



The Thinking House

BORD BIA INSIGHT CENTRE



# Gardening in Ireland

## Glas 2017

***Gardening in Ireland was conducted in conjunction with Red C.***

***Bord Bia***  
Irish Food Board

***The research took place between March and April 2017.***

**REDC**



# The research approach



## National Survey

A nationwide telephone omnibus survey with a sample of **n=1,002** to establish gardening incidence and profiles



## Gardener Survey

A large scale online survey of **n=1,024 gardeners** across Ireland.

*20 minute interview* providing a detailed view of gardener's behaviours and attitudes



## Garden Safaris

We visited **n=12 gardens** in Dublin, Cork and Donegal to understand influences, plans and behaviours "on-site".

We spoke to good intenders, novices and pros. We revisited **n=4** to see how their plans had progressed 3-4 weeks later.



## Store Safaris

We accompanied a selection of **n=4 prospective gardeners** to garden centres to get their views on store layouts, navigability and suitability for their needs.



## Expert Interviews

We also spoke with **n=2 garden centre managers** to explore current trends and market dynamics.





Meet Ireland's Gardeners



Gardener of the Future



12 things to look out for...



Mega Market Forces



Some Big Plays

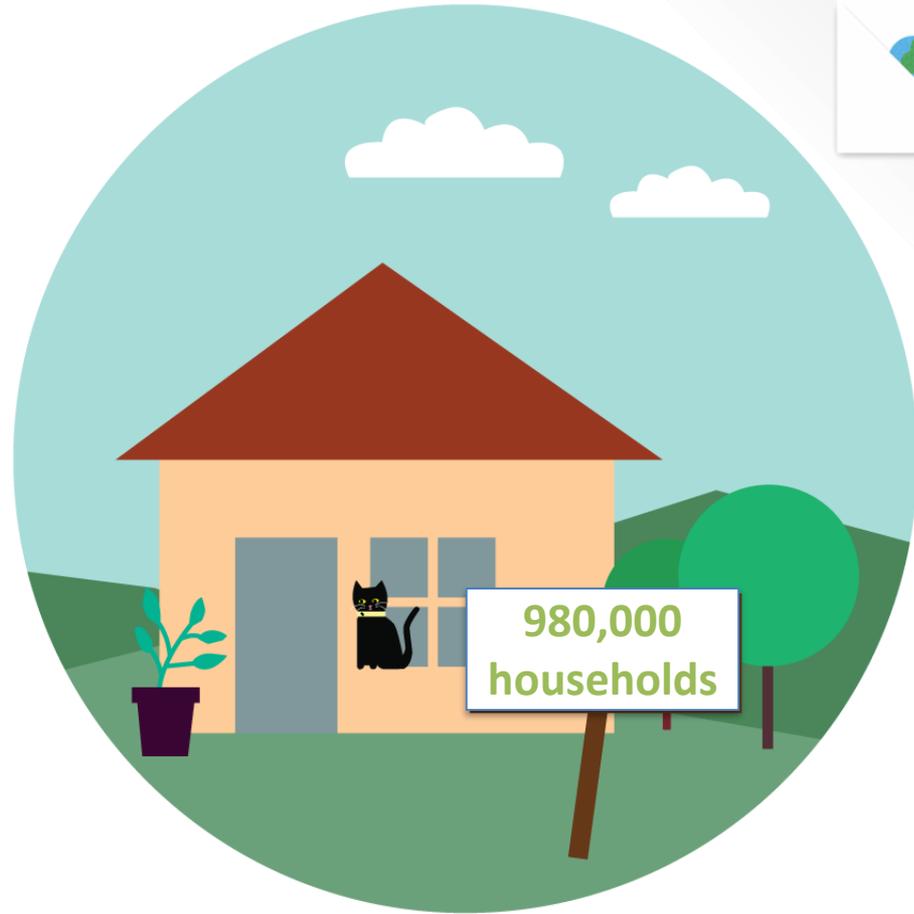




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# Meet Ireland's Gardeners



# Relative to the total population Gardeners are....

More likely to be..

*Women*



**63% of  
Gardeners**

*60% of spend*

*Older*



**Average age –  
49 Years  
4 in 10 over 55+**

*43% of spend 55+*

Less likely to be..

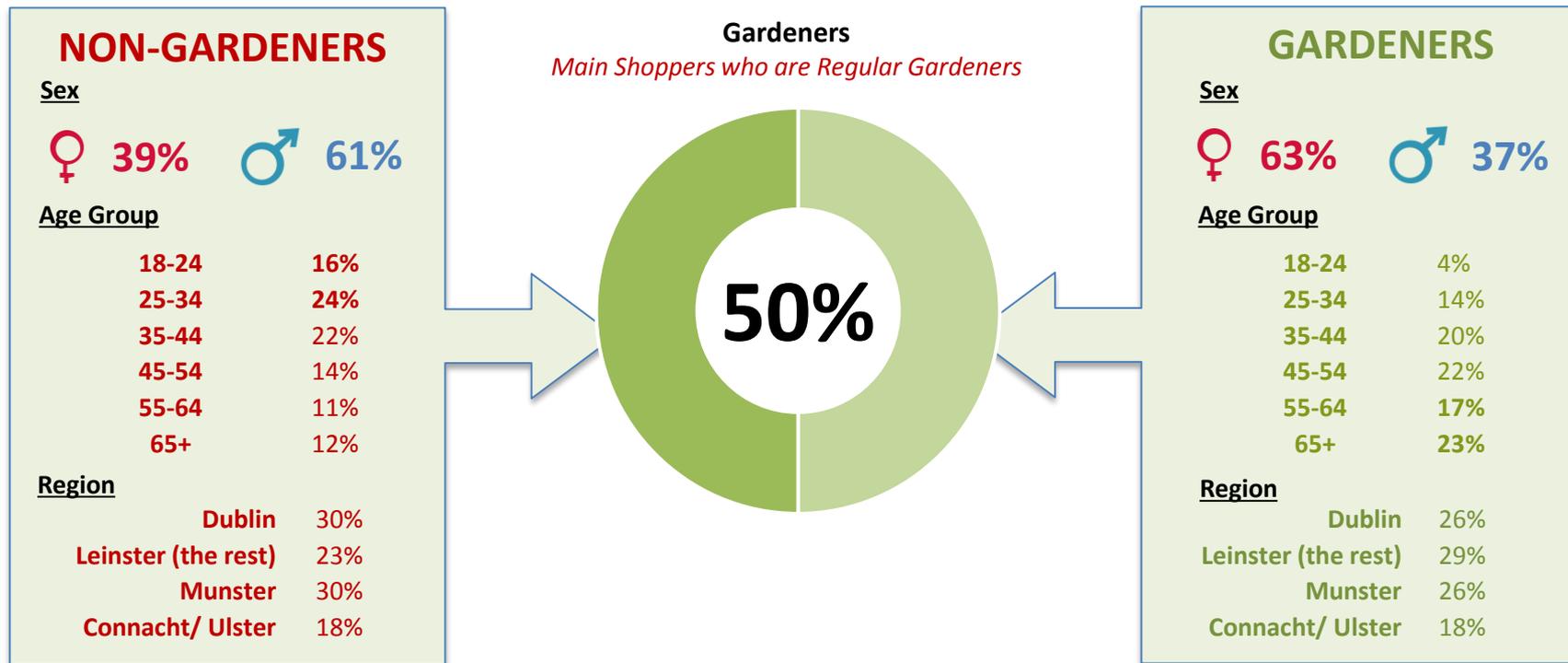
*Living in Dublin*



**26% of  
Gardeners**



# Profiling Gardeners: Who are they?



# What do they do.....REGULARLY

*Planting Flowers & Shrubs*



**31%** *Sowing or Planting Vegetables /Fruit*



**19%**

*Designing & Placing hanging Baskets/ window boxes*



**22%**

*Hardscaping paving & maintenance*



**11%**

*Lawn Care*



**21%**

*Planting Hedging or Trees*



**10%**

*Sowing or Planting Herbs*



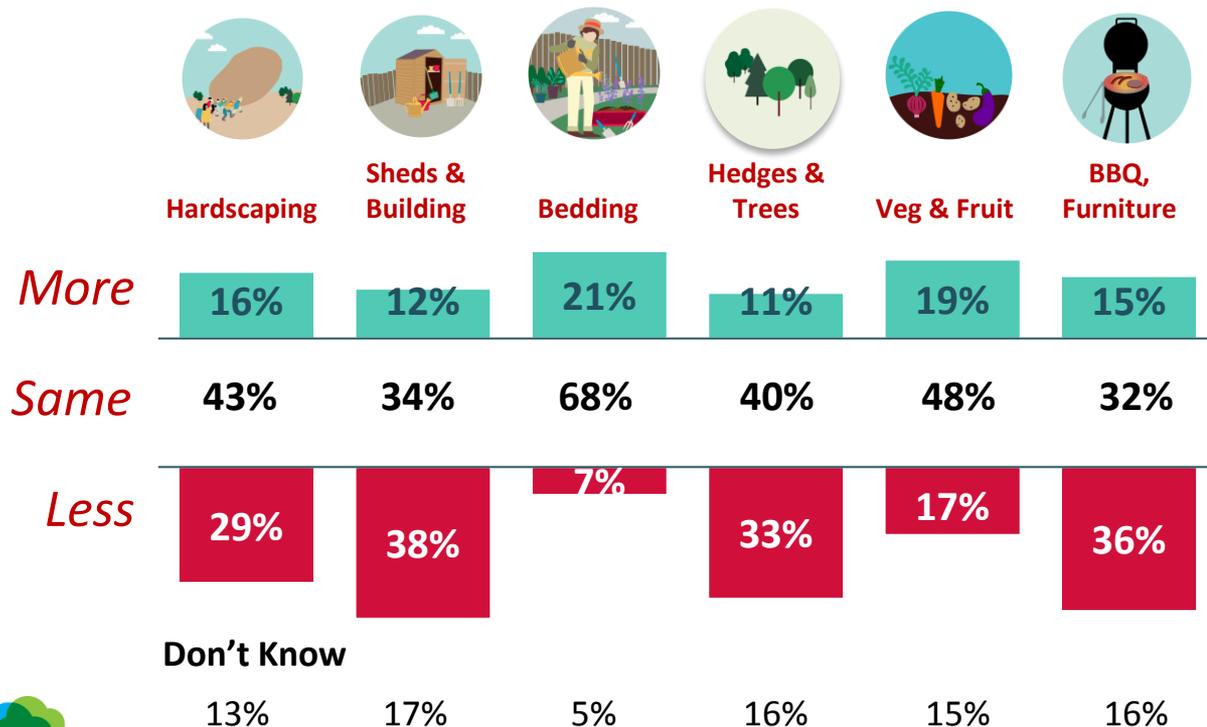
**21%**



# Where people are spending more and less....

(All Regular Plant Buyers and Gardeners – n = 902)

Do you intend to spend more less or about the same as you did this year....

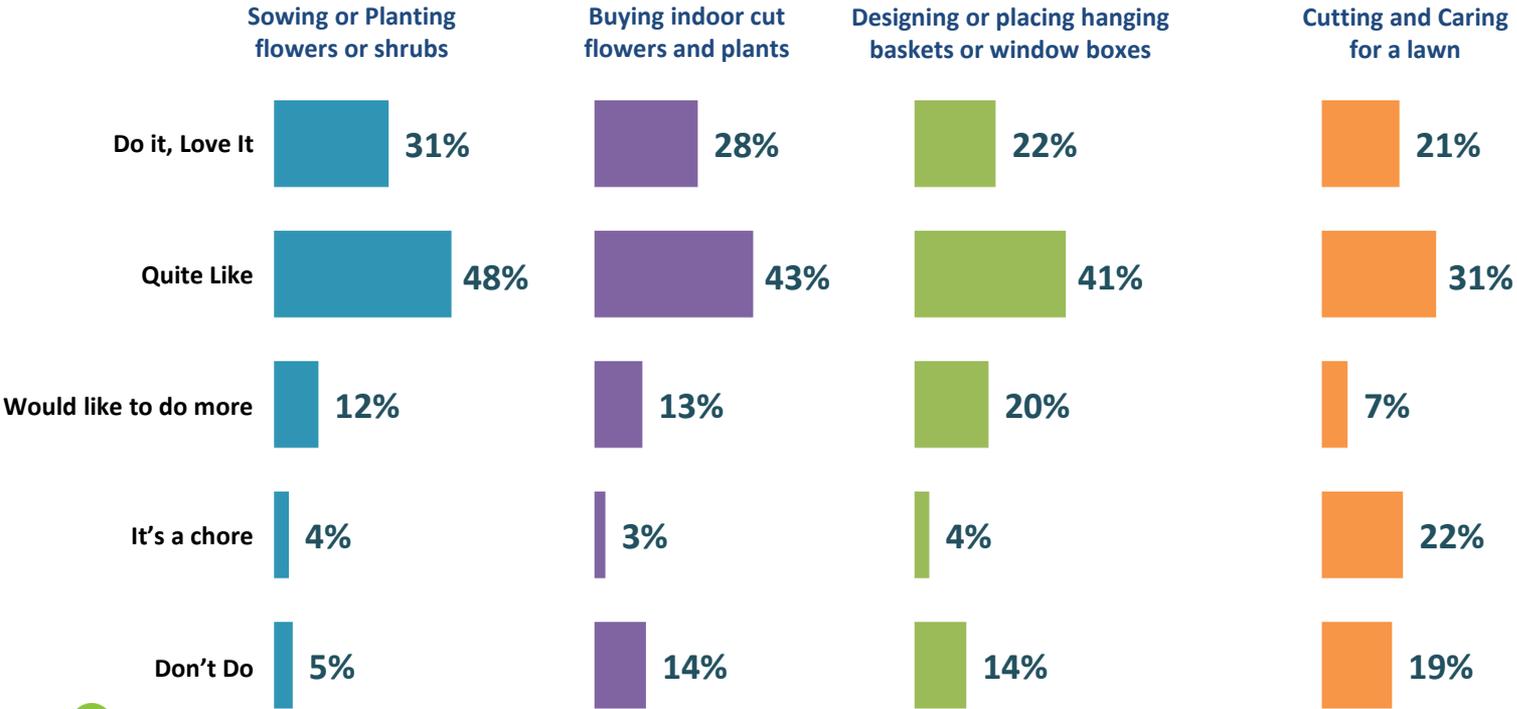


*In general the focus is on spending less next year with the exception of fruit and veg and decorative bedding plants.*



# Engagement in Gardening Activities

(Base: All regular Plant Buyers and Gardeners; n=902)





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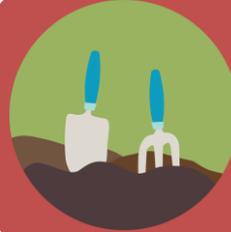
# Segments & Profiling

# Who Are They?



## ENTHUSIASTS

Regularly engage in some type of gardening and love it



## FLEDGLINGS

Don't garden much but have a desire to do so in the near future



## ACTIVES

Do gardening regularly and quite like it



## RELUCTANTS

Do some gardening but it's all a chore; not something they want to do



## DEVELOPERS

Do some gardening now, would like to do more in future



## AVOIDERS

Don't garden nor want to.



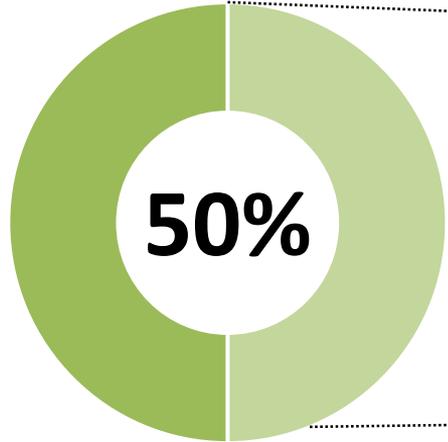
# Exploring Typologies

## GARDENERS ONLY



### Gardeners

*Main Shoppers who are Regular Gardeners*



	% of Gardeners	% of Total	# in Population
Enthusiasts	29%	13%	464,277
Actives	52%	24%	857,127
Developers	10%	5%	178,568
Fledglings	14%	7%	249,995
			<b>428,563</b>
Reluctants/ Avoiders (NOT GARDENERS)	n/a	55%	1,785,682





# ENTHUSIASTS



## Gender

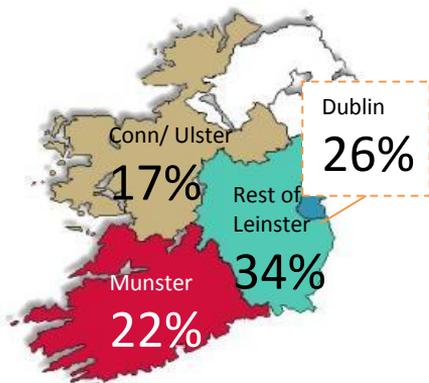


69% 31%

## Average Age

51 yrs.

## Region



## What Kind of Gardens do they have?





# ENTHUSIASTS



Average Annual Spending on Garden\*  
**€381**

Tend to Buy in....  
**Independent Garden Centres**



Pre family

**23%**



Family

**38%**



Post family

**39%**

## Lifestage

## What they do?

Planting Flowers & Shrubs **98%**



Designing & Placing hanging Baskets/ window boxes **87%**



Sowing or Planting Herbs **87%**



Sowing or Planting Vegetables /Fruit **83%**



Lawn Care **76%**



Planting Hedging or Trees **70%**



Hardscaping paving & maintenance **67%**



\* Selected items excluding compost, fertilisers and similar



# FLEDGLINGS

&



# DEVELOPERS



## Gender

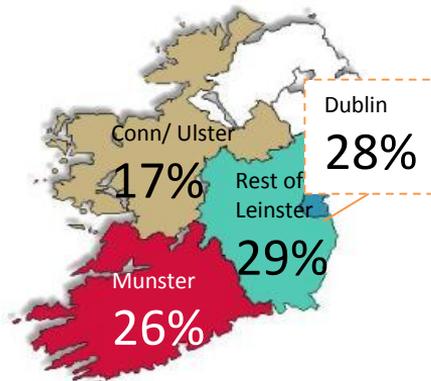


65% 35%

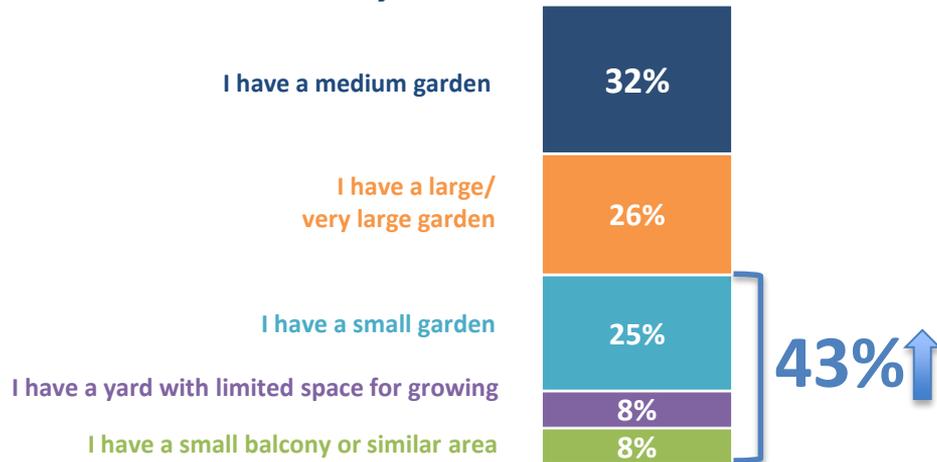
## Average Age

45 yrs.

## Region



## What Kind of Gardens do they have?





# FLEDGLINGS

&



# DEVELOPERS



Average Annual Spending on Garden  
**€189\***

## Lifestage

Tends to Buy in...  
**DIY Stores**



Pre family

**32%**



Family

**43%**



Post family

**25%**

Lawn Care



**66%**

Do now  
Like to do in Future  
**11%**

Hardscaping paving & maintenance



**40%**

**27%**

Planting Flowers & Shrubs



**36%**

**49%**

Planting Hedging or Trees



**20%**

**42%**

Designing & Placing hanging Baskets/ window boxes



**19%**

**52%**

Sowing or Planting Herbs



**10%**

**67%**

Sowing or Planting Vegetables /Fruit



**7%**

**68%**

\* Selected items excluding compost, fertilisers and similar





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# Gardener of the Future



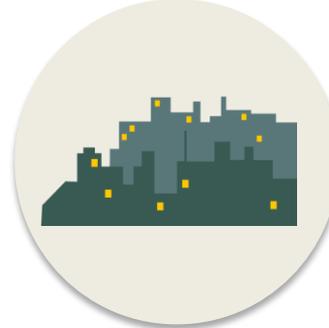
# The Gardener of the Future Will Be.....



Eco Aware



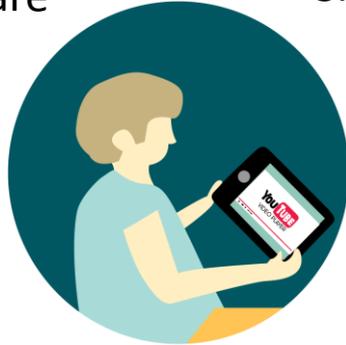
Simpler



Compact



GYO Advocates



Connected



Collaborative



Younger



# The Gardener of the Future



## Simpler



Having a garden which is **easy to maintain** is becoming more popular and more important.



44% say that **time** holds them back from gardening. Higher amongst 25-34 year olds (63%) and Young & Free (71%)



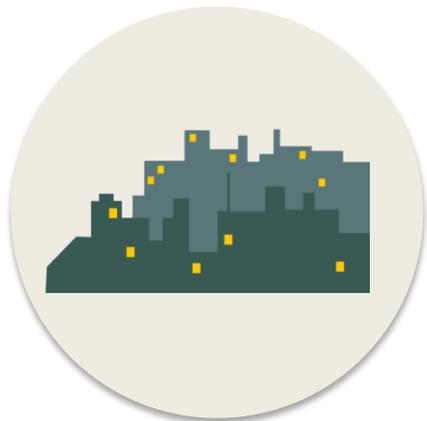
Finally, if it **was low or no maintenance** it would encourage 75% of people to garden more and this is higher among younger demographics



# The Gardener of the Future



## Compact



While higher amongst those living in urban areas, there is an interest in gardening more if people could do **it effectively in small spaces**.



**A third of all pre-family have limited or no gardening space to grow**



With 63% of the Irish population living in urban areas and an annual urbanisation change of +1.6% this will become ever-more important (CSO).



**59% say that if they could do it in a small space it would encourage them to garden more**



# The Gardener of the Future

## GYO



A lot of interest in **growing your own vegetables, herbs, fruit** – especially among the younger people we talked to.



A vegetable patch or area is the most popular planned feature to have in a garden in the next 3 years (19%).



*This is higher amongst 25-34 year olds (25%)*



70% say that growing fruit/vegetables that they could eat would encourage them to garden more.,.,.,



# The Gardener of the Future



Aspiring and Novice gardeners are even **more atuned to their environmental responsibilities.**

Composting is expected, rainwater harvesting an obvious choice and local sourcing and native planting and consideration for bees as well as companion planting for natural pest control.

## Eco



## Connected



In a connected world, the **gardener of the future will embrace the benefits of new technology for inspiration, advice and management**



The online retailing channel is still in its infancy in the world of gardeners, but this is likely to develop further in the future.



# The Gardener of the Future

## Collaborative



Younger gardeners and aspiring growers **seek guidance** from a variety of sources; online and offline including groups, clubs and also from the more experienced



There is an opportunity to develop a portal for interested novices to develop the mission to attract new gardeners.



While gardening interest will remain limited among the “young and free” groups, it is growing in interest terms among **the early settler and young family groups**.

## Younger





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12 things to look out for....



# Accessorisation: Lighting, Ornaments



NOW  
 LATER

# Blurring the Seasons

*Seeking year round colour*



NOW  
 LATER

# “Room”scaping



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NOW  
 LATER



# Naturalism & Sensitive Gardening

NOW  
 LATER

# Medicinal Gardening



NOW  
 LATER

# Natural Killers to Protect Pollinators



NOW  
 LATER



# More hardy pot and container plants for “generation rent”

*“year of the Zinnia and the bean”*

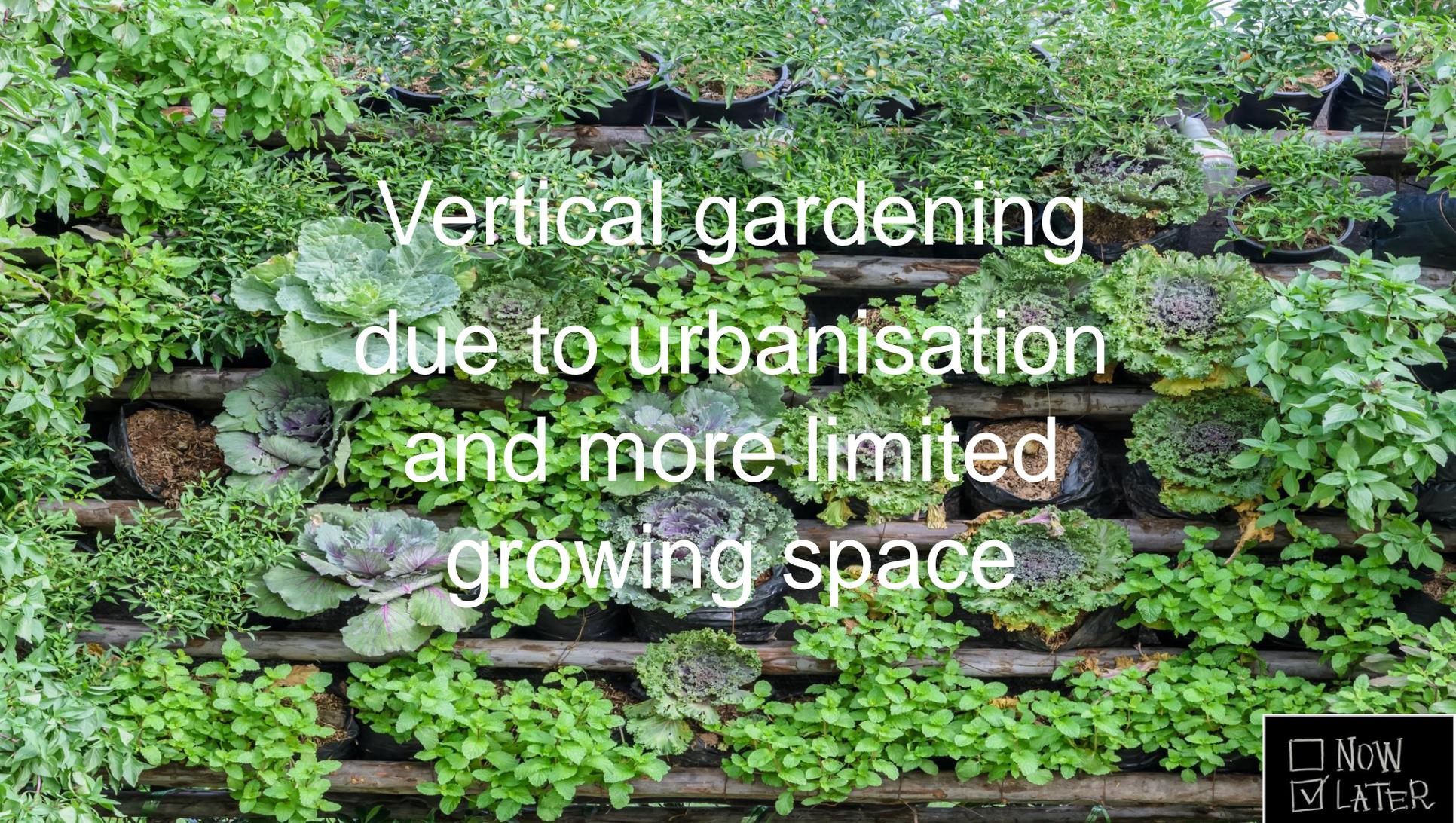
NOW  
 LATER



# Micro Gardening

*John Lewis has cactus as a trend for 2017*

NOW  
 LATER



Vertical gardening  
due to urbanisation  
and more limited  
growing space

NOW  
 LATER

One to Watch

# Indoor gardening for food, aesthetics and wellness....

Lighting, Hydro systems etc



NOW  
 LATER



# UBERISATION

Garden Surprises to your door.....

NOW  
 LATER



# Forest bathing & Flora Tourism

NOW  
 LATER



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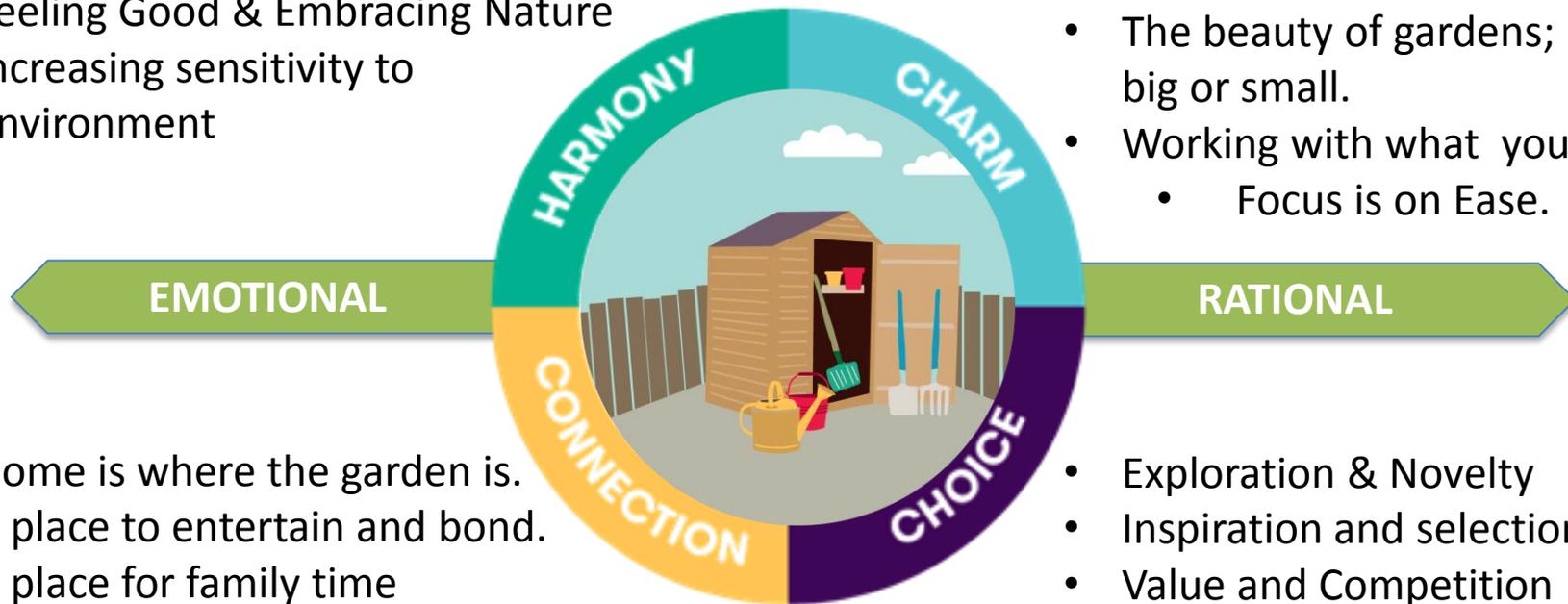
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# Mega Market Forces

# Mega Market Forces



- Feeling Good & Embracing Nature
- Increasing sensitivity to environment



- The beauty of gardens; however big or small.
- Working with what you have
  - Focus is on Ease.

- Home is where the garden is.
- A place to entertain and bond.
- A place for family time

- Exploration & Novelty
- Inspiration and selection
- Value and Competition



# Mega Market

## Forces

## & Supporting





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“CONNECTION”





## "CONNECTION" GROWTH ZONES



### **Alfresco Lives:**

Extending the garden to the great outdoors



### **Home Haven:**

Gardens for family fun



### **Kindred times:**

The intergenerational experience





# **57%** of adults nationally believe that their Garden is like another room for entertaining

It's another room really. In the summer we'd have our breakfast out here and have BBQs in the evening  
(Female, 55+, Dublin)





**57%** of gardeners have a patio or decking area and **35%** have a BBQ area





**17%**  
of Gardening  
Spend is on  
BBQ's/Outdoor  
Furnishings





Home Haven

# 8 in 10

## with Kids consider their Garden a playground



Our garden is like another room for us and the kids. It's where we spend most of our time when the weather is good.  
(Female, 30, Cork, 2 young kids)



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*Bord Bia*  
Irish Food Board



73%

When I was growing up I used to spend a lot of time with my Dad in the garden. Now I love it and hope I will pass it on to my children too  
(Male, 24, Dublin)

Kindred Times

of gardeners use it is a space for bonding with family; young and old.





## Growth Zones for Connections:



### Alfresco Lives



### Home Haven



### Kindred Spirit



### Growers

Be part of the room  
scaping!

Playful garden solutions  
For eg tough borders

Shared product  
opportunities



### Retail

Total solutions and  
inspiring display areas...

Promote the joy and  
extend to playtime  
solutions (goals etc)

Family share packs and  
multi-buy options. Gift  
zone.





# Personal value seekers

Consumer Lifestyle Trends



“I’m willing to spend money on the things that are valuable to me, and am pursuing more creative ways of getting what I want”

Kindred Spirit



LOU P APÉ

La cuisine de grand-mère, chez vous.

The Shared economy is enabling information sharing in new ways for eg Lou Pape in France provide senior culinary expertise on line.

**Why not apply to gardening?**





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“CHARM”





## "CHARM" GROWTH ZONES



### **Effortless aesthetic:**

Low maintenance gardens for eg hedging, perennial options



### **Striking style:**

Adding value to the home, framing the house..



### **Compact ecology:**

A modern need for smaller living spaces





## Busy lives are a key barrier to Gardening

**45%** of adults say that gardening is just too much hassle

Among Gardeners, **time is the third biggest barrier to Gardening**

Every year I get fresh hanging baskets done up. It makes the garden look summery and pretty but it doesn't require too much effort after they're up. I just don't have time for that.  
(Female, 30, Cork, Young Family)





**75%** of gardeners say they would be encouraged to do more if it was **low or no maintenance**



This rises to **86%** among Potential Gardeners, the most likely thing to encourage them to Garden





None of my neighbours do anything with their garden and it drives me crazy. I love to have it looking nice – for myself and for passers by,  
(Female, over 50, Dublin)



**51%** of adults are proud of their Garden and like to show it off

Bedding and decorative plants are key for tapping into this desire.

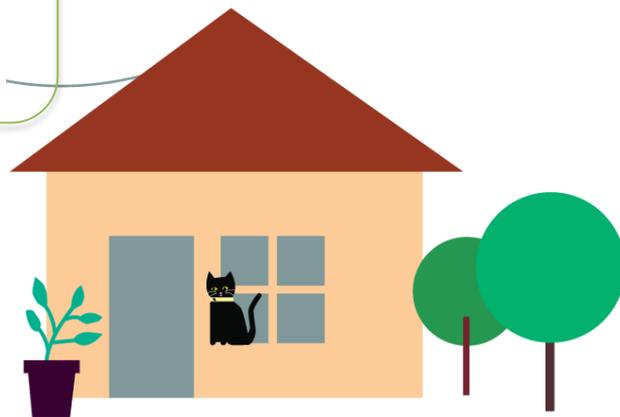
This rises to **78%** among Gardeners





I wouldn't consider myself the best gardener in the world but I get a sense of achievement when I look out and flowers are blooming and the place is looking lovely. It's all about the look of it really!  
(Female, 55+, Cork)

**65%** of gardeners say gardening is important to make their house look good





**16%** of adults have limited or no gardening space

**BUT.....**

Over **60%** of these are Interested in growing





# Creative Solutions to small problems

## What do Gardeners with limited space do



**64%**

find room for decorative flowers



**59%**

grow in baskets & window boxes



**42%**

Grow herbs



**35%**

Grow Vegetables





## Growth Zones for Charm:



Effortless aesthetic



Striking Style



Compact ecology



**Growers**

Easy Grow Solutions!

Surprising Irish colours and sub-branding

Ready to go planted solutions



**Retail**

Showcase easy options; floral, Hardscaping and GYO.

Showcasing the spectacular. Centrepiece attractions.

Solutions for compact spaces.





*Right Thing, right there: Foodora Australia: the rise of The drone culture.*

Effortless aesthetic

Why not reach people in new ways to make it easy for them?

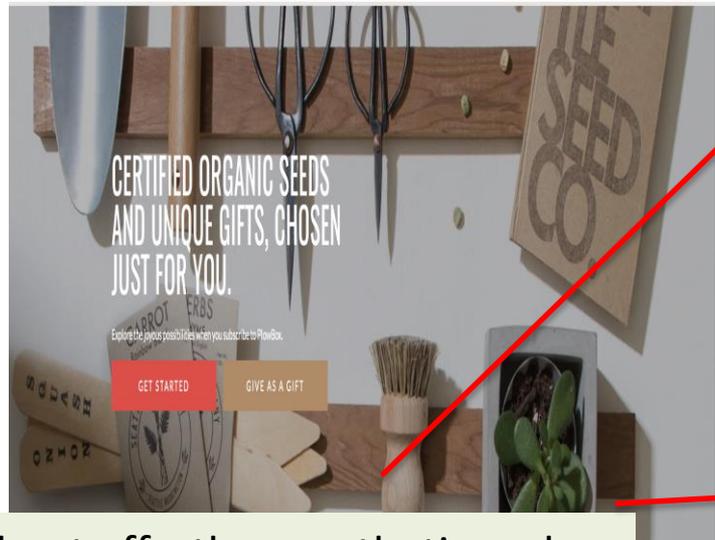




# PLOWBOX™

from SEATTLE SEED CO.

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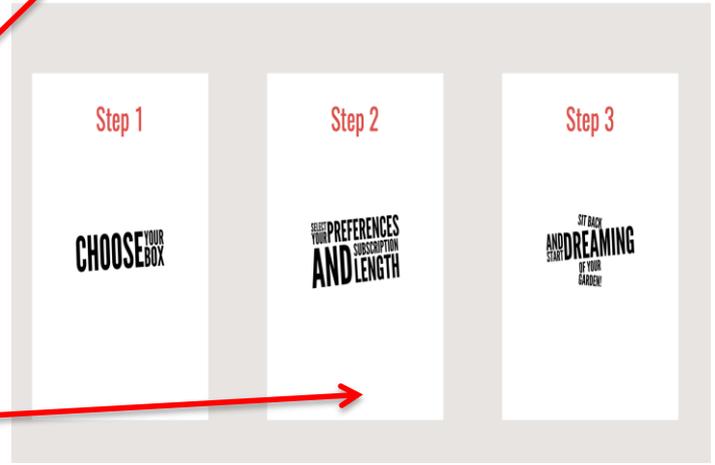
## How It Works

### PlowBox:

Choose from one box or 4 boxes delivered throughout the year (one for each season.) Boxes get even more affordable if you subscribe to a whole year (Spring, Summer, Fall, Winter) Shipping is FREE in the USA.

### PlowBox Green:

This is our monthly microgreens subscription for those who only want to grow microgreens indoors.



Plow box looks at effortless aesthetic and compact ecology





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“CHOICE”





## "CHOICE" GROWTH ZONES



### **Provenance:**

Desire for local stock as assumption that much is local



### **Inspiring growth:**

Through online education and store promotion/display



### **Perennial Prudence:**

Ongoing desire for value

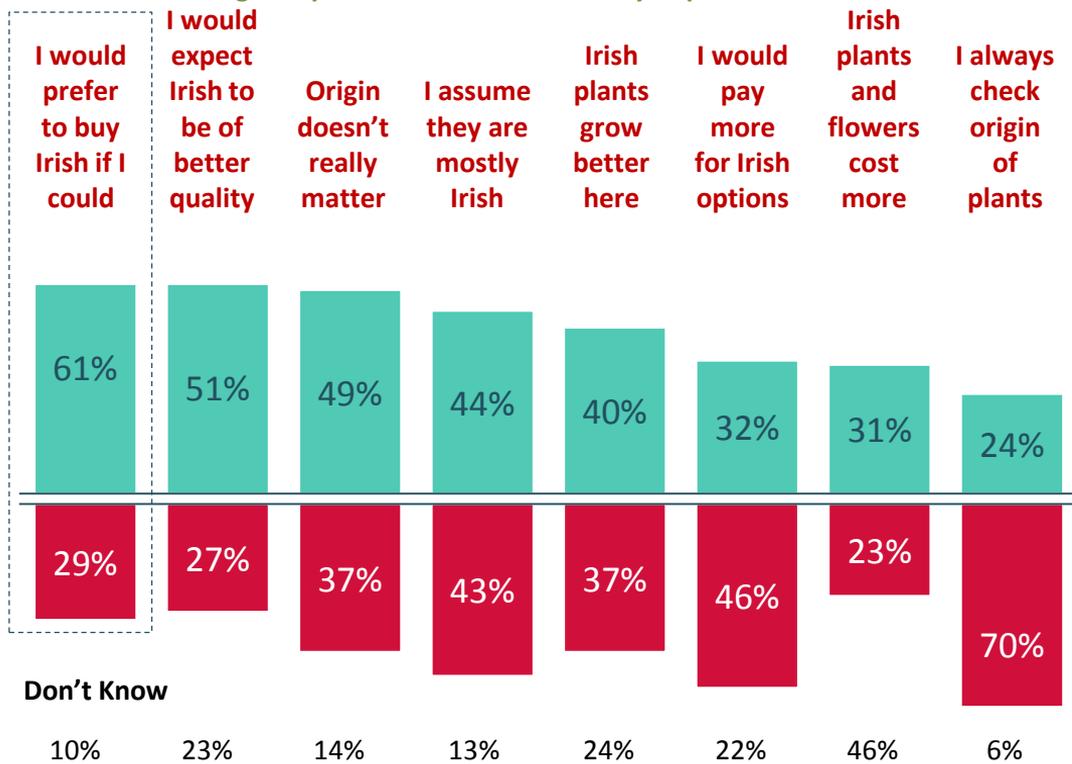


# Attitudes to Sourcing

(All Regular Plant Buyers and Gardeners – n = 902)



When it comes to the origin of plants and flowers..... Can you please choose the extent to which each of these applies to you personally



*While there is an appreciation of Irishness, we need to develop a message to promote the benefits to gardeners....*

*Better growth, better quality.*

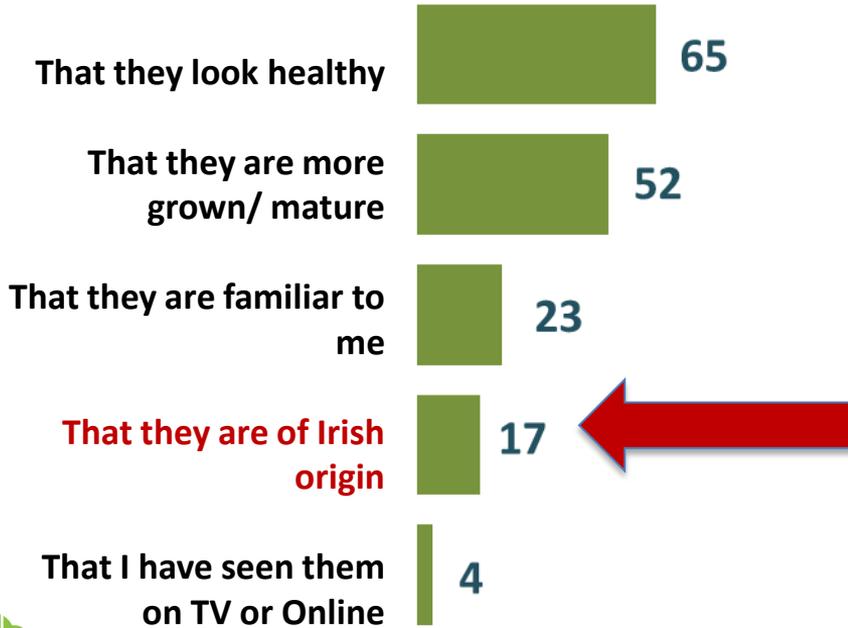




# Premium Options

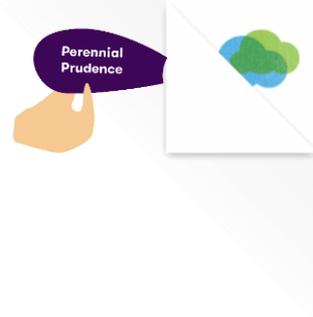
(All Regular Plant Buyers and Gardeners – n = 902)

When it comes to buying plants and flowers, you sometimes pay more for certain features. Which of these do you think are worth paying a little more for, if any?



Well I assumed most things were Irish but never really thought about it. The main thing is that it grows well in my garden and if it's Irish then that's a bonus (Female, over 50 Cork)





Discounters such as **Lidl and Aldi** growing in popularity for indoor and outdoor plants, flowers and herbs

**Over a half** believe they are **great value** for money.

**1 in 3** buy materials and plants there on **impulse**





For **57%** of  
gardeners  
**cost**  
is the second biggest  
**barrier** to gardening  
more,  
after the weather





I use my eyes for inspiration to be honest  
but when I need further information or  
advice I would google the particular flower  
or plant  
(Female, over 50, Dublin)



# Online as a source of information and inspiration is becoming more prevalent amongst Gardeners



# Inspiration: Best Sources: Top Three



Friends and family



What I see in garden centres  
and stores



Gardening programmes  
on TV





## Growth Zones for Choice:

### Provenance



### Inspiring Growth



### Perennial Prudence



### Growers

Packaging and Labelling callout; exclusivity, advantages and benefits.

Multibuy solution for volume, experimentation and value.

Consider emerging discounter channel. Co-promotion? Online channel direct?



### Retail

Partner with growers to develop “Irish” gardens to inspire.

Provide specialist advice and support, easy navigation with strong display and cross-promotion of stock.

More than just value: building advisory, quality, loyalty, promotion and pricing elements





**Reconnect people with nature like the farm to table initiative in South Africa: allow people become “growers for a day”**



**Genuine Provenance:  
Celebrate provenance and educate : Queen Victoria Green House Project in Melbourne**





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“HARMONY”





## "HARMONY" GROWTH ZONES



### **Natural Wellness:**

Physical and mental wellbeing: gardening facilitating time out and reconnecting with nature



### **Harmonious Blooms:**

Environmental conscientiousness



### **Productive Planting:**

The growth of "gyo" and beyond traditional locations





**For Gardeners, their time spent in  
the garden is a “zen-like”  
experience.**

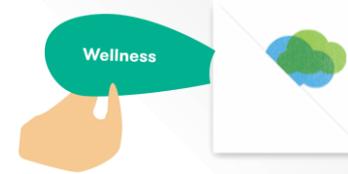
When I'm out there it's very relaxing and  
therapeutic. I go into my own world  
(Male, over 40, Dublin)



**75%** of adults believe that gardening is good for your **mental health....**

**98%** of adults who garden regularly know that it is





**80%** of adults feel their garden or outdoor space is a haven for **relaxing and unwinding....**



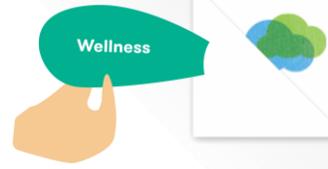
**96%** of regular gardeners view it as such....





**63%** of adults feel that  
it is good for staying  
**fit and active**





...and despite **3 in 4**  
regular gardeners  
considering  
**digging a "pain"**,

**95%** credit gardening  
with keeping  
them fit and active.





# Growing awareness of the environmental effect of Gardening

Harmonious  
Blooms



GYO options driving diversity, sensitivity and chemical avoidance



About **300,000** adults in  
Ireland **grow vegetables**  
**regularly** at home

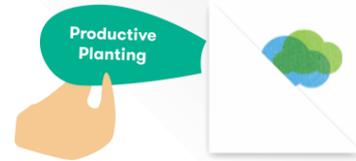




Over **4 in 10** adults **express an interest** in GYO.... That's a whopping **1.4 million** people.

Interest peaks at **35-44 years** old.





One out of every three regular gardeners have a **vegetable patch** set aside.





About **964,267** regular gardeners in Ireland sow or plant **herbs in their garden.**





# Growth Zones for Harmony:



## Natural Wellness

## Harmonious Blooms

## Productive Planting



Consideration for plants that  
“enhance wellness”

Highlight the low impact nature  
of local options; carbon, native  
etc

Focus on options that will  
succeed and thrive in Ireland.  
Highlight benefits of Irish.

Creating instore gardening  
“wellness zone”  
Partnerships with wellness  
groups

Providing solutions and advice  
on eco options; rainwater  
harvest, compost, low/no  
chemical, organics etc

Promote and educate about  
local growing groups and  
how/where to learn. Find  
Ambassadors



### Growers



### Retail





**Health & wellbeing**  
Consumer Lifestyle Trends



**Natural Wellness**

"I want to achieve a holistic approach to physical health and emotional wellbeing"



**Pursuit of Happiness: Serotonin Eatery**



**Strength in numbers**



**Create environments that can be used  
For mental wellness**





Productive Planting



Local action



Bertrams Inner city Farm SA



Granby Park Dublin

Create environments that can educate and even provide employment





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**Some Big Plays....**



# CHANNELS



## Embrace Digital

- Develop Online Inspiration & Education hub
- Explore online sales channel; the future?



## Relevant Inspiration

- Concentrate on new emerging areas:  
Compact Gardening, Low/No Maintenance and GYO



## Support the Movement

- Focus on recruitment of the gardener of the future.
- Simplify proposition and ease understanding and navigation



## Add Value

- Build loyalty through advice, expertise and staff in an increasingly cost-competitive context.
- Promote confidence in exploration and trial.





### Grow Local

- Explore localized planting solutions; decorative and GYO
- Highlight Irish credentials and benefits



### Listen to Trends

- Consider range in context of emerging trends
- Partner with retail channels to provide responsive solutions



### Go Direct?

- Examine direct to market options for value and margins
- Digital opportunity may help



### Build Advantage

- Highlight benefits, environmental, quality and success-of local growers.
- Specialise for value delivery in highly competitive context?



A wide-angle photograph of a dirt path winding through a vast, green field of tall grasses or crops. The sun is low on the horizon, creating a warm, golden glow across the scene. The sky is a mix of orange, yellow, and dark grey, suggesting a sunset or sunrise. The path leads from the foreground into the distance, where a few trees are visible on the horizon.

Thank You



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# Thank You



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