

**New England Green Industry
2005 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 2004 or your most recently completed fiscal year? (All of your percentages should add up to 100% ... please add them and adjust as needed to 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 2004 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? (Again, please check to see that your numbers total 100%.)
 - _____% Plants that you propagated and grew yourself
 - _____% Plants that you purchased as young plants, and finished growing at your business
 - _____% Finished plants that you purchased from another grower, and sold through your business

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

4. Indicate the percentage of your 2004 business gross income resulting from sales and services in each of these locations. (Once again ... 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 2004, 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 2004.

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 2004 to 2001)?

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 2001, check here: _____

7. In 2004, 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 2004, 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 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)

If you were not in business in 2001, check here: _____

10. What was the total amount of your payroll (including wages and salaries, employee taxes, and benefits) for the year 2004, or your most recently completed fiscal year? (Be sure to include yourself.)

My total payroll was \$ _____ in 2004. ...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 2004, what was the *entry level* wage you paid to each of the following categories of workers? If you pay an hourly wage, write it with the letter "H" after it. If you pay a yearly salary, write it with the letter "Y" after it. 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 2004 to 2001)?
 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 2001, check here: _____
13. What was your total business tax bill in 2004 (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 2004 to 2001)?
 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 2001, 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
 How much of that land was in a farmland preservation/protection or a similar program? _____ 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 and other species
 _____ Availability of workers
 _____ Recruiting new professionals to our industry
 _____ Pest management, including threat of new diseases and pests
 _____ Rising cost of heat / transportation / plastics
 _____ Other (please specify): _____

Thank you for your participation in this survey.
 Please return the survey by **October 26**, in the enclosed envelope to:
 Plant & Soil Science Dept., Hills Science Bldg, UVM, Burlington VT 05405-0082

September 26, 2005

Dear Green Industry Member:

Survey enclosed: 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 industry-wide surveys in 1999 and 2002. 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? [Answers: According to the last survey, this industry of \$4 billion employed more than 131,000 people, and paid \$362 million in taxes!]

How important is your response? *It's essential!* This third survey will update our profile of New England's green industry. It will strengthen our positions as we face legislative and regulatory challenges, and help us all work together to build a stronger green industry in New England. We can only create an accurate picture of the green industry if we are able to combine data from *ALL* companies that receive the survey. 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 two surveys influenced legislation, education and research funding.

Please find 20 minutes to fill out and return this survey in the enclosed envelope by **October 26**. Or, you may complete the survey now ... *online!* Simply go to the survey website (<http://pss.uvm.edu/nenasurvey/>), and start by entering EITHER the 6-figure code from the postcard you received earlier this summer, OR the number in the upper right corner of this letter. Paper or online – the choice is yours. Rest assured that regulations governing our universities guarantee the confidentiality of your response.

Thank you. Your answers will help build a stronger green industry in New England. This survey is supported by funding from the New England Nursery Association, New England Grows and the Horticultural Research Institute. Results of this survey will be distributed at New England Grows 2006 ... 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.
- "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 2004**. 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 "2004."