**TURFGRASS ECONOMIC SURVEY – 2018**

**Service Provider Version**

OMB No. 0535-NEW

Approval Expires: X/XX/20XX

Project Code: XXX

SurveyID:

**United States**



**Department of Agriculture**

**NATIONAL**

**AGRICULTURAL**

**STATISTICS**

**SERVICE**



**USDA/NASS**

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**INSTRUCTIONS**:

· Report for **all** land operated, including land rented from others, in New Jersey.

· Report for all seasons (winter, spring, summer, and fall) during 2018.

# A. Company information

1. Where is your company located?

Primary County: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ List any additional counties: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

1. How long has your company been in business? \_\_\_\_\_\_\_\_\_\_ years

1. Are you a member of any of the following professional organizations?

Irrigation Association of New Jersey  Yes  No

New Jersey Landscape Contractors Association  Yes  No

New Jersey Nursery and Landscape Association  Yes  No

New Jersey Turfgrass Association  Yes  No

1. What was the approximate total area that your company serviced in 2018?

Total area: \_\_\_\_\_\_\_\_\_\_ acres Turf area: \_\_\_\_\_\_\_\_\_\_ acres

1. What was the approximate total irrigated area that your company serviced in 2018?

Total area: \_\_\_\_\_\_\_\_\_\_ acres

1. Did your company experience growth in 2018 with respect to the previous year?

 Yes  No

1. How much new turf area was established during 2018 by this firm?

Turf area: \_\_\_\_\_\_\_\_\_\_ acres

1. What percentage of the new turf area was established under the following methods:

seeding \_\_\_\_\_ % sodding \_\_\_\_\_ %

1. What proportion of customers renewed their contracts for your services in 2018?\_\_\_\_\_\_\_%

1. What type of services does your company provide? (Select all that apply).

 Landscape design  Fertilizer application  Mowing

 New planting (ornamental) liquid\_\_\_\_\_% dry\_\_\_\_\_%  Irrigation

 Pruning  Initial laying of grasses:  Aeration

 Herbicide application  Integrated Pest Management  Natural/organic control

 Insecticide application  Training  Biological control

 Fungicide application  Correct drainage  Soil testing

 Soil amendments  Top-dressing  Dethatching

 Edging  Clipping removal  Overseeding

 Turf selection  Snow plowing  Other (specify)\_\_\_\_\_\_\_\_\_\_\_\_\_\_

# B. Turfgrass Specific

1. Please indicate the percentage of each type of turfgrass among your clients? (Select all that apply)

\_\_\_\_ % Kentucky Bluegrass \_\_\_\_ % Perennial Ryegrass \_\_\_\_ % Annual Bluegrass

\_\_\_\_ % Fine Fescue \_\_\_\_ % Tall Fescue \_\_\_\_ % Bentgrass

\_\_\_\_ % Zoysia \_\_\_\_ % Other/Mixture \_\_\_\_ Don’t know

1. What are the important sources of information for your turf-related problems? (Select all that apply).

 Rutgers Cooperative Extension Agent or Specialist  Cook College Office of Continuing Professional Education

 Rutgers University (other)  Private consultant

 Commercial Tech Rep.  Peers

 Industry magazines  Professional Organization

 Internet  TV/Radio

 Books  Other (specify)\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

# C. Clients

1. Please indicate the percentage (approximate to the nearest whole number) of the following clients you serve.
   1. Households \_\_\_\_\_ (%)
   2. Golf Courses \_\_\_\_\_ (%)
   3. Commercial institutions (eg., businesses, apartments, etc.) \_\_\_\_\_ (%)
   4. Non-profit institutions (e.g, churches, schools, etc.) \_\_\_\_\_ (%)
   5. Others (specify) \_\_\_\_\_ (%)\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_ (%)\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_ (%)\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

1. Based on your company’s sales, which of your client groups have experienced the highest rate of growth in the past 5 years? Please rank the top three in descending order.

Fastest growing client group **\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

2nd fastest growing client group **\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

3rd highest growing client group **\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

# D. Turf and Landscape Problems

1. What do you consider to be difficult turf and landscape related problems facing your industry? (Select all that apply under each category).

**a. Regulation**

 Local noise ordinances  Water restrictions  Signposting (chemical applications)

 Pesticide application (amount, type of chemical)  Other (specify) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**b. Management**

 Labor availability  Immigration laws  Employee training

 Health issues due to turf activity (i.e., poisoning, etc.)  Language barriers

 Other (specify) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

* 1. **Turfgrass**

 Soil related  Diseases  Insects

 Weeds  Equipment Cost  Erosion

 Water related  Shade  Traffic

 Other (specify) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

1. Which do you anticipate to be the major turf-related problems 5 years from now? (Select all that apply under each category). **a. Regulation**

 Local noise ordinances  Water restrictions  Signposting (chemical applications)

 Pesticide application (amount, type of chemical)  Other (specify) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**b. Management**

 Labor availability  Immigration laws  Employee training

 Health issues due to turf activity (i.e., poisoning, etc.)  Language barriers

 Other (specify) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

* 1. **Turfgrass**

 Soil related  Diseases  Insects

 Weeds  Equipment Cost  Erosion

 Water related  Shade  Traffic

 Other (specify) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

## E. Expenses (Please use previous business year figures to answer sections E and G.)

17. **Best Estimate of annual turf-related service costs during the year 2018 (to the nearest $1,000)**:

1. **Seed**……………………………………….……………………………………….……. $ **\_\_\_\_\_\_\_\_\_\_**
2. **Sod**………………….…………………………………………………………………… $\_\_\_\_\_\_\_\_\_\_
3. **Erosion control (turf related mulches)**…………………………………………….…. $\_\_\_\_\_\_\_\_\_\_
4. **Equipment and Operation (exclude labor)**

Tractors (depreciation)……..………...……………………………...……. $ \_\_\_\_\_\_\_\_\_\_

Mowers (depreciation)….…………………………………………………. $ \_\_\_\_\_\_\_\_\_\_

Irrigation equipment (depreciation)….…………..……………………...… $ \_\_\_\_\_\_\_\_\_\_

Application equipment (depreciation)…..………………………………… $\_\_\_\_\_\_\_\_\_\_

Other equipment (depreciation)….……..…………………………………. $ \_\_\_\_\_\_\_\_\_\_

Vehicles (depreciation)………………….………………………………… $\_\_\_\_\_\_\_\_\_\_

Fuel, lube and electricity…………..………………………………………. $ \_\_\_\_\_\_\_\_\_\_

Repairs and maintenance……………………….…………………………. $ \_\_\_\_\_\_\_\_\_\_

Equipment rental……………………………..……………………………. $ \_\_\_\_\_\_\_\_\_\_

**e) Chemicals**

Weed control products……………………………….……………………. $ \_\_\_\_\_\_\_\_\_\_

Insect control products…….…………………..………….……………….. $ \_\_\_\_\_\_\_\_\_\_

Disease control products……..…………….……………………………… $ \_\_\_\_\_\_\_\_\_\_

Plant-growth regulators ...……........………………………………………. $ \_\_\_\_\_\_\_\_\_\_

Other.…………………………...………………………………………….. $\_\_\_\_\_\_\_\_\_\_\_

**f) Fertilizer and Soil Amendments**

Fertilizer ………...………………………………………………………… $ \_\_\_\_\_\_\_\_\_\_

Organic Fertilizer .………………………………………………………… $ \_\_\_\_\_\_\_\_\_\_

Lime…………….….……………………………………………………… $ \_\_\_\_\_\_\_\_\_\_

Natural/organics…....……………………………………………………… $ \_\_\_\_\_\_\_\_\_\_

Soil amendments……….………………………………………………….. $\_\_\_\_\_\_\_\_\_\_

Other…...……………….…………………………………………………. $\_\_\_\_\_\_\_\_\_\_

**g) Labor (salaries/wages, not taxes)**

Production wages/salaries…………………………………….…………… $ \_\_\_\_\_\_\_\_\_\_

Supervisory wages/salaries……………………………………….….……. $ \_\_\_\_\_\_\_\_\_\_

Mechanics/maintenance…………………………………………………… $\_\_\_\_\_\_\_\_\_\_

Clerical/sales wages/salaries..…………………...………………………… $ \_\_\_\_\_\_\_\_\_\_

**h) Services purchased/subcontracts**

Chemical/fertilizer application…………………………………………..... $ \_\_\_\_\_\_\_\_\_\_

Sod installation………...…………………………………………..……… $ \_\_\_\_\_\_\_\_\_\_

Transport services/trucking/hauling…………….………………………… $ \_\_\_\_\_\_\_\_\_\_

Irrigation installation……………………………………………………… $ \_\_\_\_\_\_\_\_\_\_

Other contract labor..……………………………………………………… $ \_\_\_\_\_\_\_\_\_\_

i) **Advertising cost**………...………………………………...…………………………….. $ \_\_\_\_\_\_\_\_\_\_

1. **Other direct expenses** (Specify)...………………...……………………………………. $ \_\_\_\_\_\_\_\_\_\_

……………………………………………………………….………….… $ \_\_\_\_\_\_\_\_\_\_

……………………….…..………………………………….…………….. $ \_\_\_\_\_\_\_\_\_\_

……………………………………………….………………..…………... $ \_\_\_\_\_\_\_\_\_\_ ...……………………………………………………………….……..…… $ \_\_\_\_\_\_\_\_\_\_

1. **Total turf-related expenses.………………………………...………………………….. $ \_\_\_\_\_\_\_\_\_\_**

1. Equipment/supplies purchased in 2018 from vendors outside of New Jersey was \_\_\_\_\_\_% of total expense.

1. What was the estimated value of turf-related buildings and land owned and used by this firm as of the end of 2018 (to the nearest $1,000)? $ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

1. What was the estimated value of turf-related equipment owned and used by this firm as of December 2018?

(include tractors, mowers, seeders, etc.) $ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

1. How many positions did this institution or company have in 2018? \_\_\_\_\_\_\_\_\_\_\_ employees
2. What percentage of the your company’s total workforce do the following categories represent?
   * Year round full-time \_\_\_\_\_\_%
   * Seasonal full-time \_\_\_\_\_\_%
   * Year round part-time \_\_\_\_\_\_%
   * Seasonal part-time \_\_\_\_\_\_%

1. Please indicate the percentage of total hours devoted to turf-related activities by the following employees.
   * Year round full-time \_\_\_\_\_\_%
   * Seasonal full-time \_\_\_\_\_\_%
   * Year round part-time \_\_\_\_\_\_%
   * Seasonal part-time \_\_\_\_\_\_%

# F. Cultural Practices and Equipment

1. What types of lawn mower are primarily used by your company (check all that apply)?

 Riding  Walk-behind  Push Self-propelled

 Push  Other (specify)\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

1. How are grass clippings handled on the majority of your clients’ property?

 always bagged and removed  collected and composted  disposed with trash

 left on ground (rarely or never removed)  bagged and removed only for heavy growth

1. What is the typical width/size of the mower used by your company? \_\_\_\_\_\_\_\_\_\_\_inches

1. What is the average interval between mowings on your clients’ property? \_\_\_\_\_\_\_\_\_days

1. Please indicate the proportion of your clients’ turf area receiving fertilizer applications:

\_\_\_\_ % 1-2 times per year

\_\_\_\_ % 3-4 times per year

\_\_\_\_ % 5-6 times per year

\_\_\_\_ % 7 or more times per year

1. Please indicate the proportion of your clients’ turf area receiving other chemical (e.g., insecticides, herbicides, etc.) applications:

\_\_\_\_ % 1-2 times per year

\_\_\_\_ % 3-4 times per year

\_\_\_\_ % 5-6 times per year

\_\_\_\_ % 7 or more times per year

1. Do you monitor the water needs of turf on your clients’ property?

 Yes  No

1. Do you regulate the amount of water being applied to turf on your clients’ property?

 Yes  No

1. What is the average interval between waterings without rain? \_\_\_\_\_\_\_\_\_days  Don’t know

1. What is the length of time you water when irrigating? \_\_\_\_\_\_\_\_\_hours  Don’t know

# G. Sales

1. What was your company’s total billing for each of the following during 2018? (to the nearest $1,000)

Mowing..………….……………………………………………………………..…………….. $\_\_\_\_\_\_\_\_\_\_

Turf fertilizer and pest control……..……..……………………………………………………$\_\_\_\_\_\_\_\_\_\_

Turf establishment and renovation...…………………………………………….………….… $\_\_\_\_\_\_\_\_\_\_

Turf irrigation installation and maintenance…………………………………….………….… $\_\_\_\_\_\_\_\_\_\_

Other billings this firm had in 2018 (NOT related to the care or installation of plants)……... $\_\_\_\_\_\_\_\_\_

**Total Gross Sales for Turf-Related Business...…………………………………………… $\_\_\_\_\_\_\_\_\_\_**

1. Please indicate the methods of advertising used by your company during 2018. (Select all that apply).

 Newspaper  Direct Mail  Radio

 Television  Signs  Brochures

 Internet  Yellow pages  Billboards

 Other (specify) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

# H. Opinion

1. How do you feel the demand for turf-related services will change over the next 5 years?

 Increasing  Constant

 Decreasing  Don’t know

1. Do you believe turfgrass represents a healthy environment?

 Yes  No  Don’t know

1. Do you believe pesticide residues on turf present potential health risks to turf users?

 Yes  No  Don’t know

1. Is it important to develop turfgrasses that require less pesticide inputs?

 Yes  No  Don’t know

1. Is it important to develop turfgrasses that use less water?

 Yes  No  Don’t know

1. Do you know what Integrated Pest Management (IPM) is?

 Yes  No

1. Which of the following best fits your view of what IPM is?

 No chemical use  Pesticide use as last resort  Least toxic chemical use

 Best use of chemical, cultural, biological, and genetic pest control strategies

1. Do you use IPM on you clients’ properties?

 Always  Sometimes  Never

 Not practical

1. Do you understand how Rutgers Cooperative Extension (RCE) services can help you?

 Yes  No  Not familiar with RCE

1. How do you perceive Rutgers Cooperative Extension?

 Very helpful  Helpful  Fair

 Not helpful  Don’t know

1. How do you perceive Cook College Office of Continuing Professional Education?

 Very helpful  Helpful  Fair

 Not helpful  Don’t know

1. Please "grade" the Rutgers Turfgrass program in the following areas, using the appropriate number.

1 = Excellent 2 = Good 3 = Fair 4 = Unsatisfactory 5 = Don’t know

\_\_\_\_\_ Research \_\_\_\_\_ Undergraduate Education

\_\_\_\_\_ Extension/Outreach \_\_\_\_\_ Web-Page content

1. Would you grow/maintain a genetically modified turfgrass or ornamental plant if it were proved to be safe?

 Yes  No  Not Sure

1. In the past 5 years, were you affected by water regulations during a time of drought?

 Yes  No (skip questions 50 and 51)

1. Please estimate the total loss of business in terms of decreased revenue during the drought. $ \_\_\_\_\_\_\_\_\_\_

1. Please estimate the number of employees laid off because of water restriction regulations.

\_\_\_\_\_\_\_\_full-time employees and \_\_\_\_\_\_\_\_part-time employees

# I. Ornamental plantings

1. Do you provide services for ornamental plantings?

 Yes  No (skip question 53)

1. What were the total billings for servicesprovided for ornamental plantings in 2018 (to the nearest $1,000)?
   1. Landscape design…………………………………………………………………… $\_\_\_\_\_\_\_\_\_\_
   2. Installation of plantings (shrubs/trees/flowers)……………………………………... $\_\_\_\_\_\_\_\_\_\_
   3. Pruning/cutting……………………………….…….……………………………….. $\_\_\_\_\_\_\_\_\_\_
   4. Herbicides………………………………………….……………………………….. $ \_\_\_\_\_\_\_\_\_\_
   5. Insecticides………………………………………….……………………………… $ \_\_\_\_\_\_\_\_\_\_
   6. Other pesticides………………………………………..……………………………. $ \_\_\_\_\_\_\_\_\_\_
   7. Fertilization in liquids and granules………………………………………………… $ \_\_\_\_\_\_\_\_\_\_
   8. Irrigation parts and accessories (includes sprinklers, valves, hoses, etc)……….……$ \_\_\_\_\_\_\_\_\_\_
   9. Landscape materials (mulch, hardscaping, rock, fence, others)……………………. $ \_\_\_\_\_\_\_\_\_\_
   10. Training and training materials…………………………………………………...… $ \_\_\_\_\_\_\_\_\_\_
   11. Other (specify) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_……………………….………….………. $ \_\_\_\_\_\_\_\_\_\_
   12. **Total Gross Sales for Ornamental Business……………………………………... $ \_\_\_\_\_\_\_\_\_\_**

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
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