



HTA Member Benchmarking Platform

USER GUIDE 2025

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Introduction to the HTA Member Benchmarking Platform

The new HTA Member Benchmarking Platform is designed to be a **singular platform for all the HTA's manual benchmarking surveys** and their corresponding business and benchmarking comparison reports.

The platform will launch with Retail Sales, Weekly Retail Sales and Grower Sales benchmarking in early 2025 before being further augmented, in the short-term, by Wages, Business Financials and Grower Inputs benchmarking and, in the long-term, additional topics deemed relevant.

The platform will be hosted online and **accessible via direct URL or the HTA website**. Log-in is managed via the HTA's 'single sign-on' infrastructure, meaning your credentials for this platform will be the same as other HTA websites such as hta.org.uk or the Member Store.

This document is **intended as a guide for new users** to onboard, navigate and use the platform – if you require further assistance, please contact:

marketinfo@hta.org.uk

The screenshots used to illustrate logging data and viewing reports in this guide are primarily based on the 'Retail Sales' and 'Grower Sales' benchmarking studies.

Please note that while the form and reporting components may change depending on the benchmarking study, the steps for accessing each part remain consistent.

Furthermore, all data used in the screenshots below is test data for illustrative purposes only.



Initial Set-Up

All businesses will need to 'onboard' themselves prior to accessing the platform to confirm relevant 'static' information about the business that won't change at regular intervals (i.e. primary business activity, region etc.). Onboarding will take place the first time a user from a given business logs-in, and this user will become the 'Member Admin' user for that business. Any subsequent logins linked to the business will not require the onboarding questions to be completed.

'MEMBER ADMIN' USER

The 'Member Admin' user will be the first user from a given business to log-in **by default**. They are responsible for onboarding the business to the platform and managing other users' permissions to access the benchmarking studies and data on the platform, and as such **we would recommend that they are suitably senior individuals within the business.**

By default, the person HTA has listed as the 'Primary Contact' in our database will be given permission to access the HTA Member Benchmarking Platform. Any other persons will not have access to HTA Member Benchmarking as standard and will need to request access permission via the form on the HTA website here: hta.org.uk/benchmarking or by contacting marketinfo@hta.org.uk.



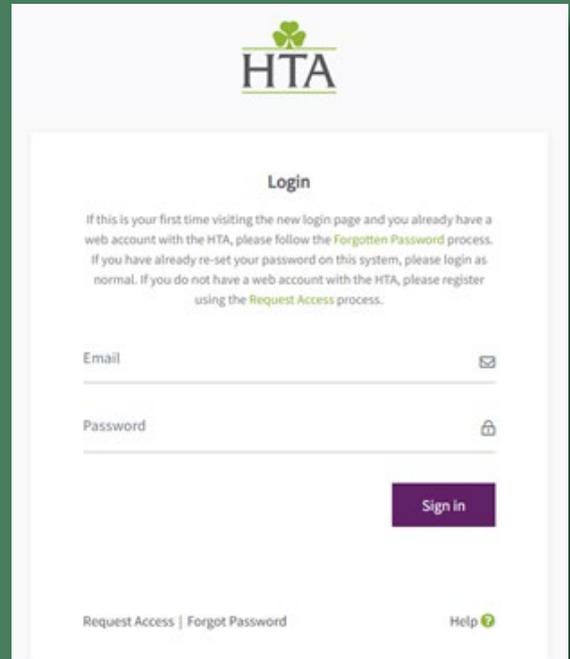
Note: as many users at a business as necessary can be granted access to the HTA Member Benchmarking Platform, and the Member Admin user can manage their Edit/View permissions (see Organisation section of this User Guide) to access only the appropriate benchmarking studies.

LOGIN

On accessing the platform, users will be presented with the platform log-in screen.



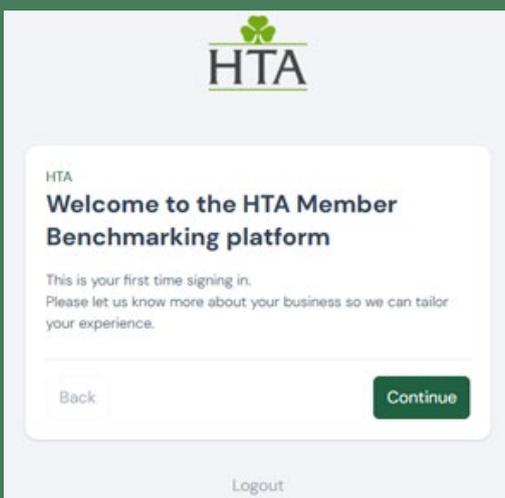
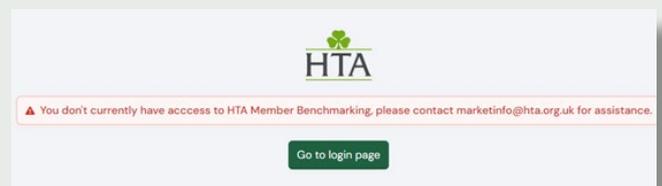
If the user is currently logged out of the HTA single sign-on environment (i.e. the login area linked to the hta.org.uk website, the Member Store, and the Member Benchmarking platform), pressing the 'Login' button will redirect the user to the HTA's single sign-on log-in, where they can enter their credentials and 'Sign in' to proceed.



If the user does not currently have a HTA website login, they will first need to click 'Request Access' for this to be setup. Once this is setup, the user will be notified and asked to set their password.

If the user is currently logged in to the HTA single sign-on environment, then they will proceed automatically to the 'Onboarding' pages (if they are the first user to login from their business, and therefore the 'Member Admin' user) or the home page (if onboarding has already been completed).

If the user does not currently have the requisite permission to access the HTA Member Benchmarking Platform, the single sign-on will redirect them to an access denied error page.





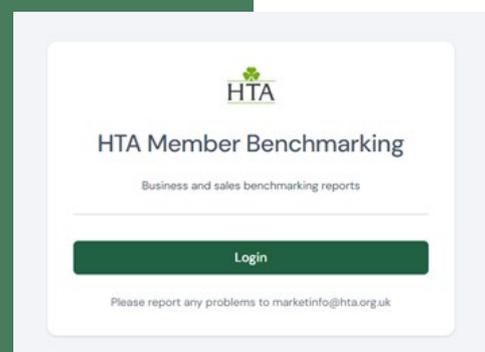
ONBOARDING

Onboarding is the process by which the 'Member Admin' user sets up their business on the platform. It is done only once at the point of first log-in associated with a business, with the answers saved in the platform to identify tailored comparison groups for benchmarking purposes (BIS/RDF/NBIS group membership will be fed directly from HTA records).

ONBOARDING QUESTIONS COVER:

- Your primary business activity (i.e. retailer, grower, landscaper etc.)
- Any secondary business activities
- Whether you wish to benchmark at a 'Head Office' or a 'Premise' level 'Head Office' if you're a single-site business; but if your business is multi-site, it is up to you whether you wish to benchmark each 'Premise' individually or collate the figures for all your sites together ('Head Office')
 - If you choose 'Premise' level, you will need to complete the onboarding questions for each 'Premise' separately (premise names will be pre-populated according to HTA data).
- Your region
- Your turnover category
- If you have a café/restaurant (retailers only)
- The types of crops grown (growers only)
- The markets your crops are supplied to (growers only)
- Production area (growers only)

The answers provided to these questions will then add your business to comparison groups for benchmarking against other members who meet the same criteria.



Should any answers need changing in the future, please contact marketinfo@hta.org.uk and the team will change these for you.

Example Onboarding Screens

HTA

Business Information

Your business type

On record, the HTA has your business' primary activity listed as the following - please confirm this is correct, or update this for benchmarking purposes to ensure you have access to the relevant studies.

Retailer

[Change primary business type](#)

Does your business operate any additional business activities? (please tick all that apply)

Grower Retailer
 Landscaper Garden Designer
 Professional Gardener Manufacturer and Supplier

This will allow us to make sure all of the relevant benchmarking studies are made available to you.

Back Continue

Logout

HTA

Business Information

Premises

Would you like your business to benchmark at a Head Office or a Premise Level?

Head office level (i.e. all sites combined)

Note: this only applies to Sales & Grower Inputs benchmarking; Wages & Financial benchmarking will only be possible at a Head Office level.

Back Continue

Logout

HTA

Business Information

Premises

Would you like your business to benchmark at a Head Office or a Premise Level?

Premise level (i.e. record figures and benchmark eac...)

Note: this only applies to Sales & Grower Inputs benchmarking; Wages & Financial benchmarking will only be possible at a Head Office level.

Which of the following business types does this business/site relate to?

Premise 1

Retailer

Premise 2

Retailer

The final step of the onboarding process for all users is to read and accept the HTA's Terms of Use for the benchmarking platform. Usage of the platform without accepting the Terms of Use is prohibited.

TERMS OF USE

These terms and conditions ("Terms") govern the basis on which You (and Your employees and contractors) access and use the System (as defined below), which is permitted by virtue of Your membership of the HTA (as defined below) and they form part of the terms of such membership. In the event of a conflict between the terms of membership of the HTA and these Terms, these Terms shall prevail.

By accessing and using the System You (and Your employees and contractors) agree to these Terms.

1. DEFINITIONS AND INTERPRETATION

1.1 In these Terms the words referred to below shall have the following meanings:

"Data" means the information submitted by, and made available to, You and other members of the HTA (including

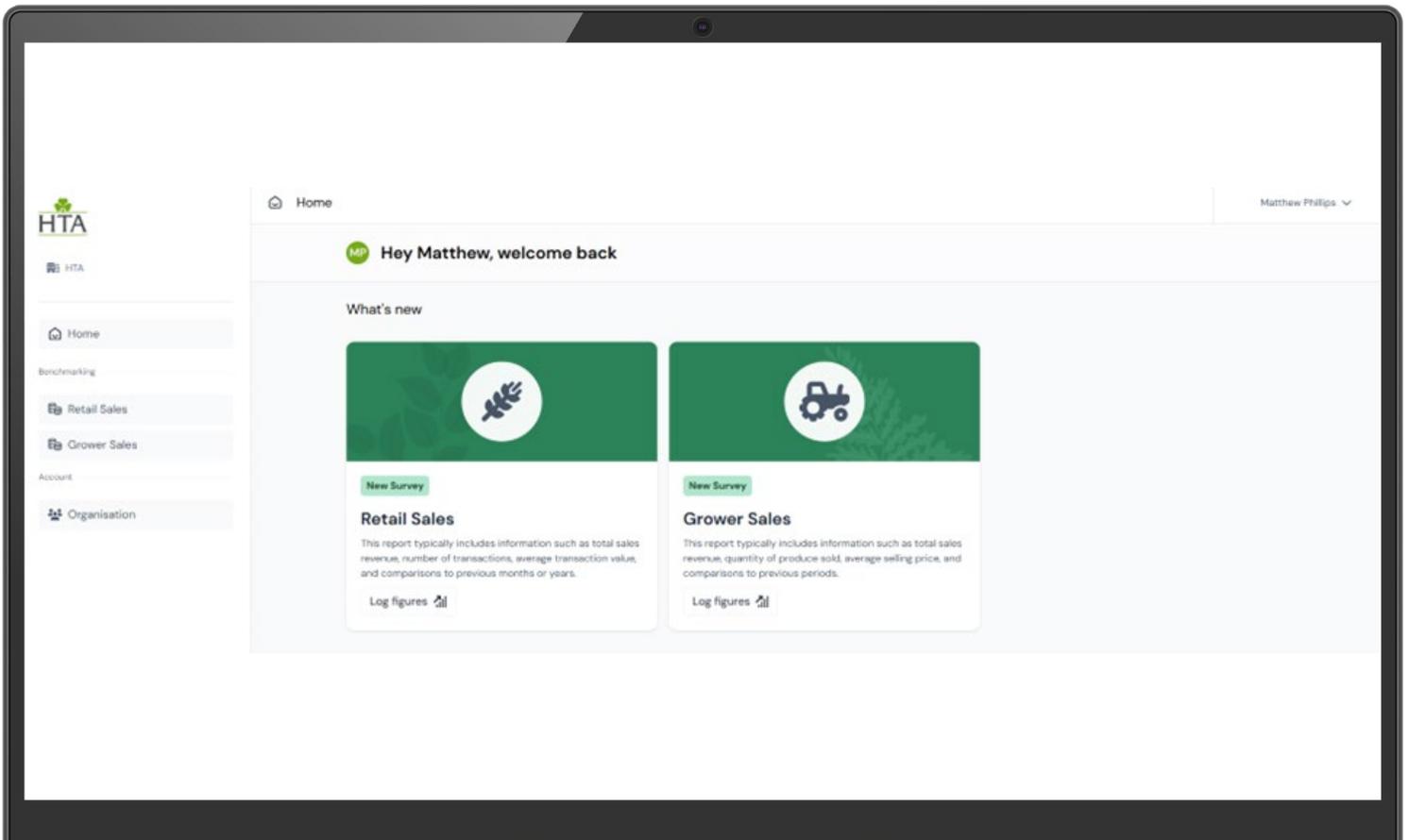
I accept these Terms & Conditions on behalf of Business name

Complete



HOMEPAGE

After completing onboarding or on each subsequent log-in, you will be directed to the home page of the platform. The benchmarking studies available to you, based on your permissions, onboarding answers about your business activity and HTA data on group membership, will be immediately visible in 'widget' form. On the left-hand side you will also see the navigation menu, again showing the benchmarking studies available to you under the 'Benchmarking' heading as well as the 'Organisation' section under the 'Account' heading.





ORGANISATION

The Organisation section is where a 'Member Admin' user can manage the View/Edit permissions of other users in the business, on a per benchmarking study basis. After onboarding, the 'Member Admin' user will be ready to begin using the platform. If more users for your organisation are required, you or they will need to complete the request permission form on the website here: hta.org.uk/benchmarking or contact marketinfo@hta.org.uk with the user's name(s) and email address(es), and the HTA will give them permission to access the platform.

The first time they log in, by default a new user will not have permission to access any of the benchmarking studies (as per the below screenshot). The 'Member Admin' user will need to log-in and assign permissions for each of the available benchmarking studies (and each of the premises, if applicable) as appropriate.



We recommend that you ensure each user has an individual, rather than shared, email address to ensure access is limited to only those users you intend.

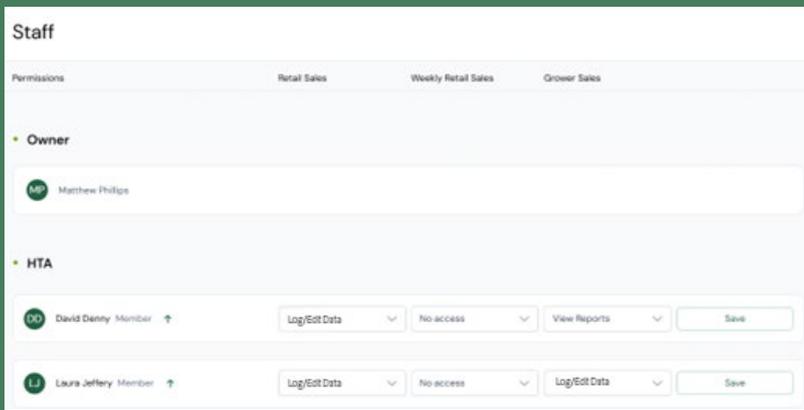
 David Denny Member ↑	▼	▼	▼	Save
 Laura Jeffery Member ↑	▼	▼	▼	Save

Each benchmarking study has three levels of permission – 'No Access', 'View Reports' and 'Edit'.

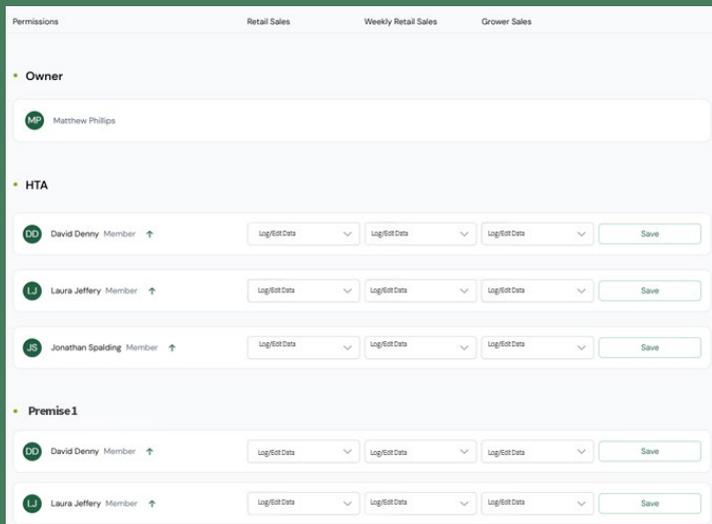
'No Access' ensures that the benchmarking study and corresponding data logging and reporting areas cannot be viewed by the user. For example, you may wish to restrict access to Wages Benchmarking to a senior leader or member your staff responsible for HR.

'View Reports' allows the user to see the reports generated by the data in the platform, but not log/edit data themselves.

'Log/Edit Data' allows the user to log/edit data and view the corresponding reports.

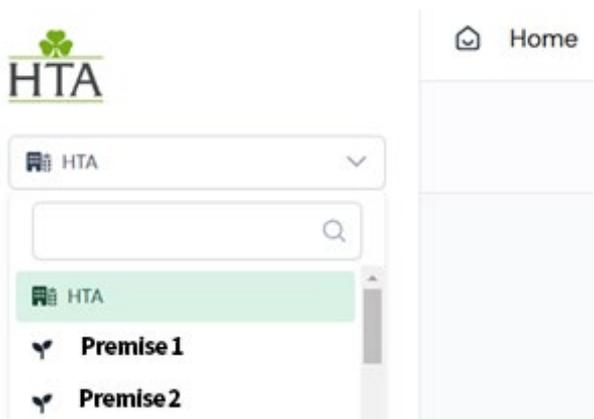


 If you are benchmarking at the premise level, you will need to set permissions for each user at each premise.



SWITCHING BETWEEN PREMISES

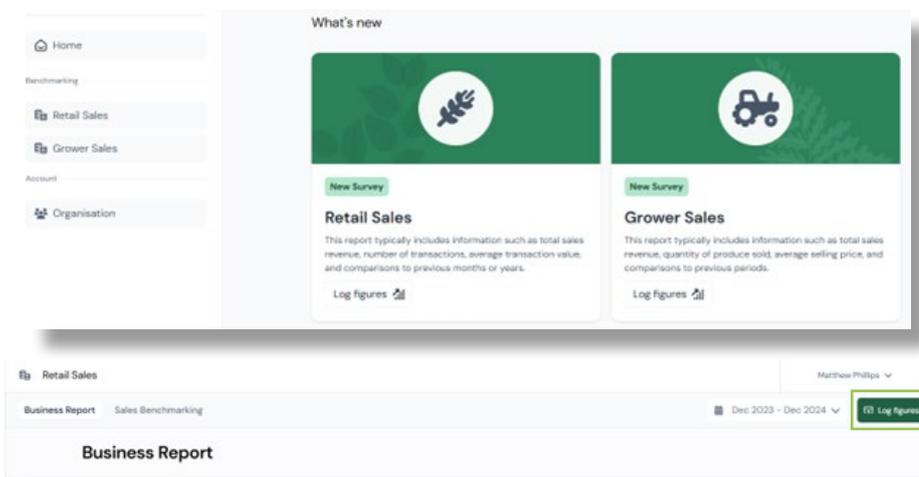
If you choose to benchmark at the premise level, you will be able to switch between your premises for logging / editing figures or viewing reports via the drop-down menu at the top of the navigation menu.



If, at any point, you'd like to change from Head Office to Premise benchmarking or vice versa after onboarding, please contact: marketinfo@hta.org.uk.

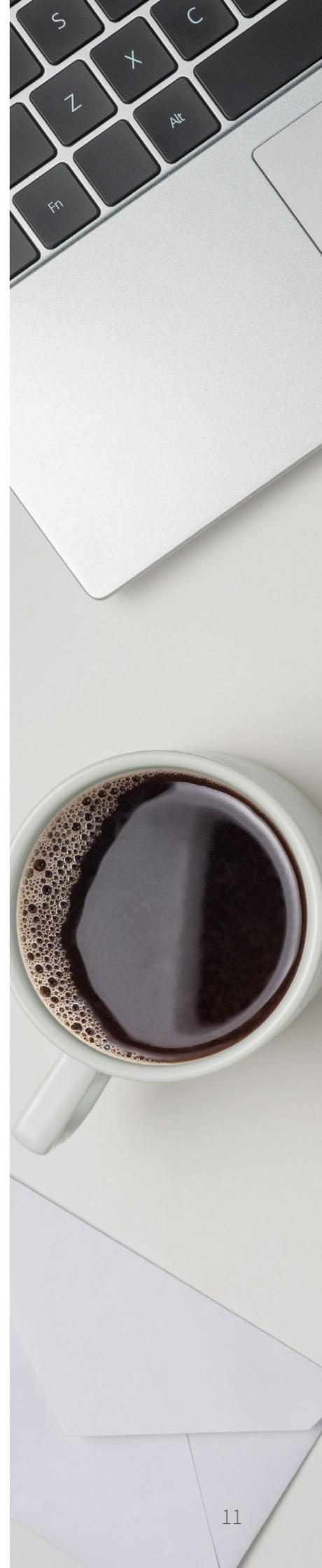
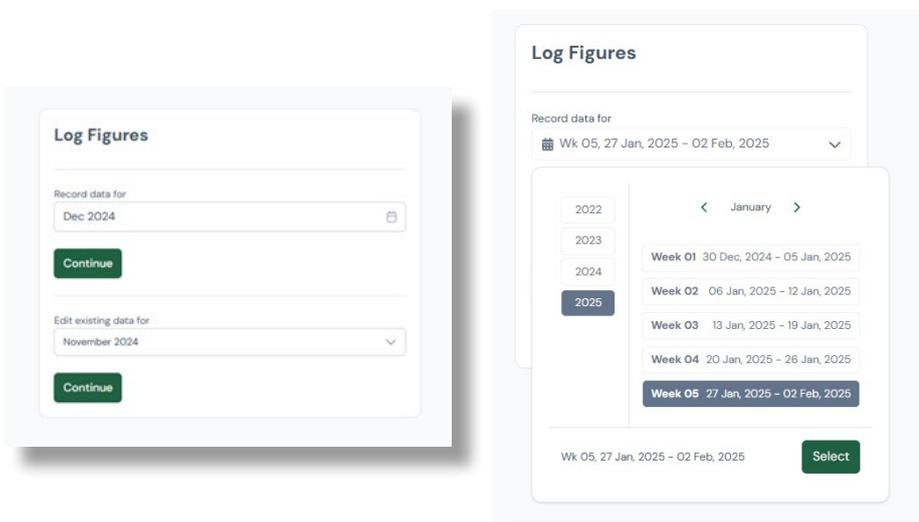
Logging & Editing Figures

To begin logging figures on the platform, click on the relevant benchmarking study via either the navigation menu or the home page widget and, once redirected to the next page, click on the 'Log Figures' button in the top-right corner.



You will then be given the option to log new or edit previous data (n.b. to immediately benefit from benchmarking reports that compare performance to last year and the year prior, you may wish to input a 2 year back history of sales data).

Choose the appropriate time frame via the date picker and/or dropdown menu and click 'Continue'.



On the Log Figures forms you can input all relevant sales and floor or growing area figures.

Note that the floor area or growing area fields will auto-populate based on onboarding and/or the prior month's figures, but these can be edited if necessary and any edits will roll over to future months.

Log figures
Retail Sales for December 2024
Please report all sales figures in GBP (£) exclusive of VAT.

Sales

Overall Sales (garden store)

Bedding plants

Houseplants

Hardy plants

Other

Catering

Catering

Overall Sales

Overall Sales (garden store and catering) £000

Transaction Numbers

Garden store

Garden store ATV £000

Cafe/restaurant

Catering ATV £000

Floor Area

This information will be used to provide you with a sales (£) per m2 of floor area metric to compare to peer businesses.

Bedding plants (m2)

House Plants (m2)

Log figures
Grower Sales for December 2024
Please report all sales figures in GBP (£) exclusive of VAT.

Plants produced for supply to retail
Sales

Hardy nursery stock

Bedding and other plants

Indoor plants

Plants produced for supply to retail
Individual saleable units

Hardy nursery stock

Bedding and other plants

Indoor plants

Growing area

Confirm your production area - this will be used in benchmarks for usage per hectare

Total production area (ha)

Production area under a permanent structure (i.e. glass) (ha)

Production area under a temporary structure (i.e. polytunnel) (ha)

Area of field-grown production (ha)



Viewing Reports

Selecting a time frame to report on (for studies where data is recorded monthly/weekly)

Wk 05, 27 Jan, 2025 - 02 Feb, 2025

Log figures

Week Calendar year 12 months

2022 < January >

2023

2024

2025

Week 01 30 Dec, 2024 - 05 Jan, 2025

Week 02 06 Jan, 2025 - 12 Jan, 2025

Week 03 13 Jan, 2025 - 19 Jan, 2025

Week 04 20 Jan, 2025 - 26 Jan, 2025

Week 05 27 Jan, 2025 - 02 Feb, 2025

Wk 05, 27 Jan, 2025 - 02 Feb, 2025

Select

Dec 2024

Log figures

Month < 2024 >

Calendar year

12 Months

Jan Feb Mar

Apr May Jun

Jul Aug Sep

Oct Nov Dec

Jan 2024 - Sep 2024

Log figures

Month < 2024 >

Calendar year

12 Months

Jan Feb Mar

Apr May Jun

Jul Aug Sep

Oct Nov Dec

Dec 2023 - Dec 2024

Log figures

Month < 2024 >

Calendar year

12 Months

Jan Feb Mar

Apr May Jun

Jul Aug Sep

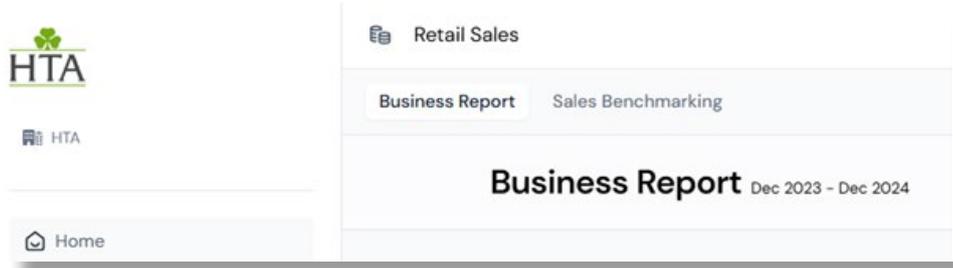
Oct Nov Dec



The data can be broken down into single week (for RDF), month, calendar year, and rolling 12-month periods using the date picker in the top-right hand corner.

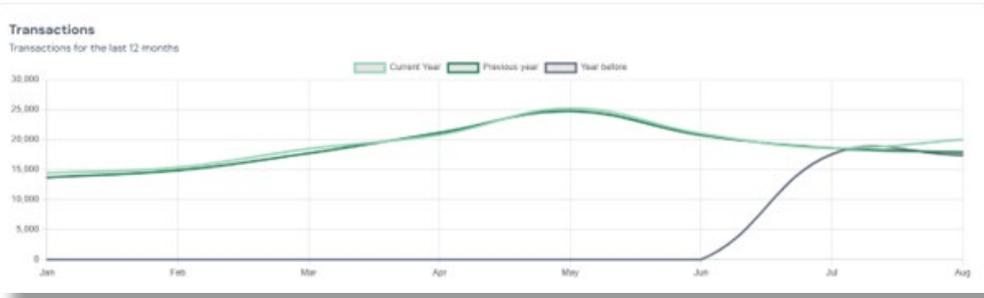
THE BUSINESS REPORTS

The Business Report section is where you can compare your business' own performance to prior years'.



The reporting shows comparisons of sales figures (and Units sold for Grower Sales benchmarking) alongside monthly breakdowns for the period selected, the percentage change and other metrics like sales per ha of growing area, and/or average transaction values in retail.





Sales by growing area

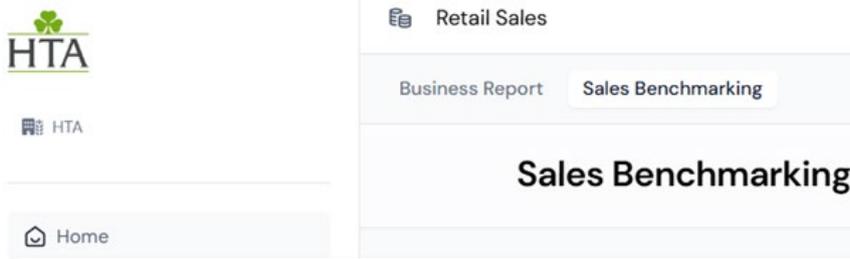
Member Name	Jan 2024 - Dec 2024		Jan 2023 - Dec 2023	
	Sales	Sales per ha	Sales	Sales per ha
Business Name	£1,000.00	£100.00	£200.00	£20.00
Business Name	£600.00	£24.00	£0.00	£0.00
Regional Average	£600.00	£24.00	£0.00	£0.00
National Average	£4,101,600.00	£164,064.00	£200.00	£20.00

These aspects are also summarised in smaller graphs/icons at the top of the report.

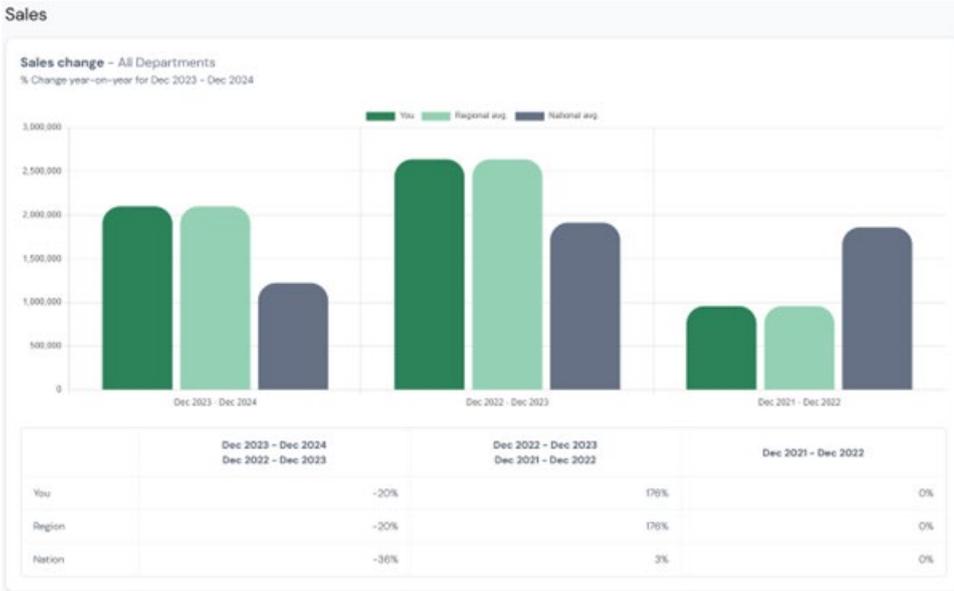


BENCHMARKING REPORTS

The Benchmarking section is where you can compare your business to other businesses within your comparison groups, for instance the benchmarking reports for Retail and Grower Sales are within the section called Sales Benchmarking.

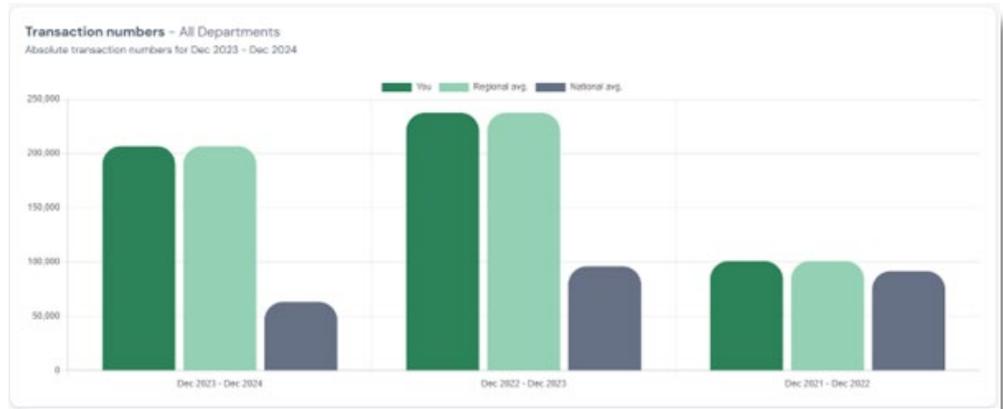


The reporting shows your performance as compared to regional and national averages.



Transaction numbers and average transaction value - All Departments

	Dec 2023 - Dec 2024		Dec 2022 - Dec 2023		Dec 2021 - Dec 2022	
	Numbers	ATV £	Numbers	ATV £	Numbers	ATV £
Dec	18,597	£11.73	16,443	£10.12	0	£0.00
Jan	14,438	£5.57	13,703	£5.75	0	£0.00
Feb	15,368	£6.86	14,684	£6.47	0	£0.00
Mar	18,474	£10.80	17,743	£8.88	0	£0.00
Apr	20,811	£13.01	21,977	£14.88	0	£0.00
May	25,257	£16.84	24,766	£17.60	0	£0.00
Jun	21,018	£13.13	20,769	£15.56	0	£0.00
Jul	18,583	£4.31	18,583	£10.41	17,575	£11.30
Aug	20,000	£5.00	17,902	£10.48	17,393	£9.43
Sep	14,181	£8.46	16,319	£9.49	15,039	£8.54
Oct	17,158	£7.29	17,158	£8.00	16,710	£8.77
Nov	0	£0.00	19,618	£8.94	17,733	£8.96
Dec	3,000	£33.33	18,597	£11.73	16,443	£10.12



If you are part of a BIS or RDF group you will also see a table comparing your performance against the peers in your group, with each business denoted via its 'confidential code'.

Member Name	Jan 2024 - Aug 2024		Jan 2023 - Aug 2023		Variance %
	Sales	ATV £	Sales	ATV £	
ABC	£756,935.42	£17.41	£948,386.90	£20.30	-20 %
DEF	£1,534,188.41	£13.84	£1,859,099.69	£14.01	-17 %

SELECTING A COMPARISON GROUP

To change the comparison group being applied, select the required group from the **'All Groups'** dropdown and then press 'Compare' to update the data. This will apply a filter to all of the graphs/tables in the chart to show you how you compare to other businesses within that group.

Sales Benchmarking

All Groups | All Departments | Compare

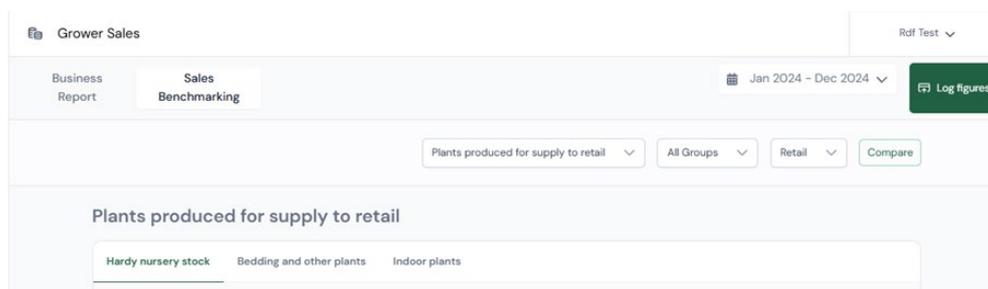
Sales

Sales change - All Departments
% Change year-on-year for Dec 2023 - Dec 2024

Legend: You (dark green), Regional avg. (light green), National avg. (dark blue)

SELECTING A REPORTING CATEGORY

To change the department, product category or market being reported on, select the required fields from the dropdown menus and click 'Compare' to update the data.



If required, a comparison group and a category can be applied together for even more in-depth comparisons (sample sizes permitting).

