



2026 Landscaping Technology Trends Report

Why Busy Isn't Always Profitable





Methodology

To benchmark how software adoption correlates with business outcomes, Thrive Analytics surveyed 510 commercial landscaping professionals, including 254 Aspire customers and 256 users of competing platforms, from December 23, 2025, through January 19, 2026.

All respondents generate more than 50% of revenue in the commercial landscaping segment.

The study benchmarks operational practices, financial outcomes, and technology maturity, with a specific focus on how platform integration relates to profitability, efficiency, scalability, and competitive positioning. The following summarizes the results of the survey, with all stated metrics based solely on those who responded.

Executive Summary

The landscaping industry spent years chasing growth. More crews. More accounts. More revenue. And the logic made sense at the time: if you're busy, you're winning.

But busy isn't the same as profitable. Many contractors are figuring that out the hard way.

Labor costs are up. Supply chains are volatile. And the margin you thought you had on that contract? It quietly disappeared somewhere between the estimate and the invoice. You didn't find out until the month-end close.

That's the moment this industry is in right now.

59% of contractors plan to grow revenue in 2026. But 47% say increasing margins is now a top priority. Those two goals aren't always in conflict, but they require different systems to pursue simultaneously.

Among contractors still relying on manual tools, none in our survey sample reported profit margins above 15%. More than 50% believe their current setup will restrict their growth over the next five years. When reporting lags behind operations, you're trapped making decisions based on last month's data.





The contractors with a stronger outlook share a pattern: tighter system consolidation, shorter reporting cycles, and visibility into how a job is tracking before it closes. Enterprise platforms, including Aspire, which accounted for roughly half of our survey sample, show higher concentrations of these characteristics. But how deeply your tools are embedded into daily operations matters just as much as which tools you choose.

Just having technology doesn't mean you're improving operations. Almost half of contractors using software are still struggling with critical business functions such as scheduling and invoicing. Even among businesses with software, many have tools that live alongside their work rather than within it.

This report looks at where the industry actually stands heading into 2026 across tool maturity, efficiency, margin performance, and growth confidence.

ServiceTitan surveyed, through Thrive Analytics, 510 commercial landscaping professionals. The survey was conducted from December 23, 2025 to January 19, 2026. This report features forward-looking economic and industry outlooks that represent the views of the survey respondents, and may not represent the view of ServiceTitan or its affiliates.



Key Findings

- **When Revenue Grows Faster than Margin**

59% of contractors plan to grow revenue in 2026. But 47% say increasing margins is now a top priority. Those two goals require different systems to pursue simultaneously, and the data suggests most contractors aren't there yet.

- **When Software Exists but Doesn't Actually Work**

46% of contractors still struggle with scheduling, and 43% still struggle with invoicing, even with software in place. Among non-Aspire enterprise users, 43% lack estimating tools and 35% lack job costing. There's software, and then there's software that's embedded into every aspect of your operations. Guess which one makes an impact on your bottom line.

- **When the Reconciliation Never Ends**

Just saving time isn't enough. Spreadsheet users save less than 5 hours a week, and 45% of them report being slightly or not at all satisfied with their workflow. But contractors with optimized platforms are 5x more likely to save up to 20 hours, nearly half a full-time role, per week. Time reclaimed without adding headcount.

- **When Your Toolkit Has Too Many Pieces**

Among contractors on competing platforms, 17% manage 7 or more separate tools, nearly 50% more than the 11% of Aspire users in the same situation. Meanwhile, 65% of Aspire users rely on only 1–4 core systems. Fewer tools with deeper integration can correlate with higher margins and lower administrative overhead.

- **When Scale Starts to Feel Manageable**

Over 50% of spreadsheet users believe their current system will restrict future growth, and 40% forecast a decline in profits this year. Among contractors on integrated platforms, 79% feel prepared to scale over the next five years, and 49% forecast profit growth.



Chapter 1: When Growth Outruns Visibility

For a long time, the math felt simple. Win more contracts, add more crews, grow the top line. Profitability was something you'd sort out once the business got big enough to hire someone to worry about it.

That math doesn't work anymore.

Revenue growth is a goal for over half of contractors this year. But almost the same number also want to increase their margins. These twin priorities signal that the industry isn't abandoning growth. It's getting more careful about what growth actually costs.

And the data shows that costs are often invisible until it's too late to fix them.

Among contractors relying primarily on manual tools, none in our sample reported profit margins above 15%. Spreadsheet users cluster heavily in the 4–7% margin range, with only 9% reaching above 11%. That's not a ceiling you hit because you're not working hard enough. It's a ceiling you hit because your tools can't show you where the money is going fast enough to do anything about it.

Think about what happens at the end of a busy season. You've run more jobs than ever. Your crews have been flat out since March. You sit down to look at the numbers expecting them to reflect all that effort. Sometimes they do. But sometimes you find out that three of your biggest contracts quietly bled margin all summer through pricing that didn't account for fuel increases, change orders that never got billed, and labor hours that ran over on jobs you thought were going fine. You didn't know because your job costing was updated at month-end, not mid-job.

That's the visibility problem. It compounds as you grow.

Every new crew, every new account, every new season adds another layer of data that manual systems weren't designed to carry. Administrative complexity scales alongside revenue. Financial insight lags further behind operational activity. By the time you see the problem in a report, you're already two months into the next job, making the same mistake.

Contractors who deeply integrate software platforms into their operations, such as Aspire users, show a different margin distribution. A fifth achieve profit margins over 11%. General enterprise platforms show wider variance, with clusters at both the low and high ends, suggesting less consistent cost control across their user base.

The pattern across the data points is the same: margin consistency correlates with how quickly financial data reflects what's happening in the field. Not which software you're running, but how deeply it's connected to the work.





Chapter 2:

When Software Isn't Embedded in the Work Day

Most contractors have more technology than they did five years ago. But more tools don't mean better operations. For many businesses, the gap between installation and optimization is where the real problem lies.

Consider that almost half of contractors are still struggling with core business functions despite the software. These aren't edge cases or small businesses that haven't caught up yet. They're contractors across the industry, many with software already in place, still wrestling with functions that should be table stakes.

So what's going on?

The issue isn't that contractors picked the wrong tool. It's that the tool never got fully embedded into how work actually gets done. Scheduling lives in one system. Invoicing lives in another. Job costing is something the office manager exports into a spreadsheet every Friday afternoon and emails around, if they have the time. Everyone's working hard, but nobody has the full picture.

Among non-Aspire enterprise users, 43% report lacking estimating tools, and 35% report lacking job costing. Those aren't minor gaps. They're the two functions most directly connected to margin control.

When estimating operates separately from job costing, you're pricing work based on assumptions you can't verify against real performance data. When job costing updates happen after a job closes rather than during it, course correction to protect profit isn't an option.

45% of spreadsheet users report being slightly or not at all satisfied with their current workflow. That number makes sense when you consider what those workflows actually look like at scale. A spreadsheet that worked fine when you were running four crews starts to crack when you're running twelve. Not because spreadsheets are bad tools, but because they were never designed to be an operating system for a complex field service business.

And satisfaction isn't just about convenience. It's a signal about capacity. A team that spends significant time on manual workarounds isn't spending that time estimating new work, managing crews, or fixing problems before they become expensive.

The contractors showing stronger operational outcomes share a common characteristic: their software isn't something they log into to record what already happened. It's something their whole organization, from field crews to leadership, is working on in something close to real time. That shift in how a tool gets used turns out to matter more than which tool gets chosen.



Chapter 3: When Your People Become the Integration Layer

When systems don't connect, someone has to connect them. That someone is usually your best people, the ones you can least afford to have doing data entry.

This is what fragmented operations actually cost. Not the software subscriptions, but the time humans spend bridging gaps that should close automatically.

Manual-tool users often appear to run lean, with fewer systems and simpler setup. But underneath that simplicity is usually a spreadsheet doing the work that integrated software should be doing. Route data gets exported and re-keyed. Job costs get manually matched to invoices. Month-end close turns into a reconciliation marathon that nobody budgeted time for.



**Every transfer is another opportunity for error.
Every error is another hour of someone's week.**

Some enterprise users haven't fully escaped this either. 17% of users of non-Aspire enterprise platforms still manage 7 or more tools. That's not streamlined operations. It's software sprawl with a higher price tag.

65% of contractors on consolidated platforms use only 1-4 core systems.

With software deeply integrated into every aspect of operations, enterprise contractors are able to consistently report higher margins, stronger forecasting, and lower administrative overhead. When estimating, scheduling, job costing, and invoicing are all drawing from the same data, you stop spending energy reconciling versions of the truth and start spending it on the work itself.





Picture your accounting team the week after a big push, such as the week after a major commercial property's spring cleanup wrapped up across six locations. They're not reviewing performance. They're matching invoices to job codes, chasing down cost allocations that didn't transfer correctly, and correcting labor hours that got logged to the wrong site. All work that doesn't generate revenue. Instead, it consumes skilled people, delays reporting, and pushes financial visibility further into the past.

As organizations scale, that reconciliation burden compounds. Administrative headcount often has to grow before operational efficiency does, not because the business needs more people, but because the systems do.

The contractors who avoid that trap aren't necessarily running fewer jobs or simpler operations. They've built their systems so that data flows through the business rather than being carried along by it.



We have seen efficiency and consistency across the platform in bidding work, estimating work, production scheduling, and profitability reporting because they are all speaking the same language.

— Peter Welch, CFO, HeartLand



Chapter 4: When Time Is Recovered Instead of Reconciled

Every contractor knows the feeling of a week that went sideways before it started. You meant to get ahead on estimates. You meant to review last month's job costs. Instead, you spent Tuesday fixing a scheduling conflict, Wednesday untangling an invoice dispute, and Thursday re-explaining to a client why their report looked different from last month's. By Friday, you're just trying to close the week.

That's not a discipline problem. It's a systems problem, and the data puts a number on it.

Manual-tool users typically save less than 5 hours per week through their current setup. You could do that by DoorDash-ing the coffee order instead of sending someone to pick it up. Contractors on optimized, integrated platforms are 5x more likely to save 11–20 hours per week. That's nearly half a full-time role, reclaimed without adding headcount.

Those hours don't disappear into a vacation. Contractors report reallocating them toward proposal development, field supervision, and margin analysis, the work that actually moves the business forward. The compounding effect of that reallocation over a full season is significant.

The workflow-level data backs this up. Across core operational functions, contractors on integrated platforms report meaningful time savings compared to other software users: 26% in route planning, 23% in scheduling, 22% in job costing, and 15% in estimating. No single number is dramatic on its own, but efficiency gains across every workflow add up. A few percentage points of improvement in each area compound into hours every week and weeks every year.

61% of Aspire users cite labor efficiency improvements as a top profit driver, the highest of any platform in the survey. Take a second to consider what that could mean for your business. Not revenue growth. Not new account wins. Labor efficiency. The thing that's hardest to see when you're in the middle of a busy season shows up as one of the clearest drivers of profit when contractors step back and evaluate it.

The broader point isn't about any single platform. It's about what happens when your systems are designed to return time to your team rather than consume it. Growth becomes less about adding capacity and more about using the capacity you already have.



Every year we've been on the system, we've made more money.
— Ben Collinsworth, Founder, Native Land Design



Chapter 5: When Scale Doesn't Feel Risky

There's a version of growth that feels like control. You know your margins before a job closes. You know your labor variance before it becomes a problem. You can take on a new commercial account without lying awake wondering if your systems can handle it.

And then there's the other version. The one where every new account is exciting and terrifying in equal measure because you're not totally sure your operation can absorb it without something breaking.

The data shows a stark split between the two experiences, and it closely tracks with system maturity.

The contractors who were attracted to the fast implementation and lean operation of spreadsheets are realizing, at a rate of more than half, that their current system will limit future growth. 40% forecast a decline in profits over the next year. These aren't contractors who've given up on their businesses. They're contractors who've run the numbers and don't like what they see coming.

The constraints they're describing are operational, not motivational. Reporting delays. Manual reconciliation. Limited forecasting visibility. As revenue grows, those friction points don't stay the same size. They grow with it. Hiring decisions get harder to evaluate. Pricing adjustments happen later than they should. Capital investments are made on the basis of incomplete information.





Among contractors on integrated platforms, the outlook shifts considerably. 79% feel mostly or fully prepared to scale over the next five years. 49% forecast profit growth. 61% identify their platform as a competitive advantage. Contractors who can see labor variances mid-cycle, compare estimated hours to actual production weekly, and review job margins before invoicing report greater stability and a stronger willingness to pursue new growth.

60% of Aspire users rate the platform’s innovation as industry-leading or above average, and 64% say it continues to evolve to meet their operational needs. Those numbers matter less as a product endorsement and more as an indicator of confidence. Contractors who believe their systems are keeping pace with their growth are more likely to invest in that growth.



Scale doesn't have to feel risky. But it will until your reporting catches up with your ambition.



The benefits we've seen from using Aspire have been so game-changing that I was unwilling to consider a buyer who wasn't on the same page. The fact that Yellowstone used the system was part of why we wanted to work with them.

— Ben Collinsworth, Founder, Native Land Design

When Visibility Makes the Difference

Revenue growth isn't the hard part anymore. Most contractors can figure out how to get busier. The harder question is whether you can see clearly enough, and early enough, to make sure that growth is actually worth it.

The data keeps pointing to the same place. Contractors who can see labor variances mid-cycle, compare estimated hours to actual production weekly, and review job margins before invoicing report stronger financial stability and greater confidence in their ability to scale. Contractors relying on end-of-month reporting cycles face a different reality: pricing adjustments, labor reallocations, and cost corrections happen later in the job lifecycle, when there's less room to maneuver.

None of our spreadsheet-using respondents broke through a 15% profit margin. 46% of contractors still struggle with basic scheduling. More than half of manual-tool users believe their current system will restrict their future growth. Contractors on manual tools save less than 5 hours a week, a ceiling that doesn't move no matter how hard the team works.

Those numbers aren't an indictment of effort. They're a description of what happens when good operators run systems that weren't built for the business they've become.

The contractors heading into 2026 with the most confidence share something more specific than a software subscription. They have reporting that reflects reality close to real time, systems that connect estimating to job costing to invoicing without a person bridging the gap, and visibility into performance while there's still time to act on it.

That's what this data is really measuring. Not which platform you're on, but how clearly you can see your own business, and whether you're seeing it in time to do something about it.



When you tell other contractors that you run Aspire, they know you're serious.
— John Caramanico, Jr., President, C. Caramanico & Sons



Aspire Software, a ServiceTitan company, offers business management software for landscape maintenance, landscape construction, and snow & ice management companies. Aspire's cloud-based SaaS solution helps field service companies manage, create, and execute against their business opportunities and challenges. Aspire helps contractors change the way they manage their business to enable them to provide better service, improve margins, and increase productivity.

Aspire is based in Chesterfield, MO.