



## Trade Flows and Marketing Practices within the United States Nursery Industry: 2003



**Southern Cooperative Bulletin XYZ, 2005**  
<http://economics.ag.utk/pubs/crops/SCBxyz.pdf>

**John Brooker, David Eastwood, Charles Hall, and Kirk Morris**  
The University of Tennessee

**Alan Hodges and John Haydu**  
University of Florida

This report is one in a series of Southern Cooperative bulletins. Under the cooperative publication procedure, it becomes, in effect, a separate publication for each of the cooperating stations. The lead station for this study was the Department of Agricultural Economics, Tennessee Agricultural Experiment Station, 2621 Morgan Circle, Knoxville, TN 37996-4500. The World Wide Web address is: <http://economics.ag.utk.edu>

---

**Administrative Advisor:**

**CSREES Representative:** David Holder

<b><u>Participating States</u></b>	<b><u>Experiment Station Directors</u></b>	<b><u>S-290 Regional Committee Members</u></b>
Alabama	Luther Waters	John Adrian Joe Eakes Ken Tilt
Delaware	Johnny C. Nye	Susan S. Barton
Florida	Richard L. Jones	John Haydu Alan Hodges P.J. vanBrokland
Georgia	Gale A. Buchanan	Forrest Stegelin
Illinois	Steven Pueppke	Daniel Warnock David Williams
Indiana	William R. Woodson	Bruno Moser Jennifer Davis
Louisiana	R. Larry Rogers	Roger A. Hinson Jeff Kuehny
Michigan	J. Ian Gray	Bridget Behe Tom Fernandez
Mississippi	Vance H. Watson	Richard Harkess Patricia Knight Ben Posadas
New Jersey	Adesoji Adelaja	Robin Brumfield
North Carolina	Johnny C. Wynne	Charles Safley
Ohio	Steven Slack	Hanna Mathers
Oregon	Thayne R. Dutson	Larry Burt
Pennsylvania	Paul Blackman	Kathleen Kelly David Beattie
Rhode Island	Patrick A. Logan	Brian Maynard
Tennessee	C. A. Spear	John Brooker Charles Hall
Texas	Edward A. Hiler	Mike Arnold

## Abstract

Marketing- and production-related data have been collected as part of the S-1021 Research Committee's activity since 1988 (formerly S-103 and S-290). Beginning with 1988, and then at five year intervals for 1993, 1998, and 2003, mail-back surveys have been used to collect information on selected production practices, sales by type of outlet, distribution of wholesale sales by state destination, advertising expenditures, and selling methods. The overall goal of these surveys was to obtain data to permit analyses designed to provide growers with insight to help them with production and marketing decisions. Also, this type of information is beneficial to other industry participants, such as Extension personnel, researchers, and input suppliers. This effort began because of the void of industry-wide data regarding production and marketing practices of nurserymen.

The population lists for each state were assembled from the respective Department of Agriculture offices responsible for licensing nursery producers. A master file of all certified nursery operations was compiled at the University of Florida. Two states had recently completed nursery surveys, so they were excluded (AL and AZ). Four other states were excluded because of small nursery numbers (AK, KS, MD, and WI). The remaining 44 states resulted in a combined listing of 38,269 certified nursery operations. A total of 2,485 usable questionnaires was returned from a sample size of 15,588 firms.

In the first survey, respondents were asked to distribute their wholesale sales among retailers, landscapers, and re-wholesalers. Two rather major adjustments in the way this question is organized from the wording in the 1998 nationwide survey involved the mass merchant category and garden centers. The home center category was new, and designed to capture sales previously placed into the mass merchandiser category. Also, a category in 1998 that was termed "other retailers" was removed for the 2003 survey. The garden center category was separated into two classes, those with a single location and those with multiple locations. For the most recent survey, the retailer category was segmented into four categories - mass merchants, home centers, single-location garden centers and multiple-location garden centers. Several new questions were added to the latest nationwide survey questionnaire. One question asked about water use and sources of irrigation water. Another question focused on sales of native plants, which was defined as those present in the state before European settlement. Twenty-two integrated pest management practices were listed and respondents asked to indicate which practices they enforced.

Nursery professionals were asked to indicate the percentage of their total sales as wholesale versus retail. Most respondents (93.9%) answered this question. Only 6 of the 44 states had a response rate below 90 percent, and nine had 100 percent. Overall, 80.4 percent of total annual sales were classified by respondents as wholesale. In seven states, Colorado, Georgia, North Carolina, Oklahoma, Oregon, Rhode Island, and Tennessee, at least 90 percent of sales were in the wholesale category. On the other hand, there were 11 states with more than 60 percent of total annual sales in the retail category. The highest percentages among these 11 states were reported in South Dakota, Nebraska, and Mississippi, for which retail sales accounted for 84.4, 82.8, and 80.3 percent, respectively.

Wholesale sales were distributed by respondents among six outlet categories: mass merchandisers (general merchandise stores, supermarkets, etc.), home centers (home improvement, building supply, hardware, etc.), garden centers (single location), garden centers (multiple locations), landscape firms (in-house or external), and re-wholesalers (brokers, other growers, etc.). Overall, the 44 state average values for the distribution of wholesale sales among the five categories placed landscapers at the top with 33.9 percent. Second in terms of share of total weighted sales was the re-wholesaler category with 25.9 percent. Single-location garden centers accounted for 15.2 percent, home centers 10.9 percent, mass merchandisers 8.5 percent, and multiple-location garden centers the remaining 5.6 percent of weighted wholesale sales.

## Table of Contents

Abstract.....	<a href="#">ii</a>
Table of Contents.....	<a href="#">iii</a>
Acknowledgements.....	<a href="#">iv</a>
Introduction .....	<a href="#">1</a>
Objective .....	<a href="#">2</a>
Procedure.....	<a href="#">2</a>
Year Established .....	<a href="#">5</a>
Permanent and Temporary Employees.....	<a href="#">5</a>
Computer Use by Nursery .....	<a href="#">6</a>
Word Processing .....	<a href="#">6</a>
Accounting/Cost Analysis .....	<a href="#">6</a>
Inventory.....	<a href="#">7</a>
Financial Investment/Analysis .....	<a href="#">7</a>
Internet Commerce.....	<a href="#">7</a>
CDs For Marketing .....	<a href="#">7</a>
Communications/E-Mail.....	<a href="#">7</a>
Landscape Designing .....	<a href="#">8</a>
Production Scheduling.....	<a href="#">8</a>
Greenhouse Production Controls .....	<a href="#">8</a>
Digital Imaging.....	<a href="#">8</a>
Bar Coding.....	<a href="#">8</a>
Distribution of Sales by Plant Category .....	<a href="#">9</a>
Sales from Native Plants .....	<a href="#">10</a>
Irrigation Water.....	<a href="#">10</a>
Sources of Irrigation Water.....	<a href="#">11</a>
Change in Use on Per-Acre Basis .....	<a href="#">11</a>
Integrated Pest Management Practices .....	<a href="#">11</a>
Root Media.....	<a href="#">12</a>
Sources of Seedlings, Liners, Whips, Grafts, Tissue Culture Plantlets, Cuttings or Plugs ..	<a href="#">12</a>
Transaction Practices.....	<a href="#">13</a>

Trade Shows .....	<a href="#">13</a>
Sales to Repeat Customers.....	<a href="#">13</a>
Discounts Published .....	<a href="#">13</a>
Negotiated Nursery Sales.....	<a href="#">14</a>
Distribution of Sales by Transaction Method .....	<a href="#">14</a>
Advertising Expenditures.....	<a href="#">14</a>
Distribution of Advertising Dollars.....	<a href="#">15</a>
Distribution of Sales as Retail and Wholesale.....	<a href="#">15</a>
Distribution of Wholesale Sales by Outlet Category .....	<a href="#">16</a>
Mass Merchandisers .....	<a href="#">17</a>
Home Centers .....	<a href="#">17</a>
Garden Centers .....	<a href="#">17</a>
Landscape Firms .....	<a href="#">18</a>
Re-Wholesalers .....	<a href="#">18</a>
Export Market Sales .....	<a href="#">18</a>
Distribution of Wholesale Sales by State.....	<a href="#">19</a>
Handled or Resold Plants for Other Growers.....	<a href="#">20</a>
Contract Sales.....	<a href="#">20</a>
Factors Important to Price Determination.....	<a href="#">20</a>
Factors Important to Geographic Expansion .....	<a href="#">21</a>
Factors Impacting Nursery Business.....	<a href="#">21</a>
References.....	<a href="#">21</a>
Appendix .....	<a href="#">23</a>

### **Acknowledgment**

Regarding the 2003 nationwide nursery industry survey reported in this bulletin, Hall, Haydu, and Hodges received a grant from USDA-Forest Service, National Urban and Community Forestry Advisory Committee that provided the resources to enable the S-1021 survey team to include nearly every state in the 2003 survey and to draw representative samples from consistent nursery population lists. Development of the multi-state population lists and sample selection were conducted at one location for consistency. Brooker and Hall received support from the Horticulture Research Institute, American Nursery Association, to help defray some of the expense for questionnaire printing, return postage, and data entry of the information in the returned questionnaires.

## **Trade Flows and Marketing Practices within the United States Nursery Industry: 2003**

John Brooker, David Eastwood, Charles Hall, and Kirk Morris, University of Tennessee  
Alan Hodges and John Haydu, University of Florida<sup>1</sup>

### **Introduction**

Beginning with 1988, and then at five year intervals, in 1993, 1998, and 2003, mail-back surveys have been used to collect information on selected production practices, plants produced within various categories, sales by type of outlet, distribution of sales by state, advertising expenditures by mode, and selling methods for the calendar years completed prior to the late-winter distribution of questionnaires. The marketing and production data collected with the three prior surveys are reported in Southern Cooperative Bulletins SCB-358, SCB-384, SCB-397. For the first survey, 23 states participated, in the second survey, 24 states were covered, and 22 states were involved with the 1998 project. For the 2003 survey and the data reported in this bulletin, 44 states were included. All of these surveys have been conducted as part of the research program of the Green Industry Research Consortium ([www.s290.org](http://www.s290.org)), which is a Multi-State Research Committee of USDA/CSREES. This consortium includes horticulturists and agricultural economists from land-grant universities across the nation and is sponsored by the Southern Association of Agricultural Experiment Station Directors (SAAESD) as research project S1021 (formerly S103 and S290).

For the first three surveys, the consortium members, a few state nursery associations and interested university workers concerned about the nursery industry, compiled mailing lists and preformed the actual distribution of the questionnaires to their respective samples. Because the basic intent of the study was to learn more about the marketing practices and interstate flow of nursery products, most states focused on the larger nurseries, some small-production states included all known nurseries, and other

---

<sup>1</sup>Brooker, Eastwood, and Hall are professors, Morris a research associate, in the Department of Agricultural Economics. Hodges is an associate professor and Haydu a professor in the Food and Resource Economics Department.

states used a stratified sample to ensure purposeful representation of small, medium, and large growers. In some of states, the distribution samples contained all members of the state's nursery association. This variation in sampling procedure was a recognized weakness in the data collection process, but could not be overcome because of the need to have participating states cover the expense of the label preparation and postage. The need for financial and clerical help, i.e., excessive survey expenses prohibited some Extension and/or research workers from participating. Therefore, local budgetary problems resulted in the exclusion of several key states.

### **Objective**

The overall goal of these surveys is to obtain data to permit analyses of selected production and marketing factors in order to provide growers with additional information that could help them with strategic planning decisions. Also, this type of information is beneficial to other industry professionals, such as Extension personnel, researchers, and input suppliers. This data collection effort began because of the void of industry-wide data regarding production and marketing practices in the green industry. The data collected by these surveys supplements rather than duplicates data collected by the National Agricultural Statistics Service.

### **Procedure**

The population lists for each state were assembled from the respective Department of Agriculture offices responsible for licensing nursery producers. A master file of all certified nursery operations was compiled at the University of Florida. Two states had recently completed nursery surveys, so they were excluded (AL and AZ). Four other states were excluded because of small nursery numbers (AK, KS, MD, and WI). The remaining 44 states resulted in a combined listing of 38,237 certified nursery operations.

Based on budgetary consideration, and sample size necessary from a statistical perspective, the decision was made to draw a sample in the neighborhood of 15,000 firms. Mailing labels and other tasks associated with distribution were conducted by the Florida members of the survey team. A letter explaining the purpose of the survey and encouraging participation was included with the questionnaire. One week after the initial distribution of the questionnaire, a postcard was mailed to the entire sample as a reminder. A second

questionnaire with a second encouragement-letter was mailed to nonrespondents approximately three weeks after the first mailing. All completed questionnaires were returned to Tennessee for data entry into computer files.

Sample selection in each state was based on that state's proportion of the nursery population list. Stratified samples were drawn in each state based on the number of firms in size classes in each state. Nurseries were grouped as small, medium, or large based on acreage. The small category was defined as nursery operations with less than five acres, medium-sized nurseries were those with 5 to 20 acres, and large nurseries had 20 or more acres. In several states, the nursery acreage values were not available, or not available for all certified operations. After study of the distribution of all nurseries by these three size designations and the number of nurseries of unknown size, the decision was made to sample 100 percent of the large nurseries, 60 percent of the medium nurseries, and 25 percent of the small nurseries. In the states where the acreage was unavailable, at least 40 percent of the identified firms received questionnaires. In nine states, a complete census was attempted because of the small number of firms in the state. The final breakdown was 3,476 large nurseries, 3,778 in the medium category, 5,996 of the small firms, and 2,338 of unknown size, resulting in a total sample size was 15,588.

For the data collected in the three previous surveys, the surveyed states represented 79, 81, and 69 percent of the nation's grower cash receipts respectively (SCB-358, SCB-384, SCB-397). This fourth survey that covered 44 states represented 93 percent of total cash receipts for greenhouse and nursery crops in the U.S. (Table 1). The basic format of this bulletin will be similar to the previous manuscripts for each of the three survey efforts. Generally, results from each survey question are presented with little more than basic descriptive statistics. Subsequent analyses in various states will focus on more involved investigations of the survey data. Interested readers are referred to the Tennessee authors for details regarding the availability of the raw data.

*See Table 1*

While an important consideration after the first survey for 1988 has been to have the same questions in subsequent surveys so comparisons could be made regarding adjustments in nursery production and marketing practices over time, the questionnaire has

been modified, where necessary, to improve the quality and usefulness of information collected. For instance, the question regarding distribution of all wholesale sales by outlet has evolved to parallel structural changes in the industry. In the first survey, nursery managers were asked to report the percent of total sales at retail and wholesale, and information about the share of sales to their six leading states for re-wholesalers, retail outlets, and landscape firms. In the second and third surveys, respondents were asked to report the distribution of wholesale sales among mass merchants, garden centers, other retailers, landscapers, and re-wholesalers. However, for the fourth survey it was determined that further refinement would provide better information. Wholesale sales were separated into mass merchandisers (general merchandise stores, supermarkets, etc.), home centers (home improvement, building supply outlets, hardware, etc.), garden centers (single locations), garden centers (multiple locations), landscape firms (in-house or external), and re-wholesalers (brokers, other growers, etc.). Also, previously used questions about percentages of wholesale sales to each nurseries' five most important states by each type of outlet category were removed from this fourth survey to simplify. One new question asked for information about intrastate wholesale sales, and another asked for the top states as source states for plant material.

The overall response rate for the usable returned questionnaires was 15.9 percent (Table 2). The distribution of the 2,485 respondents ranged from as few as 11 for Nevada to 476 in Florida. Based on the percentage of questionnaires sent, the lowest state was Texas with 9.0 percent response rate, while the highest response rate occurred with North Dakota, 39.4 percent. As expected, some nurseries in the sample had ceased to exist, and others wrote back with explanations as to why they had bothered to obtain a certified license in their state even though their business operations were no longer active. Most of these indicated that they were essentially retired from being a commercially-active nursery.

The results from the survey are presented in this report in the order in which the questions appeared in the questionnaire. Only basic descriptive statistics are included in this report; however, subsequent reports will examine selected issues regarding possible regional or size-related differences among the respondents.

*See Table 2*

## **Year Established**

Solid growth in green-industry sales during the 1980s and 1990s is paralleled by the high percentages for new firms entering the nursery business during each of those decades. Entry of new firms into the nursery industry appears to be continuing into the 21<sup>st</sup> century, because during the first four years of this decade 16 of the 44 states included in this survey had growth in the number of new firms above ten percent (Table 3). Among these states, Missouri had the largest percentage (29.4 percent) of respondents who started their operations in the 2000's. Oklahoma was second with 26.7 percent, followed by Arkansas, South Carolina, and Kentucky with 25, 20.6, and 20 percent respectively. While these percentages may be influenced by response bias, they suggest that entry into the green industry still appears to be financially attractive. On the other hand, information about the number of firms that departed the industry is not available.

For the major production states, those with two percent or more of total U.S. cash receipts, N.J. and N.C. experienced their greatest growth in the 1970s. Five of these major states had their largest percent increase in firm numbers during the 1980s. Massachusetts was unique with only 1.1 percent of the sample established after 1989, and 33.3 percent dating before 1950, which was the largest share among these 44 states.

*See Table 3*

## **Permanent and Temporary Employees**

Respondents were asked to give the number of employees, both permanent and temporary, employed by their firm at this location. The overall response rate to this question ranged from the low in Delaware (64%) to 100 percent of respondents in seven states. Also, they were asked to indicate how employment numbers have changed over the past five years and the percentage increase or decrease. The states with the highest averages of permanent employees per firm are Oklahoma, Texas, and California, with 59.3, 23, and 22.7, respectively (Table 4). On the low side, the averages for Vermont, Delaware, and Wyoming were 1.9, 2.3, and 2.4, respectively. The states with the highest average number of temporary employees per firm were Connecticut, Massachusetts, and Oklahoma with 27.3, 25.5, and 22.3, respectively.

The third and sixth columns in Table 4 present the percentages regarding the respondents providing numbers for permanent and/or temporary employees. For example,

in Georgia 92.9 percent of the respondents from that state provided an answer to this question, and 100 percent of those nursery operators provided numbers about permanent employees, and 76.9 percent reported having temporary employees.

*See Table 4*

With respect to employment, respondents were also asked to indicate whether the number of permanent and temporary employees increased, decreased, or remained the same over the past five years and the percentage of change if a change was noted. Connecticut respondents had the largest percentages for increases in both permanent and temporary employees, 47.4 and 55 percent, respectively (Table 5). In 38 states, the average percentage of firms increasing permanent employees equaled or exceeded the percentage indicating a reduction. For temporary employees, all but one state indicated greater percentages for increasing numbers versus decreasing employment.

*See Table 5*

### **Computer Use by Nursery**

Respondents were asked to indicate whether they currently use, or planned to use within the next five years, each of 12 different functions that involved a computer in their nursery operations. If the appropriate spaces beside a function were left unchecked, the blank was interpreted to mean the function was not currently used and that the respondent did not plan to begin using a computer for that function during the next five years.

#### Word Processing

Word processing is the leading function for which nursery professionals use a computer. Overall, 65.8 percent of the respondents reported word processing as a current computer activity (Table 6). Only one state in the 2004 survey had less than 50 percent of the respondents indicate word processing as a current computer activity. Eleven states currently have 80 percent or higher use of word processing among the respondents. The range of current use of word processing ranged from a low of 36 percent in Delaware to a high of 100 percent in Nevada. The top states with nursery professionals planning to use word processing in the next five years were New Mexico (11.8%) and Wyoming at (8.3%).

#### Accounting/Cost Analysis

The leading states with computer use for accounting/cost analysis include Colorado (94.1%), Minnesota (81.6%), and Idaho (78.6%). Also, there are ten other states that have

70 percent or higher current uses of computers for accounting/cost analysis. The top states with nursery professionals planning to use computers for accounting/cost analysis in the future are Rhode Island (16.7%) and Maine (15.2%).

### Inventory

Among all respondents, 40.5 percent reported use of computers for inventory control. Three states have current-use percentages above 60 percent - Colorado (70.6%), Connecticut (60.9%) and Minnesota (65.8%). However, there are six states that have percentages of planned future use for inventory purposes ranging from 20.8 percent to 25.0 percent.

### Financial Investment/Analysis

The most frequent computer use for financial investment/analysis was reported by respondents in Nevada (54.6%), Minnesota (44.7%), and Colorado (41.2%). Eleven other states had 30 percent or higher use of computers for financial investment/ analysis. The industry average of 25.5 percent reveals the relatively lower use of computers for this activity versus the three uses discussed above. The top states with nursery professionals planning to use computers in the near future for financial investment/analysis are Washington (20.8%) and Nebraska (20%).

### Internet Commerce

Computer use for internet commerce is, on average, almost identical to that for financial investment/analysis. There are three states that have much higher than average use of internet commerce, Hawaii (57.1%), Montana (45.5%), and Massachusetts (44.4%). Respondents in Colorado at 23.5 percent and in Vermont at 25.0 percent topped the other states regarding the intention to begin internet commerce during the next five years.

### CDs For Marketing

Only 6.8 percent of all respondents noted their current use of computers for making CDs to use as a marketing tool. Montana was highest with a positive response rate of 27.3 percent. And, 23.5 percent of Colorado's respondents and 21.4 percent in Hawaii planned for future use of this marketing tool.

### Communications/E-Mail

This particular computer use was second in frequency behind word processing. Overall, 59.9 percent of the respondents currently used computers for this purpose. Nursery

professionals in Colorado, Connecticut, Hawaii, Idaho, Kentucky, Minnesota, Mississippi, Montana, Nevada, New Hampshire, New Mexico, Oregon, Texas, Virginia, and Washington were above 70 percent for respondents indicating they currently use E-Mail. Colorado and Hawaii were above 90 percent.

#### Landscape Designing

On average, only 7.8 percent of the total sample indicated current use of computers for aid in landscape design services. The four states with the highest usage levels were Iowa (20.8%), Minnesota (21.1%), Montana (18.2%), and North Dakota (30.8%).

#### Production Scheduling

Twelve of the 44 states had 25 percent or more of the surveyed firms report the use of computers for assistance in production scheduling. Montana and Utah were tied for the highest percent of respondents who used computers for this activity, 45 percent. Interest in future use for this activity was fairly low, only 7.6 percent of the total sample indicated they planned to begin use of computers for production scheduling in the next five years.

#### Greenhouse Production Controls

Reported use of computers to monitor greenhouse production controls was highest for Mississippi (36.4%) followed by Montana (26.3%). Thirteen other states had percentages ranging from 11.2 to 21.4 percent. Planned future use indicated limited expectations of using computers for this activity because overall only 6.8 percent of all respondents checked the space declaring a plan to begin using computers for this activity some time during the next five years.

#### Digital Imaging

A new application of computers is the ability to process digital images for diagnostic and/or marketing purposes. For the entire sample, 3.7 percent reported the current use of digital imaging in their business operations. Another 5.3 percent indicated the intention of using digital images within the next five years. Texas with 10.6 percent and Mississippi with 10.5 were the top states, with respect to relative frequency for this activity. New Hampshire respondents yielded the highest percentage for intended future use (18.8%).

#### Bar Coding

Bar coding is also a relatively new computer activity for nursery professionals. Overall, 10.1 percent of the respondents used this function in 2003, and 7.2 percent plan to

begin within the next five years. Three states had relative frequencies more than double the overall average- Connecticut (21.7%), Montana (27.3%), and Oklahoma (26.7%).

*See Table 6*

### **Distribution of Sales by Plant Category**

Respondents were asked to indicate the percentage distribution of their sales by plant category. They were also asked to report their dollar sales. The percentage distribution of sales was weighted by the respondent's dollar sales. The leading category of nursery sales was deciduous trees (13.6%) for all respondents in the survey (Table 7). It was the lead category in 16 states and was ranked second in five states. The highest percentages for individual states were reported in Kentucky and New Mexico with 44.0 and 43.7 percent, respectively, of total sales accounted for by the deciduous tree category. Other states with 30 percent or more of the total sales in this category included Colorado, Indiana, Iowa, Nevada, South Dakota, and Tennessee.

The second leading plant category for the entire sample was herbaceous perennials, which accounted for 8.5 percent of sales. This was the leading sales category for nursery professionals in Connecticut (28.3%), Michigan (13.4%), New Jersey (32.1%), South Carolina (66.3%), and Vermont (22.3%).

The third leading category for the 44 states included in the survey was evergreen trees. While the overall 44-state average share of total sales was 8.2 percent, North Dakota led this category with 30.1 percent of sales followed closely by Indiana (28.8%). As in the previous surveys, the Florida industry continued to be dominant in tropical foliage with 11.6 percent of sales in this category.

In the other plant categories shown in Table 7, various states yielded some substantially higher than average percentages. Hawaiian sales were dominated by the flowering potted plant category, accounting for 80.3 percent of total nursery sales. In the Christmas tree category, Mississippi had 65.4 percent of sales, West Virginia had 44.4 percent of sales, and Delaware was a distant third with 12.2 percent. Tennessee nursery sales in the tree fruit category accounted for 18.1 percent of that state's nursery sales, which is four times greater than the second place state of Florida with 4.4 percent. However, on a dollar rather than a percentage basis, Florida's 4.4 percent of 1.6 billion dollars is greater than 18.6 percent of 280 million dollars (Table 1). The variation in percentages in this table

suggests the nursery industry is diversified by plant category across the states.

New Hampshire and Delaware stood out from the other states regarding the percentage of sales in the propagated material category. For New Hampshire, this category accounted for nearly half of the sales (45.9%). In Delaware the percent of sales from propagating material was reported at 18.1 percent. Louisiana's leading category was vines and ground covers with 17.4 percent of sales. This was second place categories for Georgia with 13.5 percent.

The catch-all category of "other" yielded some high percentages. Four states had sales shares for this category above 20 percent - Arkansas (25.4%), North Carolina (22.2%), South Dakota (22.4%), and Utah (26.3%). Items listed by nursery professionals for this "other" category included sod, speciality grasses, cut flowers, orchids, hardscape items, palms, and some specific crop items like aquatic plants.

*See Table 7*

### **Sales of Native Plants**

Native plants were defined in the survey questionnaire as those present in a state before European settlement. This question simply asked for the percent of total sales of native plants. Annual sales values provided by the respondents were used to weight the sales percentages reported for this question. For the total sample, 13.2 percent of total sales were accounted for by native plants in 2003 (Table 8).

State with large shares of total sales from native plants include Arkansas (48.9%), Minnesota (35.2%), and West Virginia (40.4%). Seven states had percentages from 20 to 26.8, including Delaware, Iowa, Montana, Ohio, Tennessee, Texas, and Utah. At the low end, Hawaii reported 0.2 percent, New Hampshire 2.0 percent, and Oklahoma 2.5 percent.

*See Table 8*

### **Irrigation Water**

A new section added to this fourth nationwide survey inquired about sources of irrigation water and changes in water use over the past five years. The categories of sources of irrigation water were natural surface, recaptured, city, or a well. A follow-up question asked whether use of irrigation water over the past five years on a per-acre basis increased, remained the same, or decreased. If there was a change, respondents were asked to provide a percentage estimate.

### Sources of Irrigation Water

Overall, 53.1 percent of all respondents' irrigation water was supplied by wells (Table 9). Natural surface water supplied 24.3 percent. While recaptured water was the source for only 10.1 percent of irrigation water for all respondents, it was an important source in Hawaii (76.0%) and Virginia (41.1%). City water supplied 50.1 percent of the water for the surveyed California nurseries and 77.7 percent for respondents in South Carolina. Massachusetts had the most even distribution of water supply from the four sources - well (46.6%), natural surface (21.0%), recaptured (17.8%), and city (14.7%).

*See Table 9*

### Change in Use on Per-Acre Basis

The proportion of firms reporting no change in water use over the past five years ranged from 45.8 percent in Nebraska to 90 percent Wyoming (Table 10). Among the states with larger percentages of firms increasing water use, Nebraska, Nevada, and New Hampshire were at the top with 45.8, 40.0, and 43.8 percent, respectively. However, the percent increase varied considerably from 38.0 percent in Nebraska to 160.0 percent in Nevada. Top states that had a decrease in their water use among their firms include Colorado (29.4%) and New Mexico (23.5%). In general, it is apparent that the majority of firms held water use on a per-acre basis constant, while more of the remaining share of firms increased rather than decreased water use.

*See Table 10*

### **Integrated Pest Management Practices**

Twenty-two Integrated Pest Management (IPM) practices were listed in the latest survey questionnaire (Table 11). Respondents were asked to indicate which practices they currently used in their nursery. Overall, the six dominant practices were to: 1) remove infested plant material (87.8%), 2) use of cultivation/hand weeding (76.8%), 3) spot treatment with pesticides (73.0%), 4) inspect incoming stock (72.0%), 5) alternate pesticides to limit chemical resistance (62.6%), and 6) elevate or space plants for air circulation (60.2%). However, there were several practices that were used infrequently, such as use of sanitized foot baths (2.3%), soil sterilization (9.7%), and treatment of retention ponds (4.8%).

*See Table 11*

## **Root Media**

Sale of container-grown products was the dominant root packing category in 35 of the 44 states in the survey with an overall weighted average percentage distribution of 63.3 percent (Table 12). For 31 states it was the largest percentage category and there were four states for which it was slightly larger. Balled and burlapped was a very distant second with an overall percentage of 16.3 percent. There were four states in which it was the largest form: Rhode Island (60.8%), Ohio (52.5%), Kentucky (50.8%), and Colorado (47.1%). The “other” category in Minnesota, South Dakota, and West Virginia accounted for 61.6, 27.2, and 41.6 percent, respectively. In Iowa, Montana, and South Carolina, the dominant category was bare-root. The final category of “processed ball” was insignificant in all but one state, South Dakota.

*See Table 12*

## **Sources of Seedlings, Liners, Whips, Grafts, Tissue Culture Plantlets, Cuttings or Plugs**

Respondents among the 44 states included in this survey, 14 had purchased more than 50 percent of their source material (seedlings, whips, grafts, and liners) from other nursery operations in their home state (Table 13). These percentages are simple unweighted averages of the values reported by the respondents because the dollar value of these source purchases was not obtained. Florida, Oregon, California, and Hawaii ranked at the top with 87.3, 77.0, 74.3, and 70.4 percent, respectively. While purchasing most of their source material within their home state, Oregon, Florida, and California were also identified as a source state for propagating material by nursery professionals in 38 or more of the 44 surveyed states.

Slightly less than half of the surveyed respondents by state purchased source material from Canada (CN). Maine is the state with the highest Canada percent (9.9%). Twenty-four of the states reported propagating-material purchases from other countries than Canada. Hawaii has the highest value, 27.8 percent, followed by New Hampshire, Florida, and Maine with 7.9, 5.7, and 4.6, respectively. For the 31 reported countries, the frequency of identification ranged from only one respondent citing a foreign source country to 47, 32, and 30 respondents identifying Costa Rica, Guatemala, and Holland, respectively.

*See Table 13*

## Transaction Practices

### Trade Shows

Among the 44 states included in the survey, Michigan nursery professionals reported the largest average participation with an exhibit at trade shows with 4.8 annually (Table 14).

However, this simple average was skewed a little bit by the maximum number of trade shows attended being reported as 85 by one nursery respondent, which seems unrealistic. The next highest state was Massachusetts with an average of four trade shows per year. Three other states had average attendance numbers greater than three per year - Oregon with 3.6, Oklahoma with 3.4, and Minnesota with 3.3. The states with the lowest average attendance at trade shows with an exhibit were Arkansas and Wyoming with an average of 0.4 and 0.3 per year, respectively.

Among the 44 states, 16 had higher average attendance numbers for participating at trade shows without an exhibit than attendance numbers with an exhibit. The highest state averages occurred in New Hampshire with 2.9, closely followed with a 2.7 average number for Rhode Island.

*See Table 14*

### Sales to Repeat Customers

Respondents in 23 states reported making at least 80 percent of their annual sales to repeat customers (Table 15). For the remaining 21 states, only one had a state averaged below 60, and that occurred in South Dakota with 57.1 percent. Connecticut had the highest percent of respondents (92.1%) with sales to repeat customers. The average value for all respondents was 81.8 percent. Massachusetts's average value of 68.2 percent seems inconsistent since the industry in that state is dominated by older firms

*See Table 15*

### Discounts Published

Nursery professionals in the major production states (with respect to total annual cash receipts) were less likely to have published discount information than nursery managers in the other states (Table 16). California, Florida, and Texas respondents reported that slightly less than 20 percent of their nurseries published discount information. Conversely, at least one-third of the nursery professionals in Colorado, Hawaii, Massachusetts, Minnesota, Oklahoma, South Carolina, Utah, and Washington published

discount information.

*See Table 16*

### Negotiated Nursery Sales

Negotiated sales were defined as “discussion or debate over price, quality or other terms of sale.” For the entire sample, the average weighted percentage of sales was 25.9 percent (Table 17). Nursery professionals in four states reported that more than half of their annual sales were discounted in 2003. Oklahoma was at the top with 60.5 percent, followed by Texas, Tennessee, and Connecticut with 56.5, 51.5, and 50.8 percent, respectively. For sixteen states, the reported share of total annual sales that were negotiated was less than 10 percent. The lowest rates came from Rhode Island, North Dakota, and Delaware with 4.0, 4.4, and 4.6 percent, respectively.

*See Table 17*

### Distribution of Sales by Transaction Method

The weighted average distribution of sales by trade show orders, telephone orders, in-person orders, mail orders, and internet sales are presented in Table 18. Trade show orders, mail orders, and internet sales combined accounted for 10 percent of total sales for the entire sample. West Virginia had the highest share of sales via trade show orders (17.1%). Three states followed with slightly more than 8 percent each, New Jersey, North Carolina, and Virginia. At least one operator in every state had some sales reported at trade shows.

The percentage of mail order sales was low in most states. Montana nursery professionals reported that 35.6 percent of annual sales in 2003 were by way of mail orders. Nearly tied for second place was Arkansas and South Carolina with 21.0 and 19.3 percent, respectively. While the share of total sales for all respondents was the lowest for the internet method, Connecticut's share was calculated to be 24.6 percent, and New Hampshire's share was 13.8 percent.

*See Table 18*

### **Advertising Expenditures**

The weighted average percent of total sales allocated to advertising ranged from 0.6 percent in Hawaii to 15.3 percent in Mississippi (Table 19). For the 44 states combined, the average percent of sales spent for advertising was 3.6 percent. Aside from Hawaii, there

appears to be a cluster of a few states with higher average responses (Pennsylvania, Rhode Island, and Tennessee). The majority of the states had very similar averages.

*See Table 19*

### **Distribution of Advertising Dollars**

The two major advertising categories for the sample as a whole are trade shows and catalogs, accounting for 25.6 and 22.5 percent, respectively (Table 20). The catch-all category of “other” was so large that after examination of the other activities listed, “newspaper” was separated out to form a separate advertising outlet. As such, newspapers received an average of 6.9 percent of the total 44-state advertising dollars. After removing newspapers from the “other” category, it accounted for 9.8 percent of the overall 2003 advertising expenditures. In some states, the “other” category still accounted for more than a fifth of the advertising expenditures. Mississippi’s “other” category accounted for 78.7 percent of respondents’ advertising expenditures. Four more states had fairly high levels of reported activities in this “other” category. The reported values in Delaware, Georgia, Texas, and Washington ranged from 20.3 to 34.3 percent. Examples of some activities noted by nursery professionals in this “other” category are: direct mail, promotional items, point-of-purchase material, travel, donations, association fees, and plant tags.

Among the major production states, the newsletter was the leading outlet with a 35.0 percent share of the annual advertising budget in California, while trade shows at 43.2, 43.1, 31.4, and 36.0 percent was first in Texas, Florida, Oregon, and North Carolina, respectively. Michigan respondents’ top category was catalogs, accounting for 27.6 percent. Radio and TV were the dominant outlets in Missouri, North Dakota, and South Dakota. In Kentucky and Utah, the yellow pages was the top outlet. Hawaii had the highest relative frequency, weighted by total sales, for web site advertising (22.9%). The newsletter was the dominant category Montana, with a reported 34.9 percent of the 2003 advertising budget.

*See Table 20*

### **Distribution of Sales as Retail and Wholesale**

Nursery professionals were asked to indicate the percentage of their wholesale sales among six categories. Most respondents (93.9%) answered this question (Table 21). Only 6 of the 44 states had a response rate below 90 percent, and nine had 100 percent. Overall,

80.4 percent of sales were classified as wholesale. Seven states, Colorado, Georgia, North Carolina, Oklahoma, Oregon, Rhode Island, and Tennessee had at least 90 percent of sales in the wholesale category. There were eleven states with more than 60 percent of sales in the retail category. The highest percentage retail states were South Dakota, Nebraska, and Mississippi for which retail sales accounted for 84.4, 82.8, and 80.3 percent, respectively.

Another motivation for this question was to estimate the shares of firms that made wholesale and/or retail sales. The 44-state average of 75.7 percent means three-fourths of the respondents made some wholesale sales, and 58.7 percent of all the firms made some retail sales. Twenty-two states had a greater percentage, or equal percentage, of firms making retail sales than wholesale; however, none of these states was among the top 10 production states with respect to total sales.

*See Table 21*

### **Distribution of Wholesale Sales by Outlet Category**

Respondents were asked to provide the distribution of their annual wholesale sales among five outlet categories: mass merchandisers (general merchandise stores, supermarkets, etc.), home centers (home improvement, building supply outlets, hardware, etc.), garden centers (single location), garden centers (multiple locations), landscape firms (in-house or external), and re-wholesalers (brokers, other growers, etc.). Two rather major adjustments in the way this question is organized from the wording in the 1998 nationwide survey involved the mass merchant category and garden centers. The home center category was new, and designed to capture sales previously placed into the mass merchandiser category. Also, a category in 1998 that was termed “other retailers” was removed for the 2003 survey. The garden center category was separated into two classes, those with a single location and those with multiple locations.

Overall, the 44 state average values for the distribution of wholesale sales among the five categories placed landscapers at the top with 33.9 percent (Table 22). Second in terms of share of total weighted sales was the re-wholesaler category with 25.9 percent. Single-location garden centers accounted for 15.2 percent, home centers 10.9 percent, mass merchandisers 8.5 percent, and multiple-location garden centers the remaining 5.6 percent of weighted wholesale sales.

#### **Mass Merchandisers**

Among the respondents in the 44 surveyed states, nursery professionals in nine states reported sales to mass merchandisers accounted for more than ten percent of all wholesale sales. Connecticut, South Carolina, and Texas were at the top with sales values of 25.5, 22.2, and 20.0 percent, respectively. Although the share values regarding sales was 8.6 percent in Hawaii and 10.8 percent in Washington, the share of firms making sales to buyers in this category was fairly high, 35.7 and 25.0 percent, respectively.

### Home Centers

For six states, this outlet category was quite important. Connecticut was highest with 36.7 percent, followed by California with 34.7 percent, and at a close third was Georgia at 32.3 percent. The other three states with substantial market shares through home centers were Texas (28.9%), Tennessee (20.3%), and New York (18.9%). The only states where more than 20 percent of the firms were attributed to this category are Connecticut (21.7%) and North Dakota (23.1%).

### Garden Centers

Looking at sales to single-outlet versus multiple-outlet garden centers reveals the importance of the single outlet category. Fourteen states had outlet share values above 20 percent. In West Virginia the sales to single-outlet garden centers accounted for 54.8 percent of all wholesale sales in 2003. Four more states had percentages ranging from 34.0 to 38.8 percent- Mississippi, New Jersey, North Dakota, and Oklahoma. In the lead production states, California, Florida, and Texas, the share of annual sales to single-outlet garden centers were 9.3, 11.8, and 9.1 percent, respectively. However, the percent of firms making sales to this outlet category involved roughly one-third of the respondents in these states. In fact, the proportion of firms making sales to single-firm garden centers was 50 percent or more in eight states.

Total sales to multiple-outlet garden centers was approximately one-third of the volume to single-outlet garden centers, 5.6 percent. The share of sales was above 10 percent in five states- Arkansas (13.4%), Idaho (11.3%), Ohio (13.9%), Oklahoma (12.7%), and Pennsylvania (11.9%).

### Landscape Firms

Sales to landscape firms averaged 33.9 percent among the respondents participating in the survey. The share of wholesale sales accounted for by this outlet category ranged

from 0.4 percent in Hawaii to 86.5 percent in Colorado. Twelve more states had values greater than 60 percent. California and Florida had values slightly lower than the overall average, 26.4 and 28.8 percent, respectively. The third leading production state, Texas, had an outlet share value relatively low, 18.6 percent, while North Carolina wholesale sales to landscape buyers was above average, 42.9 percent. The second lowest percentage value occurred with Oregon, 7.1 percent.

### Re-Wholesalers

The re-wholesaler category accounted for 25.9 percent of all wholesale sales. The unique position of Hawaiian nursery professionals is evident in the high market share value for the sales of product to re-wholesalers, 94.9 percent. The only other state with a value above 50 percent is Montana, with a distribution value of 58.4 percent. Among the top-five production states, Oregon respondents reported that re-wholesalers accounted for almost half, 48.7 percent, of wholesale sales in 2003. The other four top-five production states had percentages ranging from 12.7 percent in North Carolina to 34.1 percent in Florida.

*See Table 22*

### **Export Market Sales**

Among all respondents, 8.3 percent indicated that some of their sales were to customers outside of the United States (Table 23). The share of total sales to the export market was reported to account for 1.8 percent of total annual sales in 2003. The leading state with respect to the number of nurseries involved in export sales is Hawaii (28.6%). However, only 0.7 percent of Hawaii's 2003 sales were made to other countries. Oregon and Washington also had relatively high numbers of firms with export sales, 25.0 and 20.8 percent, respectively. The state with the greatest share of annual sales to the export market was Montana, 8.2 percent. Florida and Oregon were the only top-ten states with sales shares of 5.0 and 5.5 percent, respectively. In California, 11.1 percent of respondents indicated making export sales, but these sales accounted for only 1.0 percent of the state's total. The results suggest that most states had nurseries that exported, but they were not major sources of revenue.

*See Table 23*

### **Distribution of Wholesale Sales by State**

In the three previous nationwide surveys conducted by S290 (formerly S103),

respondents were asked to estimate the distribution of wholesale sales to their top five states for each of the wholesale categories presented in table Q18. For this fourth survey, the decision was made to simplify this request and merely ask nursery professionals to report the share of wholesale sales to their top five states for all wholesale sales in 2003 (Table 24). Sales not reported as going to a top-five state fell into a catch-all category noted as “all other out-of-state sales combined.” The home state of the nursery was listed as the first option for a destination state since this was the dominant practice of all states in previous surveys. Hence, readers should be aware that a state may have received shipments and appear without any entry in Table 24, which would be the case whenever none of the respondents noted that state as a top-five state.

In most cases, the weighted percent of sales to buyers within the nursery’s home state were by far the largest (Table 24). The overall 44-state average share of wholesale sales to buyers within the home state was 78.5 percent. Colorado and Maine were at the top with 96.1 and 93.2 percent, respectively, of sales shipped to buyers within their state. For Maine, only one state received a share of weighted sales greater than one percent, which was 2.3 percent for New Hampshire. Colorado reported one state as receiving more than one percent, 1.5 percent for sales to Wyoming. On the other end of the distribution, Hawaii and Tennessee depended on sales to outlets within their home states less than the other surveyed states. Hawaii shipped 42.7 percent of sales to buyers within Hawaii, and 59.8 percent of Tennessee sales were to buyers inside of Tennessee. For Hawaii, California buyers received 15.4 percent and Florida buyers accounted for 13.9 percent. Tennessee growers’ top states were Ohio at 4.4 percent of annual sales and Georgia with 5.0 percent.

New York was identified as one of the top-five states by nursery professionals in 31 of the 44 surveyed states. Other destination states, ranging in numbers from 19 to 23 as a top-five state, included California, Colorado, Florida, Illinois, Massachusetts, Michigan, and Ohio. Obviously, states with considerable population numbers are important destination states.

*See Table 24*

### **Handled or Resold Plants for Other Growers**

Respondents were asked to indicate if they handled/resold plant material for other

growers. On average for the total sample, 45.9 percent of respondents said yes to this question (Table 25). The variation among states was relatively low. Thirty-two states had positive responses that ranged between 36 and 56 percent. Rhode Island was at the top with 75.0 percent of the nursery professionals indicating they did handle and/or resold material for other growers. At the other extreme, 28.0 percent of respondents in Delaware performed this activity. Average weighted sales percentages ranged from 16.1 percent in Washington to 81.3 percent in Nevada. These percentages of wholesale sales via this activity need to be considered with the insight that the sales percentage was weighted by the annual wholesale sales for the year of just those operations that made sales this way. Therefore, the 31.4 percent share of total sales in California from material handled for other growers represents the total sales of the 52.4 percent of California respondents answering this question.

### **Contract Sales**

Overall, 28.9 percent of respondents indicated that they made sales in 2003 via contracts, i.e., products sold or committed before being planted/potted (Table 25). Interestingly, the overall average value for the share of sales was 36.1 percent. In Hawaii, while only 14.3 percent of the respondents indicated that they made sales with contracts, this approach accounted for 98.0 percent of all wholesale sales for these particular operations. At the other extreme is Rhode Island with 8.3 percent of firms making sales via contracts, and among this small group the share of their total annual wholesale sales was only 5.0 percent.

*See Table 25*

### **Factors Important to Price Determination**

Nursery professionals were asked to indicate the importance of eight factors regarding the level of importance to them in determining product price (Table 26). A scale of 1 to 4 was used with 1 indicating “not important” and 4 indicating “very important.” For all respondents the most important factor was cost of production, 3.5, followed closely by grade of plant, 3.4. Market demand was third at 3.2 and then product uniqueness with a 3.0 rating. Other growers’ prices, inventory level, and last year’s price had ratings of 2.9, 2.6, and 2.5, respectively. The least important factor among the eight included in the questionnaire was inflation with a 2.2 rating. Among the 44 states there appears to be considerable

consistency in the ratings of these eight factors.

*See Table 26*

### **Factors Important to Geographic Expansion**

Respondents were asked to rate factors that might limit the expansion of the geographic scope of their trading area (Table 27). On average for all respondents, none of the factors received an average score above 2.9, which was the rating for “production.” An almost equal value, 2.8, was reported for personnel, and marketing as a factor was third in importance with a 2.7 rating. Debt capital, equity capital, transportation, and plant offering were all rated equal in importance with a 2.5 overall value.

*See Table 27*

### **Factors Impacting Nursery Business**

Thirteen factors that might impact a nursery business were listed in the questionnaire with instructions to rate each factor according to its importance, using a 1 to 4 scale with 1 representing not important and 4 if the factor is very important (Table 28). The response rate for this question was 94.1 percent, with the lowest response being 80.0 percent for Oklahoma and 11 other states at 100 percent. On average for all states, market demand and weather uncertainty topped the list with ratings of 3.3 and 3.1, respectively. Falling below 3, but in third place regarding its numerical rating, was own management expertise at 2.8, closely followed by labor at 2.7, and competition/price undercutting and ability to hire competent hourly employees tied at 2.6. The remaining five factors on the list were water supply (2.5), land and environmental regulations (2.4), and finally debt capital and ability to hire competent management tied (2.3)

*See Table 28*

### **References**

- Brooker, John R. and Steven C. Turner, *Trade Flows and Marketing Practices within the United States Nursery Industry*, Sou. Coop. Series Bull. 358, Published at The Univ. of Tenn. Agri. Exp. Sta. for Southern Regional Research Project S-103, October 1990.
- Brooker, John R., Steven C. Turner, and Roger A. Hinson, *Trade Flows and Marketing Practices within the United States Nursery Industry: 1993*, Sou. Coop. Series Bull. 384, Published at The Univ. of Tenn. Agri. Exp. Sta. for Sou. Regional Research

Project S-103, 1995.

Brooker, John R., Roger A. Hinson, and Steven C. Turner, *Trade Flows and Marketing Practices within the United States Nursery Industry: 1998*, Sou. Coop. Series Bull. 397, Published at The Univ. of Tenn. Agri. Exp. Sta. for Sou. Reg. Res. Project S-290, 2000.

USDA, *Floriculture and Nursery Crops Situation and Outlook Yearbook*, FLO-2004, Economic Research Service/ USDA, Washington, D.C., June 2004.

**Appendix - Questionnaire**

**GENERAL INFORMATION**

1. From what state are you reporting? \_\_\_\_\_ Your ZIP code \_\_\_\_\_  
 Does your business operate a nursery in another state?  
 \_\_\_\_\_ yes \_\_\_\_\_ no

If yes, please list the state(s)

2. In what year was your firm established?

3. How many people does your firm employ at this location?

Permanent employees

Temporary employees \_\_\_\_\_ (average number during your peak season)

Has the number of employees over the last five years?

Permanent: \_\_\_ increased, \_\_\_ stayed the same, \_\_\_ decreased.

Temporary: \_\_\_ increased, \_\_\_ stayed the same, \_\_\_ decreased.

If employment has changed, indicate by what percent?

Permanent \_\_\_\_\_ % Temporary \_\_\_\_\_ %

4. What functions of your firm are computerized?

Function	Using computer for task now	Planned within next five years
	(please check if yes)	
Word processing	_____	_____
Accounting / cost analysis	_____	_____
Inventory	_____	_____
Financial investments / analysis	_____	_____
Internet commerce (B2B or B2C)	_____	_____
CDs for marketing	_____	_____
Communications - E-mail	_____	_____
Landscape designing (CAD)	_____	_____
Production scheduling	_____	_____
Greenhouse production controls	_____	_____
Digital imaging for disease diagnosis	_____	_____
Bar coding	_____	_____
Other (please list)	_____	_____

**PRODUCTION**

5. What percentage of your sales are in these plant categories?

- \_\_\_\_\_ % Deciduous shade and flowering trees
- \_\_\_\_\_ % Deciduous shrubs
- \_\_\_\_\_ % Broad-leaved evergreen shrubs (excluding Azaleas)
- \_\_\_\_\_ % Narrow-leaved evergreen shrubs
- \_\_\_\_\_ % Evergreen trees
- \_\_\_\_\_ % Azaleas
- \_\_\_\_\_ % Vines and grounds covers
- \_\_\_\_\_ % Roses
- \_\_\_\_\_ % Herbaceous perennials
- \_\_\_\_\_ % Bedding plants - flowering annuals
- \_\_\_\_\_ % Bedding plants - vegetables, fruits, and herbs
- \_\_\_\_\_ % Flowering potted plants
- \_\_\_\_\_ % Christmas trees (live or cut)
- \_\_\_\_\_ % Tree fruits
- \_\_\_\_\_ % Foliage
- \_\_\_\_\_ % Propagated material (liners, cuttings, plugs, etc.)
- \_\_\_\_\_ % Other
- 100 % Total

6. What is your firm's source of irrigation water?

- \_\_\_\_\_ % Natural surface
- \_\_\_\_\_ % Recaptured
- \_\_\_\_\_ % City
- \_\_\_\_\_ % Well
- 100 % Total

7. Has your use of irrigation water on a per acre basis changed over the past five years?

\_\_\_ increased, \_\_\_ remained the same, \_\_\_ decreased.

If irrigation water has changed, indicate by what percent? \_\_\_\_\_ %

Irrigation methods used? \_\_\_ Overhead      \_\_\_ Drip

      \_\_\_ Subirrigation (Ebb / flood)

      \_\_\_ Other

8. Please place a check mark beside each of the following IPM activities that you practice.

yes ✓	Activity	yes ✓	Activity
	Remove infested plants or plant parts		Inspect incoming stock
	Alternate pesticides to avoid chemical resistance		Manage irrigation to reduce pests
	Elevate or space plants for air circulation		Spot treatment with pesticides
	Use cultivation, hand weeding		Ventilate greenhouses
	Disinfect benches/ground cover		Use of beneficial insects
	Use sanitized water foot baths		Keep pest activity records
	Soil solarization/sterilization		Adjust fertilization rates
	Monitor pest populations with tarp or sticky boards		Use screening/barriers to exclude pests
	Adjust pesticide application to protect beneficials		Use biopesticides/lower toxicity
	Use mulches to suppress weeds		Treat retention pond water
	Beneficial insect identification		Use pest resistant varieties

9. Considering all plants sold by your firm, what percentage of your sales are in these forms?

Percent of Sales	Method Used
_____ %	Bare root
_____ %	Balled and potted
_____ %	Balled and burlapped
_____ %	Processed balled
_____ %	Container
_____ %	Field grow bag
_____ %	In-ground containers (pot-in-pot)
_____ %	Other (please list) _____ (For example, cut Christmas trees,
100 %	Total

10. What are the top five states (or countries), including your own state, from which you purchase seedlings, liners, whips, grafted material, tissue culture plantlets, cuttings, or plugs?

Top five states or countries:	Percent of
1) Home state	_____ %
2)	_____ %
3)	_____ %
4)	_____ %
5)	_____ %
All other states combined	_____ %
	100 %

**SALES CONSIDERATIONS**

11. What percent of total sales is from native plants? \_\_\_\_\_ %  
 (Native plants are defined as those present in your state before European settlement)

12. At how many trade shows was your firm represented in 2003?  
 \_\_\_\_\_ With an exhibit  
 \_\_\_\_\_ Without an exhibit

13. What percentage of your sales are done with repeat customers? \_\_\_\_\_ %

14. Do you publish discount (price) information for large-volume purchases? \_\_\_\_\_ yes \_\_\_\_\_ no

15. What percent of your sales are negotiated sales?  
 (Negotiated means there was discussion/debate over price, quality or other terms of sale.) \_\_\_\_\_ %

16. What percentage of your sales transactions are made using the following methods

Percent	Method
_____ %	Trade show orders
_____ %	Telephone orders
_____ %	In-person orders
_____ %	Mail orders
_____ %	Internet sales
100 %	Total sales

17. What percent of your 2003 total annual sales are:

\_\_\_\_\_ % Wholesale  
 \_\_\_\_\_ % Retail  
 100 % Total

18. If you sell wholesale, what percentage of your wholesale sales (from question 17) are to:

\_\_\_\_\_ % Mass merchandisers (general merchandise stores, supermarkets, etc.)  
 \_\_\_\_\_ % Home Centers (home improvement, building supply outlets, hardware, etc.)  
 \_\_\_\_\_ % Garden centers (single location)  
 \_\_\_\_\_ % Garden Centers (multiple locations)  
 \_\_\_\_\_ % Landscape firms (in-house or external)  
 \_\_\_\_\_ % Re-wholesalers (brokers, other growers, etc.)  
 100 % Total

19. Do you export nursery products out of the U.S.?

\_\_\_\_\_ yes    \_\_\_\_\_ no

If yes, what percentage of total sales are from exports?

\_\_\_\_\_ %

If you export, please list the countries:

20. What are the top five states (or countries), including your own state, that are destinations for your firm's total sales?

Top five states or countries:	Distribution of
1) <u>Home state</u>	_____ %
2)	_____ %
3)	_____ %
4)	_____ %
5)	_____ %
All other out-of-state sales	_____ %
<b>Total =</b>	<b>100 %</b>

21. Do you handle/resell items from other growers?

\_\_\_\_\_ yes    \_\_\_\_\_ no

If yes, what percent of your total sales does this account for?

\_\_\_\_\_ %

22. What percentage of your total sales are on contract, in other words, sold or committed before being planted/potted?

\_\_\_\_\_ %

23. What types of buyer(s) are contracting for production with your firm?

\_\_\_\_\_ Other producers    \_\_\_\_\_ Retail garden centers

\_\_\_\_\_ Mass merchandisers    \_\_\_\_\_ Cooperatives

\_\_\_\_\_ Other (please specify)

**PRICE DETERMINATION**

24. Regarding price determination, please rate the level of importance of each factor by using the 1 to 4 scale, with 1= not important; 2= minor importance; 3= important; and 4= very important.

	1	2	3	4
Cost of production				
Inflation				
Other growers' prices				
Grade of plants				
Market demand				
Product uniqueness				
Inventory levels				
Last year's price				
Other (please specify)				

**FACTORS LIMITING EXPANSION**

25. Regarding factors that might limit the expansion of the geographic scope of your trading area, please rate the level of importance of each factor by using the 1 to 4 scale, with 1= not important; 2= minor importance; 3= important; and 4= very important.

	1	2	3	4
Debt capital				
Equity capital				
Marketing				
Personnel				
Production				
Transportation				
Plant offering				

26. Please rate each of the factors listed below according to how much they impact your business by using the 1 to 4 scale, with 1= not important; 2= minor importance; 3= important; and 4= very important.

	1	2	3	4
Weather uncertainty				
Land				
Market demand				
Labor				
Water supply				
Debt capital				
Equity capital				
Own managerial expertise				
Competition / Price undercutting				
Environmental regulations				
Other government regulations				
Ability to hire competent management				
Ability to hire competent hourly employees				

**ADVERTISING**

27. What percentage of total sales did your firm spend on advertising in 2003? \_\_\_\_\_ %

How do you allocate these advertising dollars?

- \_\_\_\_\_ % Web sites
- \_\_\_\_\_ % Yellow pages
- \_\_\_\_\_ % Radio / TV
- \_\_\_\_\_ % Billboards
- \_\_\_\_\_ % Gardening publications
- \_\_\_\_\_ % Catalogs (print or CD)
- \_\_\_\_\_ % Trade journals
- \_\_\_\_\_ % Newsletters
- \_\_\_\_\_ % Trade shows
- \_\_\_\_\_ % Other, please specify
- 100 % Total

28. What was the gross value of product sales from your nursery in 2003, or your most recently completed fiscal year? Please check the appropriate category below, or enter the value here \$\_\_\_\_\_.

- Less than \$249,999
- \$ 250,000 - \$ 499,999
- \$ 500,000 - \$ 999,999
- \$ 1,000,000 - \$ 1,999,999
- \$ 2,000,000 - \$ 2,999,999
- \$ 3,000,000 - \$ 3,999,999
- \$ 4,000,000 - \$ 4,999,999
- \$ 5,000,000 - \$ 9,999,999
- \$10,000,000 - \$14,999,999
- \$15,000,000 - \$19,999,999
- \$20,000,000 or above

**Table 1. Grower Cash Receipts for Greenhouse and Nursery Crops in 44 States**

State <sup>a</sup>	Grower Cash Receipts <sup>b</sup>	Share of U.S. Total <sup>b</sup>	State <sup>a</sup>	Grower Cash Receipts <sup>b</sup>	Share of U.S. Total <sup>b</sup>
	2003	2003		2003	2003
	\$1,000s	percent		\$1,000s	percent
Arkansas	51,931	0.4	New Hampshire	55,680	0.4
California	2,312,977	16.2	New Jersey	367,898	2.6
Colorado	243,838	1.7	New Mexico	60,804	0.4
Connecticut	239,442	1.7	New York	350,602	2.4
Delaware	33,700	0.2	North Carolina	944,554	6.6
Florida	1,601,040	11.2	North Dakota	9,915	0.1
Georgia	292,367	2.0	Ohio	551,734	3.9
Hawaii	93,067	0.6	Oklahoma	217,372	1.5
Idaho	71,265	0.5	Oregon	923,759	6.5
Illinois	288,951	2.0	Pennsylvania	401,606	2.8
Indiana	153,349	1.1	Rhode Island	30,560	0.2
Iowa	88,706	0.6	South Carolina	292,887	2.0
Kentucky	75,294	0.5	South Dakota	21,532	0.2
Louisiana	75,043	0.5	Tennessee	280,433	2.0
Maine	24,870	0.2	Texas	1,351,787	9.4
Massachusetts	133,585	0.9	Utah	122,139	0.9
Michigan	579,964	4.0	Vermont	19,050	0.1
Minnesota	189,584	1.3	Virginia	189,574	1.3
Mississippi	46,253	0.3	Washington	370,085	2.6
Missouri	98,546	0.7	West Virginia	Not available	--
Montana	32,508	0.2	Wyoming	6,545	<0.1
Nebraska	32,800	0.2			
Nevada	10,512	0.1	44 State Total	13,338,108	93.0

<sup>a</sup> States providing survey data for this study.

<sup>b</sup> *Floriculture and Nursery Crops Situation and Outlook Yearbook*, FLO-2004, June 2004, Economic Research Service, USDA

**Table 2. Nursery Population, Sample Size, and Survey Response**

State <sup>a</sup>	Respondents	Response rate	Population <sup>b</sup>	Sample Size <sup>c</sup>
	number	percent	number	number
Arkansas	28	23.1	121	121
California	126	12.5	2,512	1,004
Colorado	17	17.2	203	99
Connecticut	23	21.3	278	108
Delaware	25	19.1	131	131
Florida	476	16.7	7,703	2,854
Georgia	56	13.3	1,285	421
Hawaii	14	14.1	313	99
Idaho	14	12.2	287	115
Illinois	88	16.7	1,128	528
Indiana	34	17.2	437	198
Iowa	24	16.2	381	148
Kentucky	25	14.3	389	175
Louisiana	50	15.8	884	316
Maine	46	20.6	804	223
Massachusetts	18	17.8	182	101
Michigan	98	17.0	1,525	576
Minnesota	38	17.4	553	218
Mississippi	19	10.2	500	177
Missouri	17	11.9	576	143
Montana	11	22.9	49	48
Nebraska	25	17.2	362	145
Nevada	11	13.9	78	72
New Hampshire	16	28.6	58	56
New Jersey	64	14.4	961	443
New Mexico	17	17.0	175	100
New York	178	13.3	2,694	1,339
North Carolina	95	17.5	1,383	542
North Dakota	13	39.4	33	33
Ohio	121	20.6	1,434	586
Oklahoma	15	9.0	471	167
Oregon	148	24.7	1,790	599
Pennsylvania	156	14.6	2,704	1,072
Rhode Island	12	14.0	87	86
South Carolina	34	13.1	680	259
South Dakota	16	16.0	104	100
Tennessee	96	13.9	1,383	690
Texas	66	9.0	2,173	736
Utah	22	21.8	161	101
Vermont	16	15.8	214	101
Virginia	51	24.2	379	211
Washington	24	15.7	414	153
West Virginia	30	29.7	164	101
Wyoming	12	12.9	94	93
Total	2,485	15.9	38,237	15,588

<sup>a</sup> States providing survey data for this study.

<sup>b</sup> Compiled from lists of certified nurseries provided by Departments of Agriculture in each state.

<sup>c</sup> Where possible, sample size was based on a state's proportion of the population list - stratified by three size categories. In other states where size information was unavailable or nursery numbers considered small, the sample was based on a decision to strive to have adequate representation from that state.

**Table 3. Distribution of Nurseries by Year Established, 2003**

State	Before 1950	1950's	1960's	1970's	1980's	1990's	2000's
	percent						
Arkansas	7.1	7.1	3.6	17.9	14.3	25.0	25.0
California	11.9	2.4	4.8	14.3	16.7	36.5	13.5
Colorado	11.8	5.9	5.9	23.5	17.6	35.3	0.0
Connecticut	13.0	4.4	8.7	8.7	47.8	13.0	4.4
Delaware	8.0	12.0	8.0	16.0	20.0	20.0	16.0
Florida	6.7	2.9	4.0	15.1	30.3	28.4	12.6
Georgia	5.4	3.6	5.4	14.3	25.0	42.9	3.6
Hawaii	0.0	0.0	0.0	35.7	21.4	35.7	7.1
Idaho	0.0	0.0	7.1	14.3	28.6	42.9	7.1
Illinois	8.0	8.0	9.1	16.3	30.7	23.9	1.1
Indiana	17.6	8.8	8.8	14.7	23.5	26.5	0.0
Iowa	12.5	0.0	12.5	8.3	33.3	20.8	12.5
Kentucky	12.0	4.0	12.0	8.0	24.0	20.0	20.0
Louisiana	6.0	8.0	12.0	12.0	22.0	32.0	8.0
Maine	4.4	4.4	2.2	13.0	23.9	32.6	19.6
Massachusetts	33.3	22.2	11.1	5.6	16.7	1.1	0.0
Michigan	9.2	9.2	6.1	15.3	29.6	22.4	8.2
Minnesota	23.7	2.6	7.9	18.4	31.6	13.2	2.6
Mississippi	5.3	5.3	21.0	10.5	21.0	26.3	10.5
Missouri	11.8	5.9	5.9	17.6	5.9	23.5	29.4
Montana	0.0	18.2	0.0	18.2	36.4	18.2	9.1
Nebraska	16.0	0.0	8.0	0.0	32.0	36.0	8.0
Nevada	0.0	9.1	0.0	9.1	18.2	63.6	0.0
New Hampshire	12.5	0.0	0.0	25.0	25.0	31.2	6.2
New Jersey	10.9	12.5	7.8	29.7	21.9	15.6	1.6
New Mexico	0.0	5.9	0.0	17.6	29.4	35.3	11.8
New York	15.2	7.9	8.4	14.0	23.0	24.2	7.3
North Carolina	8.4	4.2	11.6	28.4	25.3	16.8	5.3
North Dakota	23.1	0.0	15.4	23.1	30.8	0.0	7.7
Ohio	16.5	6.6	7.4	20.7	31.4	15.7	1.6
Oklahoma	13.3	0.0	6.7	13.3	20.0	20.0	26.7
Oregon	12.2	7.4	4.0	12.2	18.9	32.4	12.8
Pennsylvania	14.7	8.3	9.6	11.5	25.0	23.1	7.7
Rhode Island	16.7	25.0	8.3	0.0	50.0	0.0	0.0
South Carolina	14.7	0.0	5.9	11.8	14.7	32.4	20.6
South Dakota	0.0	12.5	0.0	25.0	25.0	32.2	6.2
Tennessee	7.3	5.2	7.3	24.0	28.1	19.8	8.3
Texas	7.6	6.1	9.1	10.6	22.7	24.2	19.7
Utah	13.6	0.0	13.6	13.6	36.4	13.6	9.1
Vermont	12.5	0.0	6.2	25.0	37.5	6.2	12.5
Virginia	15.7	0.0	7.8	27.4	23.5	21.6	3.9
Washington	4.2	4.2	0.0	16.7	20.8	37.5	16.7
West Virginia	10.0	3.3	3.3	26.7	30.0	20.0	6.7
Wyoming	8.3	8.3	0.0	8.3	33.3	41.7	0.0
Total	10.5	5.5	6.7	16.3	25.9	25.6	9.5

Source: Mail survey conducted in 2004.

**Table 4. Average Number of Permanent and Temporary Employees by State, 2003**

State	Response rate <sup>a</sup>	Permanent Employment		Temporary Employment	
		Average per nursery	Standard deviation	Average per nursery	Standard deviation
	percent	number	number	number	number
AR	100.0	2.5	2.6	5.0	6.8
CA	83.3	22.7	86.4	10.1	31.0
CO	100.0	9.5	13.8	15.5	20.0
CT	91.3	18.2	39.4	27.3	55.3
DE	64.0	2.3	3.2	5.6	12.3
FL	90.3	14.2	30.6	4.5	22.4
GA	92.9	12.5	38.2	5.1	14.7
HI	92.9	10.9	18.1	2.4	3.1
ID	85.7	4.8	9.7	11.6	17.5
IL	92.0	5.2	10.6	14.7	23.4
IN	100.0	6.1	7.3	13.1	16.9
IA	95.8	4.1	4.7	9.2	11.9
KY	92.0	9.0	20.8	7.8	15.5
LA	90.0	11.5	31.6	8.3	18.7
ME	82.6	4.9	14.9	2.8	4.3
MA	94.4	11.2	15.6	25.5	59.3
MI	87.8	6.3	12.6	15.8	27.5
MN	94.7	6.8	7.9	19.1	19.6
MS	100.0	6.0	6.4	5.1	6.0
MO	82.4	3.9	6.0	8.1	14.1
MT	90.9	10.5	13.7	17.2	16.0
NE	88.0	6.0	15.7	9.2	19.0
NV	81.8	10.7	18.9	3.4	6.7
NH	100.0	11.3	26.6	13.3	23.8
NJ	87.5	8.9	20.3	11.1	20.0
NM	94.1	11.3	16.8	3.6	4.4
NY	86.5	8.6	26.8	10.3	22.0
NC	97.9	12.8	28.4	8.1	14.1
ND	100.0	3.8	5.3	17.8	30.8
OH	87.6	7.8	18.7	10.5	19.2
OK	80.0	59.3	143.5	22.3	43.9
OR	87.2	19.4	51.9	16.4	36.6
PA	92.9	5.1	11.7	8.6	16.1
RI	91.7	4.5	5.6	11.5	24.9
SC	88.2	4.0	4.6	3.8	5.4
SD	93.8	4.1	7.6	14.4	29.1
TN	93.8	6.4	12.8	7.8	15.4
TX	89.4	23.0	80.0	21.0	69.7
UT	95.5	5.6	5.8	15.0	15.0
VT	100.0	1.9	2.7	6.1	7.4
VA	92.2	14.5	24.9	9.8	12.8
WA	87.5	3.6	3.6	8.0	11.9
WV	86.7	3.7	10.0	10.3	33.9
WY	75.0	2.4	2.7	7.6	11.5
Total	90.0	11.0	35.2	9.9	25.7

<sup>a</sup> Percent of respondents providing information for this question.

Source: Mail survey conducted in 2004.

**Table 5. Change in Nursery Employment Numbers over Last Five Years by State, 2003**

State	Permanent Employees					Temporary Employees				
	Direction of change			Level of change		Direction of change			Level of change	
	Increase	Decrease	Same	Increase	Decrease	Increase	Decrease	Same	increase	Decrease
	percent of respondents			average percent		percent of respondents			average percent	
AR	19.2	11.5	69.2	50.0	1.0	42.1	10.5	47.4	59.0	0.0
CA	21.4	18.4	60.2	51.0	39.0	25.7	9.5	64.9	69.0	29.0
CO	23.5	17.6	58.8	64.0	28.0	43.8	25.0	31.3	16.0	34.0
CT	47.4	0.0	52.6	29.0	0.0	55.0	5.0	40.0	26.0	50.0
DE	0.0	25.0	75.0	0.0	0.0	13.3	26.7	60.0	86.0	21.0
FL	28.3	15.0	56.7	48.0	39.0	22.6	15.0	62.4	42.0	37.0
GA	18.9	16.9	64.2	29.0	46.0	20.0	15.0	65.0	56.0	25.0
HI	38.5	23.1	38.5	23.0	39.0	37.5	25.0	37.5	20.0	46.0
ID	41.7	0.0	58.3	118.0	0.0	33.3	0.0	66.7	13.0	0.0
IL	26.5	10.3	63.2	34.0	41.0	26.0	11.0	63.0	15.0	41.0
IN	25.8	16.1	58.1	21.0	40.0	29.0	19.4	51.6	53.0	27.0
IA	0.0	22.7	77.3	0.0	13.0	26.3	15.8	57.9	70.0	36.0
KY	21.7	17.4	60.9	38.0	20.0	35.0	10.0	55.0	32.0	25.0
LA	15.6	15.6	68.9	103.0	38.0	24.2	24.2	51.5	32.0	33.0
ME	7.3	4.9	87.8	60.0	0.0	22.2	3.7	74.1	24.0	3.0
MA	29.4	29.4	41.2	18.0	39.0	35.7	7.1	57.1	21.0	80.0
MI	22.0	7.3	70.7	23.0	46.0	35.1	18.9	45.9	34.0	26.0
MN	50.0	9.4	40.6	40.0	43.0	48.6	11.4	40.0	34.0	59.0
MS	25.0	25.0	50.0	26.0	23.0	33.3	11.1	55.6	58.0	0.0
MO	15.4	15.4	69.2	20.0	20.0	23.1	23.1	53.8	10.0	3.0
MT	33.3	11.1	55.6	50.0	20.0	44.4	11.1	44.4	65.0	50.0
NE	36.8	5.3	57.9	27.0	0.0	52.6	10.5	36.8	29.0	50.0
NV	30.0	10.0	60.0	50.0	33.0	20.0	0.0	80.0	0.0	0.0
NH	33.3	6.7	60.0	40.0	50.0	53.8	7.7	38.5	46.0	20.0
NJ	23.6	12.7	63.6	47.0	22.0	27.3	18.2	54.5	46.0	46.0
NM	28.6	14.3	57.1	46.0	22.0	36.4	18.2	45.5	55.0	22.0
NY	21.8	16.3	61.9	33.0	37.0	28.6	20.6	50.8	39.0	26.0
NC	33.3	14.9	51.7	31.0	37.0	45.5	14.3	40.3	30.0	31.0
ND	0.0	8.3	91.7	0.0	0.0	18.2	18.2	63.6	10.0	5.0
OH	15.2	16.2	68.7	25.0	29.0	25.5	12.8	61.7	27.0	26.0
OK	33.3	16.7	50.0	55.0	25.0	30.0	10.0	60.0	50.0	50.0
OR	30.7	11.8	57.5	36.0	33.0	31.7	16.3	51.9	32.0	28.0
PA	20.9	7.0	72.2	75.0	26.0	30.0	9.1	60.9	52.0	24.0
RI	16.7	25.0	58.3	58.0	50.0	37.5	37.5	25.0	13.0	17.0
SC	33.3	23.3	43.3	36.0	33.0	31.8	22.7	45.5	26.0	47.0
SD	16.7	8.3	75.0	30.0	20.0	46.2	15.4	38.5	51.0	28.0
TN	12.5	18.8	68.8	36.0	48.0	23.4	18.2	58.4	50.0	46.0
TX	20.0	20.0	60.0	58.0	21.0	36.4	15.9	47.7	24.0	24.0
UT	23.8	19.0	57.1	31.0	9.0	22.2	22.2	55.6	39.0	15.0
VT	25.0	0.0	75.0	56.0	0.0	33.3	0.0	66.7	25.0	0.0
VA	40.5	11.9	47.6	65.0	47.0	34.9	16.3	48.8	54.0	39.0
WA	17.6	11.8	70.6	133.0	50.0	50.0	18.8	31.3	63.0	50.0
WV	13.0	17.4	69.6	60.0	35.0	21.7	21.7	56.5	44.0	25.0
WY	10.0	10.0	80.0	16.0	0.0	42.9	14.3	42.9	30.0	50.0
Total	24.2	14.2	61.5	43.9	35.3	30.3	15.0	54.7	39.0	31.4

Source: Mail survey conducted in 2004.

**Table 6. Percentage Distribution of Computer Use by Nursery Function by State, 2003**  
**(Page 1 of 4)**

State <sup>a</sup>	Word Processing			Accounting/ cost analysis			Inventory		
	No Response	Plan to Use	Currently Using	No Response	Plan to Use	Currently Using	No Response	Plan to Use	Currently Using
AR	42.9	3.6	53.6	42.9	14.3	42.9	57.1	17.9	25.0
CA	31.0	0.8	68.3	32.5	5.6	61.9	47.6	8.7	43.7
CO	5.9	0.0	94.1	5.9	0.0	94.1	5.9	23.5	70.6
CT	13.0	0.0	87.0	21.7	4.4	73.9	30.4	8.7	60.9
DE	64.0	0.0	36.0	68.0	8.0	24.0	72.0	4.0	24.0
FL	35.1	2.7	62.2	35.1	6.5	58.4	51.9	10.7	37.4
GA	39.3	0.0	60.7	35.7	5.4	58.9	50.0	5.4	44.6
HI	14.3	0.0	85.7	28.6	0.0	71.4	50.0	7.1	42.9
ID	28.6	0.0	71.4	21.4	0.0	78.6	50.0	7.1	42.9
IL	30.7	0.0	69.3	40.9	4.6	54.6	44.3	12.5	43.2
IN	17.7	2.9	79.4	20.6	11.8	67.7	38.2	23.5	38.2
IA	25.0	4.2	70.8	33.3	8.3	58.3	41.7	8.3	50.0
KY	36.0	0.0	64.0	40.0	0.0	60.0	60.0	4.0	36.0
LA	34.0	4.0	62.0	34.0	8.0	58.0	50.0	14.0	36.0
ME	34.8	2.2	63.0	37.0	15.2	47.8	54.4	13.0	32.6
MA	33.3	0.0	66.7	27.8	5.6	66.7	44.4	11.1	44.4
MI	37.6	3.1	65.3	33.7	9.2	57.1	36.7	14.3	49.0
MN	15.8	0.0	84.2	18.4	0.0	81.6	29.0	5.3	65.8
MS	21.1	0.0	79.0	26.3	0.0	73.7	36.8	10.5	52.6
MO	35.3	5.9	58.9	47.1	11.8	41.2	52.9	23.5	23.5
MT	27.3	0.0	72.7	18.2	9.1	72.7	54.6	18.2	27.3
NE	40.0	4.0	56.0	48.0	12.0	40.0	56.0	12.0	32.0
NV	0.0	0.0	100.0	18.2	9.1	72.7	27.3	18.2	54.6
NH	18.8	0.0	81.3	25.0	0.0	75.0	31.3	12.5	56.3
NJ	29.7	4.7	65.6	31.3	6.3	62.5	51.6	9.4	39.1
NM	11.8	11.8	88.2	41.2	5.9	52.9	35.3	11.8	52.9
NY	34.3	2.8	62.9	39.9	5.6	54.5	52.8	10.1	37.1
NC	28.4	3.2	68.4	30.5	9.5	60.0	37.9	15.8	46.3
ND	46.2	0.0	53.9	61.5	0.0	38.5	46.2	23.1	30.8
OH	42.2	5.8	52.1	43.8	6.6	49.6	56.2	9.1	34.7
OK	33.3	0.0	66.7	33.3	13.3	53.3	40.0	6.7	53.3
OR	23.0	2.7	74.3	23.7	4.7	71.6	36.5	10.8	52.7
PA	44.2	1.9	53.9	43.6	7.7	48.7	57.7	14.7	27.6
RI	41.7	0.0	58.3	33.3	16.7	50.0	50.0	16.7	33.3
SC	23.5	2.9	73.5	29.4	8.8	61.8	44.1	11.8	44.1
SD	31.3	0.0	68.8	62.5	0.0	37.5	62.5	18.8	18.8
TN	41.7	3.1	55.2	39.6	6.3	54.2	50.0	12.5	37.5
TX	16.7	0.0	83.3	21.2	3.0	75.8	42.4	6.1	51.5
UT	13.6	0.0	86.4	22.7	4.6	72.7	45.5	9.1	45.5
VT	25.0	0.0	75.0	18.8	6.3	75.0	56.3	25.0	18.8
VA	15.7	0.0	84.3	21.6	7.8	70.6	37.3	9.8	52.9
WA	16.7	0.0	83.3	20.8	8.3	70.8	45.8	20.8	33.3
WV	36.7	0.0	63.3	46.7	6.7	46.7	66.7	6.7	26.7
WY	41.7	8.3	50.0	33.3	8.3	58.3	41.7	16.7	41.7
Total	31.9	2.6	65.8	34.5	6.6	59.0	47.9	11.6	40.5

<sup>a</sup> States providing survey data for this study.  
Source: Mail survey conducted in 2004.

**Table 6. Percentage Distribution of Computer Use by Nursery Function by State, 2003  
(Page 2 of 4)**

State <sup>a</sup>	Financial investment/ analysis			Internet Commerce			CDs for marketing		
	No Response	Plan to Use	Currently Using	No Response	Plan to Use	Currently Using	No Response	Plan to Use	Currently Using
AR	71.4	7.1	21.4	64.3	7.1	28.6	82.1	10.7	7.1
CA	69.8	6.4	23.8	66.7	5.6	27.8	84.9	8.7	6.4
CO	47.1	11.8	41.2	35.3	23.5	41.2	58.8	23.5	17.7
CT	56.5	8.7	34.8	60.9	8.7	30.4	73.9	17.4	8.7
DE	84.0	0.0	16.0	84.0	8.0	8.0	96.0	4.0	0.0
FL	70.8	6.5	22.7	66.2	6.9	26.9	84.0	8.0	8.0
GA	69.6	3.6	26.8	75.0	5.4	19.6	83.9	3.6	12.5
HI	57.1	7.1	35.7	35.7	7.1	57.1	71.4	21.4	7.1
ID	71.4	0.0	28.6	78.6	7.1	14.3	85.7	0.0	14.3
IL	63.6	3.4	33.0	67.1	9.1	23.9	79.6	11.4	9.1
IN	58.8	5.9	35.3	70.6	8.8	20.6	76.5	14.7	8.8
IA	70.8	8.3	20.8	75.0	4.2	20.8	91.7	8.3	0.0
KY	76.0	4.0	20.0	72.0	0.0	28.0	84.0	8.0	8.0
LA	72.0	6.0	22.0	64.0	4.0	32.0	86.0	8.0	6.0
ME	69.6	10.9	19.6	65.2	8.7	26.1	93.5	6.5	0.0
MA	72.2	0.0	27.8	50.0	5.6	44.4	83.3	5.6	11.1
MI	60.2	9.2	30.6	67.4	7.1	25.5	81.6	13.3	5.1
MN	52.6	2.6	44.7	55.3	2.6	42.1	89.5	10.5	0.0
MS	68.4	5.3	26.3	73.7	5.3	21.1	89.5	10.5	0.0
MO	82.4	5.9	11.8	70.6	11.8	17.7	94.1	5.9	0.0
MT	45.5	18.2	36.4	36.4	18.2	45.5	63.6	9.1	27.3
NE	64.0	20.0	16.0	76.0	12.0	12.0	92.0	4.0	4.0
NV	36.4	9.1	54.6	54.6	9.1	36.4	90.9	9.1	0.0
NH	56.3	12.5	31.3	62.5	12.5	25.0	87.5	0.0	12.5
NJ	70.3	4.7	25.0	68.8	14.1	17.2	87.5	7.8	4.7
NM	70.6	5.9	23.5	70.6	5.9	23.5	94.1	0.0	5.9
NY	68.0	3.9	28.1	68.5	6.2	25.3	83.7	5.6	10.7
NC	66.3	8.4	25.3	68.4	11.6	20.0	87.4	9.5	3.2
ND	84.6	0.0	15.4	84.6	0.0	15.4	100.0	0.0	0.0
OH	72.7	5.0	22.3	77.7	3.3	19.0	87.6	6.6	5.8
OK	73.3	13.3	13.3	80.0	6.7	13.3	86.7	6.7	6.7
OR	62.8	4.1	33.1	59.5	8.8	31.8	85.1	6.1	8.8
PA	75.6	6.4	18.0	74.4	7.1	18.6	92.3	4.5	3.2
RI	91.7	8.3	0.0	66.7	8.3	25.0	91.7	8.3	0.0
SC	64.7	8.8	26.5	55.9	14.7	29.4	85.3	11.8	2.9
SD	87.5	0.0	12.5	81.3	12.5	6.3	81.3	0.0	18.8
TN	71.9	5.2	22.9	71.9	2.1	26.0	87.5	5.2	7.3
TX	63.6	6.1	30.3	63.6	6.1	30.3	75.8	15.2	9.1
UT	63.6	4.6	31.8	63.6	9.1	27.3	81.8	18.2	0.0
VT	81.3	0.0	18.8	56.3	25.0	18.8	87.5	6.3	6.3
VA	56.9	5.9	37.3	64.7	11.8	23.5	84.3	5.9	9.8
WA	58.3	20.8	20.8	70.8	8.3	20.8	83.3	8.3	8.3
WV	80.0	0.0	20.0	76.7	0.0	23.3	90.0	6.7	3.3
WY	75.0	8.3	16.7	83.3	8.3	8.3	91.7	8.3	0.0
Total	68.4	6.1	25.5	67.6	7.4	25.1	85.2	8.0	6.8

<sup>a</sup> States providing survey data for this study.  
Source: Mail survey conducted in 2004.

**Table 6. Percentage Distribution of Computer Use by Nursery Function by State, 2003  
(Page 3 of 4)**

State <sup>a</sup>	Communications/ E-Mail			Landscape design			Production scheduling		
	No Response	Plan to Use	Currently Using	No Response	Plan to Use	Currently Using	No Response	Plan to Use	Currently Using
AR	42.9	0.0	57.1	92.9	7.1	0.0	85.7	7.1	7.1
CA	31.8	2.4	65.9	87.3	5.6	7.1	75.4	7.1	17.5
CO	5.9	0.0	94.1	88.2	5.9	5.9	58.8	5.9	35.3
CT	21.7	4.4	73.9	78.3	8.7	13.0	60.9	4.4	34.8
DE	64.0	4.0	32.0	96.0	4.0	0.0	88.0	0.0	12.0
FL	38.7	4.4	56.9	89.5	5.0	5.5	75.4	9.0	15.6
GA	42.9	1.8	55.4	87.5	3.6	8.9	82.1	1.8	16.1
HI	7.1	0.0	92.9	100.0	0.0	0.0	71.4	7.1	21.4
ID	28.6	0.0	71.4	92.9	0.0	7.2	71.4	0.0	28.6
IL	35.2	1.1	63.6	83.0	8.0	9.1	76.1	10.2	13.6
IN	29.4	11.8	58.8	76.5	11.8	11.8	70.6	11.8	17.7
IA	33.3	4.2	62.5	70.8	8.3	20.8	79.2	4.2	16.7
KY	28.0	0.0	72.0	88.0	12.0	0.0	88.0	4.0	8.0
LA	36.0	4.0	60.0	88.0	4.0	8.0	84.0	8.0	8.0
ME	34.8	0.0	65.2	84.8	4.4	10.9	80.4	4.4	15.2
MA	38.9	0.0	61.1	88.9	5.6	5.6	72.2	5.6	22.2
MI	42.9	5.1	52.0	79.6	11.2	9.2	74.5	7.1	18.4
MN	18.4	0.0	81.6	73.7	5.3	21.1	52.6	15.8	31.6
MS	26.3	0.0	73.7	89.5	0.0	10.5	73.7	0.0	26.3
MO	35.3	17.7	47.1	94.1	5.9	0.0	88.2	0.0	11.8
MT	27.3	0.0	72.7	81.8	0.0	18.2	36.4	18.2	45.5
NE	40.0	0.0	60.0	76.0	12.0	12.0	80.0	16.0	4.0
NV	18.2	9.1	72.7	100.0	0.0	0.0	81.8	9.1	9.1
NH	18.8	6.3	75.0	87.5	6.3	6.3	62.5	12.5	25.0
NJ	46.9	6.3	46.9	84.4	6.3	9.4	75.0	14.1	10.9
NM	17.7	0.0	82.4	88.2	5.9	5.9	76.5	0.0	23.5
NY	42.1	3.4	54.5	83.7	5.1	11.2	75.8	6.7	17.4
NC	28.4	6.3	65.3	88.4	7.4	4.2	74.7	5.3	20.0
ND	30.8	0.0	69.2	69.2	0.0	30.8	84.6	0.0	15.4
OH	49.6	4.1	46.3	84.3	5.0	10.7	76.9	5.0	18.2
OK	46.7	0.0	53.3	80.0	20.0	0.0	73.3	6.7	20.0
OR	26.4	2.0	71.6	96.0	1.4	2.7	92.8	10.8	26.4
PA	44.9	4.5	50.6	88.5	3.9	7.7	78.9	7.7	13.5
RI	50.0	8.3	41.7	75.0	16.7	8.3	75.0	8.3	16.7
SC	23.5	8.8	67.7	82.4	2.9	14.7	76.5	8.8	14.7
SD	31.3	6.3	62.5	81.3	6.3	12.5	93.8	0.0	6.3
TN	43.8	0.0	56.3	87.5	4.2	8.3	71.9	9.4	18.8
TX	21.2	6.1	72.7	78.8	12.1	9.1	68.2	6.1	25.8
UT	45.5	4.6	50.0	90.9	4.6	4.6	50.0	4.6	45.5
VT	37.5	0.0	62.5	75.0	18.8	6.3	81.3	12.5	6.3
VA	21.6	0.0	78.4	90.2	2.0	7.8	74.5	3.9	21.6
WA	25.0	4.2	70.8	87.5	0.0	12.5	62.5	4.2	33.3
WV	46.7	6.7	46.7	86.7	3.3	10.0	80.0	3.3	16.7
WY	58.3	16.7	25.0	83.3	16.7	0.0	58.3	16.7	25.0
Total	36.5	3.7	59.9	86.5	5.6	7.8	74.4	7.6	18.0

<sup>a</sup> States providing survey data for this study.  
Source: Mail survey conducted in 2004.

**Table 6. Percentage Distribution of Computer Use by Nursery Function by State, 2003  
(Page 4 of 4)**

State <sup>a</sup>	Greenhouse production controls			Digital Imaging			Bar Coding		
	No Response	Plan to Use	Currently Using	No Response	Plan to Use	Currently Using	No Response	Plan to Use	Currently Using
AR	92.9	3.6	3.6	92.9	3.6	3.6	89.3	7.1	3.6
CA	84.1	4.8	11.1	92.1	4.8	3.2	75.4	9.5	15.1
CO	88.2	0.0	11.8	94.1	5.9	0.0	64.7	17.7	17.7
CT	69.6	13.0	17.4	97.0	13.0	0.0	60.9	17.4	21.7
DE	88.0	0.0	12.0	96.0	4.0	0.0	96.0	4.0	0.0
FL	84.9	7.1	8.0	91.4	5.9	2.7	83.6	5.3	11.1
GA	89.3	3.6	7.1	87.5	3.6	8.9	87.5	1.8	10.7
HI	85.7	7.1	7.1	92.9	7.1	0.0	78.6	14.3	7.1
ID	78.6	0.0	21.4	100.0	0.0	0.0	85.7	7.1	7.1
IL	84.1	12.5	3.4	88.6	8.0	3.4	79.6	10.2	10.2
IN	82.4	11.8	5.9	88.2	8.8	2.9	85.3	8.8	5.9
IA	91.7	4.2	4.2	85.8	4.2	0.0	83.3	8.3	8.3
KY	92.0	4.0	4.0	86.0	0.0	4.0	96.0	4.0	0.0
LA	84.0	10.0	6.0	86.0	10.0	4.0	88.0	6.0	6.0
ME	89.1	4.4	6.5	91.3	6.5	2.2	84.8	10.9	4.4
MA	72.2	11.1	16.7	94.4	0.0	5.6	83.3	5.6	11.1
MI	83.7	7.1	9.2	88.8	9.2	2.0	81.6	9.2	9.2
MN	86.8	5.3	7.9	92.1	2.6	5.3	84.2	5.3	10.5
MS	68.4	5.3	26.3	84.2	5.3	10.5	89.5	5.3	5.3
MO	100.0	0.0	0.0	94.1	0.0	5.9	70.6	11.7	11.8
MT	54.6	9.1	36.4	81.8	9.1	9.1	63.6	9.1	27.3
NE	92.0	8.0	0.0	100.0	0.0	0.0	92.0	4.0	4.0
NV	90.9	9.1	0.0	100.0	0.0	0.0	81.8	0.0	18.2
NH	81.3	6.3	12.5	75.0	18.8	6.3	68.8	12.5	18.8
NJ	82.8	10.9	6.3	90.6	6.3	3.1	78.1	14.1	7.8
NM	100.0	0.0	0.0	94.1	0.0	5.9	100.0	0.0	0.0
NY	79.2	9.6	11.2	88.2	5.6	6.2	81.5	7.9	10.7
NC	83.2	4.2	12.6	88.4	6.3	5.3	80.0	12.6	7.4
ND	84.6	0.0	15.4	92.3	7.7	0.0	92.3	7.7	0.0
OH	90.9	4.1	5.0	95.9	1.7	2.5	89.3	3.3	7.4
OK	80.0	6.7	13.3	93.3	0.0	6.7	66.7	6.7	26.7
OR	76.4	10.1	13.5	91.2	4.1	4.7	76.4	8.8	14.9
PA	92.3	3.9	3.9	94.2	3.2	2.6	89.7	4.5	5.8
RI	100.0	0.0	0.0	100.0	0.0	0.0	83.3	8.3	8.3
SC	85.3	11.8	2.9	85.3	8.8	5.9	85.3	11.8	2.9
SD	93.8	0.0	6.3	93.8	0.0	6.3	93.8	0.0	6.3
TN	87.5	6.3	6.3	92.7	3.1	4.2	86.5	2.1	11.5
TX	81.8	9.1	9.1	78.8	10.6	10.6	72.7	10.6	16.7
UT	90.9	4.6	4.6	95.5	0.0	4.6	81.8	0.0	18.2
VT	87.5	12.5	0.0	87.5	12.5	0.0	75.0	25.0	0.0
VA	88.2	3.9	7.8	96.1	2.0	2.0	82.4	2.0	15.7
WA	79.2	4.2	16.7	91.7	4.2	4.2	83.3	8.3	8.3
WV	83.3	10.0	6.7	93.3	0.0	6.7	86.7	6.7	6.7
WY	91.7	8.3	0.0	91.7	8.3	0.0	91.7	8.3	0.0
Total	84.9	6.8	8.3	91.0	5.3	3.7	82.7	7.2	10.1

<sup>a</sup> States providing survey data for this study.  
Source: Mail survey conducted in 2004.

**Table 7. Weighted Average Distribution of Nursery Sales by Plant Category, 2003 (page 1 of 2)**

State	Response rate <sup>a</sup>	Deciduous		Evergreen Shrubs		Evergreen Trees	Azaleas	Vines & ground cover	Roses
		Trees	Shrubs	Broad	Narrow				
	percent	percent <sup>b</sup>							
AR	89.3	18.7	5.3	3.4	3.9	20.5	3.0	3.1	0.4
CA	90.5	8.7	2.5	9.2	2.3	2.5	2.4	3.4	2.0
CO	94.1	37.3	19.1	2.7	6.8	15.4	0.0	2.8	0.7
CT	95.7	2.0	5.8	17.0	9.7	3.1	2.7	7.5	0.4
DE	76.0	15.3	6.1	4.1	2.0	18.3	2.3	0.3	0.0
FL	91.0	6.1	1.4	6.4	1.5	6.0	0.8	7.9	1.6
GA	92.9	6.7	7.6	25.4	10.2	6.2	10.0	13.5	2.9
HI	92.9	0.0	0.0	0.0	0.0	0.3	0.0	0.0	0.0
ID	100.0	10.7	4.0	0.0	0.0	16.4	0.1	0.2	0.1
IL	96.6	22.0	14.4	2.9	6.6	9.2	0.5	6.3	2.6
IN	94.1	31.0	15.8	1.9	3.3	28.8	0.5	0.7	0.3
IA	100.0	31.7	23.7	1.1	5.7	7.6	0.4	1.3	2.3
KY	100.0	44.0	8.2	6.7	10.4	7.2	1.0	4.4	1.0
LA	96.0	12.8	5.5	17.1	5.5	3.9	5.5	17.4	0.9
ME	95.7	24.0	21.9	8.9	2.3	8.0	2.2	1.3	1.1
MA	94.4	13.2	4.3	7.8	8.3	4.8	2.7	3.1	2.1
MI	91.8	10.8	0.8	4.9	5.9	12.4	2.0	9.2	1.9
MN	89.5	31.1	4.4	0.7	1.9	22.9	0.4	2.2	2.7
MS	88.9	2.5	0.6	5.1	0.9	15.7	0.2	0.1	0.3
MO	88.2	4.5	3.7	10.1	1.7	10.3	0.6	0.4	0.3
MT	81.8	14.3	1.2	1.4	3.5	20.5	0.2	5.5	6.8
NE	100.0	28.2	5.2	2.7	2.4	17.3	0.0	0.4	1.3
NV	100.0	31.4	4.7	22.5	0.2	11.8	3.7	0.9	1.6
NH	93.8	0.9	1.1	0.7	0.7	1.2	0.3	0.5	0.6
NJ	92.2	10.0	9.5	6.5	6.2	5.6	4.4	3.1	1.7
NM	94.1	43.7	0.3	3.2	0.2	5.0	0.0	2.7	1.6
NY	92.1	5.8	5.8	4.7	2.5	6.6	2.4	1.0	0.4
NC	96.8	10.5	5.2	15.8	5.1	4.9	3.3	1.8	3.3
ND	100.0	10.9	8.5	0.4	9.5	30.1	0.0	0.0	1.7
OH	90.9	26.0	7.9	2.0	5.9	27.1	0.4	1.2	0.9
OK	80.0	18.1	7.2	15.6	9.1	1.3	0.0	2.8	2.0
OR	92.6	29.3	7.3	8.8	7.2	9.9	5.8	0.7	0.2
PA	95.5	13.9	0.5	8.9	11.9	10.3	2.6	1.0	5.2
RI	91.7	6.9	17.3	22.9	37.9	6.7	2.5	0.3	0.5
SC	100.0	6.3	0.5	2.1	0.7	7.7	0.3	1.3	0.5
SD	81.3	32.7	7.9	0.3	1.4	15.2	0.1	1.3	1.8
TN	94.8	32.4	11.3	4.3	2.2	3.4	1.2	0.4	0.2
TX	89.4	7.7	3.8	5.4	0.6	5.7	0.8	1.4	8.2
UT	95.5	14.0	12.3	3.8	1.7	3.9	0.7	1.6	3.5
VT	93.8	11.3	10.9	2.2	0.0	5.7	0.0	1.7	1.7
VA	94.1	23.2	7.8	19.5	5.4	6.6	5.1	4.1	3.1
WA	95.8	10.3	6.5	0.7	0.5	5.5	0.2	2.9	0.0
WV	96.7	5.9	5.9	4.0	8.1	5.6	0.4	0.2	0.0
WY	83.3	28.6	1.9	0.5	1.0	10.0	0.0	0.0	2.1
Total	92.8	13.6	6.6	7.6	4.4	8.2	2.2	3.9	1.8

<sup>a</sup> Percent of respondents who provided information for this question.

<sup>b</sup> Weighted by total annual sales.

Source: Mail survey conducted in 2004.

**Table 7. Weighted Average Distribution of Nursery Sales by Plant Category, 2003 (page 2 of 2)**

State	Herbaceous perennials	Bedding Plants		Flowering potted plants	Christmas trees	Tree Fruit	Foliage	Propagated material	Other
		Flowering annual	Veggie, fruit, herbs						
percent <sup>b</sup>									
AR	7.1	1.1	1.5	0.7	0.1	2.7	0.7	2.6	25.4
CA	12.3	15.0	4.9	7.3	0.0	6.5	8.7	1.5	11.0
CO	13.2	1.2	0.3	0.0	0.0	0.0	0.0	0.0	0.5
CT	28.3	13.9	1.4	3.3	1.0	0.1	0.4	0.4	2.1
DE	6.2	7.8	1.7	5.4	12.2	0.0	0.1	18.1	0.2
FL	2.7	7.5	5.2	13.0	0.1	4.4	11.6	7.1	16.6
GA	10.0	2.3	0.1	0.6	1.3	0.0	0.2	2.9	0.3
HW	0.0	0.0	0.0	80.3	0.0	0.3	4.3	0.0	14.7
ID	10.3	38.6	4.6	6.1	0.8	0.1	0.0	4.6	3.4
IL	14.8	3.3	1.0	1.1	2.0	0.2	0.1	0.1	13.2
IN	3.1	1.9	0.4	1.9	3.0	0.4	0.6	0.8	5.6
IA	9.5	7.8	2.0	0.9	2.1	0.7	1.3	0.0	1.9
KY	3.3	6.3	1.3	0.7	0.6	0.2	0.0	0.0	4.8
LA	4.0	0.7	0.4	2.3	0.3	2.2	2.8	0.8	17.9
ME	7.0	6.3	3.2	1.9	0.8	0.7	0.7	0.8	6.0
MA	9.8	7.2	4.0	7.7	3.2	1.8	1.4	1.2	7.6
MI	13.4	5.6	0.8	1.9	4.8	0.3	0.8	13.0	1.4
MN	8.9	2.4	0.3	0.1	2.9	0.3	0.0	4.5	4.4
MS	0.2	3.2	1.1	2.1	65.4	0.1	1.9	0.8	0.0
MO	9.9	24.9	8.8	0.8	1.1	1.0	1.6	0.1	0.2
MT	1.5	23.6	0.5	2.2	0.5	3.3	0.3	4.8	0.0
NE	14.1	9.1	3.3	1.6	2.9	0.4	0.3	0.6	0.1
NV	4.5	0.6	0.4	0.4	0.2	0.4	0.2	0.1	16.5
NH	3.7	32.5	1.7	2.7	0.4	0.6	0.7	45.9	5.8
NJ	32.1	3.3	0.5	2.5	7.4	0.1	0.1	6.0	0.9
NM	4.8	4.4	3.4	1.5	0.6	0.1	4.4	0.2	4.1
NY	7.3	25.7	6.0	9.7	2.3	0.1	1.2	3.9	14.6
NC	2.7	9.6	0.7	8.0	4.1	0.2	2.1	0.5	22.2
ND	5.6	18.4	7.3	3.4	2.5	0.2	0.1	0.6	0.7
OH	7.7	9.6	0.8	0.1	2.1	0.1	0.5	1.6	6.3
OK	7.2	23.9	0.3	0.0	0.0	1.5	0.0	0.0	0.0
OR	5.2	7.1	1.5	4.0	0.6	0.9	0.1	7.1	4.3
PA	9.5	6.1	1.5	2.5	6.8	0.2	0.8	6.6	1.8
RI	1.5	0.4	0.4	0.3	1.4	0.0	0.0	0.1	0.8
SC	66.3	4.4	0.4	3.2	0.5	0.1	1.2	4.0	0.5
SD	7.4	5.6	0.3	0.4	1.2	0.3	1.3	0.6	22.4
TN	3.0	6.9	0.8	5.9	0.2	18.1	0.2	3.7	5.6
TX	8.3	32.5	1.2	8.4	0.0	0.1	7.7	0.2	7.8
UT	9.3	7.7	1.7	2.4	1.4	1.1	8.3	0.6	26.3
VT	22.3	9.3	3.7	3.3	13.9	1.0	1.0	3.1	8.9
VA	6.3	5.3	0.5	1.6	0.3	2.3	0.1	0.3	8.3
WA	2.9	21.4	0.4	4.1	0.0	0.1	0.0	7.7	16.8
WV	4.6	13.5	0.2	4.3	44.4	2.1	0.0	0.1	0.7
WY	11.0	29.4	8.7	4.9	0.0	0.5	0.5	0.4	0.4
Avg.	8.5	10.4	2.7	7.1	2.7	2.3	3.9	4.4	9.7

<sup>a</sup> Percent of respondents who provided information for this question.

<sup>b</sup> Weighted by total annual sales.

Source: Mail survey conducted in 2004.

**Table 8. Share of Total Sales of Native Plants by State, 2003**

State	Response rate <sup>a</sup>	Share of total sales <sup>b</sup>	State	Response Rate <sup>a</sup>	Share of total sales <sup>b</sup>	State	Response rate <sup>a</sup>	Share of total sales <sup>b</sup>
	percent			percent			percent	
AR	89.3	48.9	MA	94.4	11.7	OK	80.0	2.5
CA	96.8	8.9	MI	93.9	11.0	OR	94.6	5.7
CO	94.1	6.8	MN	94.7	35.2	PA	96.2	15.8
CT	100.0	14.9	MS	94.7	3.4	RI	100.0	15.0
DE	76.0	22.4	MO	100.0	9.2	SC	100.0	8.2
FL	95.0	15.4	MT	90.9	22.4	SD	81.2	9.6
GA	98.2	9.1	NE	100.0	9.4	TN	97.9	24.0
HI	92.9	0.2	NV	100.0	6.6	TX	97.0	26.8
ID	100.0	11.6	NH	100.0	2.0	UT	95.4	26.9
IL	98.9	8.2	NJ	93.8	6.6	VT	93.7	13.4
IN	94.1	9.5	NM	100.0	13.7	VA	96.1	18.4
IA	100.0	26.5	NY	94.9	15.3	WA	95.8	11.9
KY	100.0	12.1	NC	96.8	8.1	WV	96.7	40.0
LA	96.0	9.4	ND	100.0	14.6	WY	91.7	8.1
ME	97.8	12.2	OH	94.2	20.0	Total	95.5	13.2

<sup>a</sup> Percent of respondents who provided information for this question.

<sup>b</sup> Weighted by total annual sales.

Source: Mail survey conducted in 2004.

**Table 9. Share of Irrigation Water From Four Possible Sources, 2003**

State	Response rate	Natural Surface	Recaptured	City	Well
	percent <sup>a</sup>	percent <sup>b</sup>			
AR	89.3	29.0	5.3	22.8	42.9
CA	94.4	1.2	1.5	50.1	47.3
CO	94.1	43.5	2.7	25.4	28.3
CT	100.0	35.5	16.9	2.1	45.5
DE	68.0	30.8	2.2	0.0	67.0
FL	93.5	10.8	5.8	1.4	82.0
GA	94.6	47.9	5.1	1.8	45.3
HI	92.9	4.3	76.0	6.6	13.2
ID	100.0	20.9	5.0	2.1	72.0
IL	89.8	33.6	12.7	2.3	51.4
IN	91.2	43.9	5.6	6.3	44.2
IA	100.0	17.0	0.0	32.9	50.1
KY	100.0	55.9	0.8	42.3	1.0
LA	90.0	11.8	30.7	5.3	52.2
ME	93.5	33.7	20.6	4.4	41.4
MA	94.4	21.0	17.8	14.7	46.6
MI	92.9	19.3	8.2	6.8	65.7
MN	92.1	24.2	1.4	3.1	71.3
MS	100.0	69.6	4.0	14.4	12.0
MO	100.0	0.6	0.0	45.6	53.8
MT	90.9	14.0	0.0	7.5	78.5
NE	100.0	1.1	9.8	1.9	87.2
NV	100.0	43.9	22.0	6.1	28.1
NH	100.0	5.9	18.8	4.4	70.8
NJ	89.1	10.6	1.7	2.0	85.8
NM	100.0	32.5	0.0	28.0	39.5
NY	93.3	22.4	4.5	28.7	44.4
NC	94.7	50.9	19.3	5.6	24.2
ND	92.3	61.6	0.0	2.5	35.9
OH	80.2	57.1	15.2	9.2	18.4
OK	80.0	55.2	10.0	2.9	31.9
OR	91.9	26.7	14.1	7.0	52.1
PA	89.1	30.6	20.6	4.0	44.8
RI	91.7	7.8	3.4	48.1	40.7
SC	97.1	7.8	1.1	77.7	13.5
SD	75.0	1.3	2.6	22.0	74.1
TN	93.8	54.3	7.7	15.7	22.4
TX	92.4	9.8	7.8	10.3	72.1
UT	95.5	26.6	0.5	38.1	34.7
VT	81.3	54.4	9.1	1.4	35.2
VA	92.2	28.9	41.1	0.8	29.2
WA	95.8	44.7	10.5	14.8	30.0
WV	83.3	46.5	0.8	45.4	7.4
WY	91.7	2.9	0.0	48.4	48.7
Total	92.0	24.3	10.1	12.6	53.1

<sup>a</sup> Based on number of respondents who provided information for this question.

<sup>b</sup> Percentage distributions based on averages of respondents who provided information for this question.

Source: Mail survey conducted in 2004.

**Table 10. Change in Use of Irrigation Water on Per-Acre Basis Over Past Five Years, 2003**

State	Response rate <sup>a</sup>	Firms with no change in water use	Firms with increased water use	Average percent increase	Firms with decreased water use	Average percent decrease
	percent					
AR	100.0	64.3	35.7	79.0	0.0	0.0
CA	92.9	66.7	25.6	42.0	7.7	15.6
CO	100.0	47.1	23.5	13.8	29.4	45.0
CT	95.7	72.7	9.1	32.5	18.2	32.5
DE	64.0	75.0	12.5	40.0	12.5	80.0
FL	97.9	70.0	15.7	38.5	14.4	22.5
GA	98.2	65.5	25.5	55.4	9.1	40.0
HI	100.0	64.3	35.7	31.0	0.0	0.0
ID	100.0	71.4	21.4	23.3	7.1	0.0
IL	80.7	69.0	19.7	27.5	11.3	36.3
IN	85.3	72.4	20.7	60.0	6.9	35.0
IA	83.3	80.0	20.0	26.3	0.0	0.0
KY	88.0	63.6	31.8	41.0	4.5	60.0
LA	88.0	65.9	29.5	30.5	4.5	15.0
ME	82.6	68.4	31.6	81.1	0.0	0.0
MA	100.0	55.6	27.8	34.0	16.7	38.0
MI	90.8	64.0	29.2	37.0	6.7	38.3
MN	94.7	52.8	36.1	38.5	11.1	38.3
MS	100.0	66.7	27.8	41.0	11.1	20.0
MO	94.1	68.8	18.8	40.0	12.5	40.0
MT	100.0	63.6	36.4	12.5	0.0	0.0
NE	96.0	45.8	45.8	38.0	8.3	15.0
NV	100.0	60.0	40.0	160.0	0.0	0.0
NH	100.0	50.0	43.8	58.6	6.3	0.0
NJ	84.4	51.9	33.3	26.9	14.8	20.7
NM	100.0	47.1	29.4	32.0	23.5	28.3
NY	87.1	63.2	27.7	62.5	9.0	33.3
NC	95.8	64.8	26.4	34.8	8.8	26.7
ND	76.9	80.0	10.0	20.0	10.0	1.0
OH	81.0	70.4	22.4	26.4	7.1	40.0
OK	100.0	66.7	26.7	51.3	6.7	10.0
OR	95.9	65.5	19.7	32.5	14.8	39.4
PA	81.4	69.3	25.2	43.0	5.5	57.5
RI	91.7	63.6	27.3	36.7	9.1	10.0
SC	91.2	54.8	38.7	43.2	6.5	27.5
SD	81.3	69.2	30.8	20.0	0.0	0.0
TN	92.7	66.3	25.8	51.9	7.9	37.0
TX	93.9	64.5	27.4	34.0	8.1	26.7
UT	90.9	60.0	20.0	18.8	20.0	20.0
VT	87.5	78.6	21.4	35.0	0.0	0.0
VA	84.3	69.8	20.9	68.6	9.3	27.5
WA	95.8	69.6	17.4	23.3	13.0	36.7
WV	70.0	85.7	9.5	125.0	4.8	10.0
WY	83.3	90.0	0.0	0.0	10.0	0.0
Total	90.9	66.4	23.7	42.3	10.0	29.5

<sup>a</sup> Percent of respondents who provided information for this question.

Source: Mail survey conducted in 2004.

**Table 11. Integrated Pest Management Practices Followed by Nursery Operators, 2003**  
(page 1 of 3)

State	Remove infested plants or plant parts	Alternate pesticides to limit chemical resistance	Elevate or space plants for air circulation	Use cultivation, hand weeding	Disinfect benches or ground cover	Use sanitized water foot baths	Soil solarization or sterilization
percent of respondents indicating "yes"							
AR	78.6	57.1	50.0	89.3	17.9	0.0	10.7
CA	84.1	50.8	63.5	83.3	30.2	3.2	11.9
CO	88.2	47.1	52.9	88.2	11.8	0.0	0.0
CT	95.7	60.9	56.5	82.6	39.1	4.3	13.0
DE	92.0	36.0	48.0	56.0	20.0	0.0	8.0
FL	86.8	72.1	66.4	81.3	44.3	3.4	10.5
GA	92.9	83.9	78.6	89.3	41.1	3.6	16.1
HI	85.7	71.4	92.9	85.7	85.7	7.1	7.1
ID	78.6	57.1	57.1	71.4	28.6	0.0	0.0
IL	85.2	48.9	40.9	77.3	10.2	2.3	3.4
IN	88.2	55.9	35.3	79.4	11.8	0.0	0.0
IA	91.7	58.3	54.2	87.5	20.8	4.2	12.5
KY	92.0	48.0	52.0	80.0	36.0	8.0	8.0
LA	80.0	64.0	52.0	82.0	22.0	6.0	10.0
ME	91.3	37.0	63.0	78.3	45.7	0.0	10.9
MA	83.3	72.2	66.7	66.7	44.4	0.0	16.7
MI	86.7	57.1	56.1	68.4	20.4	3.1	7.1
MN	94.7	65.8	68.4	84.2	18.4	2.6	15.8
MS	89.5	73.7	89.5	73.7	52.6	0.0	5.3
MO	100.0	76.5	70.6	82.4	29.4	0.0	5.9
MT	90.9	63.6	27.3	63.6	54.5	0.0	18.2
NE	96.0	48.0	56.0	88.0	16.0	0.0	8.0
NV	90.9	45.5	36.4	81.8	36.4	0.0	0.0
NH	100.0	81.3	87.5	75.0	62.5	18.8	25.0
NJ	90.6	54.7	59.4	89.1	29.7	1.6	4.7
NM	100.0	52.9	58.8	94.1	35.3	0.0	23.5
NY	91.6	62.9	65.2	69.7	51.7	5.1	15.2
NC	87.4	72.6	63.2	73.7	40.0	1.1	2.1
ND	92.3	53.8	53.8	84.6	46.2	0.0	15.4
OH	89.3	61.2	47.1	58.7	26.4	1.7	3.3
OK	93.3	60.0	60.0	80.0	26.7	0.0	6.7
OR	83.8	68.9	64.2	86.5	51.4	1.4	12.2
PA	89.1	64.7	57.1	62.8	28.8	1.9	5.1
RI	91.7	50.0	75.0	100.0	41.7	0.0	8.3
SC	91.2	73.5	61.8	79.4	35.3	0.0	8.8
SD	81.3	43.8	43.8	81.3	31.3	0.0	12.5
TN	81.3	61.5	56.3	82.3	26.0	1.0	12.5
TX	84.8	57.6	59.1	68.2	33.3	0.0	15.2
UT	81.8	59.1	59.1	77.3	22.7	0.0	18.2
VT	87.5	25.0	68.8	87.5	31.3	0.0	6.3
VA	92.2	70.6	47.1	54.9	31.4	0.0	5.9
WA	95.8	62.5	79.2	75.0	54.2	0.0	16.7
WV	90.0	53.3	50.0	63.3	23.3	0.0	10.0
WY	75.0	33.3	75.0	83.3	75.0	0.0	25.0
Total	87.8	62.6	60.2	76.8	35.6	2.3	9.7

Source: Mail survey conducted in 2004.

**Table 11. Integrated Pest Management Practices Followed by Nursery Operators, 2003**  
(page 2 of 3)

State	Monitor pest populations with tarps or sticky boards	Adjust pesticide application to protect beneficials	Use mulches to suppress weeds	Beneficial insect identification	Inspect incoming stock	Manage irrigation to reduce pests	Spot treatment with pesticides
percent of respondents indicating "yes"							
AR	17.9	50.0	46.4	28.6	57.1	32.1	64.3
CA	38.9	33.3	37.3	30.2	70.6	44.4	63.5
CO	23.5	29.4	47.1	35.3	82.4	35.3	82.4
CT	47.8	43.5	69.6	21.7	87.0	43.5	78.3
DE	8.0	20.0	28.0	28.0	64.0	20.0	48.0
FL	13.9	38.2	22.9	29.2	73.3	52.9	75.8
GA	16.1	46.4	25.0	39.3	78.6	53.6	80.4
HI	14.3	50.0	21.4	14.3	85.7	42.9	71.4
ID	35.7	42.9	42.9	35.7	71.4	42.9	92.9
IL	13.6	38.6	42.0	37.5	62.5	25.0	76.1
IN	2.9	44.1	47.1	41.2	67.6	32.4	79.4
IA	25.0	29.2	70.8	33.3	79.2	29.2	83.3
KY	24.0	28.0	48.0	28.0	76.0	16.0	68.0
LA	10.0	36.0	30.0	26.0	58.0	32.0	80.0
ME	34.8	23.9	54.3	41.3	76.1	32.6	50.0
MA	61.1	33.3	77.8	22.2	88.9	33.3	72.2
MI	24.5	29.6	43.9	37.8	67.3	42.9	64.3
MN	34.2	34.2	50.0	31.6	76.3	34.2	86.8
MS	15.8	36.8	36.8	26.3	78.9	47.4	89.5
MO	17.6	35.3	52.9	23.5	82.4	35.3	88.2
MT	36.4	27.3	45.5	27.3	72.7	45.5	81.8
NE	12.0	48.0	72.0	36.0	64.0	28.0	84.0
NV	54.5	27.3	27.3	36.4	54.5	18.2	45.5
NH	50.0	43.8	75.0	56.3	87.5	56.3	81.3
NJ	18.8	40.6	32.8	28.1	81.3	29.7	81.3
NM	52.9	35.3	52.9	47.1	70.6	58.8	70.6
NY	46.1	33.7	48.9	30.9	75.3	36.5	68.0
NC	26.3	46.3	33.7	36.8	70.5	43.2	75.8
ND	15.4	23.1	38.5	38.5	76.9	15.4	69.2
OH	18.2	38.0	38.0	32.2	66.1	22.3	76.0
OK	20.0	33.3	26.7	53.3	73.3	20.0	53.3
OR	38.5	39.2	37.8	32.4	76.4	52.0	68.9
PA	23.1	41.0	33.3	31.4	66.7	20.5	74.4
RI	25.0	25.0	75.0	25.0	83.3	33.3	83.3
SC	35.3	29.4	35.3	26.5	61.8	23.5	67.6
SD	43.8	6.3	62.5	12.5	75.0	37.5	87.5
TN	20.8	35.4	21.9	29.2	72.9	28.1	72.9
TX	16.7	28.8	33.3	25.8	68.2	36.4	62.1
UT	18.2	27.3	40.9	27.3	63.6	40.9	72.7
VT	43.8	50.0	75.0	43.8	81.3	37.5	75.0
VA	21.6	45.1	31.4	31.4	70.6	39.2	86.3
WA	37.5	33.3	50.0	29.2	75.0	62.5	66.7
WV	16.7	23.3	46.7	40.0	80.0	16.7	73.3
WY	16.7	16.7	58.3	25.0	75.0	41.7	66.7
Total	24.7	36.5	37.5	31.7	72.0	38.6	73.0

Source: Mail survey conducted in 2004.

**Table 11. Integrated Pest Management Practices Followed by Nursery Operators, 2003**  
(page 3 of 3)

State	Ventilate greenhouse	Use of beneficial insects	Keep pest activity records	Adjust fertilization rates	Use screening & barriers to exclude pests	Use biopesticides/ lower toxicity	Treat retention pond water	Use pest-resistant varieties
percent of respondents indicating "yes"								
AR	39.3	14.3	3.6	39.3	10.7	21.4	0.0	35.7
CA	51.6	27.8	19.8	44.4	19.0	26.2	7.1	29.4
CO	29.4	11.8	23.5	35.3	17.6	17.6	5.9	64.7
CT	56.5	26.1	43.5	30.4	21.7	26.1	8.7	69.6
DE	32.0	16.0	8.0	32.0	8.0	12.0	0.0	20.0
FL	43.9	15.5	26.3	53.4	14.1	21.4	5.5	33.2
GA	44.6	12.5	32.1	58.9	19.6	17.9	3.6	50.0
HI	64.3	0.0	42.9	85.7	35.7	21.4	0.0	7.1
ID	42.9	28.6	35.7	35.7	14.3	28.6	0.0	28.6
IL	18.2	13.6	18.2	27.3	5.7	18.2	2.3	42.0
IN	20.6	11.8	32.4	35.3	2.9	8.8	5.9	58.8
IA	20.8	20.8	25.0	29.2	12.5	16.7	0.0	41.7
KY	52.0	12.0	16.0	32.0	0.0	8.0	0.0	36.0
LA	46.0	12.0	12.0	48.0	8.0	10.0	6.0	30.0
ME	56.5	30.4	13.0	28.3	13.0	15.2	6.5	41.3
MA	44.4	16.7	27.8	50.0	5.6	22.2	5.6	50.0
MI	29.6	11.2	25.5	40.8	14.3	14.3	2.0	43.9
MN	39.5	10.5	23.7	31.6	5.3	2.6	2.6	52.6
MS	63.2	10.5	15.8	52.6	26.3	5.3	15.8	47.4
MO	35.3	5.9	17.6	29.4	0.0	17.6	5.9	29.4
MT	54.5	18.2	63.6	63.6	9.1	36.4	0.0	36.4
NE	32.0	16.0	12.0	28.0	20.0	12.0	8.0	48.0
NV	63.6	18.2	27.3	36.4	18.2	36.4	18.2	18.2
NH	81.3	31.3	37.5	50.0	25.0	43.8	0.0	43.8
NJ	45.3	10.9	23.4	34.4	7.8	18.8	3.1	53.1
NM	52.9	41.2	17.6	47.1	41.2	29.4	5.9	23.5
NY	64.0	19.7	31.5	49.4	15.2	23.0	2.8	41.6
NC	46.3	16.8	33.7	54.7	9.5	18.9	9.5	42.1
ND	46.2	23.1	30.8	30.8	0.0	0.0	0.0	23.1
OH	33.1	9.1	28.9	39.7	5.8	12.4	5.0	43.8
OK	53.3	40.0	6.7	46.7	6.7	20.0	6.7	20.0
OR	60.8	27.7	23.6	50.0	17.6	27.0	6.8	31.8
PA	36.5	11.5	27.6	35.9	6.4	14.1	2.6	38.5
RI	66.7	16.7	33.3	66.7	33.3	16.7	0.0	41.7
SC	58.8	17.6	14.7	52.9	20.6	11.8	2.9	35.3
SD	56.3	6.3	12.5	31.3	0.0	0.0	0.0	18.8
TN	40.6	9.4	20.8	60.4	9.4	9.4	8.3	33.3
TX	62.1	25.8	22.7	42.4	10.6	21.2	4.5	30.3
UT	45.5	22.7	18.2	36.4	4.5	18.2	0.0	31.8
VT	31.3	25.0	18.8	31.3	12.5	18.8	0.0	56.3
VA	33.3	11.8	35.3	41.2	0.0	17.6	9.8	51.0
WA	62.5	25.0	37.5	58.3	12.5	25.0	4.2	25.0
WV	26.7	13.3	33.3	40.0	6.7	13.3	0.0	40.0
WY	83.3	25.0	16.7	41.7	16.7	0.0	0.0	25.0
Total	45.2	16.9	25.2	45.2	12.2	18.5	4.8	38.0

Source: Mail survey conducted in 2004.

**Table 12. Weighted Average Percentage Distribution of Nursery Sales by Root Packaging Form, by State, 2003**

State	Response rate <sup>a</sup>	Bare-root	Balled & potted	Balled & burlapped	Processed balled	Container	Field grow bags	In-ground containers	Other
	percent	percent <sup>b</sup>							
AR	89.3	45.8	3.7	15.4	0.0	29.7	0.0	1.1	4.3
CA	92.9	10.4	0.9	0.9	0.1	85.7	0.2	0.8	1.0
CO	94.1	0.5	0.1	47.1	0.0	51.0	0.4	0.5	0.4
CT	100.0	0.3	1.8	1.5	0.0	96.0	0.1	0.0	0.3
DE	72.0	23.2	0.3	27.0	0.0	28.5	0.2	9.2	11.5
FL	93.7	3.3	2.3	9.7	0.0	74.1	0.6	1.0	9.1
GA	98.2	2.0	0.3	5.1	0.0	89.3	0.2	0.3	3.0
HI	85.7	0.0	5.0	0.0	0.0	83.5	0.0	0.0	11.5
ID	100.0	2.2	0.0	29.6	0.0	67.4	0.0	0.0	0.8
IL	95.5	0.5	3.8	38.0	0.3	39.1	0.0	1.7	16.6
IN	94.1	4.3	1.8	41.9	0.2	28.8	0.0	0.9	22.1
IA	100.0	30.5	6.9	7.0	0.0	47.6	2.0	1.3	4.7
KY	92.0	0.3	8.9	50.8	0.0	36.9	0.3	1.3	1.6
LA	94.0	6.9	1.8	7.4	0.0	80.2	1.3	0.4	1.9
ME	95.7	3.4	5.5	31.2	0.0	55.2	1.3	2.4	1.1
MA	88.9	2.0	4.6	34.4	1.8	58.1	0.0	0.2	2.8
MI	91.8	4.3	2.3	24.1	0.5	59.5	0.1	2.5	6.7
MN	92.1	14.1	6.1	38.1	2.0	35.7	0.0	0.5	3.4
MS	100.0	0.6	0.0	11.2	0.0	24.3	0.0	2.2	61.6
MO	94.1	8.1	17.0	17.3	0.0	48.3	0.6	8.7	0.1
MT	90.9	64.5	12.4	2.5	0.0	20.0	0.2	0.2	0.2
NE	100.0	0.8	0.4	17.1	9.6	62.3	2.1	2.5	5.2
NV	100.0	1.4	0.0	40.8	0.0	43.1	0.0	0.0	14.7
NH	87.5	0.2	0.8	2.4	0.1	94.4	0.0	1.2	0.9
NJ	93.8	0.4	0.6	18.1	0.0	71.3	0.0	2.1	7.5
NM	94.1	1.9	18.6	18.1	0.0	56.6	1.4	2.6	0.9
NY	88.8	4.0	3.4	15.4	1.7	66.2	1.5	0.4	7.4
NC	95.8	0.5	0.4	17.6	0.0	56.4	0.0	1.7	23.4
ND	100.0	23.9	12.3	16.1	0.0	42.8	1.2	2.5	1.2
OH	90.1	2.6	7.5	52.5	0.0	35.1	0.0	0.2	2.1
OK	73.3	0.1	0.0	5.5	0.0	94.0	0.0	0.4	0.0
OR	91.2	25.5	5.6	10.9	0.3	50.2	0.2	1.8	5.6
PA	95.5	3.4	2.8	29.8	0.0	48.4	0.2	2.3	13.1
RI	100.0	3.0	4.9	60.8	0.0	29.4	0.0	0.9	1.0
SC	94.1	64.3	0.0	10.2	0.0	24.5	0.0	0.0	1.0
SD	81.3	4.8	8.3	18.2	14.3	27.3	0.0	0.0	27.2
TN	95.8	23.1	1.3	17.0	1.8	42.4	0.2	1.0	13.2
TX	93.9	6.5	0.4	1.9	0.0	84.7	0.2	0.3	6.2
UT	90.9	26.3	2.8	11.3	0.0	48.3	0.0	6.3	5.1
VT	93.8	4.7	12.6	23.7	0.0	36.6	0.0	0.0	22.4
VA	94.1	4.0	0.7	24.8	0.1	59.8	0.1	9.2	1.4
WA	95.8	26.1	1.5	24.6	0.7	39.4	0.3	0.0	7.5
WV	96.7	2.8	0.7	9.2	0.0	45.7	0.0	0.1	41.6
WY	83.3	4.1	7.9	37.7	0.0	49.7	0.0	0.0	0.6
Total	93.2	7.2	2.8	16.3	0.4	63.3	0.4	1.4	8.3

<sup>a</sup> Percentages based on respondents who provided information for this question.

<sup>b</sup> Weighted by total annual sales.

Source: Mail survey conducted in 2004.

**Table 13. Source of Seedlings, Whips, Grafts, and Liners for Nursery Firms, by Origin and Destination State, 2003 (Page 1 of 3)**

Receiving State	Response Rate <sup>a</sup>	Origin states															
		AL	AZ	AR	CA	CO	CT	DE	FL	GA	HI	ID	IL	IN	IA	KS	KY
	percent	percent <sup>b</sup>															
AR	71.4	0.2		49.3					4.5	3.5		5.0		0.3			
CA	81.7		0.6	<0.1	74.3	0.1			1.2		0.8		0.2				
CO	94.1				3.2	23.7			0.9			9.7	1.1	0.2	5.6		0.2
CT	78.3				3.6		45.8		1.4								
DE	88.0				1.8			16.7	2.7					4.5	1.4		
FL	88.2	0.4	0.2	<0.1	1.1	0.1	<0.1		87.3	1.2	0.5		0.1	<0.1			
GA	89.3	6.1							14.3	54.9							
HI	71.4				1.0				0.8		70.4						
ID	92.9				16.9				1.2		6.2	53.1	0.4				
IL	92.0				0.9				1.1	0.2	0.2		14.2	6.4	1.7		0.1
IN	94.1				0.9				0.3	0.3		0.3	0.6	29.1	3.4		2.2
IA	87.5					4.5			4.8	0.5			1.0		45.0		
KY	88.0	4.8			1.6				4.5					0.2	1.4		22.7
LA	90.0	4.8	0.1	0.2	2.1	0.2			13.5	2.2	0.7		0.4	0.2			
ME	80.4				0.7		2.7		3.0				2.4	1.1	1.6		
MA	94.4				3.2		2.4		0.6	1.3							
MI	89.8				0.8				2.2	0.1		0.1	1.2	0.4	0.8		0.1
MN	100.0	0.3			1.6				0.3				0.8		1.6	0.1	
MS	88.9	14.7			2.4	4.1			15.6	2.1							
MO	82.4	0.7			1.4				7.0				2.1				
MT	81.8				3.9	6.1			0.6			4.2			9.8		
NE	88.0				0.7	1.1			0.2			0.9	1.4		12.0	0.2	
NV	70.0	0.1	13.2	2.8	32.5							4.2					
NH	87.5				1.9		2.1		2.9		1.4		1.4		1.6		
NJ	93.8	0.3			1.6				2.1	0.3	0.2		0.4		0.6		
NM	82.4			0.4	14.5	1.2			0.4						4.3		
NY	85.4				1.3	0.5	1.1		3.6	0.1		0.2	0.5	0.2	0.3		
NC	89.5	2.7			1.5	0.8			3.7	5.0				0.1			
ND	92.3				1.9	2.5											
OH	86.8				0.6	0.2	0.8		1.5			<0.1	0.2	1.3	0.9		0.1
OK	86.7			1.2	15.2	4.6			0.8	1.9			0.8			4.6	
OR	88.5			<0.1	6.7	0.3	<0.1		0.6			0.1	0.1		0.1		
PA	87.8				1.5	0.1	1.0	0.1	0.8	<0.1	0.5	<0.1		0.1	0.8		
RI	83.3						3.2	1.1		1.6					12.1		
SC	79.4	1.5			1.3	1.9	3.7		10.4	6.1							
SD	87.5					4.6			1.4					0.4	14.6		
TN	88.5	4.4			1.6				3.5	2.5	0.3		0.2	<0.1	0.3		0.2
TX	75.8	0.1	1.9		5.0	1.1			5.9	0.2			0.4		0.2		
UT	86.4				10.9	2.3			2.1			3.4			2.6		
VT	87.5						1.1						2.5		4.6		
VA	88.2				3.2	0.3			3.6	1.3					1.6		
WA	83.3				5.5		1.5		1.6	0.3		0.5					
WV	100.0				1.3				0.3								
WY	91.7				5.9	23.6			0.9			9.1					
Average	87.7	0.8	0.2	0.5	6.0	0.7	0.8	0.2	20.4	2.2	0.6	0.6	0.9	0.9	1.4	<0.1	0.3

<sup>a</sup> Percentages based on respondents who provided information for this question.

<sup>b</sup> Unweighted simple averages.

Source: Mail survey conducted in 2004.

**Table 13. Source of Seedlings, Whips, Grafts, and Liners for Nursery Firms, by Origin and Destination State, 2003 (Page 2 of 3)**

Receiving States	Origin states																	
	LA	ME	MD	MA	MI	MN	MS	MO	MT	NE	NV	NH	NJ	NM	NY	NC	ND	OH
	percent <sup>a</sup>																	
AR	0.3				2.3			2.0		0.5					0.1			
CA			<0.1		0.2				0.6					0.4	0.4	0.2		0.8
CO					1.3	7.4		0.1	5.0					0.7				
CT				5.8	5.8	0.3	0.3			<0.1			0.6		3.1	0.6		4.7
DE	<0.1	12.8	12.0		2.0			3.2				0.9	4.9	0.5		0.6		
FL	0.1				0.1		0.3		<0.1						0.3	0.1		0.1
GA	0.1	0.5	0.1		1.0		0.7	0.4					0.2			0.7		0.3
HI																		
ID					3.5	2.9			5.3							0.8	0.4	
IL			0.2		15.3	3.4		3.6	2.4				0.1			0.6		1.2
IN	0.8			2.2	10.7	5.6		0.2	0.3						1.3			4.7
IA		1.4			7.9	7.4	0.5	2.4	1.0	2.6						1.0		0.5
KY				0.9	2.6	0.7		3.4								3.6		1.6
LA	53.0				1.8		1.1									1.6		0.7
ME		37.8	2.2	4.8	7.3	3.5			0.3			5.0	0.3		6.8			1.9
MA		7.9	1.5	20.1	4.5	2.9						5.0	5.6		2.4			3.1
MI		<0.1			62.2	3.0		0.6	1.2	0.2			0.1		1.7	0.4		2.0
MN		0.7	0.1		7.5	56.0			1.3	0.8			0.8				0.8	
MS	7.4		1.5				24.8											1.2
MO	7.4				7.0			32.7								4.6		0.7
MT				5.6	0.3	6.7			22.2									2.2
NE					4.8	5.5		1.6	0.9	38.8						1.4	1.4	2.0
NV											10.7							2.8
NH			0.4	2.5	2.4	8.9						44.1	2.1			0.1		1.8
NJ		0.8	2.8	0.3	3.2	1.3				0.2		0.3	41.4		0.6	1.0		1.5
NM	1.8								3.6					33.1	7.1	1.8		
NY		2.7	1.1	2.4	7.6	0.8		0.1	0.1	<0.1		2.1	4.1		40.2	0.3	0.3	4.3
NC	1.1	0.2		0.1	1.7	0.2	0.2	0.1					1.5			44.8		
ND					0.2	29.2			2.7			2.5					57.3	
OH	<0.1	0.4	0.2	0.2	17.6	0.9					<0.1		0.1		0.1	0.8		30.8
OK	7.3				0.4	0.4			0.2	2.3						0.4		1.5
OR		<0.1	<0.1	0.2	1.6	0.4		0.2	0.8	<0.1			0.2	<0.1				0.5
PA		1.1	0.6	0.8	2.7	0.4		0.2	1.2		0.3	0.5	3.5		1.8	0.4		1.7
RI		17.9		6.1									5.8		6.2	2.1		1.1
SC	1.5				4.8	1.7		3.7								8.0	0.2	0.7
SD					9.3	25.4			7.9			1.8						
TN	0.3		0.5		2.1		0.6	0.4	0.8				<0.1		0.5	2.6		1.5
TX	3.5	1.2	0.4		3.1						0.1	<0.1		0.2		0.6		0.5
UT		0.5			2.4	2.5			9.3	1.3		0.5						
VT		17.1			3.2	19.3			2.1			5.0	2.9		1.8			6.1
VA			0.7	0.7	4.6	0.4		1.2	1.2				0.2		0.4	7.5		0.3
WA					6.2				0.5				1.0		1.0			
WV			3.3		2.3								0.4			1.8		1.9
WY					14.5	4.5				0.9						8.6		
Average	1.5	1.5	0.5	0.7	6.7	2.5	0.3	0.7	0.8	0.5	0.1	0.7	2.0	0.3	3.6	2.7	0.4	2.7

<sup>a</sup> Unweighted simple averages  
Source: Mail survey conducted in 2004.

**Table 13. Source of Seedlings, Whips, Grafts, and Liners for Nursery Firms, by Origin and Destination State, 2003 (Page 3 of 3)**

Receiving State	Origin states															Import	
	OK	OR	PA	RI	SC	SD	TN	TX	UT	VT	VA	WA	WV	WI	WY	CN	Other
	percent <sup>a</sup>																
AR	2.5	7.5	2.8		<0.1		6.8	1.3				10.5					
CA		9.9	0.2				0.1	0.8	<0.1		0.4	1.5				0.5	3.3
CO	0.6	23.3	1.9		0.3							1.6		3.4			2.5
CT	0.6	5.6	16.3							0.6		0.4				0.8	0.8
DE		1.6	31.1		0.5		1.8							0.4			
FL	<0.1	0.1	0.1		0.1		0.5	0.5				<0.1		0.1		0.2	5.7
GA		7.4	0.6	0.4	1.6		6.7	1.7			0.2	0.5					0.2
HI																	27.8
ID		2.2										1.5				0.8	3.1
IL	0.4	25.5	11.2				4.6	0.1				0.6		2.9	<0.1		0.7
IN		28.4	6.5				1.1							1.1			
IA	0.5	9.3	0.7				1.9							2.4			1.4
KY		18.6	0.2		4.5		26.4	1.1								0.9	
LA	0.2	2.0	0.4		0.7		5.4	4.5									2.1
ME		1.5	3.4	0.2							<0.1	0.5				9.9	
MA		8.4	8.8	0.6			0.6					3.8				2.6	4.6
MI		11.3	2.1				1.7			0.1		0.8		1.6		1.2	2.7
MN	0.4	17.2				0.3						1.2		7.7		0.4	0.1
MS		3.2	0.6				3.5	13.1				1.5					
MO	3.9	15.5	0.7		2.1		5.3	7.0						1.1			
MT		23.9										6.0		0.6			1.1
NE		13.5	1.1		1.6							2.5		3.6	1.8		
NV		18.1					2.1	3.5	0.4			9.7					
NH		4.8	2.1	0.4	1.4											1.1	7.9
NJ	0.4	15.8	14.8				4.1				0.3	0.8					1.5
NM	5.0	17.5	0.7				1.1	2.6	0.4								
NY		6.5	10.2	0.1	0.4		0.6	0.2	<0.1	0.1		1.2		0.4		2.6	2.1
NC	0.8	9.9	2.5		2.0		8.4	1.6			0.6	5.8	0.9	0.1		0.2	
ND		0.8	2.1									0.8				0.1	
OH		13.3	24.6		<0.1		1.6	0.2			0.1	1.4	0.2	0.2	0.1		0.3
OK	35.2	12.5					3.2	6.3									
OR		77.0	0.2		0.4		0.4	0.2			0.2	4.4		0.5		1.3	2.1
PA		12.4	57.9		0.1		2.0	0.1			0.5	1.3	1.5	<0.1		0.8	1.3
RI	3.2	9.5	5.3	20.0			3.2					0.3					
SC		2.8	1.9		37.6		5.3	3.7									
SD		8.1	0.4			15.1								8.6	2.5		
TN	0.3	12.0	1.4		0.7	0.3	56.1	2.2			0.1	0.8				1.5	0.5
TX	0.6	0.8	1.8		0.4		2.5	65.0				<0.1				1.8	1.6
UT	0.5	15.5	0.8					0.4	33.9			9.5					
VT		9.6	2.1							16.1		2.9				0.4	2.5
VA	0.2	25.5	8.6		0.4		5.4	0.9			23.2	0.6					
WA		16.5	0.1									58.4					1.7
WV		8.8	32.9		<0.1		5.3				4.1		35.9				
WY		5.0													26.8		
Average	0.4	13.8	8.6	<0.1	0.8	0.1	4.6	2.4	0.3	0.1	0.7	1.9	0.7	0.6	0.2		

<sup>a</sup> Unweighted simple averages  
Source: Mail survey conducted in 2004.

**Table 14. Number of Trade Shows Attended Annually by Nursery Operators, 2003**

State	Response rate <sup>a</sup>	With an exhibit		Without an exhibit	
		Average	Maximum	Average	Maximum
	percent	number			
AR	32.1	0.4	1	0.9	3
CA	26.2	2.1	10	0.8	5
CO	70.6	0.5	1	0.6	2
CT	39.1	2.6	10	1.9	4
DE	20.0	1.0	3	1.4	5
FL	43.3	1.9	26	1.3	12
GA	51.8	2.9	21	1.6	7
HI	28.6	2.0	7	1.0	2
ID	50.0	2.0	4	1.7	6
IL	33.0	1.1	10	1.4	10
IN	38.2	1.2	6	1.5	4
IA	33.3	0.8	1	0.5	2
KY	52.0	1.2	4	1.4	6
LA	38.0	1.8	8	1.2	6
ME	15.2	1.6	5	2.0	5
MA	38.9	4.0	9	2.1	6
MI	33.7	4.8	85	1.6	5
MN	65.8	3.3	23	1.1	5
MS	31.6	1.7	4	1.5	3
MO	29.4	1.6	6	1.6	4
MT	63.6	2.9	14	1.0	5
NE	36.0	0.8	3	1.7	5
NV	9.1	2.0	2	0.0	0
NH	43.8	1.0	5	2.9	10
NJ	42.2	2.0	12	1.3	6
NM	35.3	2.0	8	0.8	4
NY	28.7	1.3	10	1.8	7
NC	63.2	2.8	22	1.1	5
ND	38.5	1.0	2	2.2	4
OH	33.1	1.1	10	1.3	4
OK	53.3	3.4	14	1.6	6
OR	42.6	3.6	27	0.9	12
PA	29.5	2.0	20	1.0	5
RI	25.0	1.0	2	2.7	4
SC	41.2	1.3	7	0.8	2
SD	37.5	0.7	3	1.3	3
TN	45.8	2.3	8	1.1	4
TX	51.5	1.4	4	0.8	4
UT	45.5	1.2	5	1.2	3
VT	37.5	1.2	2	1.7	5
VA	49.0	2.1	5	1.5	11
WA	20.8	2.4	4	0.2	1
WV	16.7	1.2	3	2.0	3
WY	25.0	0.3	1	1.3	2
Total	38.8	2.1	85	1.3	12

<sup>a</sup> Respondents who indicated they participated in a trade show either with or without an exhibit.

Source: Mail survey conducted in 2004.

**Table 15. Share of Nursery Sales to Repeat Customers, 2003**

State	Response rate <sup>a</sup>	Average <sup>b</sup>	State	Response rate <sup>a</sup>	Average <sup>b</sup>
	percent			percent	
AR	89.3	64.0	NH	100.0	71.0
CA	96.8	89.1	NJ	93.8	88.0
CO	94.1	66.7	NM	100.0	85.0
CT	100.0	92.1	NY	94.9	81.4
DE	76.0	81.5	NC	96.8	80.5
FL	95.0	85.8	ND	100.0	83.2
GA	98.2	85.8	OH	94.2	72.9
HI	92.9	73.8	OK	80.0	86.6
ID	100.0	89.2	OR	94.6	87.8
IL	98.9	82.0	PA	96.2	78.9
IN	94.1	66.9	RI	100.0	85.0
IA	100.0	66.7	SC	100.0	60.4
KY	100.0	76.8	SD	81.2	57.1
LA	96.0	80.0	TN	97.9	81.2
ME	97.9	82.5	TX	97.0	85.1
MA	94.4	68.2	UT	95.4	73.8
MI	93.8	69.5	VT	93.8	69.7
MN	94.8	66.7	VA	96.1	79.9
MS	94.7	80.7	WA	95.8	88.2
MO	100.0	62.4	WV	96.7	65.5
MT	90.9	77.4	WY	91.7	83.7
NE	100.0	73.0			
NV	100.0	83.0	Total	95.5	81.8

<sup>a</sup> Percent of respondents who provided information for this question.

<sup>b</sup> Weighted by total annual sales.

Source: Mail survey conducted in 2004.

**Table 16. Publish Discount Information for Large Volume Purchases by State, 2003**

State	Yes	No	State	Yes	No
	percent <sup>a</sup>			percent <sup>a</sup>	
Arkansas	27.5	72.5	New Hampshire	31.3	68.7
California	19.8	80.2	New Jersey	21.9	78.1
Colorado	35.3	64.7	New Mexico	29.4	70.6
Connecticut	26.1	73.9	New York	20.2	79.8
Delaware	16.0	84.0	North Carolina	25.3	74.7
Florida	19.9	80.1	North Dakota	23.1	76.9
Georgia	25.0	75.0	Ohio	18.2	81.8
Hawaii	57.2	42.8	Oklahoma	33.3	66.7
Idaho	28.6	71.4	Oregon	32.4	67.6
Illinois	18.2	81.8	Pennsylvania	22.4	77.6
Indiana	26.5	73.5	Rhode Island	16.7	83.3
Iowa	12.5	87.5	South Carolina	41.2	58.8
Kentucky	16.0	84.0	South Dakota	6.3	93.7
Louisiana	26.0	74.0	Tennessee	20.8	79.2
Maine	10.9	89.1	Texas	19.7	80.3
Massachusetts	38.9	61.1	Utah	40.9	59.1
Michigan	26.5	73.5	Vermont	6.3	93.7
Minnesota	42.1	57.9	Virginia	23.5	76.5
Mississippi	26.3	73.7	Washington	37.5	62.5
Missouri	17.6	82.4	West Virginia	16.7	83.3
Montana	27.3	72.3	Wyoming	16.7	83.3
Nebraska	28.0	72.0			
Nevada	18.2	81.8	Total	23.1	76.9

<sup>a</sup> A missing response to this question was interpreted as an answer of "no" to this question.

Source: Mail survey conducted in 2004.

**Table 17. Percent of Total Nursery Sales Negotiated<sup>a</sup>, 2003**

State	Response rate <sup>b</sup>	Share of total sales <sup>c</sup>	State	Response rate <sup>b</sup>	Share of total sales <sup>c</sup>
	percent			percent	
AR	60.7	28.0	NH	68.8	8.9
CA	65.9	30.8	NJ	54.7	7.6
CO	64.7	13.7	NM	52.9	5.8
CT	56.5	50.8	NY	48.9	19.9
DE	32.0	4.6	NC	72.6	23.8
FL	64.1	34.0	ND	76.9	4.4
GA	58.9	45.5	OH	57.9	8.1
HI	78.6	22.6	OK	46.7	60.5
ID	50.0	19.2	OR	60.1	29.1
IL	59.1	11.1	PA	52.6	8.3
IN	67.6	5.4	RI	50.0	4.0
IA	70.8	14.0	SC	70.6	16.1
KY	56.0	20.5	SD	50.0	12.5
LA	58.0	14.1	TN	65.6	51.5
ME	37.0	5.3	TX	62.1	56.5
MA	55.6	6.0	UT	54.5	15.4
MI	60.2	20.7	VT	31.3	9.3
MN	73.7	13.7	VA	60.8	23.9
MS	68.4	5.6	WA	66.7	20.9
MO	29.4	8.9	WV	43.3	35.2
MT	54.5	7.6	WY	41.7	42.5
NE	64.0	13.3			
NV	63.6	5.0	Total	59.4	25.9

<sup>a</sup> Negotiated means discussion/debate over price, quality or other terms of sale.

<sup>b</sup> Respondents who reported a nonzero response to this question.

<sup>c</sup> Weighted by total annual sales.

Source: Mail survey conducted in 2004.

**Table 18. Distribution of Sales Transactions by Method, 2003**

State	Response rate <sup>a</sup>	Trade show orders	Telephone orders	In-person orders	Mail orders	Internet sales
	percent	percent <sup>b</sup>				
AR	89.3	1.6	29.3	42.6	21.0	5.5
CA	93.7	0.9	45.4	50.3	2.9	0.5
CO	94.1	1.1	74.9	21.9	0.3	1.8
CT	100.0	4.3	33.7	32.0	5.4	24.6
DE	60.0	4.0	55.5	37.8	1.9	0.8
FL	92.4	4.3	55.3	36.8	2.6	1.0
GA	96.4	3.6	59.1	36.5	0.4	0.4
HI	78.6	2.0	77.4	11.8	3.4	5.4
ID	92.9	4.5	52.5	41.7	0.9	0.4
IL	95.5	2.1	52.3	44.5	1.0	0.2
IN	94.1	7.9	51.1	38.6	2.4	0.1
IA	100.0	0.5	27.7	68.3	2.5	1.1
KY	92.0	3.2	27.2	69.3	0.1	0.3
LA	92.0	4.3	51.5	39.9	3.5	0.9
ME	95.7	0.4	54.4	44.7	0.4	0.2
MA	88.9	2.4	33.6	62.0	0.8	1.2
MI	91.8	2.5	38.7	53.7	2.1	3.1
MN	92.1	4.8	38.0	45.2	9.2	2.9
MS	100.0	0.7	16.7	82.3	0.1	0.3
MO	88.2	2.6	3.4	86.5	4.7	2.8
MT	90.9	1.3	35.3	23.6	35.6	4.2
NE	96.0	3.0	18.3	77.5	1.1	0.2
NV	100.0	0.1	69.2	24.9	0.2	5.6
NH	100.0	0.2	38.2	33.6	14.1	13.8
NJ	90.6	8.5	48.0	33.9	7.9	1.7
NM	94.1	5.0	35.6	55.5	1.3	2.6
NY	89.3	5.4	34.2	55.4	1.5	3.5
NC	95.8	8.4	69.9	19.5	1.9	0.3
ND	100.0	2.6	17.4	63.2	16.0	0.9
OH	90.1	2.9	42.1	51.9	2.7	0.4
OK	73.3	3.5	17.4	79.1	0.0	0.0
OR	93.2	5.4	42.0	42.8	8.3	1.5
PA	91.0	4.2	34.3	54.9	5.3	1.4
RI	100.0	0.4	32.2	60.7	6.6	0.0
SC	97.1	0.6	24.6	55.2	19.3	0.3
SD	81.3	1.1	29.2	60.9	8.1	0.7
TN	96.9	5.2	37.9	48.4	6.3	2.1
TX	93.9	1.6	63.4	32.9	1.6	0.6
UT	95.5	7.9	47.9	43.2	0.2	0.7
VT	93.8	0.7	30.9	66.2	1.9	0.3
VA	94.1	8.7	43.5	42.4	3.4	2.1
WA	91.7	2.3	72.0	20.8	4.3	0.7
WV	93.3	17.1	25.6	53.0	3.8	0.6
WY	83.3	0.0	37.6	62.4	0.0	0.0
Average	92.5	4.3	46.1	44.0	3.8	1.9

<sup>a</sup> Percent of respondents who provided information for this question.

<sup>b</sup> Weighted by total annual sales.

Source: Mail survey conducted in 2004.

**Table 19. Share of Nursery Sales Allocated to Advertising, 2003**

State	Response rate <sup>a</sup>	Average <sup>b</sup>	State	Response rate <sup>a</sup>	Average <sup>b</sup>
	percent			percent	
Arkansas	75.0	2.7	New Hampshire	100.0	2.9
California	82.5	1.5	New Jersey	90.6	1.9
Colorado	88.2	2.7	New Mexico	100.0	2.4
Connecticut	95.7	3.2	New York	86.5	4.6
Delaware	68.0	2.7	North Carolina	90.5	4.4
Florida	83.6	2.3	North Dakota	100.0	3.4
Georgia	87.5	2.3	Ohio	81.8	3.1
Hawaii	85.7	0.6	Oklahoma	80.0	1.8
Idaho	92.9	2.4	Oregon	85.1	1.6
Illinois	90.9	2.2	Pennsylvania	89.1	3.0
Indiana	94.1	2.6	Rhode Island	91.7	8.2
Iowa	66.7	4.0	South Carolina	88.2	8.7
Kentucky	80.0	2.4	South Dakota	81.3	2.6
Louisiana	92.0	5.2	Tennessee	87.5	7.2
Maine	89.1	2.9	Texas	81.8	3.0
Massachusetts	83.3	3.1	Utah	81.8	3.6
Michigan	86.7	3.8	Vermont	87.5	2.8
Minnesota	89.5	3.9	Virginia	88.2	2.0
Mississippi	94.7	15.3	Washington	83.3	1.7
Missouri	76.5	5.8	West Virginia	76.7	2.8
Montana	81.8	6.5	Wyoming	83.3	1.9
Nebraska	92.0	4.6			
Nevada	81.8	3.5	Total	85.9	3.6

<sup>a</sup> Percentages based on respondents who provided information for this question.

<sup>b</sup> Weighted by total annual sales.

Source: Mail survey conducted in 2004.

**Table 20. Distribution of Advertising Budget by Media, by State, 2003**

State	Response rate <sup>a</sup>	Web Sites	Yellow Pages	Radio TV	Bill-boards	Gardening magazines	Catalogs	Trade Journals	News-letters	Trade Shows	News-paper	Other
	percent <sup>b</sup>											
AR	60.7	7.8	13.2	9.8	0.0	1.3	25.5	8.8	10.2	14.3	6.6	2.5
CA	57.1	3.6	6.6	0.4	0.1	2.2	7.3	8.3	35.0	16.5	10.8	9.2
CO	76.5	2.9	13.2	1.4	0.0	0.0	53.0	13.3	1.5	10.2	0.2	4.2
CT	73.9	7.3	4.7	0.1	0.0	3.2	33.8	1.0	0.5	44.5	3.3	1.6
DE	36.0	3.4	16.0	4.0	0.0	7.3	9.8	6.7	0.9	0.7	27.1	24.1
FL	61.8	4.4	4.4	1.1	0.1	2.9	7.5	18.9	3.0	43.1	0.6	14.0
GA	71.4	4.5	1.9	0.6	0.0	1.0	13.1	10.7	5.3	27.9	0.7	34.3
HI	50.0	22.9	12.8	0.0	0.0	1.7	6.2	14.6	0.0	17.4	12.2	12.2
ID	71.4	7.5	17.7	16.0	2.2	4.8	13.0	0.9	0.7	18.4	6.9	12.0
IL	76.1	3.3	11.6	12.4	1.6	0.4	26.1	11.2	11.7	11.9	7.1	2.7
IN	79.4	1.8	16.2	11.4	0.0	0.1	20.6	6.7	4.6	9.7	28.2	0.6
IA	83.3	1.2	9.7	25.1	0.0	0.8	18.4	0.0	4.0	3.0	37.0	0.7
KY	84.0	2.7	36.0	6.2	1.2	0.3	33.9	3.0	3.7	6.3	3.7	3.0
LA	68.0	9.5	10.2	5.0	1.3	1.7	9.2	5.9	6.9	43.2	0.6	6.7
ME	67.4	4.3	2.1	7.5	0.6	1.0	59.7	1.7	2.7	7.1	12.5	0.7
MA	83.3	9.6	8.7	17.9	0.1	3.3	8.0	5.3	0.7	18.6	27.8	0.0
MI	68.4	6.2	6.7	14.3	0.4	4.2	27.6	8.6	7.9	10.7	11.4	1.9
MN	84.2	5.6	12.4	3.0	0.7	0.9	32.6	9.6	6.2	16.3	8.7	4.0
MS	72.2	1.2	2.1	2.3	0.0	0.4	3.6	0.0	1.9	7.7	2.1	78.7
MO	70.6	0.7	5.3	75.5	0.0	0.0	0.6	4.5	0.0	4.5	5.0	3.9
MT	81.8	3.3	0.5	12.9	0.0	0.0	8.1	12.3	34.9	5.7	10.1	12.0
NE	92.0	0.8	14.9	28.7	0.7	3.3	6.6	0.0	10.7	1.6	31.0	1.8
NV	80.0	4.7	8.2	10.4	0.1	0.8	69.3	0.3	0.0	1.6	0.0	4.6
NH	81.3	4.3	0.9	2.3	1.8	9.5	34.9	15.5	6.6	11.7	12.2	0.3
NJ	67.2	2.3	5.7	0.2	0.4	13.7	48.2	3.5	1.9	20.1	1.2	2.8
NM	100.0	2.0	5.8	3.5	0.0	0.5	35.4	0.7	0.0	27.9	21.7	2.5
NY	71.3	7.7	5.1	6.3	1.0	3.2	34.0	2.4	5.5	9.5	13.3	12.0
NC	74.7	6.2	7.9	2.2	0.2	1.2	20.5	3.5	1.3	36.0	19.9	1.1
ND	84.6	0.6	8.2	37.7	0.0	1.9	20.9	1.6	0.9	4.3	22.6	1.3
OH	73.6	11.1	14.3	5.9	0.3	7.8	18.4	5.3	4.6	20.1	5.7	6.5
OK	53.3	0.5	1.9	0.3	0.0	0.0	52.2	8.4	0.4	34.1	0.2	2.0
OR	69.6	4.5	1.8	0.3	0.1	2.4	27.6	16.7	3.8	31.4	1.0	10.4
PA	70.5	5.7	7.5	0.7	0.8	7.2	30.6	8.6	5.4	13.0	9.7	10.9
RI	75.0	1.1	6.2	0.0	0.0	1.1	34.7	10.1	10.1	34.2	2.4	0.1
SC	82.4	3.6	2.2	2.0	0.3	0.4	79.1	2.1	3.3	4.0	1.7	1.3
SD	81.3	2.1	18.8	26.4	1.0	1.6	5.3	3.8	3.9	4.2	25.0	7.9
TN	65.6	6.8	6.5	6.4	0.3	7.3	20.7	4.6	3.8	36.6	4.1	2.9
TX	72.7	2.2	4.2	4.3	0.1	8.9	8.1	3.2	1.8	43.2	3.8	20.3
UT	81.8	1.6	22.4	19.1	0.0	0.8	3.8	8.0	9.7	20.3	13.7	0.7
VT	75.0	4.5	5.3	4.0	0.0	5.3	23.2	5.0	8.0	2.2	39.3	3.3
VA	74.5	2.3	3.2	0.1	0.0	5.8	38.0	6.3	2.6	31.5	3.0	7.1
WA	62.5	1.4	7.8	1.0	0.0	2.6	9.8	7.8	16.9	24.5	1.6	26.6
WV	70.0	21.1	2.9	18.2	0.0	23.6	7.3	0.6	6.1	9.0	3.8	7.3
WY	66.7	0.0	3.1	31.5	0.0	0.0	21.4	0.0	3.7	0.0	33.0	7.3
Total	69.4	4.9	6.3	4.8	0.3	3.8	22.5	9.3	5.7	25.6	6.9	9.8

<sup>a</sup> Percentages based on respondents who provided information for this question.

<sup>b</sup> Weighted by total annual sales.

Source: Mail survey conducted in 2004.

**Table 21. Distribution of Sales by Retail and Wholesale Outlets, 2003**

State	Response rate <sup>a</sup>	Sales		Firms	
		Wholesale	Retail	Wholesale	Retail
	percent	percent of sales <sup>b</sup>		percent of firms	
AR	89.3	38.2	61.8	60.7	75.0
CA	93.7	87.2	12.8	73.8	56.3
CO	94.1	95.8	4.2	94.1	52.9
CT	100.0	88.7	11.3	73.9	73.9
DE	68.0	68.3	31.7	40.0	52.0
FL	92.6	90.6	9.4	84.2	35.3
GA	96.4	93.8	6.2	89.3	60.7
HI	85.7	85.5	14.5	85.7	50.0
ID	92.9	83.5	16.5	85.7	50.0
IL	97.7	64.1	35.9	69.3	77.3
IN	94.1	56.1	43.9	76.5	82.4
IA	95.8	20.5	79.5	45.8	87.5
KY	100.0	61.5	38.5	76.0	76.0
LA	94.0	75.2	24.8	76.0	54.0
ME	93.5	68.4	31.6	54.3	84.8
MA	94.4	51.9	48.2	77.8	77.8
MI	92.9	72.3	27.7	75.5	72.4
MN	92.1	65.5	34.5	71.1	57.9
MS	100.0	19.7	80.3	55.6	61.1
MO	100.0	36.2	63.8	70.6	76.5
MT	81.8	76.0	24.0	54.5	54.5
NE	96.0	17.2	82.8	56.0	92.0
NV	100.0	84.9	15.1	80.0	100.0
NH	100.0	73.8	26.2	81.3	87.5
NJ	93.8	89.2	10.8	84.4	48.4
NM	94.1	68.8	31.2	70.6	58.8
NY	93.8	71.2	28.9	68.5	72.5
NC	95.8	90.5	9.5	87.4	54.7
ND	100.0	31.5	68.5	76.9	76.9
OH	92.6	80.8	19.2	71.9	70.2
OK	73.3	98.2	1.8	60.0	40.0
OR	94.6	93.3	6.7	76.4	44.6
PA	92.9	76.2	23.8	74.4	65.4
RI	100.0	91.4	8.7	91.7	83.3
SC	100.0	29.0	71.0	67.6	79.4
SD	81.3	15.6	84.4	75.0	75.0
TN	96.9	90.1	9.9	82.3	43.8
TX	93.9	76.6	23.4	77.3	62.1
UT	95.5	52.7	47.3	72.7	81.8
VT	93.8	37.4	62.6	68.8	62.5
VA	94.1	86.9	13.2	80.4	54.9
WA	91.7	88.1	11.9	83.3	50.0
WV	96.7	37.6	62.4	56.7	83.3
WY	91.7	25.5	74.5	50.0	75.0
Total	93.8	80.4	19.6	75.7	58.7

<sup>a</sup> Percentages based on respondents who provided information for this question.

<sup>b</sup> Weighted by total annual sales.

Source: Mail survey conducted in 2004.

**Table 22. Distribution of Wholesale Sales by Outlet Type, 2003**

State	Response rate <sup>a</sup>	Mass Merchandiser		Home Centers		Garden Center				Landscape Firms		Re-Wholesalers	
		Sales	Firms	Sales	Firms	Single Location		Multiple Location		Sales	Firms	Sales	Firms
	Sales					Firms	Sales	Firms					
	percent	percent <sup>b</sup>											
AR	60.7	0.0	0.0	0.3	3.6	20.9	21.4	13.4	7.1	43.3	35.7	22.1	25.0
CA	72.2	8.4	10.3	34.7	15.1	9.3	31.0	4.3	16.7	26.4	40.5	16.9	41.3
CO	94.1	1.0	11.8	0.0	0.0	6.2	41.2	0.5	11.8	86.5	82.4	5.8	58.8
CT	69.6	25.5	21.7	36.7	21.7	10.4	52.2	8.3	30.4	13.5	52.2	5.5	39.1
DE	44.0	0.0	0.0	3.0	8.0	10.1	16.0	0.4	8.0	47.9	28.0	38.7	20.0
FL	80.9	10.8	9.9	10.0	10.1	11.8	33.4	4.6	17.4	28.8	54.4	34.1	62.0
GA	89.3	6.8	8.9	32.3	14.3	10.4	57.1	6.0	19.6	25.6	66.1	18.8	55.4
HI	92.9	8.6	35.7	1.9	14.3	2.8	35.7	1.4	14.3	0.4	7.1	94.9	64.3
ID	71.4	15.6	14.3	2.8	7.1	28.2	42.9	11.3	28.6	24.3	42.9	17.8	57.1
IL	69.3	0.1	1.1	0.8	2.3	14.7	30.7	3.8	9.1	67.6	61.4	13.1	35.2
IN	76.5	0.0	0.0	0.1	2.9	20.6	29.4	4.0	20.6	47.7	67.6	27.7	47.1
IA	37.5	5.1	4.2	0.0	0.0	14.5	16.7	6.1	8.3	60.6	29.2	13.7	16.7
KY	64.0	0.8	4.0	0.0	4.0	8.4	44.0	3.7	8.0	70.4	56.0	16.8	36.0
LA	78.0	8.9	12.0	2.5	8.0	14.6	38.0	5.9	26.0	30.2	54.0	38.0	52.0
ME	52.2	1.8	8.7	1.0	8.7	11.9	30.4	0.0	2.2	77.6	30.4	7.6	8.7
MA	72.2	0.1	5.6	0.7	5.6	14.9	50.0	4.8	22.2	74.7	55.6	4.8	33.3
MI	73.5	8.0	6.1	3.0	5.1	10.3	31.6	3.5	11.2	53.0	59.2	22.1	32.7
MN	68.4	0.1	2.6	0.1	2.6	10.8	34.2	3.3	18.4	67.3	63.2	18.5	42.1
MS	52.6	0.0	0.0	5.9	10.5	34.0	47.4	2.7	21.1	23.7	42.1	33.6	21.1
MO	70.6	0.0	0.0	0.0	5.9	6.1	47.1	4.9	11.8	88.6	47.1	0.3	17.6
MT	54.5	8.7	9.1	2.4	18.2	4.8	27.3	0.8	18.2	25.0	36.4	58.4	36.4
NE	56.0	0.0	0.0	0.0	0.0	14.4	16.0	1.1	12.0	75.4	40.0	9.2	36.0
NV	72.7	0.9	9.1	0.1	9.1	12.8	54.5	0.6	27.3	69.6	63.6	16.1	27.3
NH	81.3	0.0	0.0	5.1	18.8	22.3	25.0	6.7	12.5	18.3	68.8	47.6	18.8
NJ	82.8	4.6	4.7	5.1	6.3	35.5	51.6	6.3	23.4	23.4	71.9	25.1	45.3
NM	70.6	0.7	5.9	2.5	17.6	9.0	41.2	9.2	11.8	39.8	47.1	38.9	35.3
NY	65.7	9.8	8.4	18.9	6.7	13.5	42.7	3.3	15.7	41.9	38.8	12.7	32.0
NC	86.3	11.9	9.5	11.4	14.7	14.8	53.7	6.3	31.6	42.9	69.5	12.7	68.4
ND	76.9	3.6	7.7	4.4	23.1	34.2	53.8	0.4	7.7	12.7	30.8	44.7	38.5
OH	67.8	2.2	3.3	0.6	5.0	9.3	34.7	13.9	15.7	46.9	56.2	27.0	32.2
OK	60.0	3.6	13.3	3.3	13.3	38.8	46.7	12.7	26.7	30.8	53.3	10.8	26.7
OR	71.6	11.8	15.5	3.3	11.5	21.7	41.2	7.3	28.4	7.1	37.8	48.7	56.8
PA	74.4	1.0	4.5	0.7	5.8	27.5	44.2	11.9	19.9	33.7	51.9	25.2	38.5
RI	91.7	0.0	0.0	0.0	0.0	20.3	41.7	3.4	25.0	41.1	83.3	35.2	25.0
SC	58.8	22.2	5.9	9.5	2.9	12.3	29.4	1.0	11.8	42.1	50.0	12.9	32.4
SD	75.0	0.0	0.0	1.4	6.3	10.0	18.8	0.0	0.0	80.6	50.0	8.1	25.0
TN	82.3	17.0	12.5	20.3	18.8	16.4	50.0	2.7	19.8	13.8	49.0	29.8	56.3
TX	75.8	20.0	13.6	28.9	12.1	9.1	37.9	5.2	28.8	18.6	50.0	18.2	50.0
UT	68.2	0.9	9.1	1.7	9.1	5.5	45.5	7.5	13.6	83.4	59.1	0.9	22.7
VT	68.8	0.0	0.0	0.0	0.0	23.6	31.3	2.0	6.3	43.1	62.5	31.3	43.8
VA	80.4	3.1	7.8	2.5	3.9	18.1	54.9	9.0	29.4	42.1	68.6	25.4	45.1
WA	83.3	10.8	25.0	5.4	12.5	27.9	45.8	8.0	25.0	9.7	45.8	38.2	45.8
WV	56.7	1.9	6.7	0.3	6.7	54.8	36.7	6.7	13.3	12.8	30.0	23.6	26.7
WY	41.7	8.3	8.3	9.3	8.3	8.3	8.3	0.0	0.0	49.8	8.3	24.3	8.3
Total	--	8.5	--	10.9	--	15.2	--	5.6	--	33.9	--	25.9	--

<sup>a</sup> Percentages based on respondents who provided information for this question.<sup>b</sup> Sales weighted by total annual sales.

Source: Mail survey conducted in 2004.

**Table 23. Nursery Sales to Export Market by State, 2003**

State	Response rate <sup>a</sup>	Share of total sales <sup>b</sup>	State	Response rate <sup>a</sup>	Share of total sales <sup>b</sup>
	percent			percent	
AR	3.6	<0.1	NH	6.3	0.7
CA	11.1	1.0	NJ	1.6	<0.1
CO	0.0	0.0	NM	5.9	0.6
CT	8.7	0.3	NY	4.5	0.1
DE	0.0	0.0	NC	6.3	0.1
FL	16.8	5.0	ND	15.4	0.3
GA	7.1	0.1	OH	2.5	<0.1
HI	28.6	0.7	OK	0.0	0.0
ID	14.3	0.6	OR	25.0	5.5
IL	2.3	0.2	PA	3.8	0.7
IN	2.9	1.0	RI	0.0	0.0
IA	4.2	0.2	SC	0.0	0.0
KY	4.0	0.0	SD	6.3	<0.1
LA	4.0	0.3	TN	5.2	0.2
ME	2.2	0.1	TX	4.5	0.1
MA	5.6	0.1	UT	0.0	0.0
MI	6.1	0.8	VT	6.3	1.3
MN	7.9	0.3	VA	0.0	0.0
MS	0.0	0.0	WA	20.8	1.2
MO	5.9	<0.1	WV	0.0	0.0
MT	9.1	8.2	WY	0.0	0.0
NE	0.0	0.0			
NV	0.0	0.0	Total	8.3	1.8

<sup>a</sup> Percentage of respondents who reported exporting activity.

<sup>b</sup> Weighted by share of total annual sales.

Source: Mail survey conducted in 2004.

**Table 24. Distribution of Sales by Destination, by State, 2003 (page 1 of 4)**

Origin State	Response rate <sup>a</sup>	Destination State											
		AL	AK	AZ	AR	CA	CO	CT	DE	DC	FL	GA	HI
	percent	percent <sup>b</sup>											
AR	82.1	1.7			68.7	0.2						0.4	
CA	88.9			1.9	<0.1	87.1	<0.1				0.3	0.1	
CO	94.1					0.2	96.1						
CT	87.0							79.9					
DE	84.0								78.8				
FL	89.9	0.8		0.2	0.1	1.3	<0.1	0.1	0.0		80.9	2.4	<0.1
GA	91.1	1.8									4.0	78.7	
HI	92.9			0.4		15.4	<0.1				13.9	0.4	42.7
ID	100.0		1.6				5.8						
IL	87.5						<0.1				0.1		
IN	85.3						0.7			0.3	0.1		
IA	87.5						2.0						
KY	88.0												
LA	96.0	1.0			4.1	0.3					0.8	0.9	
ME	87.0							0.3	0.3				
MA	94.4							5.9					
MI	94.9					0.4	0.4				1.2		
MN	92.1						2.0						
MS	83.3	3.2									1.3	3.1	
MO	17.6				1.9						0.6		
MT	81.8					0.7	0.2						
NE	96.0						3.8						
NV	90.0			2.1		7.9		1.0			2.5		
NH	100.0				1.6			1.0					
NJ	92.2							2.3	1.6		1.5		
NM	100.0			1.1		0.3	7.6						
NY	84.3							1.6					
NC	89.5	0.7				0.2		0.2		0.2	1.5	1.3	
ND	92.3						4.5						
OH	91.7						0.1						
OK	73.3				0.5								
OR	89.9	<0.1	<0.1		0.2	3.5	1.6	1.4			0.5	0.4	
PA	92.3	0.1						0.4	0.8	0.2	0.2		
RI	100.0							3.5					
SC	100.0					0.3					0.1	5.3	
SD	93.8												
TN	90.6	1.3			0.3	0.2		<0.1	0.1		0.3	5.0	
TX	89.4				1.0	0.2	0.2				0.9	0.4	
UT	90.9			0.3		0.7	1.3	0.5					
VT	93.8					1.0		3.3			1.3		
VA	92.2							1.2	0.1	0.5			
WA	91.7			0.2		1.1	4.1	1.0				2.3	
WV	86.7					0.8							
WY	100.0						0.8						
Total		0.3	<0.1	0.1	0.9	5.0	1.1	1.2	0.8	<0.1	15.9	2.7	0.2

<sup>a</sup> Percentages based on respondents who provided information for this question.

<sup>b</sup> Weighted by total annual sales.

Source: Mail survey conducted in 2004.

**Table 24. Distribution of Sales by Destination, by State, 2003 (page 2 of 4)**

Origin State	Destination State													
	ID	IL	IN	IA	KS	KY	LA	ME	MD	MA	MI	MN	MS	MO
	percent <sup>a</sup>													
AR		0.2			0.3		1.1			0.2	0.3		0.3	5.2
CA	0.1	0.1	<0.1					<0.1		<0.1				
CO	<0.1													
CT								0.8		5.0				
DE									13.5					
FL		0.6	0.1	<0.1		<0.1	0.2		0.3	0.1	0.3	0.1	0.1	0.1
GA									0.3				0.8	
HI										0.8				
ID	67.0													
IL		90.2	0.1	1.5		0.2	0.3			0.2	0.5	0.1		3.4
IN		7.3	81.7	0.8		1.4				2.6	0.2			
IA		2.7		86.1	0.4						0.7			0.5
KY		0.9	2.1			80.5					0.2			0.5
LA		0.9	0.2				66.0		0.6				5.2	1.2
ME								93.2		0.7				
MA		1.2						3.1		71.2	0.6			
MI		4.2	4.2	0.1	0.1						83.4	0.5		0.1
MN		0.5		0.9	0.3						0.1	87.6		
MS							5.9						69.5	
MO		0.1		0.4	3.8	0.1	0.6				1.6			76.4
MT	12.9													
NE		2.9	0.2	2.0	0.8							0.2		
NV									0.5					
NH								2.9	0.3	7.8				
NJ							<0.1	0.1	1.0	2.3				
NM														
NY		0.3		0.1				0.1	0.1	1.6	0.4	0.1		0.1
NC		0.5				0.4	0.2		1.9	2.8	0.6			0.1
ND	0.4											8.2		
OH		1.6	2.3	0.1		0.4				0.0	1.4			
OK					4.1									1.5
OR	0.8	1.4	0.1		0.2	0.1		0.2	0.4	0.2	0.9	0.3		
PA		0.2	0.1	0.1		<0.1			2.9	1.0	0.8			0.2
RI		0.8						5.0	0.2	13.8	1.3			
SC		0.6		0.3			0.1				0.9			
SD		1.3		3.3						0.3	0.7	9.3		
TN		1.5	2.2		0.2	3.6	0.2		2.0	0.1	1.3		0.6	2.2
TX		0.3			0.2		2.1				0.1		0.7	0.2
UT	5.5									0.5				
VT								1.3		2.7				
VA									7.6	0.8				
WA	2.4									0.9		1.4		0.4
WV						1.2			2.8		0.8			
WY												8.3		
Total	0.6	3.9	1.5	1.0	0.1	1.0	1.6	1.7	0.8	1.2	3.9	1.6	0.7	0.9

<sup>a</sup> Weighted by total annual sales.

Source: Mail survey conducted in 2004.

**Table 24. Distribution of Sales by Destination, by State, 2003 (page 3 of 4)**

Origin State	Destination State													
	MT	NE	NV	NH	NJ	NM	NY	NC	ND	OH	OK	OR	PA	RI
	percent <sup>a</sup>													
AR								0.6			3.8			
CA			1.4		0.3		0.7	0.5		<0.1		1.0	0.3	
CO			0.1			0.8	0.1							
CT				0.8	1.5		5.7						2.0	0.8
DE					3.1		0.6						3.6	
FL			0.2		0.3		1.4	0.5		0.3	<0.1		0.7	
GA					0.1		0.1	4.6					0.1	
HI							3.5	<0.1				0.8		
ID	1.5		0.7									1.5		
IL		0.1		0.1			0.1	0.1		0.3				
IN							0.3			3.9				
IA		3.0												
KY										5.7				
LA							0.1	0.2		1.2	0.5			
ME				2.3			0.2					0.3	0.3	0.5
MA				4.6	0.7		4.8			0.6			0.4	2.1
MI							0.1	0.2		1.2				
MN		0.5	0.3						1.7	0.1				
MS								0.6						
MO		0.3						0.6			0.3			
MT	74.1											1.6		
NE		88.0									0.4			
NV			78.3				1.2							
NH				80.8	0.6		0.9							0.2
NJ				0.4	75.7		4.8			0.2			7.3	0.1
NM						80.9								
NY		0.2		0.3	3.4		84.5			0.3			3.1	0.0
NC					1.2	0.2	2.6	64.3		1.5			1.3	
ND	4.1								73.0					
OH							0.7			90.1			1.5	
OK		0.7				0.7					87.2			
OR	<0.1	0.1	0.6		1.6		1.5	0.8		0.5	0.2	59.6	1.1	
PA				0.1	5.3		3.8	<0.1		2.9			77.0	0.1
RI				0.4			1.8							72.5
SC					0.9		0.9	7.5		0.1				
SD							4.7						1.3	
TN					1.0		0.8	2.7		4.4	1.1	0.1	1.0	
TX	0.1		0.1		0.2	0.6	0.8			<0.1	2.6			
UT	2.2		0.1	0.5			1.0					0.3		
VT	6.0			2.7			9.3							0.3
VA					3.1		6.5	2.4		0.6			3.3	
WA		0.2					0.5					11.4	1.4	
WV					0.8		1.0	<0.1		1.9		0.8	1.5	
WY		1.8												
Total	0.4	1.0	0.5	0.7	2.9	0.6	7.0	3.0	0.4	5.2	0.6	3.7	5.9	0.4

<sup>a</sup> Weighted by total annual sales.

Source: Mail survey conducted in 2004.

**Table 24. Distribution of Sales by Destination, by State, 2003 (page 4 of 4)**

Origin State	Destination State												
	SC	SD	TN	TX	UT	VT	VA	WA	WV	WI	WY	Other <sup>b</sup>	Exports
	percent <sup>a</sup>												
AR			1.7	8.4								6.8	
CA	0.1		0.2	0.4	0.3		<0.1	0.4		<0.1		3.8	0.8
CO											1.5	1.3	
CT												3.9	
DE							0.2					0.2	
FL	1.2		0.3	1.4			0.3		<0.1	0.2		4.2	0.8
GA	3.7	0.4	2.3	0.1			1.0					2.2	
HI				2.3				2.3				17.6	
ID					7.9			1.8			10.1	2.1	
IL				0.1						1.8		0.8	
IN										0.2		0.4	
IA		0.5								0.1		3.0	1.0
KY			3.5									6.6	
LA	0.1		3.4	10.6				0.2				2.2	
ME						0.1		0.3				1.8	
MA						1.7				0.3		2.8	
MI	0.2		0.1	0.3		0.2				1.3		1.8	0.1
MN		1.2								4.2		0.7	
MS			11.3	1.9			0.6	0.3				2.4	
MO			4.4									8.9	
MT								1.9			1.3	7.3	
NE		<0.1								0.4		1.1	
NV	0.3				0.2		3.0					3.0	
NH						0.7						3.4	
NJ							0.3					2.5	
NM				2.9	1.5							4.4	1.2
NY						0.8	0.3			0.1		2.6	0.1
NC	4.3		2.1	0.4			7.6		0.5			3.2	
ND		3.0									5.8	0.9	
OH									<0.1	0.1		1.5	
OK				2.7								2.5	
OR			1.1	0.3	1.6		0.2	9.3		0.2		8.4	0.9
PA	0.1		0.1	0.1	0.1	<0.1	0.4		0.1	<0.1		2.9	
RI												0.8	
SC	80.2		0.9	0.3			0.6					1.1	
SD		78.8				0.3						0.0	
TN	0.3		59.8	1.1			2.5		0.1			3.8	
TX	0.3		0.1	87.2			0.5					1.3	
UT					84.2						2.2	1.0	
VT						68.5						3.5	
VA							69.6		1.1			3.2	
WA					0.5			66.7		3.1		2.6	
WV			<0.1				3.7		83.8			1.2	
WY											89.2	0.0	
Total	1.7	0.6	2.8	3.1	0.9	0.5	2.1	1.3	1.0	0.3	0.6	3.3	0.2

<sup>a</sup> Weighted by total annual sales.

<sup>b</sup> Includes sales to all other states not identified as a top-five destination state.

Source: Mail survey conducted in 2004.

**Table 25. Share of total sales from material handled for other growers and from sales based on contracts prior to planting, 2003**

State	Response rate <sup>a</sup>	Material handled for other growers <sup>b</sup>	Response rate <sup>a</sup>	Share of total sales via contracts <sup>b</sup>
	percent		percent	
AR	53.6	16.1	32.1	10.2
CA	52.4	27.4	32.5	18.5
CO	47.1	38.6	17.6	2.2
CT	60.9	3.1	39.1	13.9
DE	28.0	11.7	20.0	5.2
FL	43.5	10.5	30.5	16.7
GA	55.4	25.7	48.2	15.4
HI	42.9	9.1	14.3	0.7
ID	57.1	3.8	42.9	17.0
IL	52.3	12.2	17.0	3.2
IN	52.9	26.0	20.6	11.4
IA	58.3	22.5	29.2	9.9
KY	52.0	17.6	16.0	3.7
LA	38.0	6.3	30.0	12.1
ME	45.7	69.0	19.6	2.6
MA	66.7	71.7	27.8	5.1
MI	49.0	35.4	26.5	16.2
MN	50.0	18.0	26.3	10.4
MS	42.1	6.4	36.8	3.8
MO	52.9	85.3	47.1	2.6
MT	54.5	5.0	54.5	8.3
NE	48.0	13.9	24.0	15.7
NV	36.4	6.4	27.3	1.5
NH	75.0	16.5	25.0	41.8
NJ	42.2	2.0	21.9	5.3
NM	47.1	23.6	41.2	8.3
NY	50.6	23.8	34.3	27.2
NC	44.2	4.6	26.3	13.3
ND	30.8	7.0	23.1	2.6
OH	38.0	18.2	23.1	6.1
OK	40.0	3.2	40.0	3.6
OR	35.1	8.4	40.5	22.9
PA	42.9	16.3	17.9	5.2
RI	75.0	14.3	8.3	0.1
SC	52.9	4.0	32.4	5.9
SD	56.3	33.9	25.0	6.7
TN	42.7	9.4	30.2	34.5
TX	48.5	17.8	30.3	19.2
UT	59.1	49.2	40.9	9.5
VT	37.5	25.9	12.5	3.7
VA	43.1	15.9	21.6	3.8
WA	41.7	8.3	54.2	21.2
WV	33.3	6.4	16.7	0.8
WY	41.7	56.3	25.0	6.0
Total	45.9	16.6	28.9	14.9

<sup>a</sup> Percentages based on respondents who provided a response greater than zero.

<sup>b</sup> Weighted by total annual sales.

Source: Mail survey conducted in 2004.

**Table 26. Importance of Factors Considered Important to Price Determination by State, 2003**

State	Response rate <sup>a</sup>	Cost of production	Inflation	Other growers' prices	Grade of plants	Market demand	Product uniqueness	Inventory levels	Last year's price
	percent	average rating <sup>b</sup>							
AR	92.9	3.6	1.8	2.5	3.1	3.0	3.2	2.5	2.1
CA	95.2	3.6	2.3	2.9	3.2	3.1	3.2	2.6	2.3
CO	94.1	3.3	2.4	2.9	2.9	2.9	3.1	2.6	2.3
CT	95.7	3.4	2.1	3.0	3.6	3.5	3.4	2.4	2.5
DE	80.0	3.3	2.4	3.1	3.4	3.3	2.8	2.8	2.7
FL	94.5	3.6	2.1	2.9	3.4	3.3	3.0	2.6	2.3
GA	100.0	3.6	2.1	2.8	3.5	3.4	3.2	2.8	2.6
HI	100.0	3.5	2.3	3.1	3.6	3.5	3.4	3.1	2.5
ID	100.0	3.1	2.0	2.8	3.5	2.6	2.6	2.4	2.3
IL	96.6	3.3	2.2	3.2	3.3	3.3	3.0	2.9	2.9
IN	100.0	3.3	2.4	2.9	3.5	3.1	2.7	2.6	2.5
IA	100.0	3.2	2.0	2.7	3.0	3.2	3.2	2.7	2.7
KY	100.0	3.6	2.4	3.1	3.3	3.2	3.1	3.0	2.4
LA	96.0	3.8	2.5	3.0	3.3	3.2	2.9	2.7	2.8
ME	95.7	3.7	2.3	3.0	3.5	3.0	3.2	2.4	2.8
MA	83.3	3.3	1.8	2.8	3.5	3.3	2.8	2.3	2.2
MI	92.9	3.3	2.3	2.8	3.3	3.2	3.1	2.6	2.6
MN	100.0	3.4	2.1	2.9	3.3	3.2	2.8	2.7	2.7
MS	100.0	3.5	2.2	3.4	3.4	3.1	3.4	2.5	2.5
MO	100.0	3.5	2.1	3.0	3.4	3.1	3.1	2.8	2.2
MT	100.0	3.5	1.4	2.5	3.6	2.9	2.8	2.3	2.5
NE	92.0	3.5	1.9	2.9	3.6	3.4	2.7	2.5	2.2
NV	90.9	3.3	2.1	2.8	3.5	3.6	2.5	2.4	2.0
NH	100.0	3.5	2.1	2.6	3.7	3.2	3.4	2.4	2.3
NJ	95.3	3.3	2.1	2.8	3.2	3.2	3.0	2.5	2.5
NM	100.0	3.5	1.8	2.6	3.6	3.1	2.9	2.5	2.4
NY	96.1	3.4	2.4	2.8	3.4	3.1	3.0	2.6	2.6
NC	95.8	3.8	2.4	2.9	3.5	3.3	3.0	2.8	2.7
ND	100.0	3.4	2.4	2.9	3.0	2.8	2.6	2.6	2.2
OH	90.9	3.2	2.1	2.9	3.4	3.2	3.0	2.5	2.8
OK	100.0	3.5	2.1	2.9	3.1	3.0	2.5	2.4	2.1
OR	94.6	3.5	2.1	2.9	3.4	3.1	3.1	2.5	2.5
PA	95.5	3.5	2.2	2.9	3.3	3.2	3.0	2.7	2.7
RI	100.0	3.3	2.0	2.7	3.1	2.9	2.6	2.3	2.5
SC	100.0	3.4	2.1	2.8	3.6	3.2	3.3	2.6	2.5
SD	93.8	3.4	2.2	2.3	3.6	3.0	2.9	2.6	2.6
TN	93.8	3.5	2.2	2.8	3.5	3.3	2.9	2.8	2.8
TX	97.0	3.5	2.2	2.8	3.3	3.4	3.1	2.7	2.3
UT	100.0	3.5	2.3	3.0	3.4	3.2	3.1	2.8	2.7
VT	100.0	3.3	1.9	2.5	3.3	3.4	3.5	2.6	3.0
VA	92.2	3.3	2.1	3.0	3.5	3.2	3.0	2.5	2.6
WA	95.8	3.5	2.5	3.2	3.3	3.3	3.1	2.8	2.9
WV	93.3	3.5	2.3	3.0	3.2	3.1	3.0	2.6	2.8
WY	91.7	3.8	2.4	3.1	3.7	3.2	2.9	2.2	2.7
Total	94.2	3.5	2.2	2.9	3.4	3.2	3.0	2.6	2.5

<sup>a</sup> Percentages based on respondents who provided information for this question.

<sup>b</sup> Scale of 1 to 4, with 1=not important and 4=very important.

Source: Mail survey conducted in 2004.

**Table27. Importance of Factors Regarding Expansion of Geographic Scope of Nursery, 2003**

State	Response rate <sup>a</sup>	Debt capital	Equity capital	Marketing	Personnel	Production	Transportation	Plant offering
	percent	average rating <sup>b</sup>						
AR	85.7	2.3	2.2	2.6	2.5	3.0	2.3	2.7
CA	88.9	2.4	2.4	2.8	2.7	2.8	2.7	2.6
CO	94.1	2.3	2.4	2.9	3.3	2.8	2.6	2.3
CT	87.0	2.7	2.4	2.7	3.1	2.8	2.7	2.5
DE	80.0	2.0	1.9	2.3	2.8	2.9	2.1	2.8
FL	88.2	2.5	2.5	2.7	2.7	2.9	2.6	2.6
GA	92.9	2.5	2.3	2.5	2.9	2.8	2.6	2.5
HI	92.9	2.2	2.0	3.1	2.5	3.3	2.9	2.7
ID	100.0	2.1	2.0	2.6	2.4	2.8	2.7	2.3
IL	89.8	2.4	2.4	2.5	2.8	2.7	2.3	2.5
IN	97.1	2.1	2.2	2.6	2.8	2.7	2.4	2.2
IA	91.7	2.4	2.2	2.8	2.5	2.7	2.3	2.4
KY	96.0	2.7	2.7	3.1	3.3	2.9	2.9	2.5
LA	92.0	2.6	2.5	2.7	2.9	3.1	2.7	2.6
ME	84.8	2.6	2.5	2.8	2.8	2.9	2.4	2.6
MA	83.3	2.6	2.7	2.9	2.8	2.6	2.6	2.5
MI	84.7	2.6	2.5	2.6	2.8	2.8	2.5	2.6
MN	97.4	2.8	2.7	2.9	3.1	3.2	2.4	2.6
MS	100.0	2.9	2.9	3.1	3.3	2.9	2.8	2.9
MO	94.1	2.7	2.5	2.8	2.9	2.3	2.3	2.3
MT	90.9	3.0	3.2	2.7	3.1	3.1	3.0	2.9
NE	80.0	2.2	2.3	2.6	2.8	3.1	2.5	2.5
NV	81.8	2.2	2.1	3.1	2.3	2.5	2.9	2.8
NH	100.0	2.4	2.5	2.7	3.2	2.9	2.3	2.6
NJ	84.4	2.2	2.3	2.9	2.9	2.9	2.3	2.3
NM	94.1	2.4	2.3	2.8	2.9	2.7	2.9	2.5
NY	89.3	2.6	2.6	2.7	2.9	2.8	2.4	2.4
NC	90.5	2.7	2.6	3.1	2.9	3.1	2.8	2.7
ND	84.6	2.6	2.5	2.9	2.5	2.8	2.8	2.1
OH	85.1	2.4	2.3	2.6	2.9	2.8	2.3	2.4
OK	80.0	2.5	2.6	3.4	2.8	2.9	2.8	2.9
OR	87.8	2.6	2.4	2.9	2.8	2.9	2.7	2.6
PA	85.9	2.4	2.4	2.5	2.8	2.8	2.4	2.3
RI	100.0	2.9	2.4	3.0	3.2	3.3	2.5	2.7
SC	94.1	2.8	2.6	2.8	2.7	2.5	2.5	2.5
SD	81.3	2.8	2.7	3.2	3.1	3.2	2.5	2.4
TN	88.5	2.7	2.6	3.0	3.0	3.0	2.7	2.7
TX	90.9	2.7	2.6	2.8	2.8	3.0	2.8	2.6
UT	100.0	2.6	2.5	2.7	2.8	2.7	2.6	2.4
VT	93.8	2.1	2.1	2.3	2.7	3.1	2.3	2.6
VA	88.2	2.3	2.1	2.6	2.8	2.8	2.4	2.1
WA	91.7	2.4	2.6	3.0	3.0	3.0	3.0	2.7
WV	90.0	2.1	2.0	2.6	2.9	3.1	2.3	2.3
WY	83.3	2.7	2.5	2.9	2.9	2.8	2.8	2.4
Total	88.4	2.5	2.5	2.7	2.8	2.9	2.5	2.5

<sup>a</sup> Percentages based on respondents who provided information for this question.

<sup>b</sup> Scale of 1 to 4, with 1=not important and 4=very important.

Source: Mail survey conducted in 2004.

**Table 28. Importance of Factors Impacting Nursery Business, 2003 (page 1 of 2)**

State	Response rate <sup>a</sup>	Weather uncertainty	Land	Market demand	Labor	Water supply	Debt capital
	percent	average rating <sup>b</sup>					
AR	89.3	2.6	2.2	3.4	2.5	2.6	2.2
CA	95.2	2.8	2.4	3.3	2.8	2.6	2.4
CO	94.1	2.9	2.9	3.3	2.6	3.2	2.1
CT	100.0	3.4	2.5	3.4	2.8	2.6	2.4
DE	80.0	3.2	2.7	3.5	2.8	2.9	2.2
FL	93.1	2.9	2.5	3.4	2.7	2.6	2.3
GA	100.0	3.1	2.2	3.5	2.9	2.7	2.3
HI	85.7	2.4	1.7	3.7	2.9	2.6	2.5
ID	100.0	2.8	2.1	2.9	2.1	2.0	2.1
IL	97.7	3.3	2.7	3.5	2.7	2.3	2.2
IN	91.2	3.3	2.5	3.2	2.8	2.2	2.1
IA	100.0	3.0	2.3	3.3	2.4	2.0	2.0
KY	100.0	3.3	2.4	3.4	3.2	2.6	2.6
LA	94.0	3.2	2.4	3.5	2.9	2.5	2.3
ME	97.8	3.1	2.3	3.1	2.5	2.3	2.2
MA	94.4	3.1	2.4	3.3	2.8	2.3	1.9
MI	92.9	3.1	2.5	3.3	2.4	2.2	2.3
MN	94.7	3.1	2.9	3.4	2.9	2.2	2.5
MS	89.5	3.3	2.1	3.5	2.9	2.3	2.6
MO	94.1	3.0	2.1	3.0	2.6	2.3	2.4
MT	100.0	3.0	2.1	3.4	2.8	1.8	2.5
NE	92.0	3.1	2.2	3.2	2.8	2.4	2.0
NV	90.9	2.6	2.4	3.1	2.2	2.9	2.0
NH	100.0	3.3	2.3	3.4	3.0	2.5	2.3
NJ	93.8	3.3	2.6	3.4	2.9	2.5	2.2
NM	100.0	3.0	2.4	3.0	2.5	3.4	2.6
NY	95.5	3.2	2.2	3.3	2.6	2.3	2.3
NC	97.9	3.4	2.7	3.4	3.1	2.8	2.6
ND	100.0	3.5	2.2	2.6	2.5	2.2	2.4
OH	91.7	3.2	2.5	3.2	2.8	2.3	2.3
OK	80.0	3.2	1.8	3.7	3.2	2.5	2.8
OR	93.2	2.9	2.4	3.4	2.6	2.7	2.3
PA	96.2	3.3	2.5	3.2	2.7	2.5	2.2
RI	100.0	3.3	2.8	3.3	3.2	2.5	2.8
SC	97.1	3.0	2.2	3.6	2.5	2.5	2.5
SD	87.5	3.6	2.4	3.4	2.6	2.2	2.6
TN	94.8	3.2	2.7	3.5	2.9	2.5	2.5
TX	95.5	2.9	2.2	3.4	2.7	2.8	2.5
UT	90.9	3.1	2.6	3.3	2.9	2.9	2.5
VT	93.8	3.2	3.1	2.9	2.8	2.4	2.1
VA	92.2	3.1	2.3	3.3	2.8	2.4	2.1
WA	100.0	3.0	2.5	3.3	2.5	2.5	2.7
WV	96.7	3.3	2.3	3.1	2.9	1.9	1.9
WY	91.7	3.5	2.4	3.3	2.9	2.5	2.4
Total	94.1	3.1	2.4	3.3	2.7	2.5	2.3

<sup>a</sup> Percentages based on respondents who provided information for this question.

<sup>b</sup> Scale of 1 to 4, with 1=not important and 4=very important.

Source: Mail survey conducted in 2004.

**Table 28. Importance of Factors Impacting Nursery Business, 2003 (page 2 of 2)**

State	Equity capital	Own management expertise	Competition, price undercutting	Environmental regulations	Other governmental regulations	Ability to hire competent management	Ability to hire competent hourly employees
	average rating <sup>a</sup>						
AR	2.3	2.6	2.3	2.1	2.2	1.8	2.4
CA	2.4	2.8	2.6	2.5	2.6	2.4	2.7
CO	2.3	2.4	2.6	2.1	1.9	2.7	2.8
CT	2.2	2.6	2.4	2.1	2.0	2.5	2.9
DE	2.1	2.7	2.4	2.2	2.2	2.3	2.4
FL	2.4	2.7	2.8	2.6	2.6	2.3	2.6
GA	2.3	2.8	2.7	2.5	2.4	2.4	2.5
HI	2.3	2.7	2.6	2.1	2.1	2.3	2.8
ID	1.9	2.7	2.4	1.9	1.8	2.1	2.7
IL	2.3	2.9	2.5	2.3	2.3	2.1	2.5
IN	2.3	2.7	2.7	2.4	2.5	2.3	2.7
IA	2.1	2.5	2.8	2.2	2.2	2.3	2.3
KY	2.5	3.0	2.5	2.5	2.3	2.4	2.9
LA	2.2	2.6	2.8	2.4	2.6	2.3	2.8
ME	2.2	3.0	2.6	2.3	2.3	2.0	2.3
MA	1.8	3.2	2.9	2.6	2.6	2.6	2.8
MI	2.3	2.8	2.5	2.4	2.4	2.1	2.5
MN	2.5	2.7	2.8	2.2	2.3	2.6	2.9
MS	2.7	3.0	2.9	2.8	2.6	2.9	3.4
MO	2.4	2.5	2.5	2.3	2.3	2.1	2.2
MT	2.6	2.6	2.5	2.1	2.1	2.4	2.5
NE	2.0	2.5	2.3	2.0	1.9	2.0	2.4
NV	2.0	2.7	2.7	2.2	2.2	2.4	2.7
NH	2.5	3.1	2.5	2.5	2.4	2.5	2.8
NJ	2.2	2.7	2.5	2.7	2.7	2.3	2.8
NM	2.6	2.7	2.3	1.9	2.1	2.0	2.3
NY	2.4	2.6	2.7	2.4	2.3	2.1	2.5
NC	2.6	2.8	2.5	2.8	2.9	2.8	2.8
ND	2.3	2.4	2.2	1.7	1.8	1.8	2.7
OH	2.2	2.8	2.4	2.4	2.5	2.3	2.6
OK	3.0	3.1	3.1	2.5	2.5	2.5	2.4
OR	2.3	2.8	2.6	2.4	2.4	2.2	2.4
PA	2.2	2.7	2.6	2.5	2.4	2.2	2.7
RI	2.3	3.2	2.8	2.6	2.4	2.7	2.9
SC	2.3	2.9	2.7	2.5	2.3	2.0	2.4
SD	2.4	2.5	2.4	1.8	1.8	1.8	3.0
TN	2.4	2.7	2.7	2.4	2.4	2.3	2.6
TX	2.4	2.9	2.5	2.2	2.4	2.4	2.8
UT	2.6	2.8	2.8	2.2	2.4	2.5	2.6
VT	2.2	2.1	2.5	1.8	1.9	1.9	2.9
VA	1.9	2.7	2.4	2.0	2.1	2.3	2.7
WA	2.8	3.0	2.7	2.4	2.7	1.9	2.5
WV	1.9	2.8	2.3	2.3	2.1	2.0	2.6
WY	2.3	2.9	3.0	2.5	2.2	2.6	2.9
Total	2.3	2.8	2.6	2.4	2.4	2.3	2.6

<sup>a</sup> Scale of 1 to 4, with 1=not important and 4=very important.

Source: Mail survey conducted in 2004.