

Plant area profitability: a guide to link sales



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Introduction and summary



This guide brings together statistical analysis of over 7 million garden centre transactions in the HTA's Garden Retail Monitor (GRM) to identify link-sales relationships and opportunities for retailers around plants. The data is backed throughout by real-world merchandising and marketing examples that drive link-sales from the industry. Our aim: to provide useful content and discussion points for HTA and GCA member businesses on improving customer success and business performance.

Our analysis, of course, cannot cover or do full justice to the full range of plants on offer in garden centres, nor indeed the unique qualities of individual garden retailers. We would like to qualify the analysis and suggestions in this guide by acknowledging that one of the key strengths of UK garden centres is their individuality and the unique customer experiences they provide. In this guide our aim is not to advocate a 'one-size-fits-all' approach, but rather to provide insights and ideas that can be adapted in different retail situations. Much of the content in this guide will simply serve to confirm the excellent practice in many garden centres. Our aim with this guide is not to present 'ground-breaking' insights; rather we aim to provide interesting 'food for thought' around incremental developments or ideas that could be tried out, all backed up with real sales data and examples of real-world application that could be learned from.



Theme One - planting for a vertical space

There appears to be a distinctive shopping mission around purchasing plants to fill a vertical space. Key suggestions to capitalise on this are:

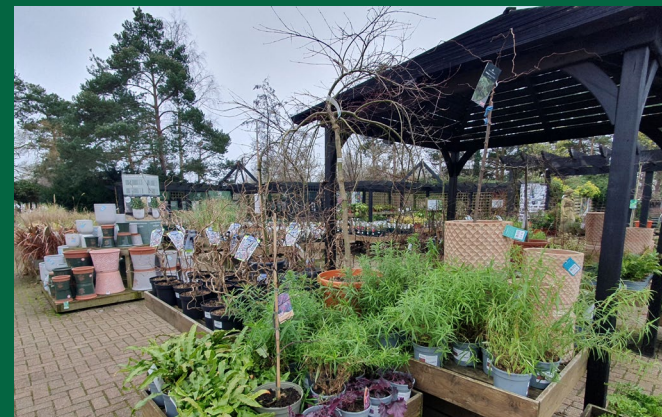
Make it easy for shoppers to find and remember to purchase items that support vertical and climbing plant growth

Wherever climbing plants are on display, ensure that there is customer suggestion or direction to where categories are such as trellis, arches, plant support products or other items through which plants can grow to height can be found. This may include co-locating some of these items with the climbing plants, or providing displays which feature some of these plants with pergolas, trellis, obelisks, arches, etc. Consider also providing point-of-sale information, signage or maps in the plant area as to where these items can be found.



Maximise container, plant pot and garden structures sales opportunities around climbers and other plants that grow to fill vertical garden space

Ensure that higher value and margin outdoor containers are close to plants associated with height (climbers, specimen plants, trees, etc). Consider showcasing or merchandising plants of height alongside each other, in high margin outdoor containers and potentially alongside products such as obelisks, arches, or trellis, showcasing a 'look' or series of looks for the garden that fill vertical spaces – perhaps against fences or walls – in a garden.



Theme One - planting for a vertical space

Help shoppers to find the right feeds and growing media for climbers, shrubs or trees

Position some specialist growing media and feeds adjacent to climbers, trees, shrubs and specimen plants. Our analysis suggests that shoppers have a propensity to make purchases such as feeds and growing media (for instance rose, tree & shrub mixes) that support plant growth, which is perhaps natural given their relatively high price and expected longevity. There may also be a (perhaps subconscious) desire to ensure the plants grow into vertical space.



Inspire shoppers with the potential for plants in vertical spaces

In promotional activity in the run up to the garden season (newsletters, social media, etc), or through in-store signage and displays, consider ways of helping shoppers visualise the impact of filling spaces in their gardens with plants that provide height. Helping shoppers visualise this and providing suggestions for climbers, trees, and specimen plants which can thrive in containers has the potential to drive footfall into store. Consider featuring high-value linked items such as arches, obelisks in such promotions, and informing gardeners about 'how to' achieve success through appropriate use of feeds, growing media, ties and stakes, trellis, and so forth.



Theme Two - link sales from bedding and similar plants

The high volumes of bedding transactions present opportunities to increase profit from even slight increases in link-selling. Key suggestions to capitalise on this are:

Showcase ideas for combining bedding and other plants in container situations

Our analysis shows a strong association between bedding and similar size plants which lend themselves to container planting, such as alpines, grow-your-own, and herbaceous. We'd conclude from this and from the strong associations between bedding and purchases of containers and pots that this is driven by the desire to plant out either a new container, or an existing one already in the garden. Consider whether increased unit sales of plants could be achieved by ensuring that categories such as alpines, heathers, and herbaceous plants are within easy reach of each other and (as far as possible) within line-of-sight of each other.



Use hanging baskets and container combinations to provide inspiration for shoppers

Showing ready-planted hanging baskets and containers alongside pack and pot bedding displays (or displays of similarly sized plants) can drive additional sales. Sales of empty hanging baskets are very dependent on bedding sales – 24% of sales of empty hanging baskets occur in transactions which also contain pack bedding; displaying bedding planted out in hanging baskets or outdoor containers can drive link sales and margin. Ensuring that outdoor containers are within easy line-of-sight from bedding plants will support this, as will ensuring that empty hanging baskets are displayed close to bedding plants, or are easily visible en-route to the till.



Theme Two - link sales from bedding and similar plants

Maximise multi-buys and offers across categories

Multi-buy offers for bedding can often be restricted just to the bedding category, for example in 3 for 2 offers and so forth. However, the strong associations between bedding and other categories such as containers and baskets, as well as similarly-sized and priced plant categories suggests an upsell opportunity beyond bedding. For instance, there is potential to grow transaction values and margins through offers which use bedding purchases to 'unlock' an offer on high value and/or high margin pots, containers, feeds, or other similarly priced plant categories which lend themselves to container planting. Indeed, there is the potential with these types of offer to create a virtuous circle, using increased volumes of sales of these plants to create a need for more containers in which to plant them.



Ensure some specialist growing media, feeds and other products which support successful container planting are on display adjacent to bedding

Given the strong associations between bedding and container planting, ensure that specialist growing media (for instance those specially formulated for hanging baskets or with moisture retaining qualities) are displayed near to bedding displays. There is a lower association between sales of plant feeds and bedding compared with other categories of plants; this suggests an opportunity to educate shoppers as to the increased need for feeding bedding in order to achieve great results driven by peat-free growing media. This could be supported by displaying plant feeds formulated to support healthy flowering alongside bedding, as well as with other items designed to ensure good container planting results such as moisture retaining gels.



Theme Three - maximise shoppers' 'grow your own' missions

There is a distinctive shopping 'mission' around grow-your-own. Shoppers with this mission are more pre-disposed than with other plant categories to invest in the feeds, plant sundries, growing media and other categories in order to achieve a successful crop. Key suggestions to capitalise on this are:

Display growing media, fertilisers and manures within line-of-sight of grow-your-own displays

Grow-your-own plant categories are the most likely plant category to have a link-sale association with plant feeds. However, there is still substantial up-sell potential, with 8.2% of sales of vegetable and fruit plants also having a plant feed in the transaction. Stressing the need to feed fruit, vegetable and salad crops in order to achieve optimum results presents a clear opportunity to increase sales values, and drive repeat purchasing as shoppers look to replicate success in future years. 22.9% of transactions containing fruit and vegetable plants also contain growing media, so displaying growing media specifically designed for specific grow-your-own crops such as grow bags is also an opportunity to support customer success with their grow-your-own projects whilst increasing transaction values.



Create a 'grow-your-own' zone in the plant area

There are very strong link-sales associations between fruit trees, herbs, and fruit & vegetable plants. For instance, 21% of transactions which contain fruit trees or bushes also contain vegetable and fruit plants, and 14% of transactions which contain vegetable and fruit plants also contain herbs. Indeed, the association between fruit trees & bushes and fruit and vegetable plants is far stronger than that between fruit trees & bushes and other trees. With this in mind, ensuring that zones which include these plants are adjacent to each other is likely to support link-sales.



Theme Three - maximise shoppers' 'grow your own' missions

Anticipate and satisfy the need for pest control that shoppers associate with grow-your-own

Our analysis shows that 3.3% of transactions of vegetable and fruit plants also contain items from the pesticide/fungicide category; that's over 40% more likely than for pack bedding (2.2%). This suggests shoppers purchase in the grow-your-own category with half an eye on protecting their crops. This presents an opportunity for link sales, for instance by displaying these items and others associated with crop protection such as nets, close to or in any grow-your-own zone. However, it also presents an opportunity to cross-sell grow-your-own plants, for instance by providing information at the point of sale on companion planting as a means of pest control and laying out or merchandising plants on the benches accordingly.



Capitalise on shopper expectations that growing their own will be an ongoing (enjoyable!) project

Our analysis shows strong associations between sales of grow-your-own plants and plant support categories such as propagation, greenhouse accessories, plant support, plastic pots, and feeds. As well as ensuring that these ranges are easily 'happened upon' through store layout, there are promotional opportunities for retailers to educate consumers about the items which help ensure success with a grow-your-own project. This is likely to be especially pronounced in early season purchases in the grow-your-own category, with shoppers likely to be looking to raise young plants to maturity, transferring them through different containers, and protecting them from unseasonable weather.



Theme Three - maximise shoppers' 'grow your own' missions

Try to link outdoor and indoor grow-your-own sales

The data shows a strong association between sales of grow-your-own plants, packet seeds of edible plants, and seed potatoes. No similarly strong link exists between flower seeds and flowering plants. This suggests potential link sale benefits in making sure vegetable and fruit seeds, and seed potatoes are among the very first things shoppers see as they come indoors from the plant area.



Many of these suggestions are far from new – indeed many of them are already at play and working in garden centres. That said, we hope this guide either confirms and provides either reassurance about what you're currently doing, or provides one or two new ideas to test out in order to generate additional sales. And, whilst most of these suggestions won't be new to seasoned plant area staff, we hope they will be instructional to newer members of plant area teams. The rest of this guide expands upon these suggestions, and sets out the detailed data analysis which supports them.

Theme One

Capitalising on shopping missions for plants that fill a vertical space



Capitalising on shopping missions for plants that fill a vertical space



The GRM data shows associations that suggest there is likely to be a set of purchase ‘missions’ for shoppers which are driven by a desire to fill vertical spaces, likely against garden walls and fences, and in some cases in a patio/container gardening context. Plants with higher unit prices such as climbers, roses, specimen plants, trees and shrubs are most likely to be associated with this type of purchase occasion, which is in turn associated with purchases of higher value outdoor pots and containers. There is also a strong association with items which either physically support vertical growth (trellis, plant support), and ‘fuel’ healthy plant growth into this vertical space in the garden (feeds, growing media, watering equipment).

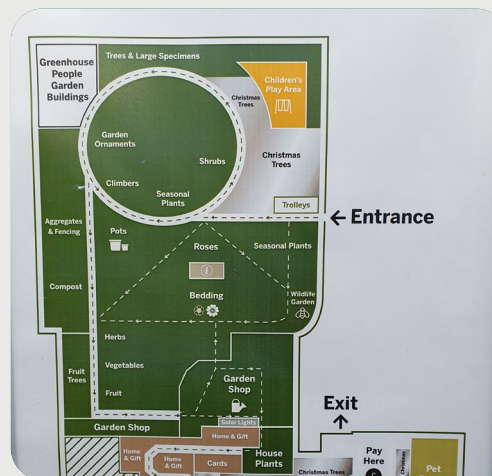
Based on the data, the following suggestions have the potential to increase transaction values and shopper satisfaction.



Suggestion One

Make it easy for shoppers to find and remember to purchase items that support vertical and climbing plant growth

Wherever climbing plants are on display, ensure that there is customer suggestion or direction to where categories such as trellis, arches, plant support products or other items through which plants can grow to height can be found. This may include co-locating some of these items with the climbing plants, or providing displays which feature some of these plants with pergolas, trellis, obelisks, arches, etc. Consider also providing point-of-sale information, signage or maps in the plant area as to where these items can be found: the average shopper only visits a garden centre 3 or 4 times a year, and won’t know your centre as well as you do.



Capitalising on shopping missions for plants that fill a vertical space

Suggestion Two

Maximise container, plant pot and garden structures sales opportunities

Ensure that higher value and margin outdoor containers are close to high-value plants associated with height (climbers, specimen plants, trees, etc); there are particularly strong associations between stoneware and other outdoor containers and climbing plants. Consider showcasing or merchandising plants of height alongside each other, in high margin outdoor containers and potentially alongside products such as obelisks, arches, or trellis, showcasing a 'look' or series of looks for the garden.



Suggestion Three

Support shoppers in finding the right feeds and growing media

Position some specialist growing media and feeds adjacent to climbers, trees, shrubs and specimen plants. The GRM data suggests that shoppers appear to have a propensity to make purchases such as feeds and premium growing media, which ensure the success of these types of plants, which is perhaps natural given their relatively high price. There may also be a (perhaps subconscious) desire to ensure the plants grow into vertical space. This may be an opportunity to upsell specialist growing media (for instance rose, tree & shrub mixes,) as well as any specialist feeds.

Capitalising on shopping missions for plants that fill a vertical space

Suggestion Four

Inspire shoppers with the potential for plants in vertical spaces

In promotional activity in the run up to the garden season, for instance in email newsletters, door drop, social media posts, or website features, consider ways of helping shoppers visualise the impact of filling garden spaces with plants that provide height. Helping shoppers visualise this and providing suggestions for climbers, trees, and specimen plants which can thrive in containers has the potential to drive footfall into store around this type of 'project'. There is the opportunity in this sort of gardening content to feature high-value linked items such as arches and obelisks. There is also an opportunity to inform gardeners about 'how to' achieve success through appropriate use of feeds, growing media, ties and stakes, and so forth.



Link-sales opportunities from plants for vertical spaces

Supporting data and analysis

Over the course of a year, climbing plants are a comparatively small category, featuring in around 1.3% of a garden centre’s transactions, and they account for 1% of a garden centre’s sales. Perhaps unsurprisingly, there is a strong association between climbing plants and the following plant categories (‘If Climbing plants are purchased, then plant category x is also purchased’).

Plant categories associated with climbers	% of items in that category that are purchased in a transaction in which climbers are also present	Lift value ¹
Specimen plants	5%	3.87
Roses	5%	3.44
Shrubs	4%	3.37
Trees	4%	3.24

The stronger association of climbers with other plants with height (as opposed to, say, and pack bedding or planted baskets and containers, with comparatively low lift factors of 1.48 and 1.01 respectively) suggests some shopping occasions are driven by considerations of height and filling vertical space in the garden. This is further supported by the strong associations of non-plant categories with transactions which contain climbing plants.

Strongest associations are with categories which support vertical growth such as trellis or plant support, and ‘high end’ containers and pots:

Non-plant categories associated with climbers	Percentage of items in that category that are purchased in a transaction in which climbers are also present	Lift value ¹
Fencing, trellis and decking	7%	4.99
Metal containers	3%	2.39
Wooden containers	3%	2.27
Glazed containers	3%	2.20
Plant support	3%	2.15
Stoneware pots	3%	2.13

¹ The higher the lift value, the greater the strength of the link sales relationship between categories. A value greater than 1.0 indicates that a link-sales relationship exists, and a value less than 1.0 indicates that no relationship exists. See appendix for an explanation of ‘lift’ and how it is calculated.

Link-sales opportunities from plants for vertical spaces

Supporting data and analysis

To some extent, the strong associations between climbers and ‘high end’ containers and pots are likely also to be driven by the purchase of high value plants with a clear vertical aspect in the same transactions that include climbers. We’d conclude that these associations may be pointing to a shopping ‘mission’ driven by shoppers looking to fill a vertical space in the garden by combining plants with vertical height, high-end plant containers, and a garden wall/fence setting. Evidence to support this idea of a shopping mission centred around filling a vertical space(s) in the garden is that there is also a strong association between transactions containing climbing plants and products which either boost plant growth or suggest a patio/wall/fence setting:

Other notable categories associated with climbers	Percentage of items in that category that are purchased in a transaction in which climbers are also present	Lift value ¹
Growing media	2%	1.77
Woodcare	2%	1.63
Plant feeds	2%	1.58
Plant care products	2%	1.52

Of course, it’s also important to note that as a relatively small category, climbers by themselves do not drive a substantial proportion of sales in major categories such as growing media – only two percent of transactions of growing media also contained a climber. However, although categories such as plant feeds are associated positively with other plant categories such as pack bedding, the association is stronger with climbers. The association also holds true for higher-value plants such as roses (1.55) and specimen plants (1.60). Looked at another way, 7% of climbers (and also roses) are sold with feeds, compared with 5.5% of pack bedding; in short, the data suggests consumers are more expectant of the need to feed climbers and other plants they expect to last, and to grow into the space looking to be filled.

¹ The higher the lift value, the greater the strength of the link sales relationship between categories. A value greater than 1.0 indicates that a link-sales relationship exists, and a value less than 1.0 indicates that no relationship exists. See appendix for an explanation of ‘lift’ and how it is calculated.

Theme Two

Maximising link sales from bedding and similar plants



Maximising link sales from bedding and similar plants



Over the course of a calendar year, pot bedding and pack bedding feature in 8% and 12% of garden centres transactions as recorded in the GRM. In many respects, and certainly from April to June, it's the workhorse of the plant area, satisfying shoppers' need for colour and vibrancy. In terms of the proportion of a garden centre's turnover, the categories account for around **5.5% and 3.1%** of total business turnover per annum. This scale holds substantial potential to deliver link-sale value, which our analysis supports.

In non-plant categories there is an opportunity to link sell around containers, and growing media. There is also a potentially under-realised opportunity for fertilisers, particularly those with an NPK balance suited to encouraging strong and lasting flowering displays. The associations between bedding and other categories of plants suggest the strongest link sales relationships between bedding and plant categories of similar sizes, specifically sizes which lend themselves to container or basket planting.

In short, the statistical analysis supports a conclusion that many shoppers arrive at garden centres with 'missions' to fill (or re-fill) pots and baskets or ground-level spaces in their gardens by combining plants across to achieve striking and colourful looks and forms. Based on the data, the following suggestions have the potential to increase transaction values and shopper satisfaction.

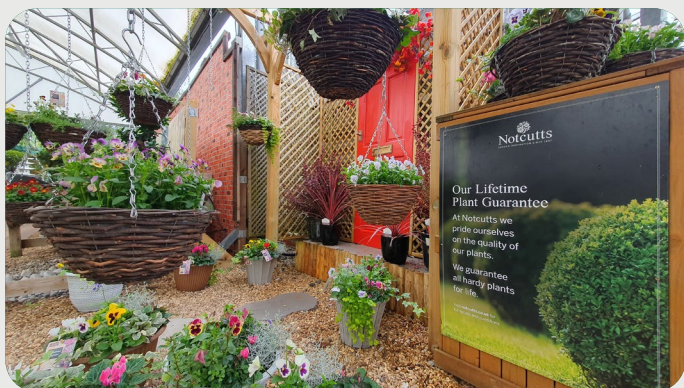


Maximising link sales from bedding and similar plants

Suggestion One

Showcase ideas for combining bedding and other plants in container situations

Our analysis shows a strong association between bedding and similar size plants which lend themselves to containers, such as alpines, grow-your-own, and herbaceous; we'd conclude from this and from the strong associations between bedding and purchases of containers and pots that this is driven by the desire to plant out either a new container, or an existing one already in the garden. Consider whether increased unit sales could be achieved by ensuring that categories such as alpines, heathers, and herbaceous plants are within easy reach of each other and (as far as possible) within line-of-sight of each other. Showcasing this in promotional activity that aims to drive footfall into store also has the potential to help shoppers form ideas for purchasing across different plant categories.



Suggestion Two

Use hanging baskets and container combinations to provide inspiration

Showing ready-planted hanging baskets and containers alongside pack and pot bedding displays (or displays of similarly sized plants) has the potential to provide inspiration to consumers and drive additional sales of items. Sales of empty hanging baskets are particularly dependent on bedding sales – 24% of sales of empty hanging baskets and 21% of sales of metal containers occur in transactions which also contain pack bedding for instance. To this extent displaying bedding planted out in hanging baskets or outdoor containers has the potential to drive link sales and additional margin. Ensuring that outdoor containers and pots are within easy line-of-sight from bedding plants will support this, as will ensuring either that empty hanging baskets are displayed close to bedding plants, or ensuring that empty baskets are easily visible en-route from the benches to the till.



Maximising link sales from bedding and similar plants

Suggestion Three

Maximise multi-buys and offers across categories

Multi-buy offers for bedding can often be restricted within the bedding category, for example if 3 for 2 offers and so forth. However, the strong associations between bedding and other categories such as containers and baskets, as well as similarly-sized and priced plant categories suggests an upsell opportunity beyond bedding. For instance, there is potential to grow transaction values and margins through offers which use bedding purchases to ‘unlock’ an offer on high value and high margin pots, containers, feeds, or other similarly priced plant categories which lend themselves to container planting. Indeed, there is the potential with these types of offer to create a virtuous circle, using increased volumes of sales of these plants to create a need for more purchases of containers in which to plant them.



Suggestion Four

Display some specialist growing media, feeds and other products which support successful container planting adjacent to bedding

Given the strong associations between bedding and container planting, ensure that specialist growing media (for instance those specially formulated for hanging baskets or with moisture retaining qualities) are highlighted near to bedding



displays; ensure too that any merchandising or point of sale information around growing media also makes this connection. There is a lower association between sales of plant feeds and bedding compared with other categories of plants; this suggests an opportunity to educate shoppers at the point of sale as to the increased need for feeding bedding in order to achieve great results driven by peat-free growing media. This could be supported by displaying plant feeds formulated especially to support healthy flowering alongside bedding, as well as with other items designed to ensure good container planting results such as moisture retaining gels.

Link-sales opportunities from bedding plants

Supporting data and analysis

As we've already noted, bedding plants are the 'workhorse' of many plant areas. There are strong associations between pack and pot bedding and categories that are related to container gardening. The following table shows the non-plant categories which are most likely to be associated with or driven by a purchase of pot or pack bedding:

Non-plant categories associated with bedding plant purchases	Percentage of transactions in that category which also include bedding (Pack) (Pot)	Lift value ¹ (Pack) (Pot)
Empty hanging baskets	(24%) (29%)	(2.93) (2.41)
Metal containers	(21%) (26%)	(2.58) (2.10)
Growing media	(13%) (18%)	(1.61) (1.46)
Glazed containers	(10%) (19%)	(1.24) (1.56)

The clear, (and perhaps unsurprising) insight is in the clear extent to which purchases of growing media and containers are influenced by purchases of bedding.

The data also provides insights into categories which are not so obviously associated with purchases of bedding. For instance, transactions which include bedding plants are less likely to influence purchase of plant feeds than transactions which include other types of plants. Whereas the lift factors for pack and pot bedding on plant feeds are 1.25 and 1.24 respectively (which does show a positive association), the lift factors are far higher for many other types of plants. This suggests that shoppers are less pre-disposed to purchasing feeds to ensure successful and lasting flowering of bedding than they are, say, for grow-your-own plants. Indeed, a higher proportion of transactions of cacti have plant feeds in them than pack or pot bedding:

Category of plant	Percentage of transactions for that plant category that also contain plant feeds	Lift value for plant feeds
Vegetable and fruit plants	8.2%	1.84
Fruit trees and bushes	7.2%	1.61
Herbs	7.1%	1.59
Cacti	6.9%	1.55
Herbaceous	5.9%	1.32
Pack bedding	5.5%	1.25
Pot bedding	5.5%	1.24
Alpines	5.4%	1.23
Trees	5.4%	1.22
Conifers	4.4%	1.00
Air plants	4.0%	0.91

Link-sales opportunities from bedding plants

Supporting data and analysis

In short, the second table on the preceding page shows us that there is a far stronger link-sales association with plant feeds between for grow-your-own plants than for bedding. On the one hand that might not be too surprising, with gardeners likely being motivated to do all they can to achieve the juiciest strawberries or tomatoes, and less motivated to invest in feeds for bedding which might only be expected to last for several weeks to a few months. On the other hand, it may suggest an opportunity to increase link sales of plant feeds from the bedding category by stressing the need for feeding as bedding plant production transitions increasingly to peat-reduced and peat-free mixes. Indeed, ensuring shoppers appreciate the need to feed bedding for long-lasting and colourful results may be an under-tapped opportunity.

When we look at the other plant categories which are most commonly associated with sales of bedding plants, we can see that almost all categories of plants retailed in garden centres show a strong association with pot and/or pack bedding. The following table on the right shows the lift factors of other plants:

It's noticeable that the strongest lift factors (which are indicative of a strong link-sales relationship between the categories) are between sales of bedding categories of plants such as alpines, heathers, and grow-your-own, where the plant height/size and required container sizes are most likely to be similar. This, taken with the strong association between bedding, growing media and pots & containers suggests that many shoppers are likely to be shopping with a view to creating an impact around container planting, with some potential to be inspired by combinations of plants across categories which lend themselves well to container planting.

In this sense, the data is showing a strong association between plants which are of a similar size to lend themselves to this type of planting or 'look/situation' in the garden, and not necessarily just by searching for a particular botanical 'type' of plant. In the context of autumn gardening, we should also note the strong association between bedding plants and bulb sales. Given the concentration of spring bulb sales in the September to November period, this suggests an autumnal opportunity to ensure that shoppers searching for bulbs for the following spring also take away autumn bedding to provide a splash of autumn and winter colour for their pots, containers and baskets.

Plant category	Percentage of transactions of pack bedding which also contain that plant category	Lift value
Pot bedding	36%	2.96
Heathers	2%	2.63
Vegetable/fruit plants	7%	2.04
Herbs	5%	2.00
Alpines	5%	1.99
Conifers	1%	1.90
Herbaceous	15%	1.86
Shrubs	11%	1.62
Bulbs (spring/summer)	5%	1.57
Fruit trees & bushes	1%	1.54
Climbers	2%	1.48
Roses	2%	1.13

Theme Three

Maximising link sales from grow-your-own shopping missions



Maximising link sales from grow-your-own shopping missions



Historical consumer surveys run by the HTA show that uncertain and economically challenging times are often accompanied by an uptick in the grow-your-own category. This tends to be driven by a deep-seated consumer need for a sense of control and agency over their surroundings, and for the sense of self-sufficiency. That aside, nor should we lose sight of the immense satisfaction and enjoyment to be derived from success with the category. The grow-your-own plants category accounts for 8.2% of total garden centre plants sales value, making it a substantial category in its own right. Our analysis shows shoppers being prepared to invest categories which ensure success with their crops, often in a container situation. There is also a very strong and distinctive 'grow-your-own' shopping mission, which drives link-sales opportunities beyond the plant area, for instance in sales of vegetable seeds and seed potatoes which are displayed indoors. Based on the analysis of the data, the following tips have the potential to drive up transaction values and margins from the grow-your-own shopping mission undertaken by many gardeners.



Suggestion One

Display specialist growing media, fertilisers and manures within line-of-sight of grow-your-own displays

Grow-your-own plant categories are the most likely to have a link-sale association with plant feeds. However, there is still substantial up-sell potential, with 8.2% of sales of vegetable and fruit plants also having a plant feed in the transaction. Stressing the need to feed fruit, vegetable and salad crops in order to achieve optimum results, perhaps contextualising this in the benefits of feeding plants grown in peat-free growing media, presents a clear opportunity to increase sales values, and drive repeat purchasing as shoppers look to replicate success. 22.9% of transactions containing fruit and vegetable plants also contain growing media, so displaying product specifically designed for specific grow-your-own crops such as grow bags is also an opportunity to support customer success with their grow-your-own projects whilst increasing transaction values.



Maximising link sales from grow-your-own shopping missions

Suggestion Two

Create a 'grow-your-own' zone in the plant area

There are very strong link-sales associations between fruit trees, herbs, and fruit & vegetable plants. For instance, 21% of transactions which contain fruit trees or bushes also contain vegetable and fruit plants, and 14% of transactions which contain vegetable and fruit plants also contain herbs. Indeed, the association between fruit trees and fruit and vegetable plants is far stronger than that between fruit trees and other trees. With this in mind, ensuring that zones including these plants are adjacent to each other is likely to support link-sales.

We'd further suggest that this zone be close to displays of bedding plants given the relationship between bedding and the grow-your-own category. The data suggests potential benefits in making sure that vegetable/salad/herb seeds and seed potatoes are displayed as consumers return indoors from this area of the plant area. 12% of vegetable/salad/herb seeds occur in transactions which also include a vegetable/fruit plant, with the figure for seed potatoes being 10%; the association between bedding plant and flower seeds is far less strong.



Maximising link sales from grow-your-own shopping missions

🔍 Suggestion Three

Anticipate and satisfy the need for pest control

The data shows that 3.3% of transactions of vegetable and fruit plants also contain items from the pesticide/fungicide category; that's over 40% more likely than for pack bedding (2.2%). This suggests shoppers purchase in the category with half an eye at least on protecting their crops from pests and diseases. In itself, this presents an opportunity for link sales, for instance by displaying these items and others associated with crop protection such as nets, close to or in any grow-your-own zone. However, it also presents an opportunity to cross-sell grow-your own plants, for instance by providing information on companion planting as a means of pest control at the point of sale and laying out or merchandising plants on the benches accordingly.



🔍 Suggestion Four

Cater to grow-your-own sales as a growing project

There are strong associations between sales of grow-your-own plants and plant support categories such as propagation, greenhouse accessories, plant support, plastic pots, and feeds. In the facing image the shopper enters the indoors from the plant area, sees the vegetable seeds, and is immediately led into displays of seed trays, propagation and plant care ranges. As well as ensuring that these ranges are easily 'happened upon' through store layout, there are promotional opportunities for retailers to educate consumers about the linked items which help ensure success with a grow-your-own project. This is likely to be especially pronounced in early season purchases in the grow-your-own category, with shoppers likely to be interested in raising young plants to maturity, transferring them through different containers, and protecting them from unseasonable weather.



Link-sales opportunities from grow-your-own

Supporting data and analysis

Over the course of a calendar year, herbs, vegetable/fruit plants, and fruit trees & bushes feature in 2.5%, 3.2% and 0.9% respectively of garden centres transactions as recorded in the Garden Retail Monitor; around one in twenty transactions over a year contains an element of these grow-your-own plants; clearly this will be higher during the peak gardening season. Indeed, plants in these categories are commonly purchased together: 21% of transactions which contain fruit trees or bushes also contain vegetable and fruit plants; 14% of transactions which contain vegetable and fruit plants also contain herbs; 17% of transactions which contain herbs also contain vegetable and fruit plants. This ‘edible’ dimension is particularly strong relative to other plant categories. For instance, just 0.7% of transactions which contain a fruit tree or bush also contain a (non-edible fruit) tree. This suggests a stronger likelihood of driving a linked sale(s) in the grow-your-own categories from sales of fruit trees and bushes as opposed to in the trees category. We should also note though, that there is also a strong association between the grow-your-own categories and bedding plants.

Plant categories associated with climbers	% of items in that category that are purchased in a transaction in which climbers are also present	Lift value
Pot bedding	22.4%	1.83
Pack bedding	16.6%	2.04
Herbs	13.6%	5.34
Fruit trees & bushes	5.9%	6.52
Alpines	4.3%	1.82
Climbers	2.2%	1.70
Trees	0.2%	0.93

The high lift factors between grow-your-own categories suggest a shopping mission associated with growing one’s own fruit and vegetables. The lesser (but still strong) association with sales of pot and pack bedding shows the opportunity to cross-sell between the categories, most likely driven by the common seasonality of sales in the categories, and the common planting situations (e.g. pots and containers being either re-planted or newly planted).

THEME THREE

As with bedding plants, there are strong associations between grow-your-own categories and containers and pots, but with a much lower association than for bedding with un-planted hanging baskets. In spite of the physical divide between outdoor plant areas and indoor displays of seeds, there is a very strong association between sales of vegetable and fruit plants and vegetable and fruit seeds; there is no such strong association between bedding plants and flowering seeds. This suggests that shoppers in the grow-your-own category are more likely to be invested in (and potentially more likely to be motivated by) the activity of nurturing GYO plants from the shopper than for bedding plants. This is further borne out by strong associations between grow-your-own plants and categories such as plant feeds, plant protection products, as well as growing media and containers.

Conversely, sales of vegetable and fruit plants appear to have a substantial influence on purchases in the following categories, suggesting opportunities to link sales. It is particularly striking that such significant proportions of packet seeds for edible plants and seed potatoes are associated with purchases of grow-your-own plants, in spite of the obvious physical division between the outdoor plant area and the indoor displays. We can note too the strong associations between categories associated with plant rearing and GYO categories.

Non-plant category	Percentage of vegetable and fruit plant transactions which also include that product category	Lift value
Growing media	22.9%	1.87
Vegetable/salad/herb seeds	11.1%	3.67
Feeds	8.2%	1.84
Flower seed	4.5%	2.06
Plant support	4.4%	2.00
Plastic pots	4.1%	1.42
Pesticides & fungicides	3.3%	1.77
Watering equipment	2.9%	1.42
Propagation	2.8%	2.68

Category	Percentage of that category's total purchases which occur in transactions where a purchase of vegetable/fruit plants is also present	Lift value
Vegetable/salad/herb seeds	12%	3.67
Seed potatoes	10%	3.09
Propagation	9%	2.68
Greenhouse accessories	8%	2.34
Plant support	6%	2.00
Growing media	6%	1.87
Feeds	6%	1.84
Plant care products	5%	1.63
Plastic pots	5%	1.42
Watering equipment	5%	1.42

Appendix

Market Basket Analysis



Market Basket Analysis

The analytical technique used to generate the tips in this guide is Market Basket Analysis. In a nutshell, this analysis examines the relationships between different items or categories of goods purchased in the same transactions in garden centres. Market Basket Analysis employs association rule mining to uncover relationships between products in retail transactions data. An association rule in this context represents a relationship between items that are purchased together, expressed in an "IF-THEN" format, such that:

IF {Item A} is purchased, THEN {Item B} is also purchased

Stepping back from garden retail sales to illustrate the idea of the analysis, we might look at relationships between purchases of bread and butter in a supermarket, and ask whether there is a relationship or rule at play: if bread is purchased, then is butter also purchased? Understanding whether or not such relationships between items or categories exist can help inform retailers' choices over store layout, merchandising and potential cross-promotion opportunities to drive sales of linked products. By displaying complementary products together or signposting to them, retailers can help increase transaction values and margins.

There are three key metrics to be familiar with in market basket analysis: Support, Confidence, and Lift. These metrics are used to assess the extent of any link-sales relationships in Market Basket Analysis.

Support

Refers to the proportion of all transactions that contain a given item or category. For instance, if a store had 100 overall transactions, and ten of these contained bread, then the 'support' for bread would be 0.1 ($10 \div 100 = 0.1$). The greater value is for support, the more frequently a given item or combination of items is purchased.

Confidence

Confidence expresses how many, among the transactions that contains bread, also contain butter. The bigger the overlap, the greater the confidence we have that people who are buying bread also buy butter. So, if among our ten transactions that contain bread, five also contain butter, confidence would be 0.5 ($5 \div 10 = 0.5$). Or in other words, 50% of the bread transactions also contain butter. In this guide we steer away from using the term 'confidence' and tend to provide a more detailed form of words for the sake of clarity.

Lift

Lift estimates how likely (or not) there is to be a dependent relationship between two items. We show values for lift throughout this report. In a nutshell, a lift value higher than 1.0 indicates that a link sale relationship exists, with the higher the value, the stronger the relationship.

Market Basket Analysis

To understand the concept of 'lift' in market basket analysis, it can help to work through the calculations and the logic behind them. In our example from the previous page, we might In our example, we might want to look at how likely it is that butter sales are to some extent driven by purchases of bread. The lift value is derived by calculating the support for bread and butter (e.g. the five transactions which contained both bread AND butter), and dividing that by the support for bread individually multiplied by the support for butter individually.

$$\frac{(\text{Support value for bread-and-butter})}{(\text{Support value for bread}) \times (\text{support value for butter})} = \text{lift value}$$

In short, we're looking at whether the probability of the items being purchased together in a transaction (top line of the equation) exceeds the probability of them being purchased separately and thus appearing in the same transaction purely by random chance. So far in our example, we have values for all but one parts of this formula: we have a support value for bread of 0.1 (ten transactions out of the hundred contain bread). We also have a support value for bread-and-butter of 0.05 (five transactions out of the hundred contain both bread and butter). But, so far, we haven't looked at the total number of the hundred transactions that have butter in them.

To illustrate the concept of lift, we'll look at two scenarios. Firstly, let's suppose that 90 of the 100 transactions contained butter; our five transactions which contain both bread and butter are quite a small proportion of the 90 transactions overall containing butter. In this case our lift value would be calculated as follows:

$$\frac{(0.05)}{(0.1) \times (0.9)} = 0.55 \text{ lift value}$$

Secondly, let's suppose that just 11 of the 100 transactions contained butter; now our five transactions which contain both bread and butter are a more substantial proportion of the 11 transactions overall containing butter. In this case our lift value would be calculated as follows:

$$\frac{(0.05)}{(0.1) \times (0.11)} = 4.545 \text{ lift value}$$

In short, the higher the lift value, the greater the probability of butter sales being dependent on, and driven by, and bread sales. When we look at the lift values in this guide, a value greater than 1.0 indicates that there is a dependent relationship, and the higher the value, the stronger the relationship. A value of less than one indicates no dependent relationship, and technically a value of zero would indicate that the items are mutually exclusive.

In reality, analysis such as this needs to be performed on far more than 100 transactions to be statistically robust. The data set used as the basis for this guide is around 7 million transactions for the full calendar year of 2023 among 71 garden centre outlets. These outlets are drawn from ten separate businesses to ensure that the data is not unduly influenced by the ranging and merchandising choices of a single retailer.

The data and methodology used to support this guide

The dataset used to produce the analysis in this guide was drawn from the HTA's Garden Retail Monitor (GRM), covering the full year of 2023. The dataset encompasses approximately 7 million transactions from 71 UK-based garden centres (across ten businesses), providing a robust sample for understanding customers' purchasing patterns across the industry.

Using descriptive Market Basket Analysis, we examined how frequently products from different categories in the GRM are purchased together and identified purchasing patterns that were statistically significant. The analysis revealed that over 60% of all customer transactions included items from two or more different product categories, highlighting the significant opportunity for linked sales in garden centres. The analysis we performed is based on 123 categories rather than tens or hundreds of thousands of individual items; this is to ensure that the analysis is as actionable and applicable by as many HTA members as possible, irrespective of whether or not they range a given item.

In total, we analysed over 15,000 relationships between different product categories. Each relationship was evaluated qualitatively to ensure the findings presented are both meaningful and practically useful for retailers.

Our analysis reveals clear patterns in how specific product categories that are commonly bought together. These kinds of insights can inspire fresh approaches to store layout and merchandise positioning, helping to make shopping more convenient for customers while potentially increasing link-sales opportunities. Indeed, many of the principles underlying this analysis are used in the online retail world, for instance being used alongside data on shoppers to suggest additional basket items. Whereas our analysis is based on aggregated data from many garden centres, market basket analysis can be (and most often is) performed at an individual business level; indeed, this would provide more specific insights relevant to that business. If the business also collects loyalty card or other shopper information, then this can be combined with market basket analysis to identify link-sales relationships for certain shopper types. For instance, it may be that there are stronger link sale relationships between plants and garden tools for younger gardeners just starting out in their new homes with a first-time garden, than for older pensioner gardeners who have accumulated the garden tools they need over a lifetime of gardening. Many garden centre epos suppliers are increasingly looking to ways to help their clients commercialise the data they hold on garden centre sales, and may be able to help with data mining within the business.

Further Information

We hope you have found this short guide useful. Significant work is ongoing across the industry to assure and drive up quality standards and certifications for growing media. Naturally this guide cannot provide the same level of quality assurance as this ongoing work, but nonetheless we hope it has provided a useful starting point for retailers looking to assure the quality of product they stock. Ranging high-quality growing media is a vital ingredient to ensuring that gardeners succeed with the plants and products they take home from retailers.

This is one of a series of guides and information available from the HTA and the Garden Centre Association (GCA) to help plant retailers get the most out of plant retailing; you can find other resources and materials as follows on hta.org.uk/plant-retail-success

RESOURCE	SUMMARY
Retailing peat-free growing media elearning	Five elearning courses have been produced with the GCA covering: what Peatlands are and why they're important; The Responsible Sourcing Scheme for growing media; helping shoppers choose the right growing media for the right purpose; reassuring peat users about peat-reduced and peat free alternatives; understanding main ingredients used as peat alternatives. The courses are designed for retail staff who work with shoppers in the plant area.
Information videos on caring for plants grown in peat-free	Videos produced by the GCA and RHS to help either retail staff or the general public succeed with plants grown in peat-free growing media
Guide for retailers: ranging quality growing media	A short written guide for retail buyers on how to work with manufacturers when ranging growing media products
Using Garden Plant Protection Products Safely elearning	A course jointly produced by the HTA and CropLife to provide retail staff with the knowledge needed to provide information to consumers, as is required by the Sustainable Use Directive.
Caring for plants grown in peat-free and peat-reduced mixes	This guide for staff in retail plant areas has been prepared with commercial growers, and shares tips and advice on ensuring plants grown in peat-free or peat-reduced mixes thrive and stay healthy and saleable.
Guide to maximising link sales from plants	This guide is based on real-life merchandising examples and statistical analysis of over 7 million garden centre transactions. It provides common-sense insights into ways of maximising profit and customer success from each transaction.
Shopper eye-tracking research	This research uses eye-tracking technology to see the plant area as the shopper sees it. It contains ten key insights, illustrated with video footage, which help improve merchandising effectiveness in the plant area, as other zones in the garden centre.