

A close-up photograph of a person's legs and hands as they shovel snow. The person is wearing dark winter pants, a green jacket, and brown work boots. They are holding a metal shovel with a black blade, which is filled with snow. The background is a bright, snowy landscape.

state of the snow labor market

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Lawn & Landscape

Plow through the problems

Today's snow and ice contractors are asked to do more —

to do it more quickly, efficiently and reliably than ever before — which is why, as we all navigate unprecedented supply chain pressures and labor shortages, our nearly 500 employees in Iron Mountain, Michigan, are working hard to deliver the products, technology and support you need today, while anticipating and planning for the demands of the future.

At BOSS, we're building innovative partnerships, advancing design and technology capabilities, and expanding our manufacturing facilities to deliver real solutions for tomorrow.

Thank you for the work you and your teams do to restore order.



Mark Klossner
VP, Director of Marketing,
Boss Products

Filling in the ranks

The professional snow and ice management community weighs in on the challenges associated with hiring and retaining key personnel heading into this winter.

The lack of available labor is an ongoing nation-wide dilemma that impacts nearly every state and industry to some degree. As businesses in both the landscape and snow industries, as well as their clients and customer base, continue to recover economically from

the COVID-19 pandemic, the crisis is one of numbers. There are simply more job vacancies than there are workers.

While the COVID vaccine roll-out did get people back to work, many business leaders and economists say it wasn't enough to fill available vacancies. In fact,



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a survey this spring conducted by the U.S. Chamber of Commerce (of the leaders of state and local chambers of commerce) found that more than 90% of respondents believed the “lack of available workers” was slowing the growth of their respective local economies. In addition, in a survey conducted by the chamber of top trade-association economists, 88% of those respondents felt it was “somewhat difficult” for businesses in their respective industries to hire and retain workers.

These broader claims and challenges mirror those being made by those in the snow and ice management industry. In Snow Magazine’s 2021 State of the Industry report, the majority of respondents identified attracting quality labor as some sort of immediate business challenge, with 59% of those respondents labeling the pressure either “significant” (43%) or “insurmountable” (16%). With regard to the challenges associated with retaining that labor, 85% identified it as an issue they were dealing with, while 35% deemed it a “significant” challenge and 16% saw it as “insurmountable.”

In fact, recent research indicates more than three quarters (81%) of snow professionals believe the current snow labor market is worse than it was prior to the COVID outbreak in March 2020, with nearly half (44%) labeling it “much worse.”

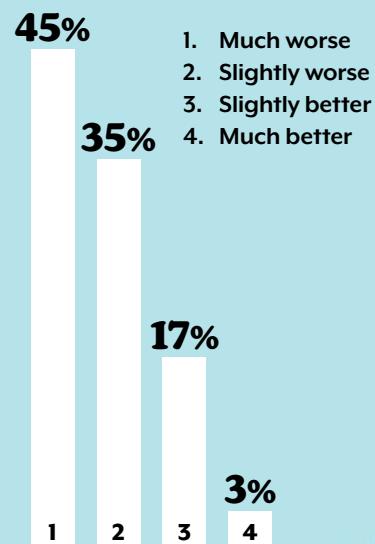
While many service-oriented businesses countered these labor-induced challenges by reducing hours or scaling back the scope of their operations, both landscape and snow and ice management have been deemed essential services. In particular, snow and ice management services are vital to keep the wheels of commerce rotating during the winter months. Likewise, their services are essential to maintaining safe pavement surfaces on not only retail and commercial spaces, but also medical and hospital facilities. Snow and ice professionals must answer the call when the snow falls.

Without a doubt, these are deep and

COVID’s Impact

RECENT RESEARCH conducted by Lawn & Landscape and Snow magazines indicates the ability to hire and retain over the last year and a half. Compared to before the COVID outbreak in March 2020, most snow and ice management professionals (80%) believe labor conditions are comparatively worse. Only 20 percent consider them better.

Compare to before when COVID-19 hit in March 2020, the snow labor market is now:



complex challenges for the professional snow and ice management industry. Lawn & Landscape and Snow magazines, along with partner BOSS Snowplow, wanted to dig a bit deeper into these issues to identify trends that could help alleviate the business pressures surrounding hiring and retention of seasonal personnel as we enter Winter 2021-22.

Beginning in late September, editors at Lawn & Landscape and Snow magazines developed a survey that was administered to professional snow and ice management contractors via the online research portal, SurveyMonkey. The data from that

research was reviewed and compiled to identify some key trends, specifically the depth of hiring challenges, the scope of contractors hiring practices, as well as the competitive challenges vying for labor within the snow and ice management community.

To provide added depth, comparisons were made on some key issues against the scope or size of operations based on billable snow and ice revenue of more-than and less-than \$500,000 representing a mid-sized to large-scale snow business vs less-than-mid-size to small-scale operation, respectively. ●



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Maximize on-the-job profitability and reduce labor costs.

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Hourly Snow Employees

— By the Numbers

While the largest percentage of research participants (37%) indicated they dedicate 15 or more employees to seasonal snow and ice management work, more than three quarters (78%) were still seeking to meet their winter staffing needs. And the majority of snow professionals (53%) were either unsure or not confident at all that they'd meet those staffing needs by Winter 2021-22's first billable event.

Using \$500,000 as a winter revenue benchmark, the data indicates — logically — that those billing the most for winter plowing and salting services also dedicated the most people, with 82% of contractors in that group employing 15 or more people for snow and ice management. This same group has more of a pressing need for workers, with the majority of respondents billing more than \$500,000 in winter revenue (48%) still requiring 11 or more winter workers.

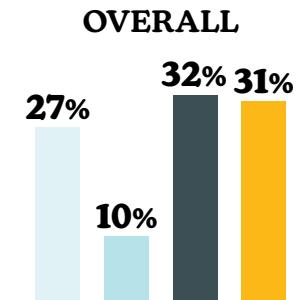
One interesting trend noted was that those contractors billing less than \$500,000 in winter snow and ice services had the highest percentage among respondents of those who didn't need to hire anyone (32%), as well as the highest level of confidence (53%) among those still hiring that they will meet their labor requirements by their first billable event. ●



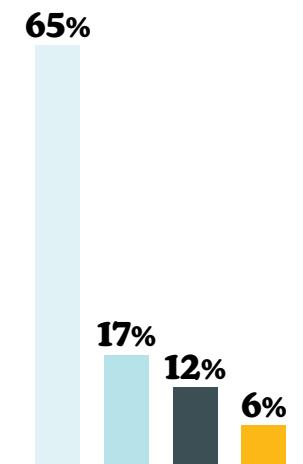
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Hourly Employees Dedicated to Winter Services

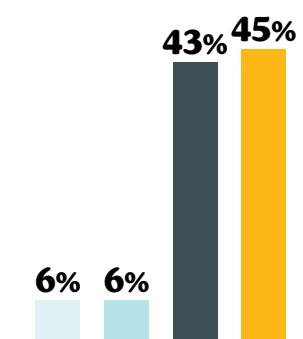
● 25 or more ● 15-24
● 5-14 ● Less than 5



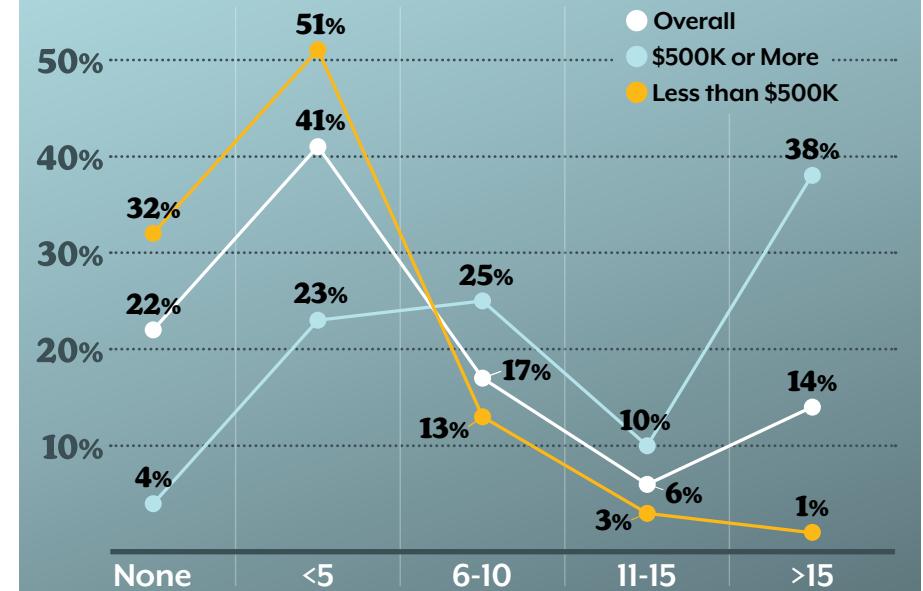
\$500K REVENUE OR MORE



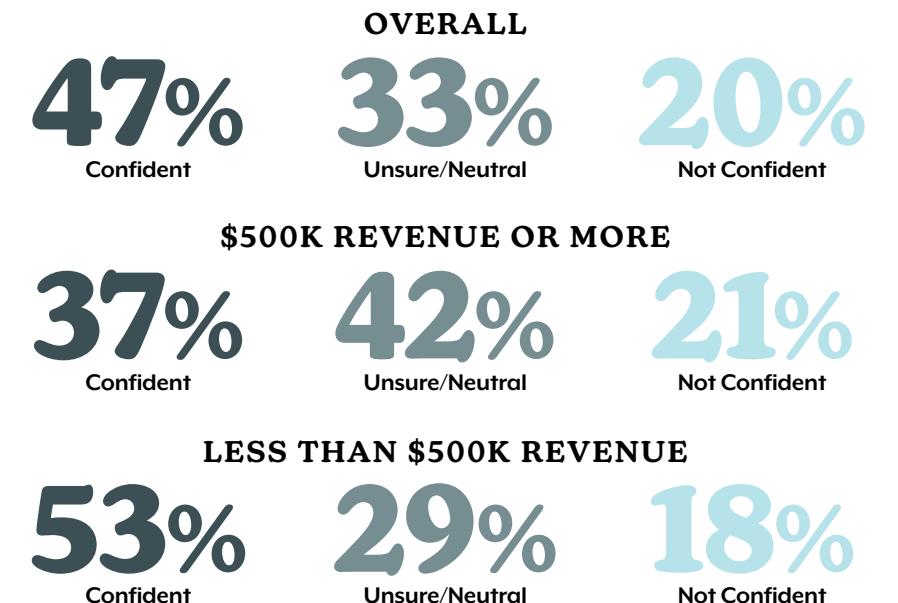
LESS THAN \$500K REVENUE



Hourly Positions Still Needed for Winter 2021-22



How confident are you that you will be at full staff by the season's first billable snow and ice event?





Is Enough, Enough?

Snow pros evaluate how successful they are with managing the labor hiring and retaining processes.

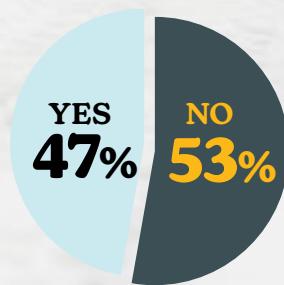
While many snow professionals point their fingers at outside influences and obstacles as reasons for why they're having difficulty hiring and retaining labor, recent research data indicates snow professionals may be partially to blame as well.

Slightly more than half of snow professionals (53%) recently surveyed indicated they do not have employee recruitment and retention strategies in place to deal with the management of their labor resources. In addition, a third of respondents (36%) rate their recruiting practices as below average, more than a third (39%) say their on-boarding procedures are lagging, and a third (33%) would rate their training as substandard. A very low percentage of contractors ranked themselves as "excellent" for any of these categories.

Once on board, though, most snow contractors (90%) believed they do a good or better job at reinforcing with employees their importance to the success of the overall snow and ice management operation. Broken down further, more than half of respondents ranked their organiza-

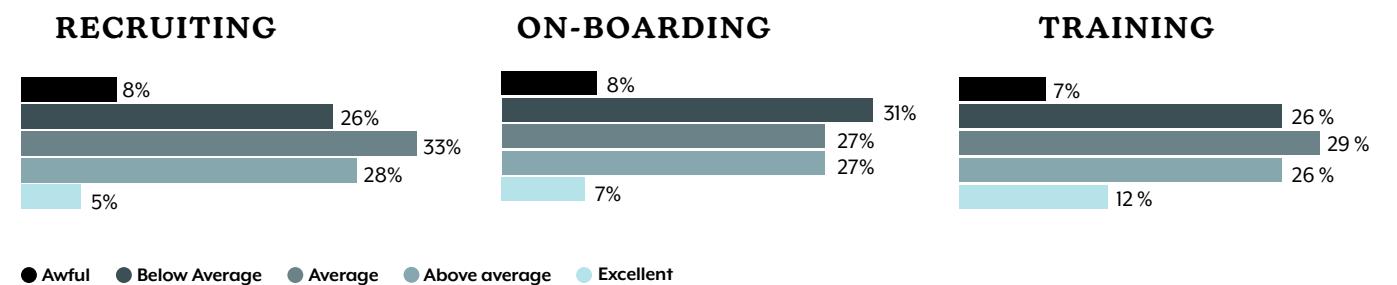
tion's focus on key employee satisfaction areas as "average" or lower. For example, 60% of respondents ranked their benefits package as average or worse, 52% considered both their culture and opportunities for advancement as fair or worse. However, more than half of snow contractors (52%) considered their work environments to be "above average" or better.

Do you have an employee recruiting and retention strategy in place?



On a scale from one to 10, with 10 being excellent, how successful are you at ...

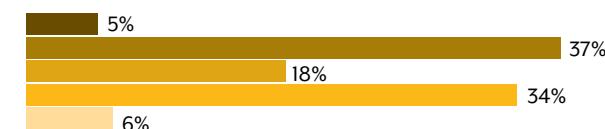
	1	2	3	4	5	6	7	8	9	10
Recruiting	8%	5%	13%	8%	22%	11%	10%	10%	8%	5%
On-boarding	8%	7%	7%	17%	21%	6%	9%	8%	10%	7%
Training	7%	12%	10%	4%	20%	9%	11%	4%	11%	12%



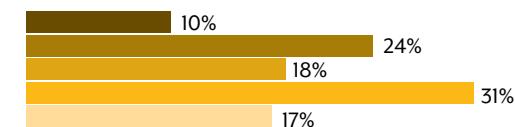
Rate the following about your organization's; 10 being excellent ...

	1	2	3	4	5	6	7	8	9	10
Benefits package	5%	12%	11%	14%	14%	4%	12%	13%	9%	6%
Culture	10%	8%	10%	6%	10%	8%	11%	8%	12%	17%
Work environment	10%	8%	11%	5%	8%	6%	8%	13%	14%	17%
Advancement ops	5%	5%	11%	10%	14%	7%	9%	14%	12%	13%

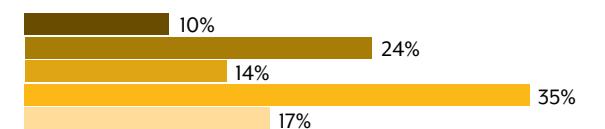
BENEFITS PACKAGE



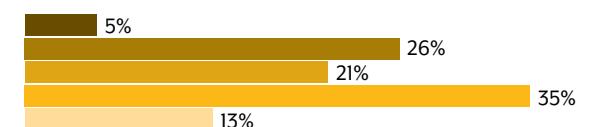
CULTURE



WORK ENVIRONMENT



ADVANCEMENT OPS



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Dog Eat Dog

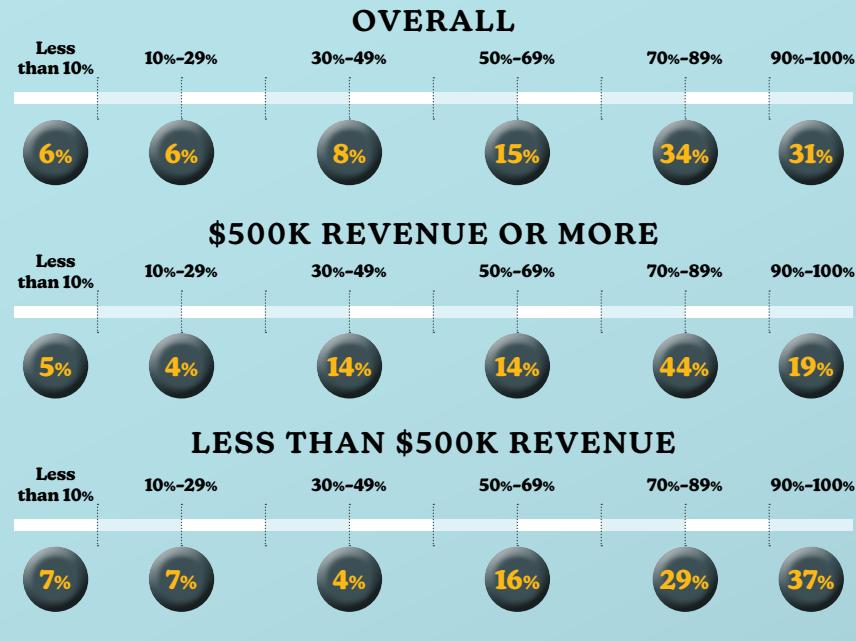
Competition for labor resources is taking a priority with snow contractors heading into Winter 2021-22.

It's a tough market for labor and more aggressive business practices are coming into play to ensure there's enough bodies on the frontlines when winter kicks in. With regard to overall labor retention from the last 12 months, just over a third of respondents (34%) indicated they retained between 70% and 89% of their hourly employees, with 31% carrying over a complete or near complete (within 90%-99%) winter workforce. Only a small percentage (6%) indicated they witnessed a near complete turnover in personnel.

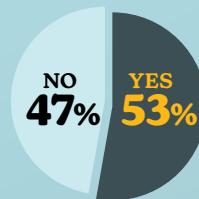
When compared against the size and scope of the winter ops (based on winter revenue), companies doing less than \$500,000 in winter revenue were more successful at keeping the majority (90% or more) of their team together over the last year, as compared to 19% of companies doing \$500,000 or more in snow. In addition, a quarter of smaller-scaled snow ops indicated they were able to retain 100% of their winter staff.

So where are these workers going? The research would seem to indicate a game of human resource musical chairs may be underway between companies. More than half (53%) of respondents indicated their direct competitors were actively recruiting their key employees, and 59% said companies from other industries were poaching their talent, as well. However,

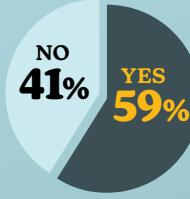
The average retention rate for snow and ice management hourly employees in the last 12 months



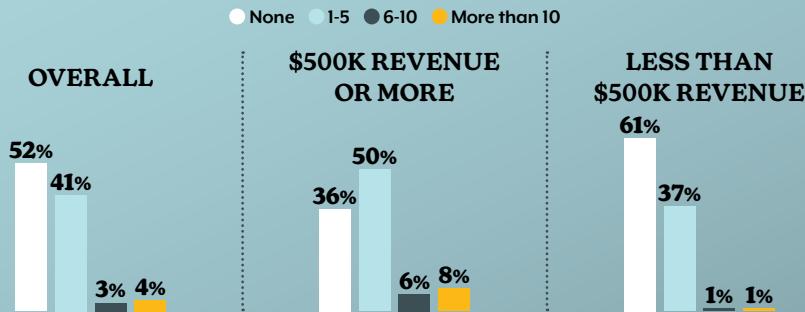
Are your employees being recruited by other competing snow and ice ops?



Are your employees being recruited by businesses outside snow and ice management?



Over the last year, how many employees have you poached from other companies?



survey participants we're no strangers to this practice, with just less than half (48%) actively recruiting winter labor. In fact, 41% confessed to having poached as many as five employees over the last year.

Interestingly enough, the majority of smaller-sized snow and ice management companies (61%) were less apt to poach employees from their competitors, compared to 64% of larger-sized snow and ice companies that indicated they had been recruiting from other companies over the last year.



BOSS Snowrator® The Ultimate Sidewalk Solution

Any snow and ice contractor will tell you, managing sidewalks has its own set of challenges. The BOSS Snowrator is a patented, right-size solution designed to make quick work of snow- and ice-covered sidewalks and brings a maneuverable, multitasking, labor-saving solution to your fleet. Snowrator® reduces the need for shovelers, maximizing productivity and efficiency — whether in metro, commercial or residential environments — where clean and clear walking surfaces are always the top priority.

The BOSS Snowrator® saves time by allowing operators to brine, spread and plow at the same time, maximizing on-the-job productivity.

Snowrator® saves on labor, allowing smaller teams to quickly deploy for plowing and deicing surface areas. In fact, one Snowrator® can do the job of multiple shovelers, reducing payroll and maximizing profitability.

Saving money and increasing productivity is just the start. Adding Snowrators to your fleet also means:

- Fewer headaches recruiting hard-to-find seasonal labor
- Relying less on unpredictable and unreliable labor options ... a Snowrator® won't call in sick
- Feeling confident taking on more sidewalk-heavy contracts

But don't take our word for it, here's what contractors around the county are saying:

Snowrator® easily replaces 3-4 guys shoveling ...

"The Snowrator has been a game-changer for my business. One Snowrator easily replaces three to four guys shoveling, which has made us more efficient and my bottom line more profitable."
— **Tom Canete, President/CEO of Canete Landscape and Snow Management**

We've reduced our salt costs by 30% ...

"The time and money saved has been amazing because with one Snowrator, we've reduced our salt costs by 30%. Salting, brining, clearing—Snowrator has had a huge impact on our snow and ice business." — **Brian Hominiuk, Vice President of Foegley Landscape**

We've Saved 40% on Labor Costs ...

"The Snowrator is one of the most underrated tools out there—small in stature, but big in impact. By adding Snowrators, we've saved 40% on labor costs, while improving quality and consistency of work." — **Rafael Diaz, President of Diaz Group LLC.**

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