

GROW the MARKET

Find out what the consumer thinks of you and your services, and why they invest in their yards.

SPONSORED BY



CORONA
SEASON AFTER SEASON

Forever an essential industry



In 2020, the green industry rose to the challenge of being an essential part of maintaining our landscapes and green spaces during these pandemic times. We were all learning new skills in technology to stay in contact. We found a way to service the growing population shift from urban households to working from home in larger suburban and rural households in need of more space.

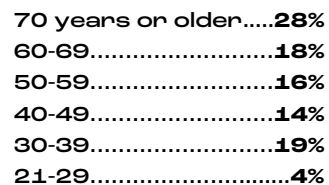
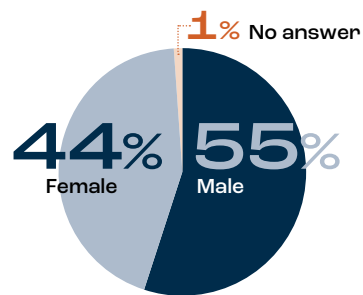
We witnessed unprecedented interest in new homeowners investing in their homes and landscaping projects. They took to their gardens and yards for many reasons which fueled demand for landscape services. Today they continue on their yards to gather in small groups or enjoy a quiet oasis to decompress from the workday. Homes with more space and larger landscapes that required regular maintenance and service.

There has never been more opportunity for growth in the green industry.

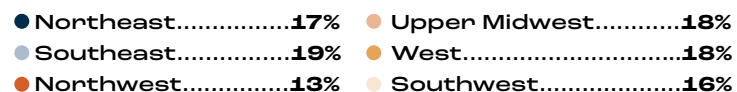
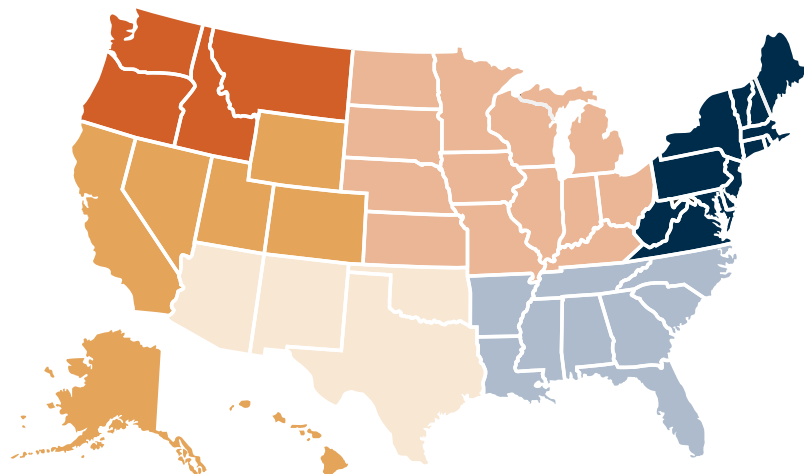
Since 1928, it's been a long-standing heritage at Corona to provide the tools professionals and business owners need to promote growth, maximize efficiency, while sustainably caring for the world we live in. It's why we've helped bring "Grow the Market" to light and provide the tools you need to grow your business, based on solid research. We've been helping since day one and nearly 100 years later, we haven't stopped because professionals rely on Corona tools. We're always ready to go to work when you need us and ready to help you grow your piece of the market.

Clayton Tharrington
Channel Manager - Pro

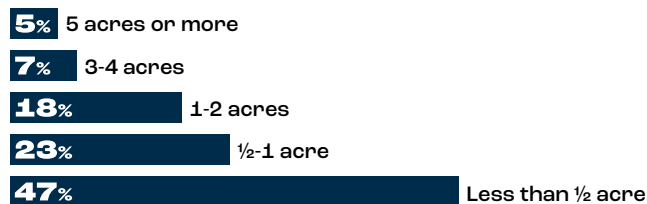
Lawn & Landscape once again is investigating why homeowners spend money with you. Through our Grow the Market survey, we find out what the consumer thinks of your services in general and dig specifically into maintenance, lawn care and hardscaping/installation. We last published this study in 2016, so we'll compare how things have changed in the five years since the last report. But first, here's a look at the demographic that took the survey.



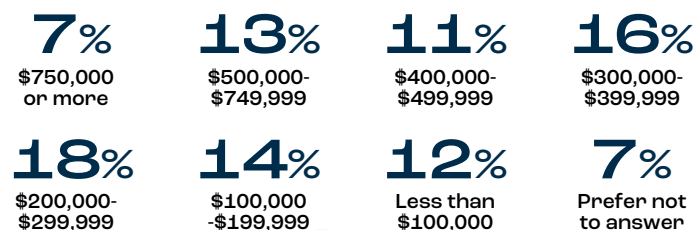
LOCATION OF PRIMARY HOME?



APPROXIMATE AMOUNT OF ACREAGE MAINTAINED (lawn, flowers and shrubs, outdoor living areas, etc.)



VALUE OF PRIMARY RESIDENCE?



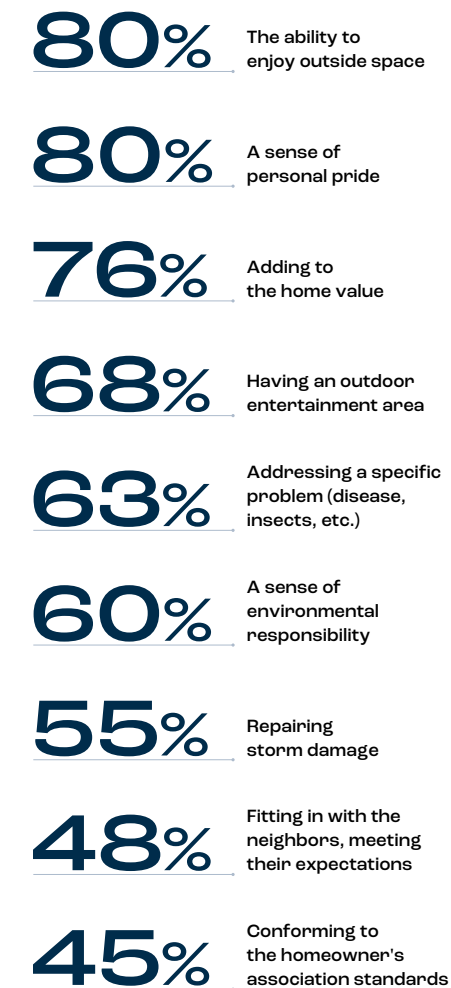
© BOYKO PICTURES | ADOBE STOCK



It's clear from the numbers, consumers still value their lawn and landscape as much as they did five years ago – which is a lot. Compared to 2016, the ability to enjoy outside space and a sense of personal pride were the top two motivations to improve landscaping. But the number of people who scored it as influential to extremely influential increased by 12% for both compared to 2016.

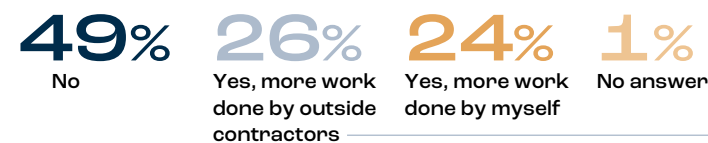
Homeowners are also factoring it into their discretionary spending more. About 60% said, compared to spending on vacation, entertainment, etc., that landscaping was important to extremely important. That number was closer to 50% in 2016.

*HOW MUCH ARE THE FOLLOWING MOTIVATIONS TO IMPROVE YOUR LANDSCAPING?



*Represents percentage who rated the option influential or extremely influential/agreed or strongly agreed.

IN THE PAST THREE YEARS, HAVE YOU MADE ANY CHANGES IN HOW MUCH OF THE LAWN CARE AND LANDSCAPING YOU DO AROUND YOUR HOME?



FOR THOSE WHO SAID THEY'VE HIRED A LAWN CARE OR LAWN MAINTENANCE CONTRACTOR:





→ About 25% of homeowners have a landscape maintenance contractor working on their lawn, which is close to what the 2016 study found. Of those who do, the NET Promoter Score, which measures customer satisfaction, found 57% as a promoter, while only 17% fell into the detractor category. The remaining 25% were passive.

***PLEASE INDICATE YOUR LEVEL OF AGREEMENT WITH THE FOLLOWING STATEMENTS**

- 75%** Landscaping increases the value of my home
- 67%** If I decide to sell my home, I can make any necessary landscape improvements in a year or less
- 66%** A well-managed lawn and landscape can help improve the environment in my community
- 65%** Landscape installations (planting areas, shrubs, trees, etc.) done by contractors are prohibitively expensive
- 62%** The green space around my home is an important contributor to the environment
- 56%** I think the landscapers I hire are professional businesspeople
- 55%** I enjoy mowing my own grass/maintaining my home's landscape
- 55%** I trust the recommendations I receive from the lawn and landscape contractors I hire
- 50%** I save time hiring a professional landscape contractor
- 39%** I want my yard to be the envy of the neighbors
- 37%** I prefer organic lawn care to traditional programs

COMPARED TO THE INSIDE OF YOUR PRIMARY HOME, HOW IMPORTANT IS IT THAT THE OUTSIDE LOOKS NICE AND THEREFORE IS ENJOYABLE TO LIVE IN?

- 11%** Much more important
- 10%** Somewhat more important
- 56%** Equally Important
- 16%** Somewhat less important
- 6%** Much less important

→ All of these categories increased percentage-wise from 2016, but the biggest jump was a four-way tie between seeing trucks in the neighborhood; online advertising, direct mail advertising; and door-to-door solicitation - all four increased by 23%

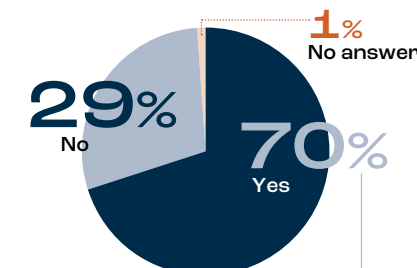
***WHEN SELECTING A CONTRACTOR(S) TO DO THE MAINTENANCE, LAWN CARE, LANDSCAPING OR HARDSCAPING IN YOUR YARD, HOW IMPORTANT ARE THE FOLLOWING SOURCES OF INFORMATION?**

- | | |
|-------------------------------------------------|---------------------------------------|
| 73%: Recommendations from friends/family | 34%: Online social networks |
| 51%: Online reviews | 34%: Yard signs |
| 48%: Seeing trucks in the neighborhood | 32%: Door/mailbox hangers |
| 36%: Online advertising | 30%: Newspaper advertising |
| 35%: Direct mail advertising | 29%: Door-to-door solicitation |

***HOW INFLUENTIAL ARE THE FOLLOWING AS MOTIVATIONS TO HAVE A LAWN MAINTENANCE CONTRACTOR DO THE MOWING, TRIMMING AND EDGING OF YOUR LAWN?**

- 86%** A well-manicured lawn adds value to my/our home
- 83%** The contractor keeps the yard looking better than I/we could
- 59%** Most people in the neighborhood use a contractor
- 58%** I/we have things to do other than spending time working in the yard
- 48%** I/we dislike yard work
- 45%** I/we have health issues that keep us from doing the work

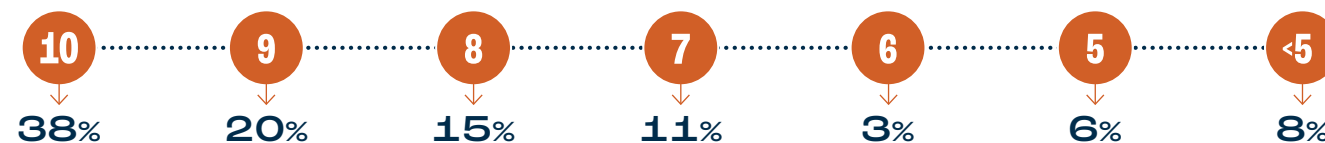
DOES THE LAWN MAINTENANCE CONTRACTOR WHO DOES THE MOWING, TRIMMING AND EDGING OF YOUR LAWN DO ANY OF THE OTHER LANDSCAPE/HARDSCAPE WORK FOR YOU?



WHICH OF THE FOLLOWING OTHER YARD MAINTENANCE/UPGRADE ACTIVITIES DOES THE LAWN MAINTENANCE CONTRACTOR PROVIDE FOR YOU?

- 56%** Annual or semi-annual activities (mulch, aeration, overseeding, tree/shrub trimming, etc.)
- 50%** Application of fertilizer, weed control, pest control products, etc.
- 32%** Landscaping (new planting areas, planting flowers, shrubs, trees, etc.)
- 12%** Hardscaping (walkways, patios, outdoor kitchens, etc.)
- 10%** Snow and ice removal

HOW LIKELY ARE YOU TO RECOMMEND THE LAWN MAINTENANCE CONTRACTOR CURRENTLY DOING THE MOWING, TRIMMING AND EDGING OF YOUR LAWN TO FAMILY AND FRIENDS? (10=EXTREMELY LIKELY)





Education in lawn care seems more important than the services, doesn't it? After all, there could be a lot of questions about the product you are using on a customer's lawn from the customer, and maybe more importantly, from your customer's neighbors. That's not to mention how your technician is setting expectations of what their lawn will look like during treatment. The good news is 83% of those who have hired a contractor said they feel they have been properly educated by their LCO.

You want more good news? In 2016, only 36 were classified as promoters of their lawn care service, but now that number jumps to 50% with only 17% falling into the detractor category.

Some potential bad news: Of the number of people who said they perform lawn care at their home, only 18% have a contractor do it, down from 28% in 2016. However, there is more interest in the lawn as those who take care of their own lawn care increased by 22% to 72% this year. Only 10% said they do no lawn care compared to 22% in 2016.

WHAT ARE YOUR EXPECTATIONS FOR YOUR YARD WHEN YOU HIRE A LAWN CARE CONTRACTOR?

- 53%** Some weeds and insects are OK, as long as the company comes back and re-treats
- 27%** Absolutely no weeds and no insects
- 20%** Some weeds and insects are OK, and the lawn care operator will get to it on the next visit

*HOW INFLUENTIAL ARE THE FOLLOWING AS MOTIVATIONS TO HAVE A LAWN CARE CONTRACTOR APPLY THE FERTILIZER, WEED KILLER AND/OR INSECT CONTROL PRODUCTS?

- 92%** Contractor has the knowledge of which products to use to keep my yard looking its best
- 83%** Contractor gets better results than I/we ever could
- 80%** Contractor has access to more effective products than I/we can get in the store
- 67%** I/we have things to do other than spending time working in the yard
- 62%** I/we would prefer not to be in direct contact with the chemicals
- 59%** Most people in the neighborhood use a contractor
- 44%** I/we dislike yard work
- 41%** I/we have health issues that keeps us from doing the work

HOW MUCH DO YOU SPEND ANNUALLY ON LAWN CARE (FERTILIZER, WEED CONTROL, INSECT CONTROL, ETC.)?

- 8%** More than \$2,000
- 12%** \$1,000-\$1,999
- 14%** \$500-\$999
- 36%** \$100-\$499
- 30%** Less than \$100



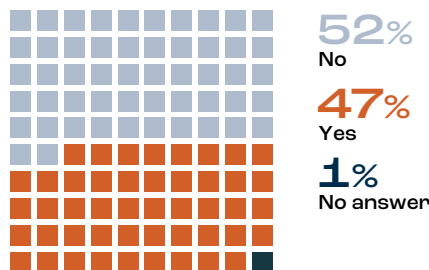
IF YOU ARE PLANNING A MAJOR HARDSCAPE PROJECT, HOW LIKELY ARE YOU TO HIRE A PROFESSIONAL CONTRACTOR TO DO THE WORK?

- 50%** Extremely likely
- 29%** Somewhat likely
- 13%** Somewhat unlikely
- 8%** Very unlikely

***HOW INFLUENTIAL ARE THE FOLLOWING AS MOTIVATIONS TO IMPROVE YOUR HARDSCAPE?**

- 80%** The ability to enjoy the outside space
- 77%** A sense of personal pride
- 76%** Adding to the home value
- 66%** Having an outdoor entertainment area
- 48%** Fitting in with the neighbors, meeting their expectations

IN THE PAST FIVE YEARS, HAVE YOU DONE A MAJOR LANDSCAPING PROJECT (added trees, developed new planting areas, replaced a lawn, etc.) ON THE PROPERTY OF YOUR PRIMARY HOME?



SURVEY METHODOLOGY: Lawn & Landscape partnered with Readex research who utilized Dynata's panel, targeting homeowners, aged 18 and older living in the U.S. The survey was fielded between Feb. 9-16 with 576 valid responses. Respondents are adults who own their own homes and are the primary decision-maker when it comes to hiring a landscaper or lawn care operator. **Note:** Not all graphs equal 100%.

↓
Design/build contractors should be busy over the next couple of years; at least busier than when we last did the survey in 2016. Back then, only about 25% said they were planning a major hardscape project (adding walkways, patio, outdoor kitchen, etc.) on the property of their primary home in the next two years. Today, almost 40% said they plan on such a project in the next two years. The numbers also reinforce those who plan on a project would be likely to hire you.