

NGINA 2023 MEMBER SURVEY SUMMARY

FACTORS CONTRIBUTING TO NGINA MEMBERSHIP



Thank you to everyone who participated in the NGINA's 2023 Member Survey. Your insights are invaluable in understanding the evolving needs and preferences within our community. This year's survey, comparing current and past data, has provided a clear view of emerging trends and sentiment amongst our members. It will directly inform our strategies, plans, and services, ensuring they align closely with your needs and expectations. We are committed to using these insights to enhance our support and drive the growth and success of our members in the nursery and garden industry. Here is a summary of the key results of the survey.

Major Business Concerns

- **Industry Skill Shortages:** Skill shortages in the industry are the most pressing issue, with 66.67% of respondents indicating this as a major concern. This has been a consistent issue over the years and the NGINA is continuing to work to increase apprenticeship numbers with TAFE Richmond
- **Transportation and Freight:** Transportation and freight are also significant concerns, cited by 58.33% of respondents. This could be due to rising fuel costs and other challenges in the supply chain.
- **Biosecurity:** Biosecurity is another major concern, with 56.25% of respondents indicating this as a significant issue. This could be due to increased regulations or the recent biosecurity incidents affecting the industry

including Red Imported Fire Ants, cane toads and new weed incursions

Desired Additional Member Services

- **Promoting Industry as a Career:** High demand at 66.67%, despite a slight decrease from 73% in 2021.
- **Industry-Based RTO Development:** Rising interest from 25.45% in 2022 to 47.92% in 2023.

Future Challenges:

- **Climate and Weather:** Concerns about climate change, weather variability, and water management were frequently mentioned. Respondents cited challenges like hail, rain, drought, and upcoming water restrictions as significant issues affecting their business planning and operations.

- **Economic Factors:** The economy was another major theme, with mentions of economic slowdown, higher interest rates, and less commitment to big spending projects. Some respondents also mentioned the challenges posed by Facebook sellers.
- **Staffing and Labour:** A significant number of respondents mentioned challenges related to staffing. This included skilled labour shortages, manpower turnover, and the complexities of employment law. Apprentice recruitment and retention were also mentioned.
- **Logistics and Distribution:** Logistics, distribution, and transport costs were cited as challenges. One respondent specifically mentioned the supply requirements of Bunnings as a logistical challenge.
- **Regulatory and Governmental Issues:** Some respondents mentioned challenges related to government red tape, changes to employment requirements, business structures, and tax requirements. Biosecurity and regulation were also cited.

- **Market and Competition:** Market uncertainty, increased market competition, and the dominance of large retailers were mentioned. One respondent specifically cited the challenge of getting entry to the market when not known.
- **Costs and Pricing:** Rising costs, including labour and overhead costs, were mentioned. The challenge of managing passing on increases in the overall cost of goods was also noted.
- **Other Challenges:** Other challenges included adapting to an ever-changing business landscape, providing employee flexibility, balancing product mix, pricing and quality, and managing margins.

Outlook on the Future of the Nursery and Garden Industry

- Majority feel positive about the future of our industry, with 56.25% expressing a fairly positive outlook and 18.75% feel very positive in 2023.

Overall Satisfaction and Business Performance

- Satisfaction Levels: A majority of respondents, 70.83%, are satisfied with

NGINA which is a significant increase from 49.09% in 2022. 18.75% are very satisfied and no one reported being dissatisfied (2022 5.45%) or very dissatisfied. This survey result suggests that recent initiatives and changes have been well-received.

- **Business Performance:** 68.75% of respondents reported making an operating profit which is a slight decrease from 78.26% in 2021. This indicates a generally healthy industry

Investments in Infrastructure and Technology

- **Infrastructure Investment:** Increased reluctance, with 43.75% not investing in 2023.
- **Technology Investment:** 50% did not invest in new technology in 2023, indicating cautious spending.

Staffing Trends

- Staff Numbers: Majority reported no change, with a slight increase in those reporting decreases compared to 2022.

We also received feedback and suggestions about how to improve NGINA Trade Days and how the NGINA itself could improve. This feedback will be sent to the relevant regional committee, Sydney Trade Day committee and investment committee and has already been reviewed by the NGINA board.

