

2009 Lawn & Landscape State of the Industry Survey

Q1. How many years has your company been in business?

			Total	Region			2009 Gross Sales	
			Respondents	West/Sou thwest	East/Midwest	South/So utheast	Under \$20,000	\$20,000 or more
Years in company business	Less than 5	Count	95	28	37	30	73	18
		Col %	16.2%	19.2%	13.6%	18.9%	27.0%	6.0%
	5 - 9	Count	135	26	45	62	82	53
		Col %	23.0%	17.8%	16.5%	39.0%	30.4%	17.7%
	10 - 19	Count	162	45	79	36	61	98
		Col %	27.6%	30.8%	29.0%	22.6%	22.6%	32.8%
	20 or more	Count	196	47	111	31	54	130
		Col %	33.3%	32.2%	40.8%	19.5%	20.0%	43.5%
Total	Count	588	146	272	159	270	299	
	Col %	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	

		Total	Region			2009 Gross Sales	
		Respondents	West/Sou thwest	East/Midwest	South/So utheast	Under \$20,000	\$20,000 or more
Years in company business	Mean	16.2	15.3	19.0	11.8	10.8	20.5

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Q2. Which of the following best describes your title or position?

			Total	Region			2009 Gross Sales	
			Respondents	West/Sou thwest	East/Midwest	South/Sou theast	Under \$20,000	\$20,000 or more
Title or position	Owner	Count	405	104	186	112	233	168
		Col %	69.7%	71.2%	68.6%	70.4%	86.6%	56.6%
	President	Count	75	18	42	15	22	50
		Col %	12.9%	12.3%	15.5%	9.4%	8.2%	16.8%
	Partner	Count	10	1	5	4	4	5
		Col %	1.7%	.7%	1.8%	2.5%	1.5%	1.7%
	Vice President	Count	21	8	8	4	4	16
		Col %	3.6%	5.5%	3.0%	2.5%	1.5%	5.4%
	Manager	Count	32	4	15	13	1	31
		Col %	5.5%	2.7%	5.5%	8.2%	.4%	10.4%
	Office Manager	Count	9	5	1	3	1	8
		Col %	1.5%	3.4%	.4%	1.9%	.4%	2.7%
	Foreman	Count	3	0	2	1	0	1
		Col %	.5%	.0%	.7%	.6%	.0%	.3%
	Sales	Count	10	1	6	3	2	8
		Col %	1.7%	.7%	2.2%	1.9%	.7%	2.7%
	Other	Count	16	5	6	4	2	10
		Col %	2.8%	3.4%	2.2%	2.5%	.7%	3.4%
Total	Count		581	146	271	159	269	297
		Col %	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

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Q3. In which state (region) is your headquarters, corporate or main office located?

			Total	Region			2009 Gross Sales	
			Respondents	West/Southwest	East/Midwest	South/Southeast	Under \$20,000	\$20,000 or more
Region	West/Southwest	Count	146	146	0	0	62	81
		Col %	25.3%	100.0%	.0%	.0%	22.9%	27.6%
	East/Midwest	Count	273	0	273	0	128	140
		Col %	47.2%	.0%	100.0%	.0%	47.2%	47.6%
	South/Southeast	Count	159	0	0	159	81	73
		Col %	27.5%	.0%	.0%	100.0%	29.9%	24.8%
Total	Count	578	146	273	159	271	294	
	Col %	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	

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Q4. What percentage of annual sales comes from the following services?

		Total	Region			2009 Gross Sales	
		Respondents	West/Sou thwest	East/Midwest	South/So utheast	Under \$20,000	\$20,000 or more
Lawn mowing/ maintenance	Mean	43.1	38.8	38.8	53.2	52.3	34.2
Lawn care	Mean	12.0	8.9	12.9	13.5	10.3	13.8
Construction/design-build	Mean	20.7	22.4	23.7	14.5	14.6	26.6
Irrigation	Mean	6.8	10.8	5.5	5.4	5.3	8.2
Tree & ornamental care	Mean	4.8	6.3	4.0	4.8	4.8	4.9
Snow & ice removal	Mean	5.7	2.9	10.4	.3	5.9	5.6
Other	Mean	6.9	9.9	4.6	8.1	6.8	6.6

Q5. What percentage of your annual sales come from the following property types?

		Total	Region			2009 Gross Sales	
		Respondents	West/Sou thwest	East/Midwest	South/So utheast	Under \$20,000	\$20,000 or more
Single-family residential	Mean	61.4	59.3	61.8	63.5	69.4	54.2
Multifamily structures	Mean	7.4	9.3	6.2	6.8	5.0	9.7
Commercial/industrial	Mean	26.4	24.8	28.2	24.6	22.1	30.1
Government/institutional	Mean	4.1	5.5	3.5	3.8	2.7	5.3
Other	Mean	.6	1.1	.0	1.2	.7	.5

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Q6. Which of the following does your company offer?

			Total	Region			2009 Gross Sales	
			Respondents	West/Sou thwest	East/Midwest	South/So utheast	Under \$20,000	\$20,000 or more
Turf	Turf (NET)	Cases	546	129	256	152	248	284
		Col %	92.5%	88.4%	93.8%	95.6%	91.5%	94.7%
	Mowing	Cases	448	107	207	127	209	228
		Col %	75.9%	73.3%	75.8%	79.9%	77.1%	76.0%
	Aeration	Cases	388	86	202	94	148	234
		Col %	65.8%	58.9%	74.0%	59.1%	54.6%	78.0%
	Seeding	Cases	423	89	219	110	174	241
		Col %	71.7%	61.0%	80.2%	69.2%	64.2%	80.3%
	Sodding	Cases	381	96	174	107	144	227
		Col %	64.6%	65.8%	63.7%	67.3%	53.1%	75.7%
	Hydroseeding	Cases	127	35	70	18	24	98
		Col %	21.5%	24.0%	25.6%	11.3%	8.9%	32.7%
	Lawn renovation	Cases	351	81	182	86	129	215
		Col %	59.5%	55.5%	66.7%	54.1%	47.6%	71.7%
	Edging/trimming	Cases	439	99	207	128	201	227
		Col %	74.4%	67.8%	75.8%	80.5%	74.2%	75.7%
	Fertilization	Cases	421	107	189	121	173	240
		Col %	71.4%	73.3%	69.2%	76.1%	63.8%	80.0%
	Weed control	Cases	405	99	172	130	174	222
		Col %	68.6%	67.8%	63.0%	81.8%	64.2%	74.0%
	Disease control	Cases	285	65	138	79	89	193
		Col %	48.3%	44.5%	50.5%	49.7%	32.8%	64.3%
	Insect control	Cases	287	56	141	87	94	187
		Col %	48.6%	38.4%	51.6%	54.7%	34.7%	62.3%
	Organic lawn care	Cases	130	37	65	24	37	90
		Col %	22.0%	25.3%	23.8%	15.1%	13.7%	30.0%
Total		Cases	590	146	273	159	271	300
		Col %	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

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Q6. Which of the following does your company offer?

			Total	Region			2009 Gross Sales	
			Respondents	West/Sou thwest	East/Midwest	South/So utheast	Under \$20,000	\$20,000 or more
Landscape construction	Landscape Construction (NET)	Cases	493	130	223	130	207	272
		Col %	83.6%	89.0%	81.7%	81.8%	76.4%	90.7%
	Design/build	Cases	363	90	175	93	129	223
		Col %	61.5%	61.6%	64.1%	58.5%	47.6%	74.3%
	Design only	Cases	42	10	21	11	14	26
		Col %	7.1%	6.8%	7.7%	6.9%	5.2%	8.7%
	Installation only	Cases	146	36	58	50	54	89
		Col %	24.7%	24.7%	21.2%	31.4%	19.9%	29.7%
	Lighting	Cases	221	64	99	54	69	146
		Col %	37.5%	43.8%	36.3%	34.0%	25.5%	48.7%
	Waterscapes	Cases	227	58	114	51	64	156
		Col %	38.5%	39.7%	41.8%	32.1%	23.6%	52.0%
	Retaining walls	Cases	320	73	172	70	110	200
		Col %	54.2%	50.0%	63.0%	44.0%	40.6%	66.7%
	Other hardscapes	Cases	290	73	148	64	98	183
		Col %	49.2%	50.0%	54.2%	40.3%	36.2%	61.0%
Total		Cases	590	146	273	159	271	300
		Col %	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Q6. Which of the following does your company offer?

			Total	Region			2009 Gross Sales	
			Respondents	West/Sou thwest	East/Midwest	South/So utheast	Under \$20,000	\$20,000 or more
Irrigation	Irrigation (NET)	Cases	323	109	112	93	114	198
		Col %	54.7%	74.7%	41.0%	58.5%	42.1%	66.0%
	Installation	Cases	232	85	85	56	70	153
		Col %	39.3%	58.2%	31.1%	35.2%	25.8%	51.0%
	Maintenance	Cases	307	102	108	88	111	185
		Col %	52.0%	69.9%	39.6%	55.3%	41.0%	61.7%
Total		Cases	590	146	273	159	271	300
		Col %	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

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Q6. Which of the following does your company offer?

			Total	Region			2009 Gross Sales	
			Respondents	West/Sou thwest	East/Midwest	South/So utheast	Under \$20,000	\$20,000 or more
Trees & ornamental	Trees & ornamental (NET)	Cases	471	120	218	124	201	259
		Col %	79.8%	82.2%	79.9%	78.0%	74.2%	86.3%
	Fertilization	Cases	306	87	122	94	106	195
		Col %	51.9%	59.6%	44.7%	59.1%	39.1%	65.0%
	Insection control	Cases	233	59	99	73	64	164
		Col %	39.5%	40.4%	36.3%	45.9%	23.6%	54.7%
	Disease control	Cases	208	54	85	67	52	151
		Col %	35.3%	37.0%	31.1%	42.1%	19.2%	50.3%
	Installation	Cases	355	95	166	90	127	220
		Col %	60.2%	65.1%	60.8%	56.6%	46.9%	73.3%
	Trimming & removal	Cases	367	96	171	93	159	197
		Col %	62.2%	65.8%	62.6%	58.5%	58.7%	65.7%
	Macro/micro injection	Cases	67	17	31	17	8	56
		Col %	11.4%	11.6%	11.4%	10.7%	3.0%	18.7%
	Tree transplanting	Cases	158	39	81	38	59	95
		Col %	26.8%	26.7%	29.7%	23.9%	21.8%	31.7%
Total		Cases	590	146	273	159	271	300
		Col %	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

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Q6. Which of the following does your company offer?

			Total	Region			2009 Gross Sales	
			Respondents	West/Sou thwest	East/Midwest	South/So utheast	Under \$20,000	\$20,000 or more
Miscellaneous	Miscellaneous (NET)	Cases	534	130	249	144	233	283
		Col %	90.5%	89.0%	91.2%	90.6%	86.0%	94.3%
	Spring/fall cleanup	Cases	449	105	218	120	209	229
		Col %	76.1%	71.9%	79.9%	75.5%	77.1%	76.3%
	Seasonal color	Cases	299	81	121	90	94	197
		Col %	50.7%	55.5%	44.3%	56.6%	34.7%	65.7%
	Snow removal	Cases	234	39	180	14	88	140
		Col %	39.7%	26.7%	65.9%	8.8%	32.5%	46.7%
	Holiday lighting	Cases	89	25	41	23	26	61
		Col %	15.1%	17.1%	15.0%	14.5%	9.6%	20.3%
	Permieter pest control	Cases	86	18	39	29	22	62
		Col %	14.6%	12.3%	14.3%	18.2%	8.1%	20.7%
	Nursery/grower	Cases	60	19	26	13	12	48
		Col %	10.2%	13.0%	9.5%	8.2%	4.4%	16.0%
	Interior landscaping	Cases	35	14	12	9	13	22
		Col %	5.9%	9.6%	4.4%	5.7%	4.8%	7.3%
	Sports turf	Cases	70	8	39	22	15	51
		Col %	11.9%	5.5%	14.3%	13.8%	5.5%	17.0%
	Vegetation mgmt	Cases	121	30	52	36	42	77
		Col %	20.5%	20.5%	19.0%	22.6%	15.5%	25.7%
	Other	Cases	24	7	7	8	11	9
		Col %	4.1%	4.8%	2.6%	5.0%	4.1%	3.0%
	Total	Cases	590	146	273	159	271	300
		Col %	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

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Q6b. Which of the following new services does your company plan to offer next year?

			Total	Region			2009 Gross Sales	
			Respondents	West/Sou thwest	East/Midwest	South/So utheast	Under \$20,000	\$20,000 or more
New services offered	Design/build	Cases	49	11	23	15	22	25
		Col %	8.3%	7.5%	8.4%	9.4%	8.1%	8.3%
	Irrigation/water mgmt	Cases	71	24	29	18	39	30
		Col %	12.0%	16.4%	10.6%	11.3%	14.4%	10.0%
	Mowing/maintenance	Cases	45	14	21	10	23	21
		Col %	7.6%	9.6%	7.7%	6.3%	8.5%	7.0%
	Lawn care	Cases	49	12	22	15	24	24
		Col %	8.3%	8.2%	8.1%	9.4%	8.9%	8.0%
	Snow removal	Cases	38	10	27	1	21	16
		Col %	6.4%	6.8%	9.9%	.6%	7.7%	5.3%
	Trees & ornamental	Cases	34	13	13	8	10	22
		Col %	5.8%	8.9%	4.8%	5.0%	3.7%	7.3%
	Watescapes	Cases	61	22	17	22	33	28
		Col %	10.3%	15.1%	6.2%	13.8%	12.2%	9.3%
	Pest control	Cases	22	5	5	10	6	13
		Col %	3.7%	3.4%	1.8%	6.3%	2.2%	4.3%
	Holiday lighting	Cases	62	18	28	16	37	24
		Col %	10.5%	12.3%	10.3%	10.1%	13.7%	8.0%
	Landscape lighting	Cases	92	22	41	29	48	40
		Col %	15.6%	15.1%	15.0%	18.2%	17.7%	13.3%
	Mosquito control	Cases	54	5	25	22	19	33
		Col %	9.2%	3.4%	9.2%	13.8%	7.0%	11.0%
	Green/sustainability services	Cases	95	24	40	29	32	62
		Col %	16.1%	16.4%	14.7%	18.2%	11.8%	20.7%
	Other	Cases	16	5	3	8	2	11
		Col %	2.7%	3.4%	1.1%	5.0%	.7%	3.7%
Total		Cases	590	146	273	159	271	300
		Col %	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

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Q7. By what percentage have your total operating costs changed from 2008 to 2009?

		Total	Region			2009 Gross Sales	
		Respondents	West/Sou thwest	East/Midwest	South/So utheast	Under \$20,000	\$20,000 or more
% Up	Mean	15.0	17.1	12.6	17.5	19.0	11.5
% Down	Mean	17.3	23.7	12.9	18.6	20.7	14.0

		Total	Region			2009 Gross Sales	
		Respondents	West/Sou thwest	East/Midwest	South/So utheast	Under \$20,000	\$20,000 or more
Operating Costs	Net % change	3.4	.0	3.0	4.4	3.8	1.8

Q7b. By what percentage do you expect your total operating costs to change from 2009 to 2010?

		Total	Region			2009 Gross Sales	
		Respondents	West/Sou thwest	East/Midwest	South/So utheast	Under \$20,000	\$20,000 or more
% Up	Mean	13.1	13.9	10.4	17.2	16.2	9.3
% Down	Mean	11.5	13.9	8.6	13.2	15.1	9.2

		Total	Region			2009 Gross Sales	
		Respondents	West/Sou thwest	East/Midwest	South/So utheast	Under \$20,000	\$20,000 or more
Operating Costs	Net % change	7.3	5.8	6.4	10.2	10.4	4.0

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Q8a. By what percentage have your total gross sales revenue changed from 2008 to 2009 for the following?

		Total	Region			2009 Gross Sales	
		Respondents	West/Sou thwest	East/Midwest	South/So utheast	Under \$20,000	\$20,000 or more
Lawn maintenance - % up	Mean	18.6	21.3	16.7	19.2	21.0	16.5
Lawn maintenance - % down	Mean	16.0	15.0	12.1	24.9	19.9	12.2
Construction/design-build - % up	Mean	16.2	20.1	14.6	15.4	18.1	14.2
Construction/design-build - % down	Mean	23.5	24.6	20.9	26.4	23.5	23.5
Lawn care - % up	Mean	11.6	11.8	10.8	12.8	15.7	8.9
Lawn care - % down	Mean	13.2	9.1	11.0	18.5	16.1	10.7
Arbor/tree care - % up	Mean	7.0	5.2	7.2	9.4	5.7	7.9
Arbor/tree care - % down	Mean	13.4	10.2	13.1	14.4	11.6	15.3
Irrigation service - % up	Mean	21.3	22.5	22.0	19.1	18.7	22.1
Irrigation service - % down	Mean	17.2	19.6	12.8	19.6	17.5	17.0
Nursery grower - % up	Mean	5.3	3.1	3.4	10.5	2.6	7.8
Nursery grower - % down	Mean	10.5	16.3	5.5	12.7	3.2	17.3
Snow/ice control - % up	Mean	14.2	17.5	15.9	1.6	16.2	13.2
Snow/ice control - % down	Mean	11.8	10.1	13.0	9.7	10.5	13.0
Total revenue - % up	Mean	24.9	35.9	17.5	25.8	26.1	21.2
Total revenue - % down	Mean	21.7	29.4	16.7	24.2	25.1	19.5

Q8a. By what percentage have your total gross sales revenue changed from 2008 to 2009 for the following?

		Total	Region			2009 Gross Sales	
		Respondents	West/Sou thwest	East/Midwest	South/So utheast	Under \$20,000	\$20,000 or more
Lawn maintenance - % up	Net % change	6.3	8.9	5.6	5.3	6.0	6.5
Construction/design-build -	Net % change	-6.5	-5.6	-5.2	-9.8	-5.6	-7.5
Lawn care - % up	Net % change	-1.6	.4	-2.7	-.7	-2.7	-.7
Arbor/tree care - % up	Net % change	7.0	5.2	7.2	9.4	5.7	7.9
Irrigation service - % up	Net % change	4.0	5.9	7.2	-2.8	-.1	6.2
Nursery grower - % up	Net % change	-1.6	-5.2	-.5	-.2	.0	-3.0
Snow/ice control - % up	Net % change	5.4	8.8	6.6	-3.4	5.3	5.5
Total revenue - % up	Net % change	2.0	4.6	.4	1.8	3.9	-.8

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Q8b. What percentage do you expect your total sales revenue to change from 2009 to 2010 for the following?

		Total	Region			2009 Gross Sales	
		Respondents	West/Sou thwest	East/Midwest	South/Sou theast	Under \$20,000	\$20,000 or more
Lawn maintenance - % up	Mean	17.0	19.6	13.9	19.9	19.5	14.6
Lawn maintenance - % down	Mean	8.4	4.3	7.7	12.3	11.0	5.5
Construction/design-build - % up	Mean	14.7	17.1	12.9	16.1	17.1	13.3
Construction/design-build - % down	Mean	13.2	9.4	11.4	18.1	14.8	12.1
Lawn care - % up	Mean	15.6	22.2	13.1	15.5	16.5	15.0
Lawn care - % down	Mean	6.6	8.4	4.2	9.1	8.4	4.7
Arbor/tree care - % up	Mean	10.7	9.3	5.6	19.2	7.1	13.1
Arbor/tree care - % down	Mean	4.8	.6	2.9	5.8	1.3	8.3
Irrigation service - % up	Mean	17.7	21.0	14.6	18.2	23.0	14.4
Irrigation service - % down	Mean	10.9	6.8	4.2	22.1	13.0	9.5
Nursery grower - % up	Mean	7.5	7.4	3.6	13.6	5.4	8.9
Nursery grower - % down	Mean	3.3	3.6	.0	5.4	.3	5.9
Snow/ice control - % up	Mean	13.5	18.1	13.8	5.0	10.5	15.3
Snow/ice control - % down	Mean	5.1	9.8	2.7	4.1	5.9	4.6
Total revenue - % up	Mean	21.5	28.9	15.3	27.4	23.6	19.8
Total revenue - % down	Mean	10.9	12.1	6.9	16.3	11.4	10.7

Q8b. What percentage do you expect your total sales revenue to change from 2009 to 2010 for the following?

		Total	Region			2009 Gross Sales	
		Respondents	West/Sou thwest	East/Midwest	South/Sou theast	Under \$20,000	\$20,000 or more
Lawn maintenance - % up	Net % change	13.2	16.7	10.7	14.5	14.6	11.8
Construction/design-build -	Net % change	8.7	10.9	8.8	6.3	10.1	7.8
Lawn care - % up	Net % change	11.9	16.8	10.2	11.5	11.6	12.2
Arbor/tree care - % up	Net % change	6.9	7.4	3.6	11.6	4.7	8.5
Irrigation service - % up	Net % change	11.0	16.2	9.9	6.4	14.3	8.9
Nursery grower - % up	Net % change	4.1	4.0	2.6	7.4	3.5	4.5
Snow/ice control - % up	Net % change	9.6	9.7	11.3	1.7	7.0	11.1
Total revenue - % up	Net % change	16.5	20.4	12.8	20.0	19.2	18.4

2009 Lawn & Landscape State of the Industry Survey

Q9a. In what range will your company's gross sales be for 2009?

			Total	Region			2009 Gross Sales	
			Respondents	West/Southwest	East/Midwest	South/Southeast	Under \$20,000	\$20,000 or more
2009 Gross Sales	Less than \$50,000	Count	101	24	42	35	101	0
		Col %	17.7%	16.8%	15.7%	22.7%	37.3%	.0%
	\$500,000 - \$99,999	Count	85	18	45	22	85	0
		Col %	14.9%	12.6%	16.8%	14.3%	31.4%	.0%
	\$100,000 - \$199,999	Count	85	20	41	24	85	0
		Col %	14.9%	14.0%	15.3%	15.6%	31.4%	.0%
	\$200,000 - \$299,999	Count	69	14	31	22	0	69
		Col %	12.1%	9.8%	11.6%	14.3%	.0%	23.0%
	\$300,000 - \$499,999	Count	69	22	32	13	0	69
		Col %	12.1%	15.4%	11.9%	8.4%	.0%	23.0%
	\$500,000 - \$749,999	Count	36	9	18	8	0	36
		Col %	6.3%	6.3%	6.7%	5.2%	.0%	12.0%
	\$750,000 - \$999,999	Count	30	8	13	9	0	30
		Col %	5.3%	5.6%	4.9%	5.8%	.0%	10.0%
	\$1.0 million - \$1.9 million	Count	40	13	15	12	0	40
		Col %	7.0%	9.1%	5.6%	7.8%	.0%	13.3%
	\$2.0 million - \$3.9 million	Count	24	6	15	2	0	24
		Col %	4.2%	4.2%	5.6%	1.3%	.0%	8.0%
	\$4.0 million - \$6.9 million	Count	11	3	7	1	0	11
		Col %	1.9%	2.1%	2.6%	.6%	.0%	3.7%
	\$7.0 million or more	Count	21	6	9	6	0	21
		Col %	3.7%	4.2%	3.4%	3.9%	.0%	7.0%
Total	Count		571	143	268	154	271	300
		Col %	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

			Total	Region			2009 Gross Sales	
			Respondents	West/Southwest	East/Midwest	South/Southeast	Under \$20,000	\$20,000 or more
2009 Gross Sales	Mean		\$786,778	\$869,755	\$818,097	\$653,896	\$79,889	\$1,425,333

2009 Lawn & Landscape State of the Industry Survey

Q9b. In what range will your company's gross sales be for 2010?

			Total	Region			2009 Gross Sales	
			Respondents	West/Sou thwest	East/Midwest	South/Sou theast	Under \$20,000	\$20,000 or more
2010 Projected Gross Sales	Less than \$50,000	Count	77	17	34	26	77	0
		Col %	13.8%	12.1%	12.8%	17.7%	28.8%	.0%
	\$500,000 - \$99,999	Count	76	20	36	20	76	0
		Col %	13.6%	14.2%	13.5%	13.6%	28.5%	.0%
	\$100,000 - \$199,999	Count	86	15	47	24	83	3
		Col %	15.4%	10.6%	17.7%	16.3%	31.1%	1.0%
	\$200,000 - \$299,999	Count	58	13	25	18	27	31
		Col %	10.4%	9.2%	9.4%	12.2%	10.1%	10.6%
	\$300,000 - \$499,999	Count	83	23	38	20	4	79
		Col %	14.8%	16.3%	14.3%	13.6%	1.5%	27.1%
	\$500,000 - \$749,999	Count	43	12	23	7	0	43
		Col %	7.7%	8.5%	8.6%	4.8%	.0%	14.7%
	\$750,000 - \$999,999	Count	29	10	12	7	0	29
		Col %	5.2%	7.1%	4.5%	4.8%	.0%	9.9%
	\$1.0 million - \$1.9 million	Count	46	15	17	14	0	45
		Col %	8.2%	10.6%	6.4%	9.5%	.0%	15.4%
	\$2.0 million - \$3.9 million	Count	29	8	18	2	0	29
		Col %	5.2%	5.7%	6.8%	1.4%	.0%	9.9%
	\$4.0 million - \$6.9 million	Count	11	4	4	3	0	11
		Col %	2.0%	2.8%	1.5%	2.0%	.0%	3.8%
	\$7.0 million or more	Count	22	4	12	6	0	22
		Col %	3.9%	2.8%	4.5%	4.1%	.0%	7.5%
Total	Count		560	141	266	147	267	292
		Col %	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

			Total	Region			2009 Gross Sales	
			Respondents	West/Sou thwest	East/Midwest	South/Sou theast	Under \$20,000	\$20,000 or more
2010 Projected Gross Sales	Mean		\$866,920	\$903,369	\$903,853	\$767,007	\$106,461	\$1,560,103

2009 Lawn & Landscape State of the Industry Survey

Q10. Total customers and acres serviced?

		Total	Region			2009 Gross Sales	
		Respondents	West/Sou thwest	East/Midwest	South/So utheast	Under \$20,000	\$20,000 or more
Residential mowing - customers	Mean	71.8	93.1	67.2	64.4	37.9	109.1
Residential mowing - acres	Mean	73.8	83.8	78.6	60.6	36.0	115.8
Commercial mowing - customers	Mean	26.1	36.5	24.9	19.5	10.0	40.7
Commercial mowing - acres	Mean	169.9	230.8	150.7	158.6	44.6	277.8
Residential chemical/fert - customers	Mean	206.5	108.1	194.6	302.5	63.9	320.0
Residential chemical/fert- acres	Mean	165.9	124.1	124.1	277.6	98.4	219.3
Commercial chemical/fert - customers	Mean	55.2	51.5	30.8	98.1	18.5	77.9
Commercial chemical/fert - acres	Mean	151.3	219.5	61.9	240.2	12.5	225.6
Residential design/build - customers	Mean	41.0	26.2	56.0	27.9	21.5	55.7
Commercial design/build - customers	Mean	14.9	17.8	13.1	16.2	6.5	19.6
Residential irrigation - customers	Mean	54.8	79.9	44.2	32.5	19.3	77.1
Commercial irrigation - customers	Mean	27.4	26.6	23.3	38.1	11.6	36.4

Q11. Average charged for each service in 2009 and 2010 serviced?

		Total	Region			2009 Gross Sales	
		Respondents	West/Sou thwest	East/Midwest	South/So utheast	Under \$20,000	\$20,000 or more
Residential mowing - 2009	Mean	\$41.7	\$38.0	\$43.2	\$41.4	\$38.2	\$45.2
Residential mowing - 2010	Mean	\$44.1	\$40.3	\$45.3	\$44.6	\$40.7	\$47.6
Commercial mowing - 2009	Mean	\$49.5	\$50.1	\$48.9	\$50.0	\$48.7	\$50.4
Commercial mowing - 2010	Mean	\$52.6	\$54.3	\$51.1	\$54.0	\$51.7	\$53.5
Residential chemical lawn care - 2009	Mean	\$18.9	\$26.1	\$16.8	\$17.0	\$23.8	\$15.3
Residential chemical lawn care - 2010	Mean	\$20.0	\$28.4	\$18.0	\$16.7	\$24.5	\$16.7
Commercial chemical lawn care - 2009	Mean	\$58.1	\$60.8	\$52.2	\$68.2	\$52.3	\$61.4
Commercial chemical lawn care - 2010	Mean	\$60.0	\$66.1	\$54.7	\$64.5	\$55.0	\$62.7
Residential design/build - 2009	Mean	\$5,563.5	\$7,147.3	\$4,851.1	\$5,271.7	\$2,818.4	\$7,468.3
Residential design/build - 2010	Mean	\$6,419.7	\$8,145.4	\$5,728.1	\$5,992.7	\$3,983.2	\$8,073.6
Commercial design/build - 2009	Mean	\$9,918.4	\$10,375.9	\$7,709.6	\$14,569.4	\$4,295.0	\$13,076.2
Commercial design/build - 2010	Mean	\$11,042.5	\$12,069.4	\$8,785.4	\$15,278.4	\$5,978.2	\$13,735.4

2009 Lawn & Landscape State of the Industry Survey

Q12a. What do you project your 2009 NET profit to be?

			Total	Region			2009 Gross Sales	
			Respondents	West/Sou thwest	East/Midwest	South/So utheast	Under \$20,000	\$20,000 or more
2009 NET Profit	Less than 4%	Count	117	29	54	34	58	59
		Col %	21.8%	22.0%	21.2%	23.4%	22.9%	21.0%
	4% to 5%	Count	84	13	47	24	50	33
		Col %	15.6%	9.8%	18.4%	16.6%	19.8%	11.7%
	6% to 9%	Count	94	22	40	29	27	67
		Col %	17.5%	16.7%	15.7%	20.0%	10.7%	23.8%
	10% to 15%	Count	125	36	56	33	53	71
		Col %	23.3%	27.3%	22.0%	22.8%	20.9%	25.3%
	16% to 20%	Count	64	18	25	19	25	38
		Col %	11.9%	13.6%	9.8%	13.1%	9.9%	13.5%
	More than 20%	Count	53	14	33	6	40	13
		Col %	9.9%	10.6%	12.9%	4.1%	15.8%	4.6%
Total		Count	537	132	255	145	253	281
		Col %	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

			Total	Region			2009 Gross Sales	
			Respondents	West/Sou thwest	East/Midwest	South/So utheast	Under \$20,000	\$20,000 or more
2009 NET Profit	Mean		9.6%	10.2%	9.7%	8.8%	9.9%	9.3%

2009 Lawn & Landscape State of the Industry Survey

Q12b. What do you estimate your 2010 NET profit to be?

			Total	Region			2009 Gross Sales	
			Respondents	West/Sou thwest	East/Midwest	South/So utheast	Under \$20,000	\$20,000 or more
2010 NET Profit (estimate)	Less than 4%	Count	55	13	24	18	25	30
		Col %	10.4%	9.9%	9.8%	12.2%	9.9%	10.9%
	4% to 5%	Count	81	13	43	25	48	32
		Col %	15.3%	9.9%	17.5%	16.9%	19.0%	11.6%
	6% to 9%	Count	111	25	49	35	53	58
		Col %	20.9%	19.1%	19.9%	23.6%	21.0%	21.1%
	10% to 15%	Count	130	35	59	35	42	87
		Col %	24.5%	26.7%	24.0%	23.6%	16.7%	31.6%
	16% to 20%	Count	92	27	37	26	38	53
		Col %	17.4%	20.6%	15.0%	17.6%	15.1%	19.3%
	More than 20%	Count	61	18	34	9	46	15
		Col %	11.5%	13.7%	13.8%	6.1%	18.3%	5.5%
Total	Count		530	131	246	148	252	275
	Col %		100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

			Total	Region			2009 Gross Sales	
			Respondents	West/Sou thwest	East/Midwest	South/So utheast	Under \$20,000	\$20,000 or more
2010 NET Profit	Mean		11.1%	12.0%	11.1%	10.2%	11.3%	10.9%

2009 Lawn & Landscape State of the Industry Survey

Q13. Issues affecting business success in 2009-2010. Rating scale 1 to 10 (1 = low concern, 10 = high concern)

		Total	Region			2009 Gross Sales	
		Respondents	West/Sou thwest	East/Midwest	South/So utheast	Under \$20,000	\$20,000 or more
Community-based bans/restrictions: noise/emissions	Mean	3.0	3.5	2.8	2.8	3.2	2.9
Community-based bans/restrictions: pesticide/fert use	Mean	3.9	3.9	3.7	4.2	3.6	4.1
Community-based bans/restrictions: water/irrigation	Mean	5.0	6.1	4.0	5.4	4.7	5.3
Consumer confidence	Mean	6.7	6.4	6.8	6.6	6.3	7.0
Customers cancelling services	Mean	5.8	5.7	5.7	5.8	5.4	6.1
Delinquent payments	Mean	5.9	5.8	5.9	6.1	5.7	6.1
Fertilizer prices	Mean	5.5	5.4	5.4	5.8	5.1	5.8
Fuel prices	Mean	7.5	7.5	7.5	7.4	7.5	7.5
Generating quality leads	Mean	6.2	5.8	6.4	6.2	6.0	6.4
H-2B program challenges	Mean	3.6	4.2	3.2	3.5	3.1	4.0
Health insurance costs	Mean	6.0	6.7	5.8	5.6	5.4	6.6
Housing foreclosures	Mean	5.4	5.4	5.1	5.7	5.2	5.5
Immigration/illegal immigrant issues	Mean	4.4	5.4	3.9	4.4	3.9	4.9
Inflation/rising interest rates	Mean	6.0	6.0	5.9	6.3	5.9	6.2
Labor shortage	Mean	3.9	4.4	3.8	3.7	3.6	4.2
Low-ball competitors	Mean	7.0	7.1	7.2	6.6	6.6	7.4
New presidential administration	Mean	6.3	6.6	6.2	6.2	5.6	6.9
Overworked/stress	Mean	6.1	6.1	6.3	5.7	5.7	6.4
Weather problems	Mean	5.4	4.7	5.8	5.1	5.6	5.1
Weed/insect/disease outbreaks	Mean	4.3	3.8	4.3	4.8	4.3	4.4
Workers' comp costs	Mean	5.9	5.8	6.1	5.7	5.1	6.6

2009 Lawn & Landscape State of the Industry Survey

Q14. How confident are you in the ability of the landscape industry to rebound next year?

			Total	Region			2009 Gross Sales	
			Respondents	West/Sou thwest	East/Midwest	South/So utheast	Under \$20,000	\$20,000 or more
Confidence in rebound	Very confident	Count	179	49	78	52	88	91
		Col %	31.6%	34.5%	29.5%	33.8%	33.2%	30.8%
	Somewhat confident	Count	312	71	155	81	144	164
		Col %	55.1%	50.0%	58.7%	52.6%	54.3%	55.6%
	Not at all confident	Count	57	15	22	19	20	35
		Col %	10.1%	10.6%	8.3%	12.3%	7.5%	11.9%
What do we have to rebound from	Count	18	7	9	2	13	5	
	Col %	3.2%	4.9%	3.4%	1.3%	4.9%	1.7%	
Total	Count	566	142	264	154	265	295	
	Col %	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	

2009 Lawn & Landscape State of the Industry Survey

Q15. If you could fix one economic challenge to help your business in 2010, what would it be?

			Total	Region			2009 Gross Sales	
			Respondents	West/Sou thwest	East/Midwest	South/So utheast	Under \$20,000	\$20,000 or more
Fix one economic challenge	Taxes	Count	115	28	50	36	57	58
		Col %	20.4%	19.7%	19.0%	23.4%	21.4%	19.7%
	Credit-financing crunch/foreclosures	Count	81	22	38	19	35	45
		Col %	14.3%	15.5%	14.4%	12.3%	13.2%	15.3%
	Overall consumer confidence	Count	153	38	78	34	62	90
		Col %	27.1%	26.8%	29.7%	22.1%	23.3%	30.6%
	Residential customers cutting back/cancelling	Count	94	21	43	30	52	41
		Col %	16.6%	14.8%	16.3%	19.5%	19.5%	13.9%
	Commercial customers cutting back/cancelling	Count	50	10	20	20	27	21
		Col %	8.8%	7.0%	7.6%	13.0%	10.2%	7.1%
	Labor challenges/unemployment	Count	40	15	20	5	14	26
		Col %	7.1%	10.6%	7.6%	3.2%	5.3%	8.8%
	Health care challenges	Count	32	8	14	10	19	13
		Col %	5.7%	5.6%	5.3%	6.5%	7.1%	4.4%
Total	Count	565	142	263	154	266	294	
	Col %	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	

2009 Lawn & Landscape State of the Industry Survey

Q16a. Did you experience client cutbacks/service reductions/spending reductions this year?

			Total	Region			2009 Gross Sales	
			Respondents	West/Sou thwest	East/Midwest	South/So utheast	Under \$20,000	\$20,000 or more
Client cutbacks/service reductions/spending this year	Yes	Count	440	106	203	125	182	252
		Col %	78.4%	76.3%	77.5%	81.2%	68.9%	86.9%
	No	Count	121	33	59	29	82	38
		Col %	21.6%	23.7%	22.5%	18.8%	31.1%	13.1%
Total	Count	561	139	262	154	264	290	
	Col %	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	

Q16b. Did you experience client cancellations this year?

			Total	Region			2009 Gross Sales	
			Respondents	West/Sou thwest	East/Midwest	South/So utheast	Under \$20,000	\$20,000 or more
Client cancellations this year	Yes	Count	408	95	189	118	173	231
		Col %	71.7%	66.9%	71.1%	76.1%	64.8%	78.3%
	No	Count	161	47	77	37	94	64
		Col %	28.3%	33.1%	28.9%	23.9%	35.2%	21.7%
Total	Count	569	142	266	155	267	295	
	Col %	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	

q17a. If you saw client cutbacks, what percentage of revenue in cutbacks did you see?

			Total	Region			2009 Gross Sales	
			Respondents	West/Sou thwest	East/Midwest	South/So utheast	Under \$20,000	\$20,000 or more
Client cutbacks/service reductions/spending: % of revenue	Mean		11.2%	14.7%	9.2%	11.6%	10.4%	11.8%

q17b. If you saw client cancellations this year, what percentage of your client base cancelled services this year?

			Total	Region			2009 Gross Sales	
			Respondents	West/Sou thwest	East/Midwest	South/So utheast	Under \$20,000	\$20,000 or more
Client cancellations: % of client base	Mean		7.3%	8.8%	5.8%	8.7%	7.3%	7.3%

2009 Lawn & Landscape State of the Industry Survey

Q18. How many seasonal and year-round employees do you have?

		Total	Region			2009 Gross Sales	
		Respondents	West/Southwest	East/Midwest	South/Southeast	Under \$20,000	\$20,000 or more
Seasonal	Mean	9.5	10.7	9.5	8.5	2.4	16.6
Year-round	Mean	9.6	10.7	7.5	11.0	1.7	16.3

Q19. What does your company pay per hour for the following positions?

		Total	Region			2009 Gross Sales	
		Respondents	West/Southwest	East/Midwest	South/Southeast	Under \$20,000	\$20,000 or more
Mower operator - entry level	Mean	8.9	8.9	9.2	8.3	8.6	9.1
Mower operator - experienced	Mean	11.5	11.4	12.1	10.6	11.2	11.7
Spray technician - entry level	Mean	10.2	10.5	10.2	10.0	8.7	10.9
Spray technician - experienced	Mean	13.6	13.2	14.0	12.8	10.9	14.8
Construction worker - entry level	Mean	9.1	9.0	9.5	8.1	8.6	9.4
Construction worker - experienced	Mean	13.0	13.0	13.8	11.0	12.0	13.5
Irrigation technician - entry level	Mean	9.2	10.1	8.6	8.7	8.2	9.7
Irrigation technician - experienced	Mean	13.8	15.4	13.0	12.6	12.2	14.5

Q20. Average annual salary for the following positions.

		Total	Region			2009 Gross Sales	
		Respondents	West/Southwest	East/Midwest	South/Southeast	Under \$20,000	\$20,000 or more
Crew Foreman/leader	Mean	\$31,004	\$31,515	\$30,683	\$31,466	\$26,667	\$32,051
Designer	Mean	\$40,888	\$40,263	\$42,446	\$38,600	\$34,125	\$42,568
Architect	Mean	\$48,833	\$55,200	\$48,000	\$45,714	\$44,250	\$51,125
Account Manager	Mean	\$39,847	\$41,025	\$40,856	\$36,381	\$28,667	\$41,400
Supervisor	Mean	\$40,964	\$42,078	\$41,572	\$38,152	\$30,212	\$42,311
Owner/President	Mean	\$71,439	\$78,135	\$62,680	\$65,890	\$40,782	\$89,915

2009 Lawn & Landscape State of the Industry Survey

Q21a. Do you offer financing for your customers?

			Total	Region			2009 Gross Sales	
			Respondents	West/Sou thwest	East/Midwest	South/So utheast	Under \$20,000	\$20,000 or more
Financing offered	Yes	Count	80	18	36	24	20	59
		Col %	14.1%	12.9%	13.6%	15.7%	7.6%	20.1%
	No	Count	489	122	229	129	243	235
		Col %	85.9%	87.1%	86.4%	84.3%	92.4%	79.9%
Total	Count	569	140	265	153	263	294	
	Col %	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	

Q21b. Average cost of projects financed.

			Total	Region			2009 Gross Sales	
			Respondents	West/Sou thwest	East/Midwest	South/So utheast	Under \$20,000	\$20,000 or more
Average cost of projects financed	Mean		\$7,533	\$8,359	\$8,744	\$5,500	\$3,094	\$8,905

Q21c. Average number of finance options offered.

			Total	Region			2009 Gross Sales	
			Respondents	West/Sou thwest	East/Midwest	South/So utheast	Under \$20,000	\$20,000 or more
Number of finance options offered	Mean		2.5	2.3	3.1	1.9	1.8	2.7

2009 Lawn & Landscape State of the Industry Survey

Q22. Equipment, materials, and other products purchased in last 12 months?

			Total	Region			2009 Gross Sales	
			Respondents	West/Sou thwest	East/Midwest	South/Sou theast	Under \$20,000	\$20,000 or more
Equipment - Purchased last 12 months	Riding mowers	Cases	212	41	101	69	89	118
		Col %	38.2%	29.9%	38.5%	47.3%	35.0%	40.8%
	Walk-behind mowers	Cases	187	62	83	42	71	112
		Col %	33.7%	45.3%	31.7%	28.8%	28.0%	38.8%
	Skid-steer loaders	Cases	65	19	35	11	15	48
		Col %	11.7%	13.9%	13.4%	7.5%	5.9%	16.6%
	Skid-steer attachments	Cases	69	17	39	13	15	51
		Col %	12.4%	12.4%	14.9%	8.9%	5.9%	17.6%
	Mini skid steers	Cases	31	8	15	8	3	28
		Col %	5.6%	5.8%	5.7%	5.5%	1.2%	9.7%
	Excavators	Cases	24	8	10	6	9	15
		Col %	4.3%	5.8%	3.8%	4.1%	3.5%	5.2%
	Chippers/grinders	Cases	45	9	22	13	15	28
		Col %	8.1%	6.6%	8.4%	8.9%	5.9%	9.7%
	Sprayers	Cases	206	56	78	70	90	115
		Col %	37.1%	40.9%	29.8%	47.9%	35.4%	39.8%
	Spreaders	Cases	178	50	75	52	58	118
		Col %	32.1%	36.5%	28.6%	35.6%	22.8%	40.8%
	Aerators	Cases	83	10	42	30	26	57
		Col %	15.0%	7.3%	16.0%	20.5%	10.2%	19.7%
	Hydroseeders	Cases	7	3	3	1	1	6
		Col %	1.3%	2.2%	1.1%	.7%	.4%	2.1%
	Trenchers	Cases	22	7	7	6	3	17
		Col %	4.0%	5.1%	2.7%	4.1%	1.2%	5.9%
	Trucks	Cases	217	58	95	62	56	159
		Col %	39.1%	42.3%	36.3%	42.5%	22.0%	55.0%
	Trailers	Cases	158	44	74	39	55	100
		Col %	28.5%	32.1%	28.2%	26.7%	21.7%	34.6%
	Backpack/hand-held blowers	Cases	271	67	122	81	90	175
		Col %	48.8%	48.9%	46.6%	55.5%	35.4%	60.6%
	Walk-behind blowers	Cases	65	11	35	19	34	31
		Col %	11.7%	8.0%	13.4%	13.0%	13.4%	10.7%
	Trimmers/edgers	Cases	270	68	123	78	107	156
		Col %	48.6%	49.6%	46.9%	53.4%	42.1%	54.0%
	Engines	Cases	97	30	47	20	15	80
		Col %	17.5%	21.9%	17.9%	13.7%	5.9%	27.7%
	Chainsaws	Cases	170	56	77	37	61	107
		Col %	30.6%	40.9%	29.4%	25.3%	24.0%	37.0%
	Landscape tools	Cases	404	106	187	110	168	229
		Col %	72.8%	77.4%	71.4%	75.3%	66.1%	79.2%
	Equipment parts	Cases	395	99	185	109	152	236
		Col %	71.2%	72.3%	70.6%	74.7%	59.8%	81.7%
	Total	Cases	555	137	262	146	254	289
		Col %	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

2009 Lawn & Landscape State of the Industry Survey

Q22. Equipment, materials, and other products purchased in last 12 months?

			Total	Region			2009 Gross Sales	
			Respondents	West/Southeast	East/Midwest	South/Southeast	Under \$20,000	\$20,000 or more
Landscape Materials - Purchased last 12 months	Bed edging	Cases	267	73	129	63	89	174
		Col %	48.1%	53.3%	49.2%	43.2%	35.0%	60.2%
	Trees/shrubs/plants	Cases	417	116	194	104	172	240
		Col %	75.1%	84.7%	74.0%	71.2%	67.7%	83.0%
	Sod	Cases	336	99	149	86	110	219
		Col %	60.5%	72.3%	56.9%	58.9%	43.3%	75.8%
	Turf seed	Cases	357	87	180	87	128	225
		Col %	64.3%	63.5%	68.7%	59.6%	50.4%	77.9%
	Retaining walls	Cases	267	61	141	61	87	176
		Col %	48.1%	44.5%	53.8%	41.8%	34.3%	60.9%
	Paver/patio products	Cases	271	70	139	60	85	184
		Col %	48.8%	51.1%	53.1%	41.1%	33.5%	63.7%
	Annuals/perennials	Cases	389	107	176	101	157	227
		Col %	70.1%	78.1%	67.2%	69.2%	61.8%	78.5%
	Water features	Cases	176	57	84	32	40	136
		Col %	31.7%	41.6%	32.1%	21.9%	15.7%	47.1%
	Landscape lighting	Cases	215	64	95	53	60	152
		Col %	38.7%	46.7%	36.3%	36.3%	23.6%	52.6%
	Holiday lighting	Cases	70	24	31	14	15	55
		Col %	12.6%	17.5%	11.8%	9.6%	5.9%	19.0%
Total	Cases	555	137	262	146	254	289	
	Col %	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	

2009 Lawn & Landscape State of the Industry Survey

Q22. Equipment, materials, and other products purchased in last 12 months?

			Total	Region			2009 Gross Sales	
			Respondents	West/Sou thwest	East/Midwest	South/So utheast	Under \$20,000	\$20,000 or more
Irrigation - Purchased last 12 months	Irrigation spray heads/rotors	Cases	291	102	99	83	93	191
		Col %	52.4%	74.5%	37.8%	56.8%	36.6%	66.1%
	Irrigation controllers	Cases	232	86	80	57	63	164
		Col %	41.8%	62.8%	30.5%	39.0%	24.8%	56.7%
	Irrigation valves	Cases	242	91	84	60	72	165
		Col %	43.6%	66.4%	32.1%	41.1%	28.3%	57.1%
	Drip irrigation products/materials	Cases	212	87	70	49	57	148
		Col %	38.2%	63.5%	26.7%	33.6%	22.4%	51.2%
	Soil moisture sensors	Cases	59	18	27	13	7	51
		Col %	10.6%	13.1%	10.3%	8.9%	2.8%	17.6%
	Rain sensors	Cases	160	47	66	42	37	116
		Col %	28.8%	34.3%	25.2%	28.8%	14.6%	40.1%
	Two-wire irrigation materials	Cases	95	37	35	23	20	74
		Col %	17.1%	27.0%	13.4%	15.8%	7.9%	25.6%
	ET systems	Cases	69	28	29	9	5	61
		Col %	12.4%	20.4%	11.1%	6.2%	2.0%	21.1%
	Total	Cases	555	137	262	146	254	289
		Col %	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

2009 Lawn & Landscape State of the Industry Survey

Q22. Equipment, materials, and other products purchased in last 12 months?

			Total	Region			2009 Gross Sales	
			Respondents	West/Southwest	East/Midwest	South/Southeast	Under \$20,000	\$20,000 or more
Chemical Products - Purchased last 12 months	Preemergent herbicides	Cases	323	80	145	92	109	210
		Col %	58.2%	58.4%	55.3%	63.0%	42.9%	72.7%
	Postemergent herbicides	Cases	318	85	133	94	109	206
		Col %	57.3%	62.0%	50.8%	64.4%	42.9%	71.3%
	Non-selective herbicides	Cases	290	69	123	91	94	192
		Col %	52.3%	50.4%	46.9%	62.3%	37.0%	66.4%
	Insecticides	Cases	267	61	118	85	82	184
		Col %	48.1%	44.5%	45.0%	58.2%	32.3%	63.7%
	Fungicides	Cases	226	54	99	71	58	167
		Col %	40.7%	39.4%	37.8%	48.6%	22.8%	57.8%
	Fertilizers	Cases	393	103	173	111	163	226
		Col %	70.8%	75.2%	66.0%	76.0%	64.2%	78.2%
	Fertilizer/pesticide combo products	Cases	251	55	121	73	86	164
		Col %	45.2%	40.1%	46.2%	50.0%	33.9%	56.7%
	Plant growth regulators	Cases	104	25	42	37	23	79
		Col %	18.7%	18.2%	16.0%	25.3%	9.1%	27.3%
	Perimeter pest control products	Cases	102	27	43	32	27	75
		Col %	18.4%	19.7%	16.4%	21.9%	10.6%	26.0%
	Tree care products	Cases	93	27	39	27	24	69
		Col %	16.8%	19.7%	14.9%	18.5%	9.4%	23.9%
Organic fertilizers	Cases	157	49	67	39	39	117	
	Col %	28.3%	35.8%	25.6%	26.7%	15.4%	40.5%	
Biologicals	Cases	54	24	22	8	14	40	
	Col %	9.7%	17.5%	8.4%	5.5%	5.5%	13.8%	
Total	Cases	555	137	262	146	254	289	
	Col %	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	

2009 Lawn & Landscape State of the Industry Survey

Q22. Equipment, materials, and other products purchased in last 12 months?

			Total	Region			2009 Gross Sales	
			Respondents	West/Sou thwest	East/Midwest	South/Sou theast	Under \$20,000	\$20,000 or more
Snow & Ice Products - Purchased last 12 months	Snowplows	Cases	85	9	73	2	22	63
		Col %	15.3%	6.6%	27.9%	1.4%	8.7%	21.8%
	Snow throwers	Cases	75	15	59	1	24	51
		Col %	13.5%	10.9%	22.5%	.7%	9.4%	17.6%
	Salt/deicing	Cases	178	30	135	13	60	115
		Col %	32.1%	21.9%	51.5%	8.9%	23.6%	39.8%
	Salt spreaders	Cases	101	17	79	5	32	67
		Col %	18.2%	12.4%	30.2%	3.4%	12.6%	23.2%
	Total	Cases	555	137	262	146	254	289
		Col %	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

2009 Lawn & Landscape State of the Industry Survey

Q22. Equipment, materials, and other products purchased in last 12 months?

			Total	Region			2009 Gross Sales	
			Respondents	West/Sou thwest	East/Midwest	South/Sou theast	Under \$20,000	\$20,000 or more
Miscellaneous - Purchased last 12 months	Safety equipment	Cases	365	87	175	100	137	222
		Col %	65.8%	63.5%	66.8%	68.5%	53.9%	76.8%
	Uniforms	Cases	280	55	134	87	84	190
		Col %	50.5%	40.1%	51.1%	59.6%	33.1%	65.7%
	Computers	Cases	239	61	120	55	84	153
		Col %	43.1%	44.5%	45.8%	37.7%	33.1%	52.9%
	Business software	Cases	219	65	91	60	74	141
		Col %	39.5%	47.4%	34.7%	41.1%	29.1%	48.8%
	Design software	Cases	83	27	35	21	27	56
		Col %	15.0%	19.7%	13.4%	14.4%	10.6%	19.4%
	GPS systems/software	Cases	147	33	66	44	59	88
		Col %	26.5%	24.1%	25.2%	30.1%	23.2%	30.4%
	Consultants	Cases	66	16	33	14	15	50
		Col %	11.9%	11.7%	12.6%	9.6%	5.9%	17.3%
	Subcontracted services	Cases	244	69	115	57	82	158
		Col %	44.0%	50.4%	43.9%	39.0%	32.3%	54.7%
	Total	Cases	555	137	262	146	254	289
		Col %	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

2009 Lawn & Landscape State of the Industry Survey

Q22. Equipment, materials, and other products planned for purchase in next 12 months?

			Total	Region			2009 Gross Sales	
			Respondents	West/Southeast	East/Midwest	South/Southeast	Under \$20,000	\$20,000 or more
Equipment - Planned for purchase	Riding mowers	Cases	185	41	85	56	85	98
		Col %	36.4%	32.5%	34.8%	42.7%	37.3%	36.2%
	Walk-behind mowers	Cases	143	33	69	41	65	78
		Col %	28.1%	26.2%	28.3%	31.3%	28.5%	28.8%
	Skid-steer loaders	Cases	43	8	28	7	15	28
		Col %	8.5%	6.3%	11.5%	5.3%	6.6%	10.3%
	Skid-steer attachments	Cases	59	11	33	15	24	35
		Col %	11.6%	8.7%	13.5%	11.5%	10.5%	12.9%
	Mini skid steers	Cases	39	8	21	10	15	24
		Col %	7.7%	6.3%	8.6%	7.6%	6.6%	8.9%
	Excavators	Cases	20	3	10	7	7	13
		Col %	3.9%	2.4%	4.1%	5.3%	3.1%	4.8%
	Chippers/grinders	Cases	30	11	10	9	17	13
		Col %	5.9%	8.7%	4.1%	6.9%	7.5%	4.8%
	Sprayers	Cases	129	35	40	53	48	81
		Col %	25.4%	27.8%	16.4%	40.5%	21.1%	29.9%
	Spreaders	Cases	108	24	38	46	39	69
		Col %	21.3%	19.0%	15.6%	35.1%	17.1%	25.5%
	Aerators	Cases	78	20	32	26	34	44
		Col %	15.4%	15.9%	13.1%	19.8%	14.9%	16.2%
	Hydroseeders	Cases	27	6	14	5	11	16
		Col %	5.3%	4.8%	5.7%	3.8%	4.8%	5.9%
	Trenchers	Cases	32	10	14	8	13	19
		Col %	6.3%	7.9%	5.7%	6.1%	5.7%	7.0%
	Trucks	Cases	214	49	118	44	74	135
		Col %	42.1%	38.9%	48.4%	33.6%	32.5%	49.8%
	Trailers	Cases	161	36	77	46	80	78
		Col %	31.7%	28.6%	31.6%	35.1%	35.1%	28.8%
	Backpack/hand-held blowers	Cases	212	42	101	67	80	129
		Col %	41.7%	33.3%	41.4%	51.1%	35.1%	47.6%
	Walk-behind blowers	Cases	44	6	21	17	15	29
		Col %	8.7%	4.8%	8.6%	13.0%	6.6%	10.7%
	Trimmers/edgers	Cases	205	44	93	67	79	122
		Col %	40.4%	34.9%	38.1%	51.1%	34.6%	45.0%
	Engines	Cases	63	19	35	9	10	53
		Col %	12.4%	15.1%	14.3%	6.9%	4.4%	19.6%
	Chainsaws	Cases	107	34	44	29	42	65
		Col %	21.1%	27.0%	18.0%	22.1%	18.4%	24.0%
	Landscape tools	Cases	318	79	145	92	127	186
		Col %	62.6%	62.7%	59.4%	70.2%	55.7%	68.6%
	Equipment parts	Cases	320	78	147	92	124	191
		Col %	63.0%	61.9%	60.2%	70.2%	54.4%	70.5%
Total		Cases	508	126	244	131	228	271
		Col %	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

2009 Lawn & Landscape State of the Industry Survey

Q22. Equipment, materials, and other products planned for purchase in next 12 months?

			Total	Region			2009 Gross Sales	
			Respondents	West/Sou thwest	East/Midwest	South/So utheast	Under \$20,000	\$20,000 or more
Landscape Materials - Planned for purchase	Bed edging	Cases	234	65	118	49	82	150
		Col %	46.1%	51.6%	48.4%	37.4%	36.0%	55.4%
	Trees/shrubs/plants	Cases	363	98	170	92	142	217
		Col %	71.5%	77.8%	69.7%	70.2%	62.3%	80.1%
	Sod	Cases	290	87	128	73	96	189
		Col %	57.1%	69.0%	52.5%	55.7%	42.1%	69.7%
	Turf seed	Cases	309	77	155	74	105	200
		Col %	60.8%	61.1%	63.5%	56.5%	46.1%	73.8%
	Retaining walls	Cases	227	55	121	49	71	154
		Col %	44.7%	43.7%	49.6%	37.4%	31.1%	56.8%
	Paver/patio products	Cases	248	62	129	55	82	164
		Col %	48.8%	49.2%	52.9%	42.0%	36.0%	60.5%
	Annuals/perennials	Cases	335	94	155	83	130	203
		Col %	65.9%	74.6%	63.5%	63.4%	57.0%	74.9%
	Water features	Cases	184	57	91	33	55	128
		Col %	36.2%	45.2%	37.3%	25.2%	24.1%	47.2%
	Landscape lighting	Cases	212	68	95	46	72	139
		Col %	41.7%	54.0%	38.9%	35.1%	31.6%	51.3%
	Holiday lighting	Cases	97	35	49	10	31	66
		Col %	19.1%	27.8%	20.1%	7.6%	13.6%	24.4%
Total		Cases	508	126	244	131	228	271
		Col %	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

2009 Lawn & Landscape State of the Industry Survey

Q22. Equipment, materials, and other products planned for purchase in next 12 months?

			Total	Region			2009 Gross Sales	
			Respondents	West/Sou thwest	East/Midwest	South/So utheast	Under \$20,000	\$20,000 or more
Irrigation - Planned for purchase	Irrigation spray heads/rotors	Cases	252	90	95	62	82	164
		Col %	49.6%	71.4%	38.9%	47.3%	36.0%	60.5%
	Irrigation controllers	Cases	213	79	81	48	63	147
		Col %	41.9%	62.7%	33.2%	36.6%	27.6%	54.2%
	Irrigation valves	Cases	218	82	83	48	67	147
		Col %	42.9%	65.1%	34.0%	36.6%	29.4%	54.2%
	Drip irrigation products/materials	Cases	210	80	77	48	66	139
		Col %	41.3%	63.5%	31.6%	36.6%	28.9%	51.3%
	Soil moisture sensors	Cases	85	30	37	17	19	65
		Col %	16.7%	23.8%	15.2%	13.0%	8.3%	24.0%
	Rain sensors	Cases	148	49	63	33	40	103
		Col %	29.1%	38.9%	25.8%	25.2%	17.5%	38.0%
	Two-wire irrigation materials	Cases	113	43	44	23	32	80
		Col %	22.2%	34.1%	18.0%	17.6%	14.0%	29.5%
	ET systems	Cases	89	37	34	16	12	74
		Col %	17.5%	29.4%	13.9%	12.2%	5.3%	27.3%
	Total	Cases	508	126	244	131	228	271
		Col %	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

2009 Lawn & Landscape State of the Industry Survey

Q22. Equipment, materials, and other products planned for purchase in next 12 months?

			Total	Region			2009 Gross Sales	
			Respondents	West/Sou thwest	East/Midwest	South/Sou theast	Under \$20,000	\$20,000 or more
Chemical Products - Planned for purchase	Preemergent herbicides	Cases	292	75	136	78	101	188
		Col %	57.5%	59.5%	55.7%	59.5%	44.3%	69.4%
	Postemergent herbicides	Cases	281	77	123	80	99	180
		Col %	55.3%	61.1%	50.4%	61.1%	43.4%	66.4%
	Non-selective herbicides	Cases	253	60	115	75	78	173
		Col %	49.8%	47.6%	47.1%	57.3%	34.2%	63.8%
	Insecticides	Cases	233	56	107	67	67	166
		Col %	45.9%	44.4%	43.9%	51.1%	29.4%	61.3%
	Fungicides	Cases	208	53	95	58	60	148
		Col %	40.9%	42.1%	38.9%	44.3%	26.3%	54.6%
	Fertilizers	Cases	351	95	162	91	146	202
		Col %	69.1%	75.4%	66.4%	69.5%	64.0%	74.5%
	Fertilizer/pesticide combo products	Cases	223	53	109	59	80	143
		Col %	43.9%	42.1%	44.7%	45.0%	35.1%	52.8%
	Plant growth regulators	Cases	116	32	46	36	29	85
		Col %	22.8%	25.4%	18.9%	27.5%	12.7%	31.4%
	Perimeter pest control products	Cases	97	23	49	25	23	74
		Col %	19.1%	18.3%	20.1%	19.1%	10.1%	27.3%
	Tree care products	Cases	94	27	42	25	22	72
		Col %	18.5%	21.4%	17.2%	19.1%	9.6%	26.6%
Organic fertilizers	Cases	150	48	68	31	40	109	
	Col %	29.5%	38.1%	27.9%	23.7%	17.5%	40.2%	
Biologicals	Cases	57	22	27	6	17	40	
	Col %	11.2%	17.5%	11.1%	4.6%	7.5%	14.8%	
Total	Cases	508	126	244	131	228	271	
	Col %	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	

2009 Lawn & Landscape State of the Industry Survey

Q22. Equipment, materials, and other products planned for purchase in next 12 months?

			Total	Region			2009 Gross Sales	
			Respondents	West/Sou thwest	East/Midwest	South/So utheast	Under \$20,000	\$20,000 or more
Snow & Ice Products - Planned for purchase	Snowplows	Cases	107	20	83	1	37	69
		Col %	21.1%	15.9%	34.0%	.8%	16.2%	25.5%
	Snow throwers	Cases	72	17	50	2	23	48
		Col %	14.2%	13.5%	20.5%	1.5%	10.1%	17.7%
	Salt/deicing	Cases	165	31	122	10	53	111
		Col %	32.5%	24.6%	50.0%	7.6%	23.2%	41.0%
	Salt spreaders	Cases	112	20	87	3	34	77
		Col %	22.0%	15.9%	35.7%	2.3%	14.9%	28.4%
	Total	Cases	508	126	244	131	228	271
		Col %	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

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Q22. Equipment, materials, and other products planned for purchase in next 12 months?

			Total	Region			2009 Gross Sales	
			Respondents	West/Southeast	East/Midwest	South/Southeast	Under \$20,000	\$20,000 or more
Miscellaneous - Planned for purchase	Safety equipment	Cases	305	79	148	75	112	187
		Col %	60.0%	62.7%	60.7%	57.3%	49.1%	69.0%
	Uniforms	Cases	260	63	120	74	91	163
		Col %	51.2%	50.0%	49.2%	56.5%	39.9%	60.1%
	Computers	Cases	181	46	86	48	68	111
		Col %	35.6%	36.5%	35.2%	36.6%	29.8%	41.0%
	Business software	Cases	173	44	79	48	71	99
		Col %	34.1%	34.9%	32.4%	36.6%	31.1%	36.5%
	Design software	Cases	89	23	37	27	52	37
		Col %	17.5%	18.3%	15.2%	20.6%	22.8%	13.7%
	GPS systems/software	Cases	109	33	44	29	42	67
		Col %	21.5%	26.2%	18.0%	22.1%	18.4%	24.7%
	Consultants	Cases	75	22	39	13	20	54
		Col %	14.8%	17.5%	16.0%	9.9%	8.8%	19.9%
	Subcontracted services	Cases	238	70	119	48	86	149
		Col %	46.9%	55.6%	48.8%	36.6%	37.7%	55.0%
	Total	Cases	508	126	244	131	228	271
		Col %	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

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Q23. Average annual expenditure for the following products and services

		Total	Region			2009 Gross Sales	
		Respondents	West/Sou thwest	East/Midwest	South/So utheast	Under \$20,000	\$20,000 or more
Riding mowers	Mean	\$13,126	\$16,389	\$13,382	\$10,650	\$9,907	\$15,859
Walk-behind mowers	Mean	\$6,246	\$5,806	\$6,602	\$6,375	\$3,898	\$7,992
Skid-steers/loaders	Mean	\$31,266	\$38,867	\$32,840	\$25,107	\$17,493	\$35,263
Skid-steer attachments	Mean	\$6,695	\$7,889	\$7,277	\$4,592	\$3,450	\$7,733
Mini skid-steers	Mean	\$13,332	\$16,150	\$12,038	\$12,500	\$7,083	\$14,718
Excavators	Mean	\$18,905	\$40,050	\$18,589	\$4,767	\$5,700	\$24,072
Chippers/grinders	Mean	\$8,245	\$4,434	\$15,103	\$1,895	\$4,158	\$10,581
Sprayers	Mean	\$2,235	\$1,191	\$2,916	\$2,178	\$407	\$3,897
Spreaders	Mean	\$1,412	\$614	\$1,439	\$2,082	\$530	\$1,946
Aerators	Mean	\$2,310	\$780	\$2,204	\$3,226	\$1,138	\$3,099
Hydroseeders	Mean	\$6,286	\$0	\$12,571	\$0	\$0	\$7,333
Trenchers	Mean	\$4,241	\$2,797	\$5,000	\$1,250	\$500	\$3,877
Trucks	Mean	\$39,727	\$42,676	\$44,451	\$30,222	\$15,922	\$48,614
Trailers	Mean	\$5,892	\$5,263	\$6,996	\$5,027	\$3,738	\$7,152
Backpack/hand-held blowers	Mean	\$1,192	\$1,392	\$1,051	\$1,238	\$542	\$1,616
Walk-behind blowers	Mean	\$1,540	\$1,400	\$1,416	\$1,881	\$889	\$2,135
Trimmers/edgers	Mean	\$884	\$1,043	\$806	\$860	\$498	\$1,186
Engines	Mean	\$2,351	\$2,180	\$2,094	\$3,623	\$947	\$2,727
Chainsaws	Mean	\$536	\$615	\$533	\$445	\$467	\$583
Landscape tools	Mean	\$1,261	\$1,684	\$1,330	\$816	\$404	\$1,967
Equipment parts	Mean	\$4,233	\$3,516	\$4,286	\$4,871	\$1,173	\$6,394
Equipment rentals	Mean	\$4,668	\$9,379	\$2,563	\$2,798	\$1,795	\$6,702

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Q23. Average annual expenditure for the following products and services

		Total	Region			2009 Gross Sales	
		Respondents	West/Sou thwest	East/Midwest	South/So utheast	Under \$20,000	\$20,000 or more
Bed edging	Mean	\$2,023	\$3,013	\$1,421	\$2,161	\$997	\$2,676
Trees/shrubs/plants	Mean	\$38,792	\$46,413	\$30,174	\$47,173	\$4,615	\$64,762
Sod	Mean	\$14,488	\$22,566	\$4,822	\$20,316	\$3,070	\$20,098
Turf seed	Mean	\$4,380	\$8,280	\$2,098	\$5,591	\$879	\$6,424
Landscape lighting	Mean	\$4,888	\$5,335	\$4,523	\$5,300	\$3,332	\$5,589
Retaining walls	Mean	\$16,048	\$23,979	\$14,951	\$11,762	\$5,981	\$21,621
Paver/patio products	Mean	\$18,950	\$28,683	\$16,144	\$13,799	\$3,864	\$26,921
Annuals/perennials	Mean	\$8,174	\$11,557	\$7,492	\$5,714	\$2,504	\$12,154
Water features	Mean	\$8,597	\$10,971	\$7,789	\$6,960	\$3,959	\$9,857
Holiday lighting	Mean	\$1,946	\$1,676	\$2,136	\$1,933	\$1,333	\$2,121

Q23. Average annual expenditure for the following products and services

		Total	Region			2009 Gross Sales	
		Respondents	West/Sou thwest	East/Midwest	South/So utheast	Under \$20,000	\$20,000 or more
Irrigation spray heads/rotors	Mean	\$7,483	\$11,748	\$6,005	\$4,069	\$654	\$11,541
Irrigation controllers	Mean	\$5,087	\$3,847	\$3,535	\$8,741	\$725	\$6,989
Irrigation valves	Mean	\$3,097	\$4,161	\$2,581	\$2,336	\$495	\$4,344
Drip irrigation products/materials	Mean	\$3,726	\$4,349	\$3,574	\$2,819	\$504	\$4,914
Soil moisture sensors	Mean	\$834	\$161	\$1,503	\$317	\$125	\$1,036
Rain sensors	Mean	\$986	\$1,382	\$1,095	\$464	\$205	\$1,236
Two-wire irrigation materials	Mean	\$3,401	\$4,543	\$2,394	\$3,005	\$255	\$4,224
ET systems	Mean	\$2,651	\$4,628	\$1,496	\$1,714	\$521	\$3,108

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Q23. Average annual expenditure for the following products and services

		Total	Region			2009 Gross Sales	
		Respondents	West/Sou thwest	East/Midwest	South/Sou theast	Under \$20,000	\$20,000 or more
Preemergent herbicides	Mean	\$3,974	\$4,811	\$2,397	\$6,107	\$763	\$6,025
Postemergent herbicides	Mean	\$3,652	\$5,343	\$2,319	\$4,608	\$859	\$5,274
Non-selective herbicides	Mean	\$1,509	\$2,069	\$985	\$1,935	\$348	\$2,222
Insecticides	Mean	\$2,551	\$2,312	\$2,385	\$3,041	\$1,121	\$3,167
Fungicides	Mean	\$1,523	\$1,667	\$709	\$2,624	\$237	\$2,051
Fertilizers	Mean	\$9,841	\$8,338	\$8,874	\$12,853	\$2,256	\$15,682
Fertilizer/pesticide combo products	Mean	\$4,248	\$4,203	\$4,744	\$3,486	\$1,275	\$5,778
Plant growth regulators	Mean	\$792	\$999	\$981	\$476	\$169	\$1,017
Perimeter pest control products	Mean	\$1,282	\$1,729	\$672	\$2,071	\$175	\$1,595
Tree care products	Mean	\$1,320	\$667	\$515	\$3,241	\$201	\$1,880
Organic fertilizers	Mean	\$3,390	\$971	\$3,491	\$6,383	\$5,015	\$2,822
Biologicals	Mean	\$364	\$269	\$388	\$456	\$215	\$414

Q23. Average annual expenditure for the following products and services

		Total	Region			2009 Gross Sales	
		Respondents	West/Sou thwest	East/Midwest	South/Sou theast	Under \$20,000	\$20,000 or more
Snowplows	Mean	\$6,168	\$4,185	\$7,107	\$917	\$3,227	\$7,283
Snow throwers	Mean	\$1,341	\$853	\$1,667	\$0	\$808	\$1,572
Salt/deicing products	Mean	\$11,766	\$8,567	\$14,054	\$1,123	\$1,793	\$16,984
Salt spreaders	Mean	\$2,906	\$2,265	\$3,410	\$538	\$1,249	\$3,633

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Q23. Average annual expenditure for the following products and services

		Total	Region			2009 Gross Sales	
		Respondents	West/Sou thwest	East/Midwest	South/Sou theast	Under \$20,000	\$20,000 or more
Safety equipment	Mean	\$978	\$1,598	\$771	\$800	\$231	\$1,496
Uniforms	Mean	\$1,858	\$2,319	\$1,319	\$2,415	\$363	\$2,688
Computers	Mean	\$1,945	\$2,379	\$1,637	\$2,210	\$1,191	\$2,463
Business software	Mean	\$1,489	\$879	\$2,419	\$667	\$426	\$2,134
Design software	Mean	\$1,174	\$592	\$1,623	\$1,105	\$816	\$1,449
GPS systems/software	Mean	\$1,512	\$516	\$416	\$4,148	\$229	\$2,239
Consultants	Mean	\$3,791	\$953	\$5,436	\$2,860	\$712	\$4,767
Subcontracted services	Mean	\$31,922	\$28,811	\$26,106	\$45,755	\$5,444	\$45,217

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Q24. How would you characterize your equipment budgets in 2009?

			Total	Region			2009 Gross Sales	
			Respondents	West/Southwest	East/Midwest	South/Southeast	Under \$20,000	\$20,000 or more
Equipment budgets in 2009	Significantly increased over 2008	Count	80	23	38	18	36	44
		Col %	14.1%	16.5%	14.2%	11.8%	13.7%	15.0%
	Increased slightly	Count	171	44	66	57	81	83
		Col %	30.1%	31.7%	24.7%	37.3%	30.9%	28.2%
	Did not change	Count	123	21	63	39	70	52
		Col %	21.6%	15.1%	23.6%	25.5%	26.7%	17.7%
	Decreased slightly	Count	91	17	51	21	42	48
		Col %	16.0%	12.2%	19.1%	13.7%	16.0%	16.3%
Significantly decreased from 2008	Count	104	34	49	18	33	67	
	Col %	18.3%	24.5%	18.4%	11.8%	12.6%	22.8%	
Total	Count	569	139	267	153	262	294	
	Col %	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	

Q24b. How would you project your equipment budgets to be in 2010?

			Total	Region			2009 Gross Sales	
			Respondents	West/Southwest	East/Midwest	South/Southeast	Under \$20,000	\$20,000 or more
Equipment budgets projection for 2010	Significantly increased over 2008	Count	74	17	34	23	45	29
		Col %	13.0%	12.4%	12.6%	15.0%	17.0%	9.9%
	Increased slightly	Count	279	57	131	85	132	138
		Col %	49.0%	41.6%	48.7%	55.6%	50.0%	47.3%
	Did not change	Count	126	35	62	27	57	66
		Col %	22.1%	25.5%	23.0%	17.6%	21.6%	22.6%
	Decreased slightly	Count	59	16	30	11	17	42
		Col %	10.4%	11.7%	11.2%	7.2%	6.4%	14.4%
Significantly decreased from 2008	Count	31	12	12	7	13	17	
	Col %	5.4%	8.8%	4.5%	4.6%	4.9%	5.8%	
Total	Count	569	137	269	153	264	292	
	Col %	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	

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Q25a. In today's economy, what do you expect from your equipment suppliers/dealers/distributors?

			Total	Region			2009 Gross Sales	
			Respondents	West/Southwest	East/Midwest	South/Southeast	Under \$20,000	\$20,000 or more
Expectations	Stretch/be more lenient on financial terms	Cases	226	54	113	55	91	135
		Col %	41.1%	40.0%	44.1%	36.4%	35.5%	47.4%
	Offer discounts	Cases	389	92	179	114	187	196
		Col %	70.7%	68.1%	69.9%	75.5%	73.0%	68.8%
	Increase support	Cases	212	54	91	65	97	110
		Col %	38.5%	40.0%	35.5%	43.0%	37.9%	38.6%
	Provide a higher level of service compared to other	Cases	259	59	128	70	102	154
		Col %	47.1%	43.7%	50.0%	46.4%	39.8%	54.0%
	Offer more and faster service options on equipment	Cases	251	51	118	80	110	137
		Col %	45.6%	37.8%	46.1%	53.0%	43.0%	48.1%
	Other	Cases	15	2	5	8	10	5
		Col %	2.7%	1.5%	2.0%	5.3%	3.9%	1.8%
Total		Cases	550	135	256	151	256	285
		Col %	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Q25b. In today's economy, how long are you holding on to equipment vs two years ago?

			Total	Region			2009 Gross Sales	
			Respondents	West/Southwest	East/Midwest	South/Southeast	Under \$20,000	\$20,000 or more
Equipment held	Longer than usual	Cases	387	93	174	113	189	191
		Col %	70.2%	67.9%	67.7%	75.8%	75.3%	65.9%
	Replacing our equipment as often as we usually do	Cases	159	42	81	35	60	96
		Col %	28.9%	30.7%	31.5%	23.5%	23.9%	33.1%
	Replacing our equipment more frequently	Cases	9	2	5	2	2	7
		Col %	1.6%	1.5%	1.9%	1.3%	.8%	2.4%
Total		Cases	551	137	257	149	251	290
		Col %	100.7%	100.0%	101.2%	100.7%	100.0%	101.4%

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Q26. What marketing methods do you use to obtain new business?

			Total	Region			2009 Gross Sales	
			Respondents	West/Sou thwest	East/Midwest	South/Sou theast	Under \$20,000	\$20,000 or more
Marketing methods used	Customer referrals	Cases	548	136	259	145	253	285
		Col %	92.9%	93.2%	94.9%	91.2%	93.4%	95.0%
	Business associate referrals	Cases	356	88	173	90	145	204
		Col %	60.3%	60.3%	63.4%	56.6%	53.5%	68.0%
	Company website/emails	Cases	270	66	132	70	90	176
		Col %	45.8%	45.2%	48.4%	44.0%	33.2%	58.7%
	Internet referral service	Cases	123	34	47	40	36	87
		Col %	20.8%	23.3%	17.2%	25.2%	13.3%	29.0%
	Newspaper ads	Cases	123	21	65	35	56	63
		Col %	20.8%	14.4%	23.8%	22.0%	20.7%	21.0%
	Yellow page ads	Cases	216	54	99	59	84	127
		Col %	36.6%	37.0%	36.3%	37.1%	31.0%	42.3%
	Television ads	Cases	21	6	12	3	5	16
		Col %	3.6%	4.1%	4.4%	1.9%	1.8%	5.3%
	Radio ads	Cases	36	9	21	6	9	27
		Col %	6.1%	6.2%	7.7%	3.8%	3.3%	9.0%
	Telemarketing	Cases	16	5	5	6	5	11
		Col %	2.7%	3.4%	1.8%	3.8%	1.8%	3.7%
	Direct mail	Cases	147	28	82	35	48	97
		Col %	24.9%	19.2%	30.0%	22.0%	17.7%	32.3%
	Public relations	Cases	129	30	62	32	48	80
		Col %	21.9%	20.5%	22.7%	20.1%	17.7%	26.7%
	Cold call sales/canvassing	Cases	120	26	58	36	41	77
		Col %	20.3%	17.8%	21.2%	22.6%	15.1%	25.7%
	Company retail store	Cases	13	1	11	1	1	12
		Col %	2.2%	.7%	4.0%	.6%	.4%	4.0%
	Home & garden shows	Cases	82	26	42	14	22	60
		Col %	13.9%	17.8%	15.4%	8.8%	8.1%	20.0%
	Door to door	Cases	110	24	45	39	54	55
		Col %	18.6%	16.4%	16.5%	24.5%	19.9%	18.3%
	Internet search	Cases	122	32	51	39	45	77
		Col %	20.7%	21.9%	18.7%	24.5%	16.6%	25.7%
	Yard signs	Cases	231	44	118	69	82	147
		Col %	39.2%	30.1%	43.2%	43.4%	30.3%	49.0%
	Other	Cases	29	8	13	8	13	16
		Col %	4.9%	5.5%	4.8%	5.0%	4.8%	5.3%
Total	Cases		590	146	273	159	271	300
	Col %		100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

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Q27a. What was the fastest growing service for your business in 2009?

			Total	Region			2009 Gross Sales	
			Respondents	West/Sou thwest	East/Midwest	South/Sou theast	Under \$20,000	\$20,000 or more
Fastest service in 2009	Design/build installation	Count	95	24	49	20	42	51
		Col %	18.0%	18.8%	19.8%	13.9%	17.1%	18.6%
	Mowing/maintenance	Count	224	51	90	78	119	101
		Col %	42.3%	39.8%	36.4%	54.2%	48.4%	36.9%
	Lawn care	Count	64	8	32	23	28	36
		Col %	12.1%	6.3%	13.0%	16.0%	11.4%	13.1%
	Irrigation	Count	43	18	13	10	16	25
		Col %	8.1%	14.1%	5.3%	6.9%	6.5%	9.1%
	Trees & ornamental	Count	18	8	9	1	7	11
		Col %	3.4%	6.3%	3.6%	.7%	2.8%	4.0%
	Snow removal	Count	35	3	32	0	16	19
		Col %	6.6%	2.3%	13.0%	.0%	6.5%	6.9%
	Waterscapes	Count	12	1	9	2	6	6
		Col %	2.3%	.8%	3.6%	1.4%	2.4%	2.2%
	Lighting	Count	6	2	3	1	0	6
		Col %	1.1%	1.6%	1.2%	.7%	.0%	2.2%
	Other	Count	32	13	10	9	12	19
		Col %	6.0%	10.2%	4.0%	6.3%	4.9%	6.9%
Total	Count	529	128	247	144	246	274	
	Col %	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	

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Q27b. What do you predict will be the fastest growing service in 2010?

			Total	Region			2009 Gross Sales	
			Respondents	West/Sou thwest	East/Midwest	South/So utheast	Under \$20,000	\$20,000 or more
Fastest service predicted for 2010	Design/build installation	Count	117	35	57	21	51	64
		Col %	22.2%	27.1%	23.3%	14.7%	21.1%	23.3%
	Mowing/maintenance	Count	197	40	87	67	98	94
		Col %	37.4%	31.0%	35.5%	46.9%	40.5%	34.2%
	Lawn care	Count	72	14	34	23	34	38
		Col %	13.7%	10.9%	13.9%	16.1%	14.0%	13.8%
	Irrigation	Count	45	19	16	8	24	19
		Col %	8.5%	14.7%	6.5%	5.6%	9.9%	6.9%
	Trees & ornamental	Count	17	5	8	4	6	11
		Col %	3.2%	3.9%	3.3%	2.8%	2.5%	4.0%
	Snow removal	Count	24	1	23	0	11	13
		Col %	4.6%	.8%	9.4%	.0%	4.5%	4.7%
	Waterscapes	Count	14	4	5	5	7	7
		Col %	2.7%	3.1%	2.0%	3.5%	2.9%	2.5%
	Lighting	Count	4	0	4	0	1	3
		Col %	.8%	.0%	1.6%	.0%	.4%	1.1%
	Other	Count	37	11	11	15	10	26
		Col %	7.0%	8.5%	4.5%	10.5%	4.1%	9.5%
Total	Count	527	129	245	143	242	275	
	Col %	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	