



NATIONAL
ASSOCIATION OF
**LANDSCAPE
PROFESSIONALS**
Foundation

Landscape Industry Careers Survey
Key Findings
June 2015

www.landscapeprofessionals.org/foundation

BACKGROUND & METHODOLOGY

Background

The National Association of Landscape Professionals Foundation is looking for ways to attract an educated workforce into the landscape industry. The Foundation wanted to conduct research to better understand the career opportunities and needs of landscape industry firms, including the number and mix of positions (particularly management), education needs, and opportunities for long-term career growth. The research was conducted by The Stevenson Company, a nationally-recognized market research firm, in the winter of 2015, via an online survey and telephone interviews with representatives from a sample cross-section of industry companies.

Key Objectives

The primary goals of this research is to understand the following:

- **Employee Compensation**
 - Minimum, average and maximum compensation by position
 - Benefits (health and retirement) by position
- **Employee Education**
 - Recommended minimum education for executives/management
 - Typical education by position
 - Respondent experience: education and professional certifications
- **Prospective Employment**
 - Ease of finding qualified applicants by position
 - Hiring outlook
 - Advice: Approach to entering the industry, education, training, how to overcome perceived stereotypes
- **Demographics**
 - Respondent position & tenure in industry
 - Firm income
 - Firm channel mix

The following report is a presentation of the key findings from the research. The full report is available to NALP members and NALP Foundation donors/supporters. Please contact Foundation Director [Anna Walraven](#) for more information. For media inquires, please contact NALP PR Director [Lisa Schaumann](#).

Methodology & Sample Plan

An online study was by the Stevenson Company, conducted with PLANET (now NALP) members. National Association of Landscape Professionals (NALP) Foundation emailed survey invitations to those companies with less than 100 employees. The Stevenson Company (TSC) called, recruited and sent a link to those companies with 100 or more employees. TSC also called to remind, recruit, and emailed a link to fill the remaining completes needed for the under 100 employee companies.

Those who responded to the Foundation email received a \$25 gift card. Those who were recruited by phone received a \$50 gift card.

Respondents were screened to meet the following criteria:

- Person able to provide information about types of positions and their compensation structures
- Has revenue in the landscaping fields covered by PLANET (now NALP)

The table below shows the completed surveys by size and type of firm. Note that many companies overlap type. Respondents were assigned to the type for which they have the highest percentage of revenue. In case of a tie, they were assigned randomly to a type category when results are reported without allowing category overlap.

	Less than 10 Employees	10 to 99 Employees	100 or more Employees	Total
Design or Build	10	41	4	55
Landscape Management	10	34	18	62
Lawn Care	22	29	8	59
Other	4	9	6	19
Total	46	113	36	195

Methodology & Sample Plan – Follow-Up

After reviewing the results of the study, NALP was interested in collecting additional data on sales positions among member companies.

TSC and NALP emailed survey invitations for a brief (less than 5 minute) follow-up survey to the 195 NALP (formerly PLANET) members who responded to the original study.

44 member companies responded. Those who responded received a \$5 Starbucks e-gift card.

The table below shows the completed follow-up surveys by firm size:

	Total Interviews
Less than 10 Employees	8
10 to 99 Employees	27
100 or More Employees	9
Total	44

Note: Due to very small sample sizes by size of company, statistical significance testing between firm size is excluded.

SUMMARY OF FINDINGS

Key Findings

Executives and Management Positions are rated the hardest positions to fill.

- This is particularly true of the small (less than 10 employees) and medium sized (10 to 99 employees) firms.

4 in 10 interviewed expect to hire management positions in the next year.

- On average, those hiring expect to hire 1 to 4 management positions in the next year.
- Expected executive hiring is much weaker, with less than 1 in 10 expecting to hire an executive in the next year.

Most executives and management are paid a yearly salary, have health insurance and are offered a retirement plan. All compensation increases with company size.

- Salary versus hourly wage increases with company size, although the majority of all firms offer a salary.
- Average salaries offered increases with company size.
- For executives, average salaries range from \$54,000 to \$115,000.
- For management positions, average salaries range from \$36,000 to \$59,000.
- Receipt of health insurance and retirement plans increases with company size. The majority of medium and large (100 or more employees) offer these benefits, while small firms do not.

A 4-year college degree is the most frequently recommended, particularly for executives and among companies with 10 or more employees.

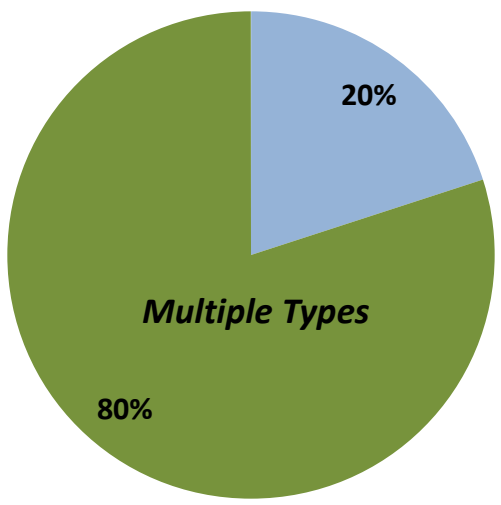
- An associate's degree or some college is the least amount of education recommended.
- Half or more who responded to the survey have a college degree or higher.

Survey Industry Overview

Firm Job Mix

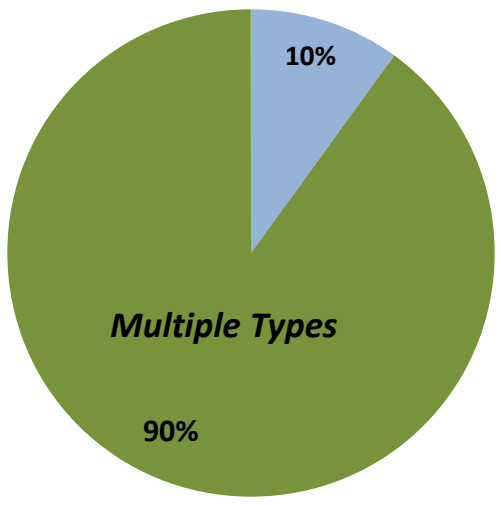
➤ The vast majority of all landscape industry firms perform multiple types of jobs rather than specializing in only one type.

**Job Mix – Multiple Types
Less than 10 Employees**



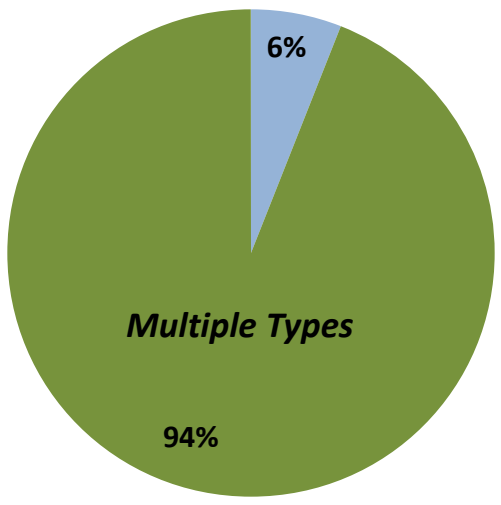
n=46

**Job Mix – Multiple Types
10 to 99 Employees**



n=113

**Job Mix – Multiple Types
100 or More Employees**



n=36

■ All one type ■ Multiple types

Q. What % of your total revenues would you say are from the following?

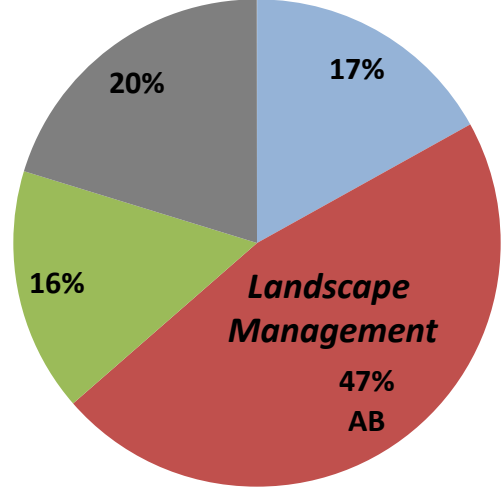
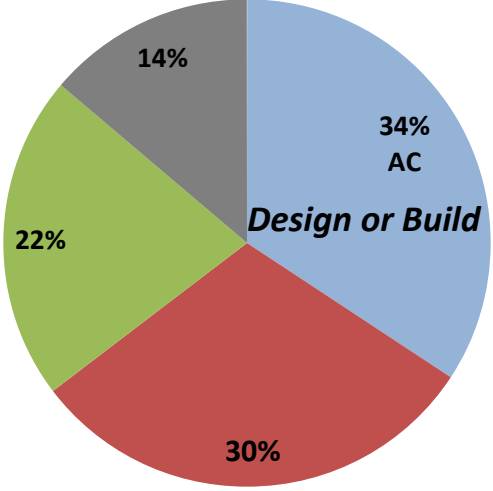
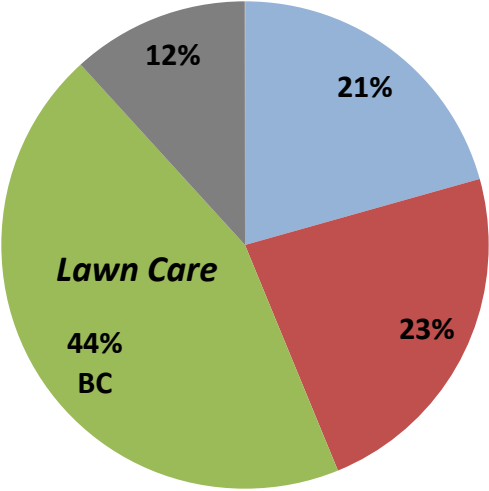
Firm Average Job Mix

➤ There are significant differences in job mix by size of company. The smallest companies are most concentrated in Lawn Care, the medium companies most concentrated in Design or Build, and the largest companies most concentrated in Landscape Management.

Average Job Mix
Less than 10 Employees

Average Job Mix
10 to 99 Employees

Average Job Mix
100 or More Employees



■ Design or Build ■ Landscape Management ■ Lawn Care ■ All Other

n=46

n=113

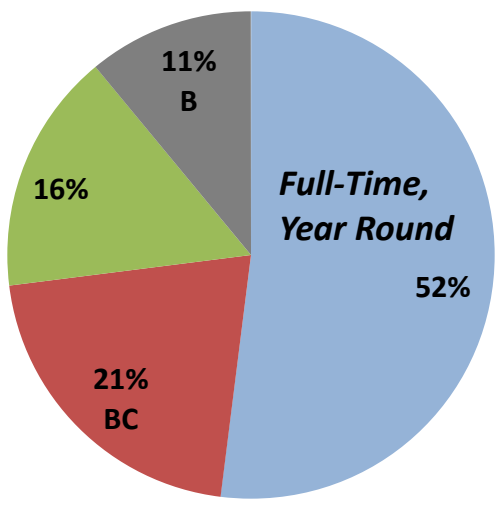
n=36

Q. What % of your total revenues would you say are from the following?

Firm Employee Mix

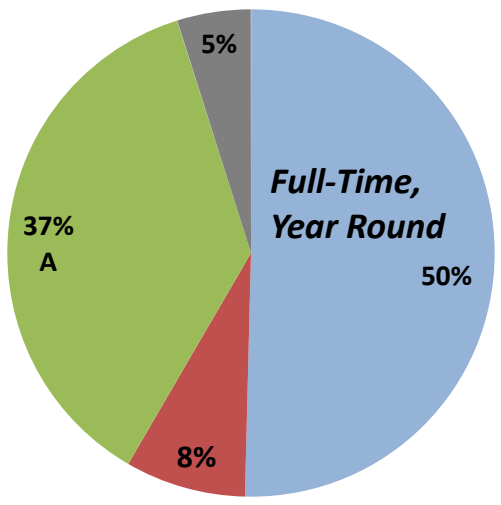
➤ About half of employees are full-time, year round employees. Companies with 10 or more employees have a higher mix of full-time seasonal employees than those with less than 10 employees. These smallest companies have a higher mix of part-time, year round employees.

Average Employee Mix
Less than 10 Employees



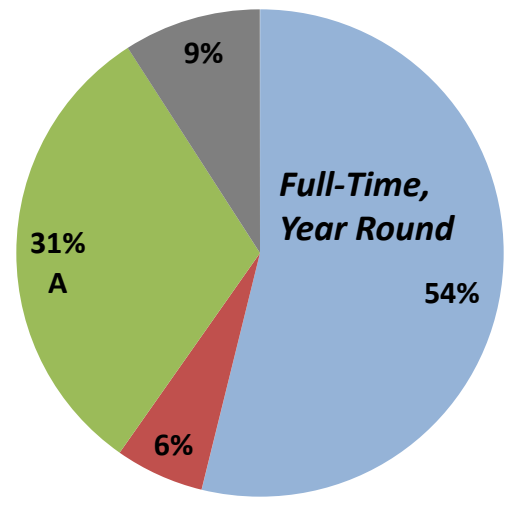
n=46

Average Employee Mix
10 to 99 Employees



n=113

Average Employee Mix
100 or More Employees



n=36

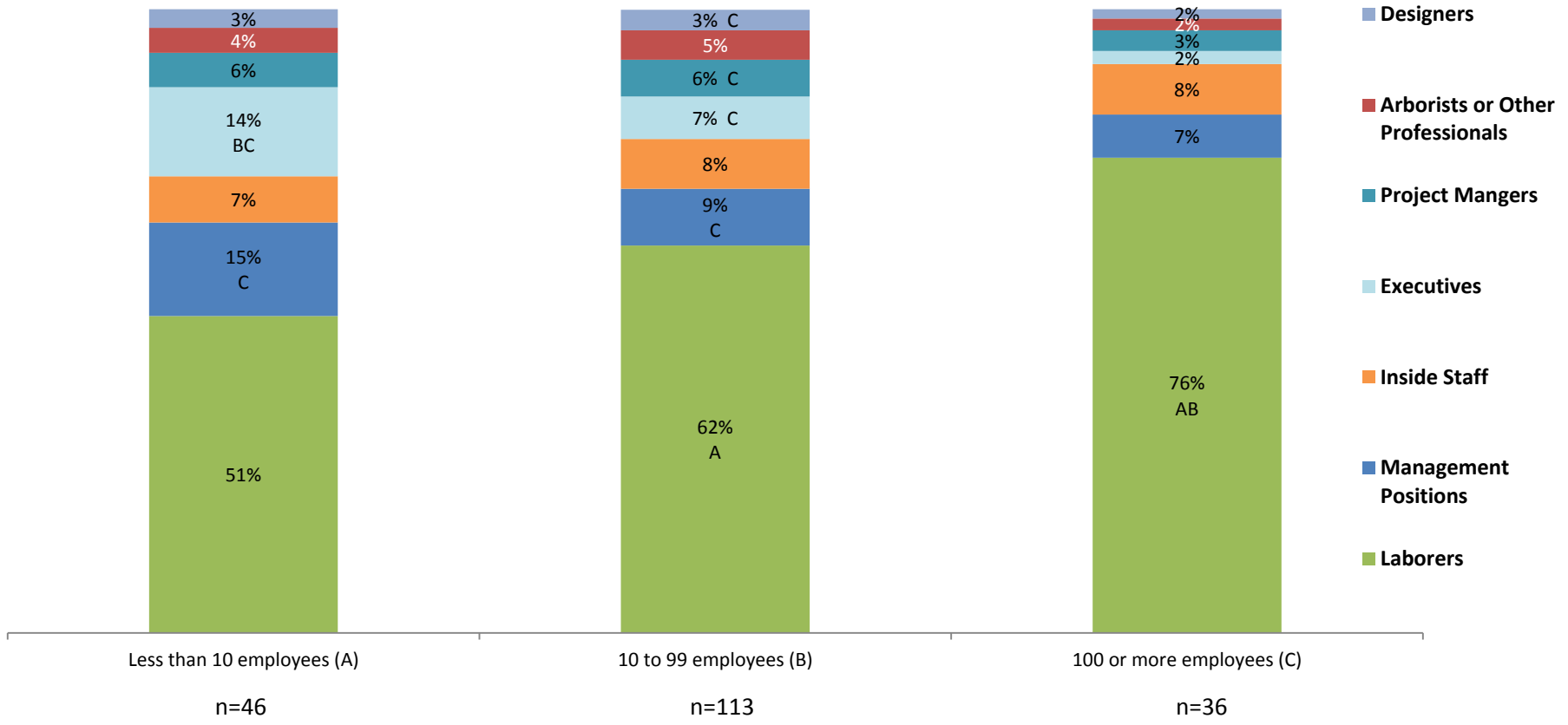
■ Full-Time, Year Round ■ Part-Time, Year Round ■ Full-Time, Seasonal ■ Part-Time, Seasonal

Q. How many employees does your company have?

Firm Position Mix

➤ Half or more of all company positions are laborer positions. Laborer concentration of positions increases with the size of the company, primarily at the expense of executive and management positions.

Average Position Mix
By Company Size

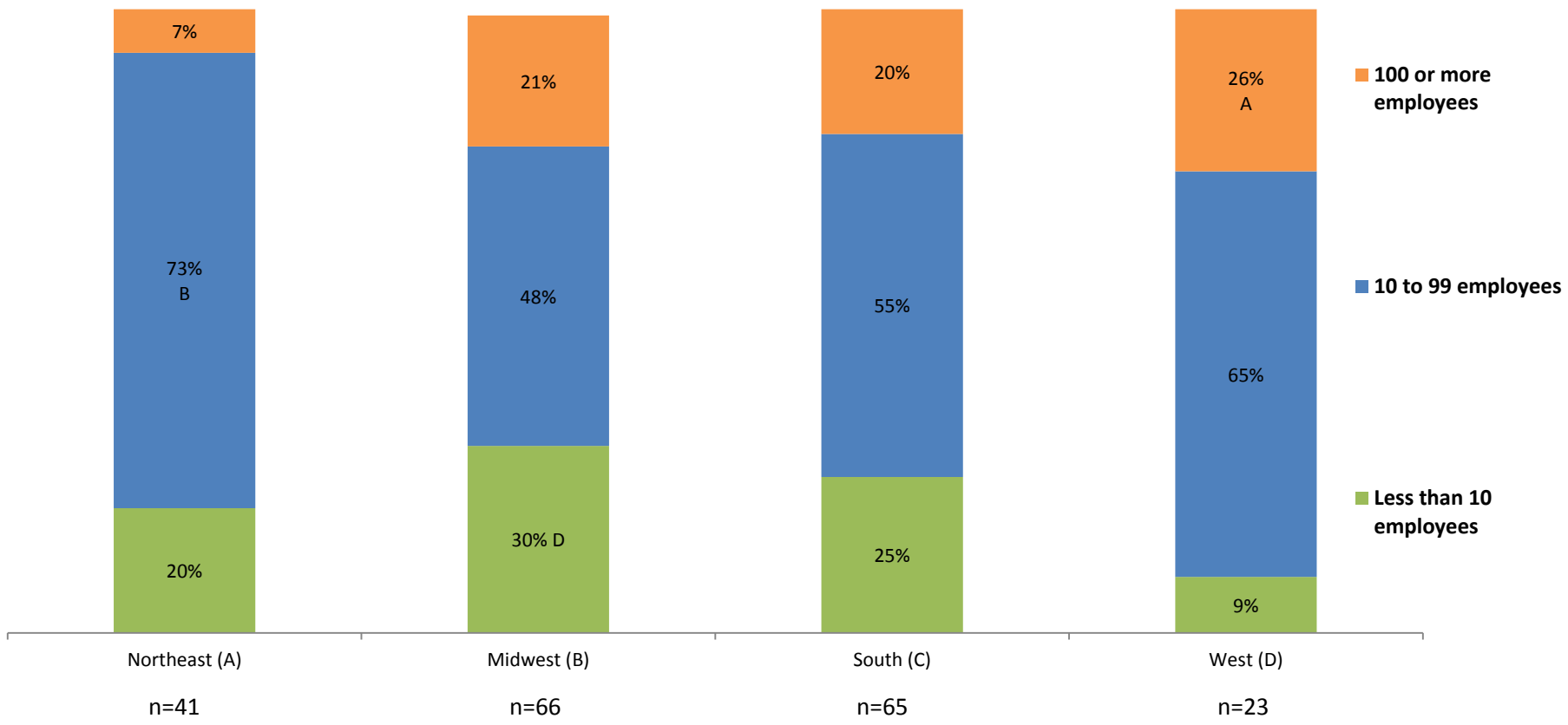


Q. How many employees does your company have?

Size Mix by Census Region

➤ Size of the company varies by census region. The smallest companies (less than 10 employees) are directionally more common in the Midwest and South.

Average Position Mix
By Company Size



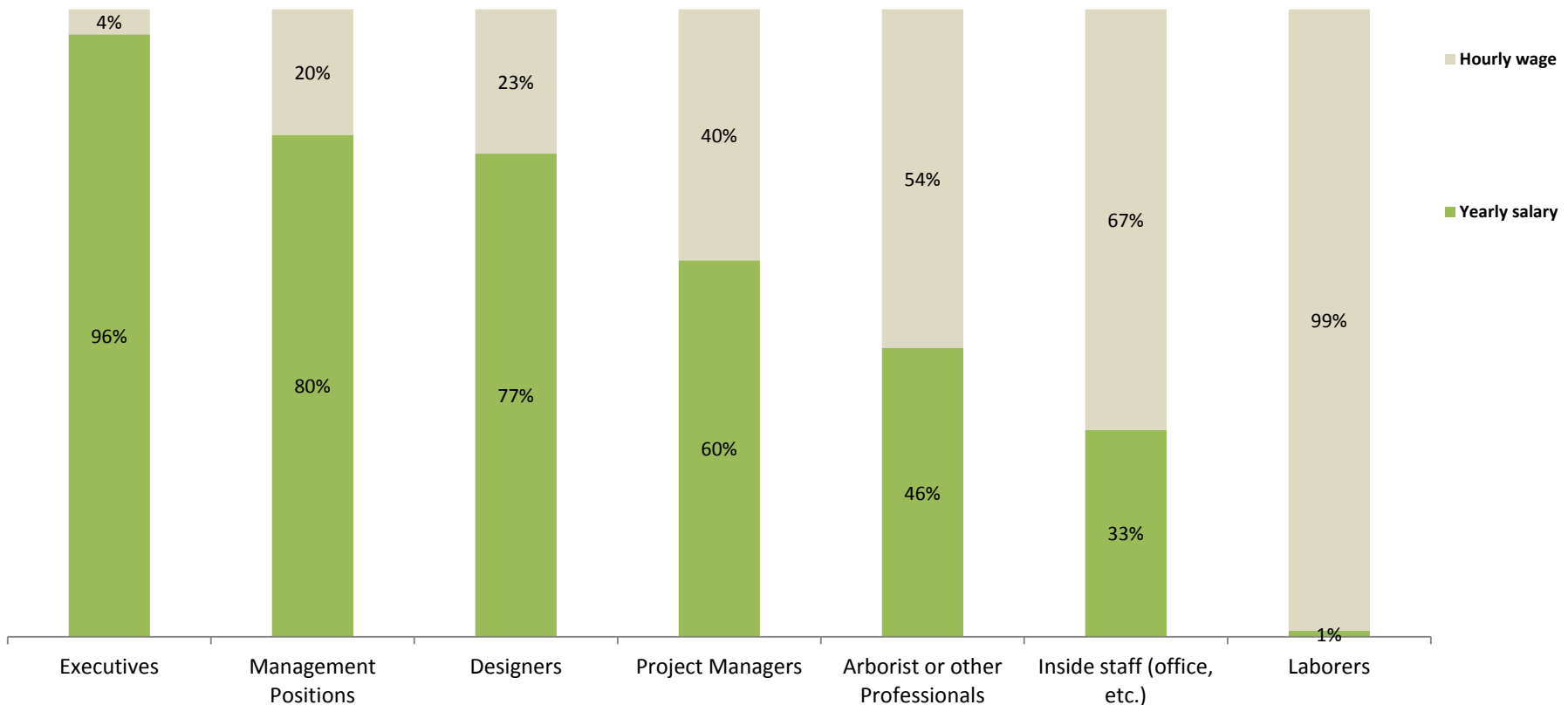
Q. How many employees does your company have?

Employee Compensation

Industry Compensation: Type

➤ Almost all executives receive a salary. The majority say that management positions, designers, and project managers also receive a salary. Arborists, inside staff and laborers more often receive an hourly wage.

Type of Compensation
TOTAL



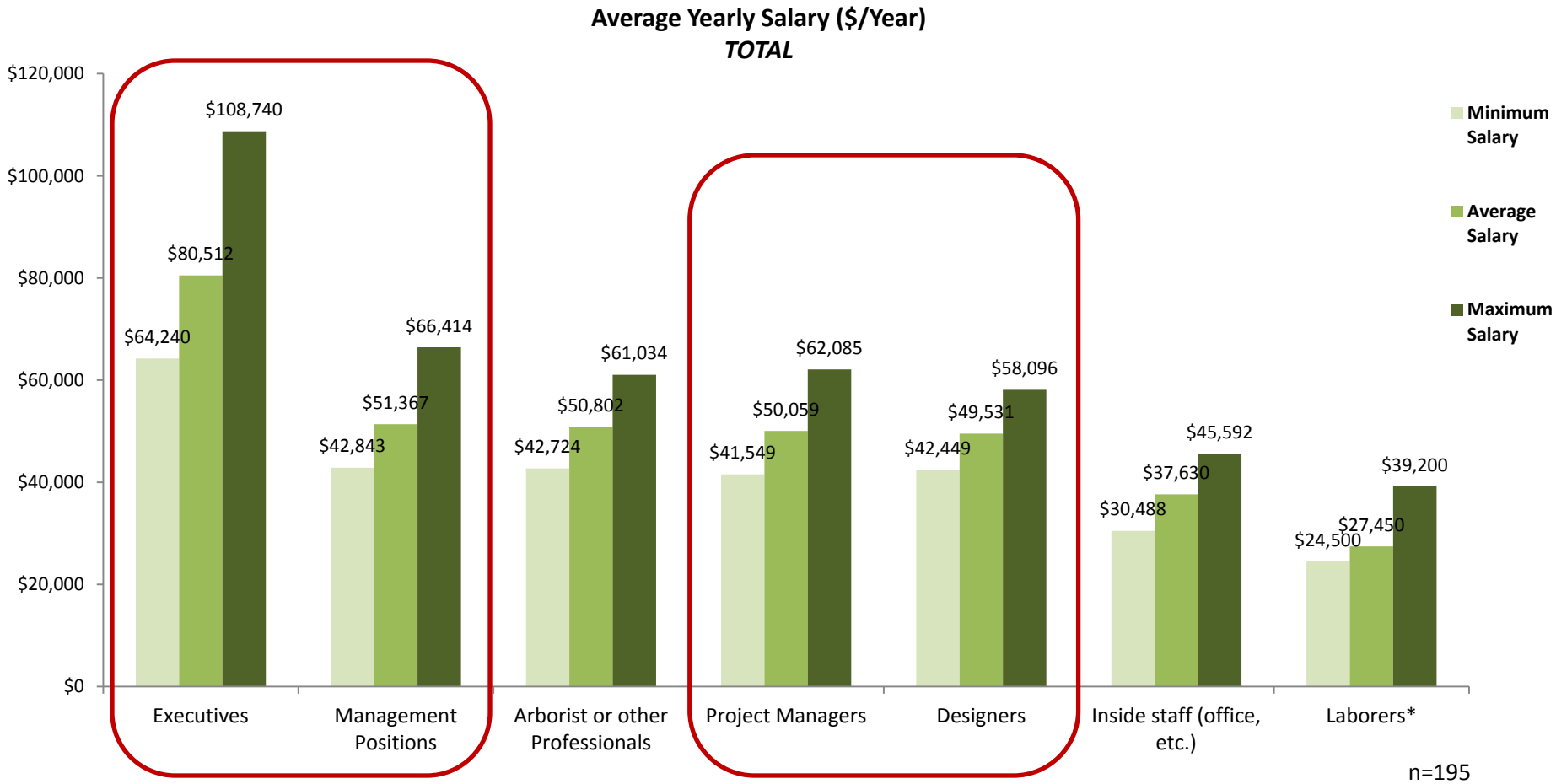
Q. For each of the positions, please indicate how each position is typically compensated (hourly wages versus salary), typical education needed for that position, and if that position typically offers retirement and health insurance.

n=195

Note: Sample size varies by position

Industry Compensation: Yearly Salary

➤ Executives earn the most, with salaries starting on average at \$64,000 per year and topping out at \$108,000. Management position salaries follow executives, with average salaries starting at almost \$43,000 and reaching as high as \$66,000.

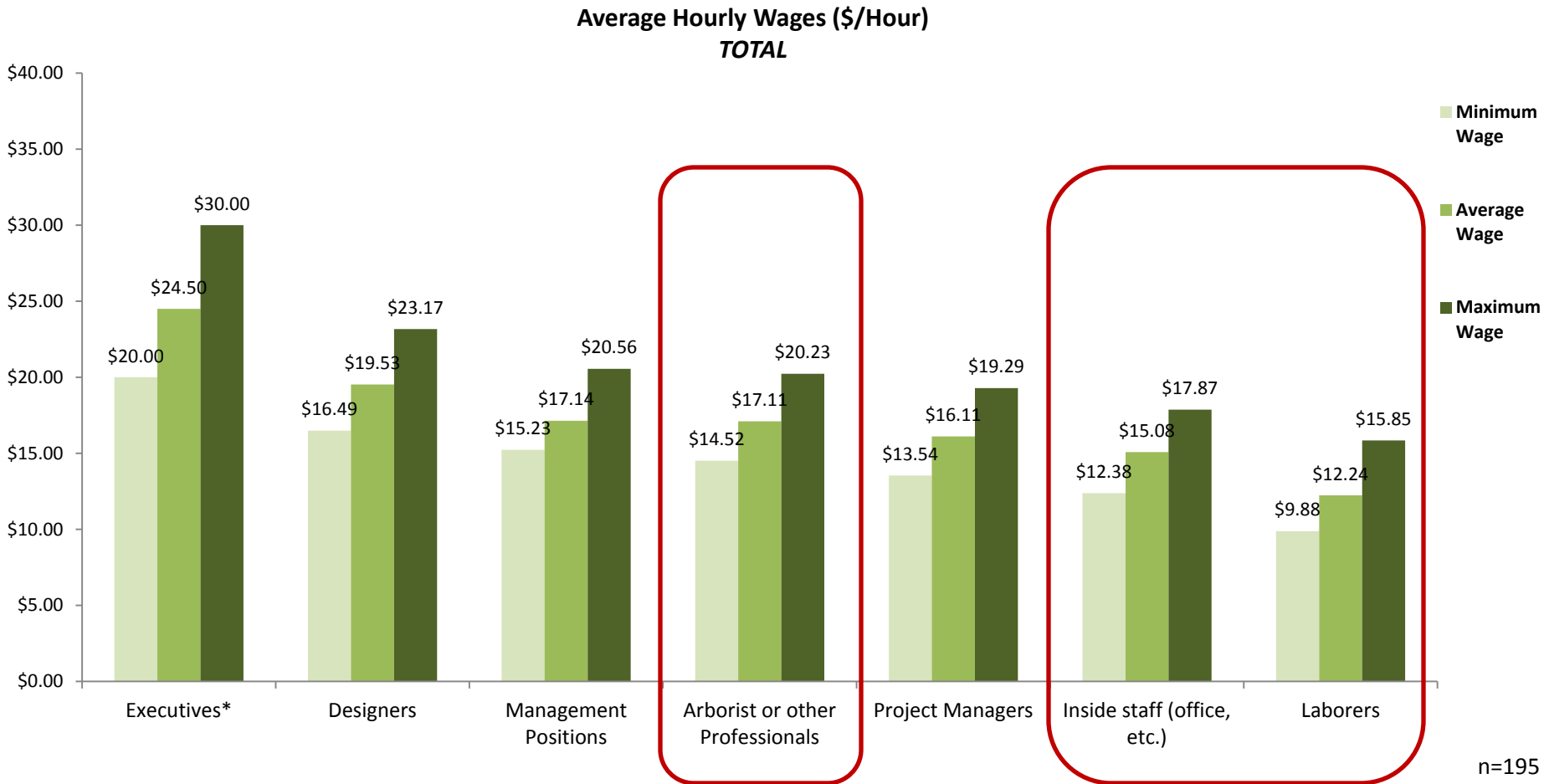


Note: Sample size varies by position
*indicates sample size less than 20

Q. Please record the salary range for each position you mentioned.

Industry Compensation: Hourly Wages

➤ Executives earn the most per hour, followed by Designers. Laborers typically earn the least.

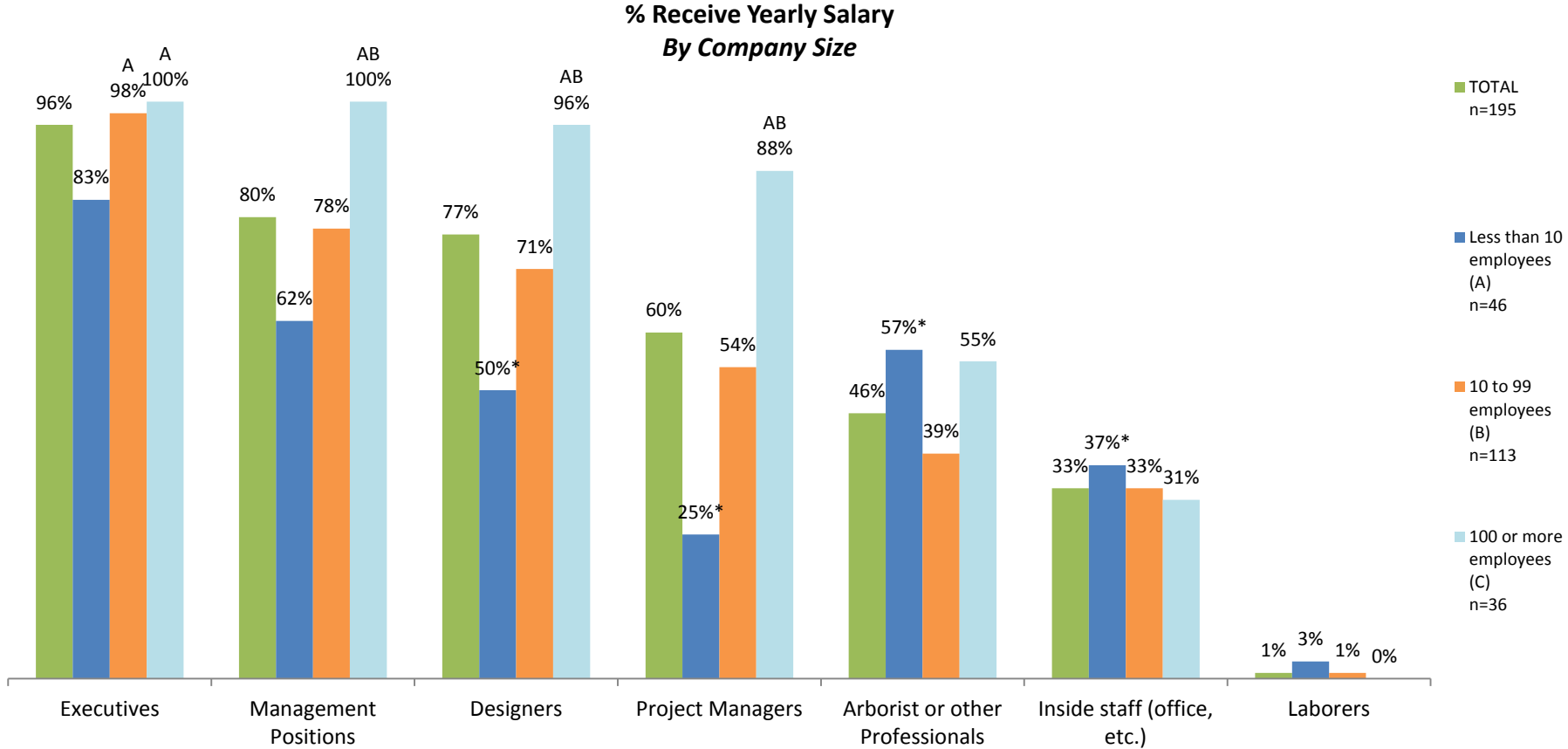


Q. Please record the hourly wage range for each position you mentioned.

Note: Sample size varies by position
*indicates sample size less than 20

Industry Compensation: Type

- The largest companies are most likely to offer yearly salaries, particularly to executives, management positions, designers, and project managers.
- However, for all company sizes, half or more offer salaries to executives, management, and designers.



Q. For each of the positions, please indicate how each position is typically compensated (hourly wages versus salary), typical education needed for that position, and if that position typically offers retirement and health insurance.

Note: Sample size varies by position
*indicates sample size less than 20

Industry Compensation: Retirement Plans

➤ More than half of companies offer a retirement plan for all positions EXCEPT laborers.

Retirement Plan Offered (401K, Pension, or Other)
TOTAL



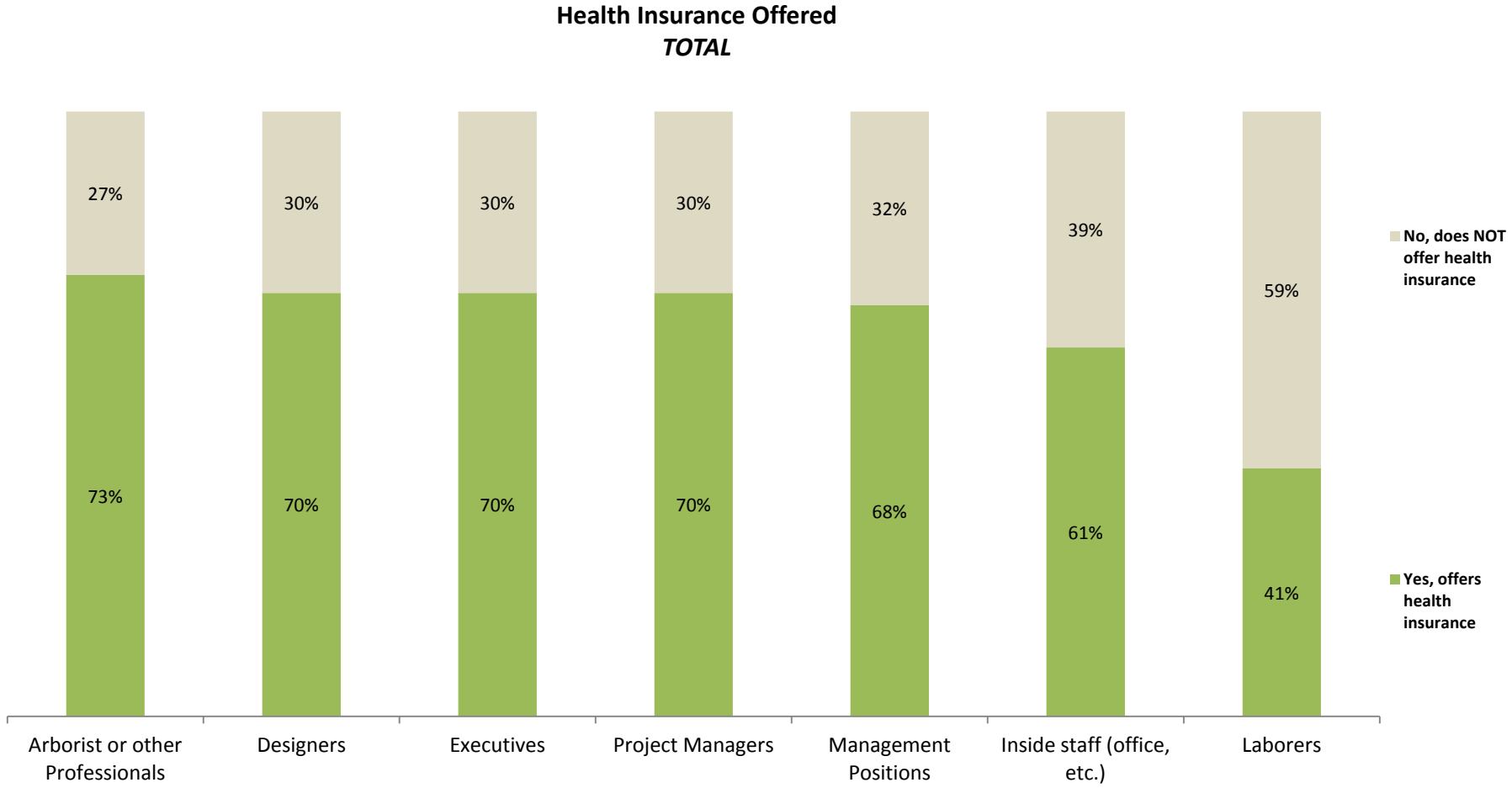
Q. For each of the positions, please indicate how each position is typically compensated (hourly wages versus salary), typical education needed for that position, and if that position typically offers retirement and health insurance.

n=195

Note: Sample size varies by position

Industry Compensation: Health Insurance

➤ More than half of companies offer health insurance for all positions EXCEPT laborers.



Q. For each of the positions, please indicate how each position is typically compensated (hourly wages versus salary), typical education needed for that position, and if that position typically offers retirement and health insurance.

n=195

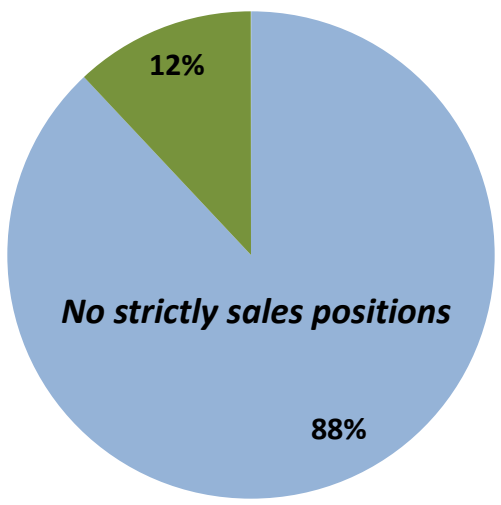
Note: Sample size varies by position

Employee Compensation: ***Sales Positions***

Sales: Dedicated Sales Positions

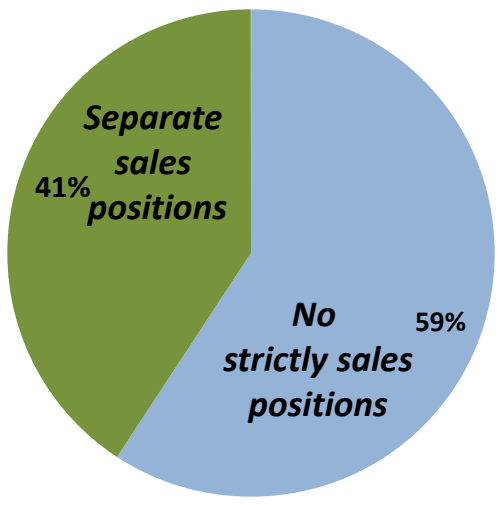
➤ All of the largest companies interviewed have separate sales positions. The medium sized companies are mixed – a little under half have separate sales positions. The smallest companies generally do not have separate sales positions.

Sales Positions
Less than 10 Employees



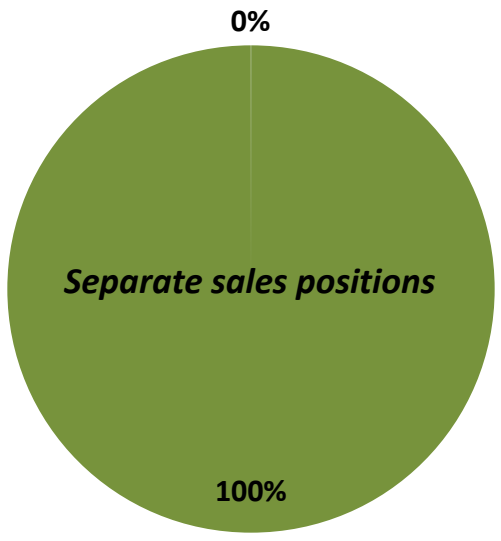
n=8

Sales Positions
10 to 99 Employees



n=27

Sales Positions
100 or More Employees



n=9

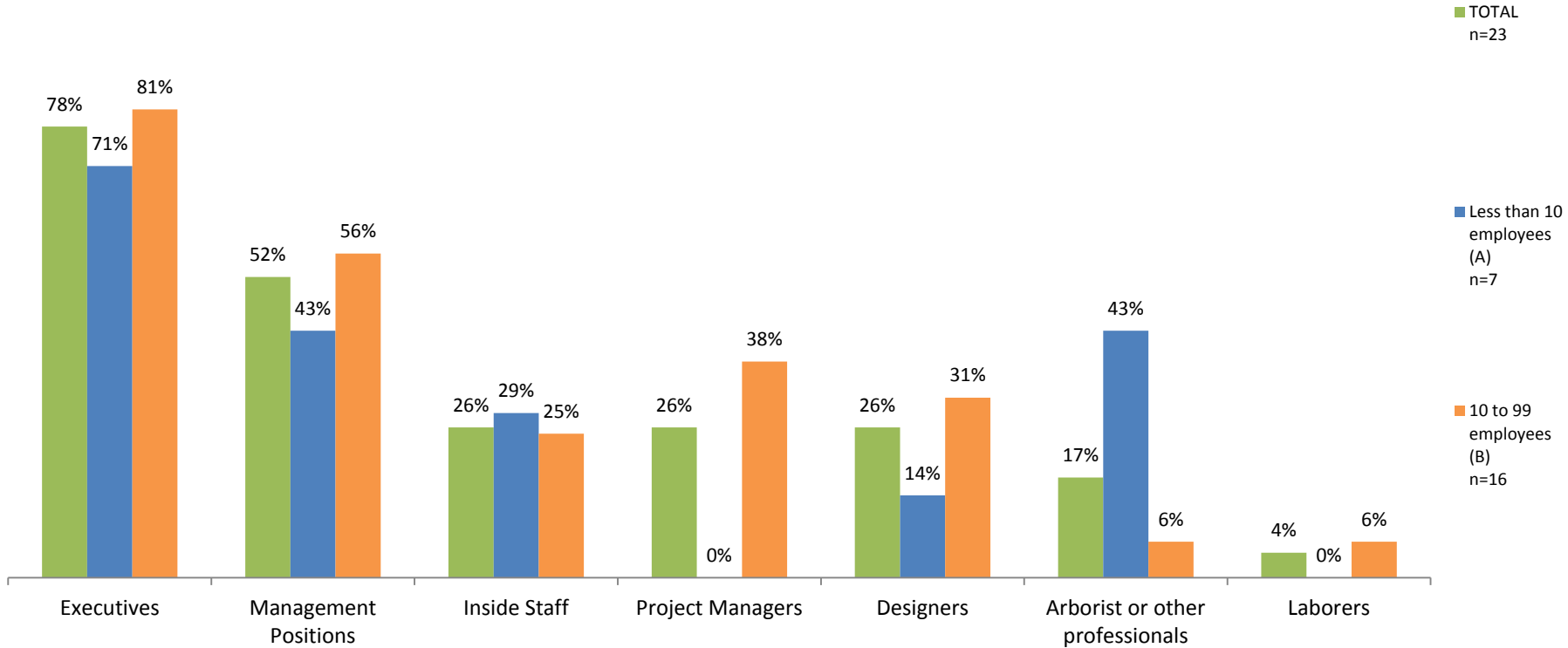
- NO strictly sales: employees who do sales also have other roles/positions in the company
- HAVE separate sales positions

Q. Which of the following best describes who/which position handles sales at your company?

Sales: Which Other Position(s) Handle

- For both small and medium companies with no dedicated sales positions, an Executive most often handles sales/quotes (78% of companies).
- Management positions handle sales in about half of these companies (52%).

Positions That Handle Sales/Quotes if No Dedicated Sales Position
By Company Size

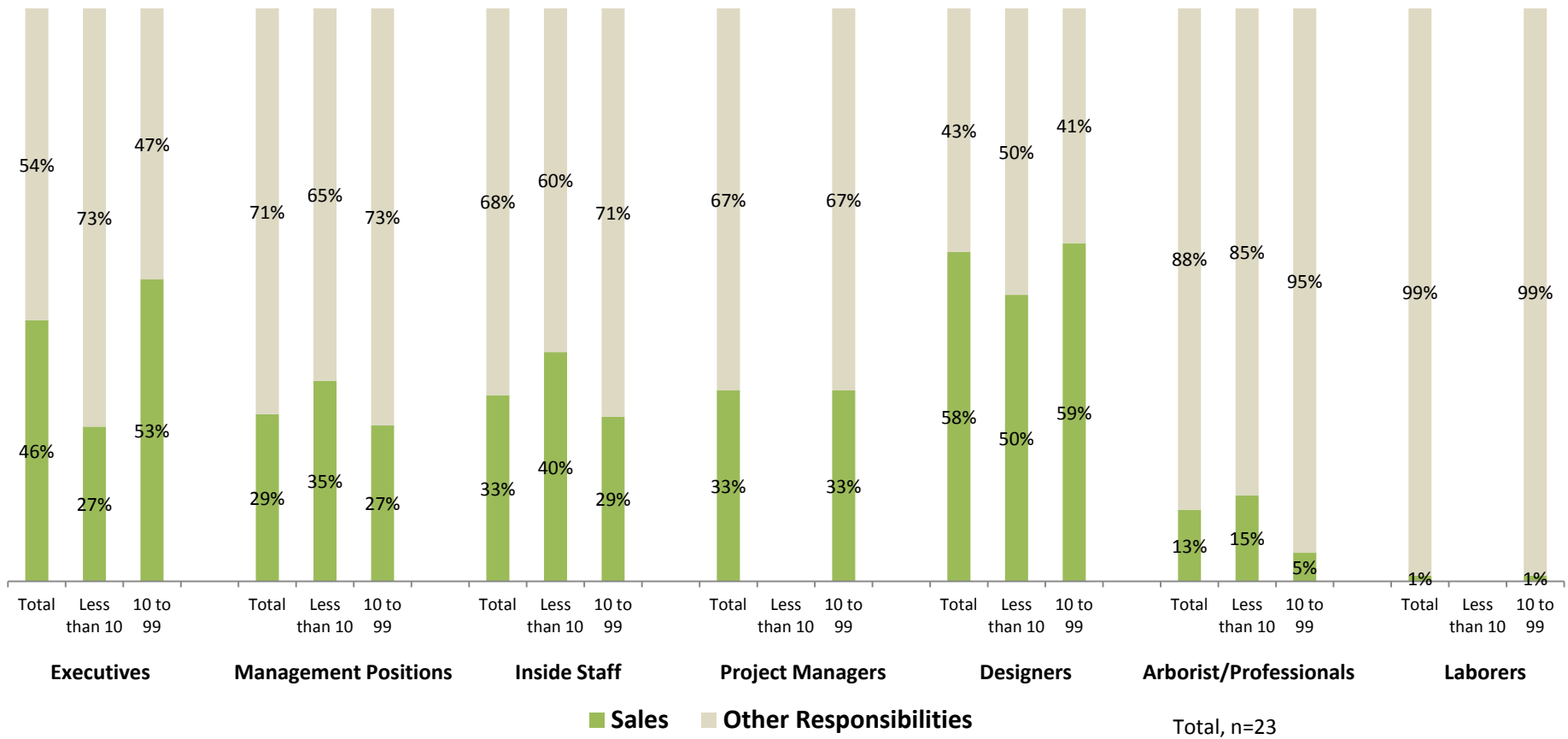


Q. Which of the following positions at your company handles sales/quotes? [If company does not have separate sales positions]

Sales: Size of Sales Role in Other Positions

- Among Executives who handles sales, about half of their role is sales among medium size companies, and the minority is sales among the smallest companies.
- While only 1 in 4 companies without sales positions indicate that Designers handle quotes and sales, but among those that do, sales/quotes are at least 50% of Designers' role.

Average % of Position that is Sales versus Other Responsibilities
TOTAL



Total, n=23
 Less than 10 employees, n = 7
 10 to 99 employees, n = 16

Note: Sample size varies by position
 Note: Small sample sizes

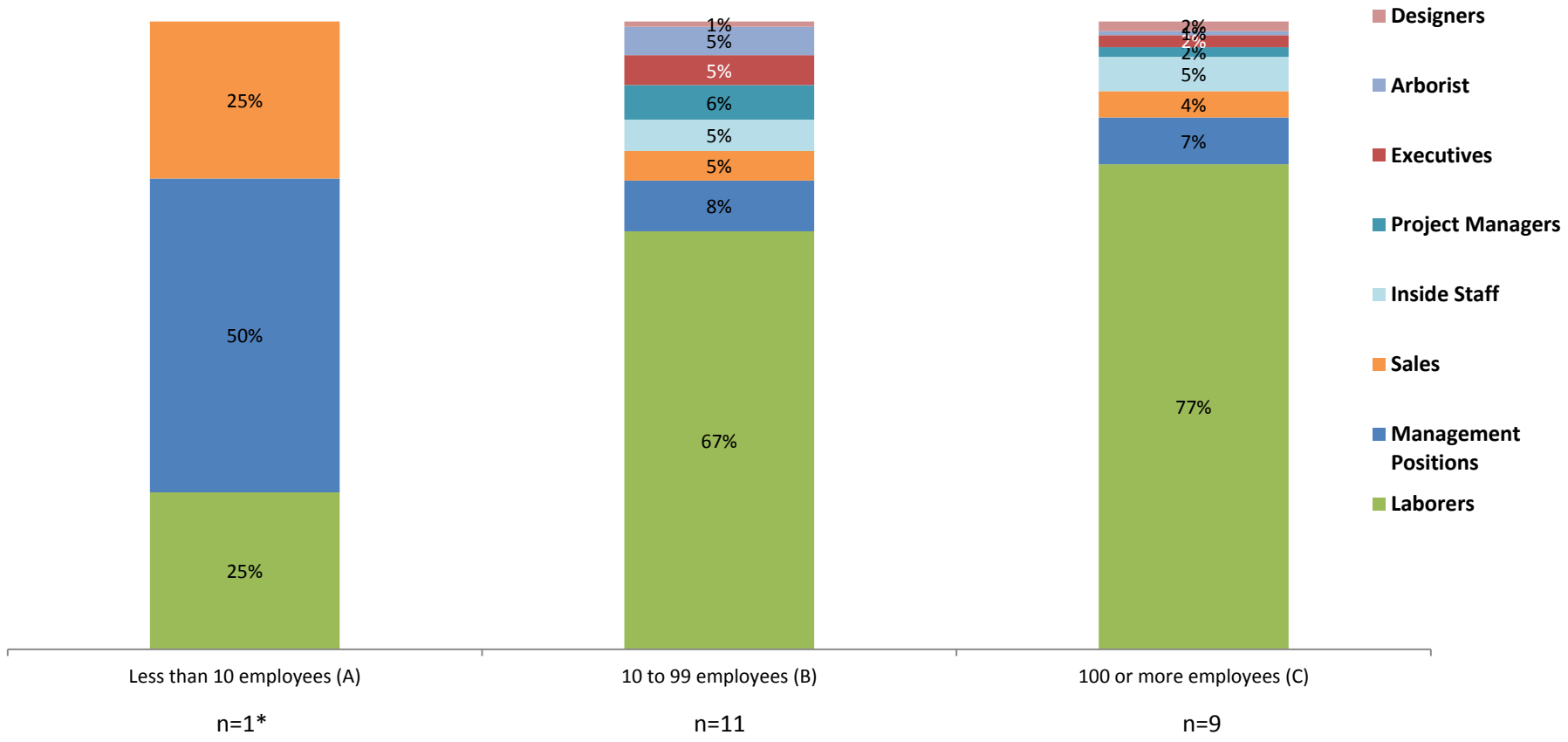
Q. And what percentage of that position's role is sales and what percentage is other responsibilities? [If company does not have separate sales positions]



Sales: Firm Position Mix IF Have Dedicated Sales Positions

➤ Of the medium and large companies with dedicated sales positions, these sales positions constitute about 5% of positions.

Average Position Mix
By Company Size



Q. Now including sales positions, how many employees does your company have? [if company has separate sales positions]

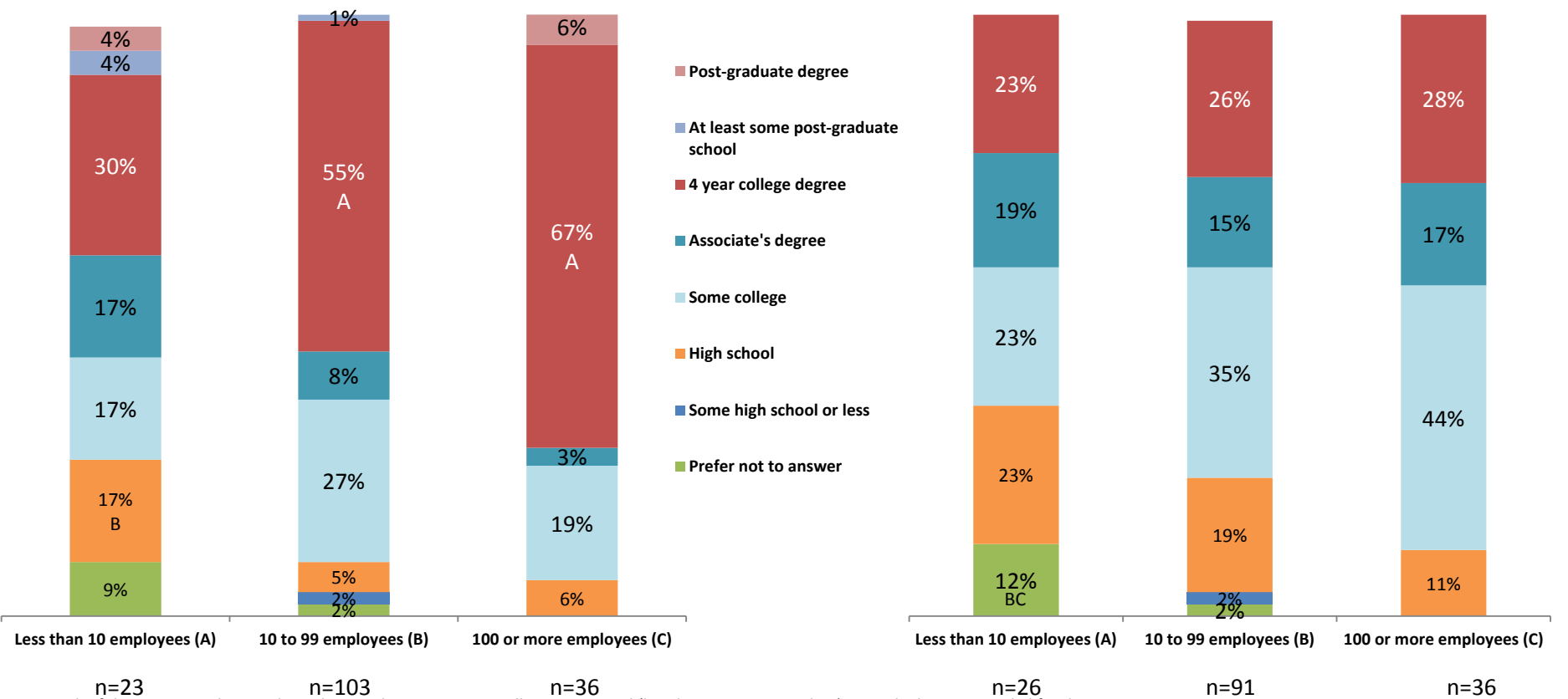
Employee Education

Education by Position

➤ More than half of companies with 10 or more employees say that a college degree is typically required for an executive position. Some college is the most frequent typical requirement for management positions.

Typical Educational Qualifications for EXECUTIVES
By Company Size

Typical Educational Qualifications for MANAGEMENT POSITIONS
By Company Size



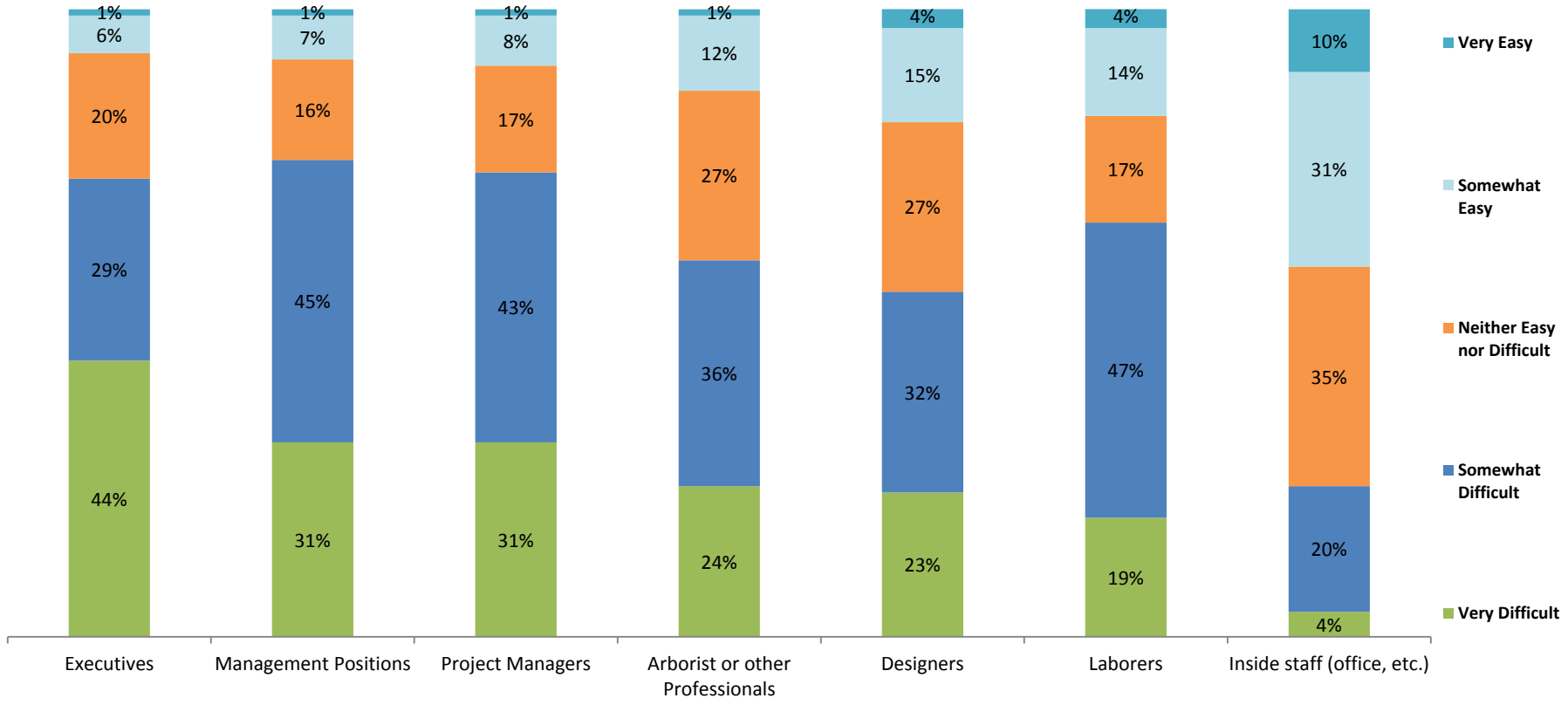
Q. For each of the positions, please indicate how each position is typically compensated (hourly wages versus salary), typical education needed for that position, and if that position typically offers retirement and health insurance.

Prospective Employment

Qualified Employee Attitudes

➤ Overall, companies report the most difficulty with finding qualified executives, management, and project managers.

Ease of Finding Qualified Employees
TOTAL



n=195

Note: Sample size varies by position
Note: Don't Know responses removed

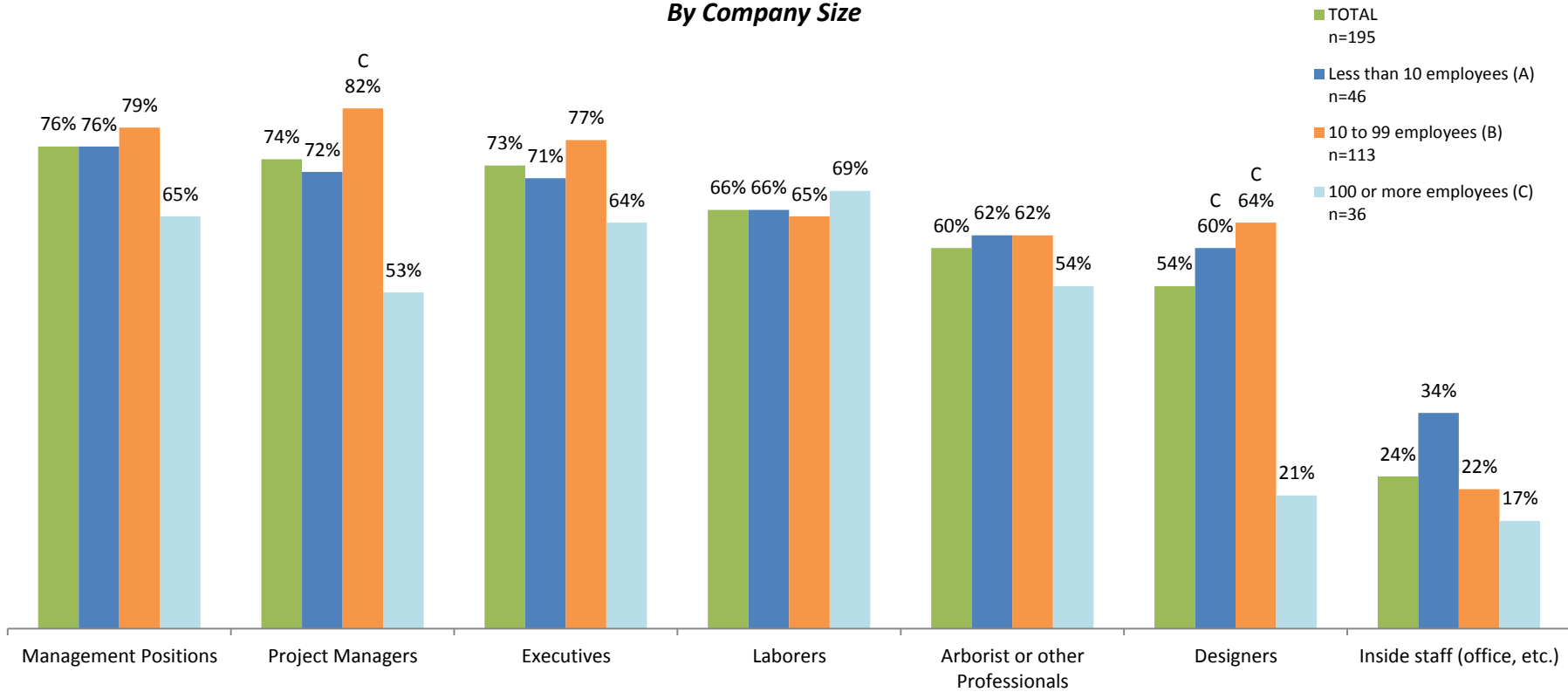
Q. Please rate the ease of finding qualified employees for each position in your company.



Qualified Employee Attitudes

- Directionally, smaller companies have a more difficult time in finding qualified applicants than the largest companies (100 or more employees).
- While management, project managers and executives are the most difficult to find for companies with less than 100 employees, these largest companies find laborers the most difficult position to fill.

**% Very or Somewhat Difficult to Find
By Company Size**



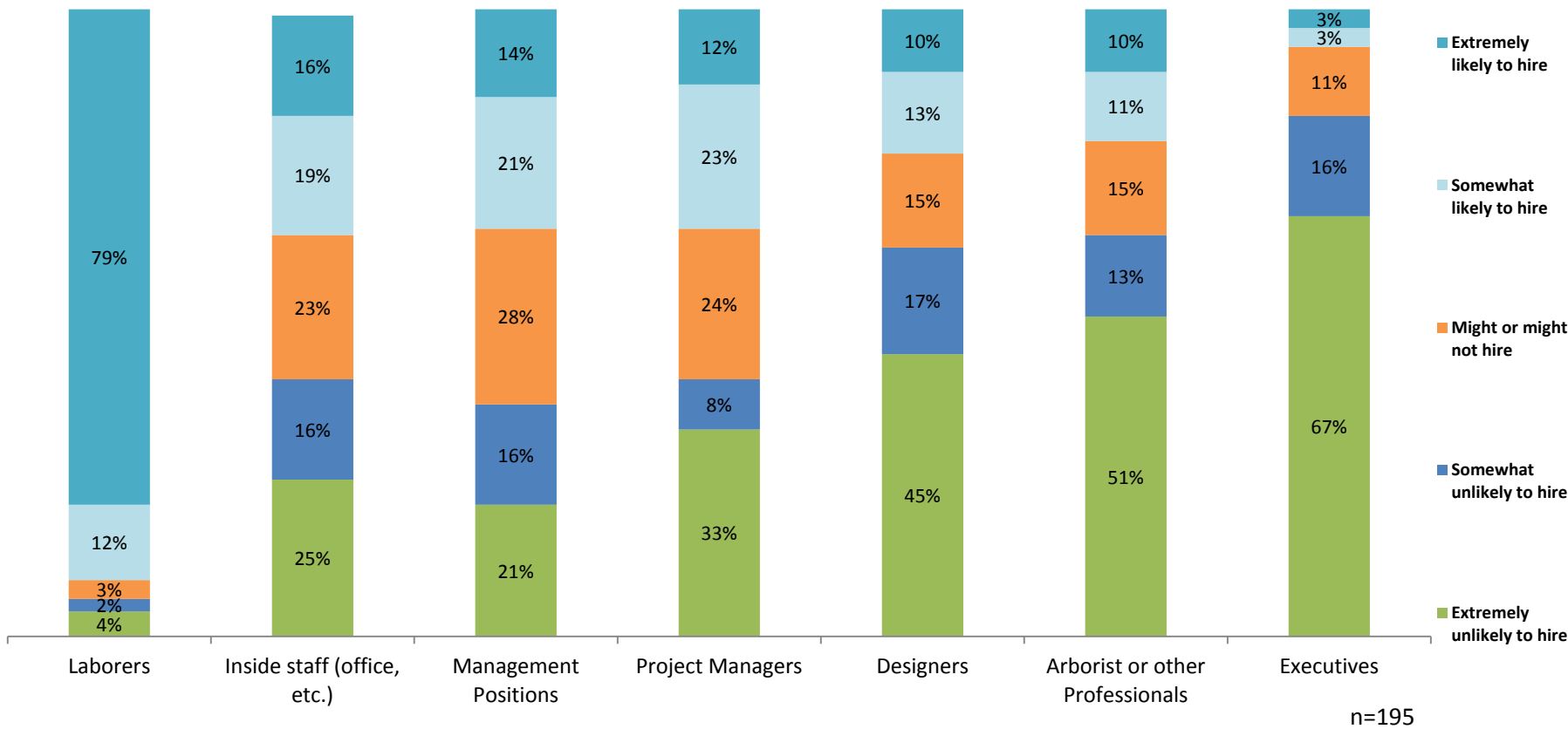
Q. Please rate how likely your company would be to hire for the following positions in the next year.

Note: Sample size varies by position
Note: Don't Know responses removed

Future Hires Outlook

➤ Laborer positions are the most likely to be hired in the next year.

Likelihood to Hire Position in Next Year
TOTAL

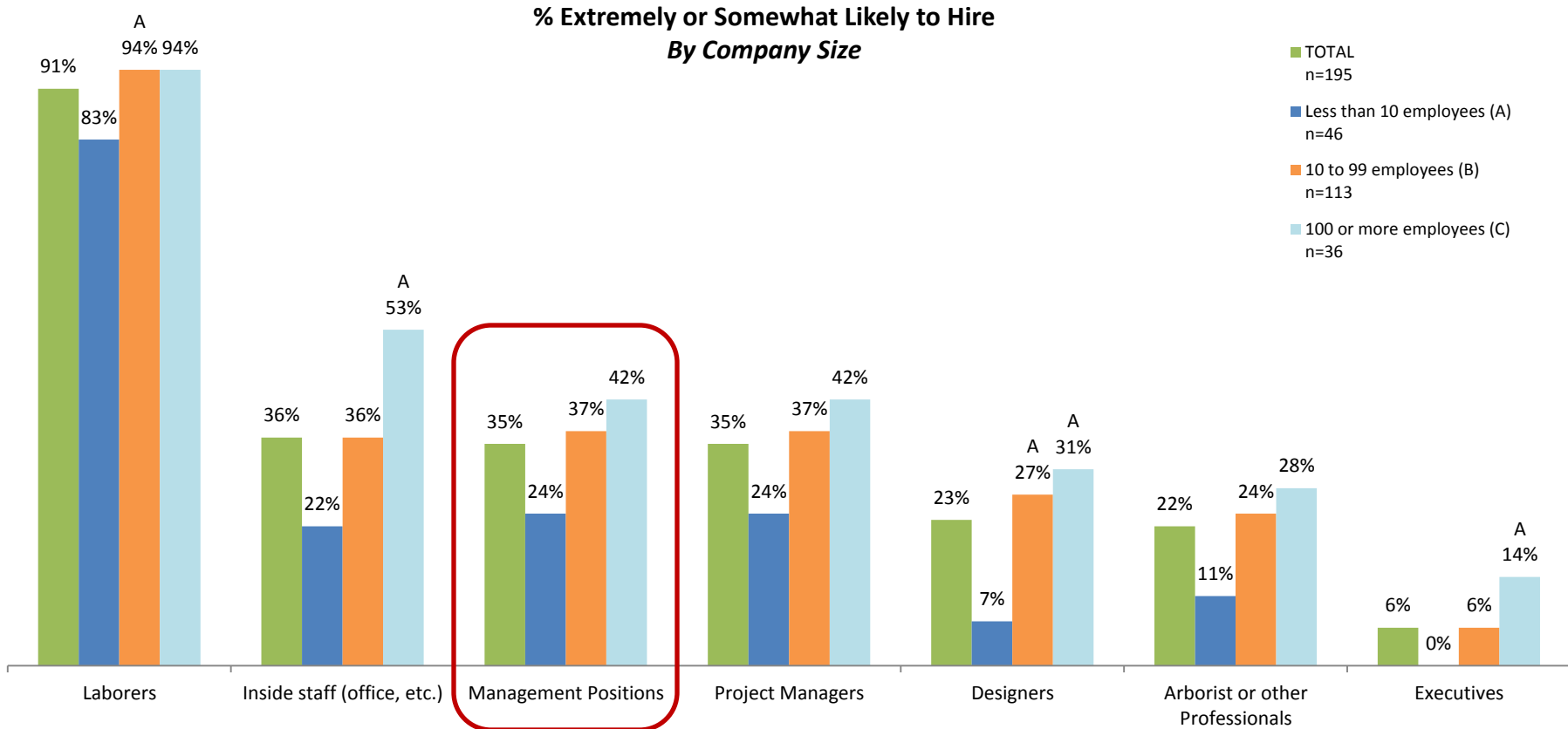


Q. Please rate how likely your company would be to hire for the following positions in the next year.

Note: Don't Know responses removed

Future Hires Outlook

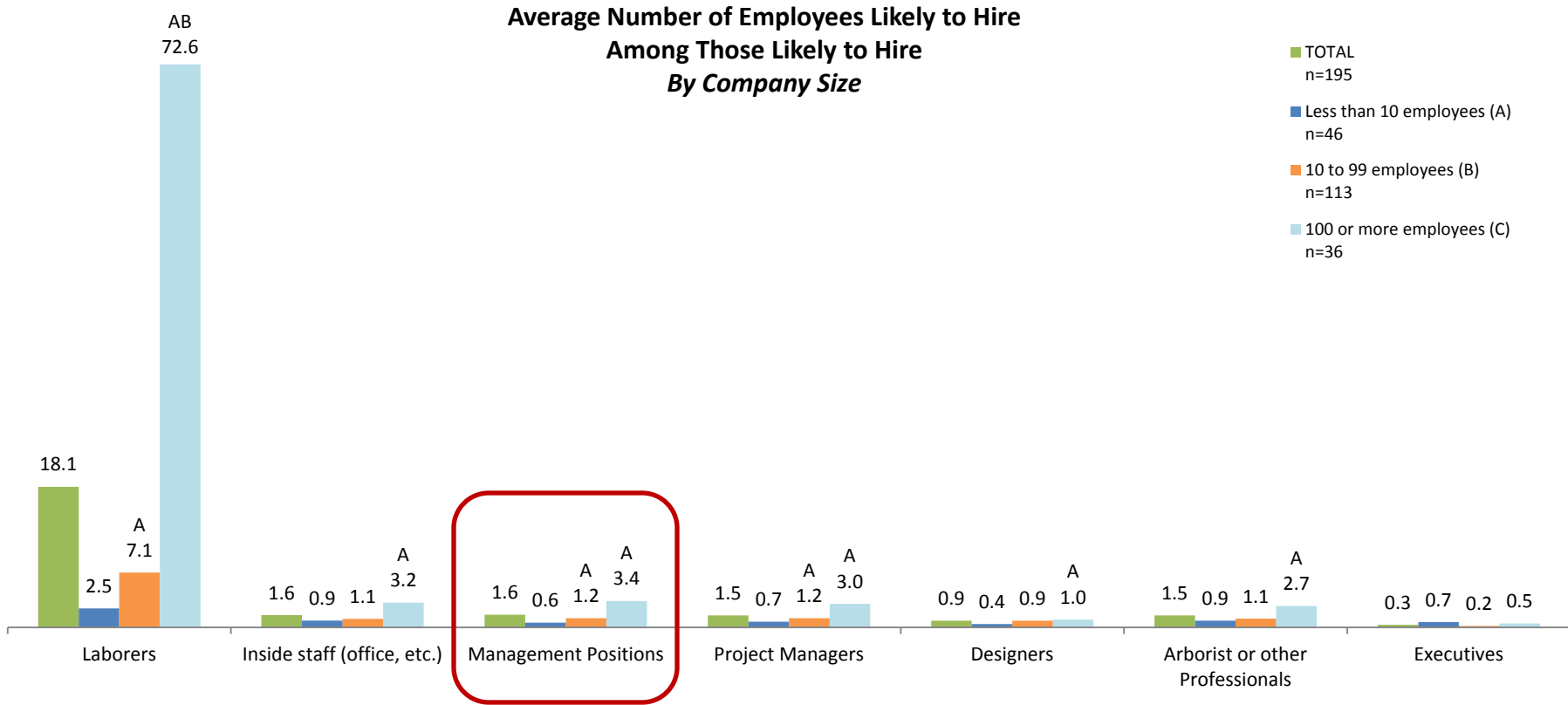
➤ Most companies in the industry expect to hire laborers. About 4 in 10 companies with at least 10 employees expect to hire management positions in the next year.



Q. Please rate how likely your company would be to hire for the following positions in the next year.

Potential Future Hires Outlook

➤ Among those who may hire, companies with 10 to 99 employees expect to hire 1 management position on average, while those with 100 or more employees expect to hire an average of 3-4 management positions in the next year.

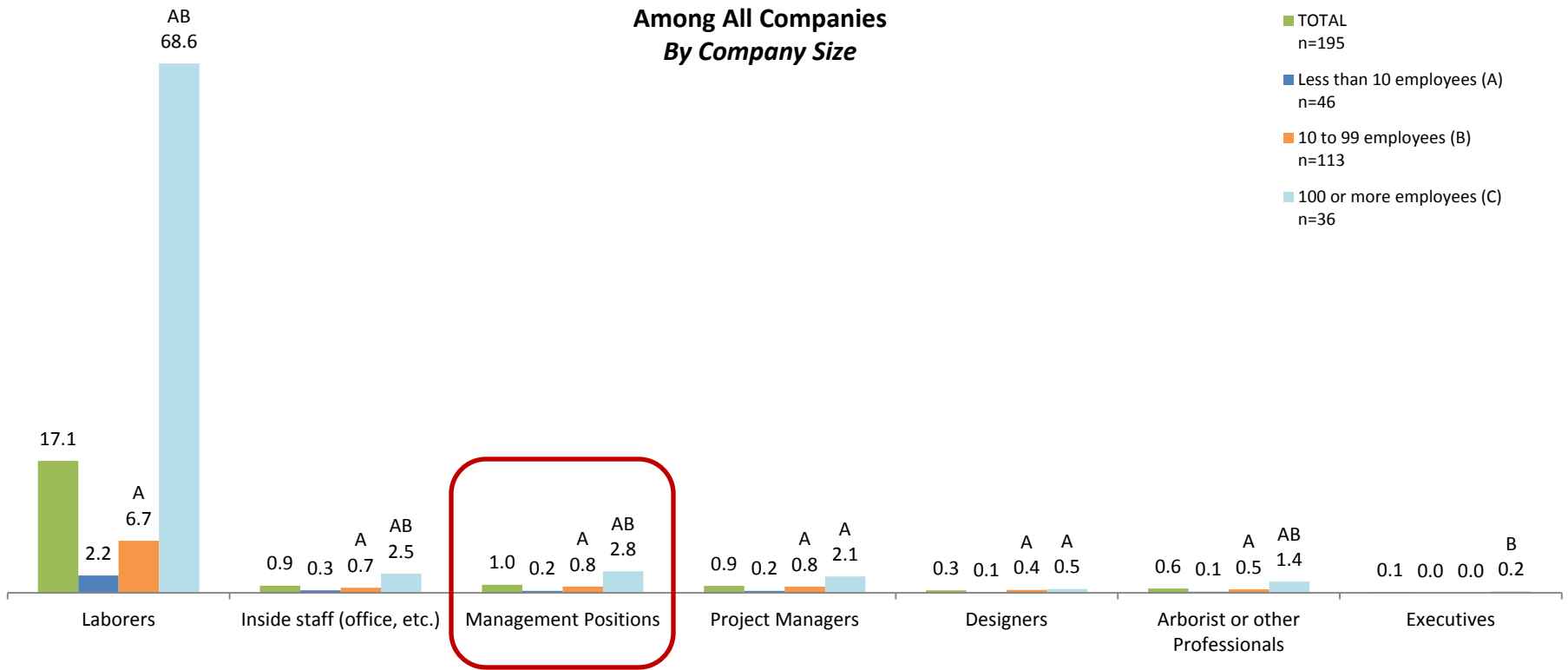


Q. And how many positions do you think you would be likely to hire next year? [Ask if Might or might not hire, Somewhat likely to hire, or Extremely likely to hire] Note: Sample size varies by position

Potential Future Hires Outlook

➤ The average firm is looking to hire 1 management position in the next year.

Average Number of Employees Likely to Hire
Among All Companies
By Company Size



Q. And how many positions do you think you would be likely to hire next year? [Ask if Might or might not hire, Somewhat likely to hire, or Extremely likely to hire]

Note: Those Somewhat/Extremely unlikely to hire coded as 0 employees likely to hire

Landscape Industry: Number of Hires in Next Year Estimate

Landscape Industry: Estimated Number of Hires

	Less than 10 Employees	10 to 99 Employees	100 or More Employees	TOTAL Industry
Executives	500	100	40	640
Management Positions	10,500	4,500	750	15,750
Designers	1,875	2,450	180	4,505
Project Managers	9,275	4,530	470	14,275
Arborists or other professionals	6,590	3,040	330	9,960
Inside Staff	10,330	3,740	800	14,870
Laborers	146,200	65,275	30,000	241,475
Total Industry Less Laborers	39,070	18,360	2,555	60,000

Note: Reflects total expected hires in the next year, not NET new hires. Laborers hires, particularly in the Less than 10 employee group, are expected to be seasonal hires.

Prospective Employment: *Advice*

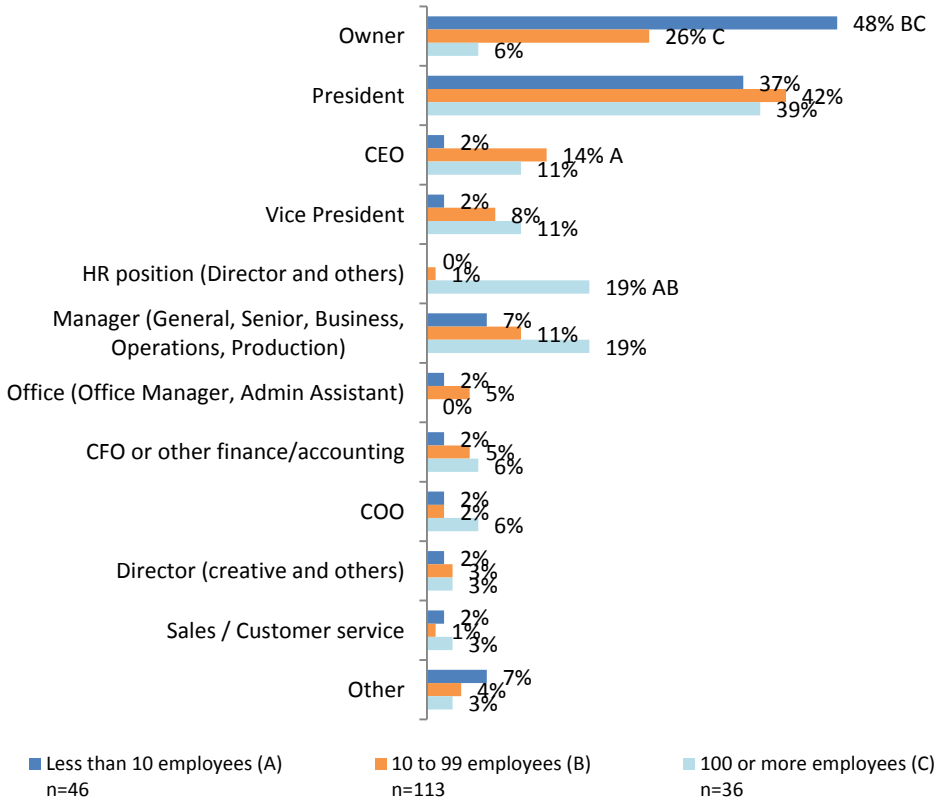
(available in full report)

Respondent & Firm Demographics

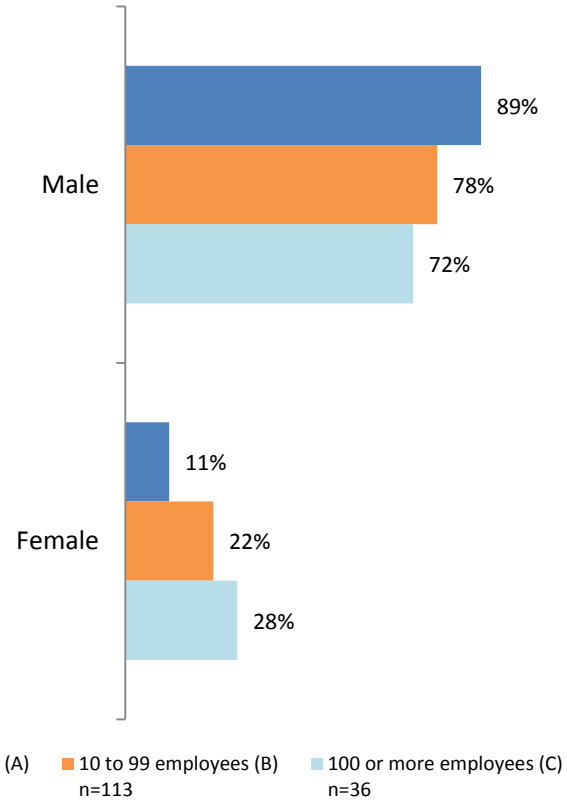
Respondent Position

➤ Most interviewed are male and are either the company Owner or President.

**Respondent Title
By Company Size**



**Respondent Gender
By Company Size**

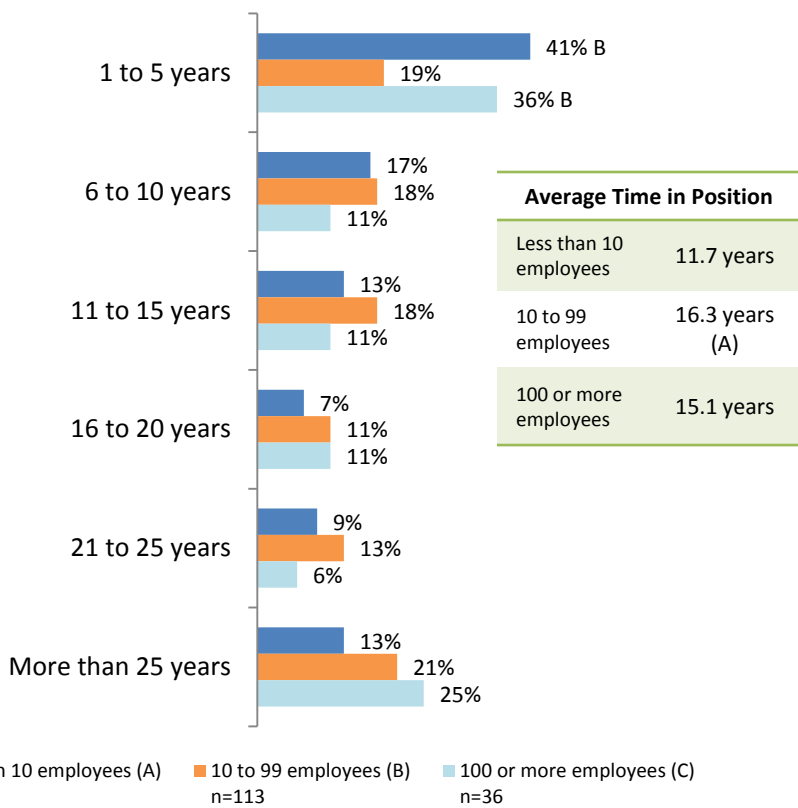


Q. Are you...
Q. What is your title/position at the company?

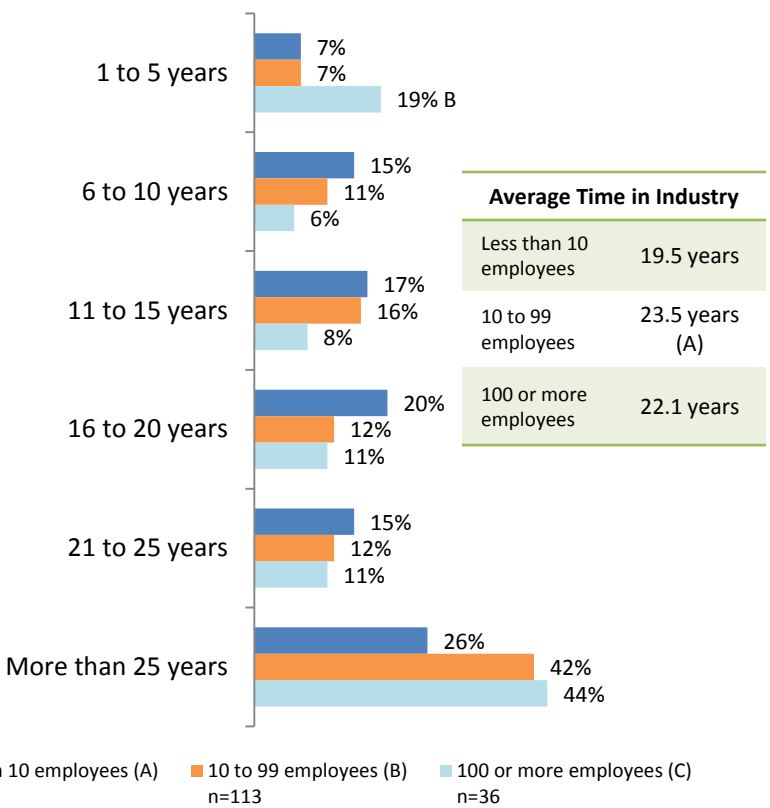
Respondent Experience

➤ On average, those interviewed have been in the landscaping industry about 20 years or more. However, those in companies with 10 to 99 employees have been in both their position and in the industry longest.

**Time in Position
By Company Size**



**Time in Industry
By Company Size**

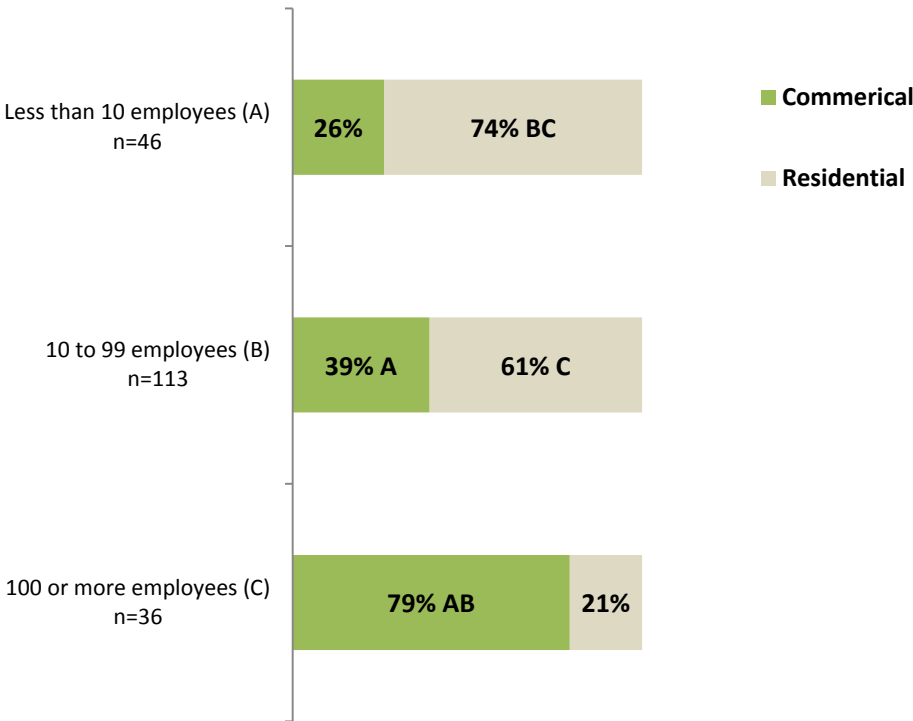


Q. How long have you been in this job position at your company?
 Q. How long have you been in this industry?

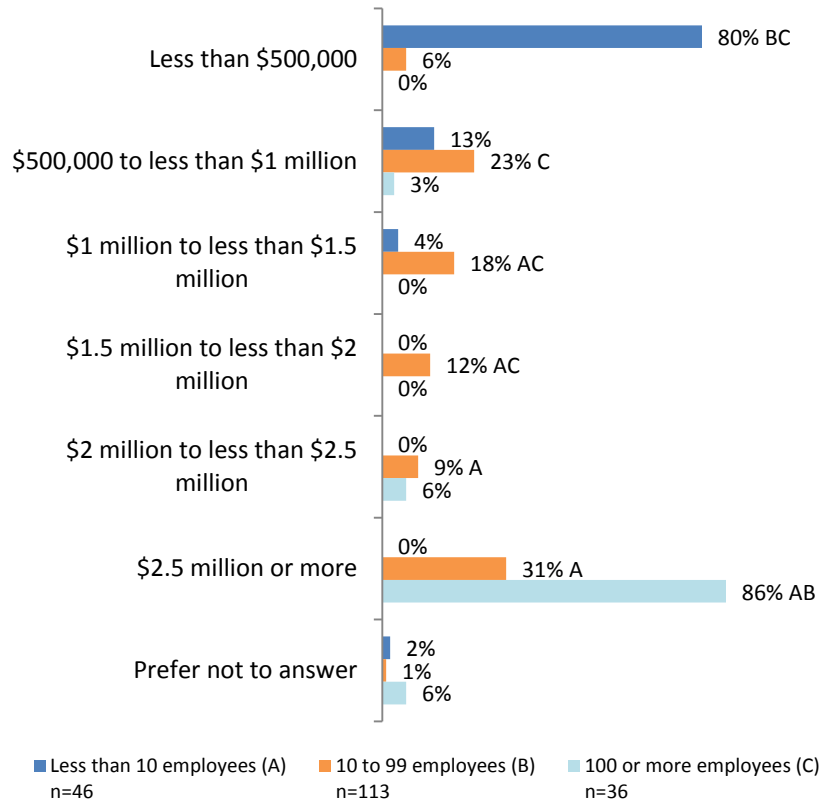
Firm Incomes

- Revenue and commercial channel work increases with company size.
- Most of the smallest companies have revenues less than \$500,000 and do primarily residential work. Mid-size companies have revenues between \$500,000 and \$2.5 million and do slightly more residential work. The largest companies have revenue over \$2.5 million and do primarily commercial work.

Average Company Revenue Splits by Channel
By Company Size



Company Income
By Company Size

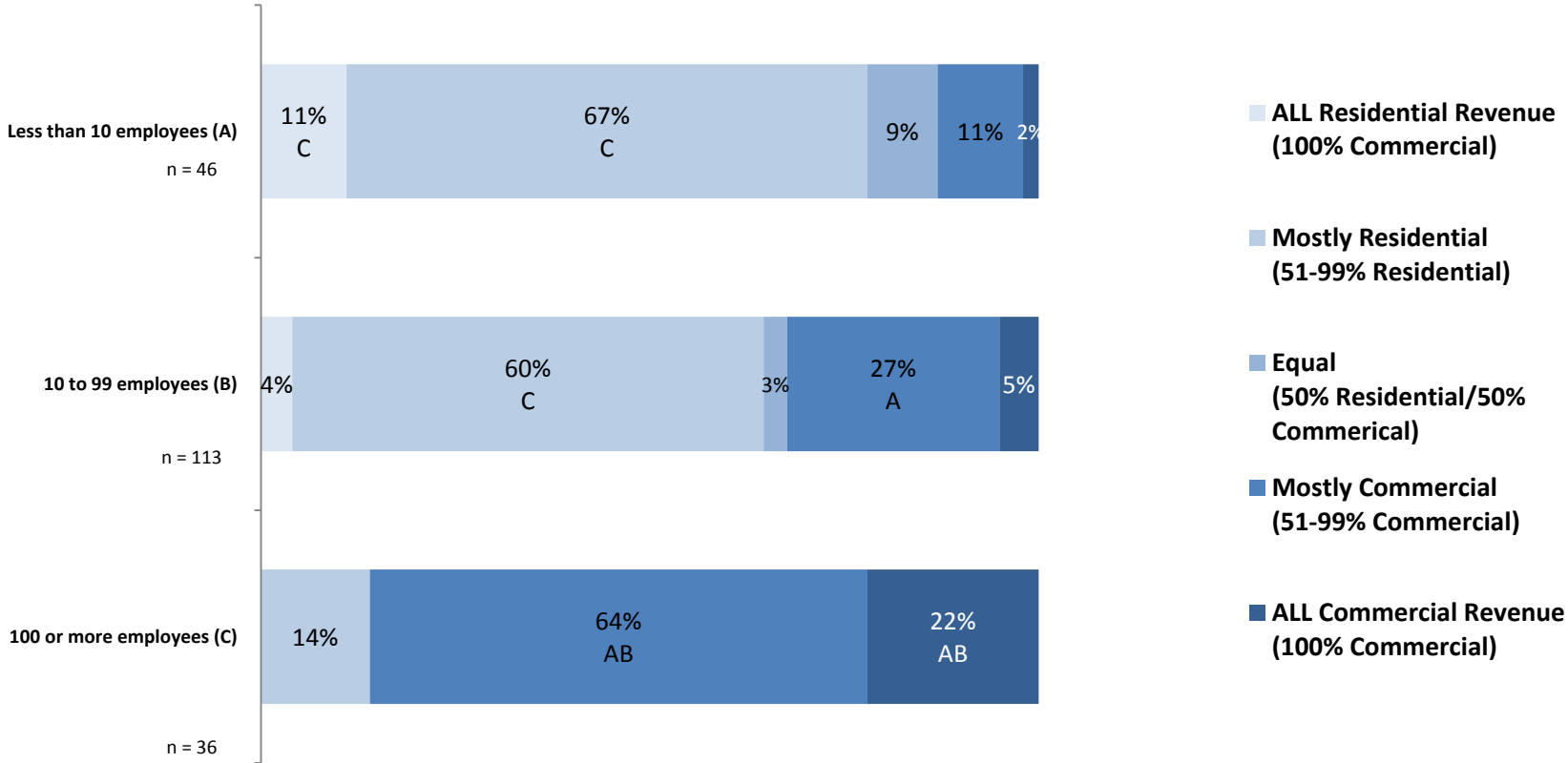


Q. What % of your company's total revenues would you say comes from Commercial projects or jobs and what % comes from Residential?
Q. In terms of gross revenues, where do you estimate your firm will finish the calendar year 2014?

Firms by Channel

➤ Most of the smallest companies (78%) do more than half of their business in the residential channel. Medium companies are slightly skewed to residential, with 64% of their business mostly residential. The largest companies do most of their business in the commercial channel, with 86% doing mostly or all commercial work.

Average Company Revenue Splits by Channel
By Company Size

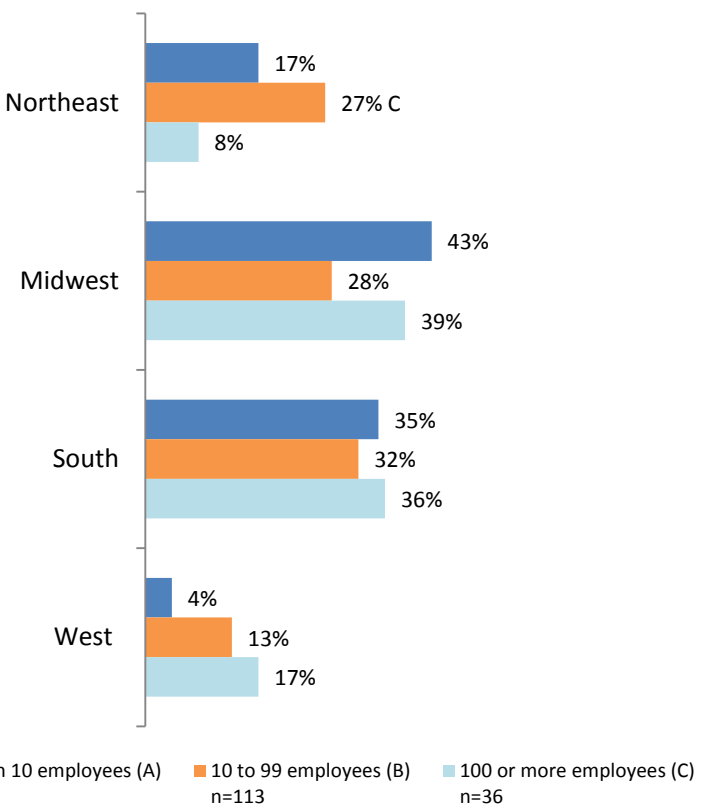


Q. What % of your company's total revenues would you say comes from Commercial projects or jobs and what % comes from Residential?

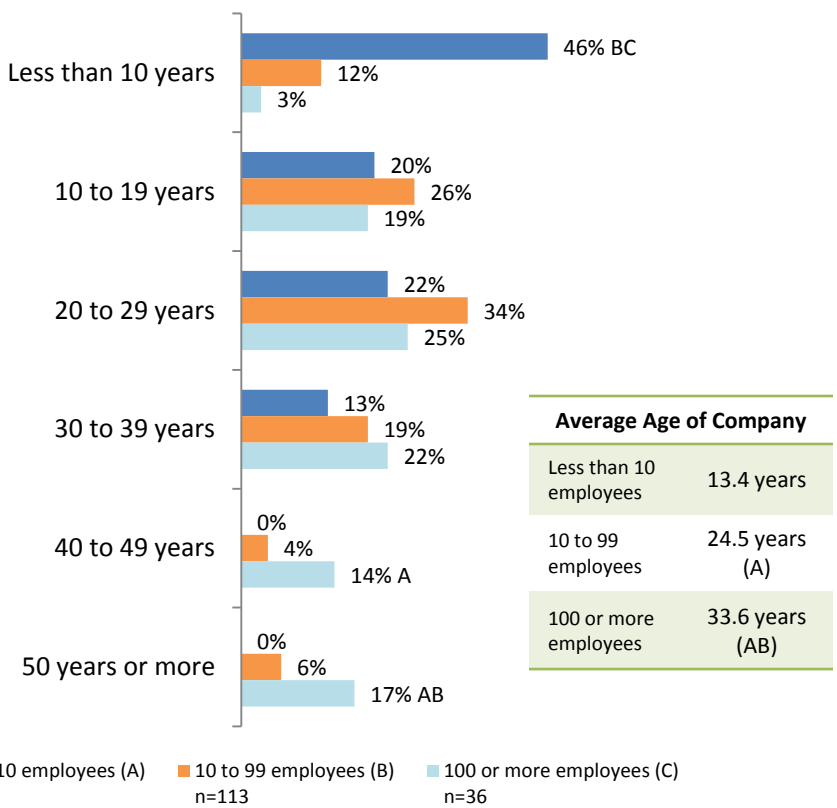
Firm Demographics

- Companies with 10 to 99 employees are concentrated more in the Northeast than others.
- The smallest companies (less than 10 employees) tend to be the youngest companies, while the largest companies (100 or more employees) tend to be the oldest companies.

**Company Census Region
By Company Size**



**Company Age
By Company Size**



Q. In which state does your company reside?
 Q. How long has your company existed?