



SNOW & ICE SYMPOSIUM

Snow & Ice Workplace Report: Summary of Findings

June 28, 2024



WolfWorks Consulting



2024 Snow and Ice Workplace Report



- Survey Background
- Respondents
- Key Findings
- Q & A



- Commissioned by the *SIMA Foundation* – the commercial snow and ice industry’s 501(c)(3) charitable organization
- Furthers its **mission** of providing impactful research to industry stakeholders
- **Workplace dynamics** was identified as a topic imperative to study
- Survey design was based on exploratory focus groups, and input from SIMA Foundation and SIMA board members

Why deploy an industry Workforce study?

*SIMA members can **learn**:*

- Illustrate workforce composition and salaries of snow & ice providers
- Show use of recruiting methods, employee benefits, and career development supports
- Inform providers about workplace culture best practices and pitfalls



*SIMA members can **take action**:*

- **Calibrate staffing and pay rates appropriately**
- **Enhance hiring and retention efforts**
- **Improve employee satisfaction, retention rates**
- **Position firm for growth**

Workplace dynamics of **129** S&I firms were captured in [Oct.-Dec. 2023](#)

Approach

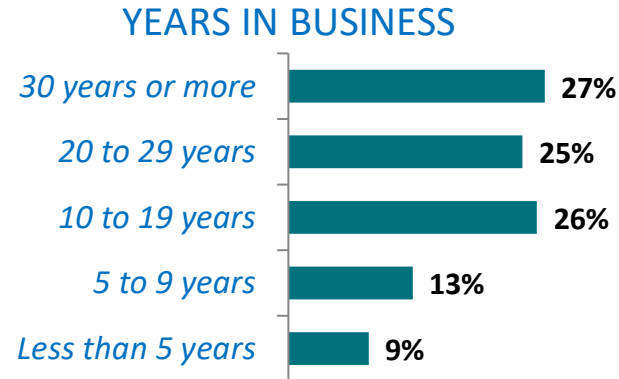
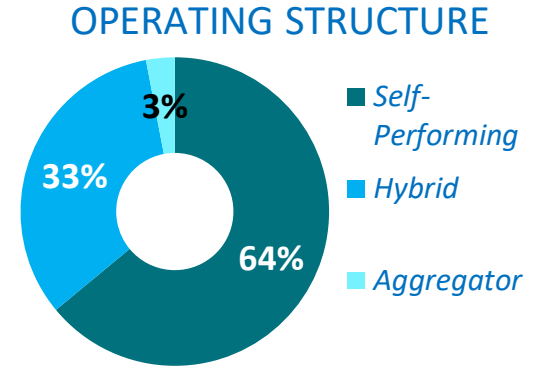
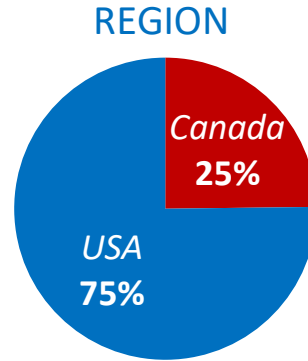
- Online survey – 43 questions, 8-16 minutes
- Fielded to mix of SIMA members and non-member operators
- All respondents are senior executives, finance/operations, or HR personnel who self-rated as very familiar with firms' workplace

Key Topics

- ❑ **Workforce and Pay:** Employees in total and per role, seasonality, average salaries, pay trends, use of subcontractors
- ❑ **Hiring and Retention:** Recruitment sources, employee tenure
- ❑ **Benefits and Culture:** Health, retirement and other perks, career development resources, workplace culture and challenges

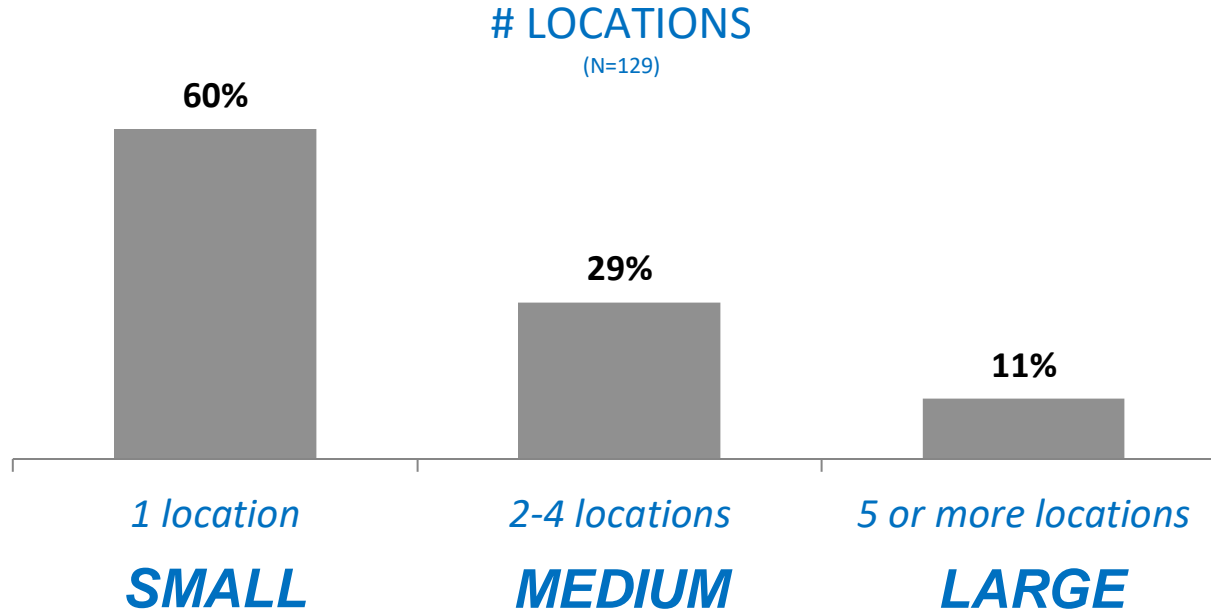
Respondents

- 3 in 4 are American (mostly from Great Lakes, Mid-Atlantic, New England and Plains regions), 1 in 4 are Canadian
- 2/3 are self-performers, 1 in 3 are regional firms that utilize a sub-contractor model, and a few are major national firms
- They have been in business for an average of **22 years**



Approximate Firm Sizing

Survey analysis is organized for Small, Medium and Large providers, using reported # locations as a proxy for firm size:



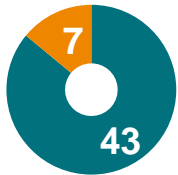
Personnel – Volume/Mix

Small firms typically employ 50 people; Medium firms employ close to 100; Large operators with 5+ locations employ nearly 600

1 LOCATION (N=78)

Total workforce:

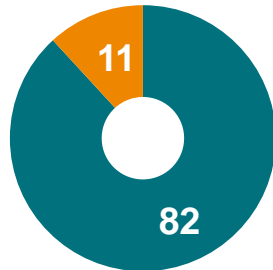
50



2-4 LOCATIONS (N=37)

Total workforce:

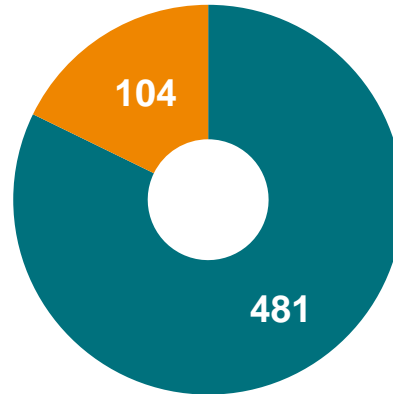
93



5+ LOCATIONS (N=14)

Total workforce:

585



WORKFORCE COMPOSITION:

- 15% are managers (office-based positions – assistants, directors, executives)
- 85% are field workers (equipment operators, crew, maintenance)

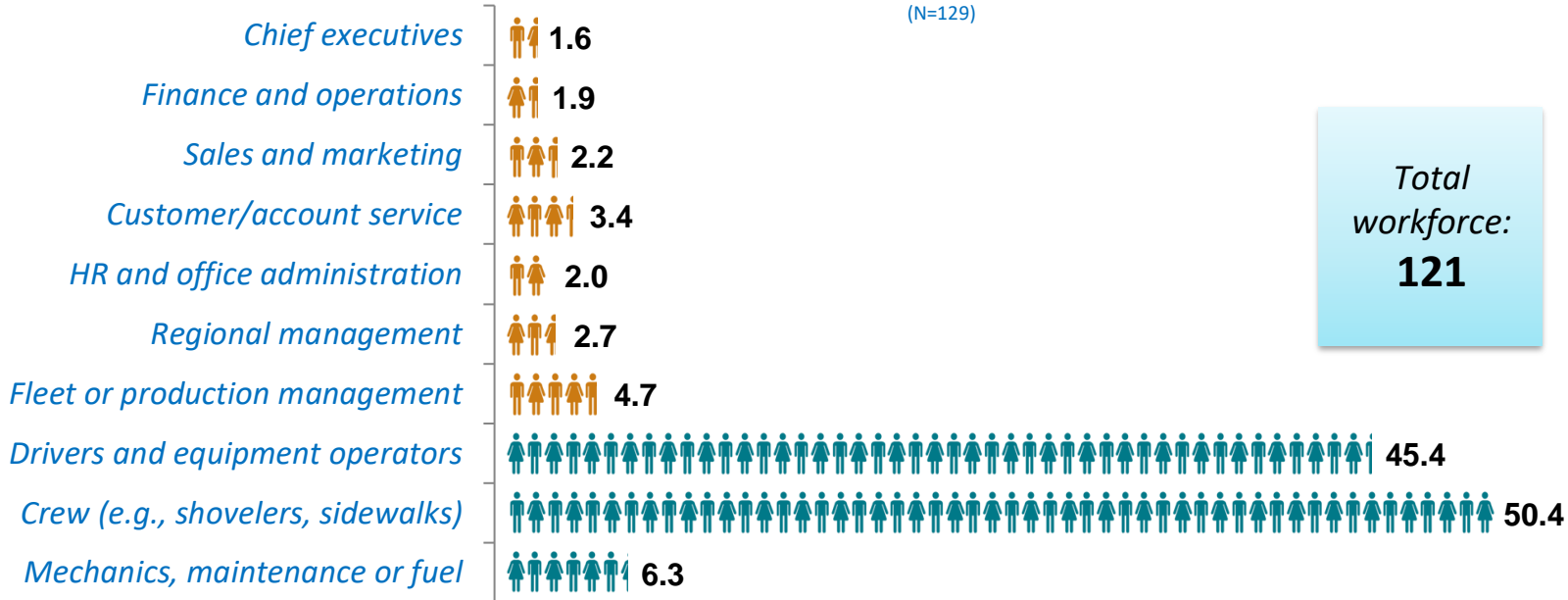
Personnel – Roles

The typical S&I provider employs... 1-3 managers per function, 45 drivers and 50 crew, supported by 6 mechanics



AVERAGE EMPLOYEES PER ROLE

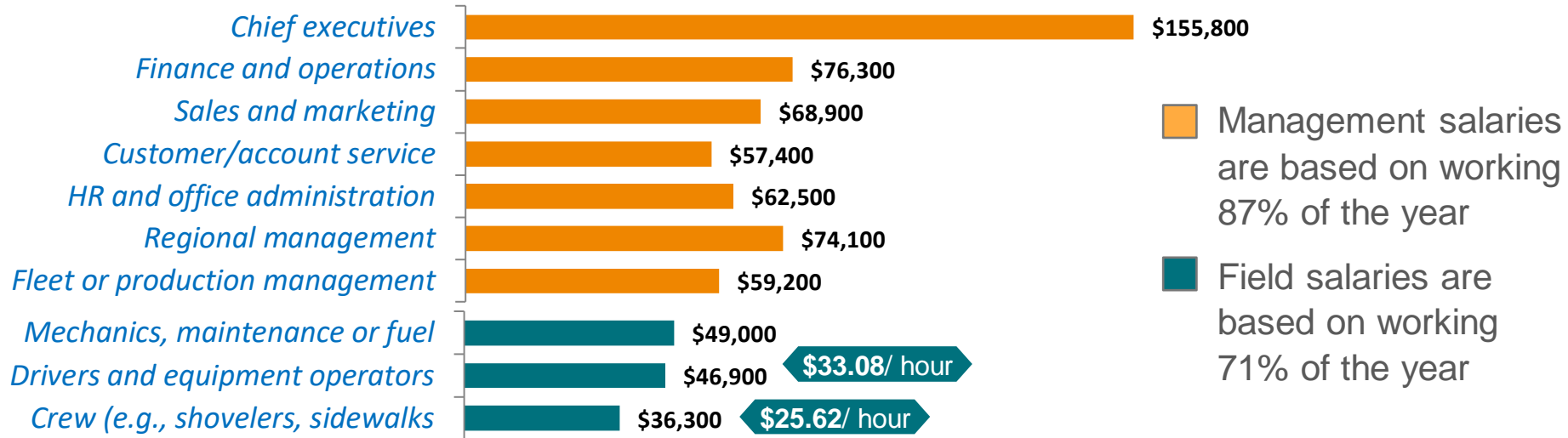
(N=129)



On average, S&I firms' chief executives earn \$155,000 while other function-specific managers are paid from \$60,000 to \$75,000

Equipment operators earn \$33/hour, while crew members earn \$26/hour

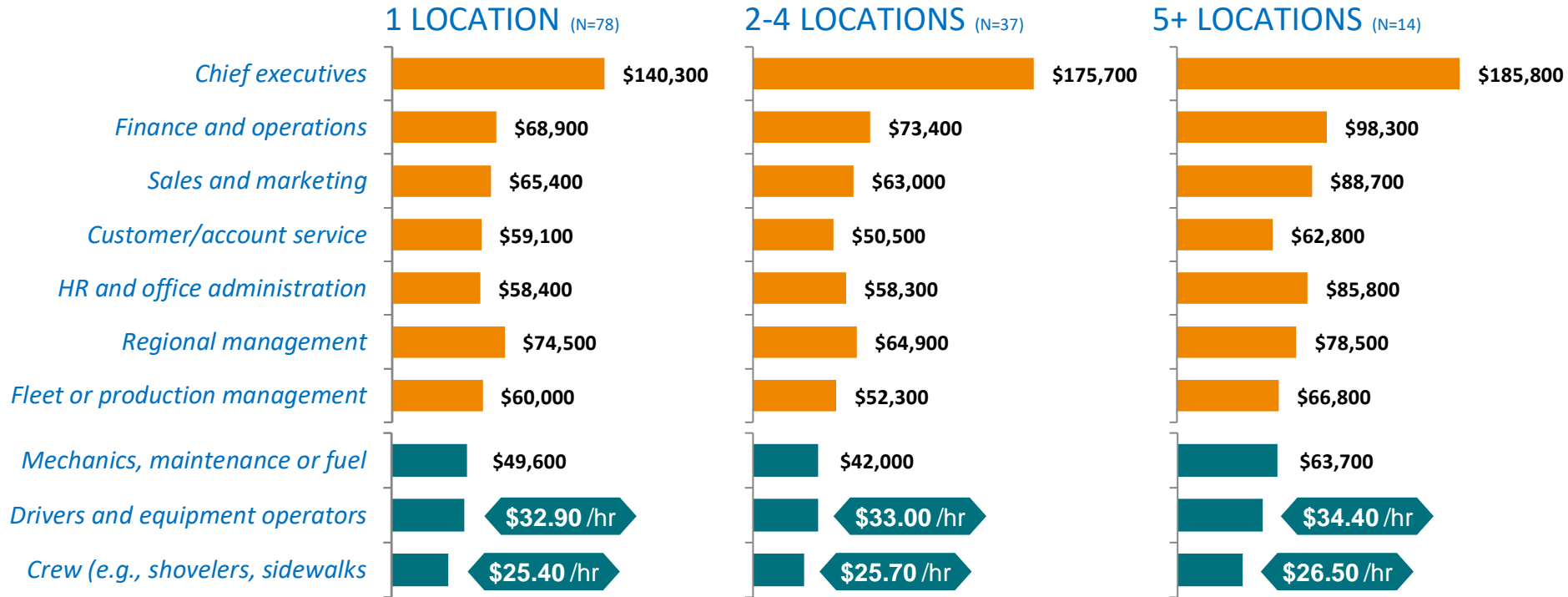
AVG. PRO-RATED SALARY



Q: What is the approximate [annual salary of [ROLE]/ [hourly wage of [ROLE]]? Q: Considering only those who work – at least in part – on snow & ice services, about what percent of your firm's [office and managerial employees]/ [field employees] are employed by the company for the following lengths of time?

Salaries – by Size

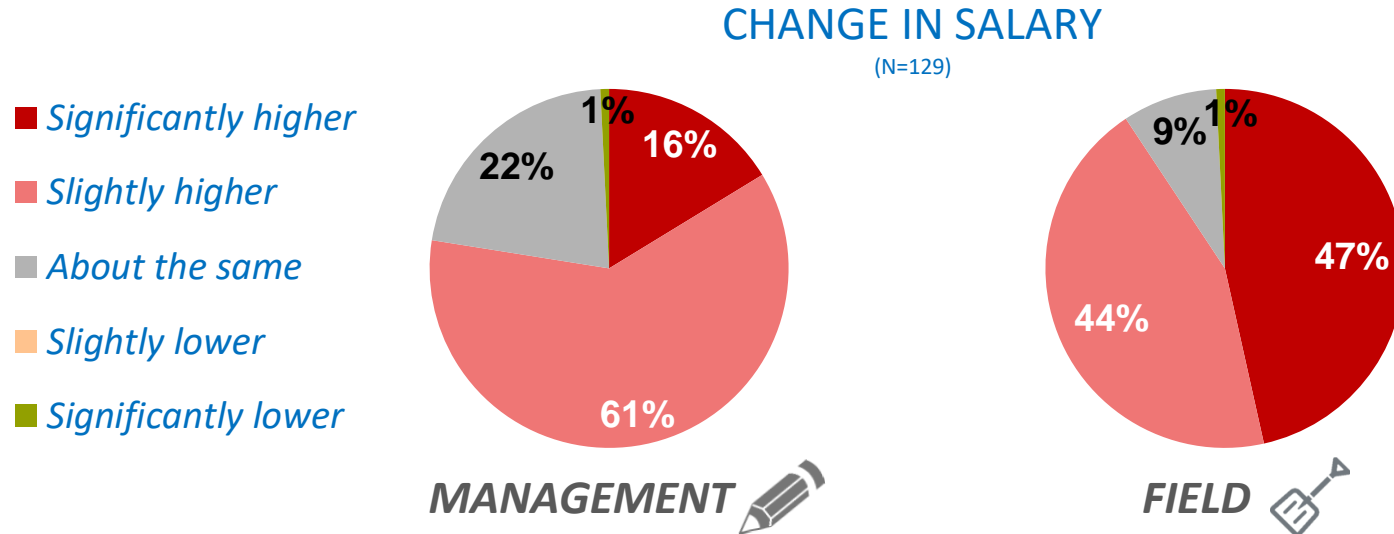
Management pay increases with firm size, whereas Field wages are nearly constant



Q: What is the approximate [annual salary of [ROLE]/ [hourly wage of [ROLE]]? Q: Considering only those who work – at least in part – on snow & ice services, about what percent of your firm’s [office and managerial employees] / [field employees] are employed by the company for the following lengths of time?

Wages have been on the rise lately, often substantially

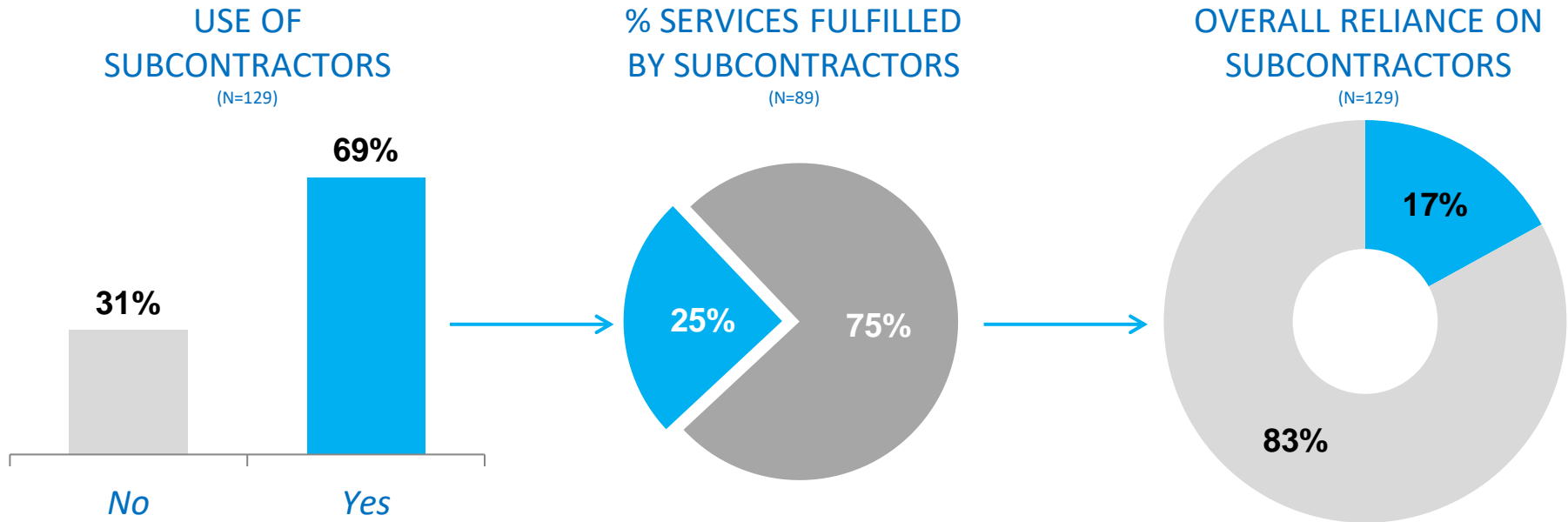
- 77% report that management salaries are “significantly ” or “slightly” higher lately
- Field pay hikes are even more extreme – 90% report they are higher now than 2-3 years ago



Q: For each type of snow & ice worker, how has their pay changed over the past 2-3 years?

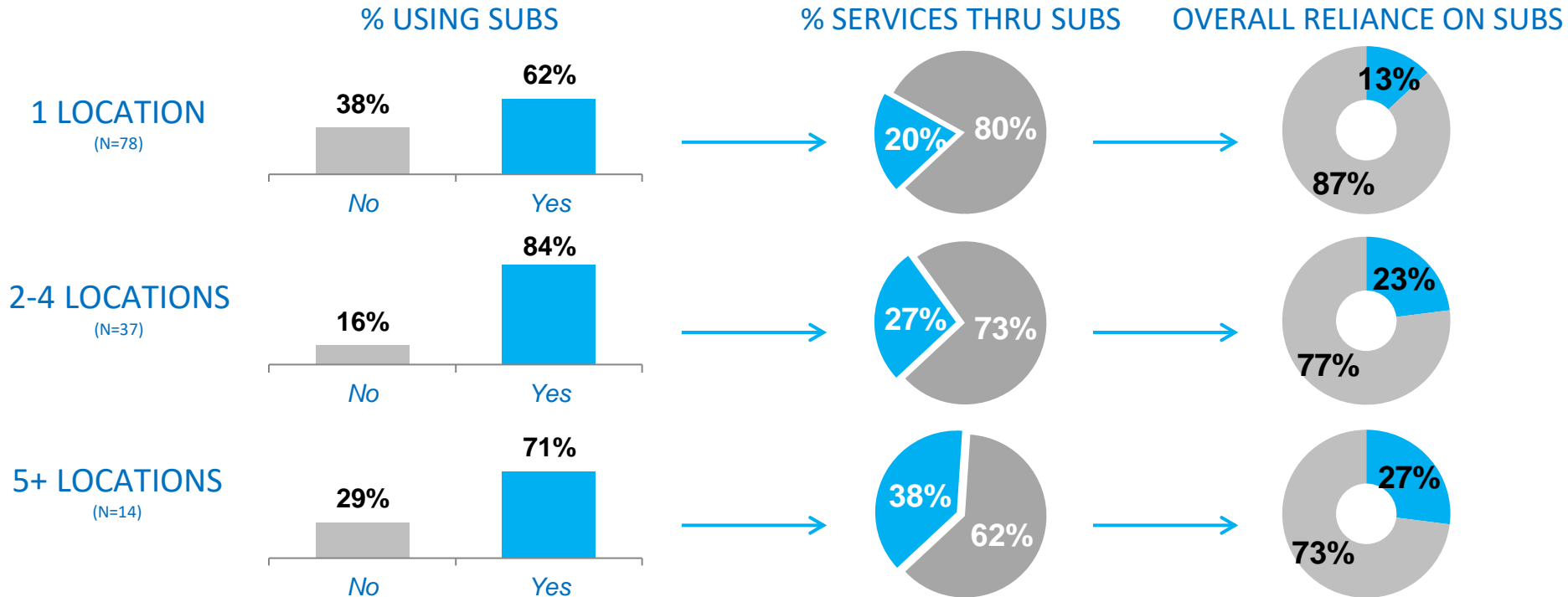
In addition to their own employees, 17% of S&I services are fulfilled by subs

- 2 in 3 firms elect to use subs in some way – when they do, they outsource 25% of operations



Subcontractors – by Size

Small firms rely least on Subcontractors, while Large firms utilize them most



Q: In addition to its own employees, does your company also use subcontractors? Q: What percent of your company's total snow and ice services are fulfilled by subcontractors?

Workplace Challenges

Asked which obstacles they face most in their work environment, providers' described difficulties in **hiring good people, combating salary hikes, properly training their people, battling workers' negative attitudes, and retaining strong workers**

Hiring

- Small or unqualified labor pools; Snow removal work unappealing since it is seasonal, intermittent, or labor intensive

Turnover

- Retention issues due to unpredictability of hours (weak snow levels not keeping workers busy enough, or harsh seasons overtaxing workers), and/or perceived low pay; Newest hires tend to leave most quickly

Labor Costs

- Rising wages both in and outside the industry; Steep new hire demands

Training

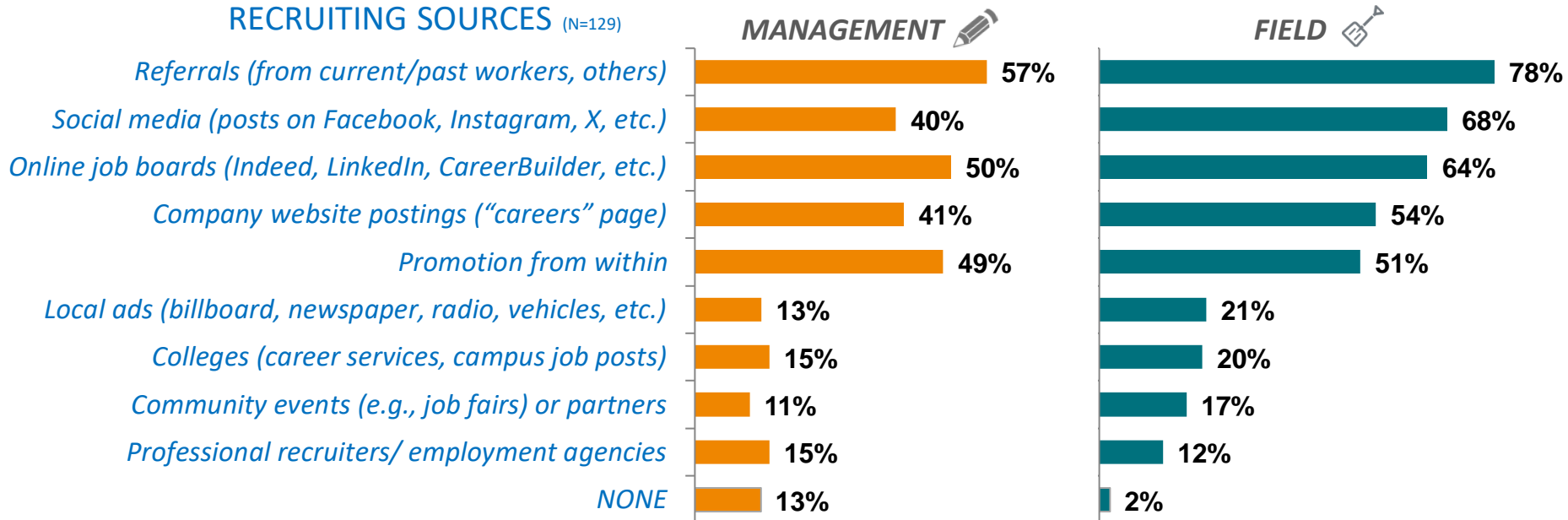
- Difficulty preparing workers before snow events, and up-skilling them

Reliability

- Chronic absenteeism, poor work ethic, sour attitudes, or drug use

S&I firms appear resourceful in pursuit of talent – to find new workers they rely most on word-of-mouth, followed by social media campaigns, posting on job boards and their own websites, and promoting workers from within their own company

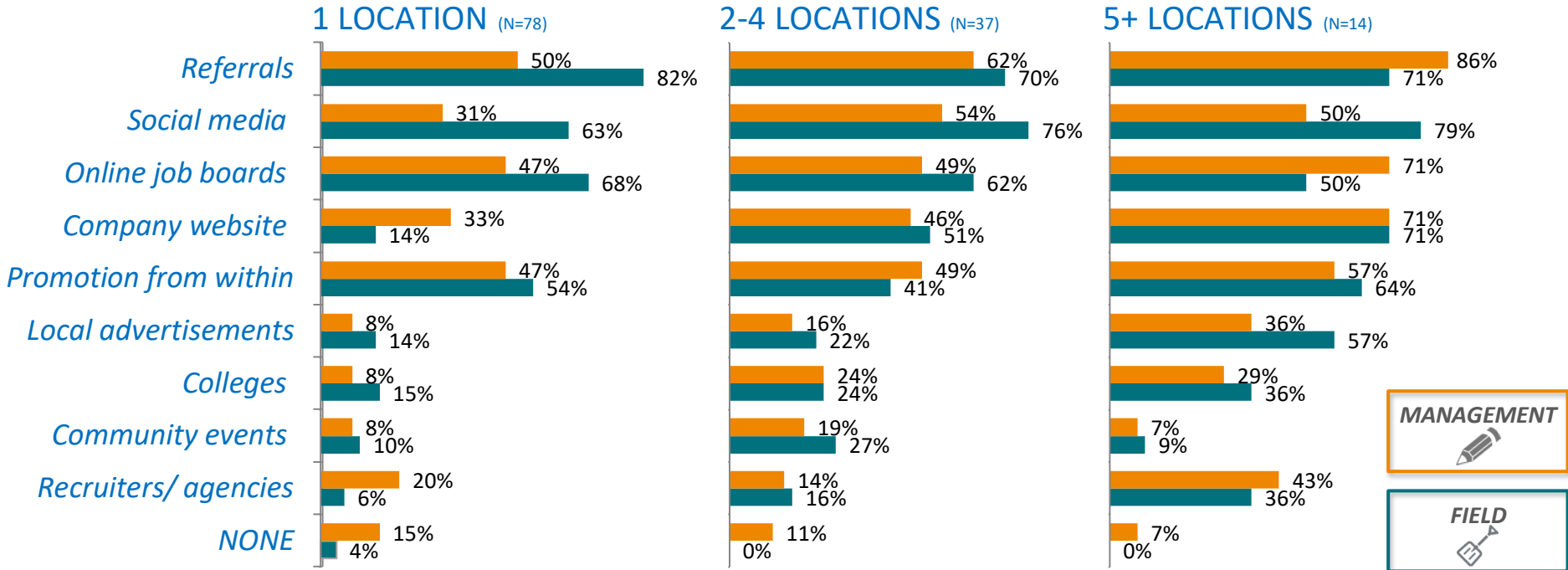
RECRUITING SOURCES (N=129)



Q: To hire [office and managerial] [field] employees for (at least in part) snow & ice roles, which sources does your company rely on?

Recruiting – by Size

Largest operators rely on the widest variety of sources (averaging 50%+ each), while Small firms' activities are largely limited to referrals, social campaigns, job boards



Q: To hire [office and managerial] [field] employees for (at least in part) snow & ice roles, which sources does your company rely on?

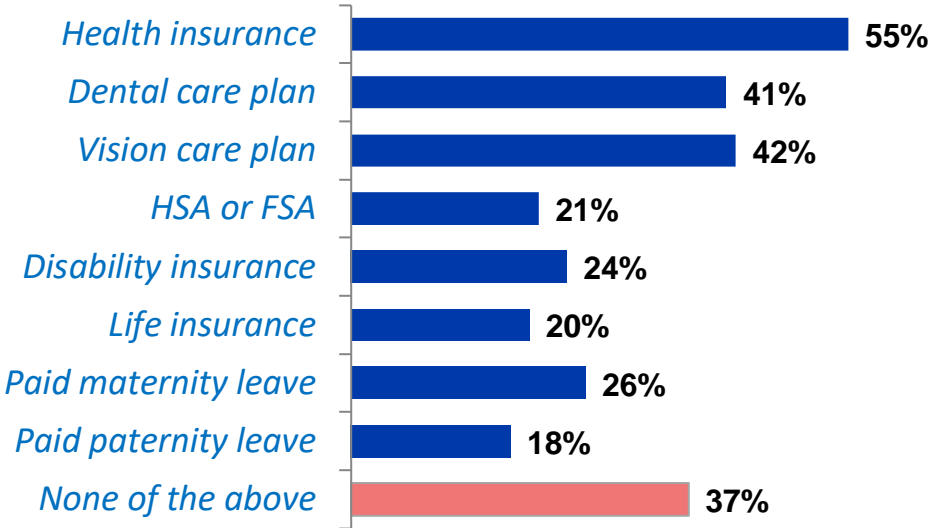
Health Benefits

Just over half of US firms provide health insurance, and **American** operators are less likely to offer dental, vision, or disability or life insurance than **Canadian** firms

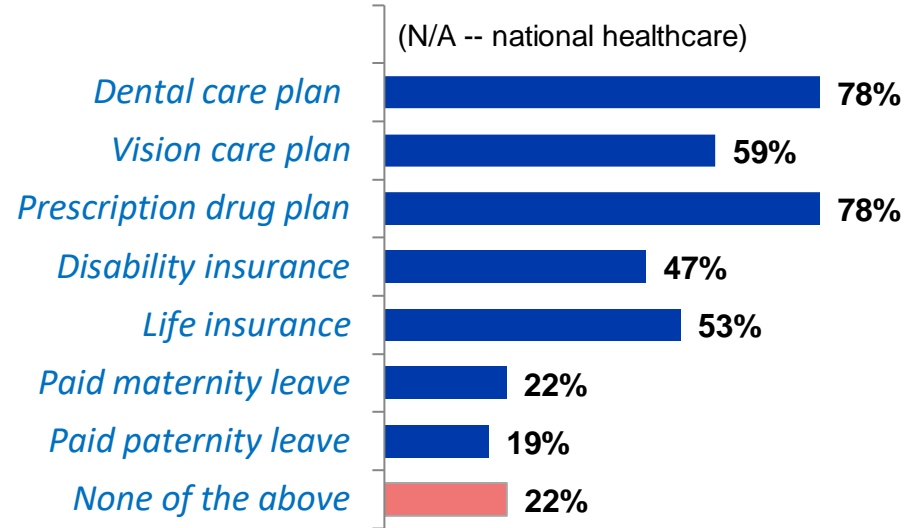
HEALTH & INSURANCE BENEFITS



USA (N=97)

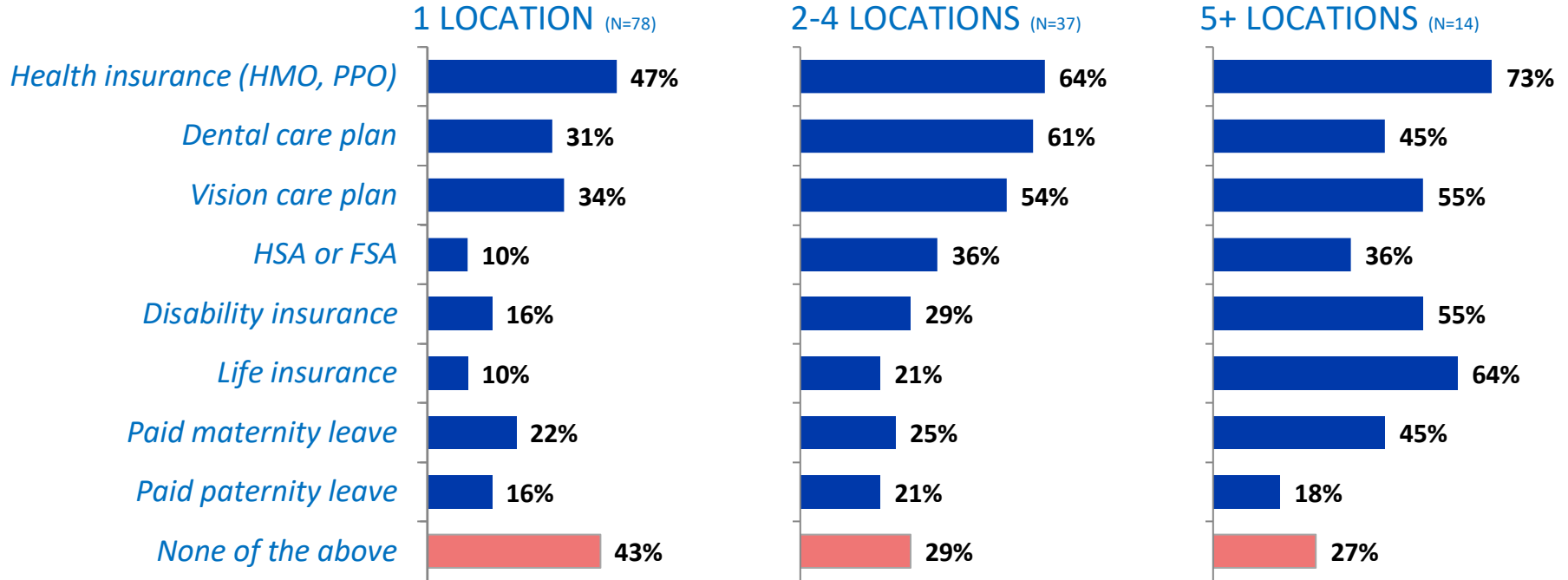


CANADA (N=32)



Health Benefits – by Size

Among US firms, nearly half of Small ones offer no health benefits; Large firms are most apt to offer additional perks like life, disability, maternity leave



Q: Which of the following health and insurance benefits does your company offer?

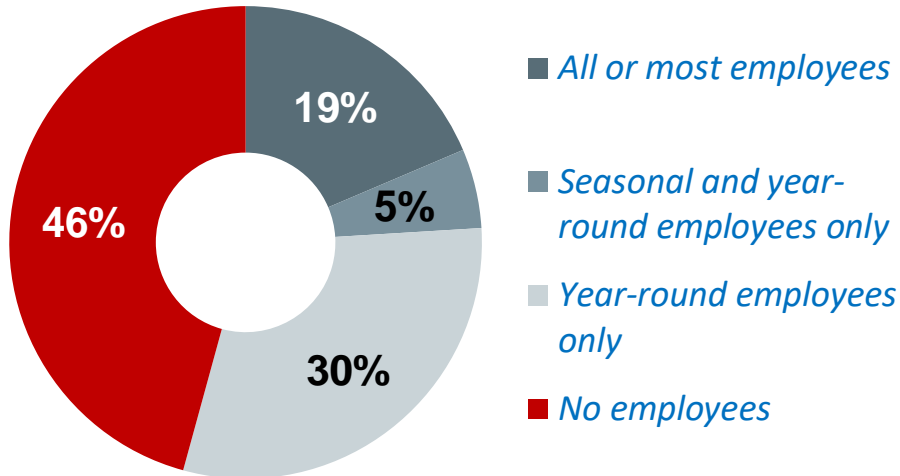
Retirement Benefits

Just over half of S&I firms provide retirement plans (401k in USA, RRSP in Canada) – and when they do, the perk is often limited to year-round workers

- 9 in 10 who offer plans also choose to match workers' contributions – averaging 3%

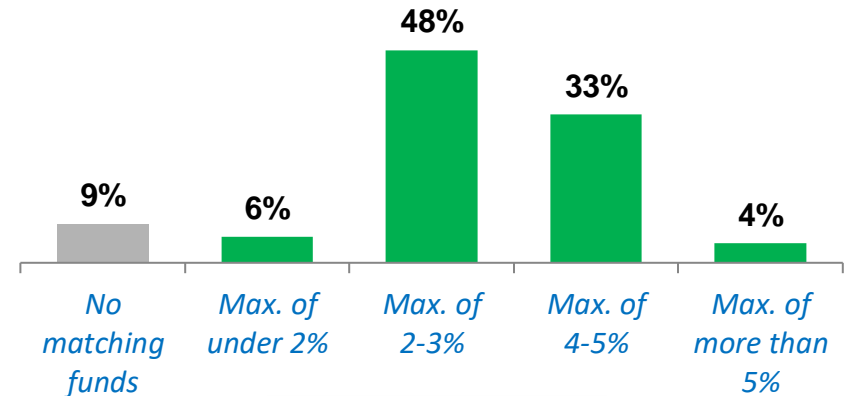
WORKERS RECEIVING RETIREMENT BENEFITS

(N=129)



% COMPANY RETIREMENT CONTRIBUTION

(N=69)

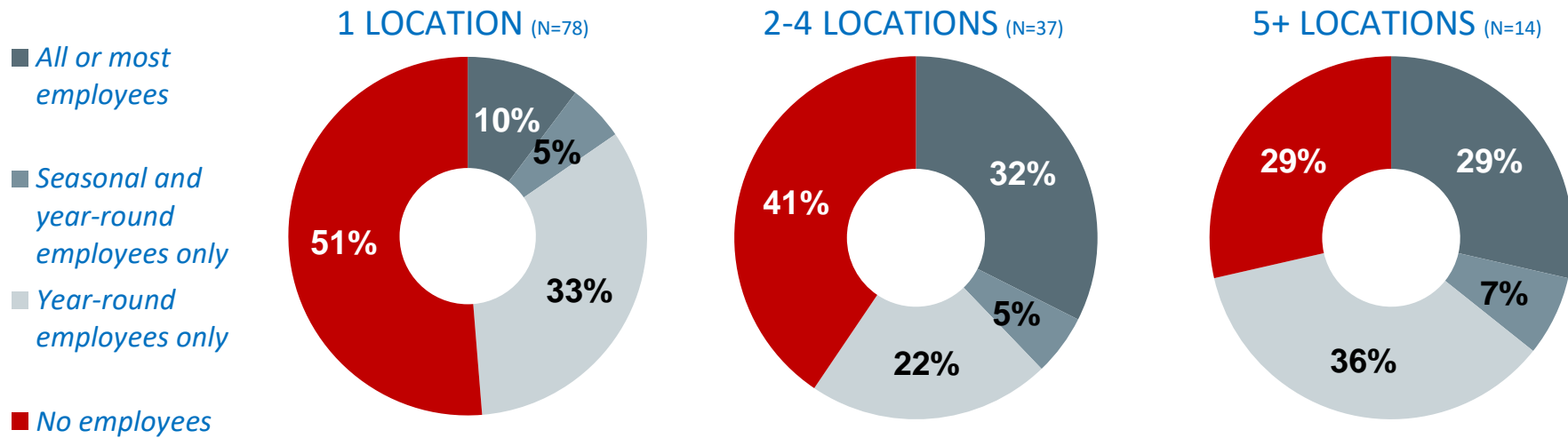


Average match: **3.1%**

Retirement Benefits – by Size

Larger firms are much more likely to provide retirement benefits – and when they do, to all rather than some of their workers

WORKERS RECEIVING RETIREMENT BENEFITS

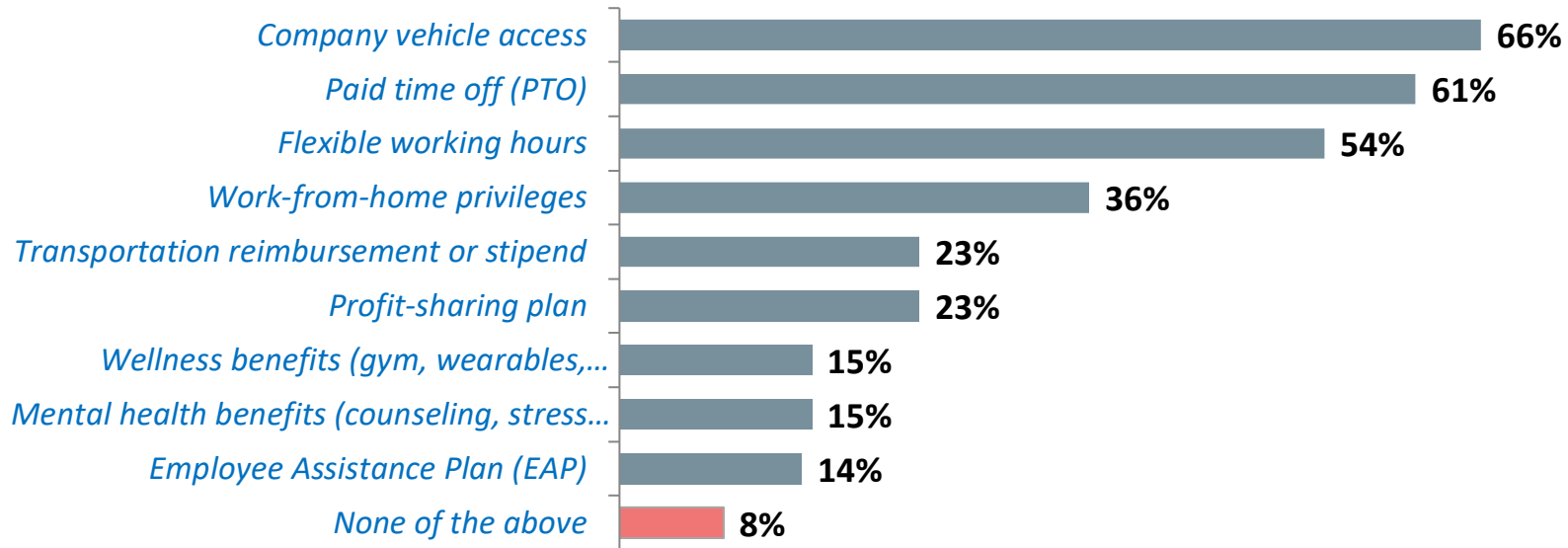


Workplace Perks

Among other types of benefits, 2/3 of S&I firms offer **PTO** or a company-provided **vehicle**, a majority enable **flexible hours**, but few offer other perks

- Wellness (e.g., gym), mental health benefits, or an EAP are uncommon, and nearly 1 in 10 firms offer no additional perks at all

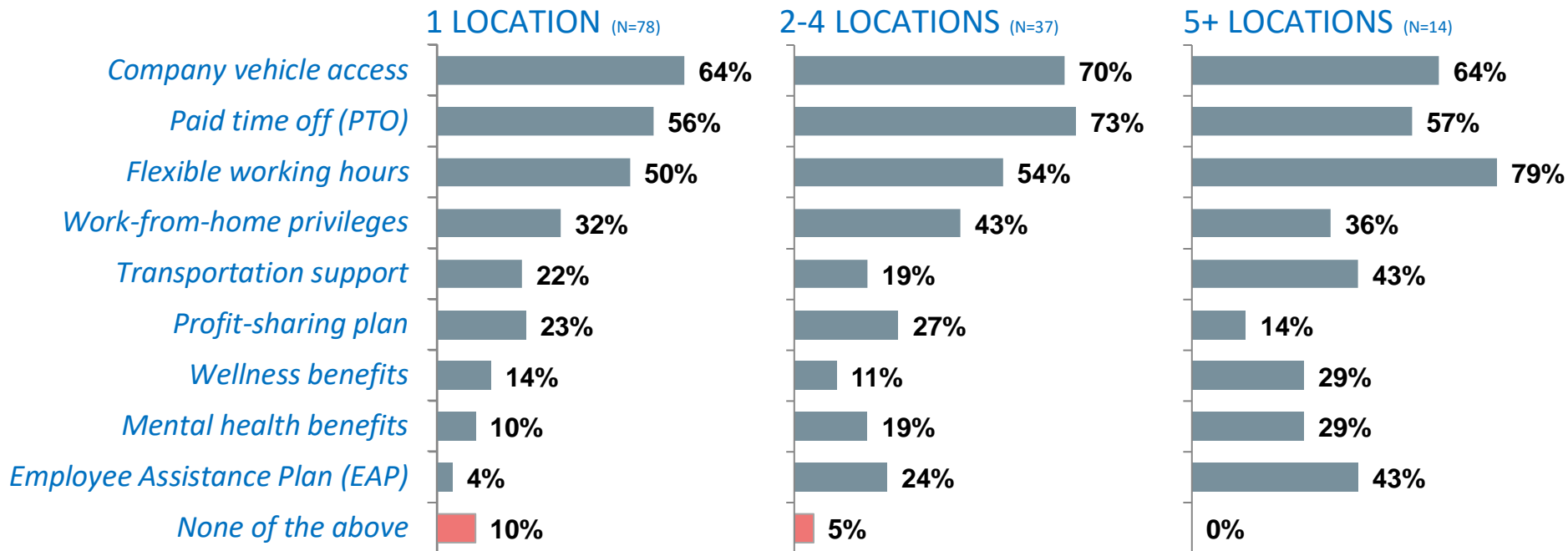
ADDITIONAL BENEFITS
(N=129)



Q: Which of the following additional benefits does your company offer?

Workplace Perks – by Size

Likelihood to offer benefits such as vehicle, PTO and WFH is fairly constant, while Large firms are more apt to offer many more



Q: Which of the following additional benefits does your company offer?

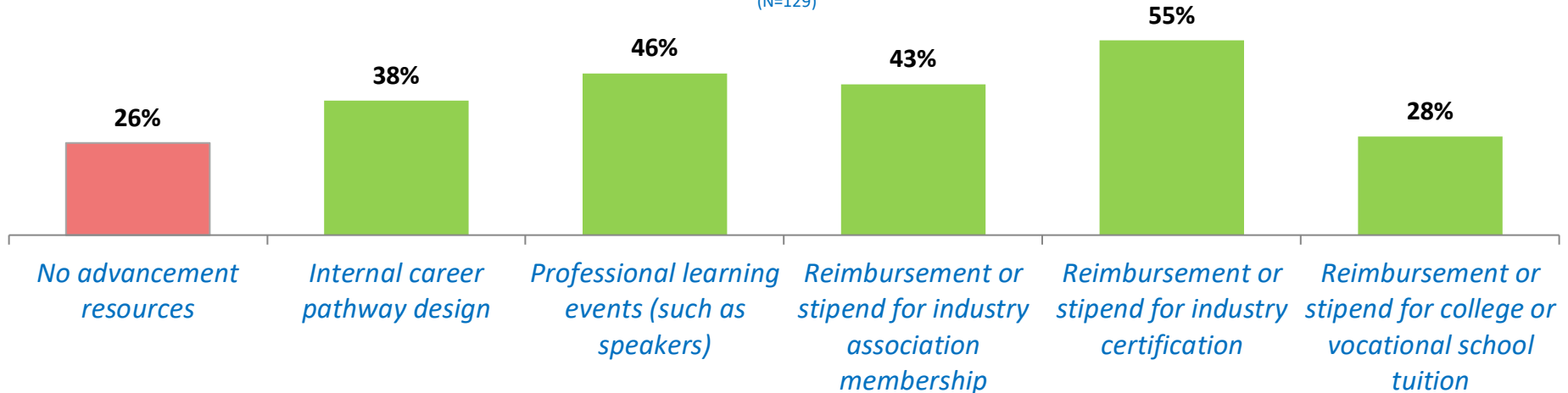
Career Development

Among career advancement resources, 1 in 4 S&I firms do not provide anything – among those that do, industry certification is most common

- Nearly half host professional learning events or help pay for association dues, while over 1/3 have designed formal career pathways, and 1 in 4 help pay for additional education

CAREER ADVANCEMENT RESOURCES

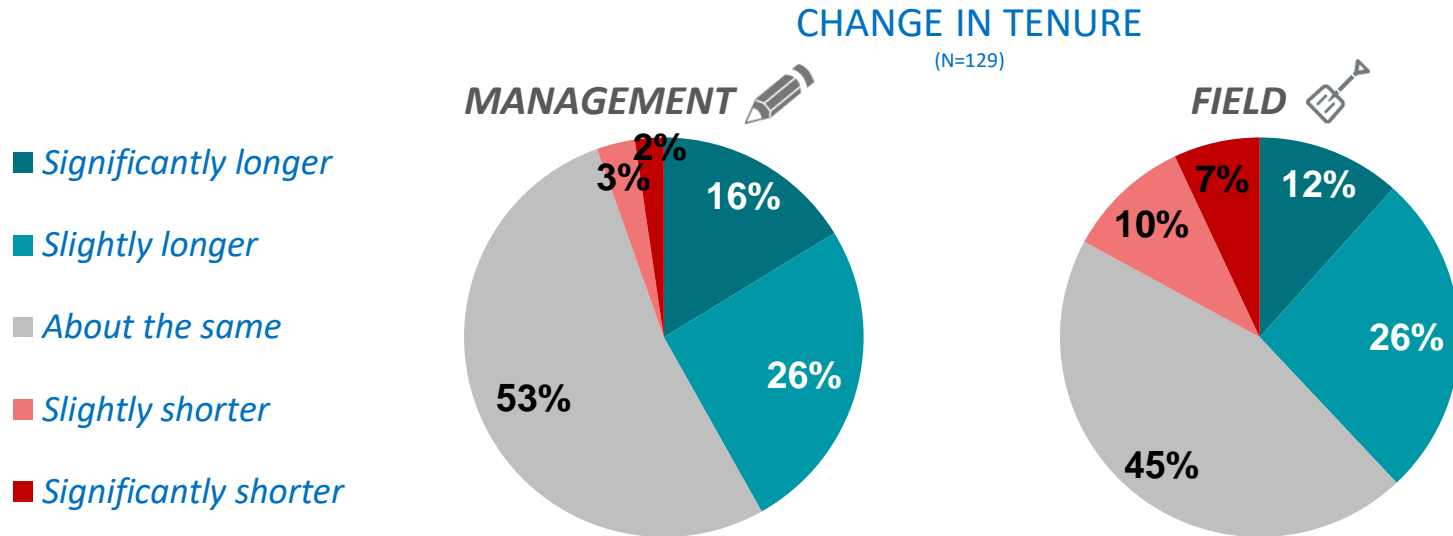
(N=129)



Employee Tenure

Across both types of roles, S&I firms report longer employee tenure

- 42% say that management professionals are staying longer, and 38% say that field workers are staying longer



Positive Culture Drivers

Elements of strong cultures range from choosing good people and paying them well to purposeful focus, strong values, leading by example, and more

FREQUENCY

- Hiring & Retention** (15%/ 19)
 - Choiceful decisions; Weeding out poor performers or bad attitudes
- Values** (12%/ 16)
 - Prioritizing respect, accountability, ethics, positivity
- Intentionality** (12%/ 15)
 - Focusing on firm culture and how to improve it
- Pay** (12%/ 15)
 - Fair or better wages; Performance incentives; Same-day payment
- Leadership** (9%/ 12)
 - Demonstrating/ leading by example; Change in leadership
- Investments**(9%/ 11)
 - Better or top-of-the-line equipment; Improved internal systems
- Teamwork** (8%/ 10)
 - Demonstrating or nurturing can-do, helpful attitudes
- Training** (8%/ 10)
 - Investing in training (to improve safety, work experience)
- Advancement** (5%/ 7)
 - Demonstrating path to promotion; Career planning

- Others include:*
- Events that promote bonding, teamwork
 - Adequate staffing levels [prevents burnout]
 - Expanding from seasonal to year-round business model [improves retention]

Negative Culture Drivers

Culture can be adversely impacted by bad apples, suppressing wages, or – due to unpredictability of snow events – over-staffing or under-staffing

FREQUENCY ↑

Attitudes (9%/ 12 mentions)

- Poor dispositions (which may be contagious)
- Lack of accountability

Turnover (4%/ 5)

- Churn hinders ability to form cohesive culture

Over-Staffing (4%/ 5)

- Too many workers, not enough hours to go around
- Internal competition for assignments

Pay (4%/ 5)

- Salaries paid not keeping up with market rates
- Jealousy/resentment of competitors' pay

Nature of Work (3%/ 4)

- Low snow seasons, or intense storms, can lead to dissatisfaction

Burnout (3%/ 4)

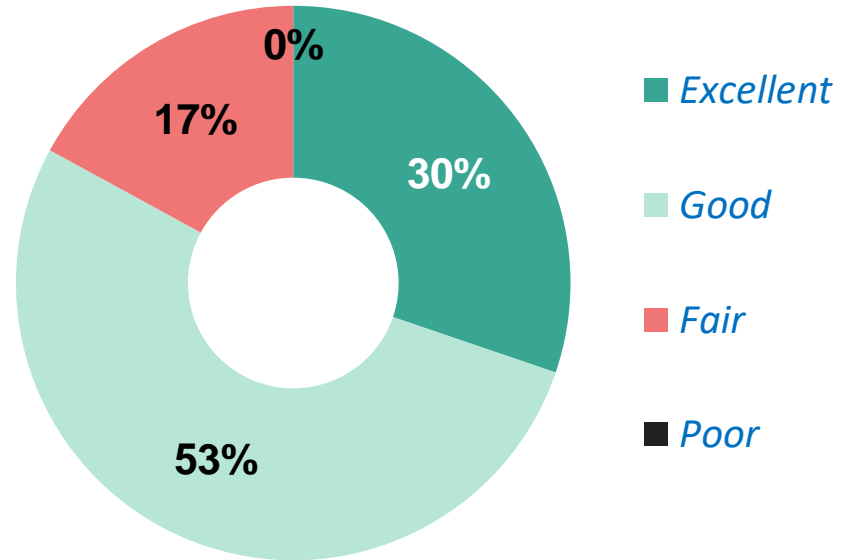
- Tenured employees getting tired of S&I work

- Others include:*
- Subpar equipment
 - Poor expectation-setting
 - Poor leadership
 - Short-staffing
 - Lack of structure/planning
 - Growth
 - World affairs (e.g., war, inflation)
 - Regulations

Self-reported, snow & ice firms indicate that their internal cultures are very positive

- Just 1 in 6 reports that their culture is “fair”, and none “poor”

WORKPLACE CULTURE SENTIMENT
(N=129)



Please complete the session survey. Thank you for joining us!

