Report and Analysis
Export Market Surveys
Canada and US
(Fieldwork September 2006)

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Contents

Note: there is no Q 9, or Chart 9

Introduction

This document is part of Phase I of the Export Strategy project and is both a reporting and an analysis of the telephone surveys administered to purchasers of plants in 4 Canadian provinces and 11 named and several other US states. A total of 156 respondents were surveyed. The objective of the survey was to explore the purchasing patterns of wholesale nurseries, garden centres, broker/re-wholesale operations, landscapers and buying groups with an ultimate view to aligning BC's export strategies with the realities of the market in 2006.

Each question is examined, and charted in a manner intended to be informative, easy to read, and to report beyond what is immediately discernible by reviewing the raw data. Many observations and comments are intended to inform the marketing strategy development process which is the planned outcome of this project.

Western US data has been separated out from the global US responses given our interest in this geographic market.

Where possible, each question and its results are related back to the 1998 research study and to the KPMG report prepared in 2002 with a view to demonstrating what has changed, and what remains the same.

A further document will explore the 1998 Export Development Business Plan, and in light of the results and observations here, discuss which among the initiatives proposed at that time have been accomplished and why/why not.

The survey instruments and resulting raw data are included as Appendices for those wishing to relate the interpretation of each question to the original results of the telephone survey.

It should be said that in addition to 156 being simply a small number of respondents, telephone surveys do not provide depth, particularly in that they are administered by banks of telemarketers rather than industry folks who understand the ins and outs of each question – the information received is purely objective and numerical, There is no opportunity for probing, for opinion, for recommendation and they can not portray anything of the nature of the business, rather just the data. And, given the fact that the survey requires respondents to recall various aspects of purchasing activity in the past, depends to a large degree on their memory.

In some cases, Eastern US states primarily, the number of respondents in a region is so low as to provide anecdotal input only.

Export Market Survey Results - Canada & US

Overview

Total respondents – 156

- Canada – 84
  - *Ontario, Alberta, Quebec, Manitoba*
- US West – 43
  - *Washington, California, Idaho, Oregon*
- US Central – 6
  - *Michigan, Illinois*
- US North East – 14
  - *New York, Massachusetts, New Jersey, Pennsylvania*
- Other US – 9
  - *unspecified*

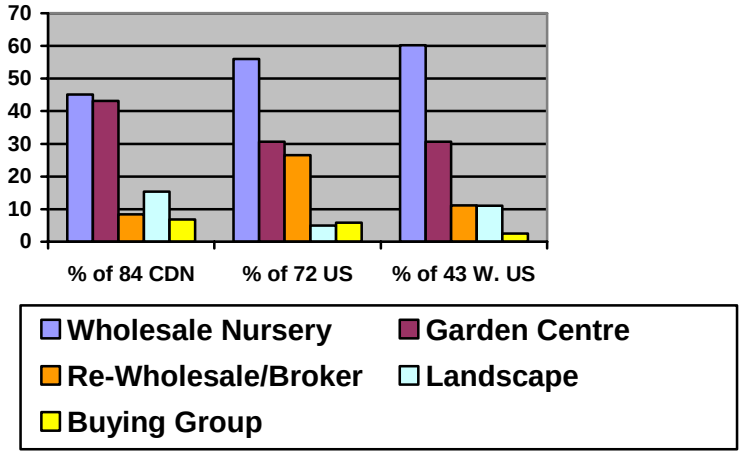
A number of states considered important for BC exports were not specifically covered - Minnesota, Ohio, Wisconsin, Connecticut, Maine, Utah, Montana and Colorado, however they may be included in 'Other US'.

From the raw data which averages results of the full 156-respondent field, results have been separated into:

- Canadian – 84 respondents,
- US West – 43 respondents
- US Total – 72 respondents.

Our principal interest here is US perceptions – Western and Total.

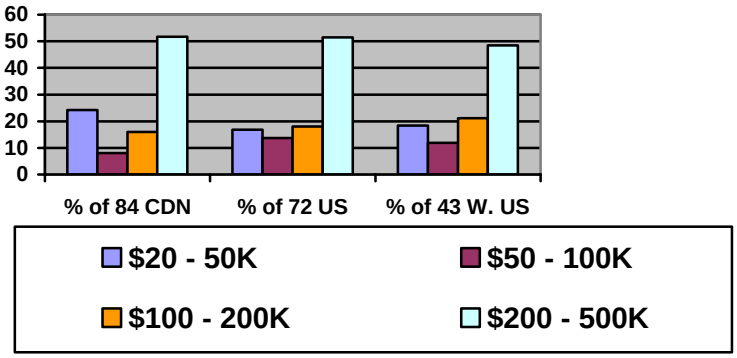
1. Primary Business of Respondents, by Category and Region



What this chart tells us: that of the 84 Canadian responses obtained, 45% were Wholesale Nursery operations, 43.2% Garden Centres, and so forth.

There were 156 respondents in all: 84 Canadian and 72 US, and of the latter group, 43 were W. US. Respondents were permitted to select more than one category. The majority, roughly 88% overall, were wholesale nursery and garden centre operations, although they could operate in other categories as well. Few buying group, landscape and broker respondents were located; however our greatest interest for export development purposes is in wholesale nursery, especially in the US. Wash, Idaho and California responses in particular are sufficient enough in numbers to carry some weight and allow for a degree of confidence.

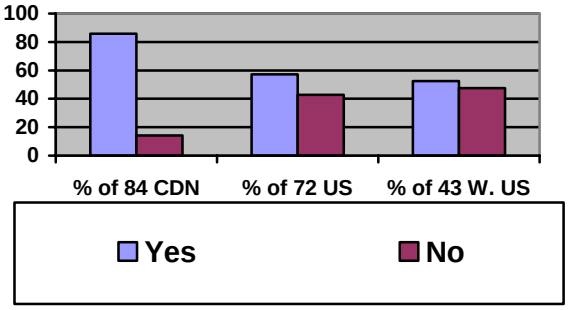
2. Total Purchasing by Region



What this chart tells us: that of the 72 US responses obtained, 51.5% have plant material purchases between $200 and $500K annually and that of the 43 Western US responses obtained, 11.9% have plant material purchases between $50 and $100K per year, and so forth.

About half of all 156 respondents have annual plant purchases in the highest range and, as significant buyers, we can have some confidence in their responses on most of the questions as this would be an indication of length and depth of experience.

3. Ever Purchased from BC



What this chart tells us: that of the 72 US responses obtained, 42.7% have never purchased plants from BC, while of 43 Western US responses obtained, 52.5% have indeed purchased plant material from BC, and so forth.

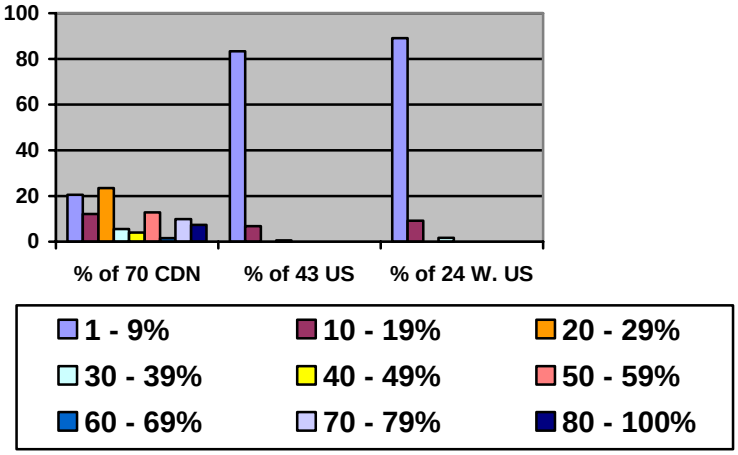
The highest 'yes' response is Canadian, specifically Ontario, Alberta, Quebec and Manitoba, with Manitoba close to, and Quebec at, 100%. Interesting that of the 49 Ontario responses, 11 have never purchased BC plant material – or about 20%.

In the Eastern US there were two 100% responses – Pennsylvania and Massachusetts – and they are all relatively big purchasers of plants generally. None of the New Jersey respondents have purchased BC plants, however 2 of the 3 respondents from that state are quite small, and are wholesalers.

The 3 Oregon respondents are all wholesalers and 2 of them of a significant size; additionally 2 of them have purchased from BC and we can probably infer that those are the 2 large operators. Generally good 'yes' response from the Western US, with 15 of 19 Washington respondents reporting purchases from BC.

The more operators who have bought from BC, and had a good experience which we get into later, the easier it is to keep them buying from BC nurseries. The fact that some have not bought from BC is not necessarily a negative about BC – their needs are simply met elsewhere, as in the case of Idaho where respondents buy heavily from Oregon right next door. New Jersey, with no BC purchases, also buys from Oregon as well as within its own borders.

4. Of BC Product Purchasers, % of Total Purchases from BC



What this chart tells us: that of the 24 respondents in the Western US who have bought from BC, only 1.7% of them buy as much as 30 – 39% of their plant material from BC – that being one respondent in Washington. The two Oregon respondents who have purchased from BC are big operators - $200 - $500K in purchases overall, and up to 10% of that is from BC. Of these same 24 Western US respondents, 89.1% of them allocate 1 – 9% of their buying to BC product. With precedent set and the ice broken, this can be viewed as opportunity.

Not surprisingly, more Canadian respondents buy from BC, Alberta in particular, with one reporting 100% of their plant purchases coming from our province. Thirty-one Ontario respondents buy as much as 29% of their plants from BC, however, also as might be expected, the majority of the buying is from local Ontario producers.

5. Ranking of Satisfaction Dealing with BC Nurseries 2006

	Very Dissatisfied	Dissatisfied	Uncertain	Satisfied	Very Satisfied
	1	**2**	**3**	**4**	**5**
Overall	.9	3.5	20.4	45.1	29.2
Timeliness	2.7	8.8	15.0	45.1	28.3
Selection	na	2.7	29.2	45.1	21.2
Price	4.4	10.6	27.4	25.7	31.9
Quality	1.8	4.4	16.8	40.7	35.4
Service	.9	4.4	16.8	46.9	30.1
Arrival cond.	.9	.9	18.6	53.1	26.5
Labeling	.9	5.3	22.1	43.4	24.8

('na' signifies that no respondents chose this ranking)

Looking again at customers of BC product we find that the seven 'satisfaction' criteria rank* as follows:

1. Arrival
2. Service
3. Quality
4. Timeliness
5. Labeling
6. Selection
7. Price

* Ranking obtained by averaging the 'Satisfied' and 'Very Satisfied' figures in Chart 5, above.

There were some isolated bad experiences but overall the results were positive. It is possible to see in the detailed results that one or two Ontario buyers have had a bad experience that colours their responses on a number of fronts throughout the survey.

Remember, they were being asked to recall buying experiences that likely took place months before amongst dozens of other supplier experiences they would have had at the same time of the year. There is negative response from US buyers, although a couple were 'uncertain'.

In 2006 desirable attributes are ranked as follows (per Chart 8):

1. Quality
2. Reliable delivery
3. Selection
4. Service

5. Price
6. Availability
7. Payment schedule
8. Labeling
9. Currency exchange
10. Loyalty

We can see that BC ranks well on Service and Quality, both of which are deemed to be in the top 5 of important attributes. Price is ranked as the 5th most important attribute and BC ranks 7th on this - the BC-favourable gap has closed on this important criterion, likely as a result of the dollar's rise in the last 18 months. Price, service and delivery timeliness are more or less in line, remembering the inexact nature of this phone survey. The Ontario negativity mentioned above can be seen in the raw data tables here.

See Question and Chart 8 for further analysis on desirable attributes and a comparison between 1998 and 2006 results, indicating whether BC has made progress in the areas that were a concern. It is important to remember, again, the small sample size in this survey and the fact that the respondent pool in 1998 and 2006 was not the same. Also important - we know now that word-of-mouth is a big part of how buyers find plants, and presumably suppliers of plants. One bad experience is probably going to colour opinion about other producers in a region that a buyer hasn't done business with, unless there is a strong pre-existing relationship.

6a. Of BC Product Purchasers, % Reporting Negative Experience

Issue	% Reporting
Poor quality	13.3
Damaged in transit	7.1
Lost/missing/late orders	7.9
High freight cost	3.5
Prices high	.9
Labeling poor	3.5
Order misunderstood	2.7
Poor loading/packaging	2.7
Too young/undersized	3.6
Bugs/disease	1.8
Lack of shipping options	.9

Notes:

- 10.6% reported 'other' issues, non-specified
- 49.6% reported no negative experiences

It is unclear how recent these perceptions/memories might be – within the past year and fresh, or a lingering niggling incident that occurred 8 years ago. US respondents reported almost no issues although there were many fewer respondents. Almost no US issues, although many fewer respondents surveyed. Those issues that were reported by US buyers were concerned with quality – poorly formed plants or roots, size of plants and bugs or disease. Plant quality and shipping account for most Canadian issues – freezing, late, lost. Of the 38 Ontario respondents, all but 9 reported negative issues,

while amongst the 17 Alberta respondents, only 5 had problems to report. Is this possibly a function of shipping distance?

6b. Of BC Product Purchasers, % Positive Experience

Issue	% Reporting
Good quality	31.0
Good/competitive pricing	17.7
Overall good service	15
Good selection	6.2
On time delivery	4.4
Availability of rare items	2.7
Freight costs good	1.8

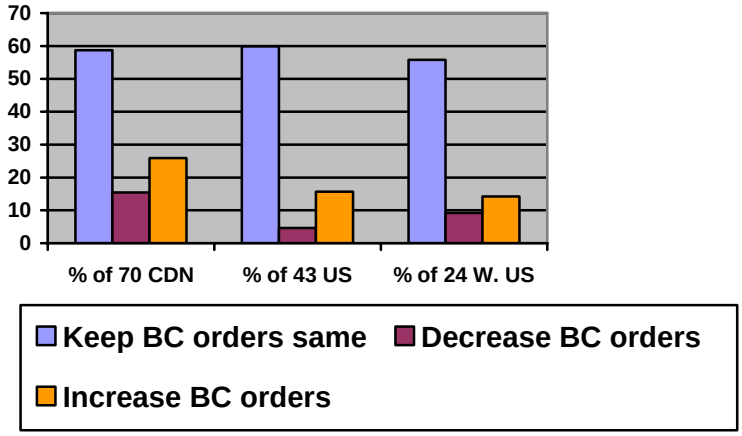
Notes:

- 4.4% reported 'other' issues, non-specified
- 32.7% reported no positive experiences; this possibly means they can't remember since it's the negatives that usually stand out. And 3.5 reported 'good experience' with BC nurseries, non-specifically.

It is heartening to see that many more good than unfortunate experiences are reported overall, and that they were in the important categories of quality, service, pricing and selection. Some respondents, US and Canadian, reported no good experiences but it is likely a matter of not remembering the positive, while dwelling on the negative.

Again, remember that no timeframe was specified for responses.

7a. Of BC Product Purchasers, Buying Plans for 2007



What this chart tells us: that of the 70 Canadian respondents who have purchased BC plants in the past, close to 60% plan to keep their BC orders in 2007 the same. Of the 24 Western US respondents who have bought BC product in the past, 14.2% plan to increase their orders from BC in 2007, and so forth.

This is a positive result – most plan either to increase or maintain their BC purchasing levels. Reasons stated follow in Charts 7b and 7c.

7b. Of 15 BC Product Purchasers Decreasing BC Orders - Reasons

Reason	% Reporting
Decreased demand	13.3
Freight/fuel costs	13.3
Can find product locally	13.3
Doing more ourselves	13.3
Specialty plants available elsewhere	6.7
Local plants fare better in our climate	6.7
SOD	6.7
Buying more in US	6.7
Pricing	6.7

Notes:

- 13.3 % reported 'other' reasons, non-specified

The few respondents planning to decrease orders cite freight costs, same plants available locally, local material better suited to climate as their reasons. These are things we can't impact. One Manitoba respondent plans to buy more from the US – according to Chart 6a this could be a quality issue. This was the only respondent of the 15 who planned to decrease BC orders that stated that they planned to buy more in the US in 2007. Additionally, only one respondent, in Ontario, cited freight costs as an issue.

Why is this important? In a business in which relationships are viewed as key to maintaining levels of buying, it takes quite a severe issue, or uncontrollable environmental issue, to have business drop off. Any decrease ought to be thoroughly investigated.

7c. Of 20 BC Product Purchasers Increasing BC Orders - Reasons

Reason	% Reporting
Business/demand generally better	55
Good relationship with BC supplier	15
Selection & availability improving	15
Pricing good	15
Product arrives pre-priced/labeled	5

Notes:

- 15% reported 'other' reasons, non-specified

The overwhelming reason for increasing purchases from BC is an improved business climate and anticipated greater demand, as opposed to anything in particular about BC. I am guessing that if they were asked whether they planned to buy more from other jurisdictions as well, that the % would be similar. Overall, the numbers or respondents planning to increase BC orders are small – this doesn't make for a particularly actionable result.

8. Relative % Importance to Buyers of Various Attributes 1998/2006

	Not Important/ Considered	Not Very Important	Somewhat Important	Important	Very Important
	1	2	3	4	5
Quality	na/na	na/na	na/3.2	6.7/16.0	93.8/80.8
Selection	na/1.9	na/1.3	14.3/10.9	42.9/38.5	42.9/47.4
Availability	na/1.3	na/3.8	14.3/19.2	35.7/39.1	46.7/36.5
Labeling	na/10.9	na/7.7	14.3/28.2	35.7/34.0	50.0/19.2
POS	7.1/32.1	21.4/21.8	28.6/21.2	35.7/16.0	7.1/9.0
Service	7.1/1.3	18.0/.6	25.0/14.7	35.7/43.6	21.0/39.7
Reliable del.	na/.6	14.3/1.3	14.3/9.6	21.4/32.1	50.0/56.4
Price	na/1.9	na/5.8	42.9/19.9	35.7/34.0	21.4/38.5
Pay sched.	21.4/10.3	14.3/7.7	21.4/23.1	28.6/36.5	14.3/22.4
Del. time	1.9/na	3.2/na	16.0/na	34.0/na	44.9/na
Curr. exch.	na/54.5	na/7.1	na/12.2	na/13.5	na/12.2
Loyalty	na/na	7.1/na	28.6/na	21.4/na	42.9/na

Notes:

- Neither the questionnaire nor the methodology, let alone the respondents themselves, were the same in 1998 and 2006. We can not therefore state categorically that improvement (or decline) is absolute on this or that aspect. Consider this chart as an indication only.
- 'na' signifies that no respondents chose this ranking, or the aspect was not covered.
- 1998 Service rankings are a combination of 'Customer Service' and 'Regular Sales Visits', the latter of which was not covered in 2006.
- Loyalty as criteria was not included in 2006 however anecdotally, and in terms of 1998 rankings, it is key.
- Delivery time was not covered in 2006.
- 2006 survey included Hardiness as a measure. Not included here as figures are high and Quality covers this aspect.
- Currency exchange not covered in 1998.

Quality

All in all, results on this criterion were as expected, high, although not as high as in 1998. We have to assume some errors in the survey as some respondents said that 'hardiness' was not important, or an issue for them when choosing plant material to purchase. Generally it is important, as with 'quality on arrival' generally, but some answered that this was not important either. Possibly from a financial point of view these

respondents had in mind that they deduct poor quality material from the invoice and in that way it would not be an issue.

Selection
Very similar to 1998 – will always be important.

Consistent Availability
Slightly less important than 1998, but again, the survey format is different and it would wise to assume availability is still near the top of the list. A couple of Canadian respondents said consistent availability is not very important! This could be an aberration, or it could be these respondents feel that they can always get an item somewhere else, or perhaps they are accustomed to settling for a substitute.

Labeling
Fairly important, as it was in 1998. Seems to no longer be 'very important' – results in the highest category are down in 2006.

POS
Similar results to 1998, although more seem to not consider this aspect. Possibly they do their own now, technology allowing that more than then. Seems to be of middling importance overall.

Service
This criterion seems more important now than 1998. Lack of or poor service in the past is a reason for some of the decisions to not purchase from BC in 2007. Have to assume it's key to the overall purchase package and is no doubt related to the value of relationships, although this word was not used.

Reliable Delivery
Hugely important overall, although 9.6% said it was 'somewhat important'. Suspect those who said it was not didn't understand question. 'Reliability' presumably would connote timing, condition of product on arrival, secure packing and packaging, skilled unloading etc.

Price
Shift here as expected – almost twice the percentage of respondents felt it was 'very important'. Mostly 'somewhat important' in 1998, but now it's very important and important, for Canadian as well as US purchasers. For Canadians this would not be related to the exchange rate, but more a matter of efficient business management.

Payment Schedule
Times are tighter; businesses need to run more efficiently. This aspect is viewed as more important now than in 1998.

Delivery Time
Very important. Relates to quality on arrival. Of the full 156 respondents, 8 felt this was 'not very important' or 'not considered', which seems odd. Possibly these do not buy from far away and therefore transit time is not a huge concern. This criterion was not covered in 1998.

Currency Exchange
Canadian currency was not specified – but very important to US which imports not just from Canada, but Europe also. This aspect is closely related to 'price', which has been covered, and may be considered more a general philosophical question in this table. For the most part it seems to be not a big issue

Loyalty
Not covered in 2006. Was important to US, but not overwhelmingly so. We have anecdotal indications that relationships play a big part in ensuring transactions between the US and Canada.

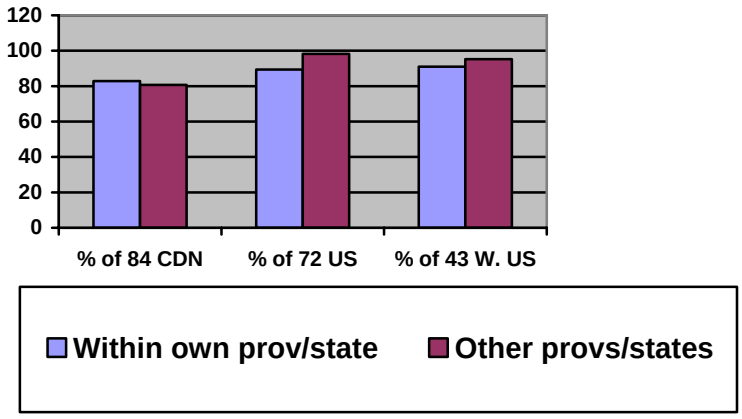
10. Other Buying Criteria (NB there is no Q 9 or Chart 9)

Other Key Criteria	% Reporting
Quality/size	6.4
Selection/good mix/rare items	2.6
Service/relationship	1.9
Freight costs	1.9
Bilingual labeling (Que. only)	1.9
Year-round availability	1.9
SOD dealt with	1.9
No substitution	.6
Price	.6
Border easy	.6

Note: 73.1% said there were no other important issues beside those covered by Chart 8.

Most of what is covered by this question is addressed in Q 8. Quality is mentioned most often, followed by selection, and followed then by service.

11a. Plants Purchased Locally and Otherwise



What this chart tells us: that of the 84 Canadian respondents, 82.9% buy within their own province; of the 43 W. US respondents, 88% buy within their own state. The % buying outside their own jurisdictions is about the same.

It would be interesting to pose this and other questions to BC operators.

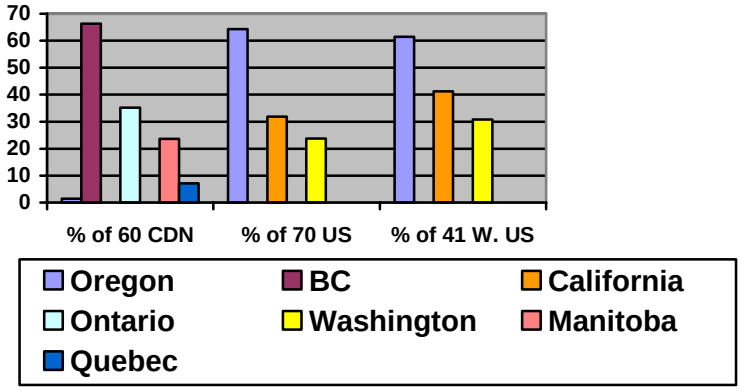
Most buy from own state/province. Most US buy from Oregon, California and Michigan. Most Canadians buy from BC, Ontario and Manitoba, with Ontario also buying from Quebec.

- Ontario – BC, Quebec, Holland
- Alberta – BC, Manitoba
- Quebec – BC, Ontario, Holland, France, Belgium
- Manitoba – BC, Alberta
- Washington – Oregon, BC, Holland, other Europe
- California – Oregon, Washington, New Zealand
- Idaho – Oregon, California, Washington, Minnesota, mid-west
- NY – Oregon, Ohio, Pennsylvania, North Carolina, eastern states
- Massachusetts – Oregon, California
- New Jersey – Oregon
- Illinois – Oregon, Ohio, Michigan
- Oregon – various - not much concentration, Michigan had two reports
- Pennsylvania – Oregon, Ohio, Michigan, South Carolina
- Michigan – no concentration

In the bigger picture, Canadian companies purchasing outside the country buy US, and visa versa, for the most part.

Why is this important? BC needs to know what particular needs – product, price, selection, service etc – are being satisfied as well as or better by growers other than BC's. This is answered by Q 12.

11b. Where Purchase Outside Own Region



What this chart tells us: that of 41 Western US firms purchasing outside their own state, 61.5% purchase from Oregon, 41.2% purchase from California, and 30.8% purchase from Washington, and so forth.

All US respondents, 100%, purchasing outside their own state purchase from Oregon (among other areas).

All Canadian respondents buying outside their own province purchase from BC, (among other areas).

Looking at all Canadian respondents purchasing outside their own area, the preference within Canada is as follows:

- BC 31.4%
- Manitoba 10.3%
- Quebec 9.0%
- Sask 6.4%
- Alberta 3.2%

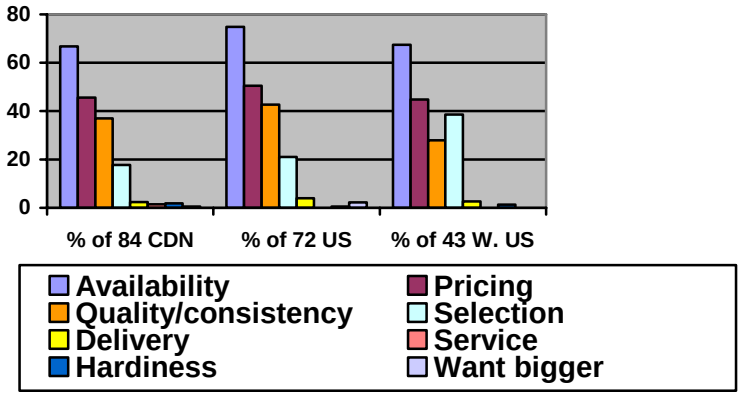
Looking at all US respondents purchasing outside their own area, the preference within the US is as follows:

- Oregon 34.6%
- California 18.6%
- Washington 12.1%
- Ohio 7.7%
- Michigan 5.8%
- Tennessee 5.1%

More interesting facts amongst those jurisdictions reporting purchases outside their own state or province:

- 34% of Canadian firms surveyed buy from the US
- 26.3% of US firms surveyed buy from Canada
    - *47.3% of W. US firms buy from Canada*
- 24.5% of Ontario firms, and 50% of Quebec firms buying out of province, buy from Holland.

12. Why Purchase Outside Own Region



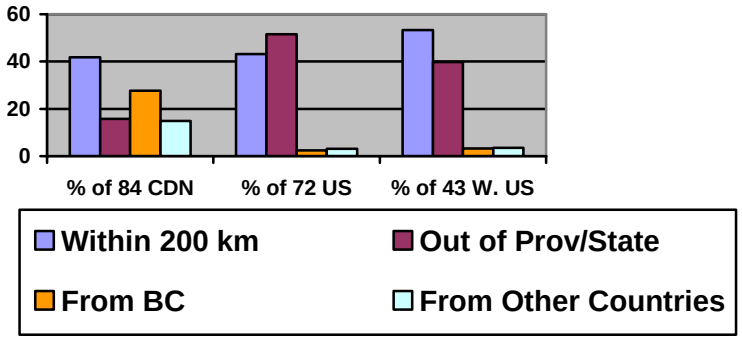
What this chart tells us: that of 72 US respondents, 74.8% buy outside their region because of availability issues; and 21.1% does so for selection reasons. Of 84 Canadian respondents, 45.5% buy outside their regions because of pricing and 1.5% do so because of service issues, and so forth.

Across the board, for US and Canadian respondents, the reasons for buying outside the home region are:

- availability of items not available at home
- pricing
- quality
- selection.

These are the hot buttons that BC growers can focus on if they are interested in attracting business outside our province, US or Canadian. Possibly there are items that can not be grown here, but the other variables can be controlled to one degree or another.

13. Percentage of Purchases from Various Distances



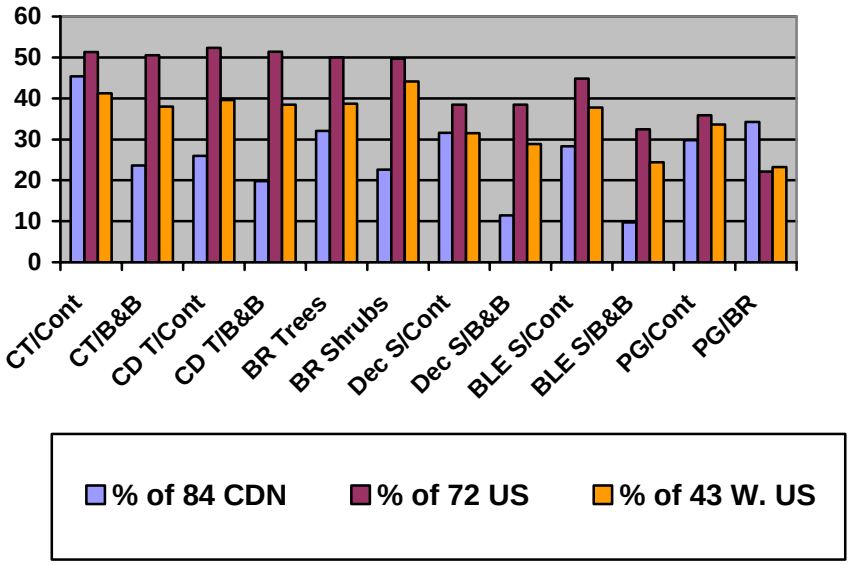
What this chart tells us: that of 72 US respondents, 43.1% or purchases come from within 200 km of their operation, and 51.5% or purchases come from outside their home state. Of 43 Western US respondents, 3.3% of their purchases come from BC. Of 84 Canadian respondents, 27.6% of purchases come from BC and 14.8% from other countries, and so forth.

Significant percentages of US purchases come from outside the home state, but few of those come from BC as we see in Q 11 and 12. Alberta is a good BC customer with almost half of that province's non-Alberta purchases coming out of BC. Ontario with a bigger horticulture industry – less so.

This question shows importance of geography and distance in the choice of suppliers.

This question could have been confusing for respondents. To an Ontario respondent, 'out of province/state', and 'out of country' could potentially mean the same thing, yet the results are different. We have to assume the survey team spelled this out, but it's another reason that a survey of this type, so industry-specific, would be better administered by a group familiar with the industry and how it operates.

14. Percentage of Plant Types Purchased Outside Area



Notes: Plant types left to right:
- Coniferous trees – container
- Coniferous trees – B&B
- Caliper deciduous trees – container
- Caliper deciduous trees – B&B
- Bareroot trees
- Bareroot shrubs
- Deciduous shrubs – container
- Deciduous shrubs – B&B
- Broadleaf evergreen shrubs – container
- Broadleaf evergreen shrubs – B&B
- Perennials and/or grasses – container
- Perennials and/or grasses – bareroot

What this chart tells us: that of the 43 Western US respondents, 38.7% of Bareroot Trees and 33.6% of Perennials and/or Grasses in Containers are purchased outside their own state, and so forth

We have to assume this would have been a difficult question to answer accurately, without checking invoices, given the nature of the survey. More than some of the other questions, this one is really a matter of guesswork on the part of respondents. However, it has some value in demonstrating the scope of purchases of specific product types and could provide some assistance to BC exporters looking to provide some specific traction to sales presentations. The raw data can be studied to determine which individual states and provinces buy what percentage of various product types from outside their own region and this could be a study all on its own.

15. Do Fuel Costs Affect Where Plants Purchased?

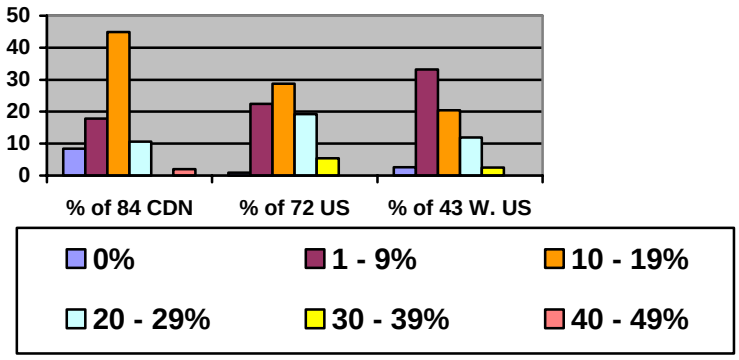
Yes 66.7%
No 32.7%

Note: It would be interesting to determine what percentage fuel cost contributes to the price of plant material of various types and weights, in various parts of North America.

Looking at the raw data, fuel costs appear to be of greater concern to Canadian respondents, and to California and Michigan, dealing with great distances. All New Jersey respondents indicated that fuel costs were not influencing where they purchase – and indeed we see that 75% or purchases are made within 200 km (Q 13). Two of 3 Oregon respondents indicated that fuel costs were not an issue – this could speak to the abundance of product available right at home.

All in all, fuel costs are a concern and are likely to remain so for some time, necessitating a workaround of some type on the part of BC exporters.

16. Percentage Freight Costs Acceptable

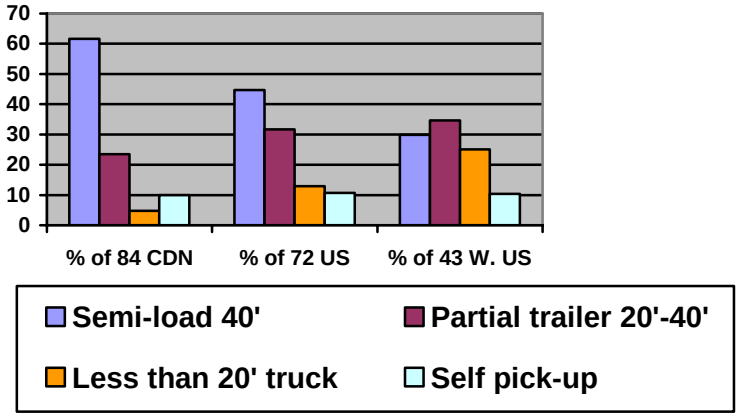


What this chart tells us: that of 84 Canadian respondents, 8.4% feel that freight should not factor into the cost of product at all; with just 1% of the 72 US respondents feeling the same way.

The majority of respondents seem comfortable in the 10 – 19% range; however there are some aberrations where an extremely high percentage was felt to be acceptable. We should likely discount these – 1 Ontario respondent was comfortable with 40 – 49% and two US firms comfortable with 30 – 39%. There has to be a tipping point here and based on this survey we could guess that that point is 30%.

Almost 1 in 5 of respondents overall chose 'do not know', or 'refused'. Possibly this particular calculation has not had be a priority until fairly recently and they did not have the information top-of-mind.

17. Delivery Methods by Region

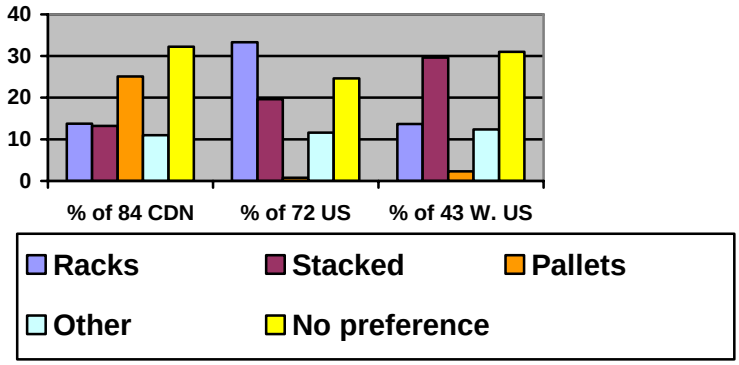


What this chart tells us: that of 84 Canadian respondents, 61.6% of their plant material arrives on 40' semi-load trailers, and they pick 10% up themselves.

While we can't relate this information to the type of business (wholesale nursery vs. broker vs. garden centre), we can say that the larger operations bring in the 20 – 40' trucks and the smaller ones, buying locally more often than not, are more likely to pick up their orders themselves.

Potentially there is a role for the BCLNA in coordinating trucks – this came up at an early focus group.

18. Packing Preferences by Region



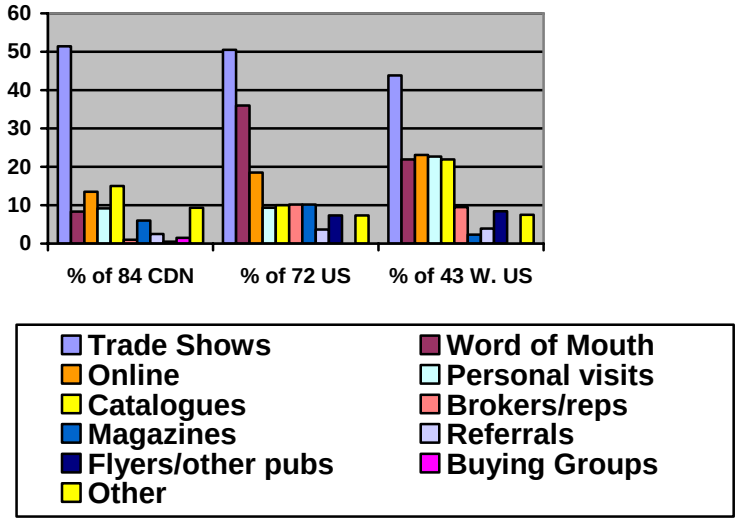
What this chart tells us: that of 43 Western US respondents surveyed, 29.6% prefer their plants to be stacked, and of 84 Canadian respondents, 25.1% prefer pallets.

Racks and stacked is the overall preference, but uniquely in Canada, palletizing orders is popular.

It is interesting that 1/3 of respondents overall have no preference at all – this is the largest category.

The information at hand does not allow us to relate this information to the type of business the respondents are in. Retailers are going to unpack and display in their own way. Nurseries will want some industry standardization and landscapers need to be able to transport easily to the jobsite.

19. Methods of Finding New Plants



What this chart tells us: that 50.5% of US respondents use trade shows for sourcing new plants, while 13.5% of Canadian firms surveyed use the Internet.

Trade shows, ‘word of mouth’ and the Internet are the key methods reported.

There is enough online activity to warrant watching this closely. Anecdotally, export growers have already expressed a wish that the BCLNA provide more online connectivity between them and prospective customers.

Visiting nurseries is also valuable – proximity allowing.

The extent to which trade shows are viewed as important speaks to the comments expressed in focus groups that relationships are absolutely critical to the selection of supplier, export or otherwise.

It would be interesting to be able to relate this information to the type of business.

Other Considerations

One of the BCLNA's ultimate aims is to enhance the garden image of British Columbia with a view to the economic potential of:

- a bigger domestic horticulture industry – nursery, landscape and retail
- increased garden tourism
- increased commercial investment in all regions
- focus on landscape sustainability and heritage preservation
- positioning horticulture as a desirable career option for young people and as a second career

and of course,

- increased export of BC-grown plant material to the US and within Canada.

While the Canada and US Export Market surveys were well-conceived, a number of additional questions presented themselves over the course of preparing this report, questions that would further inform the development of the export strategy for BC growers.

- How far afield does each *type* of business go for plants?
- What kind of packing method preferred by each business *type*?
- Trade show attendance by business *type*?
- What are annual advertising and promotion expenditures, by business *type*?
- What is considered the standard payment schedule?
- Is bad product deducted from invoice on receipt of delivery as a rule?
- How prevalent is the use of grower-supplied POS at retail?
- How important is 'grown in the US' or 'grown in Canada' to selection of supplier, all else being equal?
- How long does the establishment of a solid customer/supplier relationship take in your experience?
- How open are you to entertaining proposals from new suppliers, given the 'break-in' period required? Ask this question to both US and Canadian purchasers, about both US and Canadian suppliers.

It would be useful to pose most of the questions covered in the survey, plus those listed above, to BC operators in all 5 business categories.

These surveys, and this report, can also serve to inform the potential design of a questionnaire for BC industry, a key purpose of which would be to ascertain the reasons that retailers, brokers and landscapers are or are not demonstrating a preference for purchasing BC grown plant material over imported product.

Appendices

Survey Instrument Canadian

Survey Instrument US

Raw Data – Canadian and US