





SIMA Webinar Series

SNOW & ICE WORKPLACE REPORT

with Steve Wolf, WolfWorks Consulting

Study Sponsor








Agenda

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

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Study Background



- 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

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Study Goals

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

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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**

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Topics and Methodology

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

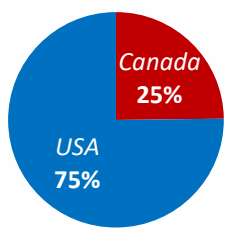
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Respondents

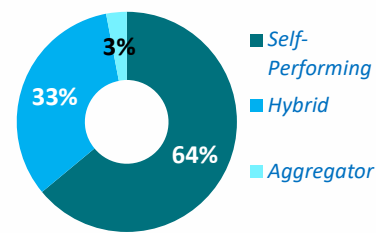
- 3 in 4 are American (mostly from Great Lakes, Mid-Atlantic, New England and Plains regions), 1 in 4 are Canadian
- 2/3 are self-performers, 1 in 3 are regional firms that utilize a network model, and a few are major national firms
- They have been in business for an average of **22 years**

REGION



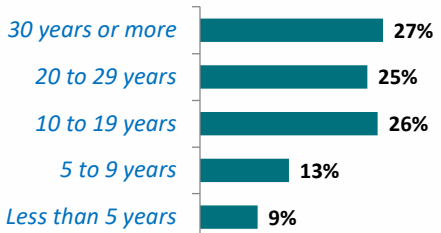
Region	Percentage
USA	75%
Canada	25%

OPERATING STRUCTURE





Operating Structure	Percentage
Self-Performing	64%
Hybrid	33%
Aggregator	3%

YEARS IN BUSINESS



Years in Business	Percentage
30 years or more	27%
20 to 29 years	25%
10 to 19 years	26%
5 to 9 years	13%
Less than 5 years	9%

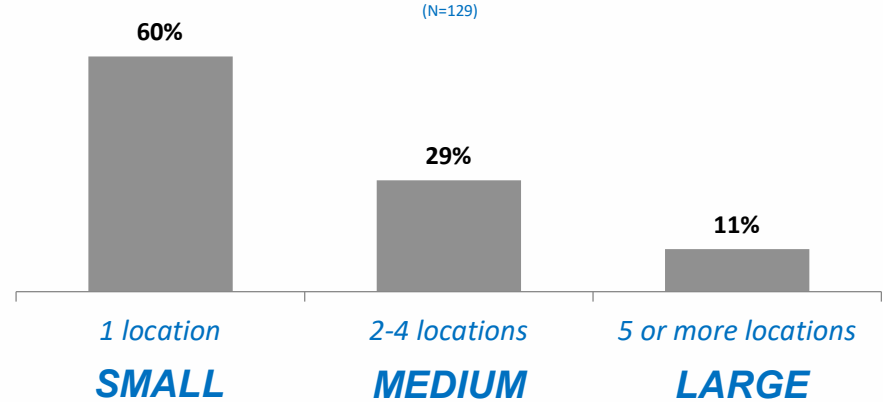
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Approximate Firm Sizing

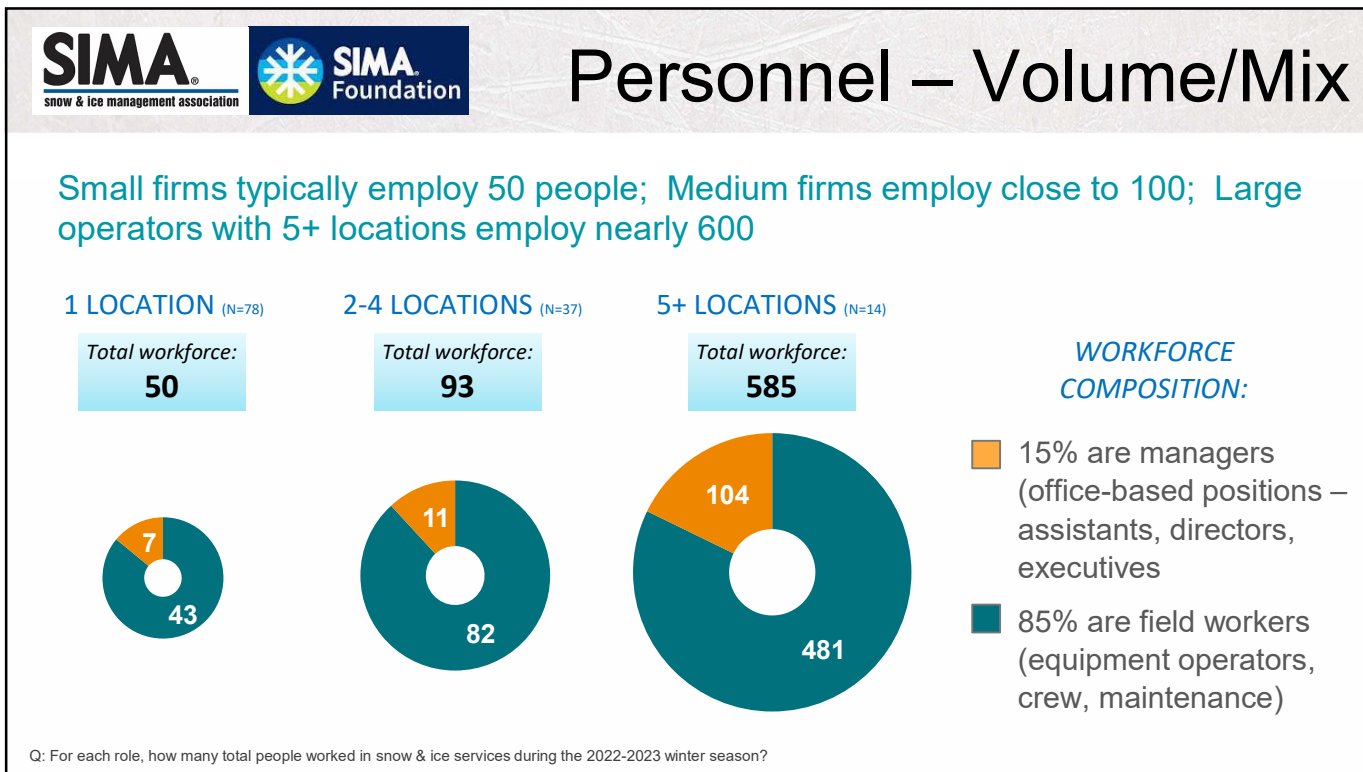
Survey analysis is organized for Small, Medium and Large providers, using reported # locations as a proxy for firm size:

LOCATIONS
(N=129)

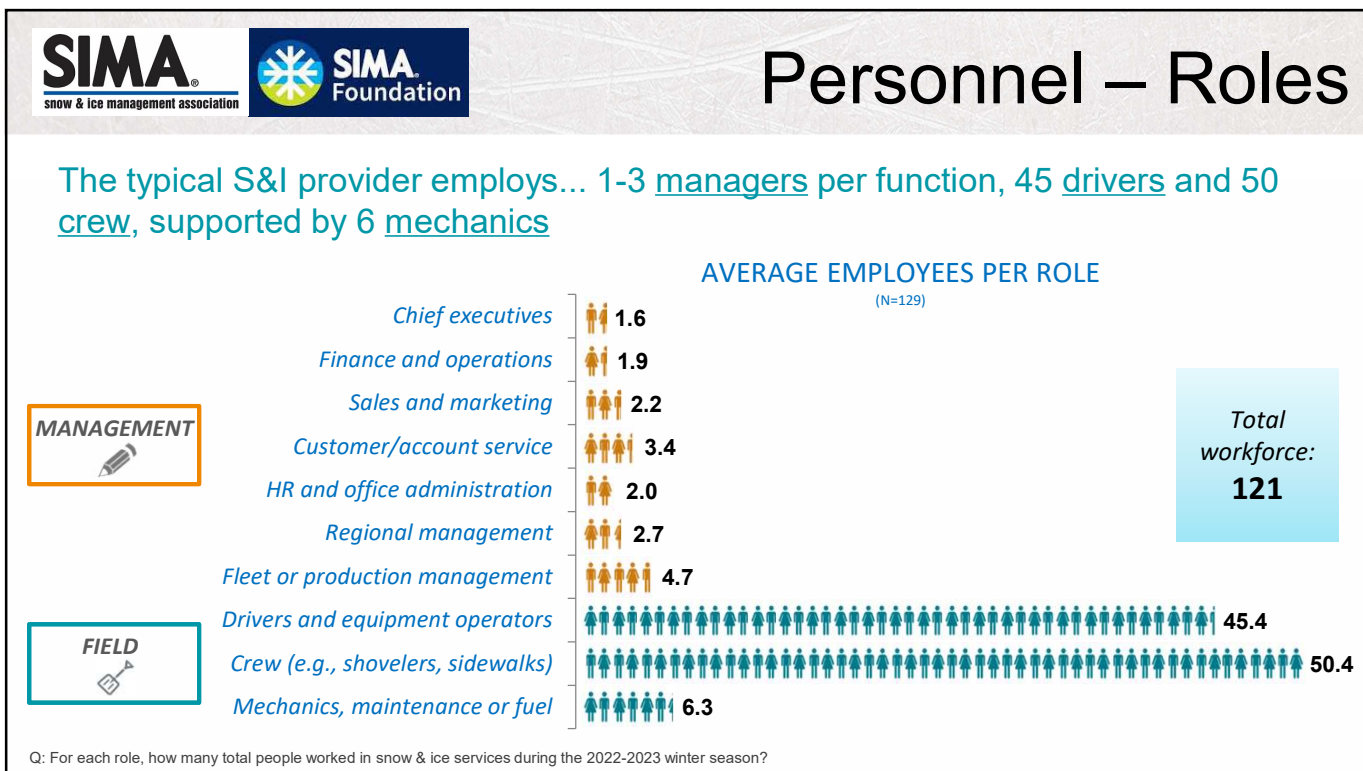


Firm Size	Percentage
SMALL (1 location)	60%
MEDIUM (2-4 locations)	29%
LARGE (5 or more locations)	11%

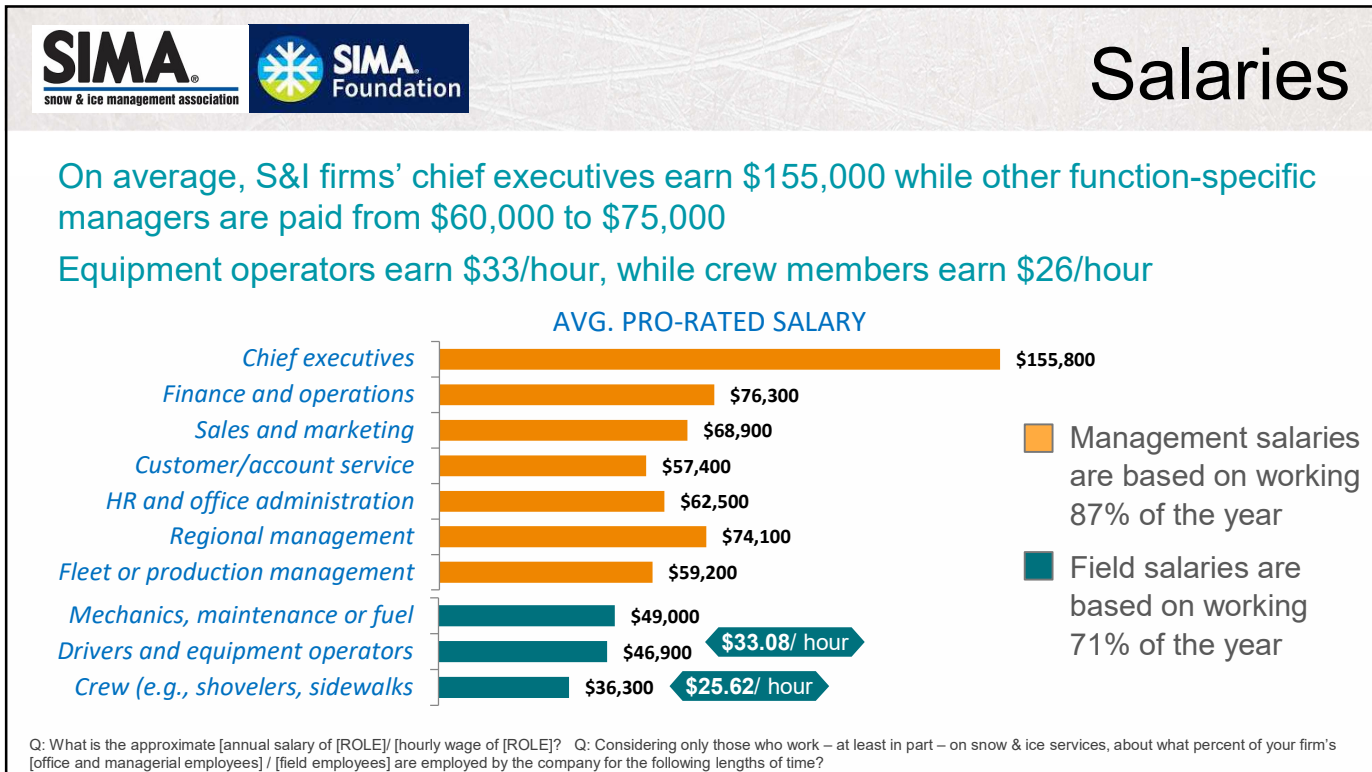
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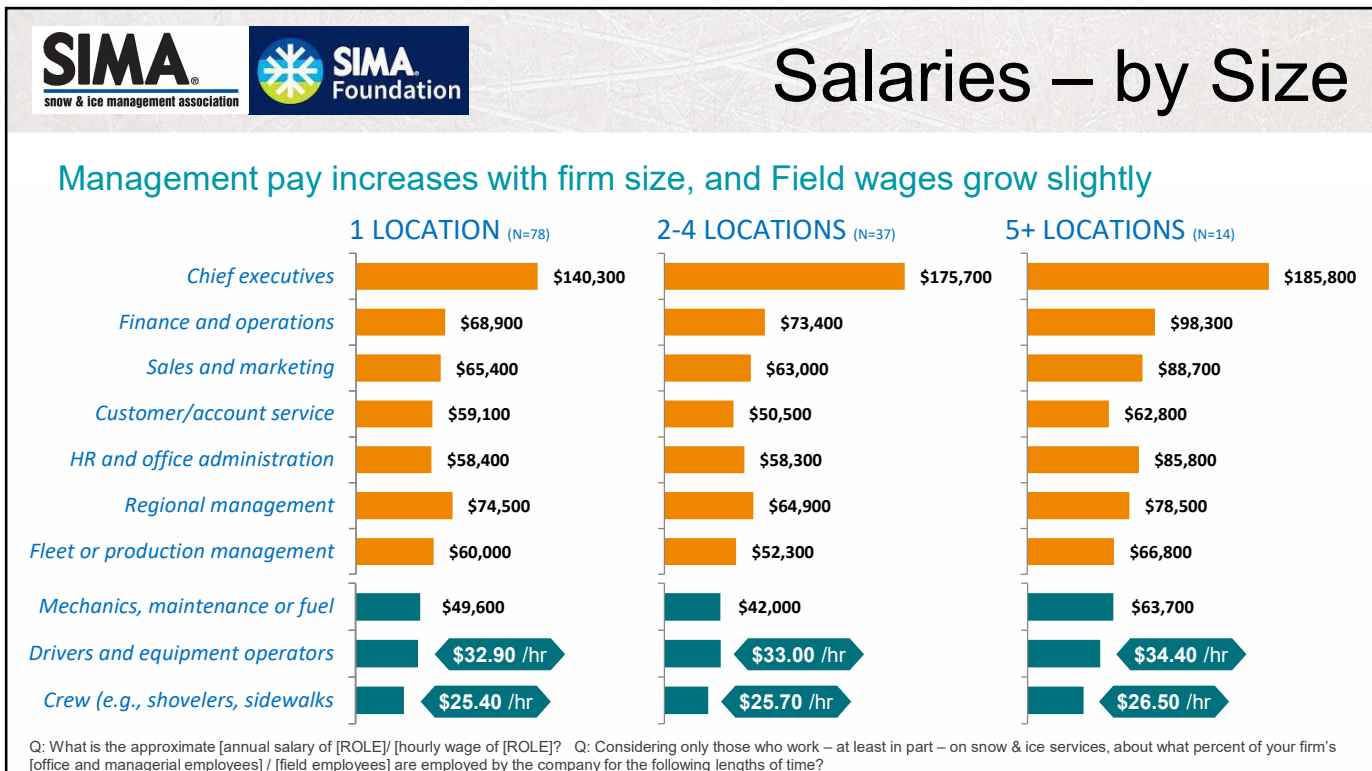
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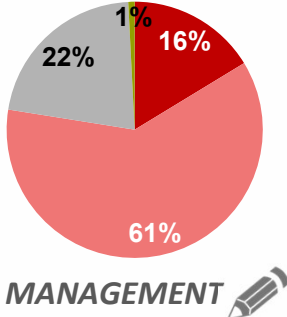
Salary Trend

Wages have been on the rise lately, often substantially

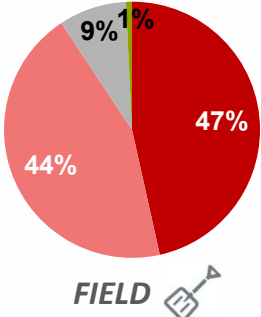
- **77%** report that management salaries are “significantly ” or “slightly” higher lately
- Field pay hikes are even more extreme – **90%** report they are higher now than 2-3 years ago

CHANGE IN SALARY
(N=129)

MANAGEMENT





FIELD



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

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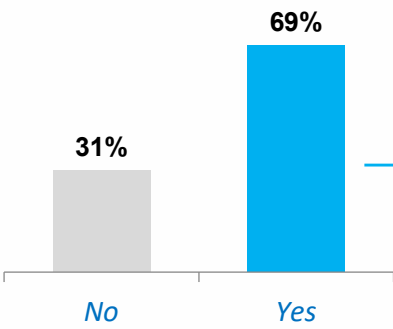



Subcontractors

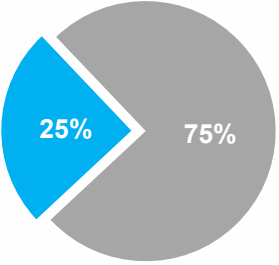
In addition to their own employees, 17% of S&I services are fulfilled by subs

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

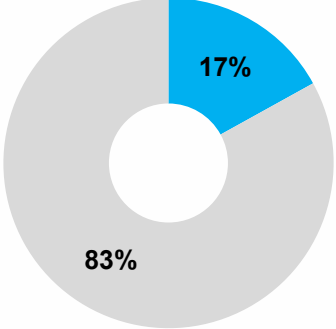
USE OF SUBCONTRACTORS
(N=129)



% SERVICES FULFILLED BY SUBCONTRACTORS
(N=89)

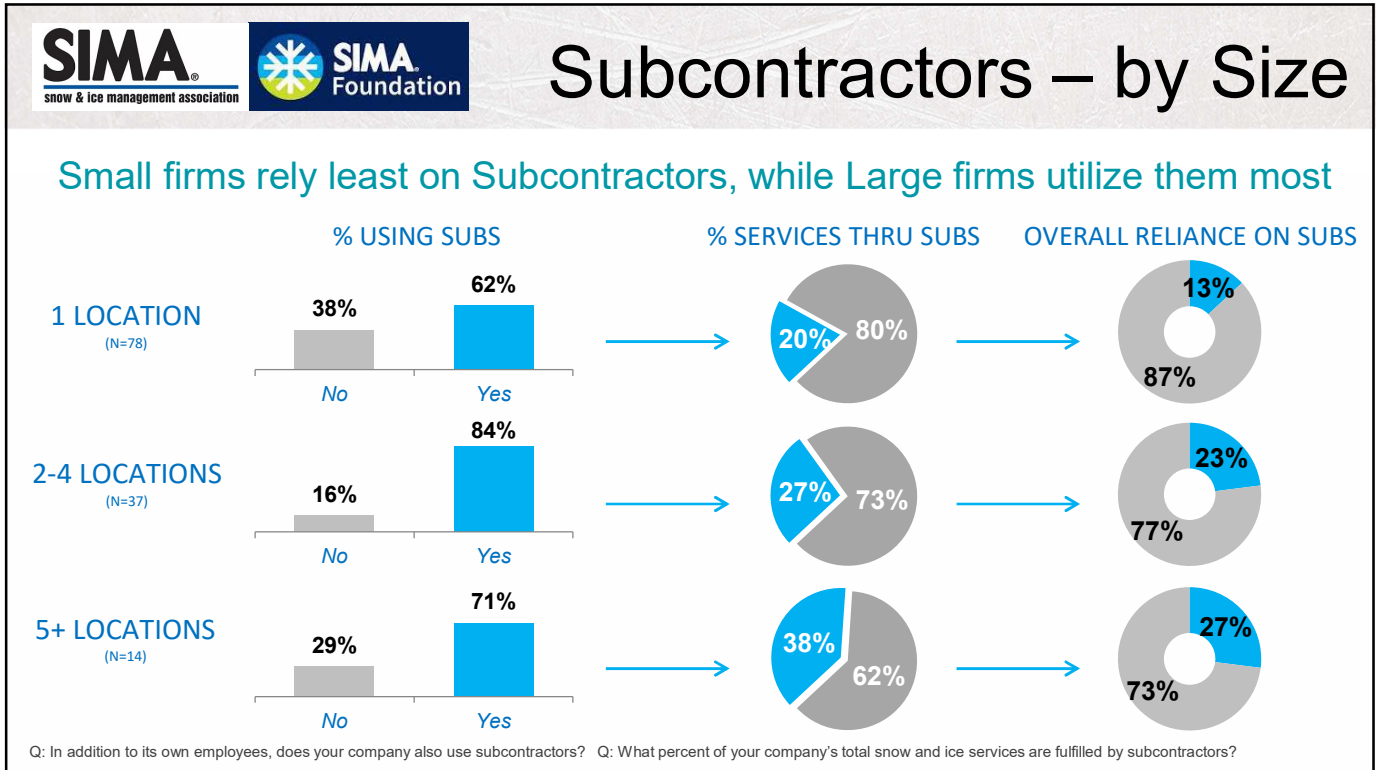


OVERALL RELIANCE ON SUBCONTRACTORS
(N=129)



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?

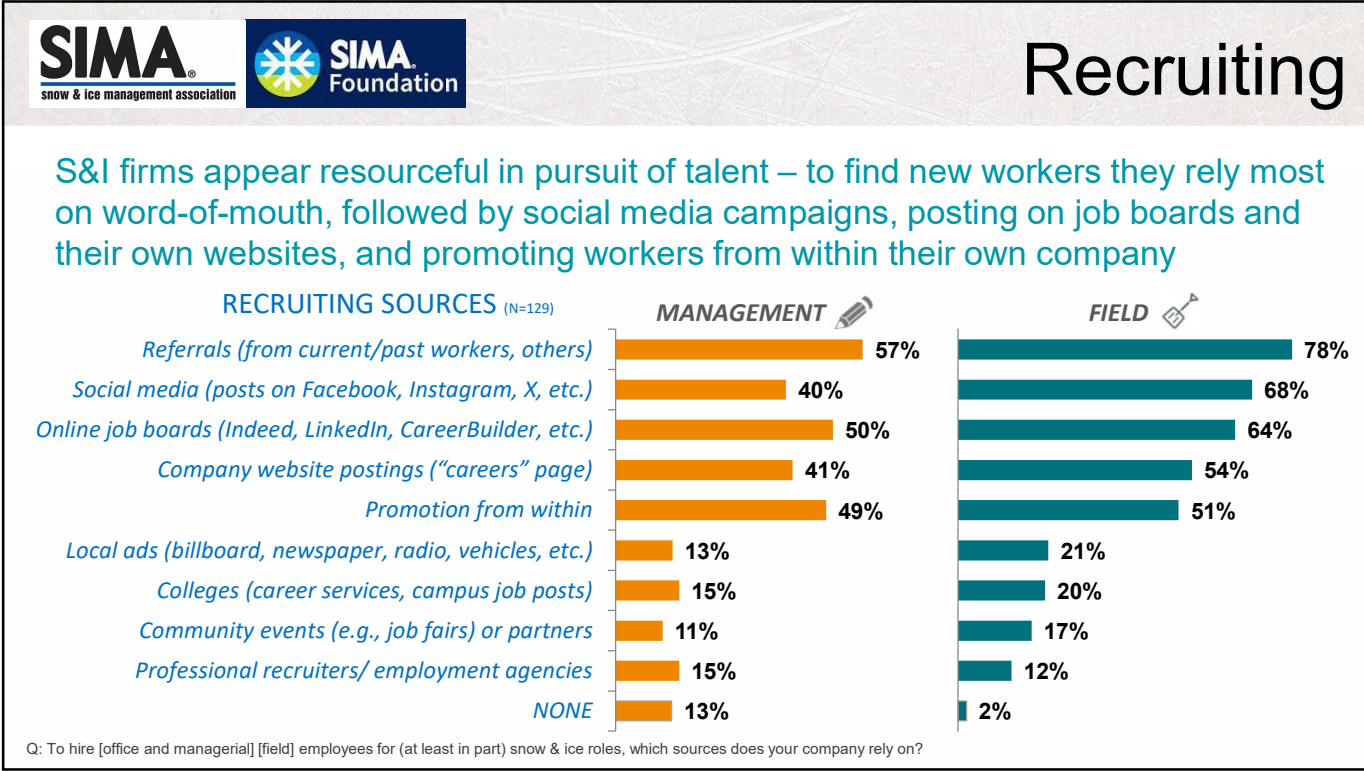
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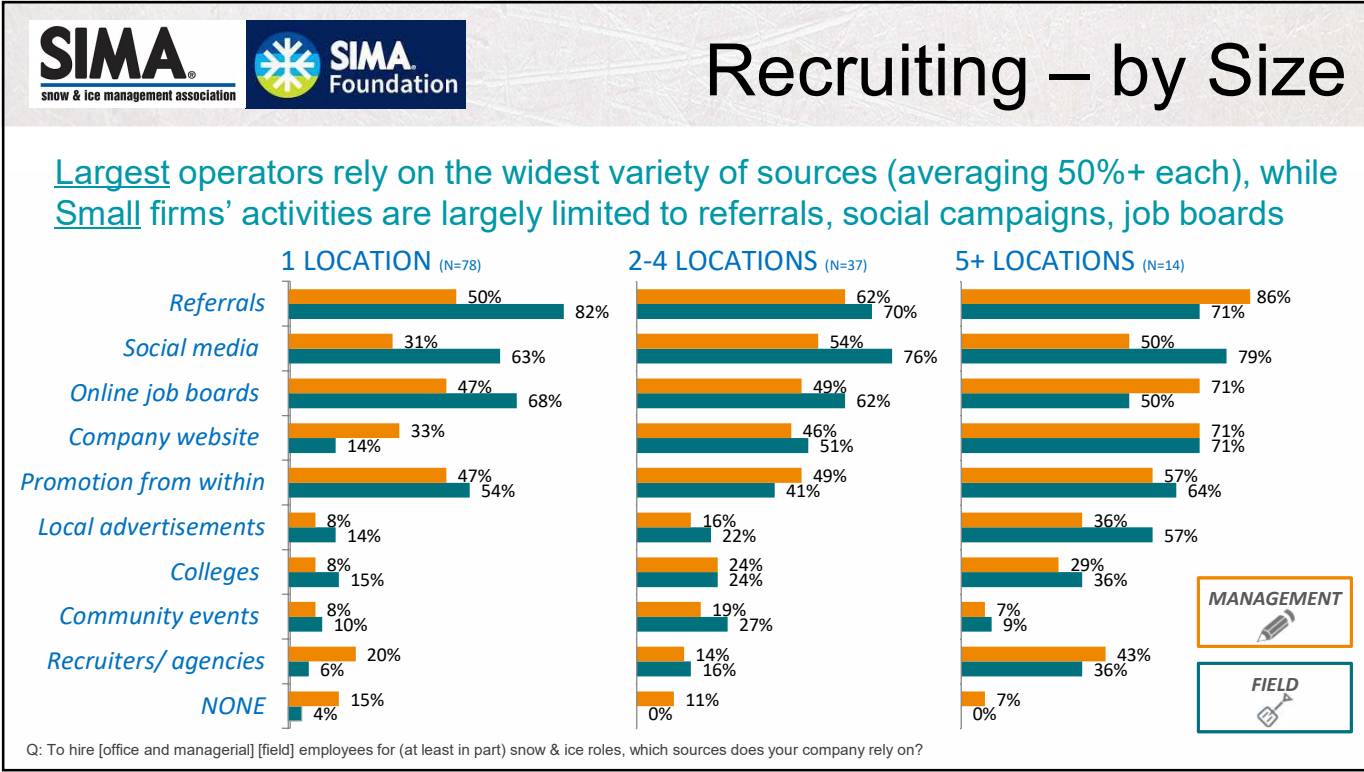
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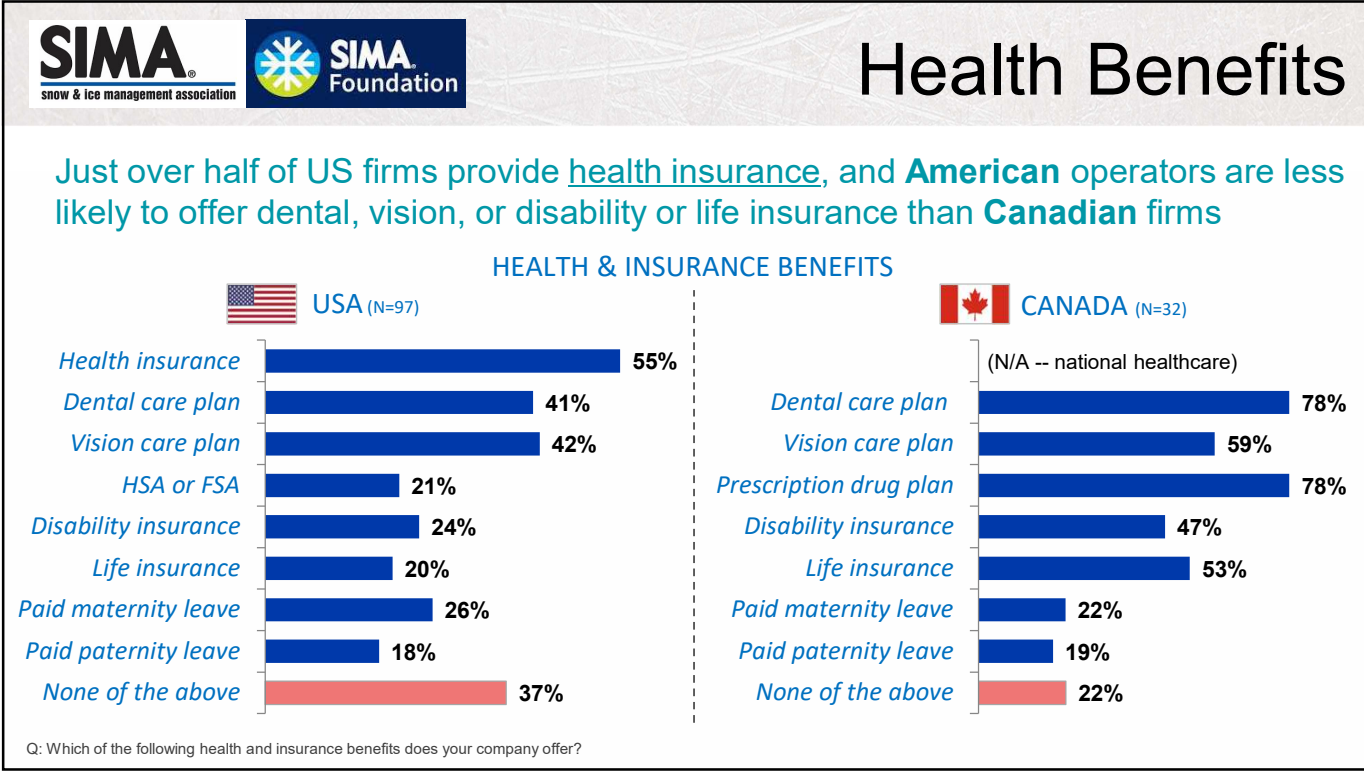
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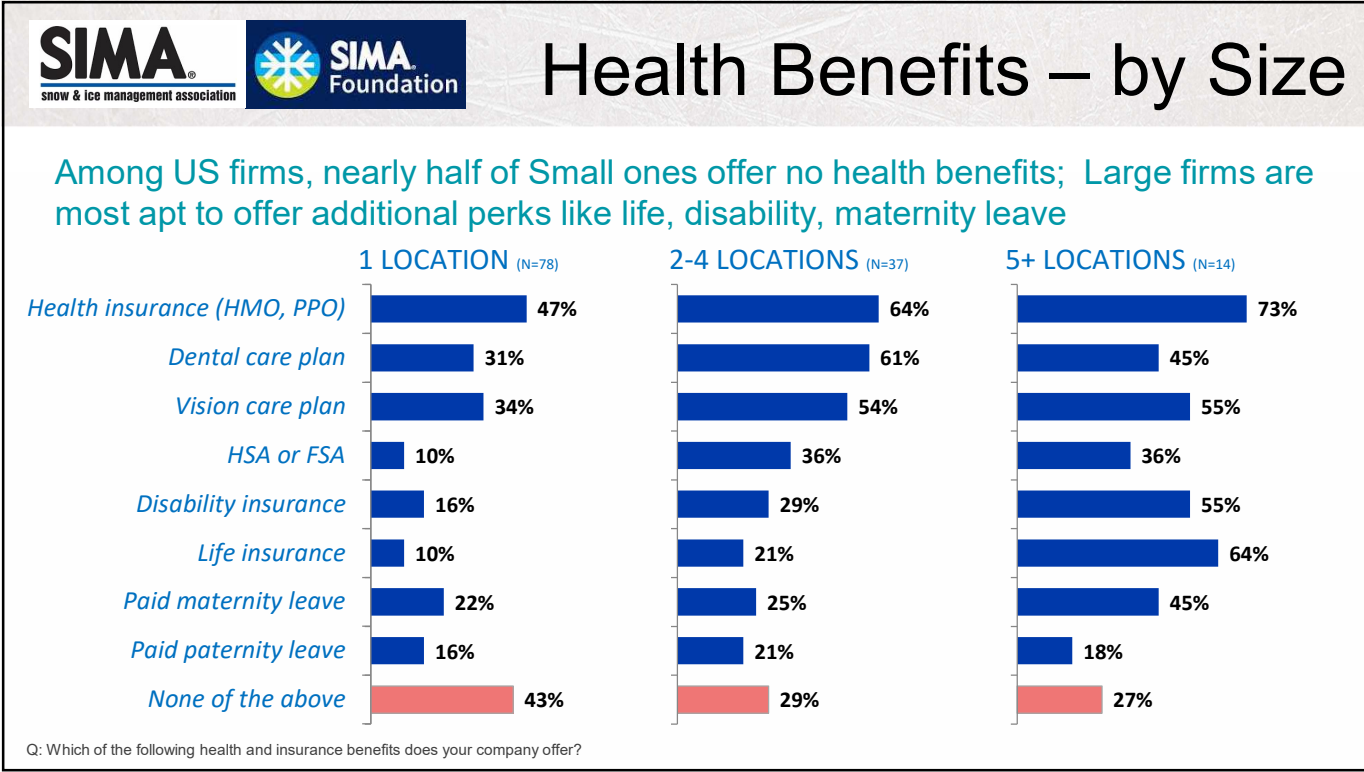
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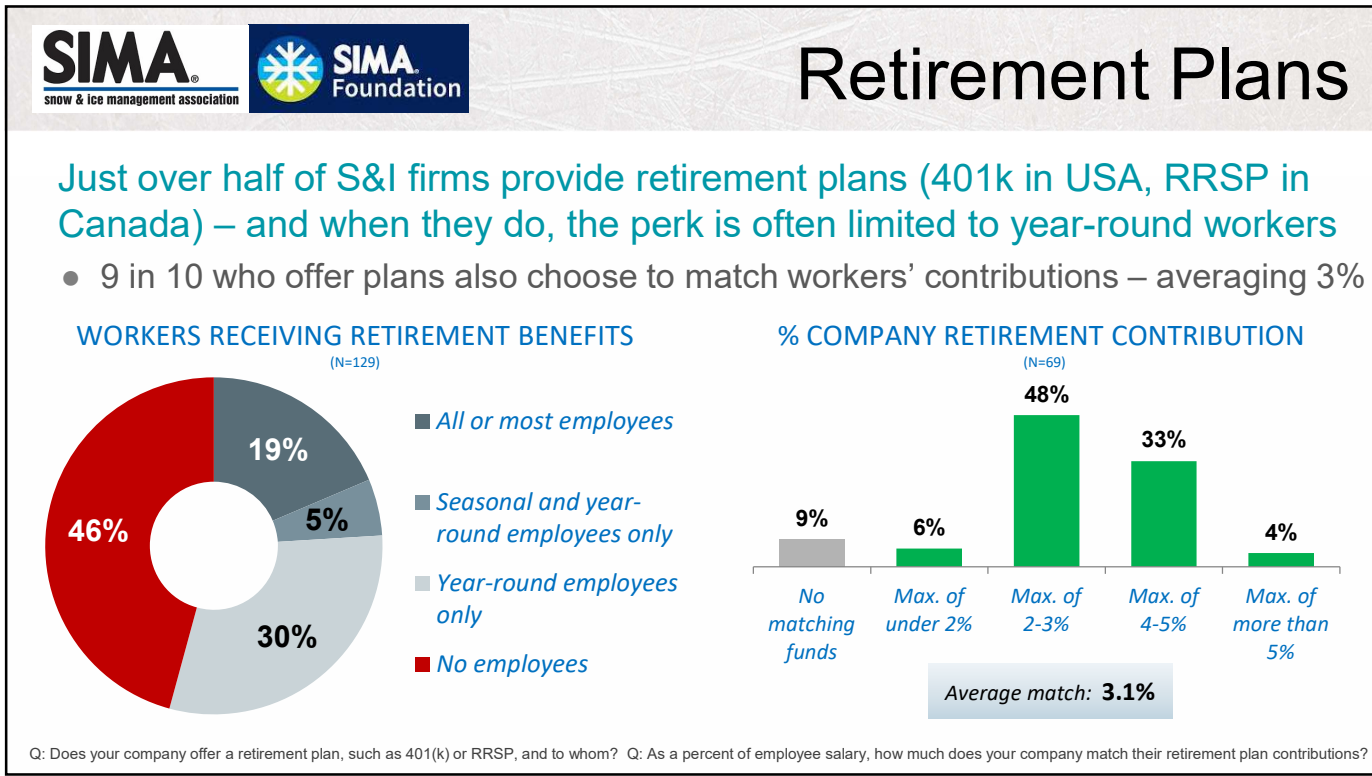
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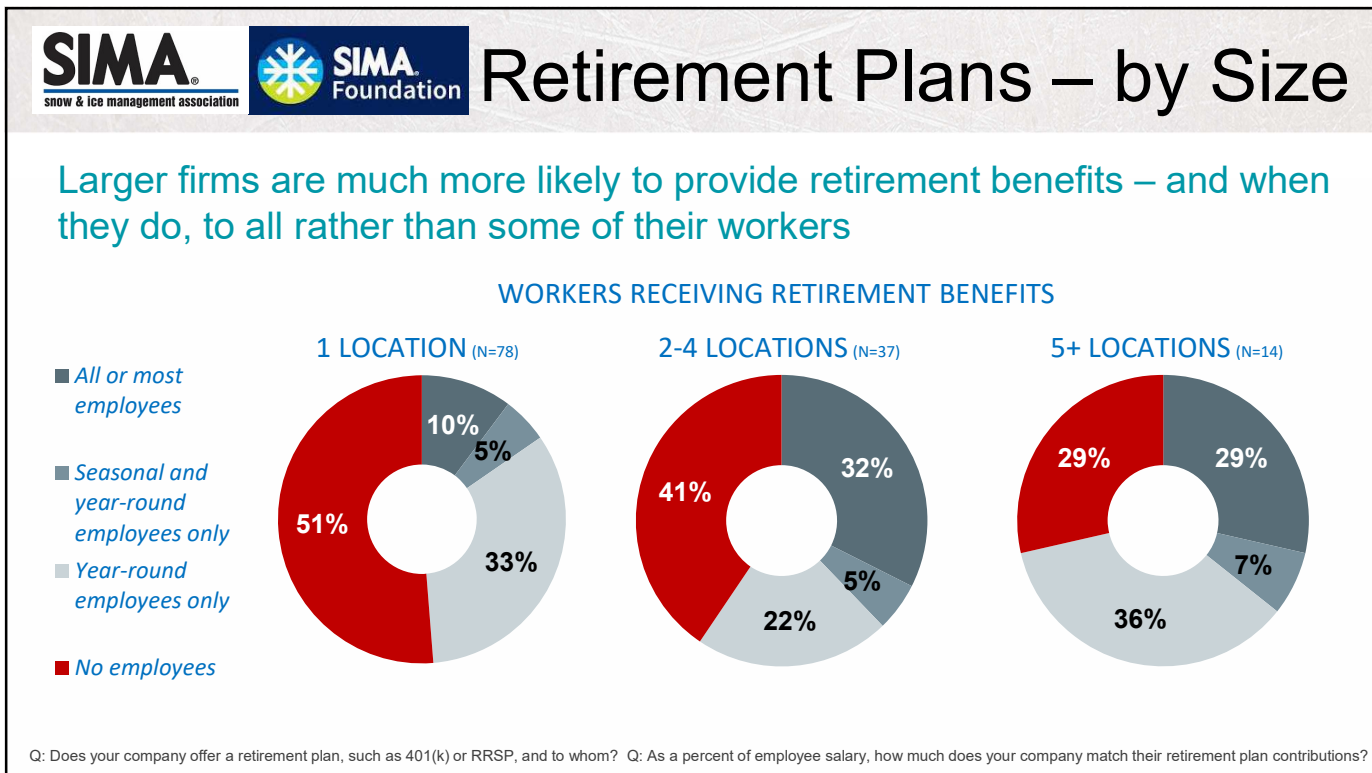
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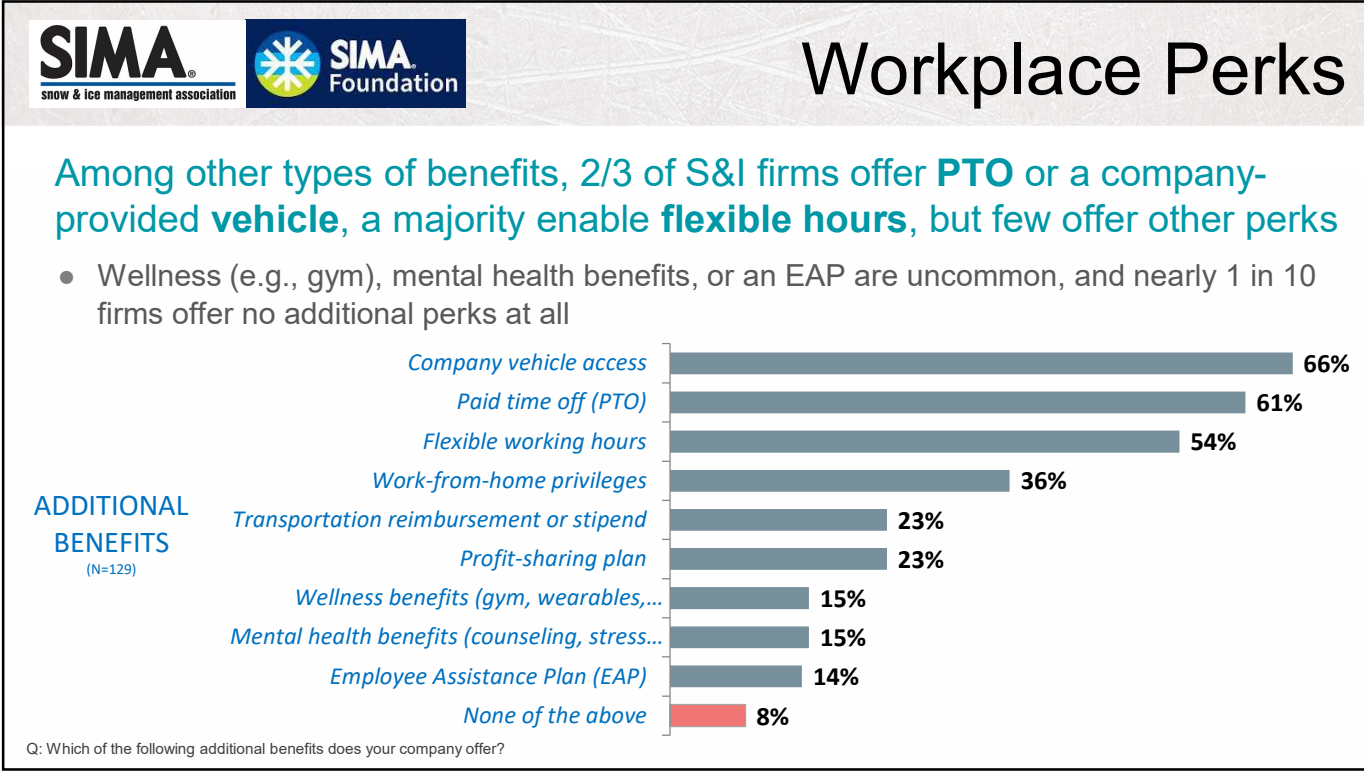
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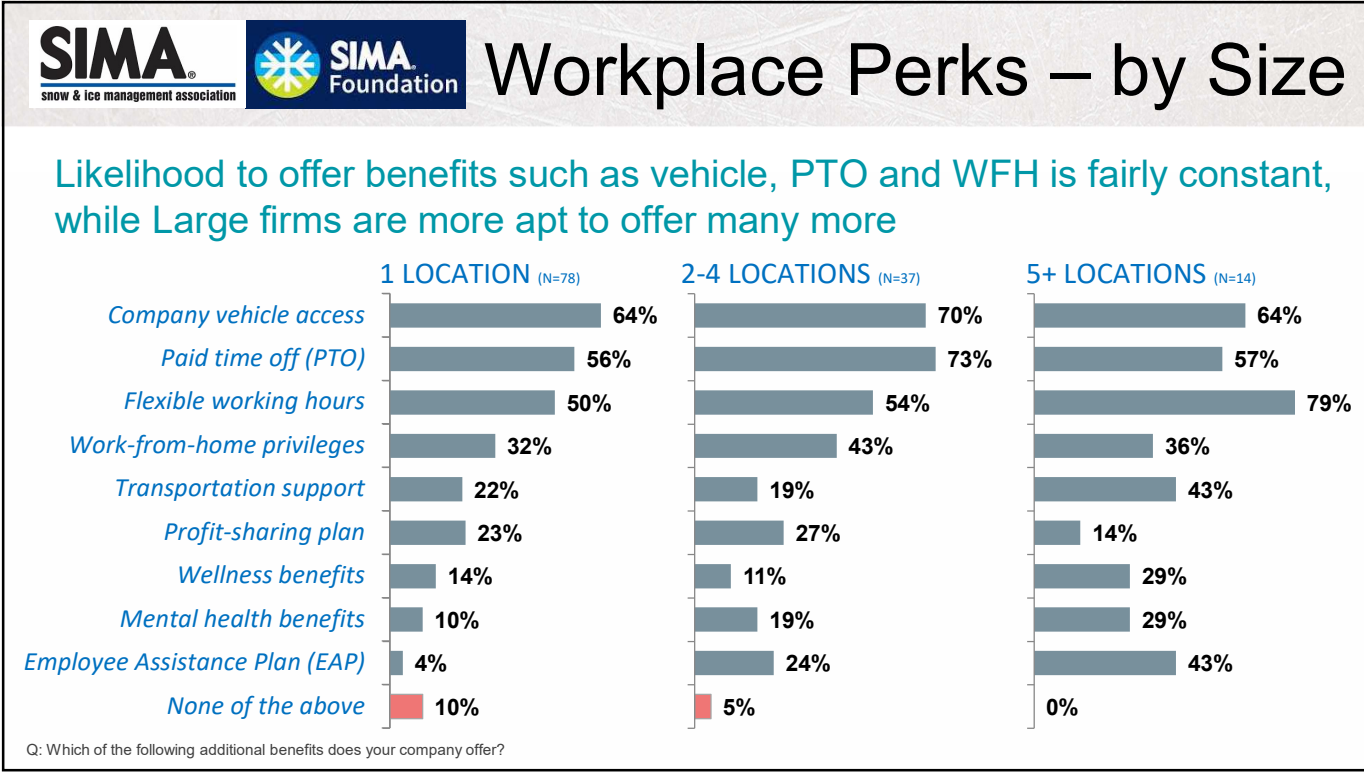
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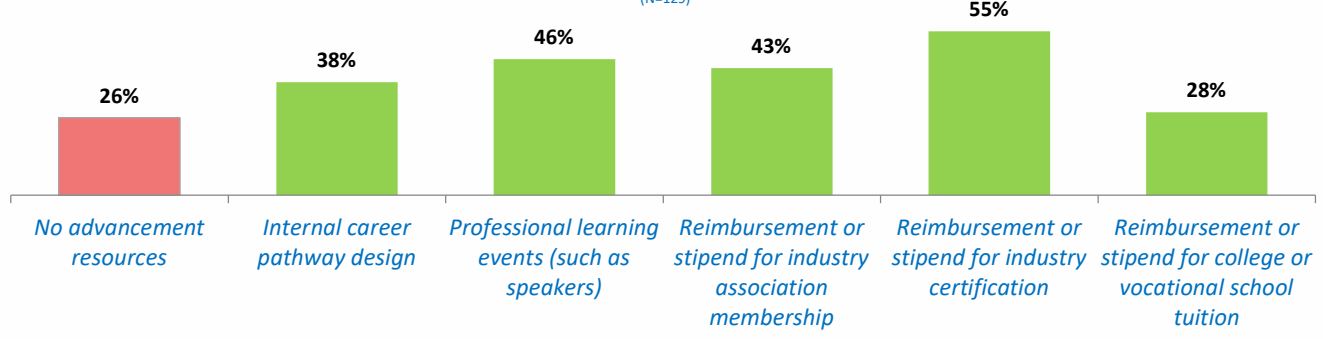


Career Development

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)



Q: What types of professional development or career advancement resources does your firm offer?

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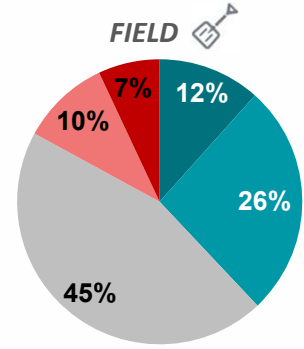
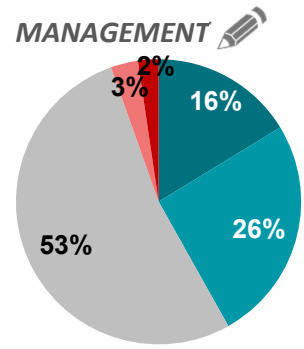
Employee Tenure

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

CHANGE IN TENURE (N=129)

- Significantly longer
- Slightly longer
- About the same
- Slightly shorter
- Significantly shorter



Q: How has their tenure with the firm changed over the past 2-3 years?


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Workplace Culture

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)

Sentiment	Percentage
Excellent	30%
Good	53%
Fair	17%
Poor	0%



Q: Considering only your snow & ice services, how would you describe the state of your company's culture?

Thank you for joining us!

For more information about this study, contact:

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