



2026

Commercial Landscape Industry Report





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Summary Findings

Commercial landscaping contractors are focusing on new projects (79%) and growing their client base (71%) in the coming year, with 70% not planning to add any new services, an Aspire survey shows.

Survey respondents say client retention (54%) is vital to their bottom line, with businesses focusing on repeat business (35%), and word-of-mouth referrals (26%). Inbound marketing (16%), outbound sales (14%), and association partnerships (10%) are leveraged less.

Maintaining a stable workforce, predicting cost increases and limiting delays are key to retaining, and growing, the client base, respondents say.

★
**Commercial landscapers
focused on client retention
and competitive edge,
Aspire survey shows.**

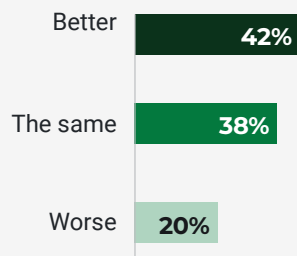
Technology offers another competitive edge. More than half of survey respondents report using end-to-end systems; an additional 31% indicate plans to invest in less-fragmented solutions that could streamline their operations.

Overall, while slightly fewer respondents anticipate gains in revenue and profit in 2025 than in 2024, industry leaders predict the successful companies will be those who focus on optimizing operational efficiency and practice financial discipline.

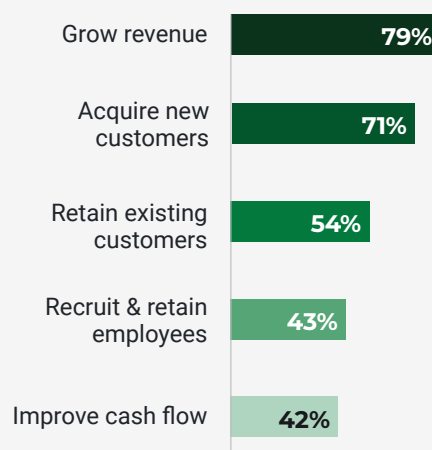


Business Outlooks

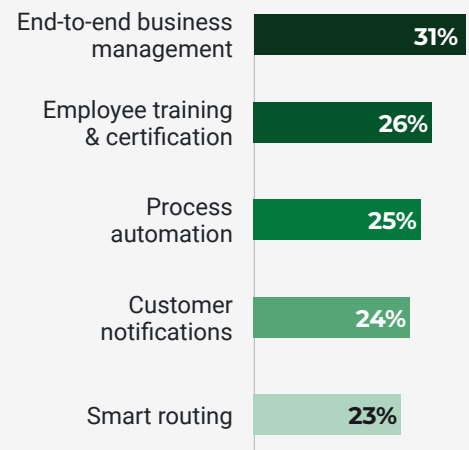
Market Outlook



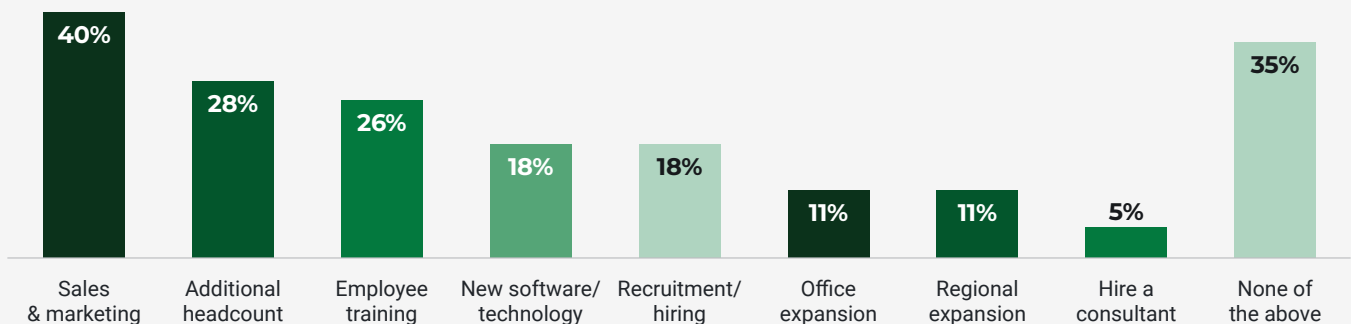
Top 5 Ranked Business Goals



New Technology in 2025



Business Investments





Aspire surveyed, through Thrive Analytics, 1,015 owners and executives of commercial landscape companies. The survey was conducted from May 2–23, 2025.

This report features the key findings of the survey and important takeaways for companies who focus on commercial landscaping.

Jon Gohl, Director of Customer Experience at Aspire, who has been at the company for more than a decade, also offers his thoughts on the survey findings. Guided by his 15 years of prior experience in the landscape industry, Jon leads strategic advocacy efforts, including Aspire in Universities, which provides software for industry-specific degree programs. He also engages with and leverages relationships with Aspire Ambassador customers.

****Note: Forward-looking economic and industry outlooks represent the views of the survey respondents, and may not represent the view of ServiceTitan or its affiliates.***

Key Findings

Beyond the aforementioned, here are other key findings of the survey:

- **Revenue growth is dependent upon client retention.** In addition to repeat business and word-of-mouth advertising, the benefit from maintaining a steady client base is recurring maintenance services, through which 59% of survey espondents reported they earn the majority of their revenue.
- **Anticipating market challenges keys retention and growth.** As labor shortages continue, 70 percent of respondents say they will increase wages (44% by 4% or more) to remain competitive and ensure customer satisfaction.
- **Most seek to improve profitability by tightening existing operations.** 70% of survey respondents have no plans to add services in the coming year, many (41%) choosing instead to look at optimizing existing processes and workflows to increase profit margins.
- **Streamlining software platforms could lead to savings.** Platform fragmentation remains common, with 90% of respondents using at least four software systems for end-to-end operations, and 61% using seven or more.



01

Key Takeaway



When you see materials costs being such a big concern, that's a signal companies need to evaluate their purchasing processes and order smarter than ever.

Jon Gohl

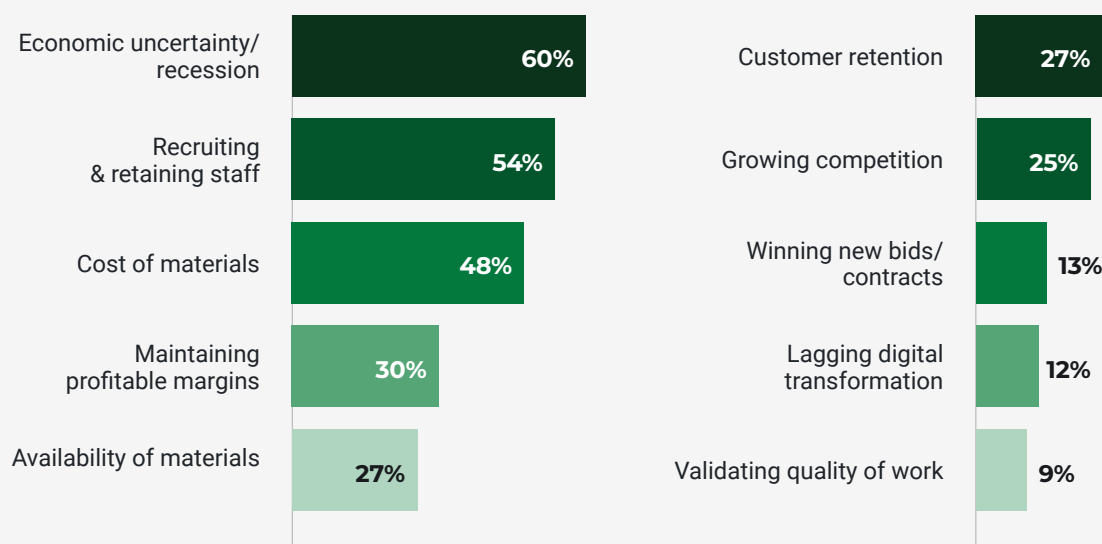
Director of Customer Experience at Aspire

Commercial landscape contractors face economic uncertainties.

An uncertain economy, possible recession, and higher equipment and material costs threaten landscape contractors' bottom line. Still, of the contractors surveyed, 42% expect market conditions to improve, while 38% believe they will remain the same.

- The greatest risk to meeting goals, respondents said, are economic uncertainty/recession (60%), retaining employees (54%), cost (48%) and availability (27%) of materials, and maintaining profitable margins (30%).
- Anticipating equipment and material costs will increase by 10 percent or more (37%), respondents worry about accurately forecasting job costs and profit margins.
- The availability of equipment and materials also could delay projects; 58% of respondents predict lead times of two to three weeks or more.

Business Risks to Meeting Goals in 2025



02

Key Takeaway

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When you have materials going through the roof and labor shortages, you've got to tighten up. Are we efficient? How quick are we getting off the lot? That alone saves money. What's happening on the lot is happening in the field.

Jon Gohl

Director of Customer Experience at Aspire

Labor shortages lead to salary pressures for contractors.

Commercial landscape contractors, already facing a labor shortage, are finding that pay disparities between maintenance employees and construction workers are making the market much more competitive and threatening companies' abilities to start and finish jobs on time.

The pay difference between the maintenance and construction workers hourly salary was reported to be between \$4 and \$5 an hour, or \$160 to \$200 for a five-day, 40-hour week.

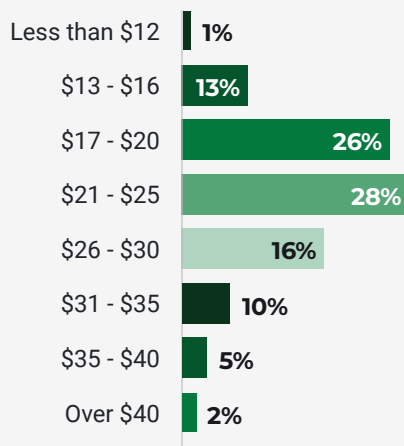
- Of respondents, 28% pay maintenance crew members an average of \$21 to \$25 per hour.
- 30% of construction crew workers fall in that same pay range, \$21 to \$25 per hour.
- 70% of survey respondents say they intend to raise wages, 44% by 4% or more, to remain competitive.
- About a third of subcontractors (34%) are paid a flat rate, with a combination of flat rate and other pay systems used by another 25% of respondents.



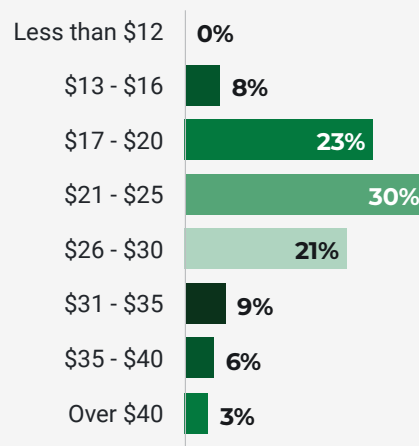


Crew Salaries & Raises

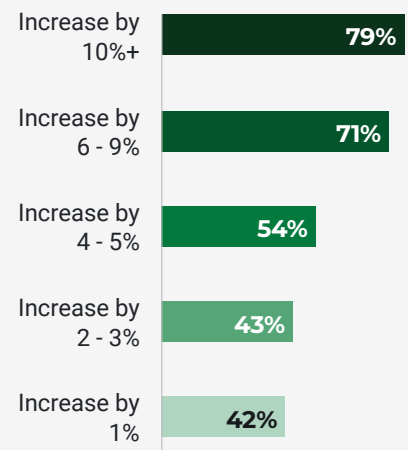
Maintenance Crews



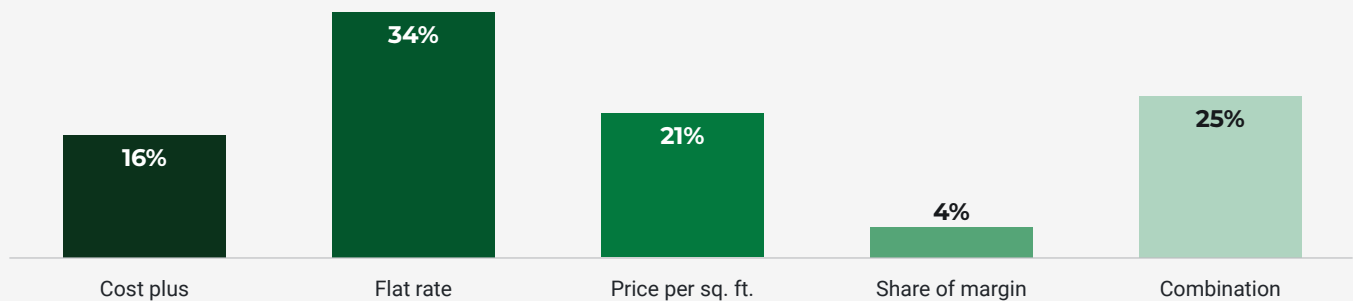
Construction Crews



Crew Raises



Subcontractors



03

Key Takeaway



People are invoicing within four days of the job being done, yet 60% are behind on payments. They should revisit their customer relationship and communicate expectations, as well as leveraging ACH or payment partners.

Jon Gohl
Director of Customer Experience at Aspire

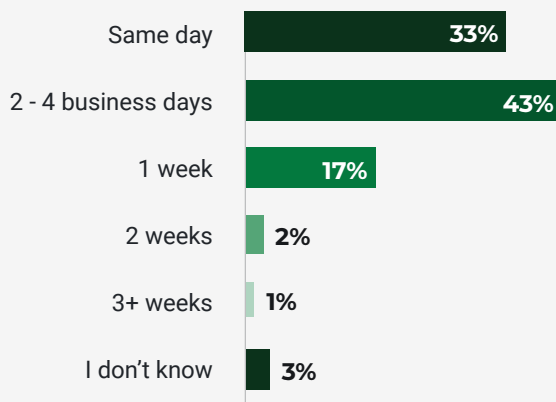
Cash flow delays often leave contractors in the lurch.

Improving cash flow is among the top goals of survey respondents (42%), but even with timely billing contractors sometimes have difficulty getting paid, the data shows.

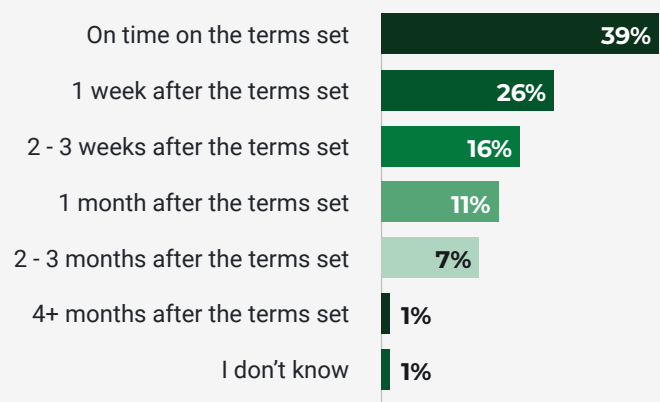
- Even with 76% of contractors surveyed reporting that they bill within four days of job completion, only 39% report receiving payments on time, contributing to persistent cash flow issues.
- A third of respondents say they send invoices on the same day work is completed.
- Still, 60 percent of payments are received at least a week after the terms set in the agreement, and 7 percent of respondents say payment can come two to three months late.

Invoicing & Payments

Sending Invoices



Collecting Payments



04

Key Takeaway



One of the additional service lines [a company in Boulder, CO] now offers is foundations. We don't think of that as landscaping, but it's something [landscape companies] are equipped for. They build walls, they do these things every day.

Jon Gohl

Director of Customer Experience at Aspire

The money's in maintenance and bid-build, while retention remains essential to revenue growth.

Revenue in the commercial landscape industry is anchored to recurring services, with maintenance contracts making up the bulk of the earnings.

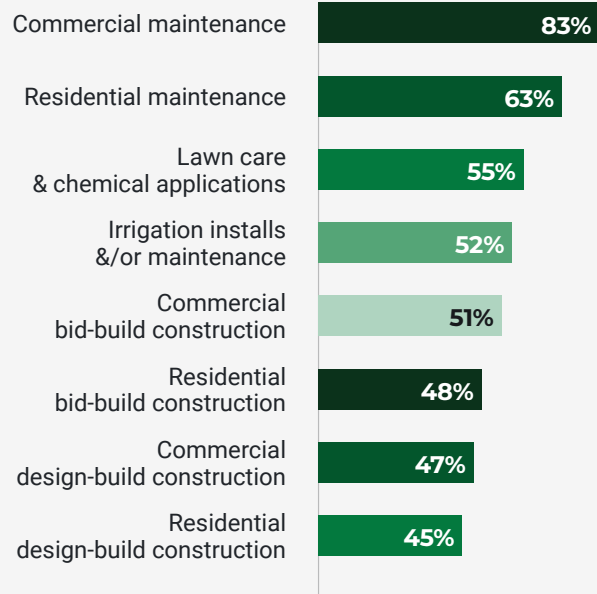
When it comes to projects, two-thirds of survey respondents report the majority of their income is from bid-build clients, with the other third saying the majority is from design-build. Respondents said their focus is on existing services and new/existing customers rather than expanding services.

- 59% of survey respondents report earning the majority of their income from maintenance services.
- 41% say they will focus on improving existing processes and workflows, while 38% will work to increase their profit margins.
- Regardless of service focus, retaining clients is vital to companies' survival. Survey respondents report 35% of revenue is from repeat business and 26% from word-of-mouth referrals.

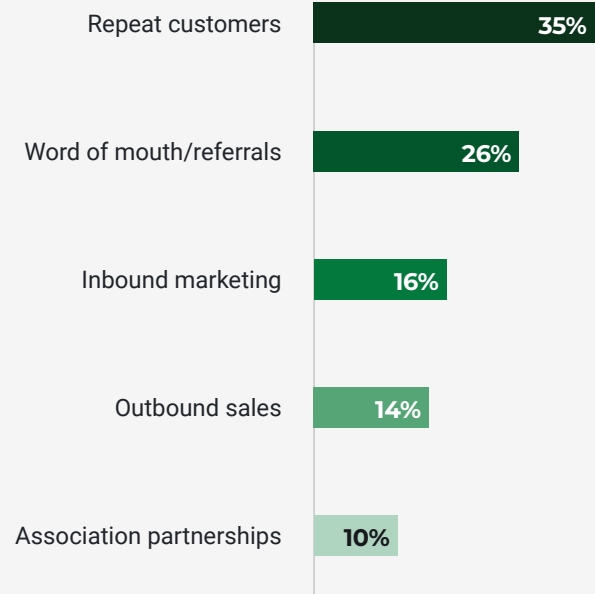


Revenue Splits & Sources

Landscaping Market Services: All Services



Channel Volumes: Most Revenue



05

Key Takeaway

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Landscaping companies haven't always had software tailored to landscaping. They've historically been late to get on the boat with technology because no one got on board with them.

Jon Gohl

Director of Customer Experience at Aspire

Technological improvements give contractors a competitive edge.

Interest in technology is growing as landscapers look for ways to optimize their operations.

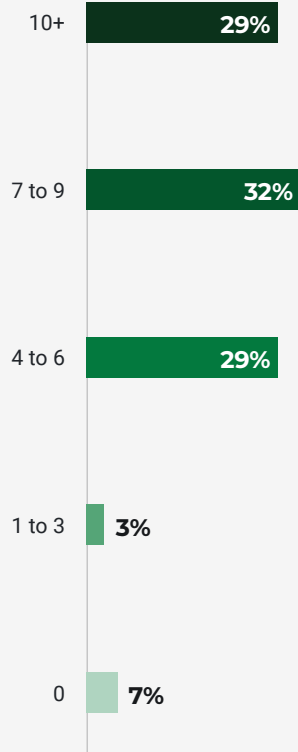
The use of end-to-end software systems is unusual in the industry because of the cost, time to train on a new program, and disruption to the daily workflow. However, software adoption in general is common, particularly for core and business functions.

- Fragmented systems are the norm, with 62% of survey respondents using seven or more software solutions, and 29% using 10 or more.
- For companies that are looking to change solutions, their top reasons are to automate workflows (58%), improve operational efficiency (51%), address feature gaps (44%), scale effectively (36%), and increase gross margins (30%).
- The most common considerations when switching solutions include features and functionality (47%), price (45%), all-in-one business management solution (43%), integration with existing systems (36%), and customer support/training (28%).

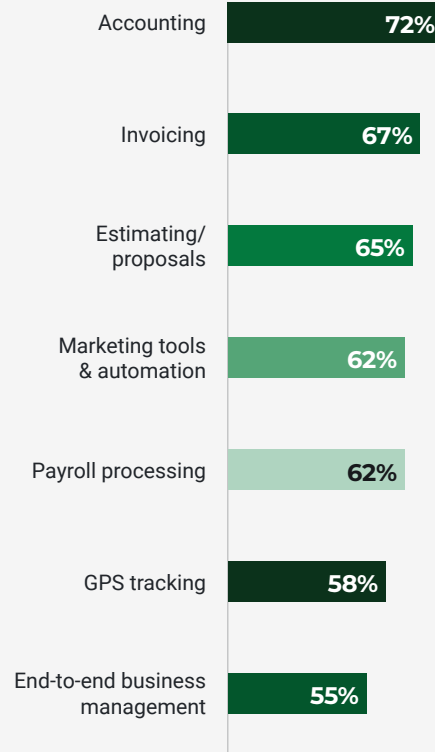


Technology Adoption

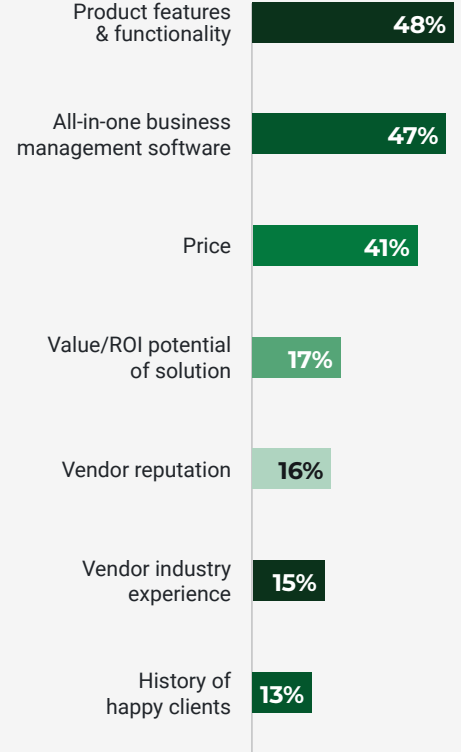
Number of Software/Services Used



Software Used



Reasons for Choosing Provider



Conclusion

End-to-end business management

The Aspire survey identified several challenges facing the commercial landscaping industry over the next year, but also highlighted opportunities for companies to continue growing.

Despite an uncertain economy, contractors expect to continue growing revenue and building a stronger client base, even without offering new services. Many are ensuring their success by including wage increases for employees in their budgets and looking at new software that will help make operations less fragmented and more efficient.




As technology continues to advance, so too will the landscaping industry, optimizing its processes and workflows and growing profitability.





Aspire is the leading cloud-based, mobile-ready SaaS provider of business management software for landscape maintenance, landscape construction, and snow & ice operations. Aspire's robust end-to-end functionality supports growth at every stage by enabling companies to better manage, create, and execute against their business opportunities and challenges. Aspire helps contractors change the way they manage their business by providing real-time visibility into their operations to enable data-informed decisions that drive greater efficiency and higher profits.

 [Learn more at youraspire.com](https://youraspire.com)

Published on July 14, 2025