

cautious OPTIMISM

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

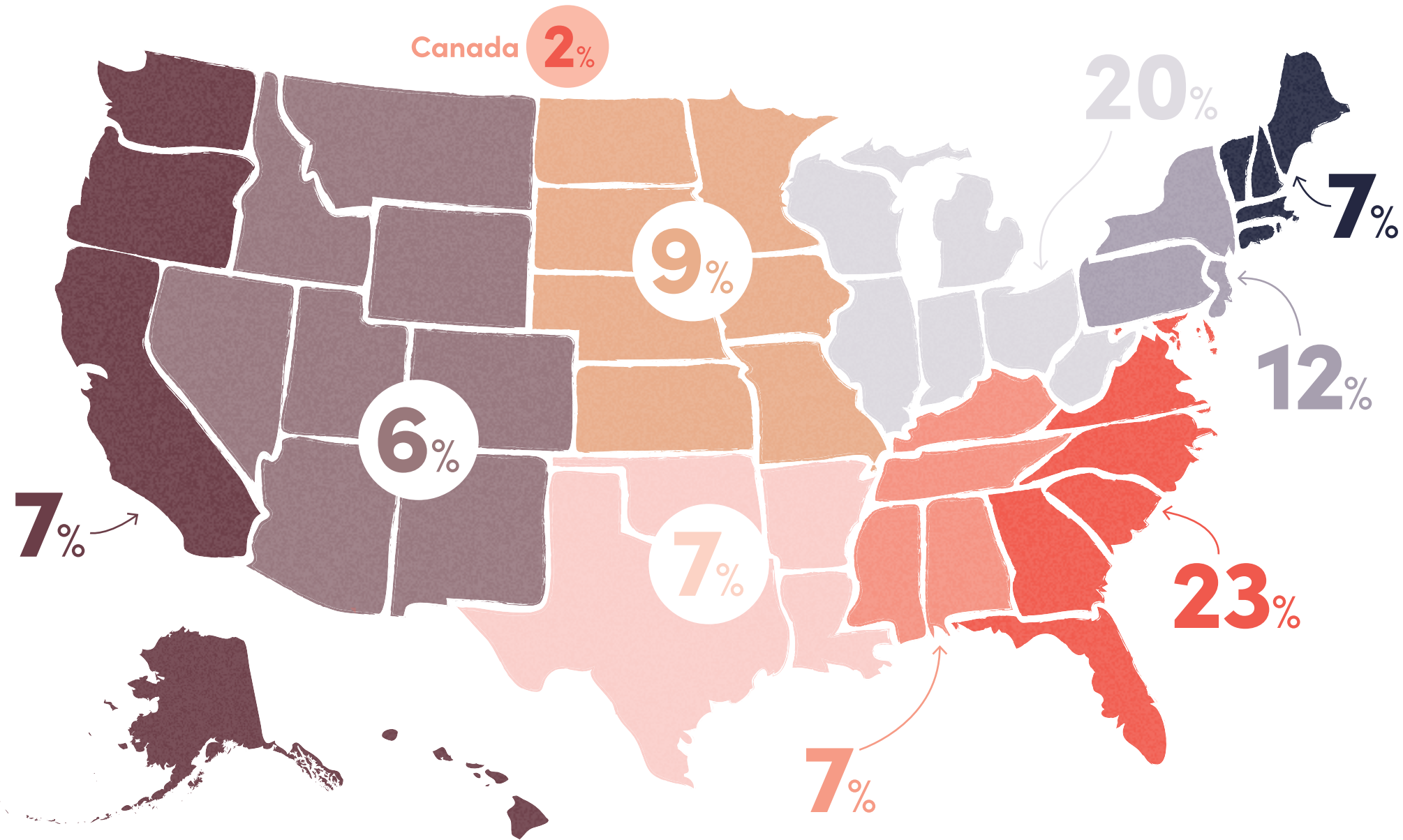
slight decrease. About 94% of landscapers were confident their companies would grow in last year's survey, and this year it dropped to 88%. Last year 6% were "not confident at all" that their company would grow, and this year that number jumped to 11%.

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*

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Did your location
turn a profit in 2019?

Yes

87%



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

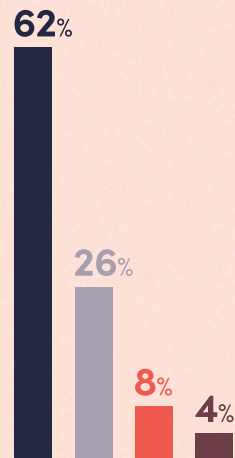
- **South Atlantic:** DC, DE, FL, GA, MD, NC, PR/VI, SC, VA, WV
- **East South Central:** AL, KY, MS, TN
- **West South Central:** AR, LA, OK, TX

WEST

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

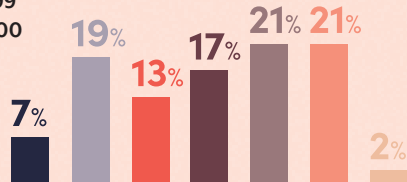
Approximately what percentage of your location's 2019 gross revenue came from each of the following property types?

- Single-family residential
- Commercial/industrial
- Multi-family structures
- Government/institutional



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

- More than \$4 million
- \$1 million-\$3.99 million
- \$500,000-\$999,999
- \$200,000-\$499,999
- \$50,000-\$199,999
- Less than \$50,000
- No Answer



Which of the following services does your location currently offer?

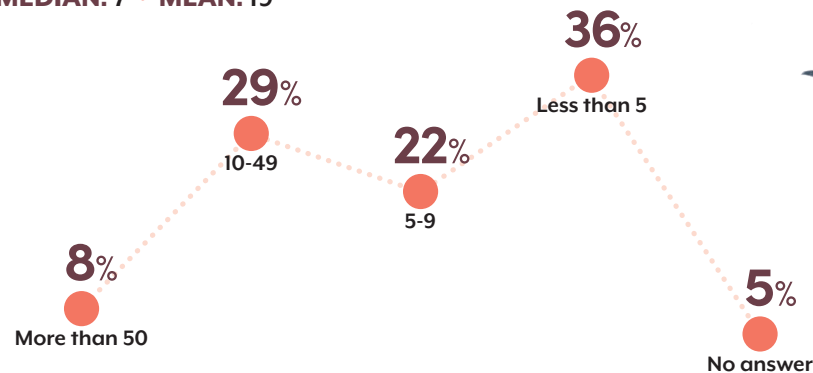


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“I owned a larger business 10 years ago,
and it just became a nightmare trying to
keep people motivated, keep them on board.
In my area, it’s a very transient workforce.
It’s just me and I love it that way.”

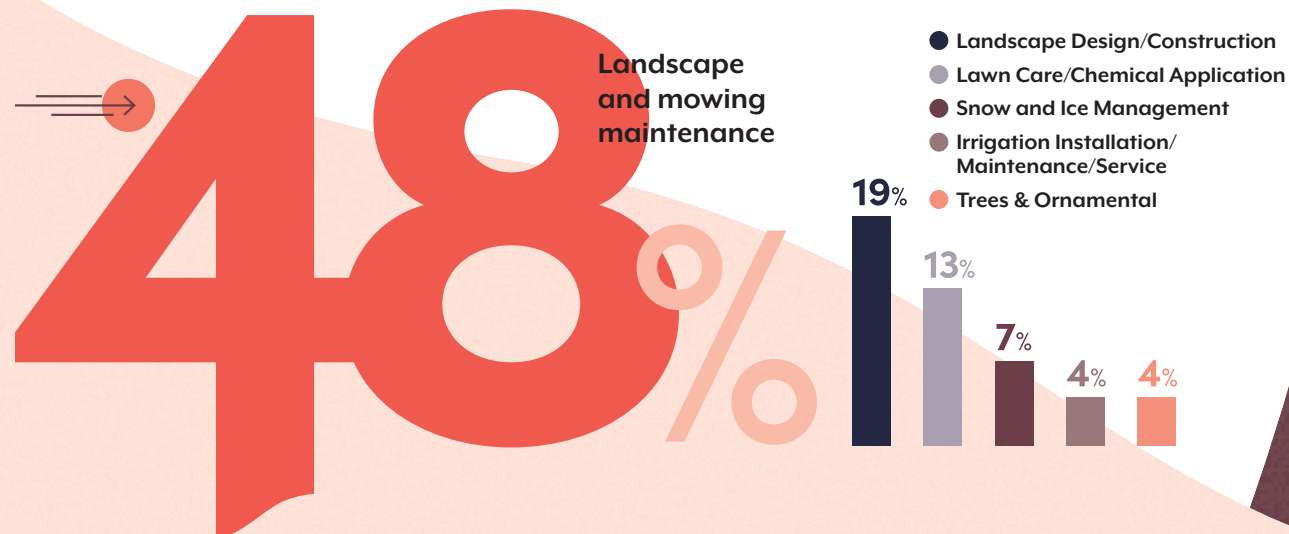
FRANCIS CONNERNEY, OWNER
TAMPA OUTDOOR SOLUTIONS
Read more on S14

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

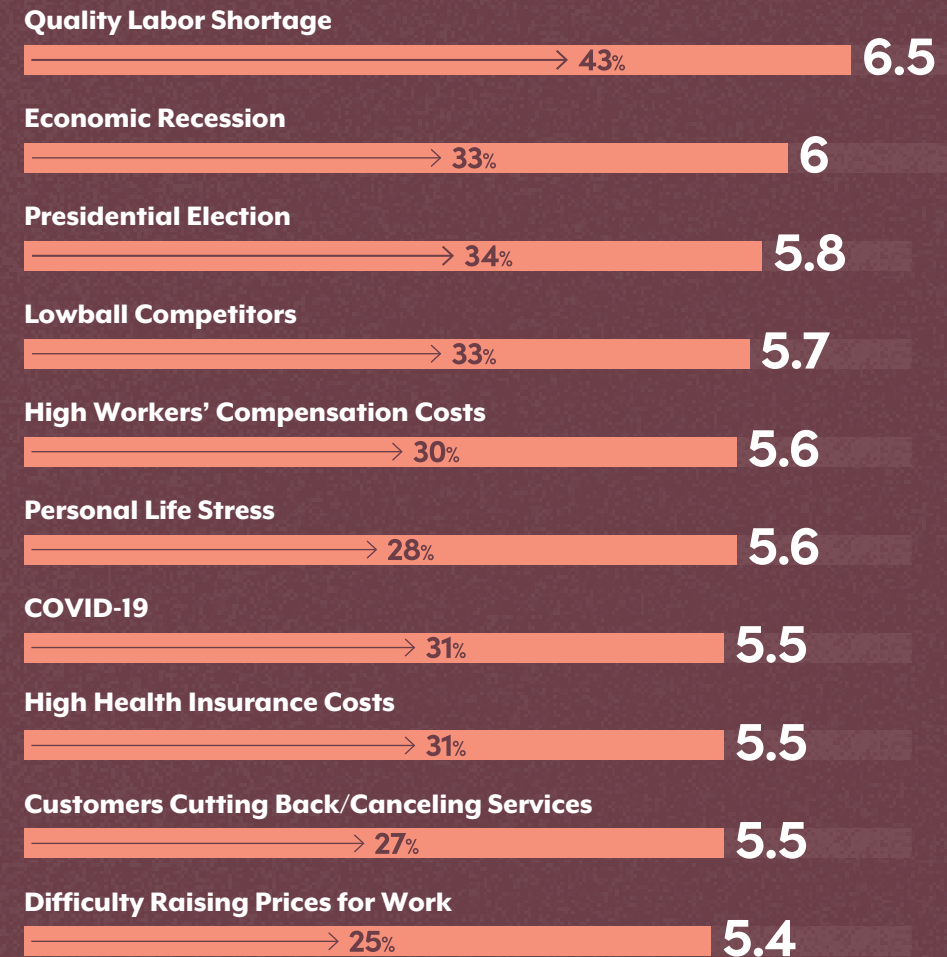
MEDIAN: 7 • MEAN: 19



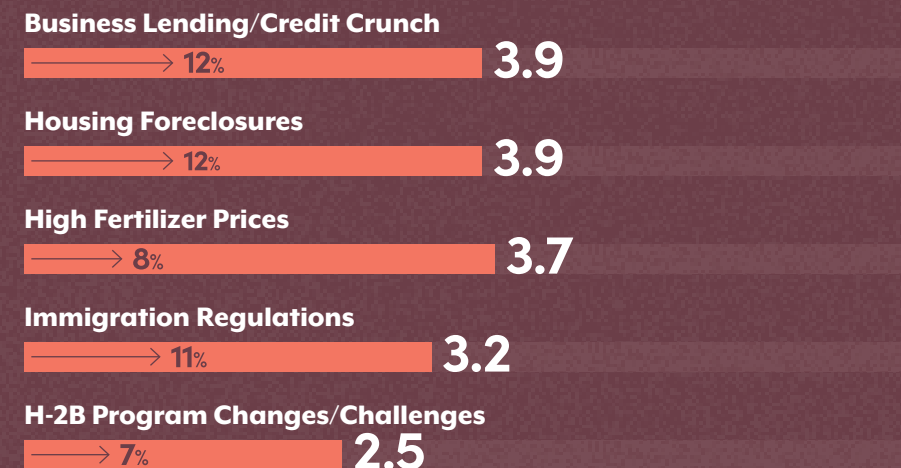
Approximately what percentage of your location’s
2019 gross revenue came from each of the following services?



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)



The Bottom Five



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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- 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 per cent due to rounding and omission of some answer options here.