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**Greenlife
Industry Australia**

ACIL ALLEN

Nursery Industry Statistics 2020–21 to 2024–25 (NY21000)

2020–21 Production Nursery Data Capture Report

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Data and insights provided in this report are based on information provided by survey respondents and subsequent assumptions made. Readers should note there is a margin for error on all data provided and the report authors cannot guarantee the accuracy of information provided or assumptions made.

Acknowledgements

NGIA, DTER and AAC would like to thank all survey respondents for providing data and information for this study. We appreciate the time and effort taken to provide a considerable amount of data and information.

Executive Summary

Background

The 2020-21 Production Nursery Data Capture Report is the first under the NY21000 Project umbrella and fifth annual nursery statistics survey funded by Hort Innovation.

The survey collects point in time and tracking data measuring production nursery sales, sentiment, employment, investment and, consistent with 2020, the impact of COVID-19 disruptions.

Results provide industry and growers with valuable information that can assist with decision making, resource prioritisation, investment evaluation and strategic planning activities. The data collected also informs the development of a business benchmarking data tool produced by ACIL Allen and distributed to survey participants.

Methodology

To ensure consistency, data for the 2020-21 survey was collected following the methodology used in past Projects (NY16004 and NY17008).

In total, 269 completed interviews were received, 167 via Computer Assisted Telephone Interviews (CATI), 57 via email and 45 through an online platform. While it was hoped 300 interviews would be completed, a delayed start, additional burden placed on production businesses due in part, to COVID-19 induced challenges obtaining staff as well as high product demand meant participation was challenging for some businesses.

It should be noted however, that 269 completed interviews provides an acceptable margin for error based on sampling error of $\pm 5.0\%$ on national results (where the total sample responded).

Consistent with past Projects, assumptions detailed fully in section 1 of this report were made to enable extrapolation of the data to represent the entire production nursery industry.

Survey results

Number and value of plants sold

Since 2015-16, production nursery sales have trended upwards and in 2020-21 an estimated 2.3 billion plants, valued at approximately \$3.6 billion were sold.

When the total amount of plants sold to other production nurseries is excluded (ensuring plant sales are not double counted), it is estimated that 1.7 billion units were sold to retail, landscape, Government, direct to consumer, revegetation and primary industry sectors at an estimated value of approximately \$2.8 billion. Year on year, this represents an increase of approximately 8% from the previous financial year and is estimated to represent more than 20% growth since 2015-16.

Sales to the retail (independent and 'big box') supply chain continue to represent the largest channel and are estimated to have increased 7% year on year to a value

of approximately \$1.46 billion in 2020-21 (representing 41% of the value all production sales).

Similarly, there is evidence the value of sales to wholesale nurseries (23% of the value of all sales), primary industry (11%) and direct to consumers (3%) have increased significantly over the past 12 months.

Sales to 'big box' retailers

Survey results suggest that sales to 'big box' retailers continue the upwards trend evident since 2017-18. In 2020-21, these sales were estimated to be worth approximately \$750 million or approximately 51% of total value of sales to the retail channel and 21% of the value of all production nursery sales.

Although small sample sizes mean that caution is required interpreting data, survey results suggest that large businesses (with turnover exceeding \$2 million) continue to be responsible for the vast majority of the value sold by production nurseries to 'big box' retailers (89%).

Turnover per hectare

Consistent with the increase in value of production nursery sales, survey results suggest that turnover per hectare has trended upwards over the past 4 years and in 2020-21 was estimated to be approximately \$470,000 (up from \$440,000 in 2019-20). Notably, the survey does not have scope to explore systems that may be responsible for this increased efficiency.

Stock shortages

In total, 53% of production businesses experienced challenges filling orders due to stock shortages. Small to medium businesses were significantly more likely to be affected and the proportion of total income estimated to be lost considerably greater than large counterparts (15% of total turnover for small compared to 3% among large businesses). Survey constraints meant reasons for this result, for example, labour shortages, were not explored.

Impact from COVID-19 disruptions

Consistent with 2019-20, COVID-19 disruptions impacted sales for approximately 6 in 10 production businesses. While the outcome remained more likely to be a positive impact on sales (42% of all respondents), 1 in 5 experienced a negative impact.

Current and future industry sentiment

Continued growth in the demand for greenlife has ensured the vast majority (88%) of respondents remain confident in the industry's future and it is notable that since 2017, the proportion *very positive* has trended upwards and is now a very high 48% of all respondents.

Similarly, 4 in 10 business are currently expanding compared to just 5% contracting. While expansion is expected to be widespread over the next 5 years, particularly among large businesses, it is notable this result is trending downwards among small and medium businesses, who are becoming more likely to anticipate a steady pattern of operation.

Business investment

Approximately two thirds of businesses invested in new technology or infrastructure in 2020-21. Respectively, these investments represent 1% and 5% of overall turnover.

Compared to 2019-20, a slightly (not statistically significant) higher proportion of businesses invested in education and training (33%, up from 27%). Notably, 2020 results suggest 24% of the workforce hold tertiary qualifications and many may not require year by year learning unless the business is undergoing a substantial systems change.

Investment continues to be more widespread among large businesses. In 2020-21, almost 9 in 10 large businesses invested in new infrastructure or technology and half doing so in education and training.

Employment

Consistent with past years, extrapolated data suggests the nursery production workforce is between 22,000 and 25,000 people and is equivalent to a FTE of approximately 20,500 (slightly higher than in 2019-20 - 19,700).

In 2020-21, on average, business turnover per FTE was \$175,000 (up slightly from \$169,000 in 2019-20), but varies significantly from \$80,000 among small to \$215,000 in large businesses.

Wages paid

Consistent with a slightly greater total workforce FTE than in 2019-20, results suggest production businesses paid \$1.2 billion dollars in wages in 2020-21 (up from \$1.13 billion) at a similar average wage to past years (approximately \$58,500).

Wage costs continue to represent approximately one third of turnover, but this varies from 49% among small businesses to 32% among large businesses.

Conclusions and recommendations:

Project processes and methodology:

- ❖ A dip in participation numbers compared to the 2019-20 collection highlights the necessity of a strong communication campaign and surveys completed via telephone encouraging participation through highlighting benefits to industry.
- ❖ To capitalise on favourable participation rates evident in survey waves prior to 2021, future surveys should commence interviewing early in October rather than late.
- ❖ As in previous years, longitudinal comparison of results remains consistent and consequently a robust library of data has been collected over the life of the surveys. The methodology has again been proven to be sound to collect this type of sensitive data.

Survey results:

- ❖ Results reflect a favourable year overall for production nurseries with increased demand for greenlife resulting in substantial sales growth, widespread profitability and the vast majority of respondents confident in the industry's future.
- ❖ 2021-22 is expected to again be a profitable year for production business and while over the next 5 years many enterprises expect continued growth, this will be more common among large businesses whereas small and medium counterparts are more likely to realise steady sales.
- ❖ There is suggestion that production businesses are generating increased turnover without increasing land area and there isn't scope within the survey to explore reasons for this result. It may be worth considering a series of in-depth interviews with large production nurseries to explore systems changes or business models driving this outcome.

Main report

1. Background and methodology

Background

In 2017, Hort Innovation commissioned the Nursery & Garden Industry Statistics Project (NY16004) that implemented a differing methodology than used previously and largely overcame the challenges collecting nursery industry data due to the industry's diversity and lack of engagement.

As a result, since NY16004, data has been collected annually and Hort Innovation's NY21000 Project will ensure timely and accurate data will be collected for the 2020-21 to 2024-25 financial years. Results will track volume and production value of the industry as well as supply chain, employment and sentiment data.

The data collected will inform industry decision making, resource prioritisation, investment evaluation, strategic planning activities and provide the industry with an interactive benchmarking data tool.

Data in this Report is the first survey wave of the NY21000 Project and captures outcomes from the 2020-21 financial year.

Data collection methodology

The 2020-21 data collection methodology remains consistent with prior Hort Innovation funded nursery statistics projects and ensures reliability of data comparison year on year is maintained.

This wave, however, the random sample of respondents was provided an additional option of completing the survey online as well as via email or telephone interview if that was their preference.

While it was hoped 300 interviews would be achieved, additional consumer demand for greenlife products, workload complying with Government regulations, challenges obtaining staff, combined with a Project commencement later in the year than previously, meant participation in the survey was more challenging than past years and 269 completed surveys were received. Positively however, this number ensures an acceptable margin of error on national results.

In 2021, the following stages were undertaken to allow appropriate monitoring of progress and to maximise participation:

Stage 1:

- A random sample of Greenlife producers were contacted by experienced members of the interview team.
- Respondent contact details were confirmed via phone and appointments made to call back and complete the survey.

Stage 2:

- To ensure respondents expressing interest in participating were aware of the data required to be extracted and DTER's management of data and confidentiality, production nurseries were emailed a confidentiality statement (Appendix 1), snapshot of the industry (from 2020 results) and full copy of the questionnaire (appendix 3).

Stage 3:

- Computer Assisted Telephone Interviews (CATI) are conducted or if preferred, completed surveys returned via email, post or completed online.

The contact database developed in NY16004 and updated by NGIA and DTER past years was fed into the CATI program set up by Market Metrics (accredited market research call centre used for the project based in Victoria). All interviewers used for the project have considerable experience working on DTER's projects in the agriculture sector and almost all worked on the previous survey. Prior to commencement, interviewers were thoroughly briefed on all aspects of the project by Daniel Watson, a senior consultant at DTER.

Initial contact, appointment setting and interviewing commenced on the 28th October 2021 and concluded on Wednesday 15th of December.

Consistent past surveys, a large proportion of respondents rescheduled appointment times, often on multiple occasions. Additionally, some respondents initially agreeing to provide information refused to do so following receipt of the list of data requirements.

In total, 269 interviews were completed, lower than in 2020 (292) and 2019 (305), but higher than in 2017 (221 achieved). As a result, the sampling margin for error (at the 95% confidence level) is $\pm 5.0\%$ on national results.

Notably, due to a late start in 2021, the interviewing period was almost 2 weeks less than in 2020.

In total, 167 interviews were completed via telephone at an average interview length of 22 minutes, 57 received via email and 45 online. Consistent with past surveys, when telephone calls to production businesses ceased, receipt of email completes also stopped, indicating phone calls to respondents are required to stimulate completion of surveys.

Key anecdotal reasons for refusing to participate included:

- Excessively busy due to increased plant demand through COVID-19 and challenges meeting Government requirements.
- Challenges obtaining staff to accommodate increased demands
- Complexity of information required/data required not captured
- Busy time of year (preference for survey to run in winter months)

Data weighting and number of Greenlife businesses

Based on past survey waves and the comprehensive number of calls made, it was possible to make assumptions on the number of businesses in each State and subsequently determine weighting figures that could be applied to the interviews achieved so that statistics provided represent the entire greenlife production

industry, not only the sub-set of organisations participating in the study (these estimates are detailed below).

It is important to note that the extrapolation of data makes the assumption that the sample for the project represents 'the universe' of greenlife production organisations.

	national	nsw/act	vic	qld	sa	wa	tas	nt
Number of greenlife businesses estimated	1,651	519	426	412	101	127	53	13
Number of interviews conducted	269	76	93	62	14	14	7	3

Confidence limits

sample base	margin for error (where 70% of respondents concur)
292	±5.0%
200	±6.0%
100	±8.7%
50	±12.5%
30	±16.3%

Handling of 'empty cells'/missing data

The data set includes a number of 'empty cells' or missing data, typically due to respondents being unaware of the number of plants sold or being unable to extract data according to requested categories and supply chain options.

To reliably weight and extrapolate data to represent the entire industry means these 'empty cells' need to be accounted for and the technique (detailed below) utilised in NY16004 and NY17008 is used again this year. Additionally, extrapolated results are informed through DTER's database of de-identified data.

NY16004 identified a considerable range in business sizes and a large variation in business data (for example selling \$1 plants through to \$1,500) therefore it was deemed inappropriate to apply an overall average to each empty cell. Consequently, where respondents were able to provide the number of plants sold or the value of plants sold, the missing category was applied data based on

information available (plant sales value to category, employee numbers, FTE, total turnover etc). For example, an organisation with 20 employees provided the total value of 'perennial, trees & shrubs' and 'bedding and potted colour' sold to retailers and landscapers but could not provide data on the number of plants sold in each category. In this scenario, averages for similar organisations (similar value sold to the category, size of organisation, same clients and products) was used to populate empty cells.

While it is acknowledged that a margin for error exists in the data provided in this report due to sampling, assumptions made and data provided by respondents, the report authors are reasonably confident it provides useful insights into the size of the greenlife production industry as well as attitudinal data. DTER acknowledges this method may be a contributing factor in discrepancies between data collected for this project and historical data collection efforts.

2. Definitions and report notes

Due to very small sample sizes in South Australia, Western Australia, Tasmania, Northern Territory and Australian Capital Territory, as well as the industry's diversity, data is presented nationally and by business size rather than by State and Territory.

While the Australian Bureau of Statistics (ABS) splits Greenlife production businesses into 3 classes (\$200,000 turnover or less; \$200,001 to \$2 million and more than \$2 million), DTER believes a 'micro' business is more appropriately defined as having turnover of \$500,000 or

less. Consequently, business sizes included in this report vary from those presented by ABS in the past.

The majority of data collected for the project is based on the 2020-21 financial year, comparisons made to 2020 data, will be based on the 2019-20 financial year for most variables.

Throughout this report, reference is made to various segments, defined in the table below:

Enterprise phase	Steady, happy	Those whose business is in status due to being at an acceptable stage
	Steady, unable	Those whose business is in status due to being unable to expand
	Expansion	Those whose business is in an expansion phase
	Winding down	Those contracting size of enterprise
business size (turnover)	Small	Turnover less than \$500,000
	Medium	Turnover between \$500,000 and \$2,000,000
	Large	Turnover greater than \$2,000,000
	Don't know (don't know t/o)	Unable to provide turnover value
Perception of industry	Positive	Those feeling very or fairly positive about the future of the nursery industry
	Negative	Those feeling very or fairly negative about the future of the nursery industry
	Neutral	Those feeling neutral or unsure about the future of the nursery industry
*	Small sample size	Sample less than n=30, caution required interpreting data

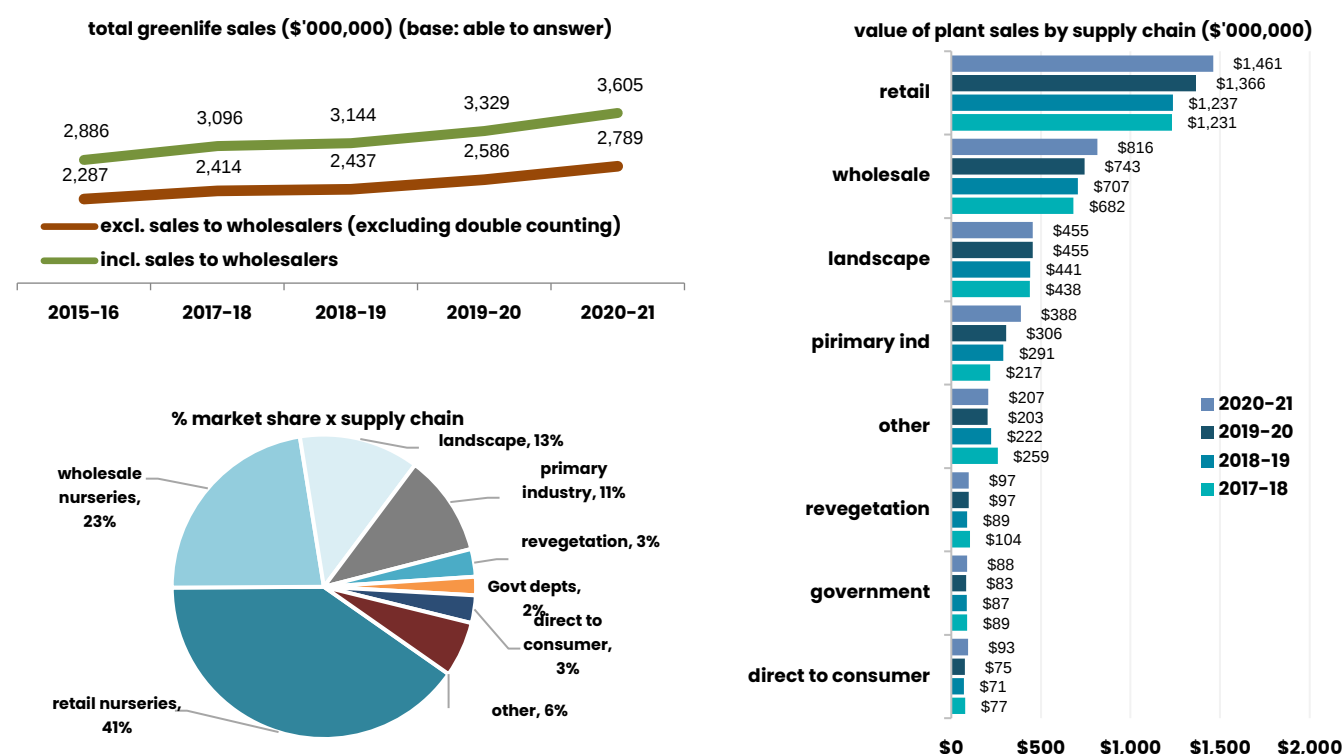
3. Number and value of plants sold

3.1 Number and value of plants sold by supply chain

Questions asked:

Q13. In the 2020-21 financial year, approximately how many plants did your business sell to ...?

Q14. And what was the total value excluding GST in the plants sold to (from Q13) in 2020-21 ...



Key findings

- Survey results suggest production nursery sales continue to trend upwards and compared to the previous financial year, grew 8% in 2020-21.
- In total, it is estimated that approximately 2.3 billion plants were sold, valued at \$3.6 billion. When sales to other production businesses are excluded (ensuring figures are not double counted), industry turnover is estimated to be approximately \$2.8 billion
- While sample sizes become smaller and the margin of error greater when results are segmented by supply chain, there is a suggestion that sales to retail, primary industry, consumer direct and other wholesale

nurseries may have seen significant growth over the past year.

- However, the industry is unlikely to have seen a uniform 8% sales increase across all segments. While some businesses are likely to have realised large turnover increases, section 4 highlights that COVID-19 disruptions have negatively impacted sales for some businesses.
- Readers should note 'other' mentions include totals for those people unable to provide breakdowns by category.

Implications

Taking into account margin for error, it can be estimated wholesale greenlife industry sales increased approximately 8% over the past year to between \$2.6 and \$2.9 billion in 2020-21.

supply chain category for plants sold (estimated)**	2020 survey (2019-2020 year)	2021 survey (2020-2021 year)
Production nurseries:		
% selling to sector	63%	61%
Total number of plants	608,562,513	633,562,619
Total value of plants	\$742,914,018	⬆️ \$816,150,970
Retail nurseries:		
% selling to sector	62%	64%
Total number of plants	366,062,302	399,313,368
Total value of plants	\$1,365,711,785	⬆️ \$1,461,591,433
Revegetation, including forestry:		
% selling to sector	21%	19%
Total number of plants	191,471,681	184,199,072
Total value of plants	\$96,697,227	\$97,075,197
Local, State and Federal Government Departments:		
% selling to sector	32%	34%
Total number of plants	25,324,309	33,834,926
Total value of plants	\$82,532,822	\$87,676,964
Landscapers, developers and builders:		
% selling to sector	49%	51%
Total number of plants	104,624,008	98,711,420
Total value of plants	\$454,720,332	\$455,156,055
Primary industry:		
% selling to sector	20%	22%
Total number of plants	794,904,753	813,616,242
Total value of plants	\$306,170,367	⬆️ \$388,121,442
Direct to consumer:		
% selling to sector	30%	32%
Total number of plants	12,453,326	17,243,519
Total value of plants	\$75,199,529	⬆️ \$92,866,965
Other (includes those unable to breakdown by category) : +		
% selling to sector	11%	8%
Total number of plants	78,620,514	143,207,045
Total value of plants	\$203,375,940	\$207,000,000
Total plants sold (including those sold to wholesalers):		
Total number of plants	2,182,023,407	2,323,688,210
Total value of plants	\$3,328,548,546	⬆️ \$3,605,639,026
Total plants sold (excluding double counting):		
Total number of plants	1,573,460,894	1,690,125,591
Total value of plants	\$2,585,634,527	⬆️ \$2,789,488,056

Due to small sample sizes by category, only national data is provided.

NOTE: Data is for the 2020-21 year and not necessarily representative of sales in every year.

⬆️ significant increase since 2019-20; ⬆️ significant decrease since 2019-20 *Significance testing not conducted, small sample size

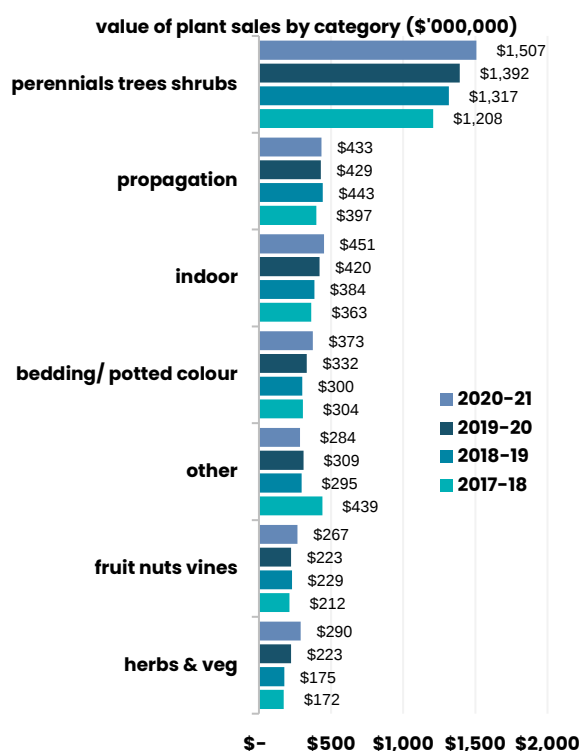
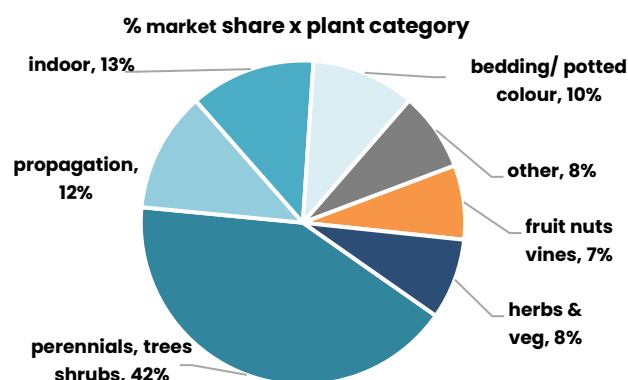
**significance testing not conducted on the number of plants sold due estimated figures provided by some respondents

3.2 Number and value of plants sold by plant category

Questions asked:

Q15. During the 2020-21 financial year, approximately how many plants did you sell in the following categories?

Q16. And what was the total value excluding GST of (from Q15) sold?



Key findings

- Consistent with past results, sales of perennials, trees and shrubs continue to represent the largest plant category.
- Notably, sales to each plant category appear to be trending upwards, but small samples mean that caution is required interpreting herb and vegetable and bedding and potted colour segments.
- In total, the top 21% of businesses are responsible for 72% of production nursery turnover.
- Allocating sales to plant categories and providing an accurate number of plants sold (due to selling trays etc.) continues to be a challenge for many businesses.
- Readers should note 'other' mentions include totals for those people unable to provide breakdowns by category.

Implications

Survey results suggest sales growth across each plant category sold by production nurseries over the past 12 months.

client category for plants sold (estimated)**	2020 survey (2019-2020 year)	2021 survey (2020-2021 year)
Propagation plants:		
% selling propagation plants	31%	32%
Total number of plants	681,146,159	661,074,851
Total value of plants	\$428,617,910	\$432,547,066
Herbs and vegetables: +		
% selling herbs and vegetables	14%	19%
Total number of plants	698,253,436	933,826,608
Total value of plants	\$222,952,534	\$290,407,382
Fruit trees, nut trees, vines:		
% selling fruit trees, nut trees, vines	23%	25%
Total number of plants	27,190,137	29,024,440
Total value of plants	\$222,923,522	⬆️ \$267,057,744
Bedding and potted colour: +		
% selling bedding, potted colour	16%	19%
Total number of plants	163,694,986	185,624,807
Total value of plants	\$331,790,883	\$373,130,869
Indoor plants:		
% selling indoor plants	26%	27%
Total number of plants	78,844,705	87,869,526
Total value of plants	\$420,482,957	\$451,327,609
Perennials, trees and shrubs:		
% selling perennials, trees, shrubs	62%	62%
Total number of plants	322,653,364	326,291,640
Total value of plants	\$1,392,774,709	⬆️ \$1,507,396,442
Other (includes those unable to breakdown by category): +		
% selling other	11%	12%
Total number of plants	210,240,619	99,976,337
Total value of plants	\$309,006,030	\$283,771,913
Total plants sold (including those sold to wholesalers):		
Total number of plants	2,182,023,407	\$2,323,688,210
Total value of plants	\$3,328,548,546	⬆️ \$3,605,639,026
Total plants sold (excluding double counting):		
Total number of plants	1,573,460,894	1,690,125,591
Total value of plants	\$2,585,634,527	⬆️ \$2,789,488,056

Due to small sample sizes by category, only national data is provided.

⬆️ significant increase since 2019-20; ⬆️ significant decrease since 2019-20

+Significance testing not conducted, small sample size

NOTE: Data is for the 2020-21 year and not necessarily representative of sales in every year

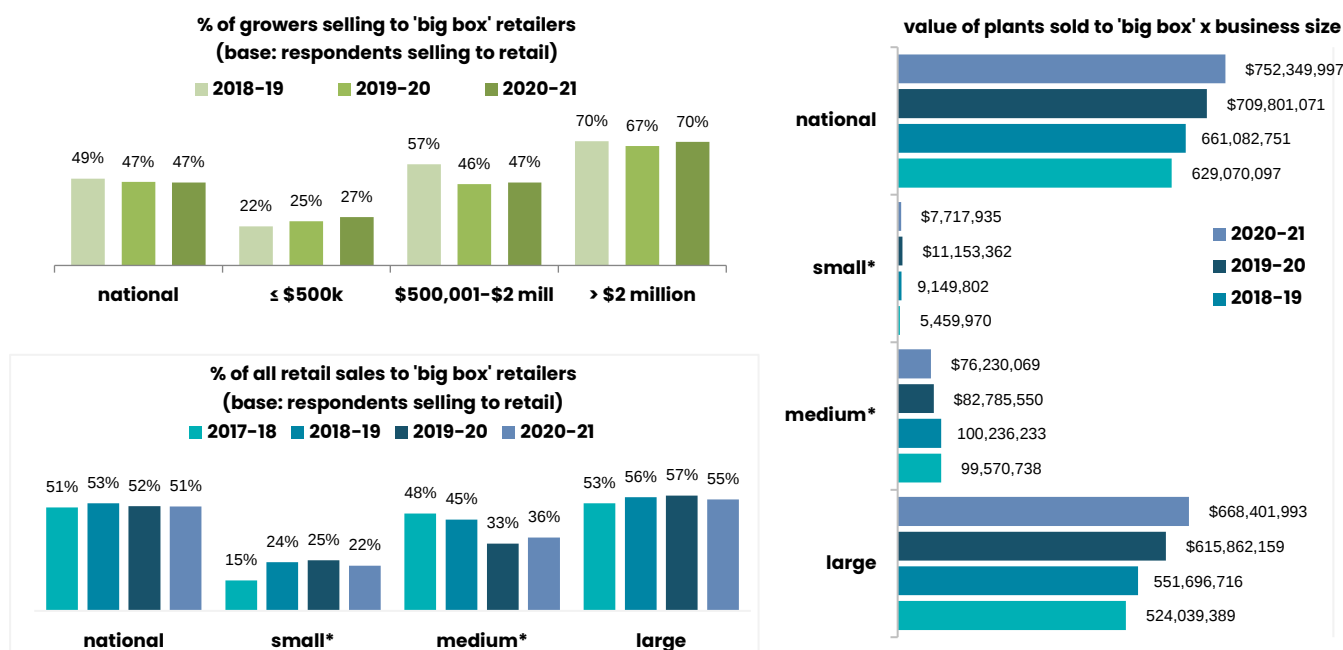
**significance testing not conducted on the number of plants sold due estimated figures provided by some respondents

3.3 Sales to 'big box' retailers

Questions asked:

Q17. In 2020-21, did you sell plants to 'big box' retailers such as Bunnings, Mitre 10, Big W or other large retailers?

Q18. What percentage of your sales to retail nurseries went to these 'big box' retailers?



Key findings

- Consistent with previous results, among respondents selling to the retail channel, approximately half (47%) sold to 'big box' retailers in 2020-21.
- In total, these sales are estimated to be valued at approximately \$752 million in 2020-21, up from \$710 million in the prior financial year.
- Notably, 'big box' sales continue to represent a similar proportion of the total value sold by production nurseries into the retail supply chain.
- Large businesses (turning over greater than \$2 million), continue to represent the bulk of sales to 'big box' retailers (88%, was 87% in 2019-20).

Implications

Sales to the 'big box' sector appear to be increasing at a similar rate as the overall retail channel.

plants sold to 'big box' retailers 2020-21 (estimated)	% mentioning (base: all respondents selling to retail/able to answer)				
	turnover				
	national	≤ \$500k*	\$500,001 to \$2 million*	> \$2 million	don't know t/o*
% selling to 'big box' retailers	47%	27%	47%	70%	-
% of retail sales to 'big box' retailers	51%	22%	36%	55%	-
Total value of plants sold	\$752,349,997	\$7,717,935	\$76,230,069	\$668,401,993	-

NOTE: Data is for the 2020-21 year and not necessarily representative of sales in every year.

*Caution, sub sample smaller than N=30

3.4 Number and value of plants purchased for immediate resale

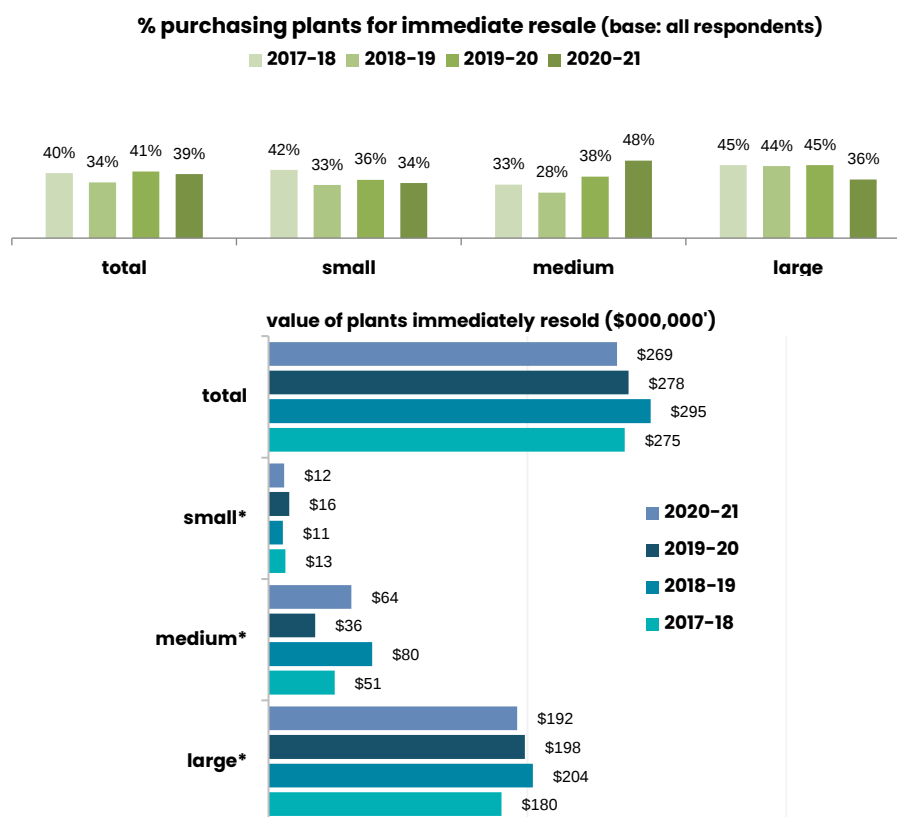
Questions asked:

Q7. During the 2020-21 financial year, did you purchase plants from other greenlife producers or nurseries for immediate resale?

Q9. If yes: What was the total value of the plants purchased from other Greenlife producers or nurseries?

Q10. How many plants in total did you purchase?

Q11. What was the total value of these plants when sold?



Key findings

- Consistent with past years, approximately 4 in 10 (39%, was 41% in 2019-20) production businesses purchased plants in 2020-21 to immediately on sell.
- While not quite statistically significant, compared to past survey waves, businesses with turnover exceeding \$2 million were slightly less likely to purchase plants to be immediately resold in 2020-21.
- Nationally, it is estimated that approximately 65 million plants were purchased and on average, sold at a margin of 87% (up from 74% in 2019-20) for a value of approximately \$270 million.
- Consistent with past waves, large businesses represent the bulk of plants purchased and immediately resold.

Implications

Results suggest that despite some stock shortages, a similar proportion of production nurseries to past years purchased plants to be immediately resold.

plants purchased for immediate resale in 2020-21 (estimated)	% mentioning (base: respondents able to provide data)				
	national	≤ \$500k*	\$500k to \$2 mil (medium)*	> \$2 million (large)*	don't know t/o*
% purchasing plants for immediate resale	39%	34%	48%	36%	43%
Total number of plants purchased**	64,697,224	3,739,862	8,810,985	52,105,821	40,556
Total value of plants when purchased	\$143,918,797	\$7,911,232	\$34,955,261	\$100,906,303	\$146,000
Total value of plants when sold	\$269,226,254	\$12,162,717	\$64,342,144	\$192,490,867	\$230,526
Average % mark-up	87%	45%	84%	91%	58%

*Caution, sub sample smaller than N=30.

**significance testing not conducted on the number of plants sold due estimated figures provided by some respondents

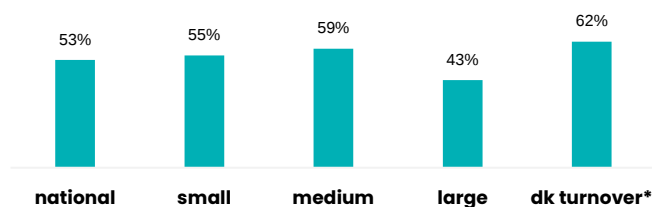
3.5 Stock shortages

Questions asked:

Q11. During the 2020-21 financial year, did stock shortages affect your ability to fill customer orders?

Q12. What was the total value of sales lost due to the inability to fill these orders? If you don't know an exact amount, please provide your best estimate

**% of businesses impacted by stock shortages
(base: all respondents)**



Key findings

- In total, 53% of production businesses experienced challenges filling orders due to stock shortages.
- Small (55%) and medium (59%) businesses were significantly more likely to be impacted than large (43%) counterparts.
- Nationally, it is estimated that 5% of total turnover may have been lost due to the inability to fill orders.
- However, this varies significantly from 15% of small business turnover to a much lower 3% among large businesses.

Implications

Based on respondent estimations, extrapolated data suggests that approximately 5% of total turnover may have been lost due to stock shortages.

2020-21 stock shortages (estimated)	national	% mentioning turnover			
		≤ \$500k*	\$500,001 to \$2 million	> \$2 million*	don't know turnover*
Stock shortage affected ability to fill orders (base: all respondents)	53%	55%	59%	43%	62%
Average estimated value of sales lost (base: those affected by stock shortages)	\$186,850	\$76,226	\$134,491	\$424,500	\$303,743
Estimated % of total turnover lost	5%	15%	8%	3%	-

*Caution, sub sample smaller than N=30

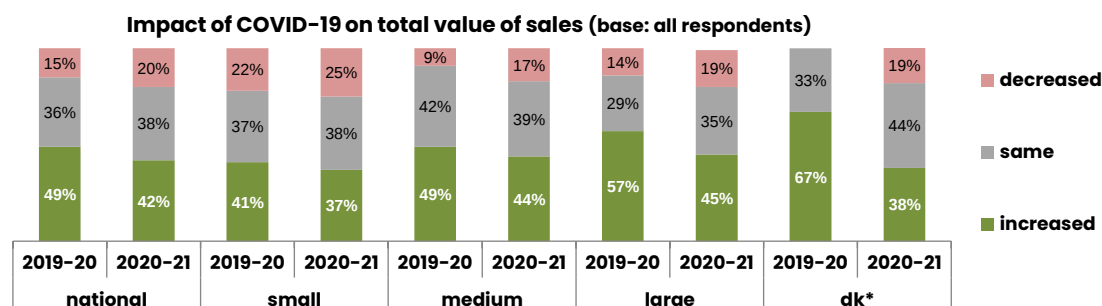
4. Estimated impact of COVID-19 disruptions/restrictions on sales

Question asked:

Q19. For the 2020-21 financial year, did COVID-19 disruptions/restrictions have any impact on the total value of your Greenlife sales?

Q20. And as a result of COVID-19 disruptions/restrictions, did the total value of your Greenlife sales in 2020-21 ...?

Q21. In your best estimate, what proportion did your total Greenlife sales increase/decrease in 2020-21 as a result of COVID-19 disruptions/restrictions?



Key findings

- In line with 2019-20 results, COVID-19 disruptions impacted the value of sales for 62% of all production businesses in 2020-21 (64% in 2019-20).
- While 42% of all respondents experienced an increase in sales (down slightly compared to 2019-20 – 49%), 1 in 5 (up slightly from 2019-20 – 15%) experienced a decrease.
- Among businesses experiencing a positive impact, on average, sales are estimated to have increased slightly less than in 2019-20 (20%, down from 26%).
- Conversely, where COVID-19 negatively impacted sales, on average, sales are estimated to have decreased 27% (similar to 2019-20 – 24%).

Implications

Overall, COVID-19 disruptions appear to have had a positive impact on production nurseries sales again in 2020-21.

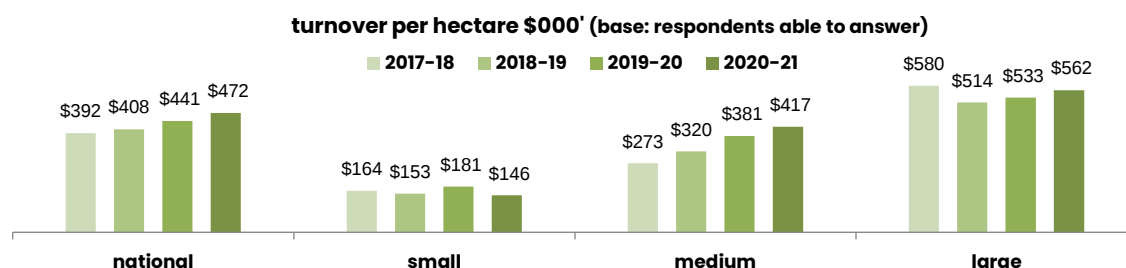
COVID-19 impact	% mentioning (base: all respondents able to answer)				
		turnover			
	national	≤ \$500k	\$500,001-\$2 mil	> \$2 million	don't know t/o*
Impacted by COVID-19 disruptions (base: all)	62%	62%	61%	65%	56%
Sales increased as a result of COVID-19	42%	37%	44%	45%	38%
Average % sales increased (base: sales increased as a result of COVID-19)	20%	24%	22%	16%	20%
Sales decreased as a result of COVID-19	20%	25%	17%	19%	19%
Average % sales decrease (base: sales decreased as a result of COVID-19)	27%	35%*	24%*	13%*	57%*

*Caution sub sample smaller than N=30.

5. Turnover per hectare and overall production area

Question asked:

Q6. What is the total farm area in each State used for nursery production – and I would like you to give me outdoor area first and then undercover including greenhouses, cold frames, cloth houses and lath houses?



Key findings

- Nationally, survey results suggest that on average, turnover per hectare continues to trend upwards. However, this result is reflected across medium and large enterprises, but not small counterparts.
- Nationally, compared to 2019-20, the total turnover generated per hectare has increased significantly.
- Turnover per hectare varies from approximately \$680,000 among the 'top' 21% of businesses (by turnover) to \$265,000 among those not in the 'top' segment.
- Since 2017-18, there has been no real change in the proportion of production businesses with indoor area (84%) and in total the industry operates on an estimated 1,300 hectares of indoor and 6,400 outdoor area.

Implications

Results suggest that over the past 4 years, medium to large production businesses have generated a greater amount of turnover without significantly increasing the amount of land used. Exploring reasons for this result is outside the scope of the survey, but may be worthwhile investigating via a series of in-depth interviews with large businesses.

production area (hectares) (estimated)	% mentioning (base: respondents able to provide data)				
	turnover				
	national	≤ \$500k	\$500,001 to \$2 million	> \$2 million	don't know t/o*
Estimated turnover per hectare (outdoor + indoor)	⬆️ \$472,323	⬇️ \$146,416	\$417,288	\$562,189	-
Outdoor area (approximate)					
Average ha per farm	4.0	1.1	3.5	8.0	2.1
Median ha per farm	1.2	0.5	1.2	3.6	1.8
Estimated total outdoor area (ha)	6,369	857	1,203	4,220	90
Indoor area (approximate)					
% of farms with indoor area	84%	82%	78%	91%	87%
Average ha per farm with indoor area	0.8	0.2	0.6	1.7	0.4
Median ha per farm with indoor area	0.3	0.1	0.2	1.2	0.2
Estimated total indoor area (ha)	1,265	121	329	802	13

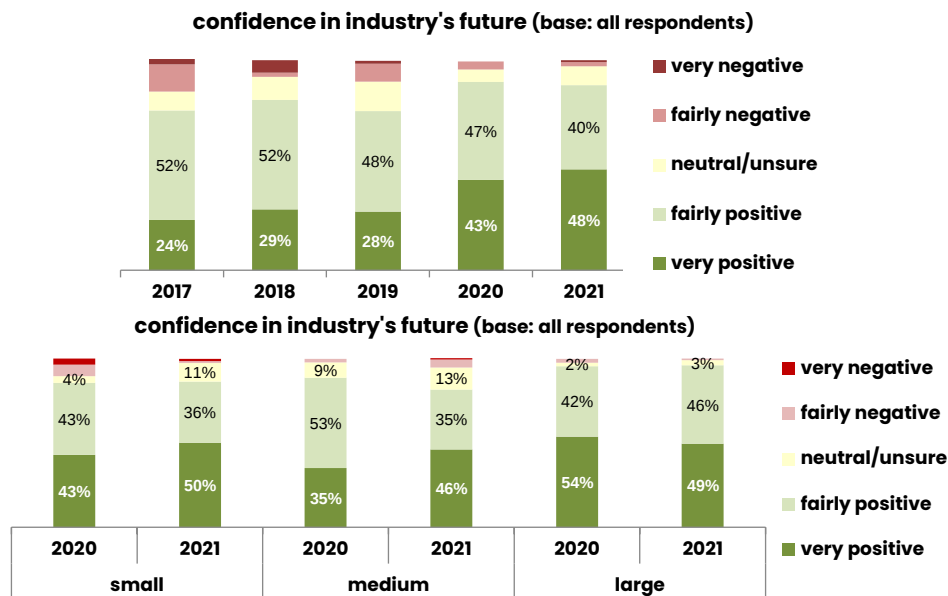
⬆️ significant increase since 2020; ⬇️ significant decrease since 2020 *Caution sub sample smaller than N=30

6. Industry confidence

Questions asked:

Q27. Overall, how do you feel about the future of the nursery and garden industry? Would you say you feel (read out)

Q28. Why do you say that?



Key findings

- The proportion of respondents *fairly* to *very* positive towards the industry's future remains similar to 12 months ago (88%, was 90% in 2020), but the proportion *very* positive continues trending upwards (48%, up from 43%).
- While product demand remains the key driver of positivity, it is notable that increased demand due to COVID-19 disruptions is significantly less likely to be mentioned than 12 months ago.
- Without prompting, approximately 1 in 10 respondents mention positivity is driven by demand resulting from environmental benefits (carbon sequestration etc.)
- Only 3% of respondents perceive the industry's future negatively, 1 point lower than in 2020 and the lowest since the survey's inception.
- Negativity is mainly due to concerns with demand, mostly based on concerns of an economic downturn.

Implications

Several years of growth has resulted in very widespread confidence in the industry's future.

confidence	% mentioning (base: all respondents)				
	national (n=269)	turnover			don't know t/o* (n=11)
		≤ \$500k (n=90)	\$500,001 to \$2 mil (n=85)	> \$2 million (n=83)	
Very positive	48%	50%	46%	49%	32%
Fairly positive	40%	36%	35%	46%	68%
Neutral	8%	9%	12%	3%	0%
Fairly negative	2%	1%	5%	1%	0%
Very negative	1%	1%	1%	0%	0%
Can't say	1%	3%	1%	0%	0%
Total: positive	88%	86%	82%	96%	100%
Total: negative	3%	2%	6%	1%	0%

reasons for level of confidence (main mentions)	% mentioning (base: all respondents)				
	national (n=269)	turnover			don't know t/o* (n=11)
		≤ \$500k (n=90)	\$500,001 to \$2 mil (n=85)	> \$2 million (n=83)	
Positive mentions:					
Total: Demand for product	↑ 66%	↓ 61%	70%	↓ 69%	50%
Product demand (general)	37%	40%	34%	40%	15%
COVID driving demand/focus on gardening	↓ 19%	↓ 13%	27%	↓ 17%	19%
Environmental aspects creating demand - carbon sequestration, urban greening, heat mitigation etc.	12%	10%	15%	10%	16%
Strong sales/positive industry	8%	6%	7%	13%	0%
Good business management/structure	4%	5%	4%	4%	0%
Negative mentions:					
Total: Decreased demand for product	5%	4%	6%	6%	0%
Economic downturn impact on sales	3%	2%	6%	3%	0%
Concerns post covid with decreased demand	1%	1%	0%	2%	9%
Specific negative mentions re supplying Bunnings	4%	4%	5%	2%	0%
Input cost concerns	2%	2%	1%	3%	0%

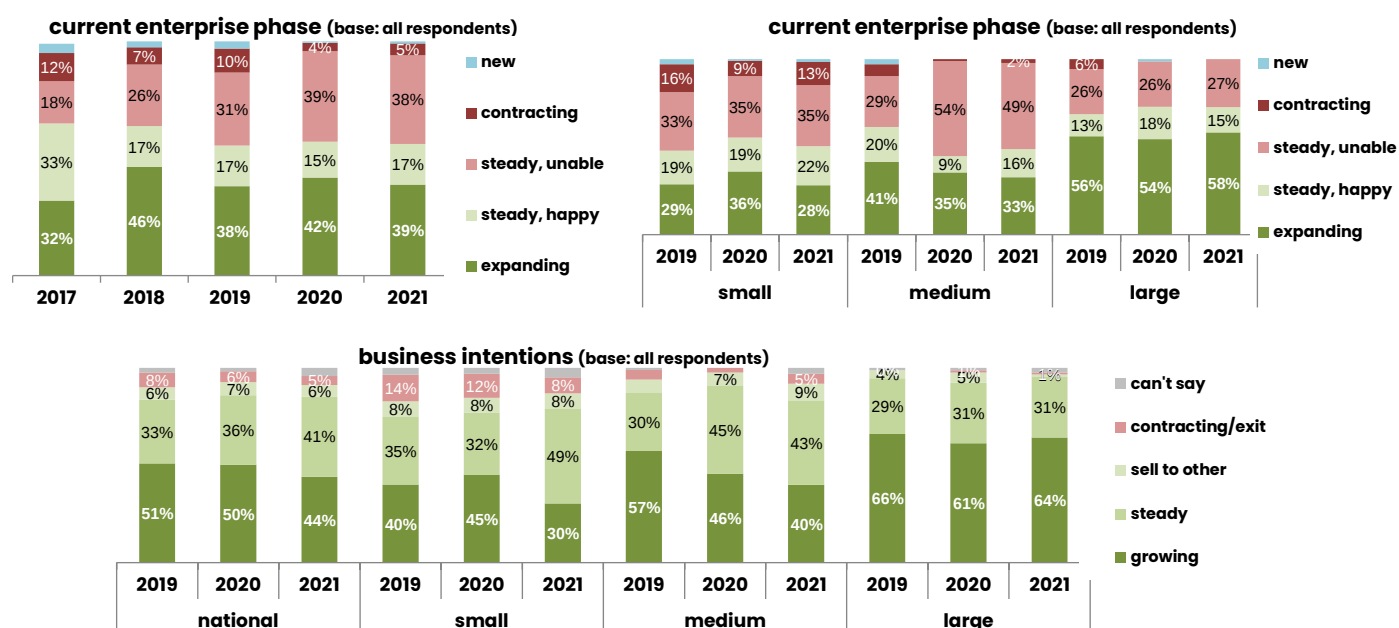
↑ significant increase since 2020; ↓ significant decrease since 2020 *Caution sub sample smaller than N=30.

7. Current business phase and future intentions

Questions asked:

Q25. Which of the following best describes your nursery business over the past few years?

Q26. At this point in time, what is the intention for the business over the next 5 years?



Key findings

- The proportion of businesses currently in an expansion, steady and winding down phase has not changed significantly over the past 12 months.
- Nationally, 39% of production businesses are currently expanding, but this varies significantly from 58% among large businesses to 28% of small enterprises.
- While over the next 5 years, a large proportion of production nurseries expect to grow their business (44%), this result appears to be trending downwards among small and medium business (no significant change among large).
- Notably, the proportion of businesses expecting to remain in a steady phase over the next 5 years has trended upwards since 2018 (now 41%).

Implications

While expansion is expected to remain widespread over the next 5 years, more small and medium sized businesses may be realising their short term growth potential and operate in a steady phase.

current business stage	% mentioning (base: all respondents)				
	national (n=269)	turnover			don't know t/o* (n=11)
		≤ \$500k (n=90)	\$500,001 to \$2 mil (n=85)	> \$2 million (n=83)	
Expanding	39%	28%	33%	58%	37%
Steady, where want it to be	17%	22%	16%	15%	9%
Steady, unable to expand	38%	35%	49%	27%	47%
Contracting/winding down	5%	13%	2%	0%	0%
New business	1%	2%	0%	0%	6%

future intentions for business	% mentioning (base: all respondents)				
	national (n=269)	turnover			don't know t/o* (n=11)
		≤ \$500k (n=90)	\$500,001 to \$2 mil (n=85)	> \$2 million (n=83)	
Growing business	44%	↓ 30%	40%	64%	46%
Remaining steady	41%	↑ 49%	43%	31%	35%
Contracting/winding down	2%	3%	3%	1%	0%
Sell as business to other person/company	6%	8%	9%	1%	0%
Sell land to developer	1%	1%	1%	0%	0%
Close business	2%	4%	1%	0%	0%
Can't say	4%	5%	3%	2%	19%

↑ significant increase since 2019-20; ↓ significant decrease since 2019-20

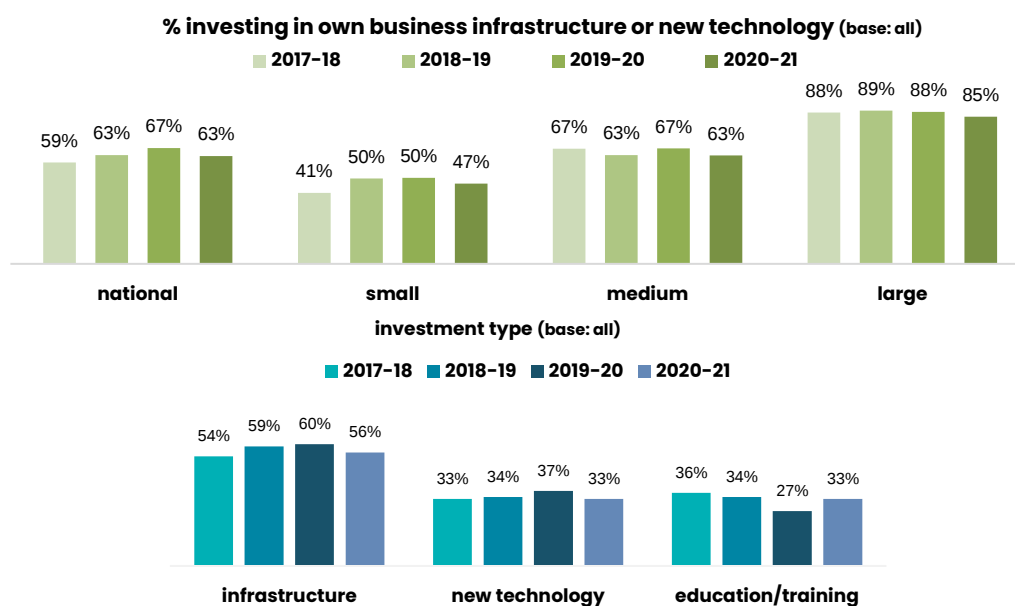
*Caution sub sample smaller than N=30.

8. Business investment

Question asked:

Q32. During the 2020-21 financial year, did you invest in either infrastructure or new technology or training and education for the business?

Q33. If yes: Approximately how much did you invest in infrastructure? Q34. If yes: Approximately how much did you invest in new technology?



Key findings

- There has been a slight (not statistically significant) dip in the total proportion of respondents investing in new infrastructure or technology (63%, was 67% in 2019-20).
- However, compared to 12 months ago the proportion of businesses investing in education and training has increased 6 points to 33%.
- Consistent with past results, businesses with turnover exceeding \$2 million are significantly more likely than smaller counterparts to invest in new infrastructure and/or technology.
- On average, respondents invested 5% of their total turnover to new infrastructure and 1% to new technology.

Implications

Spending on new infrastructure and technology is widespread among businesses with turnover exceeding \$2 million.

While spending on education and training remains significantly lower than new infrastructure, it is notable that 2020 survey results suggests 24% of the workforce hold tertiary qualification and many may not require year by year learning unless the business is undergoing a substantial systems change.

business investment	% mentioning (base: all respondents able to answer)				
	turnover				
	national	≤ \$500k *	\$500,001-\$2 mil *	> \$2 million	don't know t/o *
% making business investment in infrastructure or new technology	63%	47%	63%	85%	31%
% investing in infrastructure	56%	40%	54%	83%	31%
Average amount invested in infrastructure (base: those investing)	⬆️ \$193,293	\$60,100	\$101,954	⬆️ \$327,653	\$355,000
Total invested in infrastructure (extrapolated)	⬆️ \$170,392,542	\$12,938,185	\$27,648,173	⬆️ \$125,088,120	\$4,718,065
% investing in new technology	33%	17%	30%	55%	18%
Average amount invested in new technology	\$70,067	\$27,552	\$37,125	\$99,506	\$76,000
Total invested in new technology (extrapolated)	\$34,580,535	\$2,121,055	\$5,164,518	\$26,284,897	\$1,010,065
% investing in education and training	33%	15%	42%	46%	25%

⬆️ significant increase since 2019-20; ⬇️ significant decrease since 2019-20

*Caution sub sample smaller than N=30.

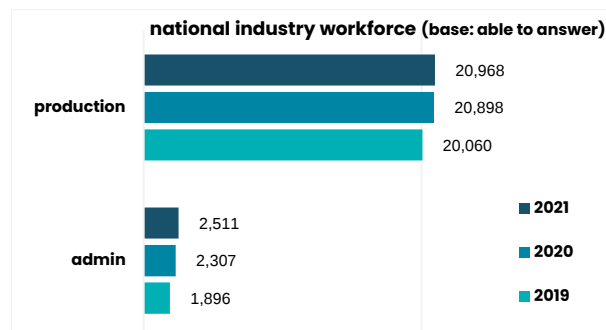
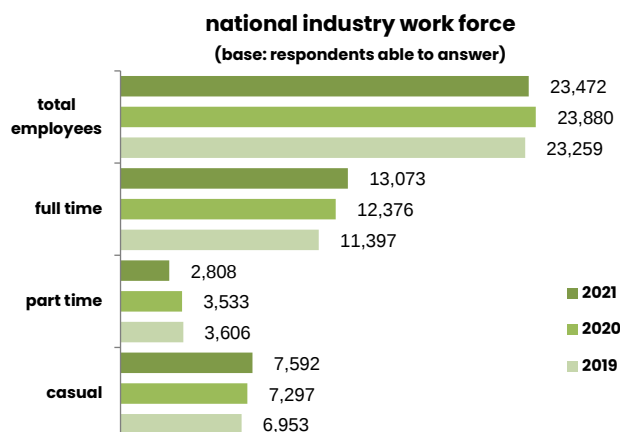
9. Industry workforce

9.1 Number of people employed and roles

Questions asked:

Q3. How many people including yourself are employed in the business in each of the States it operates in for the following categories?

Q4. And what would be the full time equivalent for each of the following in the States you operate in?



Key findings

- Since 2019, there has been no significant variation in the total number of production nursery workforce, suggesting (when margin for error is considered) there are between 22,000 and 25,000 people working in production nurseries, including approximately 13,000 full time.
- In total, this represents an estimated full time equivalent (FTE) of approximately 20,500, up slightly from 2020 (19,700).
- On average, turnover per FTE is \$175,000 (up slightly compared to 2019-20 - \$169,000), but this varies significantly by farm size (\$80,000 among small to \$215,000 among large businesses).

Implications

Extrapolated survey results estimate the production nursery workforce to be between 22,000 and 25,000 staff.

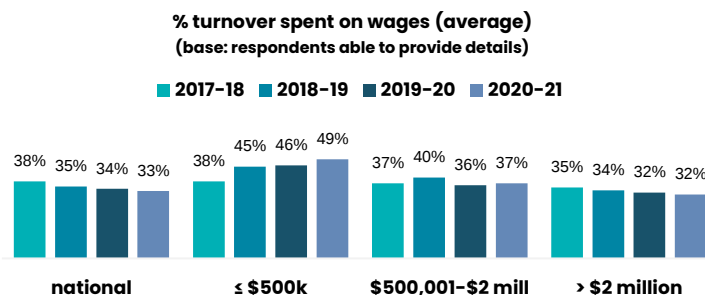
total people employed by production greenlife nurseries (estimated)	% mentioning (base: all respondents able to answer)				
	national (n=269)	≤ \$500k (n=90)	\$500,001 to \$2 mil (n=85)	> \$2 million (n=83)	don't know t/o* (n=11)
Total nursery production	20,961	↓ 2,192	5,687	12,322	760
Total admin	2,511	↓ 298	528	↑ 1,560	125
Total people employed	23,472	↓ 2,490	6,215	13,882	885
Full time equivalent	20,541	↓ 1,791	4,419	13,146	1,185
Turnover per FTE	\$175,537	\$79,938	\$144,670	\$214,766	na

↑ significant increase since 2020; ↓ significant decrease since 2020 *Caution, sub sample smaller than N=30

9.2 Wages paid

Question asked:

Q5. What was the total cost of wages for the business in the 2020-21 financial year, including your own?



Key findings

- Extrapolated survey results suggest growth over the past 3 years in the value of wages paid by production businesses (\$1.2 billion, up from \$1.13 billion in 2019-20 and \$1.11 billion in 2018-19).
- Wages in 2020-21 represented a similar proportion of total turnover to the previous financial year (33%, was 34% in 2019-20), but there is a suggestion this proportion is trending downwards, particularly among large businesses. Notably, the proportion of turnover spent on wages remains greater among small businesses than large counterparts.
- The average wage remains at approximately \$58,500.
- It should be noted the figures represented in this section include wages paid to business owners and variation in profitability is likely to result in the fluctuation seen in businesses turning over less than \$2 million.

Implications

Wages paid by production nurseries appear to have increased slightly in correlation with a greater workforce FTE than in 2019-20.

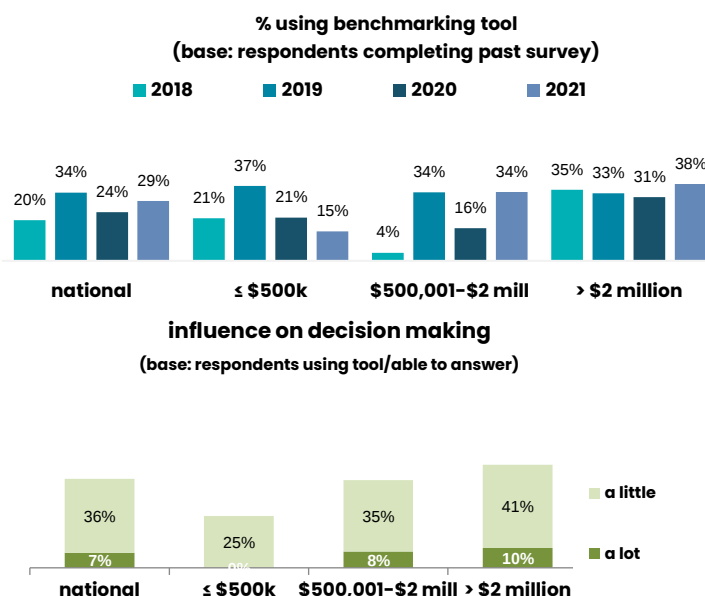
cost of wages in 2020-21 (estimated)	% mentioning (base: all respondents able to answer) turnover				
	national	≤ \$500k	\$500,001-\$2 mill	> \$2 million	don't know t/o*
Approximate total cost of wages	\$1,202,400,119	↓ \$70,115,667	\$236,904,442	\$891,156,010	\$4,224,000
Average wage based on FTE (including owners)	\$58,538	\$39,153	\$53,612	\$67,792	\$3,563

↑ significant increase since 2019-20; ↓ significant decrease since 2019-20 *Caution, sub sample smaller than N=30.

10. Benchmarking tool usage

Questions asked:

Q35. Have you or someone within your business used the excel data benchmarking tool that is sent to those completing the survey or is available on request through Hort Innovation or Greenlife Industry Australia?



Key findings

- Among those participating in last year's survey, approximately 3 in 10 (29%) have used the benchmarking tool.
- Notably, usage varies significantly from 38% of large businesses to a much lower 15% of small counterparts.
- In total, 43% of those using the tool say that it has impacted business decision making either *a lot* (7%) or *a little* (36%).
- While small sample sizes means that data should be viewed with caution it is notable half of those turning over greater than \$2 million say that the tool has impacted their decision making.

Implications

The benchmarking tool remains an important promotion factor for survey participation and encouragingly appears to be influencing business decisions among a reasonable proportion of medium to large businesses. However, scope remains to encourage adoption among small production nurseries.

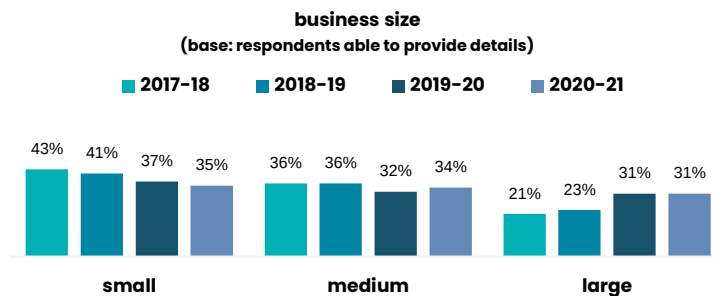
benchmarking tool usage	% mentioning (base: respondents participating in 2020 survey)				
	turnover				
	national (n=143)	≤ \$500k (n=39)	\$500,001-\$2 mill (n=43)	> \$2 million (n=59)	don't know t/o (n=2)*
Used benchmarking tool	29%	15%	34%	38%	0%
Have not used tool	58%	68%	56%	52%	51%
Have not received the data tool	4%	3%	5%	3%	0%
Unsure if received/used	9%	15%	5%	6%	49%

*Caution sub sample smaller than N=30.

impact of benchmarking tool usage	% mentioning (base: respondents using tool/able to answer)				
	turnover				
	national (n=42)	≤ \$500k (n=7)*	\$500,001-\$2 mill (n=14)*	> \$2 million (n=21)*	don't know t/o (n=0)*
Total: tool influenced decision making	43%	25%	43%	50%	43%
A lot of influence	7%	0%	8%	10%	7%
A little influence	36%	25%	35%	41%	36%
No influence	57%	75%	57%	50%	57%

*Caution sub sample smaller than N=30.

11. Organisation size (based on survey sample)



Key findings

- Since 2017-18, the proportion of businesses turning over \$500,000 or less has trended downwards, but has not changed significantly over the past 12 months.
- Consistent with past survey waves, the survey sample provides a spread of businesses sizes.

Implications

While the number of small businesses participating in the survey continues to trend downwards, there is no significant variation to the 2020 wave and the decrease in 2021 may be due, in part, to businesses creeping into the next turnover bracket.

business turnover	% mentioning (base: respondents able to provide data)	
	2020 survey (2019-2020 year)	2021 survey (2020-2021 year)
Less than \$500,000	37%	35%
\$500,001 to \$1,000,000	18%	16%
\$1,000,001 to \$1,500,000	8%	10%
\$1,500,001 to \$2,000,000	5%	8%
\$2,000,001 to \$2,500,000	7%	7%
\$2,500,001 to \$3,000,000	4%	4%
\$3,000,001 to \$3,500,000	3%	3%
\$3,500,001 to \$4,000,000	2%	2%
\$4,000,001 to \$4,500,000	2%	1%
\$4,500,001 to \$5,000,000	2%	1%
\$5,000,000 to \$10,000,000	8%	8%
\$10 million+	5%	4%

▲ significant increase since 2019-20; ▼ significant decrease since 2019-20

12. Sample demographics

demographic metric	% of sample (base: all respondents)				
		turnover			
	national (n=269)	≤ \$500k (n=90)	\$500,001 to \$2 mil (n=85)	> \$2 million (n=83)	don't know t/o* (n=11)
Age:					
18 to 39 years	9%	7%	4%	15%	20%
40 to 59 years	52%	46%	57%	55%	38%
60 and older	39%	47%	39%	30%	42%
Average age	56	58	57	52	54
Average years business operated	31	26	30	39	32
Gender:					
Male	68%	63%	68%	73%	81%
Female	32%	37%	32%	27%	19%
Respondent role:					
Owner or joint owner of the business	74%	79%	80%	63%	54%
Manager	21%	17%	19%	25%	37%
Admin/Accounts	3%	2%	1%	7%	0%
Completed 2020 survey	53%	45%	50%	72%	19%

⬆ significant increase since 2020; ⬇ significant decrease since 2020 *Caution, sub sample smaller than N=30.

Appendix 1: Confidentiality statement

28 October 2021

Nursery and Garden Industry Data & Statistics Collection

Confidentiality Statement

Thank you for your interest in providing data for the Hort Innovation project NY21000 – Nursery Industry Research and Statistics.

This project is a strategic levy investment that is part of the Hort Innovation Nursery Fund and follows the 2018, 2019 and 2020 waves that captured figures and trends on the value of greenlife production and will collect information for the 2020-21 financial year.

The aim of this project is to deliver accurate and timely industry statistics to support strategy development, decision making, advocacy and investment decisions.

Data for the project will be collected and stored securely by Market Metrics Data Collection, an independent, fully accredited data collection company based in Frankston, Victoria. Their web address is <http://www.marketmetrics.com.au> should you wish to read about their services. Data and information collected will only be used for the purposes of this specific project.

In accordance with Australia's strict Privacy Principles, full confidentiality is assured and once information processing has been completed, any identifying data such as your name, company and contact details (including address and postcode) will be removed from your responses to the survey. While interviewing is taking place, data held by Market Metrics will remain identifiable in case there is an anomaly in the data that requires a call back and clarification. Once Market Metrics has completed this process, de-identification will occur.

On completion of all interviewing, Down To Earth Research (DTER) will be provided with a de-identified data set so data can be aggregated and analysed. DTER will then provide an overall industry report to Hort Innovation. No one from the nursery and garden industry, Hort Innovation, industry organisations and associations, government departments, etc. will know who participated in the study nor the information and data they provided.

Should you have any concerns whatsoever, please contact Daniel Watson from DTER (daniel@dter.com.au or 0409 775 553) or Adam Briggs from Hort Innovation (Adam.Briggs@horticulture.com.au or 02 8295 2335).

Thank you again for your assistance. The data collected for the study will assist Hort Innovation and Greenlife Industry Australia to have more meaningful discussions with government organisations in the future. Additionally, survey data is used to provide a tool that your company will be able to use for benchmarking purposes and to better understand the size and nature of the industry.

Kind regards



Dan Watson
Research Director
Down To Earth Research

Appendix 2: CATI questionnaire

Q1. Firstly, I need to clarify how many sites your nursery business operates from _____ sites

Q2. What states and territories are the sites located in?

If only 1 site OR more than 1 site, but in the same state, ask:

Q3. How many people including yourself are employed in the business in the following roles?

If more than 1 site in different States, ask:

Q3. How many people including yourself are employed in the business in each of the States it operates in for the following categories?

	NSW	VIC	QLD	SA	WA	TAS	NT	ACT
Full time nursery production duties such as plant handling, sales and/or despatch etc.								
Part time nursery production duties								
Casual nursery production duties								
Full time business administration								
Part time business administration								
Casual business administration								
Other (specify)								

Q4. And what would be the full time equivalent (so 37.5 hours per week, including business owners) for each of the following in the States you operate in? *read out*

	NSW	VIC	QLD	SA	WA	TAS	NT	ACT
Nursery production staff								
Business administration staff								
Other								

Q5. (By state if operate in more than one state), what was the total cost of wages (inclusive of superannuation) for the business in the 2020-21 year, including your own?

	NSW	VIC	QLD	SA	WA	TAS	NT	ACT
Total wages								

If only 1 site OR more than 1 site, but in the same state, ask:

Q6. What is the total area of the farm used for nursery production – and I would like you to give me outdoor area first and then undercover including greenhouses, cold frames, cloth houses and lath houses?

If more than 1 site in different states, ask:

Q7. What is the total farm area in each State used for nursery production – and I would like you to give me outdoor area first and then undercover including greenhouses, cold frames, cloth houses and lath houses?

DP note: allow for hectares and acres, convert at computer stage

	NSW	VIC	QLD	SA	WA	TAS	NT	ACT
Outdoor space								
Indoor space								

Q7. During the 2020-21 financial year, did you purchase plants from other Greenlife producers or nurseries for immediate resale?

Yes ----- 1
No ----- 2

Q8. What was the total value of the plants purchased from other Greenlife producers or nurseries?

Q9. How many plants in total did you purchase?

Q10. What was the total value of these plants when sold?

Q11. During the 2020-21 financial year, did stock shortages affect your ability to fill customer orders?

Q12. What was the total value of sales lost due to the inability to fill these orders? If you don't know an exact amount, please provide your best estimate. \$ _____

Q13. Would you be able to provide accurate information on the total number or value of plants your business sold in the 2020-21 financial year or would you have to give me an estimate?

- Q14. (By state if operate in more than one state) In the 2020-21 financial year, approximately how many plants (including resale) did your business sell to ... *read out*
- Q15. And what was the total value (including resale) excluding GST in the plants sold to (from Q13) in 2020-21 ...

	NSW	VIC	QLD	SA	WA	TAS	NT	ACT
Whole sale nurseries:								
Number of plants								
Value								
Retail nurseries:								
Number of plants								
Value								
Revegetation, including forestry:								
Number of plants								
Value								
Local, State & Federal government departments including water corporations, RTA, schools, etc:								
Number of plants								
Value								
Landscapers, developers and builders:								
Number of plants								
Value								
Primary industry:								
Number of plants								
Value								
Direct to consumers/public:								
Number of plants								
Value								
Other (specify): <i>DP note: allow for more than 1 other</i>								
Number of plants								
Value								
Only able to provide total sold/total value:								
Number of plants								
Value								
TOTAL (computer calculate and confirm with respondent):								
Number of plants								
Value								

- Q16. During the 2020-21 financial year, how many plants did you sell in the following categories (including resale)?

If operating in more than one state:

During the 2020-21 financial year, how many plants did you sell in the following categories in each State?

And what was the total value of (from Q15) plants sold (including resale)? If you don't know exactly, please give us your best estimate. *Record in grid. National response only.*

	NSW	VIC	QLD	SA	WA	TAS	NT	ACT
Propagation plants (eg, plugs, tubestock, cuttings, tissue culture):								
Number of plants								
Value								
Herbs and vegetables (excluding seeds and bulbs):								
Number of plants								
Value								
Fruit trees, nut trees and vines (excluding seeds and bulbs):								
Number of plants								
Value								
Bedding and potted colour (eg. annuals):								
Number of plants								
Value								
Indoor plants (excluding seeds, bulbs):								
Number of plants								
Value								
Perennials, trees and shrubs:								
Number of plants								
Value								
Other (including seeds, bulbs, water plants, shot seed, etc)								
Number of plants								
Value								
TOTAL (computer calculate and confirm with respondent):								
Number of plants								
Value								

- Q17. In 2020-21 did you sell plants to 'big box' retailers such as Bunnings, Mitre 10, Big W or other large retailers?
- Yes ----- 1
- No ----- 2

- Q18. In total, what percentage of your sales to retail nurseries went to these 'big box' retailers?

- Q19. For the 2020-21 financial year, did COVID-19 disruptions/restrictions have any impact on the total value of your Greenlife sales (all categories, not only sales to 'big box' retailers):

- Q20. And as a result of COVID-19 disruptions/restrictions, did the total value of your Greenlife sales in 2020-21:
- Increase ----- 1
- Decrease ----- 2
- Q21. (Q21a) In your best estimate, what proportion did your total Greenlife sales *increase* in 2020-21 as a result of COVID-19?
- (Q21b) In your best estimate, what proportion did your total Greenlife sales *decrease* in 2020-21 as a result of COVID-19?
- Q22. Do you know what your business's total operating costs or expenses were for the 2020-21 financial year, so this includes input costs, wages, cost of goods sold, transport costs/freight, rent etc?
- Yes, can provide an accurate figure ----- 1
- Yes, but only a guesstimate ----- 2
- No ----- 3
- Q23. And what were your total operating costs or expenses (including input costs, wages, cost of goods sold, transport costs, rent) (*or estimated total operating costs if Q22 = 2*) for the 2020-21 year?
- Q24. Approximately what proportion of your business turnover was taken up by operating costs or expenses for the 2020-21 financial year?
- Q25. Which of the following best describes your nursery business currently. Is it ...
- In an expansion phase ----- 1
- In a steady phase because it was difficult to expand ----- 2
- In a steady phase because it is where it needed to be ----- 3
- In a contracting or winding down phase ----- 4
- A new business just starting up ----- 5
- Q26. At this point in time, what is the intention for the business over the next 5 years? Is the intention ...
- To grow the business ----- 1
- Keep the business in a steady phase ----- 2
- Contract or wind down the business ----- 3
- Sell it as a business to another person or company ----- 4
- Sell the land to a developer ----- 5
- Wind down and close ----- 6
- Do not read out/avoid* Can't say ----- 7
- Q27. Overall, how do you feel about the future of the nursery and garden industry? Would you say you feel ... (*read out*)
- Very positive ----- 1
- Fairly positive ----- 2
- Fairly negative ----- 3
- Very negative ----- 4
- Do not read* Neutral ----- 5
- Do not read* Unsure ----- 6
- Q28. Why do you say that? *Probe fully*
- Q29. In the 2020-21 financial year, did your nursery business make an operating profit?
- Yes ----- 1
- No ----- 2
- Don't know ----- 3
- Refused ----- 4
- Q30. And do you expect to make an operating profit in the 2021-22 financial year?
- Yes ----- 1
- No ----- 2
- Don't know ----- 3
- Refused ----- 4
- Q31. Compared to the average of the past 5 years, do you expect profit levels for the 2021-22 financial year to be ... *read out*
- Considerably higher ----- 1
- Slightly higher ----- 2
- About the same ----- 3
- Slightly lower ----- 4
- Considerably lower ----- 5
- Avoid* Don't know yet ----- 6
- Q32. During the 2020-21 financial year did you invest in either infrastructure, new technology or training and education for the business?
- Yes, new infrastructure ----- 1
- Yes, new technology ----- 2
- Yes, training and education ----- 3

- No ----- 4
- Q33. Approximately how much did you invest in new infrastructure during 2020-21?
- Q34. Approximately how much did you invest in new technology for the business during 2020-21?
- Q35. Did you or someone within your business participate in the 2019 nursery industry statistics survey?
- Yes ----- 1
- No ----- 2
- Can't say/unsure ----- 3
- Q36. Have you or someone within your business used the excel data benchmarking tool that is sent to those completing the survey or is available on request through Hort Innovation or Greenlife Industry Australia?
- Yes ----- 1
- No ----- 2
- Haven't received ----- 3
- Can't say/unsure ----- 4
- Q37. Has using the benchmarking tool influenced your business management decisions in any way at all?
- Yes, a lot ----- 1
- Yes, a little ----- 2
- No ----- 3
- Can't say/unsure ----- 4
- Q38. May I ask your age please?
- Q39. And how many years has your nursery business operated for?
- Q40. Are you the ...
- Owner or joint owner of the business ----- 1
- Manager ----- 2
- Other role (specify) ----- 3
- Q41. Record gender