

Plant Material Requirements of Landscape Architects as Related to the Greenhouse Industry

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During the past three years I have initiated a market research program designed to gather information that will assist various industry segments with their marketing practices. The initial phase of this effort has been a survey of landscape architects in Georgia. Landscape architects were chosen as the initial group because they influence demand for plants when they specify plants for their landscape projects. An often over-looked point is that landscape architects also add value to our product through effective presentation in the landscape. Therefore it is important that our industry work closely with this group and try to ensure that they have the necessary services and plant material.

Survey results presented earlier in the Georgia Green Industry Newsletter revealed that landscape architects specify a significant amount of plant material and rely on nurserymen for assistance in selection and use of plants, two important reasons to market to this important group. In fact when asked what nurserymen could do to assist landscape architects, their comments were basically two-fold, tell me what products you have (plant availabilities) and tell me how to use your plants in the landscape.

The availability of plant material has been a point of contention between growers and landscape architects. Growers often express frustration that landscape architects don't specify what they have produced. On the other hand, landscape architects are frustrated that growers seem to produce what they want and not what landscape architects need. The current situation is that landscape architects spend too much time substituting plants and still may not have the desired landscape. On the other hand, growers need to project plant material requirements about five years into the future to make product line decisions, today.

So, how do we get out of this situation and better serve the landscape customer, while helping our industry to become more profitable? For growers with plants to sell today, you can provide landscape architects with regular, frequent, plant availability listings. You should also provide information on

where to locate plants in the landscape, such as wet vs. dry areas, shade vs. sun, etc. For longer term planning we need to know what varieties will be in demand! The approach used in this study and one that provides latitude for growers, is to better understand future plant material needs in the context of landscape trends. From these landscape trends, growers can identify categories of plants, and even specific varieties, to meet the landscape requirements. The identified plants could then be marketed in the context of landscape trends and needs.

In the 1991 survey of Georgia landscape architects we first determined current and future needs for nine categories of plants. The nine categories of plants that represented the spectrum of plants used in the landscape were large deciduous trees (>3"), small deciduous trees (3"), evergreen trees (broadleaf and coniferous), coniferous shrubs, broadleaf shrubs (evergreen and deciduous), perennials/ground covers (hosta, liriope, ivy, etc.), native herbaceous (ferns, wildflowers, grasses, etc.), bedding plants (annuals),

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and turf (sod). The results were segmented by size of firm. Market segmentation provides greater insight into the plans of landscape architects and allows growers to target specific needs for different size firms, when differences exist.

The mean value of plants specified by each Georgia landscape architect was \$91,000 for large deciduous trees (19% of all plants specified), \$85,500 for small deciduous trees (18% of all plants), \$84,200 for evergreen shrubs (17% of all plants), \$68,000 for sod (14% of all plants), \$59,700 for evergreen trees (12% of all plants), \$43,700 for perennials/groundcovers (9% of all plants), \$20,300 for coniferous shrubs (4% of all plants), \$18,600 for bedding plants (4% of all plants), and \$12,100 for native herbaceous (3% of all plants). The value of plant material specified, within each plant-type, varied significantly with the size of the landscape architectural firm.

The mean percentage of plant value for the three firm sizes, within each plant-type, did not vary significantly. This suggests that the mix of plant-types used in the landscape is constant across all size firms. Although large firms use more plants than do small or medium firms, the type of plants specified did not vary by size of firm. Therefore when marketing to landscape architectural firms the plant material requirements will probably be similar, at least in terms of the major categories of plants. The greater use of plants by large firms may be a function of more projects or larger projects.

The largest category of plants specified by landscape architects, in terms of \$ value, was the ornamental trees, approximately 50% of the value of all plants specified. The value of deciduous trees was approximately 75% of all trees and, equally divided between small and large trees. The remaining 25% was evergreen trees. The large firms accounted for approximately 80% of the value of all trees specified.

The five plant-types normally associated with container ornamental nurseries in Georgia (Nursery Stock) constituted about 37% of the value of all plants specified. Within the Nursery Stock category, broad-leaf shrubs were about 47% of the value of plant material, followed by perennials/ground covers (24%), coniferous shrubs (11%), bedding plants (11%), and native herbaceous (7%). The large firms accounted for 72% of the value of nursery stock

specified. Turf (sod) accounted for 14% of the value of all plant material specified. Large firms specified 78% of the value of sod.

To assist plant producers with production planning, landscape architects were asked to project their needs for each of the nine plant-types, over the next five years. For two types of plants, coniferous shrubs and turf, the predicted need varied significantly with the size of the firm. For coniferous shrubs and turf, the large firms projected a lower level of need, compared to small and medium firms. This is not a positive sign for these two categories of plants since the large firms accounted for about 70% of the value of all plants specified. The frequency of respondents indicating a need for "more" plants was highest for the plant-types, native herbaceous, perennials/ground covers, large deciduous trees, small deciduous trees, and evergreen trees. The projected increased use of native herbaceous and perennials/ground covers is a positive sign for the product lines represented by most of the readers of this newsletter.

Landscape architects were also asked to identify up to three trends that could change the type of plants specified over the next 5 years and, to rank them by order of importance. The rationale behind this ques-



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tion is that if you understand the things that will drive the decision making of landscape architects then you can better select the specific cultivars of native herbaceous or perennials/groundcovers.

The seven trends identified by landscape architects in Georgia were; less available water for landscaping, low-maintenance landscapes, more color, less pesticide use, smaller areas to landscape, impact of the environmental movement, and use of more/larger trees. The responses did not vary by size of firm indicating a strong agreement among landscape architects regarding landscape trends that would influence the type of plants specified over the next five years.

Over 50% of the respondents listed water availability as the most important issue that could affect the type of plants specified. In fact, 91% of the firms listed water availability as first or second in importance. Comments by respondents indicated a strong concern over total water availability and, the likelihood of water interruptions. The comments suggest that future landscapes should require less water and be able to survive periods of no water.

The trend toward lower maintenance landscapes was identified by 75% of the respondents, with 18.7%

listing as the most important trend. Specific comments were related to lower costs for replacement of plant material, such as fewer change-outs of annual beds. Also mentioned was landscapes that require less maintenance, such as pruning, spraying, and mowing. The customers of landscape architects expect to spend less for maintenance of future landscapes.

The use of more color was listed most often as a #3 priority. Many of the respondents listing this trend indicated that color, in terms of flowers, would increasingly be obtained through the use of perennials. Also more color would come from selection of plants for their foliage color during the growing season as well as during the fall season.

Landscape architects identified the use of pesticides as a trend that could affect the type of plants required in future landscapes. They were concerned that there would be fewer pesticides to apply and, that their clients would prefer landscapes that do not require use of pesticide applications. They expressed interest in disease and insect resistant plants.

Smaller areas to landscape was listed as a trend by relatively few firms but was listed as #1 importance by all firms listing this trend. In response to smaller areas they expect taller buildings which creates a need for more columnar plants.

The "environmental movement" trend was identified by approximately 56% of the respondents with most of the respondents rating it as a #3 choice in importance. The most frequently listed comment for this trend was increased use of native plants. Other comments included wildlife habitat landscaping and more wetland plants.

Several landscape architects identified a trend toward the use of more trees in the landscape and in city planning, citing city ordinances requiring replanting of trees or use of more trees in parking lots. They also predicted use of larger caliper trees. All firms that listed this trend identified it as #1 importance.

The landscaping trends provide insight for marketing communications directed to landscape architects. Plant catalogs and plant availability listings could be organized by these trends. The grouping of plants by

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use, such as low water-requiring, butterfly plants, etc. would be more useful to landscape architects than an alphabetical listing. This format would simplify plant selection by landscape architects.

Landscape architects need assistance in site selection and understanding the benefits of plants. Growers are generally the most knowledgeable about plant performance and, have a responsibility, as the supplier, to educate the customer on proper use of the product. This is an area where producers and university personnel could work together to develop value-added information. The specific cultivar may not be as important to a landscape architect as the fact that a plant meets certain landscape requirements, providing an opportunity of growers to influence selection of specific cultivars. As an industry we need to place more of our marketing emphasis on the uses and benefits of our product. To-date we focused primarily on aesthetics. Marketing communications for new or existing cultivars should highlight how these new plants can accommodate one or more of the landscape trends identified in this study.

If you are interested in more detailed information regarding the survey of landscape architects, I can be reached at (912) 386-3410.

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