WHILE UNCERTAINTY surrounds the industry due to COVID–19, the numbers from 2019 show the industry was healthy before the pandemic. After three consecutive years of median revenue decreasing, it grew to $297,000 compared to $273,000 in 2018. This is a good sign for the industry, although mean revenue decreased to $1.3 million from $1.5 in 2018, meaning the smaller and larger companies – the outliers – saw a slight decrease.

Contractors’ outlook for their companies is still positive, but those numbers did see a slight decrease. About 94% of landscapers were confident their companies would grow in last year’s survey, and this year it dropped to 88%. Last year 6% were “not confident at all” that their company would grow, and this year that number jumped to 11%.

Labor once again remains the top concern, but decreased from 6.9 out of 1-10 (10 means very concerned) scale in 2018 to 6.5 in 2019. COVID–19 was listed as a concern option this year and it tied for 7th out of 27 in our rankings with a 5.5 score. – Brian Horn
Approximately what percentage of your location's 2019 gross revenue came from each of the following property types?

- Single-family residential: 62%
- Commercial/industrial: 26%
- Multi-family structures: 8%
- Government/institutional: 4%

Approximately what was your location's gross revenue in 2019 (in USD)?

- More than $4 million: 7%
- $1 million-$3.99 million: 19%
- $500,000-$999,999: 17%
- $200,000-$499,999: 21%
- $50,000-$199,999: 21%
- Less than $50,000: 7%
- No Answer: 2%

In which state/province is your company location?

- **NORTHEAST**
  - New England: CT, MA, ME, NH, RI, VT
  - Middle Atlantic: NJ, NY, PA

- **MIDWEST**
  - East North Central: IL, IN, MI, OH, WI
  - West North Central: IA, KS, MN, MO, NE, ND, SD

- **SOUTH**
  - South Atlantic: DC, DE, FL, GA, MD, NC, PR/VI, SC, VA, WV
  - East South Central: AL, KY, MS, TN
  - West South Central: AR, LA, OK, TX

- **WEST**
  - Mountain: AZ, CO, ID, MT, NM, NV, UT, WY
  - Pacific: AK, CA, HI, OR, WA

Which of the following services does your location currently offer?

- Lawn Care/Chemical Application: 88%
- Landscape Maintenance: 87%
- Landscape Design/Construction: 71%
- Trees: 63%
- Irrigation: 47%
- Snow and Ice Management: 40%
- Vegetation Management: 16%
- Holiday Lightning: 15%
- Perimeter Pest Control: 15%
- Mosquito Control: 14%
- Nursery/Grower: 9%
- Interiorscaping: 7%
- Sports Turf: 9%
- Garden Center: 4%
Approximately what percentage of your location’s 2019 gross revenue came from each of the following services?

- Landscape and mowing maintenance: 19%
- Landscape Design/Construction: 13%
- Lawn Care/Chemical Application: 7%
- Snow and Ice Management: 4%
- Irrigation Installation/Maintenance/Service: 4%
- Trees & Ornamental: 4%

The Bottom Five

- Business Lending/Credit Crunch: 3.9
- Housing Foreclosures: 3.9
- High Fertilizer Prices: 3.7
- Immigration Regulations: 3.2
- H-2B Program Changes/Challenges: 2.5

How would you rate your concern with each of the following issues and their impact on your location’s business in the next three years? (10=very concerned; 1=not at all concerned)

- Quality Labor Shortage: 6.5
- Economic Recession: 3.3
- Presidential Election: 3.4
- Lowball Competitors: 3.3
- High Workers’ Compensation Costs: 3.2
- Personal Life Stress: 3.2
- COVID-19: 3.1
- High Health Insurance Costs: 3.1
- Customers Cutting Back/Canceling Services: 3.1
- Difficulty Raising Prices for Work: 2.7

I owned a larger business 10 years ago, and it just became a nightmare trying to keep people motivated, keep them on board. In my area, it’s a very transient workforce. It’s just me and I love it that way.”

Francis Connerney, Owner
Tampa Outdoor Solutions

How many full-time, part-time, and seasonal employees does your location currently have?

<table>
<thead>
<tr>
<th>Category</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>More than 50</td>
<td>8%</td>
</tr>
<tr>
<td>10-49</td>
<td>29%</td>
</tr>
<tr>
<td>5-9</td>
<td>22%</td>
</tr>
<tr>
<td>Less than 5</td>
<td>36%</td>
</tr>
<tr>
<td>No answer</td>
<td>5%</td>
</tr>
</tbody>
</table>

How many full-time, part-time, and seasonal employees does your location currently have?

MEDIAN: 7  MEAN: 19

The percentages at left show how many respondents ranked an issue as a major concern in the next three years by scoring it an 8, 9 or 10.

Survey Methodology

The survey sample of 17,850 represented emailable Lawn & Landscape recipients at unique company locations (one record per company location) in the U.S. and Canada classified with titles of owner, president, partner, executive, or general manager. The survey was fielded by Readex Research from June 25 to July 13, 2020. The margin of error for percentages based on 550 landscape contractors/lawn care operators is ±4.1 percentage points at the 95% confidence level.

MEDIAN: The number in the middle where extreme outliers are removed like respondents with extremely high or low revenue.

MEAN: The average of all respondents. Some charts don’t total to 100 percent due to rounding and omission of some answer options here.