



MARYLAND
NURSERY, LANDSCAPE
AND GREENHOUSE
ASSOCIATION, INC.

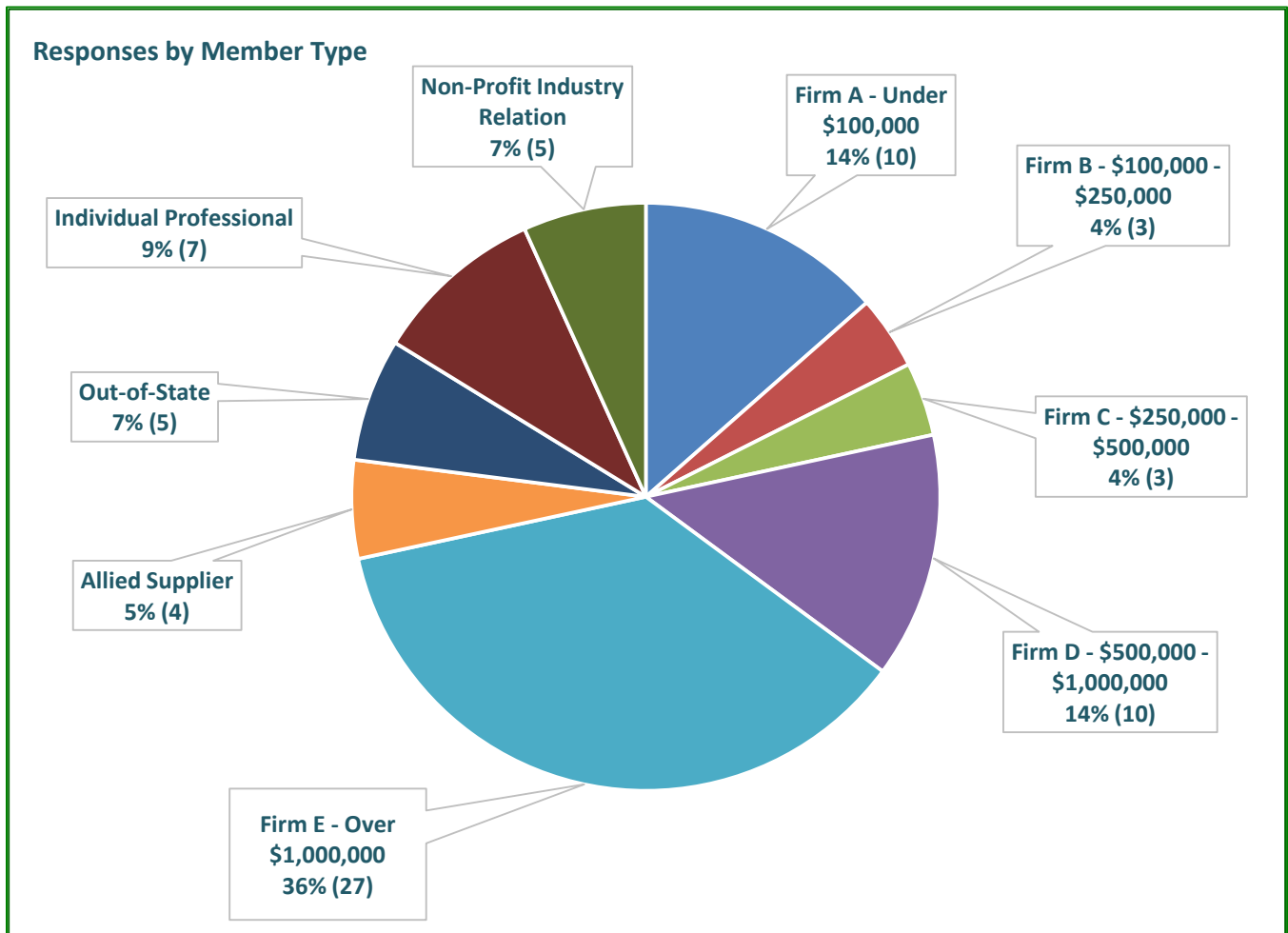
COVID-19
MEMBERSHIP
IMPACT SURVEY
RESULTS

(SURVEY SENT APRIL 2020)

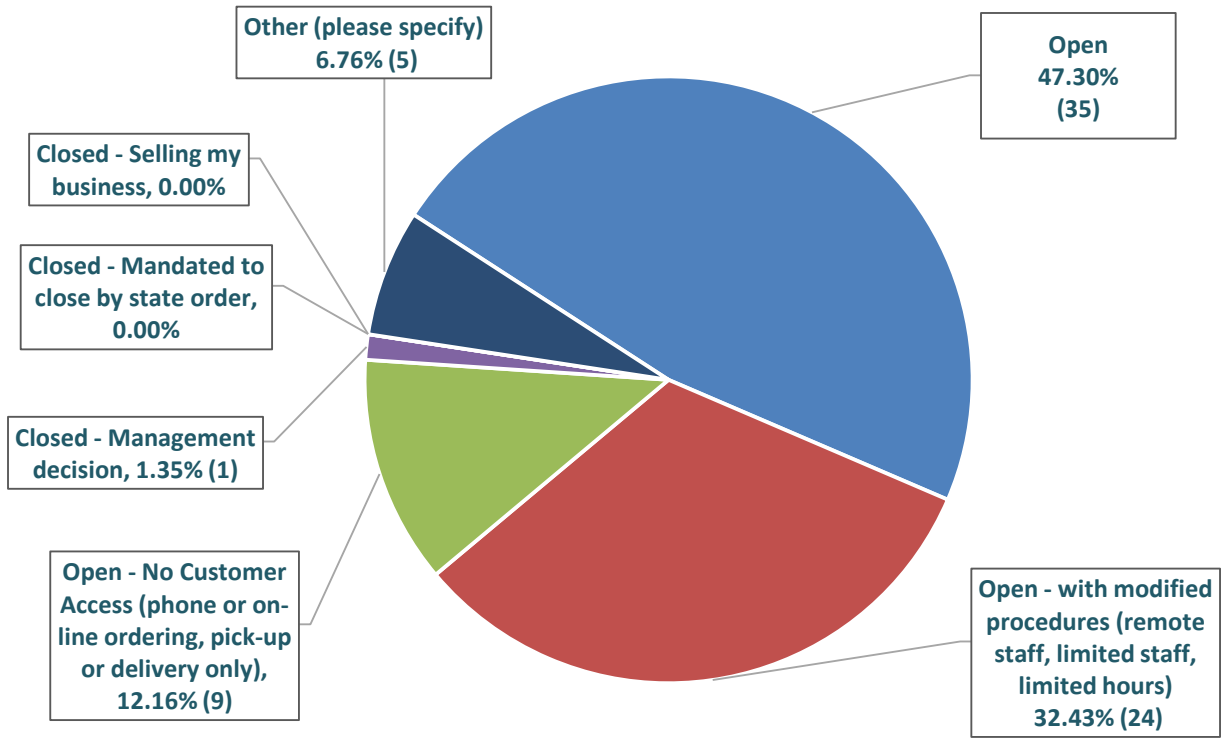
The COVID-19 Pandemic began in late 2019, became news in February 2020 and began impacting businesses in Maryland, including the Ornamental Horticulture Industry, in March 2020. On March 16, 2020, the first in a long and continuing series of Maryland State Gubernatorial Executive Orders were put into place and launched a statewide debate regarding what is considered an essential vs non-essential business. This history and sequence of these orders are available on mnlga.org. The Association responded in many ways to support the membership. Amongst them was to launch a COVID-19 Membership Impact Survey, the results of which are on the following pages.

The Survey was sent to 314 key company contacts and we received 74 responses which equates to a 23.5% response rate. By any measure, this is considered a statistically outstanding response rate.

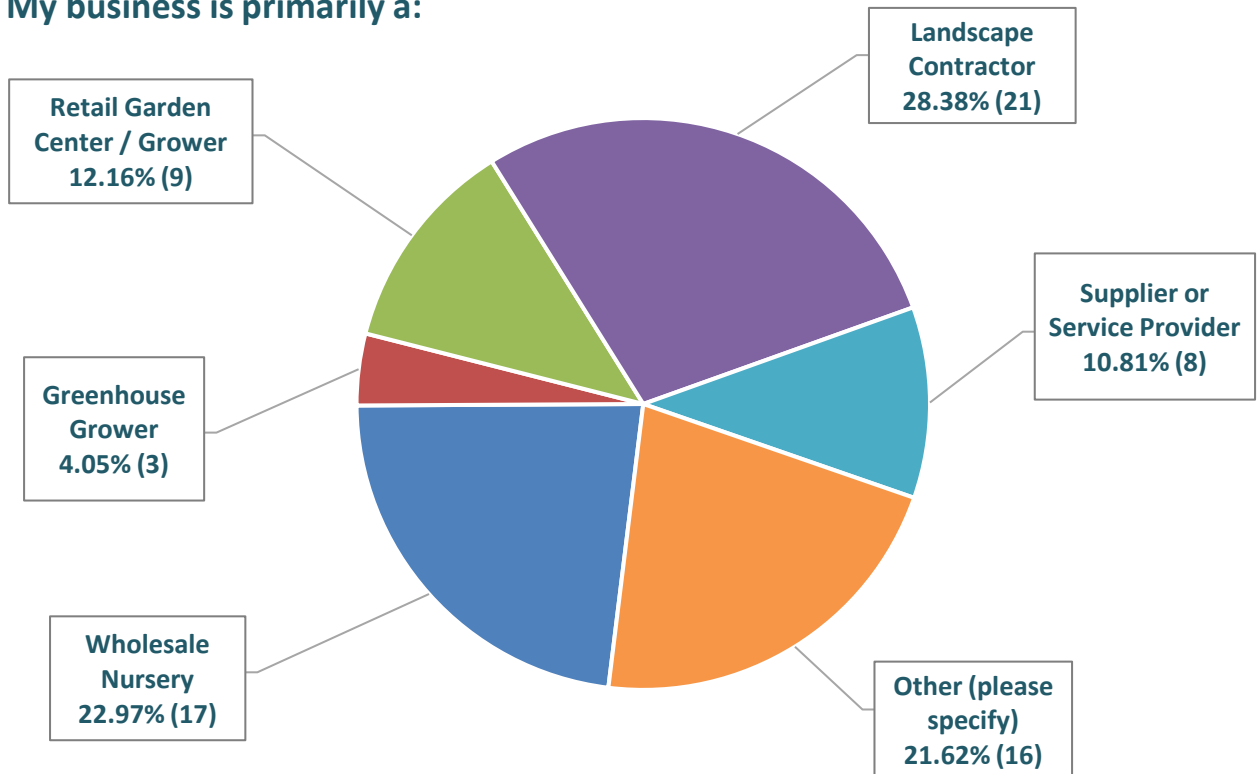
Below and on the following pages are the results of the survey. The results appear in chart, list, or written form depending upon the type of question asked. Where necessary additional information is provided about the answers.



Our Business is:



My business is primarily a:



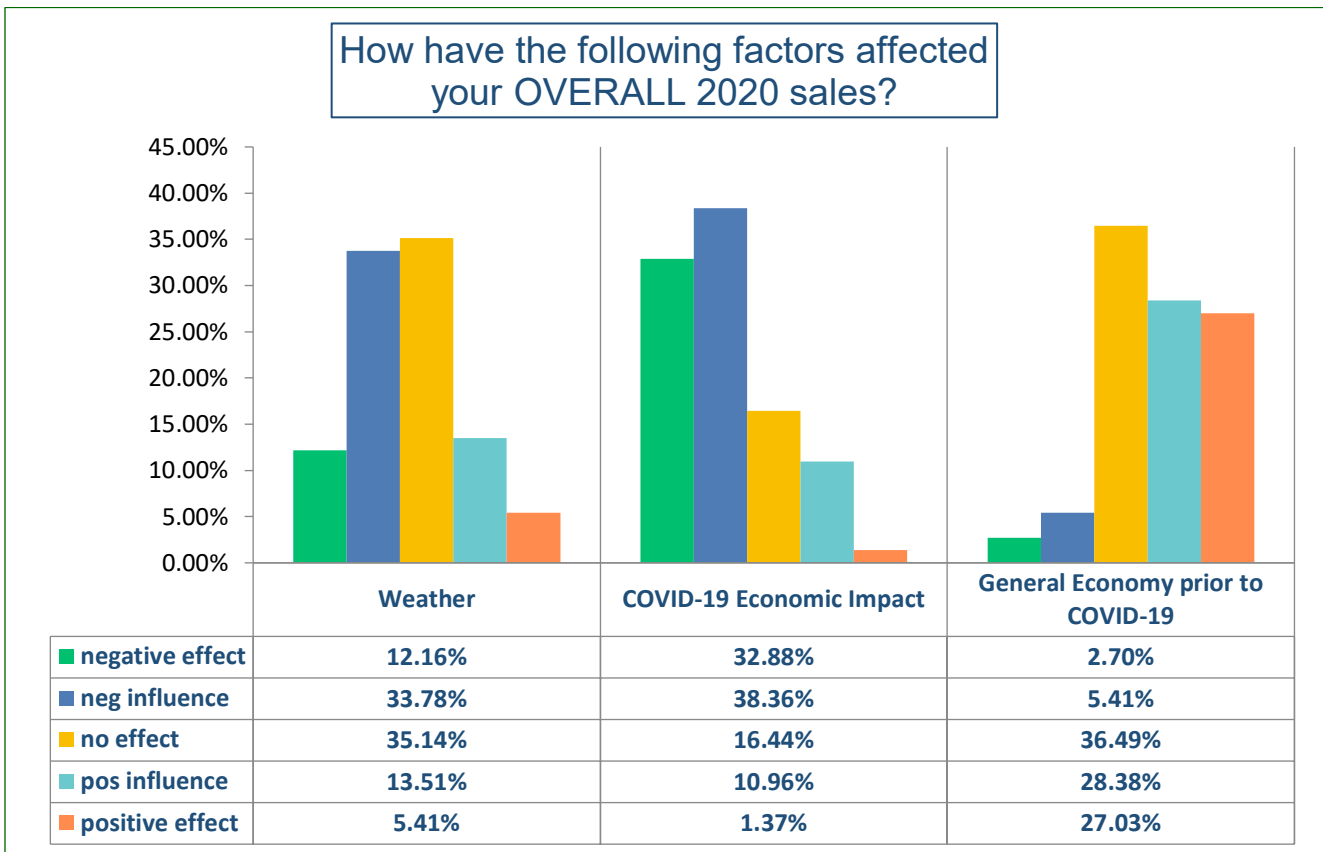
On the **BEFORE** and **AFTER** charts below, respondents were given a sliding scale that began at “0” and went to -100 on the negative side and +100 on the positive side. The answers are listed by the number corresponding to each number range.

BEFORE stay-at-home advice and orders (due to COVID-19) began in mid-March, how were your 2020 sales affected compared to the same time a year ago?

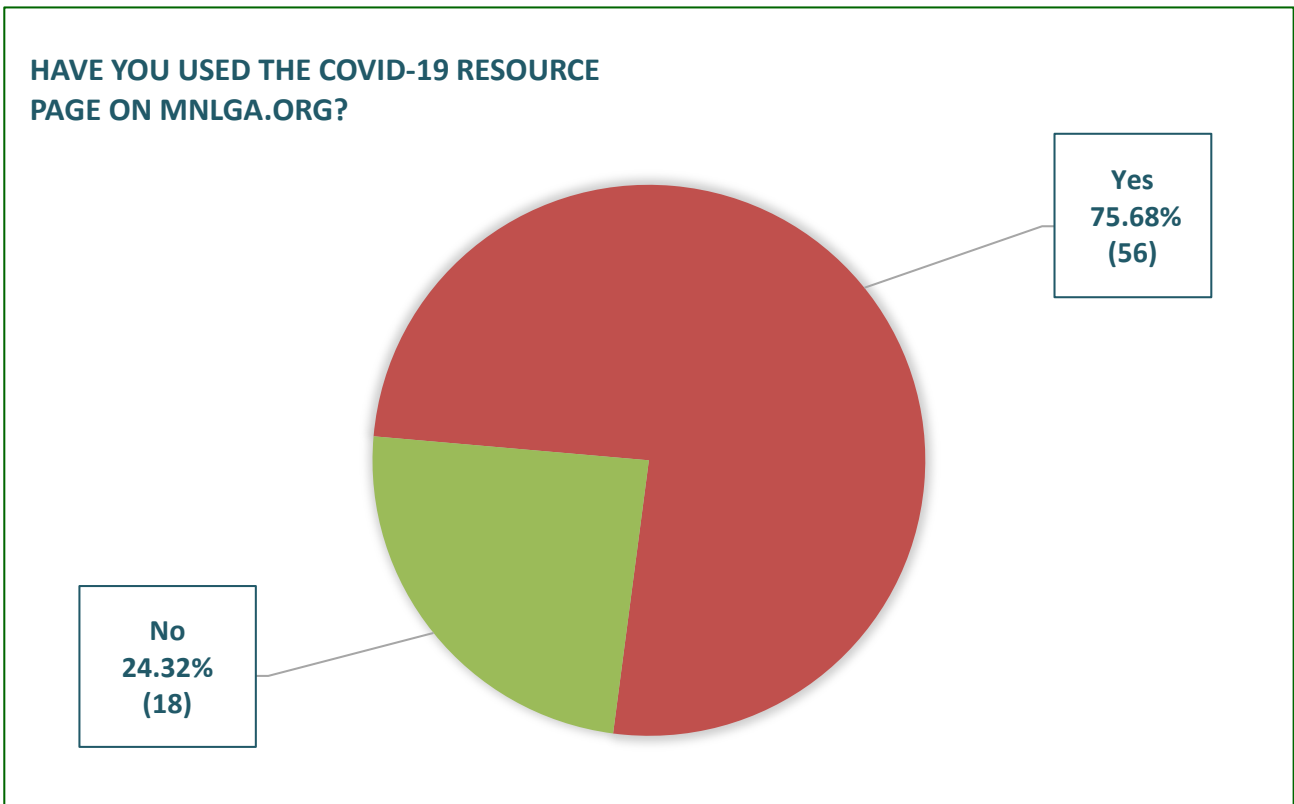
Range	# of Responses
-76 to -100	1
-50 to -75	3
-25 to -49	0
-1 to -24	3
0	23
1 to 24	24
25 to 49	6
50 to 75	9
76 to 100	5

AFTER stay-at-home advice and orders (due to COVID-19) began in mid-March, how were your 2020 sales affected compared to the same time a year ago?

Range	# of Responses
-76 to -100	4
-50 to -75	7
-25 to -49	12
-1 to -24	18
0	7
1 to 24	14
25 to 49	5
50 to 75	5
76 to 100	2



How challenging are the following issues for your business in light of the COVID-19 Pandemic?						
Category	Not Challenging	Slightly Challenging	Challenging but Manageable	Definitively Challenging	Very Challenging	Not Applicable
Cash Flow Obligations	17.57%	24.32%	33.78%	10.81%	6.76%	6.76%
Billing and Collections	27.03%	18.92%	27.03%	8.11%	2.70%	16.22%
Market Access	18.92%	27.03%	31.08%	6.76%	2.70%	13.51%
Delivering to other States	13.51%	12.16%	10.81%	9.46%	0.00%	54.05%
Social Distancing for Employees	9.46%	17.57%	35.14%	10.81%	6.76%	20.27%
Social Distancing for Customers	16.22%	22.97%	29.73%	9.46%	5.41%	16.22%
Compliance with HR Mandates - COVID-19	14.86%	21.62%	36.49%	9.46%	4.05%	13.51%
Covering Work Hours with available Employees	35.14%	8.11%	20.27%	10.81%	6.76%	18.92%
Keeping Staff Employed	43.24%	12.16%	13.51%	9.46%	1.35%	20.27%
Training Workers	25.68%	8.11%	10.81%	9.46%	6.76%	39.19%
Taxes	37.84%	16.22%	20.27%	8.11%	1.35%	16.22%



(It is interesting that at the time they answered the survey, almost 25% of the respondents had not used the COVID-19 Resource page. Hopefully this question encouraged them to make use of it)

On the final question below, there were a number of appreciative comments from the membership about the usefulness and quality of the information available on the site and in the daily and as needed updates. We wanted to acknowledge these comments here, but did not include them below as they are not germane to the “biggest challenge” question:

Please share any comments about your business's biggest challenges in light of COVID-19:

- Getting new work, accounts receivable from customers who are struggling
- Our biggest challenge is customers cutting back on project expenditures. They also act stressed and irritated more easily about small issues.
- An overabundance of caution by the leadership team within our organization has curtailed almost 1/3 of our annual expected income for 2020. We are trying to work out/implement a system where sales can occur in some capacity while still following state and organizational mandates.
- Travel in trucks together as a crew
- My biggest challenge is finding the time to study and find the financial help available while adding to our workload with new systems & cleaning and extra hours of work because some employees are afraid to come to work.
- I work alone so I am mostly unaffected, but everything takes a lot longer to navigate (buying plants and supplies) so I'm backed up with work and customers are anxious to see progress now that the weather is good. Being able to continue to work has been a gift. And I am very grateful to be a member of MNLGA... I greatly appreciate the energy to put forth so much information on such a regular basis. Well done and THANK YOU.
- Finding adequate products such as masks, disinfectants, Nitrile gloves etc.
- COVID-19 created a lot of uncertainty initially.
- The general uncertainty of the future is the biggest challenge. It is extremely hard to plan for anything right now.
- Keeping somethings in stock. Doing PPP paperwork.
- Hoping to keep employees who were initially laid off from seeking other employment. And, concerns for their safety as we reopen.
- Having too many H2A contract workers for the reduction in demand. Not enough flexibility in this program to make an adjustment.

- Most of our customers' bills from the winter and spring will be due in mid-June. There are serious concerns about certain customer segments being able to pay on time (or at all).
- As we moved to a curbside/delivery only garden center (to keep our staff safe/comfortable) the increased workload is significant. During our busiest time of the year it is extremely taxing and is taking its toll on our limited staff.
- Not knowing what is to come. Being staffed and prepared for future opportunities
- FEAR from a subset of employees.
- Cannot schedule speakers until safe to do so. Maintaining connections via the web.
- We have been only slightly affected so far. No major sales orders/contracts have canceled, a few have held back but seem committed to the project unless things drag on longer. The bigger concern is the impending recession. This cannot go on much longer or even essential businesses will hit recession fallout.
- For me, I am the sole employee of my business and prior to COVID19 completed all the work myself, from design to sourcing materials to installing to IPM and continued maintenance. When COVID19 struck, schools closed, my childcare center closed, and I could not drop off my children to relatives out of respect for their health, so I was suddenly limited to work on the day(s) my plumber husband was home to watch them. I went from working 5 days a week to working 1-2, and on weeks that his days off are raining, 0. I have 10 regular clients and 5-10 flexible, anytime clients. I had to tell most of them that I would not be able to do work for them this season and try to parcel out the days I can work for my oldest standing, most regular clients. I then had to resign myself to knowing that by the time I get through that list and can start from the top again, those properties are not going to look the way I want them to look in my care. It's frustrating to put my name on anything that is not 100%, and even worse to tell customers that I can't be there to help them, when the majority of my customers are elderly and cannot keep up with their gardens on their own.
- Planning for future openings
- Knowing what is legal to do and not to do. Keeping everyone safe, relaxed and enjoy gardening
- I think we will be ok in the short term, but I am concerned about the economy going into the fall
- A positive effect: getting from job to job is much easier and faster with basically no traffic
- Retail customer's demands and expectations with our limited staff and government restrictions. Planning ahead, not knowing what the next change will be. Stress of wondering what financial options we have or will get since we are 'essential' and not "forced" to close.

- Biggest challenge is still finding help ... even with a large portion of the Maryland workforce being unemployed. Second challenge is the slowdown of sales with April being down 70%.
- The Unknown has been the biggest challenge and the trickle-down effect it has had.
- Not knowing how to plan for what's next.

- Uncertainty whether the Governor might shut us down; concern about my employees getting sick; concerns about customers cutting back on services

- Getting residential customers to agree to get the work done

- Lack of orders and customers inability to pay in a timely manner.

- New housing market construction shut down having a huge negative impact on suppliers and workers

- Ask again in 2 months - concern relates to customers paying invoices

- This is more of a comment on how well MNLGA has kept us informed. My biggest resource during this pandemic has been MNLGA. Kudos, and thanks

- My store is in a mall and has been closed since Mid-March. Lost revenues and keeping existing inventory in sellable condition is also a challenge. Starting up again without capital will be difficult.
- Trying to apply for all the disaster loans and grants. Contacting all the lenders and vendors to defer payments. Trying to pay staff.

- Customers are wary