



# Landscape Industry Careers – Industry Report

*June 2015*

*Prepared for:*



# The Stevenson Company

## National Recognition

- Nationally recognized research firm with expertise in home improvement and outdoor power equipment, as well as industries providing services for owners of residential and commercial properties.
- Clients manufacture and sell products and services through dealers, distributors, installers and other middle entities and not always directly to the end consumer.

## Experienced in B2B

- Well-versed in conducting business-to-business (B2B) research with national, regional and independent firms. Examples of the industries that we support include major appliances, home construction and remodeling, outdoor power equipment, mattresses, consumer electronics, HVAC and other home systems.
- Our strategic research team has worked extensively with clients that provide services such as landscaping to understand customer thoughts, wants and needs.

## Partner with Trade Associations

- History of working with trade associations to manage industry data and statistics.
- Continually provide research and analysis to many of our trade association partners.



# BACKGROUND & METHODOLOGY

# Background

National Association of Landscape Professionals Foundation, the industry association for landscape industry professionals, is looking for ways to attract a more educated and experienced workforce into their management ranks. Their belief is that a stereotype exists among potential target employees where the industry is seen as primarily a labor-intensive, less-educated workforce and not worthy of consideration. The Foundation is developing a strategic plan that will attract high-quality employees to the industry.

As an input to their plan, the Foundation wanted to better understand the career options and needs in the landscape industry from landscaper firms, including the number and mix of positions (particularly management), education needs, and opportunities for long-term career growth.

# 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

# Methodology & Sample Plan

An online study was conducted with PLANET 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

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.

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

# 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:

	<b>Total Interviews</b>
Less than 10 Employees	8
10 to 99 Employees	27
100 or More Employees	9
<b>Total</b>	<b>44</b>

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.**

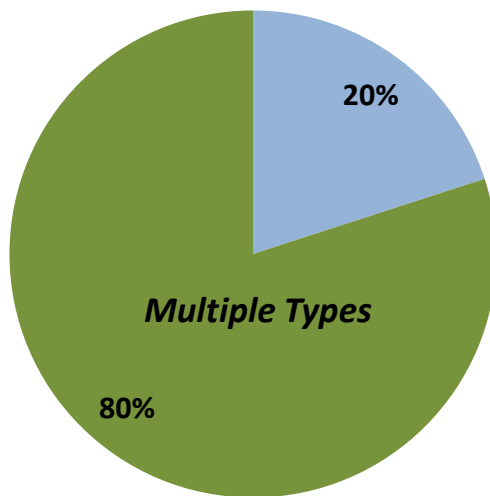
- An associate's degree or some college is the least amount of education recommended.
- Half or more who responded to the survey have a college degree or higher.

# Survey Industry Overview

# Firm Job Mix

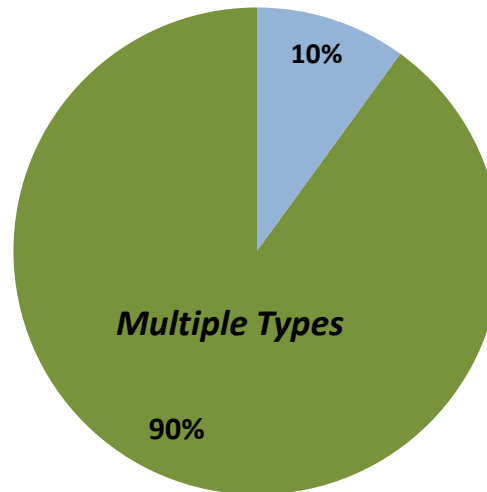
➤ The vast majority of all landscape industry firms perform multiple types of jobs rather than specializing in only one type.

Job Mix – Multiple Types  
Less than 10 Employees



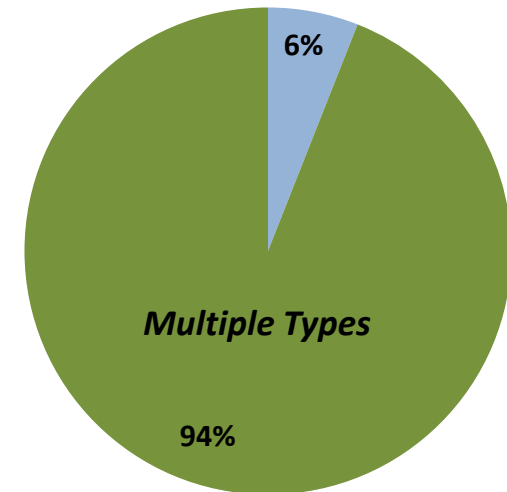
n=46

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

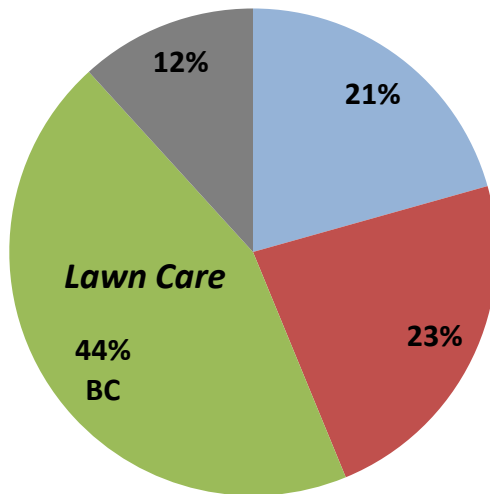
Q. What % of your total revenues would you say are from the following?



# Firm Average Job Mix

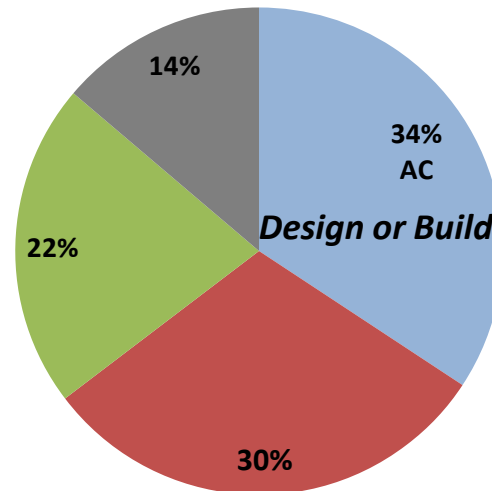
➤ There are significant differences in job mix by size of company. The smallest companies are most concentrated in Lawn Care, the medium companies most concentrated in Design or Build, and the largest companies most concentrated in Landscape Management.

Average Job Mix  
Less than 10 Employees



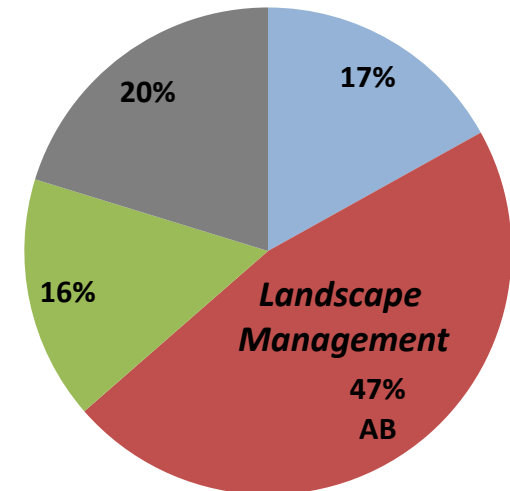
n=46

Average Job Mix  
10 to 99 Employees



n=113

Average Job Mix  
100 or More Employees



n=36

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

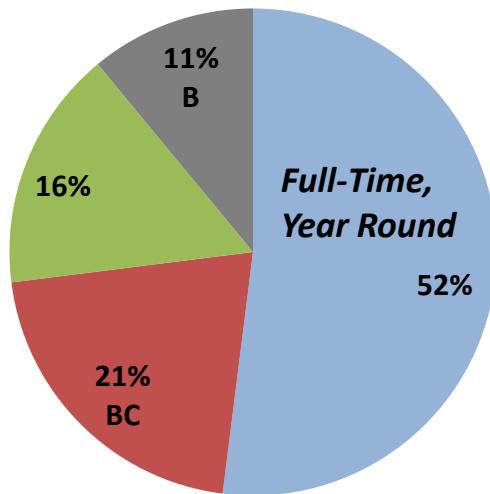
Q. What % of your total revenues would you say are from the following?



# Firm Employee Mix

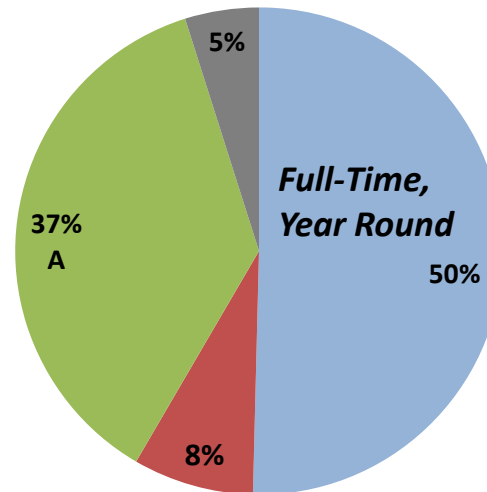
➤ About half of employees are full-time, year round employees. Companies with 10 or more employees have a higher mix of full-time seasonal employees than those with less than 10 employees. These smallest companies have a higher mix of part-time, year round employees.

Average Employee Mix  
Less than 10 Employees



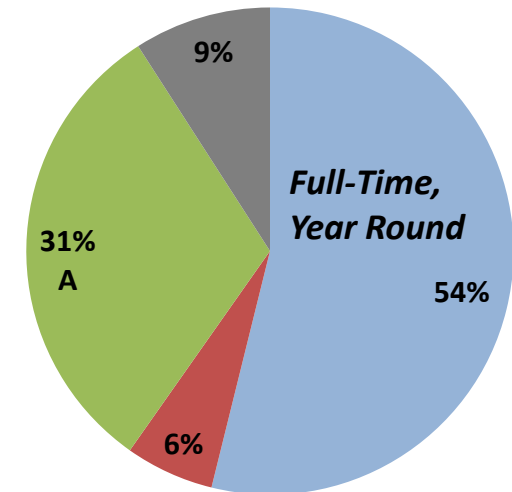
n=46

Average Employee Mix  
10 to 99 Employees



n=113

Average Employee Mix  
100 or More Employees



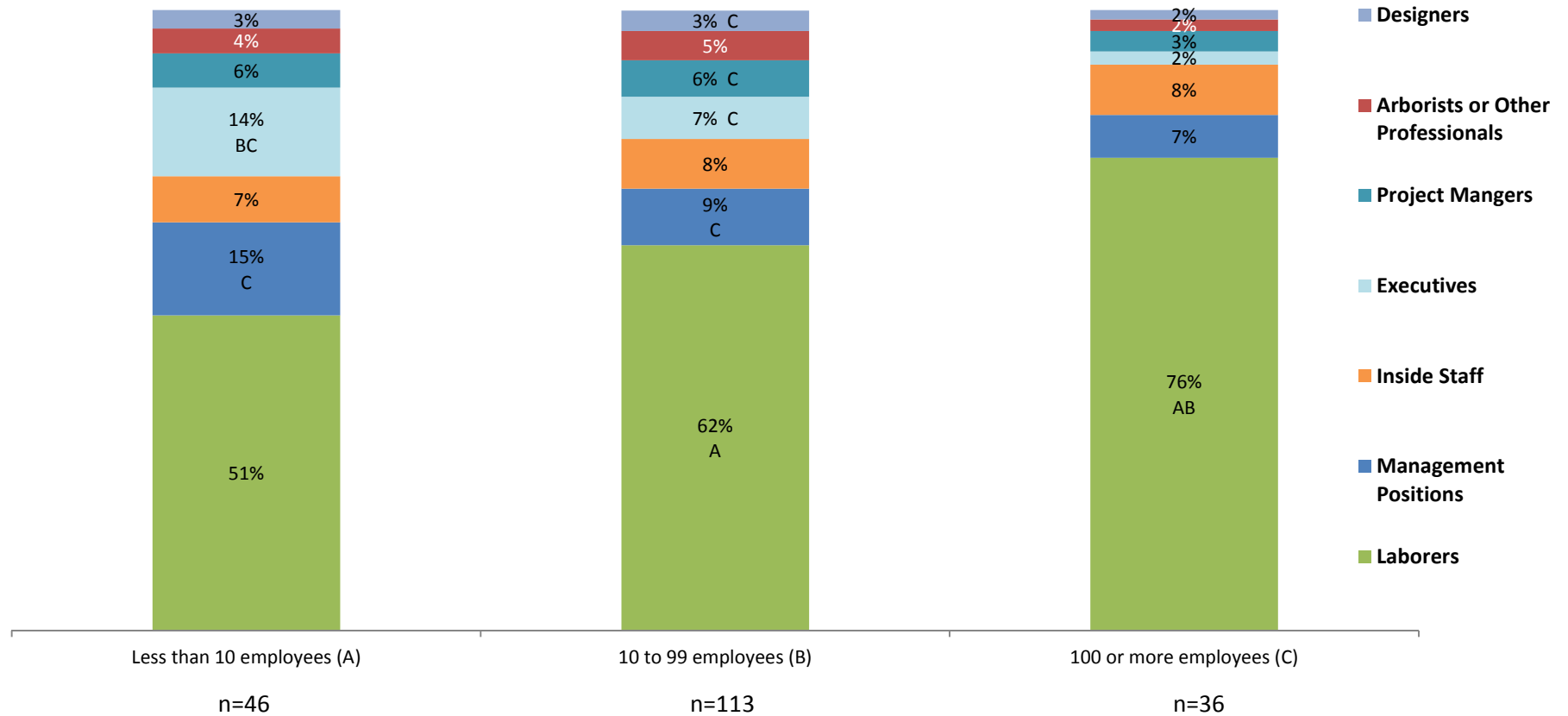
n=36

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

# 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.

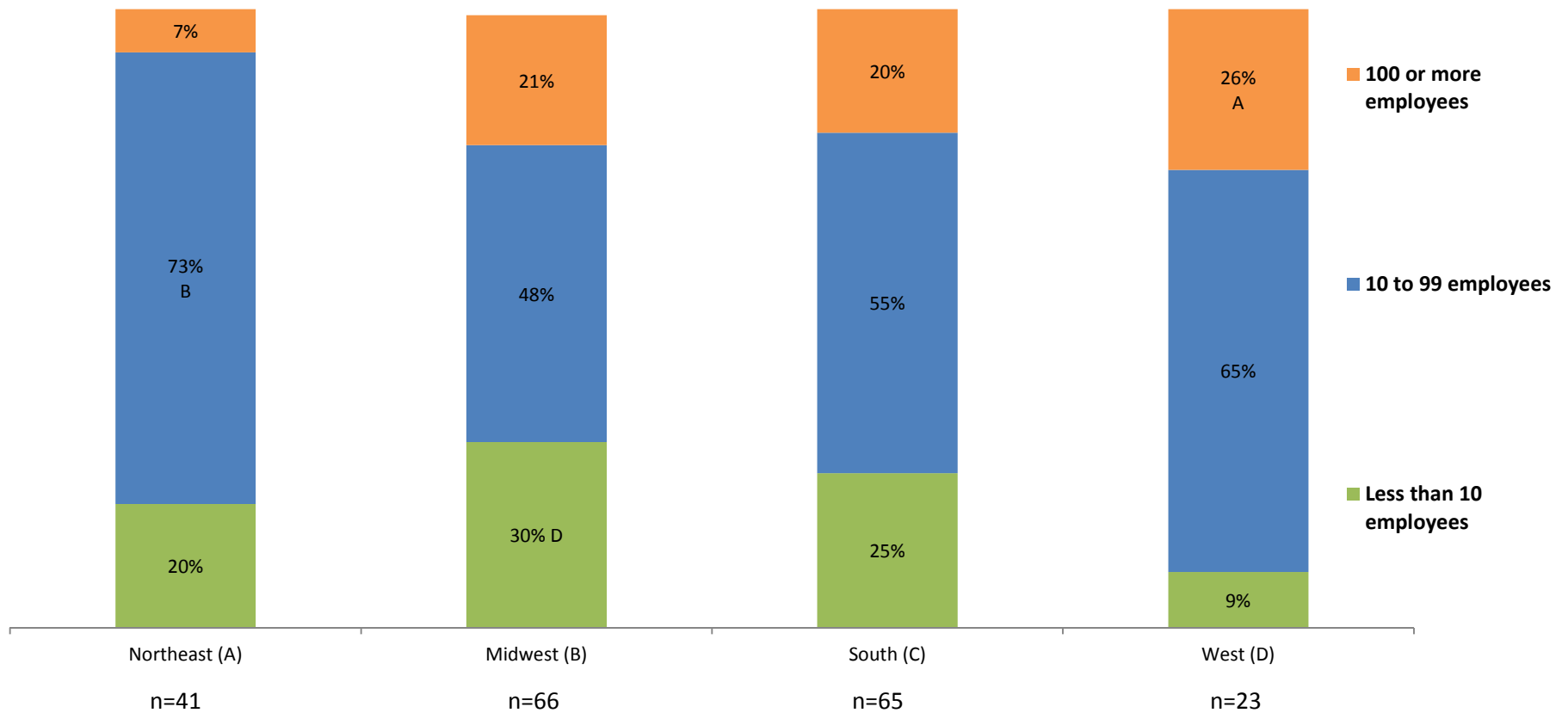
Average Position Mix  
By Company Size



# 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

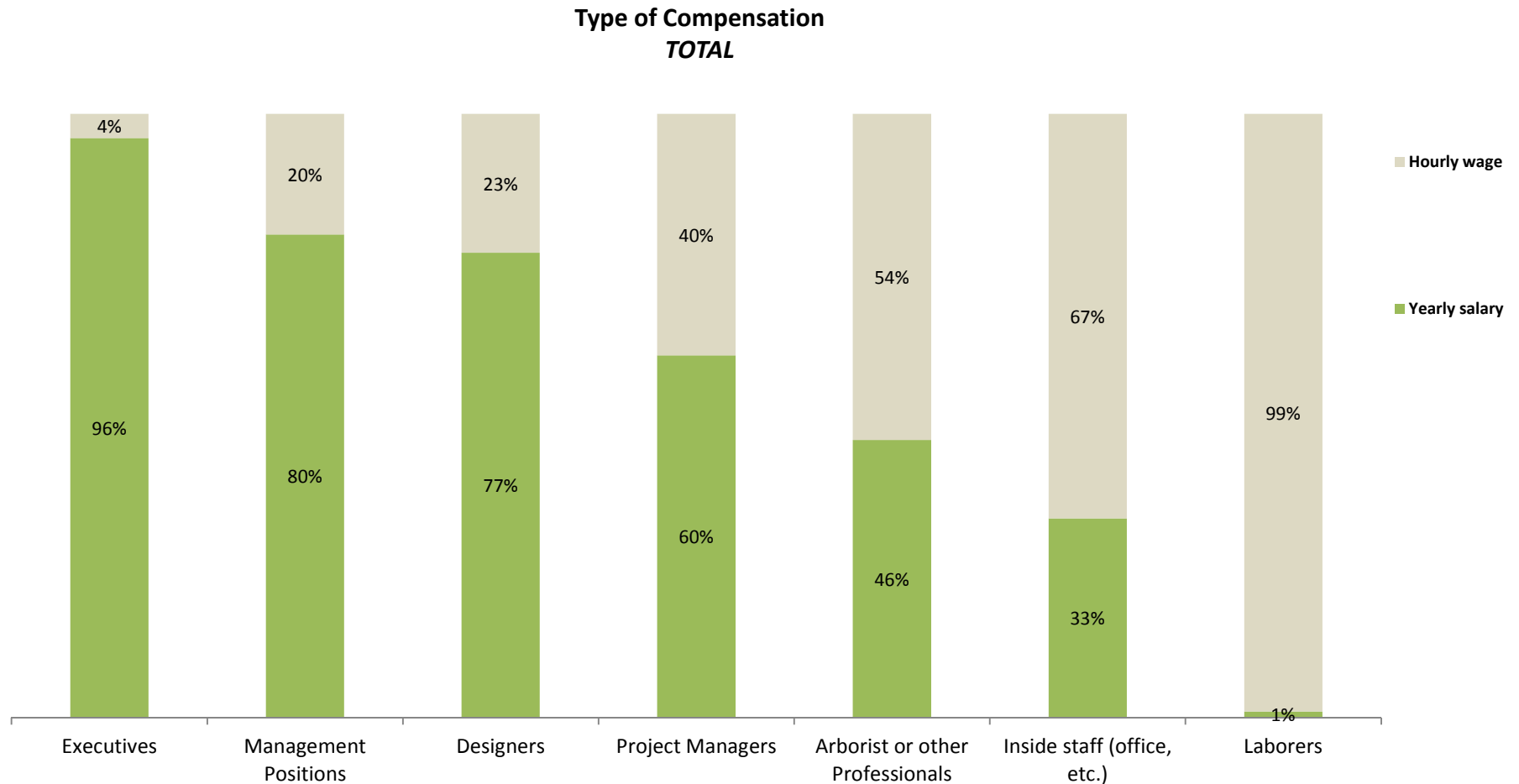


# Employee Compensation



# 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.



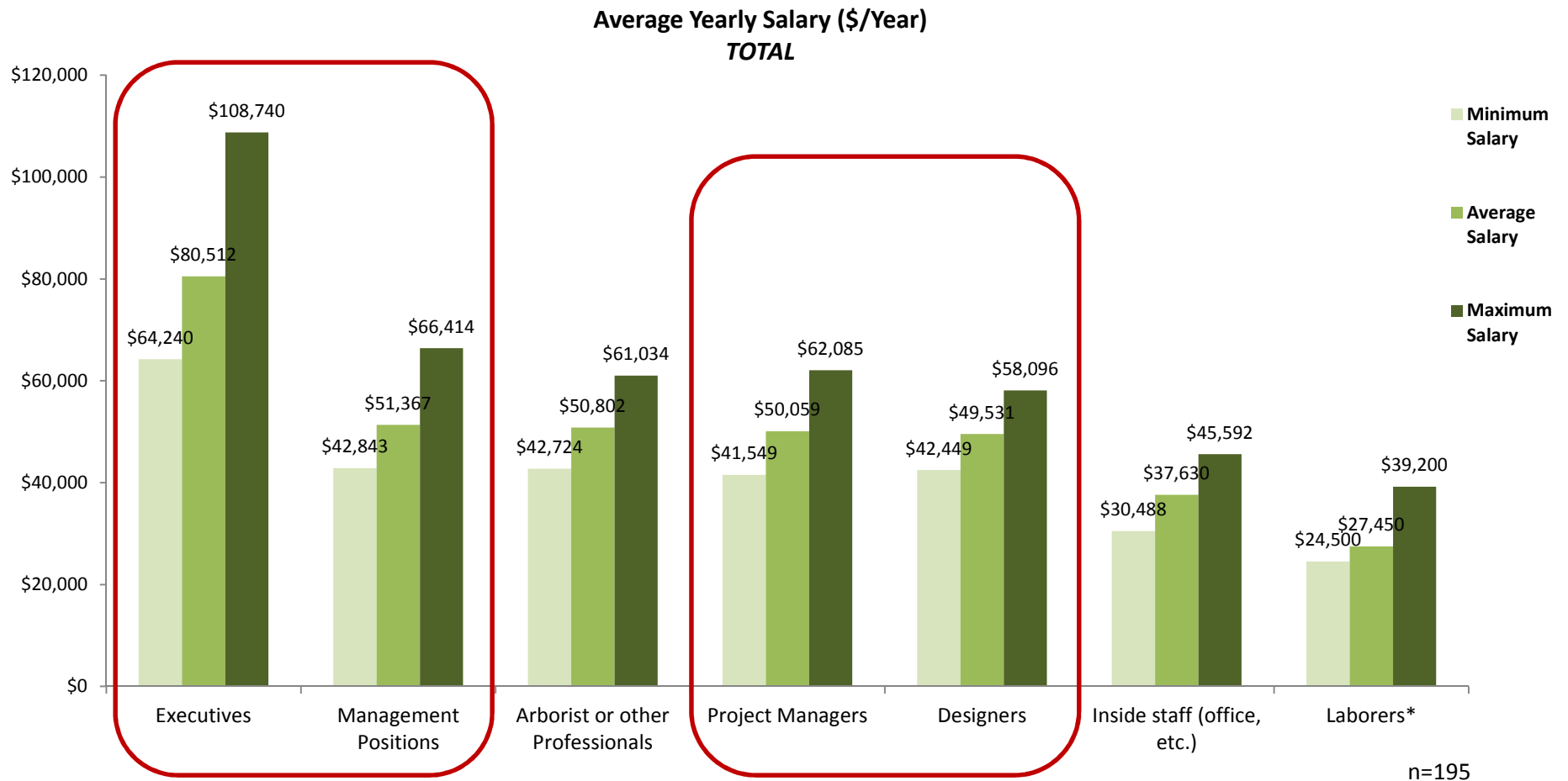
Q. For each of the positions, please indicate how each position is typically compensated (hourly wages versus salary), typical education needed for that position, and if that position typically offers retirement and health insurance.

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.



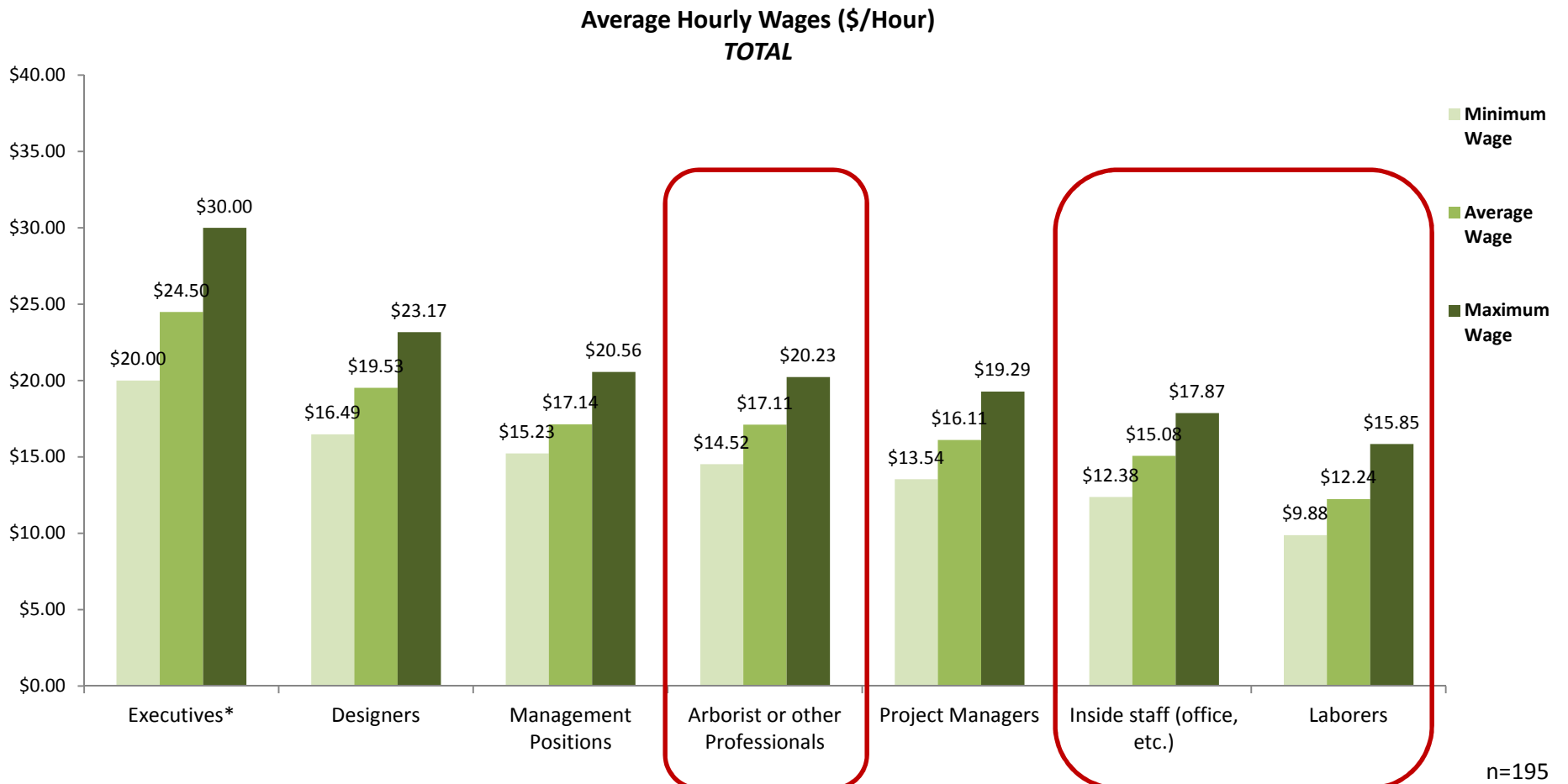
Note: Sample size varies by position  
\*indicates sample size less than 20

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.

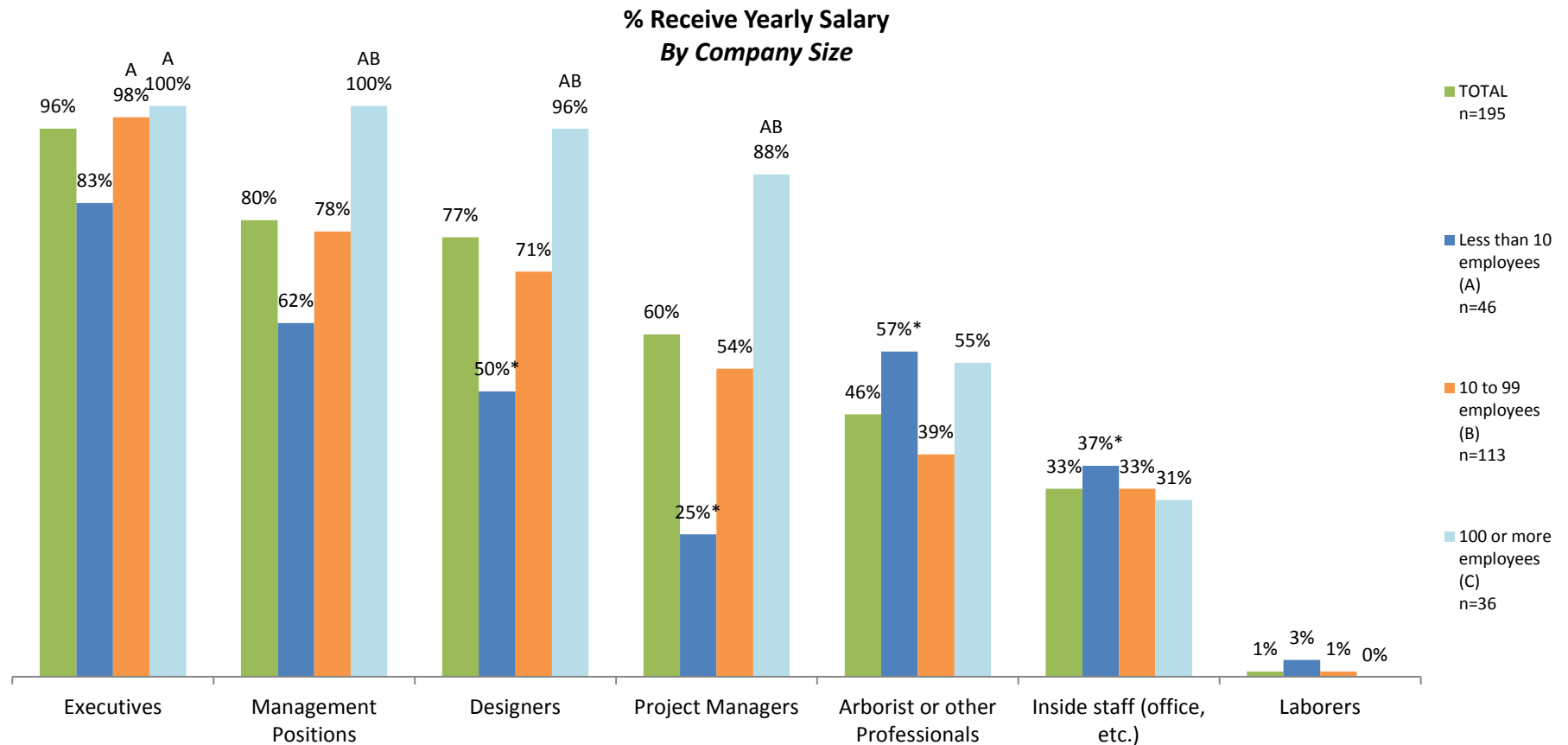


Note: Sample size varies by position  
\*indicates sample size less than 20

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

# 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

# Compensation by Position: Summary

➤ Compensation tends to be higher in larger companies, and in the Northeast and West census regions.

		Average Wage By Census Region				Average Wage By Company Size						
		Northeast (A)		Midwest (B)	South (C)	West (D)	Less than 10 Employees (A)	10-99 Employees (B)	100+ Employees (C)			
Laborers	Average Hourly Wage	\$ 13.51	BC	\$ 12.06	C	\$ 11.24	\$ 13.33	BC	\$ 11.69	\$ 12.61	AC	\$ 11.72
	Average Salary					\$ 27,450			\$ 27,600	\$ 27,300		
Executives	Average Hourly Wage	\$ 25.00		\$ 18.00		\$ 27.50			\$ 26.67	\$ 18.00		
	Average Salary	\$ 88,750		\$ 78,543		\$ 74,783	\$ 87,140		\$ 54,763	\$ 73,161	A	\$ 115,071
Management Positions	Average Hourly Wage	\$ 17.96	B	\$ 13.33		\$ 17.71	B	\$ 19.20	\$ 16.96	\$ 17.24		
	Average Salary	\$ 56,521	BC	\$ 49,482		\$ 47,756	\$ 58,786	BC	\$ 36,406	\$ 50,704	A	\$ 59,325
Project Managers	Average Hourly Wage	\$ 17.22		\$ 15.90		\$ 14.71		\$ 17.72	\$ 15.44	\$ 16.34		\$ 16.00
	Average Salary	\$ 55,462	C	\$ 48,763		\$ 46,238	\$ 55,833	C	\$ 34,000	\$ 50,061	A	\$ 52,152
Designers	Average Hourly Wage	\$ 23.79	D	\$ 17.80		\$ 18.38		\$ 17.00	\$ 15.67	\$ 20.32		\$ 17.00
	Average Salary	\$ 52,182		\$ 49,674		\$ 47,577	\$ 50,920		\$ 54,000	\$ 46,591		\$ 54,170
Arborist or other Professionals	Average Hourly Wage	\$ 16.64		\$ 17.44		\$ 17.67		\$ 16.40	\$ 18.00	\$ 17.06		\$ 16.91
	Average Salary	\$ 55,857	B	\$ 46,400		\$ 50,750	\$ 60,000		\$ 39,250	\$ 52,214		\$ 53,205
Inside staff (office, etc.)	Average Hourly Wage	\$ 16.20	BC	\$ 14.48		\$ 14.31		\$ 16.36	\$ 13.54	\$ 15.24		\$ 15.44
	Average Salary	\$ 41,600		\$ 35,326		\$ 37,385	\$ 38,250		\$ 29,429	\$ 38,581	A	\$ 40,170

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.

# Compensation by Position: Executives

➤ Executive pay increases with company size, with the average maximum salary at the largest companies more than double the average maximum salary at the smallest firms.

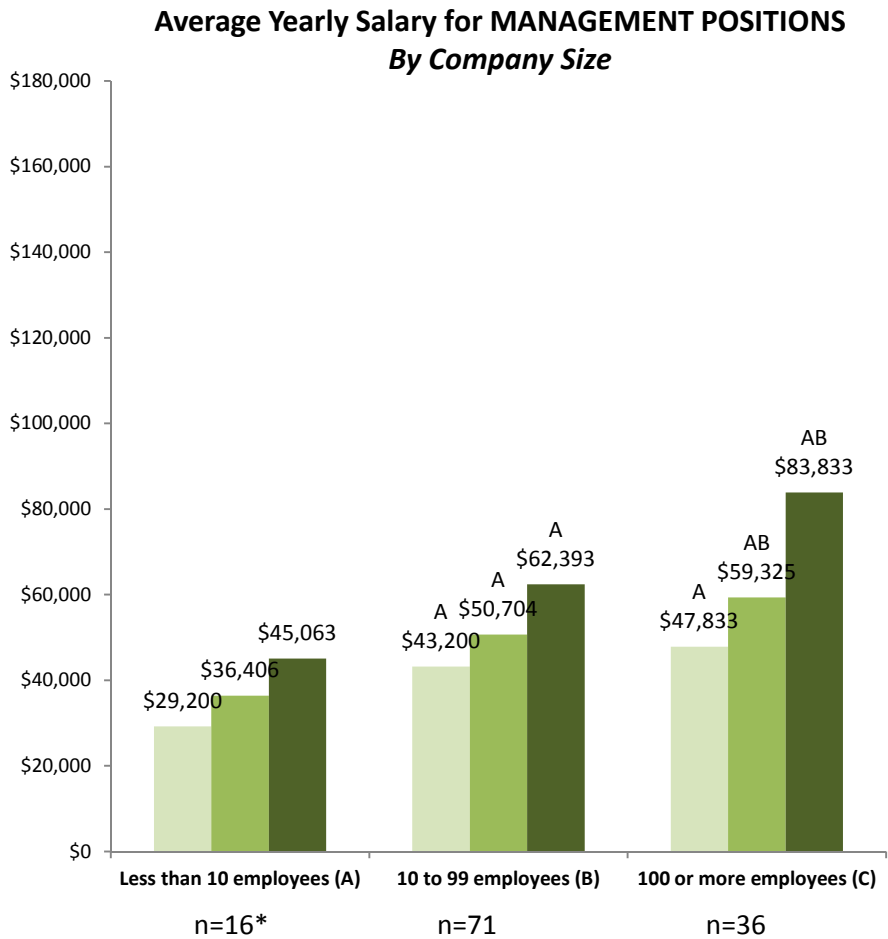


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\*indicates sample size less than 20

# Compensation by Position: Management Positions

➤ Management position pay increases with company size, with the largest companies paying an average maximum salary almost double that of the smallest companies.



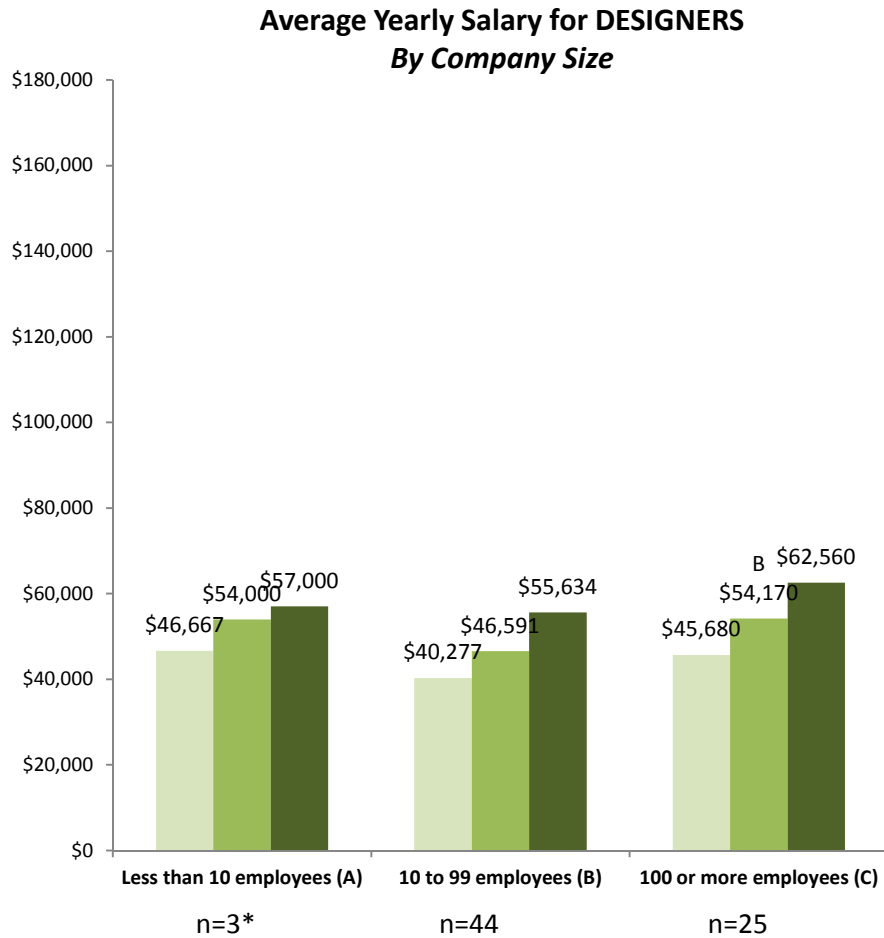
Q. For each of the positions, please indicate how each position is typically compensated (hourly wages versus salary), typical education needed for that position, and if that position typically offers retirement and health insurance.

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# Compensation by Position: Designers

➤ There are few differences in designer pay by company size. Also, the difference in average minimum and maximum designer salaries are comparatively small, differing by \$10,000 to \$17,000.



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.

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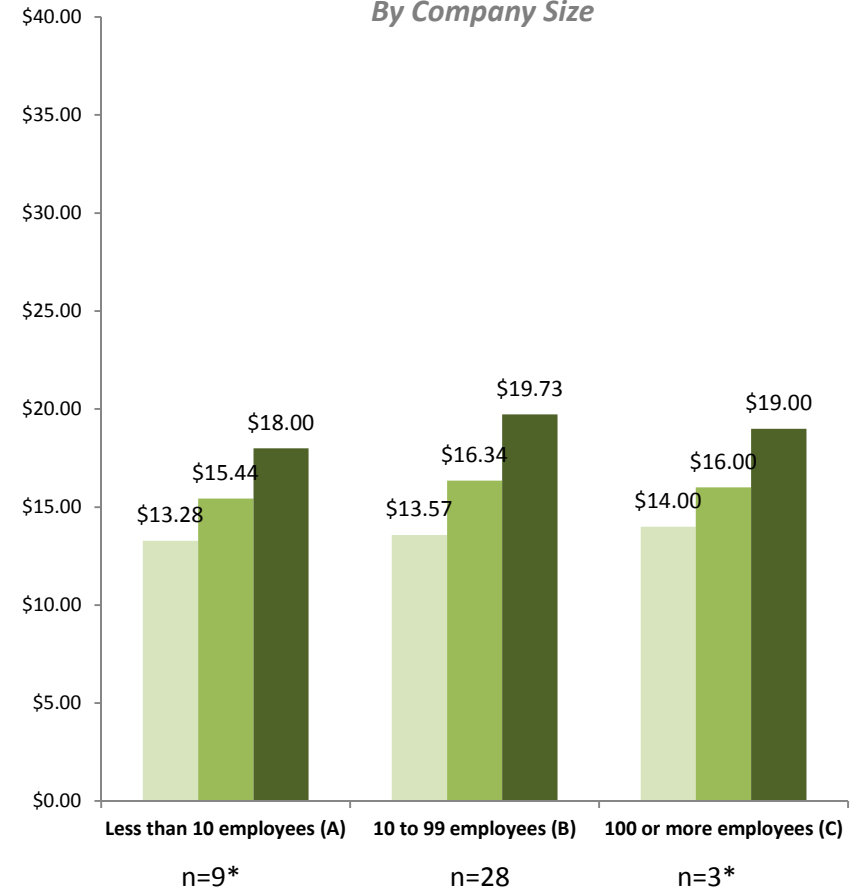
# Compensation by Position: Project Managers

➤ Project manager pay increases with companies with 10 or more employees. However, the differences in project manager salary by company size are not as wide as with executive and management position pay.

**Average Yearly Salary for PROJECT MANAGERS  
By Company Size**



**Average Hourly Wage for PROJECT MANAGERS  
By Company Size**



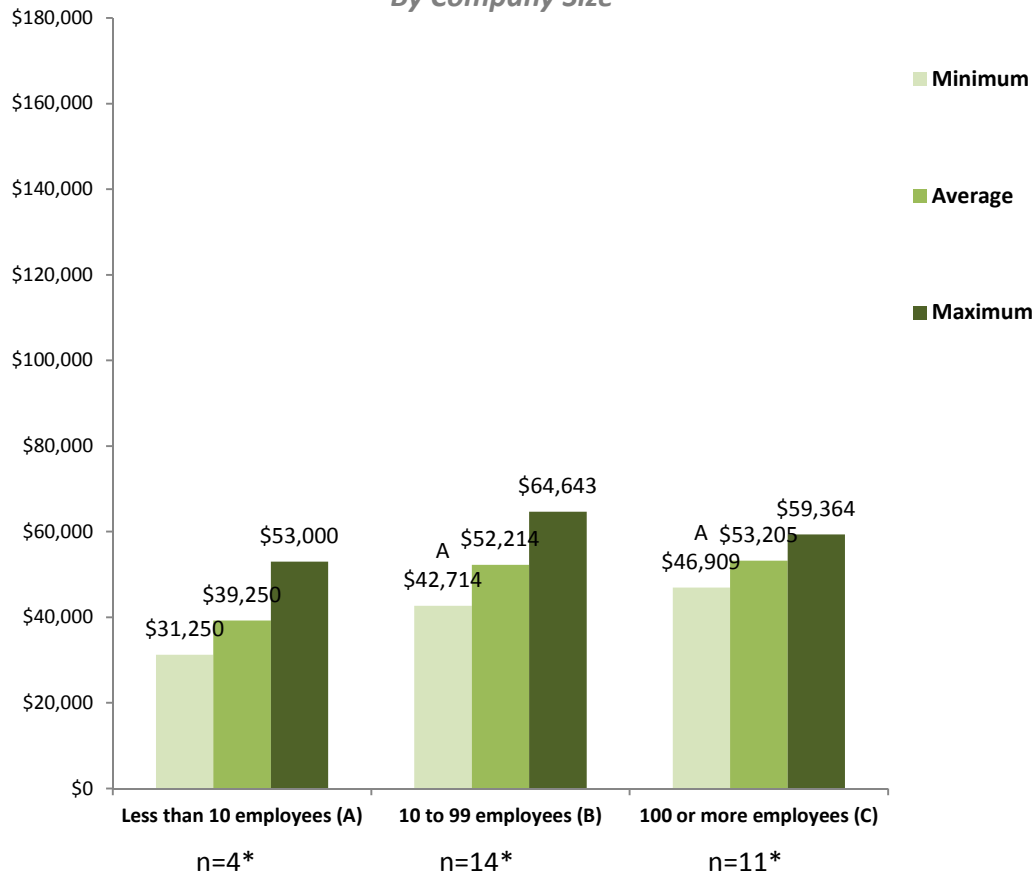
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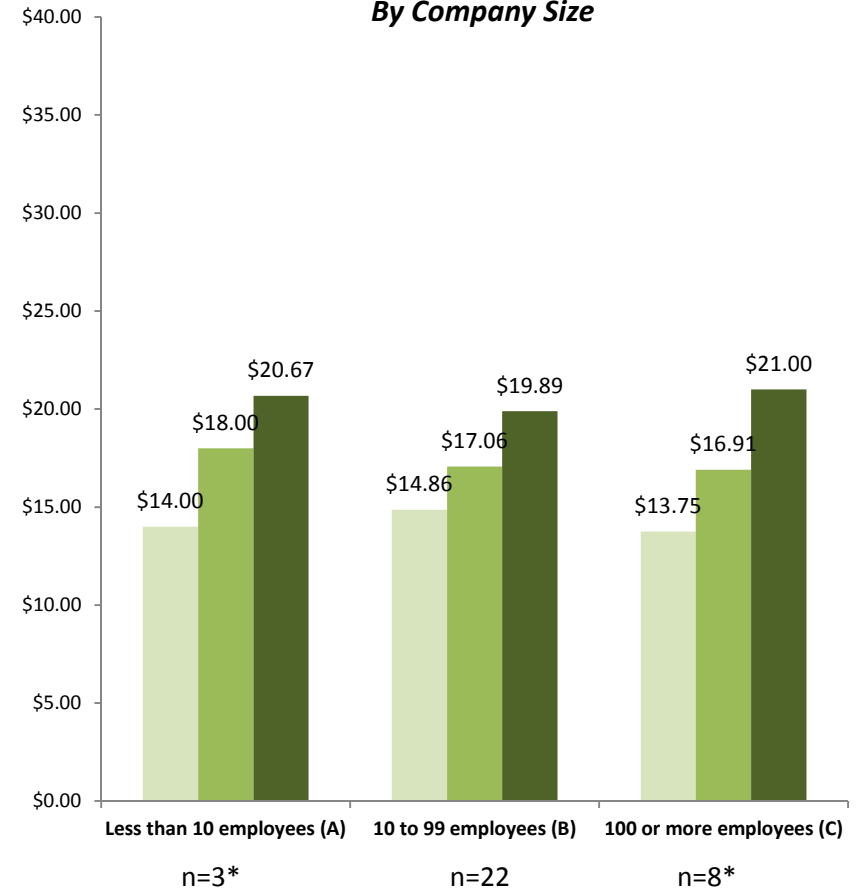
# Compensation by Position: Arborists

➤ There are few differences in arborist or other professional pay by company size.

Average Yearly Salary for ARBORISTS  
By Company Size



Average Hourly Wage for ARBORISTS  
By Company Size



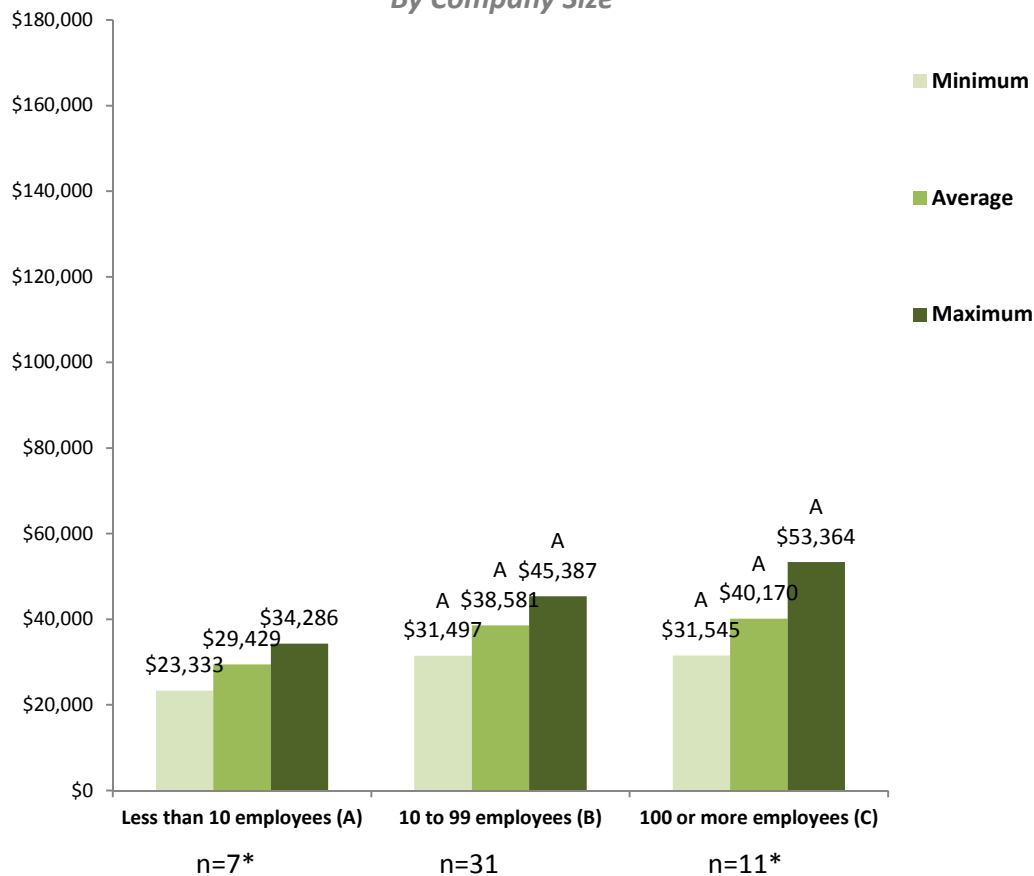
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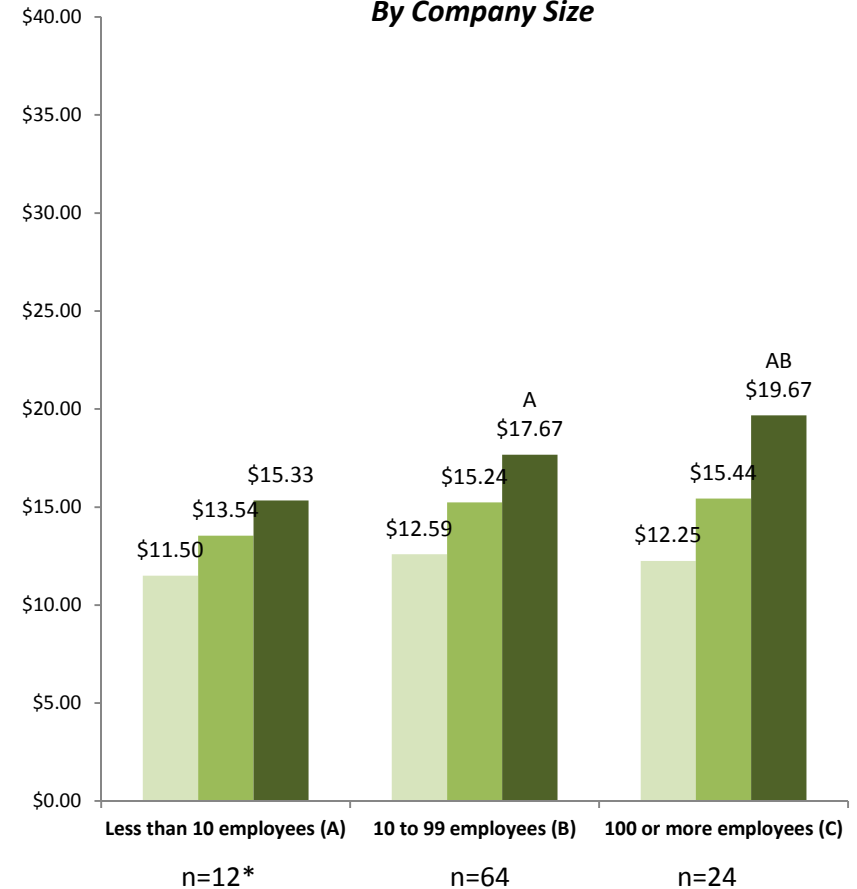
# Compensation by Position: Inside Staff

➤ Inside staff pay increases with companies with 10 or more employees. However, the differences in inside staff pay by company size are not as wide as with executive and management position pay.

Average Yearly Salary for INSIDE STAFF  
By Company Size



Average Hourly Wage for INSIDE STAFF  
By Company Size



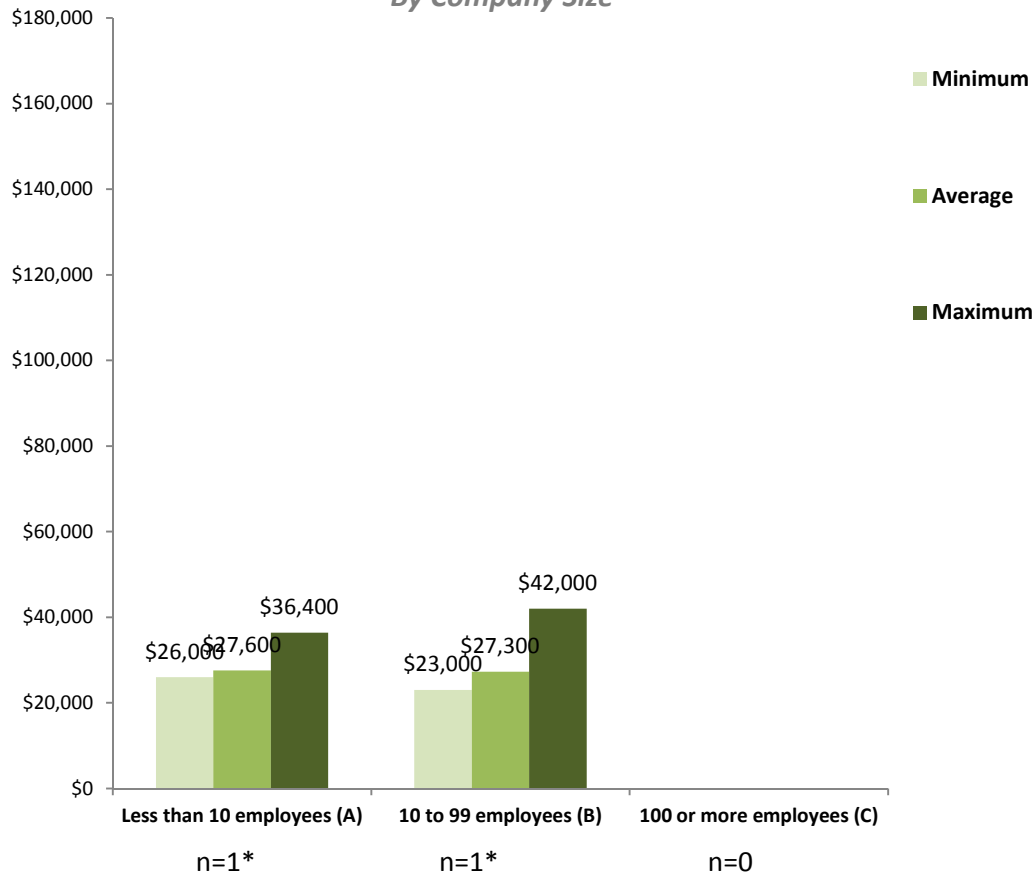
Q. For each of the positions, please indicate how each position is typically compensated (hourly wages versus salary), typical education needed for that position, and if that position typically offers retirement and health insurance.

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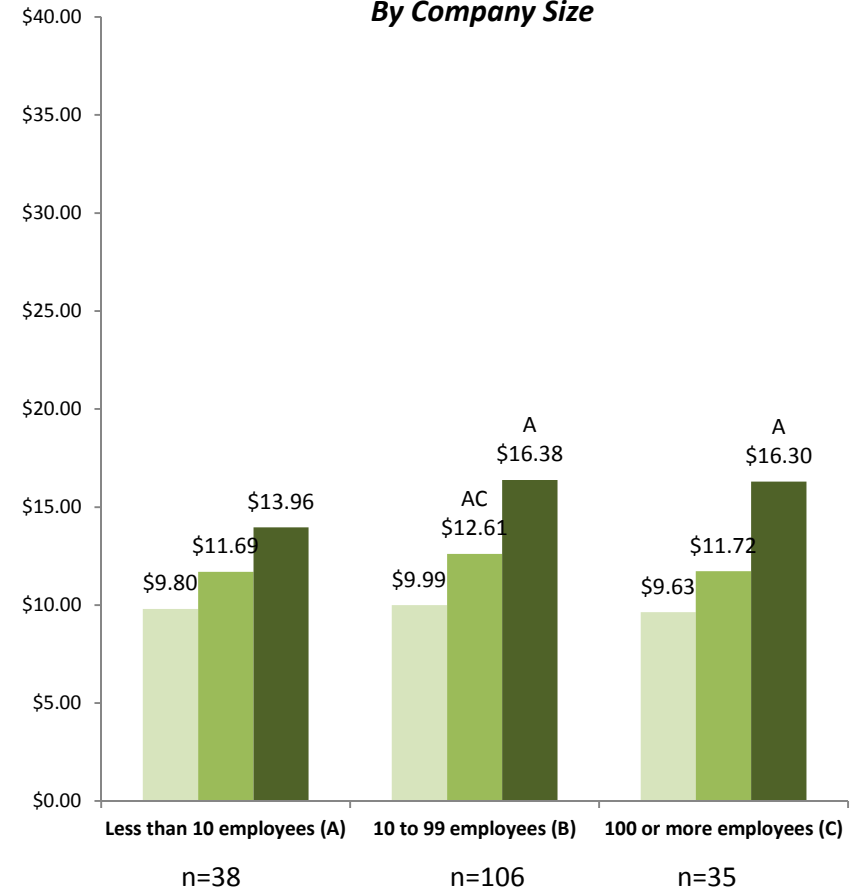
# Compensation by Position: Laborers

➤ There are few differences in laborer pay by company size, with the exception of the maximum hourly wage paid. While similar to other companies in the minimum and average wage, companies with less than 10 employees have a smaller maximum hourly wage.

Average Yearly Salary for LABORERS  
By Company Size



Average Hourly Wage for LABORERS  
By Company Size

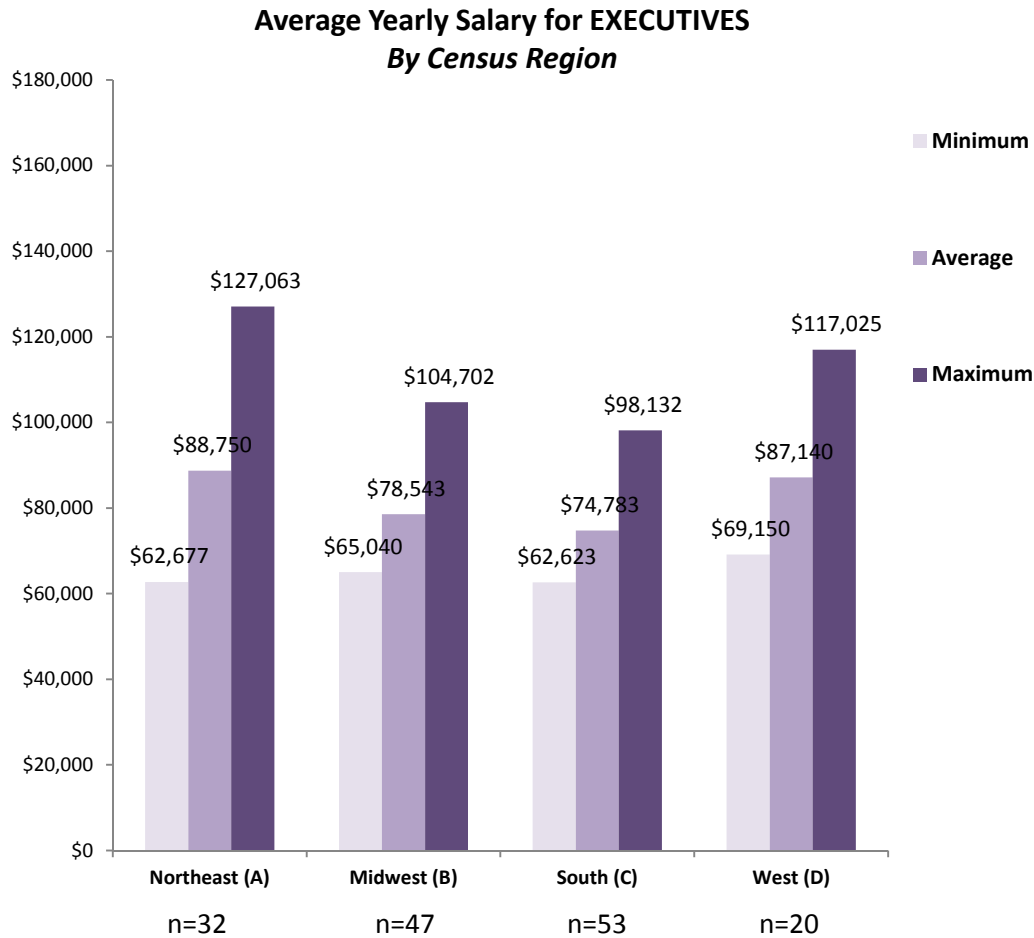


Q. For each of the positions, please indicate how each position is typically compensated (hourly wages versus salary), typical education needed for that position, and if that position typically offers retirement and health insurance.

\*indicates sample size less than 20

# Compensation by Position: Executives

➤ There are few differences in executive compensation by census region.



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.

\*indicates sample size less than 20

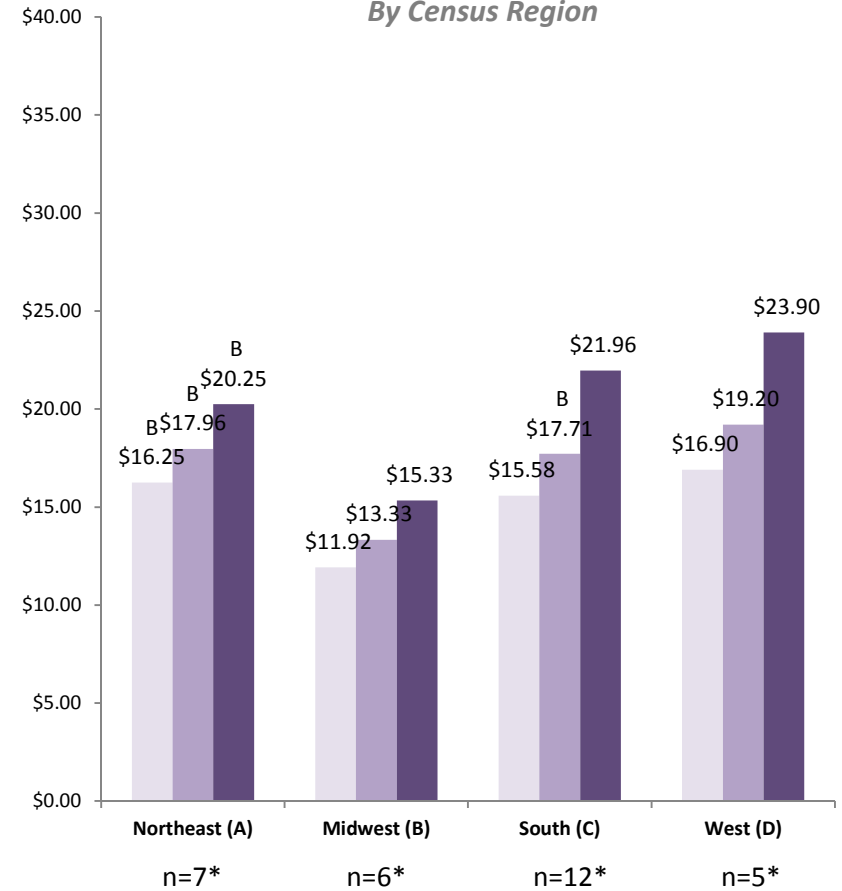
# Compensation by Position: Management Positions

➤ Management compensation tends to be lower in the Midwest and the South than in the Northeast or West.

**Average Yearly Salary for MANAGEMENT POSITIONS  
By Census Region**



**Average Hourly Wage for MANAGEMENT POSITIONS  
By Census Region**



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.

\*indicates sample size less than 20

# Compensation by Position: Designers

➤ There are few differences in designer pay by census region.

**Average Yearly Salary for DESIGNERS  
By Company Size**



**Average Hourly Wage for DESIGNERS  
By Company Size**



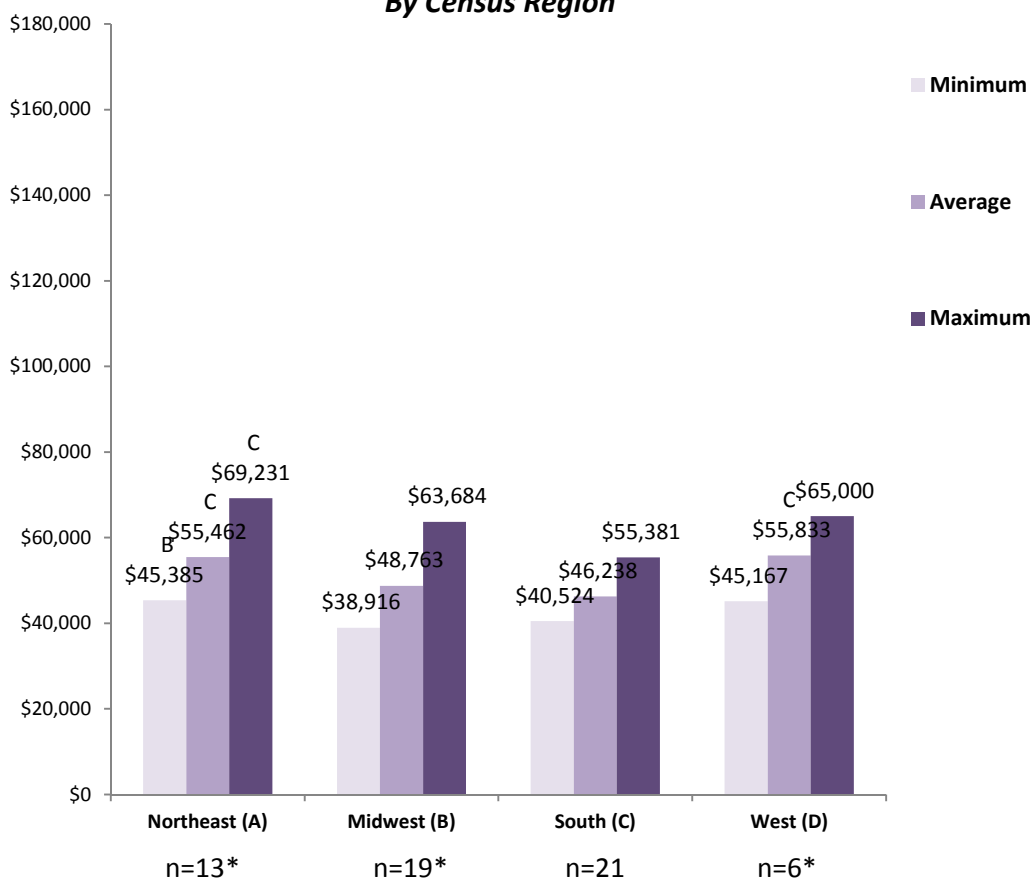
Q. For each of the positions, please indicate how each position is typically compensated (hourly wages versus salary), typical education needed for that position, and if that position typically offers retirement and health insurance.

\*indicates sample size less than 20

# Compensation by Position: Project Managers

➤ Project manager pay tends to be lower in the Midwest and South.

**Average Yearly Salary for PROJECT MANAGERS  
By Census Region**



**Average Hourly Wage for PROJECT MANAGERS  
By Census Region**



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.

\*indicates sample size less than 20



# Compensation by Position: Arborists

➤ There are few differences in arborist or other professional pay by census region.

Average Yearly Salary for ARBORISTS  
By Census Region



Average Hourly Wage for ARBORISTS  
By Census Region



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.

\*indicates sample size less than 20

# Compensation by Position: Inside Staff

➤ Inside staff pay tends to be lower in the Midwest and South.

Average Yearly Salary for INSIDE STAFF  
By Census Region



Average Hourly Wage for INSIDE STAFF  
By Census Region



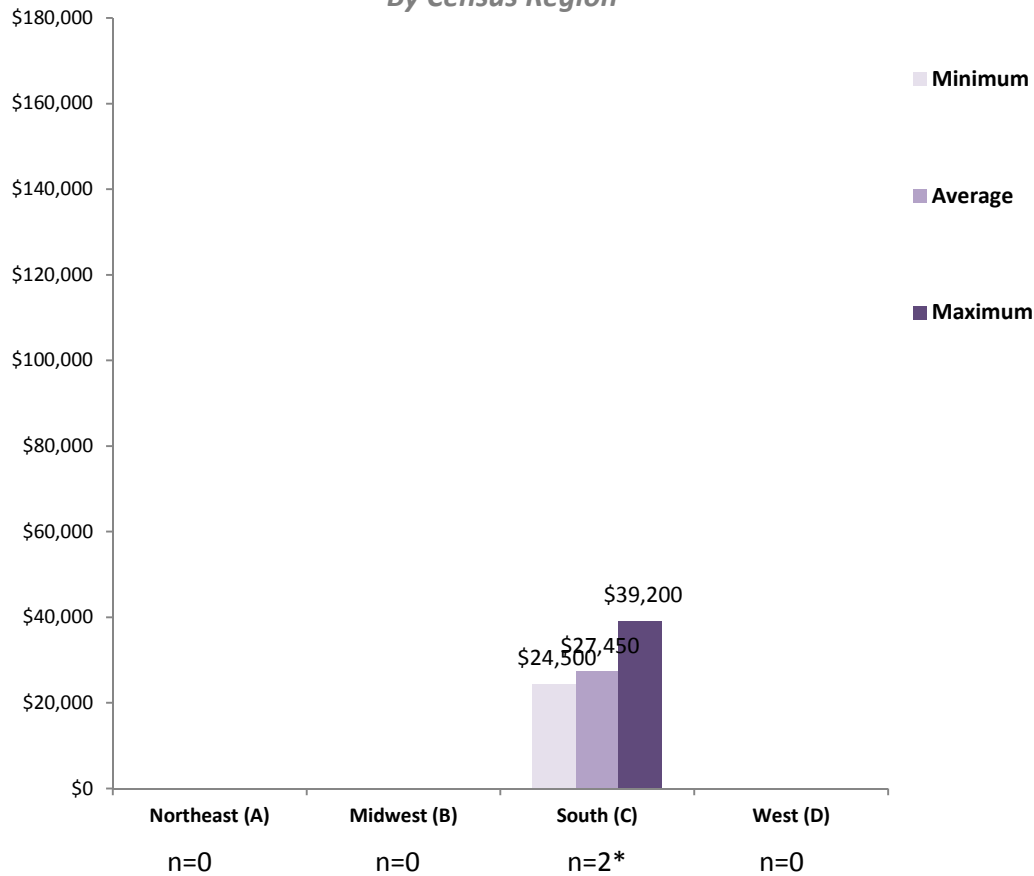
Q. For each of the positions, please indicate how each position is typically compensated (hourly wages versus salary), typical education needed for that position, and if that position typically offers retirement and health insurance.

\*indicates sample size less than 20

# Compensation by Position: Laborers

➤ Labor pay differs by region. It is lowest in the South, followed by the Midwest. The Northeast and West pay laborers the highest hourly wage.

Average Yearly Salary for LABORERS  
By Census Region



Average Hourly Wage for LABORERS  
By Census Region



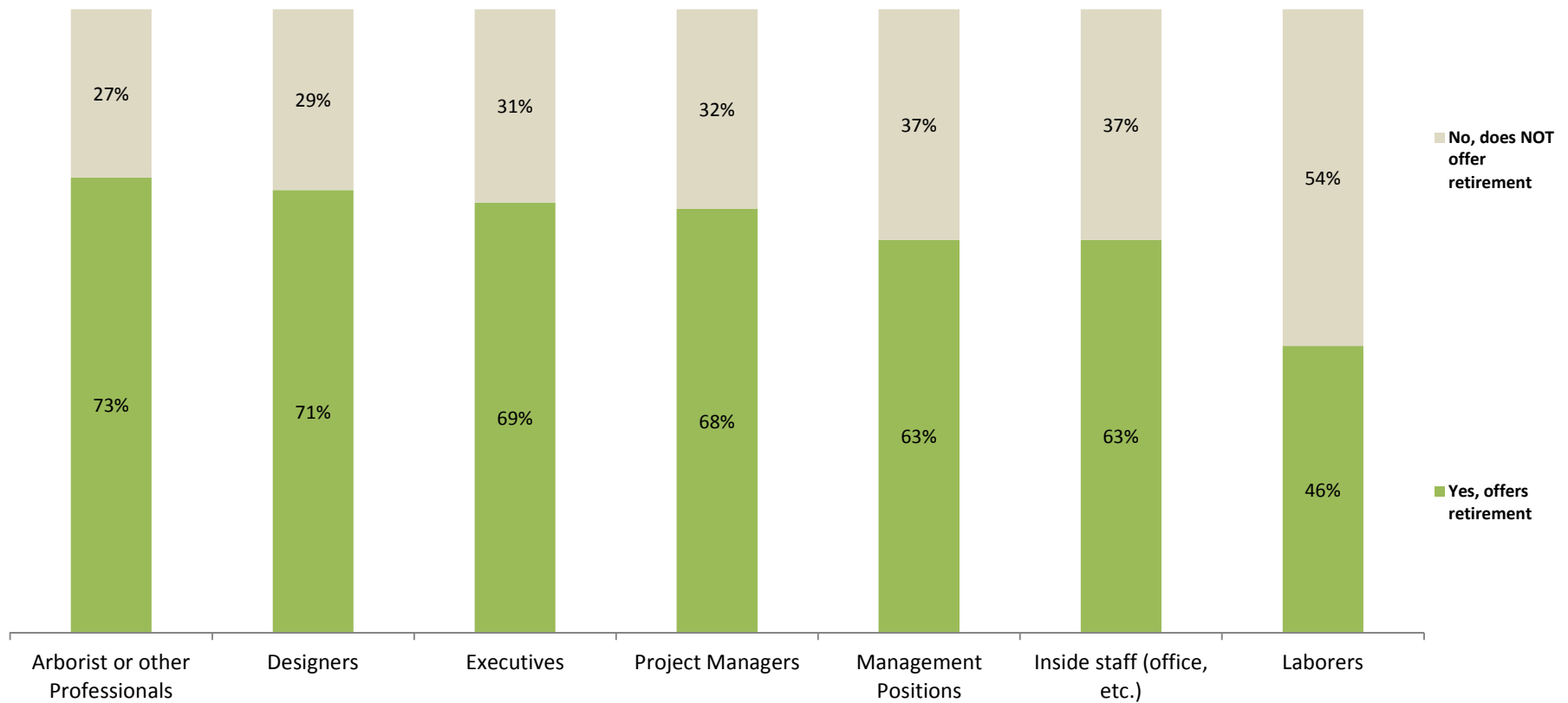
Q. For each of the positions, please indicate how each position is typically compensated (hourly wages versus salary), typical education needed for that position, and if that position typically offers retirement and health insurance.

\*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.

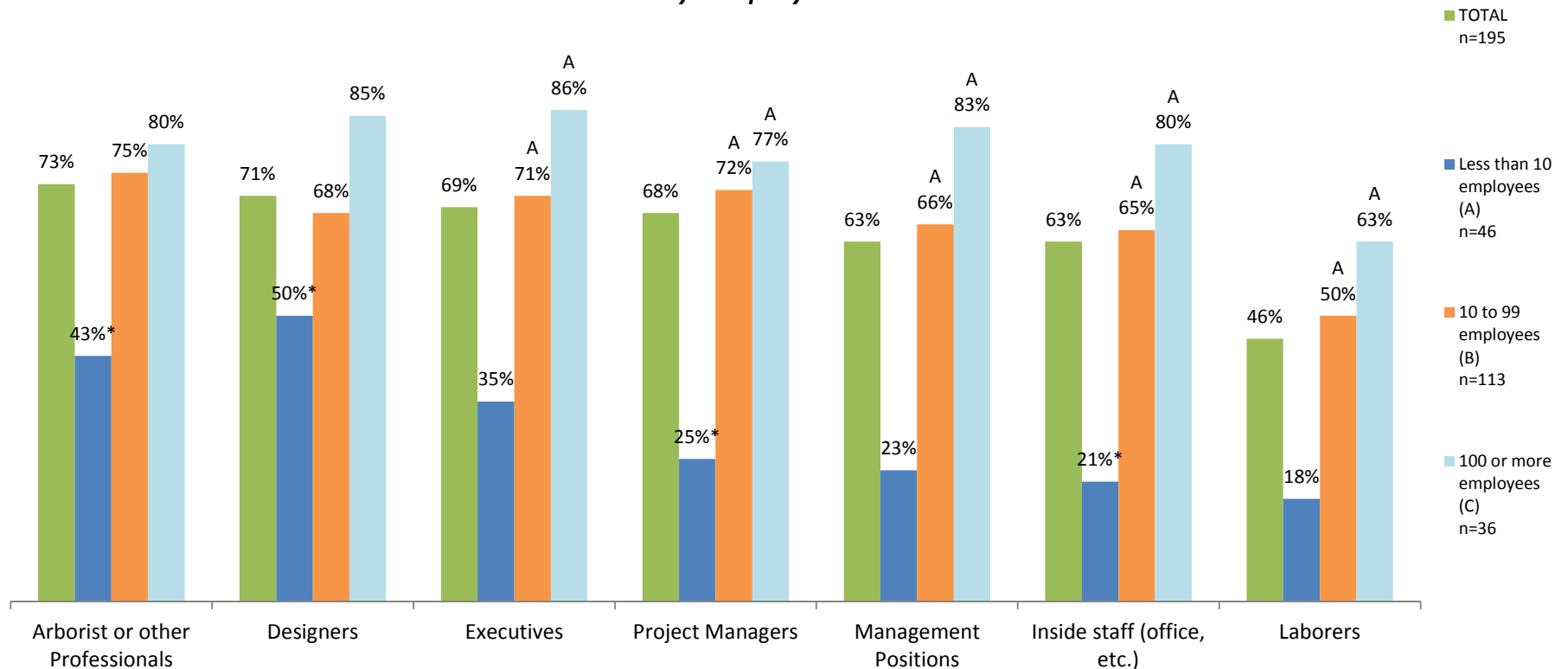
n=195

Note: Sample size varies by position

# Industry Compensation: Retirement Plans

- The largest companies are most likely to offer retirement benefits to all positions. Over half of these 100 employee or more companies offer some type of retirement plan to all positions.
- The smallest companies (less than 10 employees) often do not offer retirement benefits.

**% Offers a Retirement Plan (401K, Pension or Other)  
By Company Size**

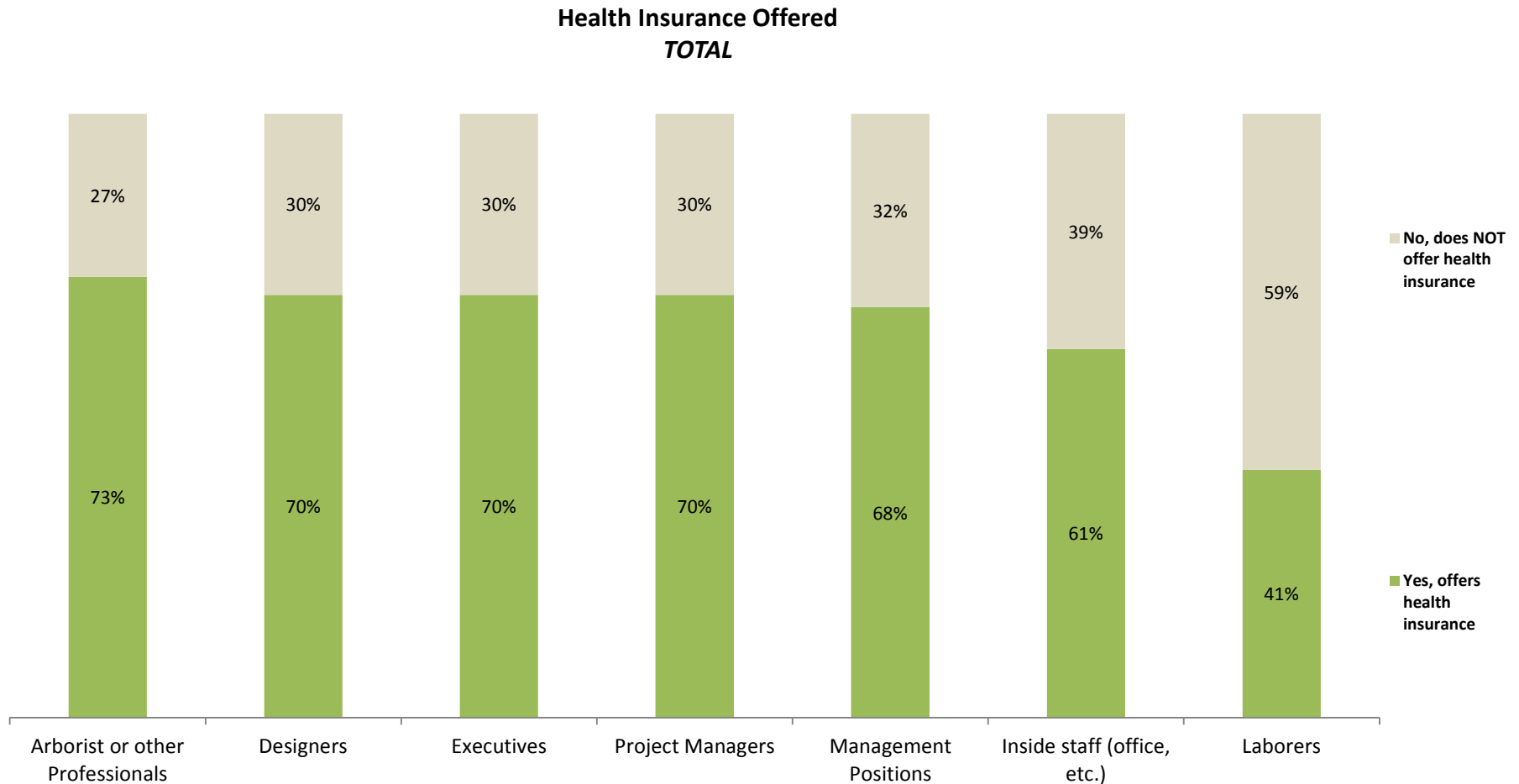


Q. For each of the positions, please indicate how each position is typically compensated (hourly wages versus salary), typical education needed for that position, and if that position typically offers retirement and health insurance.

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

# Industry Compensation: Health Insurance

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



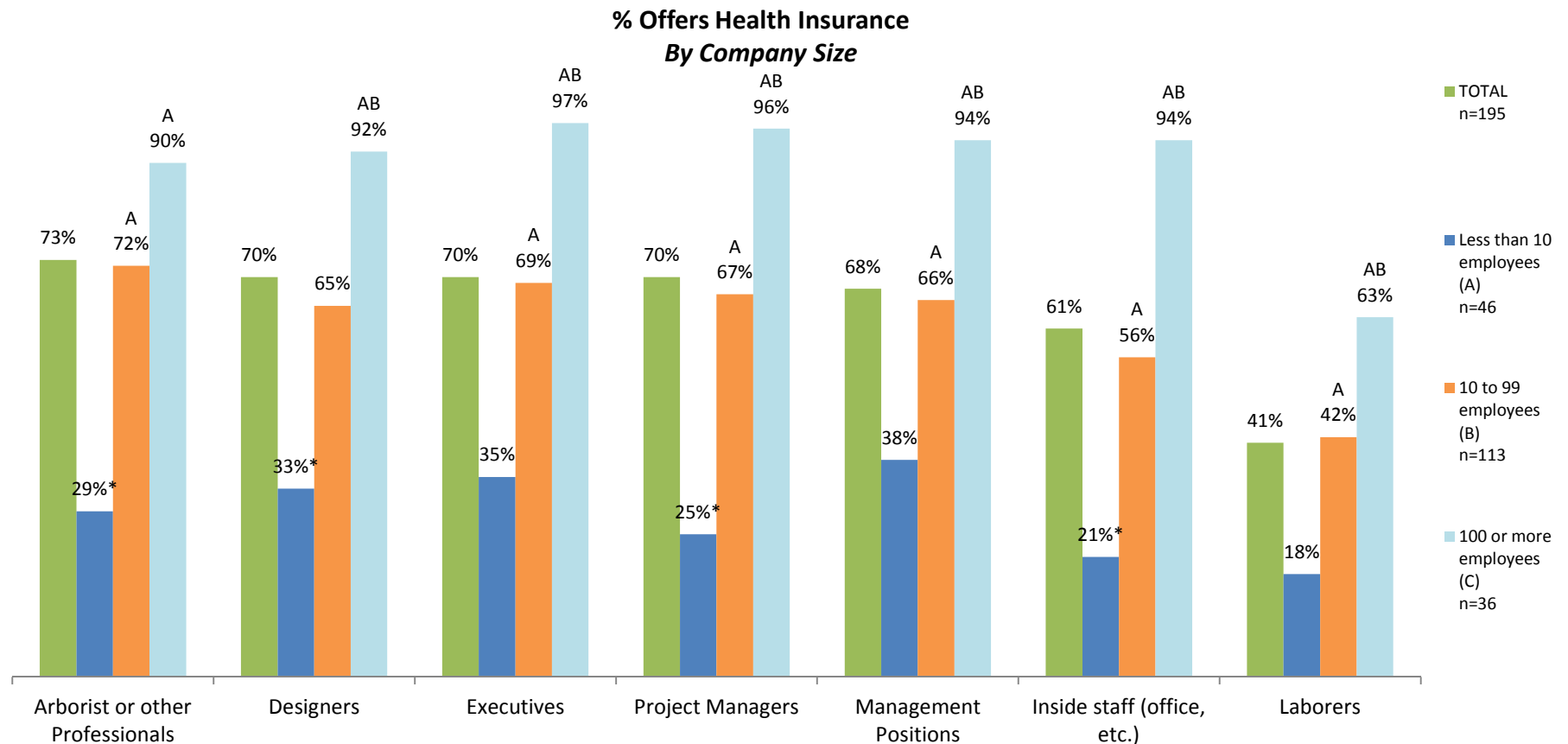
Q. For each of the positions, please indicate how each position is typically compensated (hourly wages versus salary), typical education needed for that position, and if that position typically offers retirement and health insurance.



n=195  
Note: Sample size varies by position

# Industry Compensation: Health Insurance

- Health insurance offers to all positions increases with company size. Over half of these 100 employee or more companies offer health insurance to all positions, with almost all of these 100 employee or more companies offering health insurance to every position except laborers.
- The smallest companies (less than 10 employees) most often do not offer health insurance.



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Note: Sample size varies by position  
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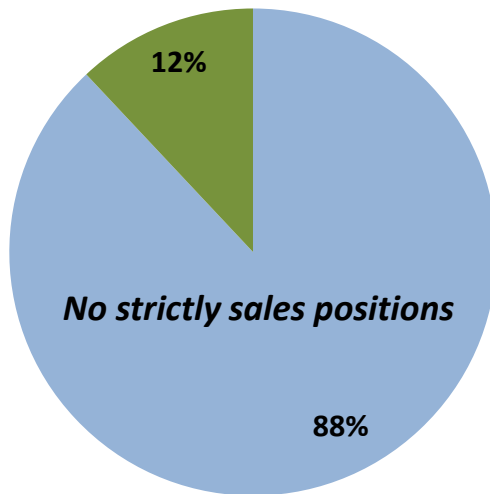
# **Employee Compensation:** ***Sales Positions***



# Sales: Dedicated Sales Positions

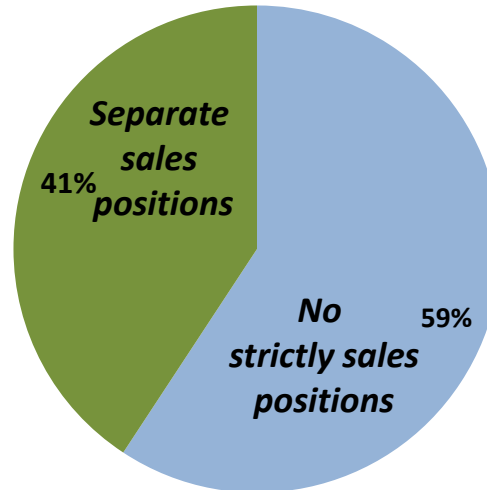
➤ All of the largest companies interviewed have separate sales positions. The medium sized companies are mixed – a little under half have separate sales positions. The smallest companies generally do not have separate sales positions.

Sales Positions  
Less than 10 Employees



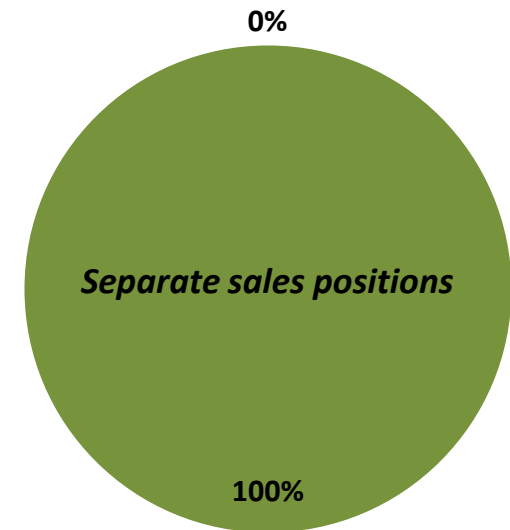
n=8

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?

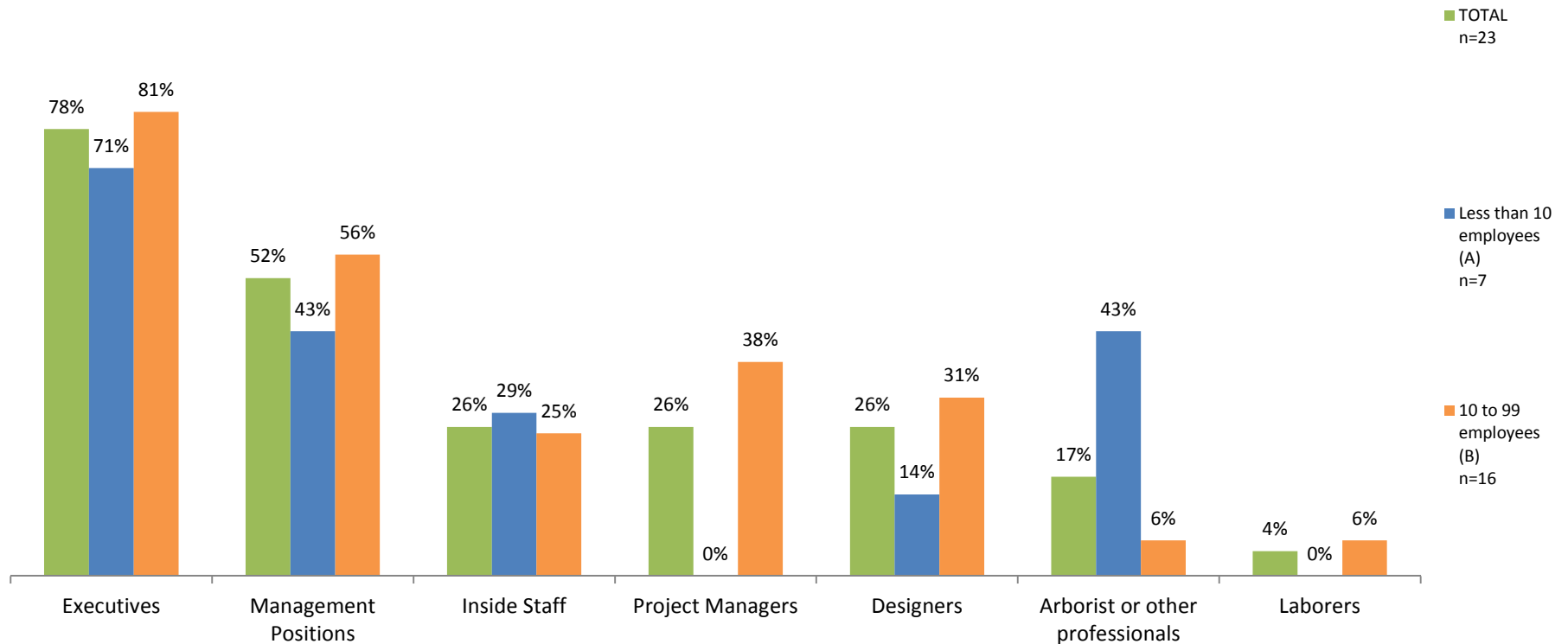


Note: Small sample sizes

# 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

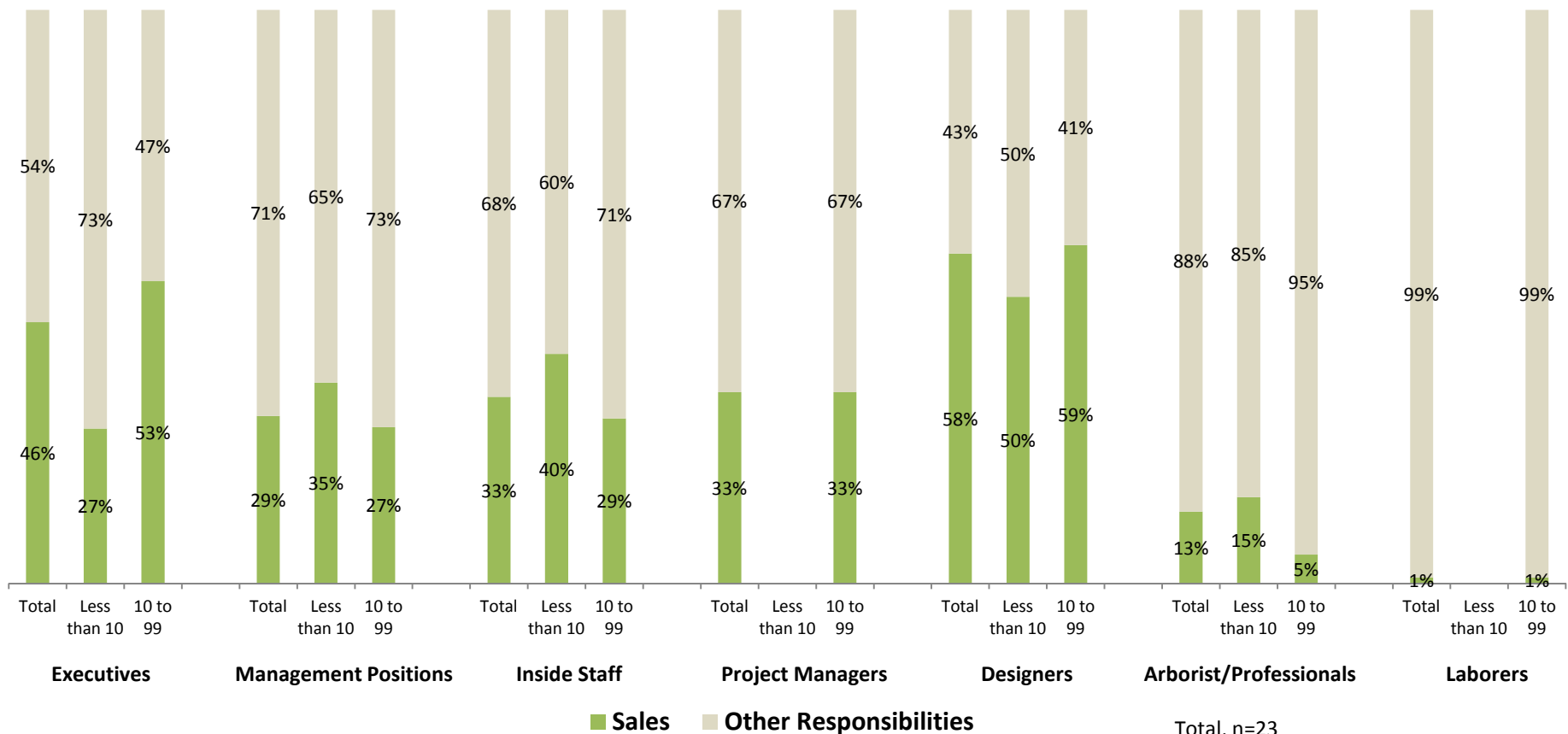


Q. Which of the following positions at your company handles sales/quotes? [If company does not have separate sales positions]

# 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**



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]



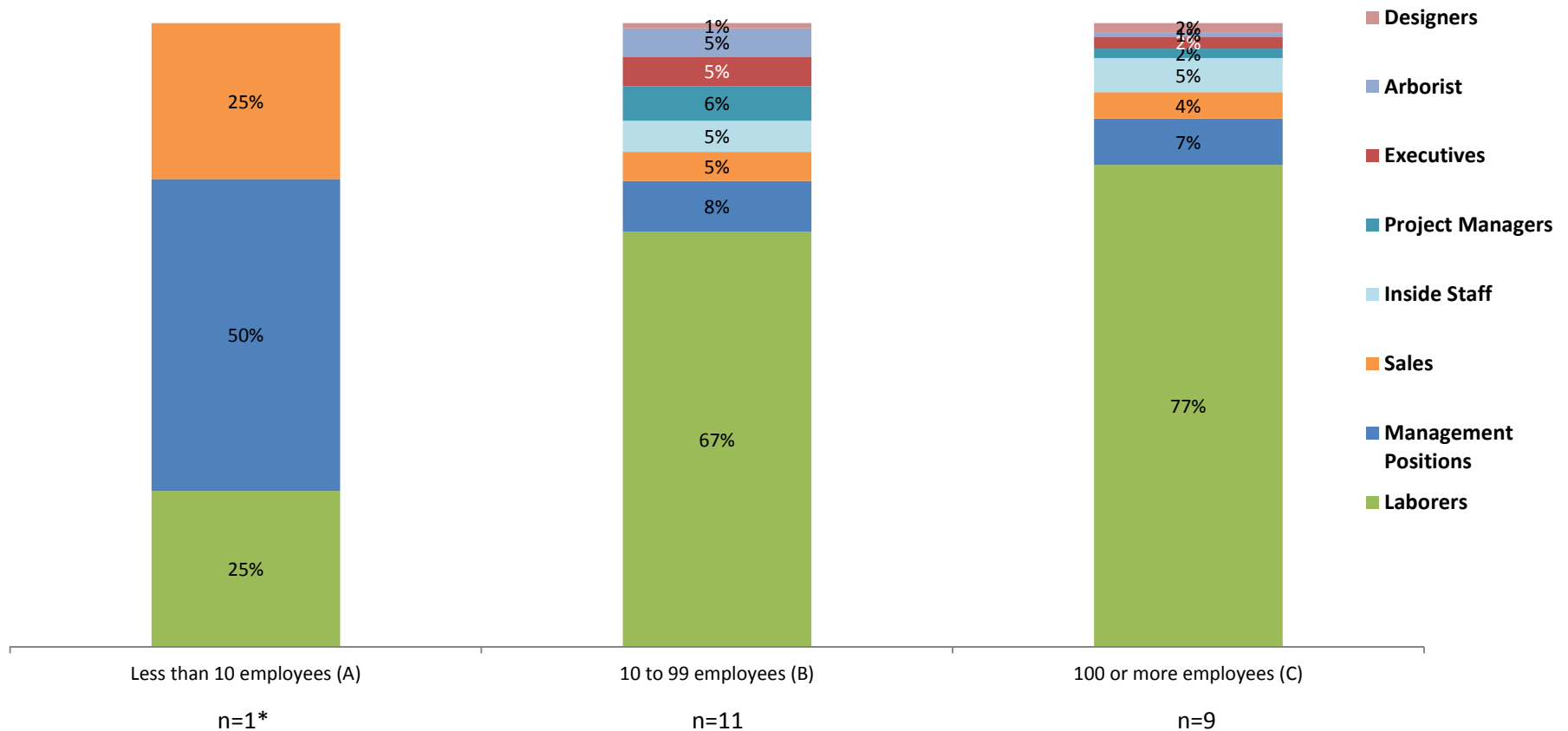
Total, n=23  
Less than 10 employees, n = 7  
10 to 99 employees, n = 16

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.

Average Position Mix  
By Company Size



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

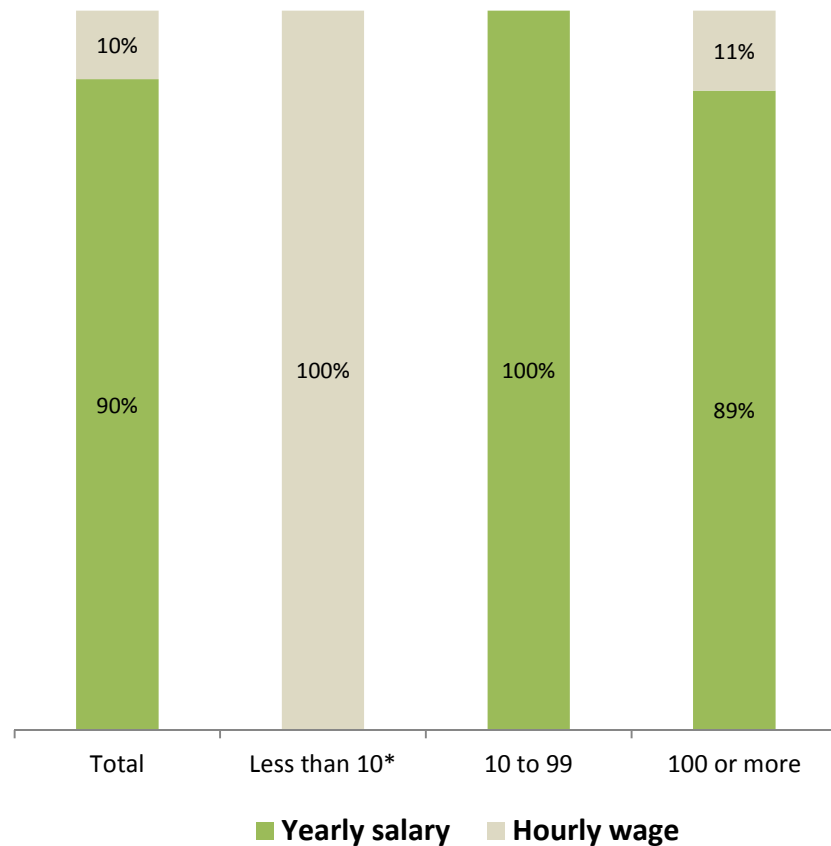


Note: Small sample sizes

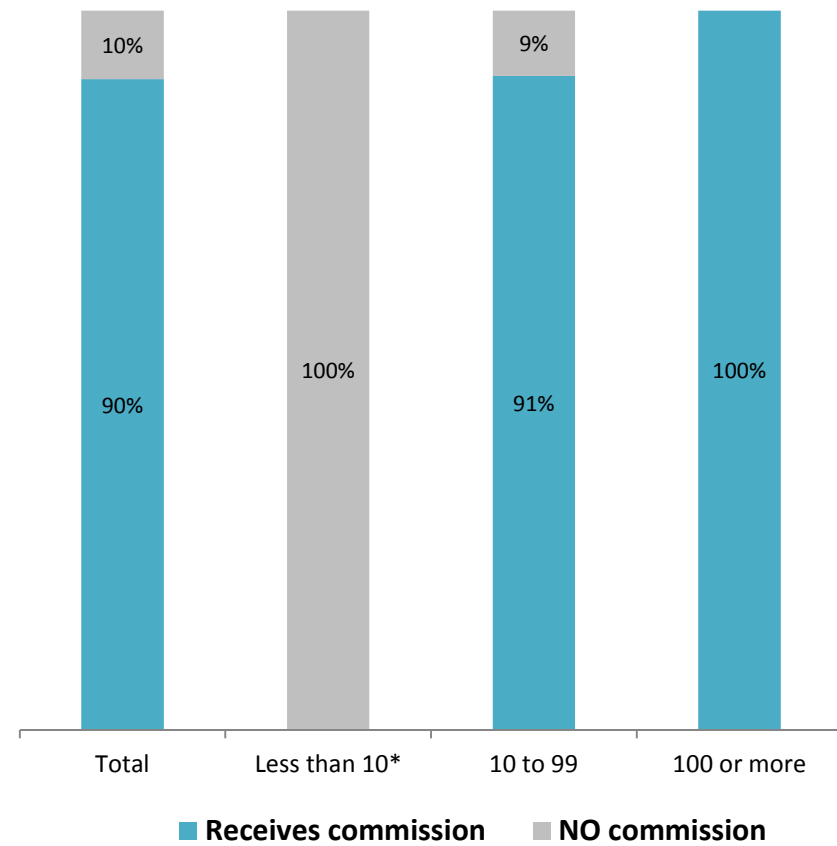
# Sales: Compensation Type

➤ Most sales positions are compensated with both a yearly salary and commission.

Type of Compensation: Salary vs. Hourly Wage



Type of Compensation: Commission



Q. For sales positions, please indicate how that position is typically compensated (hourly wages versus salary), if commission is received based on job amounts bid, typical education needed for that position, and if that position typically offers retirement and health insurance. [If company has separate sales positions]

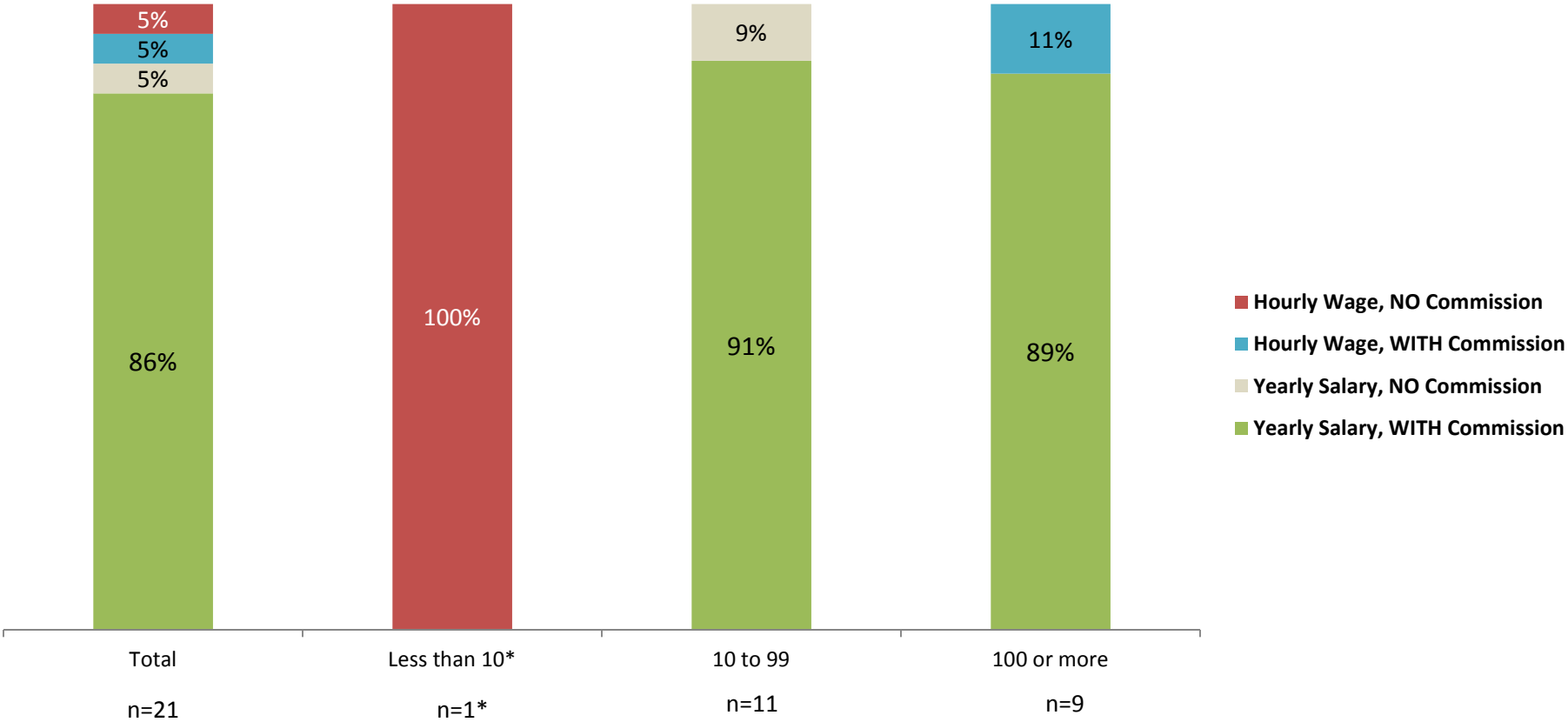


Total, n=21  
 \*Less than 10 employees, n = 1  
 10 to 99 employees, n = 11  
 100 or more employees, n = 9  
 Note: Small sample sizes

# Sales: Compensation Type

➤ Most sales positions receive a yearly salary with commission.

Type of Compensation: Total Salary/Commission Package



Q. For sales positions, please indicate how that position is typically compensated (hourly wages versus salary), if commission is received based on job amounts bid, typical education needed for that position, and if that position typically offers retirement and health insurance. [If company has separate sales positions]

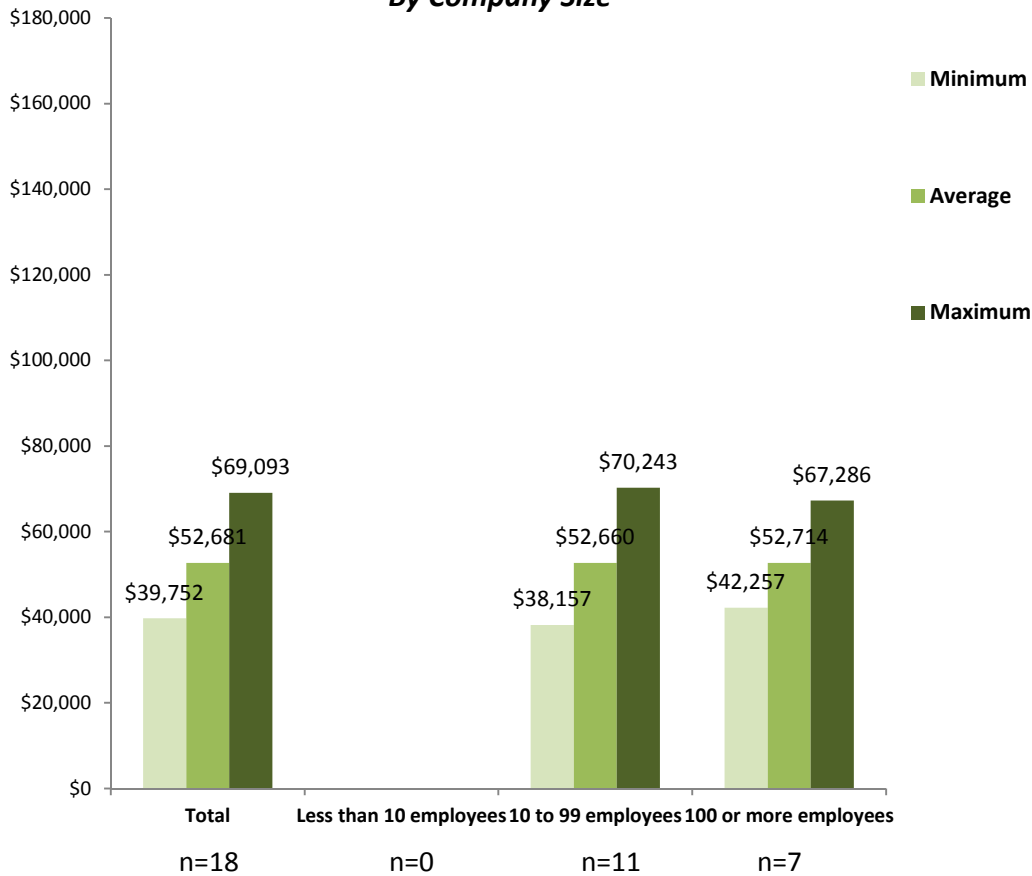


Note: Small sample sizes

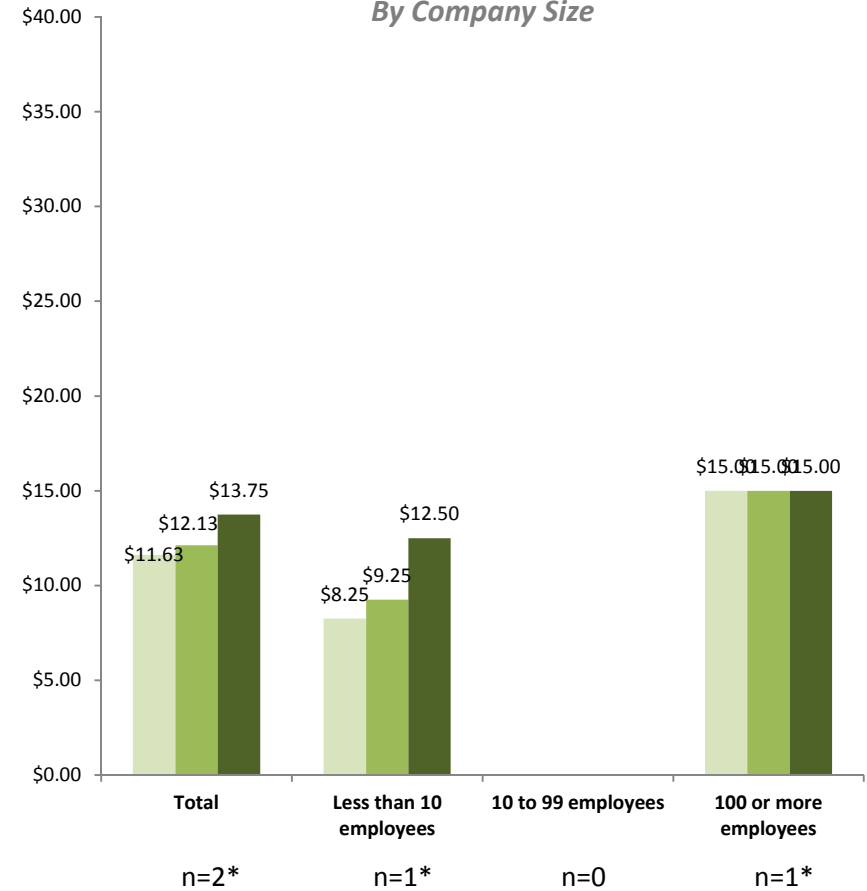
# Sales: Compensation

➤ Sales position salary averages slightly over \$50,000 a year, with little directional difference between medium and large companies.

**Average Yearly Salary for SALES POSITIONS  
By Company Size**



**Average Hourly Wage for SALES POSITIONS  
By Company Size**



Q. What is the yearly salary range for sales positions?/What is the hourly wage range for sales positions? [If company has separate sales positions]

# Sales: Compensation

➤ Average sales position commission rate is 6.1%.



Q. What is the commission rate range for sales positions? [If company has separate sales positions]



Note: Small sample sizes



# Sales: Retirement & Health Insurance

➤ Most sales positions are offered a retirement plan and health insurance.



Q. For sales positions, please indicate how that position is typically compensated (hourly wages versus salary), if commission is received based on job amounts bid, typical education needed for that position, and if that position typically offers retirement and health insurance. [If company has separate sales positions]

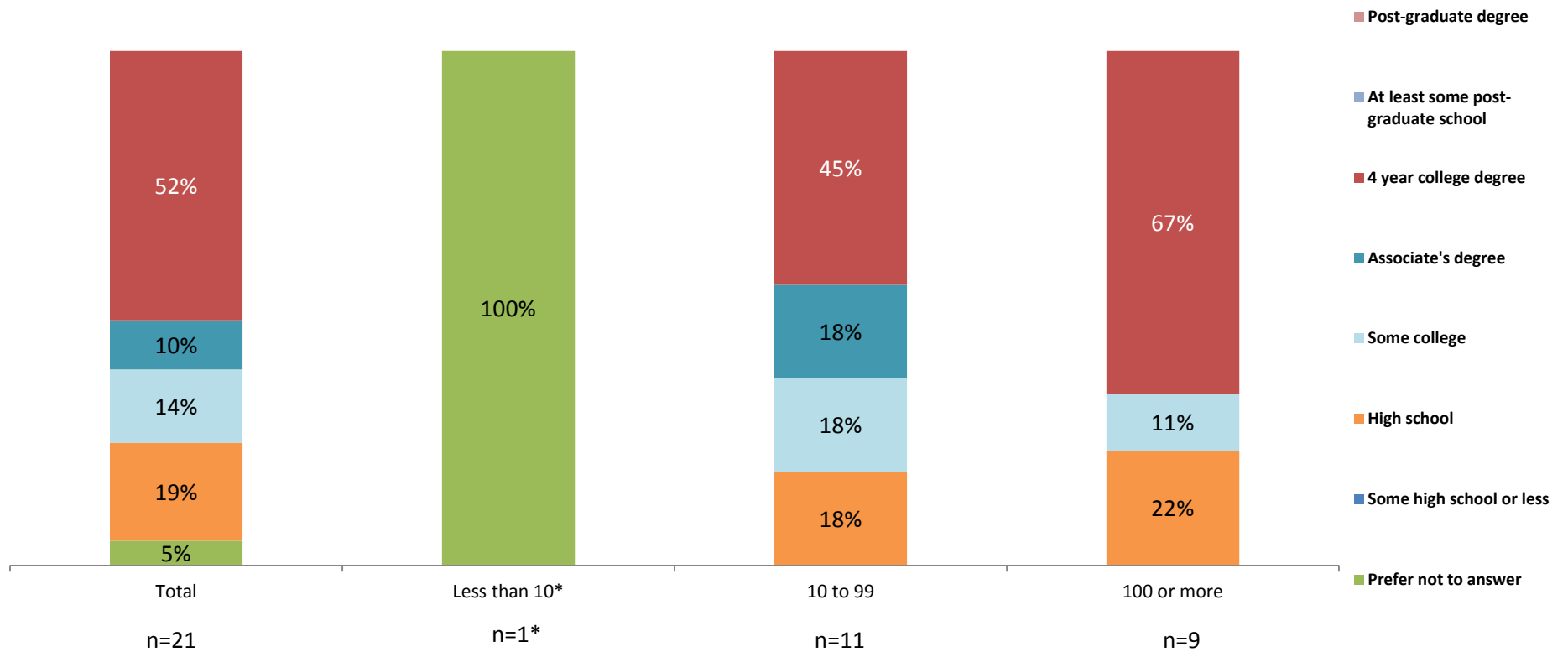


Total, n=21  
 \*Less than 10 employees, n = 1  
 10 to 99 employees, n = 11  
 100 or more employees, n = 9  
 Note: Small sample sizes

# Sales: Typical Education

➤ About half of the companies indicated that sales positions typically require a 4-year college degree.

Typical Educational Qualifications



Q. For sales positions, please indicate how that position is typically compensated (hourly wages versus salary), if commission is received based on job amounts bid, typical education needed for that position, and if that position typically offers retirement and health insurance. [If company has separate sales positions]



Note: Small sample sizes

# Employee Education

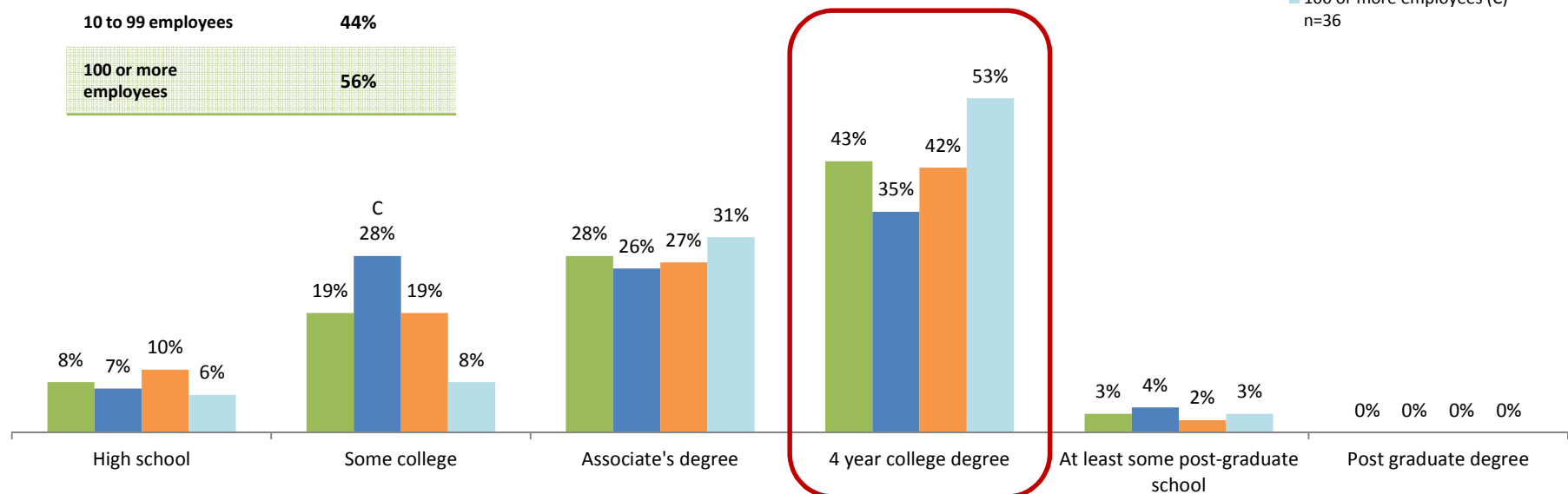
# Management/Executive: Minimum Education

➤ Most recommend more than a high school degree to obtain a management or executive level position in the industry, with a 4 year college degree the most frequent recommendation. The largest companies are directionally more likely to recommend a college degree.

Minimum Education for Management/Executive Positions  
By Company Size

NET College Degree, Some Post-Graduate School, or Post-Graduate Degree	
Less than 10 employees	39%
10 to 99 employees	44%
100 or more employees	56%

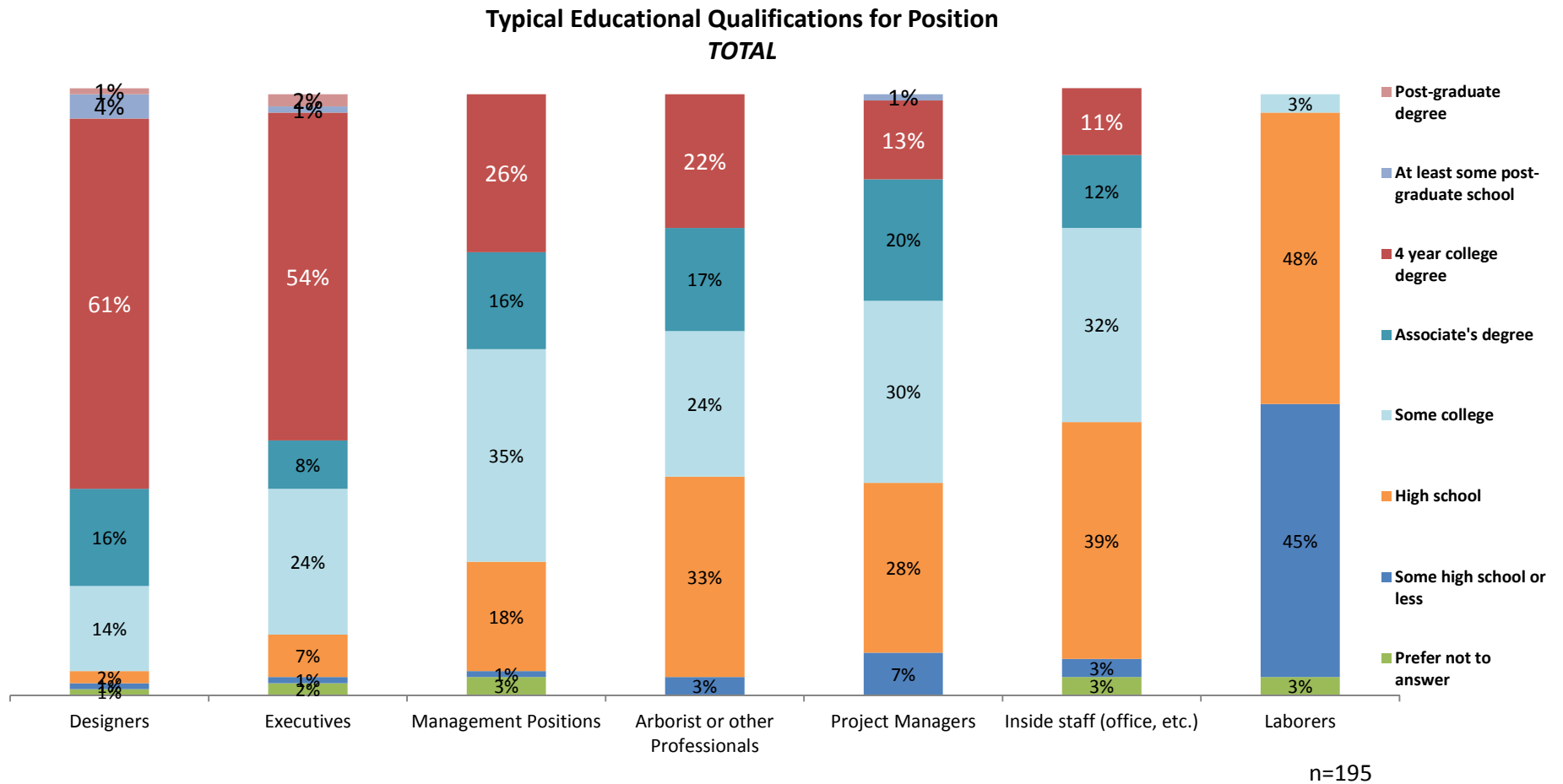
- TOTAL  
n=195
- Less than 10 employees (A)  
n=46
- 10 to 99 employees (B)  
n=113
- 100 or more employees (C)  
n=36



Q. Which of the following is the minimum amount of education you recommend for a management or executive level position?

# Typical Education by Position

➤ Half or more companies say that a 4 year college degree is typically needed for designers and executives. Management positions typically require at least some college or more education.



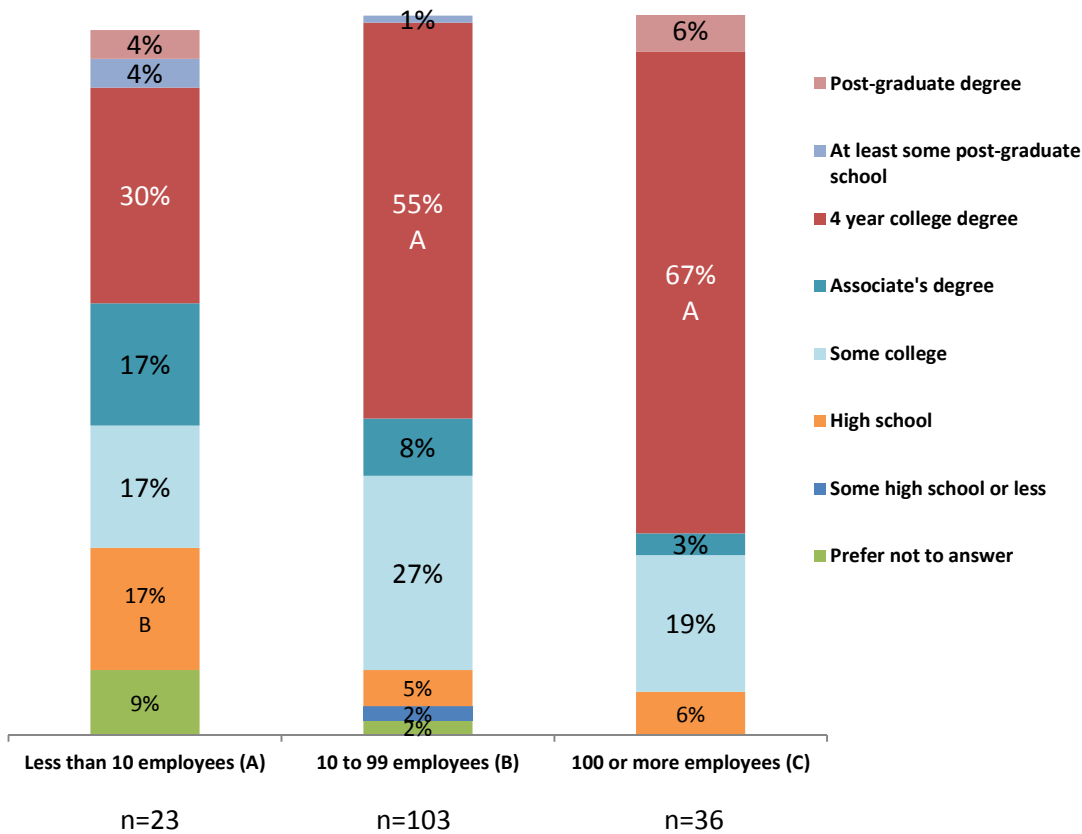
Q. For each of the positions, please indicate how each position is typically compensated (hourly wages versus salary), typical education needed for that position, and if that position typically offers retirement and health insurance.

Note: Sample size varies by position

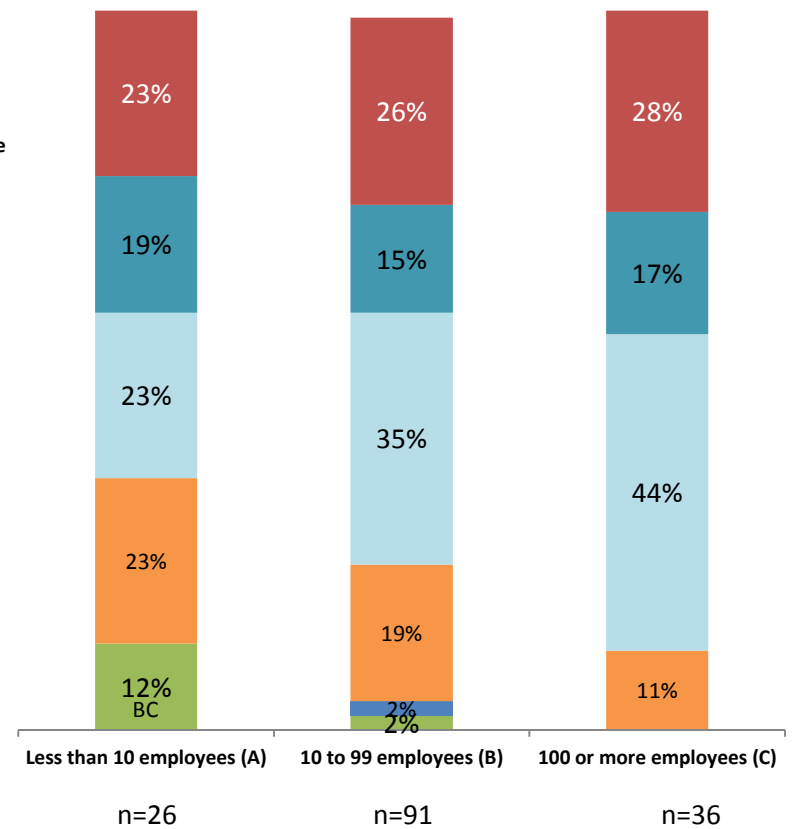
# Education by Position

➤ 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

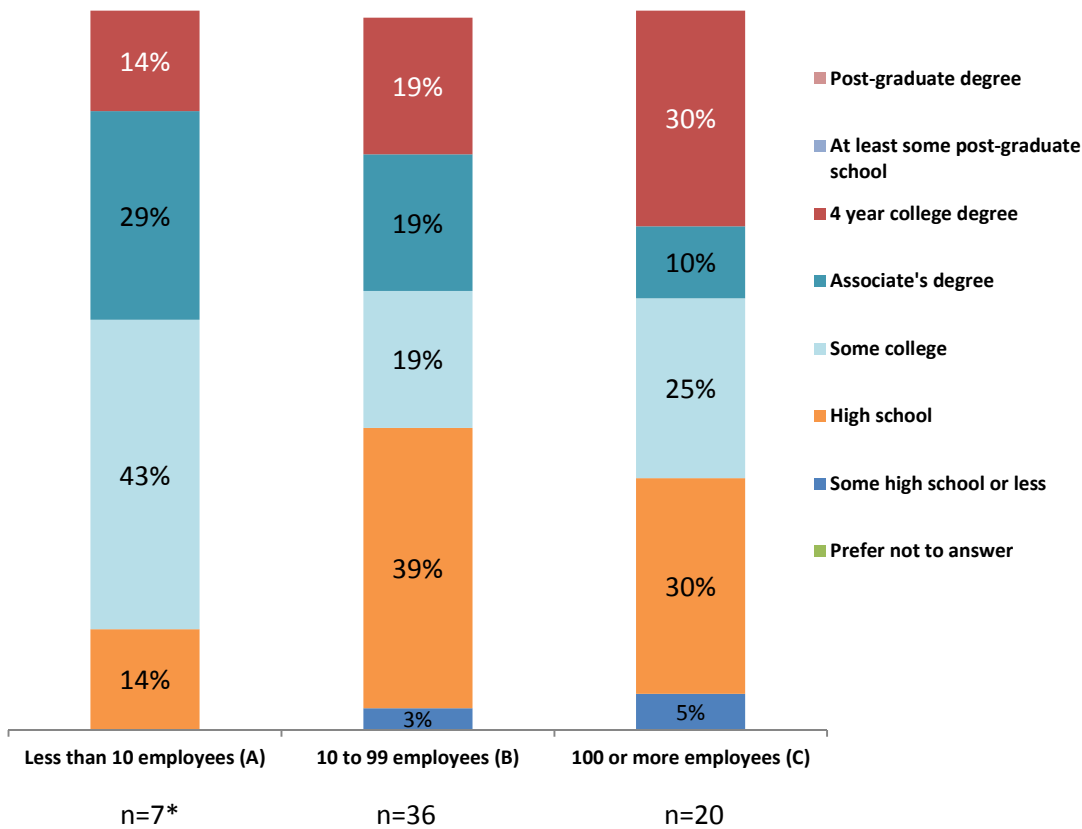


Q. For each of the positions, please indicate how each position is typically compensated (hourly wages versus salary), typical education needed for that position, and if that position typically offers retirement and health insurance.

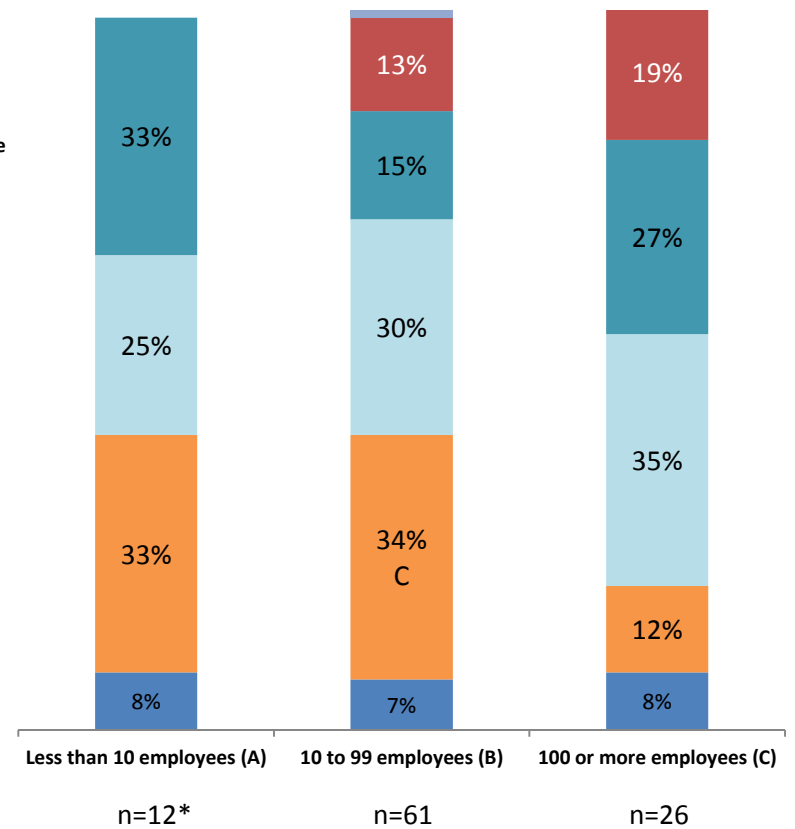
# Education by Position

➤ Typical educational requirements for arborists and project managers vary widely. Acceptable levels range from high school degree to college degree, including some college and associate's degree.

Typical Educational Qualifications for ARBORISTS  
By Company Size



Typical Educational Qualifications for PROJECT MANAGERS  
By Company Size



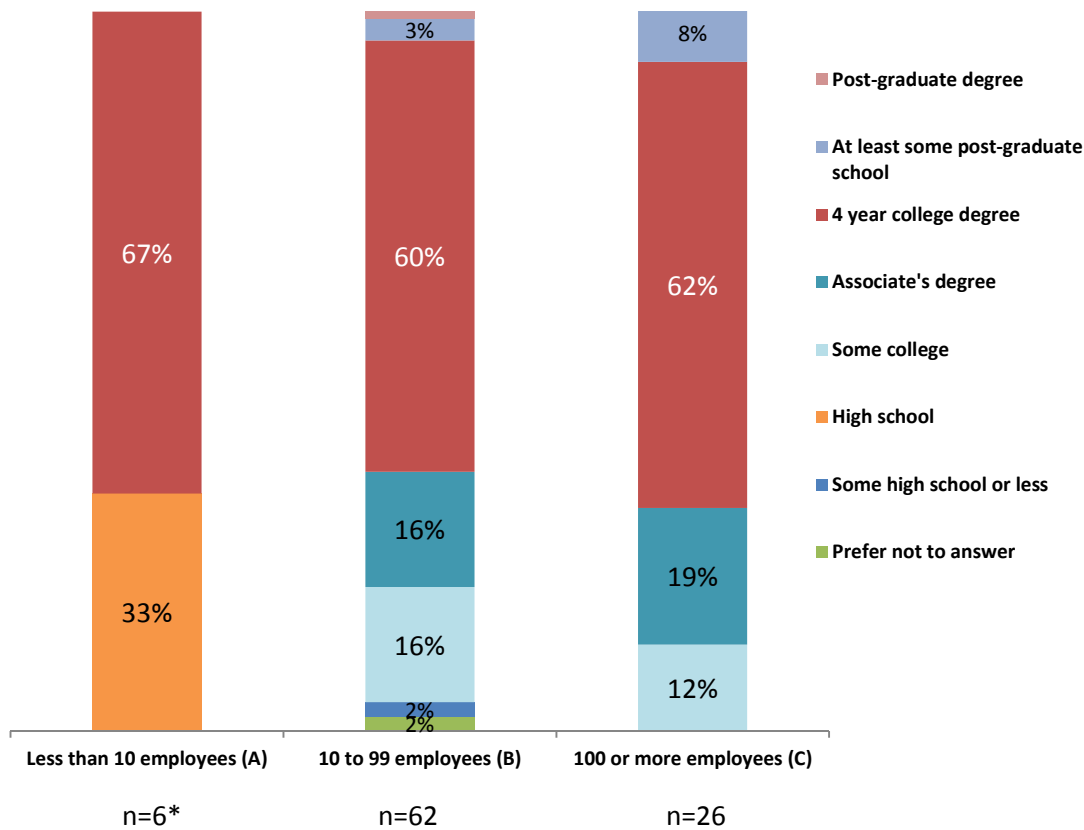
Q. For each of the positions, please indicate how each position is typically compensated (hourly wages versus salary), typical education needed for that position, and if that position typically offers retirement and health insurance.

\*indicates sample size less than 20

# Education by Position

➤ The majority of all companies indicate that typically, a college degree is required for a designer.

Typical Educational Qualifications for DESIGNERS  
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.

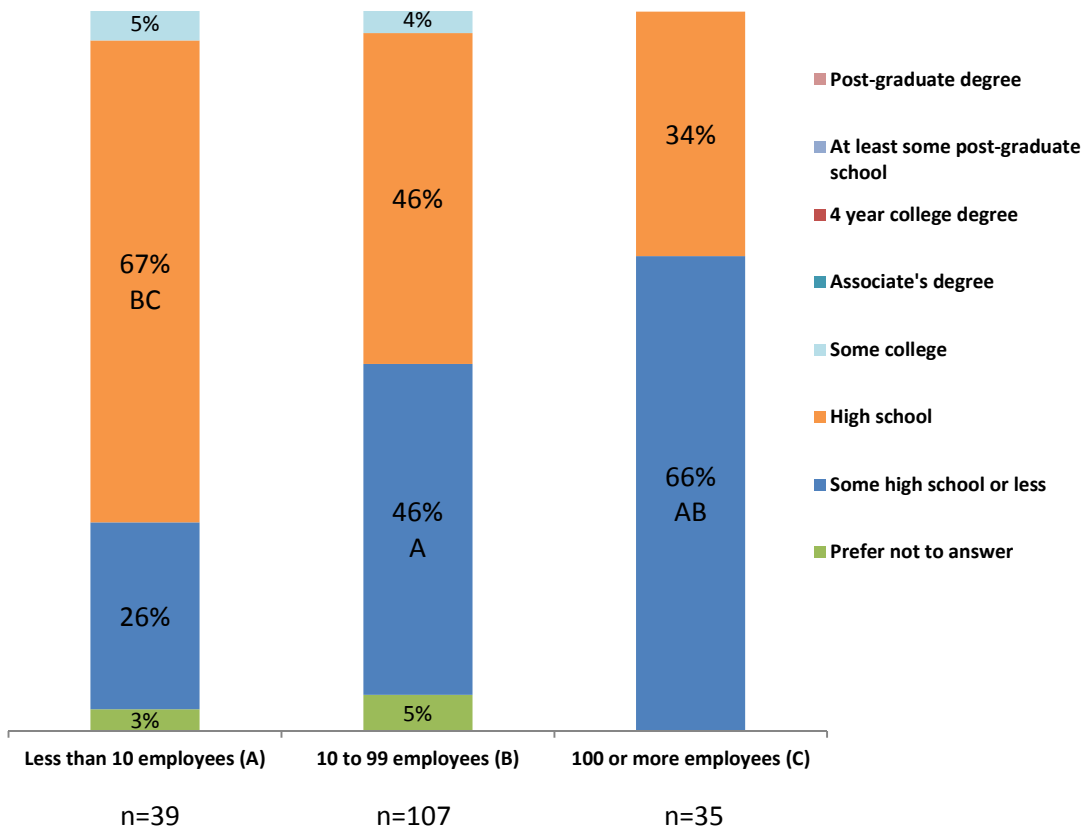
\*indicates sample size less than 20



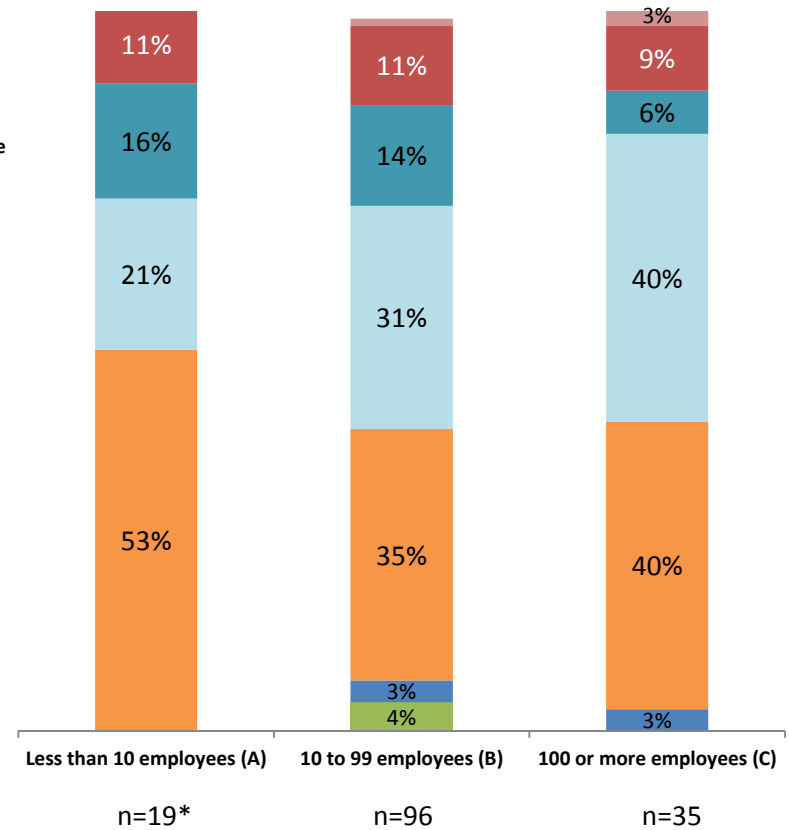
# Education by Position

➤ High school or less is typically all that is required for a laborer, with the smallest companies most likely to require a high school degree. Inside staff typically have a high school degree or some college.

Typical Educational Qualifications for LABORERS  
By Company Size



Typical Educational Qualifications for INSIDE STAFF  
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.

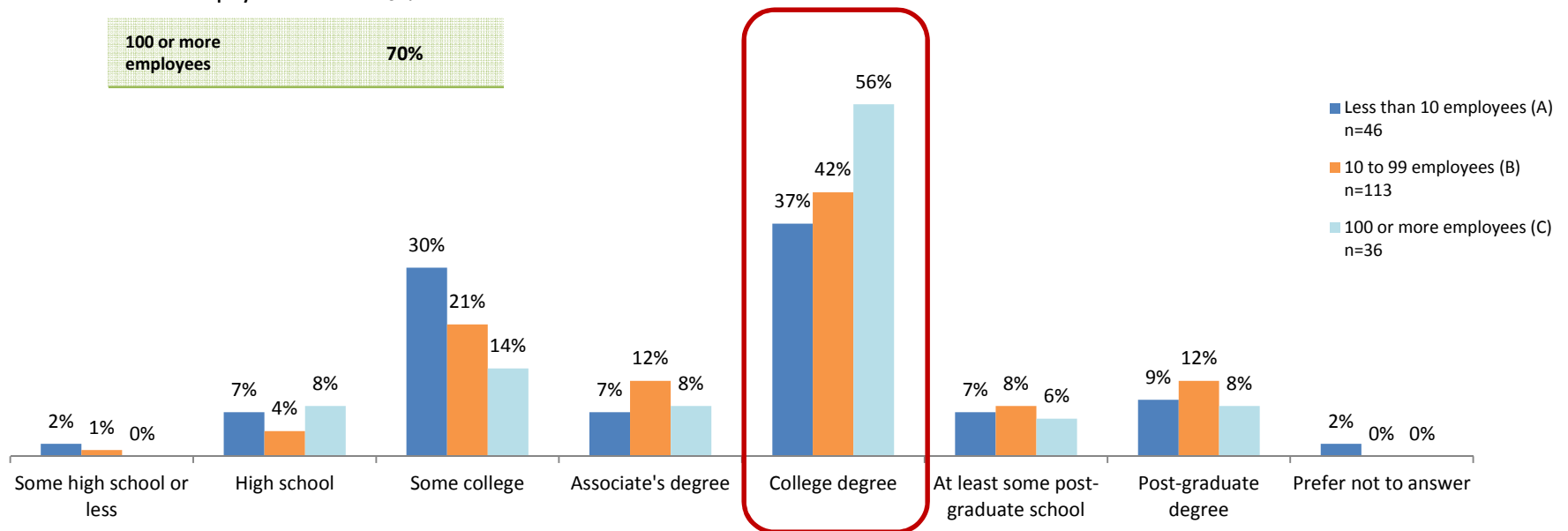
\*indicates sample size less than 20

# Respondent Education

➤ Most frequently, those with the ability to respond to the survey have a college degree. Over half have at least a college degree.

Education  
By Company Size

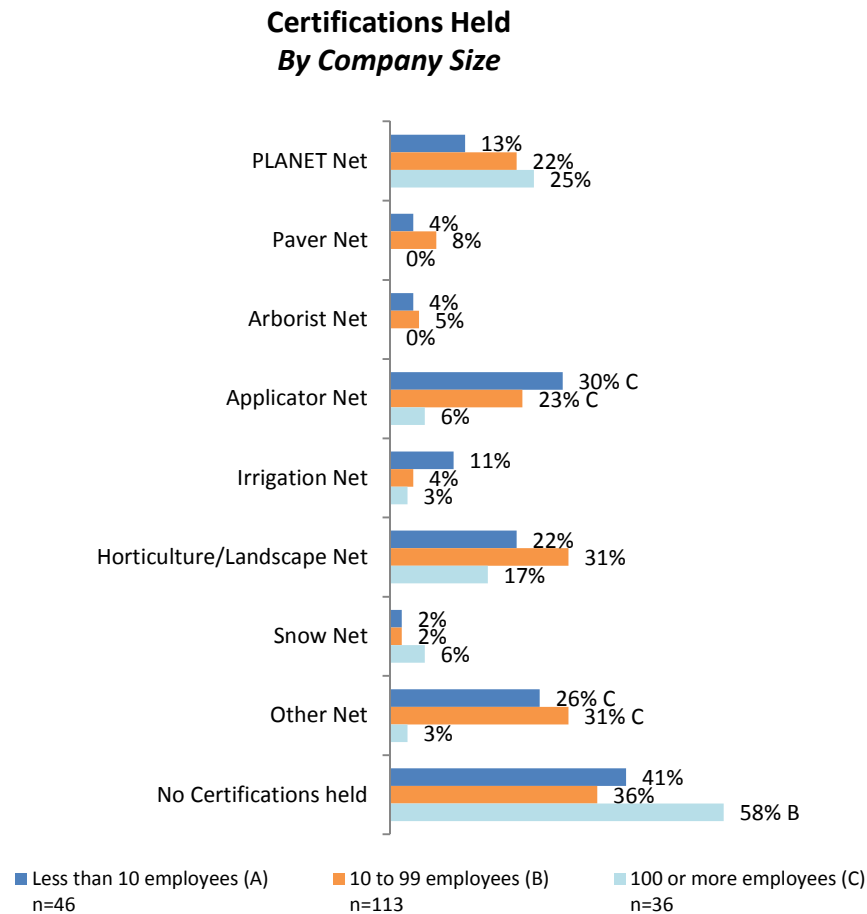
NET College Degree, Some Post-Graduate School, or Post-Graduate Degree	
Less than 10 employees	53%
10 to 99 employees	62%
100 or more employees	70%



Q. What is the highest level of education you have completed or the highest degree you have received?

# Respondent Certifications

➤ About 6 in 10 of those in the smallest and medium sized companies have some type of professional landscape certification, while 4 in 10 of those in the largest sized companies do so. This lower rate of professional certificates in the larger companies is likely due to the higher mix of HR positions responding to the survey.



# Respondent Certifications

➤ Horticulture/Landscape, PLANET, and Applicator certificates are most held certifications by respondents interviewed.

DETAILED - Landscape Industry Certifications Held		Total
	Base	n=195
<b>Horticulture/Landscape (Net)</b>		<b>26%</b>
	Horticulture- license, certification, registered	7%
	Landscape contractor - license, certification, registered	6%
	Landscape Architecture - license, certification, registered	5%
	Other landscaping related licenses or certifications	4%
	Nursery - certified	3%
	Turf and/or ornamental - license or certification	3%
<b>PLANET (Net)</b>		<b>21%</b>
	PLANET Landscape Industry Certified Manager (CLP or CCLP)	14%
	PLANET Landscape Industry Certified Technician (Interior or Exterior) (CLT, CLT-E, CLT-I)	5%
	Other/Unspecified PLANET certification	3%
<b>Applicator (Net)</b>		<b>22%</b>
	Other or Non-Specific Pesticide or Applicator License or Certification	19%
<b>Irrigation (Net)</b>		<b>6%</b>
	IA - CIC License	3%
<b>Paver (Net)</b>		<b>6%</b>
	ICPI (Interlocking Concrete Pavement Institute)	5%
	NCMA (National Concrete Masonry Association, Segmental Retaining Wall Installer)	3%
<b>Arborist (Net)</b>		<b>4%</b>
<b>Snow (Net)</b>		<b>3%</b>
<b>Other (Net)</b>		<b>25%</b>
	State-issued license	15%
	Other	7%
	Other "Green" , general conservation, water conservation	4%
	Manufacturer - authorized or trained	3%
	General Contracting or Home Improvement License	3%
<b>No Certifications Held</b>		<b>42%</b>

Note: Responses 3% or higher are shown

Q. What landscape professional certifications do you have?

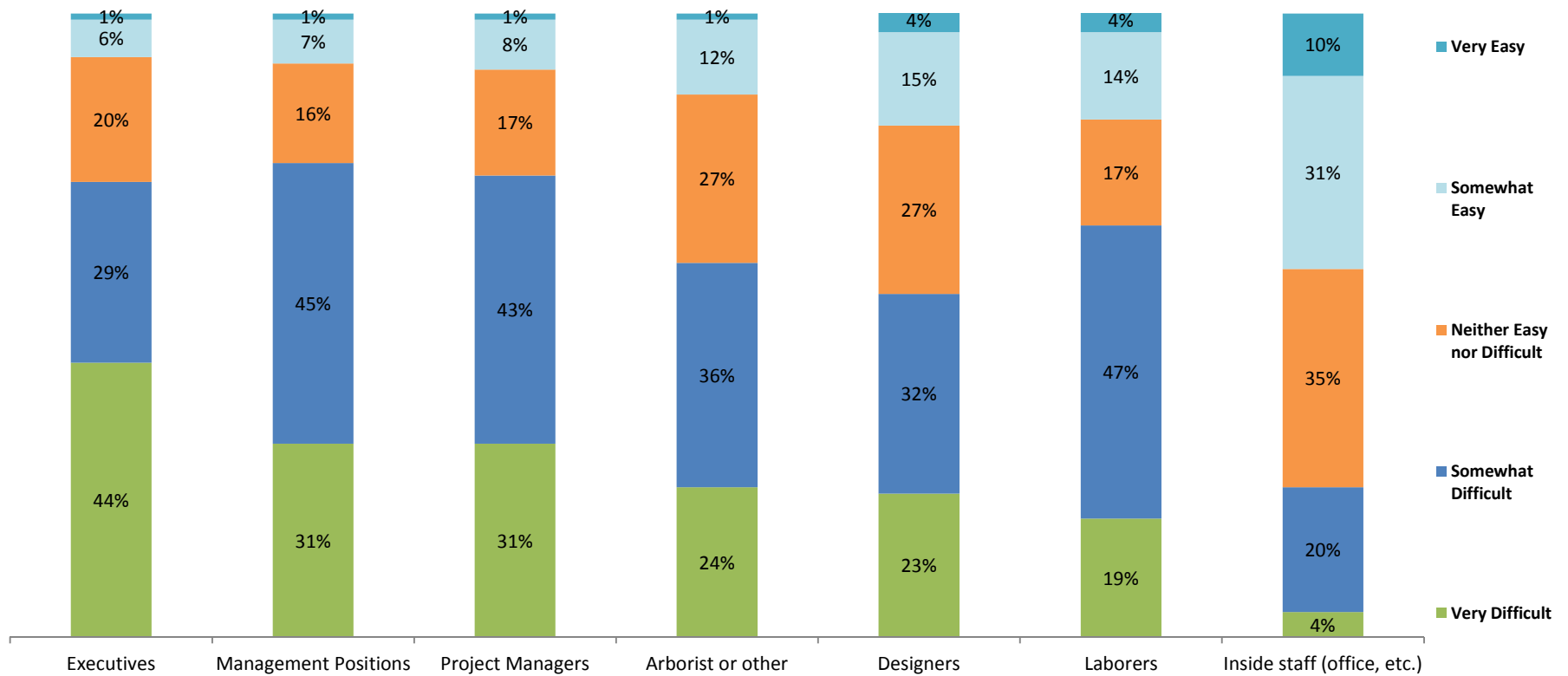


# Prospective Employment

# Qualified Employee Attitudes

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

Ease of Finding Qualified Employees  
**TOTAL**

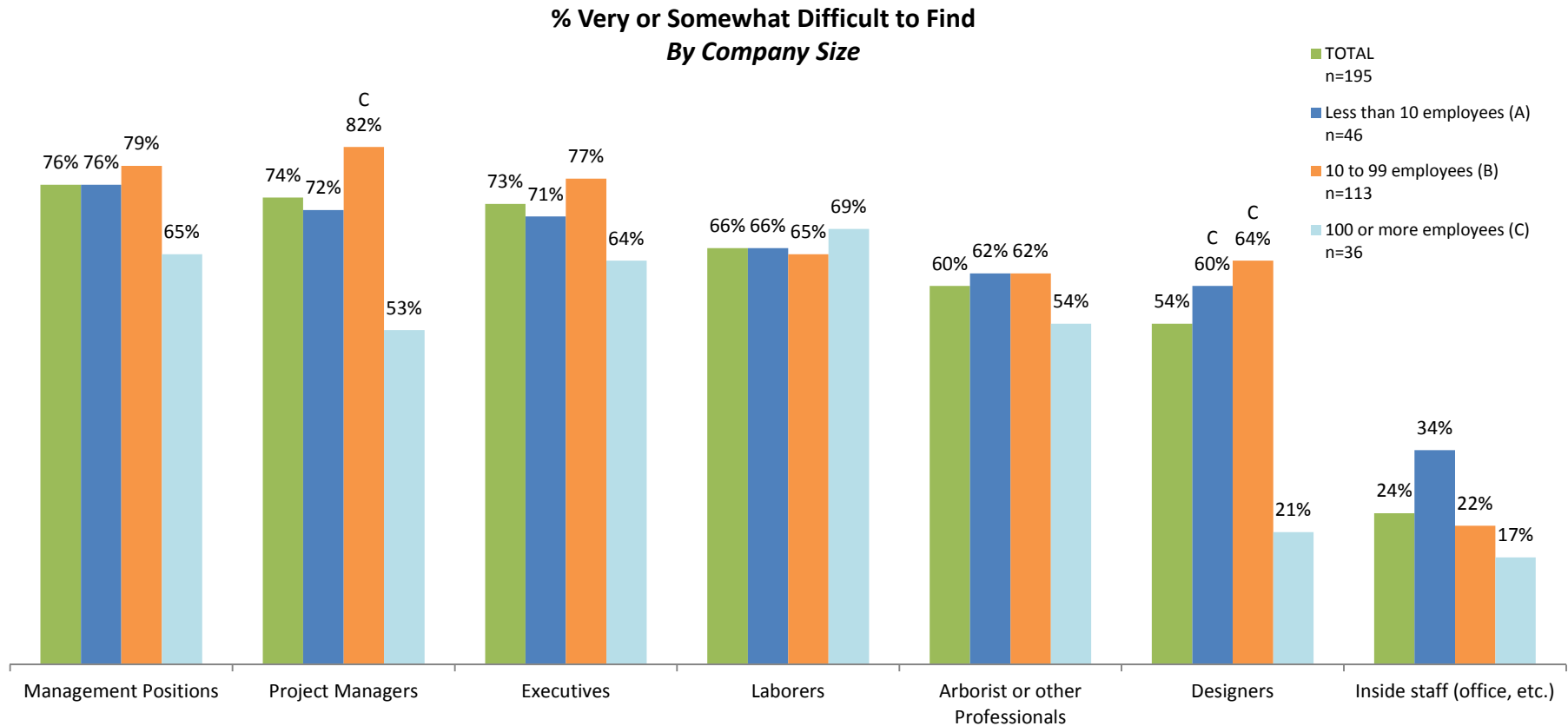


n=195

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

# 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.



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

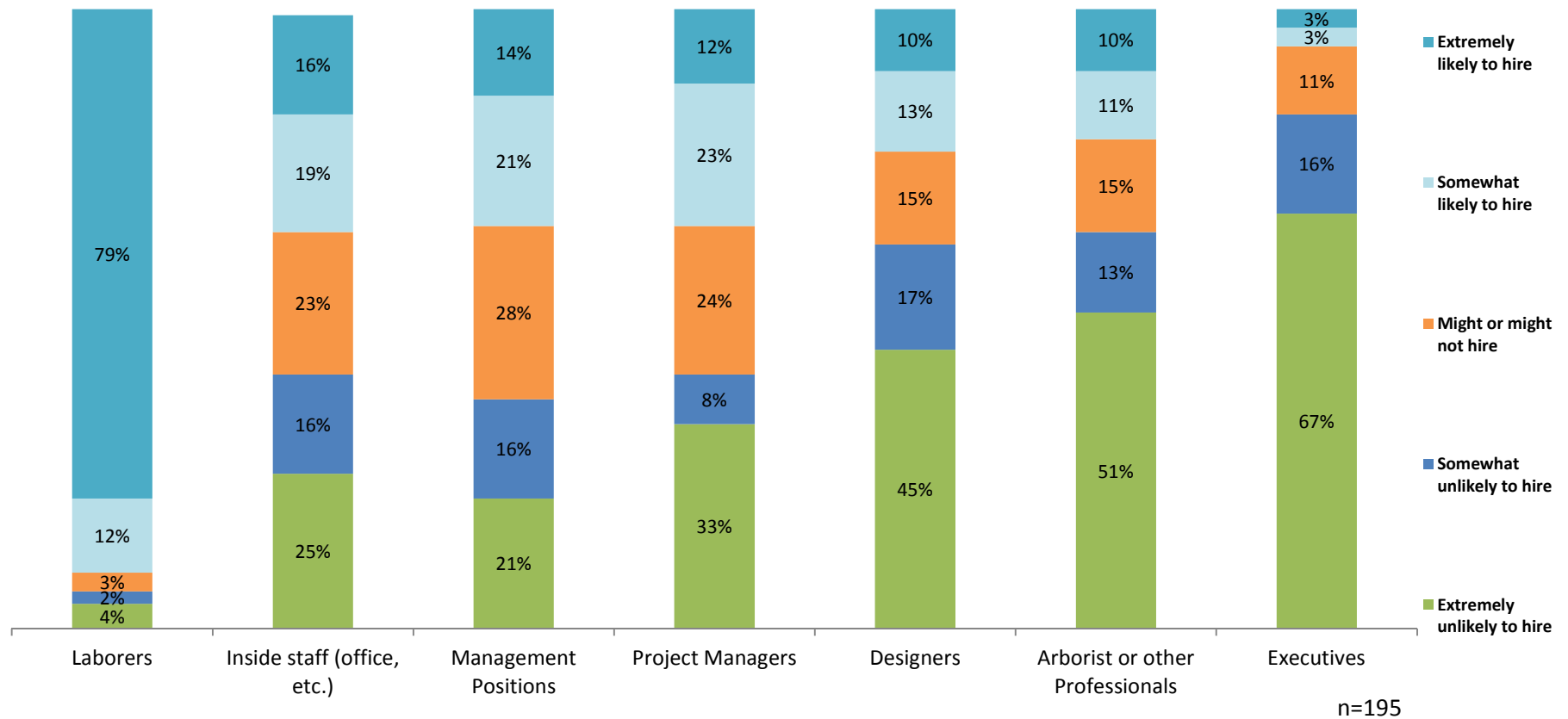
Q. Please rate how likely your company would be to hire for the following positions in the next year.



# 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.

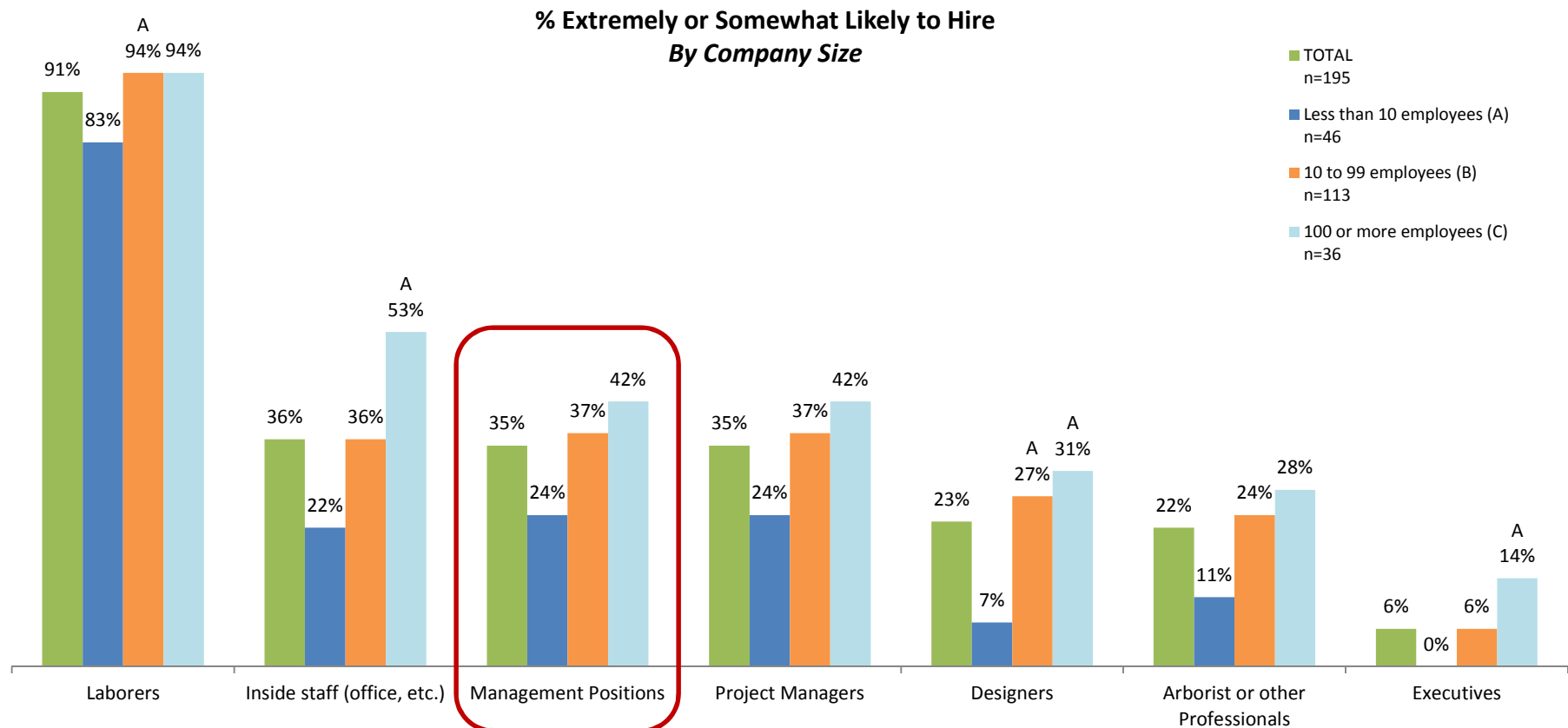


Note: Don't Know responses removed



# Future Hires Outlook

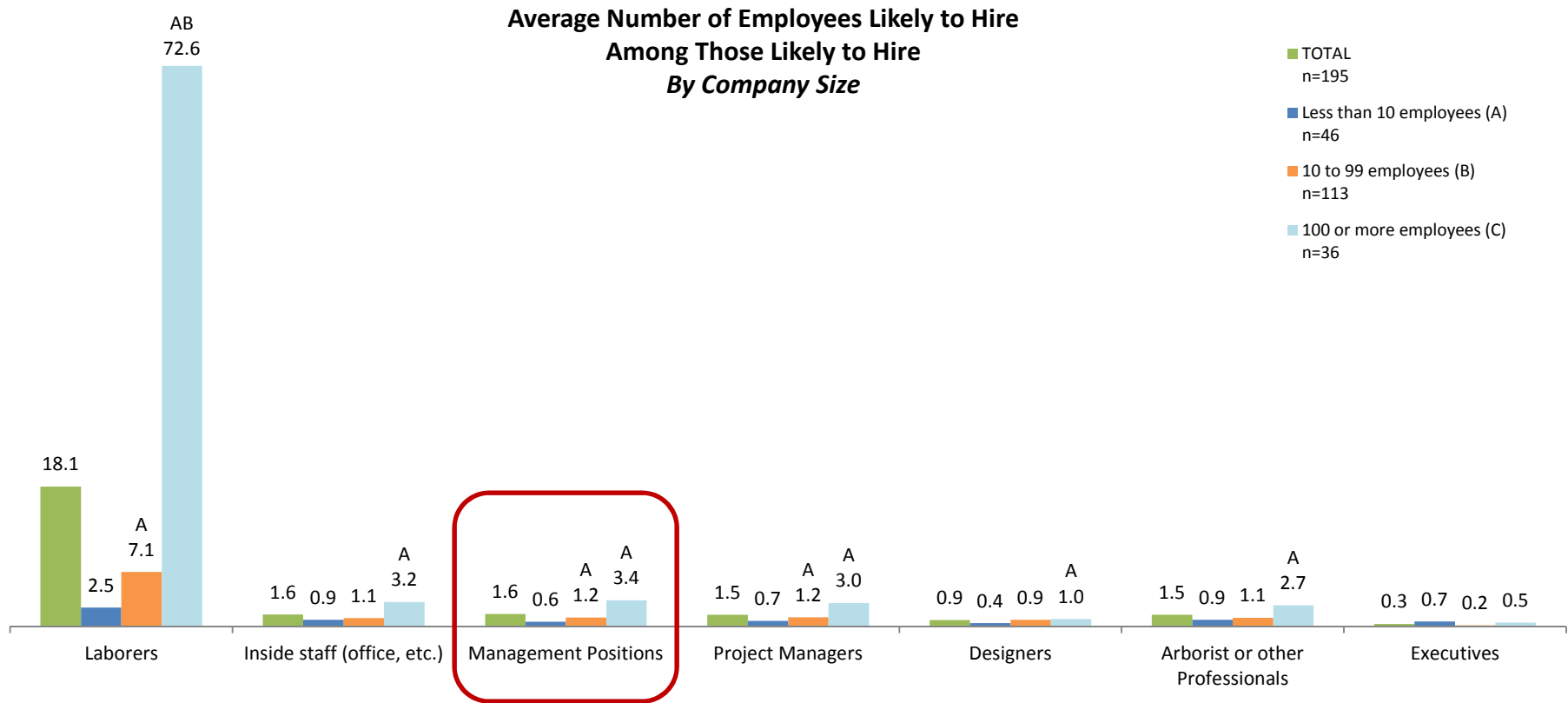
➤ Most companies in the industry expect to hire laborers. About 4 in 10 companies with at least 10 employees expect to hire management positions in the next year.



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.



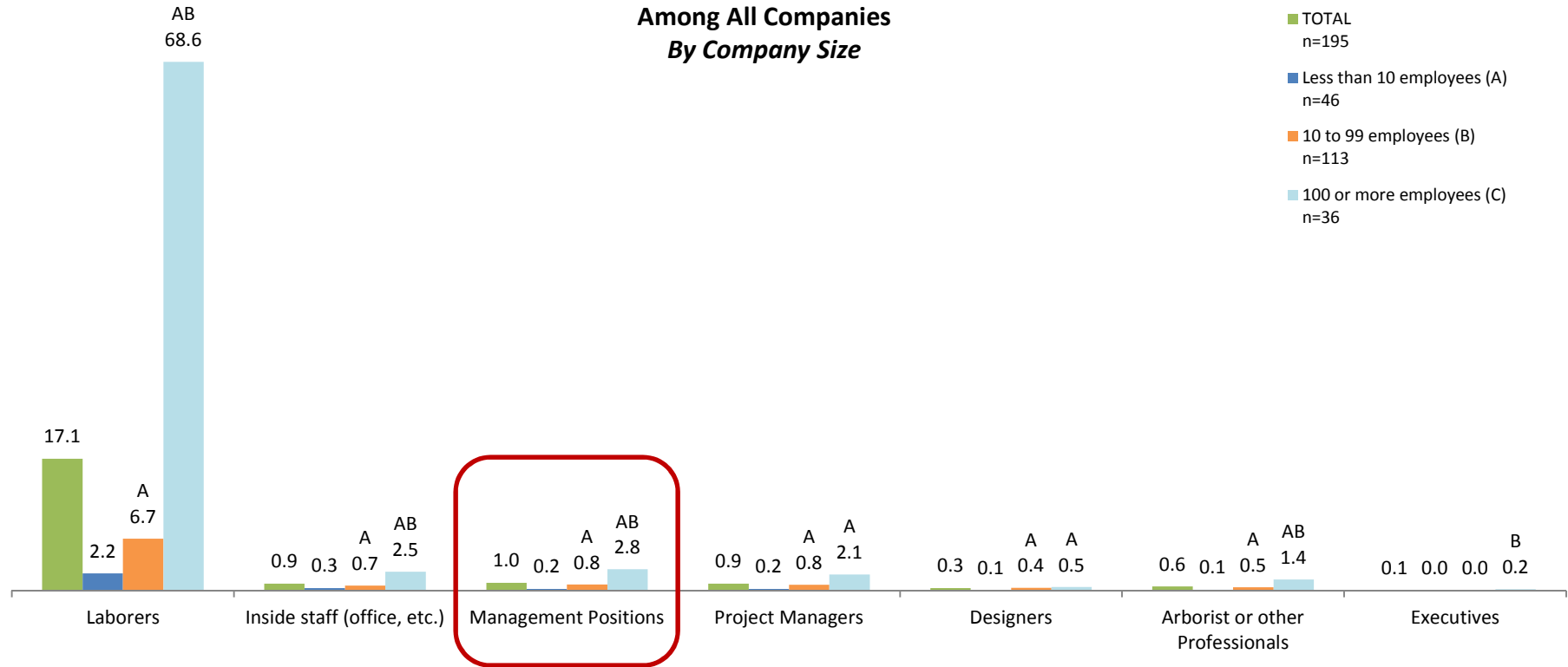
Note: Sample size varies by position

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]

# 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]



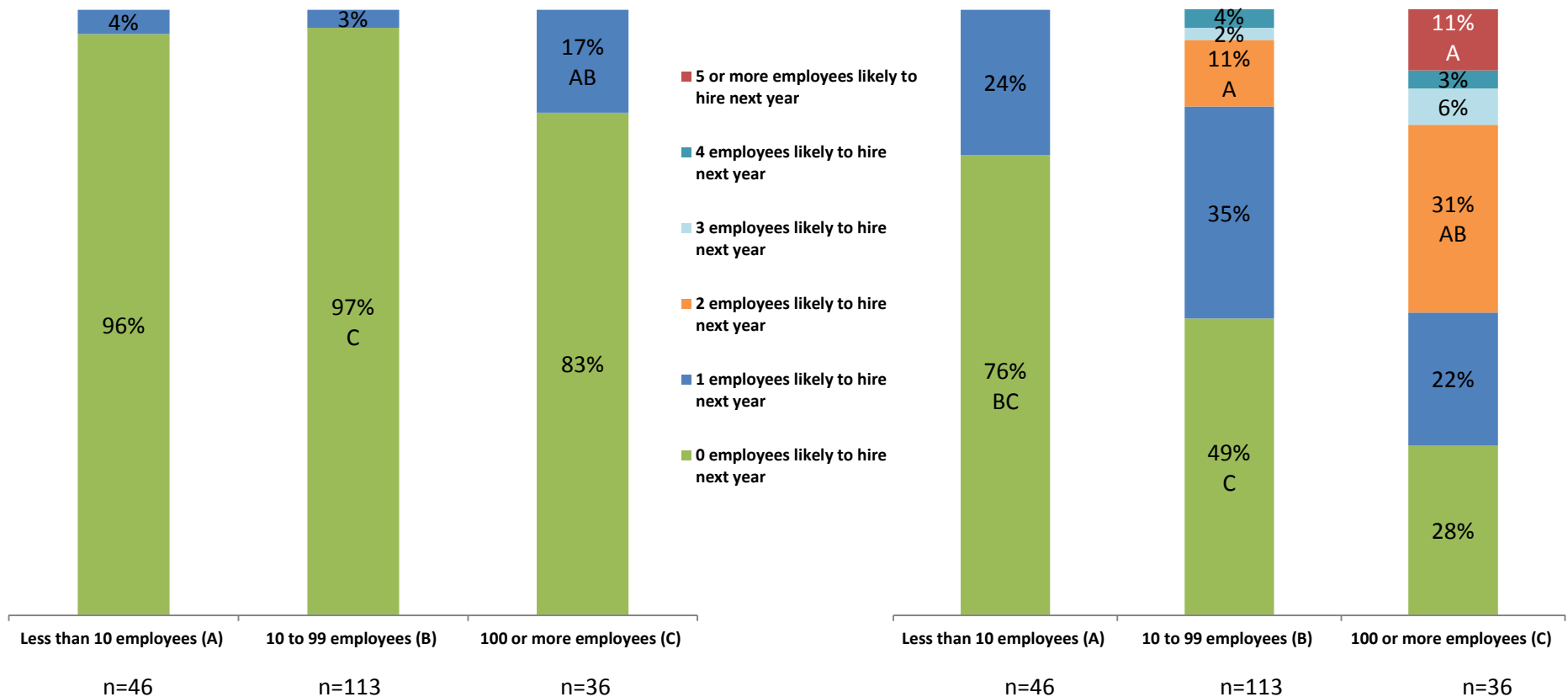
Note: Those Somewhat/Extremely unlikely to hire coded as 0 employees likely to hire

# Potential Future Hires Outlook

➤ None of the companies interviewed anticipates hiring more than 1 executive in the next year. Half of the largest companies expect to hire at least two management positions in the next year.

Number of EXECUTIVES Likely to Hire  
By Company Size

Number of MANAGEMENT POSITIONS Likely to Hire  
By Company Size



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

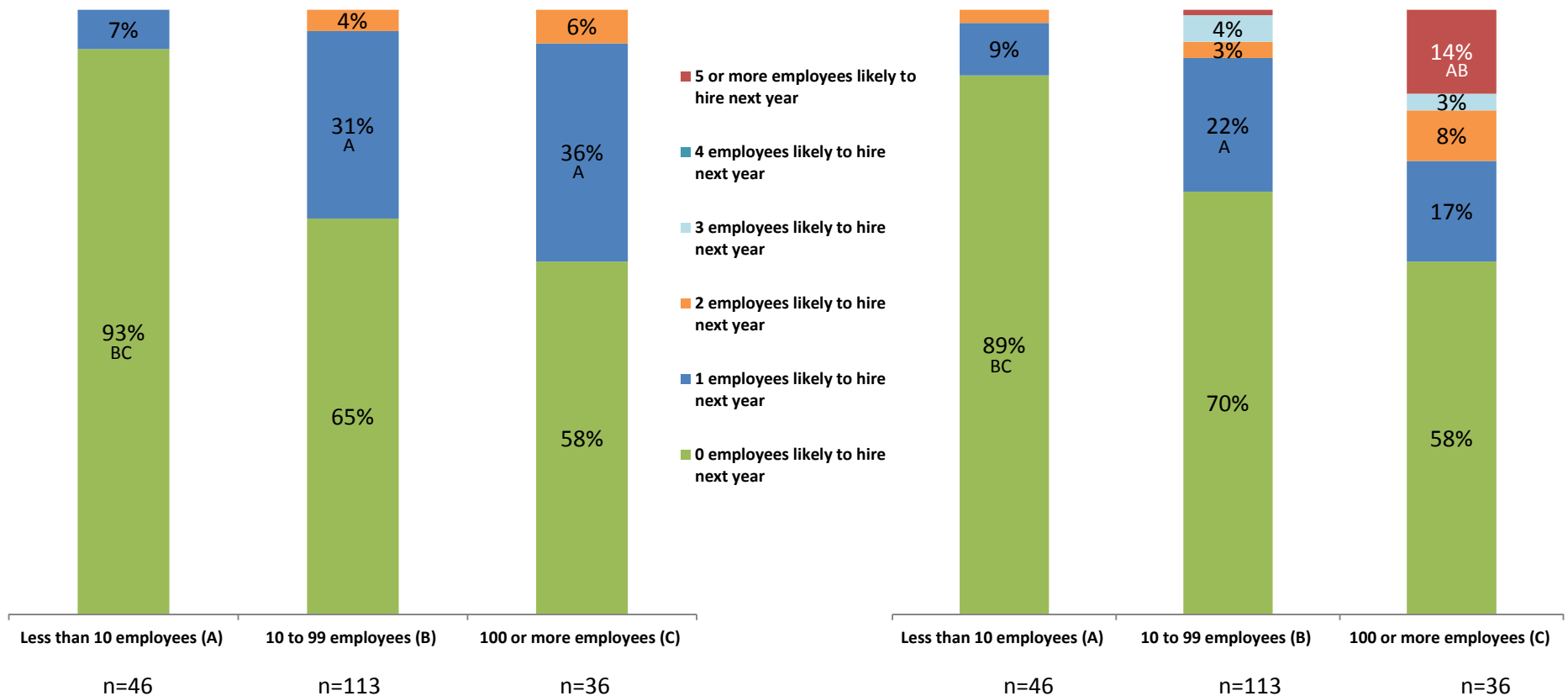
Q. And how many positions do you think you would be likely to hire next year? [Ask if Might or might not hire, Somewhat likely to hire, or Extremely likely to hire]

# Potential Future Hires Outlook

➤ Those hiring designers are most likely hiring 1 designer in the next year. 1 in 4 of the largest companies are looking to hire 2 or more arborists in the next year.

Number of DESIGNERS Likely to Hire  
By Company Size

Number of ARBORISTS/OTHER PROFESSIONALS Likely to Hire  
By Company Size



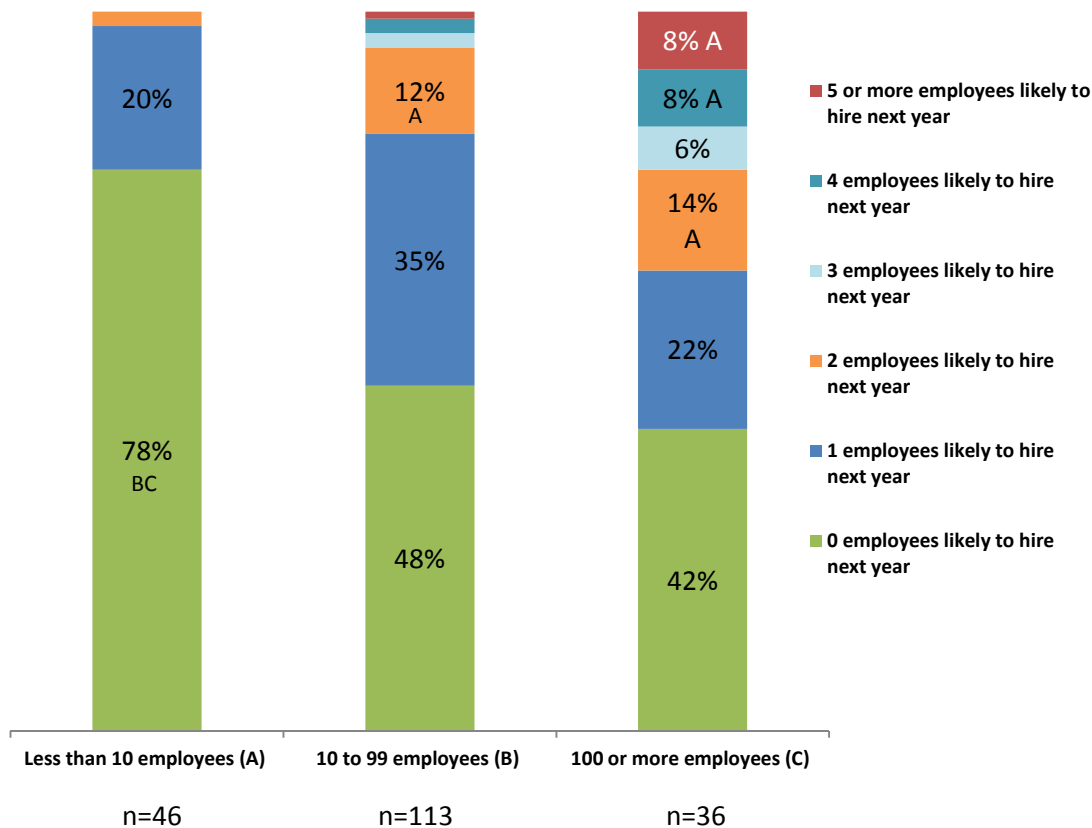
Note: Those Somewhat/Extremely unlikely to hire coded as 0 employees likely to hire

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]

# Potential Future Hires Outlook

➤ Half or more of companies with at least 10 employees are likely to hire 1 or more project managers in the next year.

Number of PROJECT MANAGERS Likely to Hire  
By Company Size

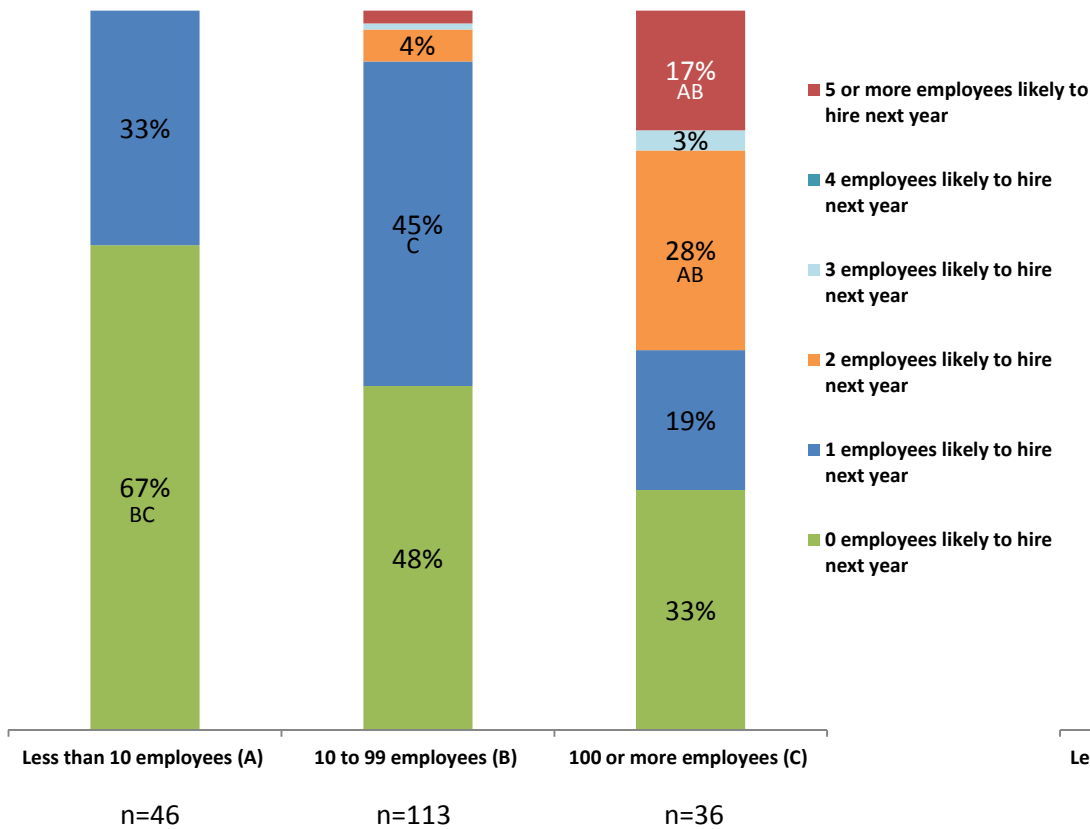


Note: Those Somewhat/Extremely unlikely to hire coded as 0 employees likely to hire

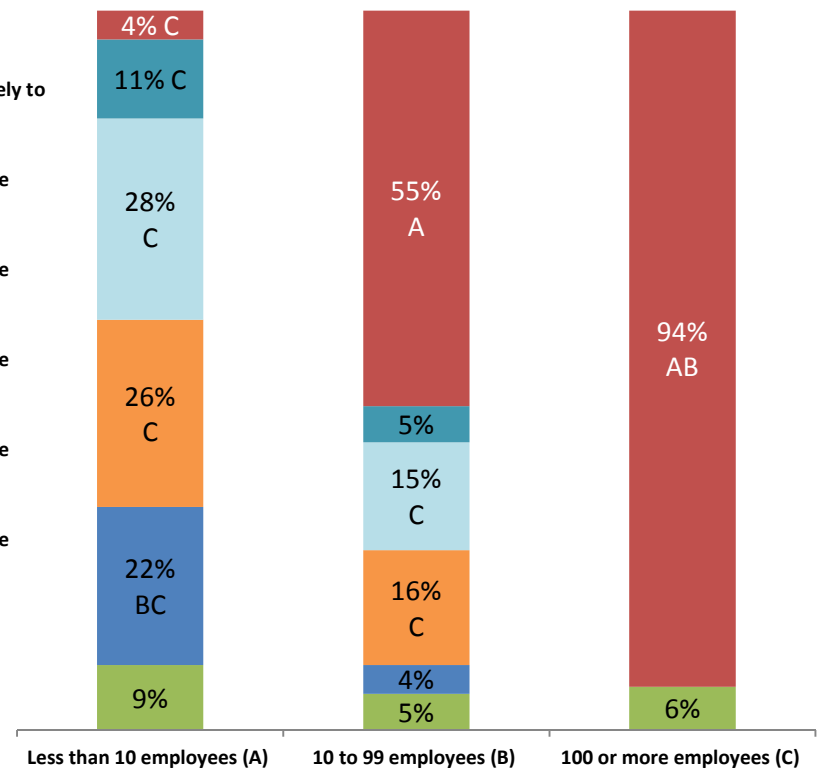
# Potential Future Hires Outlook

➤ Half of companies with 10 to 99 employees anticipate hiring 5 or more laborers, while almost all of the largest companies predict hiring 5 or more laborers.

Number of INSIDE STAFF Likely to Hire  
By Company Size



Number of LABORERS Likely to Hire  
By Company Size



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

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

*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*

# Advice for New Entrants: General

➤ Learning about the industry and hard work are the main advice given for those looking to enter the industry.

GENERAL ADVICE on Entering Industry		Total
Base		n=195
Know and / or Learn the Industry / Pros and Cons		28%
Love this industry / Work hard / Passionate		17%
Certifications (s) in Green Industry / PLANET , etc.		13%
Listen / Learn / Continue education		13%
Learn from ground up / Be willing to learn anything needed		13%
Communications: Oral / Written / People Management		9%
Dependable / Positive / Ethical / Prayerful		9%
Internships / Apprenticeships / Hands on experience		9%
Make and / or attain goals / Realistic / Patience		8%
Flexible to changes and / or methods		8%
Business and Finance Concepts		8%
Industry can offer success and rewards		7%
Service Industry / Customer Service / Asset to Clients		7%
Training / Classes / Join Associations		7%
Professional / Fair to employees or clients / Pride in work		7%
Enhance and / or Improve your company		7%
Lead by example / To teach a job you need to know the job		6%
Great Career / Opportunities / Great Industry		6%
Seek a successful company / Good Reputation / Track Record		5%
Focus / Ability to implement plans		5%
Stay current with Industry changes		5%
Critical hiring process / Plan for probation		4%
Education / Degree		4%
Management Skills / Finance / Time Efficiencies		3%
Take ownership of your position / Be the best at what you do		3%

Note: Responses 3% or higher are shown

Q. What general advice would you give new entrants entering the industry?

# Advice for New Entrants: Education

➤ Getting a degree and studying specific topics in the field are the top suggestions given on education.

Advice on EDUCATION	Total
Base	n=195
Education / Degree / 2 yr minimum	42%
Multi Level Classes / Specific Fields / Pertinent Knowledge	28%
Continue education / learning	26%
Management: Business / Finance / Accounting	23%
Know all variables of the Industry / Stay Current	21%
Experience / Hands On / School of Hard Knocks	14%
Certification(s) / Licenses / PLANET	12%
Horticulture	10%
Personnel Mgt / People Skills / HR Knowledge	8%
Listen / Willing to Learn / Mentor / Communicate	6%
Landscape / Design	6%
Professional / Honest / Pride in your hard work	6%
Positive Attitude / Be Passionate / Do what you love	4%
Problem Solver / Analytical / Receptive to change	3%
Agriculture / Irrigation	2%
Internship with a successful company	2%
Team player	2%
Learn to speak Spanish	1%
Don't go into debt for schooling	1%
Compile Resume / Send to prospective clients	1%
Higher Education = Higher Earnings	1%
None	2%

Note: All Responses are shown

Q. What advice would you give new entrants in terms of: EDUCATION



# Advice for New Entrants: Training

➤ Starting with the basics and continuing to learn as you go are the main advice given on Training.

Advice on TRAINING	Total
Base	n=195
Train from the ground up / Multi Level training	17%
Continued Training in Industry and other fields	17%
Get field experience to understand all aspects of Industry	11%
Hands on experience	9%
Training gives a competitive edge / success	9%
On the job training / Internships / Apprenticeships	9%
Technical training / Specific fields in the industry	8%
Certification / Professional Training	7%
Goals and Plans for continued training	7%
Green Industry changes daily / Stay Current	6%
Listen / Absorb information regarding the Industry	5%
Continuing Education	5%
Create your own skill set	5%
Share your expertise / Train others	5%
OSHA / Safety Training for all	4%
Network / blogs / Join Relevant Associations /	4%
Continual Improvement / Strive to Improve Processes	4%
Know all of your employees and their skill sets	4%

Note: Responses 4% or higher are shown

Q. What advice would you give new management or executives entrants in terms of: TRAINING



# Advice for New Entrants: Entering Industry

➤ Learning the trade and making contacts are the most frequently suggested advice for how someone should approach entering the industry.

Advice on APPROACH TO ENTER INDUSTRY		Total
Base		n=195
Learn the trade / Research / Seminars / Experience		33%
Make contacts / Mentor / Seek successful and respected companies		19%
Hard Work / Start at the bottom / Do anything		14%
Positive attitude / Work ethic / Passionate / Motivated		10%
Make sure you love the outdoors		9%
Prepare for obstacles / Stressful / Challenge		8%
Education / Degree		7%
Find a company that promotes growth and advancement for all		6%
Business / Management Skills		5%
Work as apprentice / Internship for a small company		5%
People Person / Customer Service		4%
Learn Consumer needs / Environmental needs		4%
Find out what the expectations of your job is in advance		3%
Be realistic		3%
Build your team / Support all of your people		3%
Landscape Certification		3%
Be able to delegate / Organize / Time management		3%
Listen / Be sincere / Receptive to advice / Open minded		3%
Join local organizations		3%
Be honest		3%

*Note: Responses 3% or higher are shown*

Q. What advice would you give new management or executives entrants in terms of: APPROACH TO ENTERING INDUSTRY

# Advice for New Entrants: Overcome Stereotypes

➤ Working hard and maintaining a professional attitude/image are the most recommended ways to overcome stereotypes.

Advice on Ways To Overcome Perceived Stereotypes

Advice on OVERCOMING PERCEIVED STEREOTYPES	Total
Base	n=195
Hard work with rewards and advancement	28%
Professional image / Attitude / Appearance	21%
Education	17%
Gain knowledge of Green Industry / Seminars / Events	16%
Be insightful / Knowledgeable of your company and your work	13%
Problem Solver / Enthusiastic / Accept challenges /	13%
Be aware of the need for diverse education and background	11%
Growth in this Industry	10%
Become a consistent, reliable source of information	10%
Business and Management Skills a must	9%
Maintain consistent Standards and Expectations for employees	9%
Promote Landscaping Certification	7%
Individual Pride / Dedication / Competence / Creativity	7%
Positive attitude / Pride in your work / Have thick skin	7%
Profitable / Financial growth	6%
Know that you are making a difference / Ignore remarks	6%
Communication Skills / Listen to employees / People person	5%
Work as a team / All employees are important	5%
Love the outdoors / Casual atmosphere	5%
Success trumps stereotypes	5%
Prove your value / Join Chamber of Commerce	3%
Accept change	3%
Stay focused on goals	3%

Note: Responses 3% or higher are shown

Q. What advice would you give new entrants in terms of: WAYS TO OVERCOME PERCEIVED STEREOTYPES

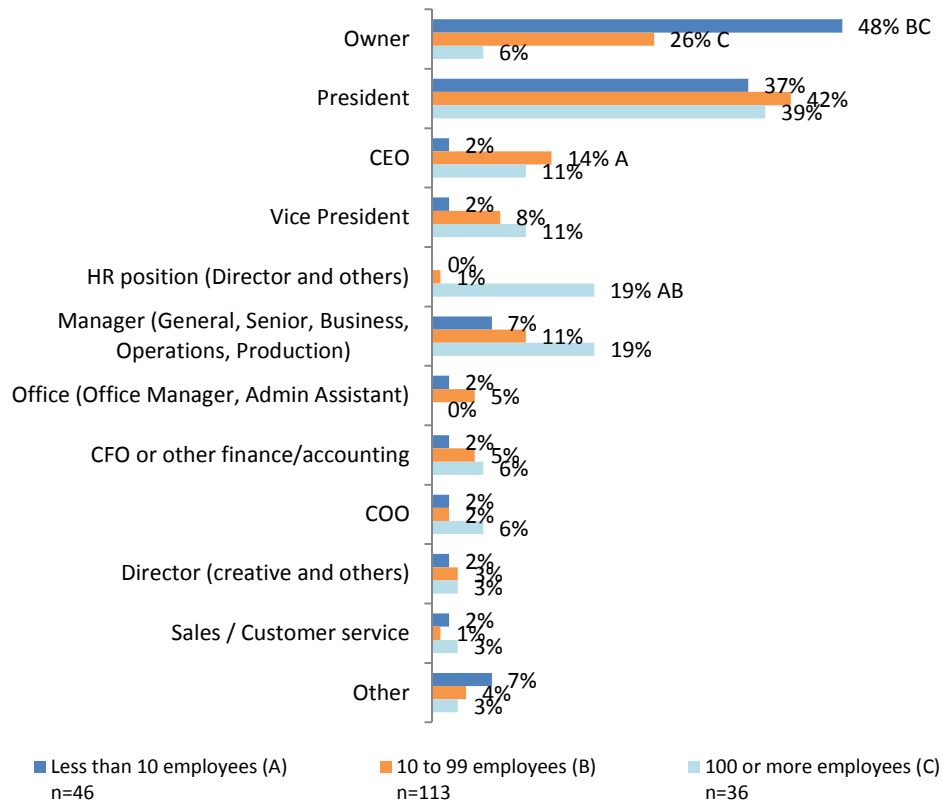


# Respondent & Firm Demographics

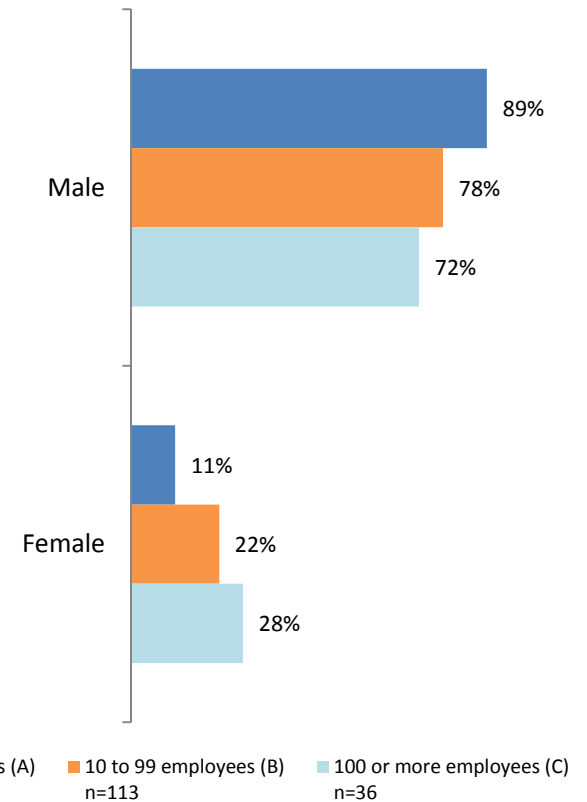
# Respondent Position

➤ 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?

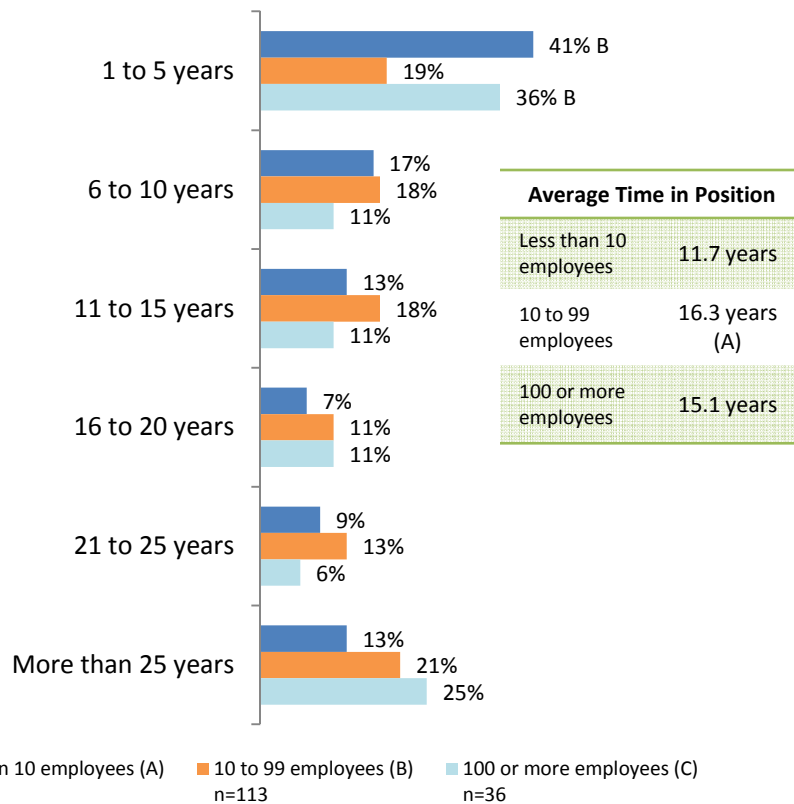




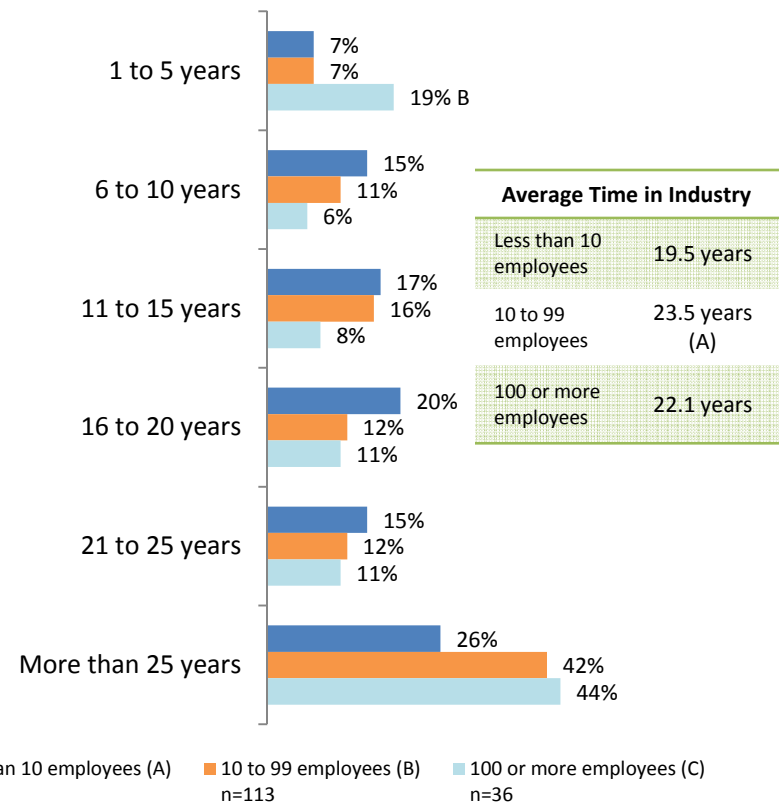
# Respondent Experience

➤ 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**



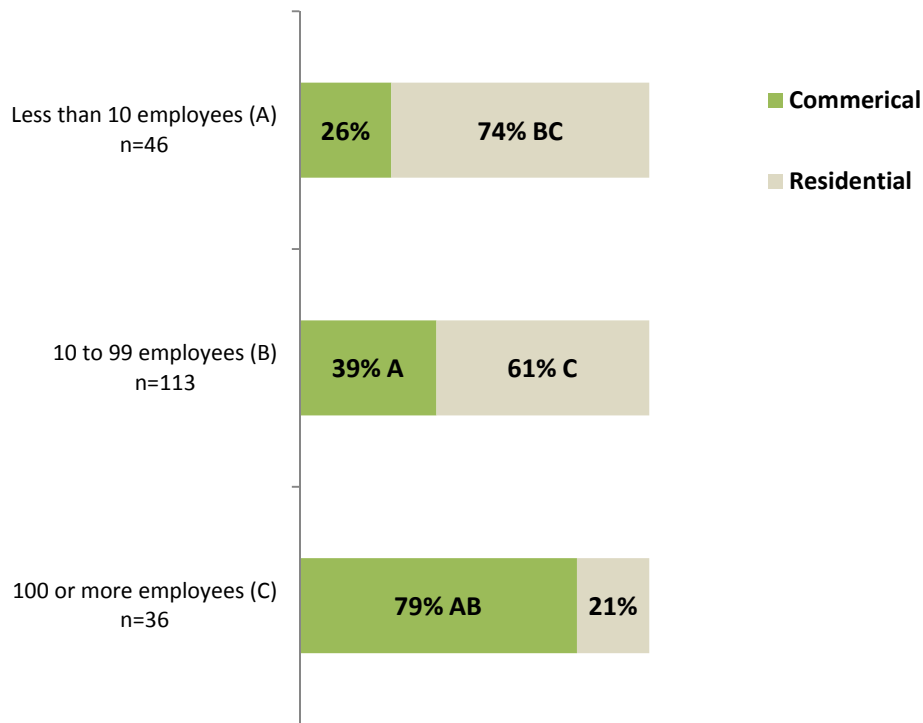
Q. How long have you been in this job position at your company?  
 Q. How long have you been in this industry?



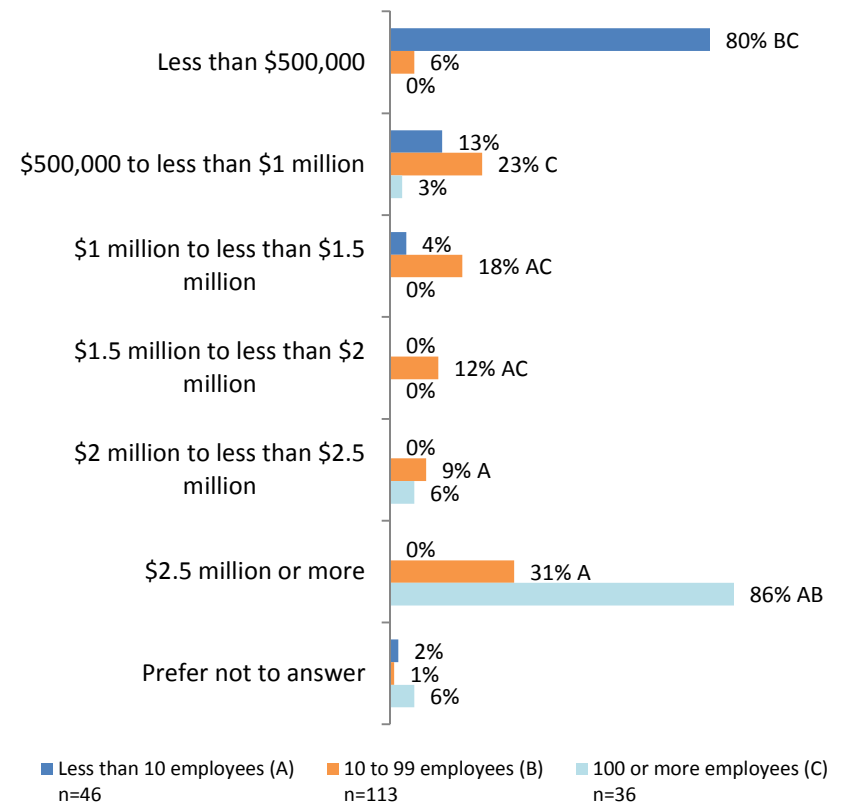
# Firm Incomes

- 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

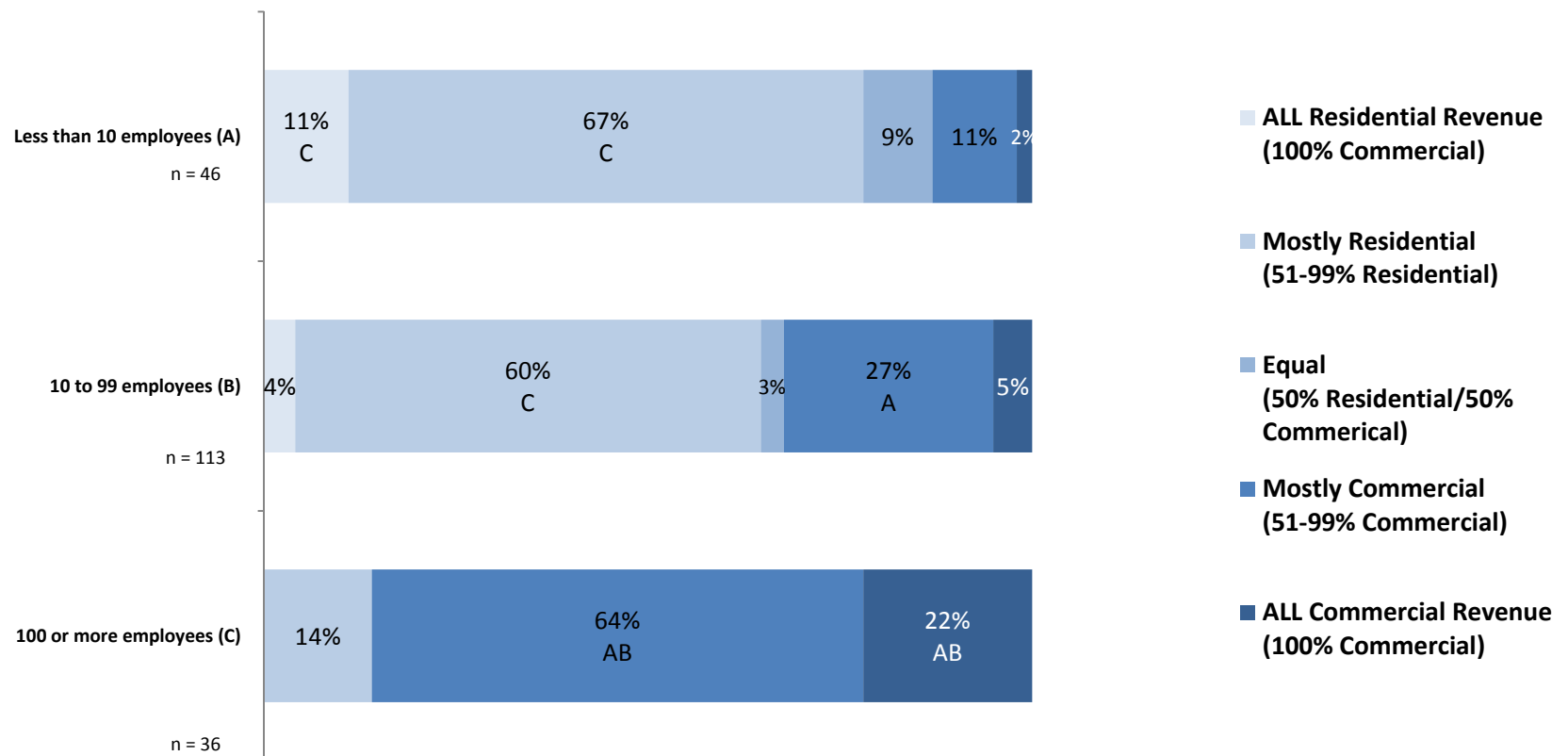


Q. What % of your company's total revenues would you say comes from Commercial projects or jobs and what % comes from Residential?  
Q. In terms of gross revenues, where do you estimate your firm will finish the calendar year 2014?

# 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

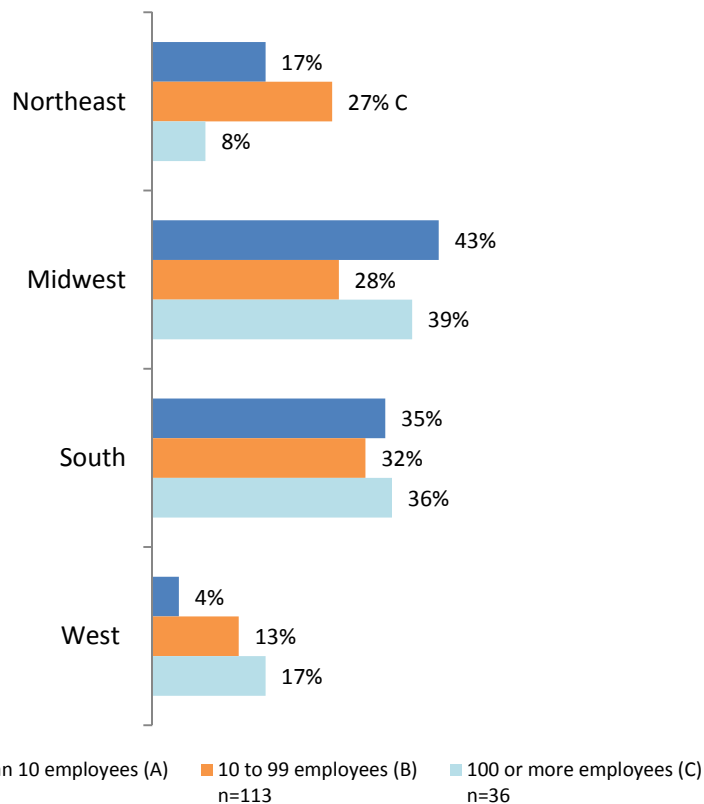


Q. What % of your company's total revenues would you say comes from Commercial projects or jobs and what % comes from Residential?

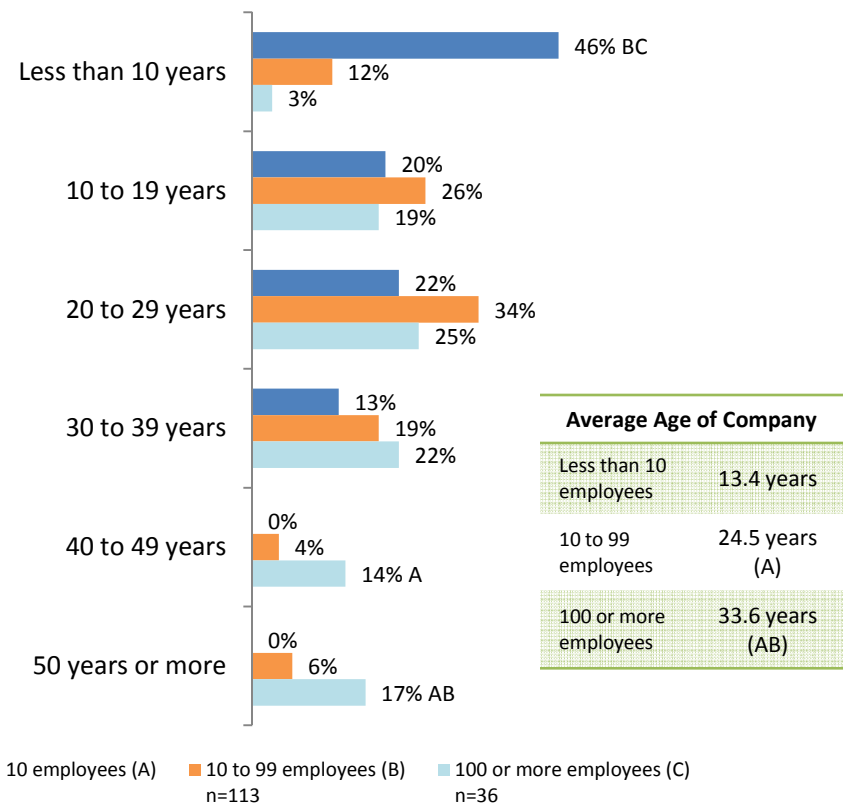
# Firm Demographics

- 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?

