape contractors.

### Implication

For most general landscape contractors there are four main areas of business. Knowing the needs and mindset of each of these clients/customer types is essential to providing a valued service.

## Landscape Contractors - Change in their Business Mix Over the Past 3-5 Years



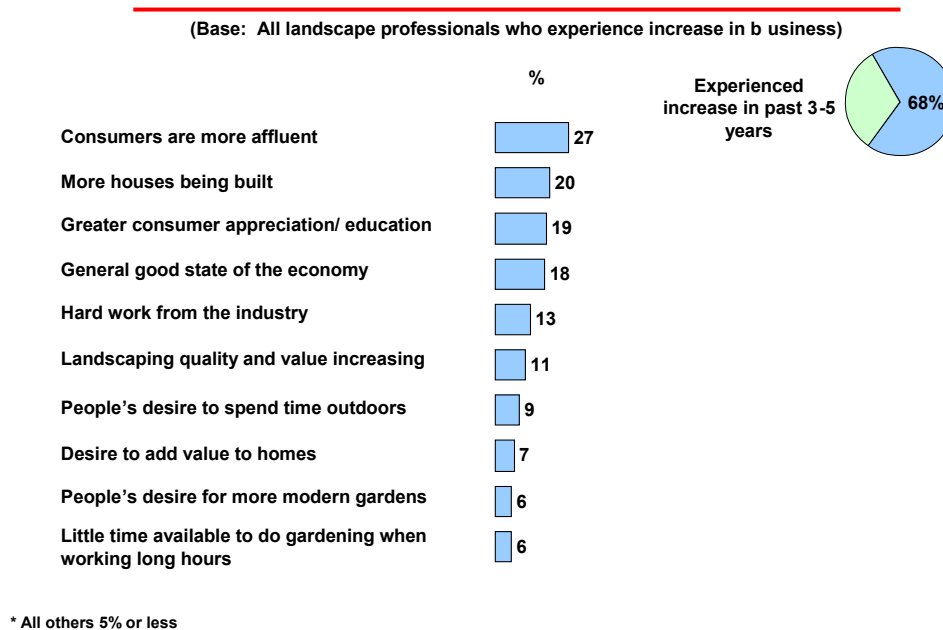
68% of all landscape contractors had experienced an increase in turnover over the past 3-5 years - the average increase experienced was 42%

31% had a no change in turnover, and 1% experienced a decrease over the same 3-5 years. Of the 68% who experienced an increase in turnover, the average increase was 42%.

### Implication

The landscaping industry in Ireland has experienced high growth rates in recent years which is largely a reflection of the general economic boom and in particular the high growth rates experienced in the construction industry. Businesses growing at such rates often experience problems in keeping apace of administration, business organisation and staff management. Getting the best professional advice and training is important to supporting such companies.

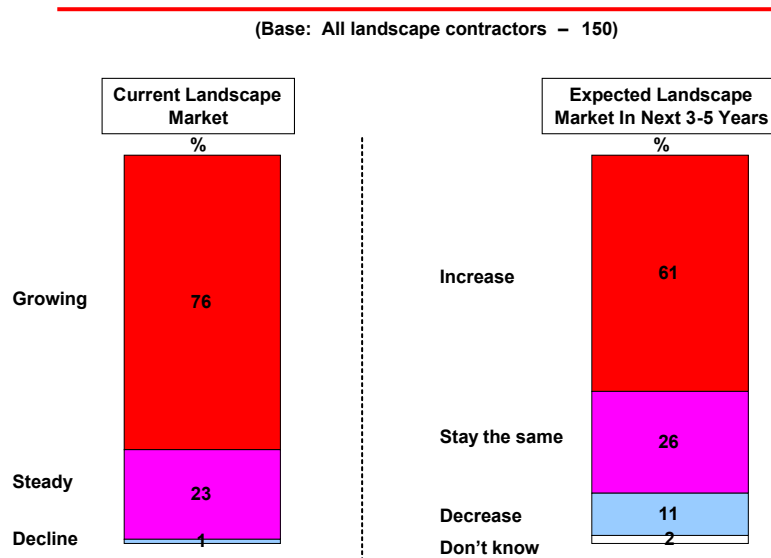
## Factors Driving Increased Business Levels Over the Past 3-5 Years



The survey explored what factors had driven the strong growth rates in landscaping over the past 3-5 years (responses were only taken from the 68% of landscape contractors who experienced an increase in turnover in the past 3-5 years).

- The factors driving the growth in business turnover were attributed primarily to:
- Consumers being more affluent (27%)
  - More houses being built (20%)
  - Greater consumer appreciation/education on landscaping (19%)
  - The general good state of the economy (18%)

## Perceived Landscape Industry Growth Rate



More than three quarters (76%) of landscape contractors felt that the landscape industry was still growing

Just over one-fifth (23%) felt that the landscape industry was steady and just 1% felt that the landscape industry was in decline.

The outlook for the next 3-5 years among landscape contractors was that 61% expected the market to increase in size

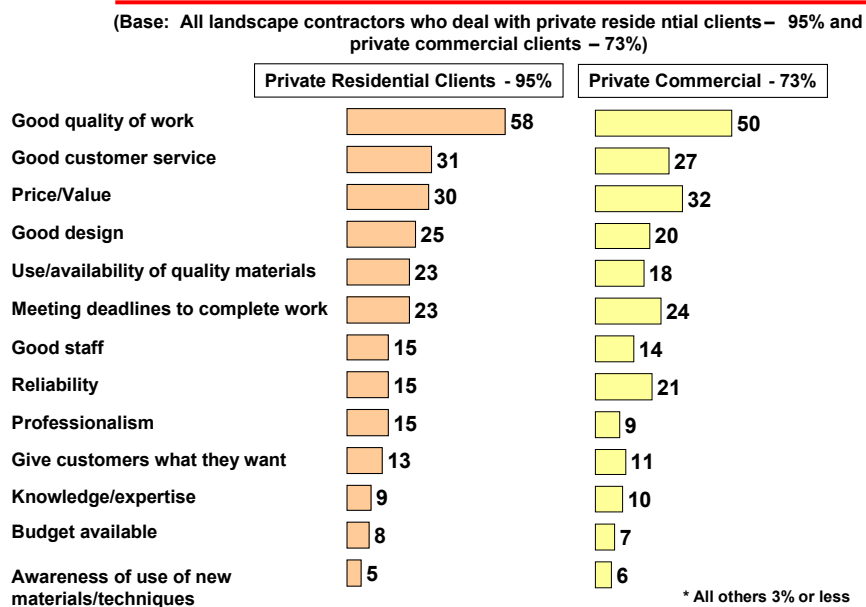
Just over one-quarter (26%) expected the market to stay the same, 11% expected a decrease and 2% didn't know.

### Implication

A mood of cautious optimism came through the research findings in relation to the current and expected growth rates of the Irish landscaping industry. The industry would appear to have grown in confidence in establishing its relevance, over the period of economic boom and it would appear confident to hold its ground into the future. This finding would point towards the continued need to educate and train landscape professionals based on a real need to improve service levels and replace staff.

## What is a Good Quality Landscape Job ?

### Landscape Contractors Perception of What a Good Quality Landscape Job Means for Private Residential and Private Commercial Clients



Landscape contractors saw the three most important components to delivering quality landscaping to private residential and private commercial clients as:

- Good quality of work
- Good customer service
- Good price/value

95% of landscape contractors surveyed dealt with private residential clients and 58% of these felt that good quality work was a key component to delivering quality landscaping to private residential clients. Good customer service (31%) and price/value (30%) were also cited as key components by these same landscape contractors.

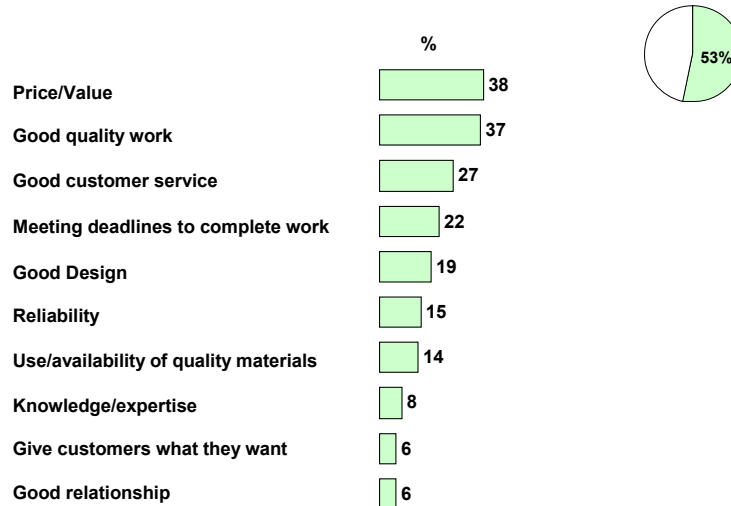
73% of landscape contractors surveyed dealt with private commercial clients and half (50%) of these felt that good quality work was a key component of delivering quality landscaping to these clients, followed by price/value (32%) and good customer service (27%).

### Implication

The three key components of delivering quality landscaping were the same for both private residential and private commercial clients/customers. Each landscape contractor must ensure the focus of their attention goes to improve these three elements on each specific job.

## Landscape Contractors Perception of What a Good Quality Landscape Job Means for Public Clients

(Base: All landscape contractors who deal with public clients – 53%)



\* All others 5% or less

Although landscape contractors saw the three most important components to delivering quality landscaping to public clients as being the same as private clients (good price/value, good quality of work, good customer service) there was much more of an emphasis on delivering a good price/value for money

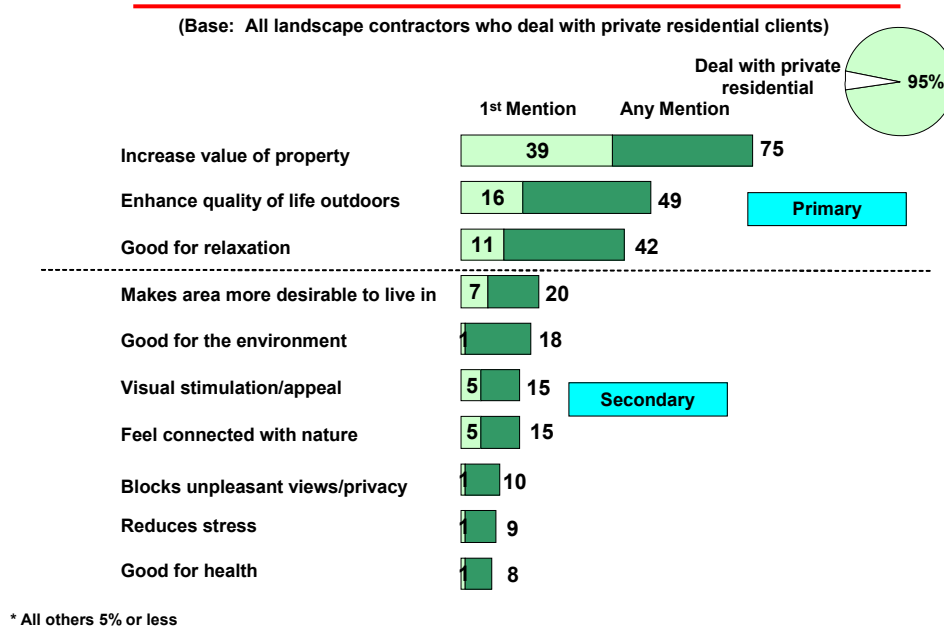
53% of landscape contractors surveyed dealt with public clients and almost two-fifths (38%) of these felt that price/value was the key component for delivering quality landscaping to these clients. This was followed by a similar percentage (37%) who stated that good quality work was essential and while good customer service was the third most popular response given by 27% of respondents.

### Implication

Public projects would appear to be highly price sensitive and demanding in that public clients want the best quality landscaping for the lowest possible price. Undoubtedly, this puts pressure on both the landscape contractor and the public client/customer to deliver these conflicting demands. The tender process is often the only means of screening projects but equal consideration must be given to the quality of the work and the price of it. Tender documents should clearly set out all requirements of the work and tender proposals should be highly specific in terms of what will be delivered.

## What Can Quality Landscape Jobs Deliver to Clients?

### Landscape Contractors Perception of What Quality Landscape Jobs Can Deliver to Private Residential Clients



Among all landscape contractors who dealt with private residential clients, the primary benefits of good quality landscaping for these clients were cited as:

- An increase in value of property (75%)
- Enhancement in the quality of life outdoors (49%)
- Quality landscaping was good for relaxation (42%)



## Landscape Contractors Perception of What Quality Landscape Jobs Can Deliver to Private Commercial Clients

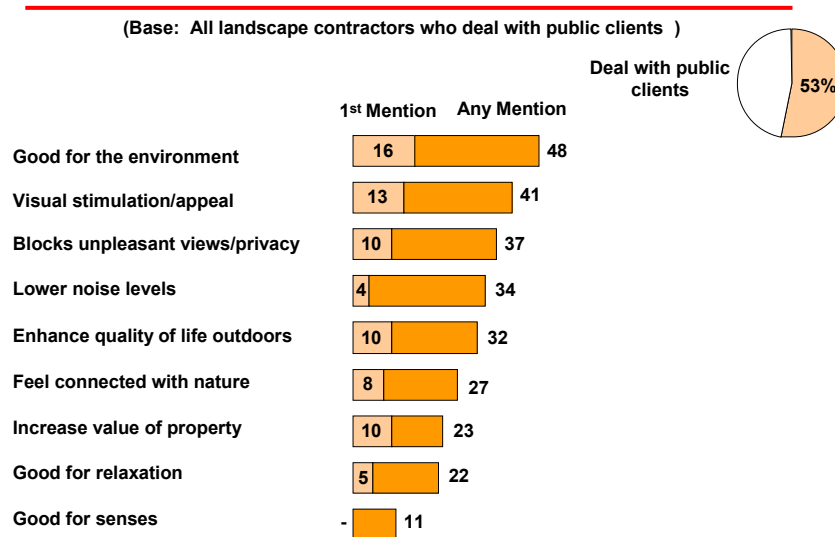


\* All others 5% or less

Among all landscape contractors who dealt with private commercial clients, the most important benefit to these clients was seen to be related to an increase in the value of their property (45%)

A wide range of other benefits were listed behind the increase in property value, namely that it provided a more pleasant environment for staff (35%), it was good for relaxation (35%) and it brought visual stimulation/appeal (33%).

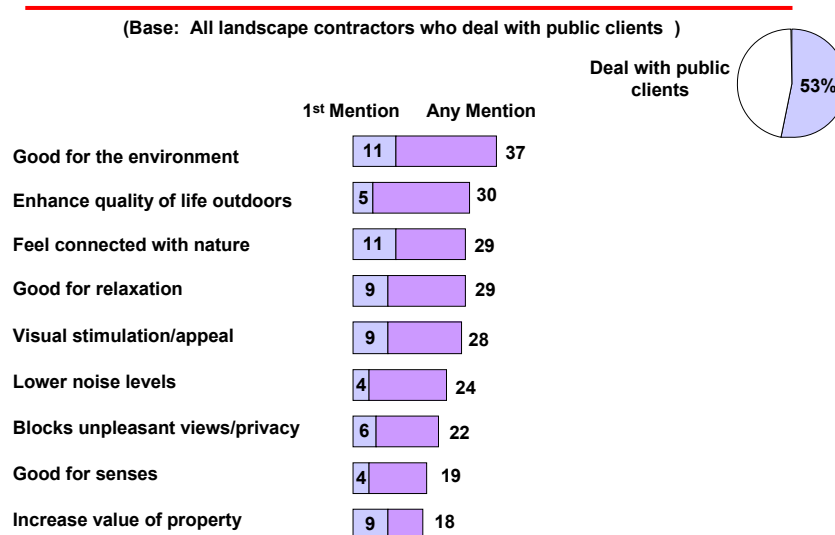
## Landscape Contractors Perception of What Quality Landscape Jobs Can Deliver to Public Industry Clients



Among all landscape contractors who dealt with public industry clients the perceived benefits of quality landscaping for these clients were that:

- it was good for the environment (48%)
- it provided visual stimulation/appeal (41%)
- it blocked unpleasant views/ gave privacy (37%)

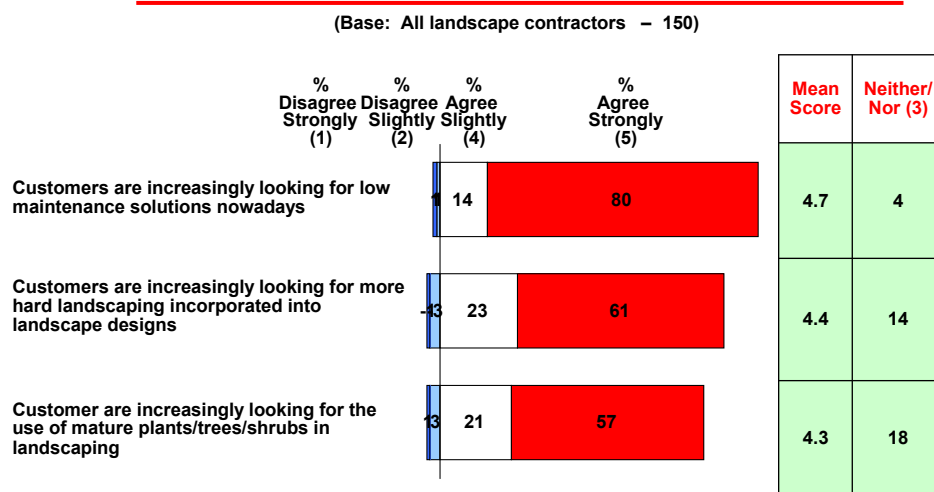
## Landscape Contractors Perception of What Quality Landscape Jobs Can Deliver to the General Public



Landscape contractors believed that the main benefits that quality landscaping provided for the general public were:

- It was good for the environment (37%)
- It enhanced the quality of life outdoors (30%)
- It helped people feel connected with nature (29%)
- It was good for relaxation (29%)

## Customer Attitudes to Low Maintenance, Hard vs Soft Landscaping & Maturity



8 in 10 landscape contractors agreed strongly that customers were increasingly looking for low maintenance garden solutions

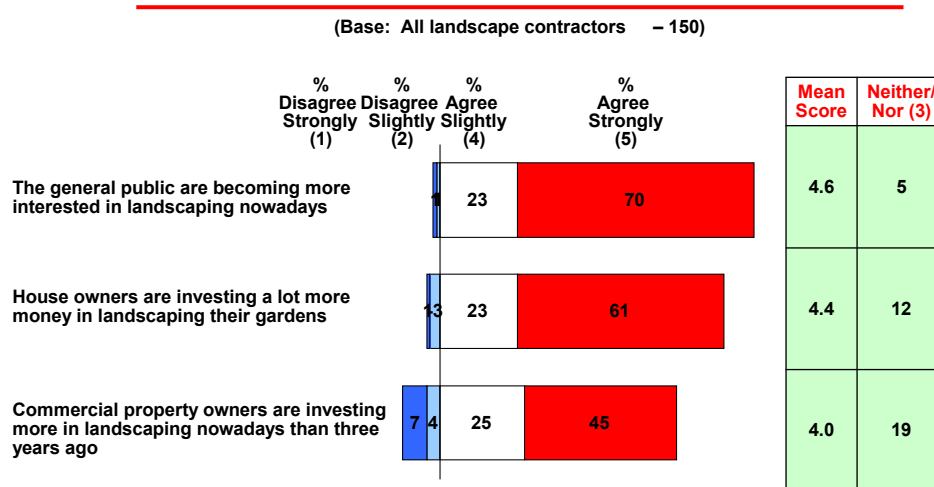
Just over 6 in 10 (61%) landscape contractors agreed strongly that customers were increasingly looking for more hard landscaping incorporated into landscape designs

57% of all landscape professional agreed strongly that customers were increasingly looking for the use of more mature plant/trees/shrubs in landscaping

### Implication

Gardening solutions involving low maintenance, hard landscaping and extra maturity in plants would appear to be the current thinking for landscape clients and consumers at certain life stages / of a certain level of gardening knowledge. Landscape professionals must keep abreast of all innovations in terms of new plants and materials that can deliver these elements to their clients.

## Customer Attitudes to Investment in Landscaping



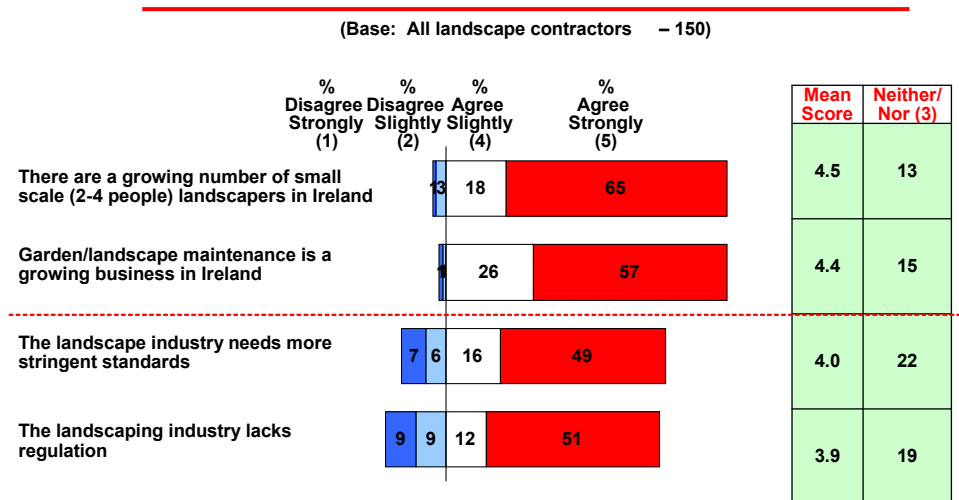
**70% of all landscape contractors agreed strongly that the general public were becoming more interested in landscaping**

61% agreed strongly that house owners were investing a lot more money in landscaping their gardens. 7 in 10 (70%) of all landscape contractors agreed slightly or strongly that commercial property owners were investing more in landscaping nowadays than three years ago. 11% of all landscape contractors disagreed with this statement.

### Implication

Landscape contractors are firmly of the opinion that there is a heightened level of interest in the general public and business community for gardening. This appetite must be met by providing these groups with more information on all aspects of gardening and assistance to choose quality oriented landscape professionals.

## Customer Attitudes to Landscape Standards and Regulation



More than 8 in 10 (83%) of all landscape professional agreed that there were a growing number of small scale (2-4 people) landscapers in Ireland. Similarly, 83% also agreed that garden/landscape maintenance is a growing business in Ireland.

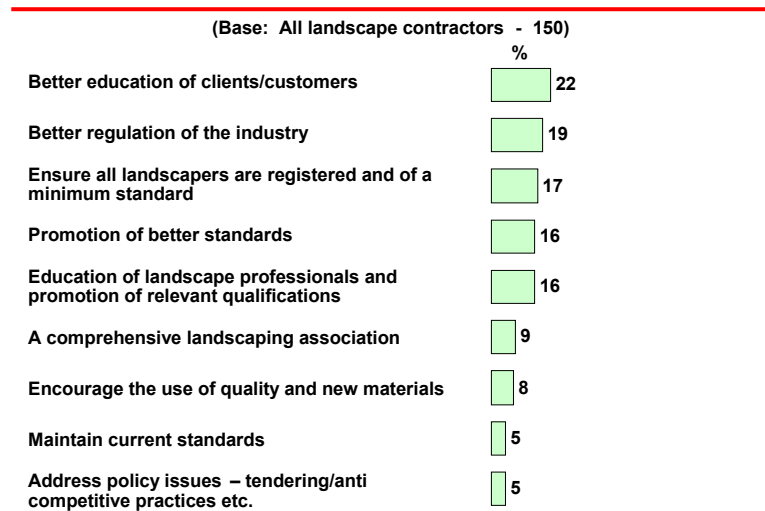
Almost 2 in 3 (65%) agreed strongly that the landscape industry needs more stringent standards. 63% agreed slightly/strongly that the landscape industry lacks regulation

13% and 18% respectively disagreed with the last two statements.

### Implication

Landscape contractors clearly recognise the problems arising from a lack of standards and regulation in the landscape industry. The industry needs to take this on board and find a way to accommodate this requirement. It is essential to ensure clients/customers have a benchmark to judge quality oriented operators from poorer operators.

## Attitudes to Improving the Landscape Industry in Ireland



\* All others 5% or less

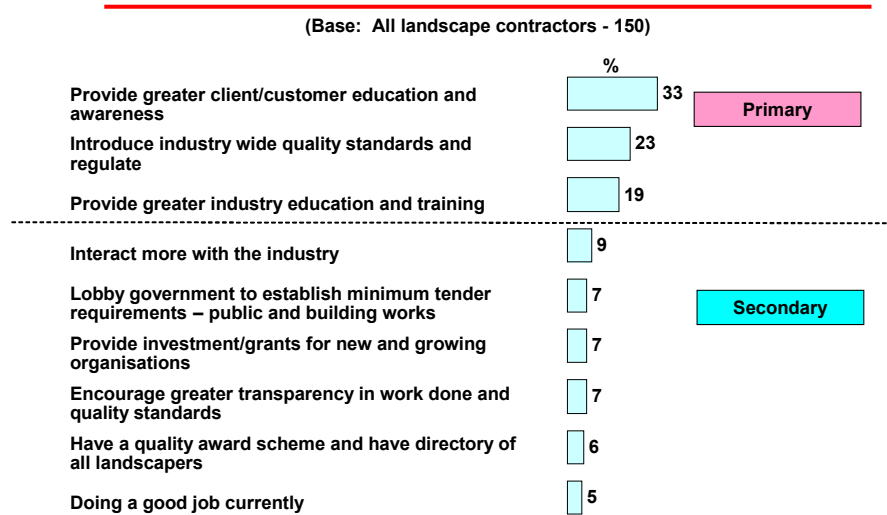
Landscape contractors had a wide range of suggestions on what needed to be done to improve the landscaping industry as a whole:

- More than 1 in 5 (22% felt that better education of clients/customers was required)
- 19% said that better regulation of the industry was required
- 17% said that it was important to ensure that all landscapers were registered and of a minimum standard
- 16% believed that both promotion of better standards and education of landscape contractors and promotion of relevant qualifications was required

### Implication

Landscape contractors clearly see education of clients/customers and the introduction of more stringent standards/better regulation as the way to improve landscaping industry. This needs to be addressed by the industry as a whole.

## Further Development Role for Bord Bia in the Landscape Industry



(\*all others less than 5%)

Landscape contractors believed that Bord Bia could play a role in the development of the landscape industry by supporting industry initiatives to:

- provide better client/customer education and awareness (33%)
- introduce industry wide quality standards and regulate (23%)
- provide better industry education and training (19%).







