**Lawn & Garden Centers & Nurseries 2022**

**Growing Number of New Gardeners Grow Revenues**

Lawn & garden centers and nurseries were prime beneficiaries of people remaining at home and in search of stress-reducing activities. The 2021 National Gardening Survey reports 18.3 million new gardeners. Veteran gardeners increased their activities, too.

More recent research from Axiom’s September 2021 consumer survey found 59.5% of all respondents said the pandemic increased their interest in gardening, but Millennials led the surge in interest at 74.3%.

SAAR data from the Bureau of Economic Analysis provides another indication of the substantial growth in this retail vertical. Consumer spending during Q2 2021 for “tools and equipment for house and garden” increased 16.3% YOY and 33.1% 2YOY.

**Garden Equipment and Supplies Dealers’\* Sales Comparisons, 2019–2021†**

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| Period | 2021 Sales | Change from 2020 | Change from 2019 | Period | 2021 Sales | Change from 2020 | Change from 2019 |
| Q1 2021 | $14.18 B | +33.3% | +38.7% | August 2021 | $4.60 B | +13.4% | +32.9% |
| Q2 2021 | $19.82 B | +1.0% | +40.7% | Sept. 2021 | $4.59 B | +7.2% | +39.1% |
| 1H 2021 | $34.00 B | +18.6% | +39.9% | Oct. 2021 | $4.88 B | +7.0% | +24.2% |
| Q3 2021 | $14.03 B | +8.8% | +33.5% | Nov. 2021 | $4.66 B | +15.6% | +30.5% |

US Census Bureau, February 2022 \*NAICS 444 †January–November periods

**Independent Garden Centers Reap The Harvest**

In *Garden Center Magazine*’s annual (2021) State of the Industry Report, 75% of the independent garden centers (IGCs) surveyed during October 2021 said revenues during their critical spring 2021 selling season exceeded spring 2020.

Almost all (95%) of the surveyed IGCs anticipated net profitability for all of 2021, with 22% stating the increase would be 15% or more, 33% stating an increase of 10–14% and 25% stating an increase of 5–9%.

Reflective of the 18.3 million new gardeners, ICGs said an increasing customer base was the #1 positive factor impacting their 2021 sales at 33%. The economy was second at 16%, quality of plant product third at 11% and advertising/marketing fourth at 10%.

**Independent Garden Centers’ Top 10 Greatest Challenges, October 2021**

|  |  |  |  |
| --- | --- | --- | --- |
| Challenge | Percent | Challenge | Percent |
| #1: Staffing | 26% | #6: COVID-19 protocols | 6% |
| #2: Availability of product | 15% | #7: Competition | 5% |
| #3: Increased labor costs | 10% | #8: High shipping costs | 4% |
| #4: Supply chain delays | 9% | #9: Weather | 4% |
| #5: Advertising/Marketing | 8% | #10: Decreasing customer base | 3% |

*Garden Center*, November 2021

**Gardeners’ Insights**

The Axiom report cited on page 1 also found 44.4% of all surveyed consumers and 54.9% of Millennials said they spent more time gardening during 2021 and 62.4% of all surveyed consumers said they would continue to garden during 2022.

Not only did these consumers garden more during 2021, but also 37.8% said they were “very successful,” compared to 34.6% during 2020, and 46.6% said they were “successful,” compared to 47.3% during 2020.

Almost half (48.6%) said they spent more on gardening activities during 2021, while 43.4% said they spent the same. The largest percentage (27.0%) spent most of their gardening dollars at independent garden/nursery centers, with Home Depot second at 23.9%.

**Surveyed Consumers’ Top 10 Favorite Types of Gardening, September 2021**

|  |  |  |  |
| --- | --- | --- | --- |
| Type | Percent | Type | Percent |
| #1: Flowers | 71.9% | #6: Shrubs | 31.6% |
| #2: Vegetables | 65.8% | #7: Indoor | 28.3% |
| #3: Houseplants | 40.6% | #8: Fruit trees | 26.5% |
| #4: Perennials | 38.7% | #9: Berries | 19.1% |
| #5: Container | 33.4% | #10: Other | 2.3% |

 Axiom, October 2021

**More Gardeners’ Insights**

Although consumers in the Axiom survey said independent garden/nursery centers were where they spent most of their gardening dollars, Home Depot was where they bought most of their gardening supplies (fertilizers, hoses, tools, etc.) at 25.7%.

Independent garden/nursery centers were first for the most important places to learn about new plants, gardening supplies and outdoor living products at 21.9%, with big-box retailers (Home Depot, Lowe’s, Walmart) second at 18.1% and Websites third at 14.2%.

Facebook (33.5%) was the #1 social media platform to learn about new gardening plants, supplies and products among all survey respondents, compared to 30.8% of Millennials. YouTube, however, was first among Millennials at 26.3%.

**Surveyed Consumers’ Top 10 New Gardening Projects for 2022, September 2021**

|  |  |  |  |
| --- | --- | --- | --- |
| Project | Percent | Project | Percent |
| #1: New vegetable gardens | 54.5% | #6: More container gardens | 24.2% |
| #2: New annual/perennial plant varieties | 39.0% | #7: Creating gardens with native plants | 23.7% |
| #3: More garden space | 34.3% | #8: An automatic watering system | 11.8% |
| #4: More plants for pollinators/wildlife | 26.6% | #9: Adding a privacy fence | 11.4% |
| #5: New varieties of shrubs and trees | 25.7% | #10: Other | 3.1% |

Axiom, October 2021

**A Profusion of Houseplant Purchases**

According to Floral Marketing Fund’s 2021 Consumer Houseplant Purchasing Report, 42.7% of survey respondents said they were “extremely interested” in purchasing houseplants during 2021, compared to 39.1% from the 2019 survey.

Although almost the same percentage of consumers said they owned 2–5 houseplants (the most) during 2021 (52.1%) and 2019 (51.4%), a larger percentage said they owned 6–10 houseplants (24.7%) during 2021, compared to 2019 (20.4%).

During 2019, 42.2% said they purchased houseplants 2 to 3 times monthly, compared to just 10.2% during 2021. 47.1% were purchasing 2 to 3 houseplants annually during 2021, compared to 11.8% during 2019.

**Likelihood of Surveyed Consumers Purchasing**

**Small Flowering Houseplant as a Gift, 2021 vs. 2019**

|  |  |  |
| --- | --- | --- |
| Likelihood | 2021 | 2019 |
| 1: Very unlikely | 11.4% | 39.7% |
| 2: Unlikely | 5.3% | 9.5% |
| 3: Same | 21.6% | 18.2% |
| 4: Likely | 27.3% | 17.6% |
| 5: Very likely | 34.4% | 15.1% |

 Floral Marketing Fund, December 2021

**Marketing the Greenery**

With 18.3 million new gardeners, ICGs have specific plans to retain as many of them as possible. “Improving social media presence” is first at 71% and “implementing more informational signage” is second at 45%.

In the *Garden Center* survey, ICGs said Millennials were the customer demographic increasing the most during the past 18 months at 65%, with Gen Zers at 44%, Gen Xers at 33% Gen Xers and Baby Boomers at 17%.

With substantial increases in Millennials and Gen Zers as customers at ICGs, it’s not surprising “social media platforms” were their #1 marketing method during the past 12 months at 84%. Facebook was ICGs first social media choice for marketing at 96%.

**Marketing Methods ICGs Used During the Past 12 Months, March 2020–April 2021**

|  |  |  |  |
| --- | --- | --- | --- |
| Method | Percent | Method | Percent |
| #1: Social media platforms | 84% | #8: Hosting events | 27% |
| #2: Website | 78% | #9: Billboards | 22% |
| #3: Email | 58% | #10: TV commercials | 18% |
| #4: Online/Digital advertising | 48% | #11: Referral program | 9% |
| #5: Newspaper ads | 36% | #12: Other\* | 2% |
| #6: Radio commercials | 32% | #13: None | 1% |
| #7: Classes | 27% |  |  |

*Garden Center*, November 2021 \*news segments, local monthly magazine, Pandora, weekly radio show, etc.

**More Valuable Insights**

The Floral Marketing Fund’s 2021 Consumer Houseplant Purchasing Report includes many more insightful comparisons of 2021 to 2019 houseplant purchases.

With many consumers reluctant to shop at stores during the 2021 pandemic waves, they purchased houseplants at retail outlets much less than than during 2019, a trend likely to reverse during 2022.

**Comparison of Retail Outlets Where Consumers**

**Purchased Houseplants, 2021 vs. 2019**

|  |  |  |
| --- | --- | --- |
| Retail Outlets | 2021 | 2019 |
| Garden centers | 29% | 64% |
| Farmers markets | 10% | 34% |
| Independent florists | 10% | 34%  |
| Wholesale store | 10% | 26% |
| Supermarket florists | 17% | 51% |
| Online stores | 10% | 0% |
| Wire services | 6% | 19% |
| Home improvement stores | 30% | 66% |
| Super-discount stores | 22% | 25% |
| Other | 1% | 0% |
| None | 1% | 0% |

 Floral Marketing Fund, December 2021

Larger percentages of consumers had reasons to purchase houseplants at selected retail outlets during 2019 than during 2021.

**Comparison of Consumers’ Primary Reason for Purchasing**

**Houseplants at Selected Retail Outlets, 2021 vs. 2019**

|  |  |  |
| --- | --- | --- |
| Primary Reasons | 2021 | 2019 |
| Price | 26.1% | 63.3% |
| Convenient location | 28.7% | 57.2% |
| Product selection | 25.8% | 55.6% |
| Quality products | 22.1% | 48.5% |
| Unique product offerings | 11.8% | 31.0% |
| Customer service | 13.2% | 19.1% |
| Welcoming interior | 6.2% | 11.6% |
| Deals/Promotions | 6.0% | 10.9% |
| User-friendly Website | 6.9% | 10.4% |
| Loyalty program | 5.2% | 9.6% |
| 24-hour access | 5.2% | 9.6% |
| Other | 1.0% | 1.1% |

 Floral Marketing Fund, December 2021

*Sources:* National Gardening Association Website, 2/22; Axiom Website, 2/22; U.S. Bureau of Economic Analysis Website, 2/22; US Census Bureau Website, 2/22; *Garden Center Magazine* Website, 2/22; Floral Marketing Fund Website, 2/22.

*Updated*: February 2022

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**Local Market and Station Information**