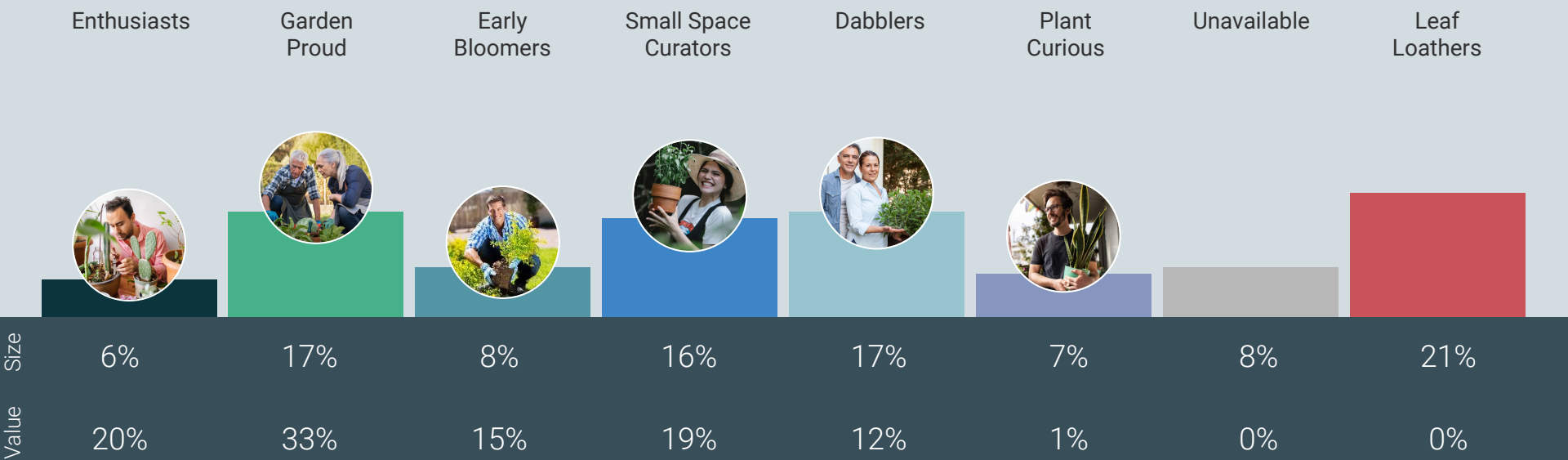


Consumer Usage & Attitude Research

Segment Summaries

16 June 2021
Project #: NY20002 Nursery Fund Consumer Usage and Attitudes Research

Segment size (% of Australian adults) and value (% of consumer expenditure in category)







James, 45

Segment Size	6% of Adults
Segment Value	\$269M per annum

Status	Family with teenage kids
Work	Full-time, HHI \$120K
Dwelling	House that he owns with the bank that has a front & back yard in the suburbs
Traits	Plant lover, highly involved, environmentally conscious

Interest	
Confidence	

"What's not to love about getting your hands dirty in the garden? It is so rewarding to watch the garden flourish."

Bio

James loves plants. He loves the aesthetic value that they add to his home and garden as well as the physical benefits he derives from gardening. For him, gardening is more than just a hobby, it is a way of life.

James has been working on his garden for a number years now and is proud of what he has achieved. His love of plants extends into his home, where he has tried to bring some green into most rooms.

To fill the large beds, ensure impactful colour in his pots and keep the veggie garden seasonal, James is constantly planting seeds and propagating or buying new plants.

He is accomplished enough to experiment, to tackle DIY projects and give advice. He's always up for a trip to the nursery to get exactly what he needs.

Generally on the weekend James will buy plants from a local nursery not far from his home. Sometimes he will also buy from bigger hardware stores when making a trip to pick up things for his latest DIY project.

Indoor plants bought last year	10
Outdoor plants bought last year	20

Motivators

Intrinsic pleasure - gardening is both a peaceful and physical activity.

Natural beauty - being close to nature, being outdoors and aesthetic appeal.

People - Enthusiast's gardens are part of their legacy. They also like giving plants as gifts to family and friends.

Sustainability - Enthusiasts see gardening as contributing to the environment, grown their own produce and allowing them to compost organic household waste

Barriers

There are few barriers to buying more plants other than having enough space to accommodate new and interesting additions.

How to engage

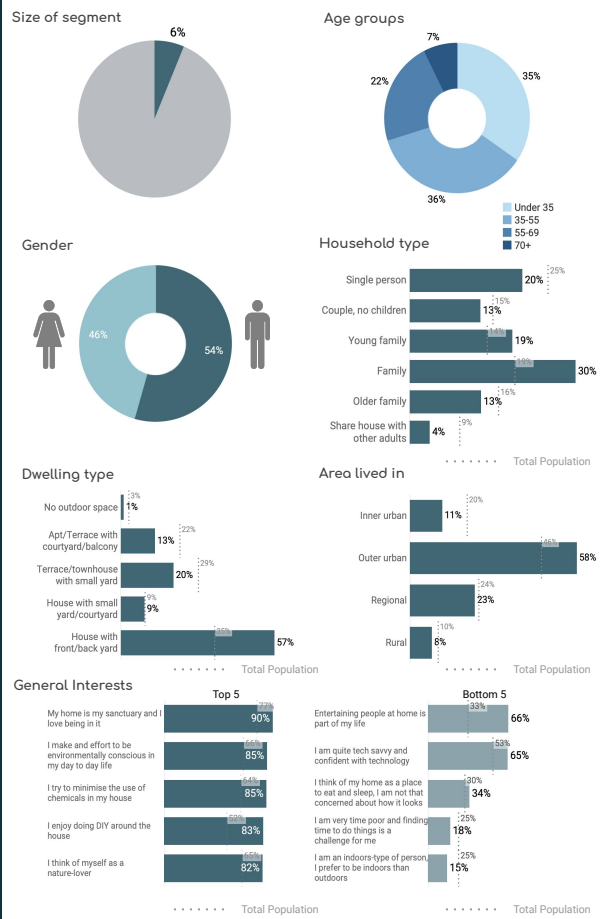
Feed their passion - Always eager to expand their collection and buy new and interesting plants.

Inspire - provide ideas for garden or DIY projects that will trigger new plant purchases.

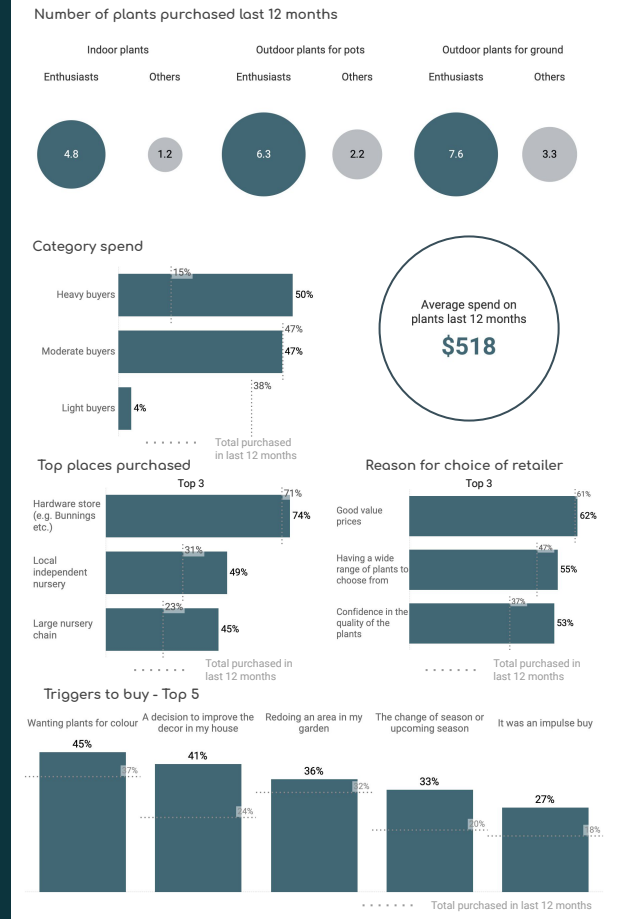
Gifting - They love to share their love of plants. Provide fresh gift ideas that allow them to express their passion to others.

ENTHUSIASTS

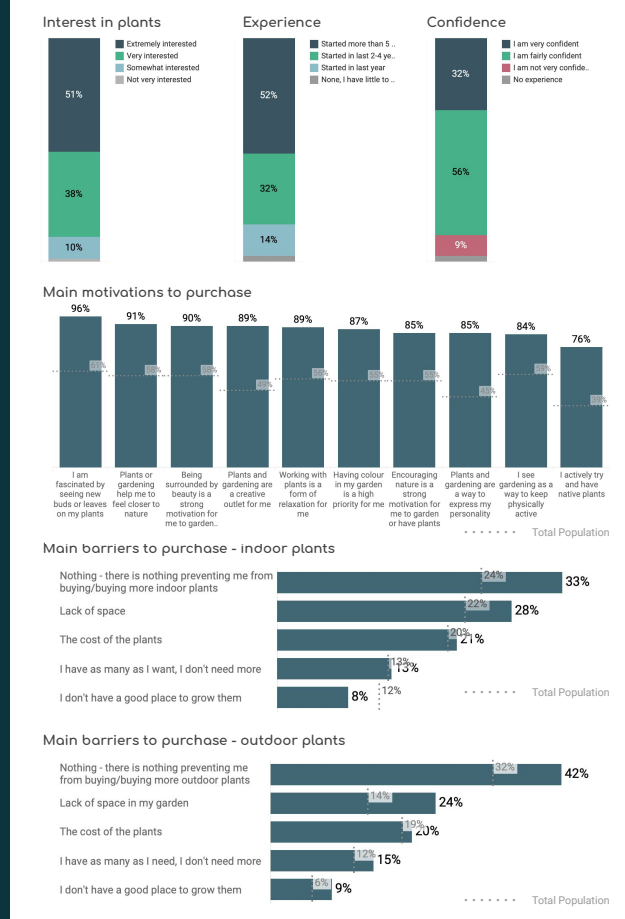
Demographics



Buying behaviour



Attitude to plants and gardening







Anne, 67

Segment Size	17% of Adults
Segment Value	\$451M per annum

Status	Couple, older children no longer living at home
Work	Retired, HHI \$45K
Dwelling	Fully own their house with front/back yard a regional city
Trait	Active outdoors, DIY/Project focus, environmentally conscious

Interest	
Confidence	

"We spend most of our time outdoors in the garden, often deciding what our next project will be!"

Bio

Anne and her husband both love to keep busy with DIY and craft projects, but their true passion is gardening. Having a beautiful home starts with having a beautiful garden.

Since they retired, they have been able to focus more of their time and energy on their veggie garden and put their extra space to good use. While they have a few indoor plants, their gardening passion is firmly rooted in the outdoors.

Anne plans her garden carefully, making sure to plant correctly for the soil conditions, the new season and for visual impact. She's also careful to avoid plants that could harm her dogs.

She knows she spends more than she probably should on plants at both the hardware store and the local nursery, but being outside keeps them fit and happy. Besides, they're not planning on moving anytime soon, so it's not going to waste.

Anne also propagates her own plants and swaps with neighbours to add to her collection. In fact, people often ask for advice and Anne's more than happy to share her knowledge and love of plants with them.

Indoor plants bought last year	1
Outdoor plants bought last year	19

Motivators

Pride - The garden is a public statement of their achievement, expertise and care.

Beauty - seeing their garden grow, flower and produce is a source of joy for them.

Health - gardening is relaxing but also a source of physical activity.

Creativity - gardening and DIY projects keep this group inspired.

Fresh produce - Garden Proud delight in putting food on their table and that of their family and friends.

Barriers

Generally few barriers to buying more outdoor plants, but indoor plants are really part of their home decor.

Cost - good value prices and good quality of plant are important factors.

Capacity - there are few areas of the garden that are yet to be utilised and Garden Proud are capable of producing new plants from cuttings.

How to engage

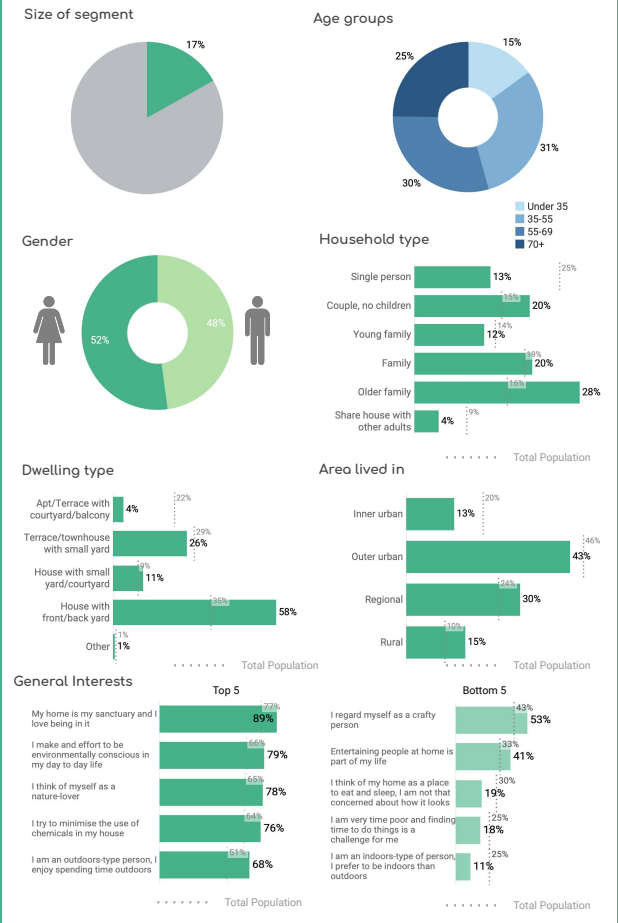
Inspire - provide the spark that ignites the next garden or outdoor DIY project, or inspires a complete makeover of a section.

Newness - intrigue Garden Proud with new colourful plants or edible varieties that they can add to their veggie patch.

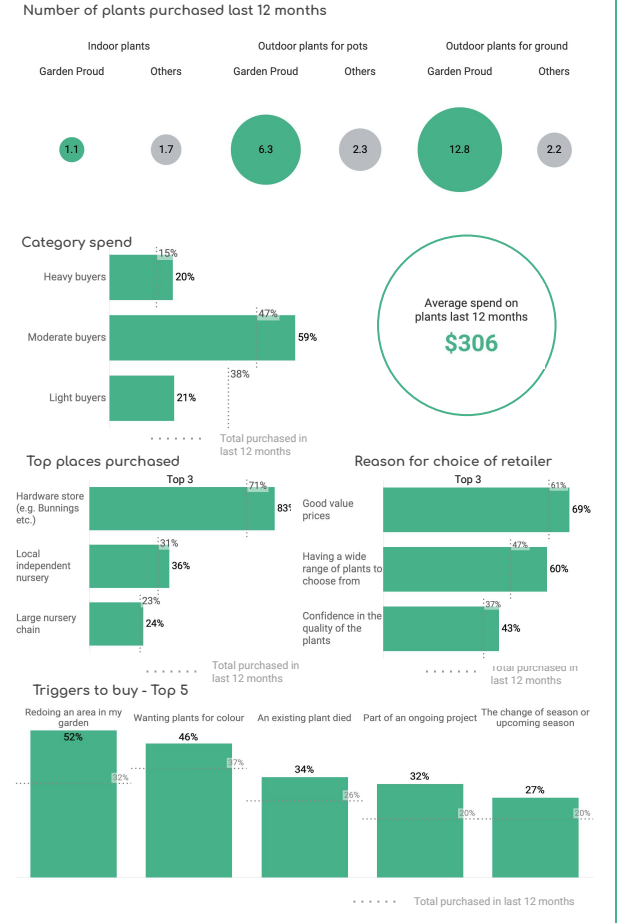
Tips & hints - Always open to learning and is practical so show them how to do things easier or better.

GARDEN PROUD

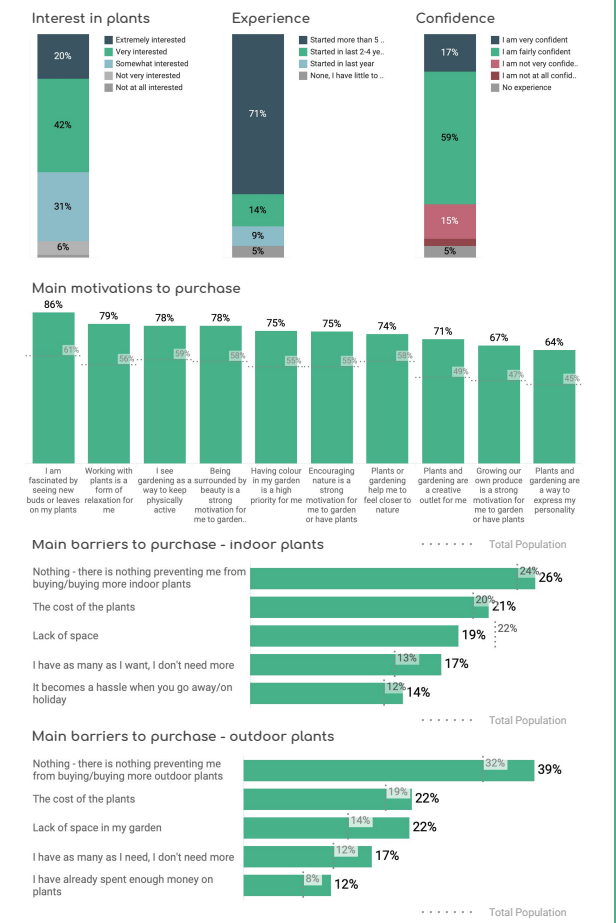
Demographics



Buying behaviour



Attitude to plants and gardening





"I like looking after my plants and I like my home to feel leafy and natural. It's good to have a little bit of nature indoors to green up my space."

Bio

Paul lives with his partner in a townhouse with modest space for his growing interest in plants. He's built up a small collection of indoor plants, but is really trying to make his courtyard leafy, cool and natural oasis to spend time in. He's also nurturing a herb garden so that he's got fresh herbs on hand for when he and his partner cook.

Most of his plant shopping happens over the weekend at markets or at the hardware store where he is exposed to a wide variety at a good price. He's usually looking for something a little different or that he just likes the look of - even if it's the pot that he falls for.

Paul doesn't only shop for himself, he knows that plants make a great gift.

His interest in plants was inherited from his mum who is the real green thumb in the family. He's learnt quite a bit from her over the years and although fairly confident, is still keen to know more.

He's pretty handy with small DIY projects and is on the lookout for ways to improve his home.

Indoor plants bought last year 4

Outdoor plants bought last year 15

Motivators

Intrinsic pleasure - plants are a source of pride and are a connection with nature.

Plants for people - while still learning about plants and gardening the Early bloomers are keen to learn from others. Plants also make a nice gift for friends and family.

Barriers

Knowledge - especially learning more about outdoor plants.

Cost - good value prices and quality of plant are important factors.

Fear of failure - although confident, there is still some fear of not being able to keep plants alive. Particularly the expensive ones.

Engage with me

Catch their eye - Attracted by the look of both plants and their pots.

Gifting solution - make it easy to choose an appealing, budget-friendly gift.

Educate - make it easy to learn more, especially about outdoor gardening.

Simplify - low maintenance solutions that allow time away from home without worrying about which plants will survive.

Segment Size 8% of Adults

Segment Value \$205M per annum

Status Couple with no children

Work Full time, HH1 \$150K

Dwelling An urban townhouse with small front and back courtyard

Traits Interested, future potential

Interest

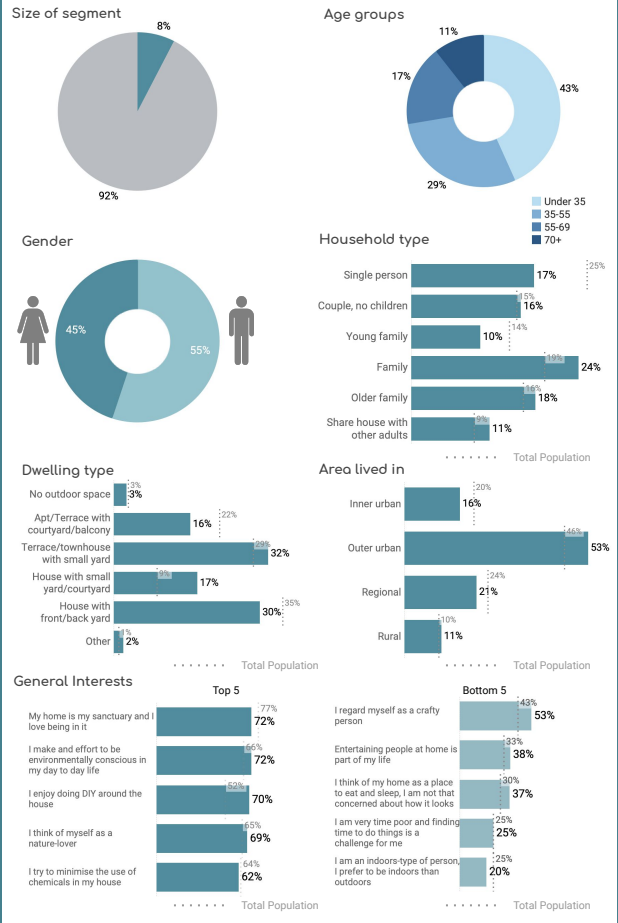


Confidence

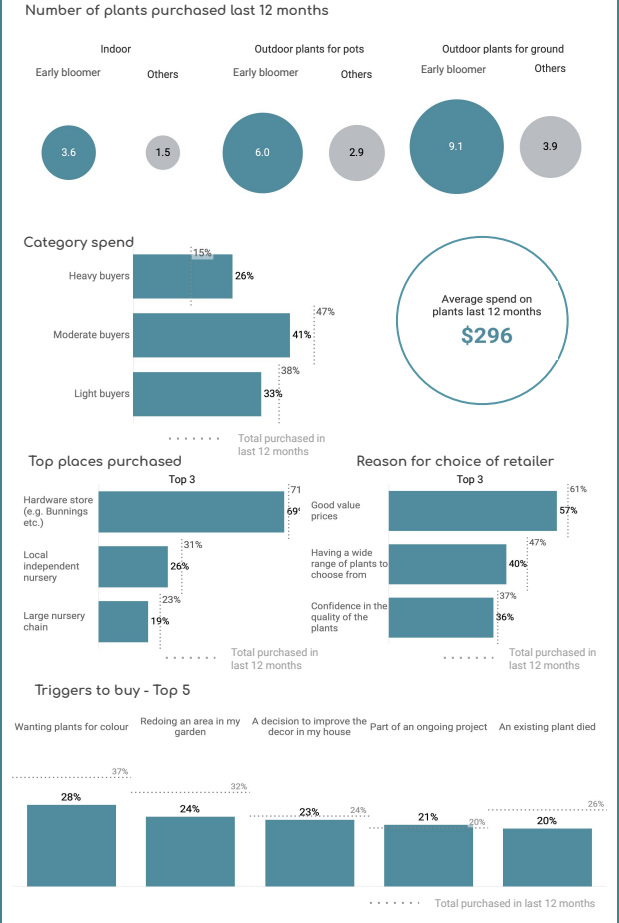


EARLY BLOOMERS

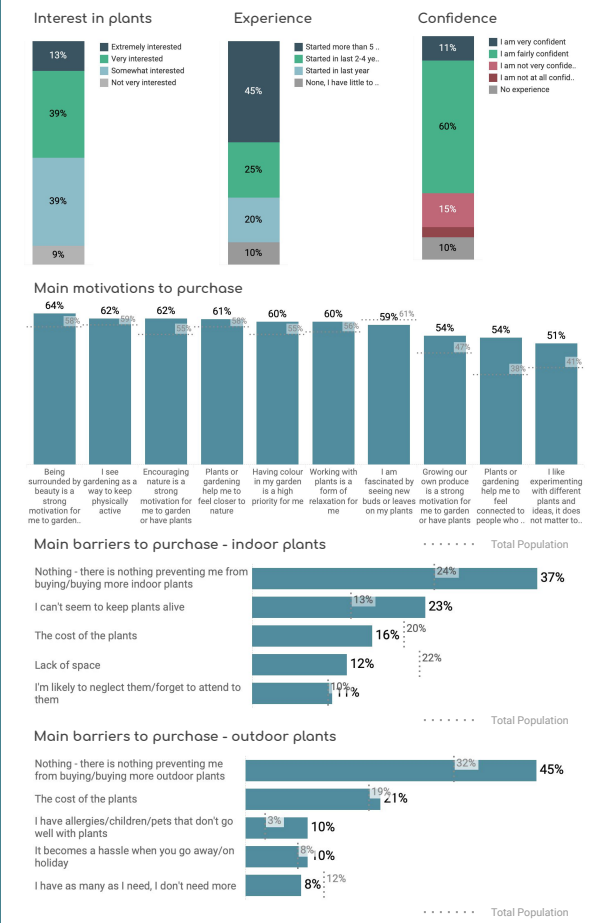
Demographics

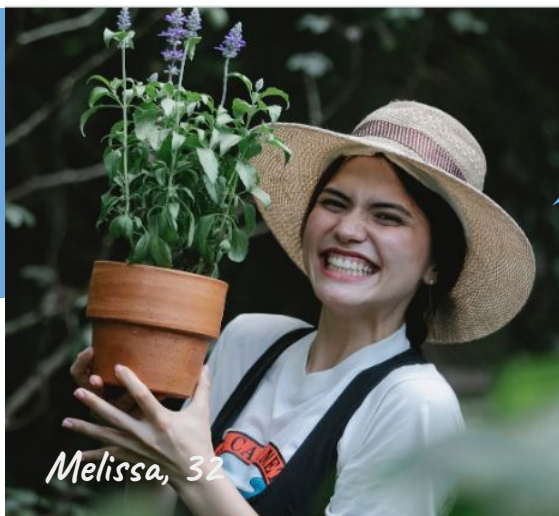


Buying behaviour



Attitude to plants and gardening





Segment Size 16% of Adults


Segment Value \$261M per annum


Status Married with a young family

Work Part-time, HHI \$110K

Dwelling Rented, urban, terraced apartment

Traits Aesthetically driven, space constrained, environmentally conscious

Interest 

Confidence 

"I love making my home beautiful. I just wish I had more space, time and money to do it with!"

Bio

Mel, her husband and their busy 4 year old recently moved to a rented terrace with a courtyard. Now for the job of decorating their new place! Plants are Mel's go-to for bringing colour and creativity into her space quickly and without blowing the budget. She's seen a few ideas on instagram that she's keen to try.

Mel keeps her eyes open when she's at Bunnings or her local grocer, just in case there's something 'just right' to add to her trolley.

With the limited space, potted plants work best for her both indoors and outdoors. They are also fairly low maintenance without needing much in the way of tools or storage. And if needed, she gets someone in to help with the big stuff. She's currently experimenting with some herbs in a sunny spot that she planted up with her daughter. It'll be nice to have them to cook with (her other creative outlet), but also nice to see them grow.

Although Mel seems like a competent gardener to her friends, she sometimes wishes you knew a bit more when it comes to plants.

Indoor plants bought last year 2

Outdoor plants bought last year 4

Motivators

Relaxation - time in the courtyard with her plants is like taking a deep breath after a busy day.

Creativity & expression - through colour, texture and variety of plants, Mel gets to experiment with her own style.

Nature - plants allow nature into the house and provide a way of sharing her love of outdoor activities with her daughter.

Feel good - improving their home is important to her and Mel gets a kick from a compliment.

Barriers

Space - there simply is no more space to put more plants.

Time & other priorities - children, work, home, friends... it's hard to find time for gardening.

Knowledge - Mel wants to learn more and feels her knowledge of outdoor plants especially is lacking.

Budget - price and quality are important to justify the spend.

Engage with me

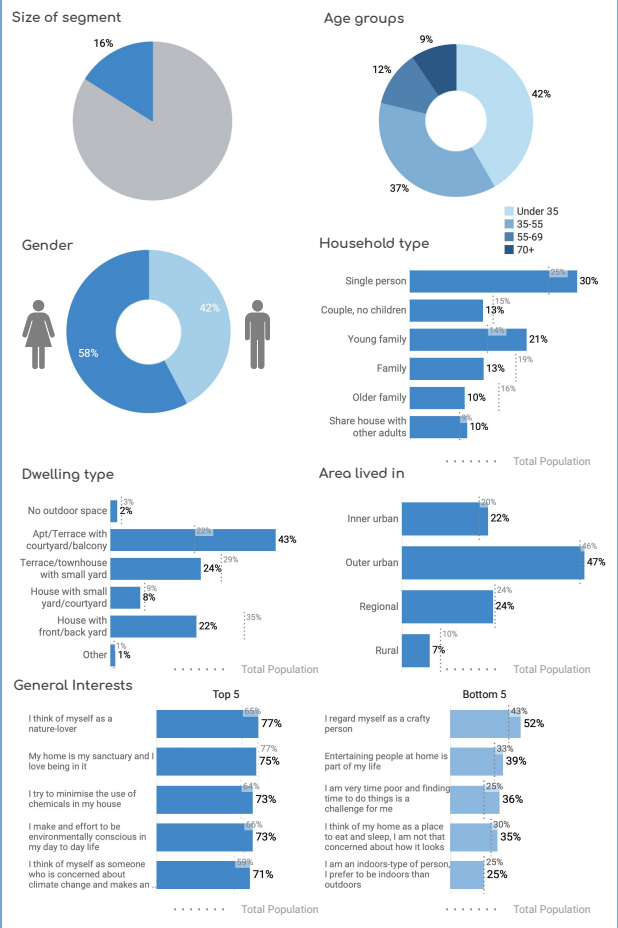
Inspire - Mel wants to be inspired by relevant content and is comfortable on digital channels.

Educate - show her how to better make use of limited space and boost her confidence and ability by sharing knowledge.

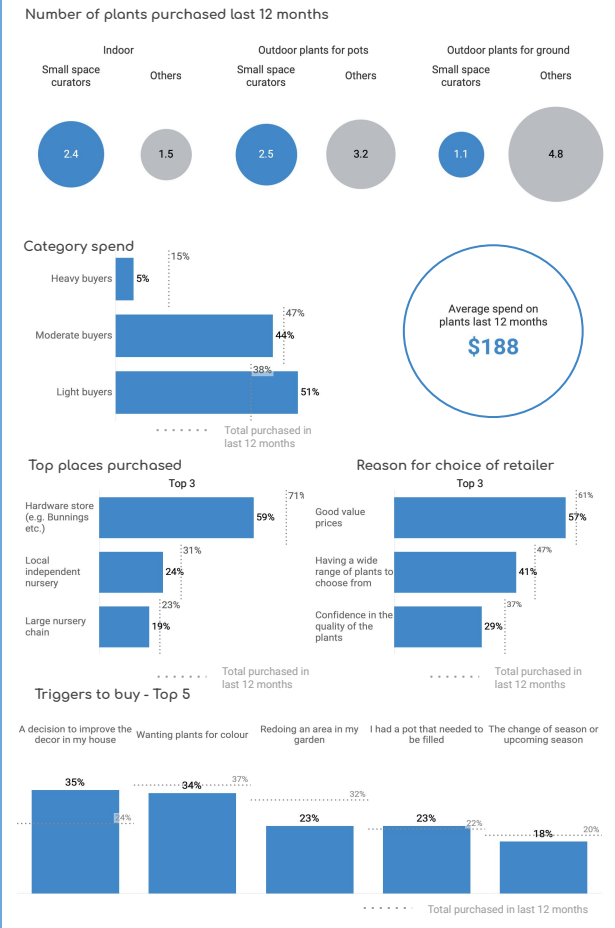
Nurture - Mel will move again and next time possibly to a bigger property with more garden.

SMALL SPACE CURATORS

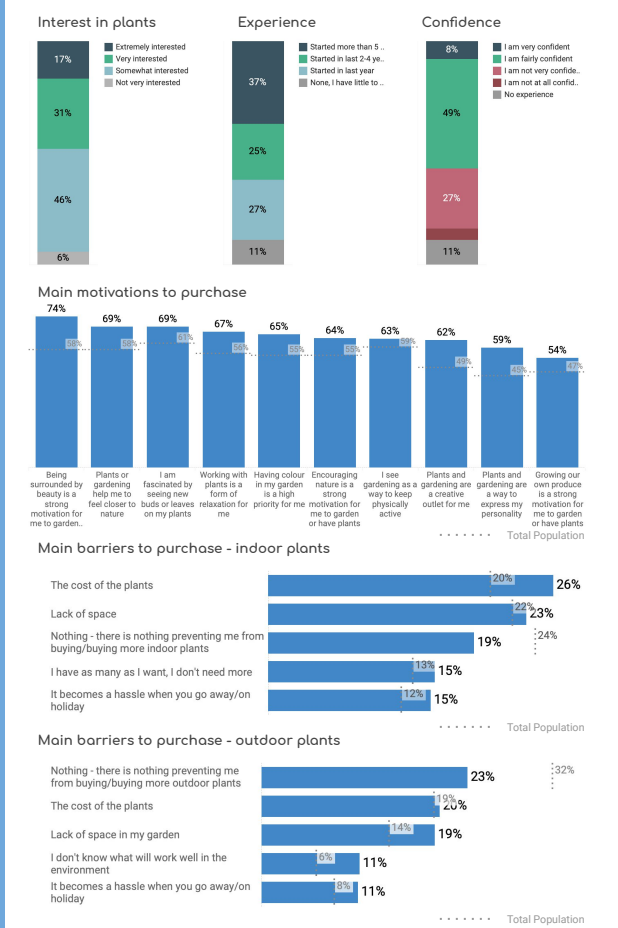
Demographics



Buying behaviour



Attitude to plants and gardening





"We do what we must for our garden to be presentable. As long as it's neat, easy to maintain and the boys can play outside, I'm happy. Gardening isn't a priority."

Bio

Leigh is quite settled in the townhouse that she shares with her husband and two teenage sons. Their front garden is small, but their backyard is big enough to have friends over for a barbeque and for the boys to splash in the pool. It's important that their garden looks good as it's part of the overall package when they consider their home.

They do have a number of herbs growing in pots that Leigh planted from seeds and now looks after. She knows enough to grow the basics and have a regular supply of fresh herbs. She's had a watering system added to the potted plants in their backyard so it is one less thing to have to remember to do given their busy lives.

They intentionally keep things simple and low maintenance because gardening isn't a passion for either of them, and life is just too hectic to for really getting into gardening. For bigger or messier projects, they would definitely consider paying for help.

Leigh has been known to buy a plant on impulse at the hardware store to replace a plant that has died - after all, she does like the look of plants.

Indoor plants bought last year 1

Outdoor plants bought last year 4

Motivators

Outdoor space - for the family to enjoy being outdoors and to be a pleasant place to entertain.

Own produce - plants for the kitchen offer some reward and seem worth the effort.

Physical activity - although not her favourite activity, Leigh sees the physical benefit of working in the garden.

Beauty - a presentable garden is part of the package for a nice looking and feeling home.

Barriers

Lack of motivation - gardening is not a passion, more of a chore to be fit into an already busy schedule.

Cost - unless its edibles, or a specific plant for an indoor project, gardening spend isn't a priority.

Space - although not avid gardeners, lack of space is considered a barrier for buying more plants.

Engage with me

Trigger impulse purchases - they will buy the right plant at the right price if it catches her eye when out and about.

Make it really easy - show low maintenance plants, inspiration and solutions.

Nurture - grow and support Leigh's interest in edibles and trigger purchases for new season planting and items that will increase yield and success rate.

Segment Size 17% of Adults
Segment Value \$168M per annum

Status Family, older family with kids in late teens
Work Full time, HHI \$180K
Dwelling Owned, urban, large house with small yard areas
Traits Busy provider, unmotivated gardener

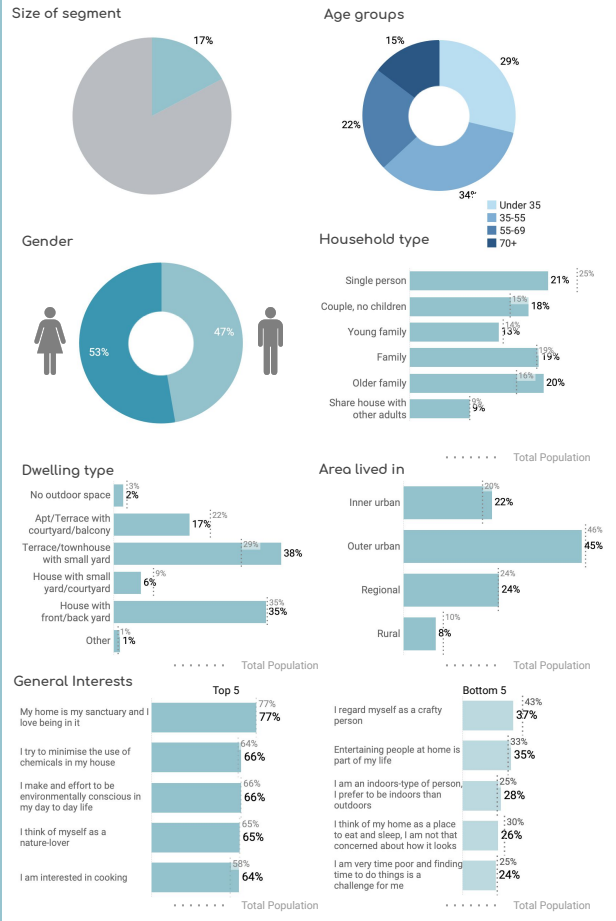
Interest



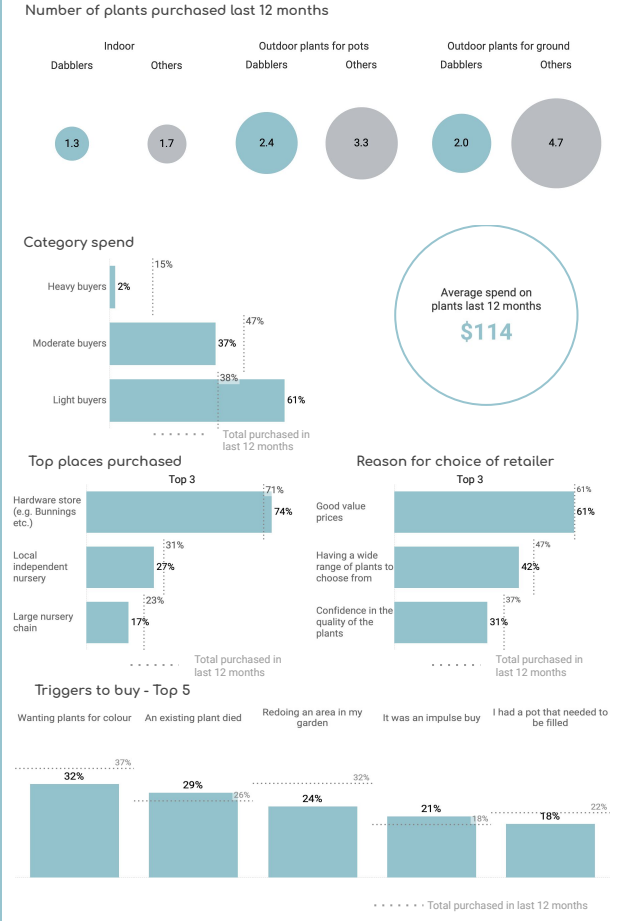
Confidence



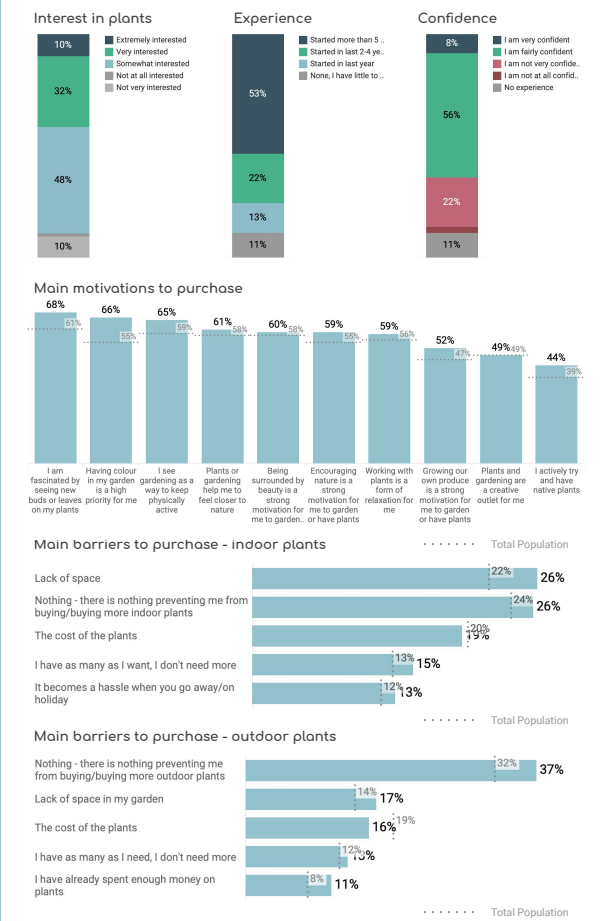
Demographics



Buying behaviour



Attitude to plants and gardening





Brett, 25

Segment Size 7% of Adults


Segment Value \$12M per annum


Status Single person

Work Full-time, HHI \$60K

Dwelling Rented, urban, apartment with balcony

Traits Not motivated to garden

Interest 

Confidence 

"I killed the last plant I bought, in fact the pot is still empty! Maybe I should grow some veggies in it this time, but I'll have to read up on that first."

Bio

Brett moved into his apartment 2 years ago. Of the 2 plants he received as housewarming gifts, only the one survived.

He tried growing a few things on his balcony, including one he slipped from his mom's garden, but without much success.

It's not that Brett doesn't like the idea of gardening or being outside, it's just that when it comes to time and money, gardening is just not a priority. Besides, he doesn't particularly enjoy it and space doesn't really allow for it. However, he is open to learn a bit more at some point.

Brett appreciates that for other people, gardening is relaxing and keeps you active, but if he were to grow herbs or veggies it would be more about having budget friendly fresh ingredients to use. He is aware that veggies would need water though.

One thing he's sure of is that if he had a bigger garden space, he'd get someone in to help him with it.

Indoor plants bought last year 0

Outdoor plants bought last year 1

Motivators

Low maintenance - plants that are easy to keep alive and don't need much attention.

Barriers

Bad memories - a history of plants dying has undermined confidence in plant ownership.

Fear & loathing - it doesn't seem worth the hassle when they end up dying from neglect or ignorance

Space - to garden you need space to get messy and to store your tools.

Budget - plants are just not a priority at the moment.

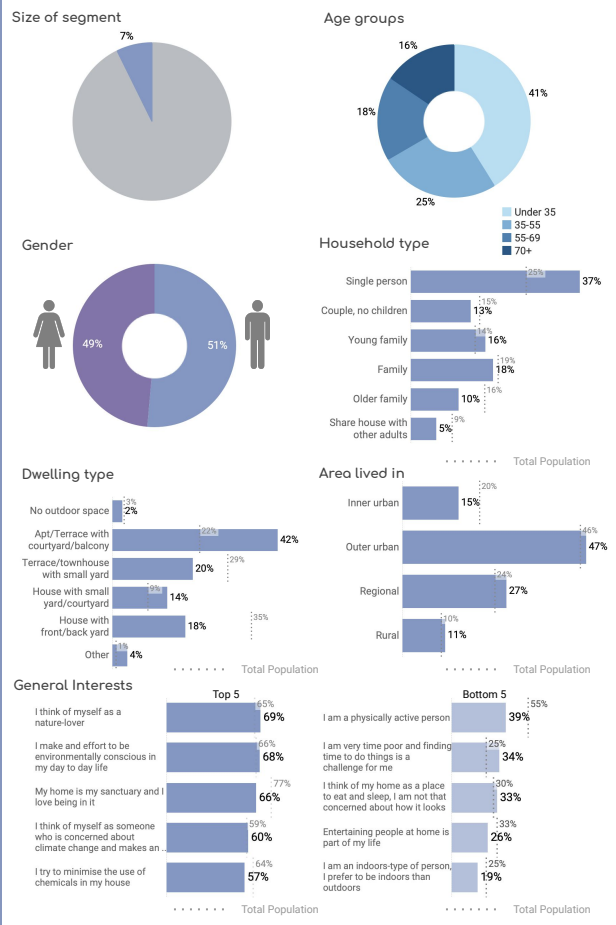
Engage with me

Make it easy - build awareness of low maintenance plants that are good for small spaces and don't require much attention.

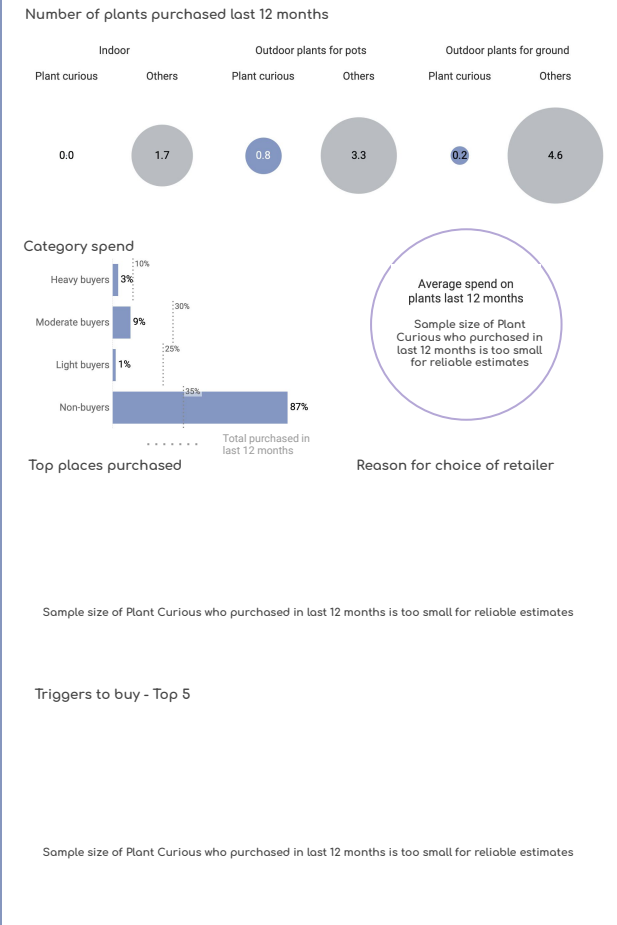
Make plants relevant - see how to link plants to other interests like making decor interesting or cooking.

Educate - short simple instructions for placement and care will encourage success.

Demographics



Buying behaviour



Attitude to plants and gardening

