

[date]

Dear Green Industry Member:

This booklet contains a survey that is critical to the future of all businesses in New England's green industry -- nurseries; greenhouses; garden centers; landscape design, installation and maintenance companies; tree care businesses; and florists. We conducted an industry-wide survey in 1999. Thanks to all of you, we were able to answer questions such as these: What is the value of New England's green industry? How many people does this industry employ? What does this industry contribute to New England's economy?

Now it's time to update our profile of New England's green industry. This information will strengthen our positions as we face legislative and regulatory challenges, and will help us all work together to build a stronger green industry in New England.

How important is your response? *It's essential!* We can only create an accurate picture of the green industry if we are able to combine data from *ALL* members of the industry. Anything less than 100% of the data will produce an incomplete and distorted picture, suggesting that the industry is smaller and of a different nature than it really is. This is a great opportunity for everyone in the green industry to work together, for everyone's benefit. Results from the first survey have been used to raise state legislators' awareness of our industry; educate young people about career opportunities; and obtain grants to support research important to our industry.

Please find 20 minutes to fill out and return this survey in the enclosed envelope by **[date]**. The number on your survey helps us track which businesses respond to the survey, but the information you provide will be completely confidential, and your business will never be identifiable from the compiled data and reports.

Thank you for your help. Your answers will help build a strong future for New England's green industry. This survey is supported by funding from the New England Nursery Association, New England Grows and the trade associations of the six New England states. Results of this survey will be distributed at New England Grows 2003 ... see you there!

Sincerely,

Dr. Leonard P. Perry  
University of Vermont

Dr. Lois Berg Stack  
University of Maine

M. Virginia Wood, CMP  
New England Nursery Association

*Before you start the survey ... Please use these definitions as you fill out this survey:*

- "Green industry": Nurseries; greenhouses; garden centers; landscape design, installation and maintenance companies; tree care businesses; and florists.
- "Gross income": Your company's total receipts from combined wholesale and retail production, sales and services.
- "Green goods": Plant items, such as live greenhouse and nursery plants, sod, seeds, cut flowers and floral arrangements.
- "Hard goods": Non-plant items such as tools, mulch, pavers, fertilizer and vases.
- "Business": If your business has more than one location, each location may receive a copy of this survey. If your different locations are all part of one business, please complete just one survey for the entire business. When you return it, include the other surveys, but mark them "DUPLICATE SURVEY." If your different locations function as separate businesses, return one completed survey for each business.
- "Percentage": Questions 2 - 4 ask you to divide amounts into percentages of the total. Please check your answers to **make sure that your percentages add up to 100%** for each question!
- "Time frame": The questions on this survey ask for information for the year 2001. If your business uses a different time period than the calendar year for accounting purposes, please use your most recently completed fiscal year in place of "2001."

**New England Green Industry  
2002 Economic Impact Survey**

1. Does your business obtain at least 50% of its gross income from activities related to the green industry?  
\_\_\_\_\_ no ... stop here, and return the survey in the envelope provided. Thank you.  
\_\_\_\_\_ yes ... go on to question number 2.
2. What percent of your business gross income was from each of these categories in 2001 or your most recently completed fiscal year? (Please check to see that your numbers total 100%.)

Wholesale: \_\_\_\_\_% Trees and shrubs  
\_\_\_\_\_% Turfgrass  
\_\_\_\_\_% Annuals, perennials, groundcovers and herbs  
\_\_\_\_\_% Potted flowering plants, indoor foliage plants and cut flowers  
\_\_\_\_\_% Hard goods

Re-wholesale: \_\_\_\_\_% Green goods, including plants, cut flowers and floral arrangements  
\_\_\_\_\_% Hard goods

Retail: \_\_\_\_\_% Green goods, including plants, cut flowers and floral arrangements  
\_\_\_\_\_% Hard goods

Services: \_\_\_\_\_% Tree care / arboriculture  
\_\_\_\_\_% Landscape design / architecture  
\_\_\_\_\_% Landscape contracting / installation  
\_\_\_\_\_% Landscape maintenance, including lawn care  
\_\_\_\_\_% Delivery

Other: \_\_\_\_\_% (Please describe): \_\_\_\_\_

Total: = **100 % Business gross income**

3. Think about your 2001 business gross income which is derived from the sale of plants, both wholesale and retail. What percentage of that income falls into each of these categories? (Please check to see that your numbers total 100%.)

\_\_\_\_\_% Plants you propagated and grew yourself  
\_\_\_\_\_% Plants you purchased as young plants, and finished growing at your business  
\_\_\_\_\_% Finished plants you purchased from another grower, and sold through your business

= **100 % Business gross income from sale of plants**

4. Indicate the percentage of your 2001 business gross income resulting from sales and services in each of these locations. (Please check to see that your numbers total 100%)

\_\_\_\_\_% Connecticut  
\_\_\_\_\_% Maine  
\_\_\_\_\_% Massachusetts  
\_\_\_\_\_% New Hampshire  
\_\_\_\_\_% Rhode Island  
\_\_\_\_\_% Vermont  
\_\_\_\_\_% Other Northeast states (New Jersey, New York and Pennsylvania)  
\_\_\_\_\_% Other states beyond the Northeast  
\_\_\_\_\_% Canada  
\_\_\_\_\_% Other countries

= **100 % Business gross income**

5. What was your business gross income in 2001, or your most recently completed fiscal year? This information is critical for the success of this survey. Be assured that your response will be held in strict confidence.

My business gross income was \$ \_\_\_\_\_ in 2001.

If you are unable to provide this specific information, please check the appropriate category below:

_____	Less than	\$25,000	_____	\$2,000,000 -	\$2,999,999
_____	\$25,000 -	\$49,999	_____	\$3,000,000 -	\$3,999,999
_____	\$50,000 -	\$74,999	_____	\$4,000,000 -	\$4,999,999
_____	\$75,000 -	\$99,999	_____	\$5,000,000 -	\$5,999,999
_____	\$100,000 -	\$249,999	_____	\$6,000,000 -	\$6,999,999
_____	\$250,000 -	\$499,999	_____	\$7,000,000 -	\$7,999,999
_____	\$500,000 -	\$749,999	_____	\$8,000,000 -	\$8,999,999
_____	\$750,000 -	\$999,999	_____	\$9,000,000 -	\$9,999,999
_____	\$1,000,000 -	\$1,999,999	_____	More than	\$10,000,000

6. By what percent has your business gross income increased or decreased in the last three years (compare 2001 to 1998)?

Gross has increased by \_\_\_\_\_% or Gross has decreased by \_\_\_\_\_%

If your business gross income stayed about the same, check here: \_\_\_\_\_

If you were not in business in 1998, check here: \_\_\_\_\_

7. In 2001, how many employees did you have in each of these categories? (Be sure to include yourself.)

\_\_\_\_\_ Full time (worked 30 hours or more per week, and worked for 9 months or more during the year)

\_\_\_\_\_ Part time (worked less than 30 hours per week and worked for 9 months or more during the year)

\_\_\_\_\_ Seasonal (worked any number of hours per week, but worked for less than 9 months of the year)

8. In 2001, how many more employees would you have hired if you could have found qualified workers?

\_\_\_\_\_ Full time (worked 30 hours or more per week, and worked for 9 months or more during the year)

\_\_\_\_\_ Part time (worked less than 30 hours per week and worked for 9 months or more during the year)

\_\_\_\_\_ Seasonal (worked any number of hours per week, but worked for less than 9 months of the year)

9. Three years ago, in 1998, how many employees did you have in each of these categories? (Be sure to include yourself.)

\_\_\_\_\_ Full time (worked 30 hours or more per week, and worked for 9 months or more during the year)

\_\_\_\_\_ Part time (worked less than 30 hours per week and worked for 9 months or more during the year)

\_\_\_\_\_ Seasonal (worked any number of hours per week, but worked for less than 9 months of the year)

If you were not in business in 1993, check here: \_\_\_\_\_

10. What was the total amount of your payroll (including wages and salaries, employee taxes, and benefits) for the year 2001, or your most recently completed fiscal year? (Be sure to include yourself.)

My total payroll was \$ \_\_\_\_\_ in 2001. ...or, if you prefer, you may check the appropriate category below:

_____	Less than	\$ 25,000	_____	\$750,000 -	\$999,999
_____	\$25,000 -	\$ 49,999	_____	\$1,000,000 -	\$1,999,999
_____	\$50,000 -	\$ 99,999	_____	\$2,000,000 -	\$2,999,999
_____	\$100,000 -	\$ 249,999	_____	\$3,000,000 -	\$3,999,999
_____	\$250,000 -	\$499,999	_____	\$4,000,000 -	\$4,999,999
_____	\$500,000 -	\$749,999	_____	More than	\$5,000,000

11. In 2001, what was the *average* annual salary you paid to each of the following categories of workers? If you pay an hourly wage, add the hours together for an annual total. Do not include benefit payments such as health insurance:
- \$ \_\_\_\_\_ Seasonal worker (worked less than 9 months of the year)
  - \$ \_\_\_\_\_ Full time worker (worked 30 hours or more per week and more than 9 months of the year)
  - \$ \_\_\_\_\_ Crew/team leader
  - \$ \_\_\_\_\_ Sales personnel
  - \$ \_\_\_\_\_ Manager (in charge of a division of your company, or in charge of entire company)
12. By what percent has your payroll increased or decreased over the last three years (compare 2001 to 1998)?
- Payroll has increased by \_\_\_\_\_% or Payroll has decreased by \_\_\_\_\_%
- If your payroll stayed about the same, check here: \_\_\_\_\_
- If you were not in business in 1998, check here: \_\_\_\_\_
13. What was your total business tax bill in 2001 (including property, sales and use, excise and income taxes)?
- My total tax bill was \$\_\_\_\_\_ ... or, if you prefer, you may check the appropriate category below:
- |                             |                             |
|-----------------------------|-----------------------------|
| _____ Less than \$10,000    | _____ \$200,000 - \$249,999 |
| _____ \$10,000 - \$24,999   | _____ \$250,000 - \$299,999 |
| _____ \$25,000 - \$49,999   | _____ \$300,000 - \$349,999 |
| _____ \$50,000 - \$74,999   | _____ \$350,000 - \$399,999 |
| _____ \$75,000 - \$99,999   | _____ \$400,000 - \$449,999 |
| _____ \$100,000 - \$149,999 | _____ \$450,000 - \$499,999 |
| _____ \$150,000 - \$199,999 | _____ More than \$500,000   |
14. By what percent has your business tax bill increased or decreased over the last three years (compare 2001 to 1998)?
- Tax bill has increased by \_\_\_\_\_% or Tax bill has decreased by \_\_\_\_\_%
- If your business tax bill stayed about the same, check here: \_\_\_\_\_
- If you were not in business in 1998, check here: \_\_\_\_\_
15. How much total acreage does your company currently occupy? \_\_\_\_\_ Acres
- How much of that land do you actually use for your company's business? \_\_\_\_\_ Acres
16. Below is a list of some of the issues currently facing our industry. Please check the **three** issues that are most important to you:
- \_\_\_\_\_ Government regulation / legislation
  - \_\_\_\_\_ Invasive plants
  - \_\_\_\_\_ Lack of qualified labor
  - \_\_\_\_\_ Pest management
  - \_\_\_\_\_ Understanding and using information technology
  - \_\_\_\_\_ Water management
  - \_\_\_\_\_ Other (please specify): \_\_\_\_\_

*Thank you* for your participation in this survey.

Please return the survey by **[date]**, in the enclosed envelope to:  
 Plant & Soil Science Department  
 Hills Science Building  
 The University of Vermont  
 Burlington, Vermont 05405-0082

