

The memories that are taken from this experience are life changing. Having seen the impact humans can have in a very short time, the importance of conservation rings through loud and clear. The value of horticultural expertise in conservation is now very apparent. Only through cooperation, good husbandry, ex-situ and in-situ conservation, and education will the battle to save plants on the edge be won. I hope the front-line holds a place for the skills I have gained through this wonderful experience.

A full report of the study is available to Mary Helliar supporters. Please contact the Secretary of I.P.P.S. GB&I Region for further information about the Scholarship.

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## Behaviour Patterns of Irish Gardening Consumers®

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### INTRODUCTION

To stem the increasing flow of nursery stock imports and to increase competitiveness in relation to nursery stock production, Irish growers must put more effort into marketing and product development. Fundamental to this is identifying and understanding the background and behaviour of the “true” customer — the end-user or consumer. The Bord Bia (Irish Food Board) research presented in this paper profiles the “typical” Irish gardening consumer, describes the motivation behind their gardening purchases and identifies the main factors influencing the decision process at point of purchase.

**Present Position of the Irish Market.** The Irish gardening market has been riding high on the strength of the overall economy — the beautiful, albeit ephemeral, Celtic Tiger. Assuming that the fickle Irish weather co-operates, sale figures are expected to remain strong for the medium term and possibly beyond. Gardening as a leisure activity is extensive among the general public and appears to be growing in popularity, as evidenced by increasing sales and growing interest in gardening programmes, shows and literature. Moreover, according to Bord Bia research, there is an increase in numbers of people classed as “novice” gardeners and a reduction in the proportion of gardeners who consider themselves “experienced”. This is good news for producers and retailers of ornamental plants, as it is the novice gardeners who are more likely to be the high spenders and are the ones most open to being influenced by promotion and marketing initiatives.

However, not all is as rosy as it seems. Ted Levitt, the former Chairman of Marketing at the Harvard Business School, pointed out: “Every major industry was once a growth industry but some that are now riding a wave of growth enthusiasm are very much in the shadow of decline. Industries that assume themselves to be riding some automatic growth escalator invariably descend into stagnation” (Levitt, 1975). Are growers complacent about the future? Could the Irish horticulture sector be accused of self-destructive shortsightedness? How can the industry avoid the seemingly unavoidable descent into stagnation?

**Proactive Marketing Tactics.** Many Irish nursery-stock growers feel that all they need to do is produce plants and customers will come. To an extent this has worked so far. However, direct imports into garden centres are increasing and are beginning to impact on the market share of domestic production. Garden centres are seeking out and obtaining the products that they know their customers want, while at the same time refusing to settle for products merely because they are readily available from Irish nurseries. Buyers are looking to suppliers to provide them with a full package including quality service, point-of-sale promotional material, reasonable price points and convenience.

Bord Bia research has found that garden centres are directly responsible for almost half of the imported containerised plants, many of which are the bread-and-butter lines. This trend appears to be on the increase and unless there are tactical changes at production level there will without doubt be casualties. One of the main problems is that many growers are too far removed from the real customer — the consumer. Gaining a greater understanding of this customer through consumer-based research is absolutely essential in order to develop a business and marketing strategy capable of meeting the demands of the market.

#### **RESULTS OF BORD BIA MARKET RESEARCH, SUMMER 2004**

During May and June of 2004, Bord Bia commissioned research designed to gain a comprehensive understanding of consumers' complete decision making process at point of purchase, in order to help the industry better understand the underlying behaviour patterns involved in purchasing plants. The research adopted a qualitative approach with eight mobile focus groups each consisting of consumers from the following categories:

- New homeowners with a garden, mixed gender.
- Homeowners or part-owners with a garden, females over 30.
- Homeowners or part-owners with a garden, either gender.

**Who is the Irish Gardening Customer?** The research identified profiles of three typical plant purchaser types based on gardening requirements.

***Empty and Bare Gardener.*** These are young to middle aged novice gardeners often in their first home with young and active children. They are in full-time employment, have time restrictions and do not have excessive disposable cash to use on the garden. Their gardens are immature and require plants that cover bare patches, improve privacy, and can withstand the onslaught of the "terrible" 2 year old. This group tends to buy a mixture of large plants such as apple trees, Japanese maples, ornamental cherry, and smaller, cheap, and cheerful flowering plants that can add colour and interest to specific areas of the garden.

***Low Maintenance and Aesthetics Gardener.*** This group is made up of middle-aged consumers with poor to average gardening skills. They have a medium- to small-sized gardens with some hard landscaping, e.g., patio or decking. They are time-poor and cash-rich and generally use the garden for barbeques, socializing, and relaxing. They are generally looking for colourful, eye catching, focal point plants, and flowering plants that require little effort but have a high impact. "Quick fix" solutions and convenience, such as containerised plants, multi-packs, conifers, and semi-mature trees, are high on their wish list. This consumer would be the most prone to spending above their budget on a trip to a garden centre and tend to buy on impulse if a plant attracts them.

**Development and Improvement Gardener:** These are mature and experienced gardeners with an established garden. They generally have a full and active social life but tend to spend a lot of spare time in the garden, which they enjoy and find challenging. They are generally careful about spending cash on plants and value for money is a major motivator when purchasing. The challenge for this gardener is to implement change by adding colour and interest to the garden while keeping costs to a minimum. They tend to buy selections of annuals and perennials to flower at different times during the year. As this group ages they will look for low maintenance alternatives to the intensive labour aspect of gardening.

The first two profiles epitomise the main garden centre customers and should be the focus of any marketing or promotional campaign.

**The Gardening Customer: Their Problems.** The majority of Irish gardening customers lack confidence in their gardening skills. They want to be provided with solutions to their gardening needs and, as part of the “instant gratification” era, are looking for colourful and structural plants, which provide an immediate impact. However, at least in the case of empty and bare gardeners they are often unable to afford expensive solutions to satisfy this need. Juggling full-time work with family and social commitments leaves them little time or inclination for working in the garden, so ease of maintenance is key in the decision making process.

**Identifying Needs and Solutions.** The typical gardening consumer is looking for stimulation and relaxation from their garden. Because they lack the knowledge to achieve this without help they are open to being led, coaxed, beguiled, and convinced into buying. Filling that space, hiding that wall or just achieving the “wow” factor to impress their friends are the sort of gardening tasks facing the typical consumer.

The supplier (grower) therefore has three responsibilities.

- 1) To provide solutions in the form of appropriate plants.
- 2) To convince the consumer that your product is what they need.
- 3) To provide the information to help them grow it successfully.

In order to achieve this, the grower must first truly understand who the customer really is, what their needs are and what turns them on.

As a part of the research conducted on behalf of Bord Bia, each of the focus group members were asked to go into a selected garden centre and spend €100 on plants. They were asked to record the name of the plant, the price, and the reason why they would have made the purchases. Table 1 shows how the focus group consumers made their purchases. Nearly 60% of the purchases were of plants in flower. Many of these were high impact and showy such as hydrangea, rhododendron, and rose, all of which were in flower at the time of the study. In addition, 45% of participants bought bedding plants or cited the colour or the flower specifically as their main reason for buying a particular plant. Other reasons for purchasing included length of flowering period, ease of maintenance, evergreen foliage, and/or to fulfill a specific purpose. Lastly, 10% of plants bought were specifically for growing in containers. The most common price points were €6.99, €19.99, and €48.99. It was evident from the in-depth discussions that cost was a relatively minor factor until it reached around €50.00. After that point value for money was related to the maturity of the plant. Small trees were bought as focal points and climbers were needed to cover and add interest to walls and fences.

**Table 1.** Consumer plant purchasing patterns in garden centres.

	Plant Group	Proportion of consumers purchasing (%)
Flowering plants	Herbaceous perennial (flowering plants incl. heather)	24
	Flowering shrub (incl. rose)	18
	Bedding plant	17
Colour and purpose	Climber	11
Focal point	Small tree	10
	Minor groups	
Structure and interest	Shrubs for foliage	6
	Conifer	3

### FACTORS AFFECTING CONSUMER PURCHASES

The research identified the main factors affecting the purchase decision process as aesthetic appeal, value for money, presentation, information, and ease of maintenance.

**Aesthetic Appeal.** Visual appearance attracts the consumer initially and has a powerful impact on influencing the purchase decision. The important factors include shape and colour of present or potential flowers, and a healthy appearance, specifically where leaves are fresh and glossy. The importance of being in bloom at the time of purchase correlated with the level of experience and time of year. Generally, the novice gardener would be more likely to purchase plants already in flower, while the more experienced gardeners viewed the future flowering potential as being the better option. However, most agreed that as the season progressed they were more interested in purchasing plants in flower, as they were generally looking for additional colour to add to an already established garden.

**Value for Money.** Younger age groups tended to be considerably less price sensitive than their older counterparts with many of them wildly off the mark when asked to price the various plants presented to them. Among the groups there was a general consensus that value for money was directly related to plant maturity and presentation. They also felt that potential longevity of the plant justified higher prices. Most participants were prepared to pay a little extra for greater maturity. However, although the younger gardeners might have a greater appetite for mature plants or "quick fix" solutions to their gardening problems, they are not necessarily more likely to be in a financial position to act upon this.

Impulse purchasing is also characteristic of garden centre customers with many claiming that they rarely go to a garden centre with a pre-set budget and a specific shopping list. Many of the mature women stated that they would always have the credit card available just in case something would catch their eye. And many said that they would be unlikely to limit their visit and often remained in garden centres for over one hour or longer if there was a restaurant and/or children's play area. Previous research suggests that the longer a customer remains on the premises the more susceptible they are to being swayed or tempted by attractive well-positioned and presented products.

**Information.** The importance of information cannot be over-emphasised. Most garden centre customers do not have the experience or the confidence to make purchase decisions without a minimum of information including price, care instructions/requirements, growing habit, and flowering period. In the absence of either information or service, the potential buyer will simply walk away, translating into a lost sale.

**Presentation.** Presentation, which includes containers, multi-packs, accompanying point of sale material, information and product enhancement, plays a key role in influencing buying behaviour. In almost all cases there was unanimous agreement that not only did presentation help sell plants but also helped justify higher prices. Multi-packs of assorted plants were well regarded; with participants who found that the pre-selected combinations made the purchase decision easier, by letting them know what plants could be planted together. Interestingly, a coloured pot was regarded as doing little to encourage a sale. In fact, many felt that it “cheapened” the plant, saying that they preferred the black- or terracotta-coloured pots. However, many conceded that as one part of a colour-coordinated package (flowers, point of sale material, etc.) the coloured pot could be attractive.

**Ease of Maintenance.** The majority of participants, particularly younger age groups, said ease of growing was of paramount importance. For some, this was driven by convenience and time restrictions, while for others the primary motivator was lack of experience and/or confidence in their own ability.

## CONCLUSION

Bord Bia research identified three main gardening consumer types, two of which constitute the main garden centre customers. Although they have slightly different needs they share several commonalities. They both lack gardening know-how and time and they both require information, stimulation, and guidance.

Growers can no longer leave the selling entirely up to the retailer. They must make the effort to differentiate their product and to convince the consumer that the product satisfies their need. The research shows that attractively presented products can sway the “browser” into making a purchase decision even when there was no intention to buy anything in the first place. Although most gardeners, especially the “novice” are not price sensitive, once the cost goes above €50 value for money is viewed in relation to maturity of the plant and/or value-added elements, such as container, husbandry etc.

“Marketing myopia” is a serious condition with far-reaching consequences. Luckily the treatment is a relatively simple one: development and implementation of a well-planned market-based strategic marketing programme.

## LITERATURE CITED

Levitt, T. 1975. Marketing myopia. *Harvard Business Review* 53 Sept – Oct.