Gardens

THE CONSUMER MARKET FOR GARDEN PLANTS

by
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PREFACE

One of the objectives of the Market Research Centre is to initiate market investigations that are relevant to industries that have had little experience with market research. The New Zealand nursery industry falls into this category, and the study reported here was undertaken to provide nurserymen with some basic information concerning the consumer market for nursery plants.

The study was financed jointly by the Market Research Centre and the New Zealand Nursery Research Centre. The latter organisation was established at Massey University in 1975 under the joint sponsorship of the University and members of the nursery industry.

This report, which is the sixth in the Market Research Centre's Consumer Report series, has been prepared by Mr I.J. Bourke and Mrs S.J. West. The authors conclude that the market for nursery plants is at an early stage of development. Many opportunities for expansion are identified, the markets for houseplants and for plants as gifts holding particular promise. The findings of the research indicate the importance of maintaining high standards of plant quality.

The study identified several topics that warrant further market research. While some of this work can be undertaken publicly, in the manner of this study, scope also exists for the nursery industry to engage the services of commercial market research consultants.

R.W. CARTWRIGHT

DIRECTOR

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SUMMARY AND CONCLUSIONS

SUMMARY

This survey, covering the purchase of plants and garden requisites, was carried out to provide information about the buying public, their reasons for buying, the outlets they frequent, and their attitudes towards these outlets. 1104 households in Auckland, Palmerston North, Christchurch and Invercargill were surveyed by mail and asked for their views. Some sixty-three percent responded.

The main points arising were:

* A high proportion of respondents purchase vegetable plants, flower plants, and fertilisers although total annual expenditure is not generally high, being in the $1 - $10 range per household.

* Purchases of shrubs and trees are likely to take place less often than for other garden items although total annual expenditure is generally higher.

* Most consumers see development of their residential section as an irregular occurrence, and they spend less time and money after initial development has been completed. The only areas receiving regular attention are the vegetable and flower gardens.

* The market for houseplants is largely untapped, with a high proportion of households either never purchasing or purchasing only occasionally. In addition annual expenditures per household are usually low in this area.

* When seeking advice on the type of plants, shrubs or trees to buy the great majority of people rely on advice at the place of purchase. The next two most common sources of advice are from books or newspaper articles, and friends and acquaintances.

* The importance of experienced and knowledgeable staff at the point of purchase is reinforced by the fact that the main suggestions for improvement at retail outlets relate to improved information about plants and their care and the use of fertilisers and sprays.

* Most consumers do not travel more than five miles to buy garden requirements, preferring to patronise outlets near their home.

* Garden centres and/or nurseries are by far the most common outlets from which consumers purchase plants and garden requirements. Garden tools and ornaments are the only products for which other outlets are dominant, although bulbs, seeds, fertilisers and chemicals are also commonly bought outside garden centres.

* Consumers see quality of merchandise, a wide selection, and quality of service given as the most important features of a garden retail outlet. Price is placed surprisingly low in importance.

* Garden centres and/or nurseries are rated highest in most categories, but particularly in quality, selection, and service. The only areas where other outlets provide significant competition are lower prices and ease of access.

* Giving gift vouchers or plants as presents is not a common practice. Many people either do not think of vouchers when deciding on gifts or are unaware of their existence.

* Recognition and correct identification of the New Zealand Nurserymen's Association symbol is generally high, although the consumers who recall seeing it are almost equally divided as to whether or not the display of this sign is important. For those considering it important it is largely a sign of quality; to others the product and its price are more important.

* Most consumers are well satisfied with present services at retail outlets or have no suggestion for improvement. Suggestions for improvement broadly relate to better information on all aspects of plants and their care.

CONCLUSIONS

The nursery industry should make strong efforts to increase both the level of expenditure and the regularity of purchase of garden items since these are in general low. Many consumers regard initial development of the garden as the main period of expenditure and do not carry out regular care and replacement. Greater emphasis by the industry on this latter aspect could stimulate increased expenditures.

Houseplants in particular receive low annual expenditure with a large proportion of consumers never buying them. Considerable scope for increased purchase therefore exists.

Consumers see the place of purchase as the main source of information about plants, shrubs and trees. Other important sources are books, newspaper articles, and friends and acquaintances. The industry should therefore ensure that appropriate information is readily available through these sources. In particular sales staff at retail outlets should be capable of providing a wide range of information about plants and their care.

Retail outlets must concentrate strongly on quality of merchandise and service, together with the provision of a wide selection of goods since these features are regarded as most important by the consumer.

Greater promotion of plant gift vouchers and the suitability of plants for gifts should take place since many consumers are unaware that gift vouchers exist or do not think of plants as gifts. Greater awareness must therefore be stimulated.

While significant recognition of the N.Z.N.A. symbol exists many consumers do not consider it important when selecting a retail outlet to purchase from. They must therefore be convinced that it signifies quality, reliability and professional competence.

RECOMMENDATIONS

This research indicates several areas where further studies could be of value to the nursery industry, both from the retailers' point of view and that of the grower. The importance of regional consumer differences within New Zealand as shown throughout this survey is an indication that further consumer research could be conducted at local retail outlets. Topics of interest include:

- consumer shopping and purchasing habits and garden centre loyalty
- consumer knowledge of specific plants and related products
- development of markets for products such as houseplants and garden furniture.

Further research of interest to the New Zealand nursery industry as a whole includes the customer's perception of the nursery or grower and the retail garden centre; the retailer's attitude to maintaining standards of product quality; the development of markets for new products; and extension of existing markets such as the gift market including seasonal implications to growers.

I. INTRODUCTION

BACKGROUND

Purchase of plants and garden materials by the general consumer may take place through garden centres, nurseries, hardware stores, supermarkets, mail order and many smaller outlets. Some of these carry a wide range of both plants and garden materials while others specialise in particular lines.

While individual retailers may have a general knowledge of their consumers, little detailed information exists about the buying public, their reasons for buying, the outlets they frequent, and their attitudes towards these outlets.

This present survey was designed to provide this information in a form suitable for use by growers, garden centre operators, and retailers.

Information at the consumer level, rather than trade buyers such as city councils and landscape gardeners, was considered most appropriate because it is here that demand for plant and garden materials originate. This ensured that a wide group involved in the industry could effectively use the information developed.

The areas investigated in the survey were selected following a brief survey of its members carried out by the New Zealand Nurserymen's Association. Members were requested to indicate those areas they felt were most important to investigate.

The study should be seen as an initial examination of the market for garden plants and garden requirements. An attempt was made to gain a small amount of information about a wide range of subjects with a view to stimulating greater interest in more detailed information on those topics.

It is to be hoped that future work can follow up a number of these points and enlarge and up-date information obtained in this survey. By doing so the nursery industry will be in a better position to understand and service consumer needs.

OBJECTIVES

Specifically the objectives were to obtain general information regarding:

a) The characteristics of the buyers of plants and garden requirements and details of the use of these products.

b) Consumer views on the products available and the retail outlets selling these products.

c) Adequacy and satisfaction with existing retail outlets, their services, and the products available.

RESEARCH PROCEDURE

A mail survey of randomly chosen households in Auckland, Palmerston North, Christchurch and Invercargill was carried out. Within the household the person doing the most gardening was asked to complete the questionnaire.

Mailing began at the end of February 1976 and replies ceased in late May 1976. The total sample of 1104 was allocated between centres as follows:

	Total Mailing	%
Auckland	538	48.7
Palmerston North	158	14.3
Christchurch	247	22.4
Invercargill	161	14.6
	1104	100.0

Details of the sample, its selection, and a copy of the questionnaire and associated letters are included in the appendices.

RESPONSE

Twelve percent of questionnaires mailed out were returned by the Post Office as 'Gone No Address'. If those undelivered are omitted from the analysis the overall response rate was a satisfactory sixty-three percent. Within centres, the two smaller cities (Palmerston North and Invercargill), gave significantly higher response rates than the two larger cities.

Response Rates	Number Responding (No.)	Proportion of Total Mailing (%)	Proportion of Questionnaires Delivered (%)
Auckland	272	50.6	59.0
Palmerston North	99	62.6	69.2
Christchurch	137	55.5	62.0
Invercargill	105	65.2	73.9
Total	613	55.5	63.4

CHARACTERISTICS OF THE RESPONDENTS

It was asked that the questionnaires be completed by the person in the household who did most of the gardening.

Age and Sex

Completed questionnaires showed that some 60 percent of respondents were male, and that the largest proportion were in the 40 - 59 year age group. There were significant differences between centres as shown by the following tables. Of particular interest is the lower proportion of males in the Invercargill section and the much younger age of the majority of respondents in that region - 44 percent were in the 20 - 39 year age group.

Sex

	Auck. %	P.N. %	Chch. %	Inver. %	Total %	NZ Population as at 1971 Census %
Male	61.2	64.0	58.6	55.4	60.2	50.0
Female	38.8	36.0	41.4	44.6	39.9	50.0
Total	100.0	100.0	100.0	100.0	100.0	100.0
No. Responding	268	100	133	101	602	

Age

	Auck. %	P.N. %	Chch. %	Inver. %	Total %	NZ Population as at 1971 Census %
Less than 19	1.1	-	-	-	0.5	
20 - 39 years	29.9	37.0	30.3	44.4	33.6	43.8
40 - 59 years	39.6	32.0	37 1	31.3	36.4	35.1
60+	29.5	31.0	32.6	24.2	29.5	21.2
Total	100.0	100.0	100.0	100.0	100.0	100.0
No. Responding	268	100	132	99	599	

When compared with the 1971 Census figures (latest available) a higher proportion of respondents were in the 60+ age group than appear in the general population, and a lower proportion in the 20 - 39 age group. This may be due to a greater interest in gardening by older people, or the greater willingness of older people to return a completed questionnaire.

Occupation

The proportions in each occupation category are shown below.

Employment of Head of Household

		Auck. %	Palm.N %	Chch. %	Inver. %	Total %
1.	Professional	15.1	15.3	7.9	9.3	12.6
2.	Managers & Directors	8.9	7.1	7.9	7.2	8.1
3.	Clerical	12.4	9.2	7.1	12.4	10.7
4.	Sales Staff	11.2	8.2	9.5	13.4	10.7
5.	Agric. Workers	0.4	4.1	2.4	1.0	1.6
6.	Production Workers	20.2	18.4	31.8	28.9	23.8
7.	Service Workers	3.5	6.1	0.8	3.1	3.3
8.	Self Employed & N.E.C.	0.8	1.0	-	-	0.5
9.	Armed Forces/Police	1.2	1.0	2.4	1.0	1.4
10.	Retired	21.3	21.4	22.2	17.5	20.9
11.	Housewife	5.0	8.2	7.9	6.2	6.4
	Total	100.0	100.0	100.0	100.0	100.0
	No. Responding	258	98	126	97	579

Income of Head of Household

Comparison of incomes with national data could not take place because the most recent census relates to 1971. Income distribution will almost certainly have changed dramatically since that time.

Income of Head of Household

	Auck. %	Palm.N. %	Chch. %	Inver. %	Total %
Less than $3,000	15.1	15.1	17.2	15.8	15.7
$3,001 - $5,000	17.5	18.3	16.4	11.9	16.4
$5,001 - $10,000	48.4	55.9	51.6	59.4	52.3
$10,001 - $15,000	11.9	9.7	12.3	9.9	11.3
$15,001+	7.1	1.1	2.5	3.0	4.4
Total	100.0	100.0	100.0	100.0	100.0
No. Responding	252	93	122	101	568

II. FINDINGS

CARE OF GARDEN AND SURROUNDS (Table A.2)*

As would be expected, a majority of husbands and wives tend the garden, lawns and other plants. A small minority use part-time assistance in cutting lawns and weeding gardens. In the main these are elderly people. Palmerston North and Invercargill have a slightly higher proportion of husband and/or wife caring for the grounds than do Auckland and Christchurch.

PURCHASE OF PLANTS AND GARDEN REQUIREMENTS (Tables A.5 to A.14)

Respondents were given a list of items and asked for each whether they bought them often, occasionally, or 'never'.

Vegetable plants were the most 'often' purchased items (52% of respondents), followed by flower plants (36%), fertilisers (35%), chemicals and/or sprays (27%), shrubs and/or trees (23%) and bulbs, houseplants and flower seeds (all in the 12% - 15% range). Most respondents purchased something in each category 'occasionally', although lawn seed, flower seeds, houseplants, and bulbs showed a reasonably high level (22% - 31%) of 'no purchase'.

The general pattern of purchasing would seem to be that half of the respondents regularly purchase vegetable plants, approximately one quarter to one third regularly purchase flower plants, fertilisers, chemicals and sprays, and less than one quarter regularly purchase trees, shrubs and houseplants. The high proportion of respondents who never purchase houseplants would suggest either a need for increased promotion or improved availability, particularly in Palmerston North and Invercargill. Interest in vegetable production (which no doubt affects the purchase of fertilisers and sprays) is also noteworthy.

* Tables indicated appear in the appendix.

There are quite marked regional differences in some of the categories. In particular the proportion of respondents who 'often' bought trees and shrubs was very low in Palmerston North when compared with the other three centres surveyed.

The proportion of respondents buying chemicals and/or sprays 'often' was highest in Christchurch, but the overall difference between regions was relatively slight, as was the case with fertilisers. Houseplants were bought more 'often' in Auckland and Christchurch than in Palmerston North and Invercargill.

Auckland recorded a relatively low proportion of 'often' purchases for vegetable plants when compared with other regions. The pattern seems to be of greater purchases of trees and shrubs in the Auckland area and less functional gardening. Palmerston North seems to be lowest, proportionally, in most categories.

OTHER SOURCES OF PLANTS (Tables A.3, A.4)

Respondents were asked the extent to which they took cuttings from mature plants, and whether they obtained mature plants from friends and acquaintances. This was to determine the extent to which people obtain plants from sources other than retail or wholesale outlets.

Indications from the response are that most people obtain plants at some time by taking cuttings or receiving mature plants from friends, although there are definite regional differences in the number of people who do so. In particular in Christchurch 20 percent of respondents took cuttings 'often' and 24 percent got mature plants 'often', whereas in Palmerston North the corresponding figures were 12 percent and 18 percent respectively.

EXPENDITURES ON PLANTS AND GARDEN REQUIREMENTS (Tables A.15 to A.24)

Respondents were asked to indicate the approximate amount they spent on various garden items in 1975.

Expenditure on houseplants was low, reflecting the fact that a considerable number of people did not purchase houseplants.

Expenditure on bulbs and seeds, both relatively low cost items was, as expected, in the $1 to $10 category for most respondents, but the relatively low level of 'Nil' replies would suggest that this is a large total market.

Much the same comment applies to vegetables and/or flower plants as applies to bulbs and seeds. Very few (only 6%) respondents spent 'Nil', the bulk (63%) spending $1 to $10, and a further 24 percent spending $11 to $20. The wide appeal of this category appears obvious.

Expenditure on shrubs and trees is spread over a wider range than other categories with 28 percent spending $1 to $10, 24 percent spending $11 to $20, 16 percent spending $21 to $50 and 9 percent spending $50 and over. It is likely that the price of these articles is a factor in the higher total expenditure.

In a similar manner price is an important factor in the purchase of garden tools and furniture, since individual items in this group may require heavy expenditure, particularly such items as lawnmowers, garden tables, etc. (This view is born out by comments made on individual replies.) In this category 'Nil' expenditure is high as is expenditure in the $1 to $10 range. However, at the other end of the scale, expenditure in the $51 to $100+ category is higher than for all other items except shrubs and trees. Expenditure in the $100+ category does however, outrank the shrubs and trees falling into this category.

A low proportion of respondents spent nothing on chemical sprays and fertiliser, the majority of expenditures being in the $1 to $10 and $11 to $20 categories. This suggests that these items are purchased regularly and therefore represent a large market. This may be particularly true for fertilisers.

Regional variation showed up in a number of these categories. For instance, Auckland showed a considerably higher proportion making no purchases of bulbs and seeds than did other centres. This situation was repeated for vegetables and/or flower plants. Conversely Auckland had a higher proportion spending more than $21 annually on shrubs and trees than all centres except Invercargill.

In the case of chemicals, sprays and fertilisers, Invercargill showed a much lower proportion spending nothing on these items, and consequently a higher proportion spending between $21 and $50.

About one third of the respondents spent more in 1975 on their garden than they did in 1974, and 14 percent spent less. A higher proportion in Auckland and Palmerston North spent less in 1975 than was the case in other centres. The main reasons given for a greater expenditure in 1975 were 'higher prices' (27%), 'expansion and development of the section' (19%), 'bought mower or tools' (11%), 'planted more trees' (11%). The main reason for a smaller expenditure was 'completion of garden development' (63%).

SOURCES OF INFORMATION ON PLANTS, SHRUBS AND TREES (Table A.25)

Respondents were asked to indicate their main source of information about plants, shrubs and trees they bought. 'Advice at the place of purchase' clearly rated as the most important source of information, particularly in the Invercargill area. Almost half of the respondents noted this source of information. 'Books and newspaper articles' ranked second in Auckland and Palmerston North, but also ranked behind 'advice from friends and acquaintances' in the two South Island centres. The importance of an experienced and knowledgeable staff at the source of sale is further reinforced by the fact that of the suggestions given for improvement of retail service, a large proportion suggested an improvement in labelling or better information about plants, fertilisers, weed and pest control and spraying.

LOCATION OF RETAIL GARDEN OUTLET (Table A.26)

Some 93 percent of respondents live within five miles of the retail gardening centre that they use most often. As might be expected, the two larger centres, Auckland and Christchurch, showed a slightly higher proportion shopping more than five miles away from their home than did the two smaller centres. However, in all cases, the greatest majority lived within five miles. This would suggest that even in the larger centres there is a good coverage of retail gardening outlets close to most residential areas. It may further suggest that consumers prefer to shop close to their home, although the question of preference was not specifically followed up. Retail outlets should therefore be aware that their main clientele come from their immediate vicinity, although this is not to say that people necessarily shop at their closest gardening outlet, or that consumers show any strong loyalty to a specific retail outlet. In the two smaller centres in particular, a distance of 5 miles may cover the majority of the outlets available in the city.

It is notable however, that between 33 percent and 37 percent of the population shop within one mile of their home. This may indicate a strong preference for shopping at the closest gardening outlet.

RETAIL OUTLETS USED (Tables A.27 to A.33)

For all purchases except garden tools and ornaments, the garden centre or nursery was the most popular source of supply with the majority of respondents. Trees and shrubs were purchased at a garden centre by 98 percent of the respondents, houseplants by 89 percent and vegetable and flower plants by 86 percent. These percentages dropped to 70 percent for bulbs and seeds, and fertilisers and chemicals. Purchases in supermarkets for bulbs and seeds and hardware stores and supermarkets for fertilisers and chemicals were the main alternative sources. Garden tools and ornaments were purchased mainly in hardware stores.

Regionally, similar patterns appeared between centres although for most items Aucklanders used supermarkets to a higher degree than other centres, possibly due to the fact that supermarkets are more readily available. The department store as a source of garden tools and ornaments was slightly more popular in Auckland than in other centres, although the garden centre, nursery and hardware store were still the predominant sources of supply for these items.

<u>IMPORTANT FEATURES OF A RETAIL OUTLET</u> (Table A.34)

'Quality of merchandise' closely followed by 'a wide selection' were the main factors mentioned by respondents when asked to indicate what they considered most important in a retail outlet. These were mentioned by 31 percent and 26 percent of the respondents respectively. The next most important factor mentioned was the 'quality of service given'. Prices scored a surprisingly low 11 percent and most other categories were negligible (less than 5 percent of importance). Of note here is the fact that shop location and hours of operation are rated relatively low by most people. Different centres varied somewhat in the degree to which these various items were rated but in all cases the same three factors of quality, selection and service were considered most important. On the question of prices, Aucklanders rated price far more highly than did Invercargill people. In fact there appeared to be a steady gradation in the degree of importance of price from the high of Auckland through Palmerston North to Christchurch and down to the low of Invercargill.

<u>RATING RETAIL OUTLETS</u> (Tables A.35 to A.41)

When rating the various retail outlets on selection, service, quality, price, advice and access, by far the greatest majority of respondents rated the garden centre and/or nursery as having the widest selection, best service, highest quality and most useful advice. The only two items where other retail outlets showed any level of competition to the garden centre and/or nursery were in cheapness and ease of access. In fact, supermarkets rated above the garden centre and/or nursery for lowest price. Department stores also rated well in this category although significantly behind the other two outlets. It is of interest to note that even in ease of access the garden centre and/or nursery was rated highest, above supermarkets, although the latter scored considerably better in this category than in most other categories except price. It would appear from this rating that the garden centre and nursery is highly regarded by the majority of respondents on most of the important categories associated with buying garden requirements.

Regional variation was notable in a number of categories. For example, Auckland and Palmerston North revealed a much higher proportion of the respondents suggesting that supermarkets had lowest prices than was the case in Christchurch and Invercargill. Again, Aucklanders rated supermarkets considerably higher on ease of access than did other centres.

PLANTS AS GIFTS (Tables A.42 to A.44)

Some 38 percent (Christchurch) to 42 percent (Auckland) of respondents had not bought plants as a gift during the past year. This suggests that significant efforts should be made to encourage more people to provide plants as gifts for a variety of occasions.

Of those giving plants as gifts, the most common occasions where this was done were Mothers' Day, Christmas and Anniversaries.

Of those people who gave gift vouchers during the year most did so only once during that time. A further quarter had done so between two and five times. Only 3 percent had done so more frequently. It should be noted, however, that only about 20 percent of the respondents indicated they had actually bought gift vouchers during the year. Of those buying, Christchurch people appeared to do so less frequently than the other centres.

When asked why they had not given gift vouchers, a majority of people indicated they had either not thought of them or were unaware that gift vouchers existed. Some 50 percent indicated these two reasons. It would therefore appear that much greater publicity should be given to gift vouchers if they are to be used more regularly. Their availability and the giving of plants as presents must be continually kept in the consumer's mind. The only other major reason mentioned for not giving gift vouchers was that other things were more suitable. In this instance a change of attitude of the consumer is required rather than just an increase in awareness.

THE NEW ZEALAND NURSERYMEN'S ASSOCIATION SYMBOL (Tables A.45 to A.49)

Respondents were shown a replica of the New Zealand Nurserymen's Association symbol and asked whether or not they had seen it. They were then asked what the initials stood for. Nearly 60 percent of respondents had seen the symbol with the lowest proportion (40%) in Auckland and the highest (73%) in Christchurch. When asked to identify the meaning of the initials, again 60 percent identified them correctly while 17 percent were unsure. The highest incorrect answers were in Auckland.

Those who had seen the symbol were then asked whether display of this symbol by their retailer was important to them or not. The proportion answering 'yes' was almost exactly equalled by the proportion answering 'no'. Some 22 percent were undecided. Lowest support for showing the symbol was shown in Auckland and Palmerston North, although these Centres also showed the highest undecided rate. Some 60 percent were not convinced that the display of the sign had any great significance.

In identifying the symbol it is likely that some proportion of those replying guessed the meaning of the initials, rather than understood them. This is suggested by the fact that more people attempted to put the title to the initials than actually claimed to have seen the symbol. The view that some had guessed is borne out by the written replies where some people added the words "I think" or "I suppose" to the correct answer.

Of the 153 respondents who considered the sign important, 62 percent felt that it was a sign of quality, 11 percent that it was a sign of reliability and the remainder that it signified professional advice and qualifications.

Of those who felt the sign was unimportant, more than half considered that the product and the price were more important than the Association. A further 20 percent felt that staff and service were more important than the sign, and the remainder considered that either the sign meant little or was insufficient proof of quality.

These answers suggest that greater efforts must be put into convincing the consumer that the symbol signifies quality, reliability and a high level of professional advice. It is essential that those showing the sign meet these requirements and provide quality products at a reasonable price so that the symbol becomes associated with these characteristics.

IMPROVEMENT OF RETAIL SERVICE (Table A.50)

38 percent of respondents gave a straight 'no' in answer to the question "Is there any way that you would like to see your garden retailer improve his service?". A further 21 percent thought that there was no need for comment because the service was already satisfactory. This latter category differs from the 'no' category since it in fact implies a compliment as opposed to a flat 'no'. Of the remaining 40 percent suggestions made were very diverse, 'lower prices' being the only one mentioned by more than 5 percent of all respondents. This latter fact should be considered in relation to the earlier question which indicated that only a small proportion felt that prices were of prime importance in a retail outlet. If the particular categories are amalgamated under broad headings, it becomes clear that the most frequent improvement desired is for better information from the retailer. This relates to everything from general information on the plant to information about fertilisers, pricing, growing and spraying. Further, categories of better labelling, better and more polite service and more

knowledgeable staff could all be amalgamated under the broad heading of those who wish better service. It would seem therefore, that while the majority considered there was no need for improvement, those who suggest improvement largely reflect on the area of better service and better information. It is therefore important that the present generally high standard of these factors be continued and, if possible, improved upon.

APPENDIX

SAMPLE SELECTION AND RESPONSE RATES

(1) 1,104 households were selected randomly from the telephone directory, the sample being drawn from Auckland, Palmerston North, Christchurch and Invercargill. The total sample was allocated between these centres as follows:

Auckland	538
Palmerston North	158
Christchurch	247
Invercargill	161
	1,104

(2) These four centres were chosen to give a range of population sizes, different climatic zones, and with two in each of the North and South Islands.

(3) The sample was surveyed using a mail questionnaire. Approximately half of the households in each centre received a preliminary letter indicating the survey was taking place and that a questionnaire was following, the questionnaire, and one follow-up letter to those not responding to the questionnaire. The other half of each centre did not receive the preliminary letter, but a second follow-up letter was sent to those not responding after the first follow-up.

No clear advantage for either of these practices emerged. While Auckland showed a slightly higher response from the receipt of pre-notices, the other three centres showed the reverse.

MAILING PROCEDURES

	Auckland	Palmerston North	Christ-Church	Inver-cargill	Total
Total sent out	538	158	247	161	1,104
Total Returned	286	106	141	108	641
Total Usable Returned	272	99	137	105	613
Returned with pre-notice and 1 reminder	113	49	67	57	286
Returned without pre-notice but 2 reminders	138	42	57	41	278

(4) Mailing commenced in mid-March and acceptance of returns was closed in late May.

(5) To increase response rates, respondents in each centre were offered the opportunity to be included in the draw for a plant gift voucher worth $25. Four such vouchers were provided for this purpose by the New Zealand Nurserymen's Association, one respondent being randomly drawn for each centre from those who returned completed questionnaires.

(6) A high proportion of questionnaires were returned by the Post Office 'Gone No Address' due to the fact that new telephone books were being released at the time of the survey. The original samples for Auckland, Christchurch and Invercargill were drawn from old telephone books resulting in 14 percent, 11 percent and 12 percent respectively being returned by the Post Office. Palmerston North names were drawn from the new telephone book, resulting in 9 percent being returned. True response rate has been estimated using total mailing less 'Gone No Address' as the base.

RESPONSE RATES

	Size of Sample (No.)	Returned 'Gone No Address'(a) (No.)	Question-naires Delivered (No.)	Usable Q.naires Received(b) (No.)	Response Rate (c) (%)
Auckland	538	77	461	272	59.0
Palmerston North	158	15	143	99	69.2
Christchurch	247	26	221	137	62.0
Invercargill	161	19	142	105	73.9
Total	1,104	137	967	613	63.4

(a) Another mail survey being conducted by Market Research Centre, but taking its sample from the Electoral Roll has shown a similar high 'non-delivery' rate.

(b) Unusable questionnaires were 5%, 7%, 3% and 3% respectively for the four centres.

(c) 'Completed' as a proportion of 'Delivered'.

(7) If it may be assumed that those returning completed questionnaires are representative of the total population the response rates achieved provided estimates with the following precision at the 90 percent confidence level:

Auckland	± 3.7%	Palmerston North	± 6%
Christchurch	± 5.3%	Invercargill	± 5.9%.

TABLES OF FINDINGS

Table A.1

Q.2 At your dwelling do you have the following:

	Auck. %	P.Nth %	Chch. %	Inver. %	Total %
lawns	98.5	99.9	98.5	96.1	97.6
vegetable and/or flower plants	92.3	94.9	95.6	98.0	93.8
shrubs and/or trees	96.3	93.9	97.0	90.3	94.5
house plants	78.7	79.8	67.9	77.7	75.8
plants in tubs, pots or boxes	66.9	61.6	50.3	57.3	60.3
garden furniture and/or ornaments	41.2	26.3	18.2	24.3	34.3
No. of Respondents	272	99	137	103	611

Table A.2

Q.3 Who looks after your garden and surrounds?

	Auck. %	P.Nth %	Chch. %	Inver. %	Total %
Self	76.6	75.8	75.0	77.7	76.3
Self and Spouse	14.5	20.2	17.6	20.4	17.1
Gardener	2.2	0	0.7	0	1.2
Landlord	0	0	0	1.0	0.2
Other	6.7	4.0	6.6	1.0	5.3
	100	100	100	100	100
No. of Respondents	269	99	136	103	607

Table A.3

Q.5(a) Do you make cuttings from mature plants to grow new plants?

	Auck. %	P.Nth %	Chch. %	Inver. %	Total %
Often	18.5	12.4	19.5	15.8	17.3
Occasionally	59.4	64.9	57.9	61.4	60.3
Never	22.1	22.7	22.6	22.8	22.4
	100	100	100	100	100
No. of Respondents	271	97	133	101	602

Table A.4

Q.5(b) Do you get mature plants from friends/acquaintances, etc.?

	Auck. %	P.Nth %	Chch. %	Inver. %	Total %
Often	15.3	18.2	23.5	23.6	18.9
Occationally	64.5	75.0	65.5	66.3	66.7
Never	20.2	6.8	10.9	10.1	14.3
	100	100	100	100	100
No. of Respondents	248	88	119	89	544

Table A.5

Q.6 Which of the following do you buy for your garden (both indoor and/or outdoor), either often, occasionally or never?

(a) Totals Only

	Often %	Occasionally %	Never %	Total %	No. Responding
Bulbs	14.2	64.1	21.7	100	515
Flower seeds	15.4	59.7	24.8	100	499
Lawn seed	3.8	64.8	31.4	100	475
Flower plants	35.8	54.6	9.6	100	554
Vegetable plants	52.4	37.3	10.3	100	552
House plants	12.6	64.6	22.8	100	492
Shrubs and/or trees	22.6	66.7	10.7	100	532
Chemicals and/or sprays	27.1	62.1	10.7	100	560
Fertilizers	34.7	59.2	6.1	100	576

Table A.6

Q.6 (cont.)

(b) Regional Analysis

i) Bulbs

	Auck.	P.Nth	Chch.	Inver.	Total
	%	%	%	%	%
Often	14.7	7.5	12.6	20.4	14.2
Occasionally	56.3	72.5	70.3	68.8	64.1
Never	29.0	20.0	17.1	10.8	21.7
	100	100	100	100	100
No. of Respondents	231	80	111	93	515

Table A.7

ii) Flower seeds

	Auck.	P.Nth	Chch.	Inver.	Total
	%	%	%	%	%
Often	16.0	7.4	16.0	20.7	15.4
Occasionally	53.3	76.5	64.2	55.2	59.7
Never	30.7	16.0	19.8	24.1	24.8
	100	100	100	100	100
No. of Respondents	225	81	106	87	499

Table A.8

iii) Lawn seed

	Auck.	P.Nth	Chch.	Inver.	Total
	%	%	%	%	%
Often	3.7	2.6	7.8	0.0	3.8
Occasionally	56.2	65.8	70.9	79.7	64.8
Never	40.1	31.6	21.4	20.3	31.4
	100	100	100	100	100
No. of Respondents	217	76	103	79	475

Table A.9

iv) Flower plants

	Auck.	P.Nth	Chch.	Inver.	Total
	%	%	%	%	%
Often	30.6	34.4	42.1	41.9	35.7
Occasionally	56.3	56.7	50.8	52.7	54.5
Never	13.1	8.9	6.3	5.4	9.6
	100	100	100	100	100
No. of Respondents	245	90	126	93	554

Table A.10

v) Vegetable plants

	Auck.	P.Nth	Chch.	Inver.	Total
	%	%	%	%	%
Often	43.9	50.0	61.3	63.9	52.4
Occasionally	41.8	40.4	31.5	30.9	37.3
Never	14.3	9.6	7.3	5.2	10.3
	100	100	100	100	100
No. of Respondents	237	94	124	97	552

Table A.11

vi) Houseplants

	Auck.	P.Nth	Chch.	Inver.	Total
	%	%	%	%	%
Often	14.5	8.8	13.7	9.6	12.6
Occasionally	64.3	72.5	56.9	67.5	64.6
Never	21.1	18.8	29.4	22.9	22.8
	100	100	100	100	100
No. of Respondents	227	80	102	83	492

Table A.12

vii) Shrubs and/or Trees

	Auck.	P.Nth	Chch.	Inver.	Total
Often	25.8	13.9	22.7	21.1	22.6
Occasionally	61.9	68.4	70.6	73.3	66.7
Never	12.3	17.7	6.7	5.6	10.7
	100	100	100	100	100
No. of Respondents	244	79	119	90	532

Table A.13

viii) Chemicals and/or Sprays

	Auck. %	P.Nth %	Chch. %	Inver. %	Total %
Often	24.0	28.6	30.9	29.3	27.1
Occasionally	61.4	62.6	59.3	67.4	62.1
Never	14.6	8.8	9.8	3.3	10.7
	100	100	100	100	100
No. of Respondents	254	91	123	92	560

Table A.14

ix) Fertilizers

	Auck. %	P.Nth %	Chch. %	Inver. %	Total %
Often	33.8	33.0	34.1	39.4	34.7
Occasionally	60.0	60.6	59.3	55.6	59.2
Never	6.2	6.4	6.5	5.1	6.1
	100	100	100	100	100
No. of Respondents	260	94	123	99	576

Table A.15

Q.7 Approximately how much did your family spend on each of the following in 1975?

(a) Total

	Nil %	\$1-10 %	\$11-20 %	\$21-50 %	\$51-100 %	\$100+ %	No. Respondents
House plants	38.6	46.7	11.0	3.1	0.6	-	510
Bulbs, seeds	16.8	72.7	7.8	2.5	0.2	-	524
Vegetable and/or Flower plants	6.3	62.8	23.8	6.5	0.5	-	554
Shrubs and/or Trees	23.7	28.5	23.5	15.7	7.0	1.6	498
Chemicals, Sprays Fertilizers	9.9	66.9	18.1	4.4	0.5	0.2	565
Garden Tools, Furniture	35.7	34.3	16.7	7.9	2.8	2.6	496

Table A.16

(b) Regional Analysis

i) Houseplants

	Auck. %	P.Nth %	Chch. %	Inver. %	Total %
0	35.9	41.4	43.0	37.8	38.6
\$1-10	46.2	46.0	46.7	48.8	46.7
\$11-20	12.0	10.3	8.4	12.2	11.0
\$21-50	5.1	1.1	1.9	1.2	3.1
\$51-100	0.9	1.1	0	0	0.6
\$100+	0	0	0	0	0
	100	100	100	100	100
No. of Respondents	234	87	107	82	510

Table A.17

ii) Bulbs and/or Seeds

	Auck.	P.Nth	Chch.	Inver.	Total
	%	%	%	%	%
0	20.3	14.0	17.7	9.7	16.8
$1-10	72.0	82.6	70.8	67.7	72.7
$11-20	5.6	2.3	8.8	17.2	7.8
$21-50	1.7	1.2	2.7	5.4	2.5
$51-100	0.4	0	0	0	0.2
$100+	0	0	0	0	0
	100	100	100	100	100
No. of Respondents	232	86	113	93	524

Table A.18

iii) Vegetable and/or Flower Plants

	Auck.	P.Nth	Chch.	Inver.	Total
	%	%	%	%	%
0	10.3	4.3	3.3	2.1	6.3
$1-10	62.8	67.0	67.5	52.6	62.8
$11-20	21.9	28.7	17.1	32.6	23.8
$21-50	4.5	0	10.6	12.6	6.5
$51-100	0.4	0	1.6	0	0.5
$100+	0	0	0	0	0
	100	100	100	100	100
No. of Respondents	242	94	123	95	554

Table A.19

iv) Shrubs and/or Trees

	Auck.	P.Nth	Chch.	Inver.	Total
	%	%	%	%	%
0	22.5	28.8	20.4	26.2	23.7
$1-10	26.0	32.5	34.0	25.0	28.5
$11-20	25.1	23.8	23.3	19.0	23.5
$21-50	17.7	10.0	12.6	19.0	15.7
$51-100	7.8	3.8	8.7	6.0	7.0
$100+	0.9	1.3	1.0	4.8	1.6
	100	100	100	100	100
No. of Respondents	231	80	103	84	498

Table A.20

v) Chemicals, Sprays and/or Fertilisers

	Auck.	P.Nth	Chch.	Inver.	Total
	%	%	%	%	%
0	12.4	11.6	8.1	4.2	9.9
$1-10	63.3	65.3	75.0	67.4	66.9
$11-20	18.7	18.9	12.1	23.2	18.1
$21-50	4.8	3.2	4.0	5.3	4.4
$51-100	0.4	1.1	0.8	0	0.5
$100+	0.4	0	0	0	0.2
	100	100	100	100	100
No. of Respondents	251	95	124	95	565

Table A.21

vi) Garden Tools and Furniture

	Auck.	P.Nth	Chch.	Inver.	Total
	%	%	%	%	%
0	36.8	40.5	32.4	32.1	35.7
$1-10	27.8	33.3	39.8	45.7	34.3
$11-20	20.2	19.0	12.0	11.1	16.7
$21-50	9.0	3.6	7.4	9.9	7.9
$51-100	3.6	1.2	4.6	0.0	2.8
$100+	2.7	2.4	3.7	1.2	2.6
	100	100	100	100	100
No. of Respondents	223	84	108	81	496

Table A.22

Q.8 (a) Overall, compared with 1974, was this total expenditure....

	Auck.	P.Nth	Chch.	Inver.	Total
	%	%	%	%	%
More	31.6	29.3	29.1	33.3	30.9
Less	15.2	15.2	11.9	11.8	13.9
About the same	48.3	51.5	56.0	53.9	51.5
Don't know	4.9	4.0	3.0	1.0	3.7
	100	100	100	100	100
No. of Respondents	263	99	134	102	598

Table A.23

Q.8 (b) Reasons Expenses More.

	Auck.	P.Nth	Chch.	Inver.	Total
	%	%	%	%	%
New House	6.2	17.4	6.7	10.0	8.8
Planted more trees, etc.	9.2	21.7	6.7	20.0	12.8
Higher prices	30.8	17.4	40.0	40.0	32.4
Bought capital item (e.g. mower)	10.8	13.0	16.7	13.3	12.8
Expansion and development of section	24.6	30.4	23.3	13.3	23.0
Other	18.5	0	6.7	3.3	10.1
	100	100	100	100	100
No. of Respondents	65	23	30	30	148

Table A.24

Q.8 (c) Reasons Expenses Less.

	Auck.	P.Nth	Chch.	Inver.	Total
	%	%	%	%	%
Completed development	59.0	21.4	28.6	20.0	41.6
Not enough time	2.6	7.1	0	20.0	5.2
Ill health	7.7	7.1	7.1	0	6.5
Rising prices	0	0	21.4	0	3.9
Smaller garden	10.3	0	7.1	0	6.5
Completed special project	15.4	28.6	21.4	30.0	20.8
Other	5.1	35.7	14.2	30.0	15.6
	100	100	100	100	100
No. of Respondents	39	14	14	10	77

Table A.25

Q.9 When you buy plants, shrubs, or trees, where have you mainly obtained the information about what you buy?

	Auck.	P.Nth	Chch.	Inver.	Total
	%	%	%	%	%
Advice at place of purchase	44.0	44.8	46.3	51.0	45.8
Advice from friends and acquaintences	14.9	19.8	19.4	19.0	17.4
Advice of professional landscaper	1.9	2.1	4.5	3.0	2.7
Books or newspaper articles	30.6	28.1	14.9	16.0	24.2
Radio/TV gardening programmes	1.5	3.1	5.2	4.0	3.0
Advertisements	3.0	0	4.5	0	2.3
Experience	3.7	2.1	4.5	3.0	3.5
Other	0.4	0	0.7	4.0	1.1
	100	100	100	100	100
No. of Respondents	268	96	134	100	598

Table A.26

Q.10 How close do you live to the retail gardening outlet you most often use?

	Auck.	P.Nth	Chch.	Inver.	Total
	%	%	%	%	%
Within 1 mile	33.3	35.4	37.2	36.6	35.1
1-5 miles	56.3	62.6	56.9	61.4	58.3
6-10 miles	7.4	2.0	5.1	2.0	5.1
11-20 miles	1.5	0	0	0	0.7
20+ miles	1.1	0	0.7	0	0.7
Other (wholesale)	0.4	0	0	0	0.2
	100	100	100	100	100
No. of Respondents	270	99	137	101	607

Table A.27

Q.11 Where do you usually go to buy the following?

(a) Totals only

	House Plants	Bulbs & Seeds	Veg & Flower Plants	Trees & Shrubs	Fert. & Chem.	G.Tools & Ornamts
	%	%	%	%	%	%
Garden Centre and/or Nursery	89.4	70.9	85.5	97.8	73.5	25.7
Hardware Store	2.4	6.7	3.6	0.6	13.5	60.9
Supermarket	5.4	14.9	7.0	1.0	7.6	2.0
Department Store	2.1	5.0	2.9	0.4	3.4	9.8
Mail Order	0	2.1	0.4	0.2	0	0.2
Wholesale	0.2	0.2	0	0	1.0	0.9
Other	0.5	0.2	0.6	0	1.0	0.4
	100	100	100	100	100	100
No. of Respondents	425	478	525	492	524	448

(b) Regional Analysis

Table A.28

i) Houseplants

	Auck.	P.Nth	Chch.	Inver.	Total
	%	%	%	%	%
Garden Centre and/ or Nursery	86.8	91.8	88.4	95.7	89.4
Hardware Store	1.5	0	7.0	1.4	2.4
Supermarket	8.1	4.1	3.5	1.4	5.4
Department Store	2.5	4.1	1.2	0	2.1
Mail Order	0	0	0	0	0
Wholesale	0	0	0	1.4	0.2
Other	1.0	0	0	0	0.5
	100	100	100	100	100
No. of Respondents	197	73	86	69	425

Table A.29

ii) Bulbs and Seeds

	Auck.	P.Nth	Chch.	Inver.	Total
	%	%	%	%	%
Garden Centre and/or Nursery	68.5	77.8	63.1	80.2	70.9
Hardware Store	2.5	6.2	17.1	3.5	6.7
Supermarket	18.0	11.1	14.4	11.6	14.9
Department Store	8.0	3.7	2.7	2.3	5.0
Mail Order	2.0	1.2	2.7	2.3	2.1
Wholesale	0.5	0	0	0	0.2
Other	0.5	0	0	0	0.2
	100	100	100	100	100
No. of Respondents	200	81	111	86	478

Table A.30

iii) Vegetable and Flower Plants

	Auck.	P.Nth	Chch.	Inver.	Total
	%	%	%	%	%
Garden Centre and/or Nursery	80.3	87.1	85.3	96.8	85.5
Hardware Store	2.2	6.5	6.9	0	3.6
Supermarket	11.2	4.3	5.2	2.2	7.0
Department Store	4.5	2.2	2.6	0	2.9
Mail Order	0.4	0	0	1.1	0.4
Wholesale	0	0	0	0	0
Other	1.3	0	0	0	0.6
	100	100	100	100	100
No. of Respondents	223	93	116	93	525

Table A.31

iv) Trees and Shrubs

	Auck.	P.Nth	Chch.	Inver.	Total
	%	%	%	%	%
Garden Centre and/or Nursery	98.3	97.1	95.5	100.0	97.8
Hardware Store	0	1.5	1.8	0	0.6
Supermarket	1.3	0	1.8	0	1.0
Department Store	0.4	0	0.9	0	0.4
Mail Order	0	1.5	0	0	0.2
Wholesale	0	0	0	0	0
Other	0	0	0	0	0
	100	100	100	100	100
No. of Respondents	231	68	111	82	492

Table A.32

v) Fertilizers and Chemicals

	Auck.	P.Nth	Chch.	Inver.	Total
	%	%	%	%	%
Garden Centre and/or Nursery	72.2	75.0	63.5	87.9	73.5
Hardware Store	8.5	16.7	26.1	7.7	13.5
Supermarket	13.2	1.2	6.1	1.1	7.6
Department Store	3.8	6.0	3.5	0	3.4
Mail Order	0	0	0	0	0
Wholesale	1.3	1.2	0	1.1	1.0
Other	0.9	0	0.9	2.2	1.0
	100	100	100	100	100
No. of Respondents	234	84	115	91	524

Table A.33

vi) Garden Tools/Ornaments

	Auck.	P.Nth	Chch.	Inver.	Total
	%	%	%	%	%
Garden Centre and/or Nursery	23.3	18.9	20.2	46.6	25.7
Hardware Store	59.4	66.2	67.7	50.7	60.9
Supermarket	1.5	2.7	3.0	1.4	2.0
Department Store	13.9	8.1	9.1	1.4	9.8
Mail Order	0	1.4	0	0	0.2
Wholesale	1.5	1.4	0	0	0.9
Other	0.5	1.4	0	0	0.4
	100	100	100	100	100
No. of Respondents	202	74	99	73	448

Table A.34

Q.12 Considering ALL your garden requirements .... which two of the following do you consider most important?

	Auck.	P.Nth	Chch.	Inver.	Total
	%	%	%	%	%
Service given	16.1	20.3	20.2	24.7	19.2
Wide selection	25.9	30.8	26.2	23.2	26.3
Quality of Merchandise	32.9	29.1	30.6	29.5	31.2
Price	12.7	11.5	8.7	7.4	10.7
Shop location	4.6	3.3	4.4	4.7	4.4
Hours	4.0	2.2	2.4	6.8	3.8
Appearance of centre	0	0	1.6	0	0.4
Parking	3.2	2.7	4.4	3.7	3.5
Other	0.6	0	1.6	0	0.6
	100	100	100	100	100
No. of Respondents	498	182	252	190	1122

Table A.35

Q.13 Considering ALL requirements, which type of retail outlet has....?

(a) Totals Only

	Widest Selection	Best Service	Highest Quality	Lower Price	Most Useful Advice	Easiest Access
	%	%	%	%	%	%
Garden Centre and/or Nursery	96.7	86.9	95.6	40.9	96.0	78.2
Hardware Store	0.5	6.7	1.3	3.5	2.5	4.0
Supermarket	1.4	3.4	1.0	43.5	0.6	14.8
Department Store	1.0	1.9	1.1	11.0	0.8	2.3
Mail Order	0.3	1.0	1.0	1.2	0.2	0.8
Other	0	0.2	0	0	0	0
	100	100	100	100	100	100
No. of Respondents	579	525	526	492	525	528

(b) Regional Analysis

Table A.36

i) Best Service

	Auck.	P.Nth	Chch.	Inver.	Total
	%	%	%	%	%
Garden Centre and/or Nursery	88.4	82.6	82.2	93.4	86.9
Hardware Store	4.5	10.9	10.2	3.3	6.7
Supermarket	5.8	0	4.2	0	3.4
Department Store	0.9	4.3	2.5	1.1	1.9
Mail Order	0.4	2.2	0.8	1.1	1.0
Other	0	0	0	1.1	0.2
	100	100	100	100	100
No. of Respondents	224	92	118	91	525

Table A.37

ii) Lowest Price

	Auck.	P.Nth	Chch.	Inver.	Total
	%	%	%	%	%
Garden Centre and/or Nursery	33.8	23.2	48.2	66.7	40.9
Hardware Store	0.9	4.9	7.3	3.6	3.5
Supermarket	50.0	56.1	33.6	27.4	43.5
Department Store	13.4	14.6	10.9	1.2	11.0
Mail Order	1.9	1.2	0	1.2	1.2
Other	0	0	0	0	0
	100	100	100	100	100
No. of Respondents	216	82	110	84	492

Table A.38

iii) Easiest Access

	Auck.	P.Nth	Chch.	Inver.	Total
	%	%	%	%	%
Garden Centre and/or Nursery	69.2	86.2	81.6	89.2	78.2
Hardware Store	3.8	5.7	6.1	0	4.0
Supermarket	23.9	4.6	8.8	8.6	14.8
Department Store	2.1	3.4	3.5	0	2.3
Mail Order	0.9	0	0	2.2	0.8
Other	0	0	0	0	0
	100	100	100	100	100
No. of Respondents	234	87	114	93	528

Table A.39

iv) Widest Selection

	Auck. %	P.Nth %	Chch. %	Inver. %	Total %
Garden Centre and/or Nursery	97.7	95.9	92.9	100	96.7
Hardware Store	0	1.0	1.6	0	0.5
Supermarket	1.6	0	3.1	0	1.4
Department Store	0.8	3.1	0.8	0	1.0
Mail Order	0	0	1.6	0	0.3
Other	0	0	0	0	0
	100	100	100	100	100
No. of Respondents	257	97	127	98	579

Table A.40

v) Highest Quality

	Auck. %	P.Nth %	Chch. %	Inver. %	Total %
Garden Centre and/or Nursery	98.7	92.2	91.2	96.7	95.6
Hardware Store	0.4	2.2	2.6	1.1	1.3
Supermarket	0.9	0	2.6	0	1.0
Department Store	0	3.3	1.8	1.1	1.1
Mail Order	0	2.2	1.8	1.1	1.0
Other	0	0	0	0	0
	100	100	100	100	100
No. of Respondents	230	90	114	92	526

Table A.41

vi) Most Useful Advice

	Auck. %	P.Nth %	Chch. %	Inver. %	Total %
Garden Centre and/or Nursery	97.4	95.3	91.5	98.9	96.0
Hardware Store	1.3	2.4	6.0	1.1	2.5
Supermarket	0.4	1.2	0.9	0	0.6
Department Store	0.4	1.2	1.7	0	0.8
Mail Order	0.4	0	0	0	0.2
Other	0	0	0	0	0
	100	100	100	100	100
No. of Respondents	231	85	117	92	525

Table A.42

Q.14 During the past year, did you buy plants (excluding cut flowers) as a gift for any of the following occasions.

	Auck.	P.Nth	Chch.	Inver.	Total
	%	%	%	%	%
Did not buy	42.4	38.5	38.0	39.3	40.2
Christmas	17.2	12.0	16.7	17.0	16.1
Mothers Day	16.2	17.9	15.3	21.4	17.2
Anniversary	11.1	11.1	18.7	8.0	12.3
Birthday	5.7	9.4	2.7	6.3	5.8
Gifts	3.4	3.4	4.7	3.6	3.7
Hospital and sickness	2.7	7.7	2.7	0.9	3.3
Other	1.4	0	1.3	3.6	1.5
	100	100	100	100	100
No. of Respondents	297	117	150	112	676

Table A.43

Q.15 (a) How often did you give Gift Vouchers last year?

	Auck.	P.Nth	Chch.	Inver.	Total
	%	%	%	%	%
Once	70.5	63.6	77.1	62.9	69.5
2-5 times	27.3	31.8	20.0	33.3	27.3
More than 5 times	2.3	4.5	2.9	3.7	3.1
	100	100	100	100	100
No. of Respondents	44	22	35	27	128

Table A.44

(b) Reasons for not buying.

	Auck.	P.Nth	Chch.	Inver.	Total
	%	%	%	%	%
Did not think	22.9	24.2	22.7	29.0	24.2
	34.1	24.2	18.2	12.9	25.8
Occasion did not arise	10.6	12.9	22.7	14.5	13.9
Sooner give other things	23.5	21.0	25.8	24.2	23.6
Other	8.8	17.7	10.6	19.4	12.5
	100	100	100	100	100
No. of Respondents	170	62	66	62	360

Table A.45

Q.16 (a) Have you seen this symbol? (NZNA)

	Auck.	P.Nth	Chch.	Inver.	Total
	%	%	%	%	%
Yes	48.7	66.0	73.1	59.6	58.7
No	40.6	19.1	18.5	27.7	30.1
Don't know	10.7	14.9	8.5	12.8	11.2
	100	100	100	100	100
No. of Respondents	261	94	130	94	579

Table A.46

(b) What do the initials NZNA stand for?

	Auck.	P.Nth	Chch.	Inver.	Total
	%	%	%	%	%
Answered correctly	55.9	66.7	64.6	58.0	60.0
Incorrect	30.7	13.6	15.2	22.2	22.9
Don't know	13.4	19.8	20.2	18.5	17.0
	100	100	100	100	100
No. of Respondents	202	81	99	81	463

Table A.47

(c) Is it important to you that your retailer displays this sign?

	Auck.	P.Nth	Chch.	Inver.	Total
	%	%	%	%	%
Yes	32.3	32.9	47.7	51.8	39.5
No	45.5	42.7	32.7	27.7	38.8
Don't know	22.2	24.4	19.6	20.5	21.7
	100	100	100	100	100
No. of Respondents	189	82	107	83	461

Table A.48

Q.16 (d) Reasons for Considering Sign Important.

	Auck.	P.Nth	Chch.	Inver.	Total
Sign means	%	%	%	%	%
Quality/Guarantee	64.2	50.0	69.2	60.0	62.1
Professional Advice	11.3	11.5	7.7	17.1	11.8
Reliability Confidence	11.3	11.5	10.2	8.6	10.5
Qualified nurserymen	9.4	19.2	7.7	14.3	11.8
Other	3.8	7.7	5.1	0	3.9
	100	100	100	100	100
No. of Respondents	53	26	39	35	153

Table A.49

(e) Reasons for Considering Sign Unimportant.

	Auck.	P.Nth	Chch.	Inver.	Total
	%	%	%	%	%
Interested only in product/price	56.9	33.3	56.0	52.4	52.3
Not necessarily proof of quality	7.7	14.3	8.0	4.8	8.3
Staff/Service preferred to sign	15.4	38.1	20.0	19.0	20.5
NZNA means little	20.0	14.3	16.0	23.8	18.9
	100	100	100	100	100
No. of Respondents	65	21	25	21	132

Table A.50

Q.17 Is there any way you would like to see your garden retailer improve his service?

		Auck.	P.Nth	Chch.	Inver.	Total
		%	%	%	%	%
1.	No	34.5	40.0	41.4	43.2	38.4
2.	Service satisfactory	18.5	25.3	18.4	28.4	21.4
3.	Improved quality	1.5	0	1.1	1.2	1.1
4.	Lower prices	6.5	8.0	2.3	2.5	5.2
5.	Wider selection	5.5	0	4.6	2.5	3.8
6.	Better information on choice/general	3.5	6.7	6.9	1.2	4.3
7.	Better information on fertilizers/ growing	2.5	1.3	1.1	3.7	2.3
8.	Better information on pest/weed control	0.5	0	3.4	1.2	1.1
9.	Better information on landscaping	2.5	0	2.3	1.2	1.8
10.	Better information on planting and spraying	1.5	1.3	0	1.2	1.1
11.	Better and cheaper seeds	2.5	0	2.3	0	1.6
12.	Better/politer service	5.5	0	1.1	3.7	3.4
13.	Better advertising	0.5	2.7	2.3	0	1.1
14.	Longer hours at weekend	2.0	1.3	0	0	1.1
15.	More knowledgeable staff	2.0	4.0	2.3	1.2	2.3
16.	Delivery service	1.5	1.3	2.3	1.2	1.6
17.	More parking space	0.5	1.3	2.3	0	0.5
18.	Better labelling	2.5	1.3	0	1.2	2.0
19.	Better layout	1.0	1.3	2.3	1.2	0.9
20.	Other	5.0	3.9	5.6	4.9	5.1
		100	100	100	100	100
	No. of Respondents	268	75	87	81	443

MARKET RESEARCH CENTRE

Massey University

SURVEY OF GARDEN PLANTS AND MATERIAL USAGE

1976

OFFICE USE ONLY

1/

5/

1. Do you live in (TICK ONE) — 6
   - your own house ☐ 1
   - your own flat ☐ 2
   - a rented house ☐ 3
   - a rented flat ☐ 4
   - Other ______________ (specify)

2. At your dwelling, do you have (TICK ALL THAT APPLY) — 7-12
   - lawns ☐
   - vegetable and/or flower plants ☐
   - shrubs and/or trees ☐
   - house plants ☐
   - plants in tubs, pots or boxes ☐
   - garden furniture and/or ornaments ☐

IF NONE OF THE ABOVE, GO TO QUESTION 15.

3. Who looks after the above items? (TICK ONE) — 13
   - self ☐
   - gardener ☐
   - landlord ☐
   - Other ______________ (specify)

THE FOLLOWING QUESTIONS SHOULD BE ANSWERED BY THE PERSON IN YOUR HOUSEHOLD WHO DOES THE MOST GARDENING.

4. Why do you garden? (RANK BY ORDER OF IMPORTANCE IN THE BOXES PROVIDED)

   (1) to improve or maintain the appearance of the house.
   (2) for enjoyment, hobby, etc.
   (3) for exercise.
   (4) for provision of fruit, vegetables and flowers.
   (5) because your landlord requires you to.
   (6) Other ______________ (specify)

   14-19

5. Do you a) make cuttings from mature plants to grow new plants? (TICK ONE)

Often	Occasionally	Never
☐	☐	☐

   20 ☐

   b) get mature plants from friends/acquaintances, etc.?

Often	Occasionally	Never
☐	☐	☐

   21 ☐

OFFICE USE ONLY

6. Which of the following do you buy for your garden (both indoor and/or outdoor), either often, occasionally or never? (TICK AS MANY AS APPLY)

	Often	Occasionally	Never
Bulbs	☐	☐	☐
Flower seeds	☐	☐	☐
Lawn seed	☐	☐	☐
Flower plants	☐	☐	☐
Vegetable plants	☐	☐	☐
House plants	☐	☐	☐
Shrubs and/or trees	☐	☐	☐
Chemicals and/or sprays	☐	☐	☐
Fertilisers	☐	☐	☐

22

7. Approximately how much did your family spend on each of the following in 1975? (TICK NEAREST AMOUNT)

	Nil	$1 to $10	$11 to $20	$21 to $50	$51 to $100	More than $100
House plants	☐	☐	☐	☐	☐	☐
Bulbs and/or seeds	☐	☐	☐	☐	☐	☐
Vegetable and/or flower plants	☐	☐	☐	☐	☐	☐
Shrubs and/or trees	☐	☐	☐	☐	☐	☐
Chemicals, sprays and/or fertiliser	☐	☐	☐	☐	☐	☐
Garden tools and/or furniture	☐	☐	☐	☐	☐	☐

31

8. Overall, compared with 1974, was this expenditure -

More ☐

Less ☐

About the same ☐

Don't know ☐

If more or less, why ? ______________________

____

37

9. When you buy plants, shrubs or trees, where have you mainly obtained the information about what you buy? (TICK ONE ONLY)

Advice at place of purchase ☐

Advice from friends or acquaintances ☐

Advice of professional landscaper ☐

Books or newspaper articles ☐

Radio/TV gardening programmes ☐

Advertisements ☐

Other ______________________
(specify)

40

OFFICE USE ONLY

10. How close do you live to the retail gardening outlet which you most often use?

Within 1 mile	☐	42 ☐
1-5 miles	☐	
6-10 miles	☐	
11-20 miles	☐	
More than 20 miles	☐	

Other ______________________ (specify)

11. Where do you usually go to buy the following? (TICK ONE PER COLUMN)

	House plants	Bulbs & seeds	Vegetable & flower plants	Trees & shrubs	Fertiliser & chemicals	Garden tools & ornaments	43
Garden Centre and/or nursery	☐	☐	☐	☐	☐	☐	☐
Hardware store	☐	☐	☐	☐	☐	☐	☐
Supermarket	☐	☐	☐	☐	☐	☐	☐
Department store	☐	☐	☐	☐	☐	☐	☐
Mail order	☐	☐	☐	☐	☐	☐	☐
Other ____________ (specify)	☐	☐	☐	☐	☐	☐	☐
Don't purchase	☐	☐	☐	☐	☐	☐	

12. Considering ALL your garden requirements (seeds, plants, shrubs, chemicals, etc.) which of the following do you consider most important for a RETAIL OUTLET? (TICK NO MORE THAN TWO(2).)

Service given	☐	48 ☐☐ ☐☐
Wide selection	☐	
Quality of merchandise	☐	
Prices	☐	
Location of shop	☐	
Hours of shopping	☐	
Appearance of shop	☐	
Parking convenience	☐	

Other ______________________ (specify)

13. Considering ALL of your garden requirements which type of retail outlet do you consider has... (TICK ONE ONLY IN EACH COLUMN)

	Widest Selection	Best Service	Highest Quality	Lowest Price	Most Useful Advice	Easiest Access	52
Garden Centre and/or nursery	☐	☐	☐	☐	☐	☐	☐
Hardware store	☐	☐	☐	☐	☐	☐	☐
Supermarket	☐	☐	☐	☐	☐	☐	☐
Department store	☐	☐	☐	☐	☐	☐	☐
Mail order	☐	☐	☐	☐	☐	☐	☐
							☐

OFFICE USE ONLY

14. During the past year, did you buy plants (excluding cut flowers) as a gift for any of the following occasions?
(TICK AS MANY AS APPLY) 58

- Did not buy ☐
- Christmas ☐
- Mother's Day ☐
- Anniversary ☐
- Other ______________ (specify)

15. How often did you give plant gift vouchers last year? 60

- Once ☐
- 2-5 times ☐
- More than 5 times ☐
- Never ☐ —> Why not?

____

16. a) Have you seen this symbol?

- Yes ☐
- No ☐
- Don't know ☐

b) What do the initials NZNA stand for?

____

IF YOU HAVE SEEN THIS SYMBOL,

c) Is it important to you that your retailer displays this sign? 62

YES ☐ NO ☐ DON'T KNOW ☐

Why or Why not? ______________ 64

____

17. Is there any way you would like to see your garden retailer improve his service to you? 66

____

____

WE REQUIRE THE FOLLOWING INFORMATION ABOUT THE PERSON WHO COMPLETED THIS QUESTIONNAIRE FOR STATISTICAL ANALYSIS ONLY.

Sex: Male ☐ Female ☐ 67

Age: Less than 19 ☐ 20-39 ☐ 40-59 ☐ 60+ ☐ 68

What is the main occupation of the head of your household ______________ 69

What is the approximate gross annual income of the head of your household? 71

- Less than $3,000 ☐
- $3,001 to $5,000 ☐
- $5,001 to $10,000 ☐
- $10,001 to $15,000 ☐
- $15,001 or more ☐

THANK YOU FOR YOUR COOPERATION