GROWERTALKS

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What’s She Thinking?

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Average Jill walks into a garden center. She looks at your rack of blooming bedding plants, seven varieties tall with an army row of plant tags. You watch her browse the selection—picking up plants, putting them down, circling displays, glancing at her watch, throwing nervous glances at the other shoppers as they choose their flowers.

And you wonder, what’s she thinking?

We decided to take a closer look at Average Jill—both at the macro level of U.S. consumers in general and then at the garden center level. The reality of Average Jill is that she has never been quite as diverse as she is now. From multidimensional households to multiple shopping habits, she’s a hard one to peg.

“Everyone is different,” says Bill Calkins, former editor of *Green Profit* and current business manager for independent garden centers at Ball Horticultural Company. If that isn’t enough, “People behave differently on Tuesday than they do on Saturday.”

Plus, according to Frank About Women, two out of three women claim their shopping habits have changed in the past few years. In other words, even if you thought you knew who your customer was and what she wanted three years ago, it’s probably time to start from scratch and get to know her (or the many versions of her) again. We’ll get you started here, but since demographics and customers vary across markets, we can’t stress enough the importance of doing your own investigation about your final customers.

The state of the consumer: pessimistic

It hardly bears repeating: the feeling of pessimism is rampant. U.S. consumer confidence fell 17 points from the second half of 2007 to the first half of 2008. So for the rest of the year, what’s the biggest worry on people’s minds? According to The Nielsen Company’s latest survey, the economy ranks as the biggest concern for 35% of U.S. consumers. That’s followed by debt (15%), work/life balance (8%), health (6%), job security (5%), children’s education and/or welfare, ability to afford retirement (4%) and terrorism (3%). War, political instability, immigration and global warming all registered at 2%.

Strategy: “Know your shoppers,” says Todd Hale, senior vice president of Consumer & Shopper Insights Nielsen Consumer Panel Services. “Understanding the demographics of your loyal shoppers is absolutely essential for growth. …Success will come to retailers who define themselves by who they sell to and how they sell them, not by what they sell, while success will come to manufacturers who define themselves by who they sell to and the issues they solve for their consumers and retail partners."

- Follow them as they shop.
- Ask them questions.
- Do professional focus group research.
- If you're a wholesale grower, spend time in your customers' stores.

Value and convenience continue to be the characteristics driving growth for retailers. Supercenters and warehouse clubs are gaining market share this way. However, Nielsen Company's research has also shown that traditional grocery stores competing against supercenters have increased same-store sales by focusing on health, convenience, value and a proximity to shoppers.

Solutions: Use the strategies above to identify your Average Jill's worries and challenges. Then put on your marketing hat to reposition products: Offer plants that can help shade the house and reduce cooling costs (economy). Help her transform the yard into the vacation (a.k.a. "staycation") destination (economy and life/work balance). Give her the power of growing her own vegetables and feeding her family (economy, health). Promote drought-tolerant plants to ease the water bill (economy and drought). Communicate the psychological benefits of plants in the home and landscape (work/life balance, health). Promote the health benefits of gardening and the air-quality benefits of indoor plants (health). Make gardening kid friendly—as a family activity and as an educational tool (children).

She loves to shop?

Average Jill just loves the feeling of a shopping cart and a credit card, right? Maybe not. According to new research conducted in February 2008 by Frank About Women, a marketing communications company, the number of women who get a thrill out of shopping is falling. Part of that, they suggest, has to do with the economy and women "practicing voluntary thrift." But part of it may also be the stores' faults.

"Women are bored with shopping," says Jennifer Ganshirt, co-founder and managing partner of Frank About Women. "We found that retailers are falling short in giving women the inspiration, ideas, sensory stimulation and escape they are seeking in their shopping experience, which is yet another reason why women are spending less time in stores."

In their Women's Retail Rituals study, 15% of women said they found inspiration and ideas when shopping in a store; 16% said shopping provides an escape from the world; and only 12% believe store environments stimulate their senses.

Strategy: With an end product that's supposed to recreate a natural environment, calm the senses and decorate the home (which she wants to be a place for gathering and relaxing), garden centers have a huge opportunity to model their stores and products so they inspire and even offer a place of refuge (think of the garden centers who have extensive display gardens, places to sit and relax, venues for food, etc.).

Solutions: Do whatever you can to make her shopping experience stress free, from environmental soothers to guiding her buying decisions, to offering fast solutions for Average Jill in a rush. Better yet, make the time spent in the store stress relieving or at least position your products as a vehicle to stress relief. Use packaging and signage to follow through on this theme. Create displays that inspire but that don't overwhelm her with "I can't do that" thoughts.

Gardening: she doesn't know what she's doing

In a 2005 National Gardening Association (NGA) study called "What Gardeners Think," U.S. households defined themselves as follows: master gardeners (2%), garden enthusiasts (7%), casual gardeners (31%), reluctant gardeners (23%), just cut the grass (15%), and none of the above (23%). That means only 9% of your potential end-users consider themselves passionate gardeners.

We tapped into Bill Calkins, who has conducted numerous Consumer Buzz Live! panels where he's picked the brains of consumers (ranging from non-gardeners to beginners and masters), and he stresses that the biggest surprise was how little consumers really know about gardening. "I was stunned, and I continue to be amazed." He adds, "That means they gravitate towards the basics."

Panelists, especially those under age 35, also often indicated being intimidated by high-end garden centers and felt more comfortable in big-box stores. Among women in the 18 to 34 year-old category, lack of knowledge has built a wall of resistance, yet they're eager to learn. In the NGA's "What Gardeners Think" study, this group registered much higher rates surrounding their lack of knowledge, yet they were also open to learning. Thirty-seven percent said one of the things they disliked about gardening was that they didn't know how to garden (as opposed to the 21% national average across all demographics). And 28% of women in that age bracket said they'd garden more if they had an easy resource for information (compare that to 17% of all U.S. households who said yes to the same question).

The strategy: Assume they know nothing. Provide everything. Also, consider what they do know: where they want to put plants and how they want those plants to enhance their surroundings.

The solutions: Classify plants with terms that fit consumers' needs: plants for shade/sun (hopefully you already do that), plants for the window box, plants for the border, plants for the rock garden, plants I don't need to water often, plants for the mailbox garden or foundation plantings and so on. Then proceed to the point below.

Provide more care information and make it easy to understand and follow. (For example, communicate that full sun means 6 hours of sunlight.) Think of it as adding value and as an insurance policy. In fact, horticultural researchers Terri Starman and Bridget Behe just published research on the marketing and economics of container gardens in HortScience (43: 286-683). In their study, 76% of consumer participants said they'd be more likely to purchase a container garden if extensive care information were included in the purchase (and that's an already planted garden!). And one young woman on an under-35 Consumer Buzz Live! panel had this to say: "I would spend a lot more money on plants if I was given the confidence that I knew what I was doing."
Bill suggests making that information available so that it's usable at the point where it will be needed—in the garden or on the patio. Besides tags, container printing, and POS instructions, other formats might include web-based information centers (85% of Terri and Bridget's respondents said they'd go to a web site for care info) and even podcasts.

♦ **Quick tip:** *Before finalizing plant care information, ask an "unknowledgeable" gardener to read it. Can they follow the instructions? Do they have additional questions?*

Gardening: Her other obstacles

Average Jill's perception of gardening is usually her biggest stumbling block and your greatest opportunity to change her buying habits. Besides the fear of failure and the hesitation caused by not knowing what to do or how to do it, discussed above, what else can keep Average Jill from ringing up at the cash register?

Too much time, too much work, and too much of an expense are three major assumptions holding her back. In the “What Gardeners Think” survey, 25% of respondents identified “it’s too much work” as one of the things they don’t like about gardening, and the time required to garden also topped their list of dislikes.

Strategy: Sell products that work against these preconceived notions.

Solutions: The possibilities are endless for time- and labor-saving solutions—everything from mixed containers, to hiring out design consultants and landscape installation crews, to self-watering irrigation solutions, and easy-to-care-for plants. To address the expense issue, don’t lower your price; increase the value. You’ll easily up the ante by providing more information and using some of the other strategies and solutions discussed above.

Think about it: Average Jill may be willing to pay $4.99 for a little houseplant that will decorate her office desk, but what will she pay for the same plant if it’s an air-cleaning, creativity-inducing, stress-relieving piece of art? And if you sell her a self-watering planter so it won’t dry up and die when she’s on vacation next week? Then we’re getting somewhere.

FACTS FOR THOUGHT

Battle of the Joneses continues. A May 2008 Consumer Reports’ poll indicates that lawn envy (and likely garden envy, as well) is still rampant: 64% of consumers think their neighbor has the best lawn on the block. But creating envy also creates advertising and information exchanges. Bill Calkins notes, “By far and away, people get most of their information from their neighbor over the fence.”

Lawn & garden is up. Retail sales of lawn and garden products increased 3% to $35.102 billion in 2007, according to the National Gardening Survey conducted by the National Gardening Association. It’s the first increase in overall sales since 2002.

Power of color. Can you use color to influence purchasing decisions? Yes. According to the Color Marketing Group, in 2008, looking stylish means looking natural: off-whites, sandy and linen-like colors, brownish greens. And lots of white. Also look for ethnic accent colors. Looking ahead to 2009, we’ve seen reports that the safe, traditional and comforting colors of a neutral palette will be prominent, along with trendy acid greens and other brights used as accents. Violet, wine and amethyst are also predicted as up-and-coming colors. And with a continued eco-consciousness, green will continue to have a positive association for many consumers.

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