National Gardening Survey:

Food Gardening Earns **More Than Flowers**

This year's survey highlights the growth in food, the perception of box stores among gardeners and a surprisingly strong demographic: **young men.**

by Ian Baldwin

Most readers will be familiar with a couple of statistics from the National Gardening Association's research (**GardenResearch.com**), such as the annual household spend per year on "gardening" or the total size of the market each year. The National Gardening Survey (NGS) has been tracking both gardening activity and money spent by American householders since 1981, and for the last three years I have been able to analyze and comment on this 260-page national treasure trove of data and trends.

This year's survey has some big surprises, including why what I call "food gardening" is out earning flower gardening and how young males are the new power gardening spenders. But first, some basics.

Consumers reported on everything they spent on food gardening, not just the plants.

Individual Spending Is Down, But More Are Buying

The key number the industry hears every year, the Lawn and Garden spend per household, dropped for the fifth year in a row (by $4) to a miserly $347, the lowest since the mid-1990s. However the size of the total DIY market rose to $29.4 billion because more households participated.

This is very encouraging. Not only did more consumers — now 85 million or 72 percent of all U.S. households — get out in the garden, 15 out of 16 categories ("Bird & Pet" was flat) saw increases in gardening activity .

So if participation is up, why does spending continue to decline? The overall spending picture is dominated by the two big ticket categories: lawn care and DIY landscaping (which includes trees and shrubs), accounting for around 48 percent of total DIY market. The sales in these two categories alone have declined by $6.4 billion, or 30 percent, since 2007.

More Buying, But Not For Big-Ticket Items

In the 16 gardening categories, the picture is different. Spending increased in 12 of the 16 activities tracked. We saw standout growth in the four categories I call "food gardening," now a traffic driver for many lawn and garden retailers, together with container gardening and water gardening (which also includes fountains, even small table-top bubblers). The growth in these activities, together with the continued decline in big ticket activities, suggests that the consumer is not yet ready for large scale capital investment in their gardens. They are loosening the purse strings a little and increasing the decoration and self-indulgence products.

Food Gardening Drives More Than Just Plant Sales

Once again, food gardening, including vegetables, fruit and herbs, gets the headlines and is at a six-year high.

Retailers tell me that this is all well and good, but their hanging basket sales are still bigger than all their veggies and herbs, which are small and low-ticket.

So why is there a difference between what retailers are saying and what the survey shows? It's because NGS records all the spending on an activity, not just the plant. For vegetables and herbs sales, the actual plant can be a minor cost compared to the amendments, raised beds, irrigation, fertilizers, cages, pest and disease control and so on.

In fact, when compared like this as activities and not POS sub-class reports, the national food-gardening spend is $1.2 billion larger than the nation's flower-gardening spend! Retailers must look long and hard at how much business they are missing by *not* carrying all the non-plant products consumers need for food gardening, including all those harvesting and preserving supplies.

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Local Garden Centers Are Not Preferred By Gardeners

In the last two years the NGS has added a question investigating where householders buy their lawn and garden supplies. No surprise to see that 54 percent of the market now lies with the home centers (including Home Depot, Lowe's, Menards and Orchard Supply Hardware), mass merchants (Walmart, Kmart and similar stores that sell gardening supplies) and supermarkets, which gain sales through easy, quick-turning color on the sidewalk. If we add in some of the larger chains of farm/ranch/pet, that figure probably climbs over 60 percent.

Independent garden centers win 17 percent of the market, but independent hardware stores are only 2 percent behind. That's remarkable, considering few of them do a significant plant business. Is that where all those non-plant supplies for food gardening are sold?

One of the most strategy-challenging sections of the NGS is where it asks respondents how their lawn and garden spending is divvied up by the different places they can buy garden supplies (using the same choices as above — home centers, mass merchants, independent garden centers, etc. Their responses reveal where their buying loyalty lies.

Many people in the garden center world would probably assume that the core garden center shopper, who already accepts they will pay more in return for better service and quality, gives most of their lawn and garden business to that channel. Not so. In fact the home centers win that battle, easily capturing 59 percent of their customers' yearly lawn and garden dollars. That compares with 51 percent at the mass merchants, 48 percent at garden centers and 47 percent at hardware stores.

My question to garden center owners, buyers and managers is: Why do full-service garden centers customers choose to spend 52 percent of all their lawn and garden dollars in other channels?

This one single NGS stat shows how far many garden centers have moved from being the local go-to gardening shop.

Under 34 And Over 55 Gardeners Are The Most Avid

An immediate, striking demographic fact in this year's NGS is that household participation in lawn and garden shows a very large increase at opposite ends of the spectrum. The 18-34 and over 55 groups both reached a six-year participation high. Obviously one year's statistic is not enough to draw long-range conclusions, but it would appear that the polarization of garden activity shown in the last two years of NGS continues.

Does this point to a lack of interest or a lack of disposable income in the middle two demographic age groups from 35 to 54? The NGS also shows that householders from 35 to 54 have a steady six-year decline in lawn and garden spend, too. Maybe we have not made the sale to these cash-strapped groups. They are not convinced that activity in the garden is worth spending any more time or money on.

It may be worse; gardening may be an aspect of discretionary spending they are consciously reducing when faced with more appealing things like movies on demand, concerts or eating out.

A Key Group Is Spending Less

Traditionally the older males spent most as they replaced machinery and continued larger projects involving trees, shrubs and landscape supplies. In fact by 2011, male and female over

How Lawn & Garden Retail Outlet Total Sales Changed From 2011-2012

	Total Sales 2011 (in millions)	Total Sales 2012 (in millions)	Change in %
Home Center	$8,729	$7,951	-8%
Mass Merchandiser	$6,110	$5,890	-3%
Garden Center	$4,947	$5,006	+1%
Hardware Store	$4,074	$4,417	+8%
Supermarket/Drug Store	$1,745	$2,061	+18%
Mail-Order/Internet	$873	$1,178	+34%
Other	$2,619	$2,945	+1%
TOTAL (Net)	$29,097	$29,451	+1%

National Garden Association's 2013 National Gardening Survey

> The biggest spending increase in *any* group in 2012 were males under 34.

55 together constituted a massive 46 percent of the entire lawn and garden market in the country, with males taking 29 percent and females 17 percent. The industry is worryingly dependent on an age group heading for retirement, life on a fixed income and a significant health changes.

Interestingly spending declined last year among men over 55, who up to now had still been driving the maintenance and big-ticket categories. And for several years now, females over 55 have reduced their spending. Even though females over 55 are still very active in gardening participation, their spending is in decline. Maybe they are decorating more now with flowers, containers and accents rather than constructing whole perennial borders, à la Martha.

Some might use this as a reason not to feminize our stores and to reduce the gifts, décor, accents and froofroo, as some call it, but I would urge just the opposite. Older females are generous grandmothers, homemakers and retirees with disposable time and money. They are influencers on Facebook, Pinterest, etc., and are frequent garden retail customers. Also, the desire for a clean, modern, inviting shopping experience is not age or gender specific. So I am not advocating replacing gift and accents with mountains of lawn food or raised beds. We have to provide both.

Young Men May Be The New Power Customer For Garden Centers

Given the lawn and garden industry's age dependency, the biggest ah-ha moment for me was when I drilled down in the 260-page NGS and realized the biggest spending demographic group, and biggest spending increase in *any* group in 2012, were males under 34.

These younger males with a household spend of $441 (beating the national average by almost $100) outspent men over 55, the traditional winner, and women of all ages.

Anecdotally, I hear of younger males showing strong interest in classes, workshops and online information. And they clearly are a big part of the food-gardening movement. So this is great news for the garden center industry right?

Not so fast. This age group (including both genders) is the *only* demographic in the NGS to choose independent hardware stores as their No. 1 lawn and garden provider. For the second year in a row, the hardware store wins the younger vote.

Is it simply that many of these consumers don't own a home yet and are shopping for small items and they will move to a more complete lawn and garden retailer when they buy a house, fix up a lawn and plant a garden? Time will tell.

Use These Results To Create A Plan

As in previous years, this NGS analysis reveals some stunning truths. This year we find that our latest knight in shining armor is the 18-34 year old male. Who would have predicted that?

This report can be sliced and diced a hundred ways, but there's no doubt that lawn and garden is coming back driven by two groups almost from different planets. One message will no longer fit all. Thankfully, there's no sign in the NGS that gardening will fade away if we can make the sale and create a compelling value proposition. That's the next step in our journey. TGC

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What You Need To Know About The National Gardening Survey

The survey, handled by a professional polling company, asks a balanced sample of householders for information on what they did in the garden, what they bought, how much they spent and where they shopped. It is important to point out that the survey breaks gardening into 16 categories of activity such as lawn care, container gardening, growing vegetables and so on. The survey asks if a respondent actually participated in an activity at all, and if so, what they spent on it in total.

So the answer from a householder who replied "yes" to the "growing berries" category would include the cost of the plant, the planting mix, the shovel, mulch, soil, fertilizer, bird netting and so on — the whole activity. These spending trends may not align with retail POS reports, which tracks plant sales separately from fertilizers (but most good POS systems could run a report that way if asked to…). Those surveyed are grouped demographically by age, gender, earnings, education, employment status and whether there are children at home or not.

It is also important to say that this entire survey is about Do-It-Yourself (DIY) gardening and does not include spending on Do-It-For-Me gardening — though the NGS does ask if the householders used contractors, lawn/tree service, etc. Neither does the NGS track casual furniture, patio, gift, personal or Christmas.