



Horticulture Australia



Final Report
HAL Project: NY11004
Completion Date: 31 August 2014

Nursery Industry Market Data
2011-2014

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Final Report

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~ Disclaimer ~

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MEDIA SUMMARY

Following the conclusion of the industry's Market Monitor, NY11004 Industry Market Data was born out of a critical need to capture timely and accurate data for analysis on the Australian nursery and garden industry.

An Industry Reference Group spent a number of months planning and mapping the industry for data capture and determining what was the best method and frequency to ensure the collection was credible, timely and accurate.

A monthly data capture system conducted by a third party was decided. It provided free to each contributor an annual report of both their position within the market and the state of play for the Industry. It was widely promoted and awareness was high but adoption of the program by industry was not with the monthly data collection failing to launch.

In the absence of the monthly collection and still with the need to capture data, negotiations between the third party researcher GfK ensured NGIA could utilise all the mapping and a modified methodology to conduct a 'snap shot' survey of the industry.

The anonymous survey was conducted online and sufficient organisations contributed for the Industry to capture some usable information. The results of the survey were circulated to the contributors who requested the data and the industry has captured some basic but usable figures and trending data.

It remains, that across all three data collection sectors, being greenlife producers, allied trade and growing media that education is required to encourage participation in market analysis projects such as this. The benefits to a business in possession of this information are great but require further communication. Additionally, an Industry in possession of this data would be stronger and more influential.

TECHNICAL SUMMARY

Following the conclusion of the industry's Market Monitor, NY11004 Industry Market Data was born out of a critical need to capture timely and accurate data for analysis on the Australian nursery and garden industry.

An Industry Reference Group spent a number of months planning and mapping the industry for data capture and determining what was the best method and frequency for capturing data to ensure the collection was credible, timely and accurate.

A monthly data capture system conducted by a third party researcher was decided and so the process of determining the methodology began.

In formulating the methodology and having regard for past projects the following was considered by the reference group.

- How to manage industry expectations for the research.
- How to balance organisational capability to supply data with the need for the research to deliver useful information.
- Ensuring submission forms are easy to follow and use.
- Ensuring the report packages provide useful information that is easy to interpret.
- Balancing transparency of contributors with confidentiality and the credibility of statistics.
- Undertaking measures to ensure the research had sufficient contributors to provide meaningful reports across product categories, states and nationally.
- Establishing rules around data reporting and access guidelines for industry data.

The following elements have been finalised.

Identifying industry target list	To ensure data credibility
Product Group Identification	Due to the volume of participants required, it was necessary to establish group for an easy data collection and flexible reporting
Supply Chain Maps	The industry supply chain was mapped. Data capture points were identified to avoid double counting of product and ensure relevant data capture.
Formulation of data input sheets	Product categories and distribution channels were identified and refined. This information was then collated in an easy to use input sheet for greenlife production, allied suppliers and growing media suppliers
Report Formats	Developing reports, identifying access and different levels including a structure with a free report to contributors.

It was widely promoted and awareness was high but adoption of the program by industry was not with the monthly data collection failing to launch.

In the absence of the monthly collection and still with the need to capture data, negotiations between the third party researcher GfK ensured NGIA could utilise all the mapping and a modified methodology to conduct a 'snap shot' survey of the industry.

The anonymous online survey was conducted by GfK Informark and sufficient organisations contributed for the Industry to capture some usable information including:

1. Business type
2. Postcode
3. Total area under production for the financial years 11, 12, 13 (if available)
4. Turnover for the financial years 11, 12, 13 (if available)
5. FTE staff for the financial years 11, 12, 13 (if available)

The results of the survey were circulated to the contributors who requested the data and the industry has captured some basic but usable figures and trending data.

It remains, that across all three data collection sectors, being greenlife producers, allied trade and growing media that education is required to encourage participation in market analysis projects such as this. The benefits to a business in possession of this information are great but require further communication. Additionally, an Industry in possession of more detailed data would be stronger and more influential.

INTRODUCTION

Following the conclusion of the industry's Market Monitor, NY11004 Industry Market Data was born out of a critical need to capture timely and accurate data for analysis on the Australian nursery and garden industry.

The need was identified after an assessment found a broad range of accessible data on the industry proved to be lacking in accuracy, frequency, integrity.

To assess contraction or growth of industry, understand employment figures and size (Ha) of production, the industry considers results from ABS & ABARES censuses and surveys including the reports released and also through ABS's Table Builder facility. Additionally, NGIA accesses other agency data including:

- The **Levies Revenue Service (LRS)** collect the nursery products levy on behalf of industry and where it is invested and managed by HAL. The levy is currently set at 5% of the wholesale value of the container. As an industry the levy receipts provide basic trending data. The limitations of this data are that levy payers are not identifiable and the type of container is unknown. Both these details would enhance this information as it would give an insight into the market share of operators and where in the value chain the intended product sits.
- The **Australia Tax Office (ATO)** taxation statistics. The ATO uses the same ANZIC classification as the ABS. There is often a delay in the release of these figures. For example, in February 2014 the most recent figures available were for the financial year 2010-2011.
- Queensland Lifestyle Horticulture Industry Survey report of July 2011. This was conducted by the **QLD Department of Employment, Economic Development & Innovation**. To our knowledge this is the most intensive State agency survey conducted and was relevant to QLD only.

Of concern is the variation in the figures that are reported and how relevant businesses are captured. This is despite giving consideration to the variation from different financial years and guidelines within which the reports are published such as definitions, exclusions and inclusions.

Allowing for a margin of error between these sources, they often report results with significant differences. As a result of this, the nursery industry commissioned our own research project to establish a credibly sourced picture of the industry.

NY11004 Industry Market Data was an ambitious project to engage an independent market research company, to embark on a journey to collect accurate industry market statistics.

This project sought the support of all industry greenlife producers, allied traders and growing media suppliers in the collection of monthly industry statistics. With input into the project extending to producers and suppliers to primary industry, forestry and more, the project was the largest of its kind seen by the nursery industry.

The sole purpose of this project was to provide industry operators and industry bodies with useful, timely information about the nursery industry market.

For participating businesses, the original strategy would have opened the door on markets across different segments and distribution channels, nationally and by state. They would have had the ability to track trends against historical data and use this information to enhance operations.

Importantly, the combined information of all contributors would have delivered a powerful advocating opportunity for nursery industry association bodies and key stakeholders. With this kind information industry representatives would have been able to analyse and harness the data for the benefit of all industry operators. For example to measure the benefits of the current industry campaign 2020Vision on production growers.

As has been indicated in previous milestones, the challenges to engaging the industry in the original data collection process were mountainous and ultimately unattainable. Unfortunately, the original format identified did not secure the required participant numbers for a credible collection.

However, all was not lost with intensive formulation of this data collection project resulting in some fantastic supply chain mapping, categorisation and summary report formats for participants and information that will be utilised in in different industry arenas including liaison with statistical houses in an effort to improve the collections currently available.

Attention turned to approaching the ABS to undertake compulsory surveying on behalf of the industry. NGIA acknowledged there would be limitations to this data but accepted that there were and continue to be, few choices remaining. Quotes for this work to took six months to receive from first request and on receipt the fee for service was extreme and financially unachievable for industry.

Nevertheless, with the flexibility of the third party researcher, and after comprehensive consultation with the industry leadership groups and Horticulture Australia, we were able to modify the project to enable capture of data to using a 'snap shot' survey method. The nursery industry has achieved an anonymous 'point in time' data collection for the financial years of 2011, 2012 and 2013.

MATERIALS AND METHODS

Research Strategy - monthly supply

In an immediate attempt to instil confidence in the industry a Reference Group was appointed in early November 2011 to:

- Be a source of information for each sector to the consultant/researcher.
- Provide input into market definitions, structure of the reports, identifying/overcoming challenges to participation etc.
- Participate in review meetings and provide recommendations on the data and reporting structure to the consultant/researcher.
- To champion the research and undertaken encouragement and education of their industry sector to participate as a contributor to the project.

A tender process was then conducted to appoint an independent research consultant and this resulted in the appointment of GfK Informark by February 2012.

The first reference group meeting attended also by NGIA program managers and GfK Informark was held in April 2012 with additional meetings in August 2012 to finalise the research methodology.

In formulating the methodology and having regard for past projects the following was considered by the reference group.

- How to manage industry expectations for the research.
- How to balance organisational capability to supply data with the need for the research to deliver useful information.
- Ensuring submission forms are easy to follow and use.
- Ensuring the report packages provide useful information that is easy to interpret.
- Balancing transparency of contributors with confidentiality and the credibility of statistics.
- Undertaking measures to ensure the research had sufficient contributors to provide meaningful reports across product categories, states and nationally.
- Establishing rules around data reporting and access guidelines for industry data.

Appendix A contains the final supply chain mapping which directed the methodology for data collection.

Having regard for the above, GfK and NGIA commenced a process of refining the information and seeking input from industry and state bodies. As a result, target lists for participants were identified and classed into product groups; supply chain maps were finalised; data input sheets (See Appendix B) were prepared during which time product categories and definitions were refined and; sample report packages (See Appendix C) were prepared.

Following these project finalisations contracts between NGIA and GfK Informark took some negotiation. Having been made aware of feedback from the industry, NGIA negotiated with GfK a structure that would provide one free report to the contributing businesses each year of the

reporting project. The various fee structures were reviewed and approval processes were sought via NGIA Board and the IAC.

Following an intensive campaign to attract contributors to the program without success, the project was put on hold at the IAC Meeting in February 2013 to enable consultation of the various leadership groups and stakeholders in the project. This meeting also called for NGIA to look for alternatives to data collection including requesting we engage with more vigour, the option of accessing ABS data.

In April 2013 the Industry Consultation Meeting proposed that the project revisit the option of a 'snap shot' survey. This meeting was attended by the NGIA Board, State Presidents and CEO's.

In the same month, the concept of a 'snap shot' survey was raised with GfK Informark for their consideration of how it might work. Gerard Sweeney, General Manager of Informark presented some ideas and NGIA provided input on this approach. Importantly, Informark agreed that work on a snap shot survey would be incorporated under the current contract with Informark.

In May 2013 the alternative option for a 'snap short' survey was agreed by the IAC Meeting and these recommend changes were discussed the Horticulture Australia on 4 July 2013 and it was the changes to convert to a 'snap shot' survey were agreed.

Research Strategy - 'Snap Shot' Survey

Using the information and mapping and categorisation ground work from the original format, an online survey was designed and managed by independent third party GfK Informark.

Contributors who signed up to the original program were advised of the change in format by email mid-September 2013.

A participation (incentive) letter was then mailed early October to approximately 2000 people on the NGIA database. The letter was drafted with a tone and specific information designed to drive participation in the survey. This letter also formed a notice for State & Territory Associations to use in their publications.

GfK Informark then forwarded an email on 16 October which attached the link to the survey. The survey sought the following information:

- Business type (check box: options will be defined)
- Postcode
- Total area under production for the financial years 11, 12, 13 (if available)
- Turnover for the financial years 11, 12, 13 (if available)
- FTE staff for the financial years 11, 12, 13 (if available)

Participants then submitted their responses. They also had the option to request a summary report be emailed to them and were also able to print their own responses. The survey was scheduled to be open for 4 weeks however, we continued the survey for 6 weeks during which time weekly reminders were sent to businesses who hadn't responded.

A copy of the online survey format is attached at Appendix D.

Australian Bureau of Statistics- Further investigations

In November 2012, NGIA commenced researching the ABS systems, formats and structure in an effort to understand why the ABS's figures were significantly different to the Australian nursery industry's assumptions of its market position. This led to a number of concerns being identified.

NGIA commenced discussions with ABS to raise our concerns but also to put raise the profile of the nursery industry and horticulture in the eyes of the Director of the Rural, Environmental and Agricultural Statistics Brach (REASB).

Under instruction from the IAC in February 2013, NGIA continued discussions with ABS regarding user funded surveying of industry.

NGIA was invited to participate in the REAS Forum held 7 March 2013 in the ABS Canberra offices. At the conclusion of this meeting Katie Hutt, the Director of REASB provided an *verbal indicative cost for a user funded survey of close to one million dollars*.

Liaison continued with the ABS to work to review the various methods for NGIA to access data on the nursery industry including a request for ABS to provide to NGIA the user funded survey format and results from the 1997. In a discussion on 15 April 2013, ABS verbally wrapped up assistance for NGIA indicating that ABS have 'pretty much exhausted the investigations for Nursery' and that 'they need to draw a line under the work they have done'.

This was of course disappointing however, NGIA continued to submit specific questions into the survey review process which were declined and we continued to follow up the survey and results from 1997. Finally, this was received in August 2013 (5 months after it was requested).

At this point NGIA requested two quotes from ABS for user funded surveys. The first quote was to be an exact replica of the 1997 survey and second quote was a variation on the 1997. After continue follow up, these quotes were received in February 2014 for the amounts of \$1,012,054 and \$825,669 respectively (6 months after it was requested). See Appendix E.

RESULTS AND DISCUSSION

Despite the intensive activities to engage businesses in the original strategy of monthly data supply, only 40 businesses signed up.

The Industry Reference Group for the project had identified 300 different businesses across the greenlife production, growing media and allied product sectors. Those target businesses were broken down by sector and then State and were called 'product groups'. This would have allowed individual product groups to be launched without need to wait for the full 300 to participate.

The '300' target list represented a 'best informed guess' of which businesses would capture approximately 80% of each of the market sectors.

In accordance with the Industry Reference Groups aims that supported only the release of credible data and to protect the confidentiality of the contributors, not one product group was launched.

Product Group	Contract Target	NGIA Target	Confirmed	Tentative	Unknown	No
Greenlife NSW/ACT	82	88	12	5	70	1
Greenlife VIC	53	56	8	7	38	3
Greenlife QLD	40	42	6	3	30	3
Greenlife WA	18	19	1	1	14	3
Greenlife SA	52	52	4	1	47	0
Greenlife TAS	13	14	1	1	8	4
Greenlife NT	10	11	2	1	7	1
Allied Garden Product	17	20	3	7	10	0
Growing Media	23	23	3	5	12	3

Table 1: Status of monthly data contributors as at November 2012.

Anecdotal feedback from State & Territory Associations and industry stakeholders indicated that awareness levels of the research project to high. Despite this, the following reasons were identified for non-participation:

- Not collecting the data in order to submit it to the project
- Submitting monthly data felt too onerous and a big time investment
- Fear of data sharing
- Fear of how data would be used short and long term
- Not a priority for the business
- Wanted more than one free report a year
- Didn't see the importance for industry
- Didn't see the benefits for their business.

Interestingly, the commentary provided by the ABS for the results of the 1997 user funded survey found the following:

“Reliability of data:

Overall, respondents had significant problems providing the majority of dissections requested on the form. The quality of the report data for questions requiring detailed splits is uncertain as it appears from the comments received and respondents pattern of response that many were only able to provide 'rough' estimates. Nurseries, especially small, hobby and part-time nurseries did not have this sort of detailed information. Many respondents commented that they would need to go back and examine original documentation which would be incredibly time consuming.

This indicates that in 17 years of industry working to capture accurate market information on the industry, the position of industry stakeholders has not shifted. This is a deep concern for industry. It will ultimately force reliance on systems that do not specifically consider the necessary data requirements of the greenlife market.

Implementing the 'snap shot' survey meant compromising on a number of vital elements of the monthly data collection. These compromises were to ensure we maximised the output from the survey and included:

- Survey was anonymous – except where businesses requested a summary report. In this case, NGIA was not aware of the business name and GfK only used the data supplied to provide the summary report requested. What this meant for NGIA was not knowing who participated meant not know likely size of the market captured.
- Postcodes would allow us to view data by regional area – except where the data would identify a business in which case it would not be provided in that region. This occurred too often and so it is impossible to use the postcode data without uncovering the data supplier.

On the positive side:

- Requesting data across three years provided trending data and generally speaking the results show an increase in production area, turnover and full time equivalent employees.
- As the survey would be going to the entire person database on NGIA's system, this would mean that retailers would also be sent the survey. Rather than exclude them, we included them to see the preparedness and detail they would give. The results of this information is not usable, however the system is now established to include them.
- The online system only allowed one submission from each IP address which would mean that we avoid counting businesses twice. If a national company submitting in every state required additional entries the links would be sent separately on request.

The results of the 'snap shot' survey are attached at Appendix F. A brief outline of the response result is below:

- Over 300 businesses responded to the survey of which 290 of them had legitimate responses.
- Based on the email circulation of survey links this represented a response rate of 18%.
- In the original project 300 businesses were identified by the various stakeholders as statistically relevant. 92 of these businesses participated in the survey. As the results are anonymous, this has been determined only by email addresses and the information is not available to NGIA for confidentially purposes. This represents approximately 32% of those businesses deemed statistically relevant.

The ABS report *75030DO001_201213 Value of Agricultural Commodities Produced, Australia, 2012-13* and *7121.0 - Agricultural Commodities, Australia, 2012-2013* both released in May 2014 has captured data to June 30, 2013 which corresponds to the survey. A brief consideration of their data compared to the survey results shows the following:

Comparison of figures from ABS and NGIA for greenlife production only

	ABS	NGIA 2013 Survey
Number of businesses	2711 [^]	196
Nursery Production Turnover (\$m)	663.04 [*]	311.8
Production area (Ha)	16290 [#]	816
Full time equivalent employees	3464 ^{^^}	2298

[^] 7121.0 - Agricultural Commodities, Australia, 2012-2013 (nursery undercover & nursery outdoor)

^{*}75030DO001_201213 Value of Agricultural Commodities Produced, Australia, 2012-13 (nursery undercover & nursery outdoor)

[#] 7121.0 - Agricultural Commodities, Australia, 2012-2013 (nursery undercover & nursery outdoor)

^{^^} 2011 Census (nursery undercover & nursery outdoor)

A couple of interesting comparisons which prove the Australian nursery and garden industry's need to continue to work towards capturing accurate industry data include:

1. The turnover of approximately 200 nursery production businesses equate to 47% (almost half) of the turnover ABS reports as the turnover attributed to 2711 businesses.
2. Again, the employment of 2298 staff is attributed to 196 businesses in the NGIA survey whereas the ABS census data for 2011 indicates 3464 across 1794¹.

Incidentally, it's worth noting the count for businesses reported by ABS year ending 12/13 year indicates an increase of +900 businesses from year ending 11/12.

The results of online survey were emailed in April 2014 to every contributor who requested a copy.

¹ 71210DO002_201112 Agricultural Commodities, Australia, 2011-12 which is the report for the same time series as the Census.

TECHNOLOGY TRANSFER

The market data project is critical for industry. As such a number of activities took place to educate the industry on the need for data and to encourage their participation in the collection project. These included:

- Expression of Interest – designed to alert targeted businesses to the impending research project and to gauge the interest the target group.
- NGIA Website – market research pages - the NGIA website hosted all the information available on the research and provides resources for contributors, those interested in contributing, and those unable to contribute. It provided sample reporting, sample input sheets and the final supply maps.
- Advertising - an advertisement was developed for use by State and Territory organisations to promote and support the research.
- Media Releases – announced the research and promoted the benefits and coverage received. See Appendix G
- Presentations were made to industry. See Appendix G
- Information booklet: Your guide to the new market research program for the nursery and garden industry (see Appendix H), was printed and enclosed with an invitation to the target group to participate. The invitation included:
 - Co-signed letter from the State President and NGIA CEO Robert Prince.
 - Information Booklet: Your guide to the new market research program for the nursery and garden industry
 - Contributor Agreement
 - Report Request Form
 - Reply paid envelope.
- Call backs by NGIA regarding the invitation commenced in the first week of November 2012.
- The second round of participation invitations were circulated on 5 December 2012. This was an HTML that directed readers to the NGIA website where they were able to download a Contributor Agreement.
- HTML to major retail buyers – sought support from the major buyers to encourage their customers to participate in the research.

While awareness was high the project did not proceed in a monthly data collection structure.

The communication activities continued for the snap shot survey and the preliminary results of the survey were outlined at the NGIA Conference.

The results required further cleansing and once completed the results of the survey were made available to all contributors in April 2014. Further communication of the results is referred to in the recommendations below.

RECOMMENDATIONS

It is apparent given the comparison of recent ABS data and results from the snap shot survey that the industry should continue to work to capture data in some form.

It is recommended that an Analyst be appointed to undertake an in depth analysis of all the data available to the Nursery & Garden Industry in order to ascertain with some credibility the state of play industry in a timely manner. Potential sources for this analyst could include:

- NGIA survey data
- Levies & Revenue Service receipt
- Pot sales data including pot size
- Controlled release fertiliser sales from the major allied traders
- Growing media sales from the major media suppliers

It is also recommend that a second survey be conducted for the year ending 14, 15 and 16 with a view to making a comparison with the businesses who participated in the original survey and to engaging additional contributors through communication and education.

It is also recommended that NGIA continue to educate the industry in the need for the data. With awareness being high, energy should be directed to conversion of businesses. If this is the case then, a basic data collection format would need to be established to ensure converted businesses are immediately engaged.

The concerns of Industry prompted active participation with the ABS, specifically the Rural Environmental Agricultural Statistics Branch (REASB). This liaison has ensured NGIA has been involved in a number of their activities including an opportunity to submit questions for the agricultural surveying (which were declined, but allowed our involvement nonetheless).

Additionally, the release of the Farming Institute's report into Australian Agricultural Statistics prompted a review by REASB into its data collection methods. The relationship with ABS ensured NGIA was aware of the review. NGIA made two submissions and participated in a forum for the review enabling the Industry to highlight our concerns over the ABS data collection and reporting structures. See Appendix I and J for these submissions. It is recommended that the Industry this liaison with a view to influencing the surveying and collection structures.

Finally, given the financially unachievable nature of the quotes for user-funded surveys provided by the ABS, it is recommended that HAL lead a joint horticulture user funding survey that ensures greenlife production is captured appropriately.

APPENDICES

The following appendices relate to the outcomes of the project:

- A. Supply Chain Maps
- B. Data Input Sheets
- C. Sample Report
- D. Online 'Snap Shot' Survey format
- E. Quotes from ABS for user funded surveys
- F. 'Snap Shot' Survey Results Report
- G. Media received during promotion and presentations conducted.
- H. Information Booklet
- I. National Agricultural Statistic Review Submission
- J. Response to Preliminary Findings of the NASR

APPENDIX G

Confirmed Media

April 2012 Australian Horticulture Magazine Lack of monitoring highlighted
June 2012 NGISA Nursery Notes Market Research
June 2012 Your Levy @ Work New nursery industry market research project offers great value and huge potential to industry operators
July 2012 Hort Journal Research project to benefit industry
July 2012 Groundswell New nursery industry market research project offers great value and huge potential to industry operators
July 2012 Nursery & Garden News (NSW&ACT) How big is our industry?
Aug 2012 NGISA Nursery Notes New nursery industry market research
Aug 2012 Outdoor Design Source (Enews) NGIA Market Research Project
Aug 2012 Greenworld Are we being taken for granted?
Aug 2012 Greenworld New nursery industry market research project offers great value and huge potential to industry operators
Sep 2012 Greenworld Industry Market Research Project
Oct 2012 Leaflet (QLD) New Nursery Industry Market Research Project offers a free report on your business performance
Oct 2012 Nursery & Garden News (NSW&ACT)
Mention: David Foster, CEO editorial
Oct 2012 Nursery Notes (NT) Businesses targeted for new industry market research
Nov 2012 Enews (WA) Industry Market Research Program
Nov 2012 NGISA Nursery Notes Businesses targeted for new industry market research
Nov 2012 Leaflet (QLD) Businesses targeted for new industry market research
Nov 2012 Your Levy @ Work Businesses targeted for new industry market research
Nov 2012 Outdoor Design Source (Enews) Has your business been targeted?
Dec 2012 Your Levy @ Work Confidentiality a priority for industry market research
Dec 2012 Outdoor Design Source (Enews) Industry market research project
Dec 2012 Enews (WA) Confidentiality a priority for industry market research
Jan 2013 Nursery & Garden News (NSW&ACT) Confidentiality a priority for industry market research

Presentations tailored specifically for each State were made on the following occasions:

3 July 2012 – VIC Briefing Session – Trade Day, Caribbean Gardens, VIC
12 July 2012 – QLD Briefing Session postponed
17 July 2012 – VIC Tree & Shrub Growers Meeting Presentation – Kingston Golf Club, VIC
18 July 2012 – SA Briefing Session postponed
24/25 July 2012 – QLD attendance at Green Expo – discussing project with all exhibitors
28 August 2012 – NSW Breakfast presentation –Dural Country Club, NSW