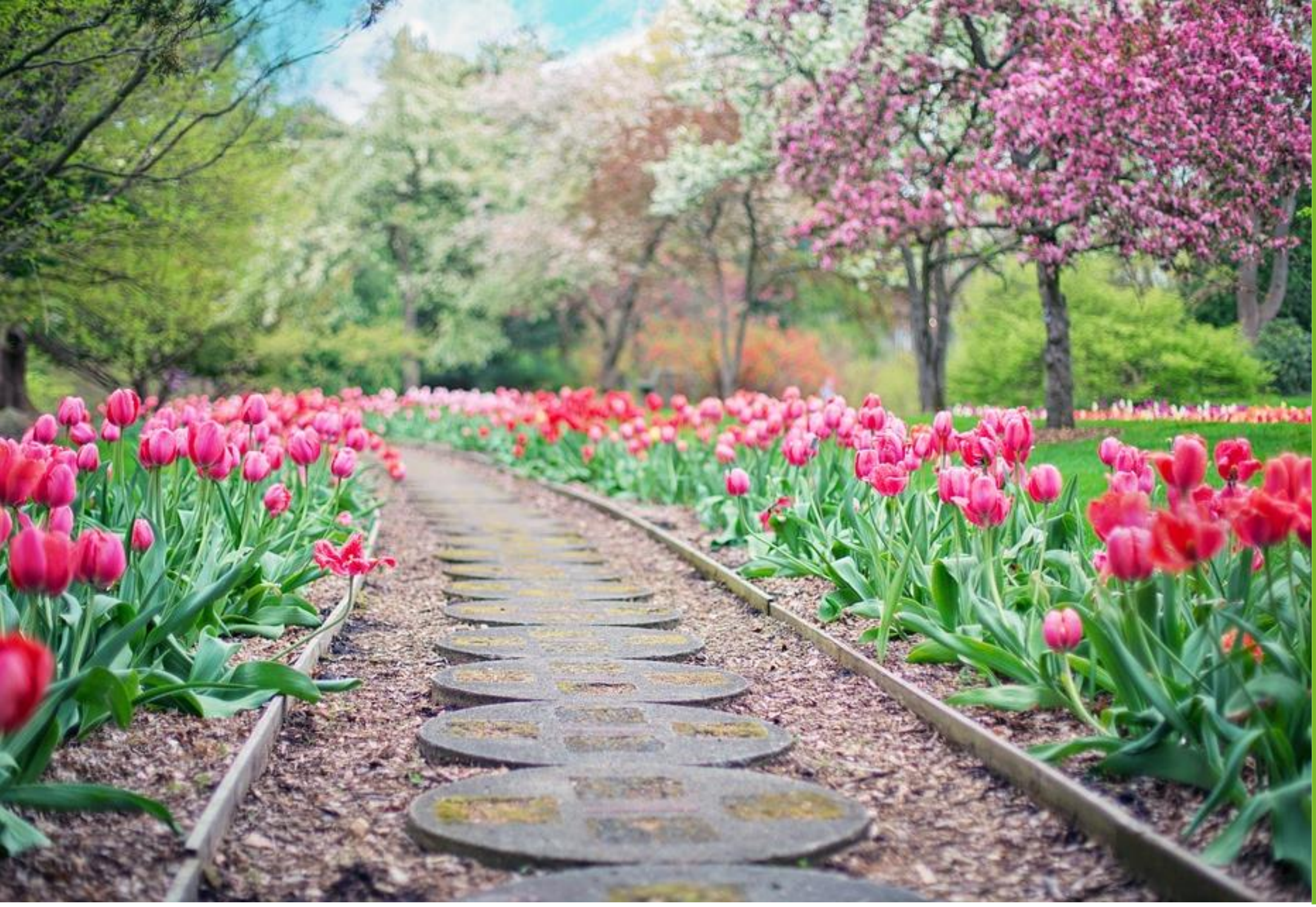

Garden market sizing

HTA MARKET UPDATE – INSIGHT EDITION

The Horticultural Trades Association

Overview – the size of ornamental horticulture industry

The Horticultural Trades Association

Ornamental horticulture and landscaping in the UK made an estimated **£24.2bn** contribution to national GDP in 2017, including direct, indirect and induced contributions

Around **568,700 jobs** were supported – equivalent to **1 in every 62 jobs**!

Proximity and access to green space and natural features adds an estimated **£131bn** to the value of UK houses

It's estimated, UK households spent almost **£6bn** on garden goods in 2017, excluding cut flowers

Spend on garden goods is equivalent to **£1 in every £100** of household spending

Meanwhile, UK households spent around **£2.4bn** on the professional garden maintenance and landscaping services in 2017

In this report we take a look at this spend over the last few years in more detail, breaking it down across categories, sales channels and demographics of those active in the market.

Source: Oxford Economics for HTA and the Ornamental Horticulture Roundtable Group (2018), *The economic impact of ornamental horticulture in the UK*

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Garden consumer segments

Consumer segmentation

HTA
The Horticultural Trades Association


A: Gardening Elders
14% of GB households
18% of garden retail spend

Well-off, retired or semi-retired elders with a keen interest in gardening and garden centre visiting.

£££££ Garden retail spend
5.3 Ave. visits to garden centres per year
Keenness on gardening

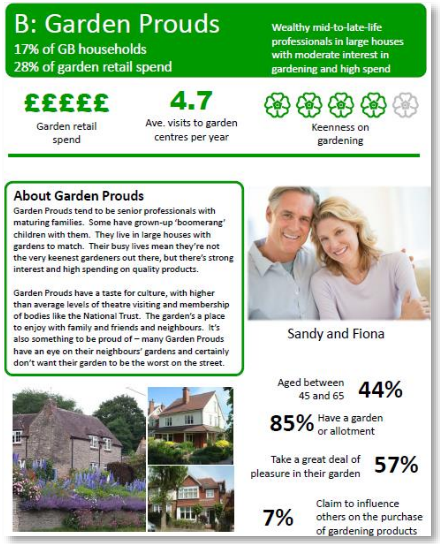
About Gardening Elders

Gardening elders love gardening. They're interested in plants and growing, and the garden is an outlet for creativity. Gardening provides enjoyable physical activity, fresh air, and the satisfaction of a beautiful home. For Gardening Elders their own satisfaction with the garden that counts – they're less motivated to 'Keep up with the Joneses' than others.

Gardening Elders are mainly retired and have lots of free time for hobbies and pursuits, and are well-off enough to pursue them all week long. The garden's usually got a lot in it, and is part of a medium or large house or bungalow. It's an outlet for creativity and a place to enjoy and share nature with grandchildren.

Cyril and Margaret

Aged over 65 73%
94% Have a garden or allotment
Take a great deal of pleasure in their garden 71%
7% Claim to influence others on the purchase of gardening products


B: Garden Prouds
17% of GB households
28% of garden retail spend

Wealthy mid-to-late-life professionals in large houses with moderate interest in gardening and high spend

£££££ Garden retail spend
4.7 Ave. visits to garden centres per year
Keenness on gardening

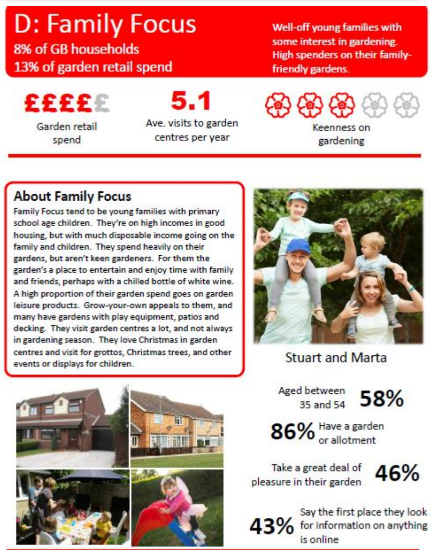
About Garden Prouds

Garden Prouds tend to be senior professionals with maturing families. Some have grown-up 'boomerang' children with them. They live in large houses with gardens to match. Their busy lives mean they're not the very keenest gardeners out there, but there's strong interest and high spending on quality products.

Garden Prouds have a taste for culture, with higher than average levels of theatre visiting and membership of bodies like the National Trust. The garden's a place to enjoy with family and friends and neighbours. It's also something to be proud of – many Garden Prouds have an eye on their neighbours' gardens and certainly don't want their garden to be the worst on the street.

Sandy and Fiona

Aged between 45 and 65 44%
85% Have a garden or allotment
Take a great deal of pleasure in their garden 57%
7% Claim to influence others on the purchase of gardening products


D: Family Focus
8% of GB households
13% of garden retail spend

Well-off young families with some interest in gardening. High spenders on their family-friendly gardens.

£££££ Garden retail spend
5.1 Ave. visits to garden centres per year
Keenness on gardening

About Family Focus

Family Focus tend to be young families with primary school age children. They're on high incomes in good housing, but with much disposable income going on the family and children. They spend heavily on their gardens, but aren't keen gardeners. For them the garden's a place to entertain and enjoy time with family and friends, perhaps with a chilled bottle of white wine. A high proportion of their garden spend goes on garden leisure products. Grow-your-own appeals to them, and many have gardens with play equipment, patios and decking. They visit garden centres a lot, and not always in gardening season. They love Christmas in garden centres and visit for grottos, Christmas trees, and other events or displays for children.

Stuart and Marta

Aged between 35 and 54 58%
86% Have a garden or allotment
Take a great deal of pleasure in their garden 46%
43% Say the first place they look for information on anything is online

These three groups account for:
- almost 2/3 of spend on UK gardens
- just under 40% of households

You can download the full reports on all nine segments from the HTA website: **click here**

Life stage, affluence and house type heavily influence the amount and mix of spending on gardens. The HTA has developed a consumer segmentation model which categorises the different wants, needs and spending levels of different consumers.

Gardening Elders account for a fifth of all garden retail spend. They tend to be retired, keen gardeners who tend to shop in garden centres and retail nurseries. A greater share of their garden spend than average goes on plants, reflecting their liking for gardening. They're also more likely than average to spend on garden maintenance services for age or health-related reasons.

Garden Proud account for just under a quarter of all garden retail spend. They tend to be wealthy professionals in large owner-occupied houses. They tend to be in their 50s, with children either in secondary school or leaving home. Their motivation to spend on their gardens is for gardening as a hobby, but also to maintain the status of their home in the neighbourhood and with friends.

Family Focus consumers tend to be home owning professionals with primary school age children. They account for around 11% of garden retail spend, with spend focused very much on entertaining and socialising and making the garden an attractive place to enjoy as a family.

Source: TGI survey, Kantar Media

HTA garden consumer segments in the market

Some consumer segments spend well over double per household the national average, meaning ranges and promotions can be targeted. We refer to the category level spend of these segments in the rest of the report.

Source: TGI survey, Kantar Media

Segment name	Segment description	% of GB households	% of garden retail spend	Average household garden retail spend
Gardening Elders	Well-off retired and semi-retired elders with a keen interest in gardening	14%	20%	£230
Garden Proud	Wealthy mid-to-late life professionals in large homes and moderate interest in gardening	15%	22%	£240
Convenience Gardeners	Mid-income professionals with busy lives and modest housing	11%	10%	£175
Family Focus	Well-off young families with some interest in gardening.	8%	11%	£245
Al Fresco Aspirations	Young, cosmopolitan wealthy professionals in good flats and rented housing.	7%	4%	£93
Backyard Barbecues	Mid-to-low income young families and couples in smaller houses	6%	6%	£160
Aging Ambivalents	Aging, low income households with modest spend on and interest in their small gardens	13%	14%	£138
Bare and Basics	Mid-life families with low incomes in basic, mainly rented housing in urban areas.	11%	8%	£125
What Garden?	Young renting couples and singles on low incomes in housing with very small or no garden	16%	6%	£52

*all households including zero spenders, spend figures exclude spend on garden buildings and totals may be higher given some categories may not be covered in the survey

Garden retail

Overall garden retail market value

The garden retail market has experienced steady growth over the last 8 years

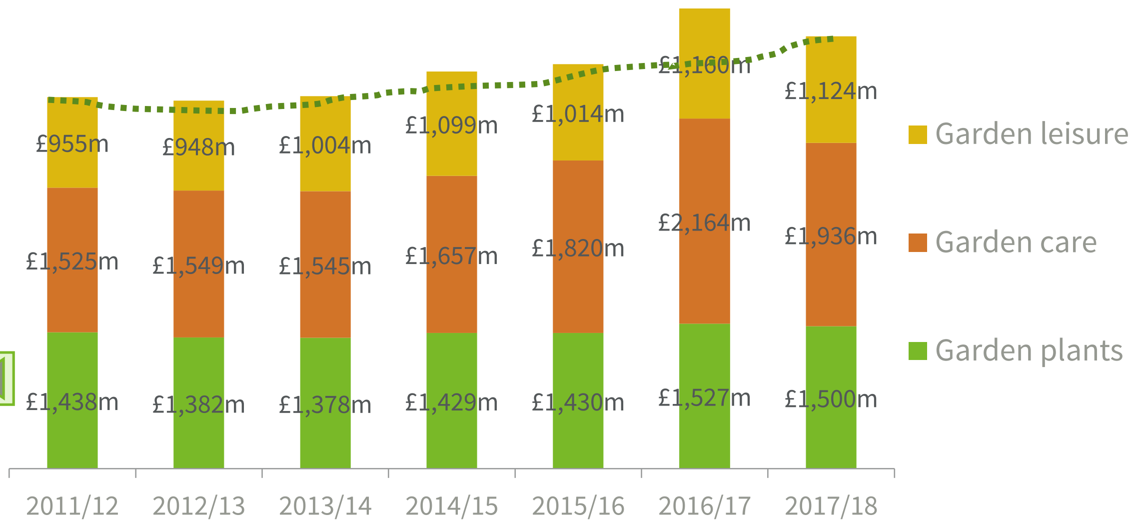


Figure 1. The value of consumer spending on garden retail products from 2011 to 2018.

Technical notes
This data comes from Kantar Media's TGI survey of 24,000 consumers, which asks respondents to estimate their spend on key garden categories across all sales channels. It does not cover all garden ranges, but HTA estimates the categories covered account for around 75-80% of spending on garden retail products and plants. Questions are asked through the year and relate to the respondent's spend in the last 12 months, so the data does not correspond to a defined calendar year. Consequently, although the HTA has selected data points to give a close reflection of the calendar year, this is imperfect and there may be some 'lag'. Figures are also subject to changes in sampling approach used by Kantar Media between 2012 and 2015. As the data is based on respondent recall of personal spend, the figures should be interpreted as inclusive of VAT. The spend figures are adjusted in line with inflation, so year on year comparisons can be made.

Each category includes:
Garden leisure – garden furniture, barbecues
Garden care – fertilisers & weedkillers, compost, lawn mowers, powered tools, non-powered tools
Garden plants – seeds/bulbs, bedding, other garden plants/trees

The graph's trendline shows that overall, the garden retail market has experienced steady growth in the last 8 years. The garden leisure and garden care categories have continued to grow throughout this period, meanwhile spend on garden plants has remained relatively flat. There was noticeable growth in spending in 2016/17, particularly within garden care categories – likely due to the development of lithium ion batteries making cordless tools more practical. This report will break the spend down by product categories and sales channels to provide a detailed overview of where the growth has come from.

Source: TGI survey, Kantar Media (2011-2018).

Garden plants, seeds and bulbs

Spend on seeds, bulbs, plants and trees has grown, with bedding plants remaining relatively flat

The Horticultural Trades Association

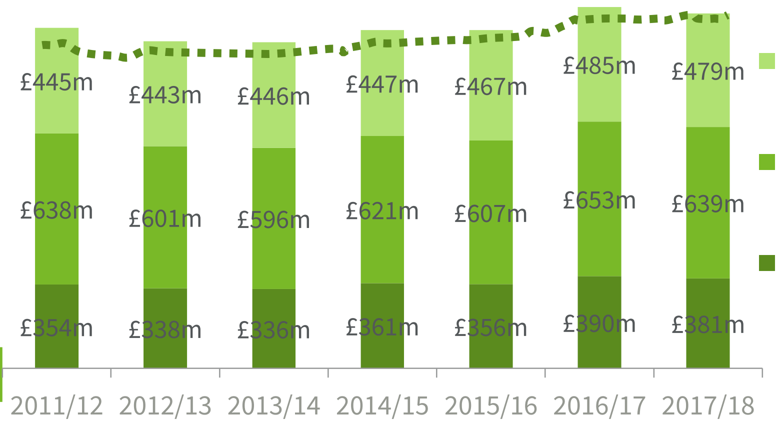


Figure 2. The value of consumer spending on garden plants, seeds and bulbs from 2011 to 2018.

Spend on bedding plants has remained stable, meanwhile spend on seeds, bulbs, plants and trees have shown steady growth. However, some caution should be applied to the bedding category estimate, as it is likely not all consumers have a clear or universal understanding of what bedding plants are. But trends are likely to be reliable though. Garden plant spending is highest among more affluent socio-economic groups at later life stages when interest in gardening as a hobby typically peaks.

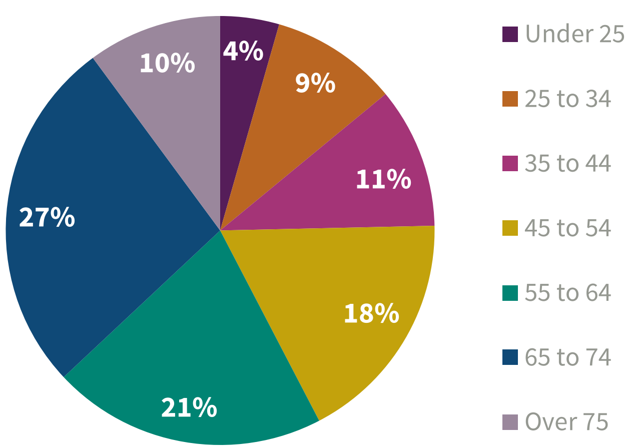


Figure 3. The proportion of spend on garden plant, seeds and bulbs accounted for by age group (2018).

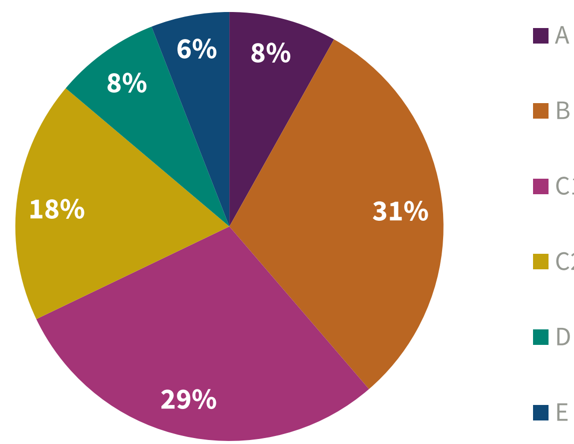


Figure 4. The proportion of spend on garden plants, seeds and bulbs accounted for by socio-economic group (2018).

Source: TGI survey, Kantar Media (2011-2018).

Garden plants

Consumer segment	% of garden plants, seeds & bulbs spend	Average household spend on garden plants, seeds & bulbs
Al fresco Aspirations	4%	£26
Gardening Proud	23%	£83
Convenience Gardening	10%	£58
Gardening Elders	24%	£90
Family Focus	9%	£69
Aging Ambivalents	14%	£46
Bare and Basics	7%	£34
Backyard Barbeques	5%	£43
What Garden?	6%	£16

Majority of spend on garden plants comes from more affluent retirees or mid-to-late life professionals with a keen interest in gardening. The Gardening Prouds and Gardening Elders spend almost double the average British household spend of £52 on garden plants, and account for just under half of all garden plant spend. The Family Focus consumer segment also spend considerably more than the average household despite accounting for a smaller percentage of garden plant spend; aiming to make their gardens a pleasant place to entertain and for the children to play.

*all households including zero spenders, houseplants are not included

Source: TGI survey, Kantar Media (2018).

Garden plants, seeds and bulbs

Garden centres have maintained their leading channel position

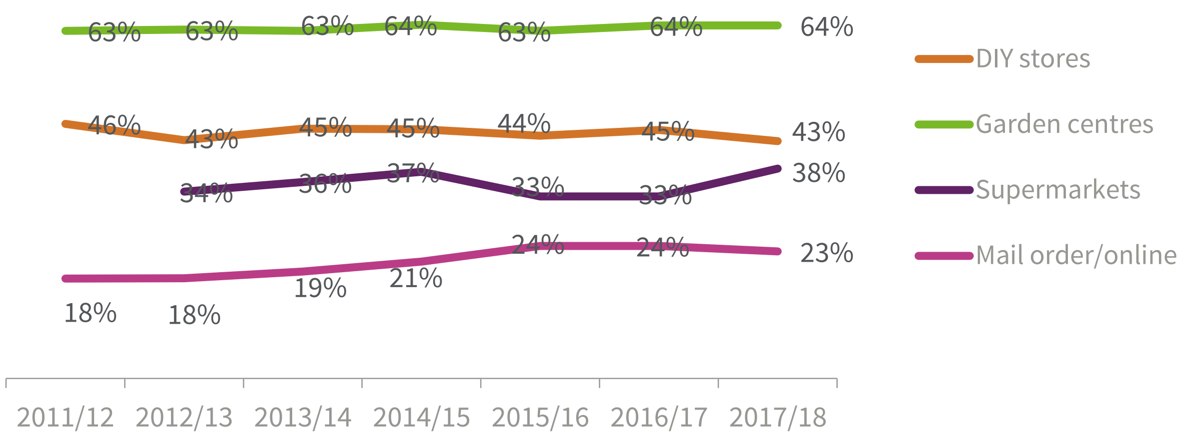


Figure 5. The proportion of people who have bought garden plants, seeds or bulbs who use each channel to purchase them (2018).

Garden centres have maintained their leading channel position in the garden plant, seeds and bulbs categories, whilst the online channel for plants has seemingly plateaued following it's rise back in 2015/16, with consumers still keen to buy their plants in physical stores. The DIY channel has suffered, faced with a core of consumers whose incomes are squeezed, gardens are declining in size and whose gardening purchasing habits are less established. On the contrary, supermarkets have grown their channel position. They're able to offer convenience and compete with lower prices whilst maintaining margin, appealing to consumers who are feeling the pinch on their pockets.

Source: TGI survey, Kantar Media (2011-2018).

Garden plants

Garden centres are the leading channel for purchasing amongst all ages and socio-economic groups

The Horticultural Trades Association

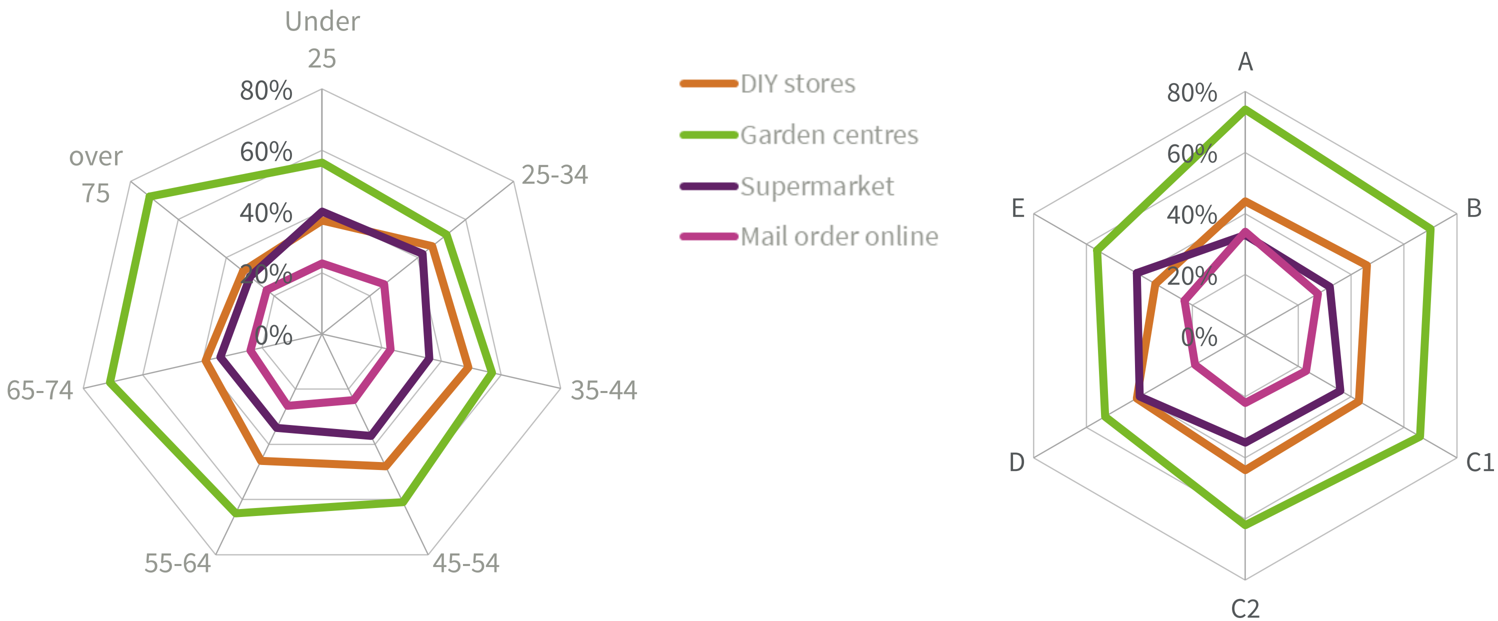


Figure 6. The proportion of consumers purchasing garden plants who purchase them in given channels by age and socio-economic group (2018).

Garden centres are the leading channel for purchasing garden plants amongst keen gardeners, young families and all age and socio-economic groups, but particularly for older and more affluent consumers. Meanwhile, DIY stores and supermarkets remain a competitive channel for younger consumers and lower socio-economic classes with less disposable income.

Source: TGI survey, Kantar Media (2011-2018).

Garden plants

Garden centres are the leading channel for purchasing amongst all ages and socio-economic groups

The Horticultural Trades Association

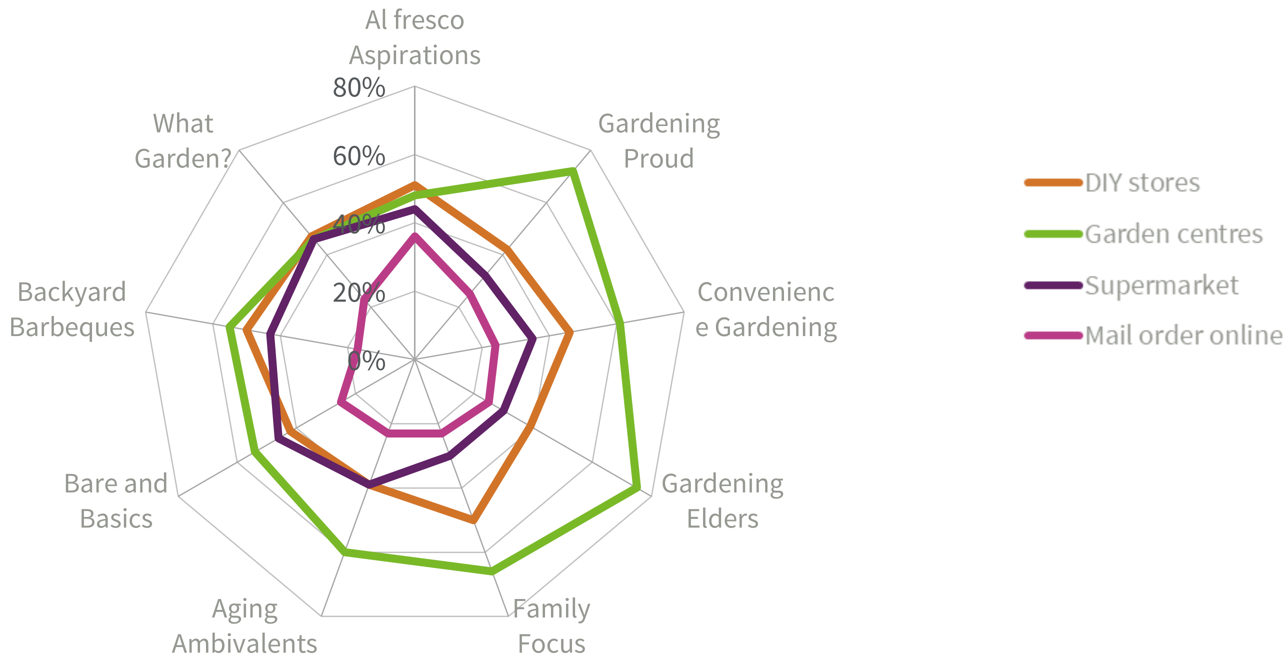


Figure 7. The proportion of consumers purchasing garden plants who purchase them in given channels by HTA garden consumer segment (2018).

Garden centres are the leading channel for purchasing garden plants amongst keen gardeners, young families and people with sizeable gardens. Meanwhile, DIY stores and supermarkets remain a competitive channel for households with smaller, paved over urban-type gardens, or those without a garden or much interest in gardening.

Source: TGI survey, Kantar Media (2011-2018).

Garden care

Spend has maintained steady growth, with technology helping to drive spend on tools

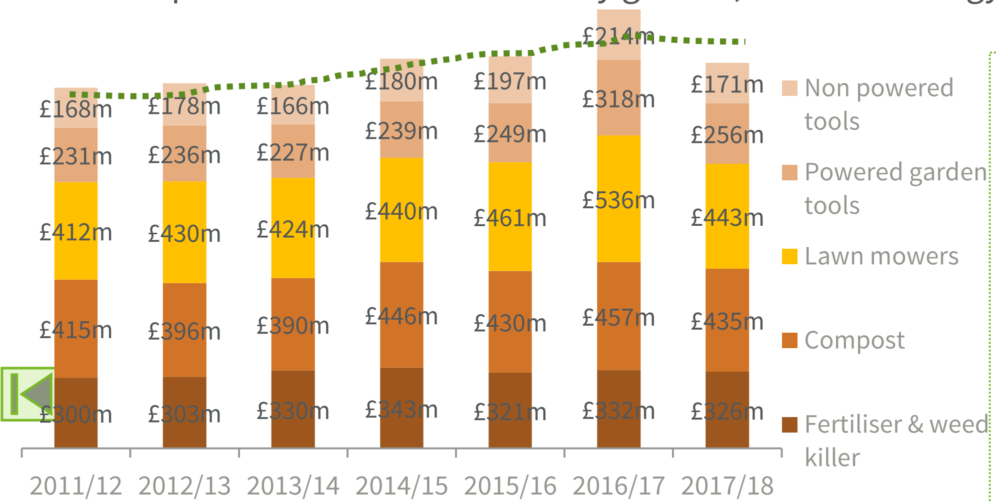


Figure 8. The value of consumer spending on garden care and maintenance products from 2011 to 2018.

Spend in garden care categories has sustained steady growth over the last 7 years. In 2016/17 we saw a sharp rise in garden care spend, particularly among the powered garden tools and lawn mower categories. This coincided with the widespread improvement and promotion of lithium-ion batteries, robotic and cordless technology, enabling cost-effective and enhanced versions of many tools. The bulk of spending in the garden care comes from older, more affluent consumers. Spend on powered and unpowered tools is highest amongst 65 to 75 year olds, with this age group showing big increases in spending in this category since 2015. This may be driven by greater leisure time to care for the garden; and a desire to take the physical strain out of gardening with manual tools.

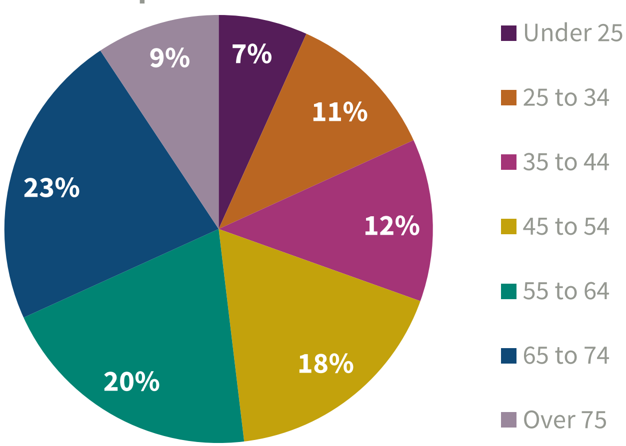
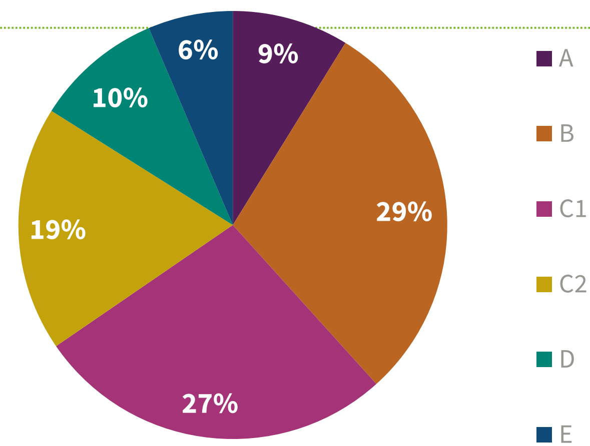


Figure 9. The proportion of spend on garden care and maintenance products accounted for by age group (2018).



Source: TGI survey, Kantar Media (2011-2018).

Figure 10. The proportion of spend on garden care and maintenance accounted for by socio-economic group (2018).

Garden care

The Horticultural Trades Association

Consumer segment	% of garden care spend	Average household garden care spend
Al fresco Aspirations	5%	£42
Gardening Proud	22%	£105
Convenience Gardening	9%	£67
Gardening Elders	20%	£98
Family Focus	9%	£93
Aging Ambivalents	15%	£63
Bare and Basics	8%	£53
Backyard Barbeques	6%	£67
What Garden?	6%	£22

Majority of spend on garden care products comes from older consumers regardless of their wealth, with an interest in gardening and perhaps more leisure time available. The Gardening Prouds and Gardening Elders spend significantly more than the average British household spend of £67 on garden care; meanwhile Aging Ambivalents with smaller gardens and less disposable income make up a sizable proportion of overall garden care spend. The Family Focus consumer segment also spend considerably more than the average household despite accounting for a smaller percentage of garden care spend; aiming to care for their gardens to maintain a pleasant place to entertain and for the children to play.

*all households including zero spenders

Source: TGI survey, Kantar Media (2018).

Garden care

Garden centres have maintained their leading channel position, whilst supermarkets are increasing their share

The Horticultural Trades Association

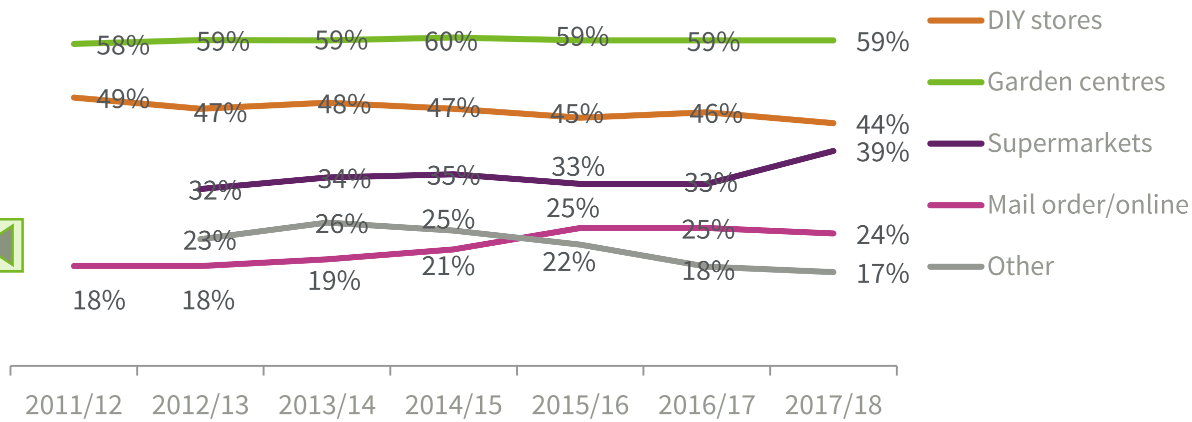


Figure 11. The proportion of people who have bought garden care or maintenance products who use each channel to purchase them (2018).

Garden centres have maintained their leading channel position in the garden care categories, whilst the DIY channel has suffered in this category too, likely driven by generational change in lifestyle and habits affecting their core of younger customers. Notably too, Focus DIY dropped out of the market in July 2011, likely leading to their share being absorbed by other channels. The online channel for garden care categories has showed steady growth over the last 7 years; driven by the convenience when making purchases with low emotional-involvement, like growing media for example, which is also heavy and difficult for the older demographics to transport. Similarly, supermarkets have shown massive growth in channel share in 2017/18, with German discount competitors Aldi and Lidl prompting UK supermarkets to expand their range of low price gardening and hardware.

Source: TGI survey, Kantar Media (2011-2018).

Garden care

Garden centres are the dominant channel amongst over 45's and more affluent consumers

The Horticultural Trades Association

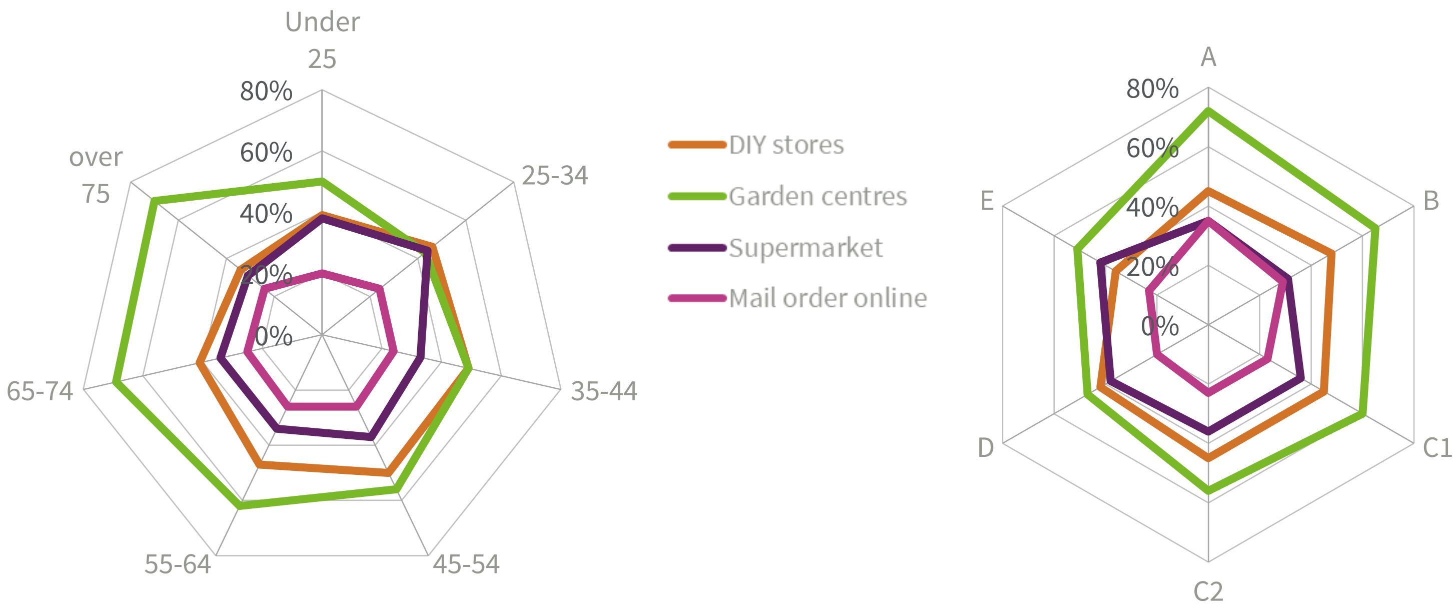


Figure 12. The proportion of consumers purchasing garden care or maintenance products who purchase them in given channels by age and socio-economic group (2018).

Garden centres tend to be the dominant channel for purchasing garden care and maintenance products amongst over 45's and more affluent consumers. But, garden centres are also the leading channel for under 25's to purchase their garden care and maintenance products. This could be due to younger consumers (and potentially novice gardeners) seeking more guidance before making their purchase and so heading to the store for advice and to browse for options. We also know that 20% of under 25's turn to their family and friends for garden information – most likely their parents, who may be keen garden centre visitors. Meanwhile, DIY stores and supermarkets remain a competitive channel for 25-44 year olds - possibly those with less disposable income and due to fewer 25-44 year olds owning their own homes. It is worth noting though that the DIY channel tends to dominate in terms of equipment, and the garden centre channel tends to dominate in terms of composts, fertilisers and weed killers.

Source: TGI survey, Kantar Media (2011-2018).

Garden care

Garden centres are the dominant channel amongst over 45's and more affluent consumers

The Horticultural Trades Association

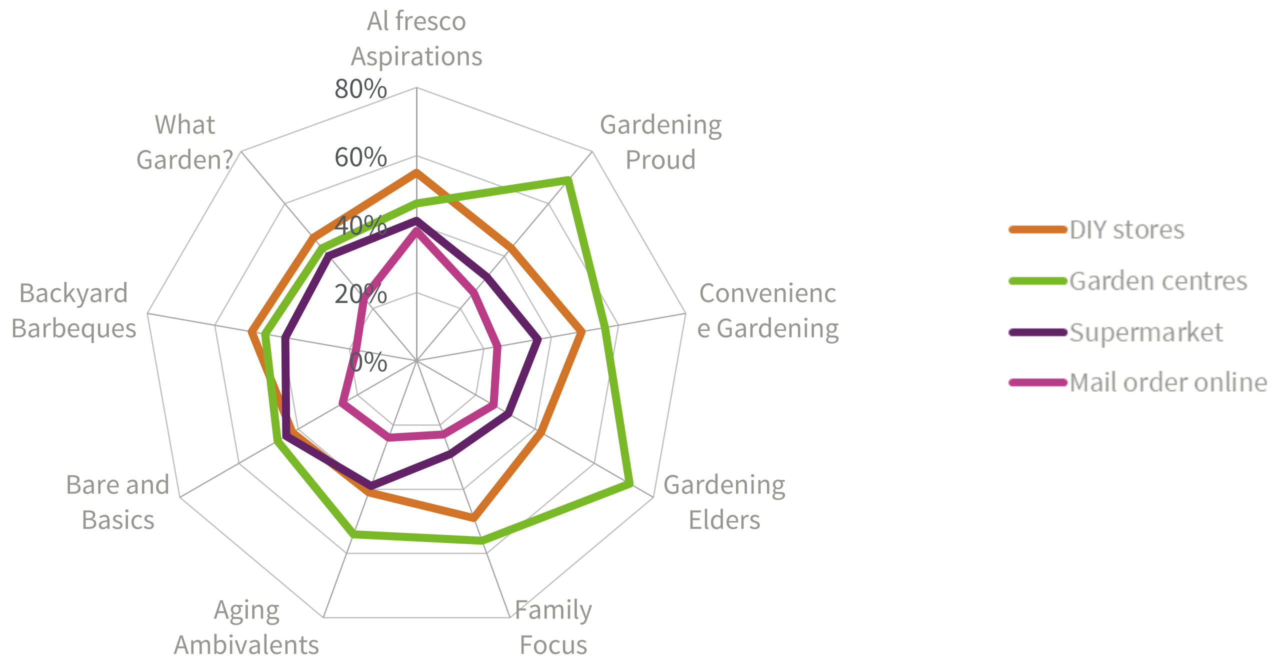


Figure 13. The proportion of consumers purchasing garden care or maintenance products who purchase them in given channels by HTA garden consumer segment (2018).

Garden centres tend to be the dominant channel for purchasing garden care and maintenance products amongst keener gardeners and families. This could be due to younger consumers (and potentially novice gardeners) seeking more guidance before making their purchase and so heading to the store for advice and to browse for options. Meanwhile, DIY stores and supermarkets remain a competitive channel for households with smaller or patio gardens - possibly those with less disposable income. It is worth noting though that the DIY channel tends to dominate in terms of equipment, and the garden centre channel tends to dominate in terms of composts, fertilisers and weed killers.

Source: TGI survey, Kantar Media (2011-2018).

Unplanted pots and containers

‘Portable’ garden assets are popular amongst those outside of the core gardening demographic

The Horticultural Trades Association

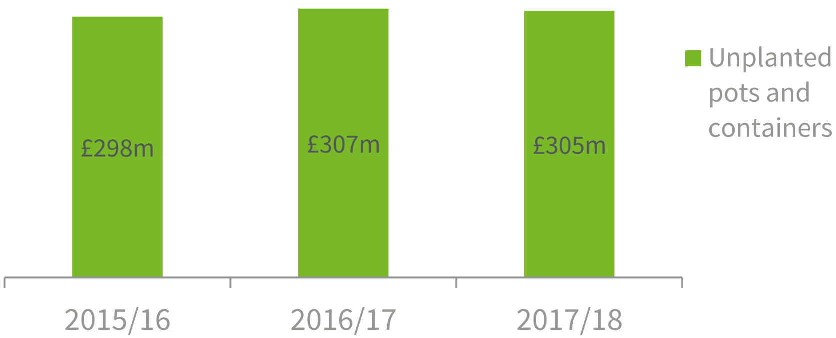


Figure 14. The value of spend on unplanted pots and containers from 2015 to 2018.

Spend on unplanted pots and containers in the last 3 years has remained relatively flat. This question was added in 2015 and covers all sizes and materials of pots, plus categories such as trugs, raised beds etc. Although as with any survey there will be some inconsistency as to what respondents ‘count’.

Consumers aged under 45 account for only 24% of total spend on garden plants, however they make up 32% spend on unplanted pots and containers. This may indicate they’re less likely to already own containers and/or that the rising rental market and shrinking gardens are driving willingness to invest in ‘portable’ garden assets.

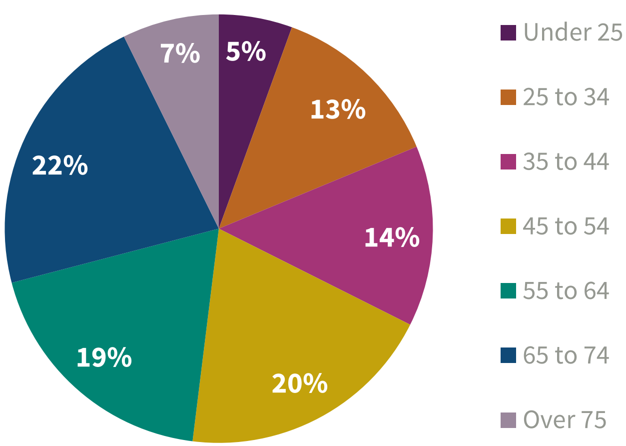
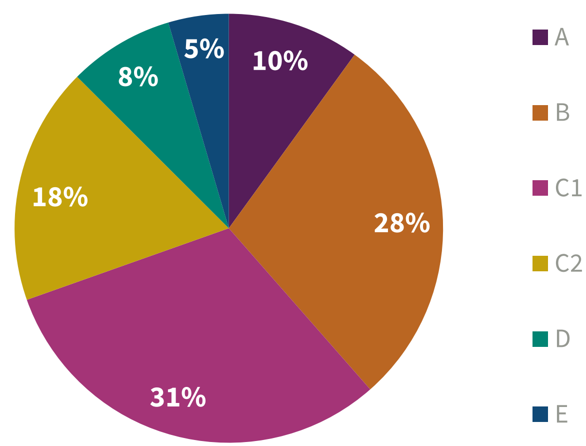


Figure 15. The proportion of spend on unplanted pots and containers accounted for by age group (2018).



Source: TGI survey, Kantar Media (2011-2018).

Figure 16. The proportion of spend on unplanted pots and containers accounted for by socio-economic group (2018).

Garden leisure market value

Spend has shown steady growth, with the home and garden a popular choice for entertaining

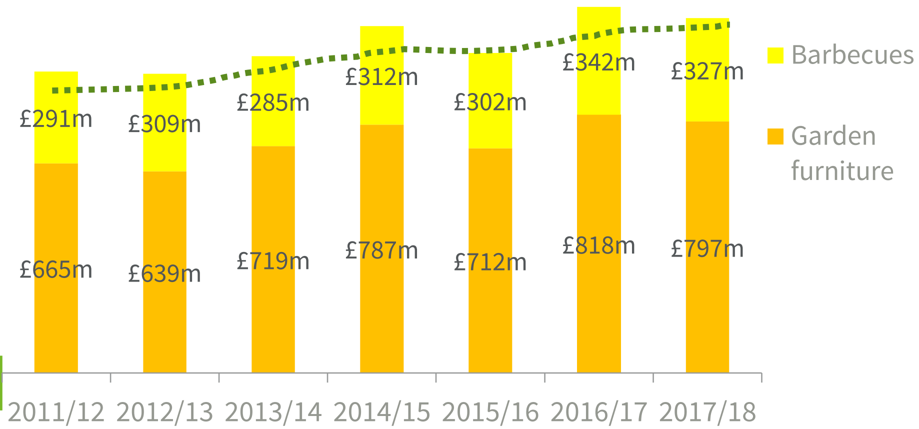


Figure 17. The value of consumer spending on garden leisure from 2011 to 2018.

Spend on garden leisure categories has maintained steady growth since 2011. Changes to the questionnaire are likely to be a major factor in the apparent decline of spend in 2015/16, with questions on containers, garden structures and landscaping added, possibly prompting respondents to record some spend in the furniture category.

As confidence in the economy has wavered and pressures on household income have grown, the garden has become a popular place to entertain as opposed to going out. 37% of British adults say they use their garden to entertain family or friends (e.g. garden parties, barbecues etc.). A run of long, hot summers have too helped spending on BBQ's and garden furniture; of which, under 45's make up a relatively greater proportion than other garden categories.

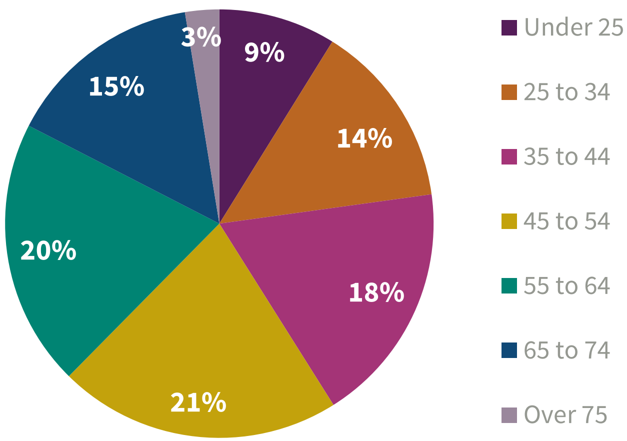
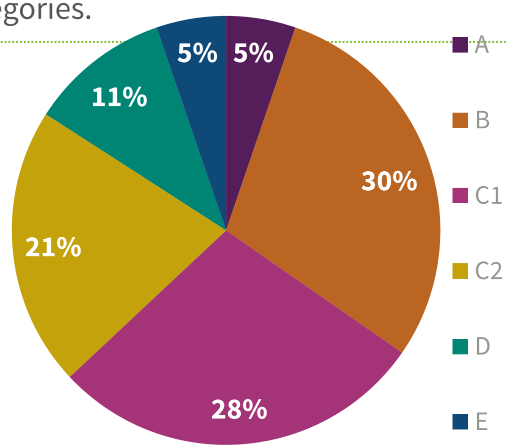


Figure 18. The proportion of spend on garden leisure accounted for by age group (2018).



Sources: TGI survey, Kantar Media (2011-2018), YouGov for HTA (2019).

Figure 19. The proportion of spend on garden leisure accounted for by socio-economic group (2018).

Garden leisure

Consumer segment	% of garden leisure spend	Average household garden leisure spend
Al fresco Aspirations	5%	£25
Gardening Proud	19%	£53
Convenience Gardening	11%	£50
Gardening Elders	15%	£42
Family Focus	15%	£83
Aging Ambivalents	11%	£28
Bare and Basics	10%	£38
Backyard Barbeques	8%	£50
What Garden?	6%	£13

*all households including zero spenders

Majority of spend on garden leisure products comes from older consumers with an interest in gardening, and young families. The Gardening Prouds, Gardening Elders, Convenience Gardeners and Aging Ambivalents make up the greatest proportion of overall spend on garden leisure products; suggesting interest in the garden is an important factor in decision to purchase. The Family Focus consumers spend almost three times more than the average British household spend of £39 on garden leisure; with the main use of their gardens being for leisure and recreational purposes. The Bare and Basics segment make up a greater proportion of spend on garden leisure, than they do for other garden categories; suggesting the garden is an appealing place to spend leisure time regardless of its size or household income. It could also be a more affordable alternative for many households, choosing to entertain at home rather than go out. The large differences in average household spend on garden leisure by segment though is likely to reflect the types of ranges they purchase. And arguably higher-end ranges last longer, meaning fewer first-time and repeat purchasers therefore the segment would make up a lower percentage of those active in the market.

Source: TGI survey, Kantar Media (2018).

Garden leisure

Garden centres are the leading channel whilst online plateaus and supermarkets grow their share

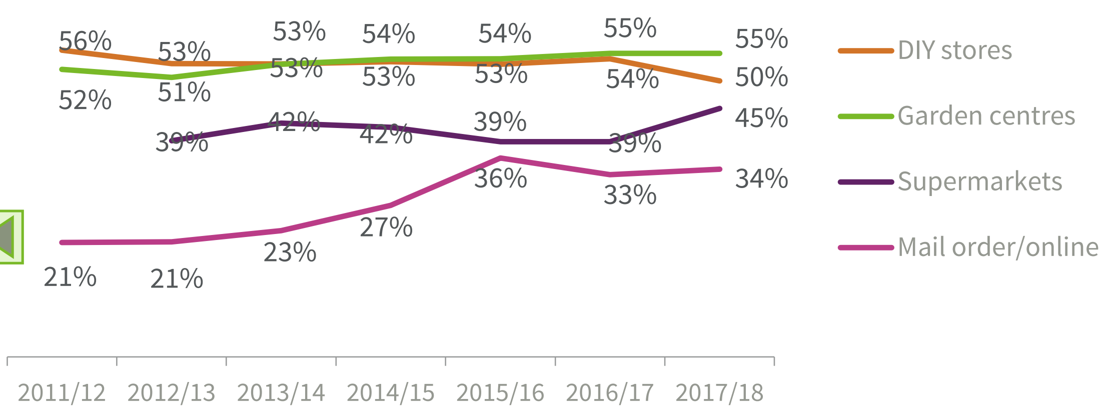


Figure 20. The proportion of people who have bought BBQ's or garden furniture who use each channel to purchase them (2018).

Garden centres hold the biggest channel share in spending on garden leisure goods. This is closely followed by DIY stores, where there has been a pattern of declining spend and channel share over the last few years, largely due to the big rise in supermarkets and online offers in the garden leisure market, driving competition for the younger, more cash-strapped consumers. Meanwhile, garden centres have been relatively unaffected, targeting higher-end ranges. Supermarkets and online retailers can often offer big discounts and lower price ranges, attractive to less affluent segments of the market and consumers whose confidence to make 'big ticket' purchases is relatively low. However since 2015, the proportion of spend for BBQ's and garden furniture made online has appeared to stall, suggesting a larger proportion of consumers prefer to see the product in a physical store before committing to the significant spend.

Source: TGI survey, Kantar Media (2011-2018).

Garden leisure

Competition between channels is closest among younger consumers who like to 'shop around' while garden centres lead with older more affluent consumers

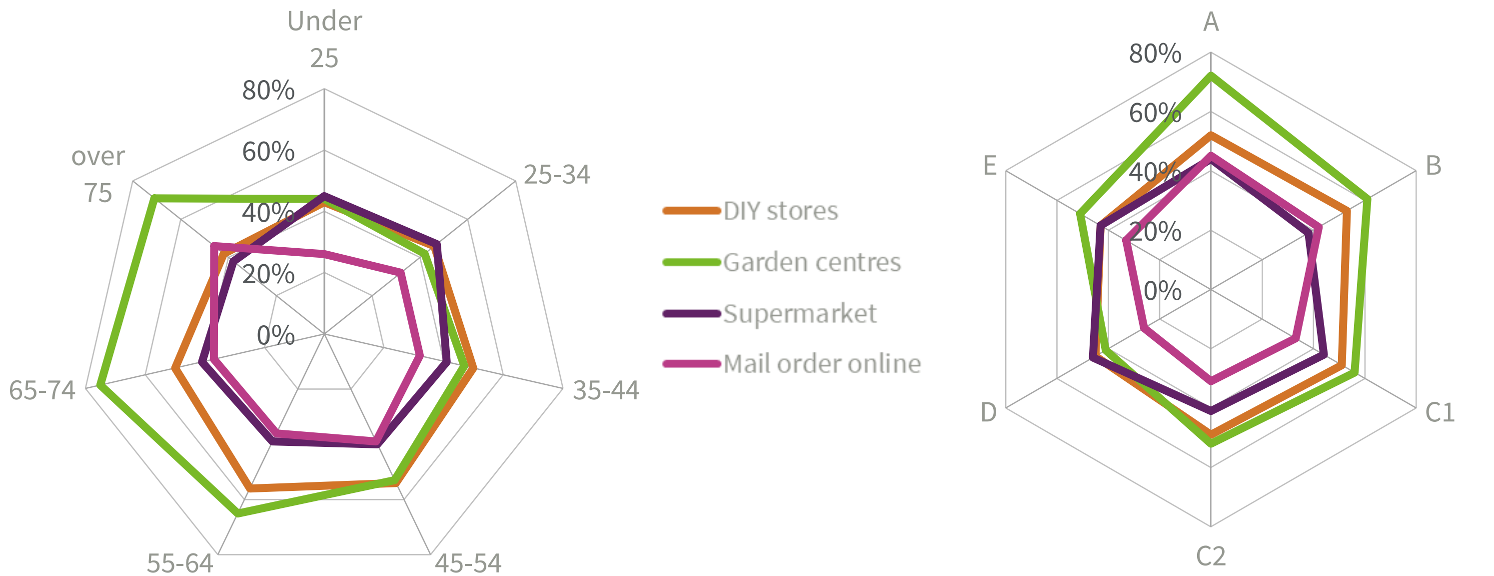


Figure 21. The proportion of consumers purchasing garden leisure ranges who purchase them in given channels by age and socio-economic group (2018).

Among less affluent and younger consumers, competition between the channels is the closest, suggesting these consumers tend to 'shop around' to get the best deals or make impulse and convenience purchases. Meanwhile garden centres have a leading position among over 55's, keen gardeners and more affluent consumers, suggesting the garden centre channel is important for more premium ranges. With under 55's, and households with smaller or patio gardens, the DIY and supermarket channels are extremely competitive with garden centres.

Source: TGI survey, Kantar Media (2011-2018).

Garden leisure

The garden centre channel leads for the keen gardener segments or larger garden spaces

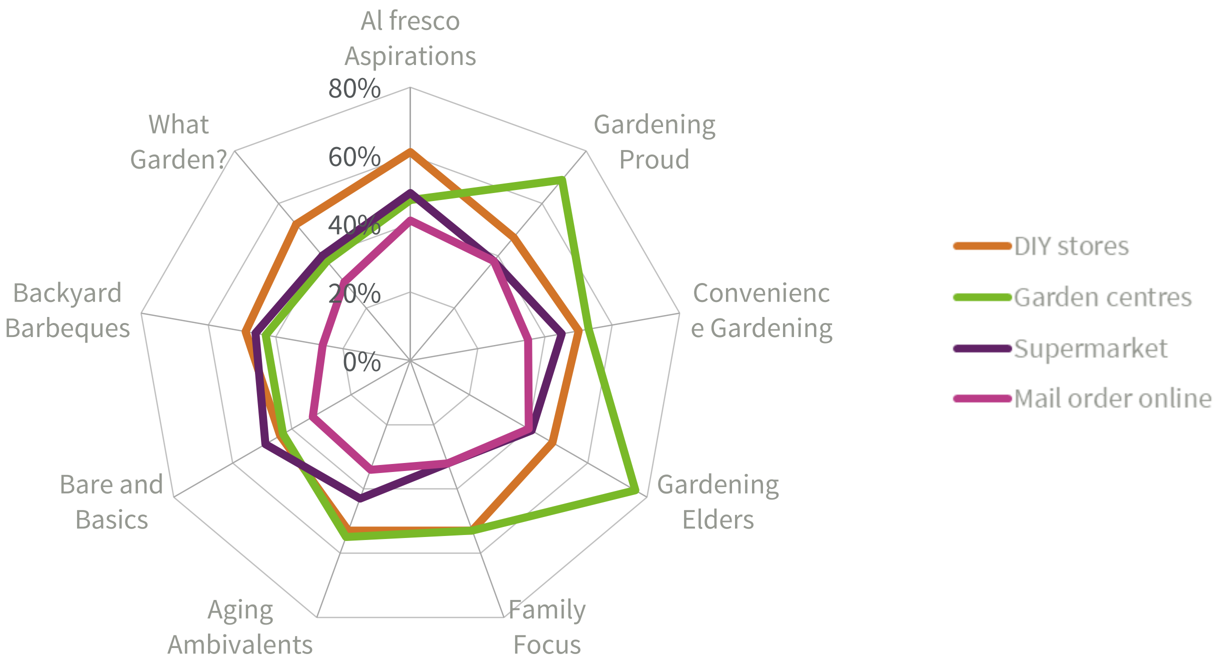


Figure 22. The proportion of consumers purchasing garden leisure ranges who purchase them in given channels by HTA garden consumer segment (2018).

The garden centre channel leads amongst keen gardener segments and families suggesting their purchasing is driven by high-end long-lasting ranges. Meanwhile consumers with smaller garden spaces, or paved gardens are making the greatest spend on garden leisure in DIY store and supermarket channels, where lower cost less-premium ranges are of greater appeal.

Source: TGI survey, Kantar Media (2011-2018).

The DIY channel

The Horticultural Trades Association

The percentage of customers who purchase something from all of the product categories listed in the table below via the DIY channel has decreased over the last 7 years. In particular, the proportion of lawn mowers, tools and BBQ's purchased in DIY stores has fallen significantly in this time period. Meanwhile, garden plant sales have remained relatively more stable.

Category	2011/12	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18
Seeds/bulbs	47%	45%	47%	47%	46%	46%	45%
Bedding	48%	45%	47%	47%	46%	47%	45%
Other garden plants/trees	52%	49%	48%	48%	48%	50%	47%
Fert/Weed	50%	48%	50%	49%	48%	49%	48%
Compost	51%	47%	49%	48%	47%	48%	46%
Garden Furniture	58%	55%	55%	55%	53%	54%	52%
Lawn mowers	61%	59%	60%	59%	58%	59%	54%
Powered garden tools	63%	63%	60%	62%	60%	59%	56%
Non powered tools	63%	58%	61%	62%	60%	58%	57%
Barbecues	57%	53%	53%	55%	56%	55%	51%
Unplanted pots and containers						51%	49%

Source: TGI survey, Kantar Media (2011-2018).

The garden centre channel

The garden centre channel for the purchasing of garden plants and plant care products has maintained its stable leading share since 2011. Meanwhile, garden centres have grown their share for the purchasing of BBQ's, power tools and lawn mowers.

Category	2011/12	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18
Seeds/bulbs	65%	65%	66%	67%	65%	67%	66%
Bedding	67%	67%	67%	68%	67%	68%	68%
Other garden plants/trees	71%	72%	71%	73%	70%	71%	71%
Fert/Weed	62%	63%	62%	63%	62%	63%	63%
Compost	66%	67%	66%	67%	67%	68%	67%
Garden Furniture	55%	55%	57%	58%	56%	59%	58%
Lawn mowers	48%	46%	47%	52%	51%	50%	51%
Powered garden tools	50%	54%	54%	62%	52%	56%	54%
Non powered tools	63%	62%	63%	65%	61%	63%	63%
Barbecues	47%	45%	48%	49%	50%	51%	49%
Unplanted pots and containers						68%	68%

Source: TGI survey, Kantar Media (2011-2018).

The supermarket channel

The Horticultural Trades Association

Supermarkets have continued to grow their presence for the purchasing of all of the key product categories in the table, over the last 7 years.

Category	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18
Seeds/bulbs	34%	36%	37%	35%	35%	37%
Bedding	32%	35%	35%	35%	35%	36%
Other garden plants/trees	33%	37%	37%	35%	35%	37%
Fert/Weed	34%	36%	36%	35%	35%	38%
Compost	34%	36%	37%	36%	36%	38%
Garden Furniture	36%	39%	40%	39%	38%	40%
Lawn mowers	31%	33%	35%	31%	31%	37%
Powered garden tools	34%	36%	36%	34%	35%	37%
Non powered tools	40%	41%	44%	42%	40%	44%
Barbecues	44%	48%	46%	41%	42%	47%
Unplanted pots and containers					38%	40%

Source: TGI survey, Kantar Media (2011-2018).

The mail order/online channel

The Horticultural Trades Association

Similarly to supermarkets, the mail order/online channel have grown their presence in the purchasing of all product categories – especially in tools and outdoor leisure. On the next page we look at which categories mail order channel is strong and likewise for the online channel.

Category	2011/12	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18
Seeds/bulbs	22%	22%	23%	25%	27%	28%	28%
Bedding	18%	19%	19%	21%	24%	24%	25%
Other garden plants/trees	23%	23%	25%	27%	29%	30%	31%
Fert/Weed	20%	19%	20%	23%	27%	26%	26%
Compost	20%	20%	21%	23%	26%	26%	27%
Garden Furniture	24%	23%	25%	31%	41%	36%	39%
Lawn mowers	21%	22%	24%	26%	33%	32%	35%
Powered garden tools	26%	28%	29%	33%	44%	39%	40%
Non powered tools	25%	27%	27%	33%	37%	37%	39%
Barbecues	19%	18%	21%	24%	29%	31%	30%
Unplanted pots and containers						28%	29%

Source: TGI survey, Kantar Media (2011-2018).

Mail order vs online (2018)

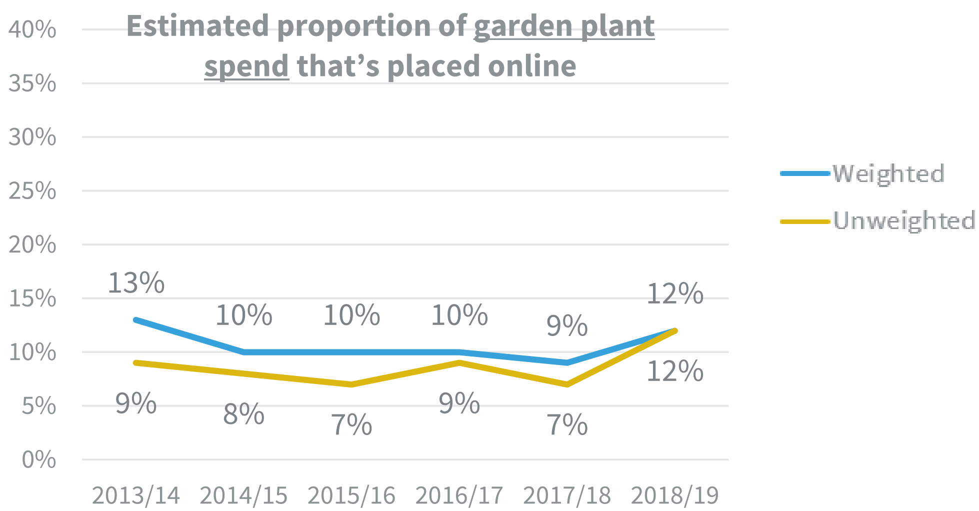
Category	Mail order: % of people active in the market for a category purchasing via mail order & their average household spend		Online: % of people active in the market for a category purchasing online & their average household spend	
Seeds/bulbs	12%	£66	19%	£63
Bedding	10%	£96	17%	£92
Other garden plants/trees	13%	£113	22%	£114
Fert/Weed	10%	£49	18%	£50
Compost	11%	£78	18%	£71
Garden Furniture	12%	£357	31%	£363
Lawn mowers	11%	£275	28%	£287
Powered garden tools	13%	£210	32%	£188
Non powered tools	13%	£104	30%	£107
Barbecues	9%	£259	24%	£288
Unplanted pots and containers	12%	£90	21%	£95

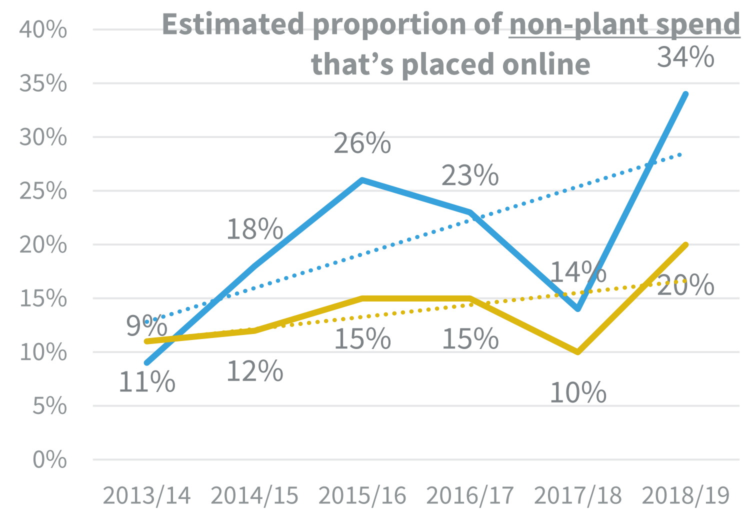
The Horticultural Trades Association

The online channel

The proportion of garden plant spend made online has remained relatively stable, meanwhile online spend on non-plant garden products is showing a long-term upward trend

HTA
The Horticultural Trades Association





The graphs above show how the proportion of garden plant and non-plant spend made online has changed over the last 6 years. The yellow lines refer to unweighted data, based on the volume of garden plants and non-plant products purchased online. The blue lines refer to weighted data which accounts for the value of the spend made online. It is important to consider the direction of long-term trend lines rather than the peaks and troughs between individual years where other factors like survey sampling or weather could have an impact. We can see that the proportion of garden plant spend made online has remained relatively stable since 2013/14. Conversely, the longer term trendline for non-plant products shows the proportion of spend made online is increasing significantly. For products with lower emotional-involvement, the convenience offered by online retailers is likely to appeal.

Source: Ipsos Mori and YouGov for HTA, bases c. 500-1300

The average household

The Horticultural Trades Association

When gardening, younger consumers are more likely to be influenced by family and friends, or take inspiration from online sources such as social media and garden centre websites. Meanwhile older consumers tend to go to the 'expert', watching gardening TV programmes and talking to staff or observing displays in garden centres or parks.

Where do consumers get ideas for their gardens?

Category	Under 45s	45-64s	Over 65s
Gardening TV programmes	13%	25%	31%
A family member	54%	31%	30%
A friend	29%	21%	25%
Staff/displays in garden centres	5%	9%	10%
Parks/public plant displays	7%	8%	11%
Gardening magazines	7%	5%	9%
Garden centre web sites	12%	10%	10%
Staff/displays in DIY stores	4%	6%	4%
Social networking sites	15%	4%	2%
Gardening radio	2%	6%	8%

Source: TGI survey, Kantar Media (2011-2018).

The average household

The HTA Horticultural Trades Association

The average UK household spends around £220 on their garden each year. This figure includes spend on garden products, wild bird care and garden buildings and structures, but excludes spend on the services of gardeners and garden landscapers.

Category	Average household spend per year (all households, incl. zero-spenders)	Average household spend per year (just those active in the market)
Total garden (incl. plants, plant care, garden leisure, garden care, wild bird feed, greenhouses and sheds; excl. garden services, caged bird feed and conservatories)	£192	£1,131
Total garden services (garden landscaping and maintenance)	£84	£2,334

Average household spend on garden buildings (active spenders)
Greenhouses - £338
Garden sheds – £431

Average household spend on garden services (active spenders)
Landscaping - £2,073
Maintenance - £261

Source: TGI survey, Kantar Media (2011-2018).

Average household spend on garden by age (incl. zero-spenders)

The Horticultural

Average spend on gardening categories (plants, growing media, plant care etc.) continues to rise with age, peaking aged 55-74, before declining amongst those aged 75+ when some gardening might become too strenuous. Whilst for average spend on BBQ's, the pattern almost reverses, declining with age post 44 years old. Average spend on non-powered tools remains relatively consistent across all age groups. There is a peak in spend on powered tools amongst over 55's, where perhaps physical strength begins to decline, whilst there is a drop off in spending amongst over 75's who are likely to then pay a professional or get help elsewhere.

Category	< 25	25 - 34	35 - 44	45-54	55-64	65-74	Over 75
Seeds/bulbs	£6	£8	£10	£14	£18	**£19**	£16
Bedding	£8	£13	£14	£23	£28	£35	£31
Other garden plants/trees	£6	£10	£13	£20	£25	£22	£15
Fert/Weed	£6	£7	£8	£12	£13	£16	£16
Compost	£7	£9	£11	£16	£18	**£23**	£21
Garden Furniture	£19	£24	£27	£33	£36	£29	£17
Lawn mowers	£12	£12	£13	£17	£22	£16	£14
Powered garden tools	£6	£7	£8	£9	**£13**	**£10**	**£7**
Non powered tools	£4	£5	£5	£6	£10	£5	£6
Barbecues	£10	£13	**£16**	£13	£12	£9	£2

Source: TGI survey, Kantar Media (2011-2018).

Greenhouses & sheds

Greenhouses & sheds - market value

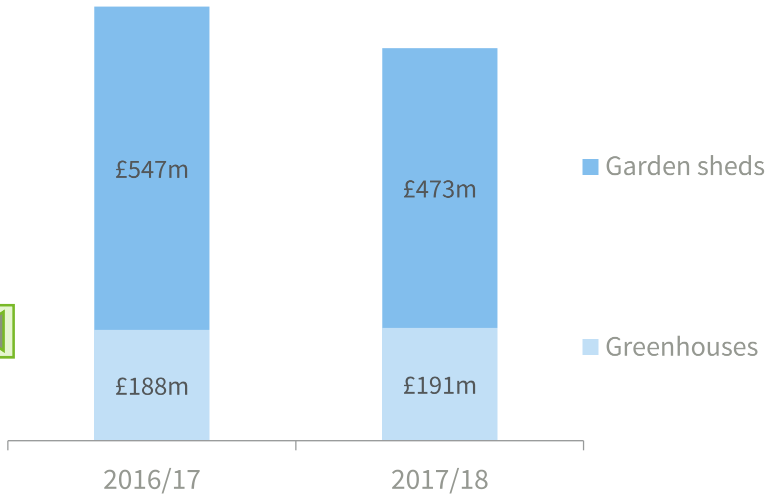


Figure 20. The value of consumer spending on greenhouses and sheds from 2016 to 2018.

Consumer spending on greenhouses grew whilst spend on garden sheds declined, from 2016 to 2018. A few more years worth of data for these categories will more accurately represent any trends in consumer spending. But there could be lots of factors effecting the apparent drop in spending on garden sheds. Gardens are getting smaller, and with garden sheds there tends to be a regeneration lifecycle of around 10 years – meaning consumers tend to look for a new shed after this time. The warm summer of 2016 could have shifted this spend forward, with consumers spending more time in the garden. There is also likely to be some statistical variation year on year in the way the question is asked, so we will continue to track any trends going forward. But overall, consumer spending on greenhouses is around £200million annually, whilst for garden sheds it's around £1/2billion.

Sources: TGI survey, Kantar Media (2011-2018), YouGov for HTA (2019).

Greenhouses

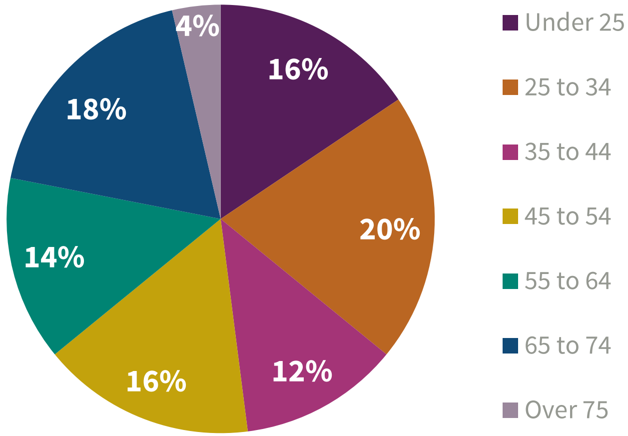


Figure 21. The proportion of spend on greenhouses accounted for by age group (2018).

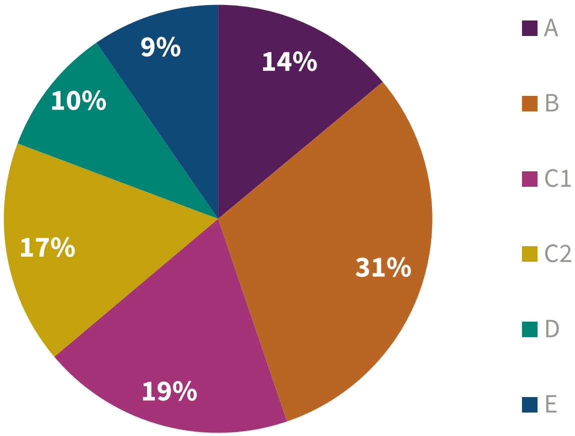


Figure 22. The proportion of spend on greenhouses accounted for by socio-economic group (2018).

Spending on greenhouses is mainly from more affluent consumers and is relatively consistent across every age group, with 25 to 34 year olds and 65 to 74 year olds making up the greatest proportion of spend. For the younger of the two age groups, this was a pattern we observed from the 2017 data too and there could be a number of factors driving greater spend from this age group. We know the desire to eat healthier, locally-produced foods is at an all-time high; meanwhile younger consumers' lesser spend on plants suggests greenhouses may be used for alternative purposes – such as an al fresco living or entertaining space. The majority of spend comes from consumers with a keen interest in gardening, as well as older age groups who are likely to have more disposable income and leisure time.

Source: TGI survey, Kantar Media (2016-2018).

Garden sheds

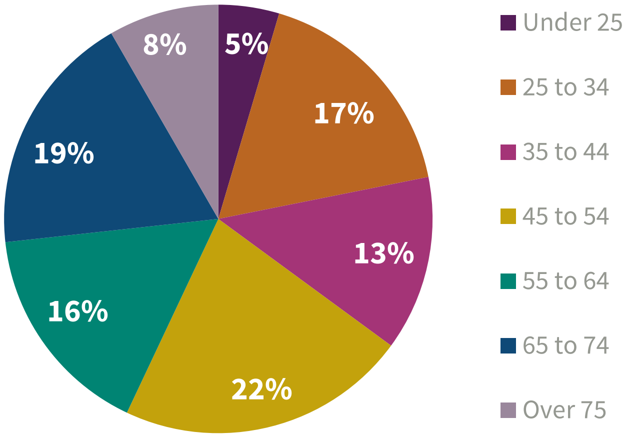


Figure 21. The proportion of spend on garden sheds accounted for by age group (2018).

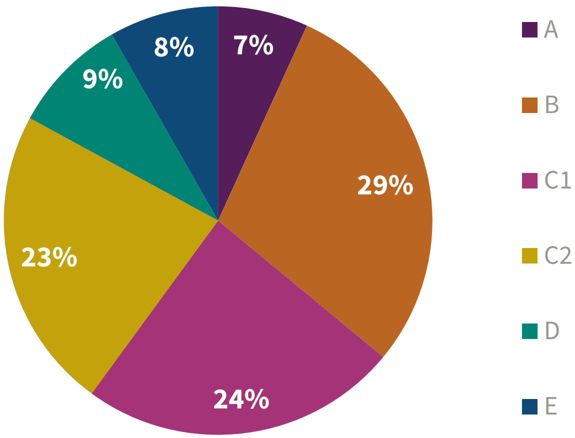


Figure 22. The proportion of spend on garden sheds accounted for by socio-economic group (2018).

Spending on garden sheds comes from all age groups largely between 25 to 74 years old and mainly from middle to working class socio-economic groups. These are likely to be homeowners with gardens big enough for a shed, meanwhile uses for the sheds are likely to differ. The greatest value of spending on garden sheds comes from the Gardening Elders and Gardening Proud segments (20% and 15% respectively) who have disposable leisure time and a keen interest in gardening. This is followed by the Family Focus group (14%) who are likely to use a shed to store play equipment, leisure accessories or lawnmower etc. You can find out more about the nine consumer segments shortly.

Source: TGI survey, Kantar Media (2016-2018).

Greenhouses & garden sheds

The Horticultural Trades Association

Consumer segment	% of greenhouse spend	% of garden shed spend
Al fresco Aspirations	12%	6%
Gardening Proud	21%	18%
Convenience Gardening	6%	11%
Gardening Elders	17%	11%
Family Focus	7%	11%
Aging Ambivalents	13%	12%
Bare and Basics	9%	12%
Backyard Barbeques	4%	11%
What Garden?	10%	7%

The greatest proportion of spend on greenhouses comes from the older consumer groups keen on gardening. On the contrary, spend on garden sheds is much more evenly distributed across all of the garden consumer segments; who may be likely to purchase their sheds for different uses.

Source: TGI survey, Kantar Media (2018).

Garden services

Garden services market value

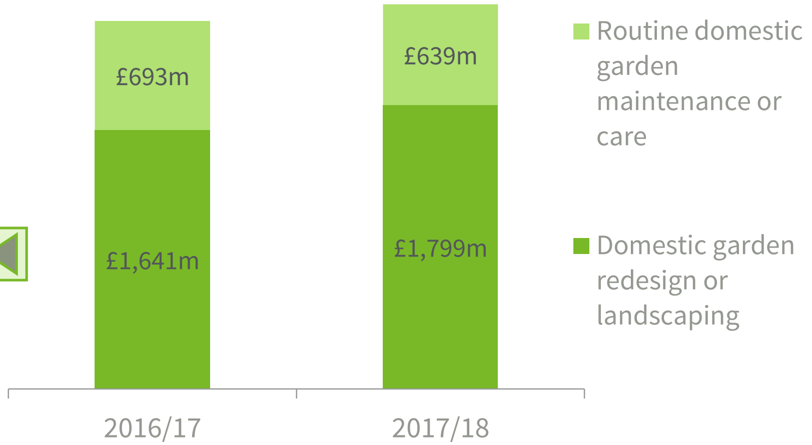


Figure 20. The value of consumer spending on garden services from 2016 to 2018.

Consumer spending on landscaping services increased from 2016 to 2018, meanwhile spend on maintenance decreased. When a further year of data is collected next year, any trends can be interpreted more robustly. But, greater pressure on household incomes could mean consumers are looking to carry out smaller maintenance projects themselves where possible. The following pages look into how this spending breaks down by households, age and socio-economic groups.

Source: TGI survey, Kantar Media (2016-2018).

Garden landscaping & redesign

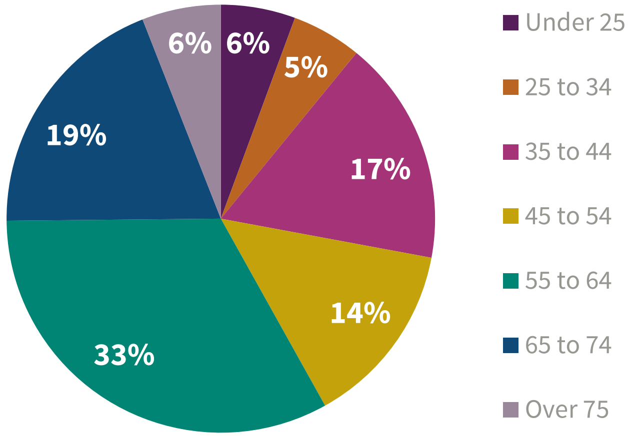


Figure 21. The proportion of spend on garden landscaping accounted for by age group (2018).

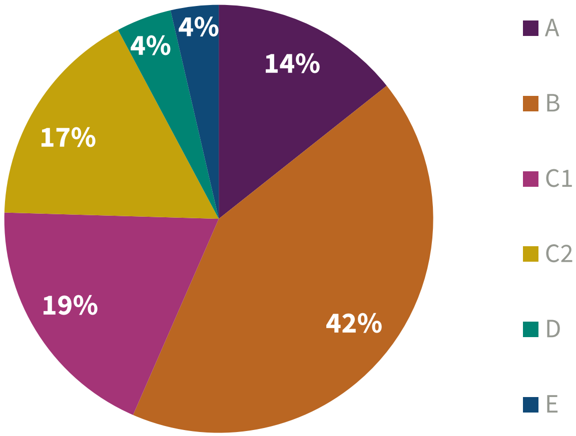


Figure 22. The proportion of spend on garden landscaping accounted for by socio-economic group (2018).

The greatest proportion of spend on garden landscaping comes from 55 to 64 year olds and more affluent socio-economic groups. These age groups are likely to be the people who have reached the peak of their working careers, whose children have moved out and whom have the most disposable income. Similarly, one-fifth of spend comes from over 65's, who are perhaps less capable of doing major projects in their garden.

Source: TGI survey, Kantar Media (2016-2018).

Garden landscaping & redesign

Average household spend	< 25	25 - 34	35 - 44	45-54	55-64	65-74	Over 75
Those active in the market	£1594	£665	£1938	£2709	£4233	£1888	£1231
All households (including zero-spenders)	£31	£21	£70	£54	£136	£65	£44

Average household spend	A	B	C1	C2	D	E
Those active in the market	£2850	£3289	£1720	£1838	£800	£721
All households (including zero-spenders)	£212	£122	£41	£54	£18	£20

Average household spend on landscaping generally increases with age before peaking and declining around 65 years old. Average spend also tends to increase with affluence and socio-economic group. Where average spend amongst all households is highest (i.e. 55-64 year olds, 'A' socio-economic group), this reflects the greater proportion of the market that these groups make up. The high average spend amongst under 25's who are active in the market, compared to the average for all under 25 households; suggests that there could be a small segment of very high spending young professionals. This tallies with the relative high spend of the 'Al Fresco Aspirations' segment on greenhouses.

Source: TGI survey, Kantar Media (2016-2018).

Garden routine maintenance & care

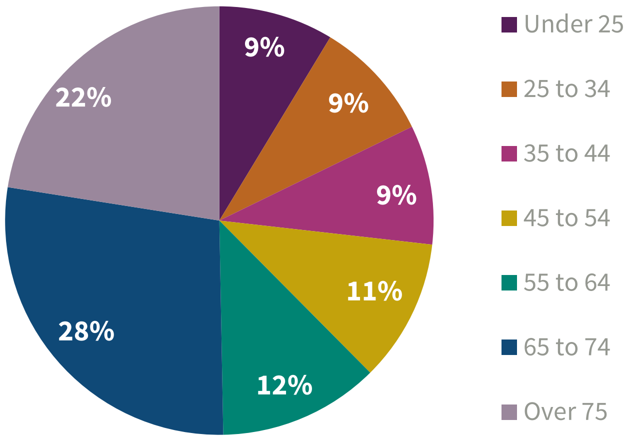


Figure 23. The proportion of spend on garden maintenance accounted for by age group (2018).

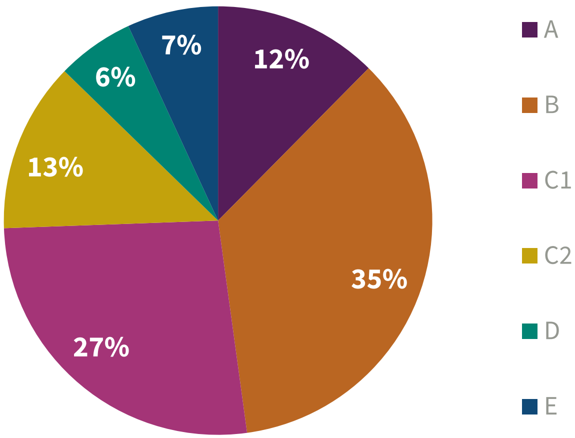


Figure 24. The proportion of spend on garden maintenance accounted for by socio-economic group (2018).

The greatest proportion of spend on garden maintenance services comes from more affluent groups and over 65's. These people are likely to no longer be able to carry out physical work in their gardens, but are comfortable financially to pay for maintenance services, rather than ask for help from family or friends. With the UK population aging, this spend and the need driving it is likely to grow. They're also more likely to be retired and so have more leisure time to enjoy a well kept garden.

Source: TGI survey, Kantar Media (2016-2018).

Garden routine maintenance & care

Average household spend	< 25	25 - 34	35 - 44	45-54	55-64	65-74	Over 75
Those active in the market	£436	£270	£229	£234	£227	**£255**	**£277**
All households (including zero-spenders)	£17	£13	£13	£15	£18	**£34**	**£59**

Average household spend	A	B	C1	C2	D	E
Those active in the market	**£469**	£323	£250	£225	£148	£157
All households (including zero-spenders)	**£65**	£36	£20	£15	£9	£13

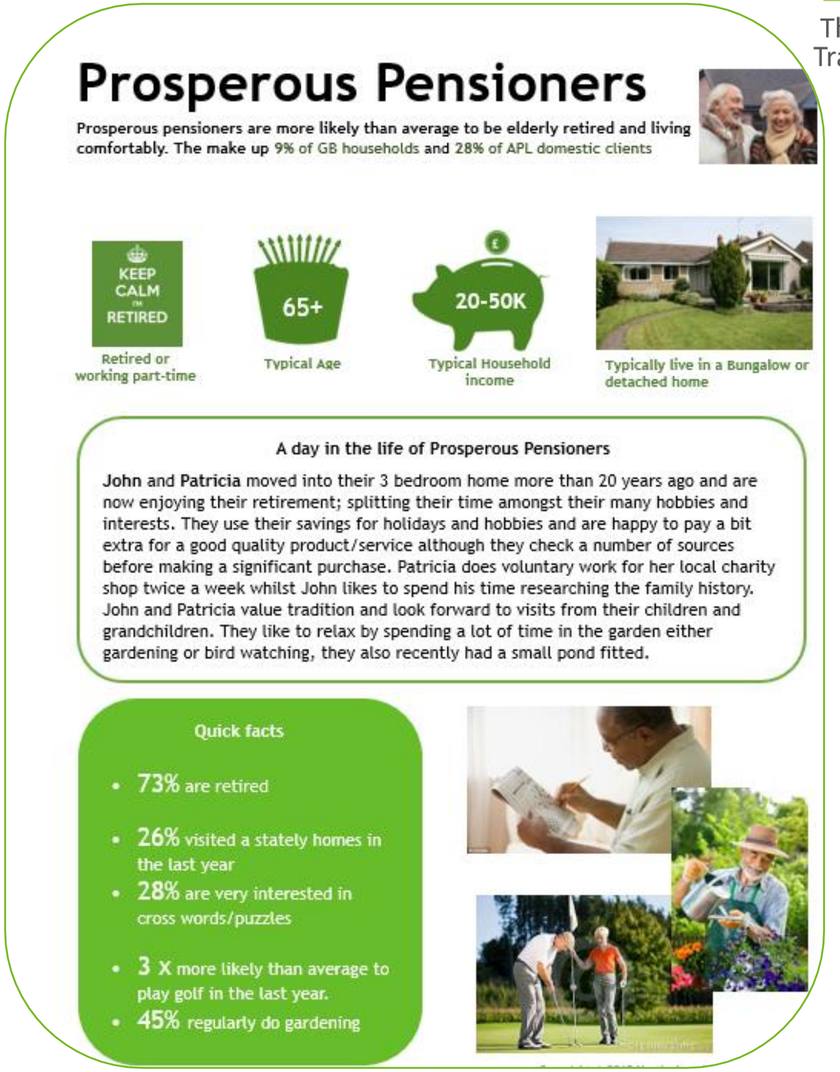
Average spend amongst households active in the market, is highest amongst under 35's and more affluent socio-economic groups. This core of younger consumers are perhaps less likely to have the gardening 'know-how' to carry out the works themselves or to be first-time home owners looking to tidy up a new garden. They may also have less disposable leisure time due to starting out careers and working life, and so choose to pay a professional instead. There is also likely to be fewer home-owning under 25's than other age groups, therefore a less reliable and representative sample. Average spend amongst households active in the market remains relatively flat across older age groups before increasing amongst over 75's who perhaps struggle with physical garden maintenance. Looking at all households including zero-spenders, the higher average spend amongst over 65's reflects the large proportion of households active in the market they make up.

Source: TGI survey, Kantar Media (2016-2018).

Prospective client – pen portraits

The Horticultural Trades Association

The APL consumer pen portraits profile the two prominent consumer types that choose APL members for garden landscaping/design and spend over £5000. The segments give a detailed description of the characteristics, attributes and motivations of domestic consumers. It's important to note that not all APL consumers will fit into both segments, but they do build a picture of 75% of potential APL clients. The first of which is the '**Prosperous Pensioners**'. Read the overview on the right to get a good understanding of these consumers.



Prosperous Pensioners

Prosperous pensioners are more likely than average to be elderly retired and living comfortably. The make up 9% of GB households and 28% of APL domestic clients

A day in the life of Prosperous Pensioners

John and Patricia moved into their 3 bedroom home more than 20 years ago and are now enjoying their retirement; splitting their time amongst their many hobbies and interests. They use their savings for holidays and hobbies and are happy to pay a bit extra for a good quality product/service although they check a number of sources before making a significant purchase. Patricia does voluntary work for her local charity shop twice a week whilst John likes to spend his time researching the family history. John and Patricia value tradition and look forward to visits from their children and grandchildren. They like to relax by spending a lot of time in the garden either gardening or bird watching, they also recently had a small pond fitted.

Quick facts

- 73% are retired
- 26% visited a stately homes in the last year
- 28% are very interested in cross words/puzzles
- 3 X more likely than average to play golf in the last year.
- 45% regularly do gardening

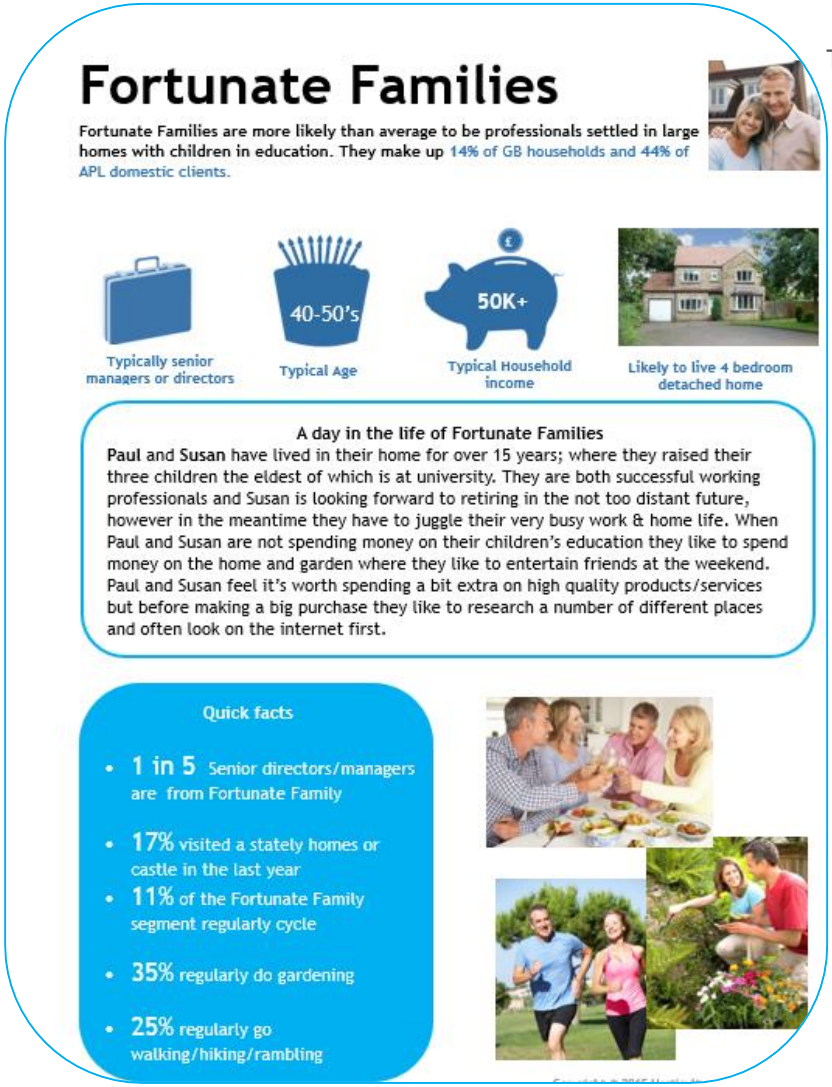
[Click here to read the full 'Prosperous Pensioners' profile](#) including how you can reach them.

Note: you will need to log in

Prospective client – pen portraits

The Horticultural Trades Association

The APL consumer pen portraits profile the two prominent consumer types that choose APL members for garden landscaping/design and spend over £5000. The segments give a detailed description of the characteristics, attributes and motivations of domestic consumers. It's important to note that not all APL consumers will fit into both segments, but they do build a picture of 75% of potential APL clients. The second of which is the '**Fortunate Families**'. Read the overview on the right to get a good understanding of these consumers.



Fortunate Families

Fortunate Families are more likely than average to be professionals settled in large homes with children in education. They make up 14% of GB households and 44% of APL domestic clients.

Typically senior managers or directors

40-50's

Typical Age

50K+

Typical Household income

Likely to live 4 bedroom detached home

A day in the life of Fortunate Families

Paul and Susan have lived in their home for over 15 years; where they raised their three children the eldest of which is at university. They are both successful working professionals and Susan is looking forward to retiring in the not too distant future, however in the meantime they have to juggle their very busy work & home life. When Paul and Susan are not spending money on their children's education they like to spend money on the home and garden where they like to entertain friends at the weekend. Paul and Susan feel it's worth spending a bit extra on high quality products/services but before making a big purchase they like to research a number of different places and often look on the internet first.

Quick facts

- 1 in 5 Senior directors/managers are from Fortunate Family
- 17% visited a stately homes or castle in the last year
- 11% of the Fortunate Family segment regularly cycle
- 35% regularly do gardening
- 25% regularly go walking/hiking/rambling

Click here to read the full 'Fortunate Families' profile including how you can reach them.

Note: you will need to log in

Closing comments

We hope you enjoyed the format and content of this report.

Please contact **marketinfo@hta.org.uk** should you have any questions.