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# Midwestern Retail Garden Centers Identify Satisfaction/Dissatisfaction with Supplying Wholesale Nurseries<sup>1</sup>

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## Abstract

A survey was conducted to assess the attitudes of Midwestern retail nursery operators concerning current marketing, promotion, sales, and service practices of their wholesale nursery stock suppliers. Completed questionnaires were received from 290 individuals (42.2% response rate). Respondents indicated quality of plant materials (96.5%), availability of plant materials in desired quantities (67.8%), wide assortment of plant materials (53.5%), and price of nursery stock (40.3%) were very important reasons for conducting business with a wholesale supplier. The majority of respondents said they were 'very satisfied' with the condition of bare-root trees and shrubs (75.1%), bedding plants (72.9%), herbaceous perennials and ornamental grasses (72.2%), container-grown trees and shrubs (72.0%), and balled-and-burlapped trees and shrubs (67.4%) shipped by their wholesale supplier. Over one-half (56.5%) also said they were 'very satisfied' with aquatic plant shipments. On those occasions when plants arrived in unsatisfactory condition, the most frequently cited problems were, dry bare-root stock (34.4%), physically damaged container-grown stock (56.0%) and balled-and-burlapped stock (40.0%), undersized herbaceous plants (20.3%), and aquatic plants damaged in transit (12.1%). In general, retailers were most favorably impressed with the respectful and helpful way wholesalers attempted to meet their business needs (57.1%). Retailers were most frustrated with shortages, unauthorized substitutions, and last-minute cancellations (31.9%).

**Index words:** business practices, landscape plants, inventory, catalogs, shipping, damage, aquatic plants, container-grown, balled-and-burlapped, bare-root.

## Significance to the Nursery Industry

At \$10.9 billion in grower receipts in 1996, floriculture and environmental horticulture crops are the seventh most important commodity group and represent the fastest growing segment of agriculture in the United States. One of the most important business relationships within this sector of agriculture is that between nursery stock producer and retail garden center; however, little information exists to gauge the success or failure producers have had in satisfying their valuable retail clients in the Midwestern United States. Retailers responding to our survey indicated quality of plant materials was the most important determining factor for conducting business with a wholesale supplier. In general, the majority of respondents in this study said they were very satisfied with plant material shipments, but identified dry bare-root stock, physical damage to container-grown, balled-and-burlapped, and aquatic plants, and undersized herbaceous plants as occasional problems. Wholesale suppliers will reduce frustrations and improve business relationships with retail nursery clients when they work to reduce or eliminate nursery stock order shortages, unauthorized substitutions, and last-minute cancellations, particularly on confirmed orders.

## Introduction

The nursery industry in the United States is diverse, complex, and somewhat fragmented. Its segments include production nurseries, retail nurseries, mail-order nurseries, landscape design/installation firms, horticultural distribution centers, plant maintenance companies, and/or hybrid enterprises that function in several capacities. When these segments are considered as a unit, the 'green industry' has considerable economic impact. Based on grower cash receipts, the floriculture and environmental horticulture sector (greenhouse, turfgrass, and nursery-related crops) is the seventh most important agricultural commodity group and represents the fastest growing segment of agriculture in the United States (9). Grower cash receipts for greenhouse and nursery crops reached \$10.9 billion in 1996, up 5% from the previous year's receipts of \$10.4 billion (9).

As useful as cash receipts data are, they provide little insight into the marketing practices of the nursery industry (10). Marketing, or tailoring product characteristics to the preferences of buyers, is a key ingredient in profitability. Reliable, current information about changing preferences is essential for business success (2). Several studies have provided useful information about the relationship between retail garden centers and their customers (8, 12). Yet one of the most important business relationships in the nursery industry is that between wholesale plant producer and retail garden center. Specific information about this relationship can be gleaned from studies conducted in Georgia (3), California (10), south Florida (6), the western United States (11), and the northeast United States (4). This study was designed to identify satisfactions and dissatisfactions of Midwestern retailers with their wholesale nursery stock suppliers.

## Materials and Methods

Data were collected by using a mail questionnaire. Survey questionnaires were sent by first-class mail on December 1, 1996, to 687 retail garden centers identified from nursery

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**Table 1. Reported importance of wholesale catalog features by Midwestern retail nurseries.**

Catalog feature	Degree of importance (% response)				
	Very important	Important	Neutral	Unimportant	Very unimportant
Current prices (n = 285) <sup>a</sup>	80.3	15.8	2.8	0.7	0.4
Plant cultivar and trade names (n = 288)	56.6	33.0	8.7	1.7	0.0
Plant cultural requirements (n = 287)	43.2	44.9	7.3	3.5	1.1
Information about maintaining plant quality at the nursery (n = 288)	21.2	33.7	26.7	12.2	6.2
Color photographs (n = 285)	14.8	44.9	29.8	7.7	2.8
Landscape uses suggested for plants in the catalog (n = 287)	14.6	49.8	24.4	9.1	2.1
Ideas for seasonal promotions (n = 287)	13.2	32.1	34.1	13.6	7.0
Tips for displaying plants (n = 287)	10.0	33.8	32.8	15.7	7.7

<sup>a</sup>Number of individuals responding to a category.

association mailing lists in 12 Midwestern states: Illinois (64); Indiana (58); Iowa (50); Kansas (58); Michigan (84); Minnesota (76); Missouri (62); Nebraska (34); North Dakota (16); Ohio (107); South Dakota (32); and Wisconsin (46). The number of garden centers contacted reflects the relative abundance of retailers in each state. Mailed questionnaires included a cover letter explaining the objective of the research and instructions for returning the completed questionnaire. Postage for returning the questionnaire was pre-paid. On January 3, 1997, a follow-up reminder postcard was sent to the 687 firms originally contacted. Mass merchants, home stores, and grocery stores were excluded from this study.

The questionnaire contained 35 numbered questions (some with multiple parts), in both closed-end and open-end form, grouped under the following headings: a) Business Profile; b) Preliminary Questions; c) Catalogs and Labels; d) Service and Problem Resolution; e) Delivery and Unloading; f) Product Quality and Satisfaction; and g) Final Thoughts.

No attempt was made to identify from which state questionnaires were returned. Percentage results presented are based on reported totals. The frequency distribution of responses was tabulated for each question with PROC FREQ of SAS (SAS Institute, Cary, NC).

## Results and Discussion

**Business profile.** Completed questionnaires were received from 290 firms (42.2% response rate). Most of the questionnaires were completed by owners and/or managers (95.8%). The largest percentage of respondents identified the 'main focus' of their business as retail nursery/garden center (44.4%); however, 73.2% of all respondents said at least 50% of their annual earnings were derived from the retail nursery portion of their business. Over one-quarter (29.5%) could not identify a main focus, but instead said their business provided multiple services to their clients. The remaining participants reported some retail nursery sales but identified the 'main focus' of their business as landscape design/installation (25.0%) and rewholesale nursery (1.1%). The year of business establishment was summarized as: Prior to 1950 (14.7%); 1950 to 1969 (21.9%); 1970 to 1989 (50.9%); and 1990 to present (12.5%).

**Preliminary questions.** Survey participants reported stocking a wide variety of woody and herbaceous plants; container-grown shrubs (99.0%), herbaceous perennials (97.2%), balled-and-burlapped trees (93.2%), ornamental grasses (92.6%), container-grown trees (92.2%), bedding plants

(85.3%), and balled-and-burlapped shrubs (79.0%), but less than half of the respondents included bare-root shrubs (49.6%), bare-root trees (47.8%), or aquatic plants (48.1%) in their inventories.

Over one-half (53.5%) of the retail nurseries contacted in this study grow 10% or less of their nursery stock inventory, and only 13.8% grow more than 50%. Local wholesale growers (those within a 100-mile radius of the respondents' nursery) and those located in the same state are able to satisfy some of the plant material needs of retail nurseries; however, 57.6% and 51.2% said they purchase less than 25% from local growers and in-state growers, respectively. Over two-thirds (68.4%) said they purchase at least 50% of their green goods from wholesale growers in the Midwest.

Over two-thirds (69.9%) of the businesses surveyed order the majority of their nursery stock from wholesale suppliers for the coming year by the end of October. Only 16.1% wait until after the first of the year to submit plant material orders. The preferred method for placing orders is by telephone (83.5%). Only 35.4% said they like to order plants in person from sales representatives at nursery association trade shows.

Most retail nurseries rely on more than one wholesale supplier for their plant material needs. For example, over three-fourths of the respondents that purchase balled-and-burlapped trees and shrubs (83.0%) and bare-root trees and shrubs (80.9%), do so from at least two to three nurseries. More than one-half depend on at least four to five nurseries for container-grown trees and shrubs (65.7%) and herbaceous perennials and ornamental grasses (53.1%); however, 52.9% reported using only one nursery to supply their aquatic plants.

When survey participants were questioned about the frequency of change in nursery stock suppliers over the last 5 to 10 years, a majority reported 'very little' change in their suppliers of aquatic plants (75.4%), bedding plants (62.8%), and bare-root trees and shrubs (62.2%). Retailers reported making 'some' change in suppliers of container-grown trees and shrubs (46.8%), herbaceous perennials and ornamental grasses (42.9%), and balled-and-burlapped trees and shrubs (42.3%). Herbaceous perennial and ornamental grass growers also were subject to the most turnover as 12.8% of respondents reported 'a lot' of change in these suppliers.

**Catalogs and labels.** Wholesale nursery stock suppliers rely on their product catalogs to deliver important information to current and prospective clients, and to convey an image of competency and professionalism. When asked to rank wholesale catalog features (on a scale of 1 to 5, where 1 =

**Table 2. Reasons reported by Midwestern retail nurseries for conducting business with a wholesale supplier.**

Reasons for conducting business	Degree of importance (% response)				
	Very important	Important	Neutral	Unimportant	Very unimportant
Quality of plant materials (n = 286) <sup>a</sup>	96.5	3.1	0.4	0.0	0.0
Availability of plants in desired quantities (n = 286)	67.8	30.1	2.1	0.0	0.0
Variety of plants available (n = 286)	53.5	40.9	5.6	0.0	0.0
Price of nursery stock (n = 288)	40.3	50.7	8.7	0.3	0.0
Flexible delivery schedule (n = 283)	31.8	51.9	14.1	1.4	0.8
Location of wholesaler (n = 286)	26.2	48.3	17.8	6.6	1.1
Tradition of purchasing from the supplier (n = 283)	19.8	48.4	24.0	6.0	1.8
Quality of advertising (n = 285)	4.2	19.7	45.6	23.1	8.4

<sup>a</sup>Number of individuals responding to a category.

very important to 5 = very unimportant) a majority of respondents said listing current prices (80.3%) and both cultivar and trade names of plants (56.6%) were very important catalog features (Table 1). Providing basic cultural requirements for each plant taxon (43.2%) and information about maintaining plant quality at the retail nursery (21.2%) also were considered very important by respondents. Catalog features of lesser importance were color photographs, suggestions for using plants in the landscape, ideas for seasonal promotions, and tips for displaying plants.

Plant material arriving at the retail nursery should be clearly identified with accurate labels securely attached to individual plants or bundles of plants. Over two-thirds of respondents (68.7%) said 75% or more of their suppliers provide such identification, but only 26.0% said all of their nursery stock arrived with appropriate identification.

In addition to identification labels, many wholesalers offer descriptive labels that provide detailed information about plants sold to the retailer. When asked about the kinds of information that should appear on plant labels, a large number of respondents said common name (97.2%), scientific name (92.6%), hardiness zone rating (86.3%), plant description (85.0%), cultural information (79.9%), and photograph (72.9%) should be included. Less than one-half (47.3%) said information about native habitat should be included on the label.

**Service and problem resolution.** The mutually beneficial relationship between wholesale supplier and retail nursery can be jeopardized if the retailer perceives a lack of attention or commitment to service and problem resolution from the wholesaler. We asked respondents to rank (on a scale of 1 to 5, where 1 = very important to 5 = very unimportant) their reasons for conducting business with a wholesale supplier. Many stated quality of plant materials (96.5%), availability of plant materials in desired quantities (67.8%), wide assortment of plant materials (53.5%), price of nursery stock (40.3%), flexible delivery schedule (31.8%), location of nursery (26.2%), and tradition of purchasing from a given supplier (19.8%) were very important considerations (Table 2). Quality of advertising, such as advertising in trade magazines, was considered very important by only 4.2% of retailers.

Because nursery stock from the wholesale supplier often is offered immediately for sale to the consumer, the condition of plants upon arrival at the retail outlet is of paramount importance. In general, retailers are confident in the quality

of plants shipped by wholesale nurseries as 69.4% said 100% of their nursery stock suppliers guarantee the plants they ship will arrive in acceptable condition. Another 84.7% said 90% or more of their suppliers guarantee acceptable plants.

But problems with nursery stock, such as unsatisfactory condition or grade, do occur. In this study respondents said they either frequently or sometimes filed claims or registered complaints with their wholesale suppliers because of shortages (60.2%) or poor quality nursery stock (49.1%) (Table 3). But large numbers of retailers said they rarely or never experienced problems with mislabeled plants (85.6%), plants without labels (83.5%), unauthorized plant substitutions (75.3%), unauthorized size substitutions (72.0%), or plants arriving in inappropriate stages of development (69.5%).

Policies and protocols for registering complaints about a shipment of nursery stock vary by supplier. The majority of respondents (74.1%) said a telephone call to the wholesaler within 24 hours of delivery was the only requirement. Considerably fewer retailers said their suppliers require a letter describing the problem in detail (28.5%), an inspection visit from a company representative (22.7%), or a photograph of the problem (11.0%). When asked to characterize their suppliers' manners when responding to problems or questions about a shipment, the overwhelming majority of respondents said they were either always or usually courteous (98.9%), fair (95.1%), and quick to resolve problems (89.1%).

One of the more contentious issues embroiling the nursery industry during the last 10 to 15 years involves the relationship between wholesale nursery stock supplier and the mass merchant (discount) and the effect of that relationship on the independent or specialty retailer (1, 5, 7). The majority of respondents in this study (72.6%) were aware their wholesale supplier also sold to mass merchandisers, but over one-half (58.2%) said large discount chain stores should not have access to the same product lines as independent retailers. The overwhelming majority of retailers in this study (98.6%) said they do not receive credit from their suppliers for plants not sold, nor do they believe mass merchants should have their accounts credited for unsold plants (97.5%).

**Delivery and unloading.** How wholesalers deliver their products or how buyers choose to receive them are decisions usually made after careful planning (13). During the short spring shipping season, retail nurseries and garden centers rely on several distribution methods for receiving their nursery stock. The most frequently cited delivery method was by truckload or common carrier (90.3%). Deliveries also occur



**Table 3. Claims or complaints filed with wholesale suppliers and their frequency reported by Midwestern retail nurseries.**

Reason for claim/complaint	Frequency of claim/complaint (% response)			
	Frequently	Sometimes	Rarely	Never
Shortages (n = 284) <sup>a</sup>	12.7	47.5	32.4	7.4
Unauthorized plant substitutions (n = 283)	3.2	21.5	43.5	31.8
Unauthorized size substitutions (n = 283)	2.5	25.5	47.3	24.7
Poor quality nursery stock (n = 285)	2.4	46.7	47.4	3.5
Under-sized nursery stock (n = 285)	1.4	37.2	48.1	13.3
Plants arriving in inappropriate stage of development (n = 285)	1.4	29.1	48.1	21.4
Plants with no labels (n = 285)	1.4	15.1	50.9	32.6
Mislabeled plants (n = 284)	1.4	13.0	58.8	26.8

<sup>a</sup>Number of individuals responding to a category.

via the wholesalers' trucks (87.9%), United Parcel Service or other delivery services (80.3%), and retailers picking up the stock themselves (64.4%).

Coordinating the arrival of nursery stock shipments also requires careful planning, yet deliveries sometimes occur unannounced, all at once, or at an inconvenient time. To lessen the confusion and chaos common during the spring shipping season, most retailers request advance notice of deliveries from their suppliers. The majority of respondents in this study prefer 24 hours notice (67.7%), while 20.8% said one week would be sufficient notice. Over three-fourths of respondents (81.4%) indicated truck drivers delivering their shipment called before their arrival.

The number of shipments of nursery stock that arrive at inopportune times can be reduced by informing suppliers of acceptable and unacceptable delivery days and times; however, only 46.7% of our respondents make such a schedule known to wholesalers. When preferred delivery days and times were provided, only 22.1% of retailers said 30% or more of their deliveries arrive at times other than those designated.

A majority of respondents (70.6%) said they expect truck drivers to assist with unloading of nursery stock, but only 38.9% said that most of their drivers (90–100%) help unload.

**Product quality and satisfaction.** In general, respondents were satisfied with the condition of nursery stock upon arrival from the wholesale supplier. In fact, a majority of retailers said they were 'very satisfied' with bare-root trees and shrubs (75.1%), bedding plants (72.9%), herbaceous perennials and ornamental grasses (72.2%), container-grown trees and shrubs (72.0%), and balled-and-burlapped trees and shrubs (67.4%) (Table 4). Over one-half (56.5%) also said they were 'very satisfied' with aquatic plant shipments.

Next, respondents were asked to identify their most frequent problem with nursery stock on those occasions when it arrived in an unsatisfactory condition. For bare-root stock, the most frequently cited problem was dry plants caused by poor temperature and/or humidity control while in transit (34.4%). Physically damaged plants (broken branches, roots, and other abrasions) was the next most frequently mentioned problem (27.6%). Many retailers believed this type of damage occurred during the unloading process as people either walked on or struggled to untangle plants inside the trailer. Only 6 respondents (2.7%) complained of shortages or size substitutions.

Physical damage during shipping was the most frequent problem reported with container-grown stock (56.0%). Retailers thought rough handling, poor stacking technique inside the trailer, and subsequent load shifting during the trip from wholesaler to retailer were to blame for crushed plants, broken stems, and overturned plants. Undersized or underdeveloped plants, and/or plants not fully established in their containers, ranked second (17.3%) among problems with container-grown stock. Another 14.9% mentioned wilted or excessively dry plants were problematic.

Physical damage to the rootball and/or loosening of the plant within the rootball was the most frequently mentioned problem with balled-and-burlapped stock (40.0%). Loading balled-and-burlapped stock when rootballs are excessively wet, and stacking heavy and awkward-to-handle balled-and-burlapped trees and shrubs inside trailers were thought to be responsible for physical damage. Another 21.7% said broken branches, scarred trunks, and other types of mechanical injury were their most frequent problem. Several respondents suggested shipping balled-and-burlapped nursery stock on flat-bed or open trailers instead of inside enclosed trailers as a way to reduce or eliminate damage to the rootball, stem or trunk, and plant canopy.

**Table 4. Degree of satisfaction reported by Midwestern retail nurseries with the condition of nursery stock from wholesale suppliers.**

Nursery stock category	Degree of satisfaction (% response)		
	Very satisfied	Somewhat satisfied	Not at all satisfied
Bare-root trees/shrubs (n = 261) <sup>a</sup>	75.1	24.5	0.4
Bedding plants (annuals) (n = 240)	72.9	26.7	0.4
Herbaceous perennials, ornamental grasses (n = 273)	72.2	27.8	0.0
Container-grown trees/shrubs (n = 279)	72.0	27.2	0.8
Balled & burlapped trees/shrubs (n = 264)	67.4	32.2	0.4
Aquatic plants (n = 154)	56.5	37.0	6.5

<sup>a</sup>Number of individuals responding to a category.

**Table 5. Reported willingness of Midwestern retailers to purchase nursery stock grown in various production methods.**

Production method	Willingness to purchase (% response)		
	Yes	Unsure	No
Plants propagated on their own roots (n = 282) <sup>a</sup>	67.0	30.1	2.9
Plants produced and shipped in in-ground plastic containers (n = 283)	60.8	30.4	8.8
Plants produced and shipped in biodegradable containers (n = 283)	47.3	27.2	25.5
Plants produced in copper-treated containers (n = 281)	47.0	50.5	2.5
Plants produced and shipped in in-ground fabric containers (n = 282)	30.9	35.8	33.3
Plants produced and shipped in flexible poly bags (n = 283)	10.2	30.7	59.1

<sup>a</sup>Number of individuals responding to a category.

Retailers said the most common problem with arriving herbaceous plants (bedding plants, perennials, etc.) was receiving undersized plants or those perceived as 'too small' and not ready for sale (20.3%). Others complained of plants damaged in transit (18.9%), receiving plants that had dried out (13.2%), or were moldy and diseased (8.8%).

Only 107 respondents (36.9%) chose to comment on problems with aquatic plant shipments. Most stated they either had no problems (44.9%) or had not yet added this group of plants to their inventory (21.0%). Plant damage caused by rough handling and/or inadequate packaging (12.1%), plants that are 'too small' (11.2%), and plants with poor or missing labels (8.4%) were problems noted by retailers of aquatic plants.

Several relatively new nursery crop production methods may change the way retailers handle, display, and ultimately offer plants to consumers; however, respondents in this study did not greet all of these methods with equal enthusiasm. For example, respondents said they were unsure (35.8%) or would not (33.3%) purchase plants grown and shipped in in-ground fabric containers (Table 5). Considerably fewer retailers (8.8%) said they would not purchase plants grown pot-in-pot or in in-ground plastic containers. Only 10.2% indicated they would purchase plants grown and shipped in flexible poly bags. In addition, 33.3% believed the growing media used by wholesalers for producing plants in containers did not promote good plant growth and made it difficult to maintain plant quality on the retail sales lot. Specifically, 90.3% thought container media used by growers were too light and difficult to wet and keep wet. Another 51.7% observed that container media would often shrink away from the walls of the container and make irrigation difficult.

When provided a final chance to comment on dealings with their suppliers, a majority said they were most favorably impressed with the respectful and helpful way wholesalers attempted to meet their business needs (57.1%). Good quality nursery stock (13.4%), and rapid response to claims and adjustments for poor or damaged plants (9.8%) also were appreciated by respondents. The most common frustration or complaint expressed by retailers included shortages, unauthorized substitutions, and last-minute cancellations (31.9%), particularly when orders had been placed early and then confirmed. Poor customer service (16.7%), insufficient inventories of popular plants (8.8%), shipping delays (8.3%), poor quality and undersized plants (7.4%), and ill will created by wholesalers offering special incentives to mass merchants (7.4%) also were noted by respondents.

The nursery industry contributes in many ways to the economic and environmental welfare of the Midwest, and its

competitiveness in the regional, national, and international marketplace is dependent upon the combined and coordinated efforts of wholesale suppliers and retail sellers. In general, this study has shown that retailers value their relationship with their nursery stock providers, and most believe services and products provided are of high quality. But there is room for improvement. If the relationship is to remain viable and mutually beneficial, wholesalers must continually evaluate and improve upon the products and services they offer to their valuable retail clients. Wholesale plant suppliers who provide useful and descriptive catalogs, high quality nursery stock with accurate and appropriate labels, expeditious problem resolution, and who avoid granting unfair advantage to mass merchants will be successful regardless of the pervading economic climate.

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