

This presentation premiered at WaterSmart Innovations

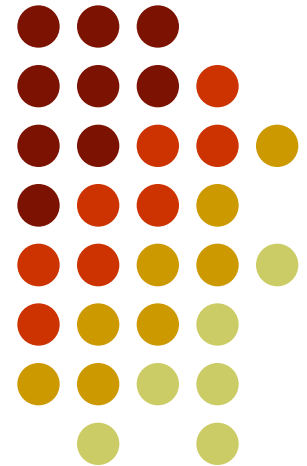
watersmartinnovations.com



Market Research in Practice

**Opportunities & Constraints of the Target Market:
Water Efficiency and On-Site/At Source
Stormwater Management**

*Water Smart Innovation
October 6, 2010*



Presentation Overview



- Highlights of residential market research studies
- How market research changed the Region of Peel's program
- Development of new program components
- Monitoring and preliminary feedback
- Lessons learned

Market Research Studies



- 4 studies represent a total sample size of 250 owner-occupants of single-family residential dwellings across GTA municipalities.
- Over 80,000 responses analysed.
- Very high, statistically significant, correlation of responses across all four study samples.

Methodology – Research Sample



- Research testing for:
 - Values and perceptions as they pertain to residents' home landscape, water use, lot-level stormwater management BMPs, and sustainable practices.
 - Landscaping practices and other issues related to water use and lot-level stormwater management.
 - Where residents go and who do they trust for landscape related advice.
 - Constraints and opportunities within the target market.
 - INTRINSIC HELD BELIEFS - What are they? Why are the important?

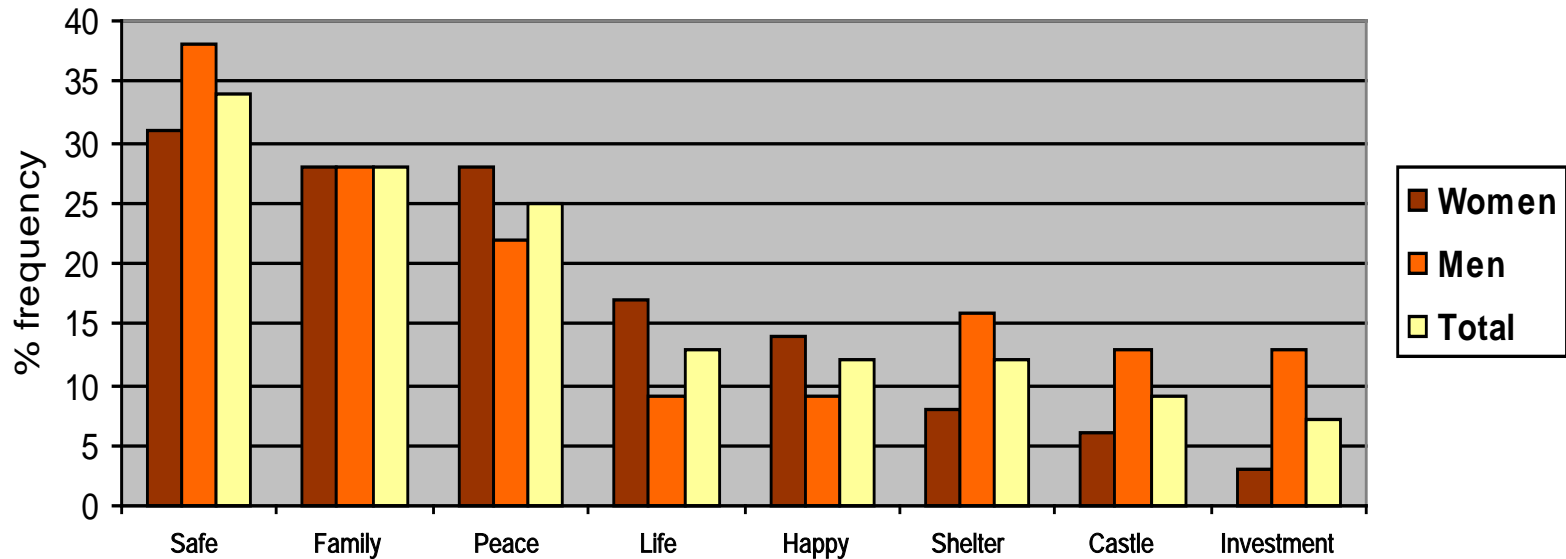


RESIDENTIAL MARKET RESEARCH

HOME & LANDSCAPE - MISSISSAUGA



What does your home mean to you?

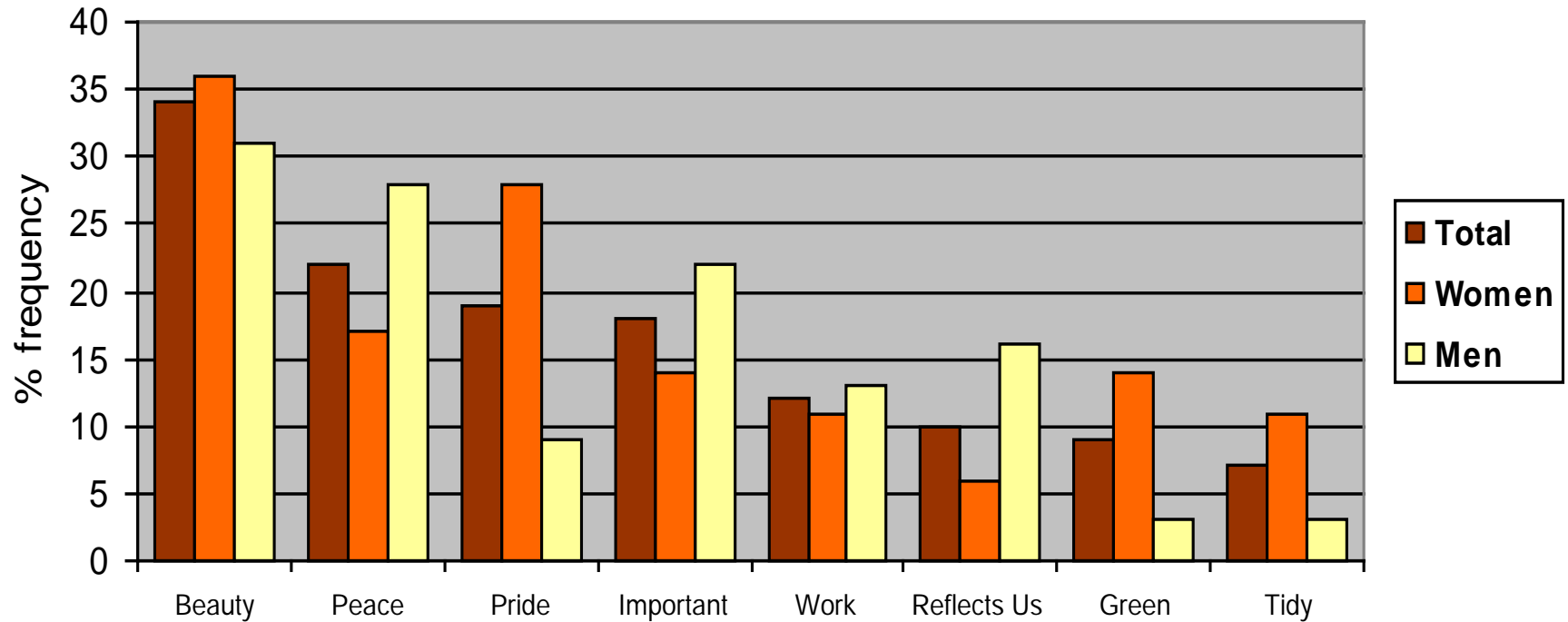


RESIDENTIAL MARKET RESEARCH

HOME & LANDSCAPE - MISSISSAUGA



What does your home's landscape mean to you?



Market Research: Key Findings

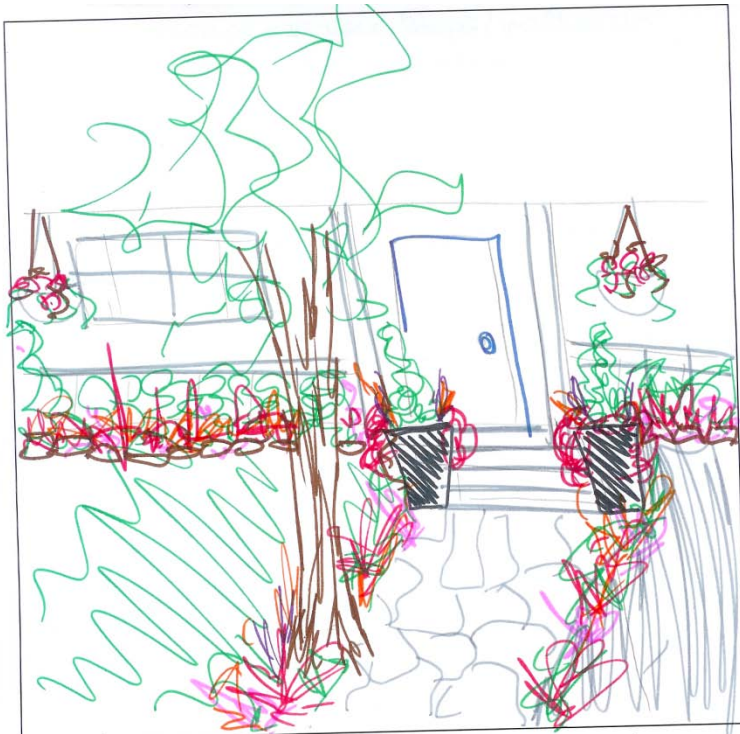


- Very negative perceptions of “water efficient”, “natural”, “naturalized”, “sustainable”, and “water wise” landscapes
- Limited understanding of “native plants”, “watersheds”, and “water wise” or “water efficient” gardening/landscaping;
- Strong emotional connection to their home and landscape with aesthetics the principal driver for the decisions they make regarding their landscape;
- “Beauty” is identified as the most important quality of resident’s home landscape.

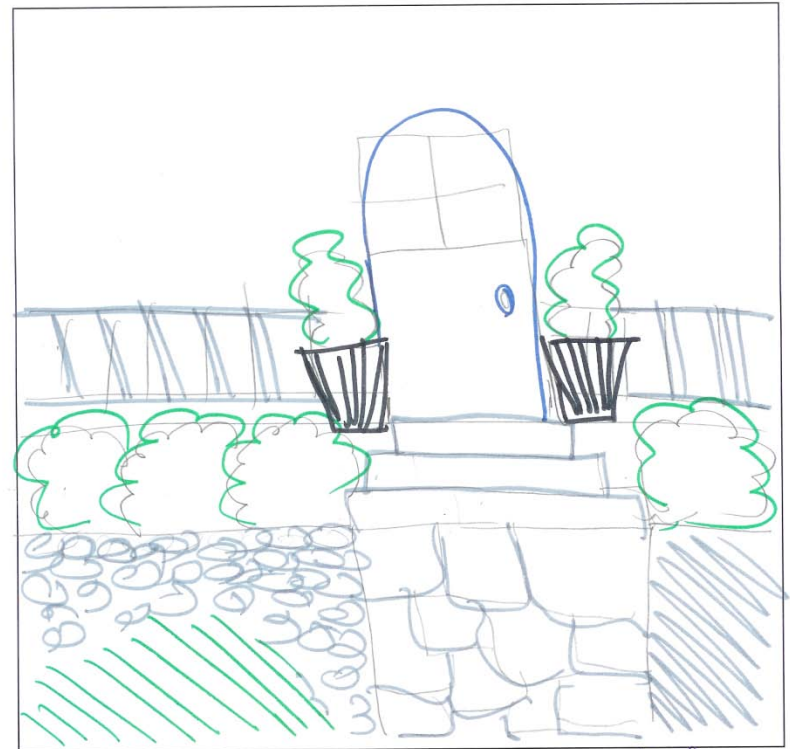
EXAMPLES: RESIDENTS' PERCEPTIONS



"Ideal" landscape



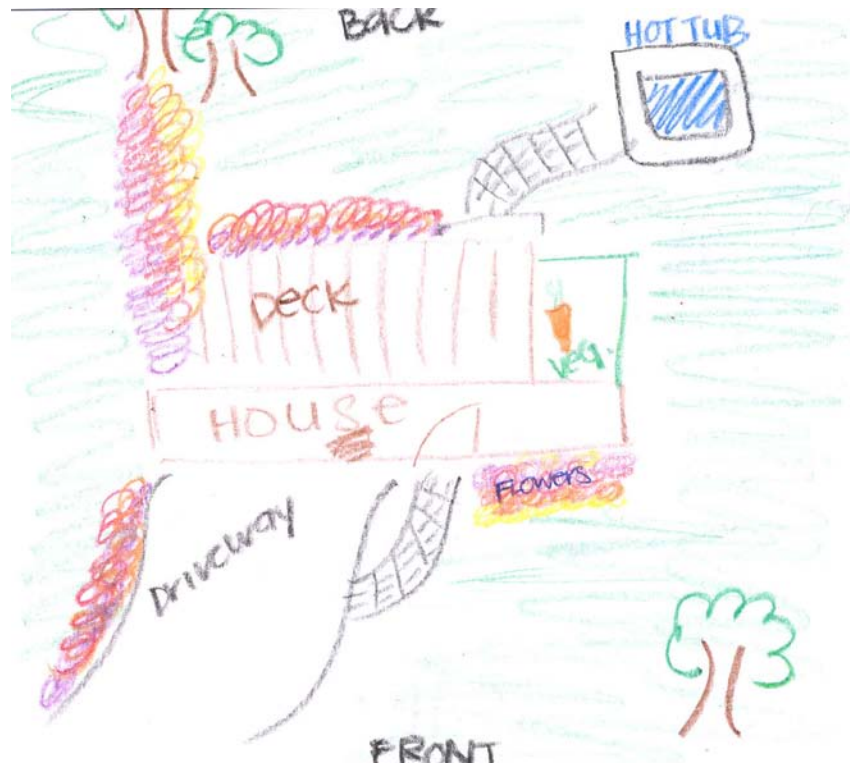
"Water Efficient" landscape



EXAMPLES: RESIDENTS' PERCEPTIONS



"Ideal" landscape



"Natural" landscape



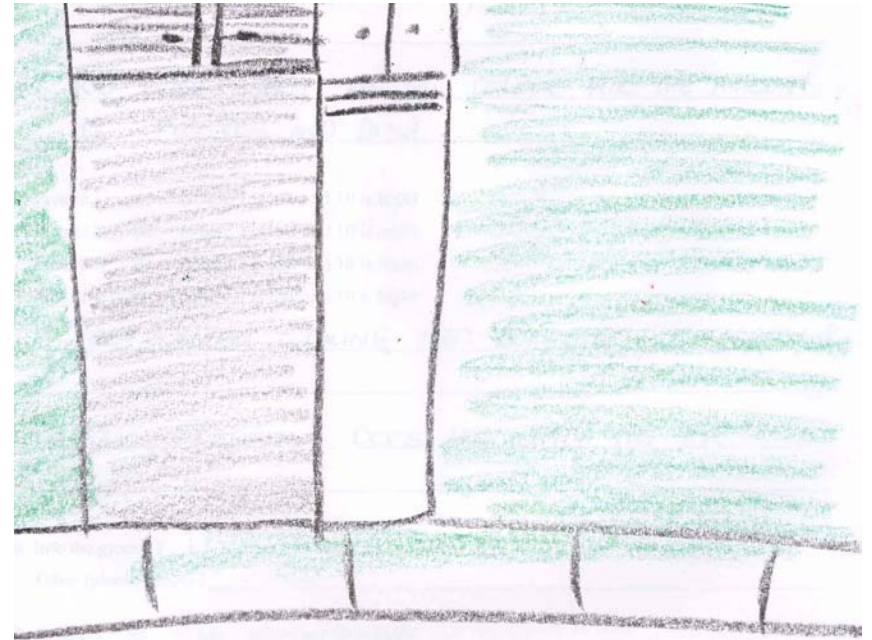
EXAMPLES: RESIDENTS' PERCEPTIONS



"Ideal" landscape



"Sustainable" landscape

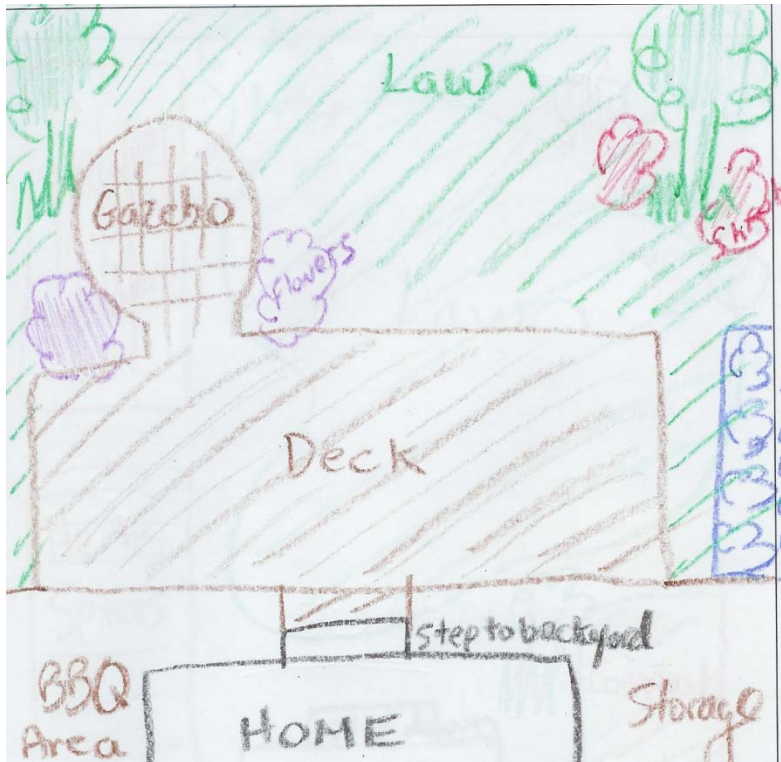


RESIDENTIAL MARKET RESEARCH

“IDEAL” VS “NATURALISED”



“Ideal” landscape



“Naturalised” landscape



TYPE 1 – Incremental change (50/121 or 41%)

RESIDENTIAL MARKET RESEARCH

“IDEAL” VS “NATURALISED”



“Ideal” Landscape



“Naturalised” Landscape



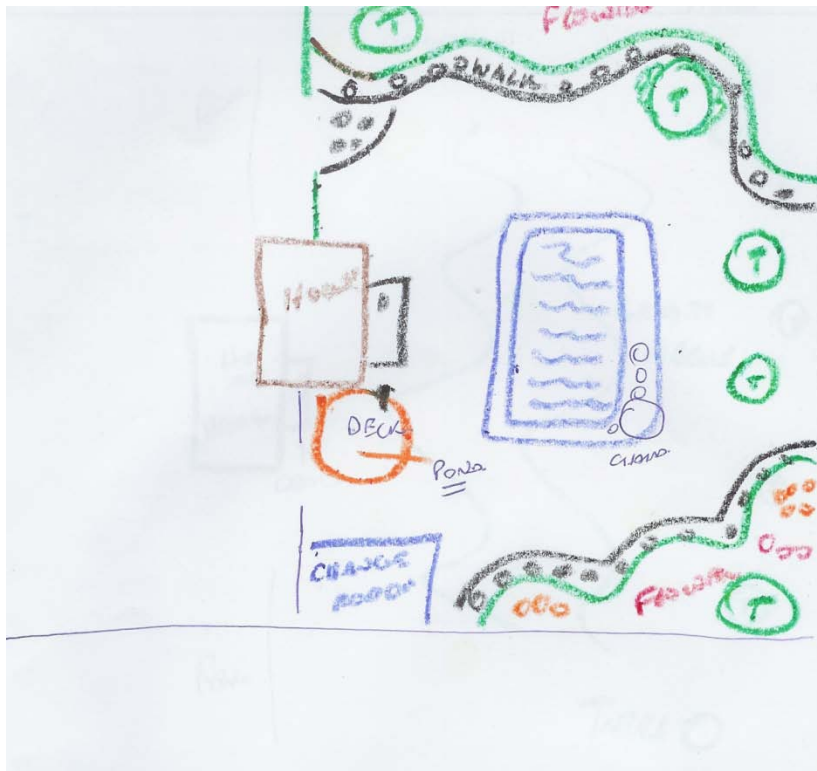
TYPE 2 – Less colourful (30/121 or 25%)

RESIDENTIAL MARKET RESEARCH

“IDEAL” VS “NATURALISED”



“Ideal” Landscape



“Naturalised” Landscape



TYPE 3 – Chaotic (26/121 or 21%)

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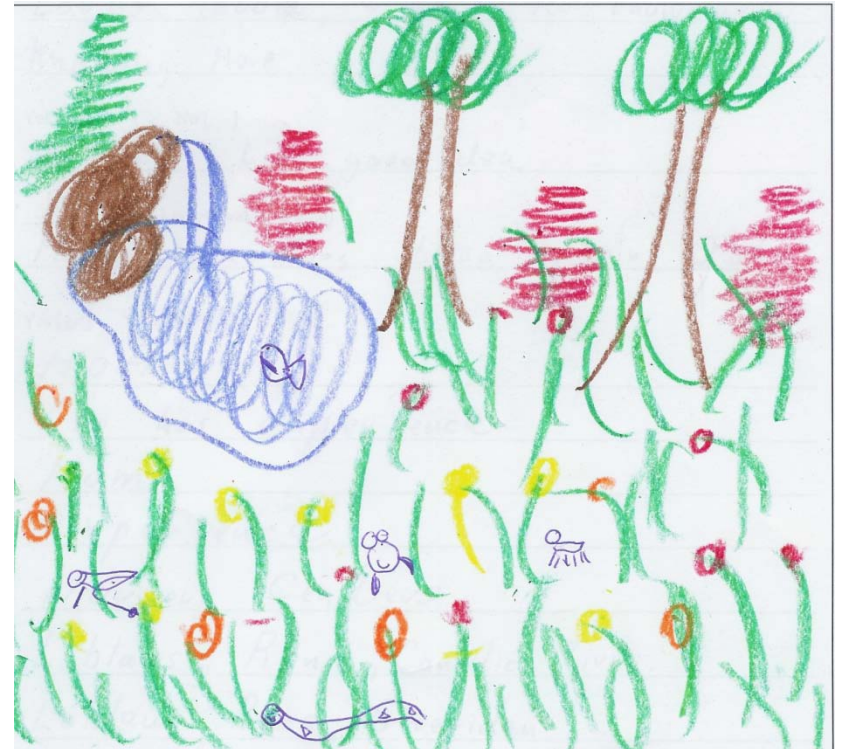
“IDEAL” VS “NATURALISED”



“Ideal” Landscape



“Naturalised” Landscape



TYPE 4 – Nature positive (12/121 or 10%)

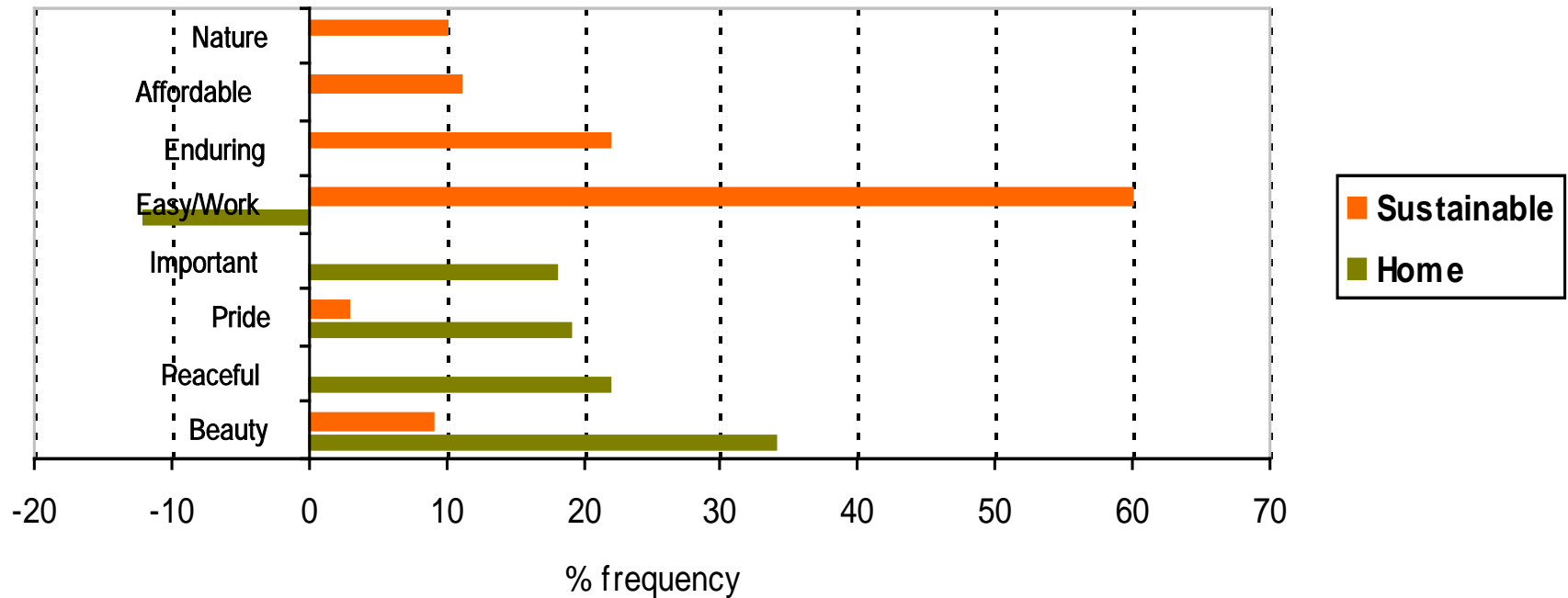
Freeman Associates

RESIDENTIAL MARKET RESEARCH

“IDEAL” VS “SUSTAINABLE” LANDSCAPE



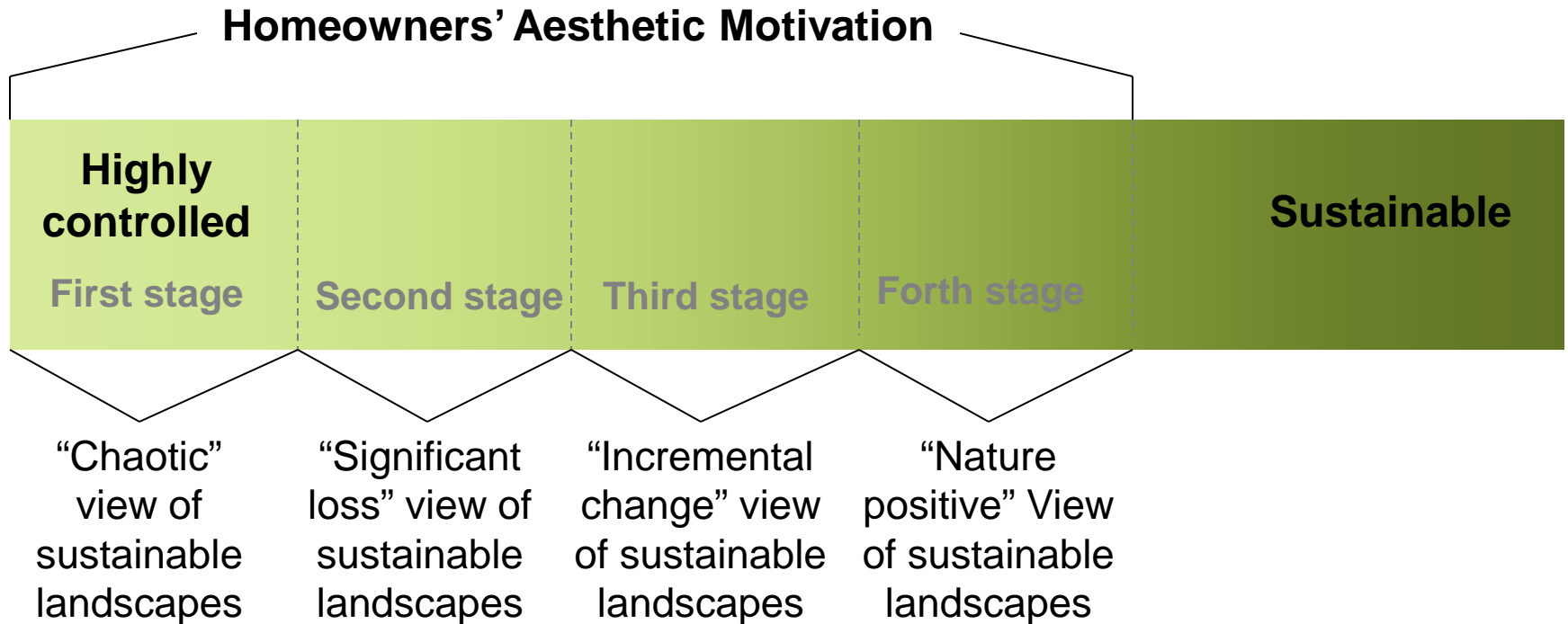
What does your home's/a sustainable landscape mean to you?



RESIDENTIAL MARKET RESEARCH BARRIERS TO SUSTAINABLE PRACTICES



SPECTRUM OF RESIDENTIAL LANDSCAPE AESTHETIC



Barriers to Water Efficiency



- Aesthetics (“beauty”) is the principal driver for decisions homeowners make regarding the design and maintenance of their home landscape.
- This deeply held aesthetic motivation defines a beautiful landscape as one with:
 - A manicured, green, weed-free lawn
 - Lots of colour, primarily provided by flowers (principally annuals)
 - A neat, tidy appearance
 - Good design and an organised layout
- This underlying aesthetic motivation leads homeowners to unsustainable behaviours.
- **Residents’ motivations are emotional, not rational.**

Examples: Response to Photos - Backyards



6.7/10



7.2/10



8.5/10



6.7/10



Examples: Response to Photos - Gardens



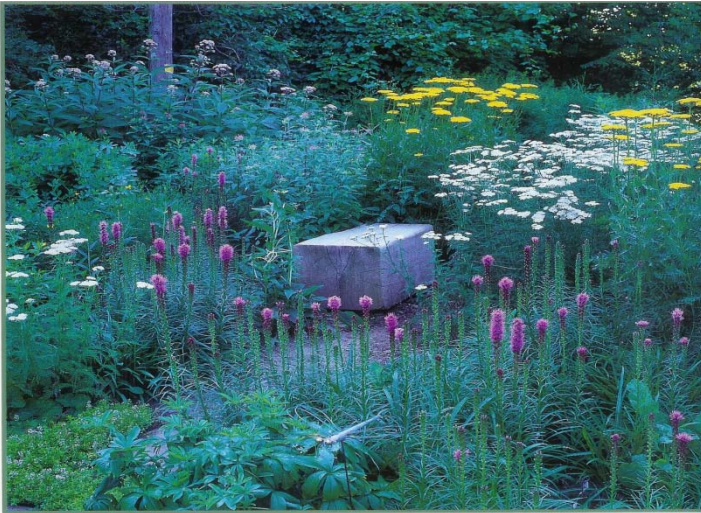
7.2/10



6.4/10



6.5/10



5.8/10



Testing the Market Research



- Sustainable Residential Landscape Study in a residential area in the Region of Peel in the Greater Toronto Area
- First study of its kind in Canada
- 3 to 5 year study of the effects of new sustainable residential landscape design and outdoor water use.
 - Marketing and Promotion
 - Landscape Consultation Service
 - Community Visioning and Outreach
 - Fusion landscapes and Feature Homes Demos
 - Strategic Partnerships
 - Monitoring and Evaluation

Testing the Market Research



- Focus on single-family residences which represent highest outdoor water users on a per capita basis
- Homes in the area are of mixed age (1950s through 1990s) and represent a typical suburban community of existing homes.
- The demographic is mixed:
 - blue collar, high school/college education, middle income
 - white collar, university educated, ranging from upper-middle to upper income

How Peel Revised it's Program



WATER
EFFICIENCY
EDUCATION
AND
OUTREACH
PROGRAM

Integrating Market Research



MARKETING
CAMPAIGN AND
OUTREACH
PROGRAM

How Peel Revised it's Program



PROGRAM IDENTITY:





How Peel Revised it's Program

LEAD MESSAGES:

- Water one-half inch twice a week
- Water Wise Wednesdays
- Water before 10 AM and after 4PM
- Use a rain gauge
- Plant native or drought tolerant plants
- Apply compost and mulch
- Aerate and top-dress lawn



Integrating Market Research

- Your fusion garden oasis awaits
- Imagine the beauty of your own fusion landscape
- Considering your wants and needs
- Sketching out your dream garden
- Selecting sensational plants and flowers
- Creating your very own fusion garden

How Peel Revised it's Program



Landscape Assessment Service:

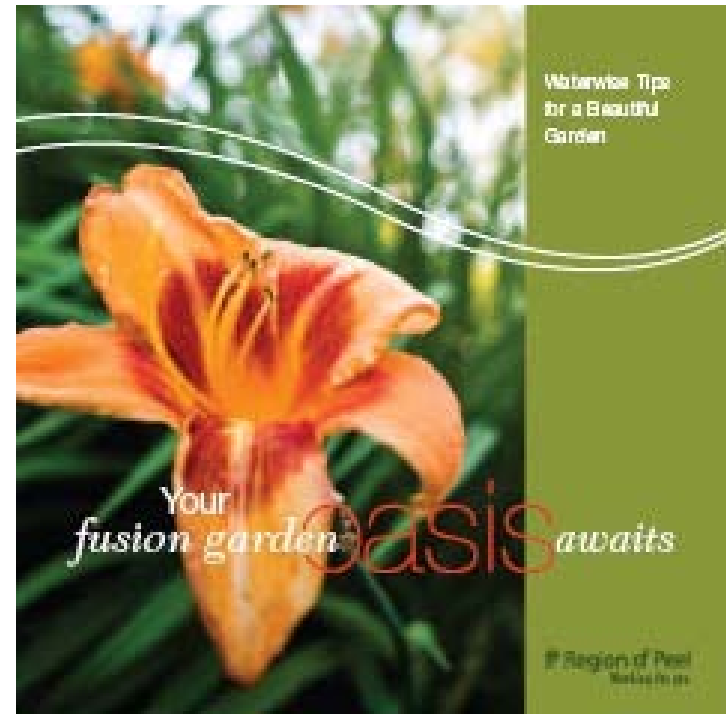
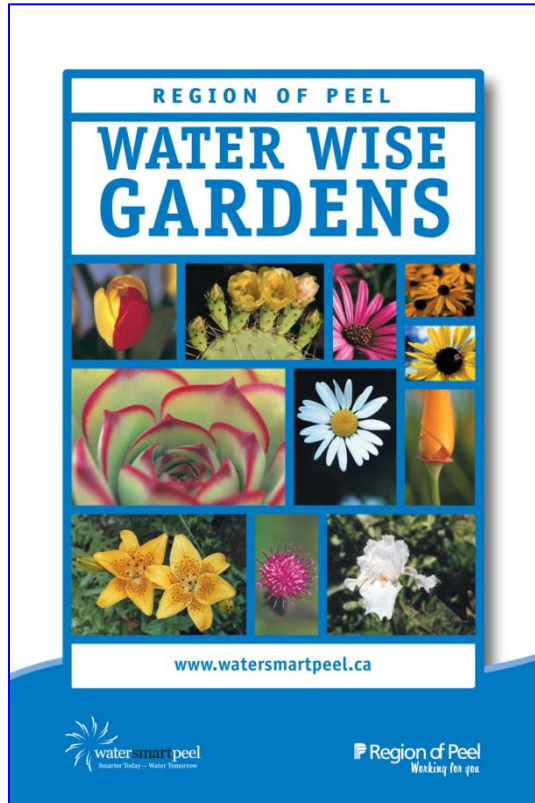
- Focus on outdoor water saving approaches and tips
- Lawn and garden care advice to reduce water use
- Tools ; rain gauge and outdoor watering conservation kit



Integrating Market Research

- Capturing residents' vision for their front and back yard
- Provide an overall landscape plan for front and back yard
- Plan includes landscape sketch, plant list and placement
- Integrate resident's vision with water efficient landscape designs and recommendations
- Meet aesthetic, maintenance and functional needs

How Peel Revised it's Program



How Peel Revised it's Program



Plant high water users like begonias, roses, fuchsia and vegetable plants together, and close to the house where water is easily accessible. Drought-tolerant plants can be placed together further from the house, where water is not as accessible.

View

Are there views you want to protect or screen? Will the plants you've chosen block or screen other plants, or a view you are trying to preserve? Know the mature size of the plants you select to maintain the views and screening you desire.

Time

How much time do you want to spend maintaining your landscape? If you would rather enjoy your yard than work on it, choose low-maintenance plants.



2. Soil Conditioning

A soil's structure reveals its character. A simple soil analysis will determine what, if any, improvements need to be made to your soil. For some soil types, soil conditioning is vital to a successful garden site. If landscaping with native plants, soil supplements may not be necessary. Some well-adapted plants prefer not to have too rich a soil. For these plants, loosening the soil is all the preparation that is needed. Buy native plants available at local nurseries. Do not take plants from the wild.

Soil Analysis

Take several spoonfuls of dirt from your garden and place them in a glass jar, preferably one with a lid. Add 500 ml (2 cups) of water. Mix the soil well with the water. Place the jar on a shelf where it will not be disturbed. After a few hours check your sample and use the soil guide below to identify your soil type.

There are four basic soil types and each requires different treatments to improve its structure, fertility and texture. The following describes the different soil types:

Loam soil: Has a balance of clay, sand and silt particles, and is the ideal soil for all types of gardening.

Sandy soil: Has a larger percentage of sand (approx. 1/3 sand). It can dry out very fast, is low in organic matter and tends to leach nutrients readily.

Silt soil: Has a larger percentage of silt (approx. 1/3 silt). It is very slow to warm up and dry out in the spring, delaying planting. Organic matter breaks down quickly, and there is a high risk of erosion by both wind and rain.

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Rocks and stones will settle out first, followed by sand, clay and then silt. Organic matter will float on top or settle as a fine dark layer over the silt.

Clay soil: Has a larger percentage of clay (approx. 1/3 clay). It is very slow to warm up and dry out in the spring, delaying planting. It becomes hard and cement-like when dry, and has a high risk of compaction when wet.

Soil Improvements

Compost: There is a simple way to improve soils with less-than-ideal textures. Whether a soil is sand, clay, silt or loam it can be improved with a generous amount of organic material such as compost, manure, shredded leaves or peat moss. The presence of organic material is the key to retaining water in your soil, and it won't interfere with soil drainage.

Compost reduces waste and is an environmentally beneficial practice. The Region of Peel produces compost through its curbside organics programs. This compost can be purchased in bulk or bags at one of the Region's Community Recycling Centres.

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How Peel Revised it's Program



Appreciating the *lay of the land*

When you begin decorating a room in your home, it's a good idea to survey the space and ask some basic questions: What is its size and height? How is it lit? What landmarks – like a fireplace, bookshelf or beam – do you need to plan around?

A similar philosophy applies to your outdoor landscape: take a time out, tune out the noise, tune in to your garden and listen to what it's telling you.

You can start by grabbing a pad and pen, putting on your thinking cap and strolling around your garden as if for the first time.

Form meets function

Like your home, your garden should offer you a healthy balance of pleasing aesthetics and functional space. Do you need more space for the kids to play, or for your dog to run? Is it a good idea to have a spot for barbecuing, entertaining, or storing gardening equipment? Knowing how to balance aesthetics with functionality is key to a successful fusion landscape.

The importance of exposure

Study your yard carefully at different hours of the day and even a variety of times during the year. Which areas are most affected by the sun, shade and wind? All three can stunt plant growth or cause damage and are important factors in designing your fusion landscape and choosing the types of plants and flowers you introduce.

tune in

Water is life

Water can be a garden's most precious, overused and misunderstood resource. Even a barely noticeable slope can have a huge impact on how your property drains and how much water is needlessly lost. Keep an eye out for low-lying areas. Are there places where water pools in wet weather? Do you notice a slope or hillside that gets very dry in the summer? These can be ideal areas for particular fusion landscaping techniques.

Your rich earth

Kneel down and dig into the soil with your fingers or a small spade. Is the soil hard or soft? Along with your garden's exposure and drainage, the success of your plants and flowers may ultimately depend on the health of your soil. Adding compost each year improves your soil, delivering rich nutrients to your plants and increasing the success of your fusion landscape.



How Peel Revised it's Program



Creating your very own *fusion garden*

Now it's time to blend these steps into one and create a fusion landscape that – *be it vibrant and dramatic, or comfortable and serene* – is above all else eco-chic, water efficient and uniquely you.

1 Start by imagining your ideal garden and how you can bring together the best of traditional and modern landscaping into a lush and beautiful oasis.

2 Next, survey your space and tune in to how the area around your home functions and is affected by the elements.

3 Then, plan your garden spaces and feed your earth by adding a rich layer of compost every year,

remembering to spread mulch over your beds after planting to retain moisture and prevent weeds.

4 Afterwards, put together a wish list of the kinds of hardscape features – like a deck, pathway or fence – that might be well suited to your space.

5 Finally, use the list included in this brochure to choose plants with the colours and textures that will help you to create the garden oasis of your dreams.







How does your garden grow?

Add
fusion plants to
your garden

www.watersmartpeel.ca
Region of Peel
Working for you

1296

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Sustainable Landscape Study



- Critical to monitor the progress and patterns of water use to effectively determine program impact and success
- Comprehensive monitoring and evaluation:
 - Areas include; study, control and sub control
 - Benchmark and historical water use data
 - Weekly water meter reading (sample)
 - Video and photographic catalogue of all homes in the study

Lessons to Date



- Out of the box initiatives mean longer approval times with required revisions and compromises – be prepared with the business case.
- Secure program support from senior management and political leaders.
- Adapt as necessary: emotionally-focused marketing and advertising is new for municipalities and will require time to adapt.
- New approaches require on-going program modifications and continuous improvement.

What we've learned



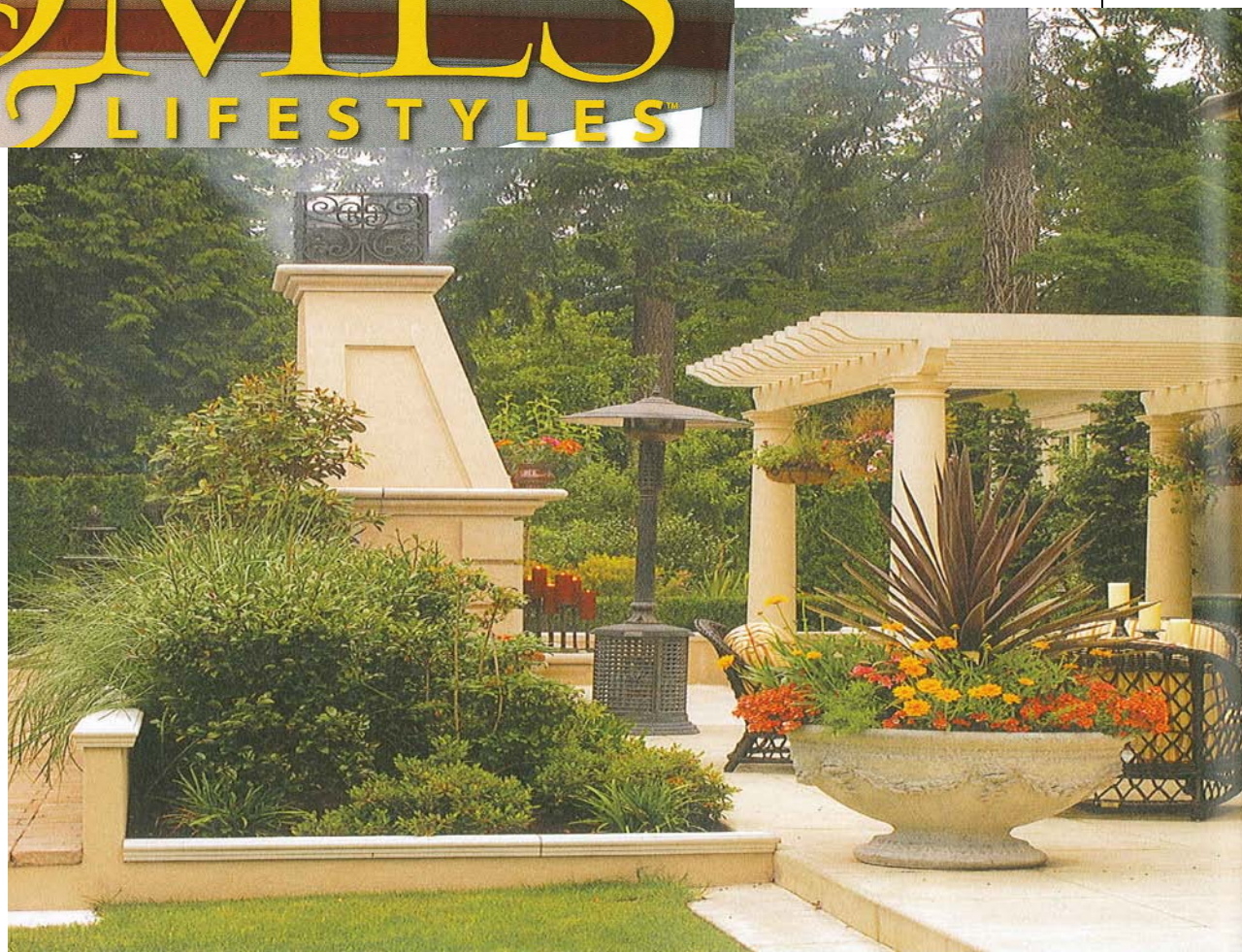
- Before we can expect homeowners to change their home landscape and the ways in which they maintain it, we must first capture their interest.
- Marketing must come before education – reach individuals on an emotional and intrinsic level and they will seek information.
- Create buzz and excitement – a new renaissance in landscape design – “fusion landscapes: the latest trend in residential landscapes”.
- Give homeowners an aesthetic vision they can embrace while making the right environmental choice.
- Appreciate that eco-chic is a step toward real, meaningful environmental thinking and action.
- Once individuals experience the beauty and vibrancy of a sustainable landscape, they will move along the continuum of environmental stewardship.

PORTLAND'S HOME GARDEN AND LIFESTYLE MAGAZINE

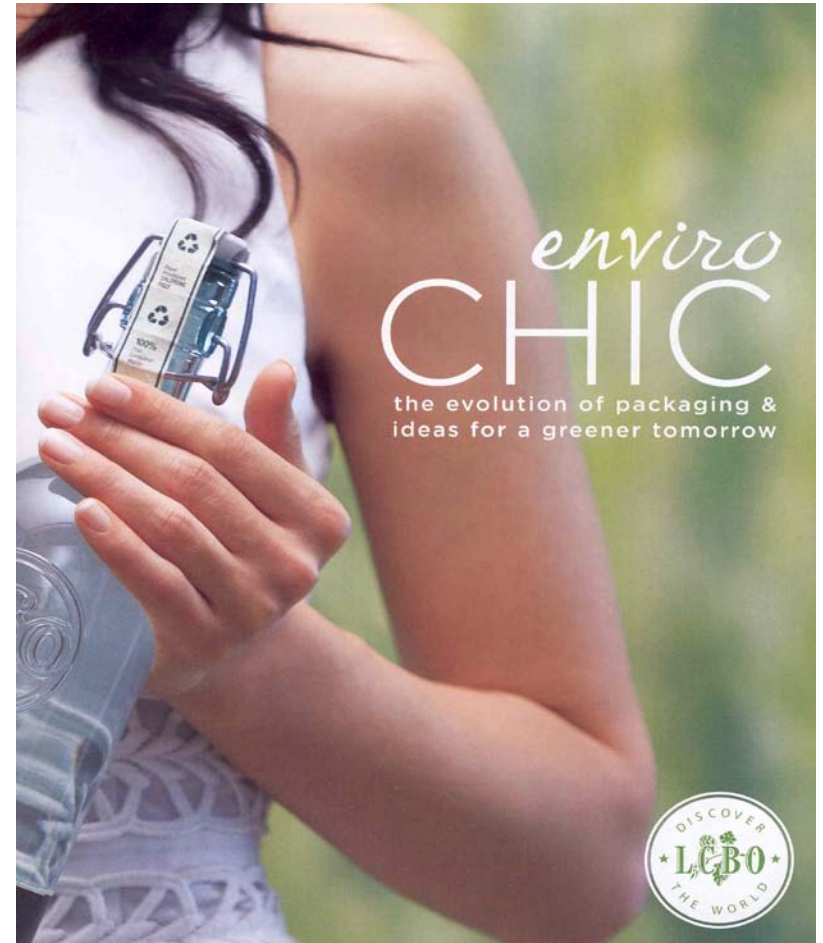
PORTRAIT OF PORTLAND™



SEATTLE HOMES & LIFESTYLES™



WHERE TO BEGIN?



Your fusion garden oasis awaits...



dream



QUESTIONS?