



**Axiom 2022  
Compost Report  
Managed Turf  
Non-shade Nursery**

**June 1, 2022**



## Task 3: Customer Insights

### Key Questions to Answer

1. What do sport turf managers, sod producers and non-shade nursery operators think about humus, compost, soil amendments, bio-stimulants?
2. How and why is organic important?
3. How and why is sustainability important?
4. What other values are important?
5. Where do they buy?
6. In what quantity and what volume do they buy?
7. How much do they pay?
8. Where do they learn about new products?
9. What sources of information are most influential when making purchase decisions?
10. What products do they presently use? Why?
11. How do they apply these products?
12. Are regional product suppliers important? Why?
13. Are they willing to pay more for organic, sustainable products?

### Axiom Actions

1. Create 25-question online survey
2. Distribute the survey to sport turf managers, sod producers and non-shade nursery operators
3. Complete focus groups to review quantitative findings

# Executive Summary

## Compost and Biological Soil Amendment Perceptions

- 86% of online respondents say compost and biological soil amendments are important.
- Compost and biological soil amendments are the second and third most mentioned product types after fertilizer by online survey respondents – 59% and 36% use dry/ liquid compost and 36% apply biological soil amendments, respectively.
- 69% of online respondents say that compost and other biological soil amendments improve soil and plant health.
- All focus group respondents saw compost as important – particularly in new construction applications where heavy clay needs to be broken up and when planting trees, shrubs and other ornamental plants. Respondents asked for a definition about “biological soil amendments.
- Product cost, smell and shipping cost were cited by online respondents as top 3 negatives. Top 3 negatives mentioned by focus group respondents included: detailed nutritional information, uncomposted weed seeds and questionable/variable inputs.

# Executive Summary

## Compost and Biological Soil Amendment Trial and Purchase

- When asked what benefits would convince online respondents to try compost and biological soil amendments, 68% say reducing overall fertilizer needs, 44% say easier application and 38% say added nutrition.
- Focus group respondents were quite skeptical about reducing fertilizer needs and added nutrition because of scant nutritional labeling information and the associated risk.
- Focus group respondents also focused on consistency of particle size, nutrition, and source inputs as being highly important purchase factors.
- 67% of online respondents buy most of their crop inputs from distributors. All but one focus group respondent buy compost from a local distributor.
- 31% of online respondents make their own compost and soil mixes. Only 1 focus group respondent makes its own compost.
- The average annual estimated budget for fertilizers and soil amendments for online respondents is \$30,000.

# Executive Summary

## Trusted Information Sources that Impact Trial and Purchase

- Top 3 trusted information sources for online respondents were within 1% of each other and include: #1 peer/colleague/employee (27%); #2 sales rep/supplier/marketer (26%); and #3 university/USDA research trials (25%.)
- Nearly all focus group participants commented on the importance AND lack of university and USDA research on compost and soil amendments. They say they need this information before making any changes to their agronomic programs.
- Top 3 information sources to learn about new products for online respondents include: #1 sales/rep or agronomist (73%); #2 peers (66%); and trade shows (60%.)

# Executive Summary

## Organic, Sustainability, Environment Friendly

- 39% of online respondents say that 5-25% of their fertilizer/soil amendment budget is spent on organic products.
- Sustainable and eco-friendly practices important to online respondents – 33% say highly important and 55% say somewhat important. Only 3% say not important.
- Most focus group respondents said they were driven to adopt these because of end use citizen user concerns and because it was the “right thing to do.”
- One-third of online respondent are willing to pay more for organic eco-friendly products, and 22% say their customers are willing to pay more.
- Nearly all focus group respondents considered it highly beneficial to be able to highlight to citizen constituents their use of organic products. Most receive regular calls from concerned citizens about any crop inputs that are “in a jug” and “applied with a sprayer” because they are perceived as chemical in nature and dangerous.

# Executive Summary

## Application Information

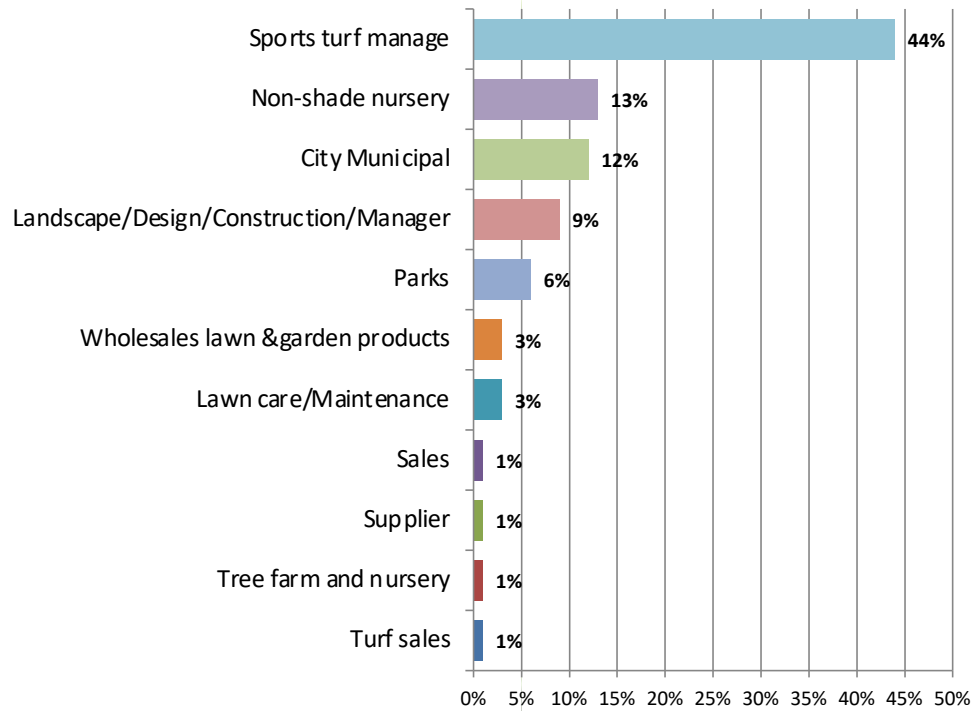
- 65% of online respondents apply mostly dry fertilizers and soil amendments. Only 1% reports applying most liquid. But 34% say they apply a combination of both.
- Nearly all focus group participants apply dry fertilizers for the following reasons: concern from citizen constituents about any liquid inputs being chemical in nature; greater control of application rates; and lower reduce risk injury to turf, trees and ornamentals.
- 81% of online respondents apply fertilizers and soil amendments with spreaders. 44% use sprayers and manual labor.
- When asked about the possibility of reducing fertilizer applications by using more compost, nearly all focus group respondents commented that they are unlikely to do this because of the massive amount of compost that they'd need to apply and the lack of staff to apply it.
- All focus group participants thought it was important to apply compost to planting areas for trees, shrubs and other ornamentals.

An aerial photograph of a golf course, showing green fairways, sand traps, and various trees. A semi-transparent teal rectangular box is centered over the image, containing the text "RESEARCH RESPONSES" in white, bold, uppercase letters.

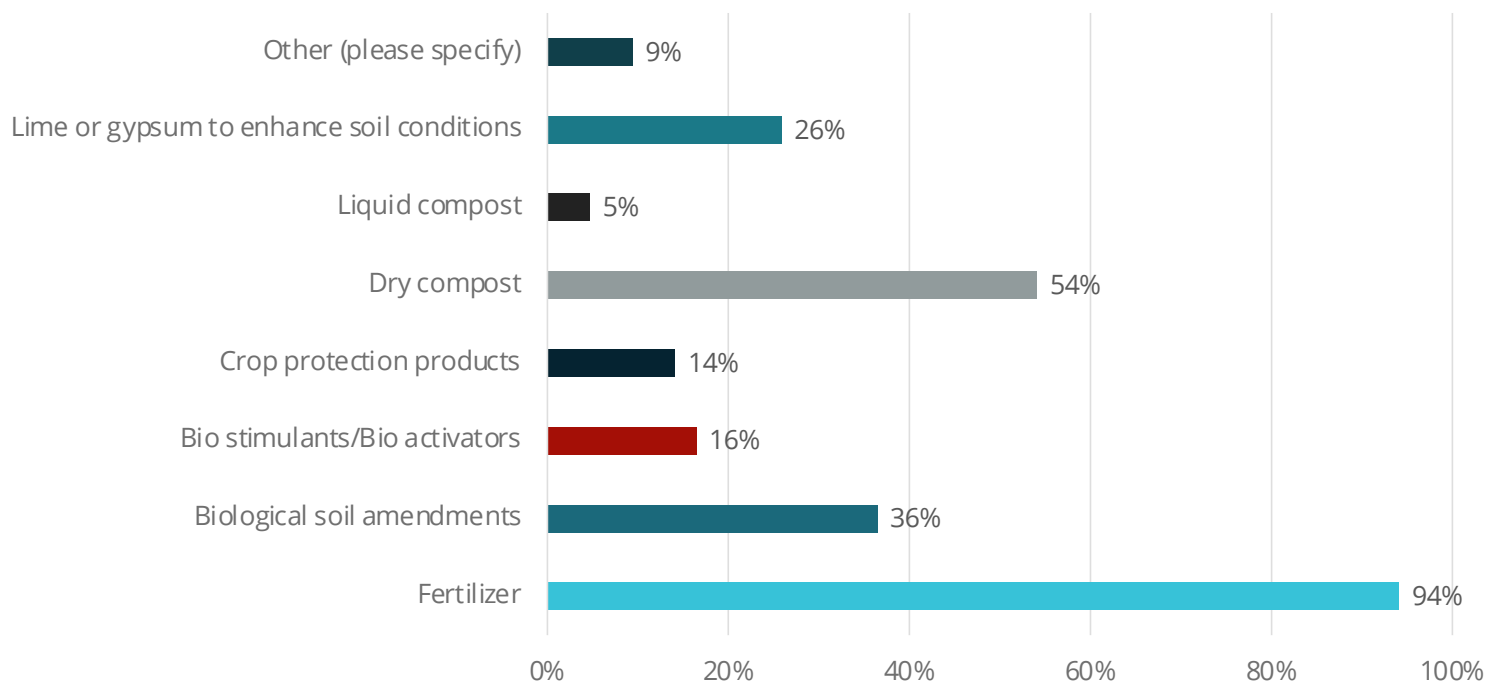
# **RESEARCH RESPONSES**



# What is your business?



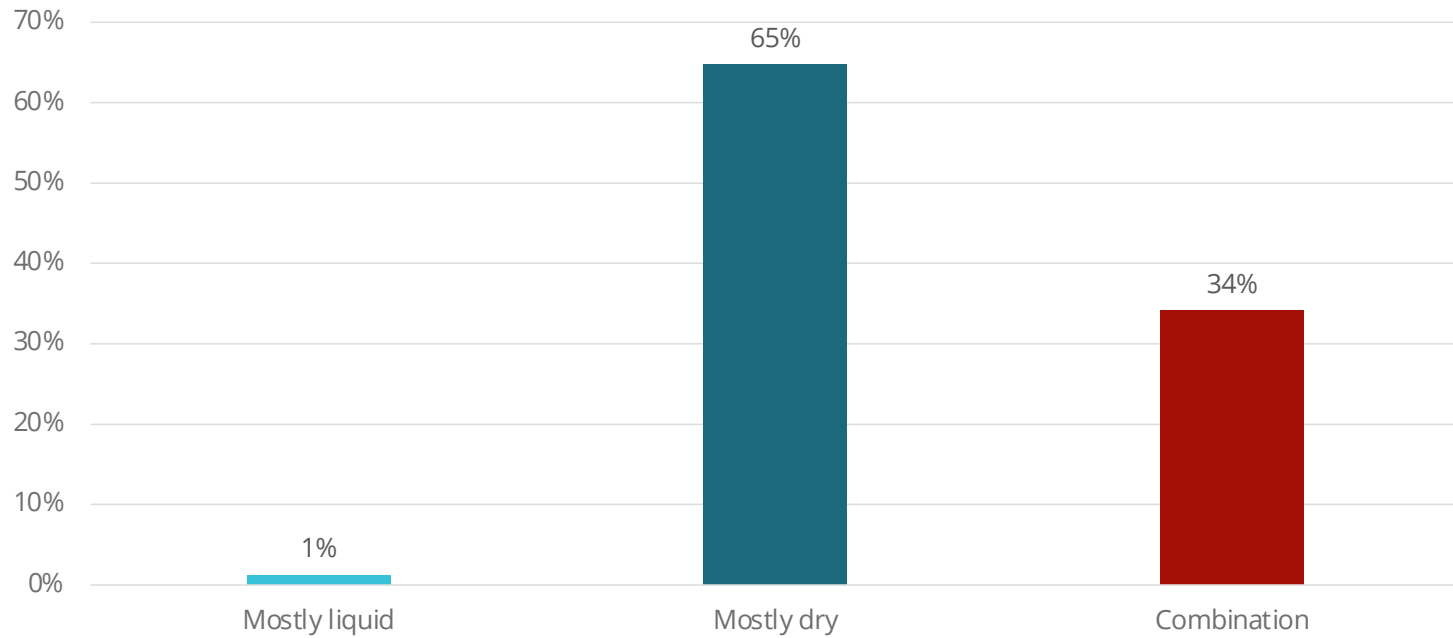
# What types of products do you typically use in your business? (Check all that apply)



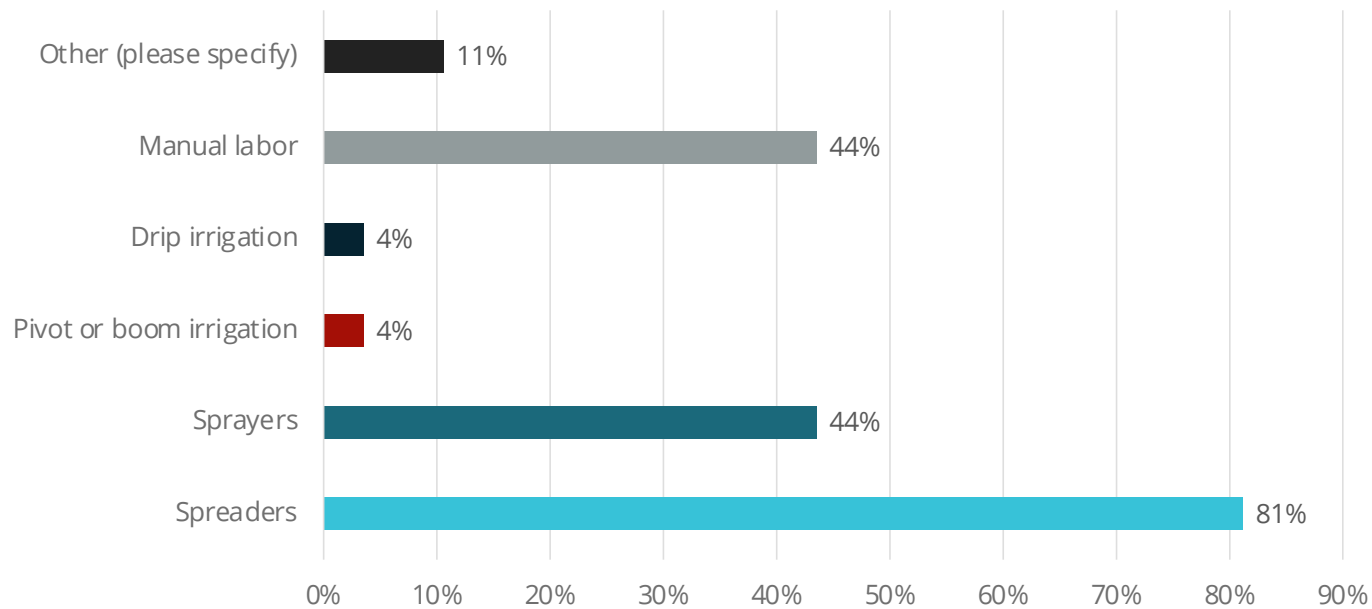
### Other Responses

- Fungicides
- Grass seed
- Leaf mulch
- Mycorrhizae
- Peat moss and various mulches
- Sulfur, aluminum, chelated iron
- Topsoil

# What form of fertilizers and soil amendments do you apply?

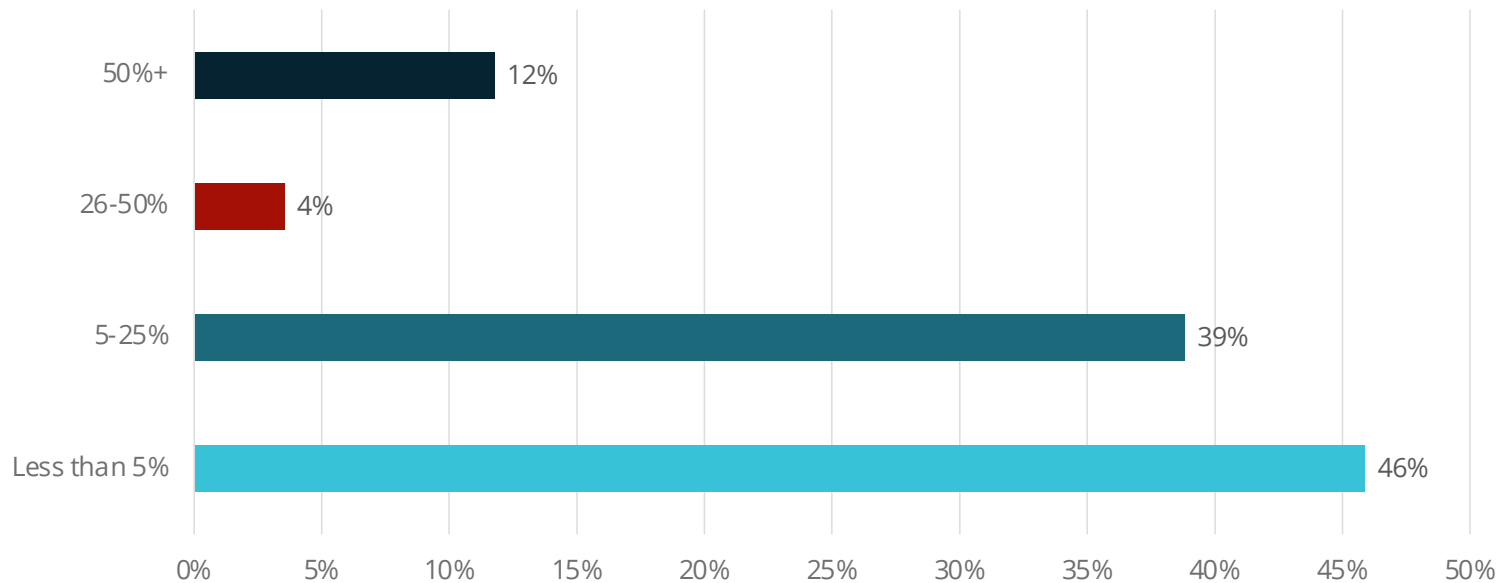


# How do you apply fertilizers and soil amendments? (Check all that apply)

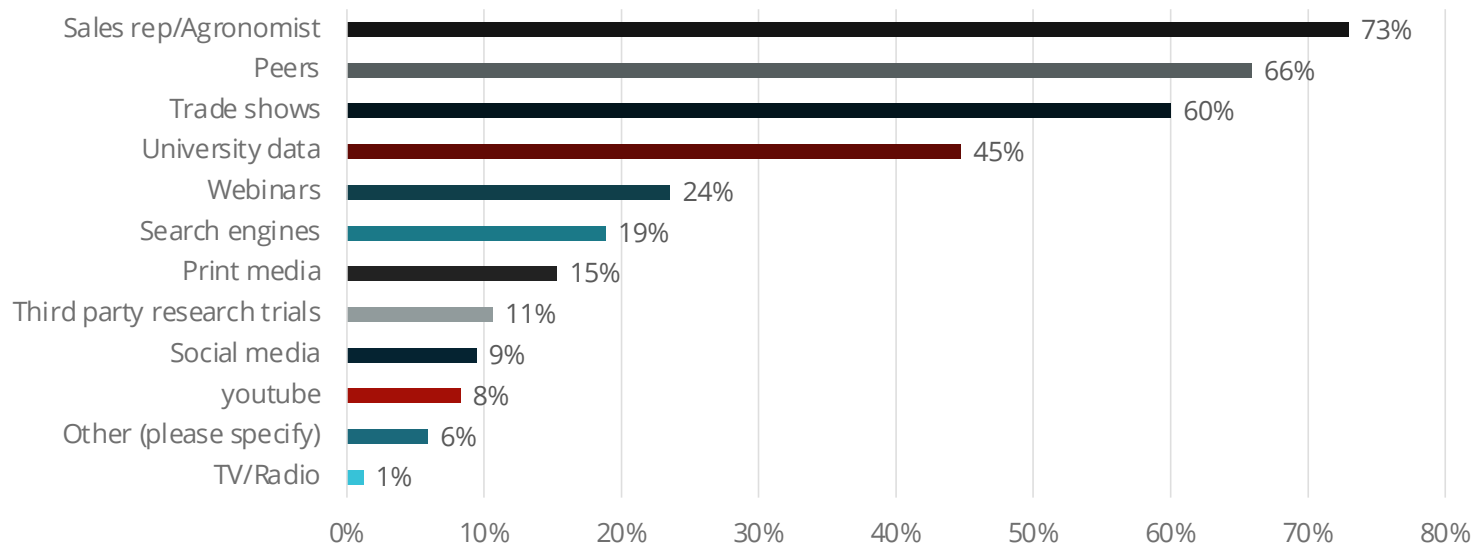


- Other Responses**
- Back-pack sprayer
  - Banding field trees, manual top-dress containers
  - Irrigation Injection
  - Machine loading and application
  - Media incorporated
  - Mix into soil mechanically after spreading

# What % of your fertilizer/soil amendment budget is spent on organic products?

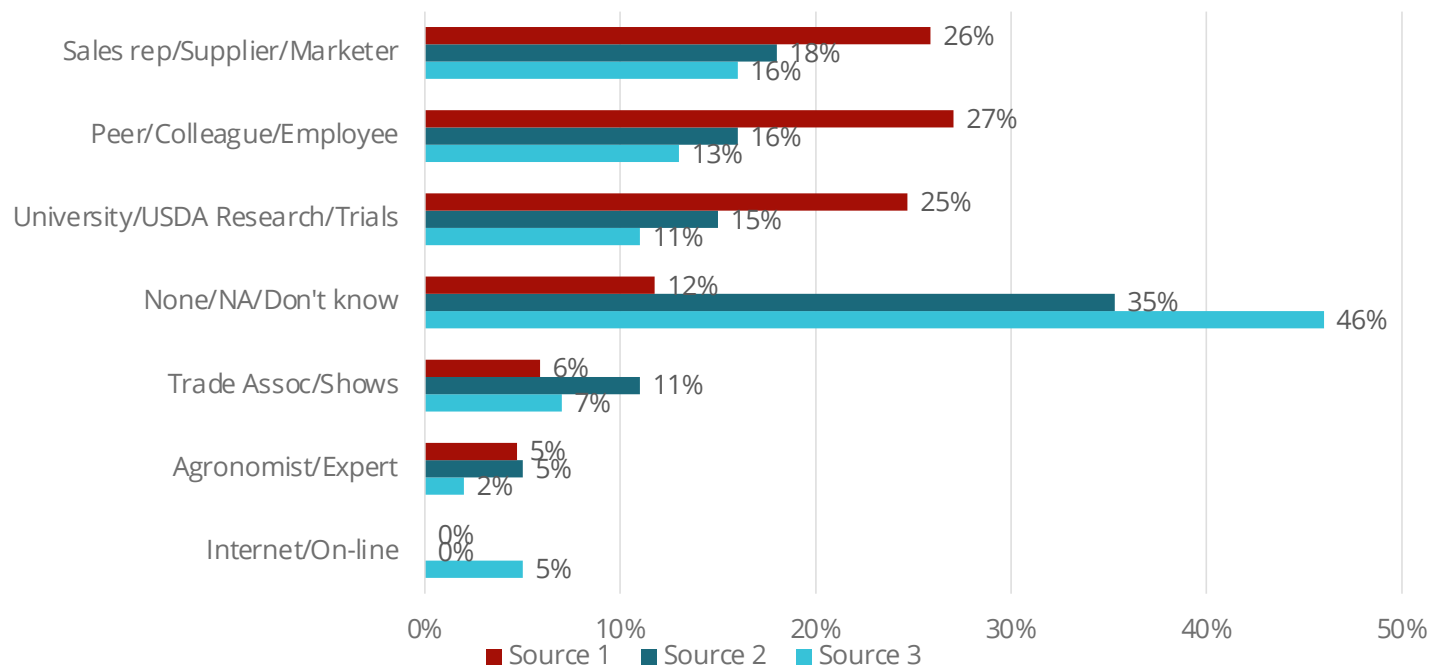


# Where do you typically learn about the new products you use in your business? (Check all that apply)

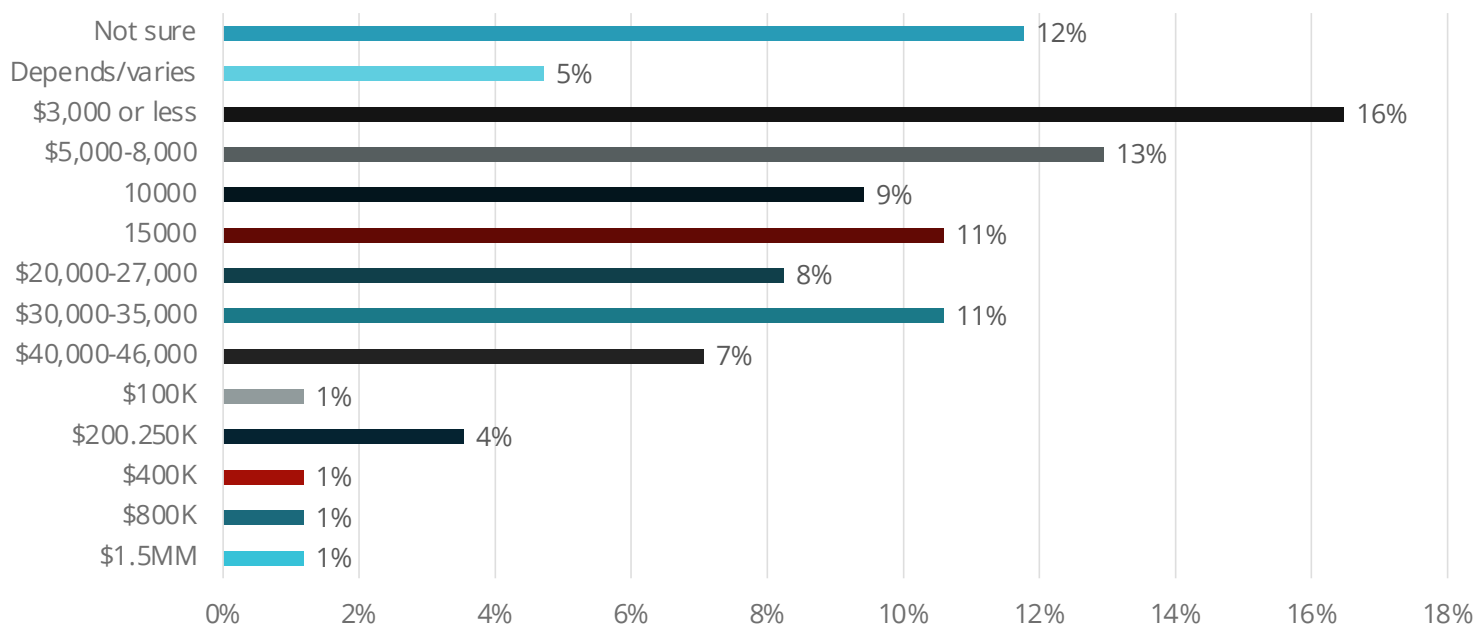


- Other Responses**
- Associations
  - Industry seminars
  - Trade newsletters, conferences
  - Workshop (training)

# What three trusted sources would cause you to trial a new product?

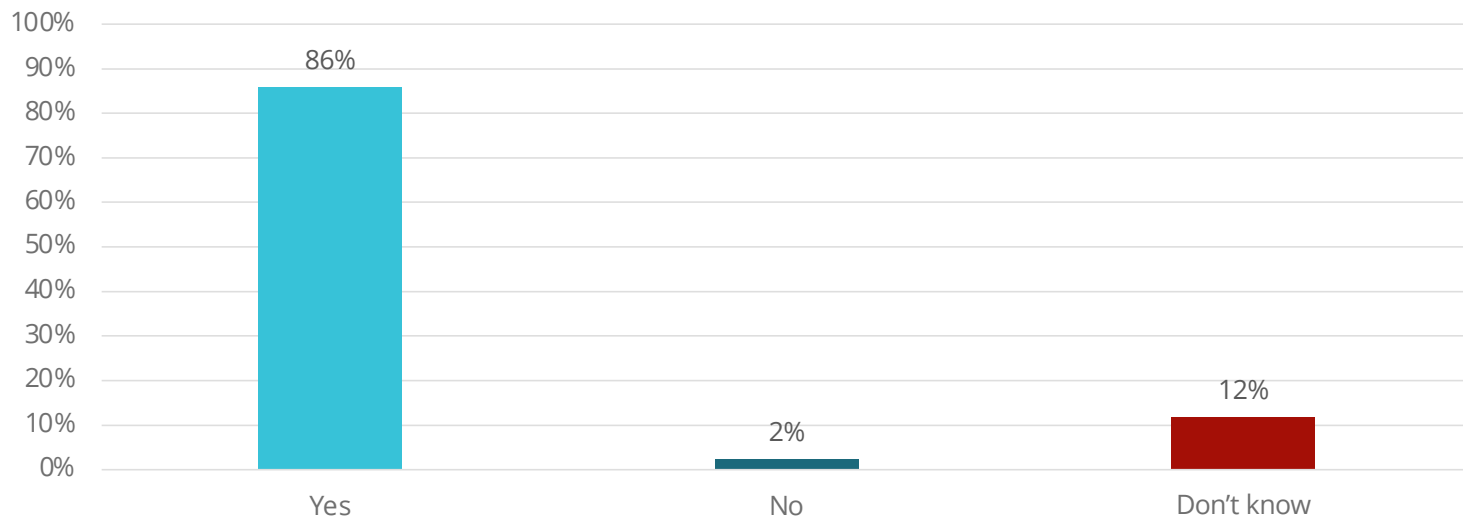


# What is your estimated annual budget for fertilizers and soil amendments?

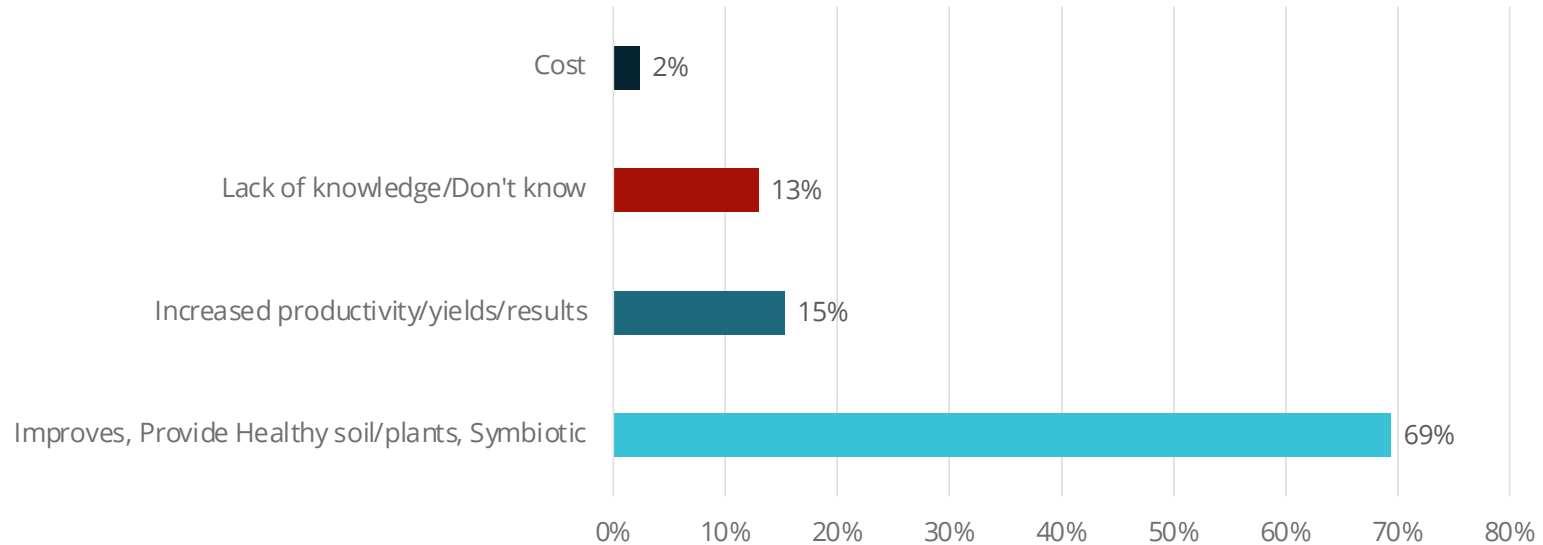




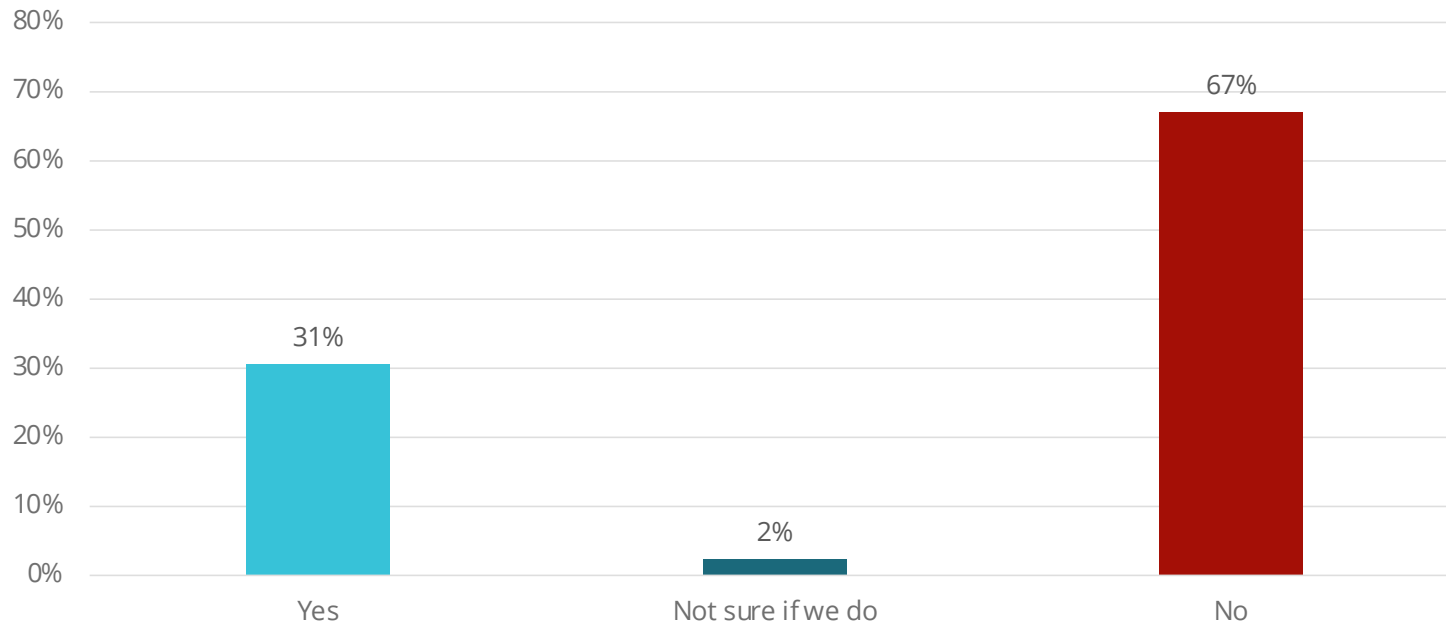
# Do you feel compost and biological soil amendments are important?



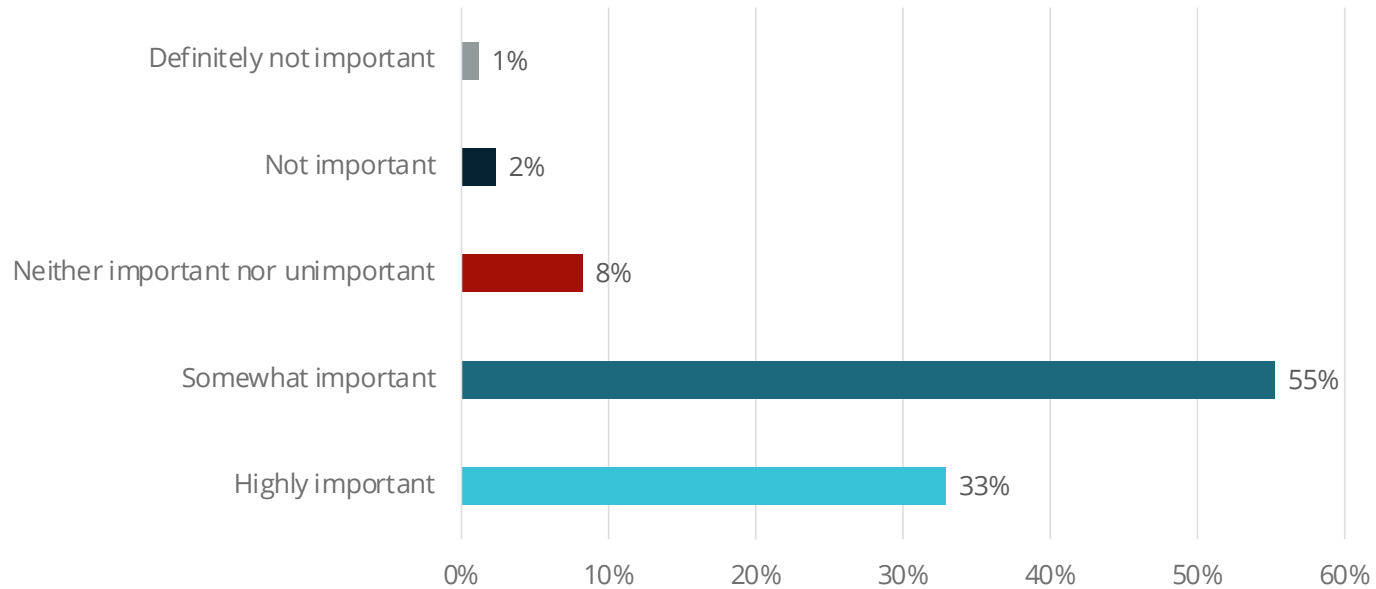
# Why do you feel the way about compost and other biological soil amendments?



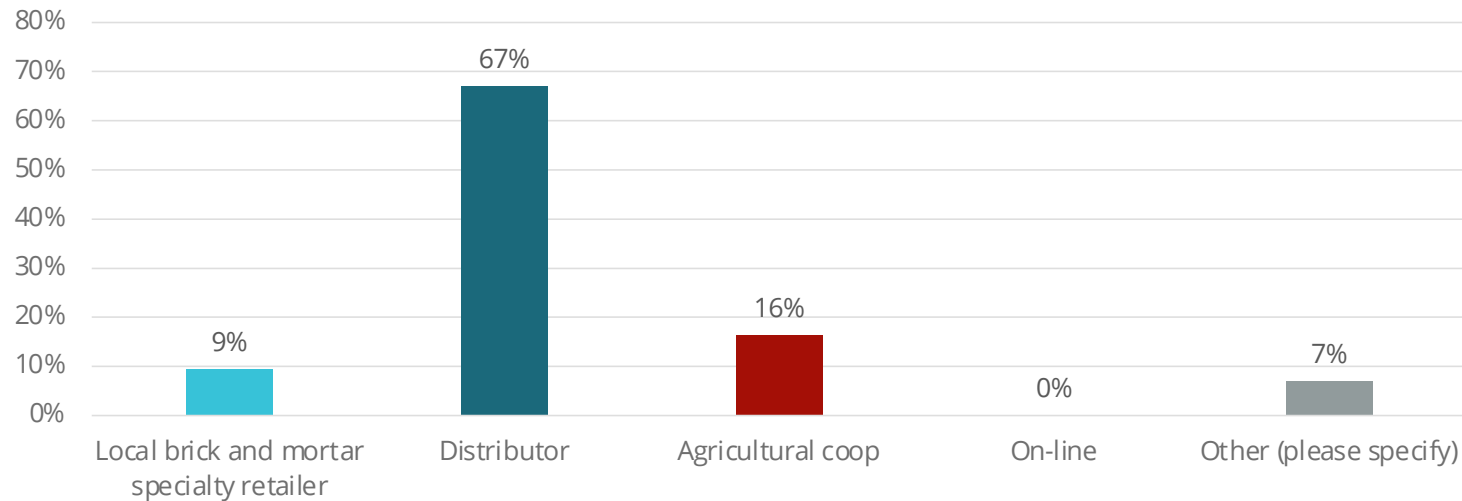
# Do you make your own compost/soil mixes?



# How important are sustainable and eco-friendly practices to your business?

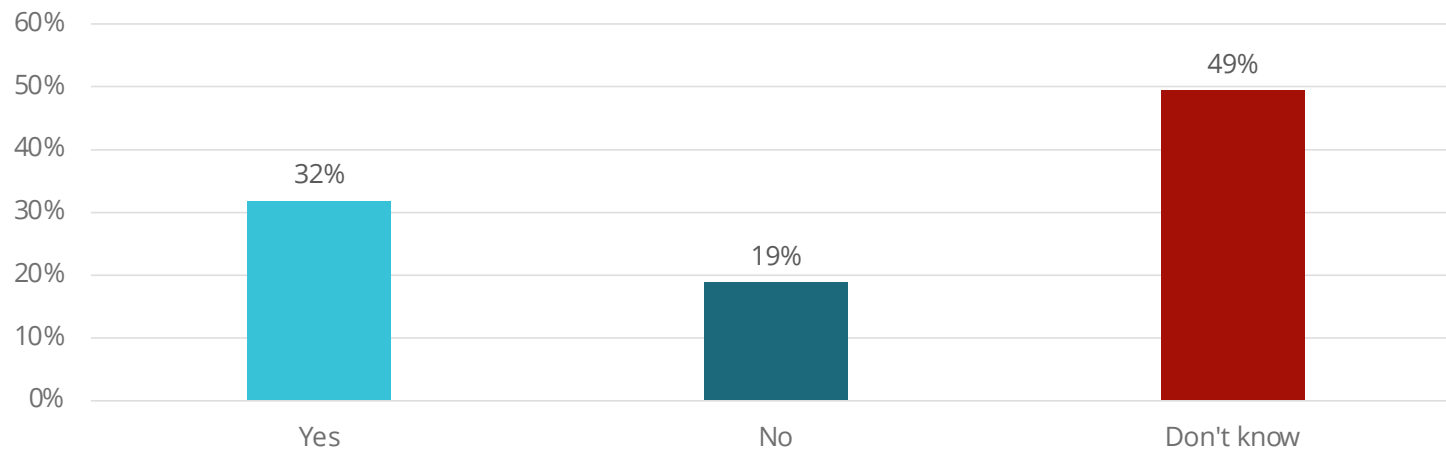


# Where do you buy most of your fertilizer and biological soil amendments? (Check one)

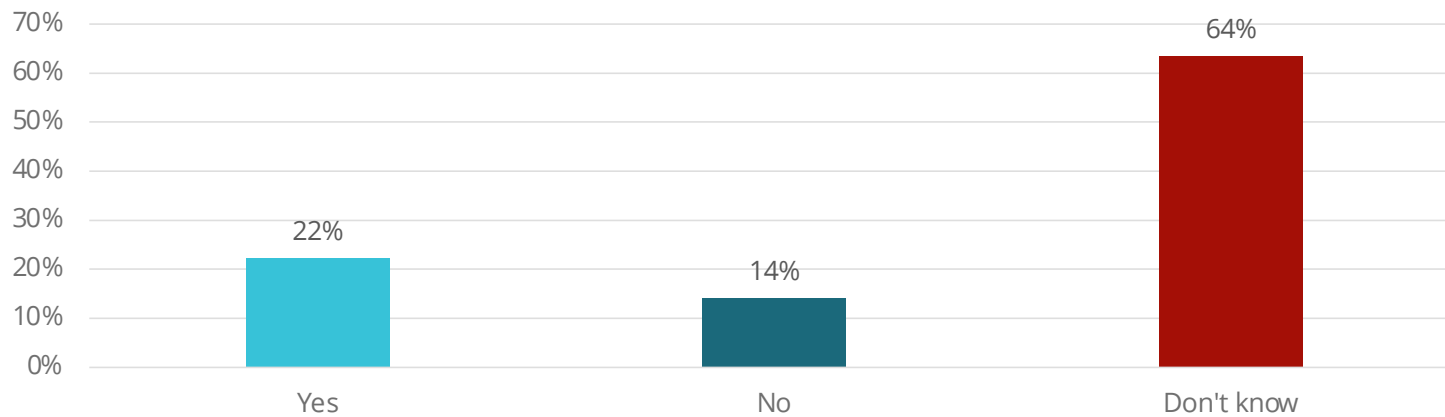


- Other Responses**
- City of Kenosha
  - Garden centers
  - Cedar Rapids Linn County Solid Waste Agency
  - Direct from the source/mfr

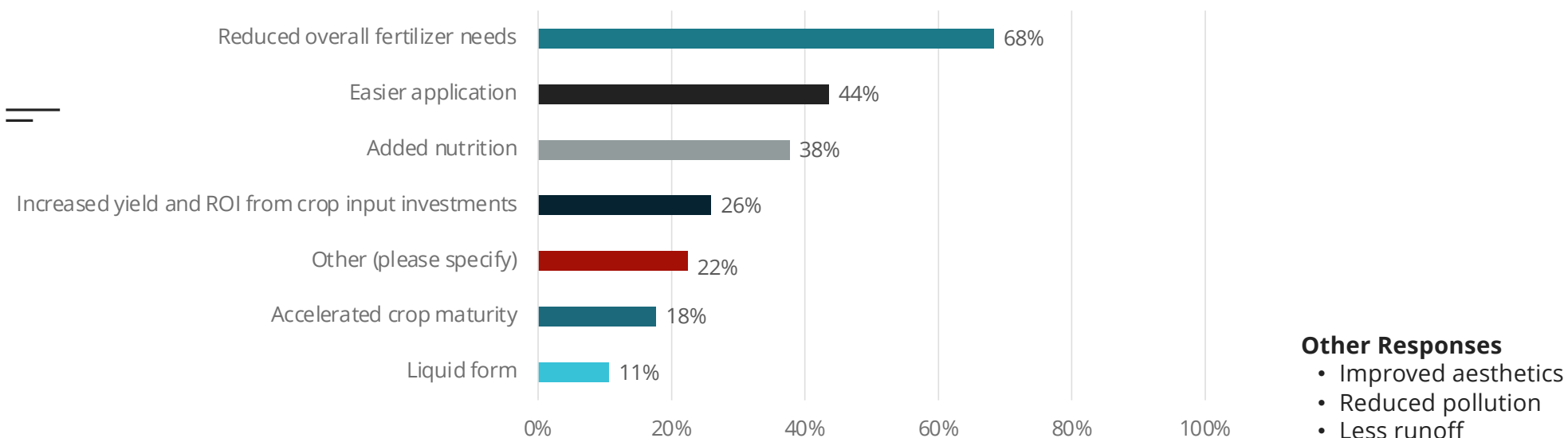
# Is your business willing to pay more for organic eco-friendly products?



# Are your customers willing to pay more for organic eco-friendly products?



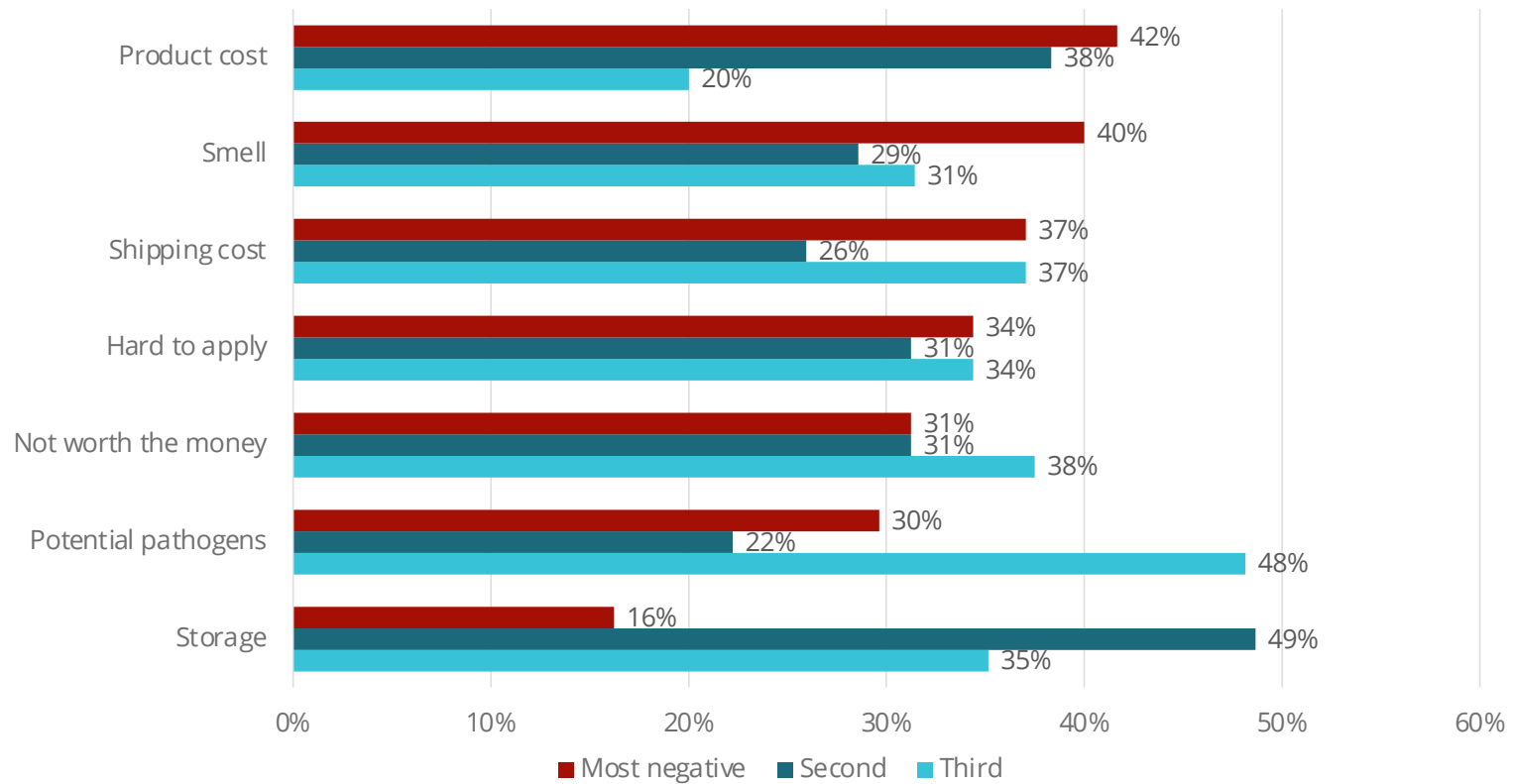
# If you don't apply compost and biological soil amendments, what benefits would convince you to try them? (Check all that apply)





# As you think about compost and biological soil amendments, what are the negatives?

(Check the 3 most important negatives)





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