

Illinois Nurserymen's Association

Serving the Illinois Green Industry since 1925

Communications Survey – Results

Introduction

I was pleasantly surprised by the response to the INA's Strategic Communications survey, with nearly 13 percent of active members participating. We received nearly 60 completed surveys, nearly all of which exhibited a high degree of candor and what appeared to be very thoughtful responses. Clearly, those who took the time to participate not only were committed to the association but also were reflective or introspective with their feedback in hopes of enhancing the INA.

As constructed, the survey was intended to measure the feelings and attitudes of INA members toward internal and external communication processes and tools, and also branding or identity issues. It also was designed to gather as much information as possible regarding the members' current practices, strategies and tools utilized as they relate to marketing and/or strategic communications, and to ascertain (to the best of our abilities) what inherent hopes and fears could support or derail future promotional efforts. The goal of this project is to glean from the survey results valuable information to be used in the development of a comprehensive strategic communications plan including but not limited to a coordinated marketing strategy for the association.

I am happy to report that although obviously not scientific, the exercise accomplished what it was intended to do: We do have measurable results which both evaluate current activities and delineate which factors may be most effective in appealing to and motivating our members' current and future customers. These results will be considered carefully and employed to more effectively engage both internal and external audiences of the INA, and to bolster new marketing efforts to ensure the future viability of the Green Industry in Illinois.

Overview

Like with any survey, this one tended to bear out some of what was commonly believed. However, there were a few interesting tidbits that may surprise some. In a few cases, there was such an overwhelming response to the particular question, that the results did more than simply corroborate or substantiate routine conceptions. Generally, those questions were the ones that also elicited additional remarks scribbled in the margins – of course, usually emotionally-charged as well – even though further explanation or comment wasn't requested or invited as part of that particular question.

Last but not least, I had included a series of questions, which asked the respondents to rank in order – thus, prioritizing – different options or alternatives. It was my intention that each would be given its own, unique value that it would not share with another possible answer. For example, if the question asked the survey-taker to rank a series of answers from 5 to 1, with 5 being most important and 1 being least important, I had hoped to get a 5, 4, 3, 2 and a 1. Obviously, my instructions were not clear, as more often than not, there would be several 5s and several 2s or 1s. In fact, I know my directions for those questions were not lucid or logical, as I received several calls asking for clarification. Having already received some completed surveys, and already sensing the pattern that was developing, I told those calling to handle it in whichever way they were most comfortable. Although this didn't match what I originally had hoped to fully garner from the question, by being flexible and altering my evaluation method of those questions, the results still proved extremely valuable as they definitely illustrate the “most” or “least” in something. It just happens to be primarily the extremes, a more polarizing answer to the respective question, and not the range I had anticipated.

Many of the questions asked were redundant by design; however, by changing the semantics, it helped



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me determine whether answers remained consistent despite wording, meaning my question was objective. If answers changed as the questions were posed differently, it could show that my questions were subjective or that I was “leading the witness”. Luckily, in nearly every instance of this, the respondents answers remained consistent and proved that the semantics of the questions did not sway their opinions or their understanding of the situation.

Respondents may have also noticed that some subjects were addressed from both a positive perspective and a negative perspective. Again, this redundancy was employed for the same reason. I am happy to report that these answers remained consistent as well, and thankfully did not conflict when approached from a different angle.

I was especially pleased that in response to those questions that did invite additional comment, feedback or input, most survey-takers obliged and were more than happy to share their vast and varied wealth of knowledge, experience and expertise.

Keep in mind this is a “general” overview. I purposely did not address an isolated case here or there, which may have fallen outside of what is typically deemed as the acceptable bounds of usable results. Like with many surveys or scores in the Olympics, when managing a surplus of information, we may need to dismiss the lone judge who says everything is absolutely perfect and that we have no room for improvement just as we do the one who claims that everything is a disaster or wrong and that the end of the world is near. That doesn’t mean we completely discount their feedback in its entirety, rather we may choose to look past their impassioned pleas to disband the Illinois Department of Agriculture or to strip the University of Illinois of its Hort Program (as two examples). It simply means we do not allow their flip or fanciful answers to skew our meaningful results.

All in all, this proved a very solid survey with strong participation. It yielded quality results that should be extremely valuable to the Illinois Nurserymen’s Association as we set out to enhance our outreach programs and future promotional efforts.

KEY FINDINGS – Naming, Branding & Identity Issues

Although they were the questions I purposely left to be tackled last in the survey, the feedback I received on “naming, branding and identity issues” is most compelling. So they’ll be the first I address in my evaluation and explanation.

Bottom line, results of the survey supported the efforts of those who want to update the name of the association.

In fact, **91 percent of the respondents indicated that the association’s name should be changed**. Only 6 survey-takers did not, with 4 answering in the negative and 1 not answering at all. So of those who actually answered the question, the percent was a slightly higher 93 percent.

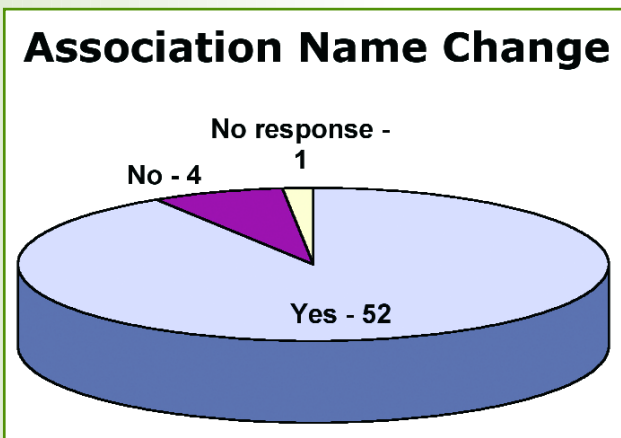
What’s the survey tell us? **4.5 of every 5 members believe the name of the association should be changed**.

This is the most convincing statistic from the entire survey. With numbers in the 90 percentile, you are beyond the realm of what is considered typical or expected answers to a question that’s previously been deemed controversial or contentious. Rather this should be viewed as a “call to action” or a mandate for those responsible for such a change. It also means that those voicing opposition to a change are in a very small minority – 1 of every 10 members – barely mustering any support whatsoever.

However, just as gripping are the numbers reflecting what’s most important about a name or identity.

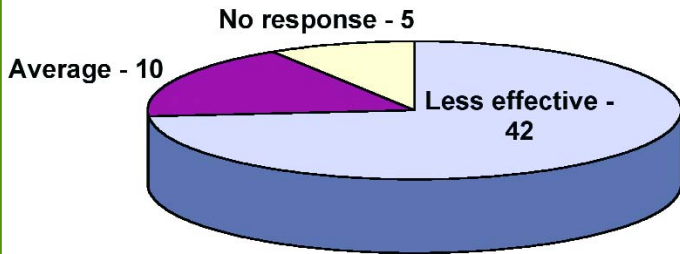
When asked whether our current moniker makes us more or less effective, **80 percent of the survey-takers said less effective**. 42 of 57 were in the “least effective” camp, and 5 of 57 didn’t answer either way leaving only 10 who said it was average. Not one respondent claimed the current name makes the association more effective.

The numbers were just as striking when asked if the association’s current name makes it more or less appealing to new members. A whopping **78 percent believe the association is less appealing to potential members due to its name**. In fact, 38 of 50 expressed

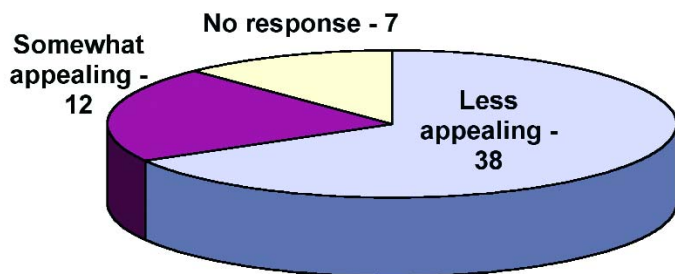




Effectiveness of Name



Name Appeal to Potential Members



concern that the current name makes the organization less appealing. Seven chose not to address the question, period, and of the 12 who did, their collective answer was considered soft (all choosing “somewhat” appealing and none “very” appealing).

When asked if the name accurately reflects the current membership, the results were slightly more mixed. In this case, 19 participants claimed that it did “for the most part.” However, 31 seemed to think that it does “not as well as it could.” Although the percentage – 62 – seems to pale in comparison to the glaring results of the questions above, it’s fairly significant to note that you still have more than 6 of every 10 members who don’t believe it accurately reflects the membership rolls. It’s important to take the time to fully appreciate this particular number as we’re talking about a majority of current members who may at some level feel they are left out or misrepresented, and you certainly do not want to alienate existing membership.

Interestingly, of the 57 completed surveys I received, there was nearly a 50-50 split between male and female respondents. As most industry analysts have been suggesting on an increasingly frequent basis, this appears to be a fairly accurate reflection of the evolving demographics of the Green Industry.

Unfortunately, the opportunity I provided for comments in this section didn’t extract any new or fresh ideas, which could prove constructive if the association chooses to act on any of the above. This section did elicit many informal comments and scribbled messages in the margins, most of which could be combined (after being cleaned up for public consumption) into a collective - “Just do it!”

EXTERNAL COMMUNICATIONS

Whereas, the section of the survey about naming, branding and identity issues may have been the most compelling, the most important section is probably the one that focused on External Communications.

It is the feedback captured in this section that we hope to be able to use to enhance our outreach and recruitment efforts. It also will be used to assist us in determining what tools may be best suited to effectively engage the general public – potential customers for INA members – ultimately to ensure the future viability of the Illinois Green Industry. It is my hope that the results from this section will be considered carefully and referred to frequently as we develop and implement a comprehensive strategic communications plan that includes a new marketing strategy for the association.

Fears and frustrations abound, yet they were much more tempered than expected. Much of the positive outlook and sunny disposition I have come to appreciate while working

with the INA was mirrored in the feedback received throughout this section of the survey. For example, although many people confirmed that they do face fierce competition from the big box stores, many also were quick to point out that the extensive advertising the big box stores do actually benefits the entire green industry or that the big box stores also are customers.

Clearly, respondents consistently acknowledged the threats, so it was not a “head in the sand” attitude, but it was to a much lesser degree than I anticipated. I would say that it was much more of a positive outlook – a “the glass is half-full rather than half-empty” view of the circumstances – than any kind of malaise or disconnect.

Yes, there is trepidation and apprehension, there’s just no alarm or panic. Having said that, most do believe they are adversely impacted by a whole host of competing or adversarial interests. But none of those potential threats stand out as the gravest.

In almost equal numbers, survey-takers tended to agree that the greatest competition comes from:

- “Big Box” stores & other retail chains
- Similar businesses, also members of the INA
- Similar businesses, not members of the INA

Interestingly, half the respondents expressed concern that they are **very likely** to be adversely impacted by “Different hobbies or interests competing for same chunk of time/money,” while the other half indicated that it was either “not very likely” or “not likely at all.” The inconsistency of the collective answer to this question somewhat baffled me. In looking at the sources (who will remain confidential as promised) that provided the feedback, there was no obvious pattern or categories that jumped out at me. The answers did not correlate to the type of business per se, as answers coming from different garden centers conflicted, as did the answers coming from different nurseries, etc. It also couldn’t be attributed to the specific positions within the companies of the respective persons completing the survey.

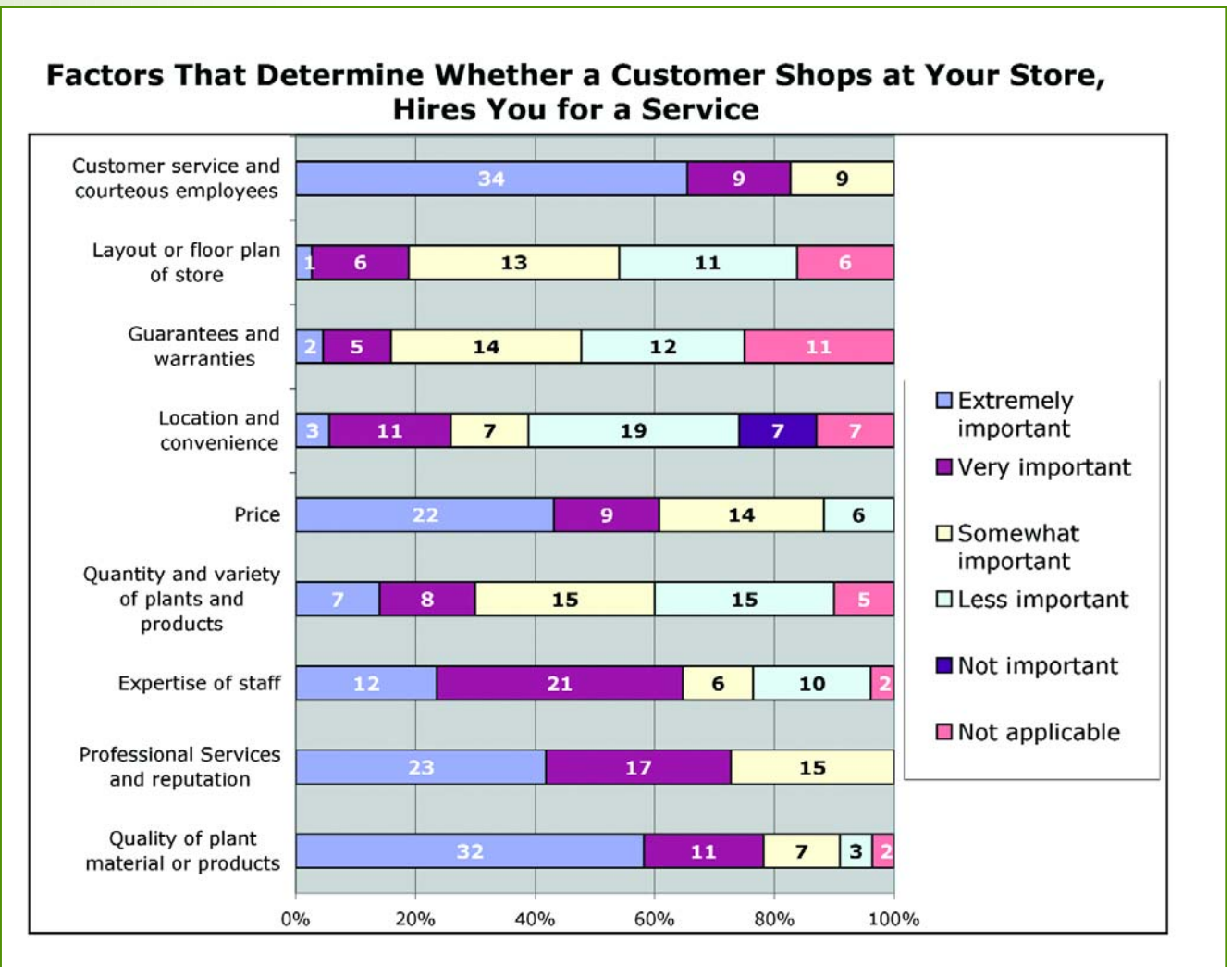
Only a handful of respondents considered catalog companies, soil and water conservation districts or master gardeners and local gardening clubs to be their

competition. However, it may be important to note that there were a considerable number of people who offered unsolicited commentary in reference to the “master gardeners and local gardening clubs” entry, which expressed frustration that their participation in the industry as a hobby was problematic. The public often perceives and recognizes the commitment and expertise of master gardeners or local gardening clubs to be of the same standard as that of the educated, trained and paid professionals in the industry. And this misperception can result in various difficulties when customers – who have invited and then followed that faulty or incomplete advice or direction – call industry professionals after the fact and want them to remedy the situation.

Now for the numbers, the important feedback that makes up the meat and potatoes of the survey.

Which factors are most important in determining whether a customer shops at your store or hires you for a service?

- Quality of plant material or products – 55 total
32 extremely important, 11 very important, 7 somewhat important, 3 less important than other factors, 2 not applicable



- Professional service and reputation – 55 total
23 extremely important, 17 very important, 15 somewhat important
- Expertise of Staff – 51 total
12 extremely important, 21 very important, 6 somewhat important, 10 less important than other factors, 2 not applicable
- Quantity and variety of plants and products – 50 total
7 extremely important, 8 very important, 15 somewhat important, 15 less important than other factors, 5 not applicable
- Price – 51 total
22 extremely important, 9 very important, 14 somewhat important, 6 less important than other factors
- Location & Convenience – 50 total
3 extremely important, 11 very important, 7 somewhat important, 19 less important than other factors, 7 not important at all, 3 not applicable
- Guarantees & warranties – 44 total
2 extremely important, 5 very important, 14 somewhat important, 12 less important than other factors, 11 not applicable
- Layout or floor plan of store – 39 total
1 extremely important, 6 very important, 13 somewhat important, 13 less important than other factors, 6 not applicable
- Customer Service & courteous employees – 52 total
34 extremely important, 9 very important, 9 somewhat important

Which of the following have the greatest impact on the decision-making process of your customers? 10-1 with 10 being highest, 1 lowest

- Price – 8
- Convenience – 6
- Quality of product - 9
- Professional service/reputation – 8
- Quantity & variety of product – 5
- Expertise of staff – 7
- Guarantees and warranties – 7
- Friendly customer service – 9
- Layout, floor plan, appearance - 6

The importance of external communications tools (non-paid advertising) currently used by your business to reach your target audiences or customers:

Of the 17 selections, only 6 registered any measurable results. Not surprisingly, 11 of the listed communications tools don't appear to be employed by member businesses, including Faxes, Press Releases, Posters, Video Tapes/DVDs, Voice Mail Messages, Media Outreach, Speaking Engagements, News Conferences, Interviews with Local Media, Community Meetings, and Public Service Announcements.

The six tools that are utilized seem to be to a high degree by most survey-takers. Interestingly, three of the tools drew out some additional comments, either from:

- respondents who said they presently didn't, but needed to (web site);
- some who said they presently didn't and hadn't previous thought about it, but they thought it was a good idea that they'd consider implementing (reminder cards);
- others who indicated they have had great success – not necessarily hosting their own events – rather joining local civic or charitable groups to raise money for the respective cause or charity while taking advantage of their involvement/ participation to promote their business and to capitalize on the subsequent goodwill (special events).

The importance of using the tools at their disposal:

- Web Site - 49 total
17 Very Important, 18 Moderately Important, 4 Not as Important, 9 Never Use
- Flyers – 46 total
14 Very Important, 22 Moderately Important, 8 Not as Important, 2 Never Use
- Direct Mail – 45 total
11 Very Important, 21 Moderately Important, 8 Not as Important, 4 Never Use
- Newsletter – 41 total
5 Very Important, 18 Moderately Important, 7 Not as Important, 11 Never Use
- Reminder Cards – 44 total
13 Very Important, 19 Moderately Important, 2 Not as Important, 10 Never Use
- Special Events – 49 total
10 Very Important, 24 Moderately Important, 7 Not as Important, 8 Never Use

Without differentiating between earned media or paid media, I wanted to see which vehicles or media outlets were considered most effective in publicizing the businesses or messages of the participants in the survey. I had intended to have the potential answers ranked from 12 to 1, with 12 being most effective and 1 being the least. That didn't happen. However, although my directions were misinterpreted by survey-takers, the results are still easy to interpret. You clearly can see which vehicles or outlets are considered as effective (and thus important) versus those that aren't.

- Daily Newspapers - 7
- National Magazines - 6
- Radio talk or news shows - 3
- Local cable TV - 6
- Online reporters/media/blogs - 2



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- Weekly newspapers - 6
 - Trade publications - 11
 - Paid TV advertising - 9
 - Paid radio advertising - 9
 - Paid newspaper advertising - 9
 - Other (Please list: _____) - 9
- (Please note, this is not the overall average, it is only the average of those who actually listed something in the blank provided. Of those who did, three answers tended to show up regularly, including Email, Direct Mail and Trade Shows.)*

When a follow-up question asked the survey-takers to gauge their effectiveness in communicating their message to their target audiences/customers, I was concerned to find that nearly half of the participants didn't express confidence in their ability to do so.

Of the 44 who answered this question, only 38 claimed to know. Here are the disappointing numbers:

- 3 Very effective, 18 Moderately effective, 17 Not effective, 6 Did not know

Survey-takers actually displayed more confidence when asked whether the INA currently targets the right audiences to achieve its mission and objectives in the most efficient and effective way possible.

Of the 48 who answered the question, 44 had an opinion:

- 3 Definitely, 29 Yes, but could do more, 6 Somewhat, 4 Not at all, 4 Do not know

This happened to be one of the sections of the survey which formally requested additional feedback if the participant's answer was anything less than "Definitely;" however, unlike nearly every other opportunity to do so, most participants simply did not take advantage of the opportunity to support their answers.

The only comments received were:

- Need to better target "horticultural" public;
- Emphasize the fun of the business as well as the professionalism;
- I think the INA should advertise in the gardening sections of major newspapers;
- INA should have a presence at trade shows of more potential users, like park districts, public works, builders and developers.

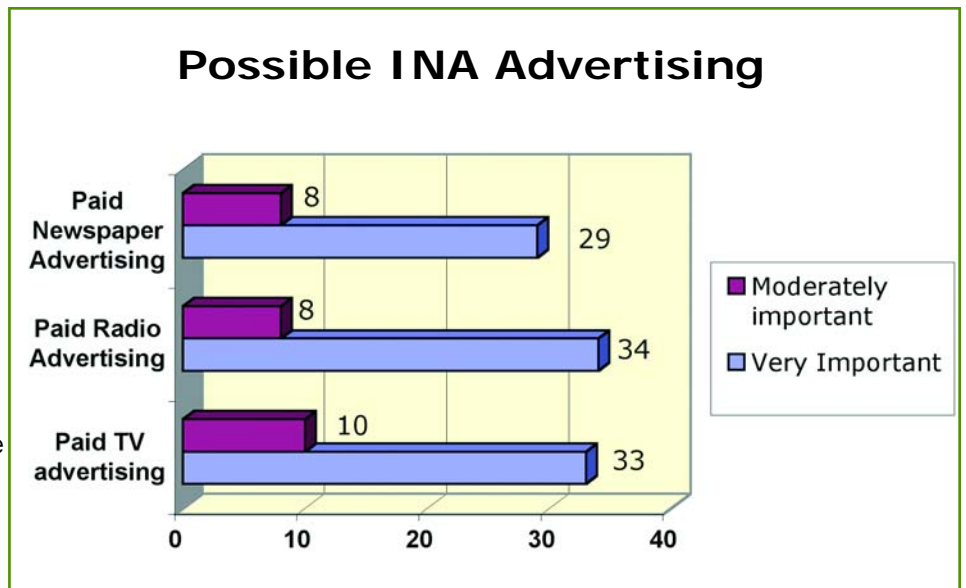
Respondents did take the time to identify which of the following audiences should be targeted by the INA's external outreach communications to help their businesses. In doing so, an obvious pattern developed with a central theme of "the more, the merrier," as it was nearly unanimous that the association should be targeting every one of the potential audiences listed, including:

- General Public - 49
- Other Trade Associations - 14
- Potential Members - 47
- Existing Customers/Clients - 46
- Media - 44
- Federal & State Regulators - 41
- Government Officials & Politicians - 41
- Lobbyists - 12
- High School Students - 44
- High School Teachers - 45
- College Students - 47
- College Professors - 49
- Universities & Hort Programs - 49

And, according to survey-takers, which tools currently employed by the INA are most important to reach their customers, and ultimately to assist their business?

Well, apparently respondents believe the INA – despite its access to a broader range of resources – should utilize many of the same tools they do within their own businesses. However, please keep in mind that nearly half of the participants expressed little confidence that their respective business was effective in using those tools. Does this mean they believe they are using the correct vehicles or tools to deliver their message, but just not using them properly? Or does this mean they think the INA would simply be more effective in utilizing those same vehicles or tools?

Of course, in this case, survey participants also had the opportunity to weigh in on the importance of the INA using various forms of paid advertising to reach their



customers and to assist their businesses. As may be expected, every form of paid advertising (TV, radio and newspaper) was viewed across the board as “Very Important”.

- Paid TV advertising – 33 Very Important, 10 Moderately Important
- Paid radio advertising – 34 Very Important, 8 Moderately Important
- Paid newspaper advertising – 29 Very Important, 8 Moderately Important

Other tools receiving high marks?

- Web Site – 23 Very Important, 19 Moderately Important
- Special Events – 27 Very Important, 14 Moderately Important
- Media Outreach – 16 Very Important, 24 Moderately Important
- Direct Mail – 21 Very Important, 23 Moderately Important
- Press Releases – 18 Very Important, 18 Moderately Important
- Flyers – 19 Very Important, 22 Moderately Important

When asked to rank the effectiveness of those vehicles or tools from 12 to 1, with 12 being the most effective and 1 being the least, respondents again failed to follow my imprecise directions as originally intended. Clearly, however, it is obvious that members regard some of the communications tools available to the INA much more highly than others.

- Daily Newspapers - 8
- National Magazines - 7
- Radio talk or news shows - 2
- TV news shows - 4
- Local cable TV - 8
- Online reporters/media/blogs - 2
- Weekly newspapers - 6
- Trade publications - 9
- Paid TV advertising - 11
- Paid radio advertising - 11
- Other (Please list: _____) – 9

(Please note, this is not the overall average, it is only the average of those who actually listed something in the blank provided. In every case but one of those who did, the tool they identified was “Web” or “Internet”.)

Respondents were clearly conflicted on whether the INA has a specific or consistent message that it incorporates into all of its’ communications. Of those who answered, 27 did so in the affirmative, 21 did so in the negative. However, of the 21 who said the INA did not, 7 added their own unsolicited notations indicating they have seen some improvement in this direction over the last year or so. In light of the previous answer, it could be viewed by some

that the INA received disproportionately high marks when survey-takers were asked to rate the effectiveness of the association’s external communication outreach programs.

7 Very effective, 23 Fairly effective, 9 Average, 10 Needs Improvement, 0 Not effective at all, 2 Do not know

The external communications section of the survey also afforded participants to answer some open questions that will help the association assess the confidence level of the industry and specifically identify prevalent concerns and long-term fears.

Are major shifts in the industry changing the business climate?

The economy and shrinking disposable income of consumers; Invasive species issues; How to integrate use of native species; Freight costs; Box stores here to stay; People want more for less; Customers getting older; Less time to garden; More time with hobbies, vacations and less free time; Younger homeowners not loyal to independents.

Are big retailers coming in to steal your market share?

Although nearly every participant answered this question “Yes,” the only comments tended to be of a positive nature, including: They are going to be our customers too; The advertising they do and can afford to run actually helps the industry as a whole; People get ideas from the big box stores, but come buy from us because they know we offer better quality; Customers can’t get specific questions answered by workers at big box stores, so they come to us to ask questions and then end up buying from us what they had intended to buy originally at the big box store.

The one consistent concern that did appear was that: Big box stores can price plant material and product for much less, making customers feel as if we are trying to cheat them.

Are mail order suppliers taking away your business?

We received mixed results to this question, some “Yes”, some “No”. Comments included: Mail order companies can’t compete because the plants are too small and have to be purchased sight-unseen; A homeowner will never install a landscape via mail order; We tend to have people bring in pictures and descriptions from catalogs to us to buy the material in person.

Are regulatory agencies making changes that have a huge impact on your livelihood?

We received many “Yes” answers, very few “No” answers, but quite a few blank ones. Comments included: Tree preservation ordinances have resulted in increased



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transplanting as part of the development process; H2B program; Visas being delayed; Higher interest rates that can slow down the construction industry; Road commissioners are on our trucks from nursery fields; Taxes on small businesses; Illinois keeps making it harder and harder on small businesses; If landscape architects are successful getting the legislative changes they are seeking, it will put us out of business; Illinois wants to balance its budget on backs of mom and pop businesses; Escalating taxes on fuel passed on to us. Business climate in Illinois, thanks to this Governor and legislature, is worse than it's ever been.

From your perspective, what on the horizon has the potential to harm your business?

The most common answer to this question was Immigration Reform, appearing on far more surveys than not, and on far more than any other concern or threat. Others included: Lack of good labor; Shrinking consumers' disposable income; Invasive species; Sale and annexation of adjacent land leaves us with unclear future and we hesitate to plant; Legislation specifying who is legally able to be called legislative designers; Generational shifts in buying habits 10 or 15 years from now; If a Wal-Mart were to move right across the street from me; Water bans; Economy; Weather.

What on the horizon could give your business a huge boost?

Sunshine; Low fixed interest rate on short-term loan; Better advertising to a targeted market; Tax savings to allow us to retain more profit to cut some start-up costs; Advancing technology in green industry; Great weather and economy at same time; Box stores are an untapped market; Generational shifts in buying habits 10 or 15 years from now; Good economy; Finding a way to get Generation X & Y interested in gardening; Co-sponsoring events like Crime Stoppers for our Parade of Ponds; Companies with reputations holding the hands of smaller companies.

Are the tactics of any members within the green industry hurting competition or giving industry a poor reputation?

Of course, this question elicited a collective sigh or groan, as well as a lot of criticism. Whether referred to as “fly by night” or “pickup truck and wheelbarrow operations”, it is clear that the professionals in the industry are concerned about the effect these types have on the industry’s credibility and reputation. Aside from the damage – whether physical or perception – that can be done by literally anyone with a shovel, another very valid concern raised by several is those who fail to honor warranties and guarantees.

On a weekly basis, what are the types of things you deal with that cause frustration or anguish?

We received some great answers here, some which obviously were provided purely for comedic relief and did induce a chuckle like “being a Cubs fan,” or “my husband;” others could be perceived as both humor and fact, like “Chicago traffic.” But there were plenty of legitimate frustrations identified as well, including: Production forecasting and availability issues; Multi-warehouse distribution; Lack of time; Limited resources; Economy; Having to buy advertising at higher levels in order to compete; Lack of professionalism in industry; People don’t know anything about the plants they are installing in a client’s yard; Wages & benefits for employees; Fact that industry is seasonal; Personnel problems; Finding educated & experienced employees; Lower quality Hort programs in our state, especially with regard to UofI; Revisions to plans or proposals; Late shopping; Customers’ lack of patience; Lack of fairness from the buying public; Customers becoming more aggressive and less accountable to a basic level of mutual fairness; Customers who want to price haggle; Wealthy clients who demand that their jobs are done NOW!; Workers calling in sick; Insurance costs; Fuel costs; The future; Property taxes; Meeting budget; Making budget with escalating costs; Customers expecting us to absorb all of the higher costs for things like fuel, and balking when we suggest sharing the burden.

Do your concerns tend to focus internally on your business, staff, labor, insurance, increasing costs, or instead outside of your business on competition, supplier challenges, customers, the economy?

Although quite a few respondents admitted to occasionally worrying about external issues or outside pressures, for the most part our participants almost unanimously indicated that internal concerns always top the agenda.

Last but not least, participants were asked for their recommendations on how to enhance or expand the association’s external communication outreach programs to help the industry, the person completing the survey, and their respective business. A whole host of quality comments were contributed, with key and consistent themes being:

- The more we can work or collaborate with other segments of the industry, the better off we will be. (“Better off” was defined as: more effective, viable, more productive and more profitable by different survey-takers.)
- Develop a comprehensive PR strategy backed by an actual budget that supports the process.

- Change the name of the association to dispel confusion and to clearly identify and promote who the INA is and who we represent. (Two participants further said: The name change should be the first item on the agenda of any PR/media strategy.)
- In our business, we don't think in terms of media, but business-to-business, website, catalog and faxed flyers.

- Use email lists for events, special bulletins. (One participant was adamant that the INA should "FORGET FAXES!")
- Get members to start referring customers to www.gardenillinois.com.
- Get word out to garden shows and news media about www.gardenillinois.com.



INTERNAL COMMUNICATIONS

The framework employed for questions regarding "internal communications" was intended to push members to actually consider and subsequently evaluate both the effectiveness and efficiency of communications from association staff and the Board of Directors to general membership and vice versa.

seem to know the association's mission, who are familiar with the INA's strategic plan or which methods of communication they view as most effective.

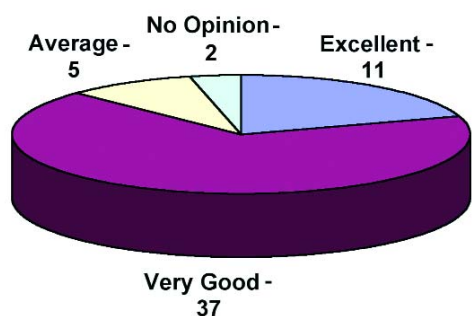
When asked if they knew what the INA's mission is, 37 of 53 said "yes," while 16 said "no." Only 30 of 51 said they could explain that mission to others, while 21 said they could not.

There were far less who seemed to know what the INA's strategic plan is, with 22 of 49 saying they were familiar with it, and 27 saying they were not. When asked how often they refer to the plan, only 3 of 48 said often, only 7 said every now and then, 25 said they read it once, and 13 said they had never read it. The answers to these two questions seem to conflict at least somewhat, as 27 respondents to the first question said they were not familiar with the plan, while only 13 said in the second question that they had never read it. To reconcile the difference between the two, do we assume that half the people who said they weren't familiar with the plan had read it (or maybe glanced at it) but had forgotten it, or do we assume that half the people who claimed to have read it once, really didn't read it at all, and were either afraid to admit that fact, or they instead only saw it or were made aware of it, but did not take the time to read it?

Despite the fact that so many admitted to not knowing the INA's mission or not being familiar with the association's strategic plan, we seemed to get an inordinate amount of

Thank You for Your Feedback

Communication Between Association and Members

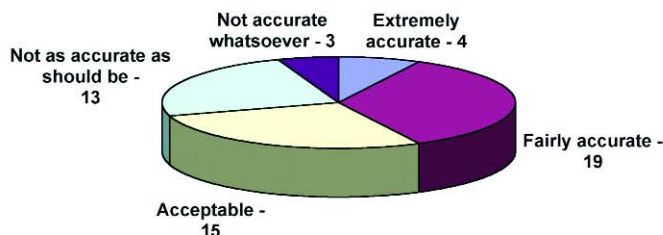


Overwhelmingly, respondents agree that the communication between the association and its' members is very good. Of the 55 who answered this question, 11 rated the communication as Excellent, 37 as Very Good, 5 as Average, 0 as either Below Average or Poor, and 2 had No Opinion.

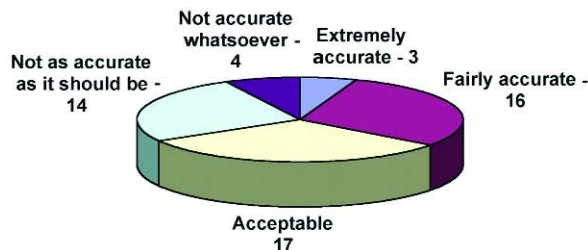
Although the answer to the previous question was lopsided, there was a much wider gap between members who

INA Mission Statement

How well does it reflect what the Association really does?



How well does it reflect what the Association should be doing?



feedback when we asked for their opinion on: One, whether the mission statement accurately reflects what the association really does; Two, whether the mission statement was consistent with what they believe the association should do; or Three, whether the strategic plan matched what they feel should be the association's role, function or priorities.

In your opinion, how well does the INA's mission statement reflect what the association really does?

- 54 total

- Extremely accurate - 4
- Fairly accurate - 19
- Acceptable - 15
- Not as accurate as it should be - 13
- Not accurate whatsoever - 3

What the survey-takers think the association should do? - 54 total

- Extremely accurate - 3
- Fairly accurate - 16
- Acceptable - 17
- Not as accurate as it should be - 14
- Not accurate whatsoever - 4

How well does the INA's strategic plan match what respondents feel should be the association's role, function or priorities? - 52 total

- Extremely accurate - 5
- Fairly accurate - 12
- Acceptable - 14
- Not as accurate as it should be - 12
- Not accurate whatsoever - 9

Is it possible that so many seem indecisive or unclear on the mission and strategic plan, because they're not sure themselves what the association should do, what it can do, or that bottom line, they would like for the association to do or provide everything?

Look at the pattern that develops when participants were asked to rank from 9-1 in order of importance, the following benefits of membership in the INA (with 9 being most important, 1 being least important). Again, this is one of those questions where my confusing directions didn't provide the ranking we had anticipated, but based on these results I am not sure that would have been possible anyway.

- Networking & Camaraderie - 9
- Regulatory & Government Affairs - 8
- Education & Training - 8
- Clearinghouse of Information - 7
- Legislative & Lobbying - 8
- Certification Programs - 7
- Professional Affiliation - 8
- Member Support Services - 7
- Other (Please list: _____) - 8

(Please note, this is not the overall average, it is only the average of those who actually listed something in the

blank provided. The answers provided were not verbatim, but all seemed to intend for their answer to mean the same thing - either "marketing or promoting the industry".)

Participants seemed to be very satisfied with the amount of contact they have with INA staff. When asked to rate their level of interaction with the association, 18 of 52 said it was Excellent, 24 said it was Very Good, 5 said Adequate, 3 said Needs to be more (interestingly, 2 of these 3 added notations indicating the burden was on them to improve the interaction, and not the INA, which had done more than enough), and 2 had no opinion.

Of the 51 who answered the question about the last time they had talked to the INA, 4 said they had talked to staff on the day they had completed their survey, 17 said they had that week, 27 indicated they had sometime that month, and 3 said it had been sometime in the last year. Not one respondent said they couldn't recall or that they had never talked to INA staff.

Here's what participants had to say when asked whether their interaction with association staff was by:

- Phone - 43
- Email - 34
- Committee meetings - 22
- Visits to the INA office - 21
- INA staff visiting their place of business - 33
- At trade shows or conferences - 41
- Volunteering (at State Fair, Chicago Flower & Garden Show, etc.) - 32

We also asked participants to rate the effectiveness of the various methods of communication employed by the association. For the most part, all appeared to be very effective; however, one method elicited some negative comments as well.

- Email - 52 total
11 - Most effective, 20 - Very effective, 10 - Acceptable, 2 - Not very good, 9 - Does not apply
(This question elicited several remarks about how this method should be used more by INA staff, as it's the most effective, but under-utilized.)
- Growing Trends Magazine - 52 total
15 - Most effective, 22 - Very effective, 11 - Acceptable, 2 - Not very good, 2 - Does not apply
(This question drew numerous comments about how recent improvements to the magazine now make this a very effective method of communication, which had not always been the case.)
- INA website - 51 total
24 - Most effective, 23 - Very effective, 1 - Acceptable, 0 - Not very good, 3 - Does not apply
- Direct mail - 49 total
7 - Most effective, 12 - Very effective, 21 - Acceptable, 9 - Not very good, 0 - Does not apply
(Several comments indicated that direct mail from the INA is often added to the growing stack on the desk, which may or may not be seen in a timely fashion.)

- Faxes – 52 total
11- Most effective, 8 - Very effective, 11 - Acceptable, 17 - Not very good, 5- Does not apply
(This is the question that elicited the most emotional, even raucous comments about how respondents feel inundated by faxes from the association. One participant said, “Stop faxes now!” Another said, “I never want to get another fax.” Several participants said, “You should be utilizing email now, no need for faxes.” One survey-taker went a little further when they said, “I dislike these lengthy faxes so much that I already have a negative opinion of and usually a negative reaction to what’s included in the fax before I even get the time to read it.”)
- Other (Please list: _____) – 17 total (all of which listed “Phone”)
12 - Most effective, 5 - Very effective, Acceptable, Not very good, Does not apply
(Several made notations to say that, “if you want to get something to me right away or if you need an immediate answer, you’ve got to pick up the phone and call me.” Several also added, “You obviously already know that, because that’s what you do. Keep doing it.”)

generally the current issue or the one from the month immediately preceding. Additional comments confirmed what we have always claimed, that each issue of *Growing Trends* is passed around their place of business and shared by many, with anywhere from 5-20 additional people seeing each issue that’s sent to a particular addressee.



As for the websites, most participants indicated they had visited the INA website (www.ina-online.org) either “Today” or “This week”. A few said it had been “This month”, while practically no one said it had been “In the last year”, “Never” or that they couldn’t recall.

When asked how often they refer a customer or client to the INA’s consumer website (www.gardenillinois.com), answers were a bit more tempered with only 4 saying they do it all the time, 20 saying when they have specific questions, 23 more saying they do it every now and then. The good news was that only 1 said never and only 1 said they didn’t know it existed.

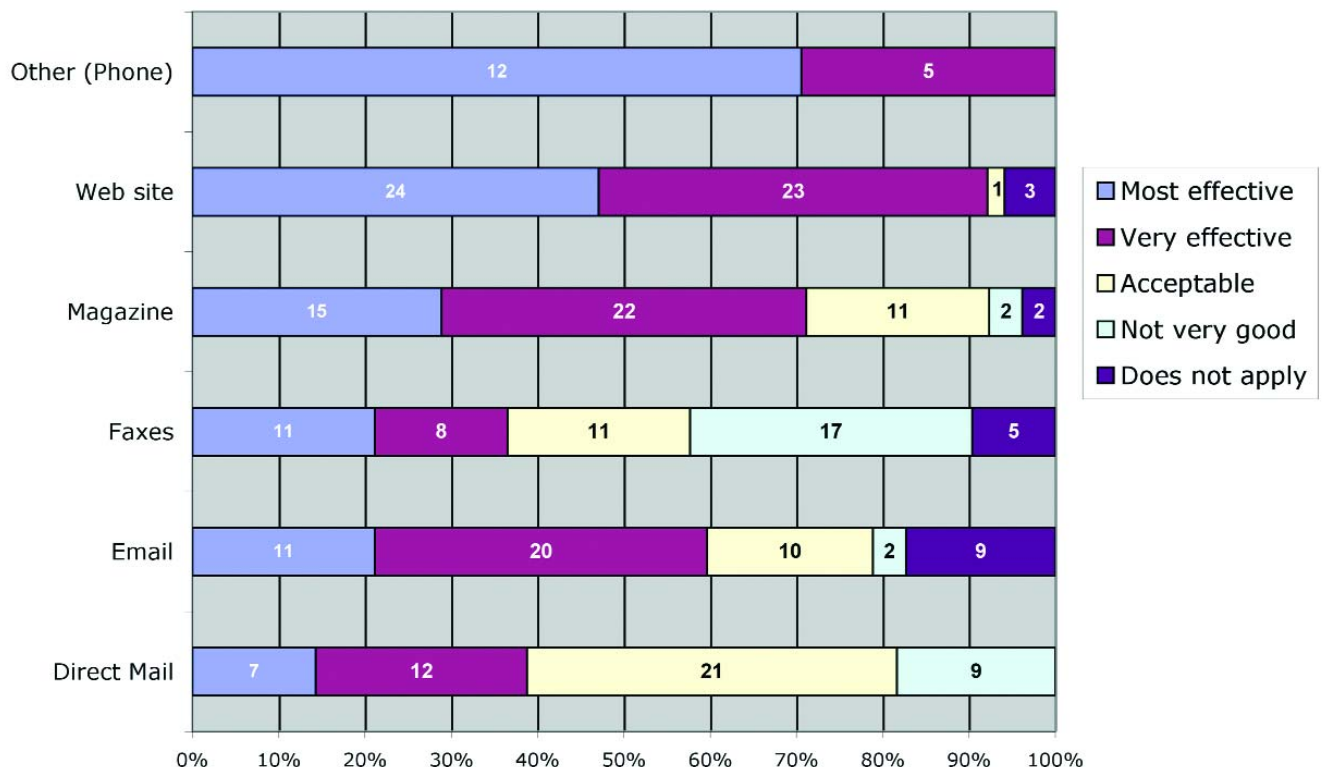
When asked if the company’s website was linked to the INA’s consumer website (www.gardenillinois.com), 16 of 49 said “Yes!”, 28 of 49 said “No, but it should be”, 0 said “No, not interested”, and 5 said they had “no idea”.

If the numbers collected via this survey are fairly reflective of the larger membership, the most disappointing thing we may have learned is that current members don’t seem to refer potential new members to the INA. This is not only

We asked for some additional feedback regarding *Growing Trends* magazine and also the websites, as we’ve spent considerable time recently enhancing each. Our efforts appear to be working. In addition to the numbers below, many unsolicited comments regarding these important tools of communication had high praise for recent improvements and efforts to upgrade the magazine and websites.

Most respondents indicated they had picked up a copy of *Growing Trends* either this month or last month; they said they read *Growing Trends* every month; and they said it was

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disheartening, but some what tragic as there are no better ambassadors for the association than its members. Study after study confirms that “word-of-mouth” is the most effective recruitment tool, the most powerful endorsement and the most credible and lasting referral.

However, only 3 of 48 participants indicated they had referred a new member to the association in the last week, 1 actually had the very day they completed their survey, 14 had in the last month and 12 had in the last year. Unfortunately, that left 18 of 48 who couldn't recall or who never had. This is a number we have to turn around if we hope to ensure the future viability of our association.

Conclusion

Although this survey recorded the results of what may seem a small number of members, participation did in fact come from a significant percentage (13 percent) of total membership. Generally, surveys hope to draw a participation rate of 5-10 percent with anything over 10 being considered excellent. Most important, the participants represented a wide-range of business types and positions or employment within those businesses, as well as various segments of the green industry and good geographical diversity, all of the demographics in which you hope to see some variety. At this time, this serves as the best snapshot of the industry in Illinois that we have had to date.

Furthermore, those who took the time to complete the survey provided thoughtful feedback and invaluable insight. Results were consistently mixed, with few if any surveys being 100 percent positive or 100 percent negative. Most comments, whether formally requested or unsolicited, (and aside from the occasional attempt to inject humor or a rare inflammatory remark) were constructive and productive, and gave better depth to this snapshot in time.

Finally, although not scientific, I am extremely confident that the numbers we now have on hand gave legitimate, credible, measurable values to all of those factors we must consider as we forge ahead with development of a comprehensive strategic communications plan and coordinated marketing strategy for the association.

Last but not least, we received a few recommendations on how to enhance or expand the association's communication with its members. Among them:

- “Have seen a huge improvement as of late;”
- “You're doing a great job already, especially over the last year;”
- “Keep building the website;”
- “More members need to attend the annual and semi-annual meetings;”
- “Add Spanish contact or liaison to exploit potential growth area;” and
- “The hiring of Joe Khayyat is a great move. He is a natural communicator and the effect of his presence is already evident.”

This is a critical period for the Illinois Nurserymen's Association as the organization is at a crossroads of sorts. The association has done a remarkable job over the last five years of strengthening its base and nurturing its core. Then, by meeting the goals and objectives of the INA's last long-range plan in only half the time projected – in only 1 ½ years rather than 3 – the association further positioned itself as a leader in the industry. However, any new strategic plan now must consider and define what the INA's role and responsibility is to be in enhancing and ensuring the future viability of the green industry in Illinois. Thanks to those who participated in this survey, future plans for those all-important communications strategies and programs – including the financial support necessary to develop and implement those efforts – can be considered, debated and determined with real results as guidance.

