

## Garden Products Retailing - UK - June 2016

Report Price: £1750.00 | \$2834.04 | €2223.04

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“Competition in garden retailing is intensifying as merger and acquisition activity is reshaping the specialist and DIY sectors, creating large multiple chains in an industry which as recently as 10 years ago was dominated by independent companies and small chains.”

— Jane Westgarth, Senior Market Analyst

### This report looks at the following areas:

- How can garden retailers embrace the trend to treat the garden as a room?
- How can garden centres encourage people to visit more frequently?
- As smartphone ownership grows, how can garden retailers deliver suitable digital content to engage shoppers?

The nature of specialist retailing is also changing with major garden specialists developing a broader offer in restaurants, clothing and housewares to attract customers year round. As well as generating extra revenues, these developments reduce specialists' dependence on seasonal garden ranges. Meanwhile non-specialists are adding to their garden ranges, ambitious for a share of consumer spending.

Garden retailing has been through a period of wide-ranging change and competition is intensifying. Wyevale, which has been growing through acquisition, tabled a bid for Tesco-owned Dobbies in April 2016, which at the time of writing is not finalised. The combined group would have 189 outlets, far larger than the next largest specialist, Klondyke which has 24 outlets. Garden specialists are continuing to evolve into destination stores for all seasons, developing restaurants and adding a broader range of merchandise including clothing, homewares and pet shops. This reduces their dependence on seasonal sales and the volatility of sales created by cold or wet weather over the key gardening seasons. The specialists are beginning to play catch-up with the rest of retailing and are developing online selling, adding new services such as click-and-collect and expanding their online choices. Online shopping is an important factor in the suite of services which consumers will expect.

Meanwhile in the DIY sector B&Q, the leading garden retailer in the UK, faces new direct challenges from Bunnings, which has bought Homebase and will change the group's positioning and identity with greater focus on everyday great value. Elsewhere a broad range of other retailers are stepping up their efforts to serve the growing market for outdoor living. While Argos (recently purchased by Sainsbury's) has been a market leader in durable garden goods, it faces stiff competition from the home sector, notably IKEA, Next, Dunelm, Wilko (Wilkinson) and the Range. The grocery multiples continue to serve a convenience role, carrying garden and outdoor living ranges in season, plus Waitrose is developing its Waitrose Garden offer, both online and at its stores.

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## Table of Contents

### Overview

What you need to know  
Products covered in this Report

### Executive Summary

The market

**Steady growth forecast until 2021**  
Figure 1: Consumer spending on garden products, 2011-21

**Market segmentation**  
Figure 2: Garden market segmentation, broad segments, 2015(est)

**22.8 million UK gardens**

**36% say gardening is a favourite pastime**  
Figure 3: Attitudes towards time at home, 'Gardening is my favourite pastime', by age, socio-economic group and tenure, November 2015

**Volatility of demand affected by rainy days**  
Figure 4: UK average rainfall, mm, by month, 2013-15

**1.9 million more over-55s by 2020**  
Figure 5: Trends in the age structure of the UK population aged 15+, 2010-20

**Companies and brands**

**Significant changes concentrating garden retailing**

Homebase taken over by Bunnings

Supermarkets increase garden ranges

Plenty of retailers address outdoor living

**Online retailing continues to develop**  
Figure 6: Distribution of garden products, by type of retailer, 2015 (est)

**The consumer**

**88% of UK households have a garden, outside space or allotment**  
Figure 7: Presence of gardens and allotments, April 2016

**83% personally maintain their garden**

**Gardening can be a shared activity**  
Figure 8: Maintenance of gardens and allotments, others maintain, April 2016

**47% of gardeners garden once a week**  
Figure 9: Frequency of gardening, April 2016

**Confident gardeners are wealthier**  
Figure 10: Confidence when gardening, April 2016

**45% of people with gardens bought from B&Q**  
Figure 11: Retailers used in the last 12 months for garden purchases, April 2016

**Staff knowledge and inspiring displays are the biggest influence on choice of where to shop**  
Figure 12: Characteristics influencing choice of retailer for garden products, April 2016

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81% agree their garden is a good place to relax

Figure 13: Attitudes towards the garden or outside space, April 2016

Three target groups for garden retailers

Figure 14: Target groups for the garden, April 2016

Garden as a Pleasant Pastime (50%)

Garden as a Practical Environment (26%)

Garden as Another Room (24%)

What we think

## Issues and Insights

How can garden retailers embrace the trend to treat the garden as a room?

The facts

The implications

How can garden centres encourage people to visit more frequently?

The facts

The implications

As smartphone ownership grows, how can garden retailers deliver suitable digital content to engage shoppers?

The facts

The implications

## The Market – What You Need to Know

Steady growth predicted for garden sales

Diverse market with many elements

Important to reduce reliance on seasonal markets

Intense competition

1.9 million more over-55s by 2020

## Market Size and Forecast

Market to grow by 12.7% between 2016 and 2021

Figure 15: Consumer spend on garden products, 2011-21

Figure 16: Consumer spend on garden products, at current and constant prices, 2011-21

Forecast methodology

## Market Segmentation

Figure 17: Garden market segmentation, broad segments, 2015 (est)

Reducing dependence on spring season

Trend to outdoor living

Demand for garden chemicals depends on prevailing conditions

Emerging trend for cordless and robot mowers

Garden building more stylish

Popularity of wild bird seed

Figure 18: Consumer spending on garden products, by market segment, 2011-16

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## Channels to Market

New competitive pressures

Figure 19: Distribution of garden products, by type of retailer, 2015 (est)

## Market Drivers

Seasonal planting

Barbecue culture

Garden chemicals

Cordless and robot mowers

Stylish garden buildings add useful living space at cheaper cost than an extension

Wild birds

Figure 20: The garden market, by segment, 2015 (est)

Ownership of gardens

Figure 21: Type of garden, April 2014

Gardening as a favourite pastime

Figure 22: Attitudes towards time at home, 'Gardening is my favourite pastime', by age, socio-economic group and tenure, November 2015

Around 1 million allotments in the UK

61% say their garden is a good place for GYO

Revamping the front garden

Rainy days

Figure 23: UK average rainfall, mm, by month, 2013-15

1.9 million more over-55s by 2020

Figure 24: Trends in the age structure of the UK population, 2010-20

## Key Players – What You Need to Know

Wyevale and Dobbies combined will be a sector giant

Wyevale has been building profits

Garden centre outlet numbers

Trading online

Importance of in-store restaurants and cafés

Concession sales are building

Innovation in gardening

Investment in stores

## Companies and Brands

Garden centre turnover

Figure 25: Garden centre operators, turnover (excl VAT), 2010-15

Profitability of garden centres

Figure 26: Garden centre operators, operating profits, 2010-15

Garden centre outlet numbers

Figure 27: Garden centre operators, outlet numbers, 2012-16

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## Garden centre turnover per outlet

Figure 28: Garden centre operators, sales per outlet, 2011-15

## Trading online

Figure 29: Garden centre operators, online activity, 2016

## Importance of in-store restaurants and cafés

Figure 30: Garden centre operators, catering summary, 2016

## Expanding the product mix

Figure 31: Examples of concessions featured at garden centres, 2016

## Competitive Strategies

Major takeovers will affect competition

Wyevale's takeover of Dobbies creates a huge garden chain

Bunnings (Wesfarmers) buys Homebase shaking up the DIY sector

B&Q awarded for sustainable retailing

Convenient shopping at grocery stores

Asda addresses affordable style

C-stores carry bedding plants at the door

Value grocers carry seasonal ranges

Waitrose Garden in 260 supermarkets

Retailers eager to embrace outdoor living

John Lewis focuses on outdoor living

Next Home & Garden now 10 stores

IKEA captures the essence of outdoor living for tiny gardens

Dunelm focuses on garden and conservatory furniture

Rise of the value retailers

Tiger – Budget stylish fun

Poundland launches new garden range

The Range carries a wide range of garden products

Online retailing of gardening products is growing

Concessions taking up more space at garden centres

Digital activity

Loyalty schemes

Linking with celebrities and other trusted brands

## Launch Activity and Innovation

Control your garden with a smartphone

Figure 32: The LG Smart Garden, May 2016

A plant that charges your phone

Figure 33: Bioo phone charger, May 2016

Waitrose re-invents soil

Figure 34: Waitrose, Kado plant, May 2016

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Plants targeting smaller spaces  
Click & Collect  
Drive-in collection point  
Biodegradable pots that add to point-of-sale impact  
Gas power for fire pits  
Figure 35: Solus Decor fire table, May 2016  
Garden centre refurbishments  
Café and restaurant additions

## Space Allocation Summary

Garden centres space allocation overview  
Figure 36: Dobbies, Reading, Wildlife Garden display, May 2016  
Figure 37: Garden centres estimated outdoor space allocation, May 2016  
One-stop shopping destinations  
Experiential customer experiences  
Figure 38: Wyevalle, Hillingdon, Buzzing Bakery, May 2016  
Figure 39: Garden centres estimated indoor space allocation, May 2016  
Concessions and trading partners  
Figure 40: Garden centres Estimated concession/trading partners split by percentage of total selling space, May 2016  
DIY retailers space allocation overview  
Figure 41: DIY retailers estimated outdoor garden space allocation, May 2016  
Figure 42: DIY retailers estimated indoor garden space allocation, May 2016  
Figure 43: DIY retailers estimated non-garden – Garden space allocation split, May 2016  
Figure 44: DIY retailers estimated outdoor – Indoor garden space allocation split, May 2016  
Detailed space allocation  
Figure 45: Garden products retailers detailed space allocation as a percentage of total floor space estimates, May 2015

## Advertising and Marketing Activity

£40.6 million advertising in 2015  
Figure 46: Total above-the line, online display and direct mail advertising expenditure on garden products retailing, 2012-15  
B&Q is the largest advertiser  
Figure 47: Total above-the line, online display and direct mail advertising expenditure on garden products retailing, shares, 2015  
Large retailers boosting spend  
Figure 48: Garden retailer advertising, 2012-15  
Campaign specifics  
Wyevalle uses scrapbook images  
Figure 49: Wyevalle, garden advertising, 2015  
Dobbies features 'your patch'  
Figure 50: Dobbies' garden advert, Spring 2015  
Figure 51: Dobbies' Christmas advert 2015  
Television and press dominate media

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Figure 52: Above-the line, online display and direct mail advertising expenditure on garden products retailing, by media type, 2015

Embracing social media

Nielsen Media Research coverage

## The Consumer – What You Need to Know

88% of UK households have a garden, outside space or allotment

83% of those with an outside space are gardeners

14% of gardeners are 'extremely confident'

B&Q used by 45% of people with gardens, allotments or an outside space

Knowledgeable staff and displays that give ideas are the most influential factors

People have very positive feelings about gardens and gardening

Three key target groups for the garden

## Presence of Gardens and Allotments

Village and suburban homes most likely to have a garden

12% of UK homes do not have an outside space

Private renters least likely to have an outside space

Figure 53: Presence of gardens and allotments, April 2016

## Maintenance of Gardens and Allotments

83% of those with an outside space are gardeners

Figure 54: Maintenance of gardens and allotments, personally maintain, April 2016

Engagement with garden services

Gardening is a sociable pastime

Figure 55: Maintenance of gardens and allotments, others maintain, April 2016

47% of gardeners participate at least once a week in summer

Figure 56: Frequency of gardening, April 2016

Over-55s garden most regularly

## Confidence when Gardening

14% of gardeners feel extremely confident

Figure 57: Confidence when gardening, April 2016

Confident and fairly confident gardeners participate most regularly

Figure 58: Frequency of maintaining the garden, by confidence when gardening, April 2016

## Where They Buy Things for the Garden

76% of those with gardens purchased in the last year

Figure 59: Repertoire of retailers used in the last 12 months for garden purchases, April 2016

B&Q is the most used retailer for garden products

Homebase has weakest coverage in the north of England

Value retailers falling short in London

Village/rural shoppers go to garden centres

Wealthiest shoppers use B&Q and the big garden centres

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Internet used by 10% of those with gardens or an outside space

Figure 60: Retailers used in the last 12 months for garden purchases, April 2016

Confidence affects choice of retailers

Figure 61: Retailers used in the last 12 months for garden purchases, by gardening confidence, April 2016

Rare gardeners go to B&Q

Figure 62: Retailers used in the last 12 months for garden purchases, by frequency of gardening, April 2016

## Characteristics that Influence Choice of Retailer

Staff knowledge is the most influential factor in where to shop

Inspirational displays influence 40%

Attracting families

Cafés are important to 23%

25-44s value an informative website

Other departments increase reasons to visit

Figure 63: Characteristics influencing choice of retailer for garden products, April 2016

## Attitudes towards the Garden

Figure 64: Attitudes towards the garden or outside space, April 2016

Three main target groups

Figure 65: Target groups for the garden, April 2016

Target groups – Key characteristics

Garden as a Pleasant Pastime (50%)

Garden as a Practical Environment (26%)

Garden as Another Room (24%)

Figure 66: Gardening confidence, by target groups, April 2016

Where the target groups shopped

Figure 67: Retailers used for garden purchases, by target groups, April 2016

Figure 68: Attitudes towards the garden, by target groups, April 2016

Figure 69: Target groups for the garden, by confidence, April 2016

Figure 70: Retailers used in the last 12 months for garden purchases, by target groups, April 2016

Figure 71: Characteristics influencing choice of retailer for garden products, by target groups, April 2016

## Appendix – Data Sources, Abbreviations and Supporting Information

Abbreviations

Consumer research methodology

## Appendix – Market Size and Forecast

Data sources

Market sizing and segment performance

Forecast methodology

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