

Biodiversity – Category behaviour and awareness study

Husqvarna

Agenda

- Introduction to project
- Executive summary and recommendations
- Biodiversity awareness and behaviour
 - Across markets
 - Sweden - *slide 24*
 - Denmark - *slide 38*
 - UK - *slide 52*
 - Germany - *slide 66*
 - France - *slide 80*
 - Netherlands - *slide 94*
 - Belgium - *slide 108*
 - Poland - *slide 122*

Project background* and main questions to be answered in the project



Project background

Husqvarna wants to understand the general knowledge about biodiversity and how it affects the purchase of garden equipment.



Main questions to be answered in the project

- Do people feel that their garden has an impact on biodiversity?
- Do people have a good knowledge of the importance of biodiversity?
- Do people mow their lawn with biodiversity in mind?
- Do people design their garden with biodiversity in mind?

Project specification

INTRODUCTION TO PROJECT

2/2



Research methodology:

- Online interviews (quantitative)
- Field period: 2022-05-16 – 2022-05-23



Markets: Sweden, Denmark, Germany, France, UK, Poland, Belgium, Netherlands.



Sample: National representative samples in the ages 30-65 years, only people who have a garden participates in survey. Incidence rate ~40% of full population.



Number of interviews (IP):

Sweden	501 IP
Denmark	506 IP
UK	505 IP
Germany	504 IP
France	503 IP
Netherlands	502 IP
Belgium	502 IP
Poland	503 IP

Project deliverables:



- Results report (this document)
- Table reports in excel



Survey:

- Survey designed by Husqvarna
- Definition of biodiversity presented to the respondents in survey:

Biodiversity, also called biological diversity, is the variety of life found in a place on Earth or, often, the total variety of life on Earth. A common measure of this variety, called species richness, is the count of species in an area. Biodiversity also encompasses the genetic variety within each species and the variety of ecosystems that species create.

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Summary and recommendations

- There seems to be a correlation between familiarity of the term biodiversity, concern about the decreasing biodiversity and actions taken in the own garden to boost and prevent biodiversity. Two clear examples are Germany and Denmark, which are the two extremes in this study. People in Germany are the most educated in the subject and they are also the ones that have taken most action so far. On the other hand, people in Denmark are less aware of and concerned about biodiversity. They are also less interested in learning more about the subject and take less actions.
- A better understanding of biodiversity and relevant actions to take would both reduce barriers and facilitate increased focus on biodiversity.

> Nepa recommends Husqvarna to focus on spreading awareness and knowledge about biodiversity. Due to different (biodiversity) maturity levels in each market, Nepa believe Husqvarna would benefit from adopting their communication slightly. Not by creating different campaigns in each markets, but rather by tweaking messages and/or other elements that can fine tune the communication on each market to make it more effective.

E.g.

- People in Sweden and Netherlands have relatively high awareness but tend to not think about biodiversity. Here, Husqvarna should focus on communication that *reminds* the consumer of the subject.
- People in UK, France and Belgium don't know how to make their gardens more biodiverse. Here, Husqvarna should focus on *educating* the target audience.
- People in Denmark and Poland don't prioritize biodiversity. Here the communication should focus on *why* biodiversity is important.

Agenda

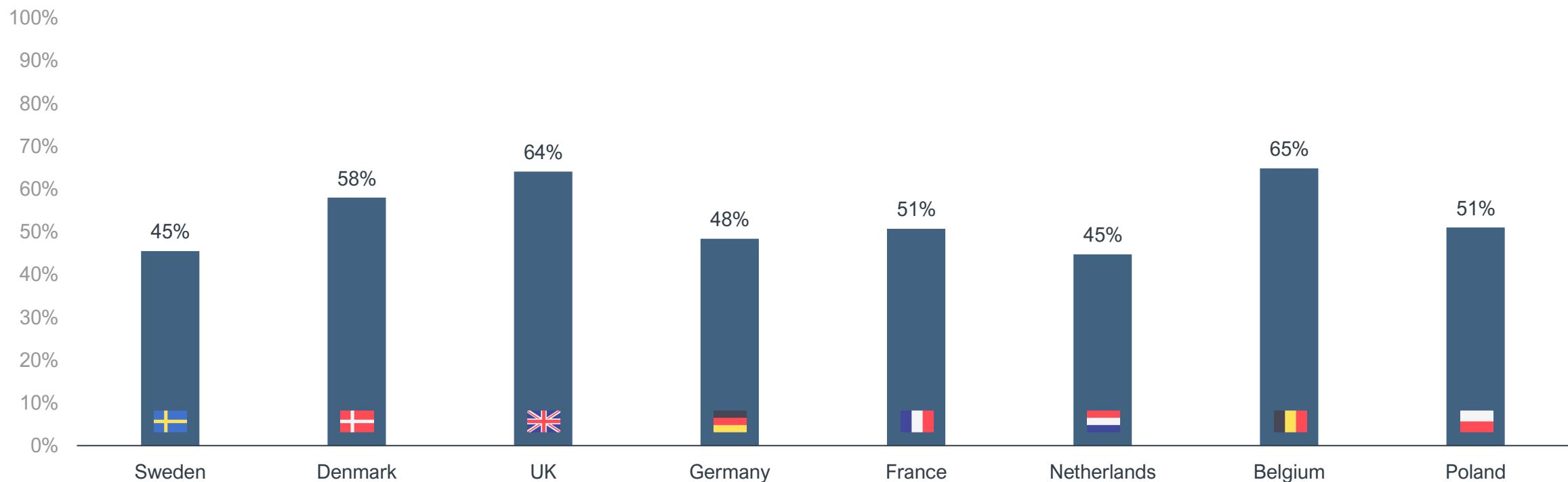
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Belgium and UK have the highest share of people who own a garden with a lawn

Overview potential market

1/1

Share of the countries' populations that states they own a garden with a lawn



Base: Sweden - 1111 IP, Denmark – 838 IP, UK – 786 IP, Germany – 1051 IP, France – 996 IP, Belgium – 777 IP, Netherlands – 1145 IP, Poland – 1001 IP

Q: Which of the following statements are correct when describing your home? (I own a garden with a lawn)

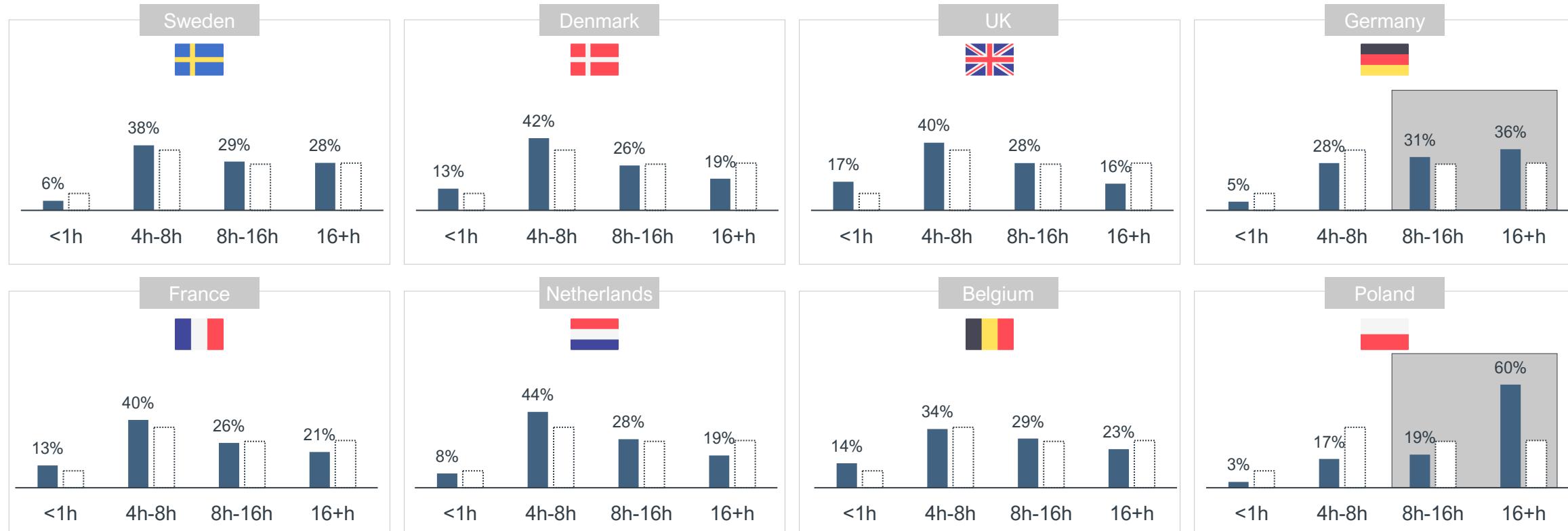
People in Poland and Germany spend more time on gardening compared to others. In the other markets 4-8h / month is most common

Garden behaviour

1/3

Time spend gardening during season, hours per month

■ Per country □ Total (avg country)



Base: Total – 4026 IP, Sweden - 501 IP, Denmark – 506 IP, UK – 505 IP, Germany – 504 IP, France – 503 IP, Netherlands – 502 IP, Belgium – 502 IP, Poland – 503 IP

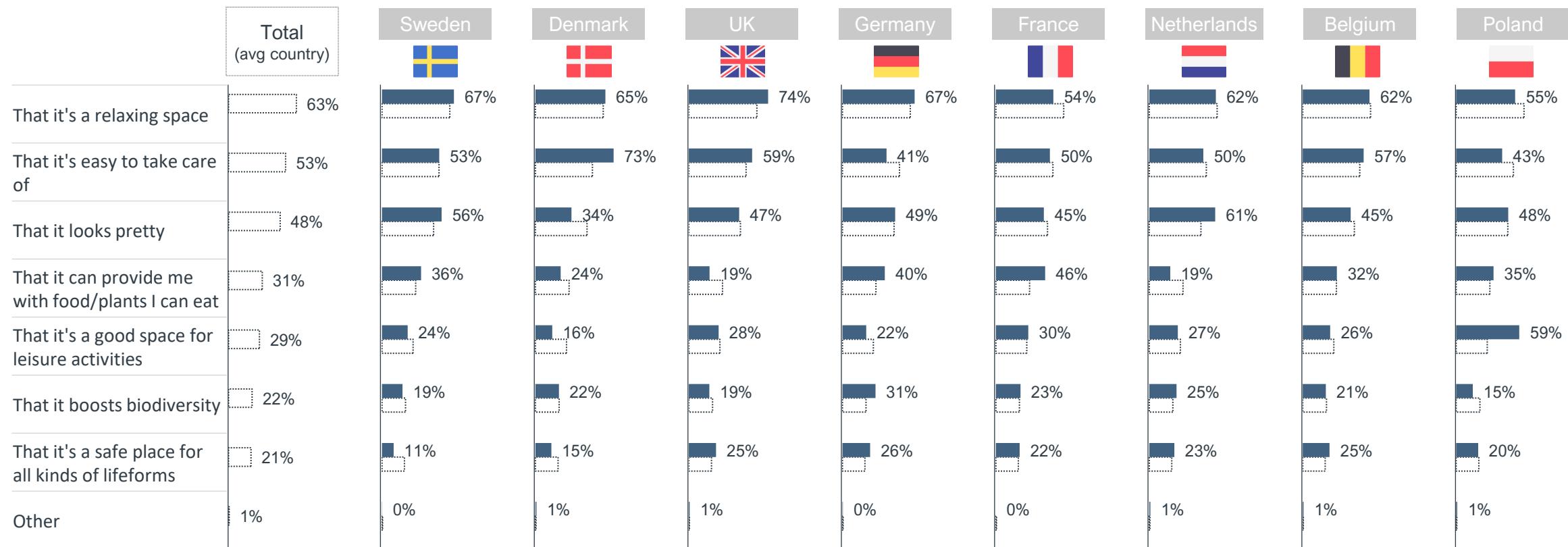
Q: How much time do you spend gardening during the gardening season (i.e. spring/summer/autumn)?

Top priority when designing a garden is that it's a relaxing space, boosting biodiversity is not as prioritized

Garden behaviour

2/3

Top priorities when designing garden



Base: Total – 4026 IP, Sweden - 501 IP, Denmark – 506 IP, UK – 505 IP, Germany – 504 IP, France – 503 IP, Netherlands – 502 IP, Belgium – 502 IP, Poland – 503 IP

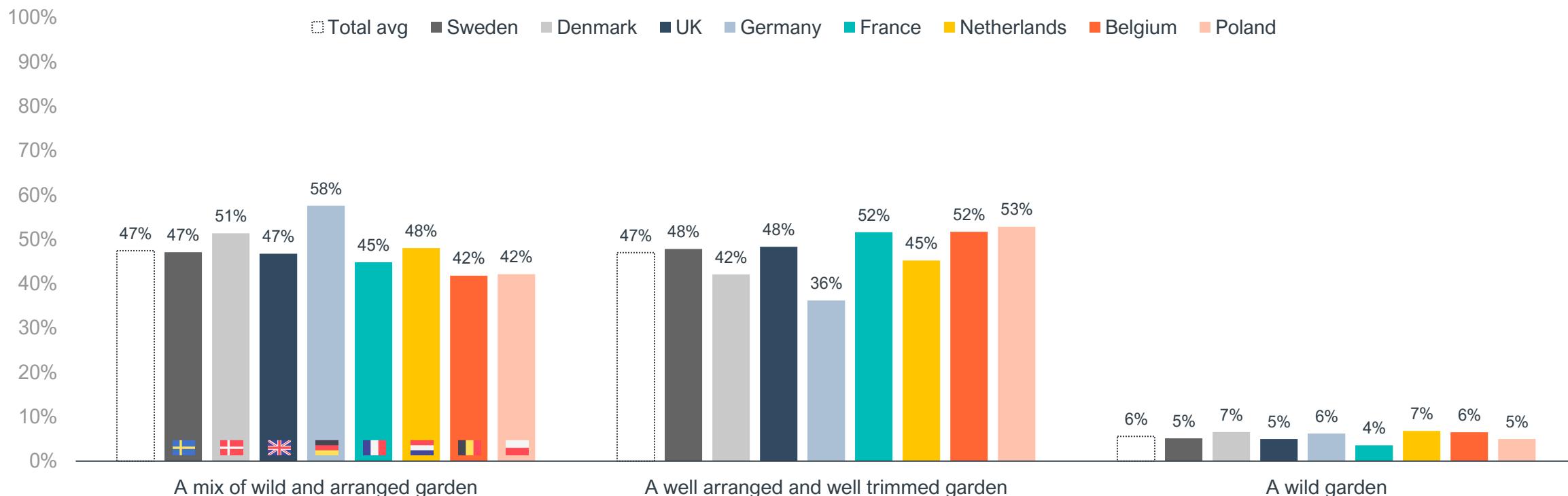
Q: What are your top priorities when designing your garden? (Possible to choose max 3 options)

It's clear that people either want a well trimmed garden or a mix of wild and arranged garden, a completely wild garden is not as attractive

Garden behaviour

3/3

Most attractive garden types



Base: Total – 4026 IP, Sweden - 501 IP, Denmark – 506 IP, UK – 505 IP, Germany – 504 IP, France – 503 IP, Netherlands – 502 IP, Belgium – 502 IP, Poland – 503 IP

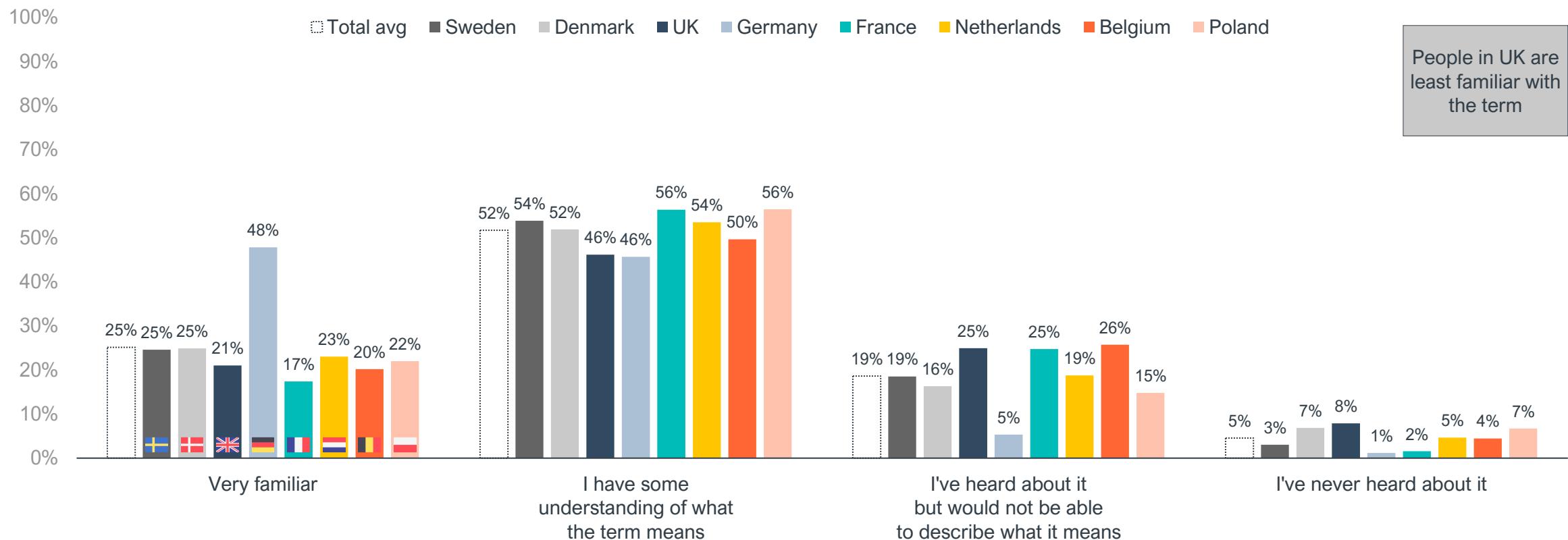
Q: Which of these garden types is most attractive according to you?

In Germany, the concept of biodiversity is much more familiar than in other markets

Biodiversity awareness and perception

1/6

Awareness/familiarity with the term Biodiversity, % of lawn owners

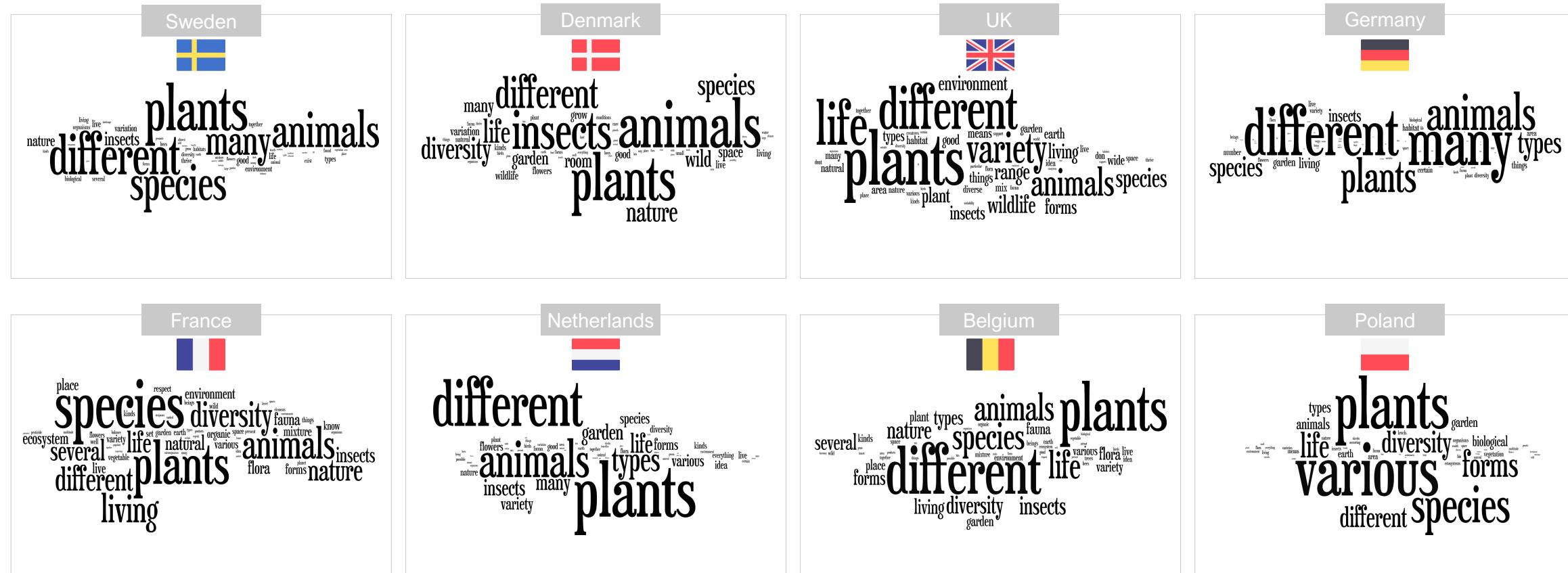


Base: Total – 4026 IP, Sweden - 501 IP, Denmark – 506 IP, UK – 505 IP, Germany – 504 IP, France – 503 IP, Netherlands – 502 IP, Belgium – 502 IP, Poland – 503 IP

Q: How familiar are you with the term biodiversity?

When asked to describe what biodiversity means, most people mentioned *different species of plants and animals*

What does the term biodiversity mean?



Base: Total – 4026 IP, Sweden – 501 IP, Denmark – 506 IP, UK – 505 IP, Germany – 504 IP, France – 503 IP, Belgium – 502 IP, Netherlands – 502 IP, Poland – 503 IP

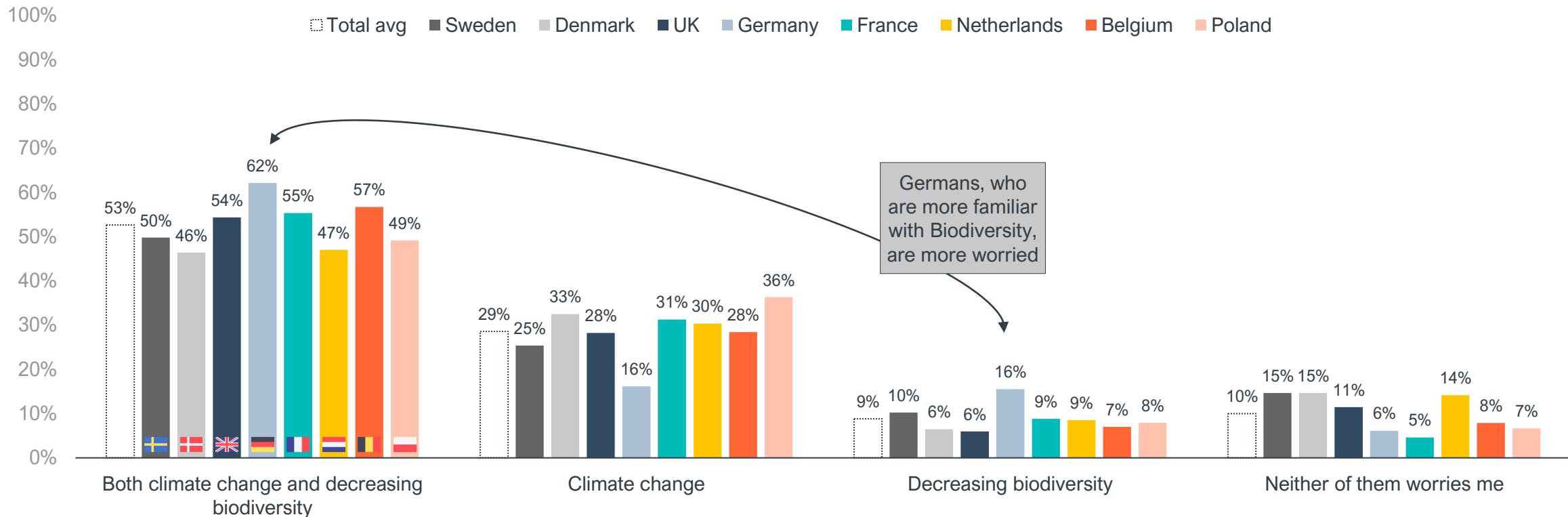
Q: What does the term biodiversity mean?

About half of the countries' populations are concerned about both climate change and decreasing biodiversity

Biodiversity awareness and perception

3/6

Sustainability issues that worries



Base: Total – 4026 IP, Sweden - 501 IP, Denmark – 506 IP, UK – 505 IP, Germany – 504 IP, France – 503 IP, Netherlands – 502 IP, Belgium – 502 IP, Poland – 503 IP

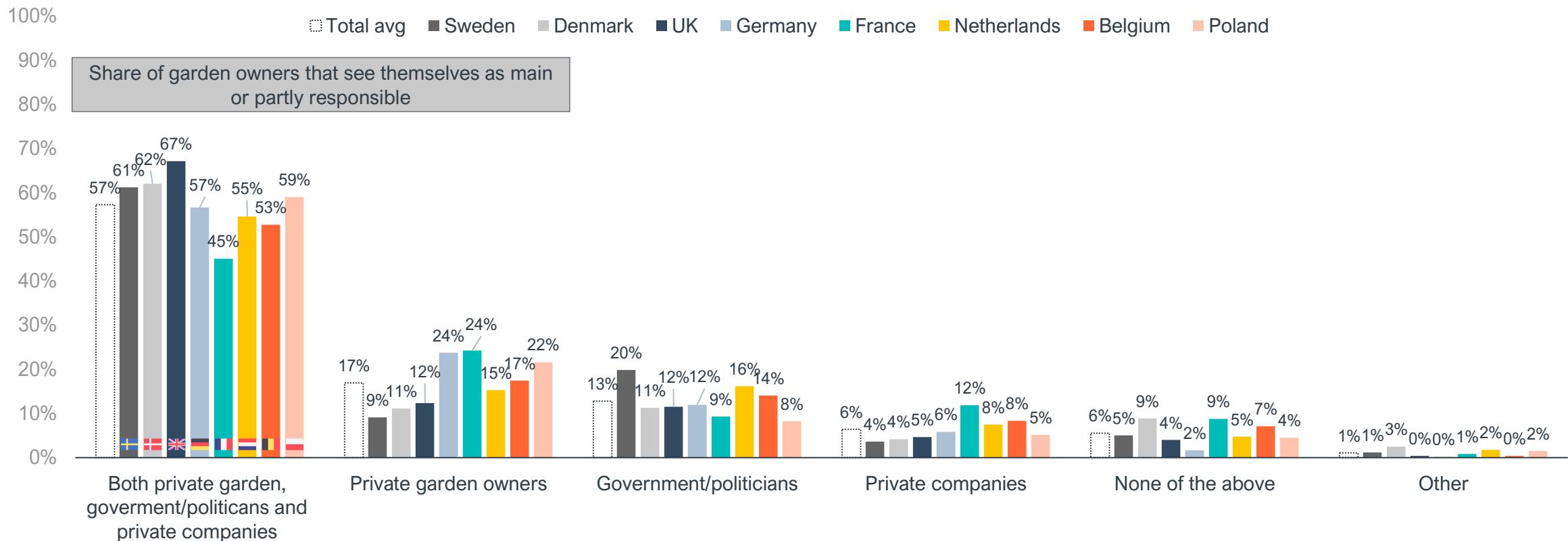
Q: Which of these sustainability issues worries you the most?

Most people think that it's a common responsibility to maintain biodiversity

Biodiversity awareness and perception

4/6

Greatest responsibility in maintaining biodiversity



Base: Total – 4026 IP, Sweden - 501 IP, Denmark – 506 IP, UK – 505 IP, Germany – 504 IP, France – 503 IP, Netherlands – 502 IP, Belgium – 502 IP, Poland – 503 IP

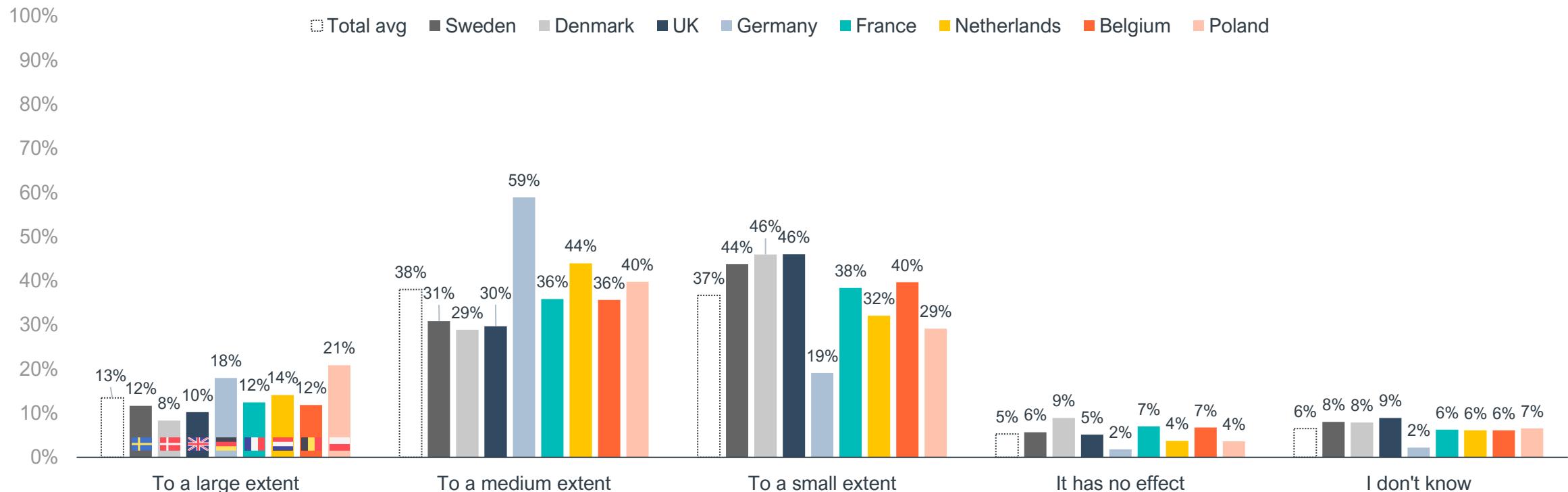
Q: According to you, who carries the greatest responsibility in maintaining biodiversity?

In Germany, private garden owners believe they can help boost biodiversity to a greater extent than in other markets

Biodiversity awareness and perception

5/6

The perception of what extent the own garden can help boost biodiversity



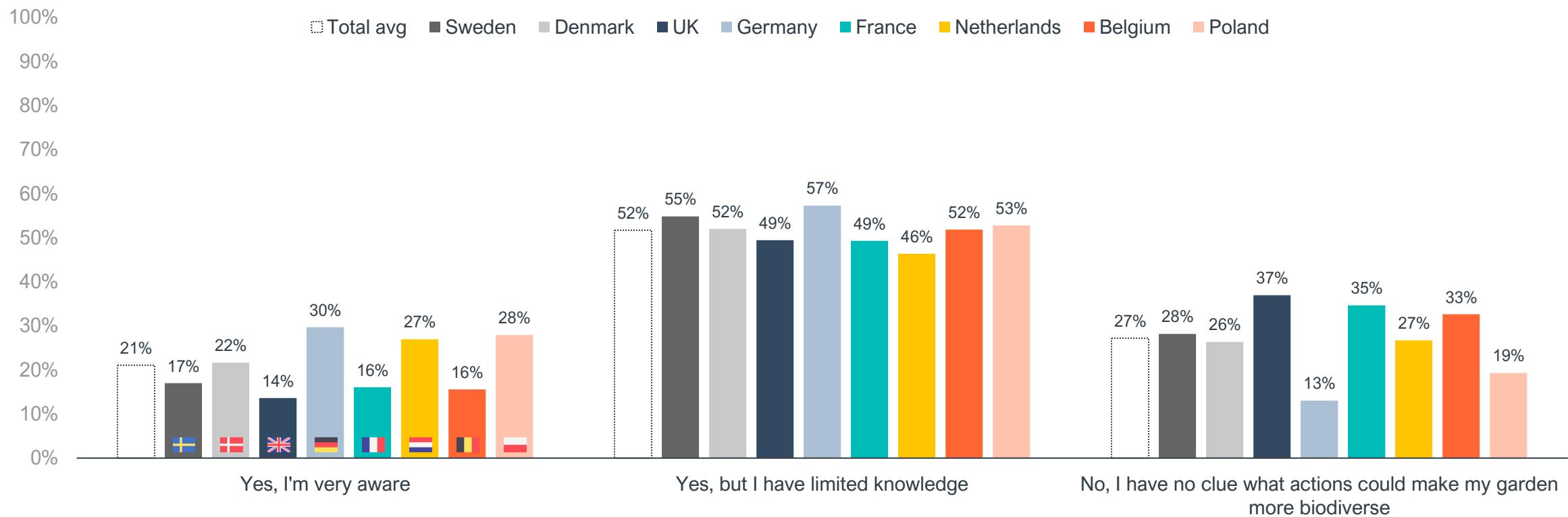
Base: Total – 4026 IP, Sweden - 501 IP, Denmark – 506 IP, UK – 505 IP, Germany – 504 IP, France – 503 IP, Netherlands – 502 IP, Belgium – 502 IP, Poland – 503 IP

Q: To what extent do you think that your own garden can help boost biodiversity?

Lack of knowledge on how to make the gardens more biodiverse is evident in all markets

Biodiversity awareness and perception 6/6

Awareness of actions to make own garden more biodiverse



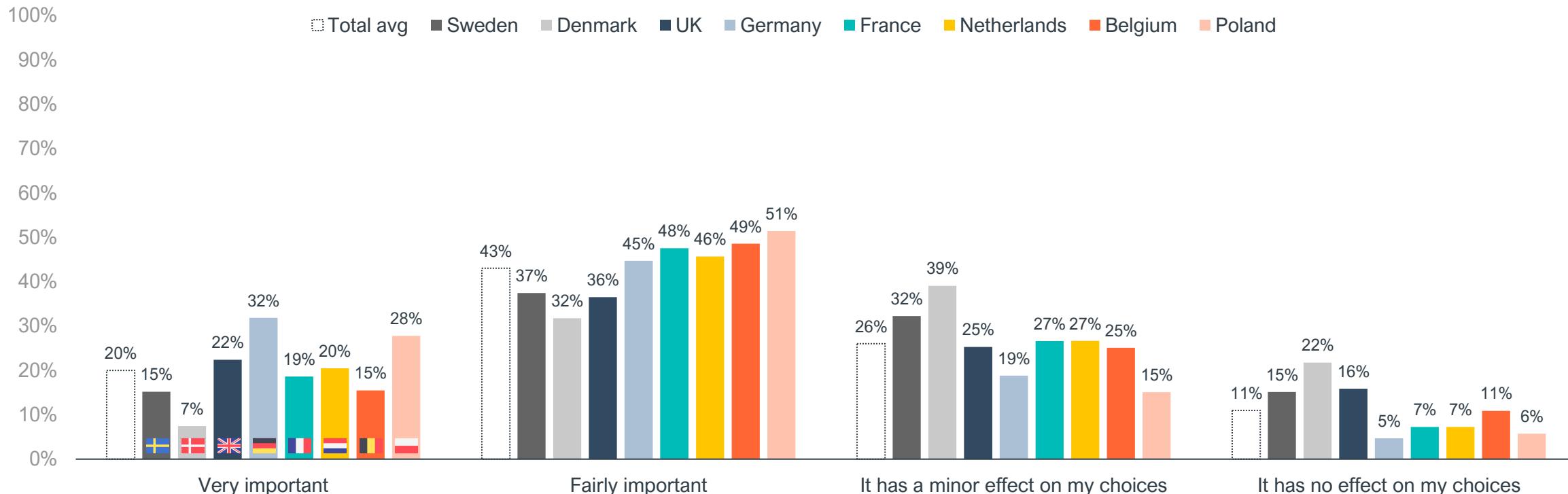
Base: Total – 4026 IP, Sweden - 501 IP, Denmark – 506 IP, UK – 505 IP, Germany – 504 IP, France – 503 IP, Netherlands – 502 IP, Belgium – 502 IP, Poland – 503 IP

Q: Do you know what actions you can take to make your garden more biodiverse?

Germans are the ones that think it's most important to think of biodiversity when planning garden projects, the Danes think it's least important

Biodiversity behavior and maturity 1/6

Importance of biodiversity when planning garden projects



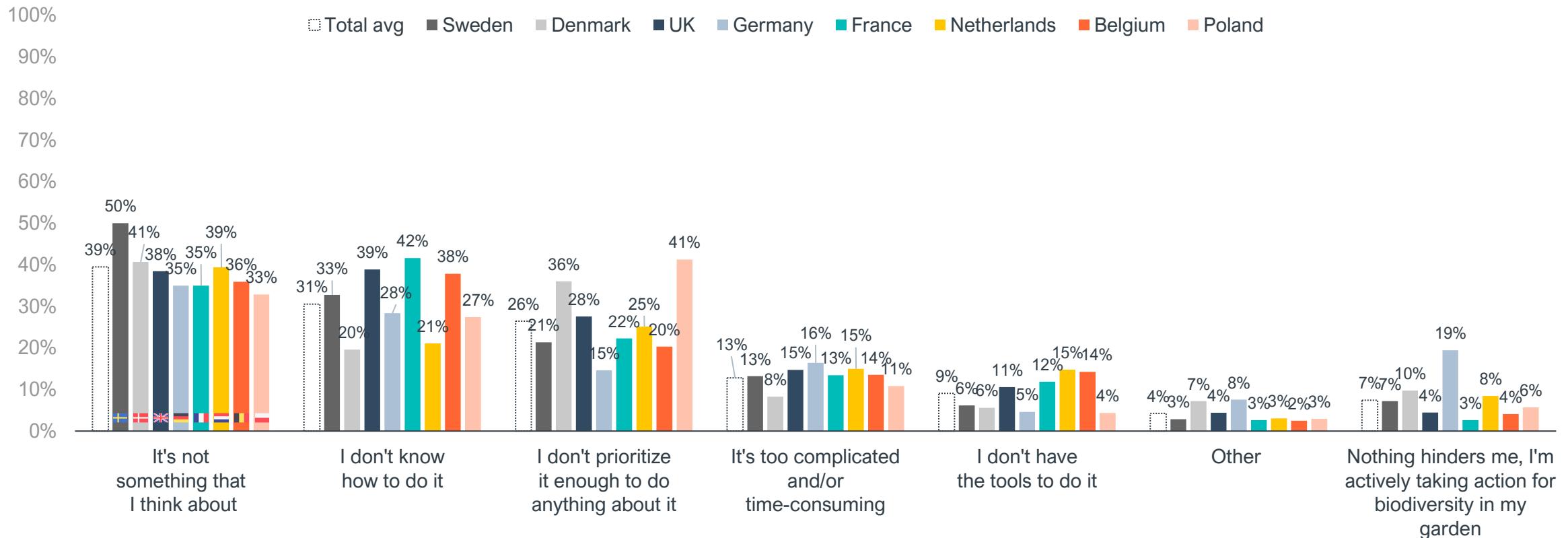
Base: Total – 4026 IP, Sweden - 501 IP, Denmark – 506 IP, UK – 505 IP, Germany – 504 IP, France – 503 IP, Netherlands – 502 IP, Belgium – 502 IP, Poland – 503 IP

Q: When you plan your garden projects, how important is biodiversity?

The main barrier for making gardens more biodiverse differs between markets but is linked to lack of knowledge and awareness of why it is important

Biodiversity behavior and maturity 2/6

Barriers for making the garden more biodiverse



Base: Total – 1496 IP, Sweden - 236 IP, Denmark – 306 IP, UK – 208 IP, Germany – 116 IP, France – 169 IP, Belgium – 180 IP, Netherlands – 172 IP, Poland – 109 IP

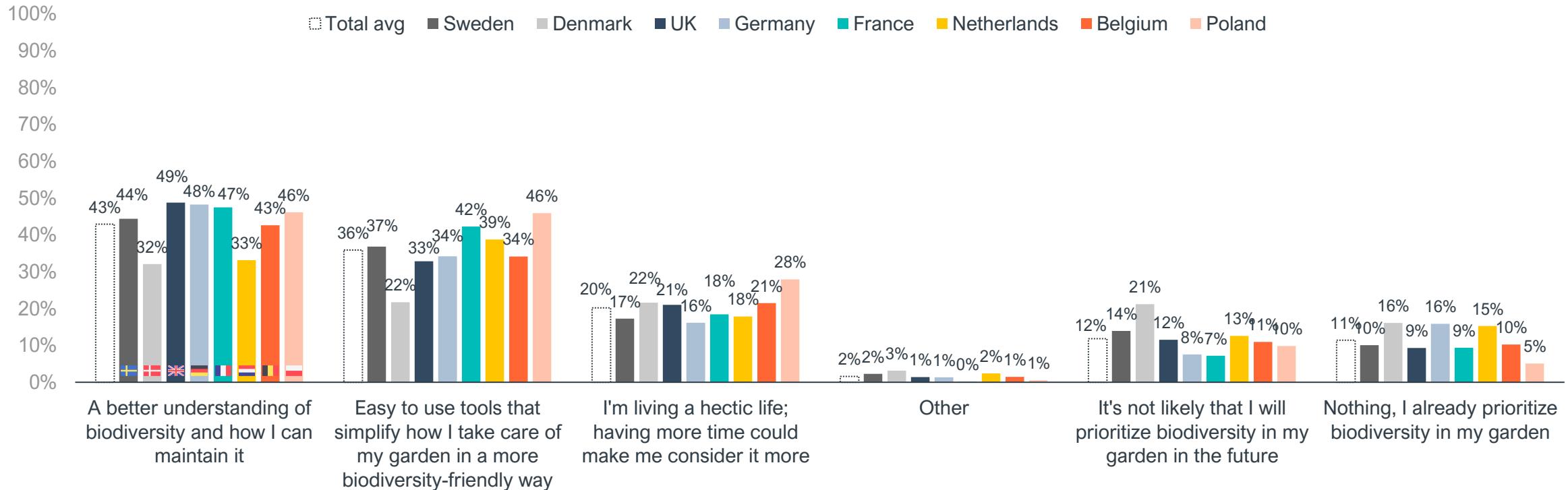
Q: What – if something – hinders you from making your garden more biodiverse?

Better understanding and tools that simplify the work are the main drivers for increasing the biodiversity in the gardens

Biodiversity behavior and maturity

3/6

What would make consumers more likely to increase biodiversity in their garden



Base: Total – 4026 IP, Sweden - 501 IP, Denmark – 506 IP, UK – 505 IP, Germany – 504 IP, France – 503 IP, Netherlands – 502 IP, Belgium – 502 IP, Poland – 503 IP

Q: What would make you more likely to increase biodiversity in your garden?

Most common actions already taken is not using chemical pesticides and planting flowers that attract pollinators. Germans are most active

Biodiversity behavior and maturity 4/6

Which biodiversity actions taken in the own garden

	Total	Sweden	Denmark	UK	Germany	France	Netherlands	Belgium	Poland
I avoid using chemical pesticides or I only use organic fertilizer and soil	61%	60%	59%	51%	70%	66%	56%	61%	60%
I have planted flowers that are especially suitable to attract bees and other pollinators	57%	52%	50%	62%	67%	51%	61%	49%	61%
I try to save rainwater in my garden (rainwater harvesting)	52%	48%	43%	45%	60%	57%	47%	61%	56%
I use compost and/or recycle material from my garden like leaves, grass, and sticks to improve the soil.	52%	58%	45%	48%	56%	56%	42%	54%	59%
I have planted trees and shrubs that provides shelter for birds and other animals	51%	44%	51%	46%	62%	52%	55%	43%	53%
I grow vegetables and plants that I can eat	48%	62%	41%	42%	50%	52%	32%	42%	61%
I have installed a birdhouse	43%	39%	39%	38%	52%	44%	51%	38%	43%
I choose native plants in my garden	30%	27%	15%	31%	56%	15%	21%	25%	41%
I have installed water sources to attract animals like birds and frogs	30%	29%	26%	31%	47%	24%	26%	25%	27%
I avoid mowing all of my lawn and allow parts of it to grow	28%	35%	20%	29%	37%	27%	17%	32%	27%
I avoid removing all weeds	28%	30%	37%	30%	40%	33%	15%	28%	9%
I have chosen to let my entire garden grow wild	8%	6%	9%	8%	12%	9%	7%	9%	6%
I have not done any of the above	2%	2%	5%	3%	0%	1%	3%	1%	1%
Other	1%	2%	2%	1%	2%	1%	2%	1%	0%

Base: Total – 2922 IP, Sweden - 359 IP, Denmark – 373 IP, UK – 317 IP, Germany – 438 IP, France – 329 IP, Netherlands – 363 IP, Belgium – 338 IP, Poland – 405 IP

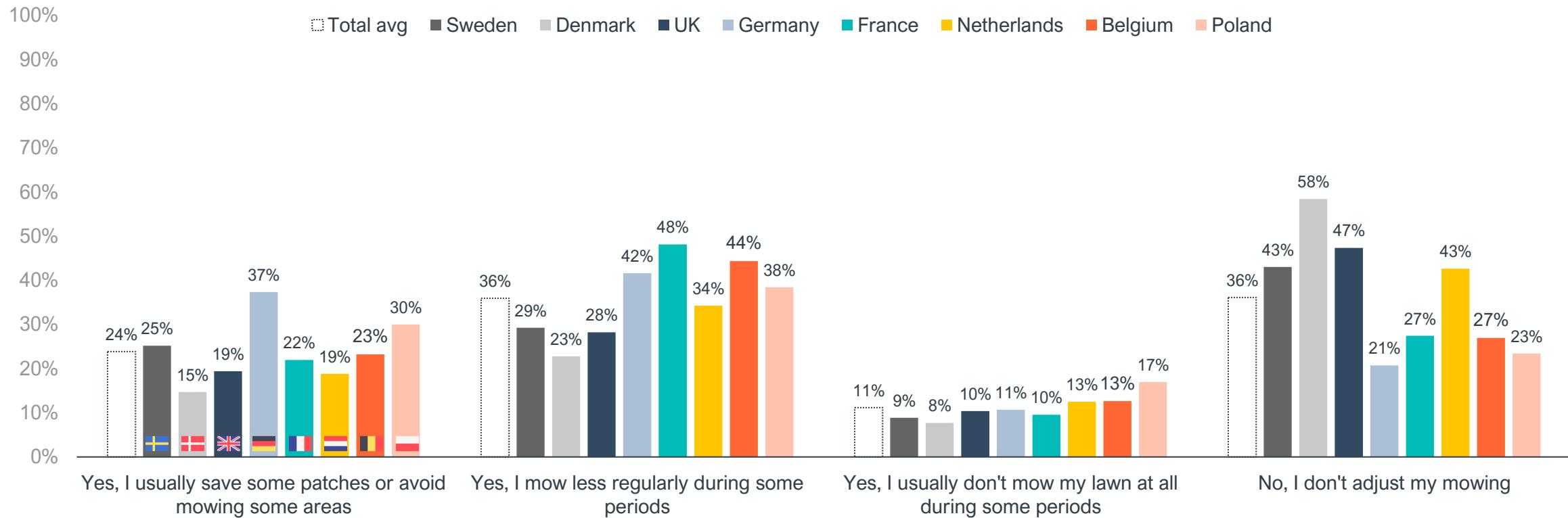
Q: Which of these actions have you taken to increase biodiversity in your garden?

When moving the lawn, Germans usually save some patches or avoid mowing some areas while the majority of the Danes don't adjust at all

Biodiversity behaviour and maturity

5/6

Share who considers biodiversity when moving their lawn



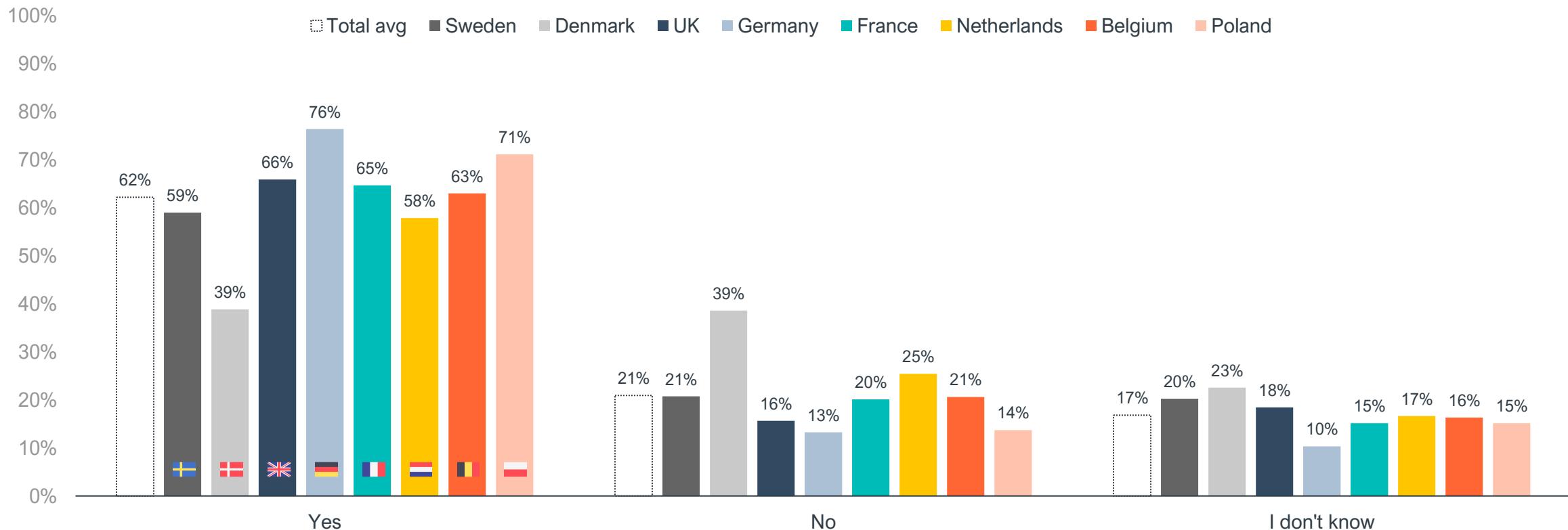
Base: Total – 4026 IP, Sweden - 501 IP, Denmark – 506 IP, UK – 505 IP, Germany – 504 IP, France – 503 IP, Netherlands – 502 IP, Belgium – 502 IP, Poland – 503 IP

Q: Do you consider biodiversity when mowing your lawn?

There is a great interest in learning more about biodiversity across all markets, particularly in Germany and Poland but less so in Denmark

Biodiversity behavior and maturity 6/6

Would you like to learn more about ways to let biodiversity thrive in your garden?



Base: Total – 4026 IP, Sweden - 501 IP, Denmark – 506 IP, UK – 505 IP, Germany – 504 IP, France – 503 IP, Netherlands – 502 IP, Belgium – 502 IP, Poland – 503 IP

Q: Would you like to learn more about ways to let biodiversity thrive in your garden?

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45% of the Swedish population state that they own a garden with a lawn

Overview potential market 1/1



Share of population owning a garden with a lawn



Base: 1111 IP

Q: Which of the following statements are correct when describing your home? (I own a garden with a lawn)

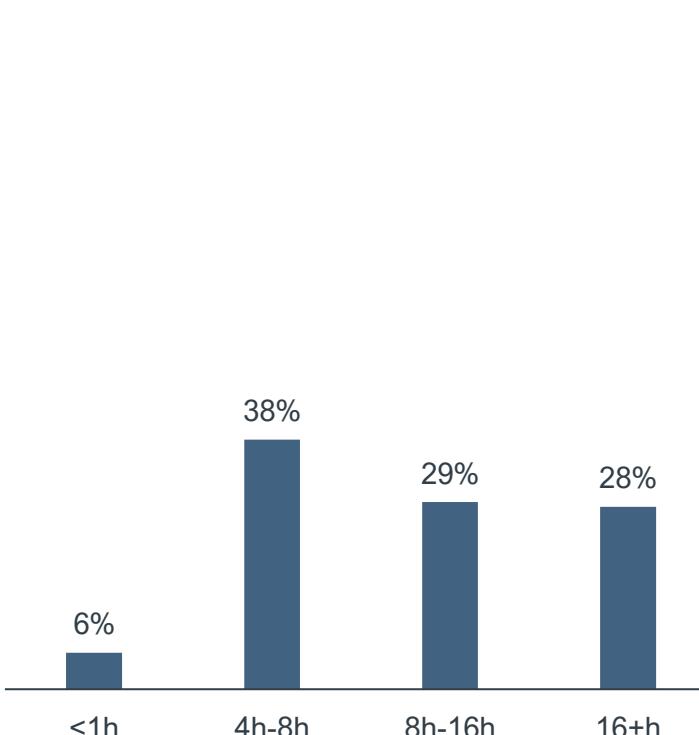
For Swedes, the garden should be a relaxing space that should be somewhat well arranged, about 4-8h is generally spent on gardening

Garden behaviour

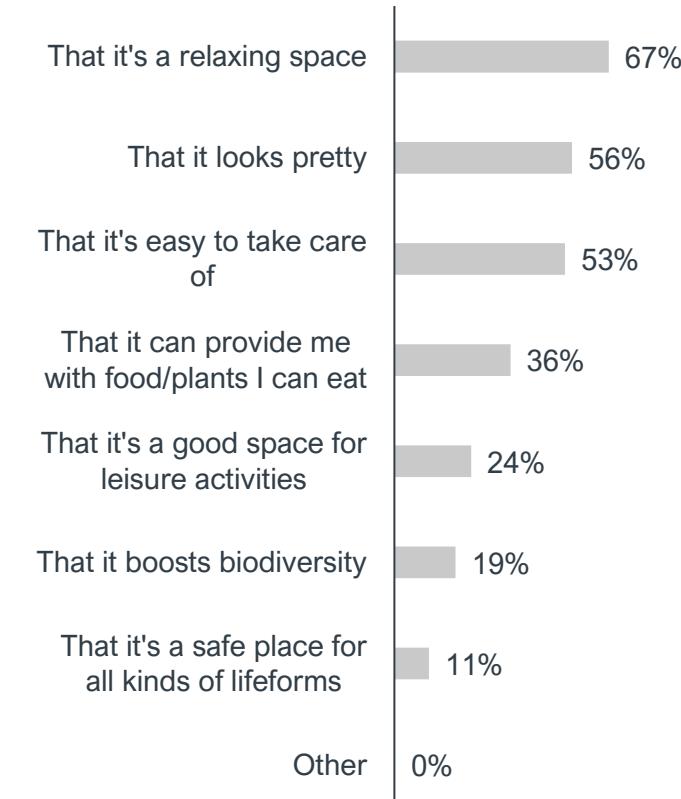
1/1



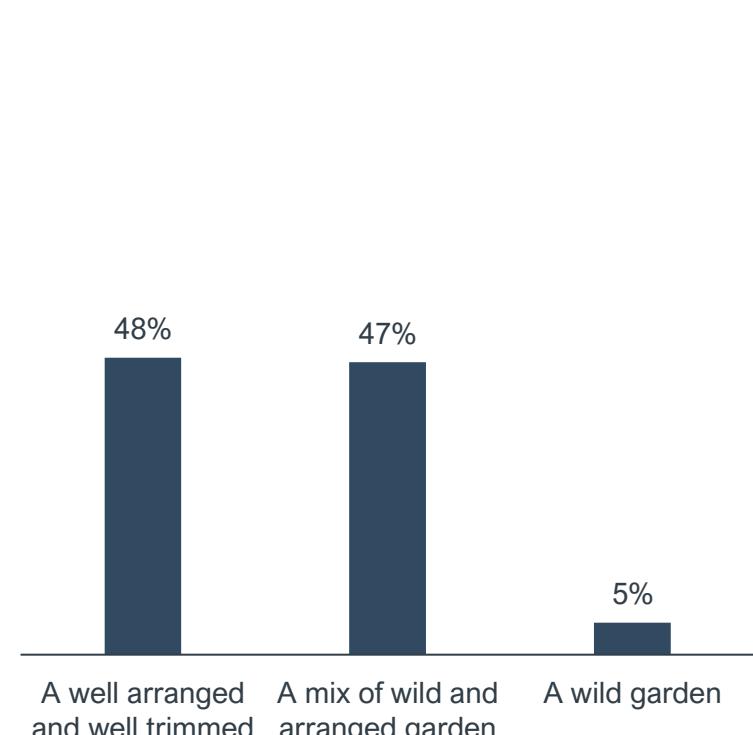
Time spend gardening during season



Top priorities when designing garden



Most attractive garden types



Base: 501 IP

Q: How much time do you spend gardening during the gardening season (i.e. spring/summer/autumn)?, What are your top priorities when designing your garden? (possible to choose max 3 options), Which of these garden types is most attractive according to you?

Nepa

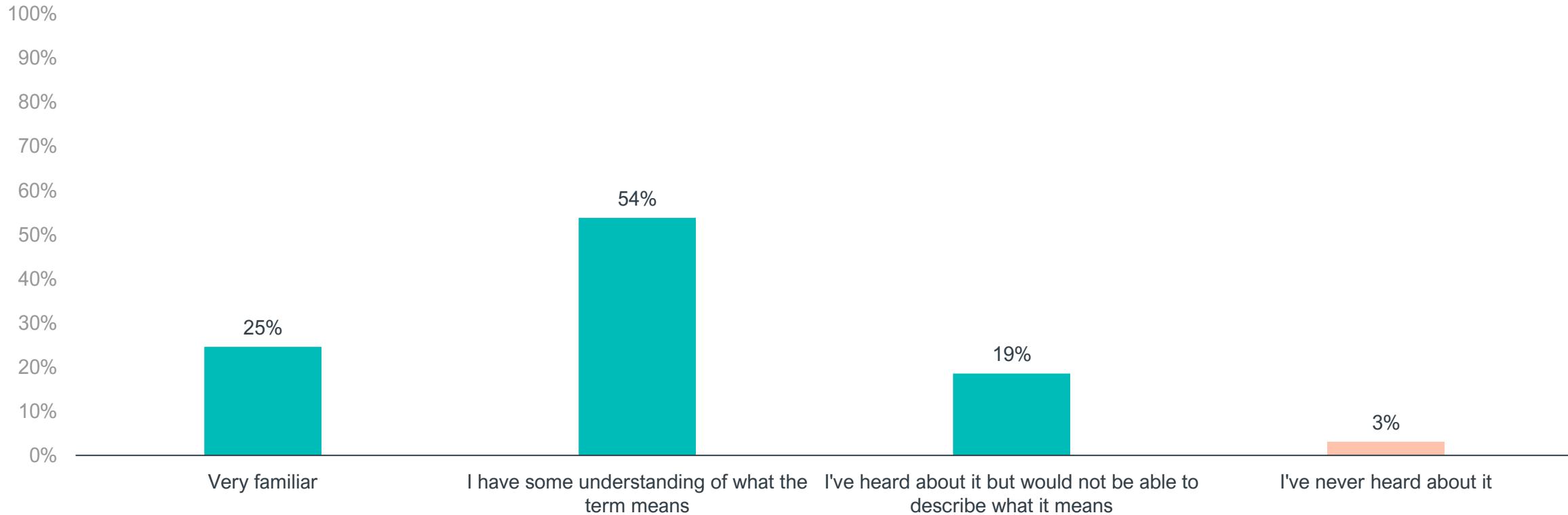
One out of four is very familiar with the term *biodiversity* while the majority only has some understanding of what the term means

Biodiversity awareness and perception

1/5



Awareness/familiarity with the term Biodiversity, % of lawn owners



Base: 501 IP

Q: How familiar are you with the term biodiversity?

“Different species of plants and animals” are most often mentioned when respondents are asked to describe the term in their own words



What does the term biodiversity mean?

plants together
many animals
different species

Base: 501 IP

Q: What does the term biodiversity mean?

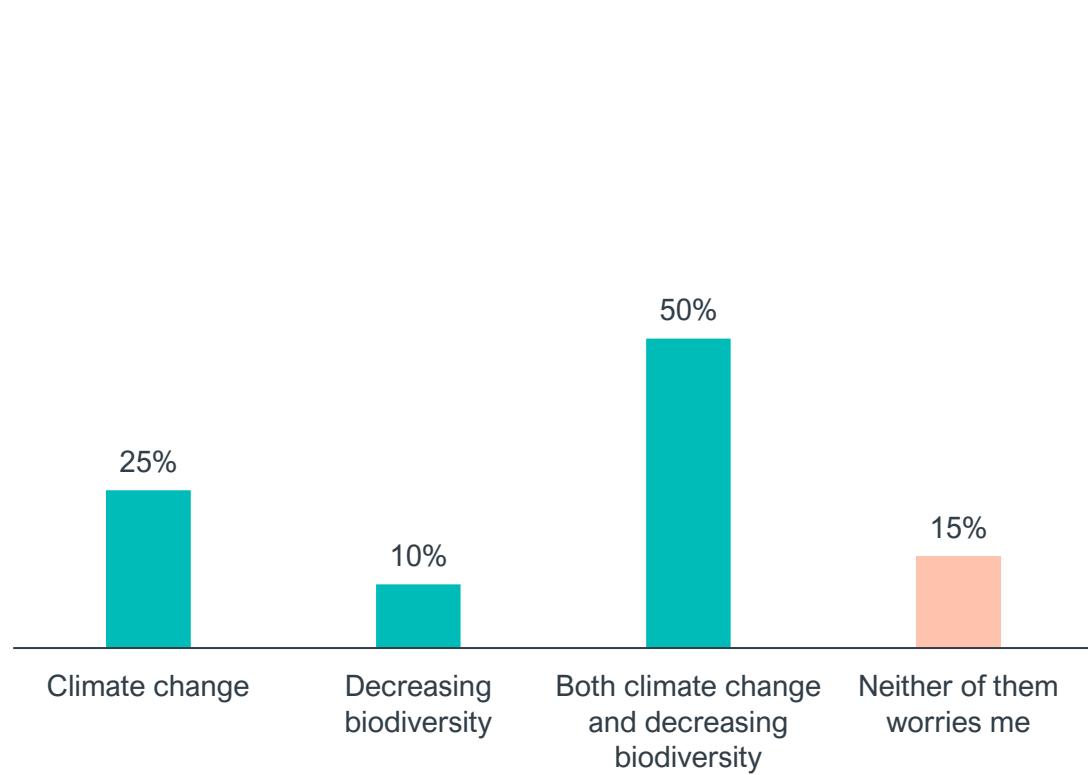
28

Half of the study population think that climate change and decreasing biodiversity worries as much, joint responsibility is also stated

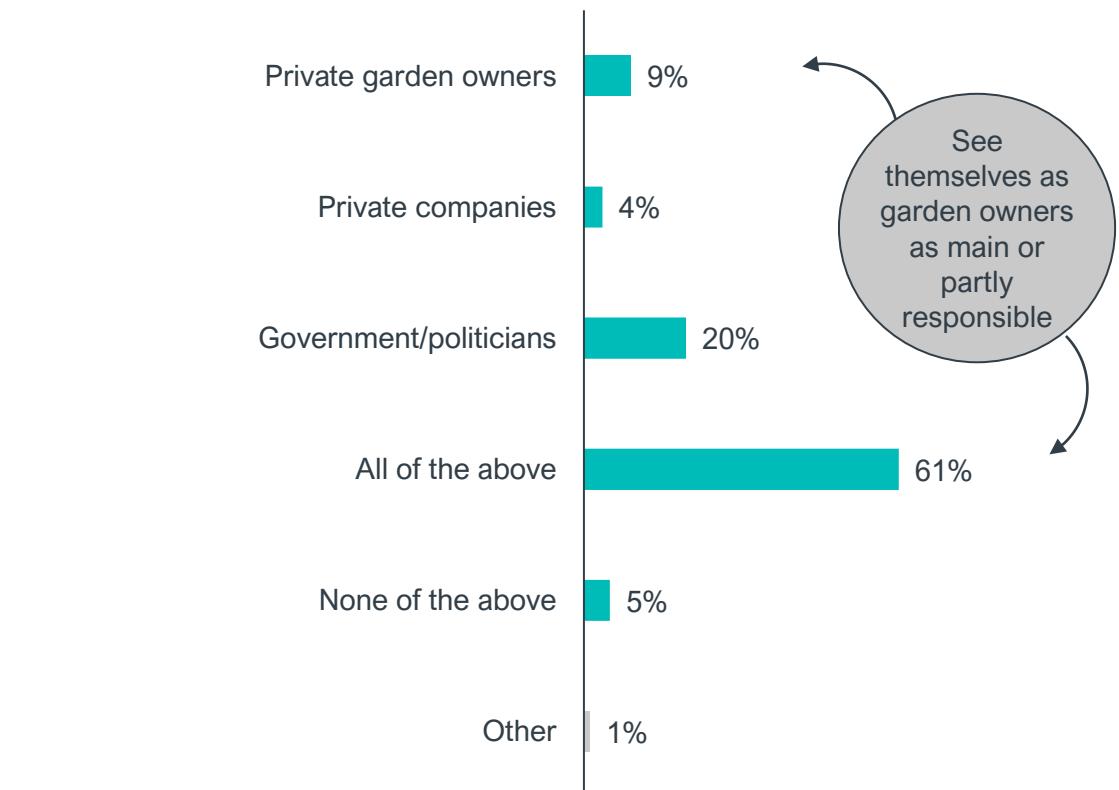
Biodiversity awareness and perception 3/5



Sustainability issues that worries



Greatest responsibility in maintaining biodiversity



Base: 501 IP

Q: Which of these sustainability issues worries you the most?, According to you, who carries the greatest responsibility in maintaining biodiversity?

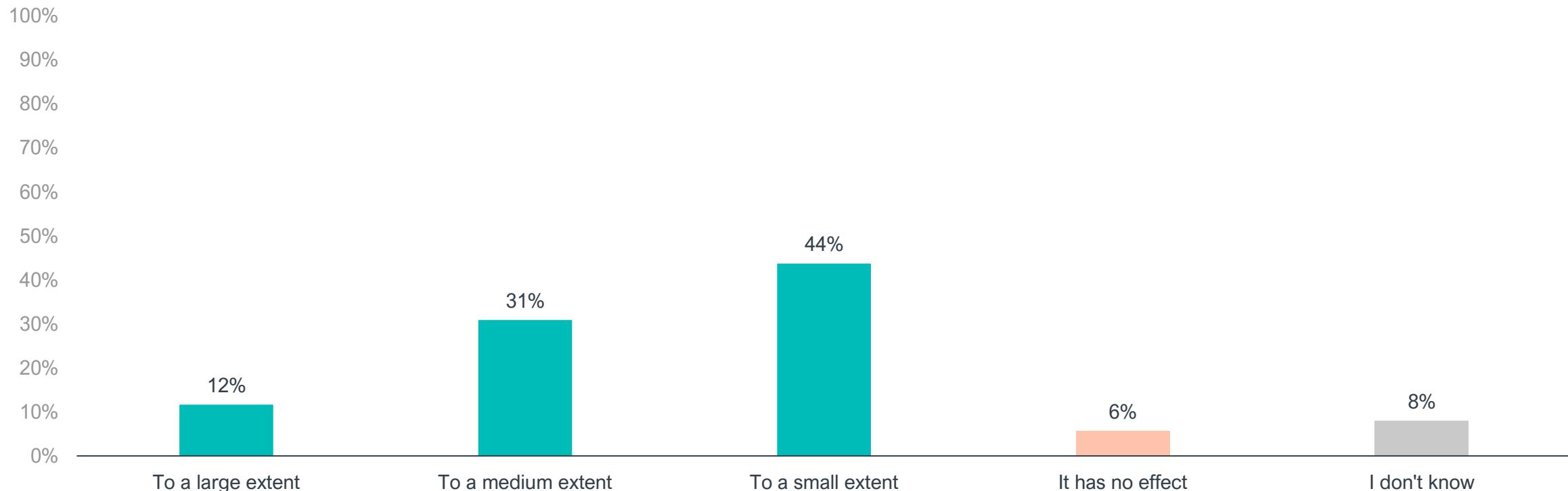
44% believe that their own garden only contributes to a small extent to increasing biodiversity

Biodiversity awareness and perception

4/5



The perception of what extent the own garden can help boost biodiversity



Base: 501 IP

Q: To what extent do you think that your own garden can help boost biodiversity?

30

Nepa

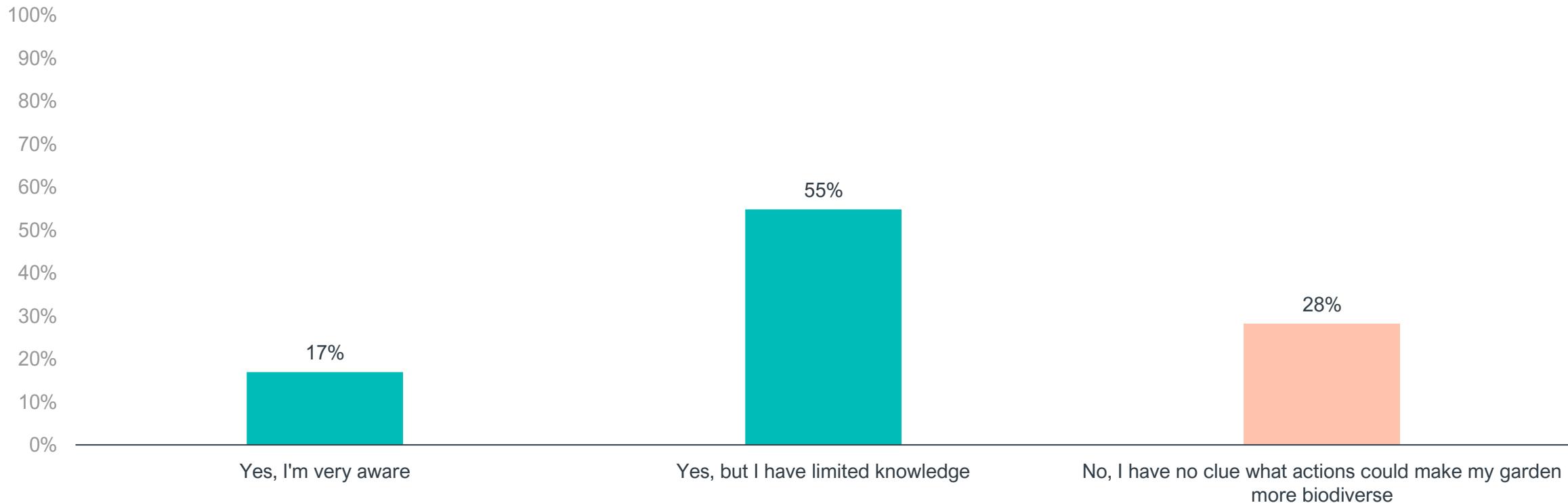
More than half of the population state that they know what actions to take but have limited knowledge, one third have no clue

Biodiversity awareness and perception

5/5



Awareness of actions to make own garden more biodiverse



Base: 501 IP

Q: Do you know what actions you can take to make your garden more biodiverse?

31

Nepa

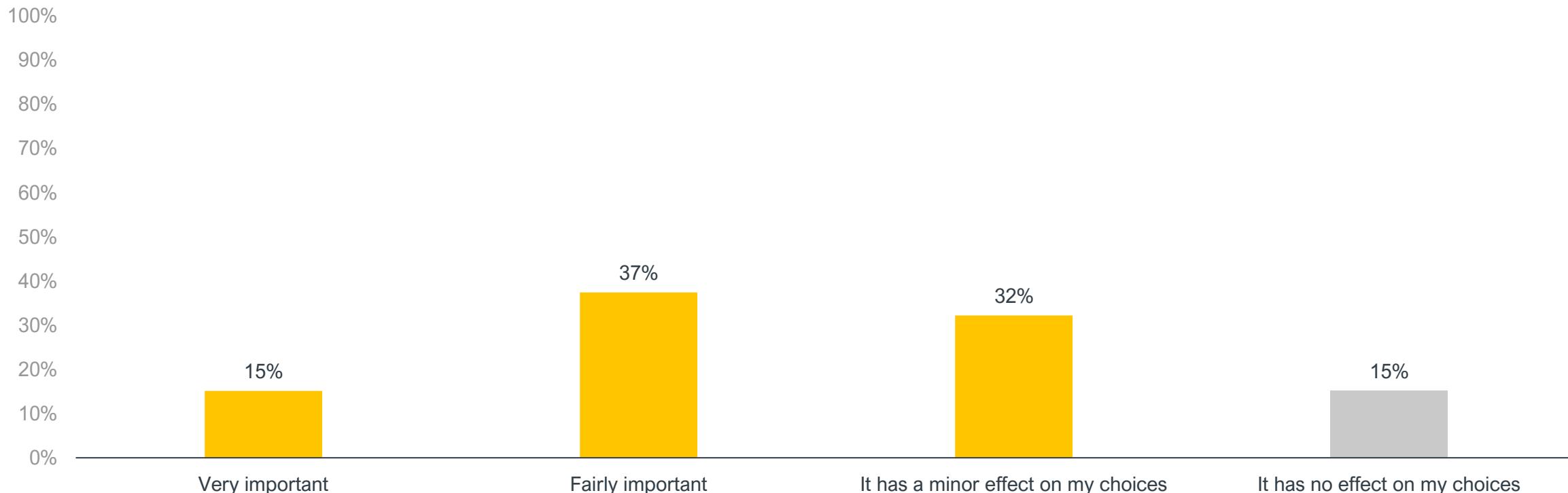
15% consider biodiversity to be very important when they are planning garden projects, equally many says it has no influence on their choices

Biodiversity behaviour and maturity

1/5



Importance of biodiversity when planning garden projects



Base: 501 IP

Q: When you plan your garden projects, how important is biodiversity?

32

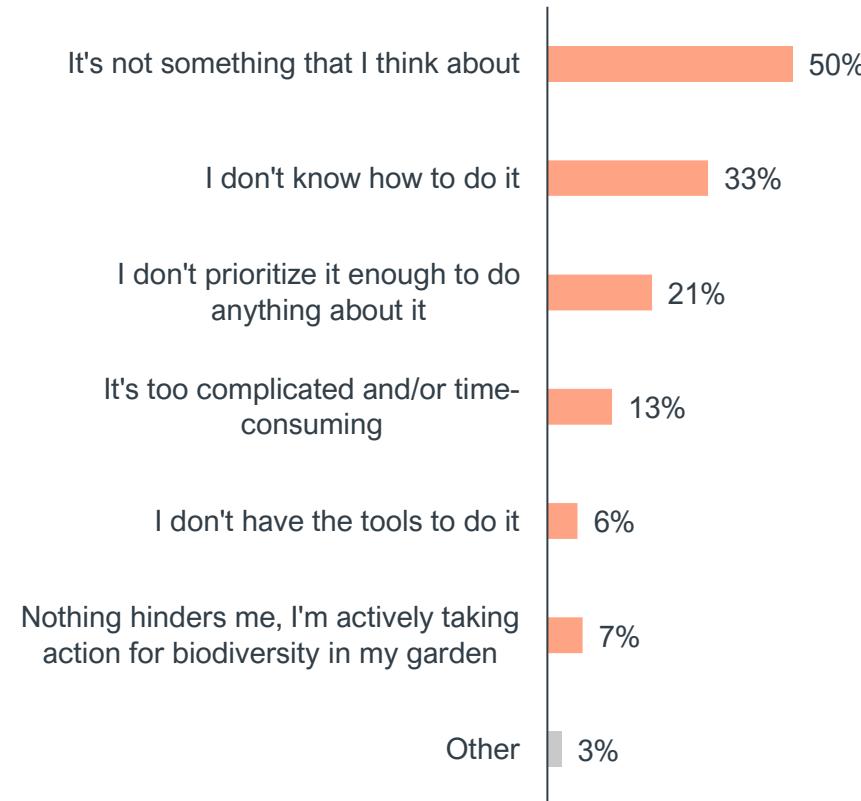
Nepa

The main barrier is that people just don't think about biodiversity when gardening, more knowledge would make people increase biodiversity

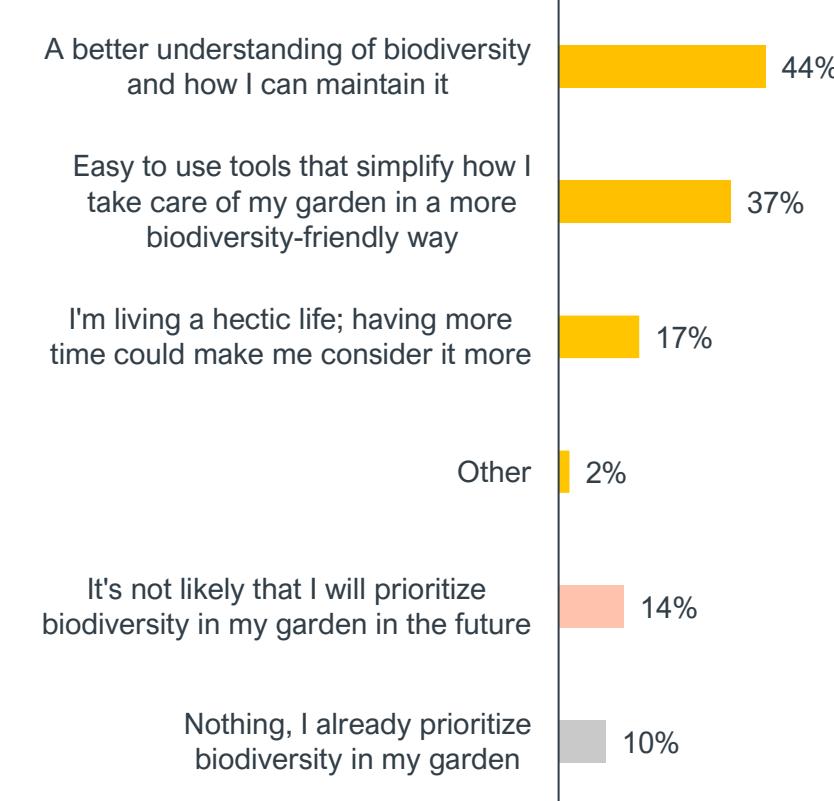
Biodiversity behaviour and maturity 2/5



Barriers for making the garden more biodiverse



What would make consumers more likely to increase biodiversity in their garden



Base: Barriers – 236 IP, More likely to increase – 501 IP

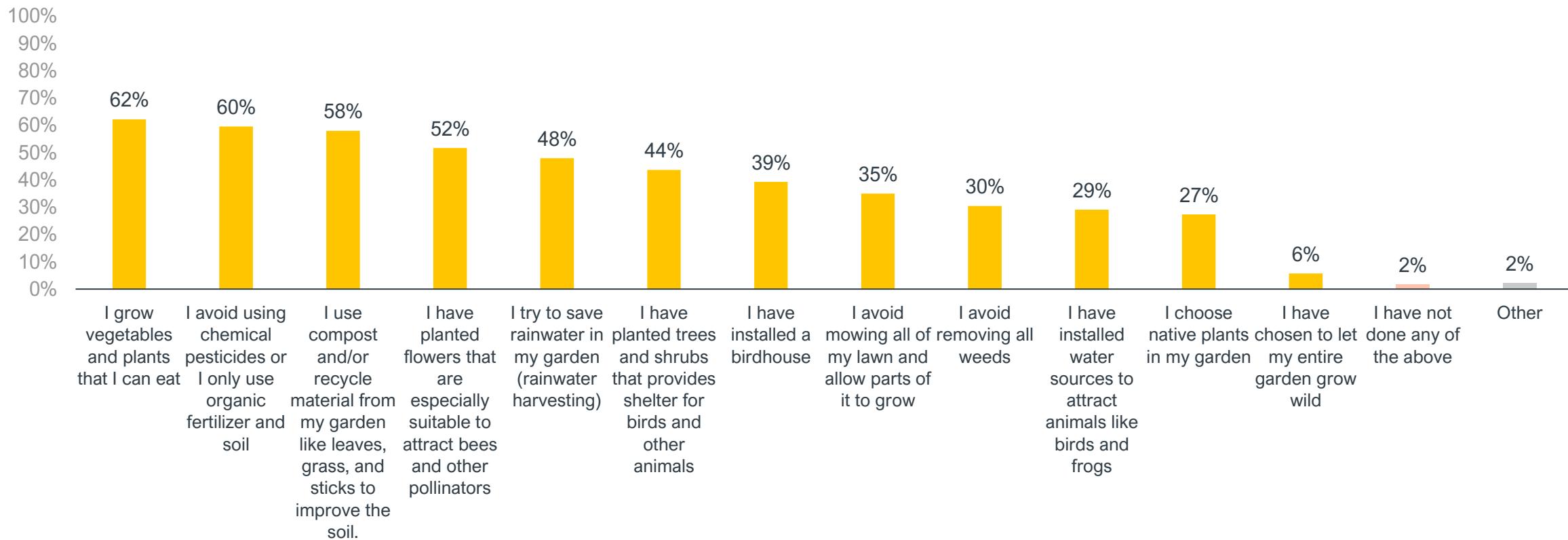
Q: What – if something – hinders you from making your garden more biodiverse? What would make you more likely to increase biodiversity in your garden?

In Sweden, growing edible vegetables and plants is the most common action to increase biodiversity followed by avoiding chemical pesticides

Biodiversity behaviour and maturity 3/5



Which biodiversity actions taken in the own garden



Base: 359 IP

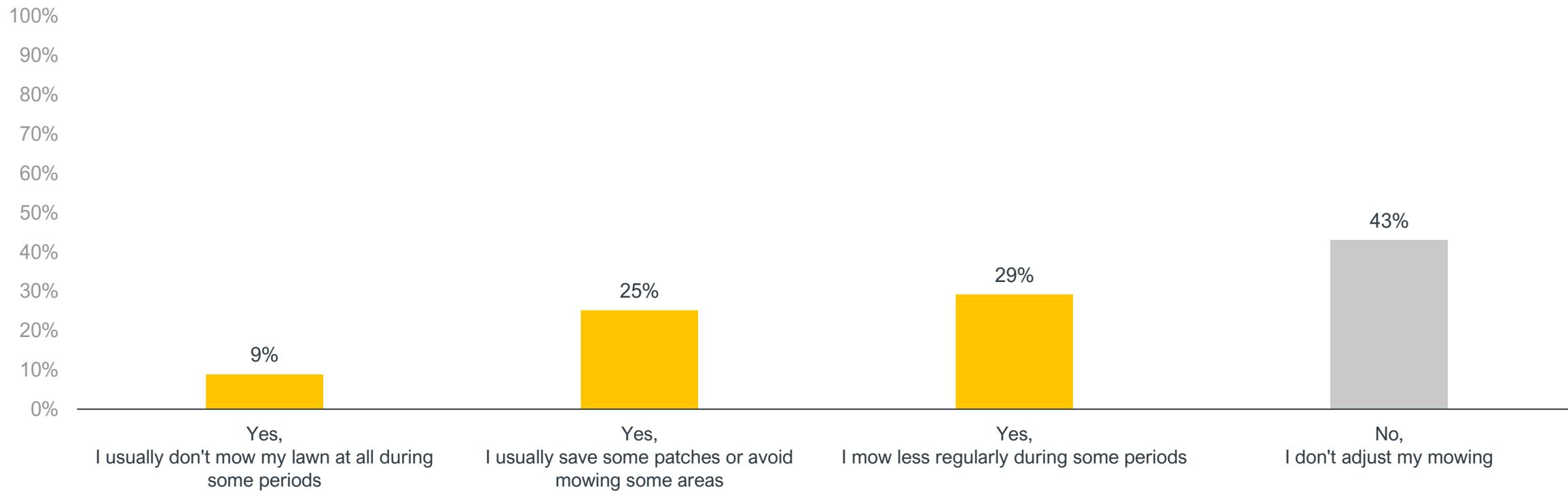
Q: Which of these actions have you taken to increase biodiversity in your garden?

Two out of five do not adjust the mowing for biodiversity, the other part mainly mow less regularly or avoid mowing some areas

Biodiversity behaviour and maturity 4/5



Share who considers biodiversity when moving their lawn



Base: 501 IP

Q: Do you consider biodiversity when mowing your lawn?

35

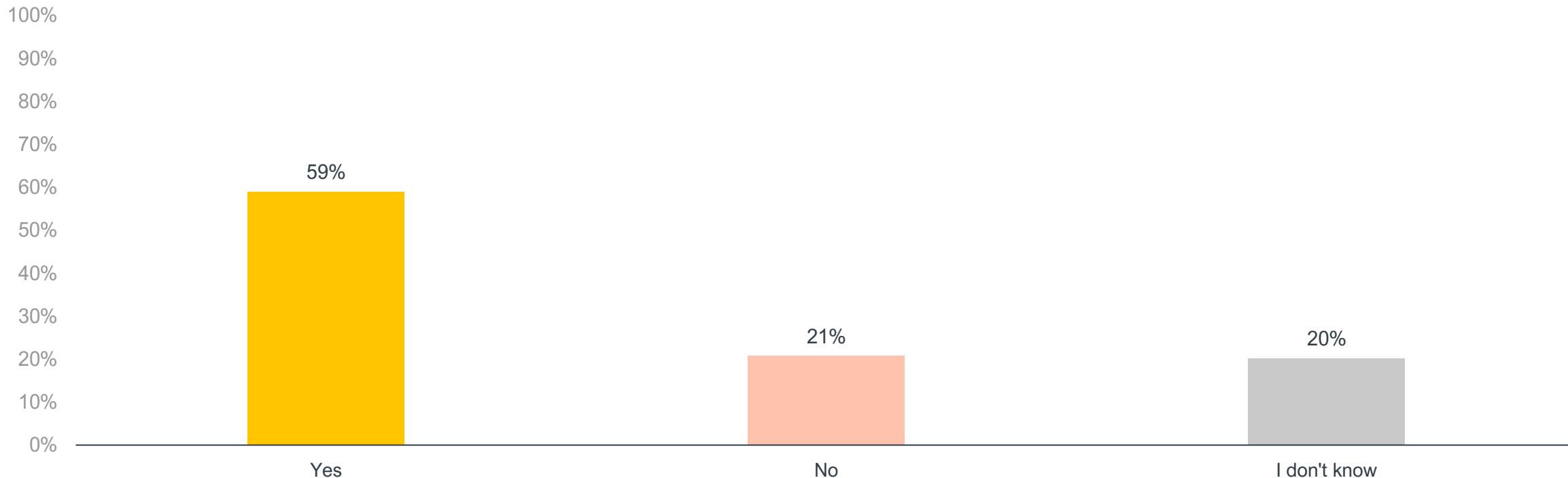
Nepa

The majority (~60%) are interested in learning more about how to let the biodiversity thrive in the garden

Biodiversity behaviour and maturity 5/5



Would you like to learn more about ways to let biodiversity thrive in your garden?



Base: 501 IP

Q: Would you like to learn more about ways to let biodiversity thrive in your garden?

36

Nepa

Summary: Sweden



Overview potential market	<ul style="list-style-type: none">• 45% of the Swedish population state that they own a garden with a lawn
Garden behaviour	<ul style="list-style-type: none">• For Swedes, the garden should be a relaxing space that should be somewhat well-arranged, about 4-8h is generally spent on gardening
Biodiversity awareness and perception	<ul style="list-style-type: none">• One out of four is very familiar with the term biodiversity while the majority only has some understanding of what the term means• “Different species of plants and animals” are most often mentioned when the garden owners are asked to describe the term in their own words• Half of the garden owners think that climate change and decreasing biodiversity worries as much, joint responsibility between government/politicians, private companies and private garden owners is also stated• 44% believe that their own garden only contributes to a small extent to increasing biodiversity• More than half of the population state that they know what actions to take but have limited knowledge, one third have no clue
Biodiversity behaviour and maturity	<ul style="list-style-type: none">• 15% consider biodiversity to be very important when they are planning garden projects, equally many says it has no influence on their choices• The main barrier for making the own garden more biodiverse, is that people just don't think about biodiversity when gardening. More knowledge would make people more likely to increase biodiversity• In Sweden, growing edible vegetables and plants is the most common action to increase biodiversity followed by avoiding chemical pesticides• Two out of five do not adjust the mowing for biodiversity, the other part mainly mow less regularly or avoid mowing some areas• The majority (~60%) are interested in learning more about how to let the biodiversity thrive in the garden

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58% of the Danish population state that they own a garden with a lawn

Overview potential market 1/1



Share of population owning a garden with a lawn



Base: 838 IP

Q: Which of the following statements are correct when describing your home? (I own a garden with a lawn)

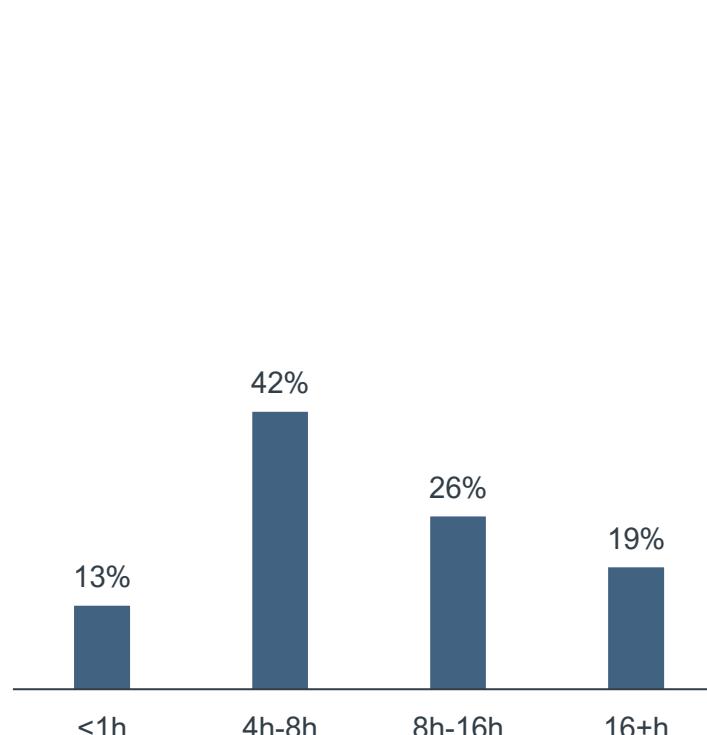
55% spend 8 hours or less per month on gardening. Top priority is that the garden should be easy to take care of and ~50% want a mix of a wild and arranged garden

Garden behaviour

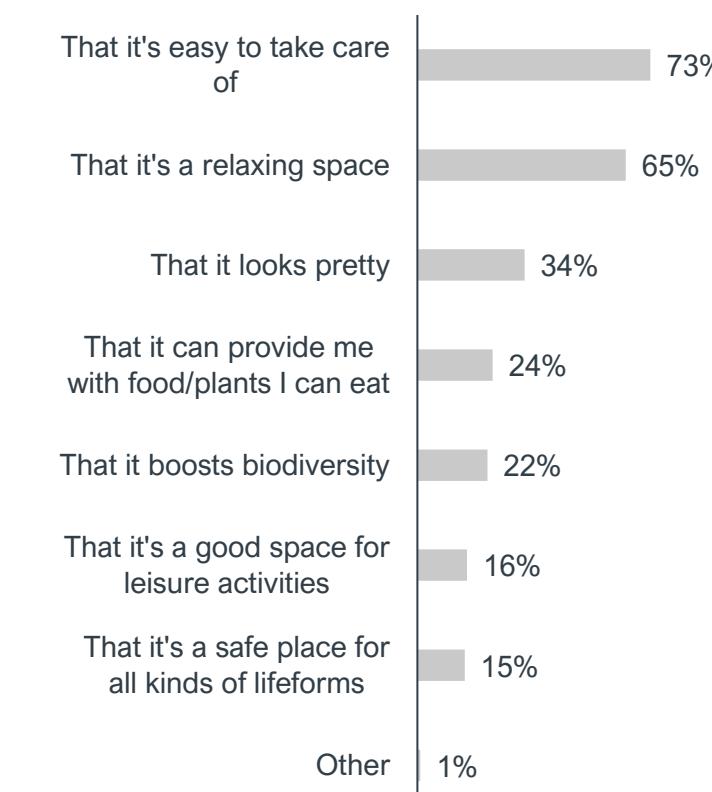
1/1



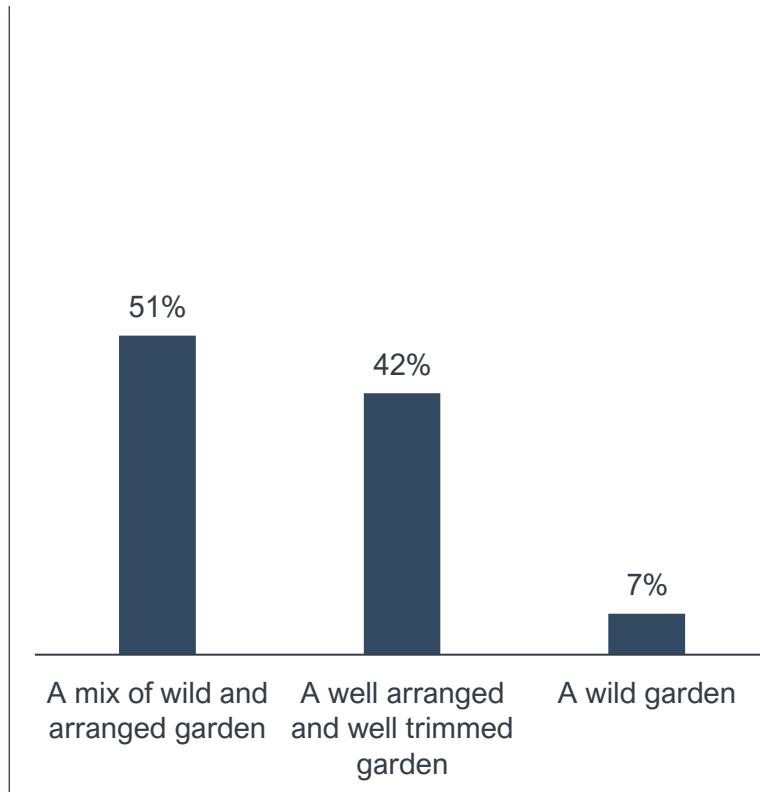
Time spend gardening during season



Top priorities when designing garden



Most attractive garden types



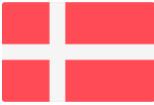
Base: 506 IP

Q: How much time do you spend gardening during the gardening season (i.e. spring/summer/autumn)?, What are your top priorities when designing your garden? (possible to choose max 3 options), Which of these garden types is most attractive according to you?

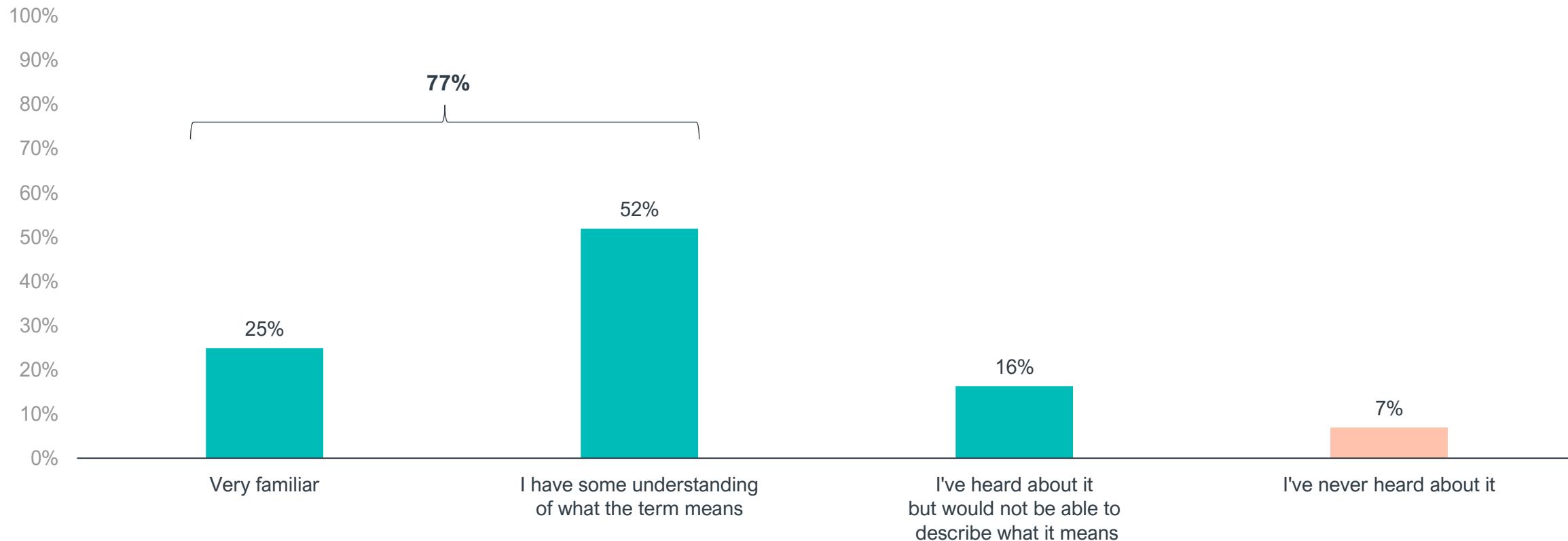
Nepa

~77% are familiar or have some understanding of what biodiversity means (similar understanding compared to the other markets)

Biodiversity awareness and perception 1/5



Awareness/familiarity with the term Biodiversity, % of lawn owners



Base: 506 IP

Q: How familiar are you with the term biodiversity?

“Different species of animals, insects and plants” are most often mentioned when the garden owners describe biodiversity with their own words



What does the term biodiversity mean?

species
many different insects animals plants nature

diversity variation life kinds birds globe flowers

things natural organisms

fauna thrive

land

care growth

great several

wide green small weeds

water large climate

area possibility

well everything room bees grass good lots way place flora trees

garden earth food forms benefit

wildlife

Base: 506 IP

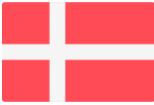
Q: What does the term biodiversity mean?

42

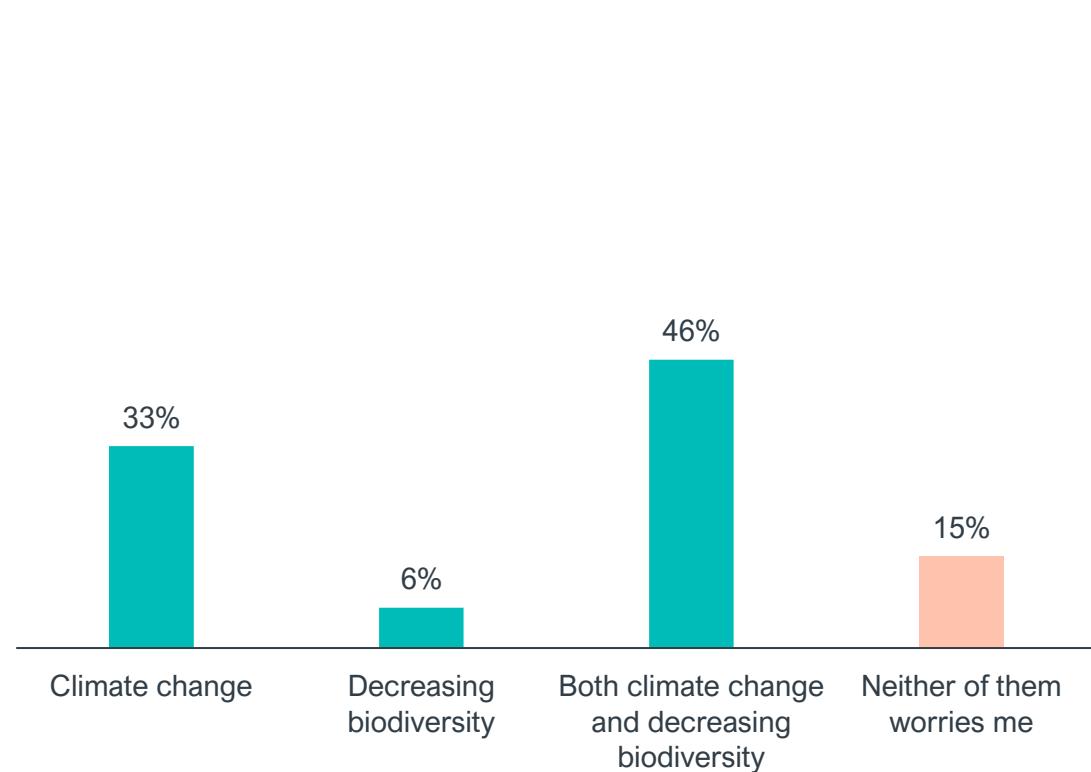
Compared to other markets, the Danes are less worried about decreasing biodiversity

Biodiversity awareness and perception

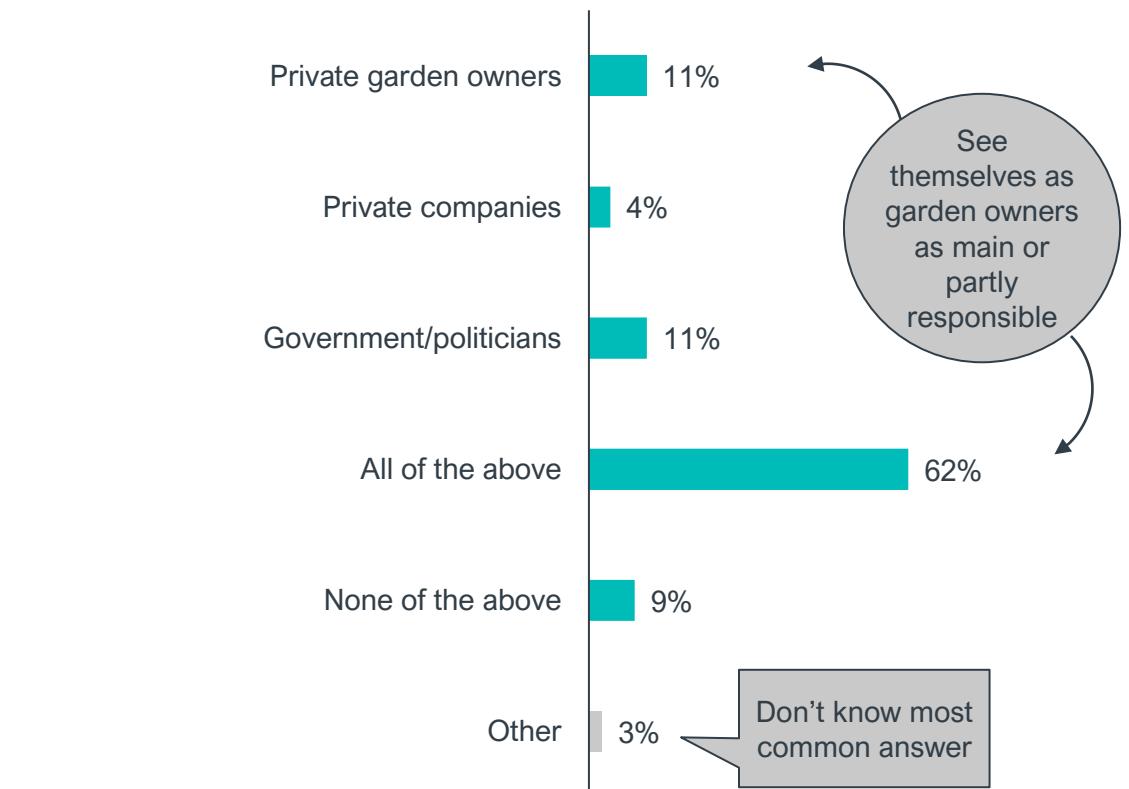
3/5



Sustainability issues that worries



Greatest responsibility in maintaining biodiversity



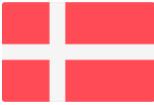
Base: 506 IP

Q: Which of these sustainability issues worries you the most?, According to you, who carries the greatest responsibility in maintaining biodiversity?

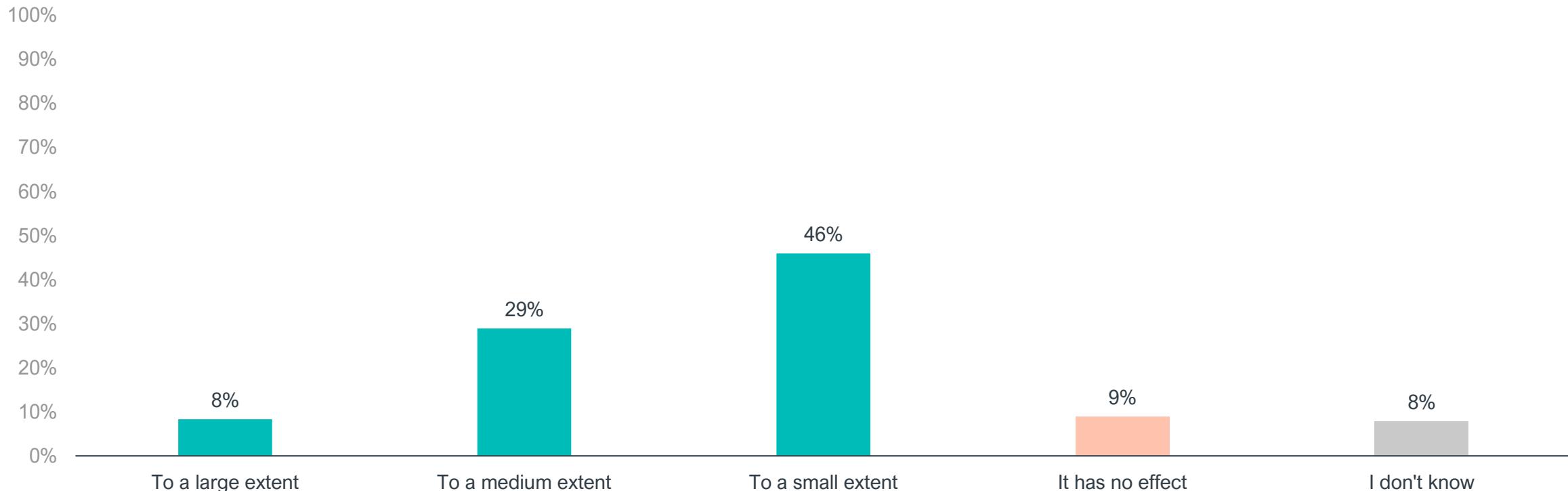
Danish people are somewhat more sceptic to that their own garden can boost the biodiversity compared to others (9% believes it has no effect)

Biodiversity awareness and perception

4/5



The perception of what extent the own garden can help boost biodiversity



Base: 506 IP

Q: To what extent do you think that your own garden can help boost biodiversity?

44

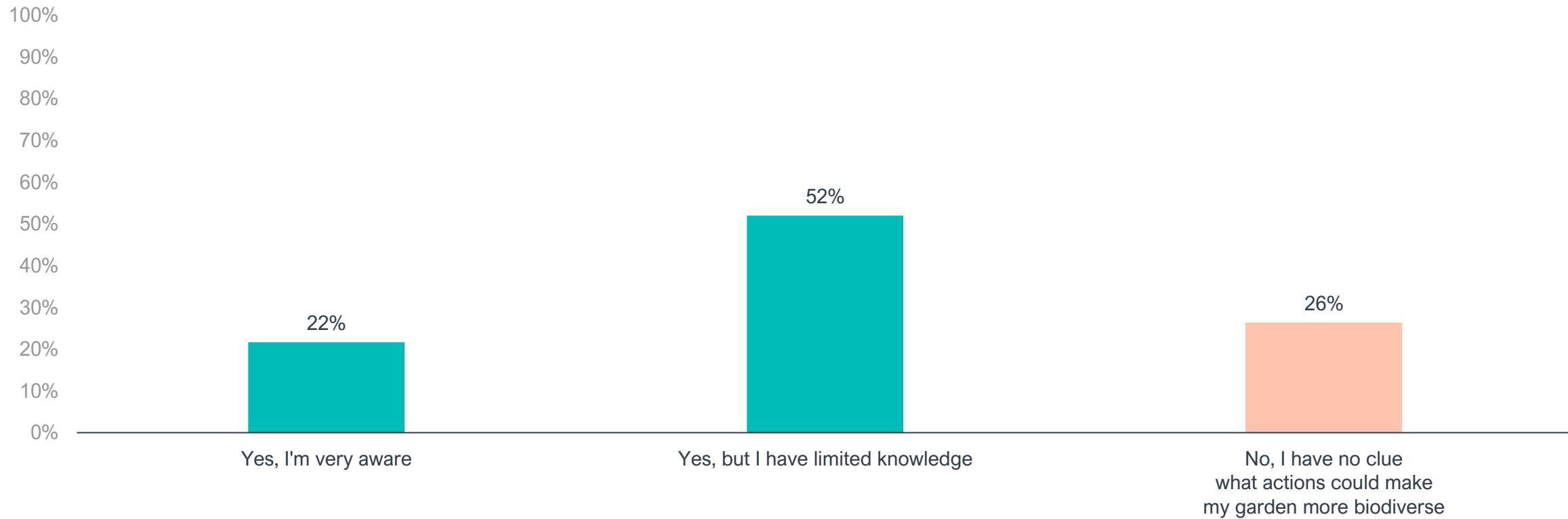
Nepa

Around half of the study population state that they know what actions to take but have limited knowledge, one fourth have no clue

Biodiversity awareness and perception 5/5



Awareness of actions to make own garden more biodiverse



Base: 506 IP

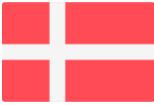
Q: Do you know what actions you can take to make your garden more biodiverse?

45

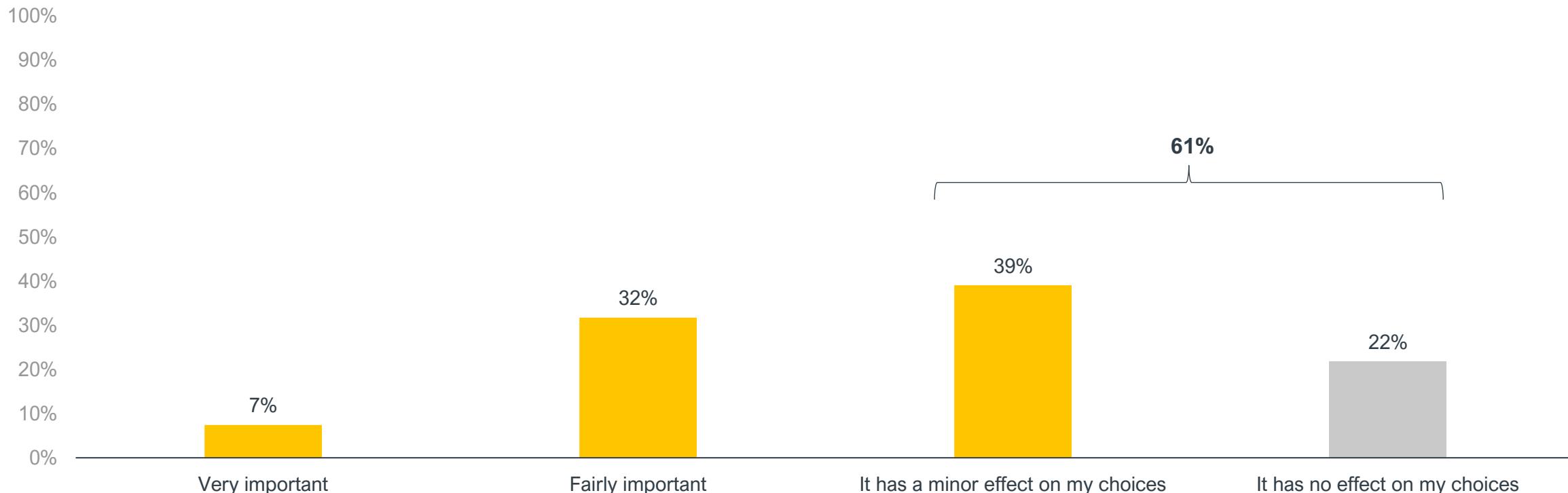
Nepa

Compared to other markets, biodiversity has lower impact on the Danes choices when they plan their garden projects

Biodiversity behaviour and maturity 1/5



Importance of biodiversity when planning garden projects

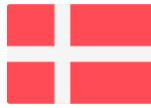


Base: 506 IP

Q: When you plan your garden projects, how important is biodiversity?

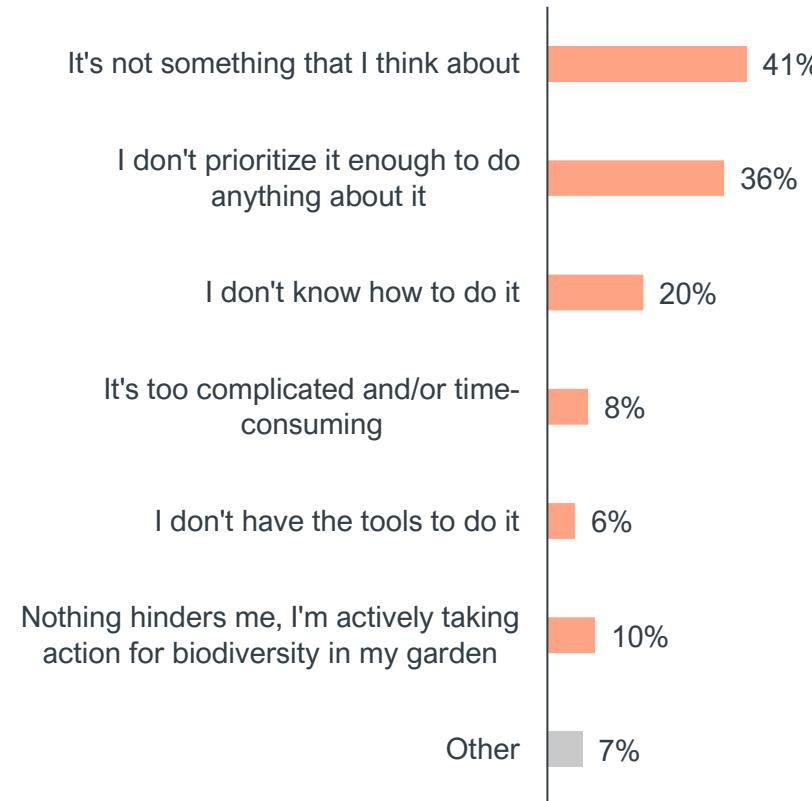
46

"It's not something I think about" and lack of prioritization are main barriers while a better understanding would make the Danes more likely to increase biodiversity in the own garden

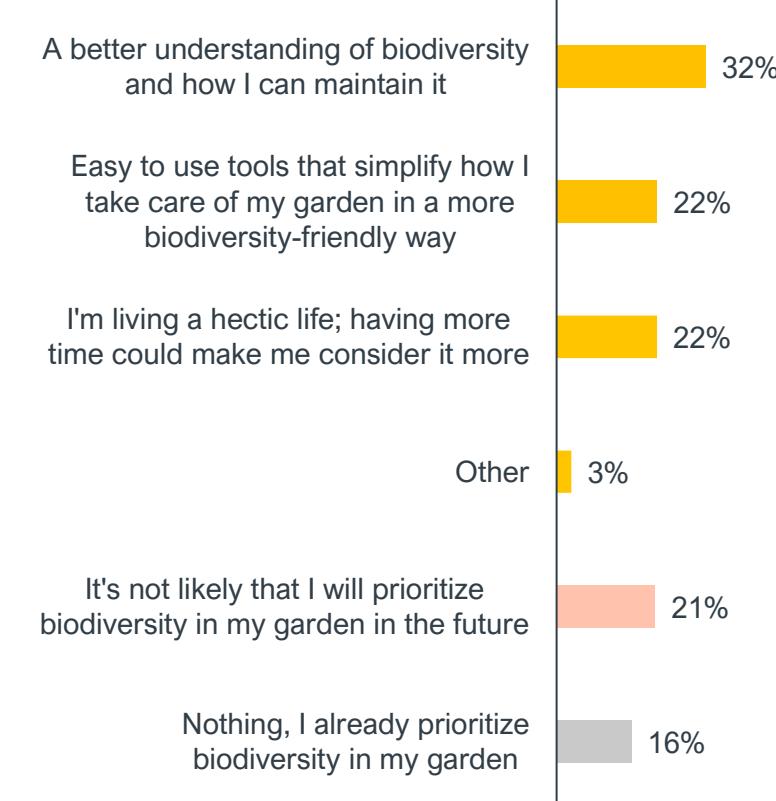


Biodiversity behaviour and maturity 2/5

Barriers for making the garden more biodiverse



What would make consumers more likely to increase biodiversity in their garden

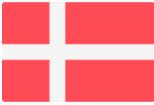


Base: Barriers – 306 IP, More likely to increase – 506 IP

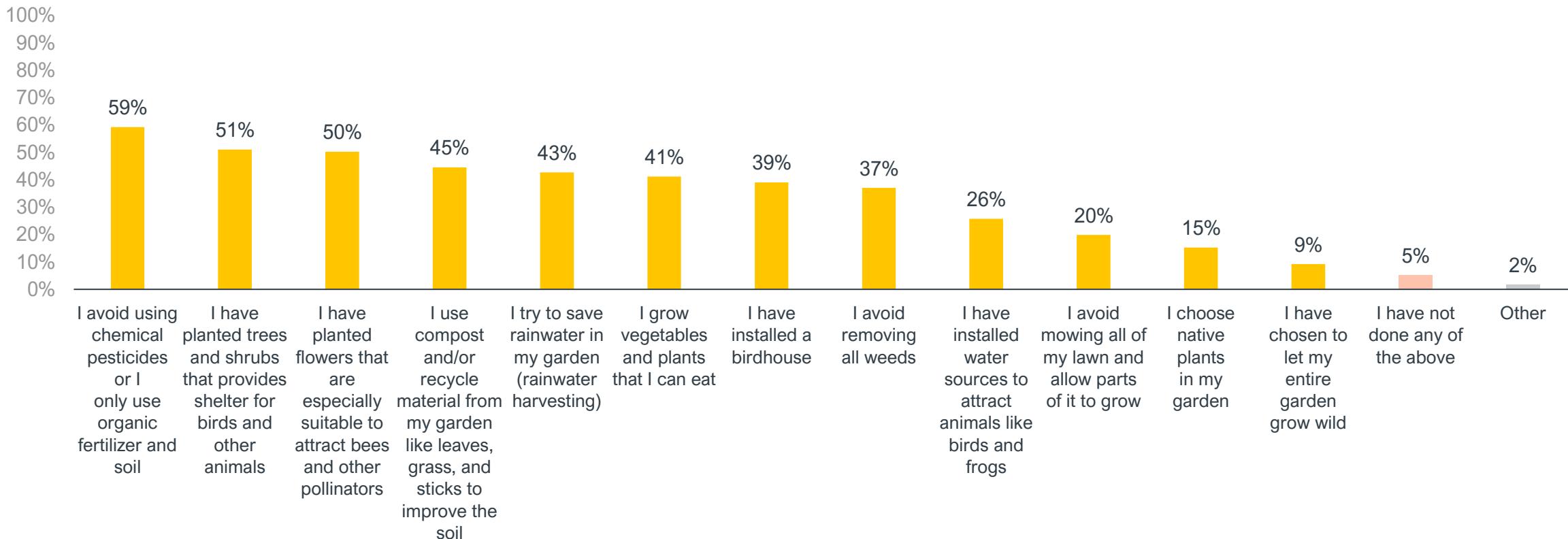
Q: What – if something – hinders you from making your garden more biodiverse? What would make you more likely to increase biodiversity in your garden?

Avoid chemical pesticides is the most common action taken – relatively few (~20%) avoid mowing all of their lawn

Biodiversity behaviour and maturity 3/5



Which biodiversity actions taken in the own garden

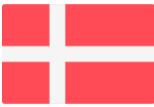


Base: 373 IP

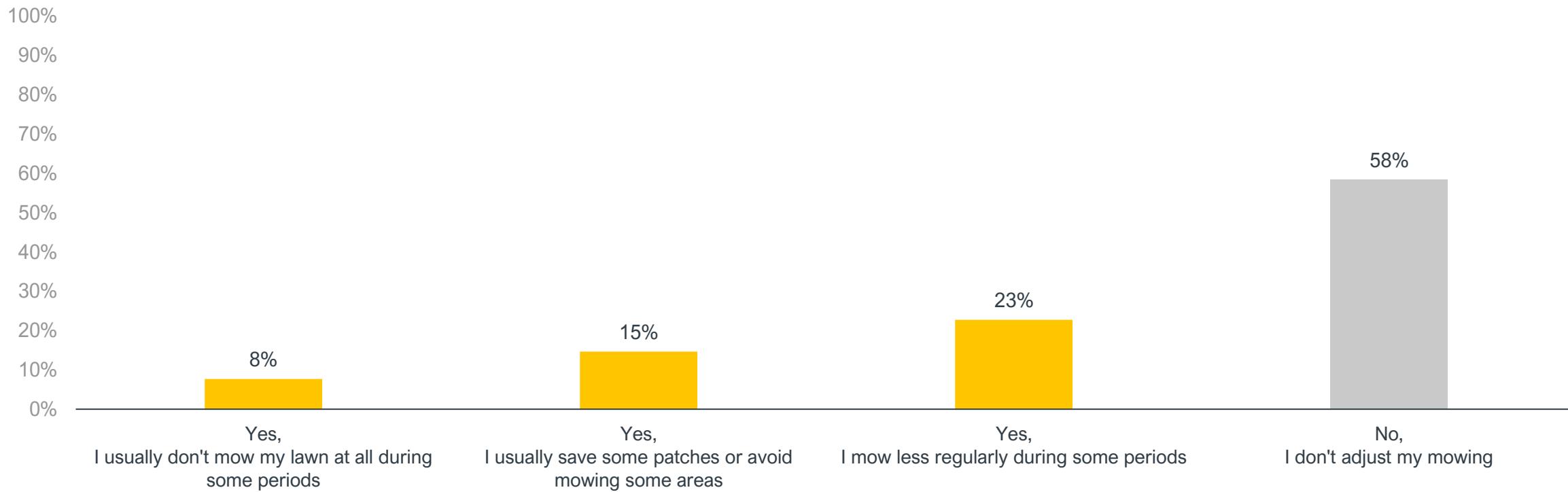
Q: Which of these actions have you taken to increase biodiversity in your garden?

~60% states that they don't consider biodiversity when mowing their lawn (they do no adjustments)

Biodiversity behaviour and maturity 4/5



Share who considers biodiversity when moving their lawn



Base: 506 IP

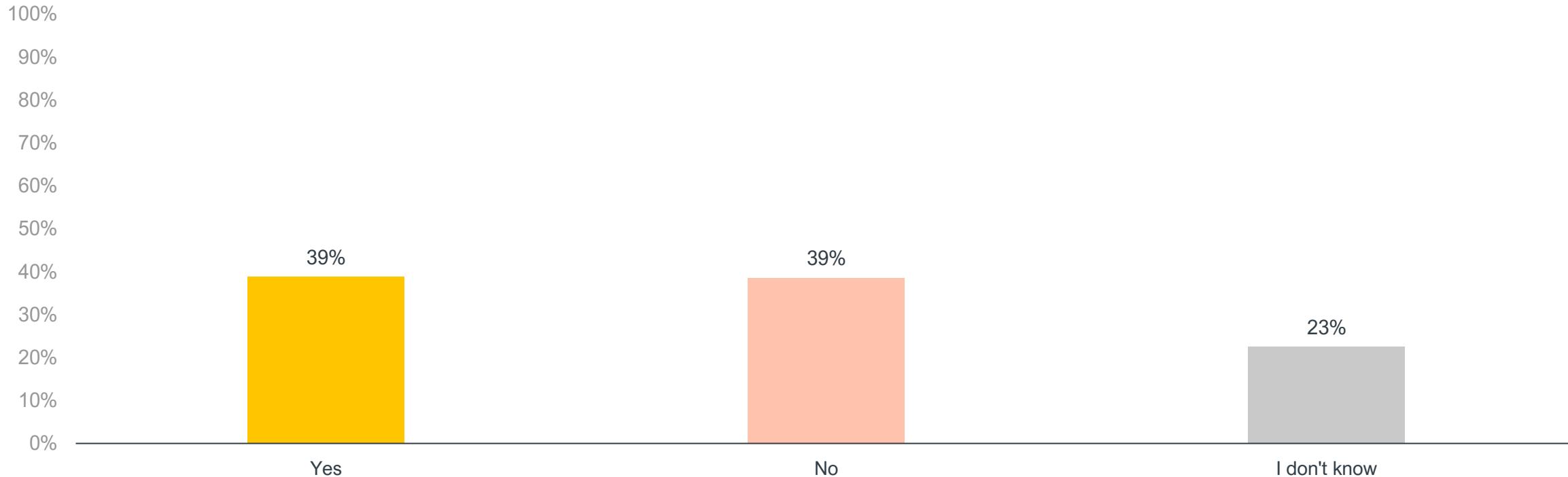
Q: Do you consider biodiversity when mowing your lawn?

The Danes are the least interested in learning more about how to promote biodiversity in their own gardens compared to other markets

Biodiversity behaviour and maturity 5/5



Would you like to learn more about ways to let biodiversity thrive in your garden?



Base: 506 IP

Q: Would you like to learn more about ways to let biodiversity thrive in your garden?

50

Nepa

Summary: Denmark



Overview potential market	<ul style="list-style-type: none">58% of the Danish population state that they own a garden with a lawn
Garden behaviour	<ul style="list-style-type: none">55% spend 8 hours or less per month on gardening. Top priority is that the garden should be easy to take care of and ~50% want a mix of a wild and arranged garden
Biodiversity awareness and perception	<ul style="list-style-type: none">~77% are familiar or have some understanding of what biodiversity means (similar understanding compared to the other markets)“Different species of animals, insects and plants” are most often mentioned when the garden owners describe biodiversity with their own wordsCompared to other markets, the Danes are less worried about decreasing biodiversityDanish people are somewhat more sceptic to that their own garden can boost the biodiversity compared to others (9% believes it has no effect)Around half of the study population state that they know what actions to take but have limited knowledge, one fourth have no clue
Biodiversity behaviour and maturity	<ul style="list-style-type: none">Compared to other markets, biodiversity has lower impact on the Danes choices when they plan their garden projects“It’s not something I think about” and lack of prioritization are main barriers while a better understanding would make the Danes more likely to increase biodiversity in the own gardenAvoid chemical pesticides is the most common action taken – relatively few (~20%) avoid mowing all of their lawn~60% states that they don’t consider biodiversity when mowing their lawn (they do no adjustments)The Danes are the least interested in learning more about how to promote biodiversity in their own gardens compared to other markets

Agenda

- Introduction to project
- Executive summary and recommendations
- **Biodiversity awareness and behaviour**
 - Across markets
 - Sweden - *slide 24*
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 - Netherlands - *slide 94*
 - Belgium - *slide 108*
 - Poland - *slide 122*

64% of the UK population state that they own a garden with a lawn

Overview potential market 1/1



Share of population owning a garden with a lawn



Base: 786 IP

Q: Which of the following statements are correct when describing your home? (I own a garden with a lawn)

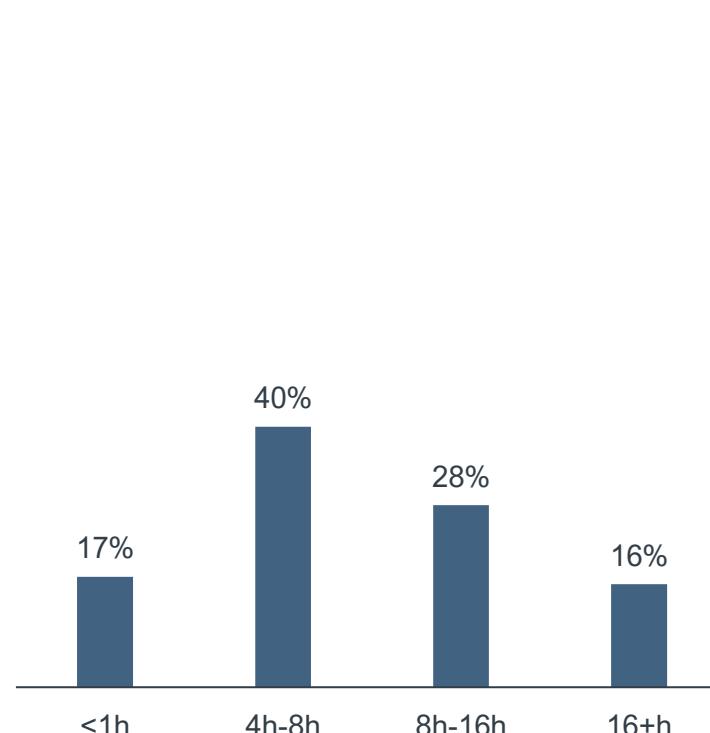
53

~60% spend 8 h or less per month on gardening. Top priority is to create a relaxing space and ~50% want a mix of a wild and arranged garden. That the garden boosts biodiversity has currently low prioritisation.

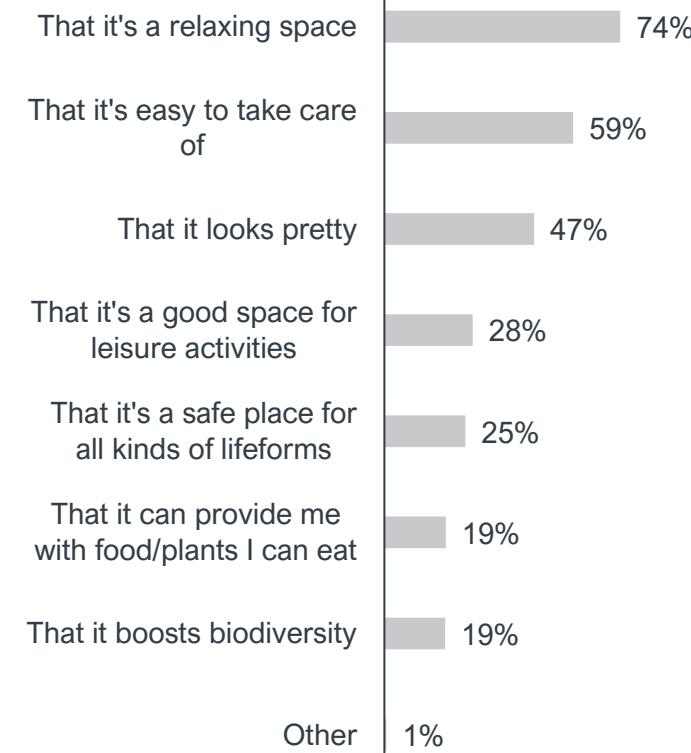


Garden behaviour 1/1

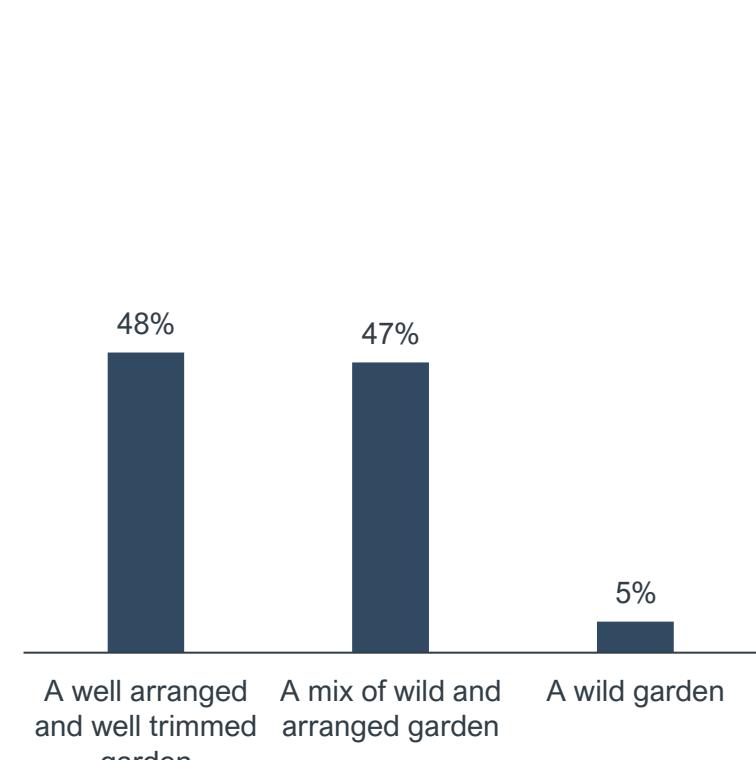
Time spend gardening during season



Top priorities when designing garden



Most attractive garden types



Base: 505 IP

Q: How much time do you spend gardening during the gardening season (i.e. spring/summer/autumn)?, What are your top priorities when designing your garden? (possible to choose max 3 options), Which of these garden types is most attractive according to you?

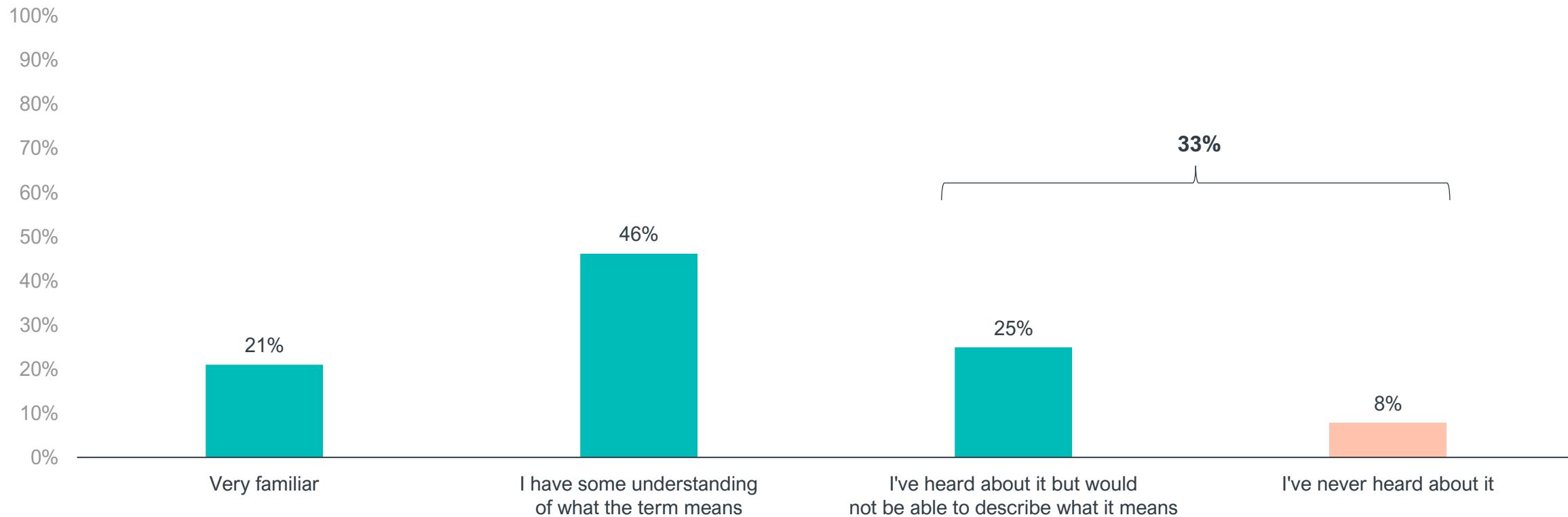
Nepa

The familiarity of the Biodiversity is relatively low in UK compared to the other markets, 33% are not aware of what the term means

Biodiversity awareness and perception 1/5



Awareness/familiarity with the term Biodiversity, % of lawn owners



Base: 505 IP

Q: How familiar are you with the term biodiversity?

55

Nepa

“Life, different species of plants and animals” are most often mentioned when the garden owners describe biodiversity with their own words



What does the term biodiversity mean?

environment together certain creatures certain habitats suitable diversity good means support garden world earth live habitats wide space thrive

organisms many natural don't

area nature various kinds birds plant

variety living particular flora mix fauna considered ecosystem idea bees

species animals

insects wildlife forms variability

plants

life

different

Base: 505 IP

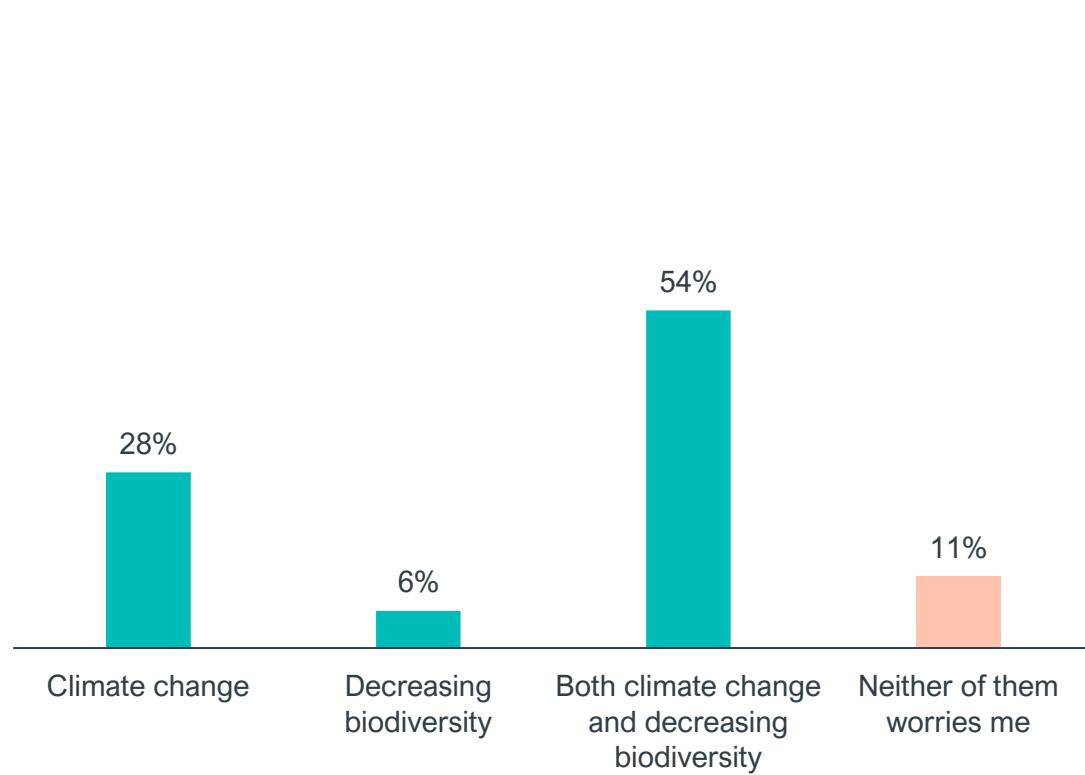
Q: What does the term biodiversity mean?

56

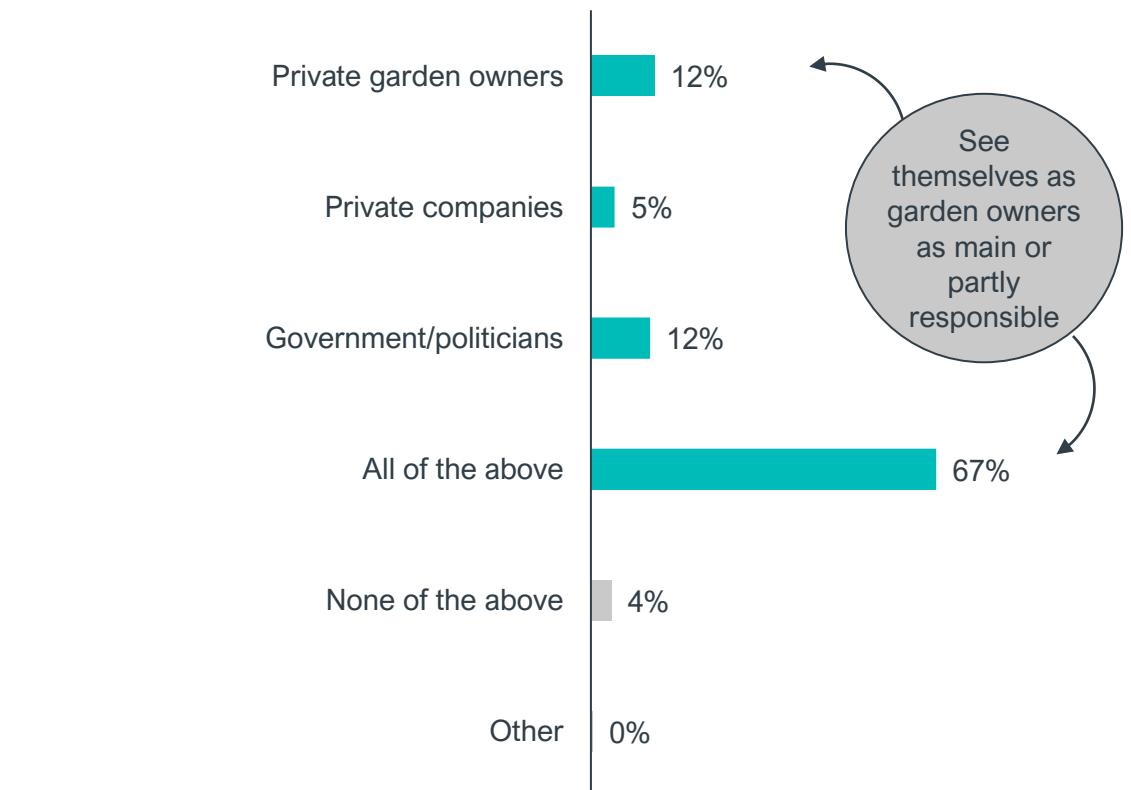
In UK, it is most common to be worried about both climate change and decreasing biodiversity, joint responsibility is stated



Sustainability issues that worries



Greatest responsibility in maintaining biodiversity



Base: 505 IP

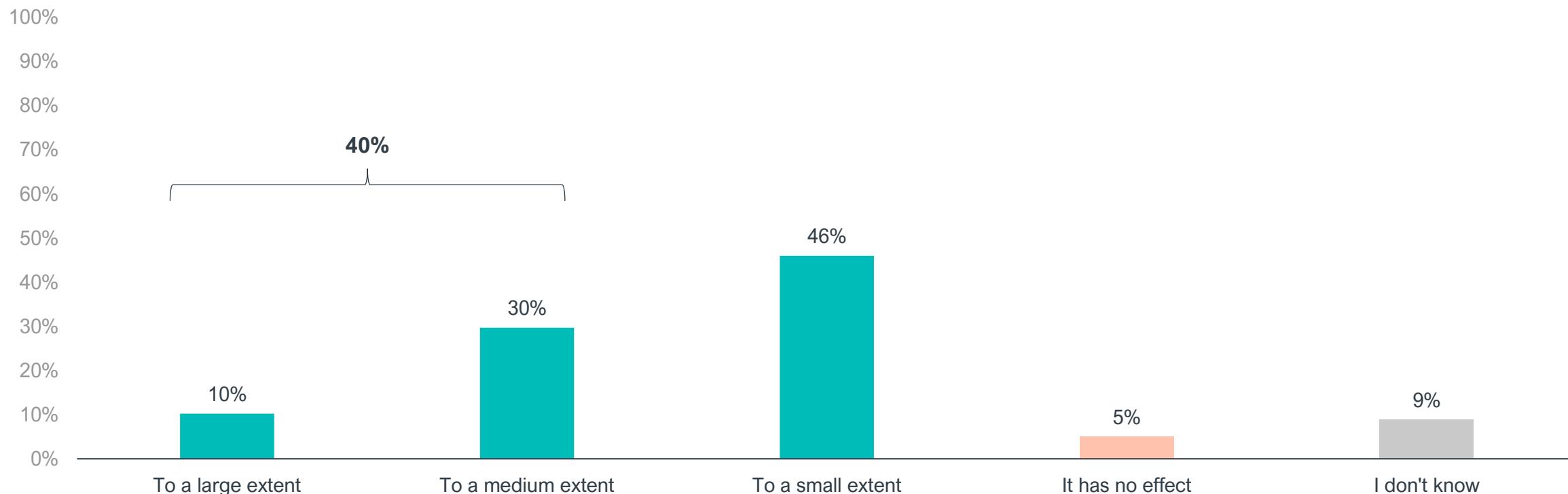
Q: Which of these sustainability issues worries you the most?, According to you, who carries the greatest responsibility in maintaining biodiversity?

40% believe that their own garden can help boost the biodiversity to a medium or large extent (relatively low compared to other markets)

Biodiversity awareness and perception 4/5



The perception of what extent the own garden can help boost biodiversity



Base: 505 IP

Q: To what extent do you think that your own garden can help boost biodiversity?

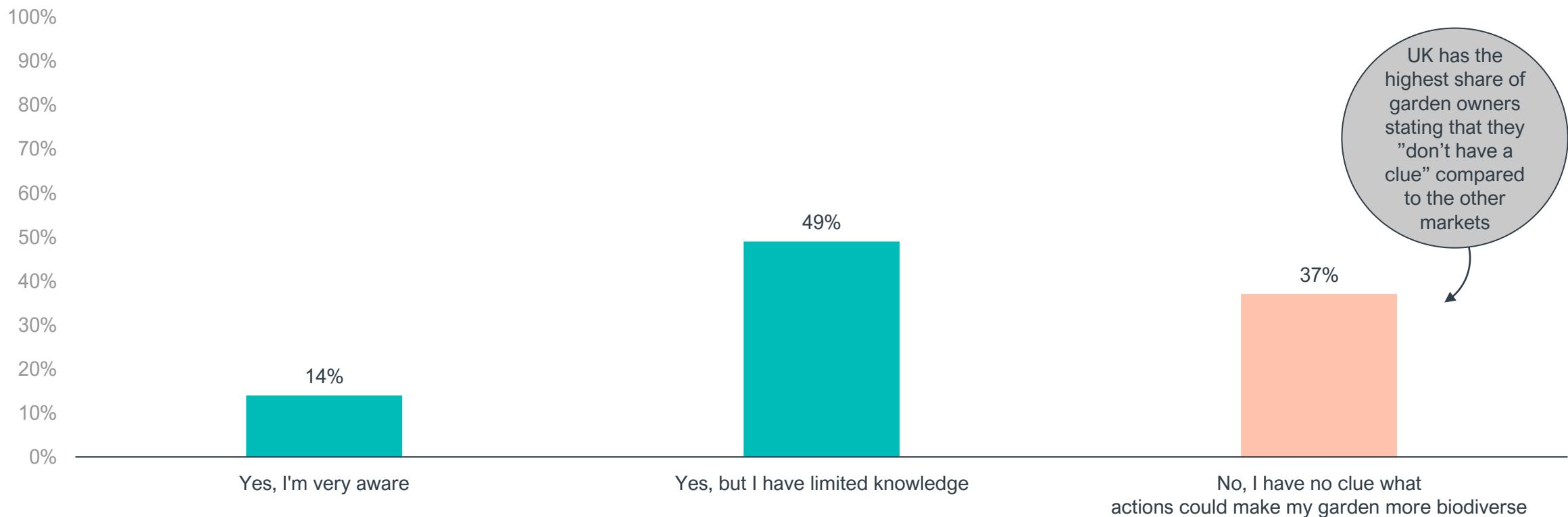
58

~40% say they don't have a clue of what actions they can take to make their own garden more biodiverse

Biodiversity awareness and perception 5/5



Awareness of actions to make own garden more biodiverse



Base: 505 IP

Q: Do you know what actions you can take to make your garden more biodiverse?

59

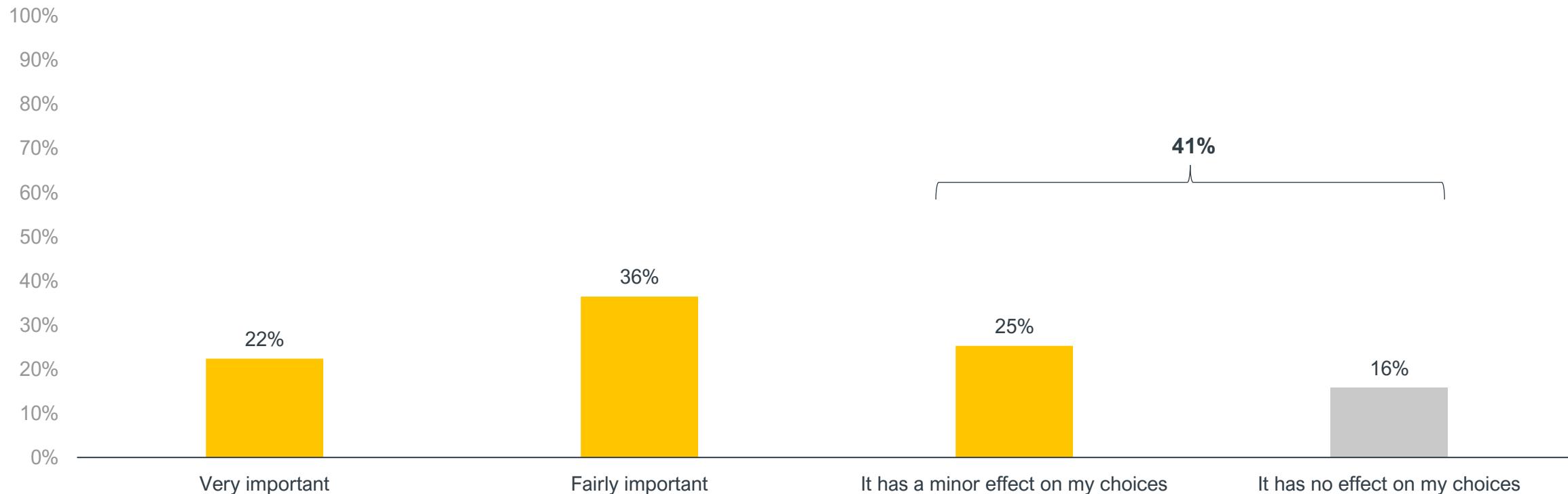
Nepa

~40% says that biodiversity has a minor or no effect on their choices when planning garden projects

Biodiversity behaviour and maturity 1/5



Importance of biodiversity when planning garden projects



Base: 505 IP

Q: When you plan your garden projects, how important is biodiversity?

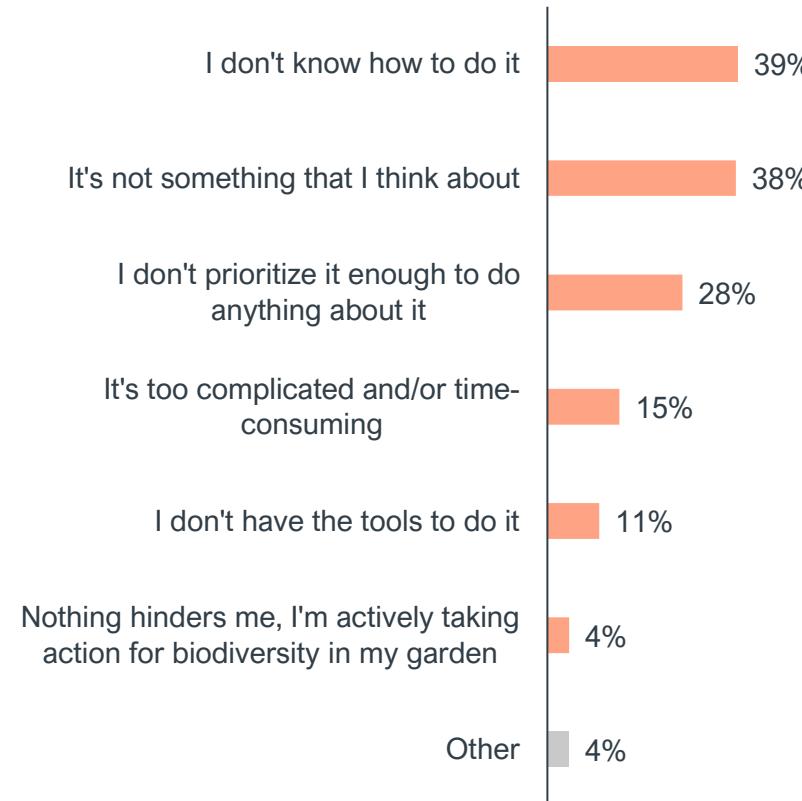
60

A better understanding of biodiversity and relevant actions to take would both reduce barriers and facilitate increased focus on biodiversity

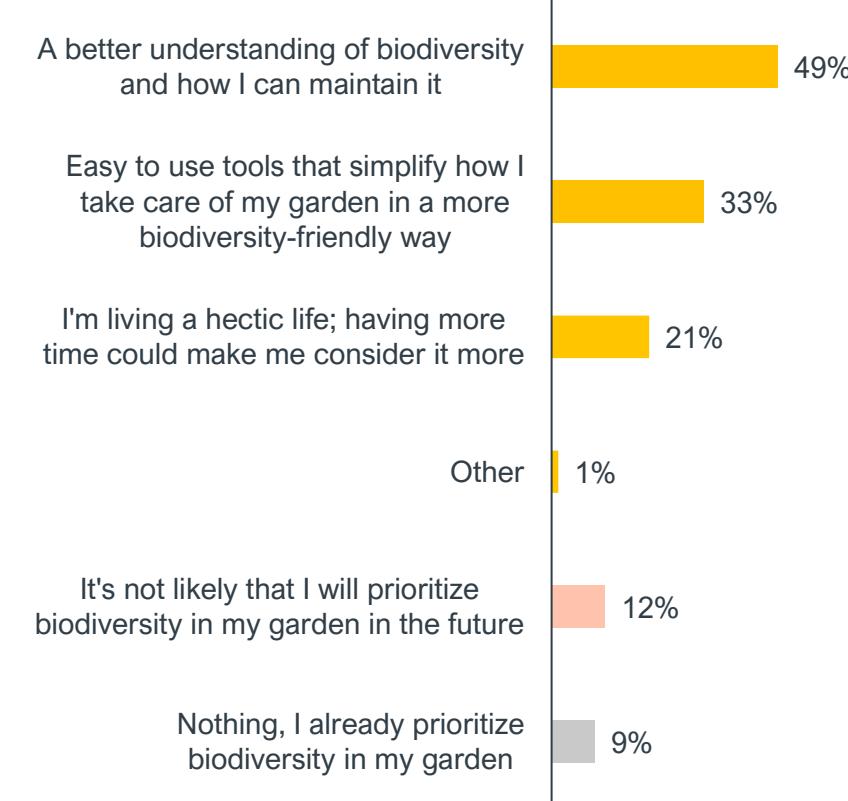
Biodiversity behaviour and maturity 2/5



Barriers for making the garden more biodiverse



What would make consumers more likely to increase biodiversity in their garden



Base: Barriers – 208 IP, More likely to increase – 505 IP

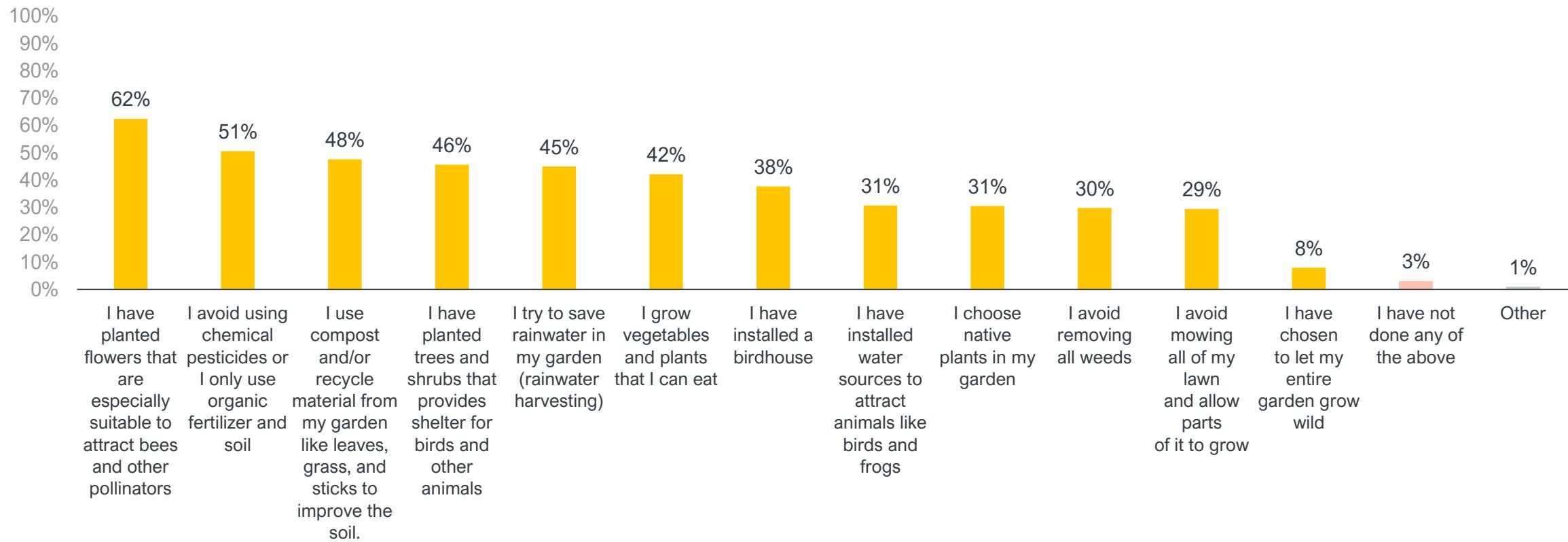
Q: What – if something – hinders you from making your garden more biodiverse? What would make you more likely to increase biodiversity in your garden?

Planting flowers that attract bees/other pollinators is the most common action made

Biodiversity behaviour and maturity 3/5



Which biodiversity actions taken in the own garden



Base: 317 IP

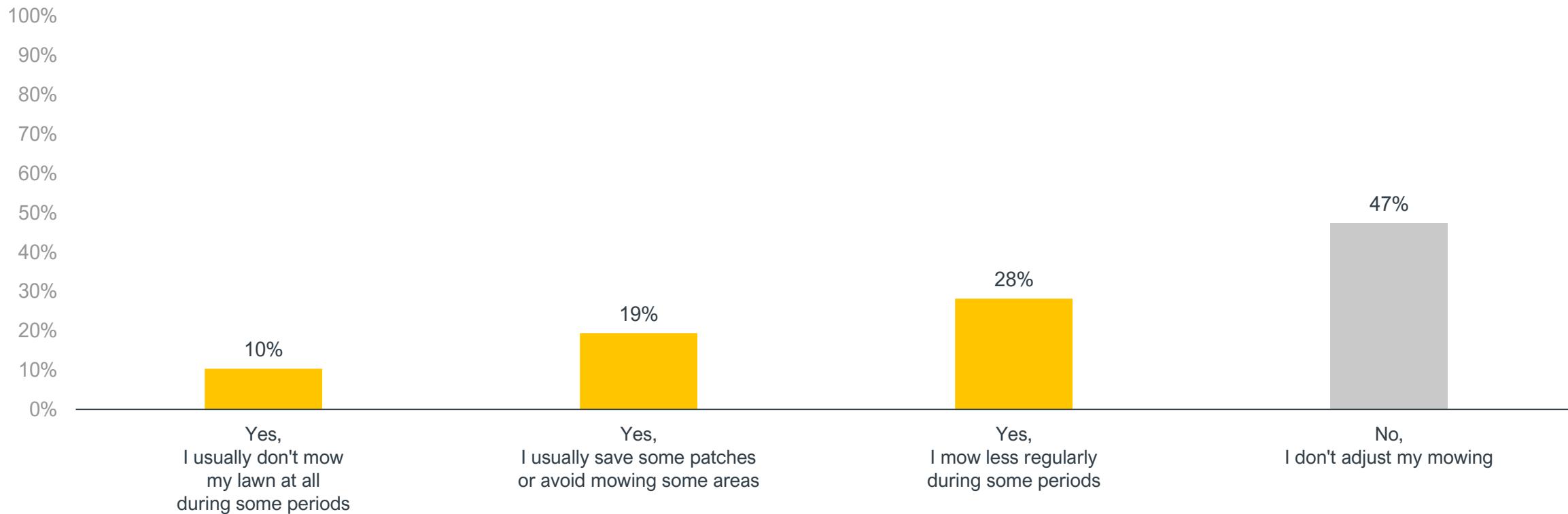
Q: Which of these actions have you taken to increase biodiversity in your garden?

~50 % states that they avoid mowing or mow less during some periods while ~50% don't adjust their mowing

Biodiversity behaviour and maturity 4/5



Share who considers biodiversity when moving their lawn



Base: 505 IP

Q: Do you consider biodiversity when mowing your lawn?

63

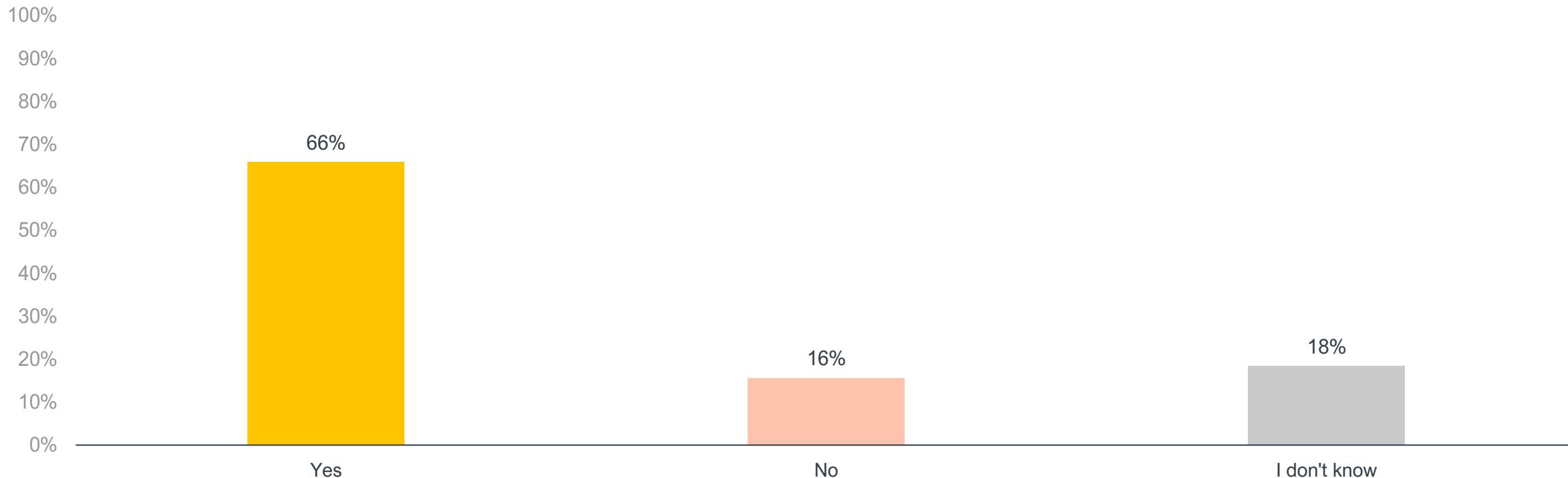
Nepa

The majority (66%) would like to learn more about ways to let biodiversity thrive in their garden

Biodiversity behaviour and maturity 5/5



Would you like to learn more about ways to let biodiversity thrive in your garden?



Base: 505 IP

Q: Would you like to learn more about ways to let biodiversity thrive in your garden?

64

Summary: UK



Overview potential market	<ul style="list-style-type: none">64% of the UK population state that they own a garden with a lawn
Garden behaviour	<ul style="list-style-type: none">~60% spend 8 h or less per month on gardening. Top priority is to create a relaxing space and ~50% want a mix of a wild and arranged garden. That the garden boosts biodiversity has currently low prioritisation.
Biodiversity awareness and perception	<ul style="list-style-type: none">The familiarity of the Biodiversity is relatively low in UK compared to the other markets, 33% are not aware of what the term means“Life, different species of plants and animals” are most often mentioned when the garden owners describe biodiversity with their own wordsIn UK, it is most common to be worried about both climate change and decreasing biodiversity, joint responsibility is stated40% believe that their own garden can help boost the biodiversity to a medium or large extent (relatively low compared to other markets)~40% say they don't have a clue of what actions they can take to make their own garden more biodiverse
Biodiversity behaviour and maturity	<ul style="list-style-type: none">~40% says that biodiversity has a minor or no effect on their choices when planning garden projectsA better understanding of biodiversity and relevant actions to take would both reduce barriers and facilitate increased focus on biodiversityPlanting flowers that attract bees/other pollinators is the most common action made~50 % states that they avoid mowing or mow less during some periods while ~50% don't adjust their mowingThe majority (66%) would like to learn more about ways to let biodiversity thrive in their garden

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48% of the German population state that they own a garden with a lawn

Overview potential market 1/1



Share of population owning a garden with a lawn



Base: 1051 IP

Q: Which of the following statements are correct when describing your home? (I own a garden with a lawn)

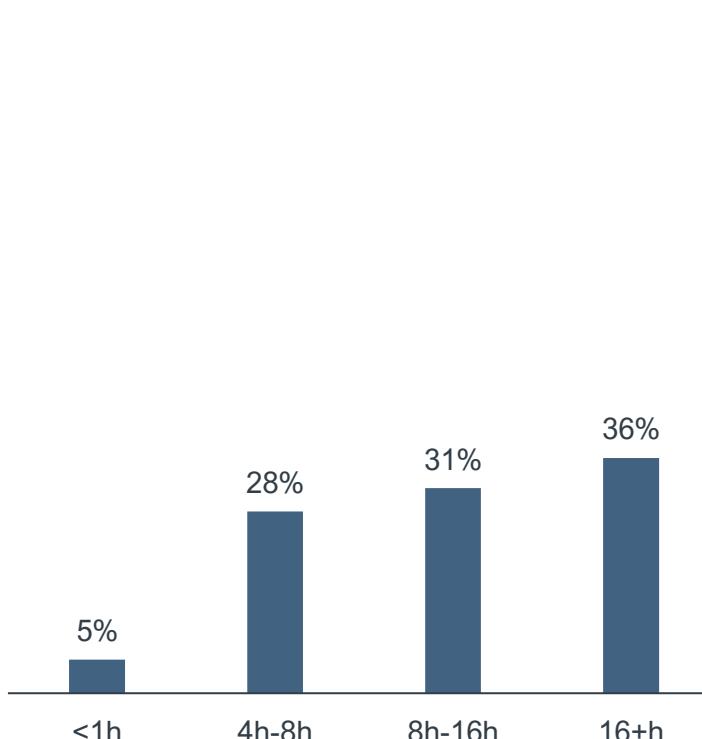
In Germany it's most attractive to have mix of a wild and arranged garden, 36% of the study population spend 16+h per week gardening

Garden behaviour

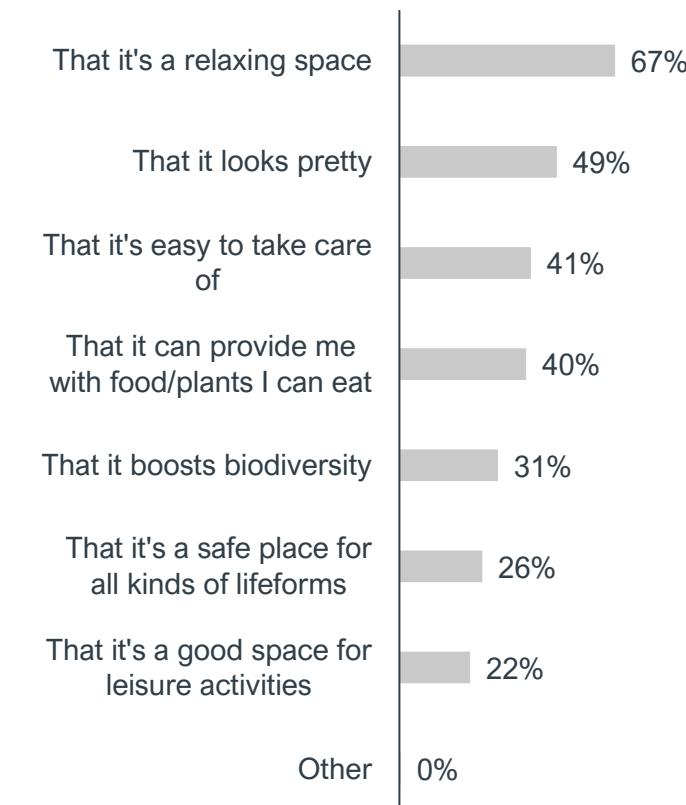
1/1



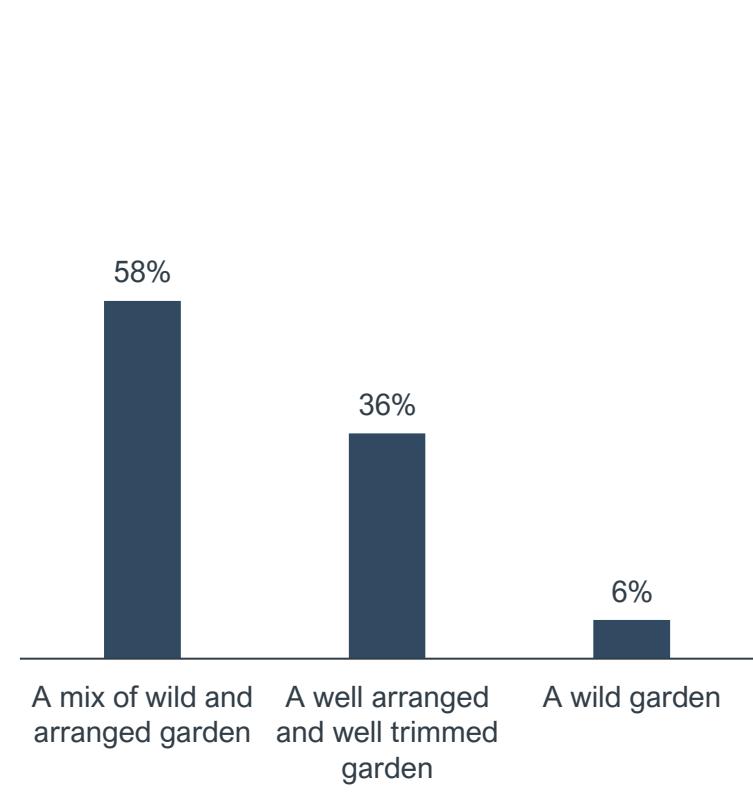
Time spend gardening during season



Top priorities when designing garden



Most attractive garden types



Base: 504 IP

Q: How much time do you spend gardening during the gardening season (i.e. spring/summer/autumn)?, What are your top priorities when designing your garden? (possible to choose max 3 options), Which of these garden types is most attractive according to you?

Nepa

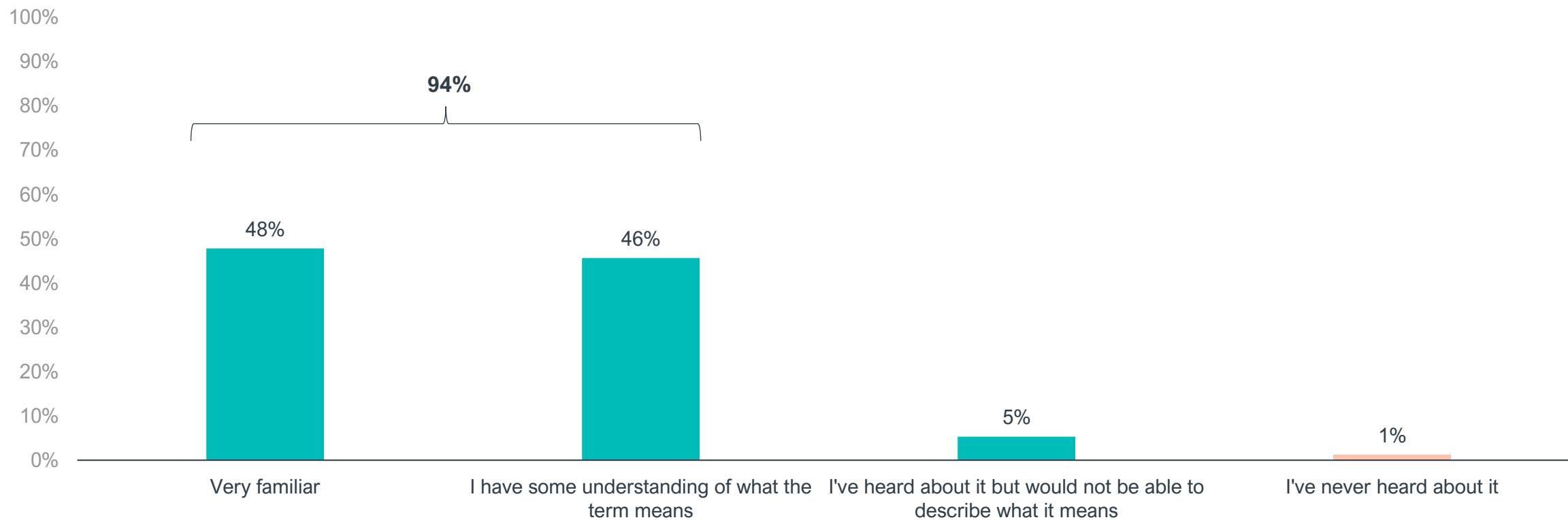
Awareness of biodiversity is very high, only 1% have never heard of it and 94% are either very familiar or somewhat familiar to the term

Biodiversity awareness and perception

1/5



Awareness/familiarity with the term Biodiversity, % of lawn owners



Base: 504 IP

Q: How familiar are you with the term biodiversity?

69

Nepa

“Many different types of animals and plants” is often mentioned when the respondents are asked to describe the term in their own words



What does the term biodiversity mean?



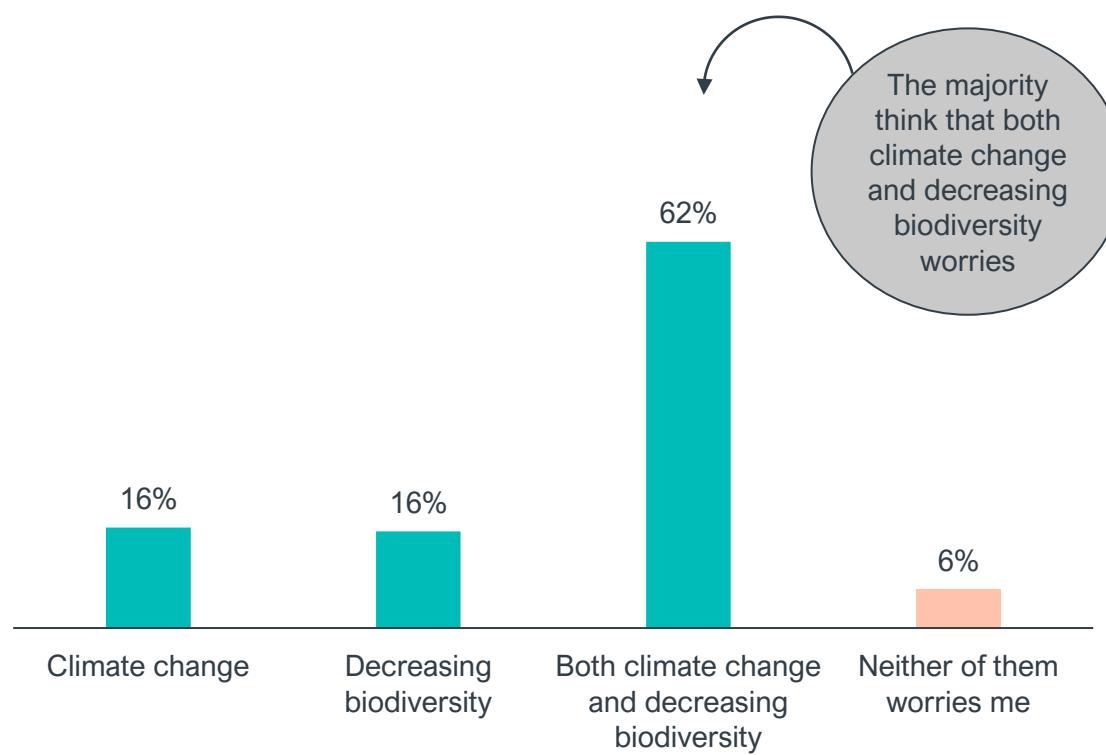
different, animals, many, types, plants, species, live, variety, insects, flora, garden, living, number, flowers, certain, certain, biological, habitat, life, bees, space, kinds, land, one, area, several, birds, fauna, plant, diversity, things

German garden owners place great responsibility on themselves in maintaining biodiversity even though majority think it's a joint effort

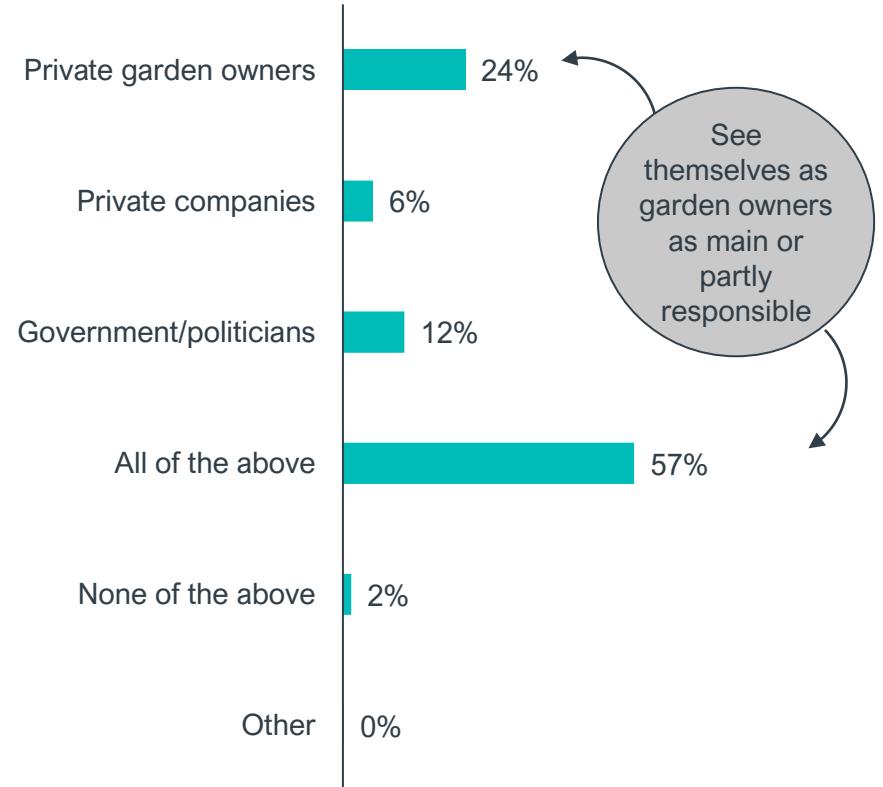
Biodiversity awareness and perception 3/5



Sustainability issues that worries



Greatest responsibility in maintaining biodiversity



Base: 504 IP

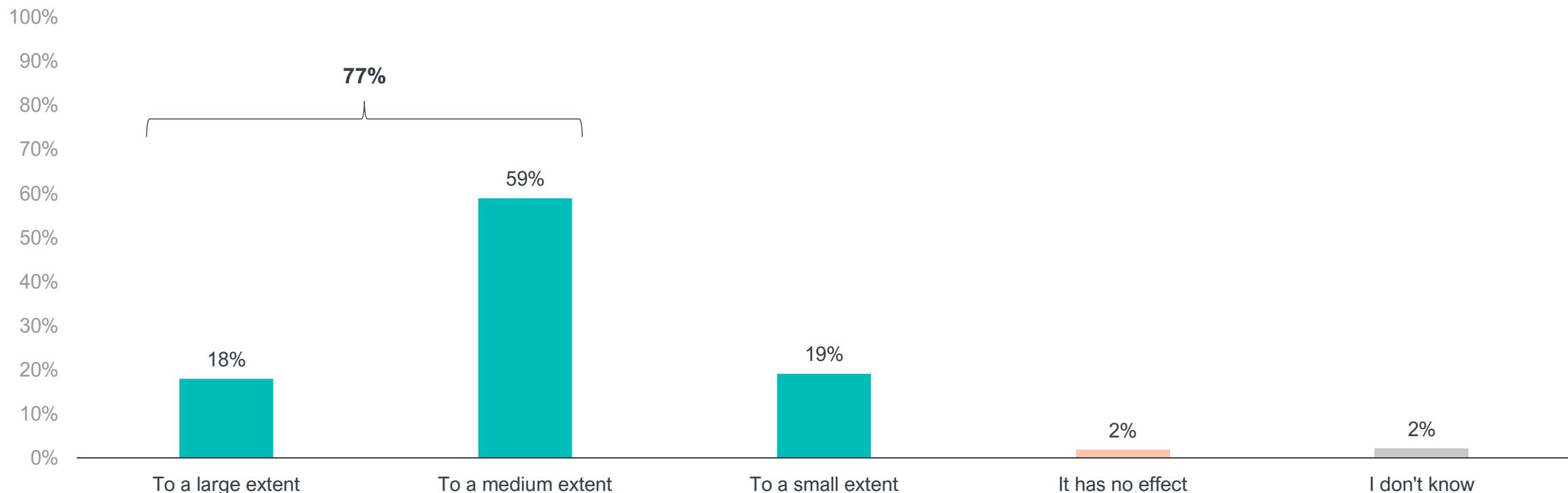
Q: Which of these sustainability issues worries you the most?, According to you, who carries the greatest responsibility in maintaining biodiversity?

~80% think that their own garden can help boost the biodiversity to a medium or large extent

Biodiversity awareness and perception 4/5



The perception of what extent the own garden can help boost biodiversity



Base: 504 IP

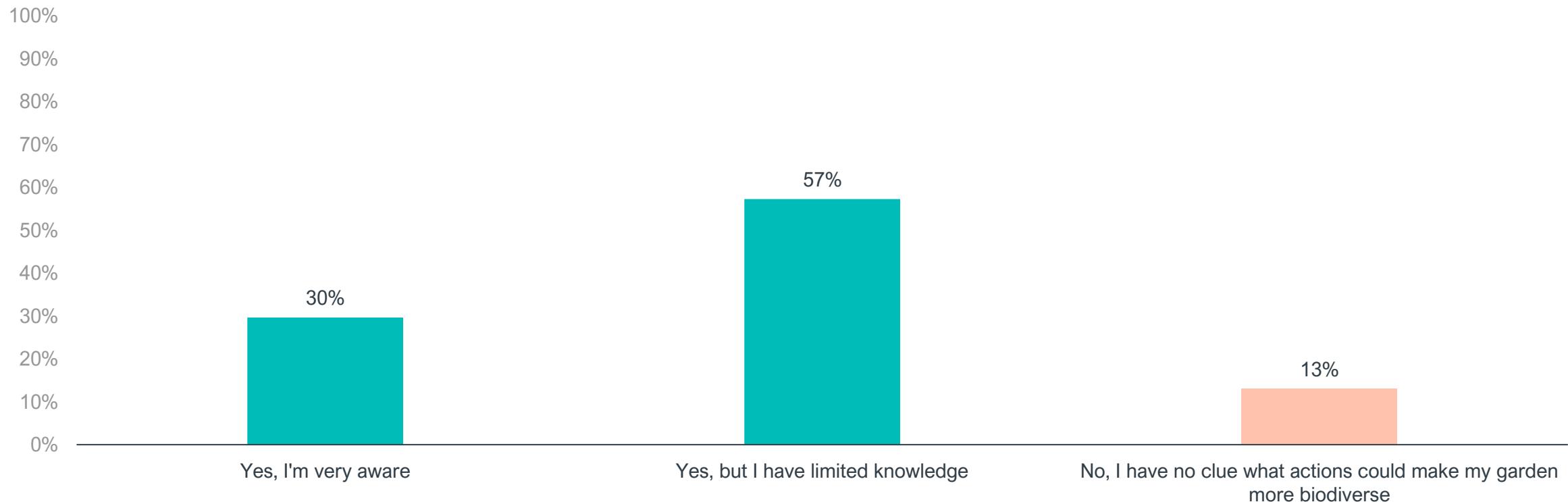
Q: To what extent do you think that your own garden can help boost biodiversity?

A large share also believe that they have the knowledge to act, only 13% don't know how to make the garden more biodiverse

Biodiversity awareness and perception 5/5



Awareness of actions to make own garden more biodiverse



Base: 504 IP

Q: Do you know what actions you can take to make your garden more biodiverse?

73

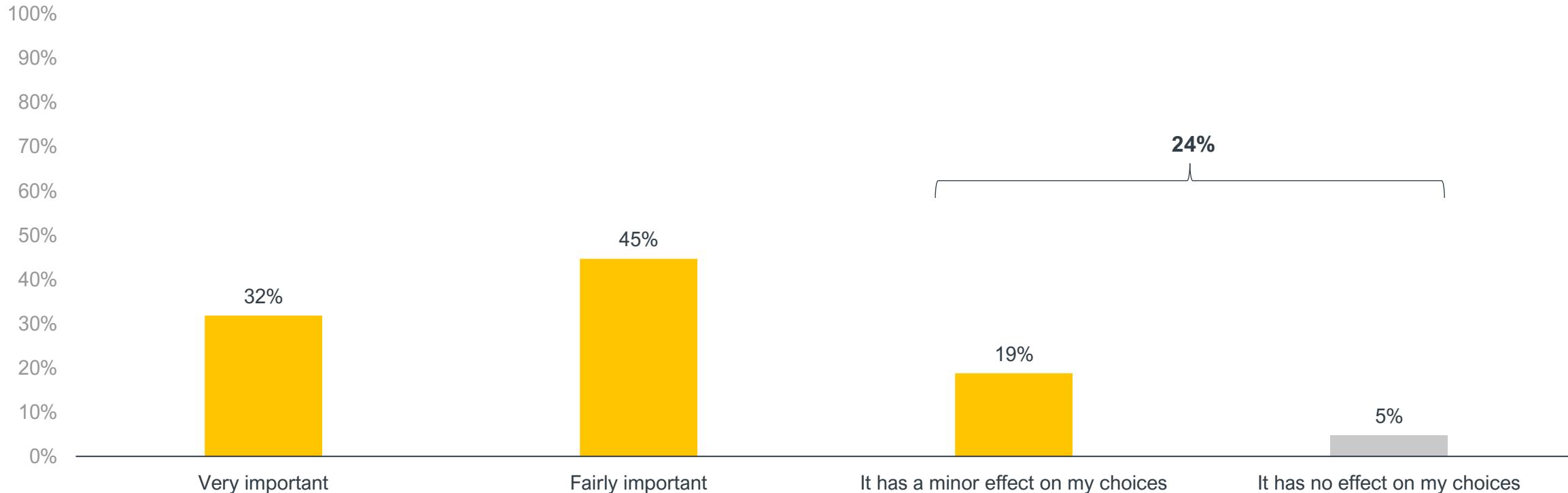
The Germans understand the importance of biodiversity when planning garden projects, only 24% say it has minor or no effect

Biodiversity behaviour and maturity

1/5



Importance of biodiversity when planning garden projects



Base: 504 IP

Q: When you plan your garden projects, how important is biodiversity?

74

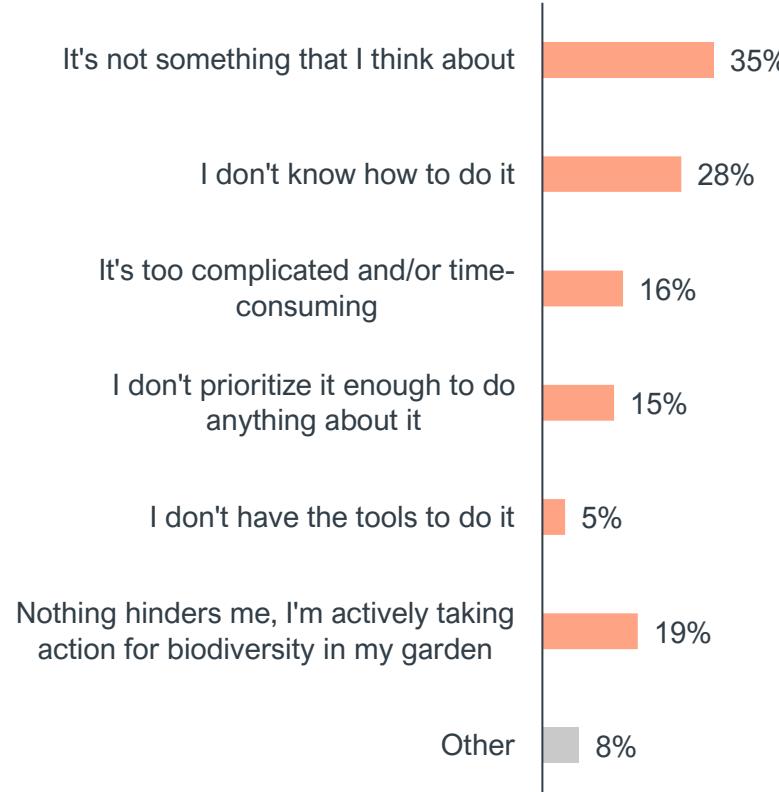
Nepa

Although Germany is at the forefront of biodiversity, more knowledge and a better understanding is needed to increase it

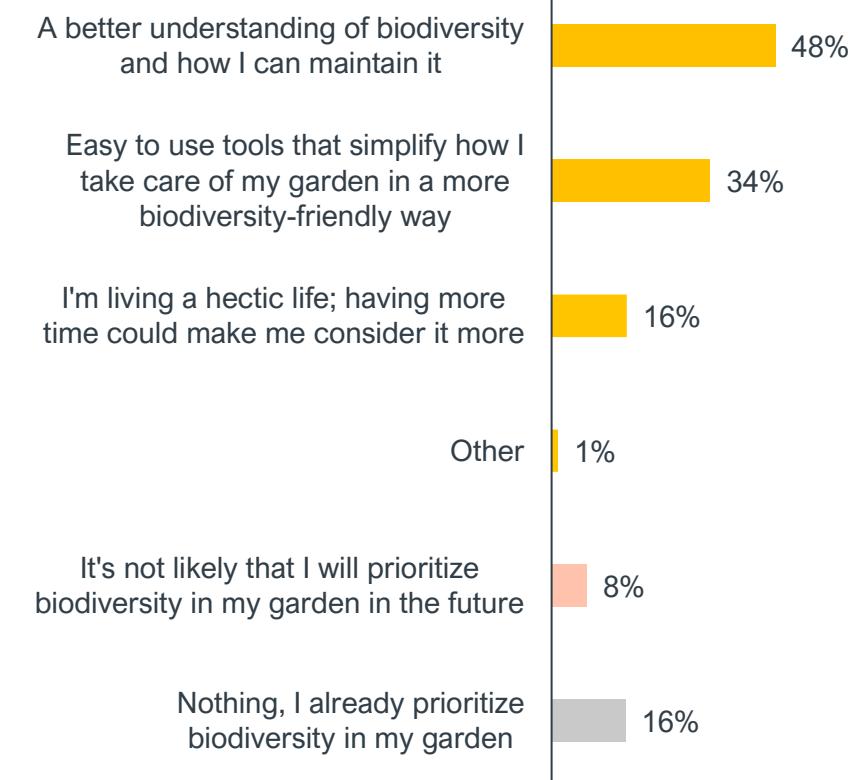
Biodiversity behaviour and maturity 2/5



Barriers for making the garden more biodiverse



What would make consumers more likely to increase biodiversity in their garden



Base: Barriers – 116 IP, More likely to increase – 504 IP

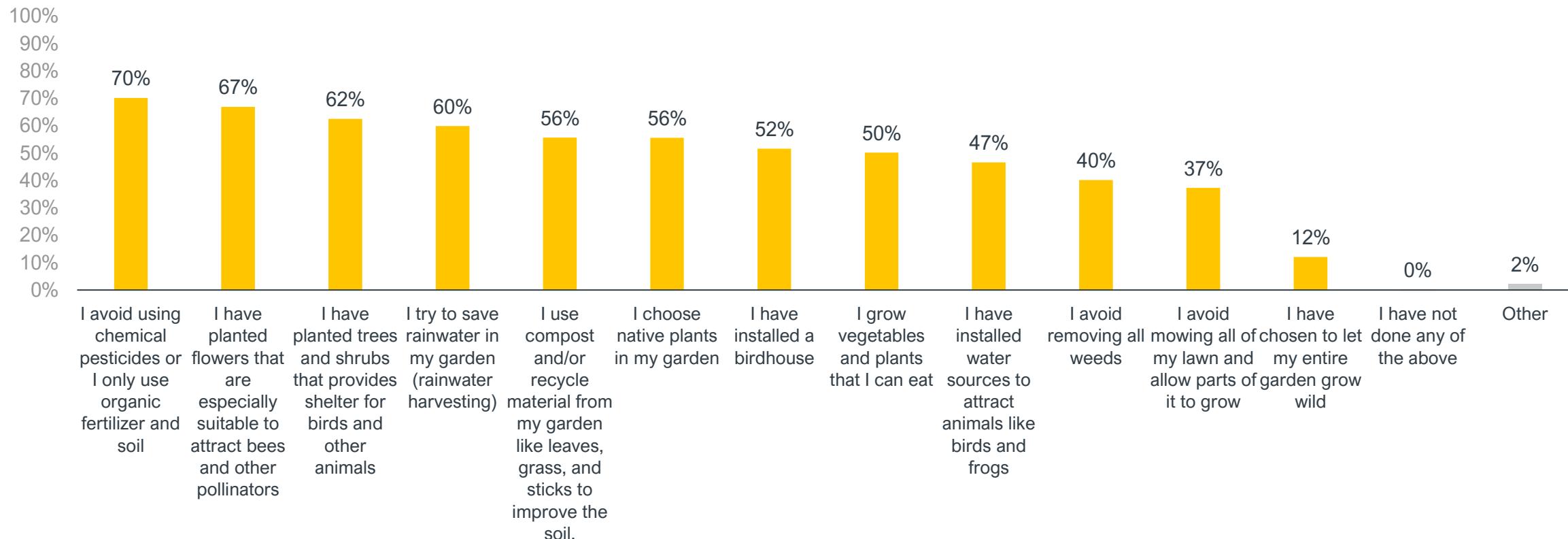
Q: What – if something – hinders you from making your garden more biodiverse? What would make you more likely to increase biodiversity in your garden?

The most common action to increase biodiversity is to avoid chemical pesticides and to plant flowers that attract pollinators

Biodiversity behaviour and maturity 3/5



Which biodiversity actions taken in the own garden



Base: 438 IP

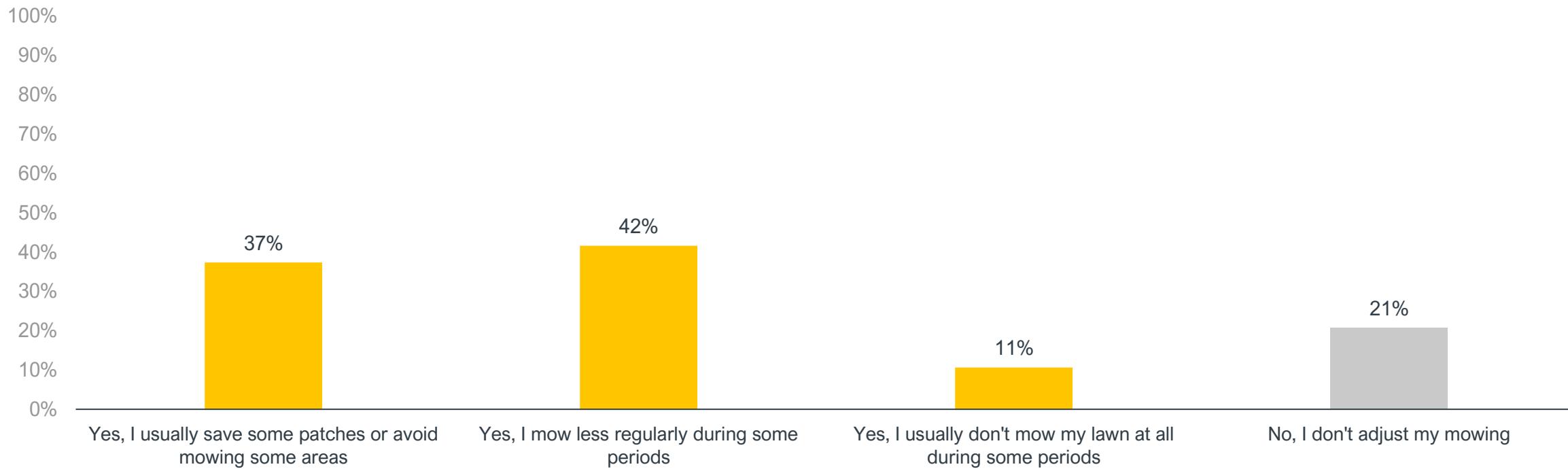
Q: Which of these actions have you taken to increase biodiversity in your garden?

~80% are considering biodiversity when mowing the lawn, either by mowing less often or by avoiding some areas

Biodiversity behaviour and maturity 4/5



Share who considers biodiversity when moving their lawn



Base: 504 IP

Q: Do you consider biodiversity when mowing your lawn?

77

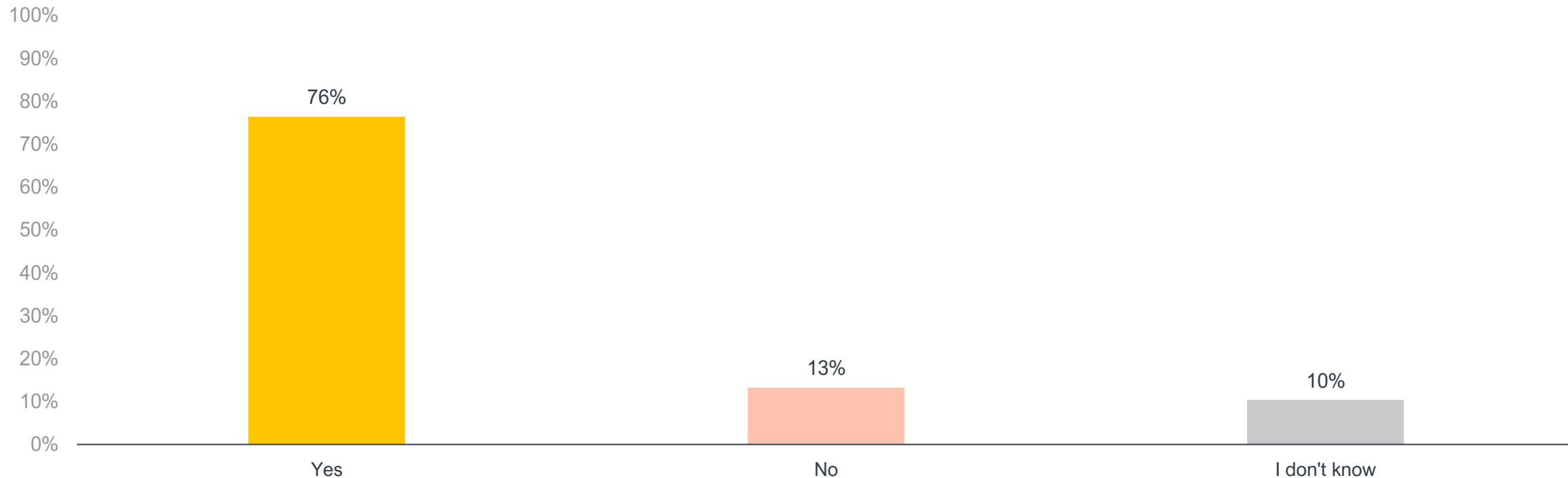
Nepa

Despite the already high level of awareness, 76% of the German garden owners want to learn more about biodiversity

Biodiversity behaviour and maturity 5/5



Would you like to learn more about ways to let biodiversity thrive in your garden?



Base: 504 IP

Q: Would you like to learn more about ways to let biodiversity thrive in your garden?

78

Summary: Germany



Overview potential market	<ul style="list-style-type: none">48% of the German population state that they own a garden with a lawn
Garden behaviour	<ul style="list-style-type: none">In Germany it's most attractive to have mix of a wild and arranged garden, 36% of the study population spend 16+h per week gardening
Biodiversity awareness and perception	<ul style="list-style-type: none">Awareness of biodiversity is very high, only 1% have never heard of it and 94% are either very familiar or somewhat familiar to the term"Many different types of animals and plants" is often mentioned when the respondents are asked to describe the term in their own wordsGerman garden owners place great responsibility on themselves in maintaining biodiversity even though majority think it's a joint effort~80% think that their own garden can help boost the biodiversity to a medium or large extentA large share also believe that they have the knowledge to act, only 13% don't know how to make the garden more biodiverse
Biodiversity behaviour and maturity	<ul style="list-style-type: none">The Germans understand the importance of biodiversity when planning garden projects, only 24% say it has minor or no effectAlthough Germany is at the forefront of biodiversity, more knowledge and a better understanding is needed to increase itThe most common action to increase biodiversity is to avoid chemical pesticides and to plant flowers that attract pollinators~80% are considering biodiversity when mowing the lawn, either by mowing less often or by avoiding some areasDespite the already high level of awareness, 76% of the German garden owners want to learn more about biodiversity

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51% of the French population state that they own a garden with a lawn

Overview potential market 1/1



Share of population owning a garden with a lawn



Base: 996 IP

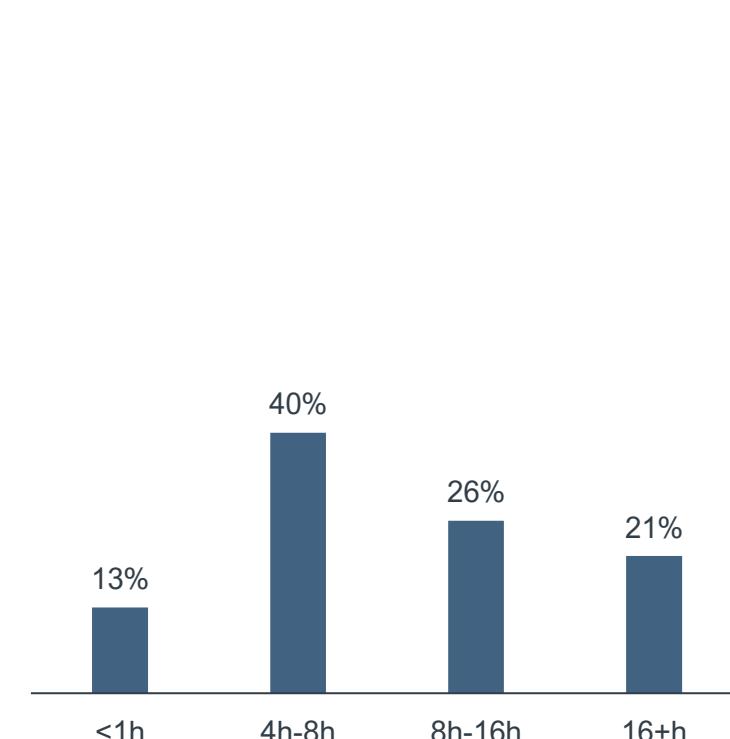
Q: Which of the following statements are correct when describing your home? (I own a garden with a lawn)

French people are more interested in that their garden provides them with food/eatable plants compared to other markets. 52% wants to have a well arranged and trimmed garden while 45% wants a mix

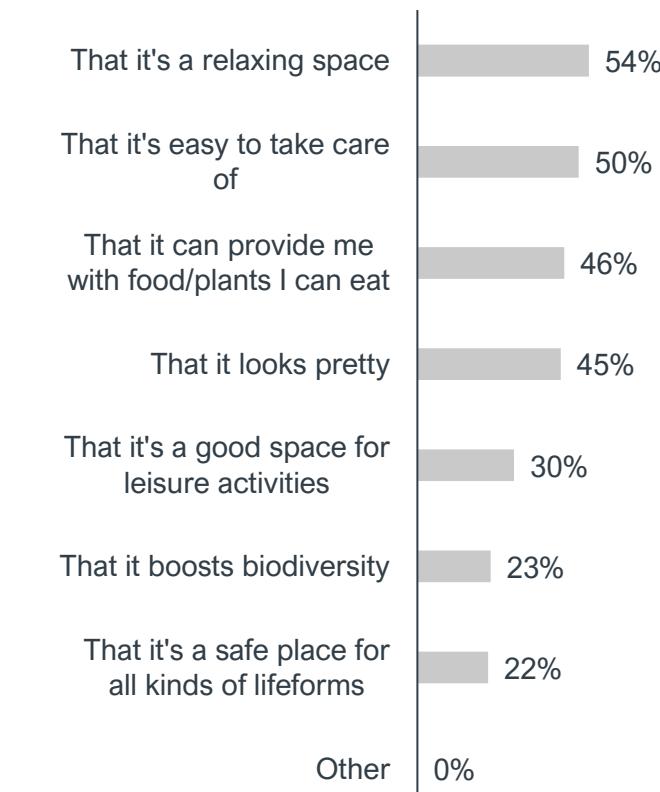
Garden behaviour 1/1



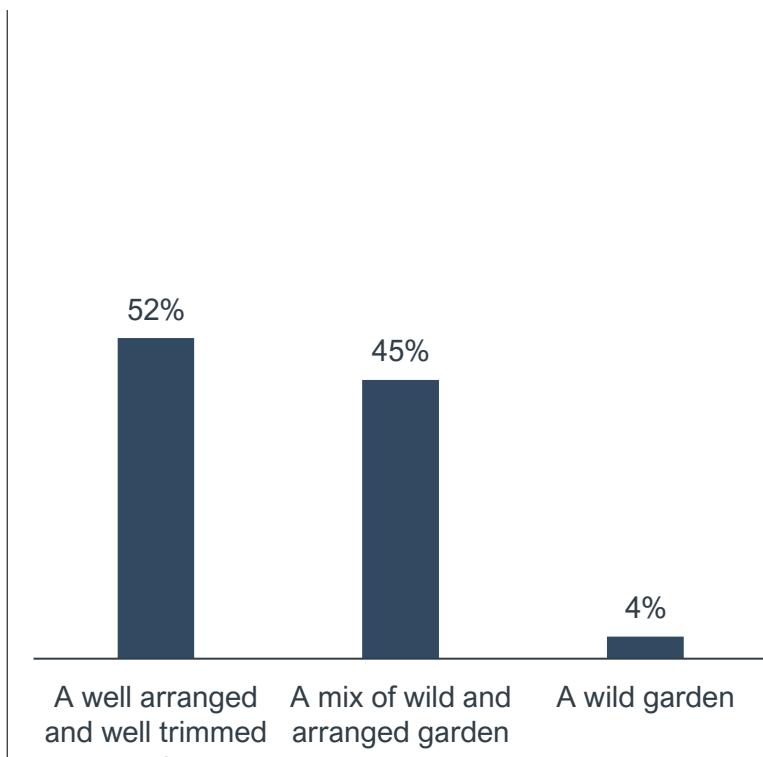
Time spent gardening during season



Top priorities when designing garden



Most attractive garden types



Base: 503 IP

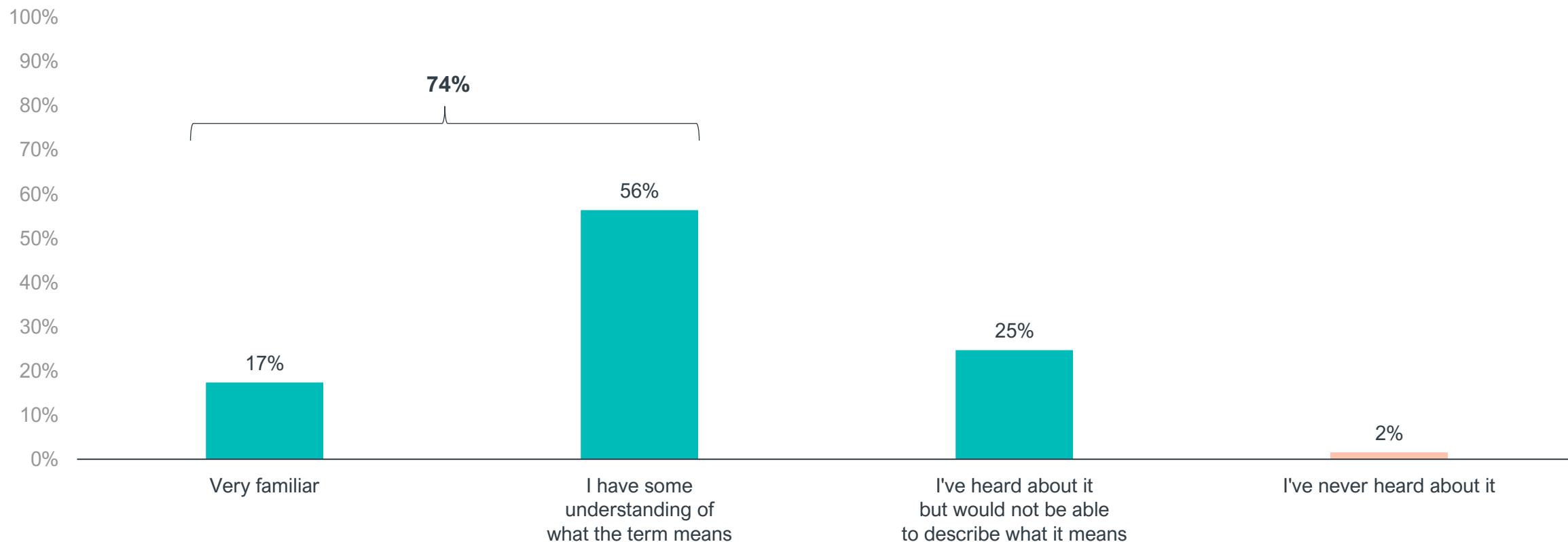
Q: How much time do you spend gardening during the gardening season (i.e. spring/summer/autumn)?, What are your top priorities when designing your garden? (possible to choose max 3 options), Which of these garden types is most attractive according to you?

~74% are familiar or have some understanding of what biodiversity means (similar understanding compared to the other markets)

Biodiversity awareness and perception 1/5



Awareness/familiarity with the term Biodiversity, % of lawn owners



Base: 503 IP

Q: How familiar are you with the term biodiversity?

83

“Different species of plants, animals and diversity” are most often mentioned when the garden owners describe biodiversity with their own words



What does the term biodiversity mean?

place respect environment
species kinds beings
designates varied wild
diversity insect spaces
elements environments fauna things
know organisms
preserve pesticide multitude
ecosystem flowers balance variety life set garden earth types products
several well together populate organic space present
respecting vegetable natural multiple vegetal leave
different live microorganisms many various idea
plants flora planet forms nature
insects

Base: 503 IP

Q: What does the term biodiversity mean?

84

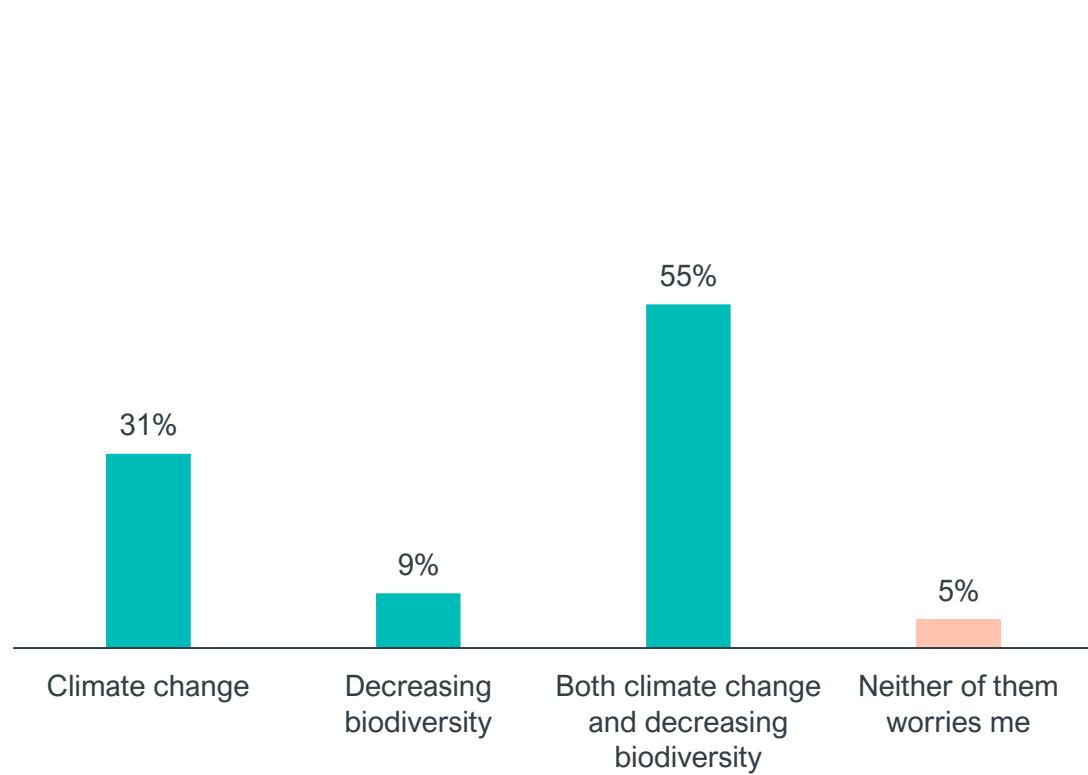
French are among the most worried about climate change and/or decreasing biodiversity and states that it is a shared responsibility

Biodiversity awareness and perception

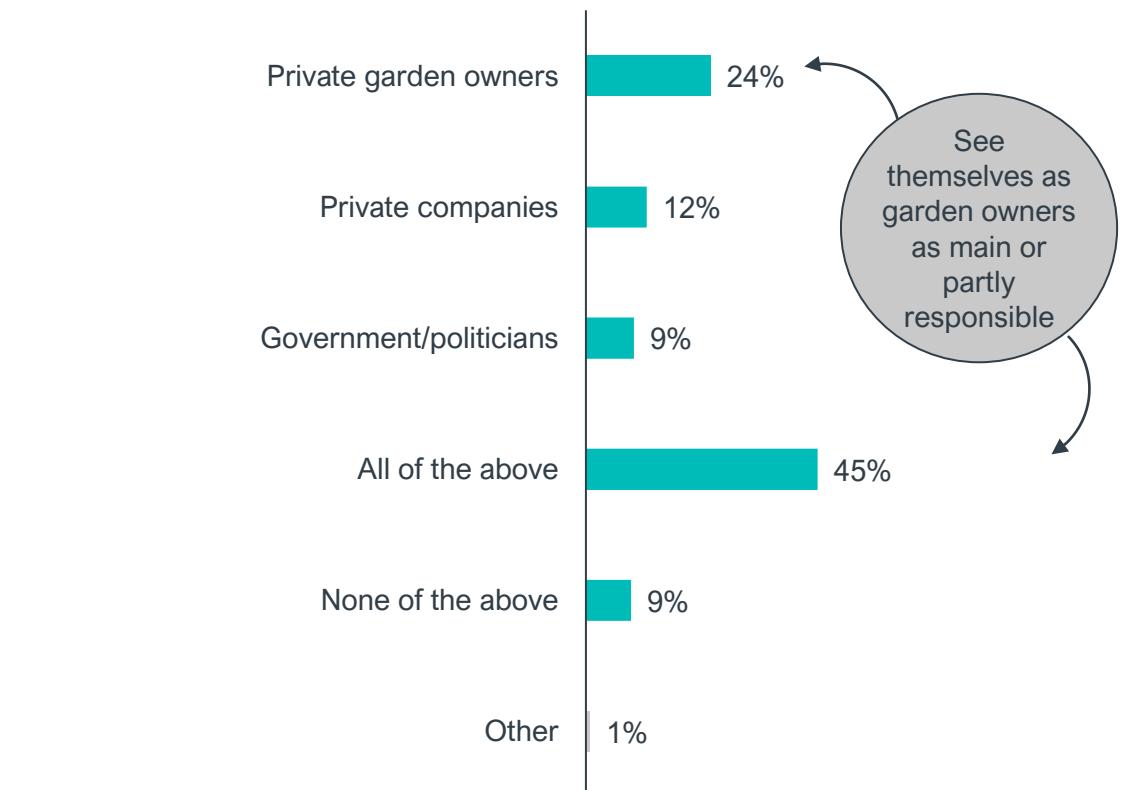
3/5



Sustainability issues that worries



Greatest responsibility in maintaining biodiversity



Base: 503 IP

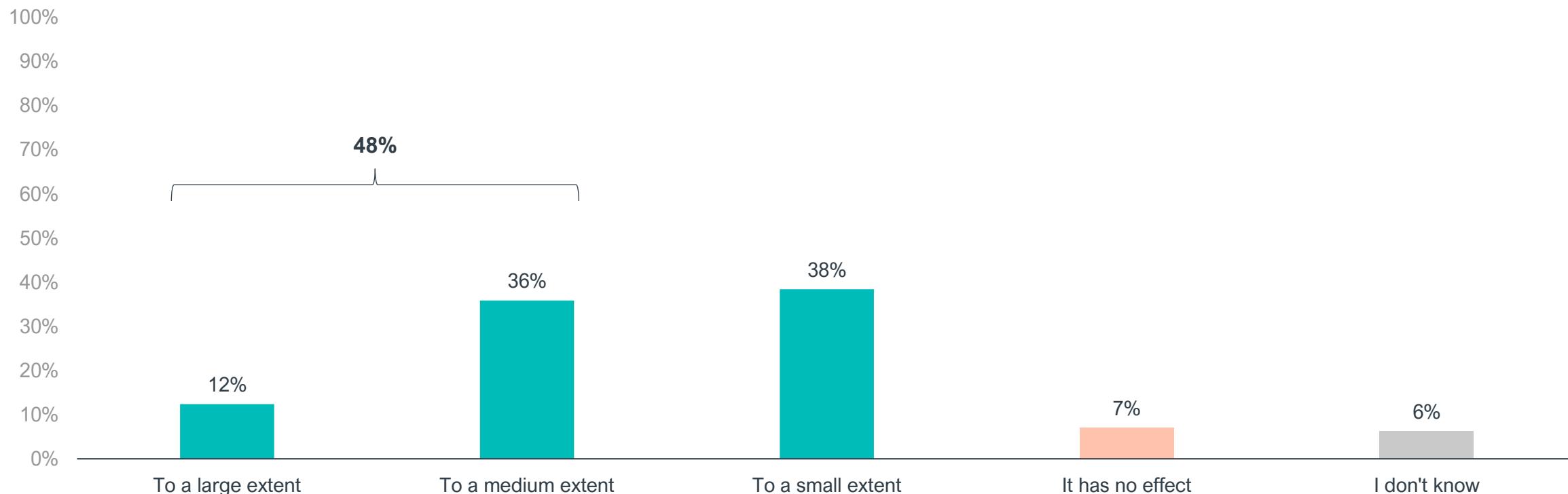
Q: Which of these sustainability issues worries you the most?, According to you, who carries the greatest responsibility in maintaining biodiversity?

~50% believe that their own garden can help boost the biodiversity to a medium or large extent

Biodiversity awareness and perception 4/5



The perception of what extent the own garden can help boost biodiversity



Base: 503 IP

Q: To what extent do you think that your own garden can help boost biodiversity?

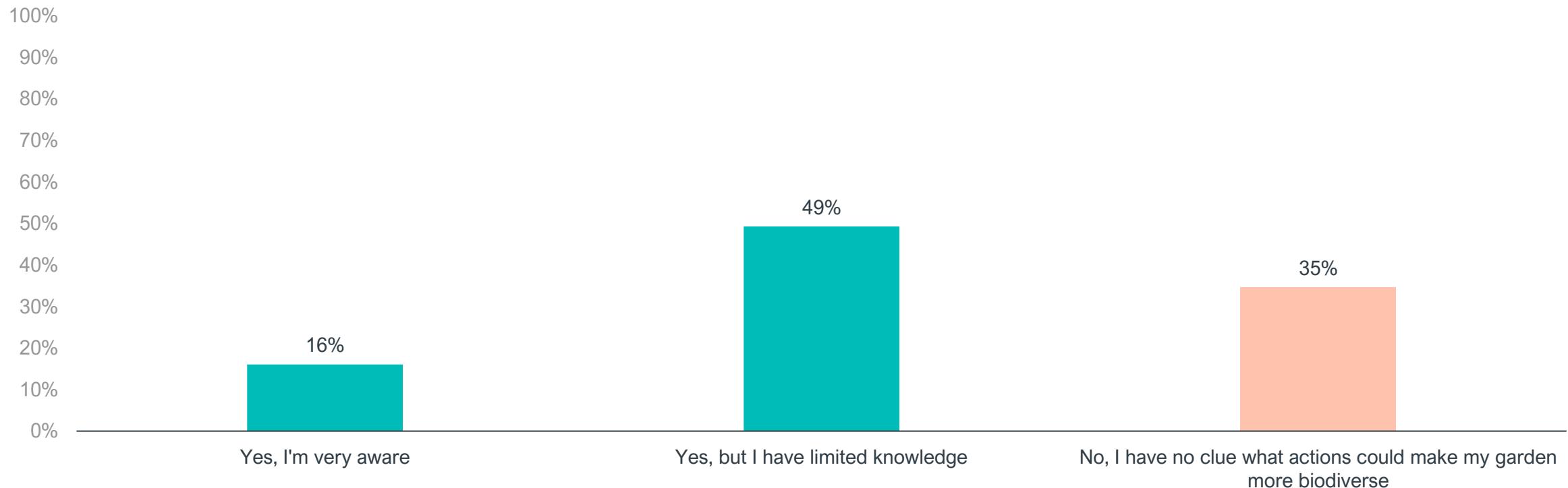
86

35% say that they don't have a clue of what actions that could make the own garden more biodiverse

Biodiversity awareness and perception 5/5



Awareness of actions to make own garden more biodiverse



Base: 503 IP

Q: Do you know what actions you can take to make your garden more biodiverse?

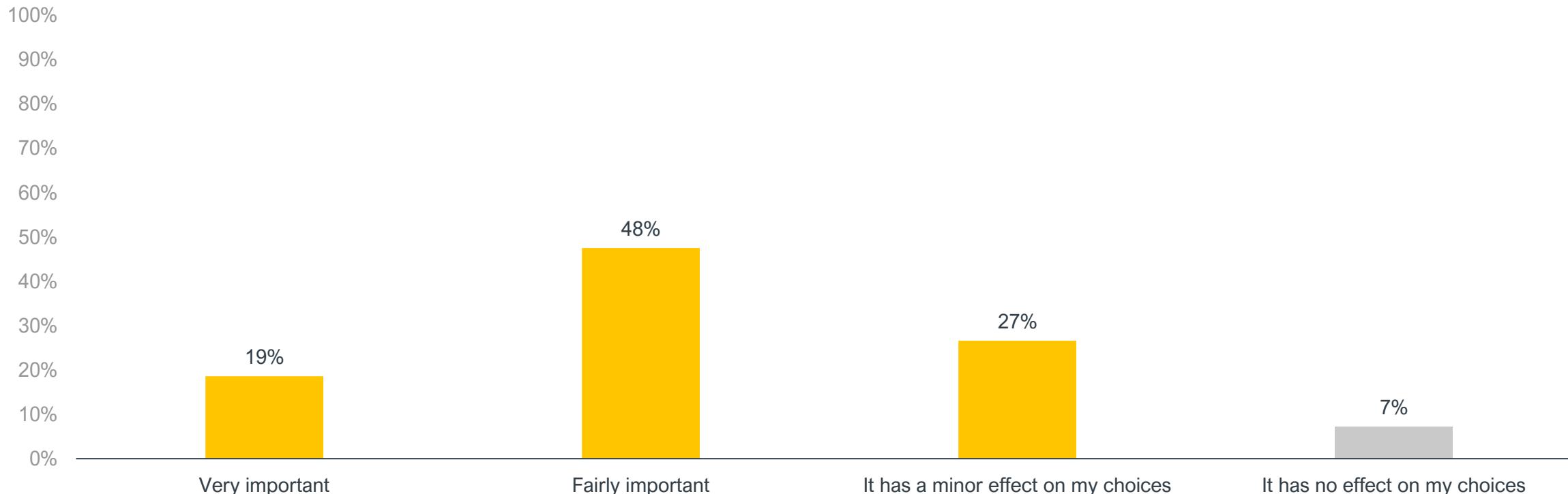
87

The most common perception (48%) is that biodiversity is fairly important when planning their garden projects

Biodiversity behaviour and maturity 1/5



Importance of biodiversity when planning garden projects



Base: 503 IP

Q: When you plan your garden projects, how important is biodiversity?

88

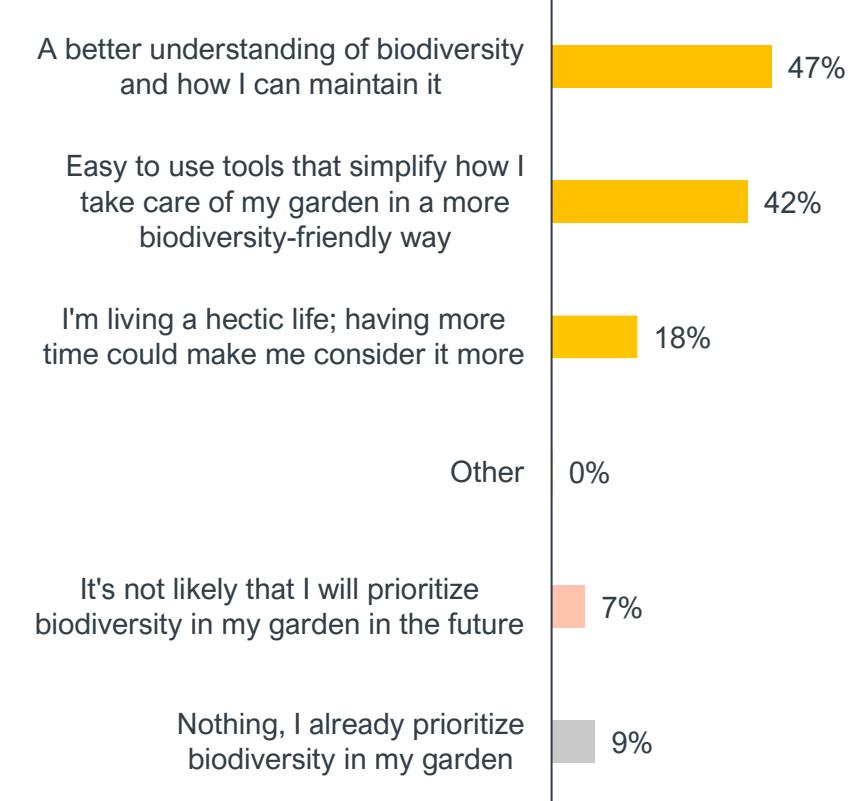
A better understanding of biodiversity and relevant actions to take would both reduce barriers and facilitate increased focus on biodiversity

Biodiversity behaviour and maturity 2/5

Barriers for making the garden more biodiverse



What would make consumers more likely to increase biodiversity in their garden



Base: Barriers – 169 IP, More likely to increase – 503 IP

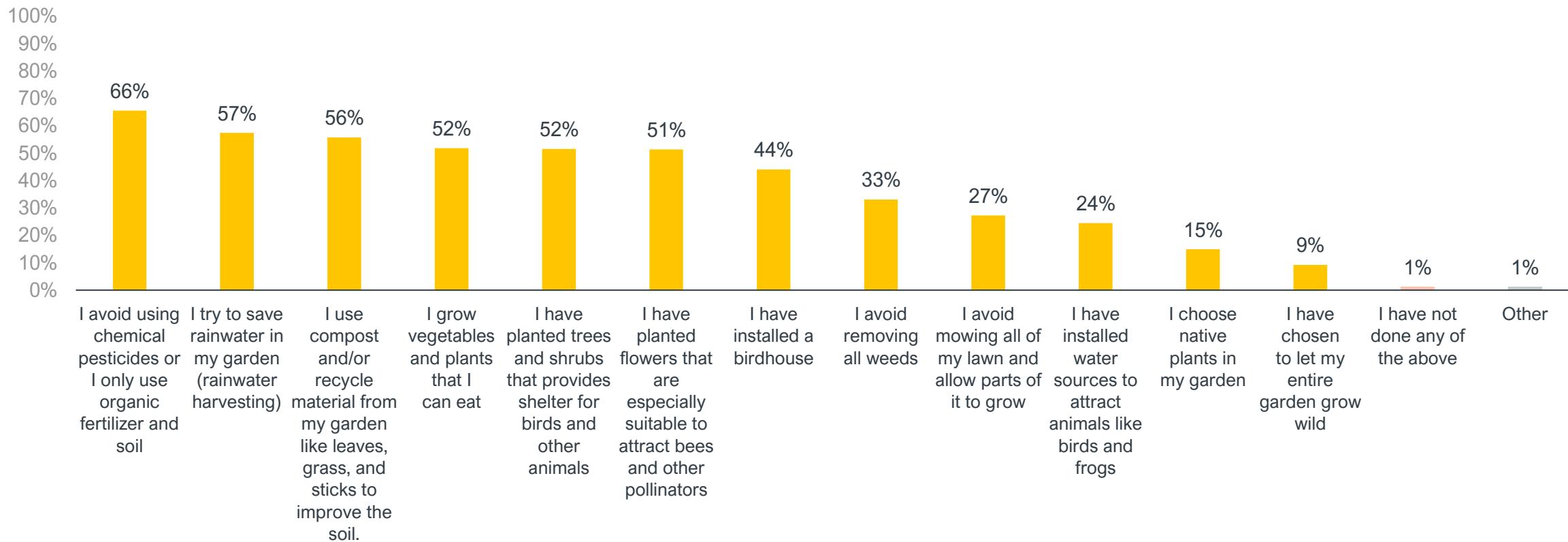
Q: What – if something – hinders you from making your garden more biodiverse? What would make you more likely to increase biodiversity in your garden?

Avoid usage of chemical pesticides is the most common action made followed by save of rain water and usage of compost and recycle material

Biodiversity behaviour and maturity 3/5



Which biodiversity actions taken in the own garden



Base: 329 IP

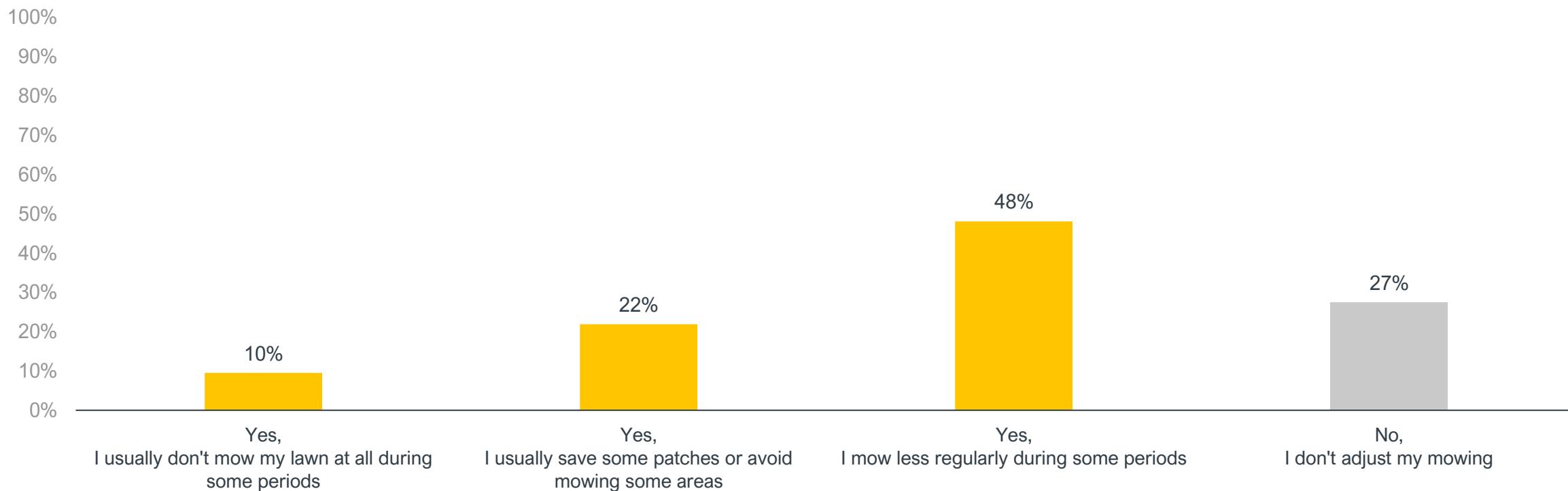
Q: Which of these actions have you taken to increase biodiversity in your garden?

~50% mow their lawn less regularly during some periods (with consideration to biodiversity), 30% don't adjust their mowing

Biodiversity behaviour and maturity 4/5



Share who considers biodiversity when moving their lawn



Base: 503 IP

Q: Do you consider biodiversity when mowing your lawn?

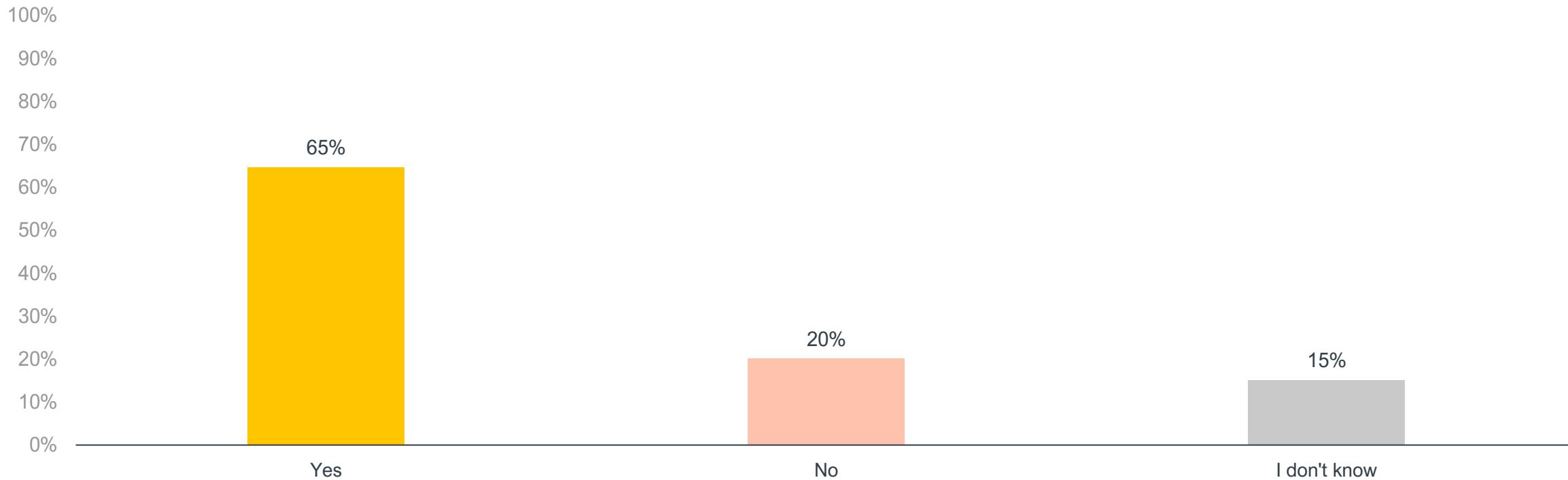
91

The majority (65%) would like to learn more about ways to let biodiversity thrive in their garden

Biodiversity behaviour and maturity 5/5



Would you like to learn more about ways to let biodiversity thrive in your garden?



Base: 503 IP

Q: Would you like to learn more about ways to let biodiversity thrive in your garden?

92

Summary: France



Overview potential market	<ul style="list-style-type: none">51% of the French population state that they own a garden with a lawn
Garden behaviour	<ul style="list-style-type: none">French people are more interested in that their garden provides them with food/eatable plants compared to other markets. 52% wants to have a well arranged and trimmed garden while 45% wants a mix
Biodiversity awareness and perception	<ul style="list-style-type: none">~74% are familiar or have some understanding of what biodiversity means (similar understanding compared to the other markets)“Different species of plants, animals and diversity” are most often mentioned when the garden owners describe biodiversity with their own wordsFrench are among the most worried about climate change and/or decreasing biodiversity and states that it is a shared responsibility~50% believe that their own garden can help boost the biodiversity to a medium or large extent35% say that they don’t have a clue of what actions that could make the own garden more biodiverse
Biodiversity behaviour and maturity	<ul style="list-style-type: none">The most common perception (48%) is that biodiversity is fairly important when planning their garden projectsA better understanding of biodiversity and relevant actions to take would both reduce barriers and facilitate increased focus on biodiversityAvoid usage of chemical pesticides is the most common action made followed by save of rain water and usage of compost and recycle material~50% mow their lawn less regularly during some periods (with consideration to biodiversity), 30% don’t adjust their mowingThe majority (65%) would like to learn more about ways to let biodiversity thrive in their garden

Agenda

- Introduction to project
- Executive summary and recommendations
- **Biodiversity awareness and behaviour**
 - Across markets
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 - **Netherlands - *slide 94***
 - Belgium - *slide 108*
 - Poland - *slide 122*

45% of the Dutch population state that they own a garden with a lawn

Overview potential market 1/1



Share of population owning a garden with a lawn



Base: 1145 IP

Q: Which of the following statements are correct when describing your home? (I own a garden with a lawn)

95

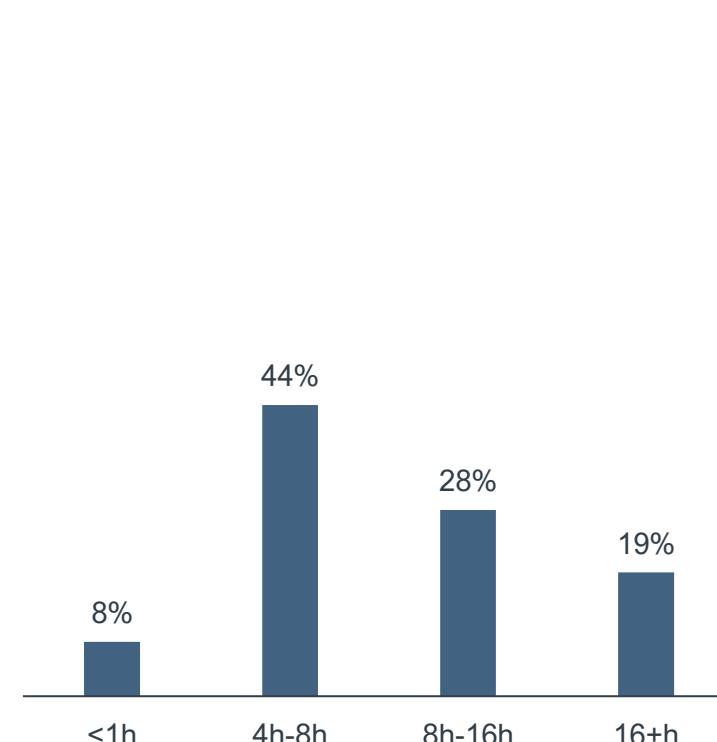
For the Dutch it is more important that their garden looks pretty compared to other markets. ~50% want a mix of a wild and arranged garden

Garden behaviour

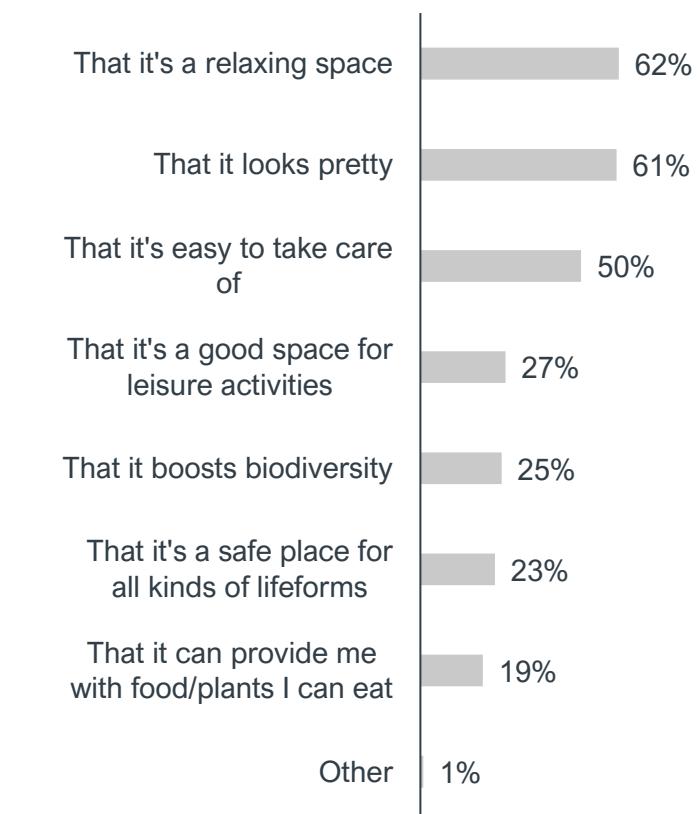
1/1



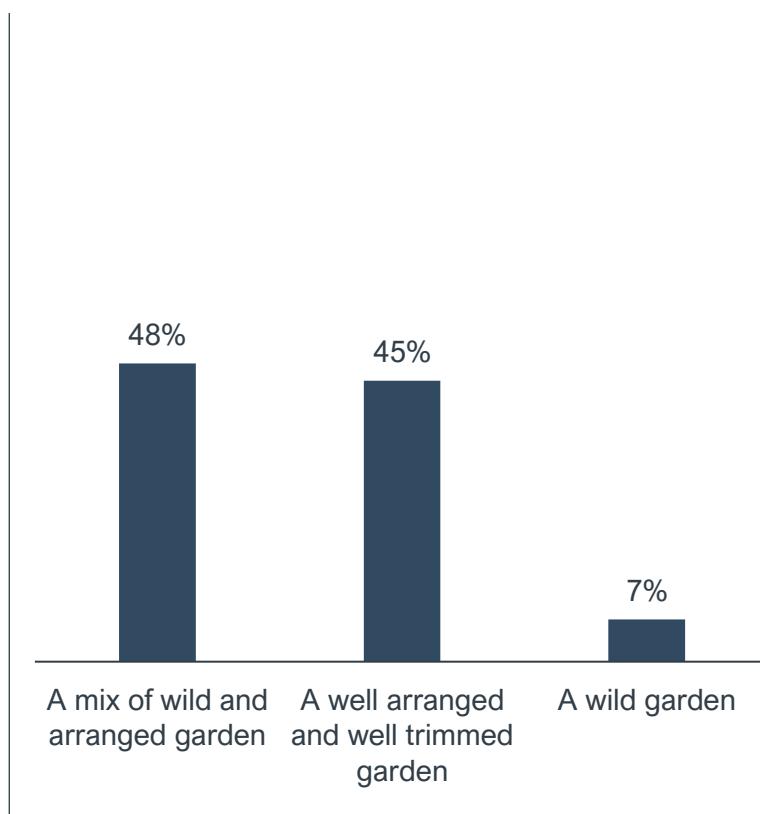
Time spend gardening during season



Top priorities when designing garden



Most attractive garden types



Base: 502 IP

Q: How much time do you spend gardening during the gardening season (i.e. spring/summer/autumn)?, What are your top priorities when designing your garden? (possible to choose max 3 options), Which of these garden types is most attractive according to you?

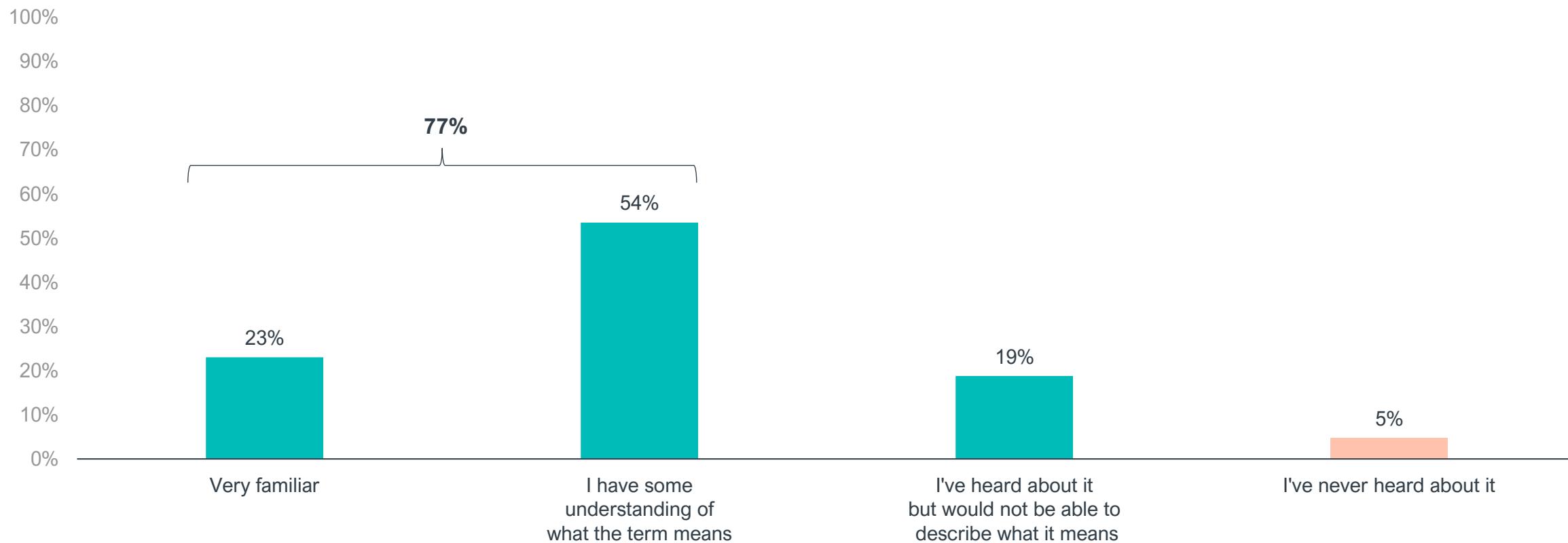
Nepa

~80% are familiar or have some understanding of what biodiversity means while 5% have never heard about it

Biodiversity awareness and perception 1/5



Awareness/familiarity with the term Biodiversity, % of lawn owners



Base: 502 IP

Q: How familiar are you with the term biodiversity?

97

“Different types of plants and animals” are most often mentioned when the garden owners describe biodiversity with their own words



What does the term biodiversity mean?

different
species
garden
diversity
life forms
kinds
environment
everything
live
idea
various
types
plants
animals
insects
many
variety
plant
flowers
wide
multiple
mix
present
things
birds
fauna
variation
good
area
lots
earth
together
shrub
butterflies
place
flora
cities
natural
green
the
land
attract
organisms
nature
living
bees
possible
attract
organisms

Base: 502 IP

Q: What does the term biodiversity mean?

98

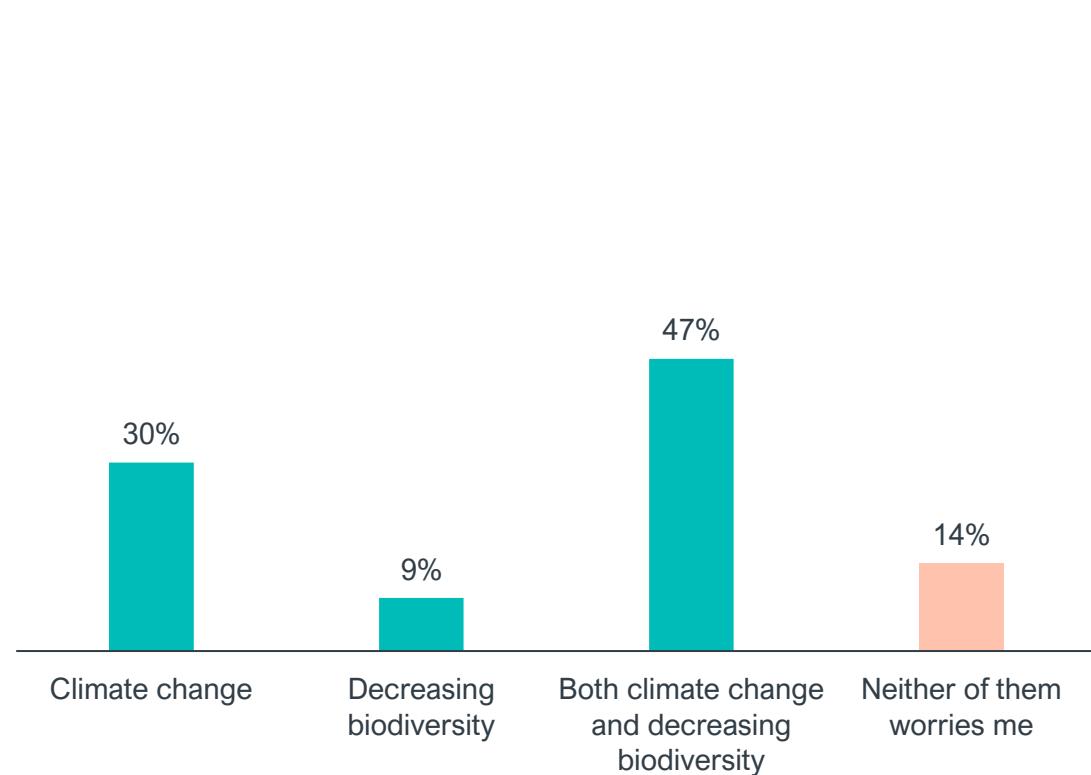
In the Netherlands, it is most common to be worried about both climate change and decreasing biodiversity, joint responsibility is stated

Biodiversity awareness and perception

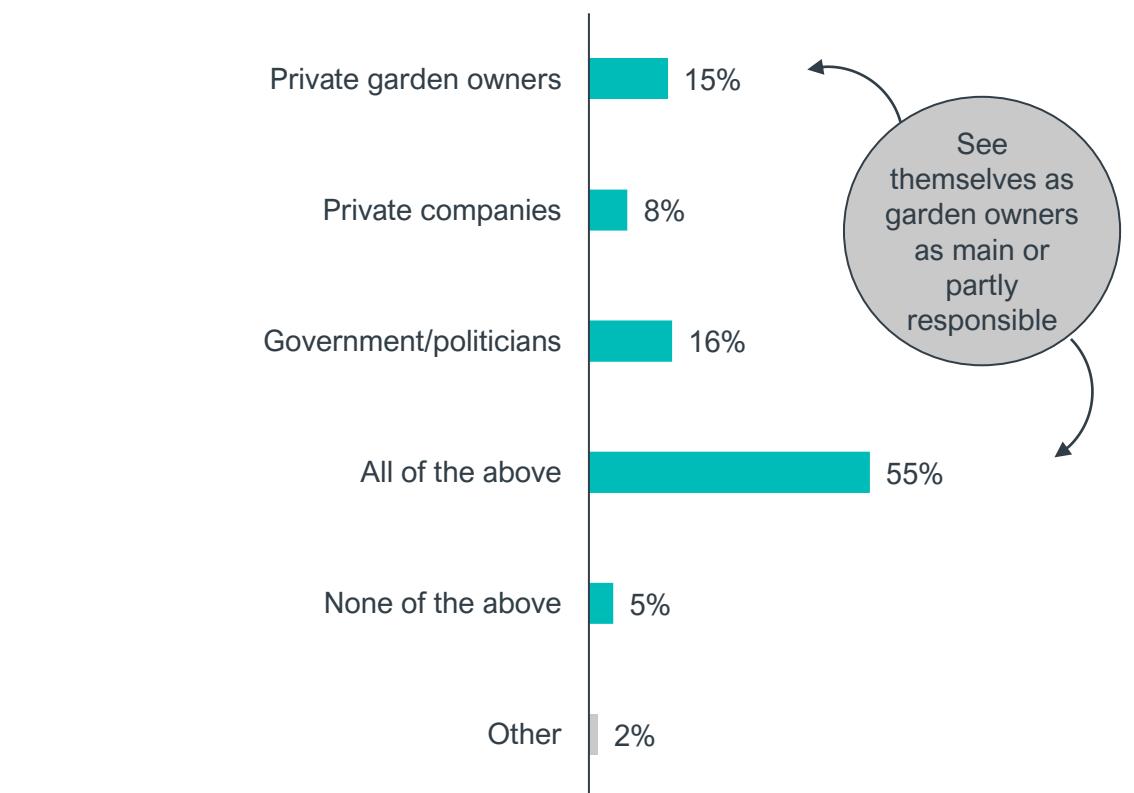
3/5



Sustainability issues that worries



Greatest responsibility in maintaining biodiversity



Base: 502 IP

Q: Which of these sustainability issues worries you the most?, According to you, who carries the greatest responsibility in maintaining biodiversity?

99

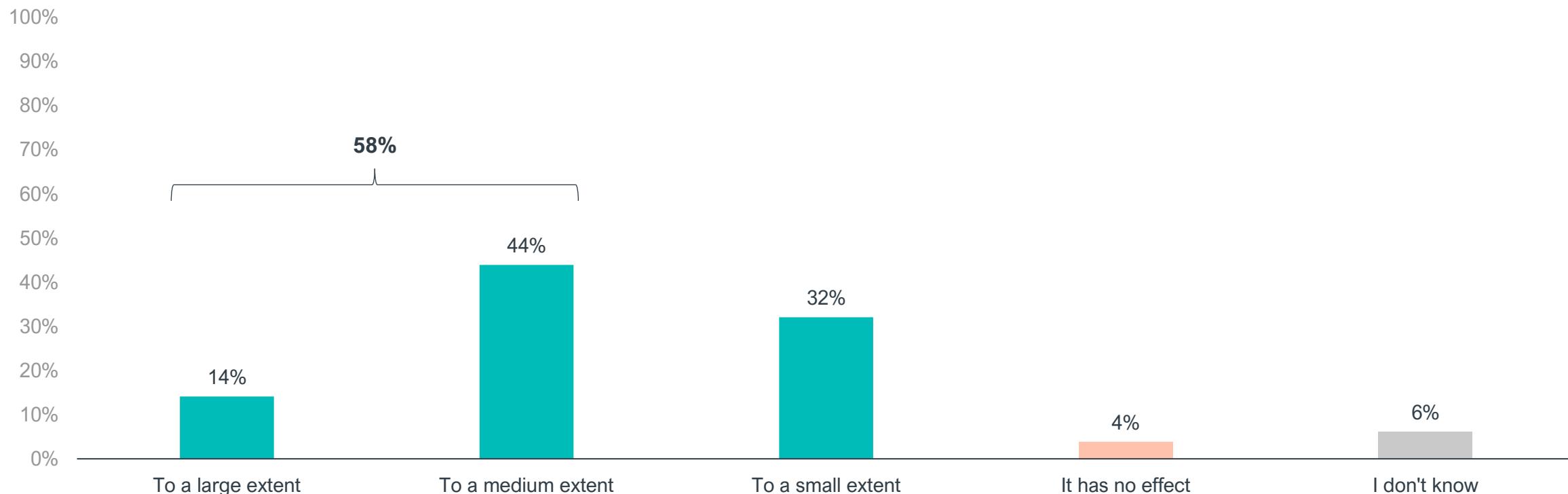
Nepa

~60% believe that their own garden can help boost the biodiversity to a medium or large extent

Biodiversity awareness and perception 4/5



The perception of what extent the own garden can help boost biodiversity



Base: 502 IP

Q: To what extent do you think that your own garden can help boost biodiversity?

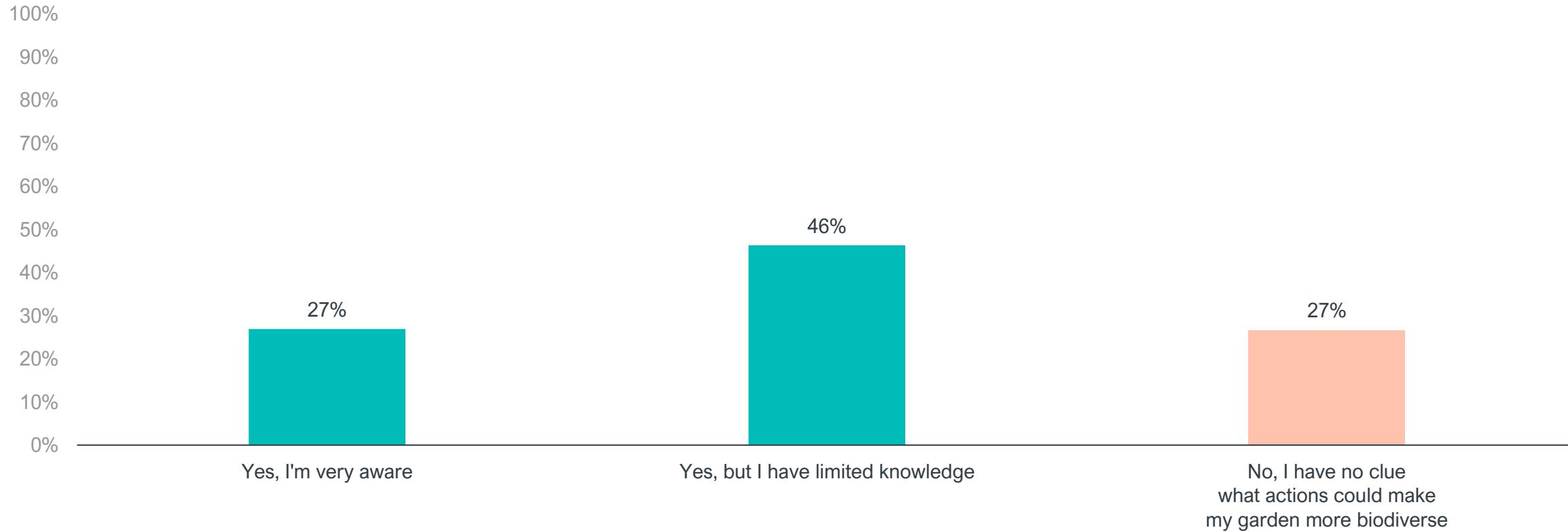
100

Nepa

One third say that they don't are aware of any actions that could make their garden more biodiverse



Awareness of actions to make own garden more biodiverse



Base: 502 IP

Q: Do you know what actions you can take to make your garden more biodiverse?

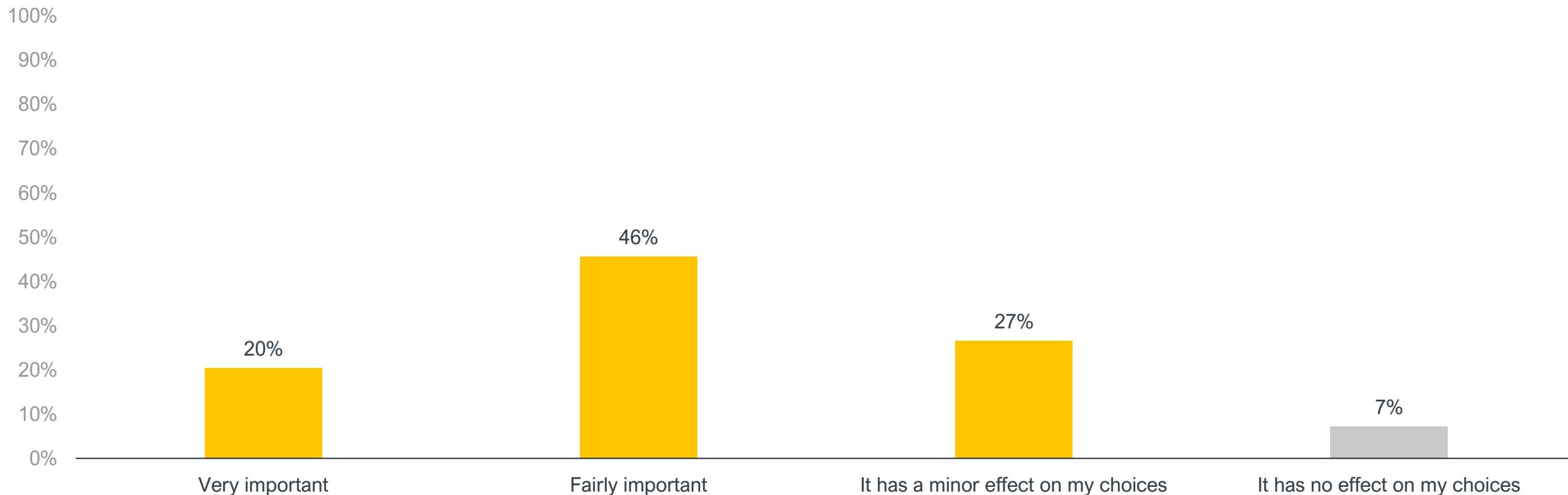
101

The most common perception (46%) is that biodiversity is fairly important when planning their garden projects

Biodiversity behaviour and maturity 1/5



Importance of biodiversity when planning garden projects



Base: 502 IP

Q: When you plan your garden projects, how important is biodiversity?

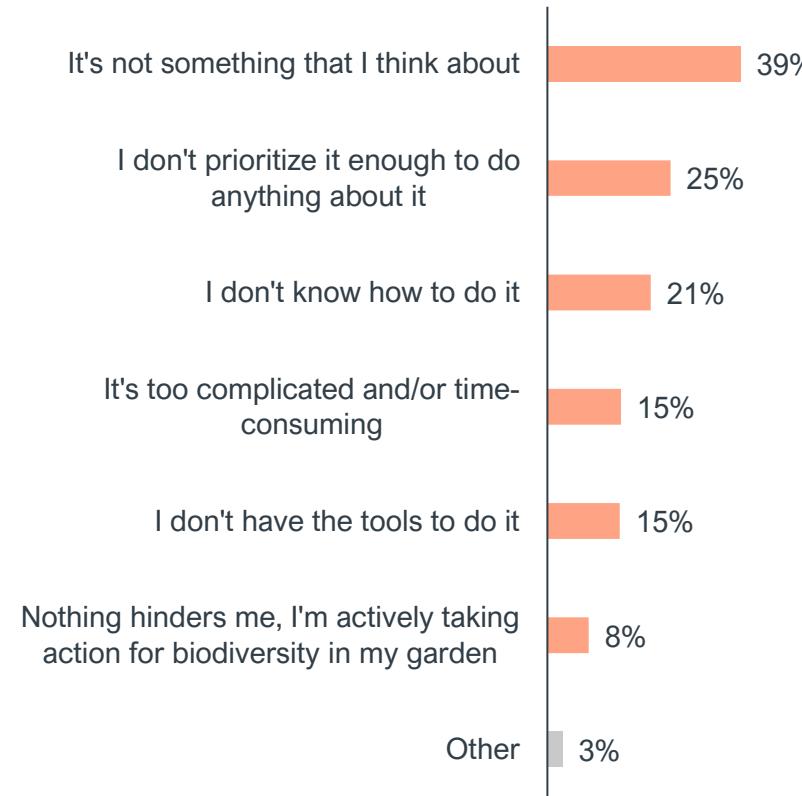
102

The main barrier is that people just don't think about biodiversity when gardening. "Easy to use tools" would make the Dutch increase biodiversity

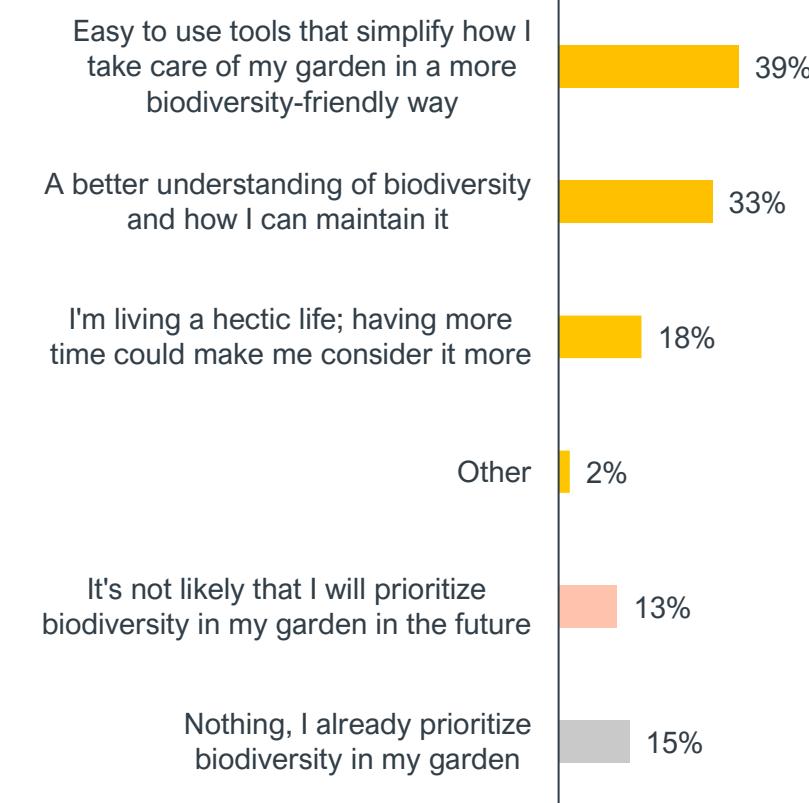
Biodiversity behaviour and maturity 2/5



Barriers for making the garden more biodiverse



What would make consumers more likely to increase biodiversity in their garden



Base: Barriers – 172 IP, More likely to increase – 502 IP

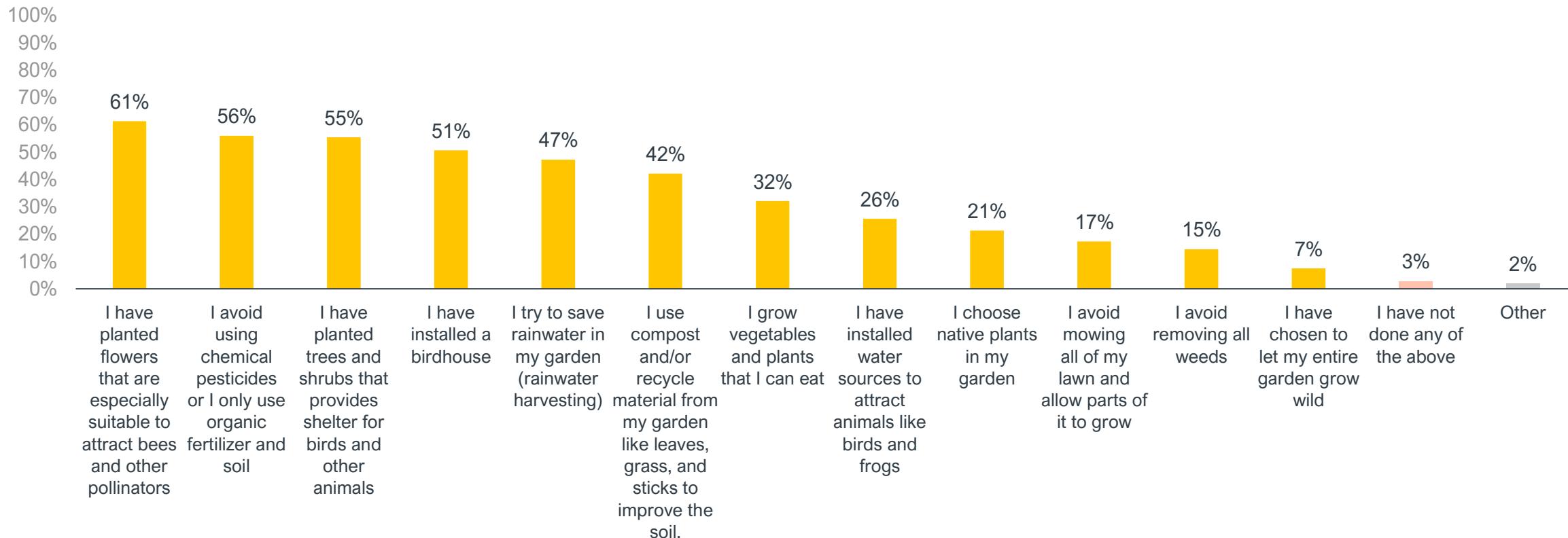
Q: What – if something – hinders you from making your garden more biodiverse? What would make you more likely to increase biodiversity in your garden?

Planting flowers that attract bees/other pollinators is the most common action made – relatively few (~20%) avoid mowing all of their lawn

Biodiversity behaviour and maturity 3/5



Which biodiversity actions taken in the own garden



Base: 363 IP

Q: Which of these actions have you taken to increase biodiversity in your garden?

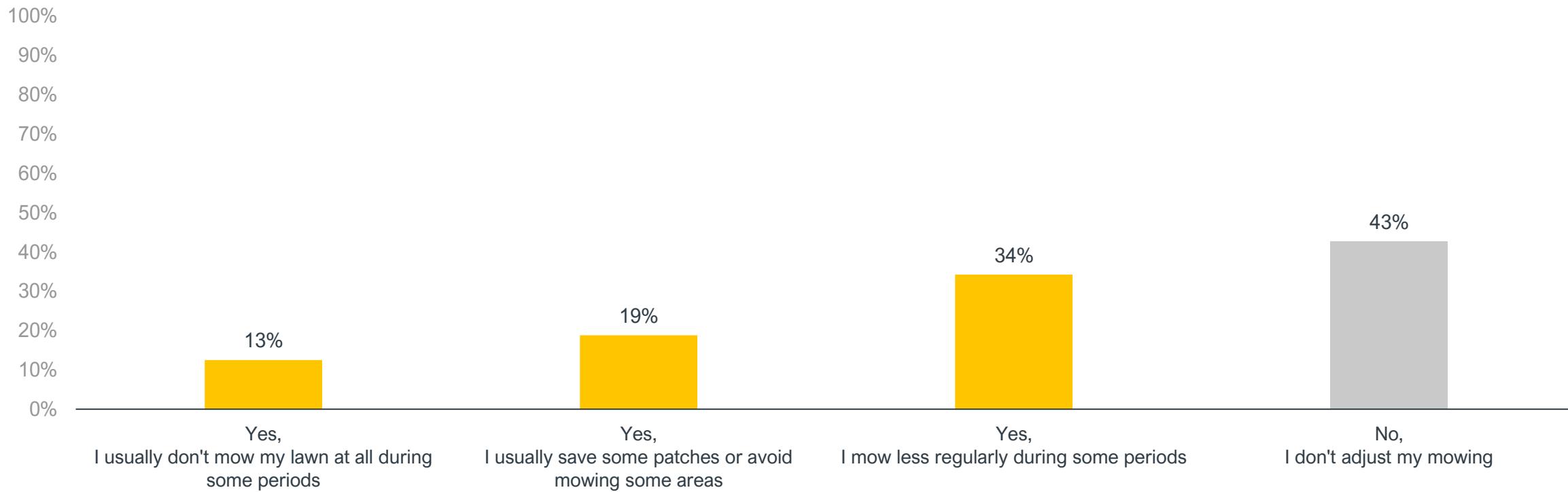
104

~45% states that they don't consider biodiversity when mowing their lawn (they do no adjustments)

Biodiversity behaviour and maturity 4/5



Share who considers biodiversity when moving their lawn



Base: 502 IP

Q: Do you consider biodiversity when mowing your lawn?

105

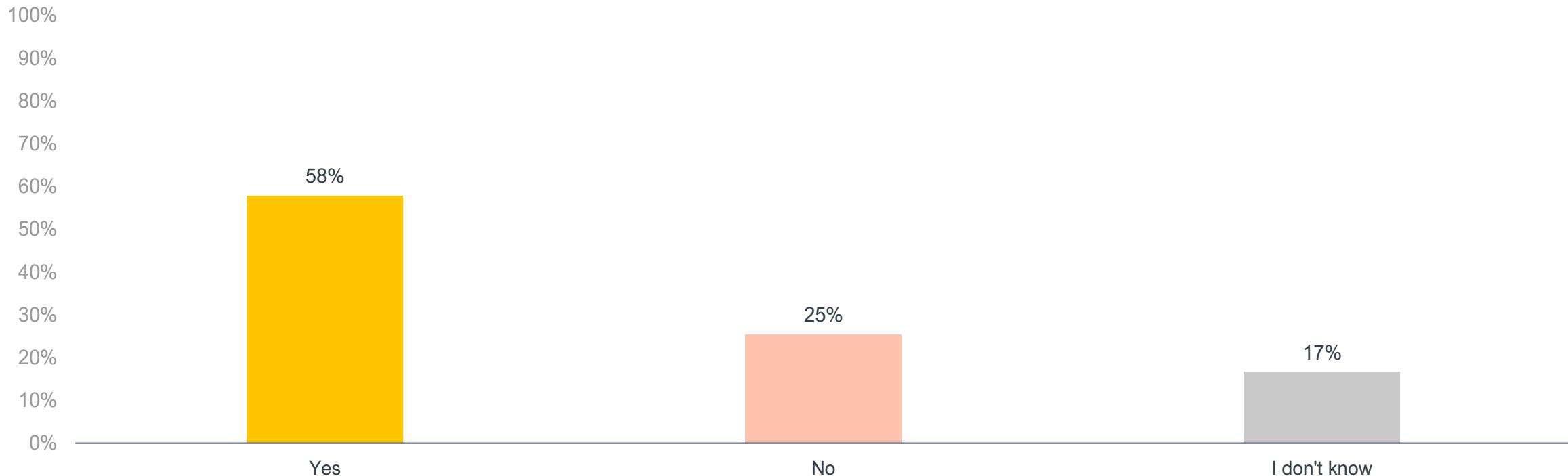
Nepa

The majority (~60%) would like to learn more about ways to let biodiversity thrive in their garden

Biodiversity behaviour and maturity 5/5



Would you like to learn more about ways to let biodiversity thrive in your garden?



Base: 502 IP

Q: Would you like to learn more about ways to let biodiversity thrive in your garden?

106

Nepa

Summary: Netherlands



Overview potential market	<ul style="list-style-type: none">45% of the Dutch population state that they own a garden with a lawn
Garden behaviour	<ul style="list-style-type: none">For the Dutch it is more important that their garden looks pretty compared to other markets. ~50% want a mix of a wild and arranged garden
Biodiversity awareness and perception	<ul style="list-style-type: none">~80% are familiar or have some understanding of what biodiversity means while 5% have never heard about it“Different types of plants and animals” are most often mentioned when the garden owners describe biodiversity with their own wordsIn the Netherlands, it is most common to be worried about both climate change and decreasing biodiversity, joint responsibility is stated~60% believe that their own garden can help boost the biodiversity to a medium or large extentOne third say that they don't are aware of any actions that could make their garden more biodiverse
Biodiversity behaviour and maturity	<ul style="list-style-type: none">The most common perception (46%) is that biodiversity is fairly important when planning their garden projectsThe main barrier is that people just don't think about biodiversity when gardening. "Easy to use tools" would make the Dutch increase biodiversityPlanting flowers that attract bees/other pollinators is the most common action made – relatively few (~20%) avoid mowing all of their lawn~45% states that they don't consider biodiversity when mowing their lawn (they do no adjustments)The majority (~60%) would like to learn more about ways to let biodiversity thrive in their garden

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 - Netherlands - *slide 94*
 - **Belgium - *slide 108***
 - Poland - *slide 122*

65% of the Belgian population state that they own a garden with a lawn

Overview potential market 1/1



Share of population owning a garden with a lawn



Base: 777 IP

Q: Which of the following statements are correct when describing your home? (I own a garden with a lawn)

109

Nepa

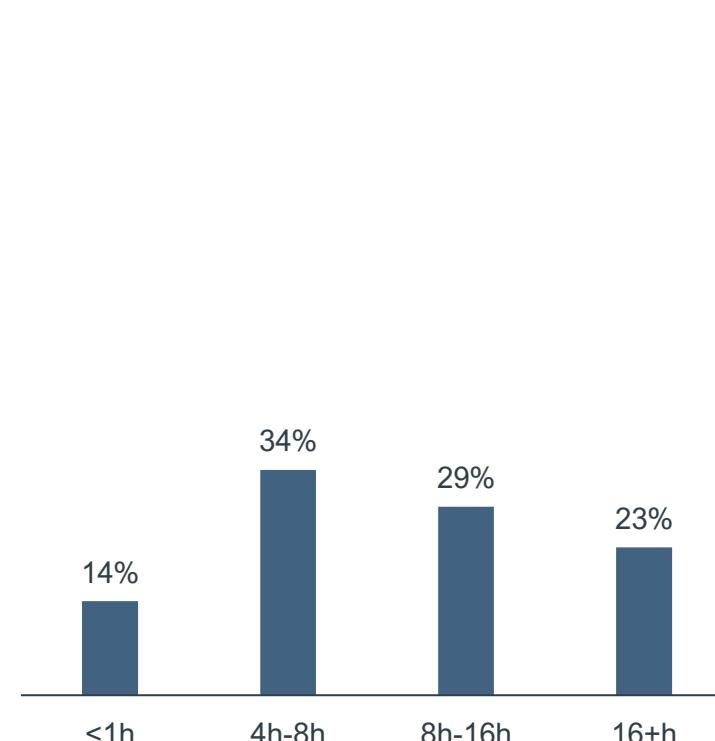
For Belgians it's attractive with a well-arranged garden that should be a relaxing space, it's most common to spend 4h-8h per week on gardening

Garden behaviour

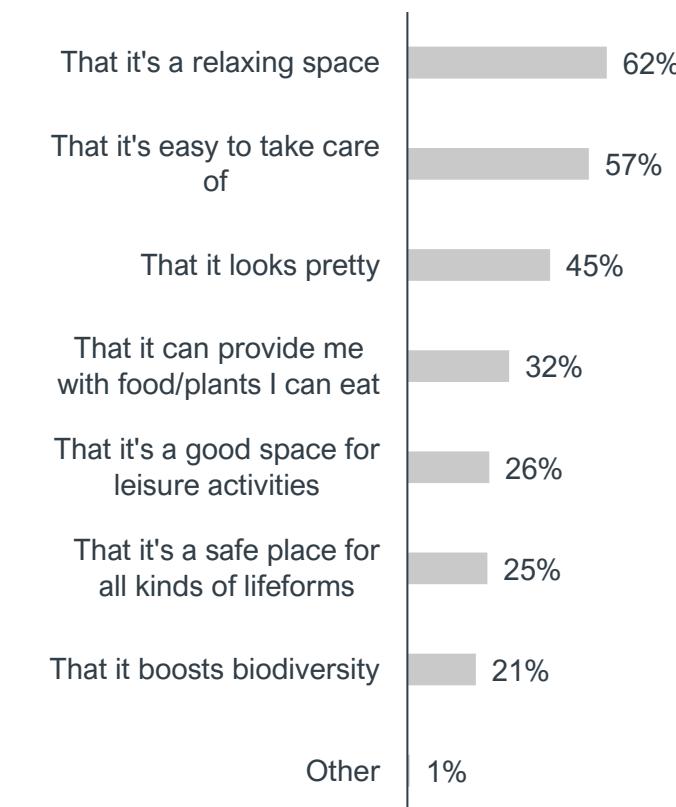
1/1



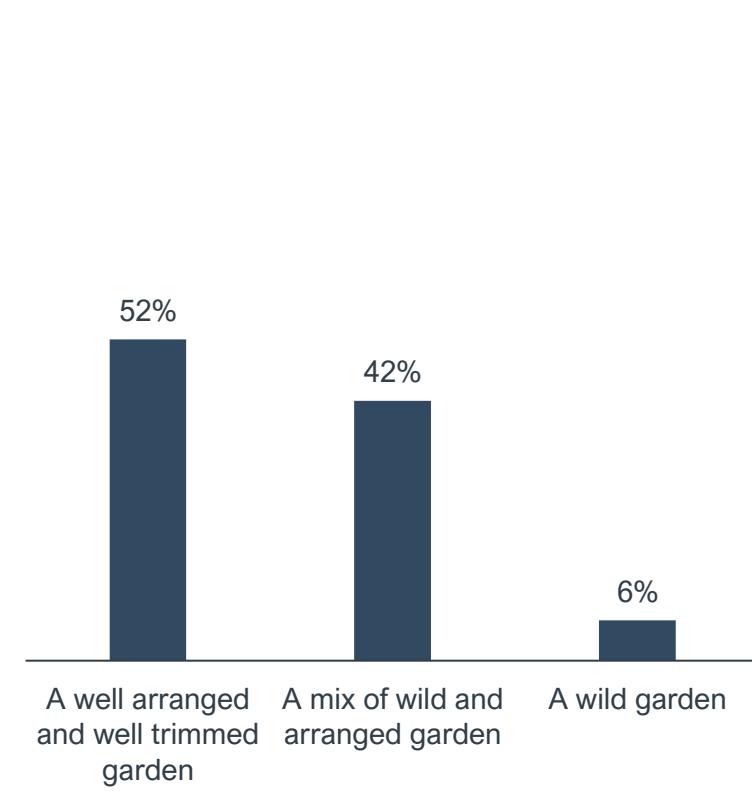
Time spend gardening during season



Top priorities when designing garden



Most attractive garden types



Base: 502 IP

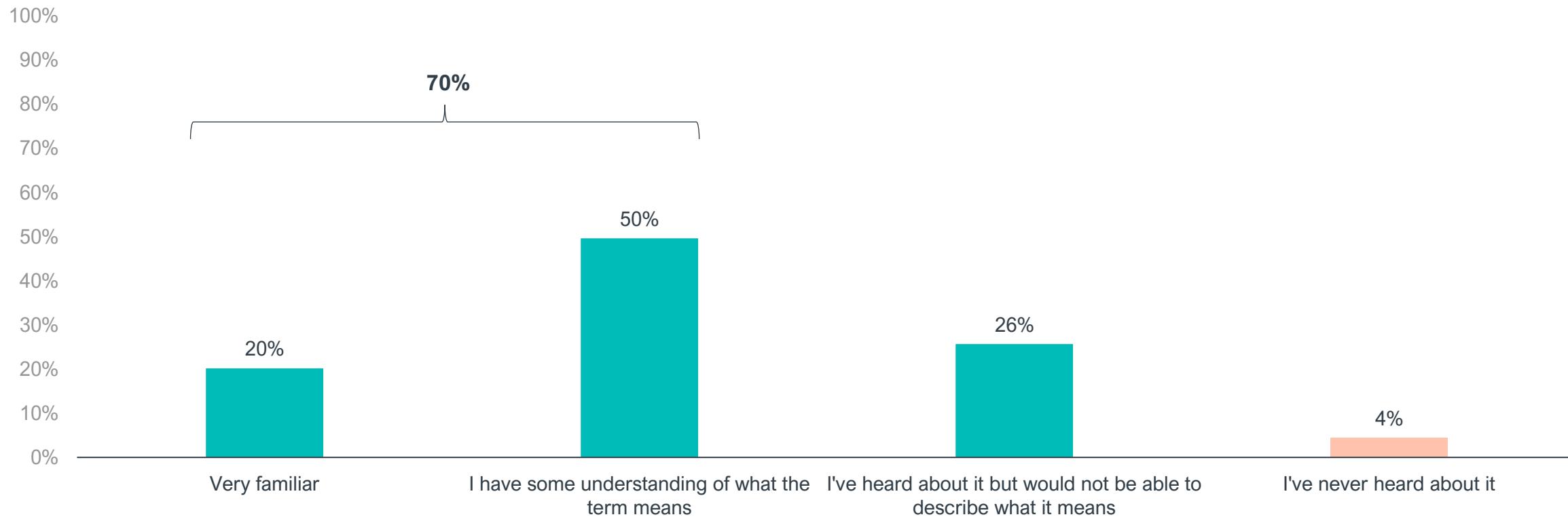
Q: How much time do you spend gardening during the gardening season (i.e. spring/summer/autumn)?, What are your top priorities when designing your garden? (possible to choose max 3 options), Which of these garden types is most attractive according to you?

Nepa

Half of the study population have some understanding of what the term means while 20% are very familiar with the term



Awareness/familiarity with the term Biodiversity, % of lawn owners



Base: 502 IP

Q: How familiar are you with the term biodiversity?

111

“Different species of plants and animals” are most often mentioned when respondents are asked to describe the term in their own words



What does the term biodiversity mean?

several kinds
harmony wild
grow insect
space area products together
mix things
nature plant types
organisms organic
species mixture make environment
fauna beings earth ecosystem good respect
plants vegetable biological attract
various flora live birds idea
present trees bees variety
place forms different life
living diversity insects
garden

Base: 502 IP

Q: What does the term biodiversity mean?

112

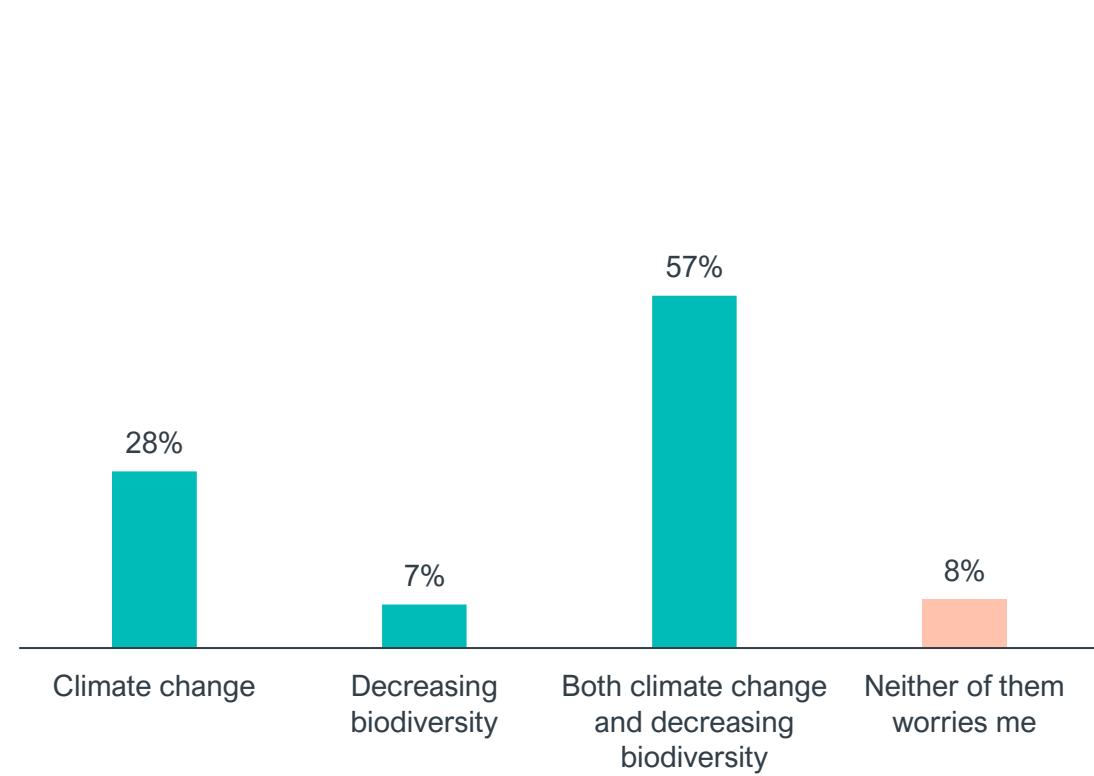
The majority are equally concerned about climate change and decreasing biodiversity and states that it is a shared responsibility

Biodiversity awareness and perception

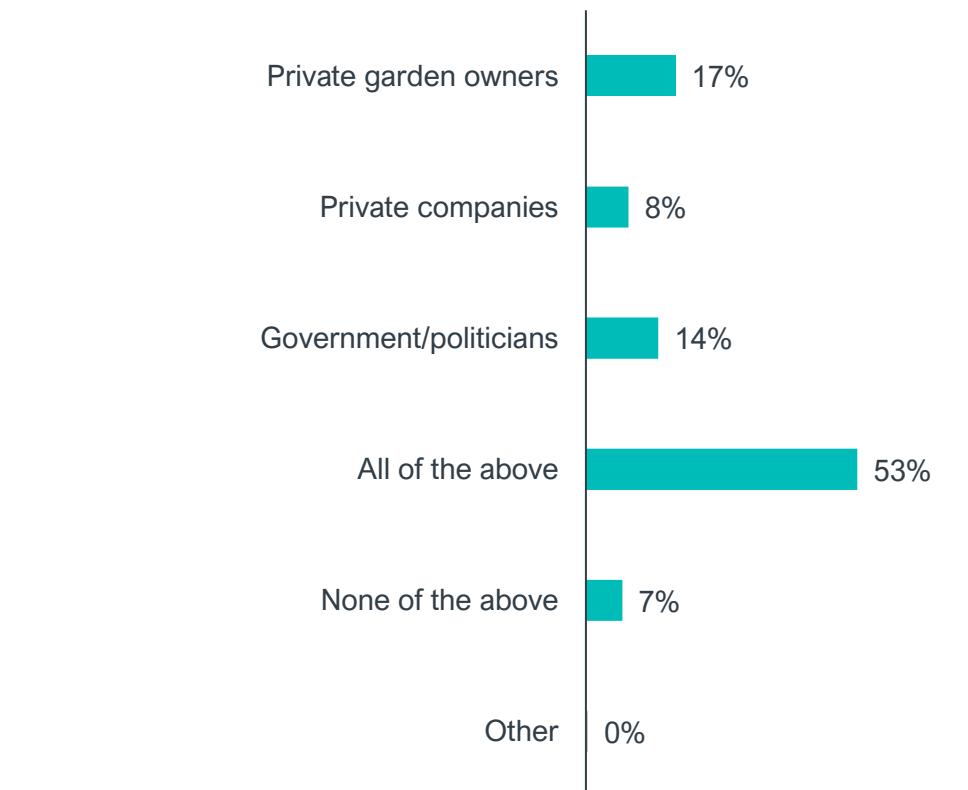
3/5



Sustainability issues that worries



Greatest responsibility in maintaining biodiversity



Base: 502 IP

Q: Which of these sustainability issues worries you the most?, According to you, who carries the greatest responsibility in maintaining biodiversity?

113

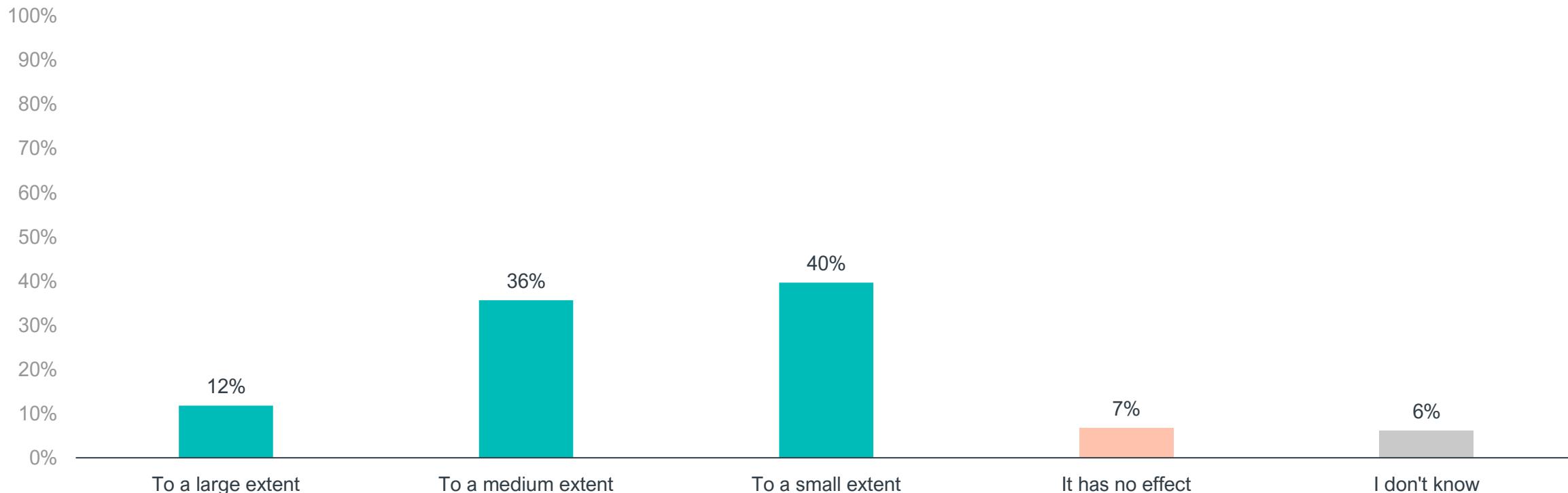
Nepa

Most people (40%) think that their own garden only contributes to a small extent to increasing biodiversity

Biodiversity awareness and perception 4/5



The perception of what extent the own garden can help boost biodiversity



Base: 502 IP

Q: To what extent do you think that your own garden can help boost biodiversity?

114

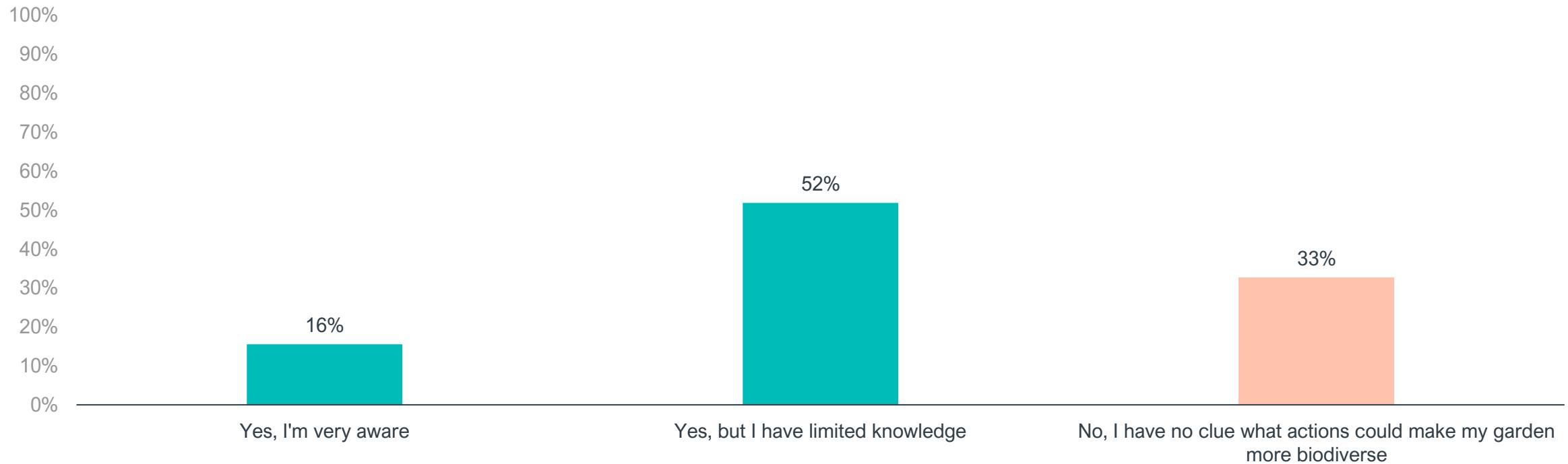
One third of the population have no clue how to act in order to make the garden more biodiverse

Biodiversity awareness and perception

5/5



Awareness of actions to make own garden more biodiverse



Base: 502 IP

Q: Do you know what actions you can take to make your garden more biodiverse?

115

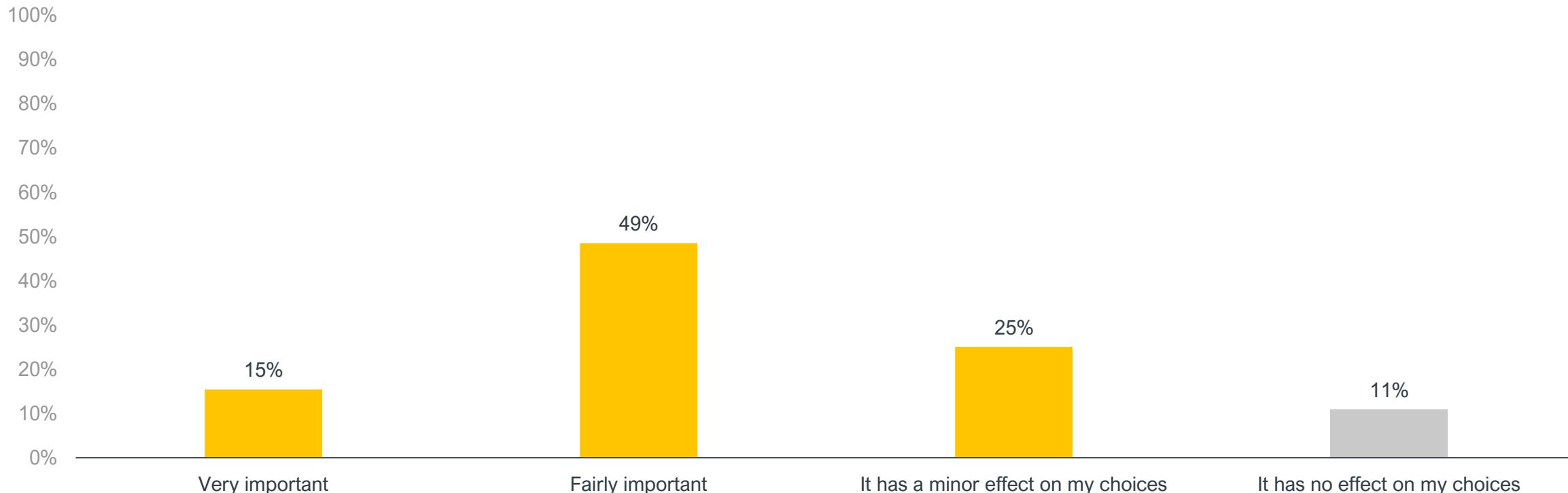
Nepa

The most common perception (49%) is that biodiversity is fairly important when planning their garden projects

Biodiversity behaviour and maturity 1/5



Importance of biodiversity when planning garden projects



Base: 502 IP

Q: When you plan your garden projects, how important is biodiversity?

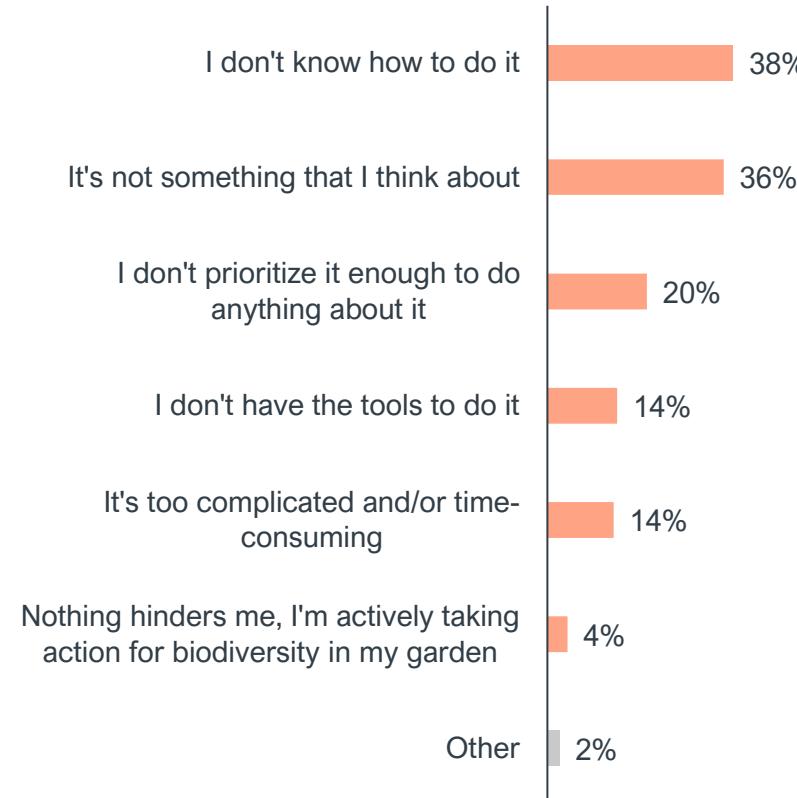
116

The main barrier is lack of knowledge; a better understanding would increase the likelihood of action being taken

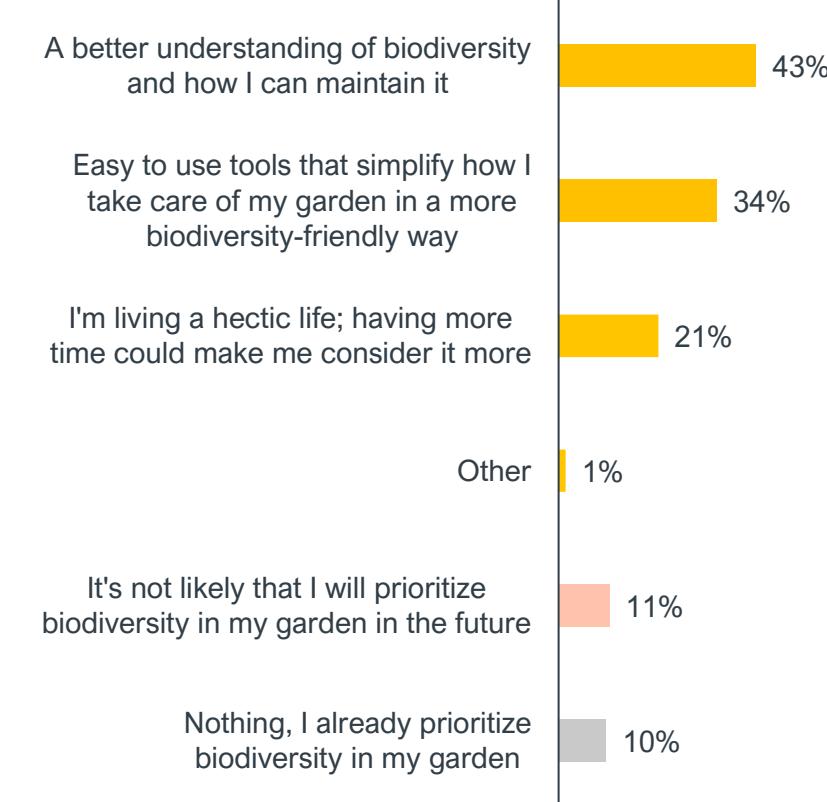
Biodiversity behaviour and maturity

2/5

Barriers for making the garden more biodiverse



What would make consumers more likely to increase biodiversity in their garden



Base: Barriers – 180 IP, More likely to increase – 502 IP

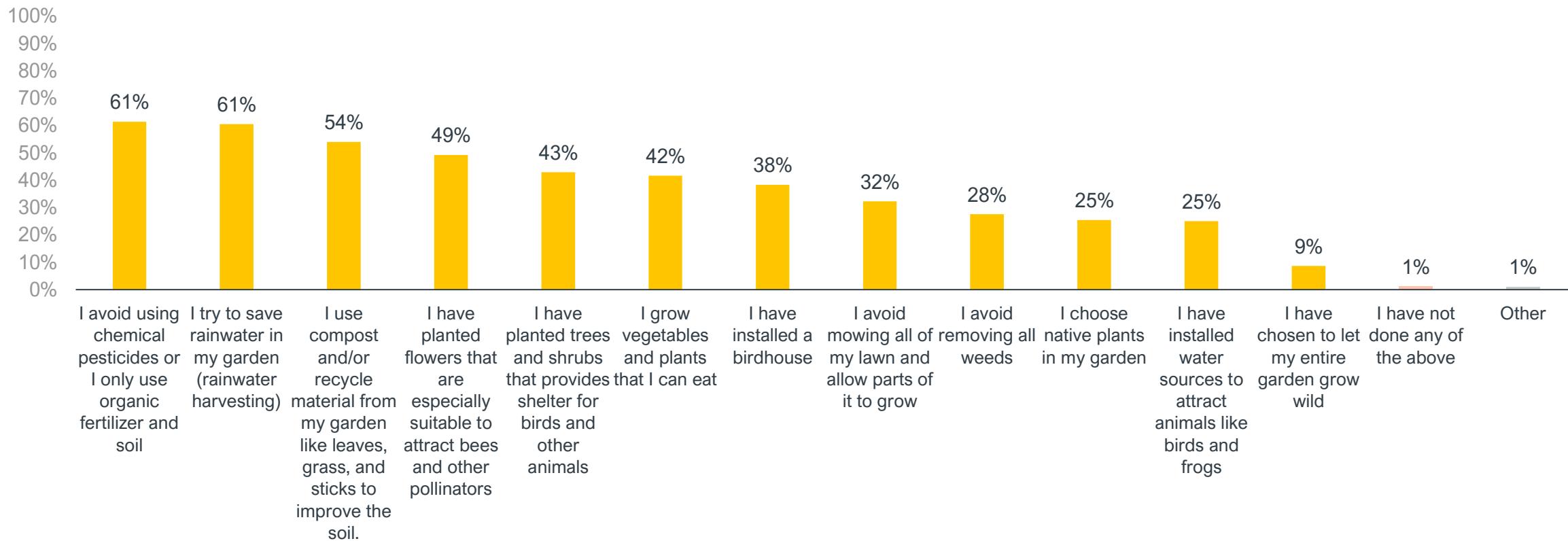
Q: What – if something – hinders you from making your garden more biodiverse? What would make you more likely to increase biodiversity in your garden?

In Belgium, the most common action is to avoid using chemical pesticides and rainwater harvesting

Biodiversity behaviour and maturity 3/5



Which biodiversity actions taken in the own garden



Base: 338 IP

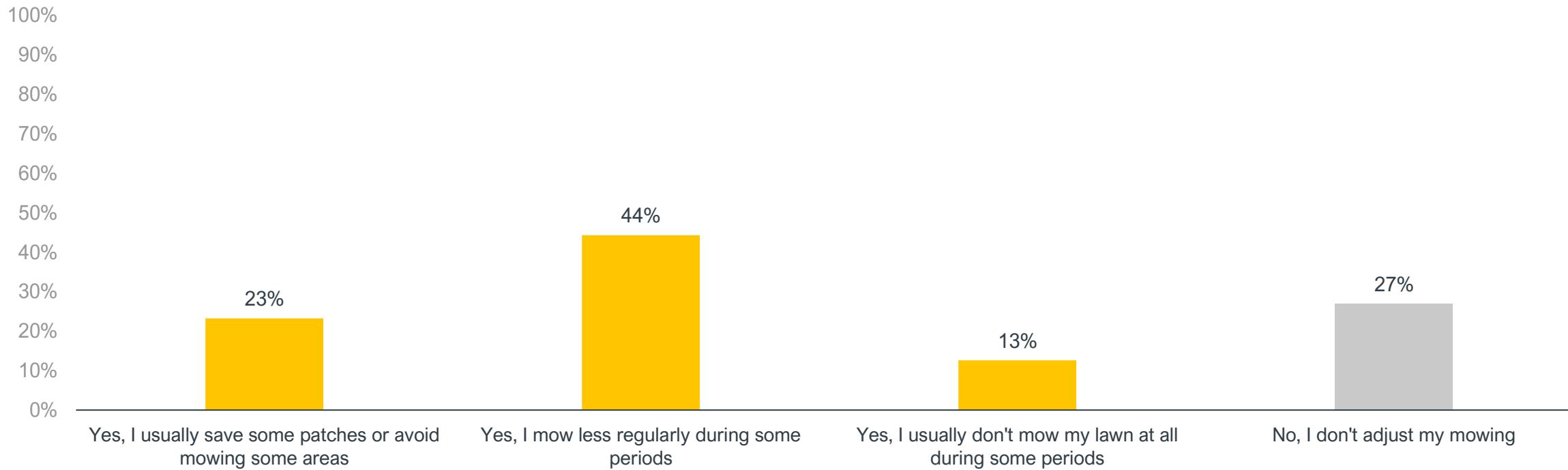
Q: Which of these actions have you taken to increase biodiversity in your garden?

Mowing less regularly during some periods is the most common action made when moving the lawn (44%)

Biodiversity behaviour and maturity 4/5



Share who considers biodiversity when moving their lawn



Base: 502 IP

Q: Do you consider biodiversity when mowing your lawn?

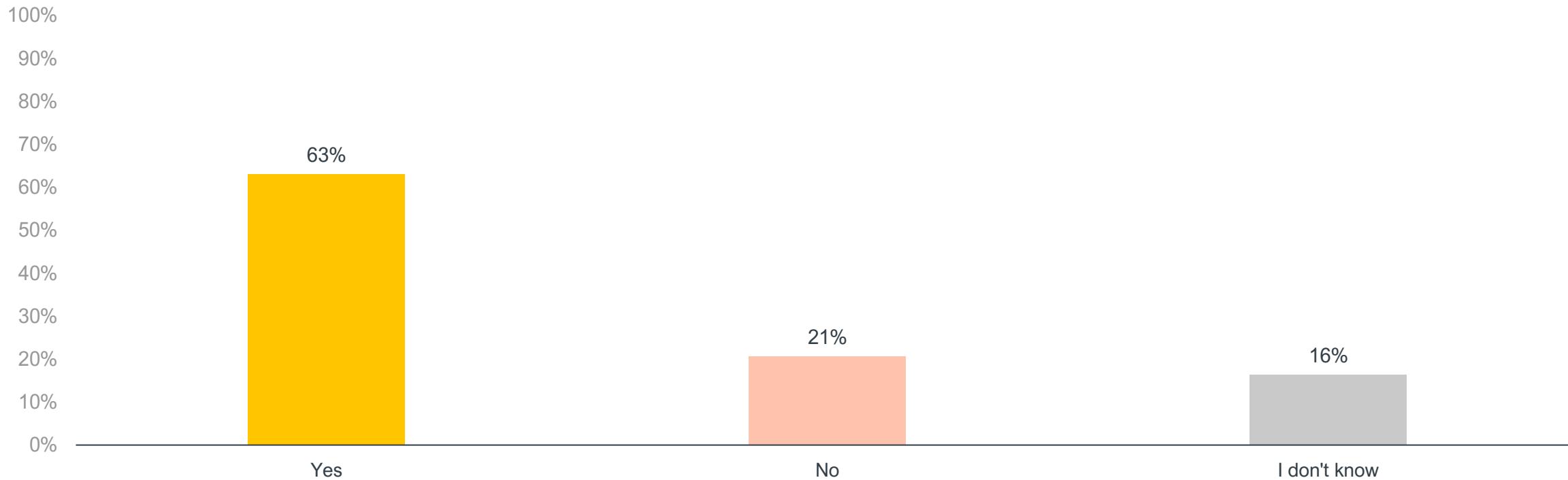
119

The majority (63%) are interested in learning more about how to let the biodiversity thrive in the garden

Biodiversity behaviour and maturity 5/5



Would you like to learn more about ways to let biodiversity thrive in your garden?



Base: 502 IP

Q: Would you like to learn more about ways to let biodiversity thrive in your garden?

120

Nepa

Summary: Belgium



Overview potential market	<ul style="list-style-type: none">65% of the Belgian population state that they own a garden with a lawn
Garden behaviour	<ul style="list-style-type: none">For Belgians it's attractive with a well-arranged garden that should be a relaxing space, it's most common to spend 4h-8h per week on gardening
Biodiversity awareness and perception	<ul style="list-style-type: none">Half of the study population have some understanding of what the term means while 20% are very familiar with the term“Different species of plants and animals” are most often mentioned when respondents are asked to describe the term in their own wordsThe majority are equally concerned about climate change and decreasing biodiversity and states that it is a shared responsibilityMost people (40%) think that their own garden only contributes to a small extent to increasing biodiversityOne third of the population have no clue how to act in order to make the garden more biodiverse
Biodiversity behaviour and maturity	<ul style="list-style-type: none">The most common perception (49%) is that biodiversity is fairly important when planning their garden projectsThe main barrier is lack of knowledge; a better understanding would increase the likelihood of action being takenIn Belgium, the most common action is to avoid using chemical pesticides and rainwater harvestingMowing less regularly during some periods is the most common action made when moving the lawn (44%)The majority (63%) are interested in learning more about how to let the biodiversity thrive in the garden

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 - Netherlands - *slide 94*
 - Belgium - *slide 108*
 - Poland - *slide 122*

51% of the Polish population state that they own a garden with a lawn

Overview potential market

1/1

Share of population owning a garden with a lawn



Base: 1001 IP

Q: Which of the following statements are correct when describing your home? (I own a garden with a lawn)

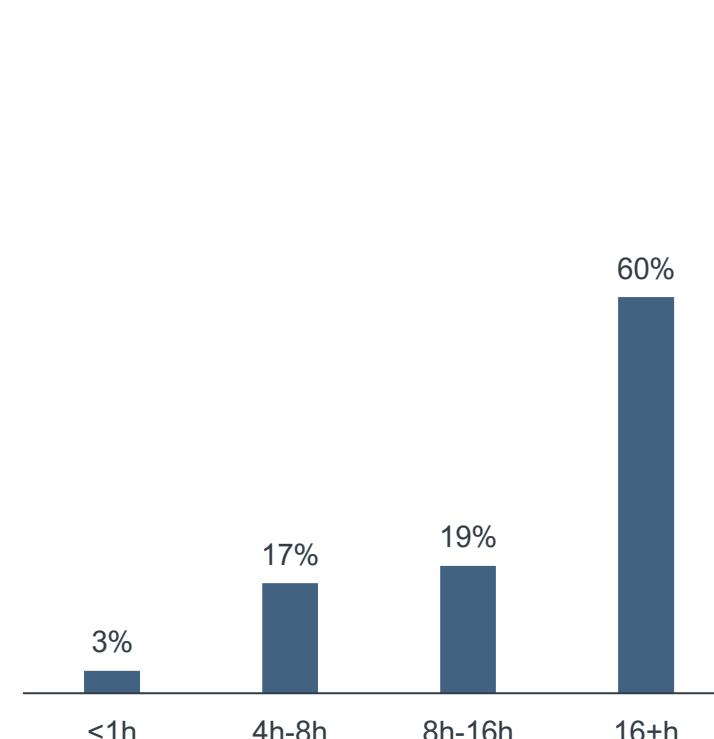
123

Time spent on gardening is high in Poland with 60% spending 16+h, top priority is that the garden is well arranged and a good space for activities

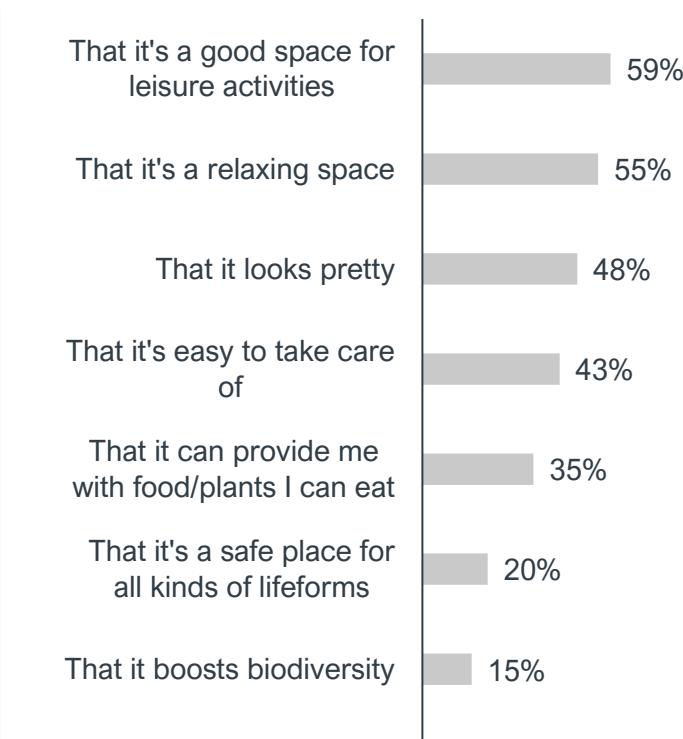
Garden behaviour

1/1

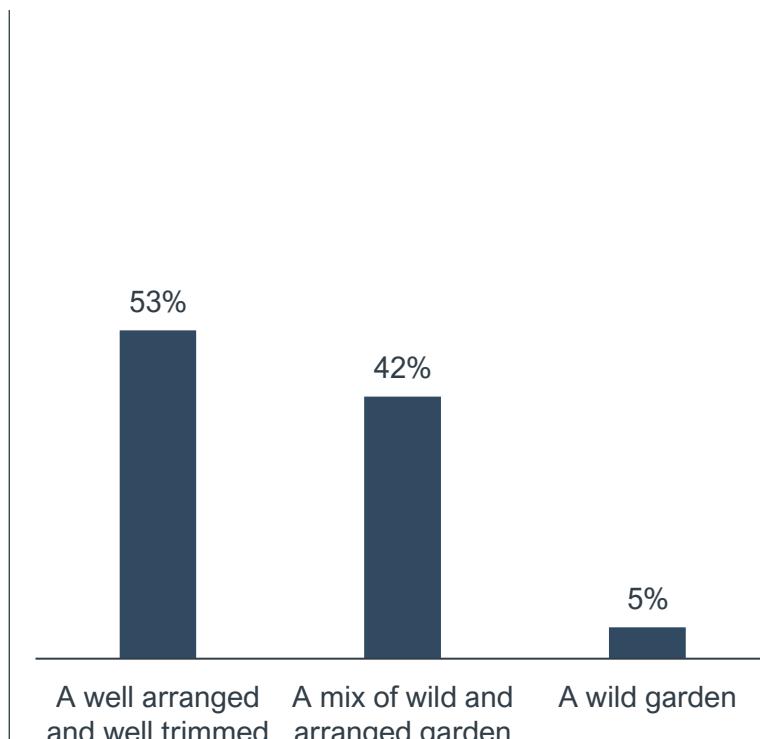
Time spend gardening during season



Top priorities when designing garden



Most attractive garden types



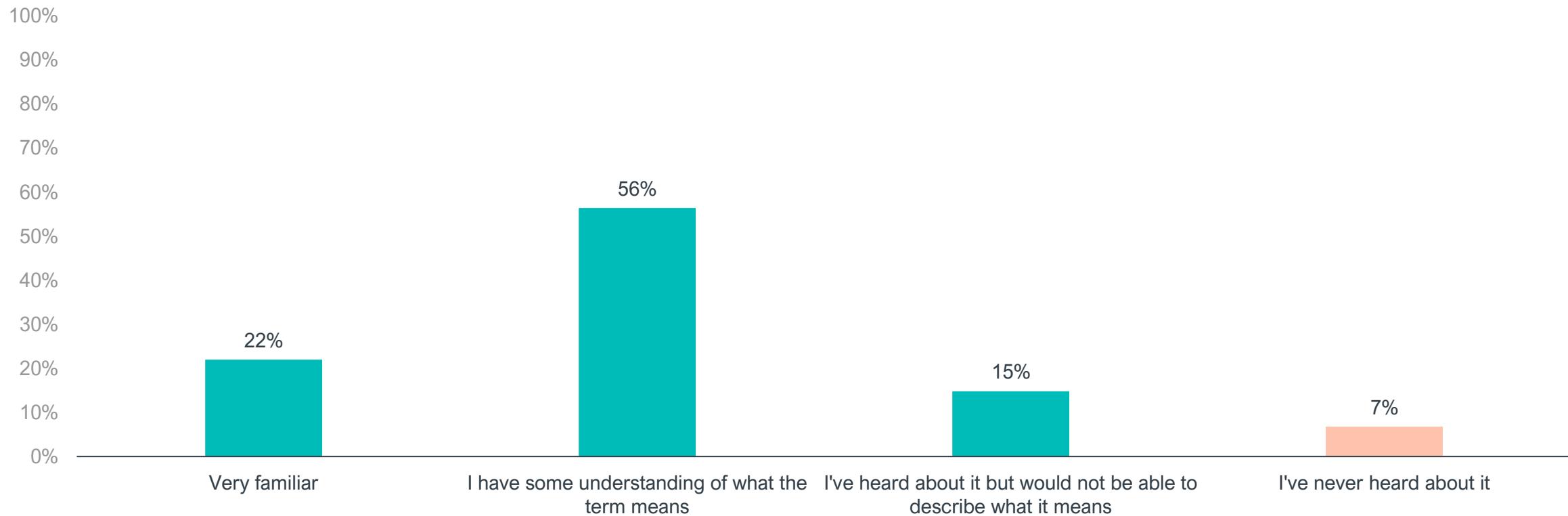
Base: 503 IP

Q: How much time do you spend gardening during the gardening season (i.e. spring/summer/autumn)?, What are your top priorities when designing your garden? (possible to choose max 3 options), Which of these garden types is most attractive according to you?

Awareness of biodiversity is rather high, 22% are very familiar with the term and the majority (56%) have some understanding

Biodiversity awareness and perception 1/5

Awareness/familiarity with the term Biodiversity, % of lawn owners



Base: 503 IP

Q: How familiar are you with the term biodiversity?

125

“Various plants and species” are the most often mentioned words when the garden owners were asked to describe the term in their own words

What does the term biodiversity mean?

Base: 503 IP

Q: What does the term biodiversity mean?

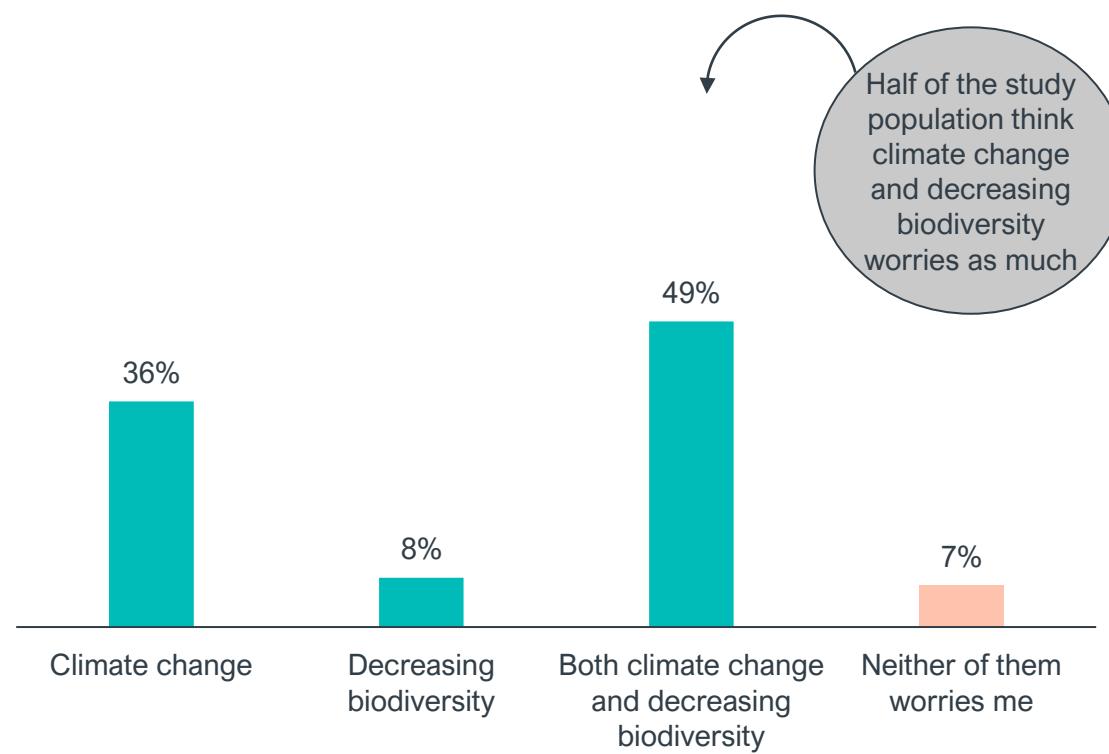
126

The majority of the garden owners believe that maintaining biodiversity is a joint effort, many also place great responsibility on themselves (22%)

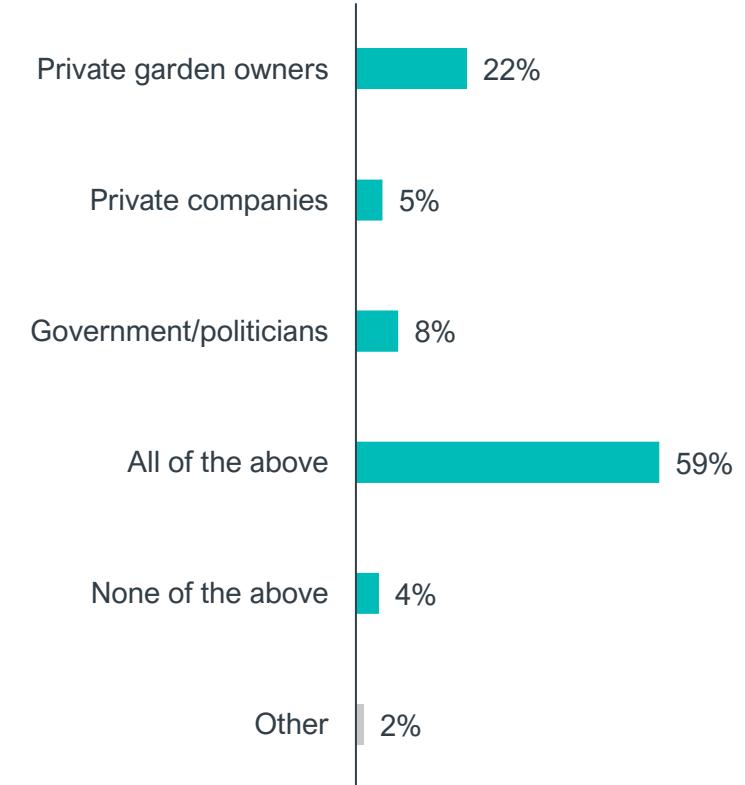
Biodiversity awareness and perception

3/5

Sustainability issues that worries



Greatest responsibility in maintaining biodiversity



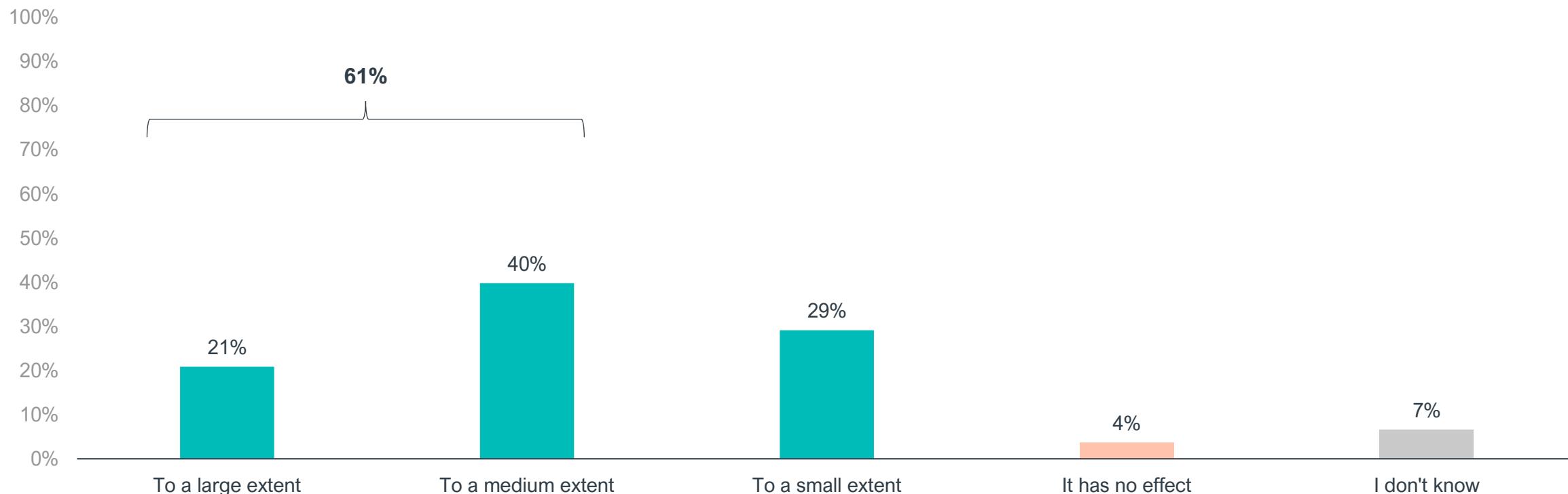
Base: 503 IP

Q: Which of these sustainability issues worries you the most?, According to you, who carries the greatest responsibility in maintaining biodiversity?

~60% think that their own garden can help boost the biodiversity to a medium or large extent

Biodiversity awareness and perception 4/5

The perception of what extent the own garden can help boost biodiversity



Base: 503 IP

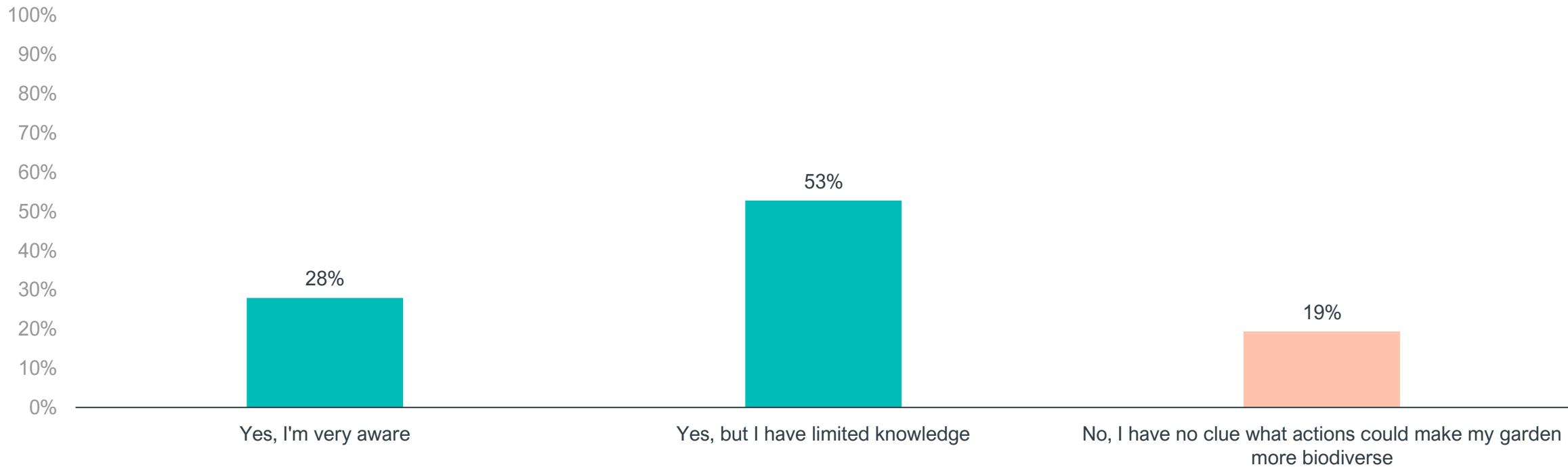
Q: To what extent do you think that your own garden can help boost biodiversity?

128

1/3 say they are very aware of how to make the garden more biodiverse; the rest have either limited knowledge (53%) or no clue (19%)

Biodiversity awareness and perception 5/5

Awareness of actions to make own garden more biodiverse



Base: 503 IP

Q: Do you know what actions you can take to make your garden more biodiverse?

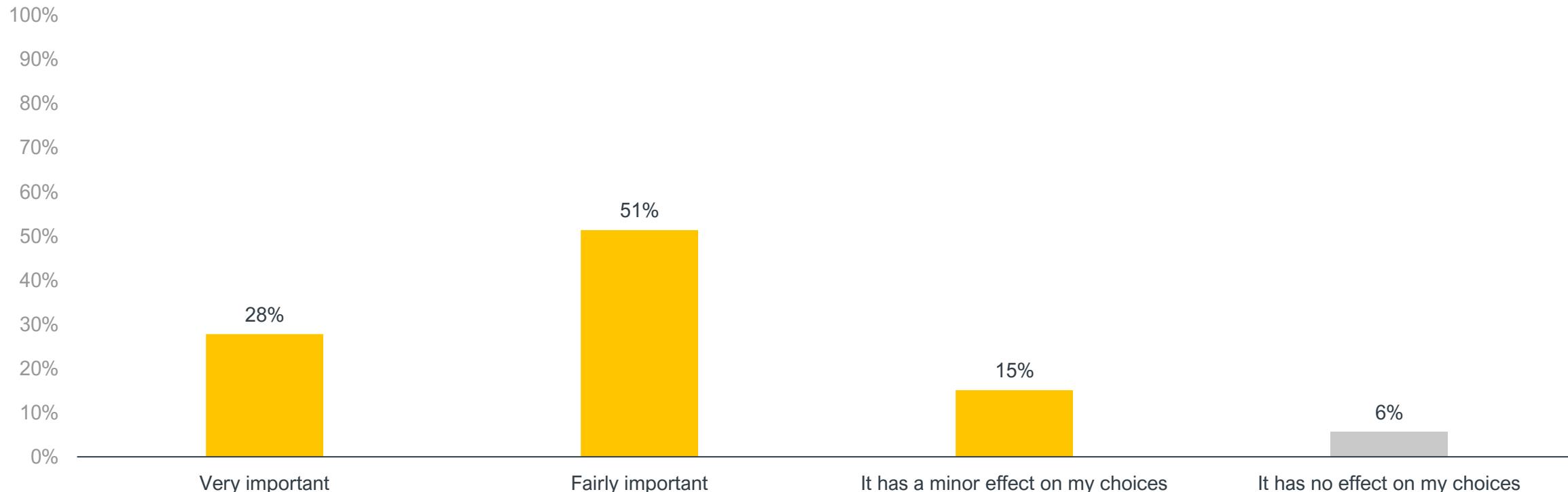
129

Poles understand the importance of biodiversity when planning garden projects, with only 21% saying it has minor or no effect

Biodiversity behaviour and maturity

1/5

Importance of biodiversity when planning garden projects



Base: 503 IP

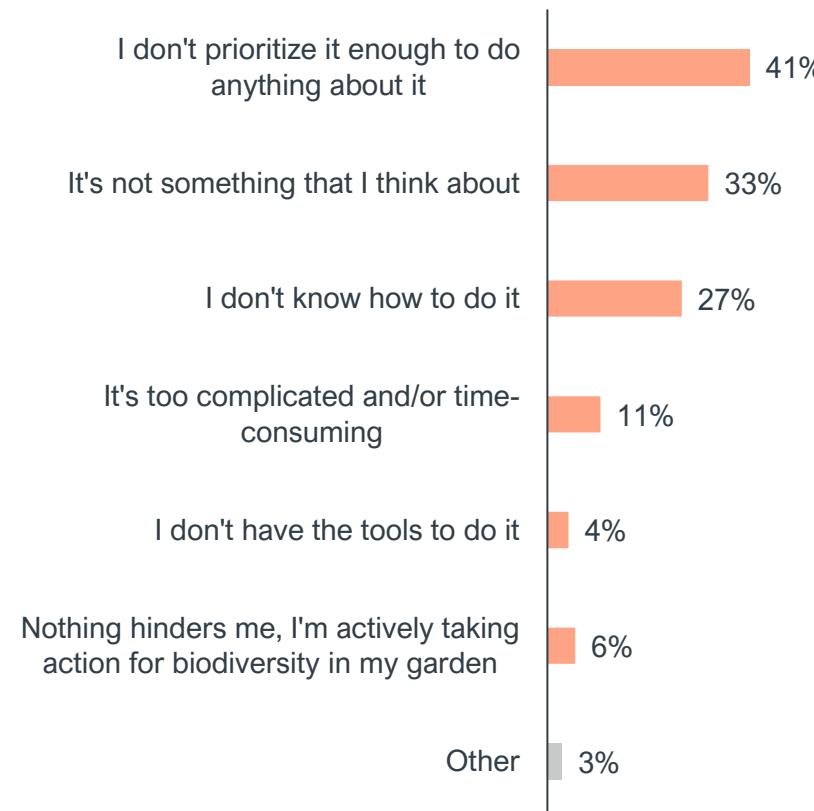
Q: When you plan your garden projects, how important is biodiversity?

130

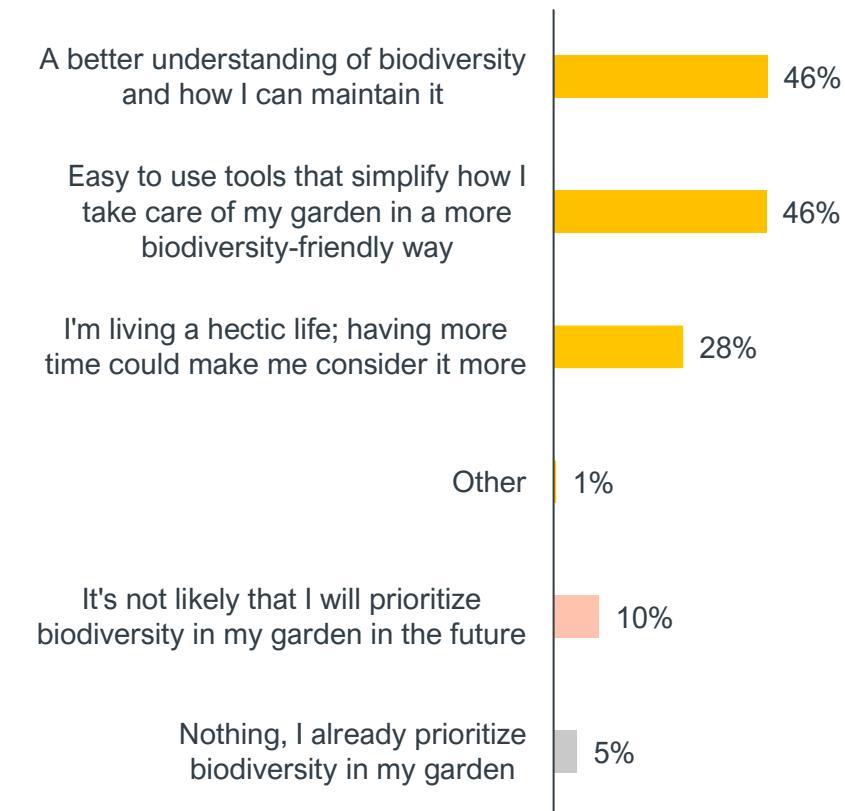
Making the garden more biodiverse is not prioritized by 41%, a better understanding would facilitate increased focus on biodiversity

Biodiversity behaviour and maturity 2/5

Barriers for making the garden more biodiverse



What would make consumers more likely to increase biodiversity in their garden



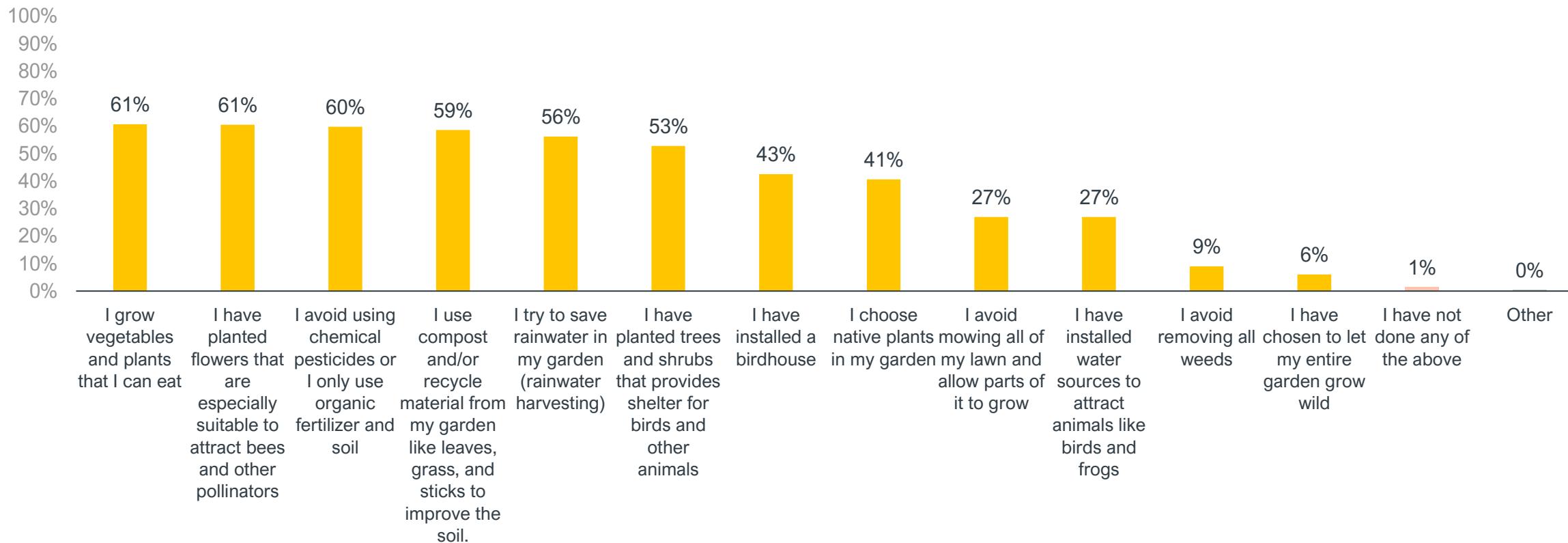
Base: Barriers – 109 IP, More likely to increase – 503 IP

Q: What – if something – hinders you from making your garden more biodiverse? What would make you more likely to increase biodiversity in your garden?

Growing vegetables and edible plants and planting flowers that attract bees/other pollinators are the most common action made

Biodiversity behaviour and maturity 3/5

Which biodiversity actions taken in the own garden



Base: 405 IP

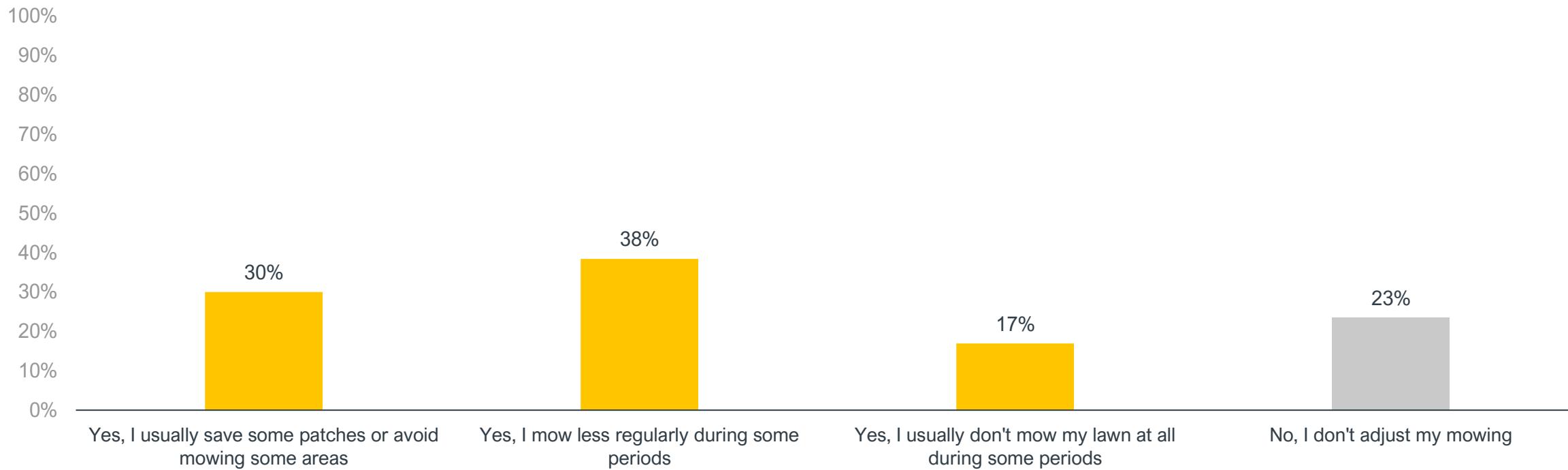
Q: Which of these actions have you taken to increase biodiversity in your garden?

132

~80% are considering biodiversity when mowing the lawn, either by mowing less often or by avoiding some areas

Biodiversity behaviour and maturity 4/5

Share who considers biodiversity when moving their lawn



Base: 503 IP

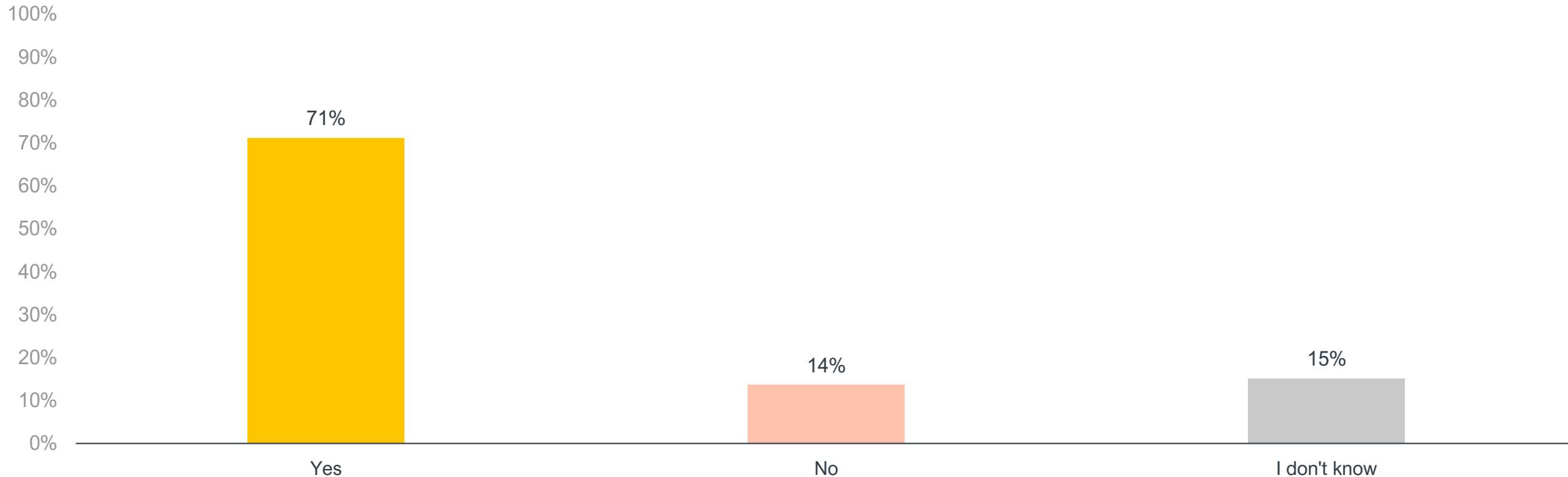
Q: Do you consider biodiversity when mowing your lawn?

133

The majority (71%) would like to learn more about ways to let biodiversity thrive in their garden

Biodiversity behaviour and maturity 5/5

Would you like to learn more about ways to let biodiversity thrive in your garden?



Base: 503 IP

Q: Would you like to learn more about ways to let biodiversity thrive in your garden?

134

Summary: Poland

Overview potential market

- 51% of the Polish population state that they own a garden with a lawn

Garden behaviour

- Time spent on gardening is high in Poland with 60% spending 16+h, top priority is that the garden is well arranged and a good space for activities

Biodiversity awareness and perception

- Awareness of biodiversity is rather high, 22% are very familiar with the term and the majority (56%) have some understanding
- “Various plants and species” are the most often mentioned words when the garden owners were asked to describe the term in their own words
- The majority of the garden owners believe that maintaining biodiversity is a joint effort, many also place great responsibility on themselves (22%)
- ~60% think that their own garden can help boost the biodiversity to a medium or large extent
- 1/3 say they are very aware of how to make the garden more biodiverse; the rest have either limited knowledge (53%) or no clue (19%)

Biodiversity behaviour and maturity

- Poles understand the importance of biodiversity when planning garden projects, with only 21% saying it has minor or no effect
- Making the garden more biodiverse is not prioritized by 41%, a better understanding would facilitate increased focus on biodiversity
- Growing vegetables and edible plants and planting flowers that attract bees/other pollinators are the most common action made
- ~80% are considering biodiversity when mowing the lawn, either by mowing less often or by avoiding some areas
- The majority (71%) would like to learn more about ways to let biodiversity thrive in their garden



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