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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DID YOU KNOW?

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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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