

# Gardening to Decline 16% Over the Next 15 Years?

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Did you catch it? The July 10, 1989 issue of "U.S. News & World Report" (USN&WR) under its 'news you can use, vital statistics' section, reported on the next generation's wants. From surveys and demographic models, marketers predict that demand for the following services, products and activities will rise or fall over the next 15 years by their respective percentages shown:

Live theater performances .....	+98%
Discount brokers .....	+72%
Mutual funds .....	+57%
Health maintenance organizations (HMOs) ...	+32%
Classified ads .....	+27%
Sailing .....	+19%
Real estate other than home .....	+10%
Vitamins .....	+10%
Psychiatric care .....	+ 8%
Entertaining at home .....	-10%
Eyeglasses .....	-11%
Health clubs .....	-13%
<u>GARDENING</u> .....	<u>-16%</u>
First mortgages .....	-22%
Auto loans .....	-26%
Bowling .....	-38%
Diet pills .....	-47%
Camping .....	-48%

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USN&WR - Basic data: National Decision Systems

## Wow!!

Gardening as an American activity has been going "gangbusters", according to the Nat'l Gardening Association's (NGA) data obtained by the Gallup Organization. (Of course, the NGA has been tracking U.S. household lawn and garden activities; but not the *nonhousehold* gardening activity, i.e., businesses, schools, government entities, and other non-homeowner use.) The NGA's millions of households participation percentages have been rather steady recently: 71% of

the households participating in 1985, 69% in 1986, 70% in 1987, and (even) 69% in 1988 with that year's big drought. As for NGA's recent lawn and garden retail sales data, they were \$12 billion sales in '85, \$14.2 billion in '86, \$17.5 billion in '87, and (a decline) \$15.5 billion in 1988 that was influenced largely by the drought. There is no question about the weather having been, perhaps, the major influence in gardening's fortunes. So how does the NGA current data square with the drastic/dismal USN&WR futuristic change? Not an easy question—but let's think about it.

First, what's the USN&WR definition of gardening vs. the NGA's, or even more appropriately, your own definition of gardening within your own market? Vegetable gardening has declined within the NGA's 15 lawn and garden subactivities. Our USDA data also substantiated the vegetable bedding plant decline, as do our PPGA annual surveys. However, lawn care (NGA data) has been very strong, as has landscaping. Indoor houseplants (foliage) have softened. We aren't sure whether we're comparing the same gardening activity.

Second, the USN&WR title reads, 'The Next Generation's Wants'. Does this refer only to the youngest—next—generation's demand? The next generation, of course, could be different from the (older) rest of the market.

Thirdly, surveys and demographic models were used in predicting over the next 15 years. Which surveys? What demographics? What assumptions were made? Have some new, good data and procedures been developed that help us reliably understand and predict? Let's try to check it out.

Fourth, the Gallup Organization (separately from the gardening survey) has been tracking the leisure activities of Americans. And, gardening has been near the top of the participation list—after watching sports on TV, book reading, and watching cable TV (NGA Survey, 1985-86). Other outfits, besides Gallup, have probably been studying leisure activities. We need to be updated on such reliable, available studies of leisure.

Fifth, our (perhaps biased) view of the gardening future is bullish. People garden because of basic motivations such as: fun—a sense of accomplishment—the therapeutic value (Dichter Motivational Institute). Motivations for vegetable gardening (NGA, 1983) were: to save money—better tasting food—fresh vegetables—fun/enjoyment—for canning/freezing—relaxation/hobby—more healthful food—exercise—family activity. Reasons for *not* gardening were: no time—no space, too much work—not able to—failed in the past—lack of know-how—too expensive—don't know. As mentioned before, vegetable gardening had declined. Do some of the reasons for *not* vegetable gardening also apply to flower/other gardening? Sure do—lack of time, the work, not able, failed before, lack of know-how, expensive, and don't know. They all could apply. Can we/should we begin to emphasize gardening motivations, and try to correct those reasons for not gardening over which we have control? Service work (i.e., landscaping, maintenance, knowledgeable help) seem strong and perhaps has more potential where the customers' lack of time or know-how exists but where discretionary dollars exist.

Sixth, even our bullish gardening industry will, eventually, hit diminishing returns. We have often wondered about bedding plants with an almost uninterrupted successive yearly increase for the last 2 decades or so. At some point, the overall market will not, profitably, absorb some relatively too-large supply. The strong market growth will slow and only a 'replacement' market will be available. Is this USN&WR survey predicting this scenario? It's hard to say, even though we believe our future is brighter, especially when considering our society's appreciation of gardening and (current) the relative lack of knowledge that, if corrected, would enhance gardening performance and appetites.

Finally, markets change. It's desirable to regularly monitor the market and especially our customers. The need for reliable

market information is continuous. The USN&WR—whether correct or not—can serve as a reminder for us to be alert, not to take our current good market conditions for granted, and, to exercise some wisdom and caution.