



# Garden market analysis report 2017



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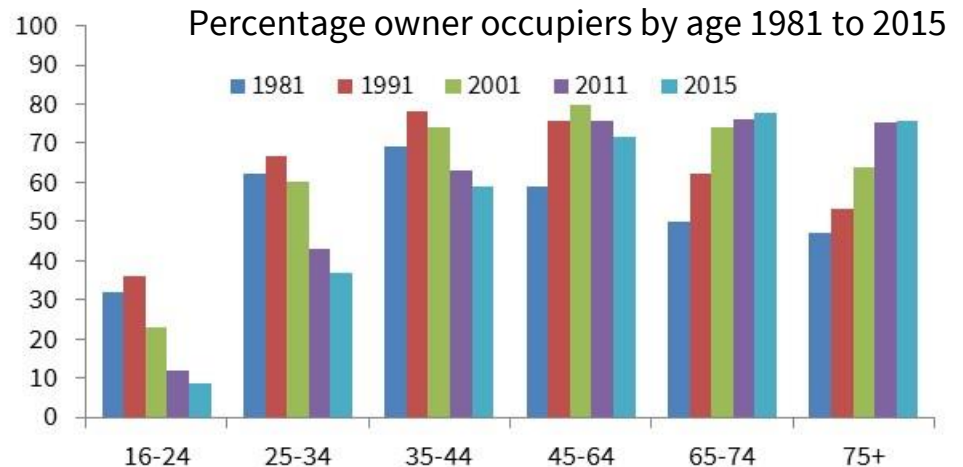
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<sup>1</sup> = channel share and performance is reported as the proportion of purchasers in a category who use a channel to purchase that category.

# Background

HTA monitors the markets in which it and its members operate. Our aim is to give members information on trends and changes in the market that support businesses in plotting their way forward and to use this to inform and influence government policy.

This report collates the different information sources available to HTA, and presents it as the ‘story’ of the consumer gardening market. It looks at the historical value of the market and key categories in it and reviews what’s influenced this. More than this though, it aims to help businesses to look forward. It describes factors that could change or disrupt the way consumers spend on their gardens. It also reviews the structure of the market and strategies which businesses are using to build competitive advantage.

We hope you enjoy the format and find the report useful.

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# Approach and sources

The HTA uses multiple sources of information as the basis for its analysis. It's the nature of data that there are sometimes anomalies, freak results and inconsistencies. Our data sources are no different, but by ensuring we're looking at things from lots of different angles we aim to be able to highlight consistent trends and patterns, and to be able to highlight exceptions where they occur.

The following sources of information are the main sources of data for this report:

## **HTA Garden Retail Monitor**

This system collects garden centre sales data and has time series data going back to 2011. We use it to get an idea of whether market and category values have grown or declined over time.

## **Kantar Media TGI survey**

This rolling survey of 24,000 GB adults runs through the year and asks consumers about their gardens, including what they have spent on them. This is the main source for HTA's market value estimates. It enables HTA to estimate the relative spend of different consumer types and regions. Like all surveys, it is subject to statistical margins of error and limits to the accuracy of respondents' recall, but still provides a sound basis for estimating garden market value and profiling consumers.

## **Foresight Factory (formerly Future Foundation)**

Foresight Factory's service looks at emerging consumer, societal and technology trends. HTA uses it to track things like adoption of technology, and the traction of new trends with the potential to affect shoppers' purchase decisions. We also draw on input from Foresight Factory on what is influencing shopper behaviour.

## **HTA's own research**

HTA runs its own consumer and member surveys and qualitative research to collect metrics on the market. We also run our own desk research into issues affecting the garden market.

# Purpose and structure of the report

The report is designed to give an overview of the size, structure and prospects of the domestic gardening products market. For the purposes of this report we are loosely defining the market as “UK consumer spending on garden plants and products for domestic gardens”. Of course in practice it is impossible to neatly separate this market from other areas. For instance issues affecting the businesses through the supply chain to this market, and the garden landscaping and maintenance services market are also discussed. However they are not the main focus of the analysis and reporting. Similarly garden retailers are increasingly selling non-garden ranges like catering and food. Although these are not a part of the market sizing and definition for the report, these are examined insofar as they affect the dynamics of consumer spending on and shopping for their gardens.

The report is structured into three main sections

1. **Major market drivers** – an exploration of the societal changes that are affecting and will influence the size and structure of the market.
2. **Market structure** – this section looks at the channels used by consumers and the competitive strategies at play in the market. It also summarises the types of consumer that make up the market
3. **Market size trends** – this section looks at the value over time of the market and categories in it, as well as analysing the performance over time of different retail channels and garden spend by age and socio-economic group

The report is designed to be used by businesses to help identify opportunities and threats in the market. HTA also uses the contents of the report to engage with government and ensure the long term issues affecting our future are considered when policy is developed. We hope you will find it useful information to feed into your future plans.