Gardens

THE WEST OF SCOTLAND AGRICULTURAL COLLEGE

GARDEN CENTRES AND THEIR CUSTOMERS

A student project aimed at assessing some of the factors affecting customers' opinions of four Garden Centres in the West of Scotland

by

A. S. HORSBURGH

and

J. B. R. ANDERSON

Auchincruive
Ayr KA6 5HW

Report No. 145
October, 1973

28

FOREWORD

This Survey was undertaken by students of the West of Scotland Agricultural College as a part of the work of the Business Studies section of their course for the Ordinary National Diploma in Amenity Horticulture. It was supervised by Mr A S Horsburgh of the Economics Division of the College with the assistance of two horticultural advisers, Messrs J B R Anderson and I G Walls, and Miss L W Dick of this Department.

Although the study had limited objectives, it is hoped that the publication of its results will serve to encourage similar co-operative investigational work in the future. Students and teachers alike stand to gain by exercises of this kind. Students gain primarily by achieving a closer identification with real problems of management, whilst both teaching and learning become more interesting and enjoyable when there are opportunities to analyse and discuss original data and draw conclusions related to truly commercial situations.

Ability to conduct such exercises naturally depends on the goodwill of members of the horticultural industry who are willing to co-operate. The help of all who took part in the present work is most gratefully acknowledged by the College. It is hoped that they will gain something from the findings and that owners and managers of Nursery Stock and Garden Centre businesses in a wider sphere will find items of interest in this report.

CONWAY A WOOD
Head of Department of
Horticulture and Beekeeping

ACKNOWLEDGEMENTS

Grateful acknowledgement is made to the four Garden Centre owners for allowing this project to be carried out and for their many helpful suggestions. Thanks are due also to the customers for their patience in answering the questions.

The authors would also like to express their appreciation of the work done by the four students - Michael Dooner, Gregor Harrison, Mervyn Kessell and Gordon Walker - in conducting the interviews and analysing the results. Assistance from College colleagues is also gratefully acknowledged, particularly that of I G Walls who initiated the project, of Miss L W Dick who helped with the field work and of A Grieve who helped with the questionnaire.

LIST OF FIGURES AND TABLES

		Page
Fig. 1	Distances travelled by customers to Garden Centres	4
Fig. 2	Percentage of customers who had made special trips to visit the Garden Centres	5
Fig. 3	Reasons given by customers for visiting the Garden Centres	6
Fig. 4	Frequency of visits by customers to Garden Centres	7
Fig. 5	The extent of customers' loyalty to the Garden Centres as sources of supply of shrubs and plants	8
Fig. 6	The importance of alternative outlets used by customers	9
Fig. 7	Customers' estimated annual expenditure on all garden items	11
Table 1	Estimated annual expenditure of customers at the different Garden Centres	12
Fig. 8	Customers' estimates of cost of establishing a new garden	13
Fig. 9	Factors limiting customers' expenditure on plants and shrubs	14
Fig. 10	Customers' opinions about shrub prices, compared with other consumer items	16
Table 2	Customers' opinions about the prices and quality of shrubs at the Garden Centres compared with other suppliers	17
Fig. 11	Customers' opinions about the importance of various aspects of Garden Centre operations and services	18
Table 3	Customers' opinions of the services provided by the Garden Centres	19
Fig. 12	Customers' 'image' of the Garden Centre owner	20
Fig. 13	Means by which customers first came to know of the Garden Centres	22

CONTENTS

INTRODUCTION	Page
Objectives	1
Details about the Centres	1
Method	2
SECTION 1	
The Importance of Location and its effect on Shopping Habits	3
SUMMARY	8
SECTION 2	
Factors affecting Consumer Expenditure	9
SUMMARY	11
SECTION 3	
Customers' opinions about the price and quality of the shrubs sold and the service provided by Garden Centres	12
SUMMARY	16
SECTION 4	
The Impact of Advertising and other means by which Customers come to know about the Garden Centres	17
CONCLUSIONS	18
APPENDIX - Copy of Questionnaire	19

INTRODUCTION

This report presents the results of a project undertaken in spring 1973 by four students taking the Business Studies section of the course for the Ordinary National Diploma in Amenity Horticulture at the West of Scotland Agricultural College.

Although the survey was fairly limited, both in the number of garden centres surveyed and the number of customers interviewed, it is thought that the results are significant enough to be of interest to a wider circle of garden centre owners and nurserymen who may be concerned with the future of the Nursery Stock industry. It is hoped that it may also provide some pointers to further research and investigation.

The need for such research is apparent when one considers how the garden centre has emerged from a position of relative insignificance some 10 years ago until it is now a major outlet for garden nursery stock, accounting for over 40% of total retail sales in the UK*. Since the garden centre increasingly represents the nursery stock industry in the eyes of the consuming public, it is important to all sections of the industry that it should present an acceptable image.

Objectives

Although the original objective was a fairly narrow one, namely that of assessing the sales and pricing policy at each garden centre, the scope of the survey was in fact broad enough to make it relevant as a study of customers' opinions about garden centres and shrubs in general.

The objectives of the project were:-

1. To determine the importance of location relative to customers' homes, and its effect on shopping habits.

2. To obtain details of customers' expenditure on shrubs, and of the factors affecting the level of expenditure.

3. To obtain customers' opinions of the price and quality of shrubs and of the other services provided by the garden centres.

4. To assess the impact of advertising and other means by which customers come to know of the garden centre.

* "The Future of the Gardening Market" by Peter Konig- <u>Nurseryman and Garden Centre</u> - 6.8.70.

Details about the Centres

Four garden centres were selected for consumer interviews. Two of these were situated on the north side of Glasgow within a few miles of the city boundary, while the other two were located in the Ayr/Prestwick/Troon area some 30-40 miles from the main connurbation of Glasgow and its surrounding suburban areas.

All of the centres were situated in - or within easy distance by car - good class residential areas. One of the centres had a shop on a main road near a main shopping centre. A brief description of the location of each centre is given below:-

CENTRE A	Ayr District; outskirts of residential area; rather difficult access from main road.
CENTRE B	Ayr District; in high class residential area; good access from main road.
CENTRE C	Glasgow District; shop on main road near main shopping centre.
CENTRE D	Glasgow District; short distance from high class residential area; good access from road carrying mainly local traffic.

Method

Consumer interviews were conducted at Centres A and B on Easter Monday, 23rd April 1973 - a Glasgow holiday but not an Ayr holiday, - and on Sunday 29th April. Centres C and D were visited on Monday 30th April - a normal working day. A copy of the questionnaire used is given in the Appendix.

Although it was hoped that a minimum of 50 interviews would be obtained from each centre, this target was achieved at only one centre. The number of customers interviewed at each centre was dependent on:-

1. the number of customers visiting the centre
2. the time taken by each interviewer to complete an interview
3. the amount of time available for interviewing at each centre.

The numbers of completed questionnaires obtained were as follows:-

Centre A	-	34
Centre B	-	51
Centre C	-	29
Centre D	-	6
Total		120

Since time was very limited when the Glasgow centres were being visited, question 7 in the questionnaire was omitted. This made it possible to complete a reasonable number of questionnaires at Centre C. Trade at Centre D, however, was badly affected by the poor weather conditions and only 6 customers were interviewed during the whole afternoon.

In carrying out the interviews, customers leaving the centres were selected at random and no particular pattern of selecting customers was adopted.

SECTION 1 - The importance of location and its effect on Shopping Habits

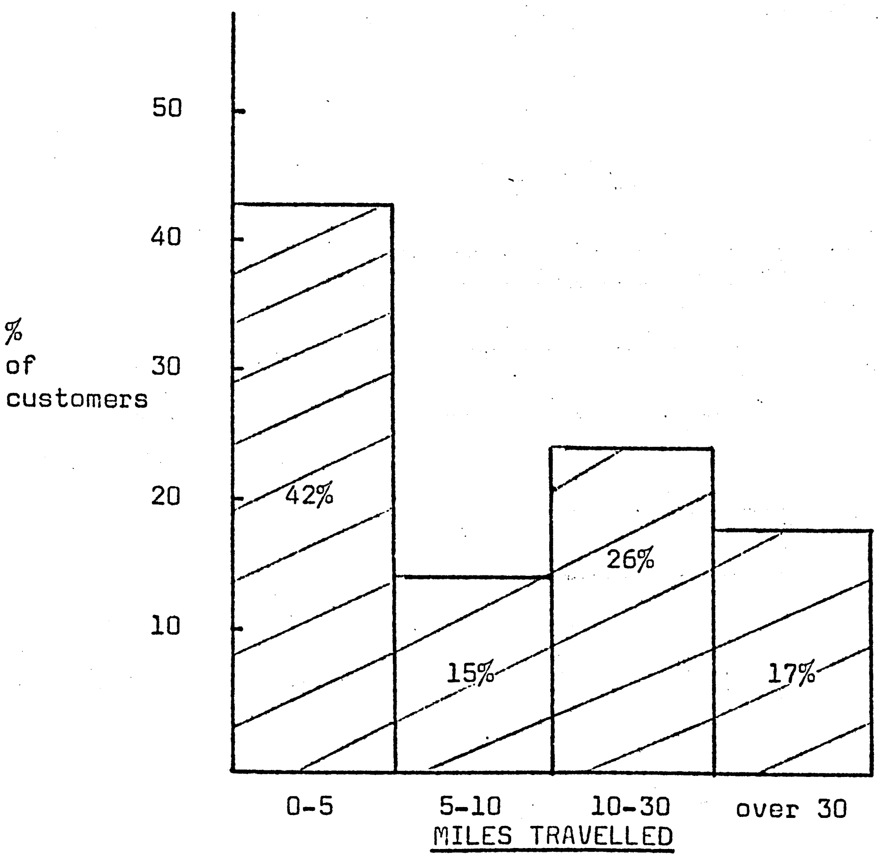
A question of importance for any nurseryman thinking of developing a garden centre is to consider the suitability of his particular location and the effect this could have on the day to day pattern of trade. Prospective garden centre owners need to consider how far customers are prepared to travel and the number of customers they need to attract in order to achieve a reasonable sales turnover figure. They also need to be aware of consumer attitudes and habits with respect to convenience of location, the frequency of shopping and the extent to which customers tend to 'shop around' for their garden supplies.

If customers rate convenience very highly, then a town nursery should be very suitable for development as a garden centre, particularly if located near other shopping areas used by customers. If, on the other hand, customers are prepared to make a special trip to obtain their garden supplies, an out-of-town location with access to a wider trading area might have some advantages.

In order to establish the distances travelled by customers and the trading area covered by the garden centres taking part in the survey, customers were asked to state where they had come from to visit the centres. The results are presented in Figure 1.

FIGURE 1

Distances travelled by customers to Garden Centres



While 57% of the customers interviewed lived within 10 miles of the centre, and 42% within 5 miles, a significant proportion had travelled a considerable distance - as many as 17% over 30 miles and 43% over 10. The average distance travelled by all respondents was 13 miles.

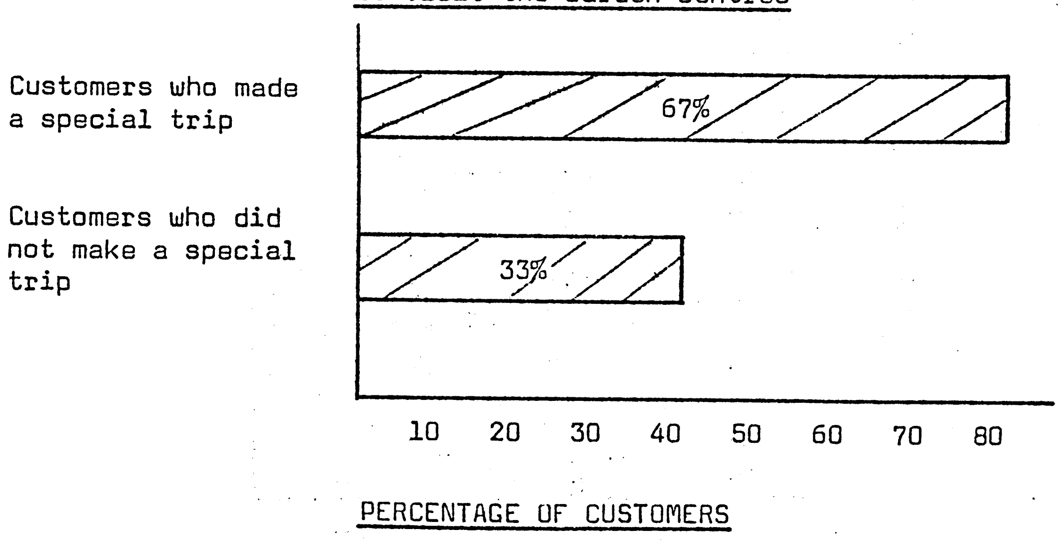
There was some evidence to suggest that the centres on the outskirts of town had a wider trading area than one of the centres (C) which was situated in town near a main shopping area. This centre seemed to rely mainly on local trade, with 70% of the customers interviewed living within a 5-mile radius. Although it is possible that the results at this centre might have been different if the survey had been carried out at a weekend rather than on a Monday, it may be significant that this centre does not open on Sunday (which the other garden centre owners said was their busiest day) and was closed even on Easter Monday - a Glasgow holiday. By comparison, the two Ayr centres had a much wider trading area, drawing 24% of their customers from areas over 30 miles away and 47% from over 10 miles away.

Although customers may travel considerable distances to visit garden centres, it is necessary for garden centre managers to know if customers make special trips to visit the centre or whether it is simply chance which takes them there. If customers do not make special trips to visit garden centres, then perhaps shrubs should be sold through, say, petrol stations or transport cafes, where opportunities for this type of chance sale are likely to be greater on account of the higher traffic volume.

This, however, was not the case in the present survey and about two-thirds of the customers interviewed had made special trips to visit the centres (see Figure 2). There was little variation in the replies given at the different centres.

FIGURE 2

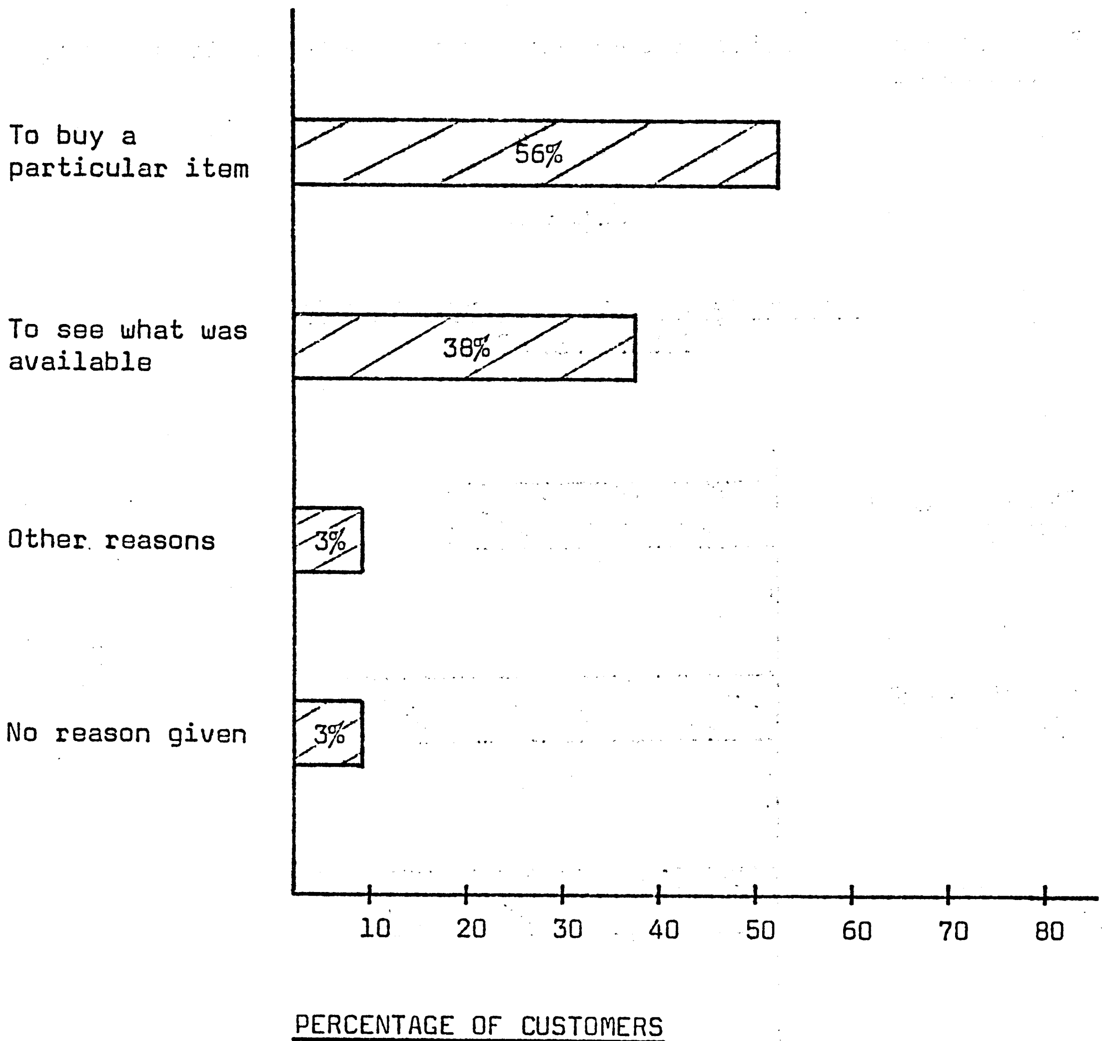
Percentage of customers who had made special trips to visit the Garden Centres



Linked with the question of whether customers make special trips to visit garden centres is that of whether they come to buy a particular item or simply to look around to see what is available. The reasons given by customers for visiting the garden centres are summarised in Figure 3.

FIGURE 3

Reasons given by customers for visiting the Garden Centres



Although the data as a whole show that 56% of the customers interviewed were visiting the centres to buy a particular item, there were some variations in the replies given at the different centres. Thus 70% of the customers interviewed at Centre A had come to buy a particular item, whereas Centre B seemed to attract more casual visitors, with less than 40% coming to buy a particular item.

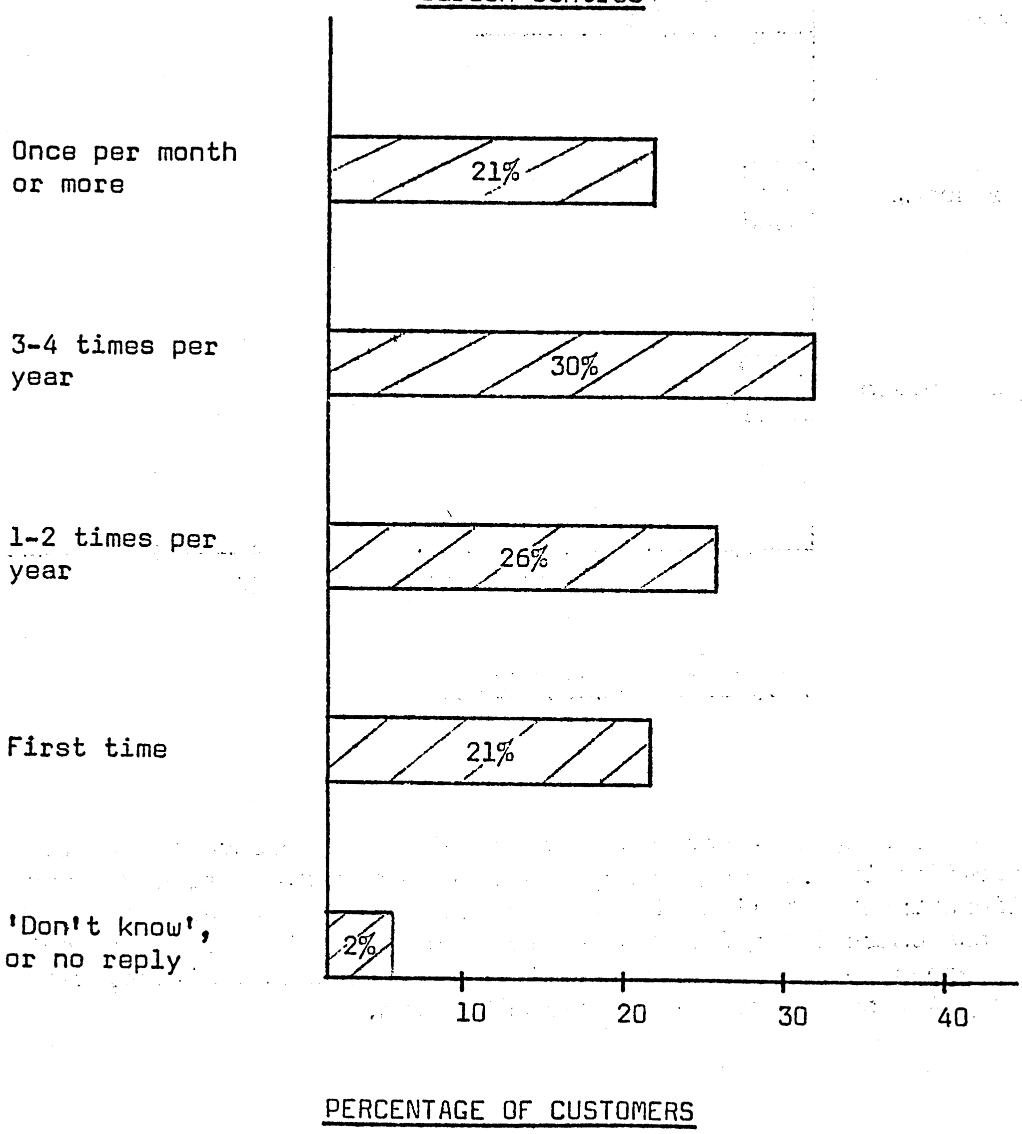
Other reasons for visiting the centres included 'fresh air' and 'an outing for the family'.

The frequency of customers' visits is another point of some importance for garden centre managers. If customers tend to visit garden centres once a month or more, a convenient location is likely to be more important than if visits are made only a few times a year. The length of time between visits is also a point for garden centre managers to consider when planning what stocks of plants and materials should be carried.

The frequency of visits by customers to the garden centres is presented in Figure 4.

FIGURE 4

Frequency of visits by customers to Garden Centres



Overall, only 21% of the customers interviewed visited the centres once a month or more and there was the same percentage of new customers visiting for the first time. The average number of visits by all customers was about 4 per year. Since the majority of customers have only a few contacts with the garden centre during the year, it is desirable that supplies which customers are likely to need several months ahead should be regularly available - or, if this is impossible, reminders of what will be available should be prominently displayed.

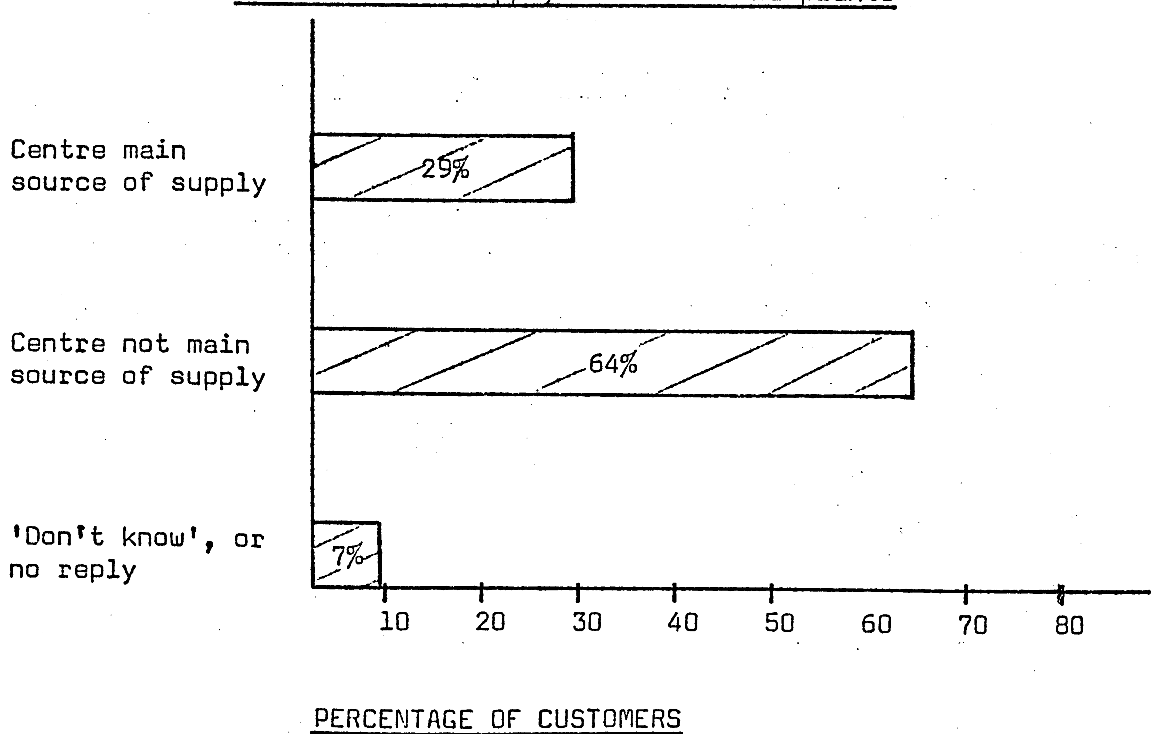
The frequency of visits to the individual centres tended to vary according to the distances travelled. Centre C, with its mainly local clientele, had the highest percentage of regular customers - 35% visiting at least once a month. By comparison, Centre A had only 9% and Centre B 18%, the distances travelled by customers being in both cases much greater.

When a garden centre manager plans his pricing policy and sales promotion, it is useful for him to know the extent of customers' loyalty to the centre. Indeed, one measure of his success as a garden centre manager may well be the number of customers who prefer to do business with him.

The extent of customers' loyalty to the garden centres is illustrated in Figure 5.

FIGURE 5

The extent of customers' loyalty to the Garden Centres as sources of supply of shrubs and plants



SUMMARY OF SECTION 1

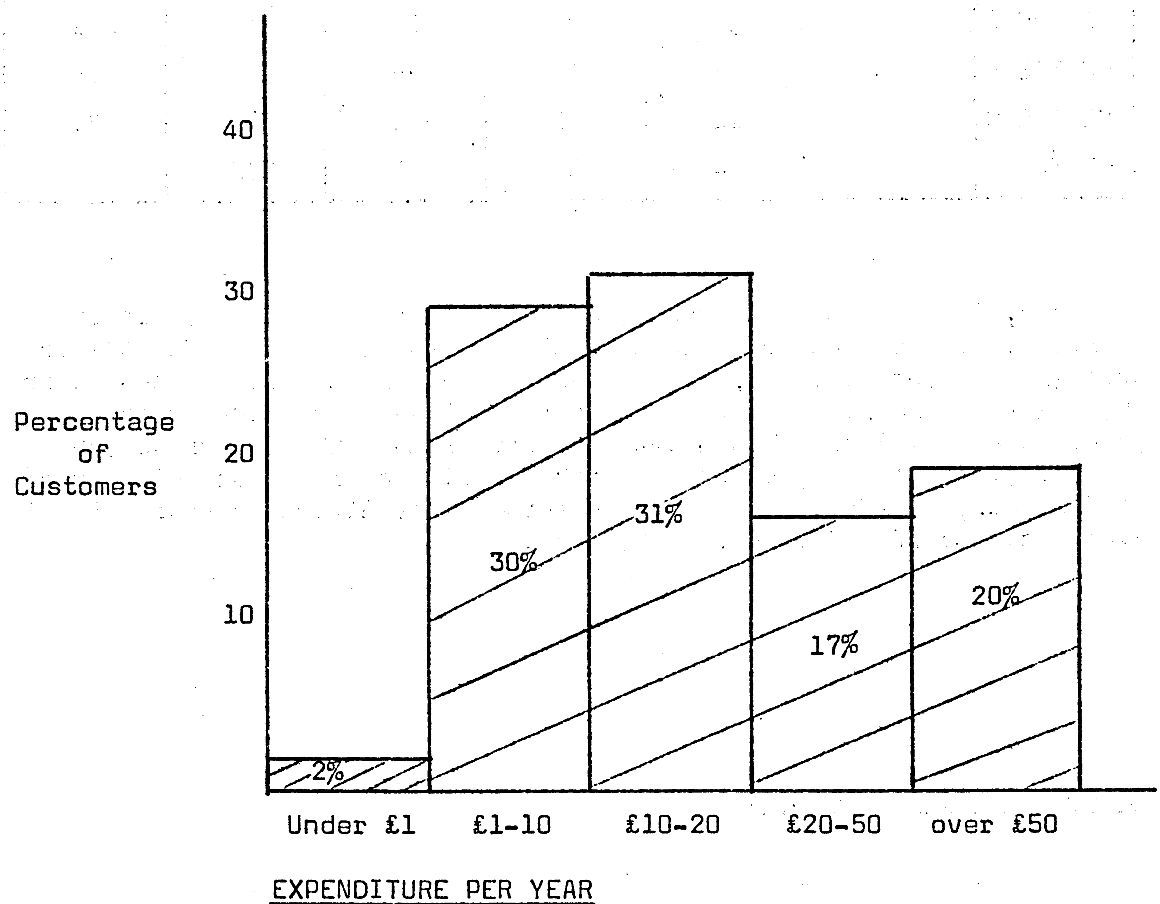
The analysis of results in this section would suggest that a convenient location is of no particular importance to customers when deciding where to shop for garden supplies. Customers often travelled considerable distances to visit the centres, the average distance being 13 miles. Most customers made a special trip to visit the centres and the majority came to buy a particular item. The frequency of visits by the customers was not high - the average being about 4 per year. The customers interviewed did not seem to have developed any particular loyalty to the individual centres, the majority buying the bulk of their supplies elsewhere.

SECTION 2 - Factors affecting Consumer Expenditure

The customers interviewed at the garden centres were asked to estimate how much they had spent on garden items during the past year. The replies to this question are summarised in Figure 7.

FIGURE 7

Customers' estimated annual expenditure on all garden items



While 32% of the customers interviewed had spent less than £10 and 63% less than £20 on their gardens during the year, there was an important group of customers who reported that they had spent over £50. This latter group would, if representative of all customers visiting the centres, account for roughly half the total value of sales. However, the results for the individual centres (see Table 1) show that the proportions of customers in each group varied considerably from one centre to another.

TABLE 1 Estimated Annual Expenditure of customers at the different Garden Centres

Percentage of customers

	Under £1	£1-10	£10-20	£20-50	Over £50	Average All Customers
CENTRE A	6	33	27	19	15	£21
CENTRE B	-	43	43	6	8	15
CENTRE C	-	12	13	32	43	37
CENTRE D	-	-	50	17	33	32

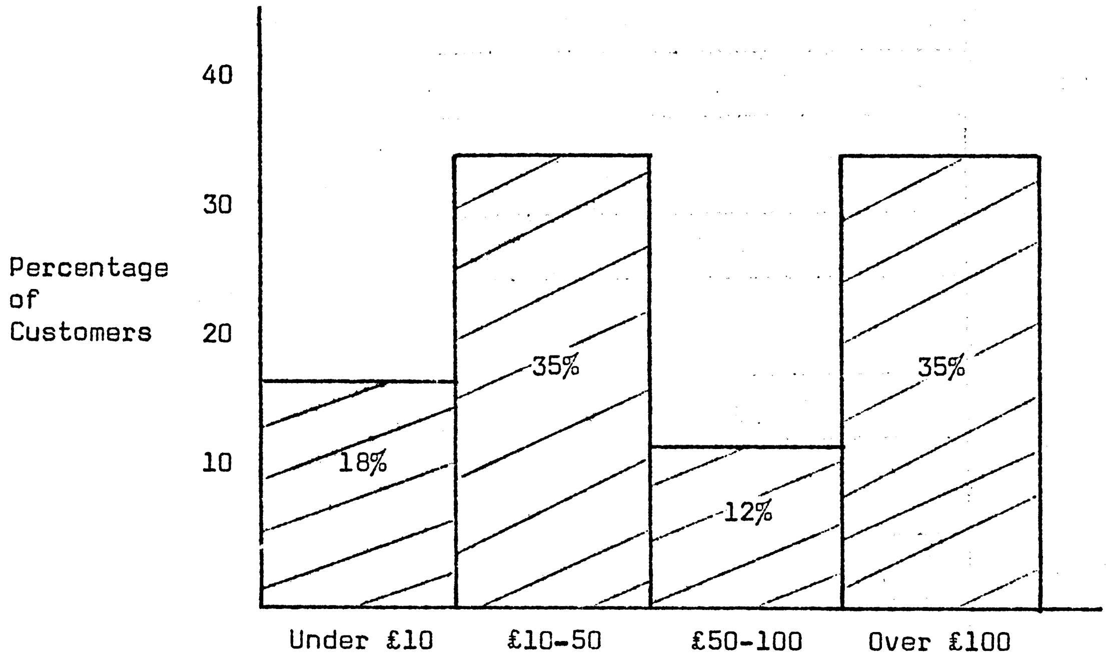
Clearly, in order to achieve a given sales turnover figure, garden centre managers need to watch not only the total number of customers visiting the centre, but also the expenditure per head. Thus Centre B, with over 80% of its customers spending less than £20 a year, may require a very large throughput of customers to achieve a reasonable turnover. Centre C, on the other hand, with over 70% spending over £20 a year, could achieve the same turnover by attracting a relatively small number of really serious buyers.

Customers with New Gardens

Since it was felt that householders with new gardens to establish might form one important group of customers, the respondents were asked if their gardens were new when they first occupied them. Forty-four percent of the customers interviewed stated that they had new gardens and their estimates of the costs of these are shown in Figure 8.

FIGURE 8

Customers' estimates of cost of establishing a new garden



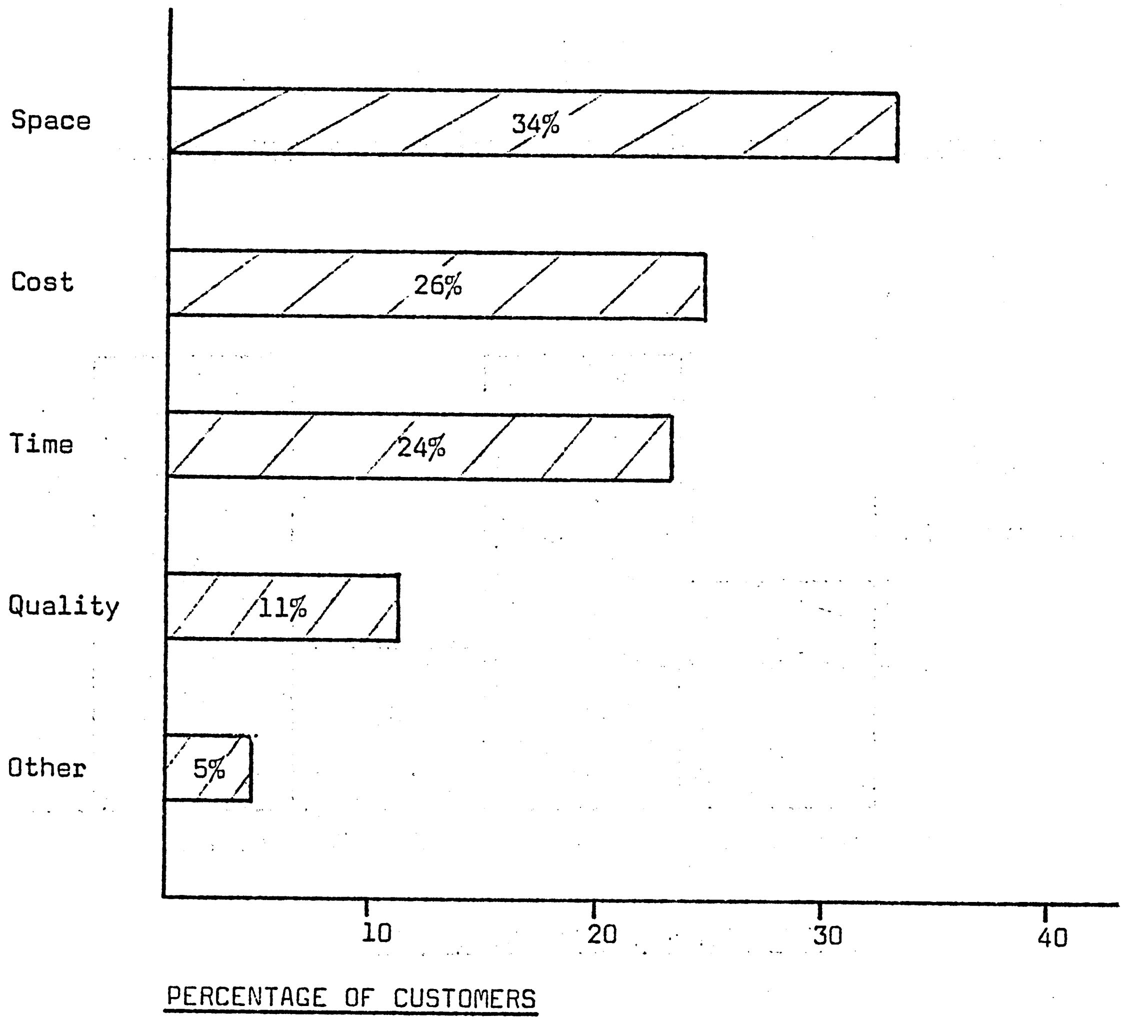
COST OF ESTABLISHING NEW GARDEN

There was a considerable range in these estimates, as many as 35% of customers considering the cost to be over £100. The average cost reported by all respondents was £60. Since new householders appear to constitute a large percentage of customers, a garden centre manager should, by advertising and special promotion, pay particular attention to this important group of customers. In view of the amounts of money spent on new gardens, catering for the specific needs of this group could result in greater consumer satisfaction and also increased profit for the garden centre.

In addition to identifying important groups of customers, garden centre managers who wish to give meaningful direction to their sales promotion efforts need to know the factors which limit consumer expenditure. The importance of various factors limiting customers' purchases of shrubs and plants is illustrated in Figure 9.

FIGURE 9

Factors limiting customers' expenditure on Plants and Shrubs



This analysis shows that garden space was the most important factor limiting expenditure (34%), followed by cost (26%) and time (24%). It would suggest that once people have an established garden they probably spend very little on plants and shrubs. Some ideas for overcoming this limitation might include 1) concentration on shrub species which use a minimum of space, 2) special offer of 'trade in' terms for replacement of old shrubs, and 3) provision of a free 'grubbing out' service.

The second most important factor was cost. Here the use of credit, particularly for new householders who, as we have seen, are a group likely to spend considerable amounts of money in establishing their gardens, might help to overcome this limitation.

Time was another important factor limiting expenditure, emphasising the need for garden centre managers to keep in mind the labour-saving aspects of gardening methods and plant culture.

SUMMARY OF SECTION 2

On average the customers interviewed spent an estimated £23 per year on their gardens. It is probable that a large proportion of total sales of the centres surveyed would come from a relatively small number (approx. 20%) of "Good" customers spending over £50 per year. There were significant variations in expenditure per customer at each centre due possibly to the different geographic locations of the centres or to differences in the clientele. New householders were an important group of customers, accounting for 44% of the total. On average, these customers spent £60 to establish their gardens. Garden space was the main factor limiting expenditure, followed by cost and time.

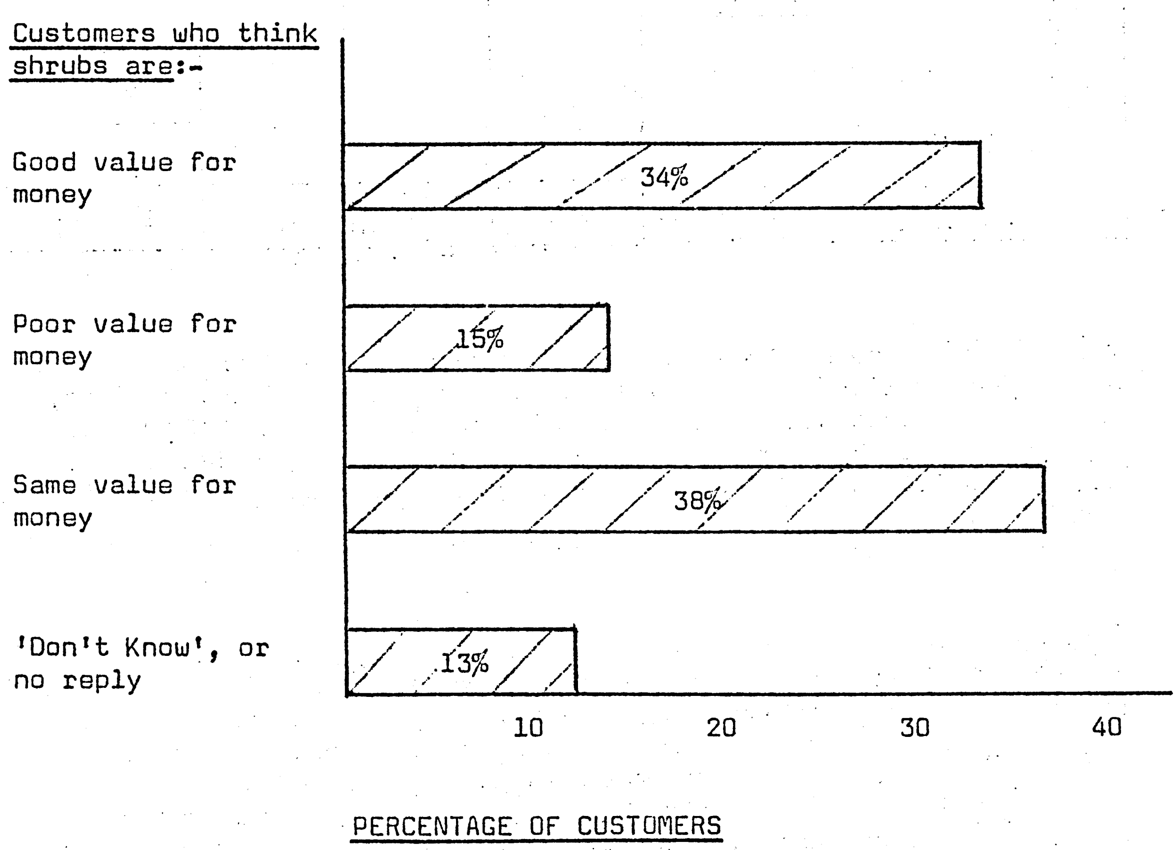
SECTION 3 - Customers' opinions about the price and quality of the shrubs sold, and the service provided by Garden Centres

The success of any garden centre depends to a large extent on consumer acceptance of the prices it charges relative to the quality of plants and other goods it supplies. Essentially, this means that it must offer good value for money. Low price does not necessarily mean good value if the quality of goods is not acceptable to the majority of customers. In the same way, a high quality article may seem 'expensive' to one customer but still represent good value to another who thinks it worthwhile to pay a bit extra for quality.

Despite the fact that 'value for money' may be open to a number of different interpretations, it was thought that an assessment of customers' general attitude to shrub prices would be worthwhile. Customers' opinions about shrubs as representing good - or bad - value for money are presented in Figure 10.

FIGURE 10

Customers' opinions about shrub prices compared with other consumer items



Thirty-four per cent of the customers interviewed thought shrubs were good value for money, 38% thought them about the same value for money as other items, and only 15% thought them poor value for money.

As a means of exploring further customers' opinions about the prices and quality of shrubs at the four centres respondents were asked to compare these with other suppliers. The results are summarised in Table 3.

TABLE 2 Customers' opinions about the prices and quality of shrubs at the Garden Centres, compared with other suppliers

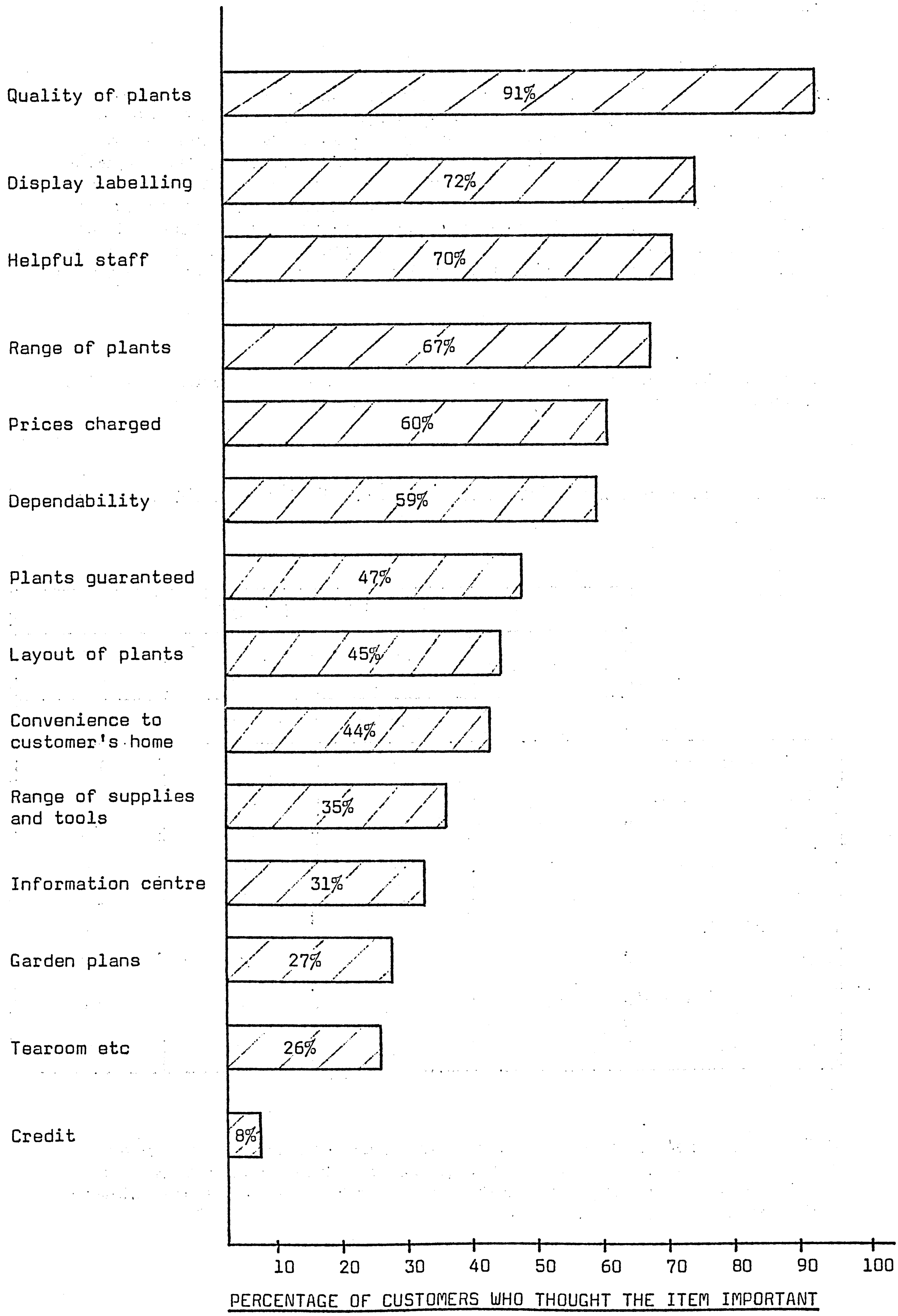
Centre	A	B	C	D	All Centres
Percentage of customers who:-	%	%	%	%	%
thought prices higher	18	52	60	100	45
thought prices lower	6	-	-	-	2
thought prices about same	76	48	40	-	53
	100	100	100	100	100
Percentage of customers who:-					
thought quality higher	12	30	40	50	27
thought quality lower	9	4	4	-	6
thought quality about same	69	66	56	50	67
	100	100	100	100	100

While most of the customers interviewed at Centre A thought that both prices and quality were about the same as those of other suppliers, the other centres tended to have a higher price image. While for some customers this reflected the higher quality of shrubs, the majority still thought the quality only about the same as from other suppliers.

Although value for money must be an important factor affecting cusomters' choice of where to shop for shrubs the quality of the service provided by garden centres may be a contributory factor. In order to determine the value to customers of various considerations which arise in connection with garden centre sales, respondents were asked to state which of several factors they thought were important in choosing a garden centre. The results - which were obtained at the Ayr centres only - are summarised in Figure 11.

FIGURE 11

Customers' opinions about the importance of various aspects of Garden Centre operations and services



This analysis would suggest that customers choose a garden centre primarily for the quality of its plants. By comparison, only 60% stated that price was important.

Despite the importance of quality, customers did not rate a guarantee on plants very highly. Similarly, although 'display labelling' and 'helpful staff' were considered important by some 70% of customers, a formal information centre was not considered necessary by the majority of customers. A wide range of plants was important to more customers than a wide range of general garden supplies and tools. A convenient location was unimportant to the majority of customers. Garden plans and tearooms were not highly rated and very few customers were prepared to admit that credit facilities would influence their choice of where to shop.

Customer-satisfaction (or otherwise) with the services provided by the garden centres in the survey is summarised in Table 3.

TABLE 3 Customers' opinions of the services provided by the Garden Centres

	Customers' opinions of Service or Item			
	Satisfactory	Not Satisfactory	Average	Don't know
	Percentage of Customers			
Quality of plants	68	3	15	14
Display labelling	63	16	14	7
Helpful staff	66	6	14	14
Range of plants	73	7	16	4
Prices	27	34	26	13
Dependability	46	5	11	38
Layout	76	2	17	5
Range of supplies and tools	51	2	26	21
Information	33	11	17	39

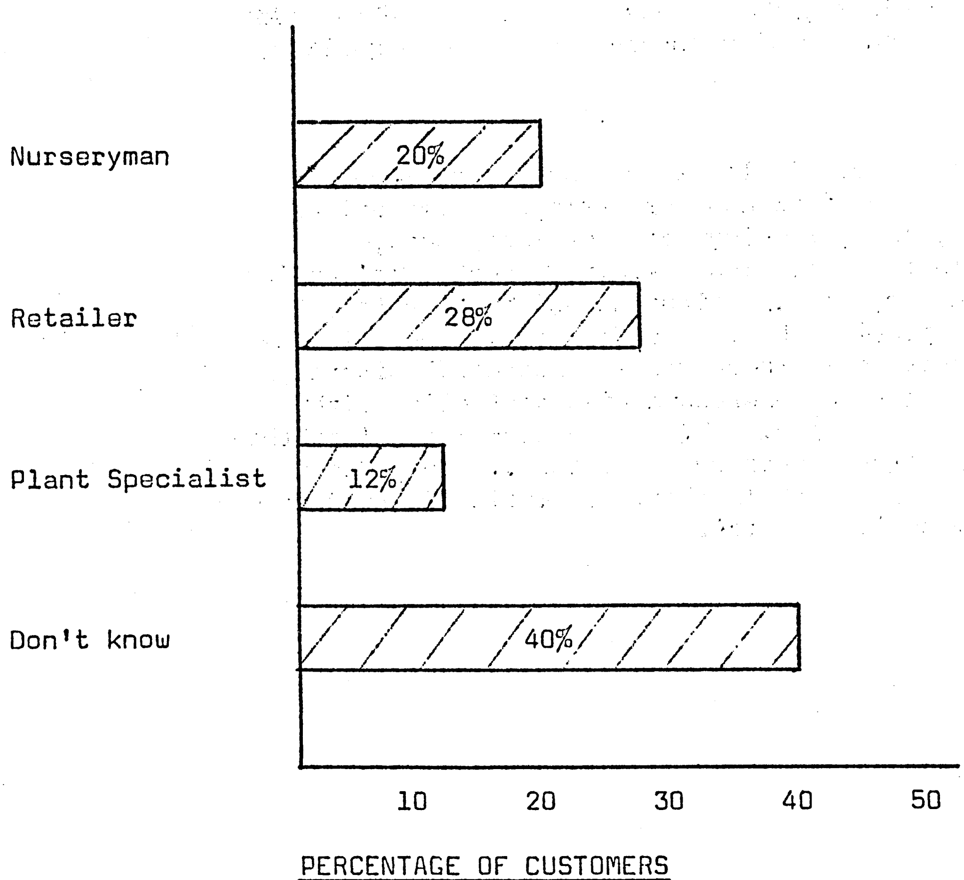
While customers' opinions about the services provided by the garden centres were generally favourable, prices stand out as the item which was least satisfactory, more than a third of the customers interviewed being positively dissatisfied.

Finally, an attempt was made to find out what 'image' - if any - customers had formed of the garden centre owners. If customers like to think of the owners as nurserymen who grow their own plants, then perhaps production and selling should be combined. If, on the other hand, customers already see garden centre owners primarily as retailers, then perhaps there is little point in garden centres becoming involved in production at all. As an alternative, the owners could develop a 'plant specialist' image, as persons able to advise people about all aspects of gardening and plant culture.

The results of this analysis are presented in Figure 12.

FIGURE 12

Customers' 'image' of the Garden Centre Owner



Forty per cent of the customers had no clear 'image' of the garden centre owner. Of the remaining 60%, 28% thought a 'retailer' was the best description and only 20% thought of him as a 'nurseryman'.

SUMMARY OF SECTION 3

In general, the customers thought that shrubs were either good value for money or at least as good value as other items - only 15% thought they were poor value for money. However, compared with other suppliers, the garden centres tended to have a reputation for high prices and moderate quality.

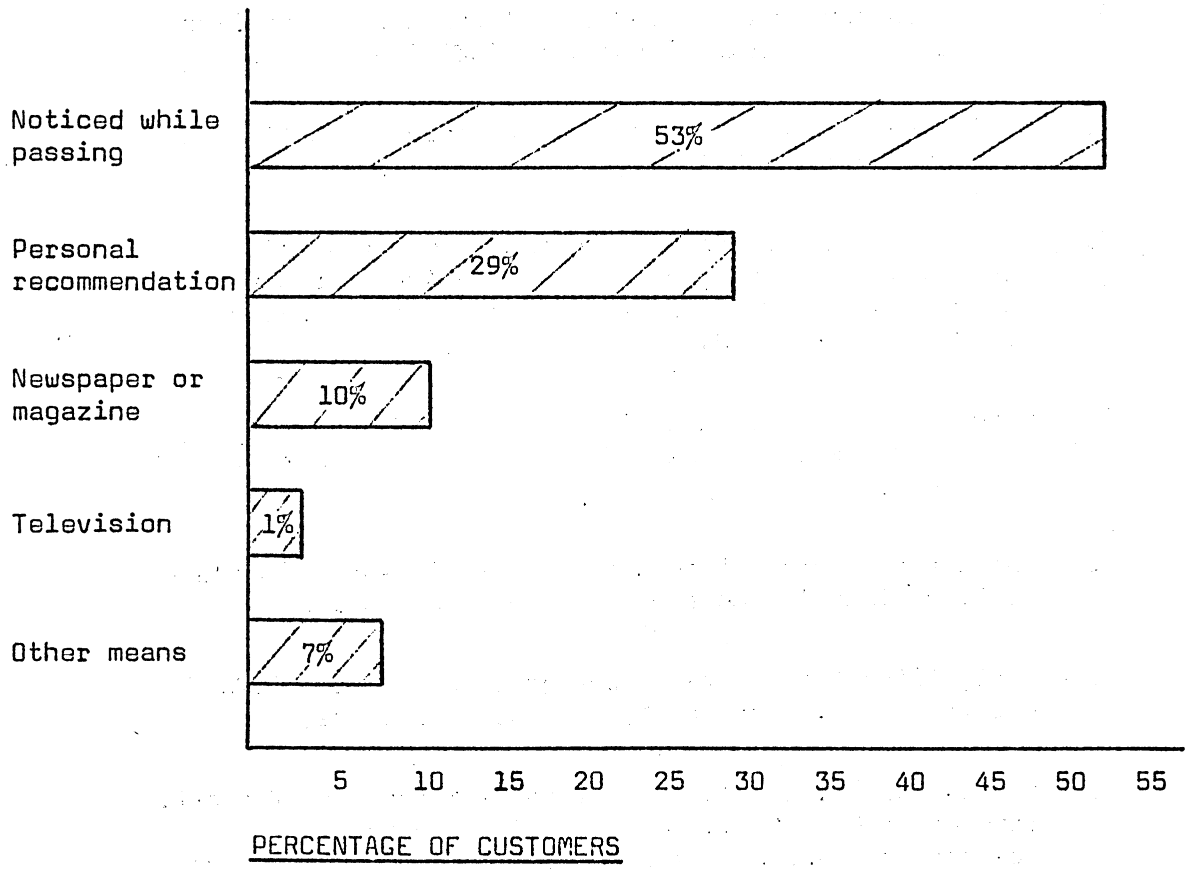
Plant quality, display labelling, helpfulness of staff, range of plants available, and the prices charged, in descending order of importance, were the main factors which influenced customers' choice of garden centres. Although opinions of the service provided by the garden centres were in the main favourable, there was a substantial minority of customers who expressed dissatisfaction with the prices charged. The customers' 'image' of the garden centre owners was not clear. Only 20% thought of them as 'nurserymen' while 28% thought of them as 'retailers'.

SECTION 4 - The impact of advertising and other means by which customers come to know about the Garden Centres

The customers were asked how they had come to know of the garden centre where they were interviewed. The results are summarised in Figure 13.

FIGURE 13

Means by which customers first came to know of the Garden Centres



This analysis emphasises the importance of a good location on a main road as a means of attracting customers - 53% of the total in this particular survey. It also demonstrates the sales-building effect of personal recommendations. By comparison, only 11% of the customers interviewed had been influenced by either newspaper or television advertisements. In view, however, of the wide trading areas covered by the garden centres, it is possible that increased advertising in national newspapers and on television would be effective in attracting new customers. Since customers tend to visit garden centres only a few times a year, advertising may also be very effective as a means of keeping customers informed about what is available at the centre at various stages of the gardening season.

CONCLUSIONS

1. Customers travelled considerable distances to visit the garden centres and tended to make a special trip in order to do so.

2. Garden centres situated out of town appeared to have a wider trading area than those in the centre of town.

3. Customers tended to 'shop around' for garden supplies and had no particular loyalty to individual centres.

4. Visits to garden centres were made only a few times a year in order to satisfy gardening needs.

5. Owners of new gardens were an important group of customers questioned, accounting for 44% of the total. The estimated average cost of establishing a new garden was about £60.

6. Garden space, cost, and time, in descending order of importance, were the main factors limiting expenditure on shrubs.

7. The garden centres tended to have a high-price/medium-quality 'image' compared with other outlets.

8. A significant minority of customers were dissatisfied with the prices charged by the garden centres.

9. Plant quality, display labelling. helpfulness of staff, range of plants available and prices charged, in descending order of importance, were the factors which influenced customers' choice of a garden centre.

10. Only 20% of the customers interviewed thought that the owners of the garden centres were nurserymen who grew their own plants.

11. Newspaper and television advertising was relatively unimportant in attracting customers to the four garden centres covered by the survey.

APPENDIX

THE WEST OF SCOTLAND AGRICULTURAL COLLEGE

ECONOMICS DIVISION

GARDEN CENTRE CONSUMER SURVEY - 1973

1) Where have you come from to visit this garden centre? ....

2) Did you make a special trip to visit the garden centre? Yes/No

3) How did you get here? Did you come

by car	......
on foot	......
by bus	......
other	......

4) How did you first come to know of this garden centre?

Personal recommendation	......
Noticed it while passing	......
Advert.	......
Don't know	......
Other reason	......

(Please state) ....

<u>If Advert</u>. - Where did you see it?

Newspaper or magazine	......
T.V.	......
Bus	......
Poster	......
Yellow Pages	......
Other	......

(Please state) ....

5) What was the reason for visiting the garden centre today?

was it a) to buy a particular item ......

b) to see what was available ......

c) Other ......

(Please state) ....

6) How often do you visit this garden centre? . .

about once a month ......

3-4 times a year ......

1-2 times a year ......

1st time ......

7) Which of the following do you think are important in choosing a garden centre?

Please tick	Important	Fairly Important	Not Important
a) Prices charged			
b) Quality of plants			
c) Plants guaranteed			
d) Dependability			
e) Range of plants available			
f) Range of garden supplies and tools			
g) Convenient to your home			
h) Helpful staff			
i) Display labelling			
j) General layout of plants			
k) Information centre			
l) Garden plans			
m) Credit facilities			
n) Tearoom etc			

8) Please indicate in which of the following you think <u>this garden centre</u> is, or is not, satisfactory:

Please tick	Satisfactory	Average	Not Satisfactory
Prices			
Quality of plants			
Dependability			
Range of plants			
Range of garden supplies and tools			
Helpfulness of staff			
Display labelling			
Layout			
Information			

9) In general, how do you think prices of shrubs compare with other consumer items as far as fairness is concerned?

Do you think they are a) good value for money ......

b) poor value for money ......

c) about same value for money as other items ......

10) Do you have a garden? Yes/No

(if <u>NO</u>, proceed to Question 16)

11) Was your garden new when you first occupied it? Yes/No

If Yes, what was the cost of establishing the garden

(read out expenditure charges)

under £10 ......

£10-50 ......

£50-100 ......

over £100 ......

12) Could you tell me roughly how much you spent on your garden last year?

(read out expenditure charges)

under £1	......
£1-10	......
£10-20	......
£20-50	......
over £50	......

13) What limits your plant purchases?

Cost	......
Quality	......
Garden space	......
Time	......
Other	......

(Please state) ....

14) Is this garden centre your main source of supply for shrubs and plants? Yes/No

from what other sources do you obtain supplies:

Department shops	......
Garden shops	......
Supermarkets	......
Mail Order	......
Other Garden Centres	......
Nurseries	......
Other	......

if other please state where ....

15) How do you think the prices of shrubs and plants at this garden centre compare with those of these other suppliers?

Do you think they are	higher	......
	lower	......
	about same	......

16) How do you think the quality of shrubs and plants at this garden centre compares with that of these other suppliers?

Do you think it is	higher	......
	lower	......
	about same	......

17) Which of the following do you think most closely describes the owner of this garden centre?

a) A nurseryman - who mainly grows his own plants ......

b) A retailer - who mainly buys plants for resale ......

c) A plant specialist - who can advise people about plants ......