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.

<table>
<thead>
<tr>
<th></th>
<th>Less than 10 Employees</th>
<th>10 to 99 Employees</th>
<th>100 or more Employees</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Design or Build</td>
<td>10</td>
<td>41</td>
<td>4</td>
<td>55</td>
</tr>
<tr>
<td>Landscape Management</td>
<td>10</td>
<td>34</td>
<td>18</td>
<td>62</td>
</tr>
<tr>
<td>Lawn Care</td>
<td>22</td>
<td>29</td>
<td>8</td>
<td>59</td>
</tr>
<tr>
<td>Other</td>
<td>4</td>
<td>9</td>
<td>6</td>
<td>19</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>46</strong></td>
<td><strong>113</strong></td>
<td><strong>36</strong></td>
<td><strong>195</strong></td>
</tr>
</tbody>
</table>
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:

<table>
<thead>
<tr>
<th></th>
<th>Total Interviews</th>
</tr>
</thead>
<tbody>
<tr>
<td>Less than 10 Employees</td>
<td>8</td>
</tr>
<tr>
<td>10 to 99 Employees</td>
<td>27</td>
</tr>
<tr>
<td>100 or More Employees</td>
<td>9</td>
</tr>
<tr>
<td>Total</td>
<td>44</td>
</tr>
</tbody>
</table>

Note: Due to very small sample sizes by size of company, statistical significance testing between firm size is excluded.
SUMMARY OF 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
The vast majority of all landscape industry firms perform multiple types of jobs rather than specializing in only one type.

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

<table>
<thead>
<tr>
<th>Job Mix – Multiple Types</th>
<th>Less than 10 Employees</th>
<th>10 to 99 Employees</th>
<th>100 or More Employees</th>
</tr>
</thead>
<tbody>
<tr>
<td>Multiple Types</td>
<td>80%</td>
<td>90%</td>
<td>94%</td>
</tr>
<tr>
<td>All one type</td>
<td>20%</td>
<td>10%</td>
<td>6%</td>
</tr>
</tbody>
</table>

n=46  n=113  n=36

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

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

- **Less than 10 Employees**
  - Lawn Care: 44% (BC)
  - Design or Build: 23%
  - Landscape Management: 22%
  - All Other: 12%

- **10 to 99 Employees**
  - Lawn Care: 21%
  - Design or Build: 34%
  - Landscape Management: 22%
  - All Other: 14%

- **100 or More Employees**
  - Lawn Care: 16%
  - Design or Build: 30%
  - Landscape Management: 47%
  - All Other: 20%
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.

**Firm Employee Mix**

- **Q. How many employees does your company have?**
  - **Less than 10 Employees**
    - Full-Time, Year Round: 52%
    - Part-Time, Year Round: 11%
    - Full-Time, Seasonal: 16%
    - Part-Time, Seasonal: 21%

  - **10 to 99 Employees**
    - Full-Time, Year Round: 50%
    - Part-Time, Year Round: 8%
    - Full-Time, Seasonal: 37%

  - **100 or More Employees**
    - Full-Time, Year Round: 54%
    - Part-Time, Year Round: 6%
    - Full-Time, Seasonal: 31%
    - Part-Time, Seasonal: 9%

**n=46**

**n=113**

**n=36**

Q. How many employees does your company have?
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.
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

- Northeast (A): 73% B, 20% D
- Midwest (B): 48% B, 21% D
- South (C): 55% B, 20% D
- West (D): 65% B, 26% D

Q. How many employees does your company have?

NATIONAL ASSOCIATION OF LANDSCAPE PROFESSIONALS
Foundation
Employee Compensation
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.

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
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.

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

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

*indicates sample size less than 20

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

Less than 10 employees (A)
- n=46

10 to 99 employees (B)
- n=113

100 or more employees (C)
- n=36
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

<table>
<thead>
<tr>
<th>Position</th>
<th>Retirement Plan Offered</th>
</tr>
</thead>
<tbody>
<tr>
<td>Arborist or other Professionals</td>
<td>73%</td>
</tr>
<tr>
<td>Designers</td>
<td>71%</td>
</tr>
<tr>
<td>Executives</td>
<td>69%</td>
</tr>
<tr>
<td>Project Managers</td>
<td>68%</td>
</tr>
<tr>
<td>Management Positions</td>
<td>63%</td>
</tr>
<tr>
<td>Inside staff (office, etc.)</td>
<td>63%</td>
</tr>
<tr>
<td>Laborers</td>
<td>46%</td>
</tr>
</tbody>
</table>

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
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.

Note: Sample size varies by position
Employee Compensation: 

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.

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

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

Note: Small sample sizes
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*

<table>
<thead>
<tr>
<th>Position</th>
<th>Less than 10 employees (A)</th>
<th>10 to 99 employees (B)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Executives</td>
<td>78%</td>
<td>71%</td>
</tr>
<tr>
<td>Management Positions</td>
<td>52%</td>
<td>43%</td>
</tr>
<tr>
<td>Inside Staff</td>
<td>26%</td>
<td>29%</td>
</tr>
<tr>
<td>Project Managers</td>
<td>26%</td>
<td>25%</td>
</tr>
<tr>
<td>Designers</td>
<td>0%</td>
<td>14%</td>
</tr>
<tr>
<td>Arborist or other</td>
<td>17%</td>
<td>43%</td>
</tr>
<tr>
<td>professionals</td>
<td>43%</td>
<td>6%</td>
</tr>
<tr>
<td>Laborers</td>
<td>4%</td>
<td>6%</td>
</tr>
</tbody>
</table>

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

*Note: Small sample sizes*
Sales: Size of Sales Role in Other Positions

- Among Executives who handle 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**

- Executives
  - Less than 10 employees: 71%
  - 10 to 99 employees: 65%
  - Total: 68%

- Management Positions
  - Less than 10 employees: 65%
  - 10 to 99 employees: 73%
  - Total: 71%

- Inside Staff
  - Less than 10 employees: 29%
  - 10 to 99 employees: 33%
  - Total: 33%

- Project Managers
  - Less than 10 employees: 33%
  - 10 to 99 employees: 67%
  - Total: 67%

- Designers
  - Less than 10 employees: 43%
  - 10 to 99 employees: 50%
  - Total: 41%

- Arborist/Professionals
  - Less than 10 employees: 88%
  - 10 to 99 employees: 85%
  - Total: 95%

- Laborers
  - Less than 10 employees: 99%
  - 10 to 99 employees: 99%
  - Total: 99%

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]

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
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.

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

Note: Small sample sizes
Employee Education
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**

<table>
<thead>
<tr>
<th></th>
<th>Less than 10 employees (A)</th>
<th>10 to 99 employees (B)</th>
<th>100 or more employees (C)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Post-graduate degree</td>
<td>4%</td>
<td>6%</td>
<td>28%</td>
</tr>
<tr>
<td>At least some post-graduate school</td>
<td>30%</td>
<td>67%</td>
<td>17%</td>
</tr>
<tr>
<td>4 year college degree</td>
<td>17%</td>
<td>8%</td>
<td>12%</td>
</tr>
<tr>
<td>Associate’s degree</td>
<td>17%</td>
<td>27%</td>
<td>19%</td>
</tr>
<tr>
<td>Some college</td>
<td>23%</td>
<td>19%</td>
<td>23%</td>
</tr>
<tr>
<td>High school</td>
<td>19%</td>
<td>12%</td>
<td>6%</td>
</tr>
<tr>
<td>Some high school or less</td>
<td>9%</td>
<td>5%</td>
<td>2%</td>
</tr>
<tr>
<td>Prefer not to answer</td>
<td>2%</td>
<td>2%</td>
<td>2%</td>
</tr>
</tbody>
</table>

**Typical Educational Qualifications for MANAGEMENT POSITIONS**

<table>
<thead>
<tr>
<th></th>
<th>Less than 10 employees (A)</th>
<th>10 to 99 employees (B)</th>
<th>100 or more employees (C)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Post-graduate degree</td>
<td>23%</td>
<td>26%</td>
<td>28%</td>
</tr>
<tr>
<td>At least some post-graduate school</td>
<td>19%</td>
<td>15%</td>
<td>17%</td>
</tr>
<tr>
<td>4 year college degree</td>
<td>23%</td>
<td>15%</td>
<td>44%</td>
</tr>
<tr>
<td>Associate’s degree</td>
<td>23%</td>
<td>15%</td>
<td>17%</td>
</tr>
<tr>
<td>Some college</td>
<td>23%</td>
<td>15%</td>
<td>17%</td>
</tr>
<tr>
<td>High school</td>
<td>19%</td>
<td>15%</td>
<td>17%</td>
</tr>
<tr>
<td>Some high school or less</td>
<td>12%</td>
<td>15%</td>
<td>17%</td>
</tr>
<tr>
<td>Prefer not to answer</td>
<td>2%</td>
<td>2%</td>
<td>2%</td>
</tr>
</tbody>
</table>

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**

<table>
<thead>
<tr>
<th>Position</th>
<th>Very Easy</th>
<th>Somewhat Easy</th>
<th>Neither Easy nor Difficult</th>
<th>Somewhat Difficult</th>
<th>Very Difficult</th>
</tr>
</thead>
<tbody>
<tr>
<td>Executives</td>
<td>6%</td>
<td>29%</td>
<td>44%</td>
<td>1%</td>
<td>1%</td>
</tr>
<tr>
<td>Management Positions</td>
<td>7%</td>
<td>16%</td>
<td>31%</td>
<td>17%</td>
<td>1%</td>
</tr>
<tr>
<td>Project Managers</td>
<td>8%</td>
<td>43%</td>
<td>31%</td>
<td>31%</td>
<td>1%</td>
</tr>
<tr>
<td>Arborist or other Professionals</td>
<td>12%</td>
<td>27%</td>
<td>24%</td>
<td>36%</td>
<td>1%</td>
</tr>
<tr>
<td>Designers</td>
<td>15%</td>
<td>27%</td>
<td>23%</td>
<td>32%</td>
<td>1%</td>
</tr>
<tr>
<td>Laborers</td>
<td>14%</td>
<td>17%</td>
<td>19%</td>
<td>47%</td>
<td>20%</td>
</tr>
<tr>
<td>Inside staff (office, etc.)</td>
<td>10%</td>
<td>31%</td>
<td>35%</td>
<td>20%</td>
<td>4%</td>
</tr>
</tbody>
</table>

**n=195**

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

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

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.

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

n=195
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.
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

<table>
<thead>
<tr>
<th>Position</th>
<th>TOTAL</th>
<th>Less than 10 employees</th>
<th>10 to 99 employees</th>
<th>100 or more employees</th>
</tr>
</thead>
<tbody>
<tr>
<td>Laborers</td>
<td>17.1</td>
<td>2.2</td>
<td>0.9</td>
<td>0.3</td>
</tr>
<tr>
<td>Inside staff (office, etc.)</td>
<td>6.7</td>
<td>0.9</td>
<td>0.3</td>
<td>0.7</td>
</tr>
<tr>
<td>Management Positions</td>
<td>1.0</td>
<td>0.2</td>
<td>0.8</td>
<td>0.8</td>
</tr>
<tr>
<td>Project Managers</td>
<td>0.9</td>
<td>0.2</td>
<td>0.8</td>
<td>0.1</td>
</tr>
<tr>
<td>Designers</td>
<td>0.3</td>
<td>0.1</td>
<td>0.4</td>
<td>0.5</td>
</tr>
<tr>
<td>Arborist or other Professionals</td>
<td>0.6</td>
<td>0.1</td>
<td>0.5</td>
<td>1.4</td>
</tr>
<tr>
<td>Executives</td>
<td>0.1</td>
<td>0.0</td>
<td>0.0</td>
<td>0.2</td>
</tr>
</tbody>
</table>

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

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]
## Landscape Industry: Number of Hires in Next Year Estimate

### Landscape Industry: Estimated Number of Hires

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

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

**Respondent Title**
*By Company Size*

<table>
<thead>
<tr>
<th>Title</th>
<th>Less than 10 employees (A)</th>
<th>10 to 99 employees (B)</th>
<th>100 or more employees (C)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Owner</td>
<td>6%</td>
<td>26%</td>
<td>48%</td>
</tr>
<tr>
<td>President</td>
<td>2%</td>
<td>14%</td>
<td>37%</td>
</tr>
<tr>
<td>CEO</td>
<td>8%</td>
<td>11%</td>
<td>11%</td>
</tr>
<tr>
<td>Vice President</td>
<td>2%</td>
<td>8%</td>
<td>42%</td>
</tr>
<tr>
<td>HR position (Director and others)</td>
<td>1%</td>
<td>0%</td>
<td>11%</td>
</tr>
<tr>
<td>Manager (General, Senior, Business, Operations, Production)</td>
<td>2%</td>
<td>0%</td>
<td>7%</td>
</tr>
<tr>
<td>Office (Office Manager, Admin Assistant)</td>
<td>0%</td>
<td>2%</td>
<td>5%</td>
</tr>
<tr>
<td>CFO or other finance/accounting</td>
<td>2%</td>
<td>5%</td>
<td>6%</td>
</tr>
<tr>
<td>COO</td>
<td>2%</td>
<td>2%</td>
<td>6%</td>
</tr>
<tr>
<td>Director (creative and others)</td>
<td>2%</td>
<td>2%</td>
<td>3%</td>
</tr>
<tr>
<td>Sales / Customer service</td>
<td>2%</td>
<td>2%</td>
<td>3%</td>
</tr>
<tr>
<td>Other</td>
<td>4%</td>
<td>3%</td>
<td>7%</td>
</tr>
</tbody>
</table>

**Respondent Gender**
*By Company Size*

<table>
<thead>
<tr>
<th>Gender</th>
<th>Less than 10 employees (A)</th>
<th>10 to 99 employees (B)</th>
<th>100 or more employees (C)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Male</td>
<td>89%</td>
<td>78%</td>
<td>72%</td>
</tr>
<tr>
<td>Female</td>
<td>11%</td>
<td>22%</td>
<td>28%</td>
</tr>
</tbody>
</table>

**Questions:**
- Are you... 
- 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.

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**

<table>
<thead>
<tr>
<th>Company Size</th>
<th>Commercial</th>
<th>Residential</th>
</tr>
</thead>
<tbody>
<tr>
<td>Less than 10 employees (A)</td>
<td>26%</td>
<td>74% BC</td>
</tr>
<tr>
<td>10 to 99 employees (B)</td>
<td>39% A</td>
<td>61% C</td>
</tr>
<tr>
<td>100 or more employees (C)</td>
<td>79% AB</td>
<td>21%</td>
</tr>
</tbody>
</table>

### Company Income

**By Company Size**

<table>
<thead>
<tr>
<th>Income Range</th>
<th>Less than 10 employees (A)</th>
<th>10 to 99 employees (B)</th>
<th>100 or more employees (C)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Less than $500,000</td>
<td>6%</td>
<td>0%</td>
<td>80% BC</td>
</tr>
<tr>
<td>$500,000 to less than $1 million</td>
<td>13%</td>
<td>23% C</td>
<td>0%</td>
</tr>
<tr>
<td>$1 million to less than $1.5 million</td>
<td>3%</td>
<td>18% AC</td>
<td>0%</td>
</tr>
<tr>
<td>$1.5 million to less than $2 million</td>
<td>0%</td>
<td>0%</td>
<td>12% AC</td>
</tr>
<tr>
<td>$2 million to less than $2.5 million</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
</tr>
<tr>
<td>$2.5 million or more</td>
<td>6%</td>
<td>9% A</td>
<td>31% A</td>
</tr>
<tr>
<td>Prefer not to answer</td>
<td>2%</td>
<td>1%</td>
<td>6%</td>
</tr>
</tbody>
</table>

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

- **Less than 10 employees (A)**
  - n = 46
  - 11% ALL Residential Revenue (100% Commercial)
  - 67% Mostly Residential (51-99% Residential)
  - 9% Equal (50% Residential/50% Commercial)
  - 11% Mostly Commercial (51-99% Commercial)
  - 2% ALL Commercial Revenue (100% Commercial)

- **10 to 99 employees (B)**
  - n = 113
  - 4% ALL Residential Revenue (100% Commercial)
  - 60% Mostly Residential (51-99% Residential)
  - 3% Equal (50% Residential/50% Commercial)
  - 27% Mostly Commercial (51-99% Commercial)
  - 5% ALL Commercial Revenue (100% Commercial)

- **100 or more employees (C)**
  - n = 36
  - 14% ALL Residential Revenue (100% Commercial)
  - 64% Mostly Residential (51-99% Residential)
  - 22% Mostly Commercial (51-99% Commercial)

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**

- **Northeast**
  - Less than 10 employees: 8%
  - 10 to 99 employees: 27%
  - 100 or more employees: 17%

- **Midwest**
  - Less than 10 employees: 28%
  - 10 to 99 employees: 39%
  - 100 or more employees: 35%

- **South**
  - Less than 10 employees: 32%
  - 10 to 99 employees: 36%
  - 100 or more employees: 35%

- **West**
  - Less than 10 employees: 4%
  - 10 to 99 employees: 13%
  - 100 or more employees: 17%

**Company Age By Company Size**

- **Less than 10 years**
  - Less than 10 employees: 3%
  - 10 to 99 employees: 19%
  - 100 or more employees: 17%

- **10 to 19 years**
  - Less than 10 employees: 20%
  - 10 to 99 employees: 19%
  - 100 or more employees: 19%

- **20 to 29 years**
  - Less than 10 employees: 26%
  - 10 to 99 employees: 25%
  - 100 or more employees: 22%

- **30 to 39 years**
  - Less than 10 employees: 34%
  - 10 to 99 employees: 19%
  - 100 or more employees: 19%

- **40 to 49 years**
  - Less than 10 employees: 22%
  - 10 to 99 employees: 13%
  - 100 or more employees: 4%

- **50 years or more**
  - Less than 10 employees: 17%
  - 10 to 99 employees: 6%
  - 100 or more employees: 17%

**Average Age of Company**

- Less than 10 employees: 13.4 years
- 10 to 99 employees: 24.5 years
- 100 or more employees: 33.6 years

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