

Kentley Insights

2021 Market Research Report

Florists

June 2021

Retail Report: 453110

Report Contents

3 Overview

4 Industry Snapshot - Revenue & Growth

5 Industry Snapshot - Costs & Profitability

Section One

REVENUE & GROWTH BENCHMARKS

7 Industry Growth Details

- Industry Revenues
- Number of Companies & Locations
- 2012-2020 Historical Figures
- Forecasts for 2021 and the Next 5 Years

8 Growth Benchmarks

- Revenue per Company & Location
- Locations per Company
- 2012-2020 Historical Figures
- Forecasts for 2021 and the Next 5 Years

9 Ecommerce Sales

- Total Ecommerce & % of Traditional Retail
- 2012-2020 Historical Figures
- Forecasts for 2021 and the Next 5 Years

10 Ecommerce Category Sales

- 2015 vs. 2020 Sales with Growth Rates

11 Breakdown of Product Lines

- Percentage of Revenue from Product Lines

12 Macro Retail Subsector Growth

- Sales and 5-Year CAGR

13 Income vs. Revenue Growth Matrix

- Retail Subsectors vs. Industry

14 Sales per Capita by State

- Sales per Capita and State Rankings

15 Sales as a % of Consumer Expenditures

- Sales as a % of Income and State Rankings

16 Sales per Location by State

- Sales per Location and State Rankings

17 Pricing & Inflation

- Annual Inflation - Indexed to 2010
- 2012-2020 Historical Figures
- Forecasts for 2021 and the Next 5 Years
- Monthly Inflation Figures for the Past 3-Years

18 Consolidation Analysis

- Number of Retailers by Business Size
- Number of Locations by Business Size
- Locations per Retailer by Business Size
- 2015 versus 2020

19 Employment by Business Size

- Number of Employees by Business Size
- Employees per Retailer by Business Size
- Employees per Location by Business Size
- 2015 versus 2020

20 Retail Subsector Consolidation Analysis

- Number of Retailers
- Number of Locations
- 3-Year CAGR

Report Contents (Continued)

21 Retail Subsector Consolidation Analysis

- Locations per Retailer
- Employees per Retailer
- 3-Year CAGR

Section Two

COST, FINANCIAL, & WORKFORCE BENCHMARKS

23 Profitability & Financial Ratio Analysis

- Percent of Companies that are Profitable
- Average Net Income as a Percent of Revenue
- Financial Ratios - 10 ratios, such as Total Asset Turnover, Assets to Liabilities, Return on Net Worth, Solvency Ratio

24 Operating Expenses

- Industry Operating Expenses
- Industry Revenue vs. Operating Expense Growth
- Operating Expense as a Percent of Revenue
- 2012-2020 Historical Figures
- Forecasts for 2021 and the Next 5 Years

25 Operating Expenses by Retailer & Location

- Operating Expenses per Retailer
- Operating Expenses per Location Expenses
- 2012-2020 Historical Figures
- Forecasts for 2021 and the Next 5 Years

26 Operating Expense Detail

- Employee Expenses
- Property Expenses
- Equipment Expenses
- IT Expenses
- Inventory Handling & Supplies Expenses
- Miscellaneous Expenses

27 Inventory Turns & Gross Margin

- Inventory Turns
- Gross Margin
- 2012-2020 Historical Figures
- Forecasts for 2021 and the Next 5 Years

28 Productivity & Industry Employment

- Revenue per Employee
- Total Industry Employees

28 - Continued

- Employees per Retailer
- 2012-2020 Historical Figures
- Forecasts for 2021 and the Next 5 Years

29 Employee Productivity by State

- Revenue per Employee and State Rankings

30 Industry Payroll

- Payroll per Employee, Retailer & Location
- 2012-2020 Historical Figures
- Forecasts for 2021 and the Next 5 Years

31 Payroll by Business Size

- Payroll per Retailer, Location & Employee
- 2015 versus 2020

32 Payroll per Employee by State

- Payroll per Employee and State Rankings

33 Workforce Composition

- Management & Finance
- Sales, Service & Marketing
- Operations, IT, & Other
- Percent of Industry's Employees

34 Job Categorization Pay Ranges

- Management & Finance
- Sales, Service & Marketing
- Operations
- Pay Bands

35 Detailed Workforce Composition

- Percent of Total Employees by Job
- Top 20 Job Categories

36 Pay Ranges of Top 20 Positions

- Pay Bands
- Median, Top & Bottom 10% & 25%

37 Total Employment by State

- # of Employees and State Rankings

38 Population to Every Employee by State

- # of Residents to Industry Employee
- State Rankings

Report Methodology

Our goal at Kentley Insights' is simple...provide leaders with the right insights to help them unlock value in their company. Everything we've done in creating this report is focused on this goal. This Kentley Insights' report on the Florists industry will provide you with all of the key insights and benchmarks you need to create a broad and in-depth diagnostic and understanding of any company in the industry.

To unlock the most value from this report, companies typically create a comprehensive fact base of metrics on their own business to compare to the benchmarks in this report. The gap analysis will highlight potential opportunities, spur the right questions, and drive deeper inquiry. The conversations created by our reports are often the starting point to a broader strategic debate for companies to crystalize their strategies to win.

The core data is generated from comprehensive data sets created by companies in the industry either through automated data collection or surveys on their business. Our analysts create the forecasts

Industry Definition

Florists

Florists include locations primarily engaged in selling cut flowers, floral arrangements, and potted plants purchased from others. These retailers typically prepare the arrangements they sell.

Industry Snapshot - Revenue & Growth

Below is the revenue and growth snapshot for the Florists industry, covering industry size, growth, forecasts, revenue per company, product line concentration, pricing, sales per capita, and sales per Location, and benchmark how many of these metrics compare to the industries within the service sector.

Overall Industry Size

The overall 2020 revenues of Florists was \$3.7 Billion. The industry is a relatively small industry, ranking in the bottom 20% of retail industries in terms of size.

Overall Industry Growth

Over the past 3 years, industry revenues have been shrinking at an annual rate of -8.1% per year. This growth rate significantly lags the average for retail industries and ranks it in the bottom 20% of all retail industries.

Overall Industry Growth Forecast

Given the macroeconomic climate and industry dynamics, the forecasted industry revenue growth rate for the next 5 years is 4% per year for the Florists industry.

Revenue per Retailer

In 2020, the average revenue per retailer for the industry was approximately \$.3 million, which declined at a -0.8% annual rate over the past 3 years.

Product Line Concentration

In the Florists industry, the top 3 product lines make up 75% of revenue versus 62% across retail sectors.

Pricing & Inflation

From 2019 to 2020, price inflation for the industry was -1.8%. While over the past 5 years, inflation has averaged 0.2% per year.

Sales per Capita

For the Florists industry, Delaware has the highest sales per capita at \$27. This is 61% higher than the average \$17 per capita across the U.S.

Sales per Location

For the industry, Hawaii has the highest sales per location at \$.4 million, which is -4% higher than the U.S. average of \$.3 million in sales per location.

Industry Snapshot - Costs, Capital & Profit

Below is an industry snapshot on operating expenses, employee productivity, payroll, job categorization, profitability, and relevant benchmarks.

Operating Expenses

In 2020, the operating expenses as a percent of revenue for the Florists industry was 40.8%, and over the past 3 years total operating expenses for the industry grew at -6.3% per year.

Operating Expense Breakdown

The breakdown of operating expenses for the industry is as follows: 48.9% for employee expenses, 19.7% for property expenses, 5.1% for equipment expenses, 2% for IT expenses, 4.5% for inventory handling and supplies expenses, while 8.3% was spent on miscellaneous expenses.

Inventory Turns and Gross Margin

In 2020, inventory turns for the industry were 3.1, which represented a growth of -12% over 2019. While in 2020, gross margin was 45.7%, versus 50.8% in 2019.

Employee Productivity

For the Florists industry in 2020 the sales per employee grew 15.1% over 2019 to \$99,097, which ranks the industry in the bottom 20% of retail industries.

Payroll per Employee

In 2020, payroll per employee equaled \$19,729 for the industry, which ranks it in the bottom 20% of retail industries. Payroll per employee has grown at an annual rate of 2.3% over the past 3 years.

Payroll by State

New York is the highest paying state in the Florists industry, with a payroll per employee of \$23,327, which is 18.6% higher than the U.S. average.

Job Categorization

The jobs breakdown in the Florists industry is as follows: 8.7% of the jobs are in management and finance, 70.9% of the jobs are in sales, service and marketing, while 20.4% of the jobs are in operations.

Profitability

58.5% of Companies in the Florists industry are profitable, with an average net income of 6.9% of revenues, which ranks the industry in the top 40% of retailers.

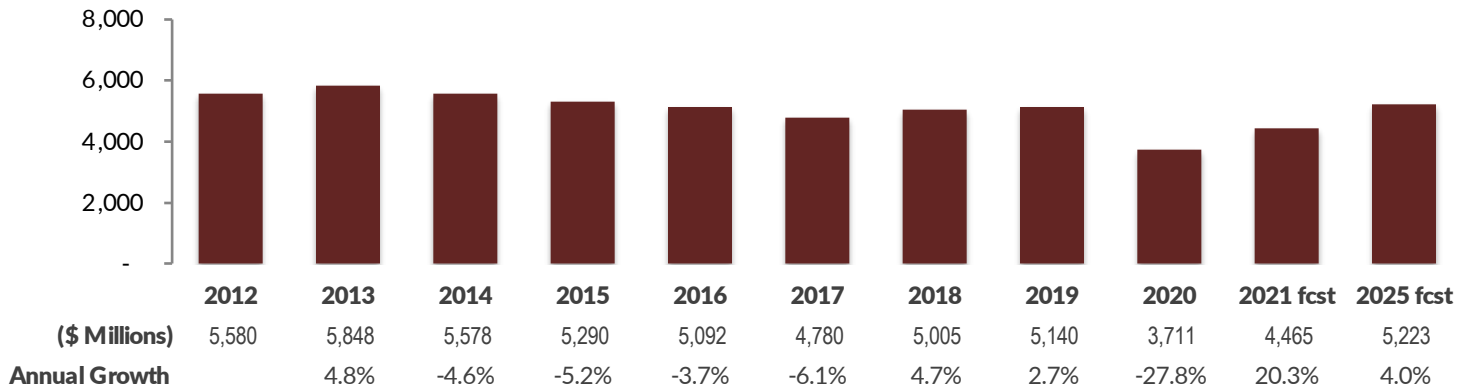
Section One

Revenue & Growth Benchmarks

Industry Growth Details

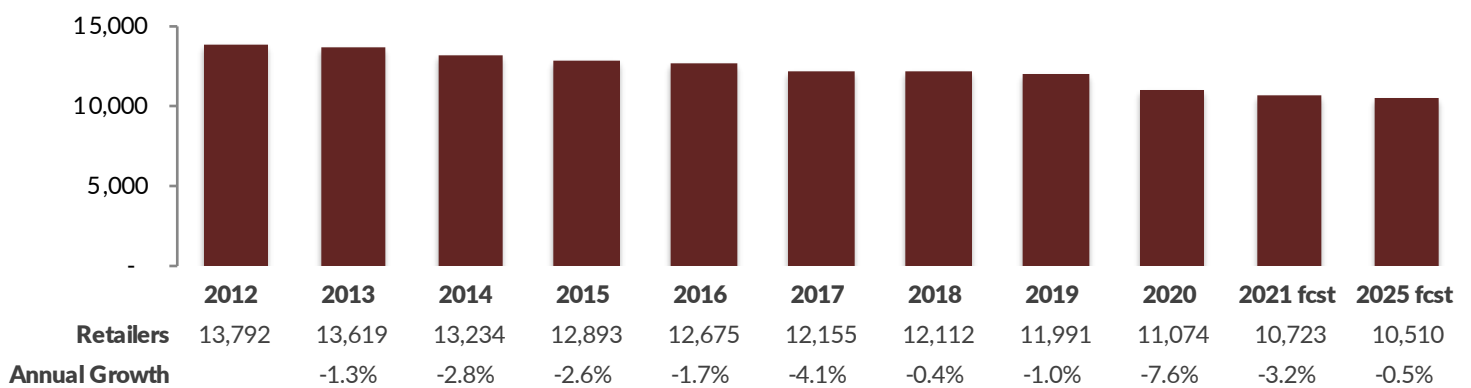
To get a macro level view of the industry, below are the historical details and forecasts of industry growth, including the total revenues of Florists and the number of retailers and locations in the industry.

Industry Revenue (\$ Millions)



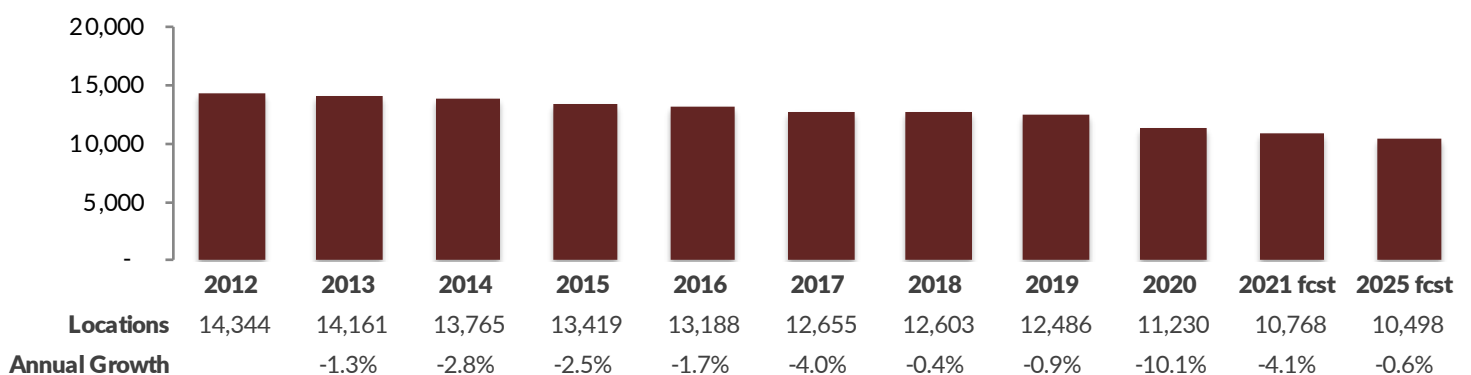
Compound Annual Growth Rate **-8.1%** 3-Year **-6.8%** 5-Year

Number of Retailers



Compound Annual Growth Rate **-3.1%** 3-Year **-3.0%** 5-Year

Number of Locations (i.e., separate facilities and locations)

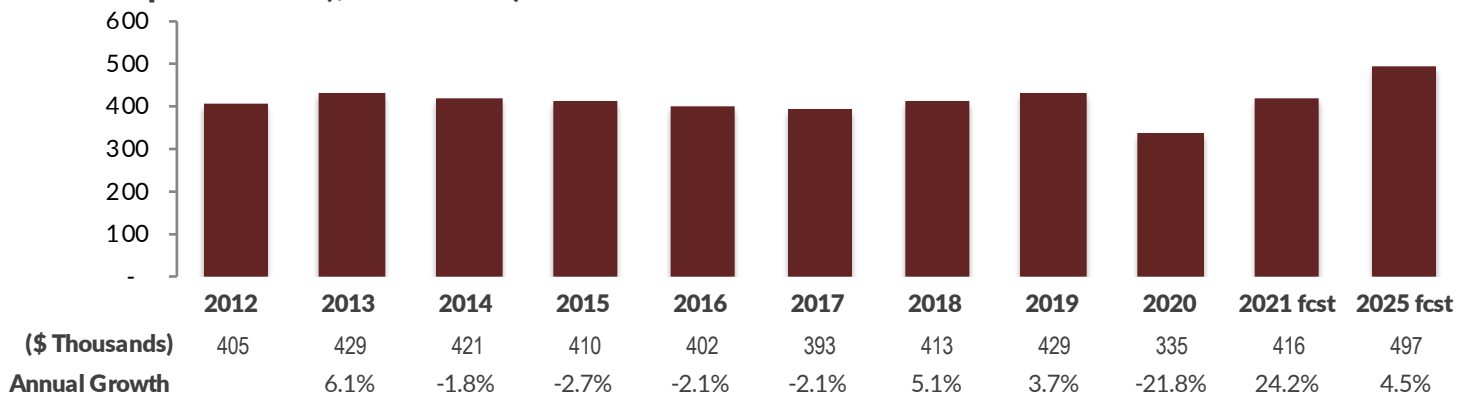


Compound Annual Growth Rate **-2.3%** 3-Year **-3.5%** 5-Year

Growth Benchmarks

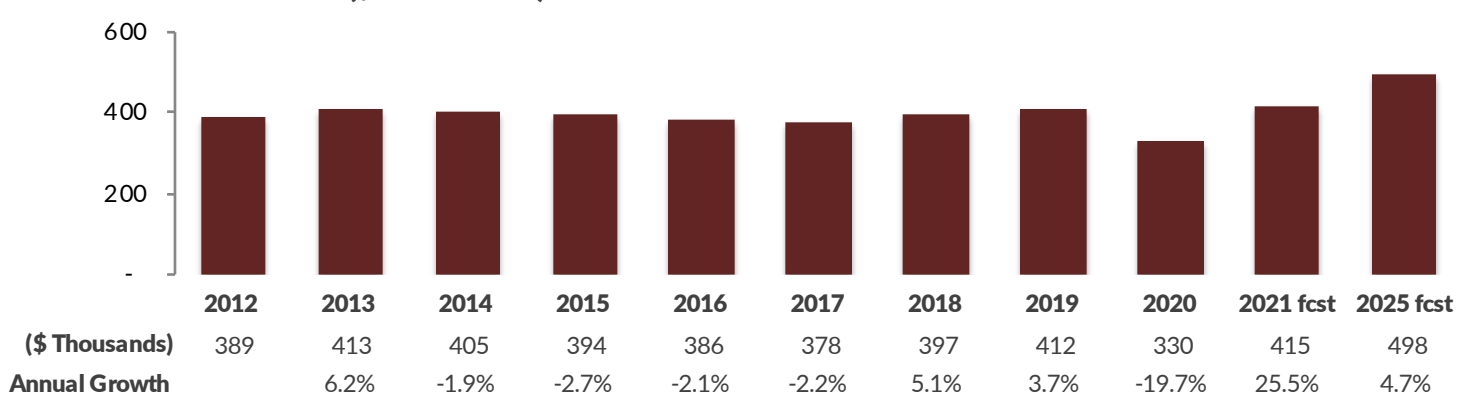
Below are the normalized growth benchmarks for the Florists industry, including revenue per company, revenue per location, and locations per company. These metrics are typically better to use to benchmark a company's performance, since they normalize for company and location growth.

Revenue per Retailer (\$ Thousands)



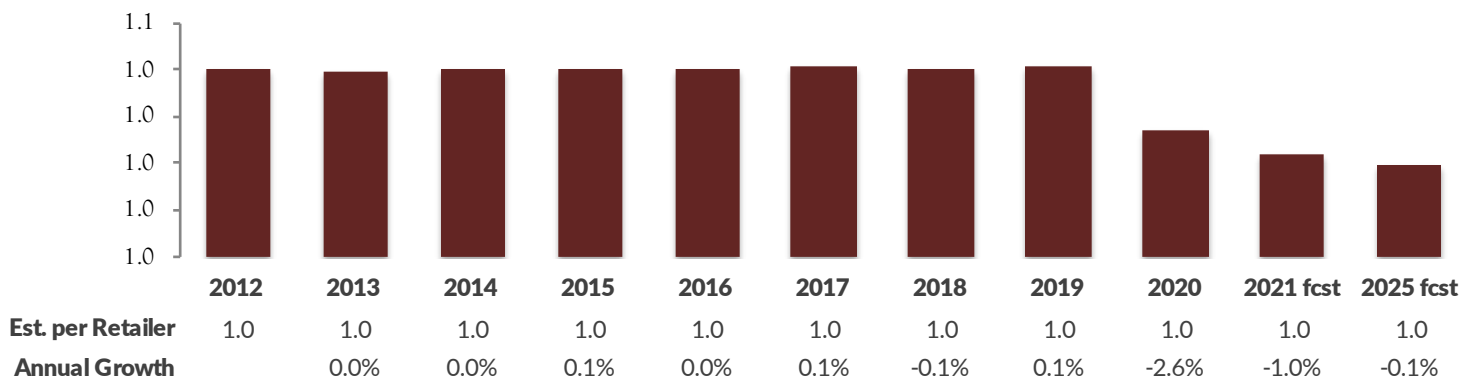
Compound Annual Growth Rate **-0.8%** 3-Year **-4.0%** 5-Year

Revenue Per Location (\$ Thousands)



Compound Annual Growth Rate **-0.8%** 3-Year **-3.5%** 5-Year

Locations per Retailer

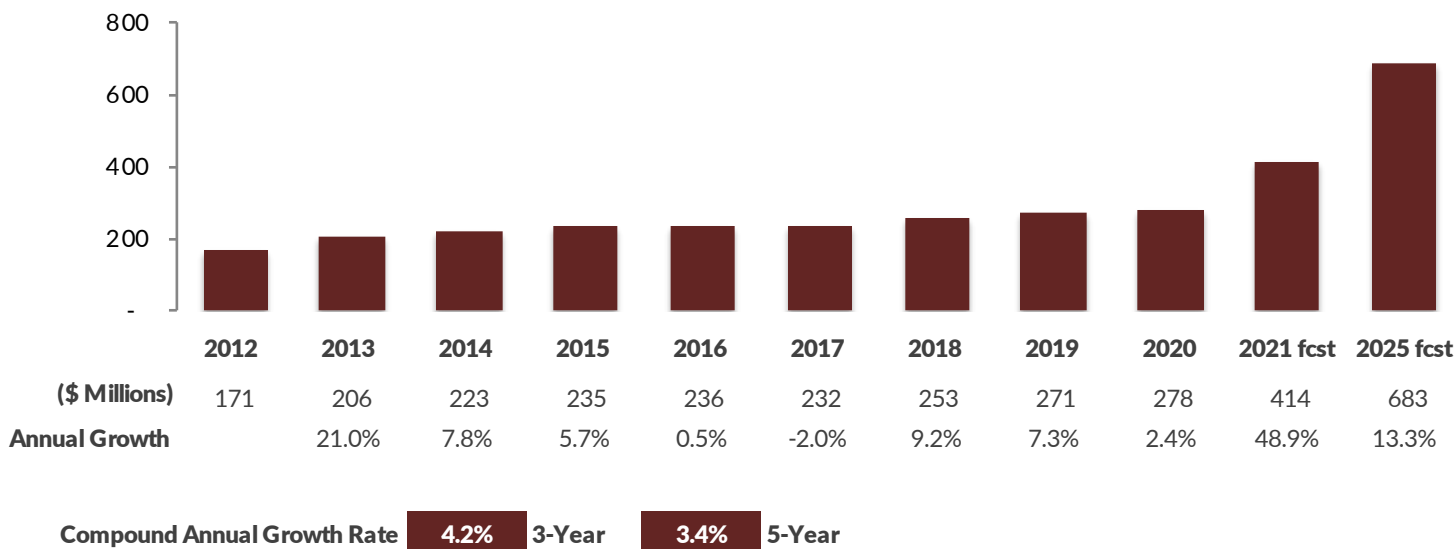


Compound Annual Growth Rate **0.0%** 3-Year **-0.5%** 5-Year

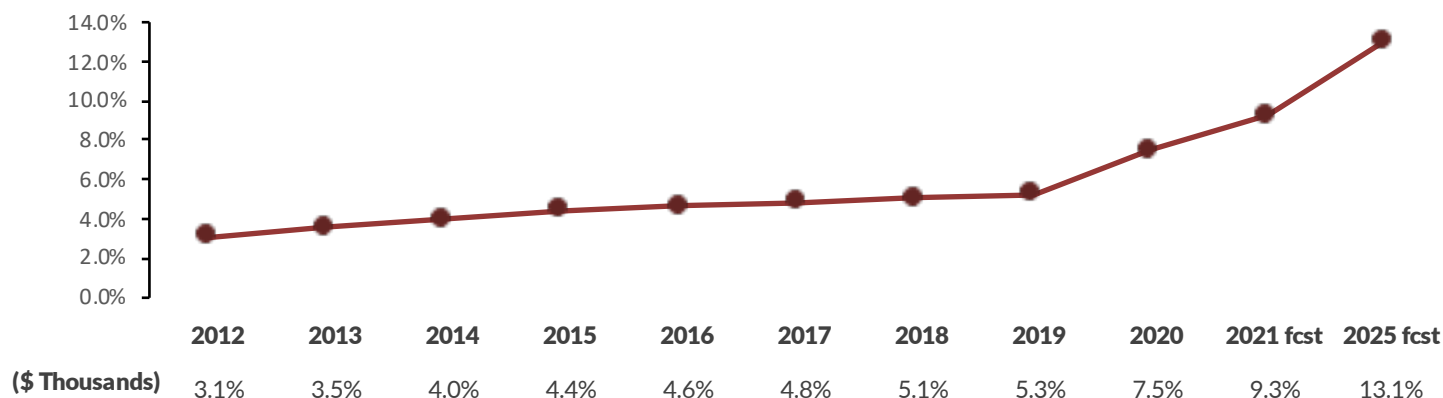
Ecommerce Sales

Below represents ecommerce sales for traditional Florists, along with ecommerce as a percentage of overall sales. The third graph is the total ecommerce sales as a percentage of the total U.S. retail sales, including all retail sectors.

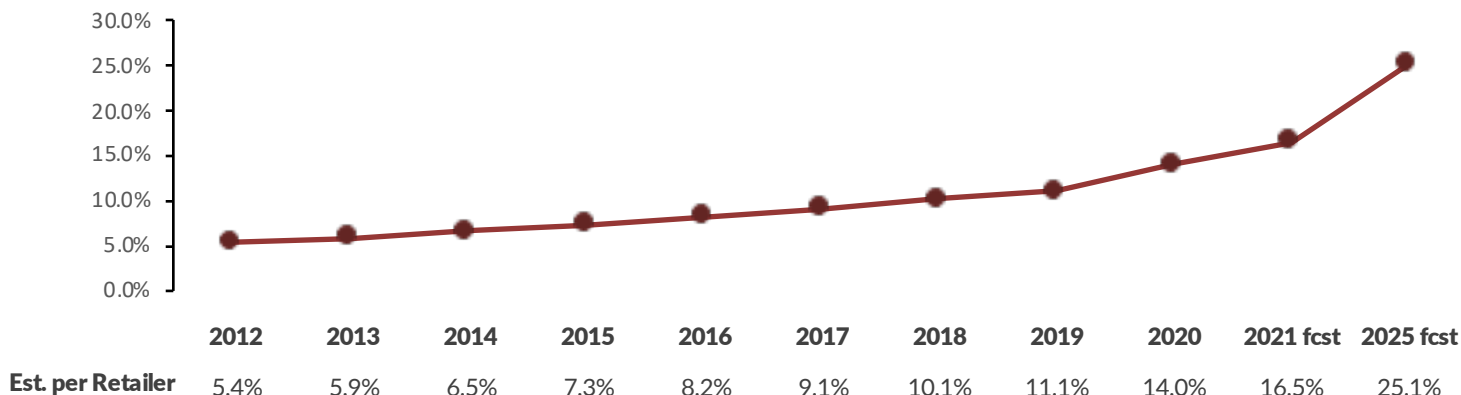
Ecommerce Sales of Traditional Florists



Ecommerce as a % of Traditional Florists Sales

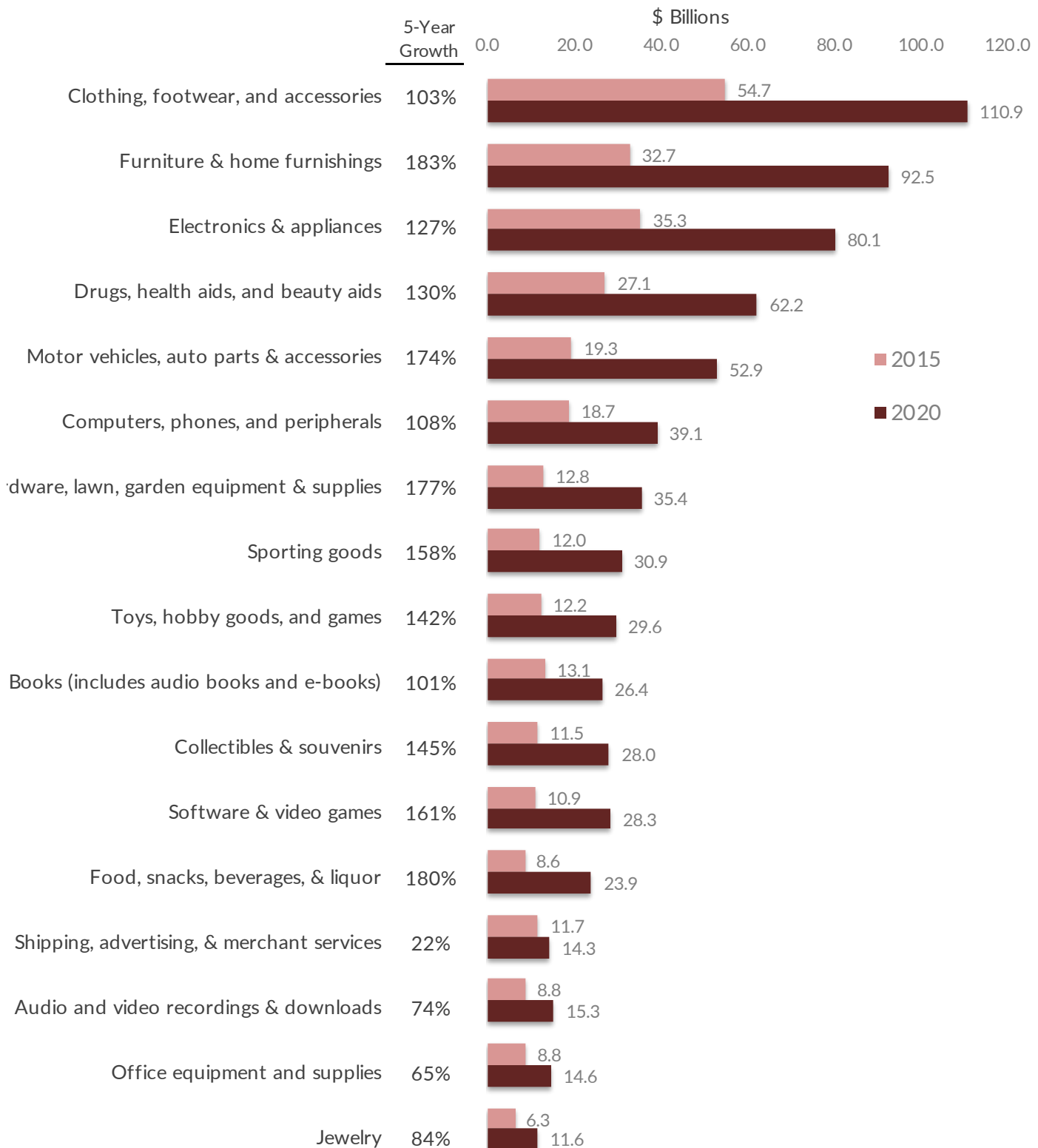


Total Ecommerce Sales as a % of Total Retail (Includes all Retail Sectors)



Ecommerce Category Sales of Retailers with No Physical Stores

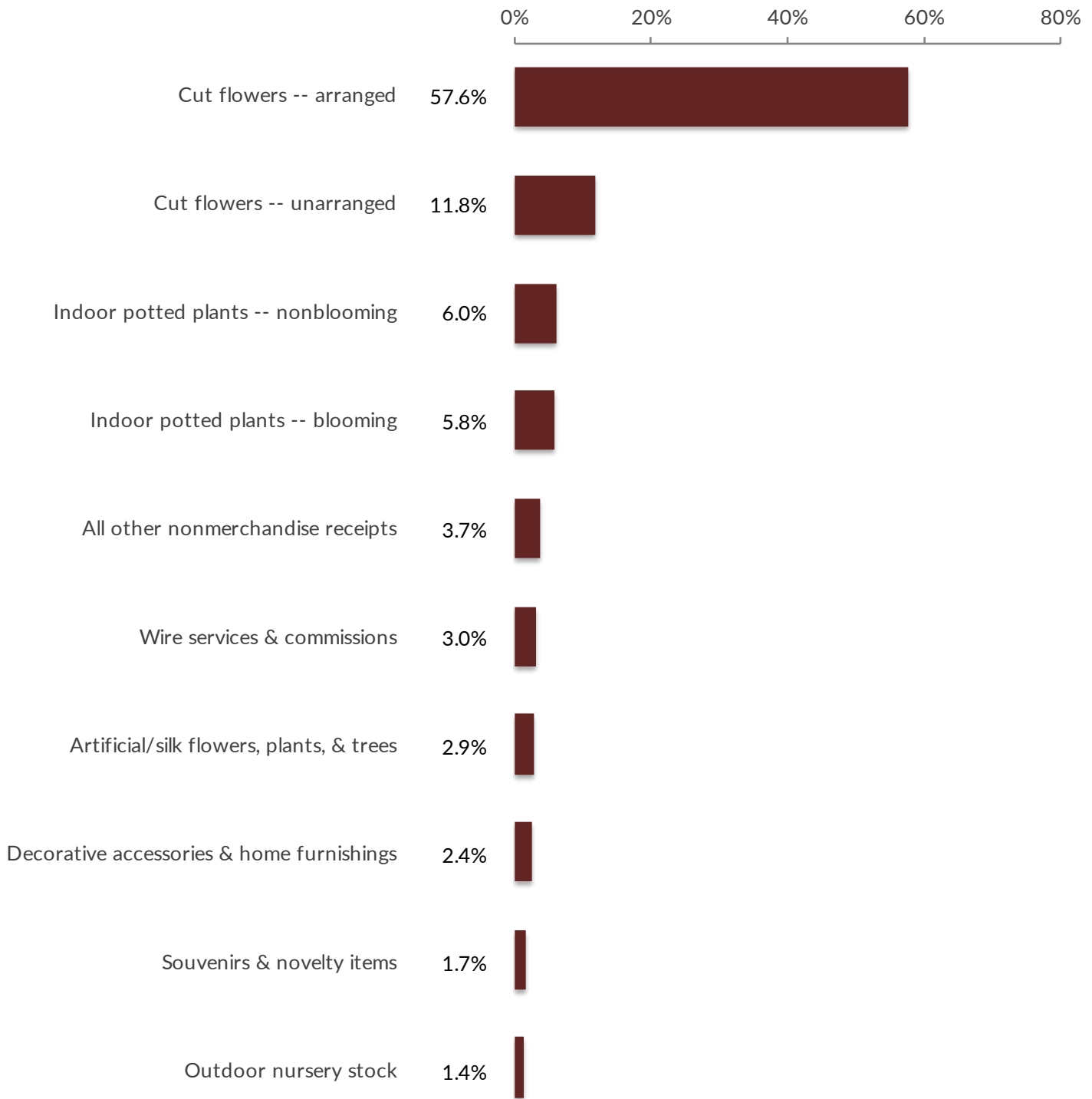
There are ~50,000 ecommerce retailers that do not have physical stores. These include ecommerce pure plays, such as Amazon, Ebay, and Blue Nile. Catalog and direct sales retailers that use a combination of catalogs, direct response, and online channels to sell merchandise. It also includes manufacturers that don't have physical retail, but do sell directly to consumers online. Below are the category sales for these retailers with no physical stores.



Breakdown of Top Product Lines

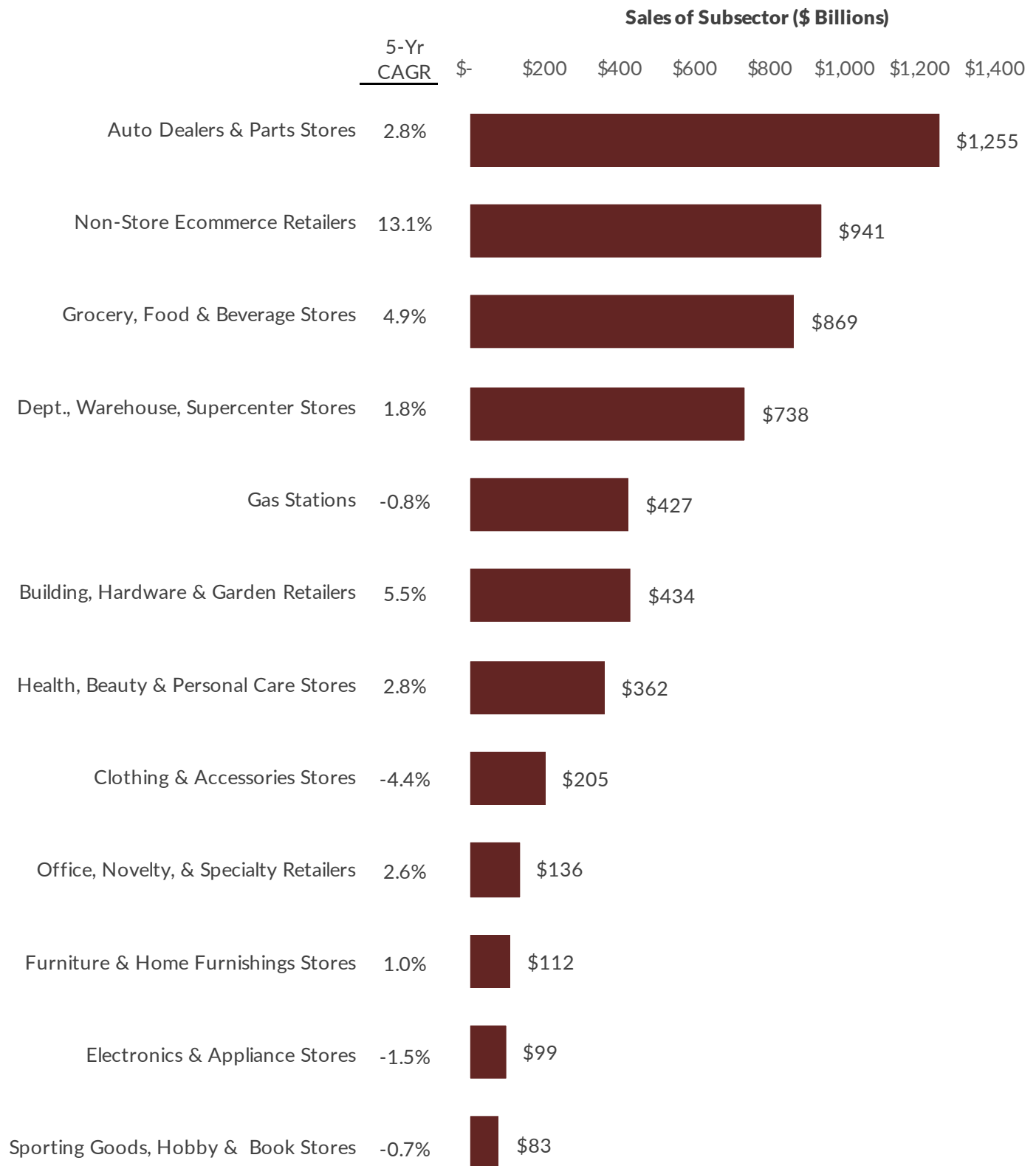
Below represents Florists industry sales as a percentage of the top product lines, which is used to highlight potential growth opportunities, strengths, and weaknesses.

Breakdown of Sales by Top Product Lines (%) Florists



Macro Retail Category Growth

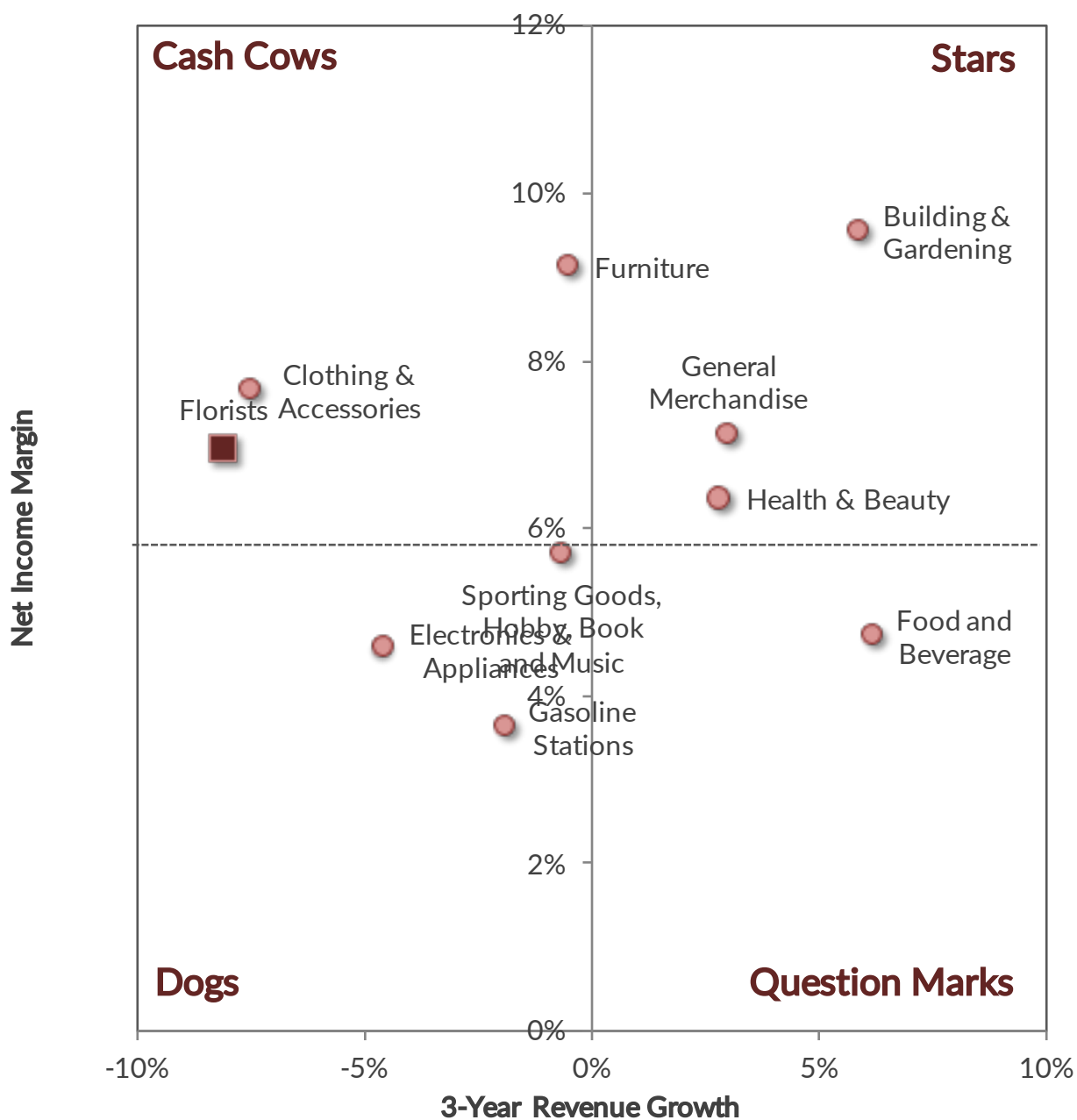
Understanding how your industry compares to the retail subsectors, can often put things into perspective or spur ideas and analogs. Below is the size and growth of all of the major retail subsectors.



Income vs. Revenue Growth Matrix

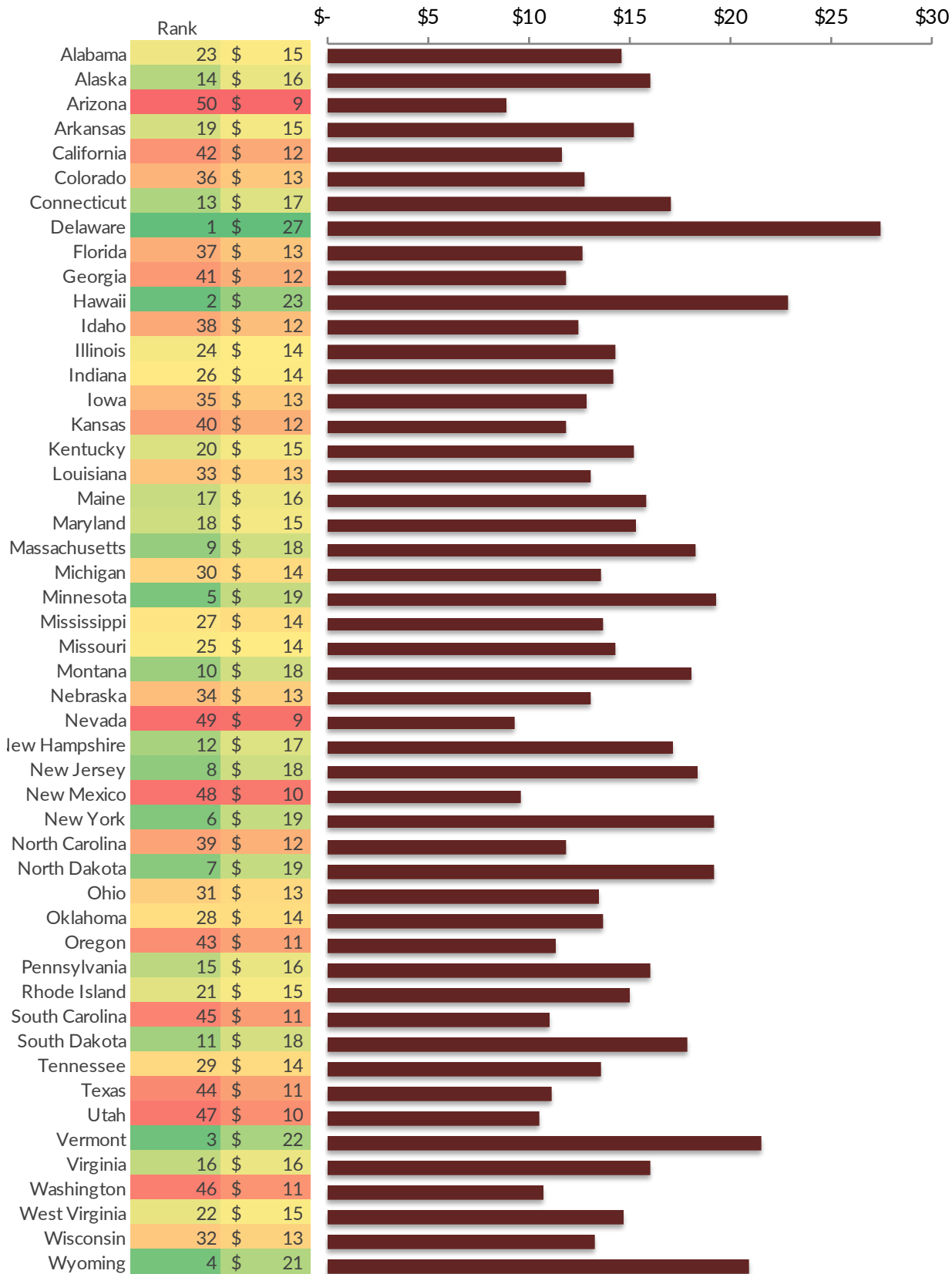
Similar to the famous BCG Matrix, though substituting net income margin for relative market share and taking it to the industry level, the Income vs. Revenue Growth Matrix is an insightful tool to create context for an industry and companies. Where is your industry on the matrix? And, more importantly, where does your company fall on the matrix?

Industries which can generate high net income margin and high revenue growth are known as the Star industries, which often attract higher levels of competition chasing the growth. While, those that generate low net income margin and low revenue growth are known as the Dogs. Often, Dog industries are very mature, and growth comes from consolidation and driving costs out of the business. Industries with high net income margin and low revenue growth are Cash Cows, which typically are more mature and have less overall investment, but have nice industry dynamics to protect the margins of the industry. While Question Mark industries are those that have high revenue growth, but low net income margin. Companies in Question Mark industries, which can drive competitive differentiation and a higher net income margin, can often realize significant profit growth.



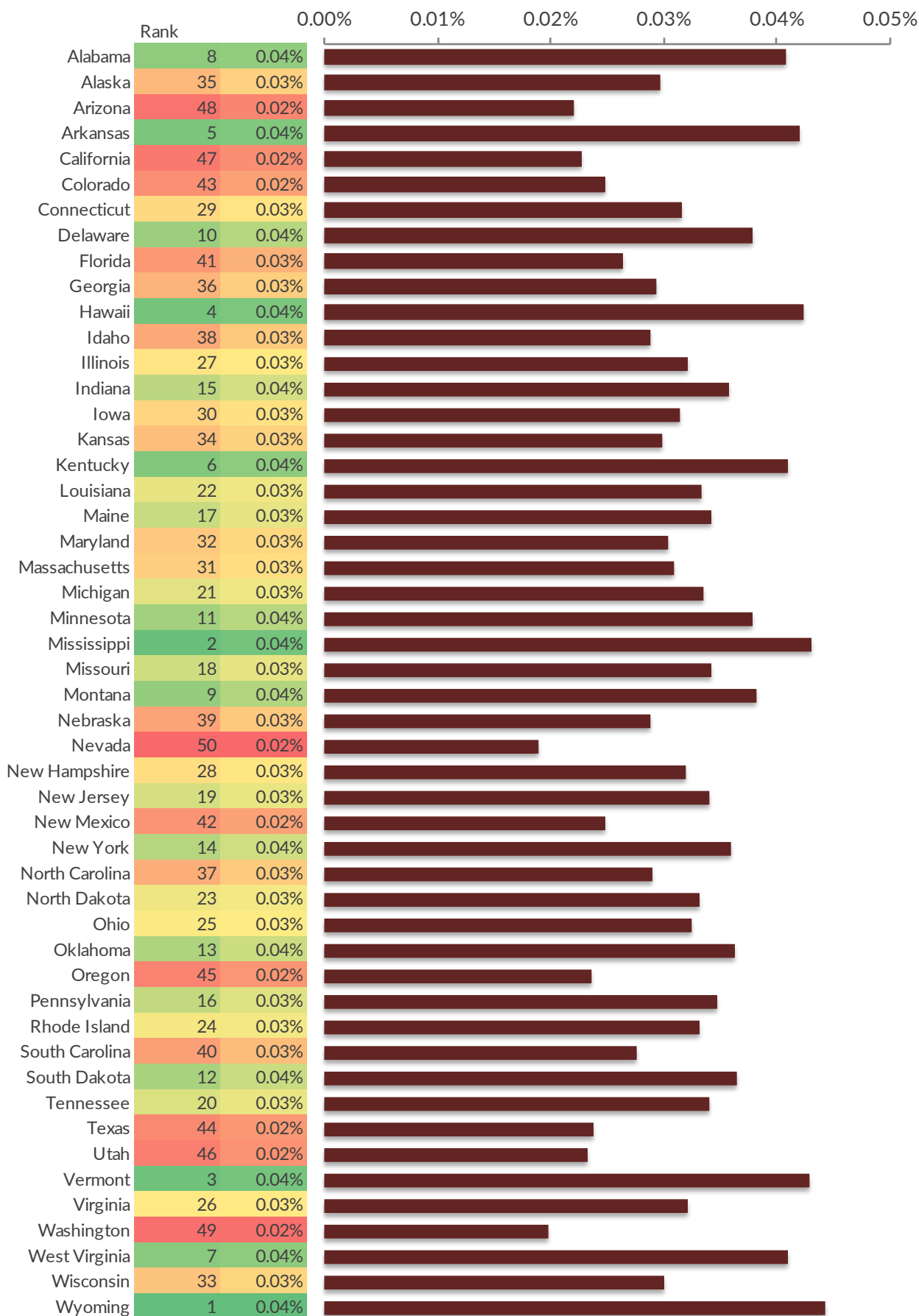
Sales per Capita by State

Below is industry sales per capita by state, which is useful to understand the total market potential by state. The metric is enhanced when compared to the sales per Location in each state. When it states "no data", there wasn't a sufficient sample size of data for the state.



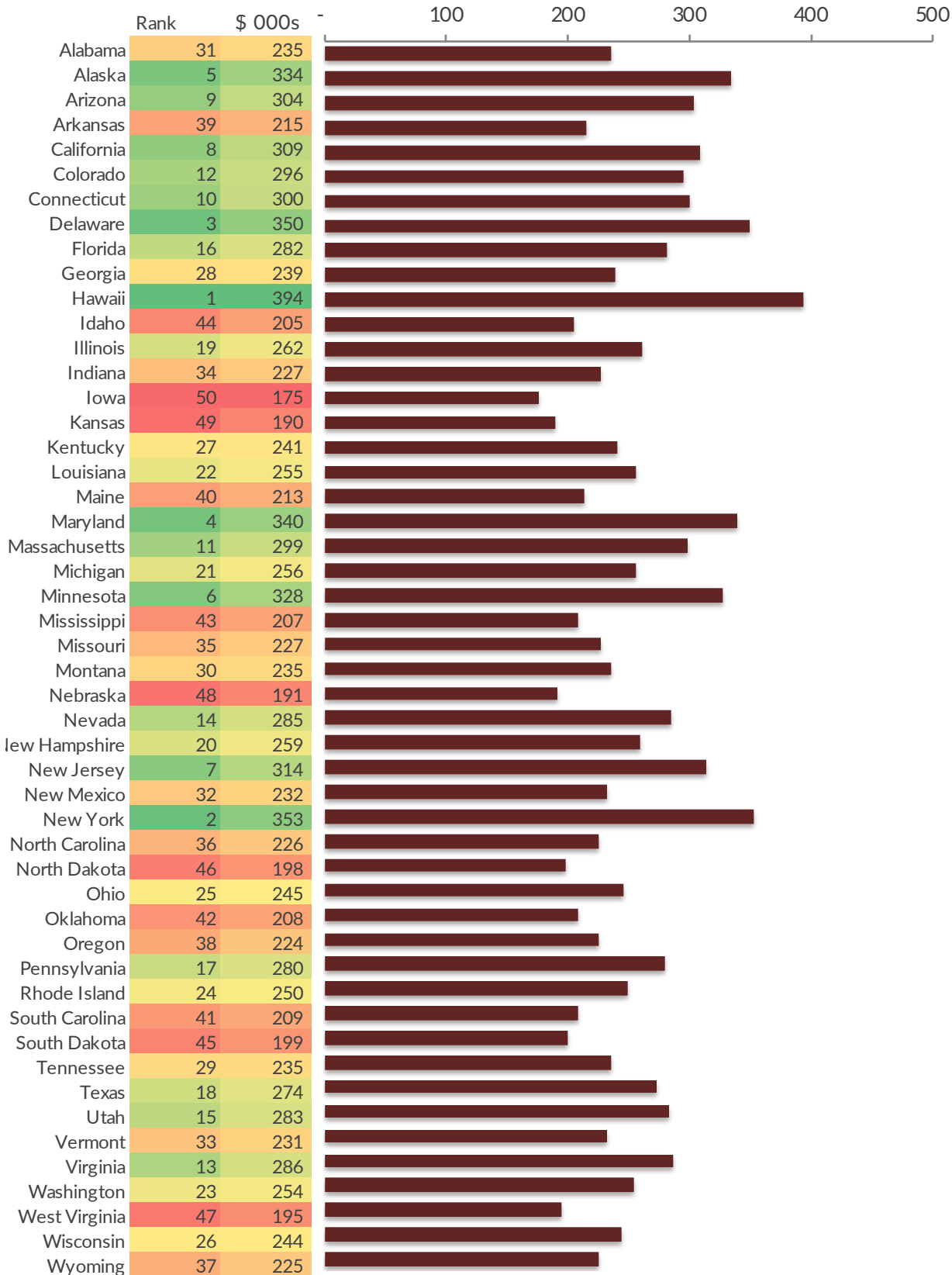
Sales as a Percent of Consumer Expenditures

Sales as a percent of consumer expenditures helps highlight the consumption differences by state. When it states "no data", there wasn't a sufficient sample size of data for the state.



Sales per Location by State

Sales per location highlights the competitive intensity of a state. Those states with really high sales per location, will most likely face increasing competition. While those with low sales per location will often be consolidated to drive cost and capital efficiencies. How does your company compare? When it states "no data", there wasn't a sufficient sample size of data for the state.

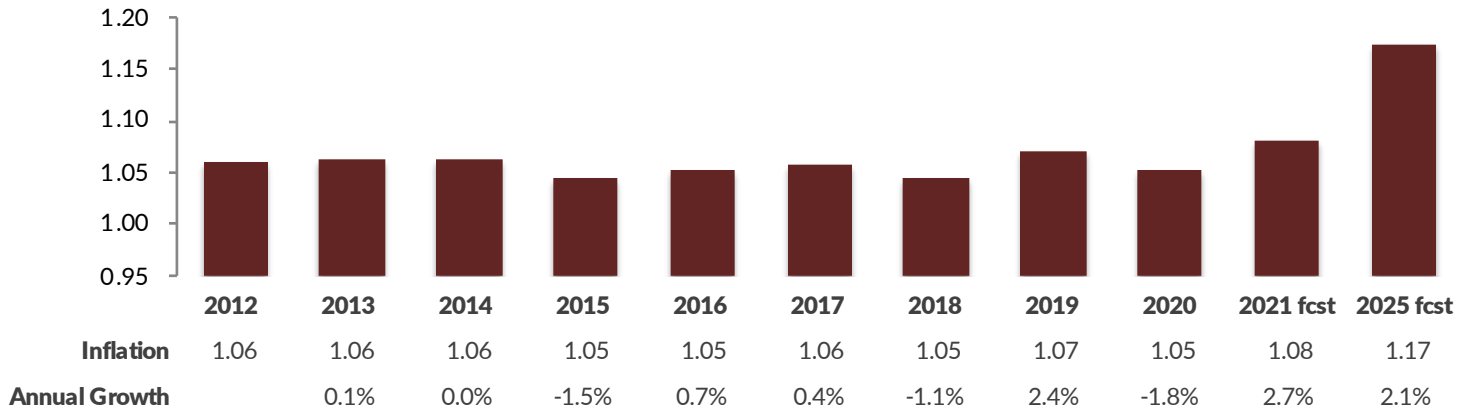


Pricing & Inflation

Understanding the pricing and inflation dynamics of an industry is critical to help inform the pricing decisions of a company. Below is the historical and forecasted inflation of the industry, and the seasonality of inflation over the past 4 years.

Florists Industry Inflation

(Indexed at 1 in 2010)



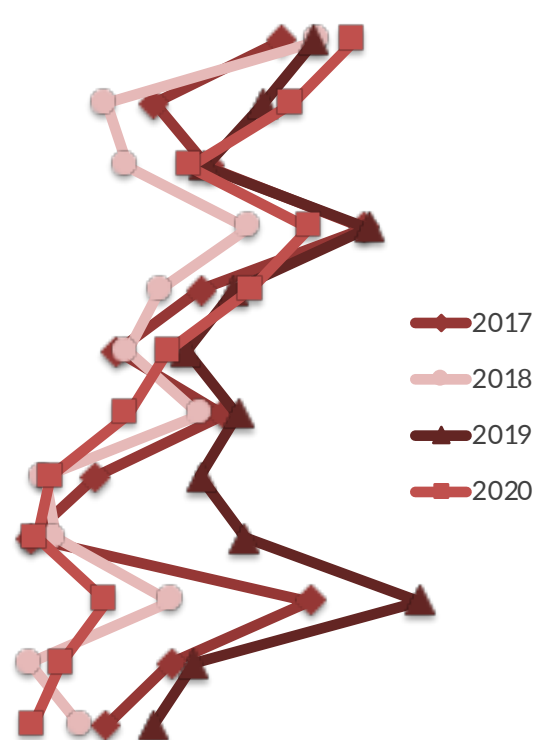
Compound Annual Growth Rate **0.6%** 3-Year **0.2%** 5-Year

Florists Industry Inflation

(Indexed at 1 in 2010)

	2017	2018	2019	2020
Jan.	1.078	1.087	1.086	1.095
Feb.	1.049	1.038	1.074	1.081
Mar.	1.062	1.043	1.061	1.057
Apr.	1.098	1.071	1.099	1.085
May	1.060	1.051	1.068	1.072
Jun.	1.041	1.043	1.057	1.052
Jul.	1.065	1.060	1.068	1.043
Aug.	1.035	1.024	1.060	1.025
Sep.	1.020	1.026	1.070	1.022
Oct.	1.085	1.053	1.111	1.038
Nov.	1.053	1.020	1.058	1.028
Dec.	1.038	1.032	1.049	1.021

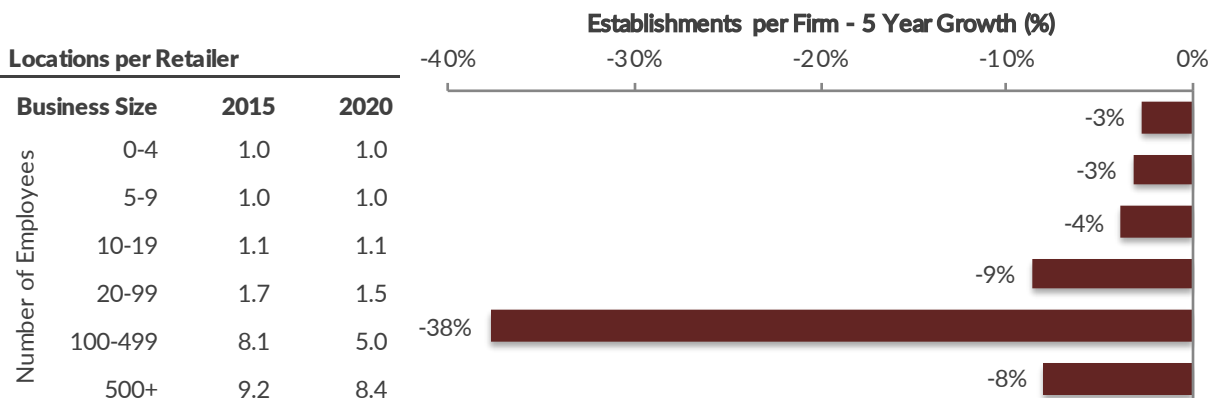
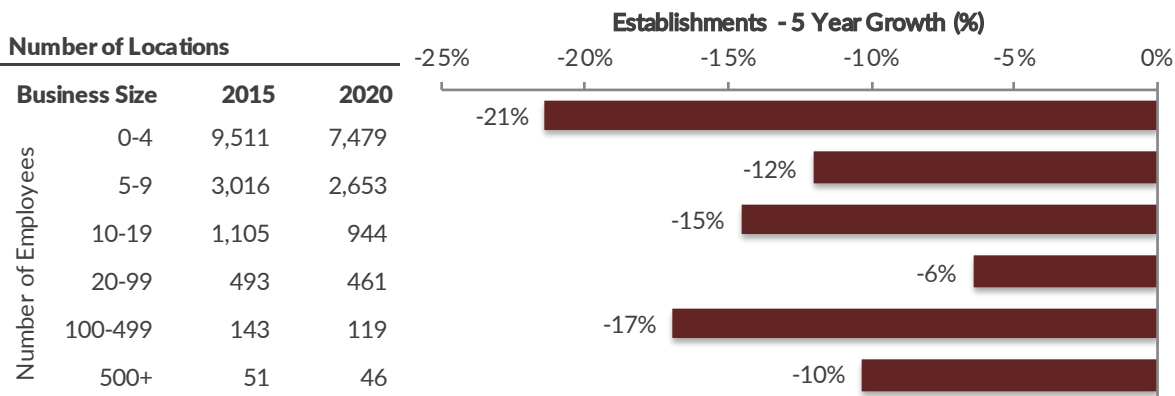
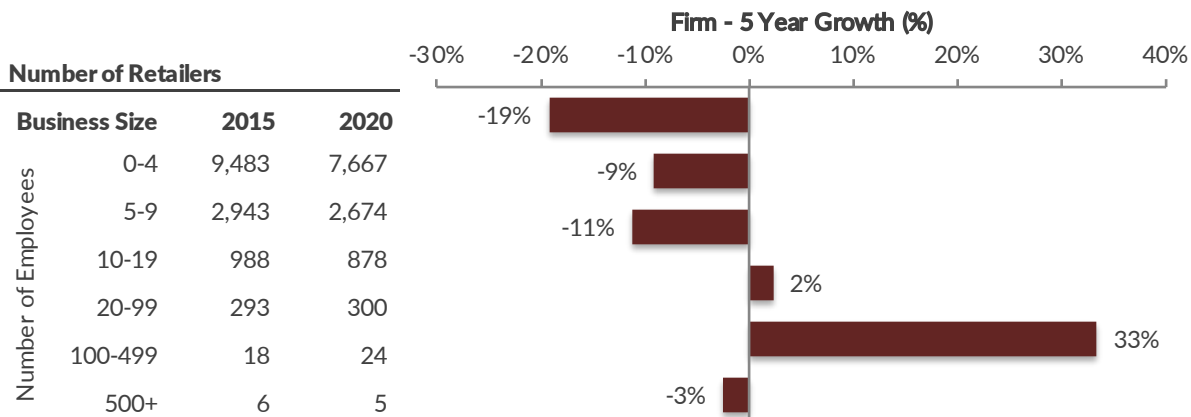
1.000 1.020 1.040 1.060 1.080 1.100 1.120



Consolidation Analysis

While industry level benchmarks are useful, digging into the growth and consolidation dynamics by the size of retailers (e.g., 0-4 employees = small retailer, 500+ employees = large retailer) can provide deep context and insight into the competitive dynamics. Below you have the number of retailers, locations and locations per retailer by size of retailer and growth over the past 5 years. How many employees does your company have? Is your size of retailer growing or shrinking?

Florists



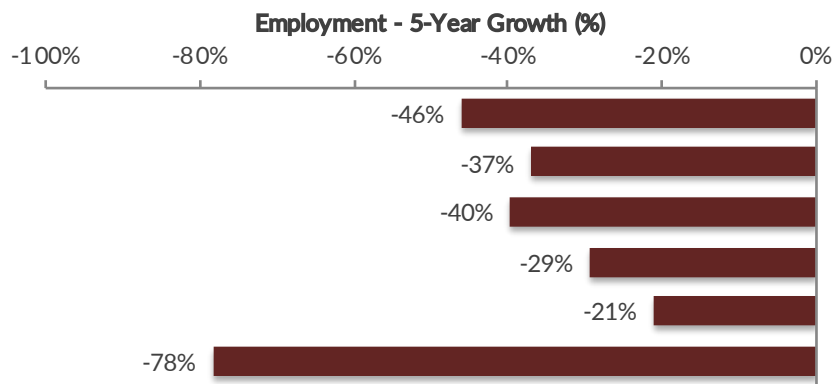
Employment by Business Size

Employment dynamics by size of Company highlights a deeper level of insight into what size companies are growing and shrinking. Below are metrics on employees , employees per company, and employees per Location segmented by business size with growth figures.

Florists

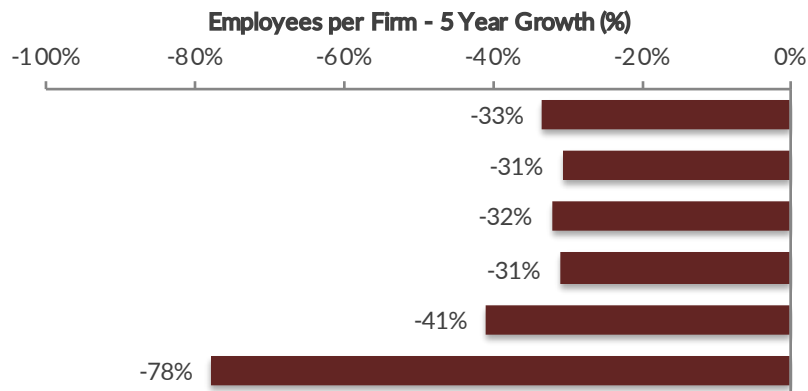
Number of Employees

Business Size	2015	2020
0-4	19,308	10,410
5-9	19,416	12,226
10-19	13,044	7,864
20-99	8,826	6,234
100-499	1,773	1,399
500+	1,336	290



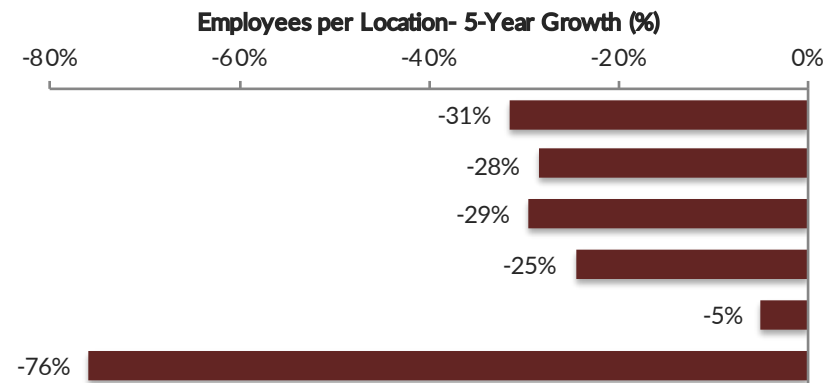
Employees per Retailer

Business Size	2015	2020
0-4	2.0	1.4
5-9	6.6	4.6
10-19	13.2	9.0
20-99	30.2	20.8
100-499	99.8	59.1
500+	238.3	53.1



Employees per Location

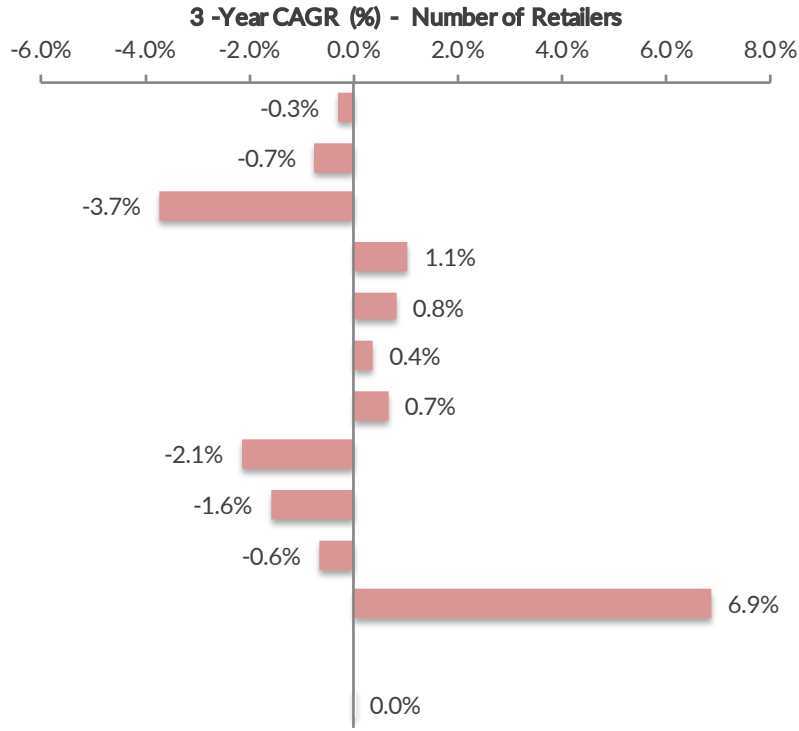
Business Size	2015	2020
0-4	2.0	1.4
5-9	6.4	4.6
10-19	11.8	8.3
20-99	17.9	13.5
100-499	12.4	11.8
500+	26.0	6.3



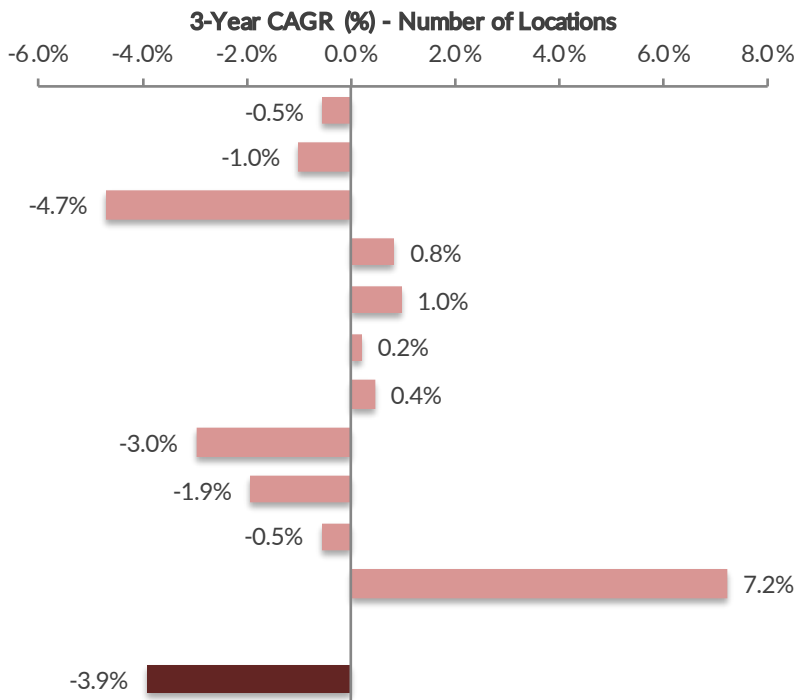
Subsector Consolidation Analysis (1/2)

Below are growth figures for number of companies and locations for all of the major services subsectors with the Homeowners Associations industry metric at the bottom of the chart.

3 Yr. Growth in the # of Retailers



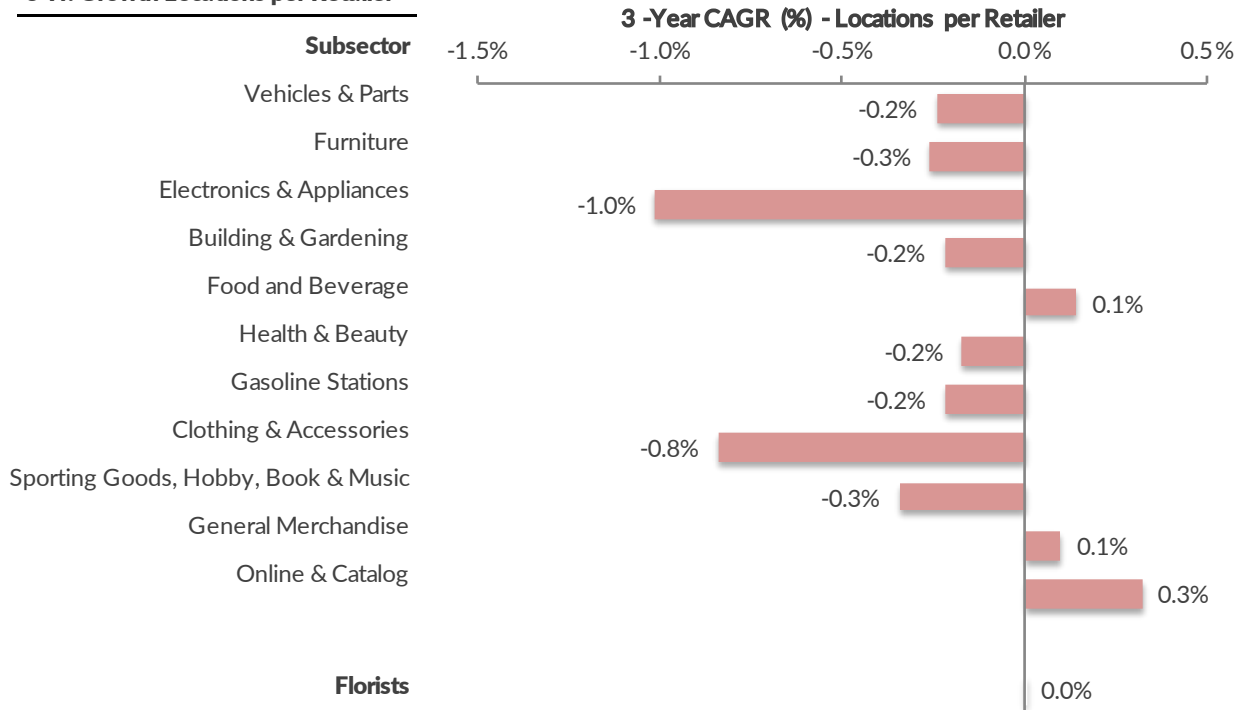
3 Yr. Growth in # of Locations



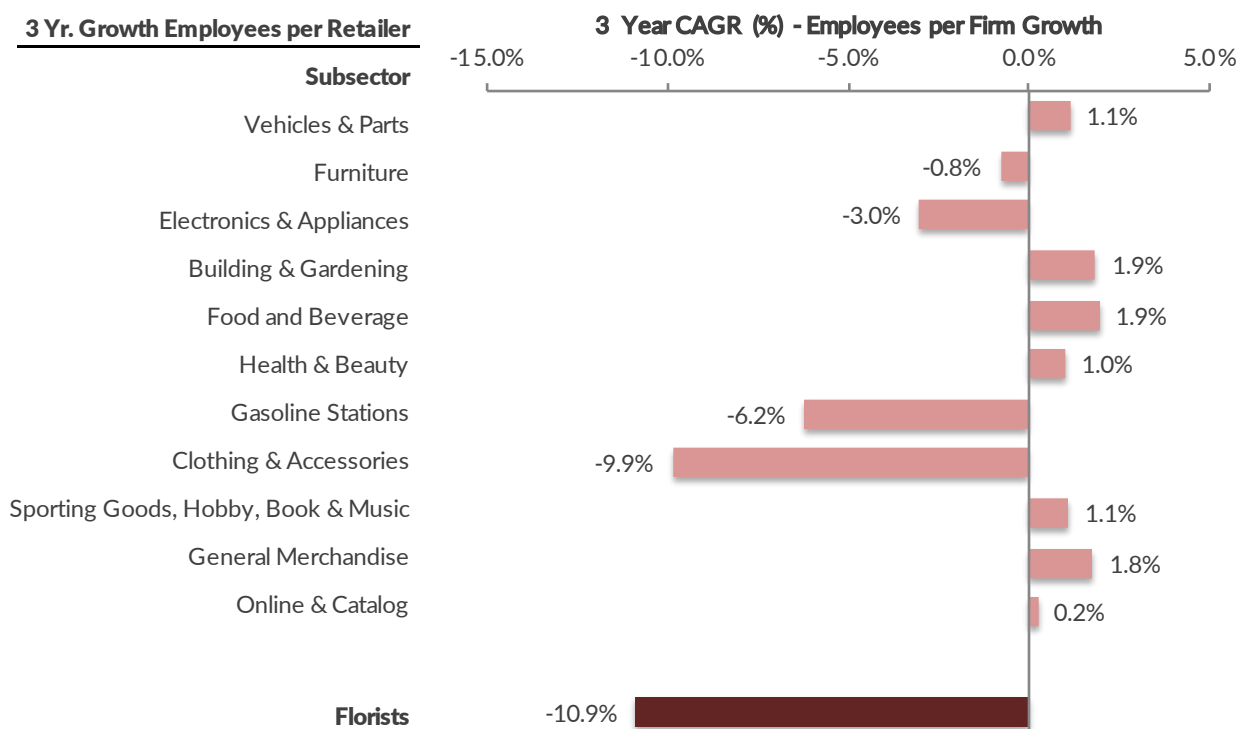
Subsector Consolidation Analysis (2/2)

Comparing your industry's retailer and employees per retailer growth versus the other retail subsectors can provide broader strategic context.

3 Yr. Growth Locations per Retailer



3 Yr. Growth Employees per Retailer



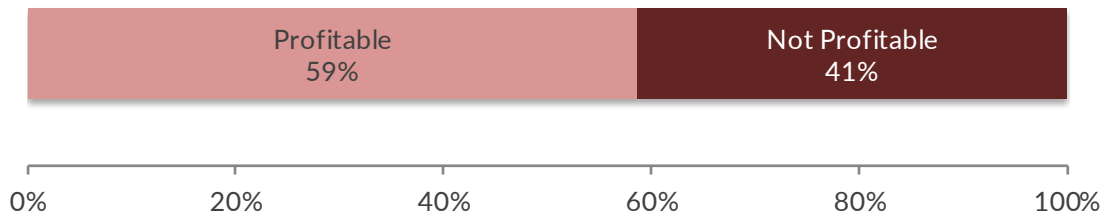
Section Two

Costs, Financials, and Workforce Benchmarks

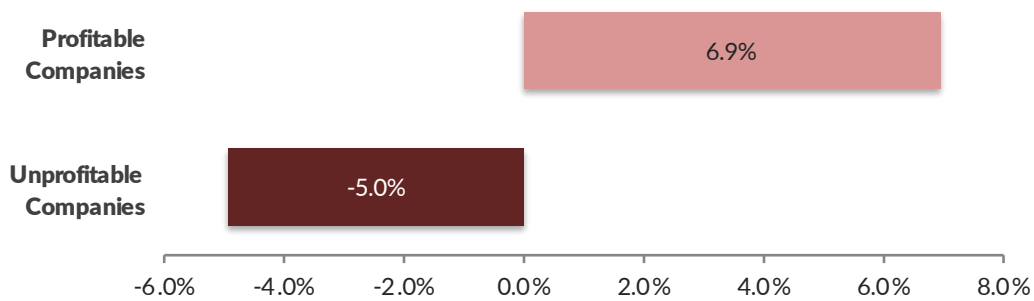
Profitability & Financial Ratio Analysis

Below are benchmarks for the percent of companies that are profitable, average net income as a percent of revenues, and financial ratios including total asset turnover, fixed asset turnover, fixed assets to total assets ratio, total assets to total liabilities ratio, return on sales, return on total assets, return on net worth, total liabilities to net worth ratio, fixed assets to net worth ratio, and solvency ratio.

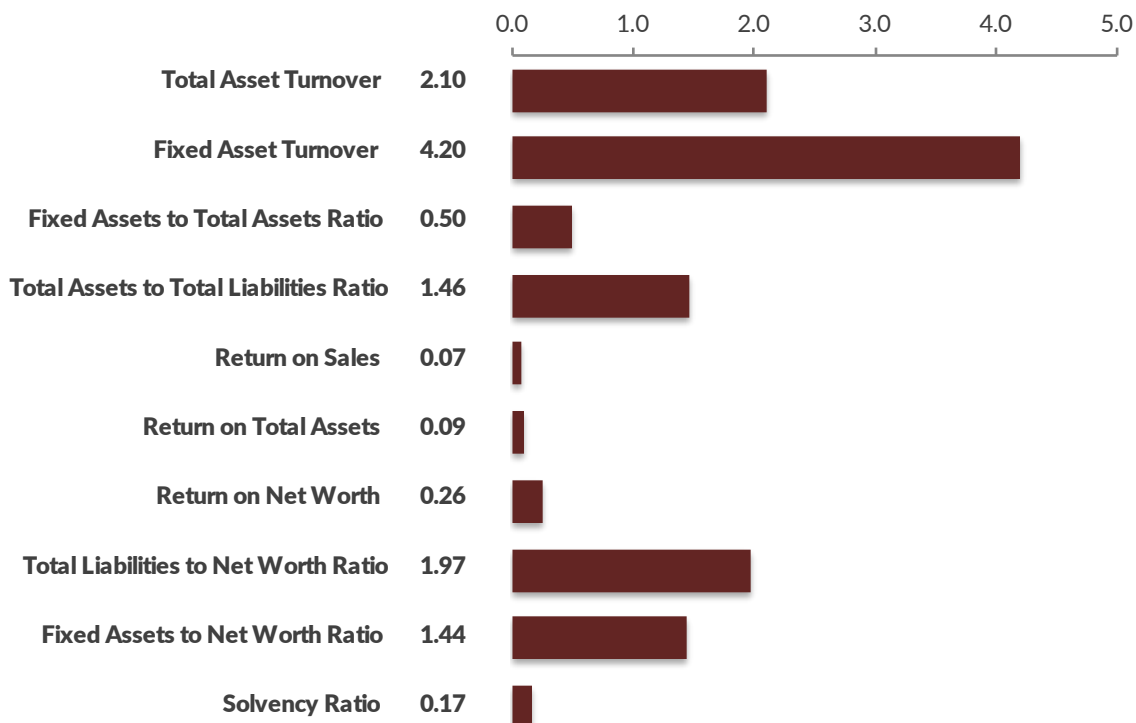
Percent of Companies that are Profitable



Average Net Income as a Percent of Revenues



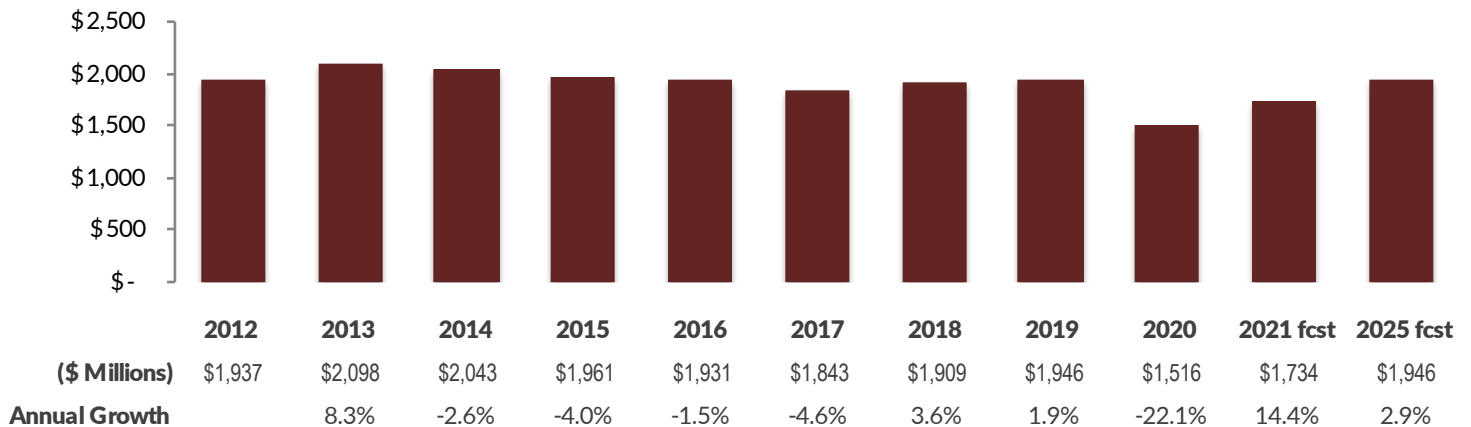
Financial Ratios



Operating Expenses

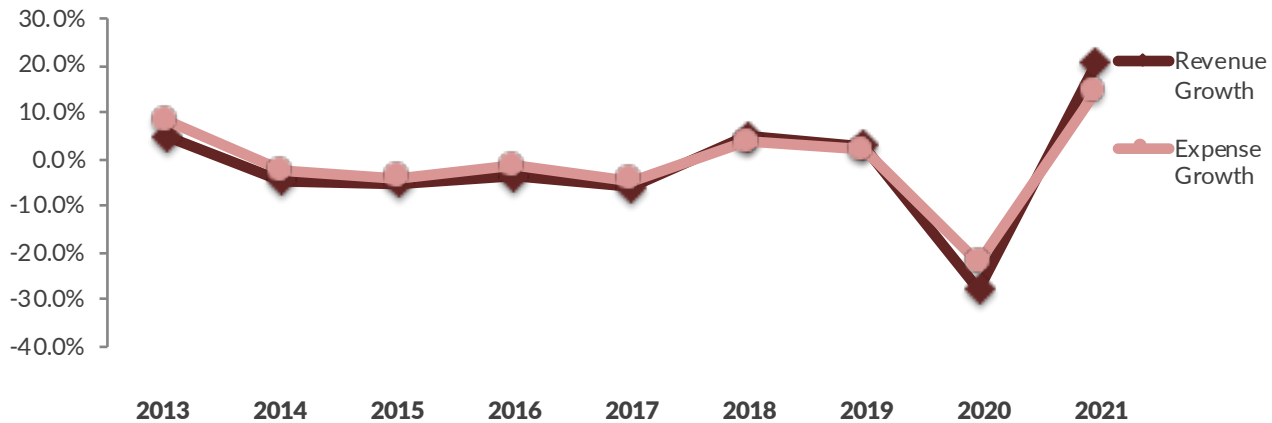
Below is total industry operating expense, industry revenue vs. industry opex growth, and opex as a percentage of revenue for the Florists industry. The data sets include historical and forecasts.

Industry Operating Expenses

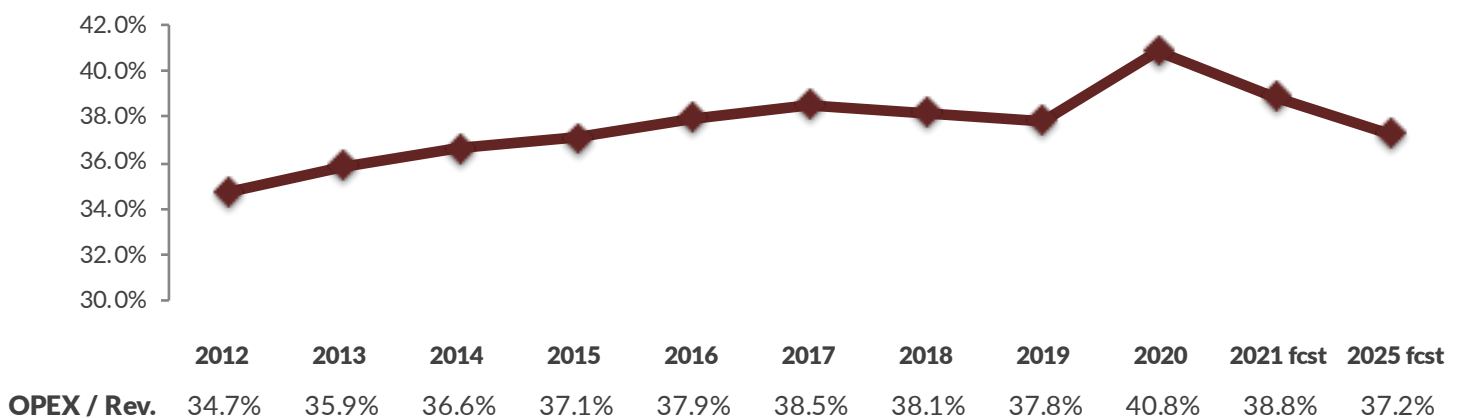


Compound Annual Growth Rate **-6.3%** 3-Year **-5.0%** 5-Year

Industry Revenue vs. Operating Expense Growth



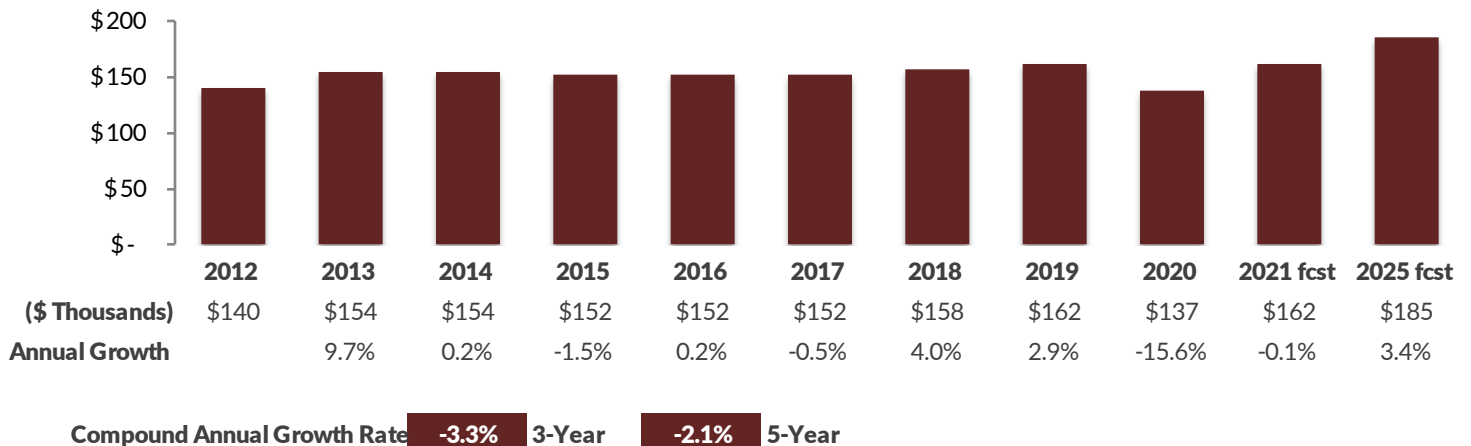
Operating Expense as a Percent of Revenues



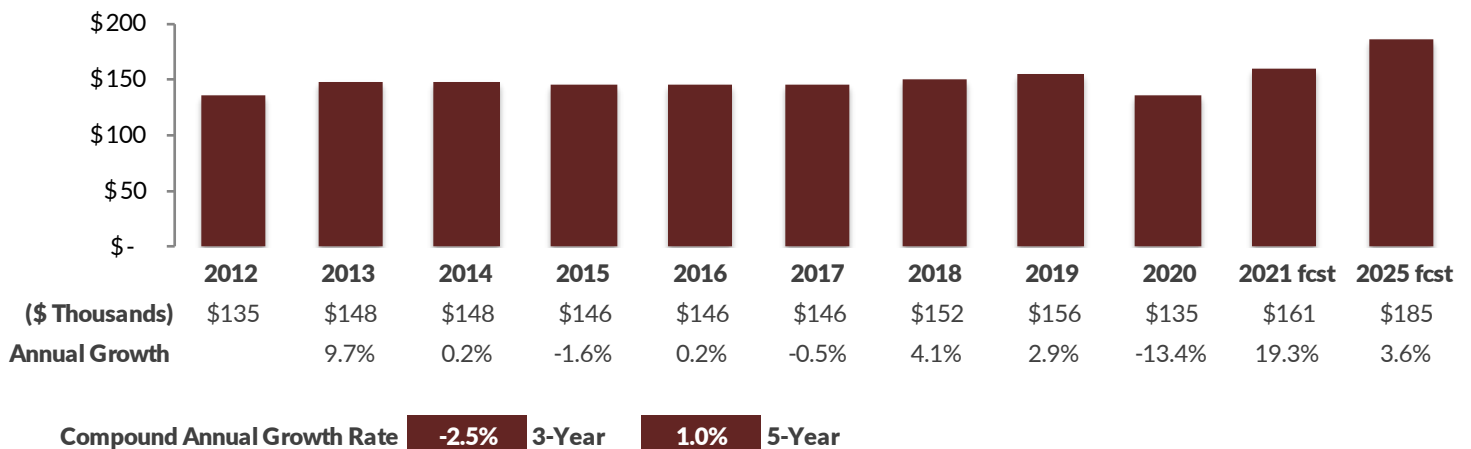
Operating Expenses per Retailer & Location

Given the dynamics of company and location growth and consolidation in the industry, it is important to normalize operating expense growth by company and location, which are below. This serves as a better benchmark for operating expense comparisons.

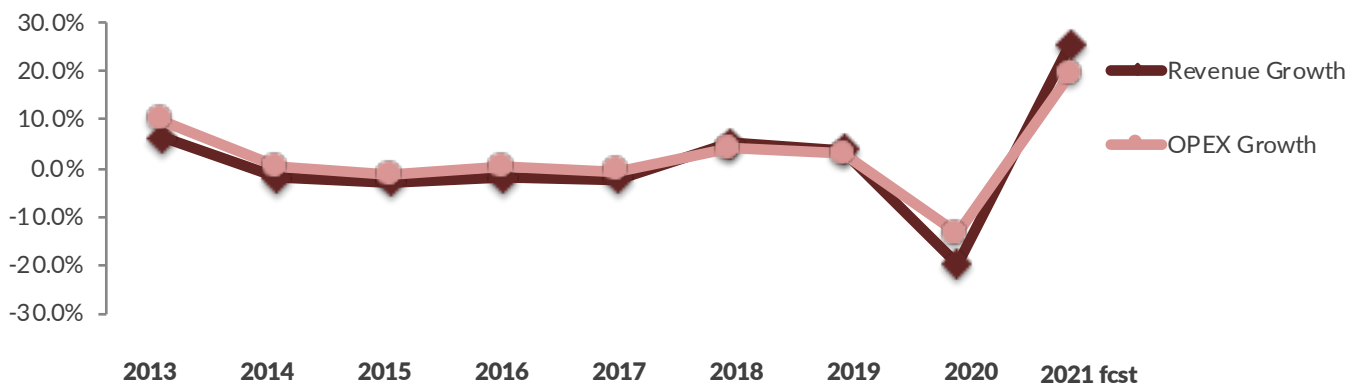
Industry Operating Expenses per Retailer



Industry Operating Expenses per Location



Revenue Growth per Location vs. Operating Expense Growth per Location

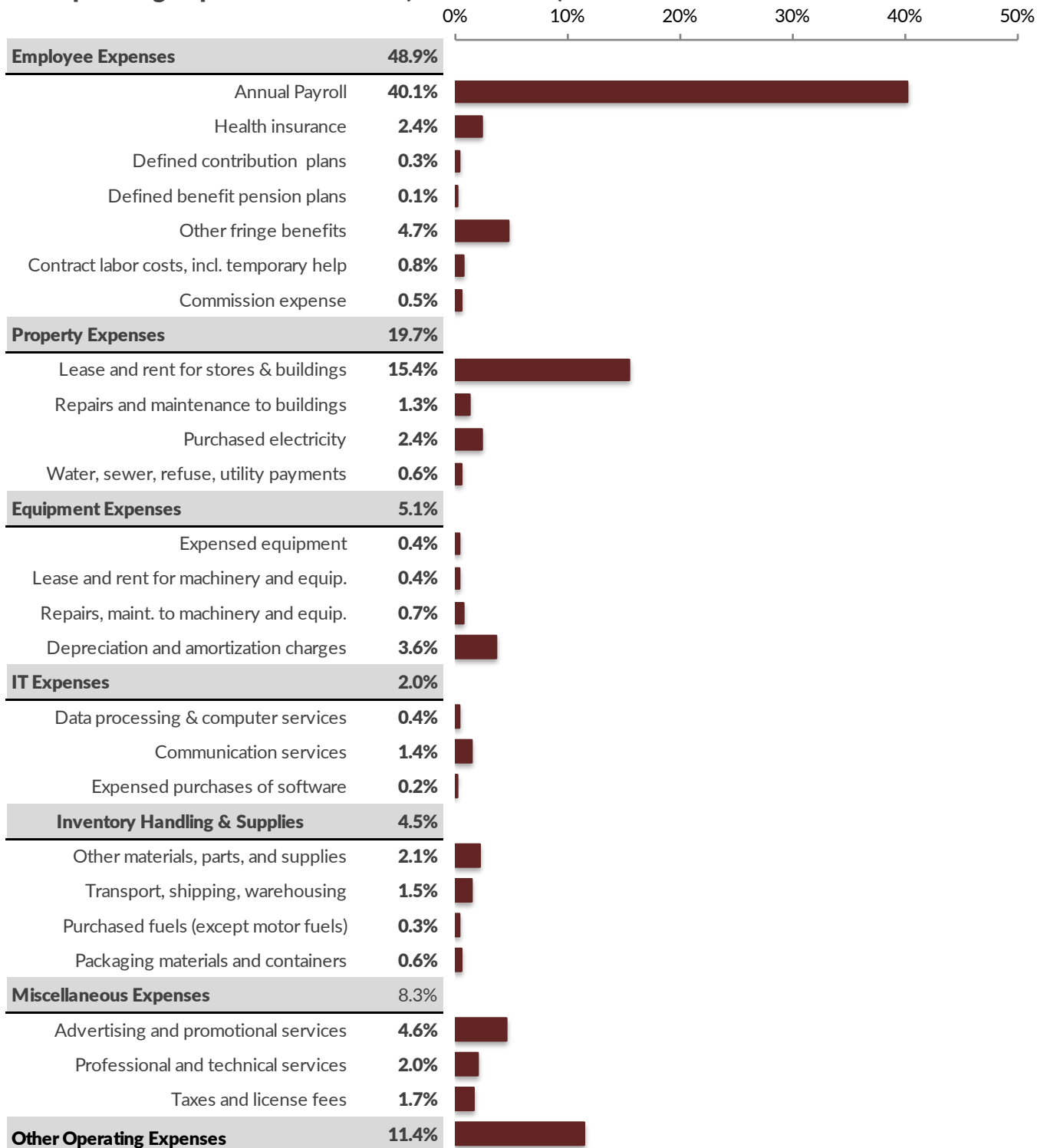


Operating Expense Detail

The detail below of the components that make up the industry's operating expense is really useful to benchmark your company's expenses against. Doing a simple gap analysis may show you where your company has opportunity to cut costs and strategically spend some more money to optimize its cost structure.

Florists

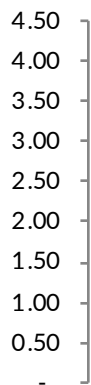
Operating Expense Breakdown (Total = 100%)



Inventory Turns & Gross Margin

Retailers tie up a significant amount of capital in inventory, and the ability to successfully manage this inventory is one of the major drivers of value growth. And, the ability to manage the costs of this inventory, while properly pricing the inventory drives the gross margin of a retailer.

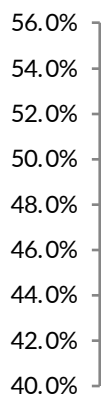
Inventory Turns



	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021 fcst	2025 fcst
Inventory Turns	3.76	3.66	3.61	3.52	3.55	3.47	3.51	3.52	3.10	3.87	3.78
Annual Growth		-2.7%	-1.4%	-2.5%	1.1%	-2.3%	0.9%	0.4%	-12.0%	25.0%	4.1%

Compound Annual Growth Rate **-3.8%** 3-Year **-2.5%** 5-Year

Gross Margin



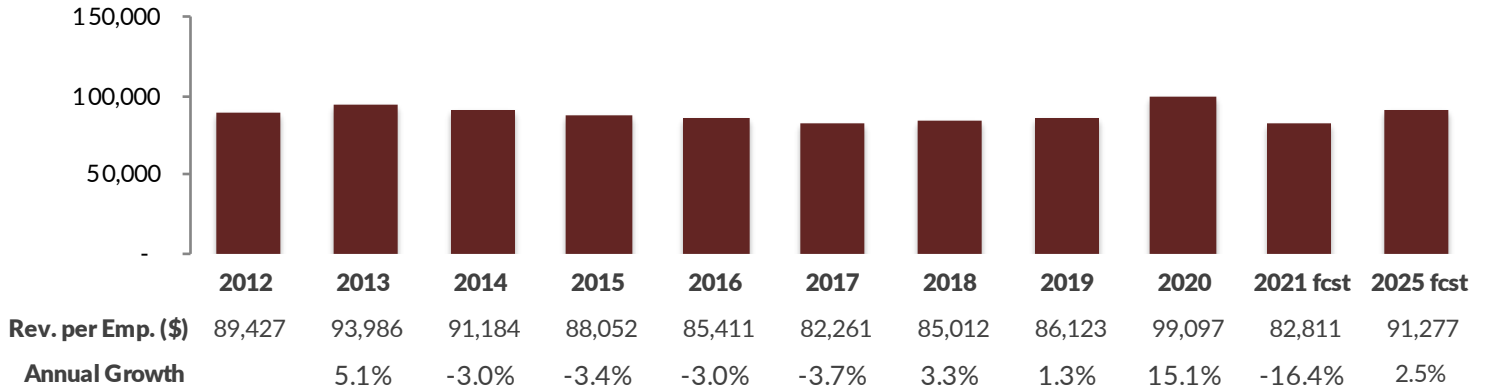
	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021 fcst	2025 fcst
Gross Margin (%)	47.1%	48.2%	49.1%	50.6%	50.6%	51.6%	51.3%	50.8%	45.7%	54.4%	52.3%
Annual Growth		2.3%	1.9%	3.1%	0.0%	2.0%	-0.6%	-1.0%	-10.0%	19.1%	2.7%

Compound Annual Growth Rate **-4.0%** 3-Year **-2.0%** 5-Year

Employee Productivity & Industry Employment

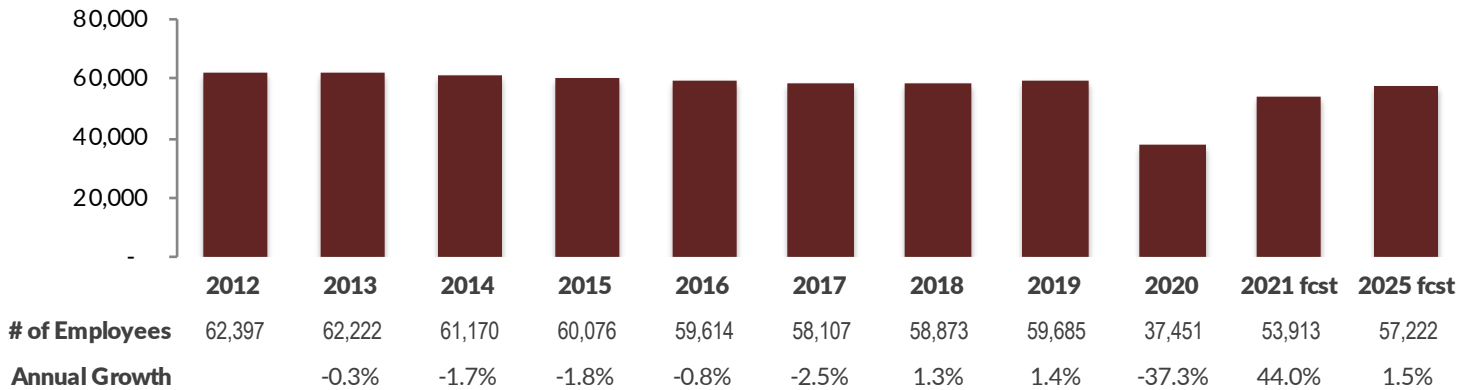
One of the simplest yet most powerful benchmarks is productivity or revenue per employee, which is a nice input to helping you figure out if your company may have too many people or too few for its size. While employment growth of the industry can often highlight interesting supply and demand dynamics for talent.

Productivity - Revenue (output) per Employee



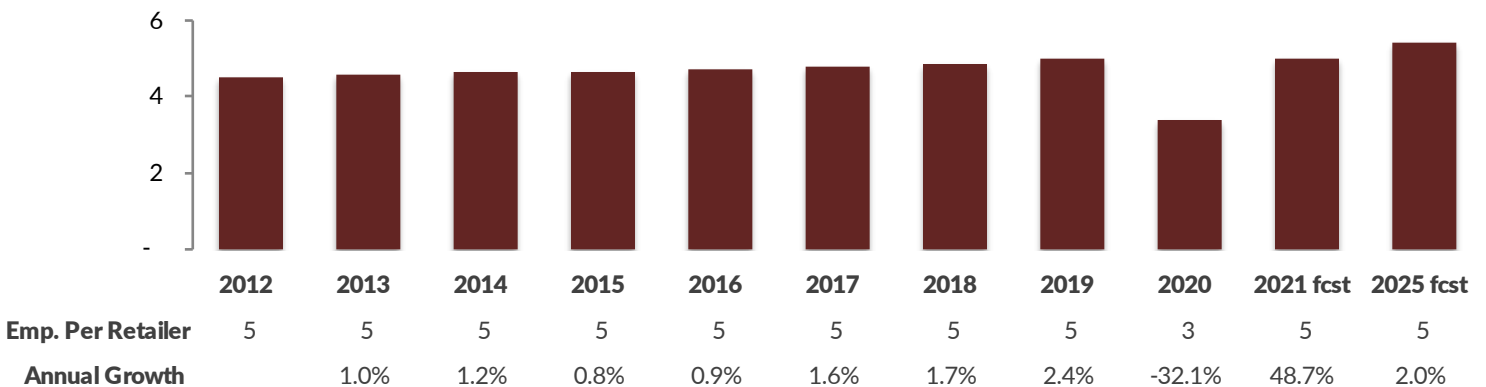
Compound Annual Growth Rate **6.4%** 3-Year **2.4%** 5-Year

Total Industry Employees



Compound Annual Growth Rate **-13.6%** 3-Year **-9.0%** 5-Year

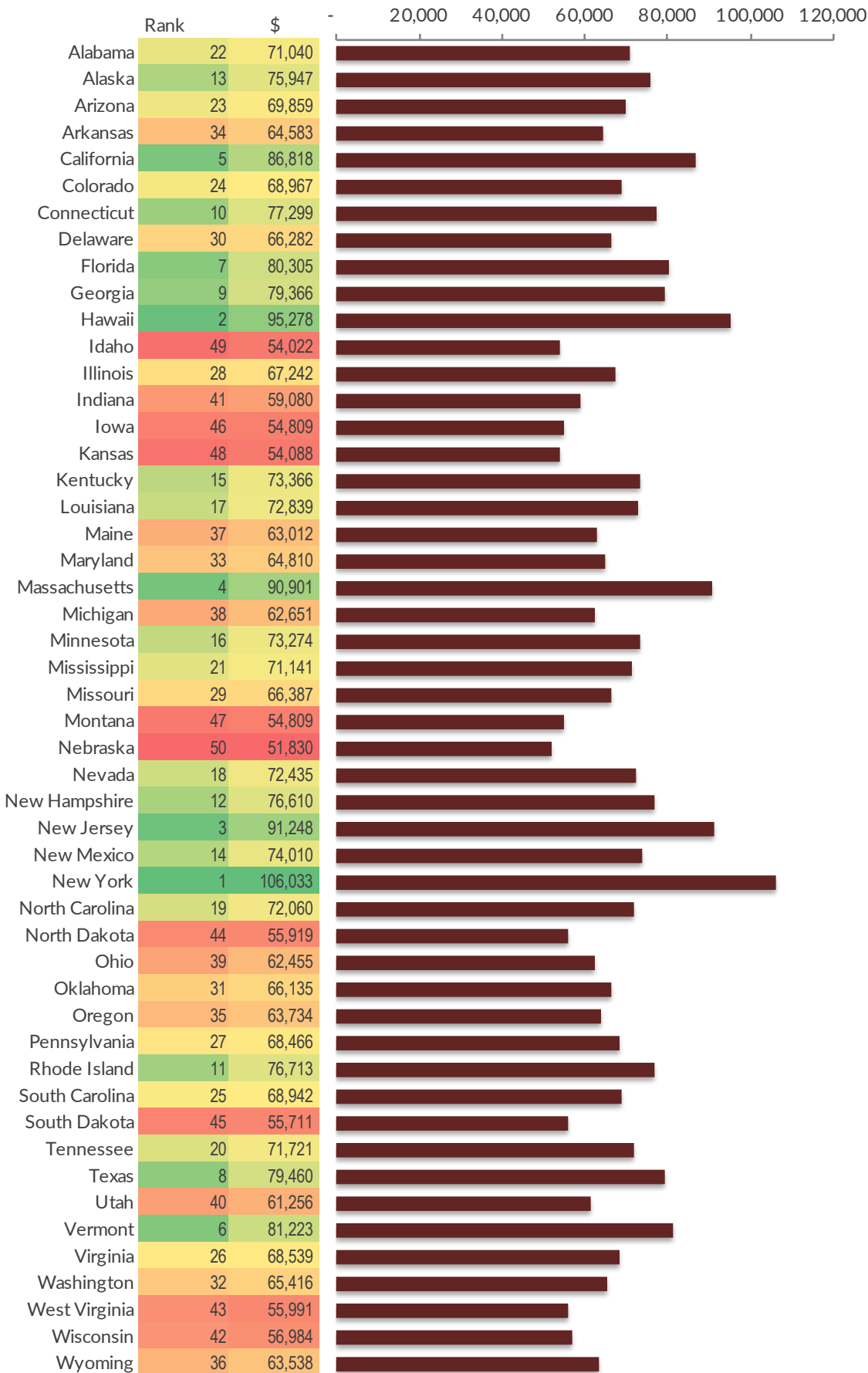
Employees per Retailer



Compound Annual Growth Rate **-10.9%** 3-Year **-6.2%** 5-Year

Productivity by State - Revenue (output) per Employee

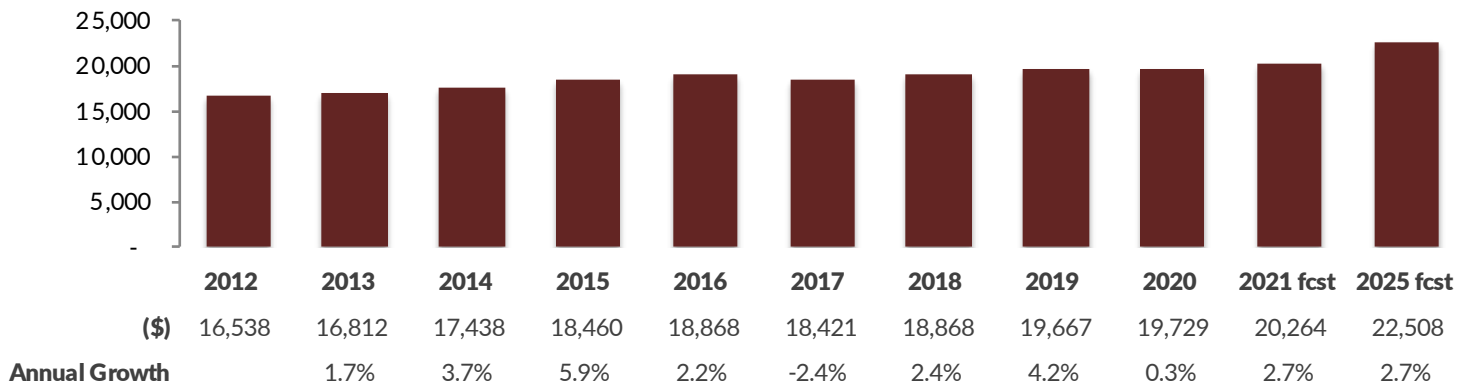
Below is productivity (total revenue divided by total number of employees) by state. When it states "no data", there wasn't a sufficient sample size of data for the state.



Industry Payroll

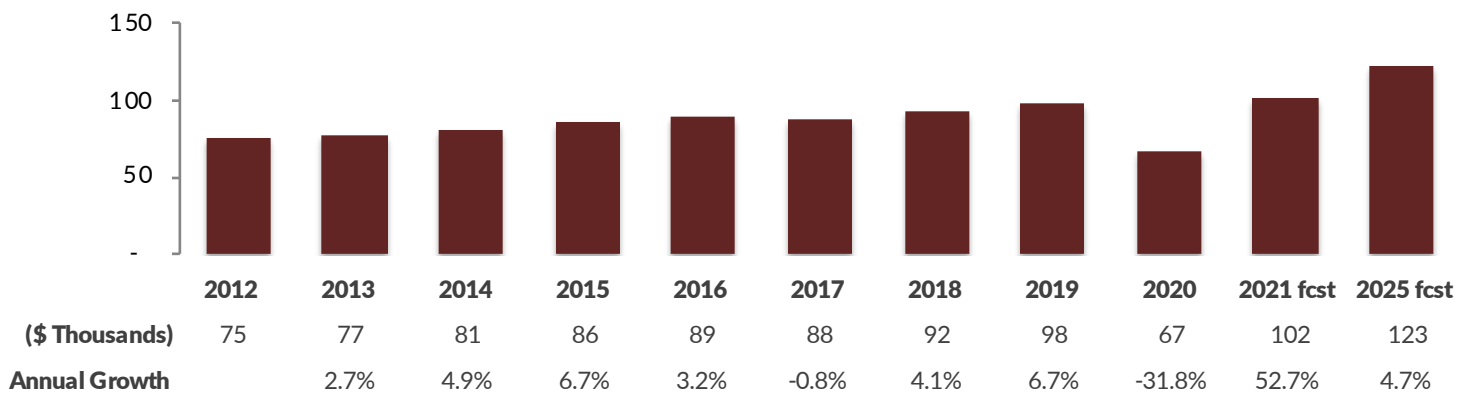
One of the consistently difficult strategic questions for every company is "are we paying our people the right amount?" In the next sections, we'll tackle this question from many different angles. The first benchmarks below cover payroll per employee, retailer and location. In particular, payroll per employee is a strong metric to benchmark against, both in terms of the dollar figure but also the historical and forecasted growth.

Payroll per Employee



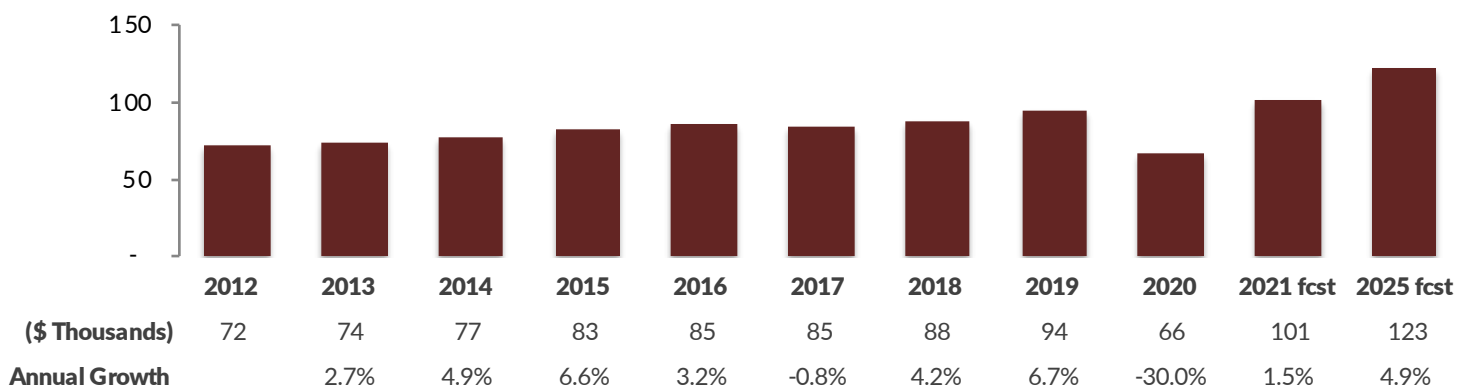
Compound Annual Growth Rate **2.3%** 3-Year **1.3%** 5-Year

Payroll per Retailer



Compound Annual Growth Rate **-8.8%** 3-Year **-5.0%** 5-Year

Payroll per Location



Compound Annual Growth Rate **-8.0%** 3-Year **-4.5%** 5-Year

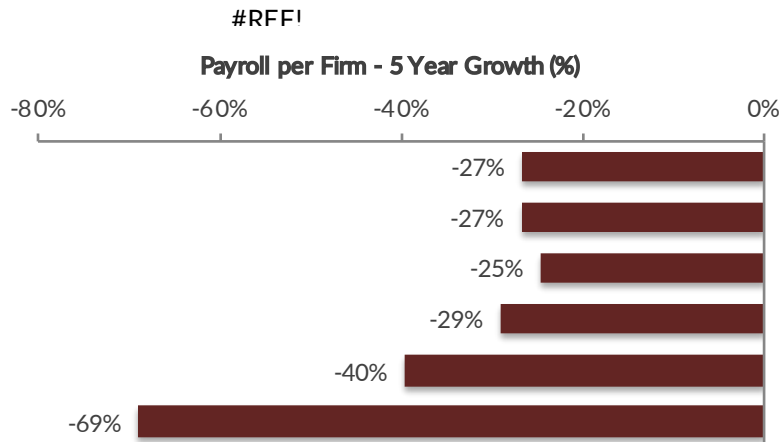
Payroll by Business Size

Payroll by business size metrics can create insights into how different size companies are fairing and how they pay for talent. Typically, the payroll per employee by business size (last chart) tells an interesting story about how different size retailers compensate their talent.

Florists

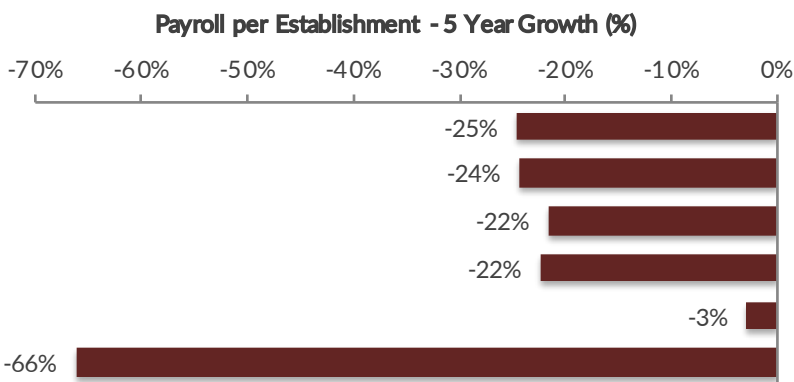
Payroll per Retailer (\$000s)

Business Size	2015	2020
0-4	34	25
5-9	110	81
10-19	244	184
20-99	687	487
100-499	1,867	1,128
500+	3,599	1,120



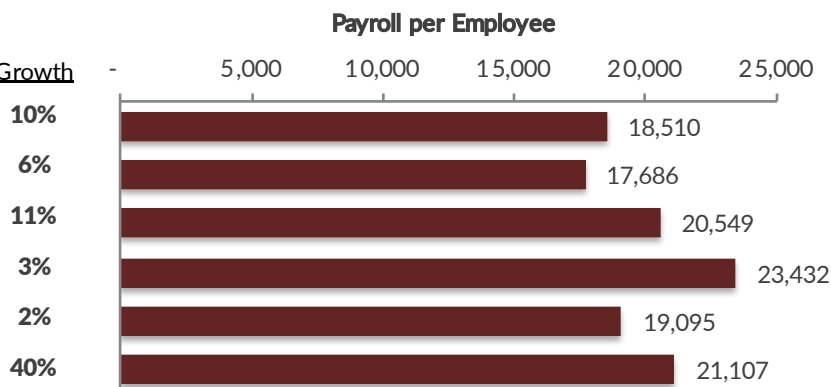
Payroll per Location (\$000s)

Business Size	2015	2020
0-4	34	26
5-9	108	81
10-19	218	171
20-99	408	317
100-499	232	225
500+	392	133



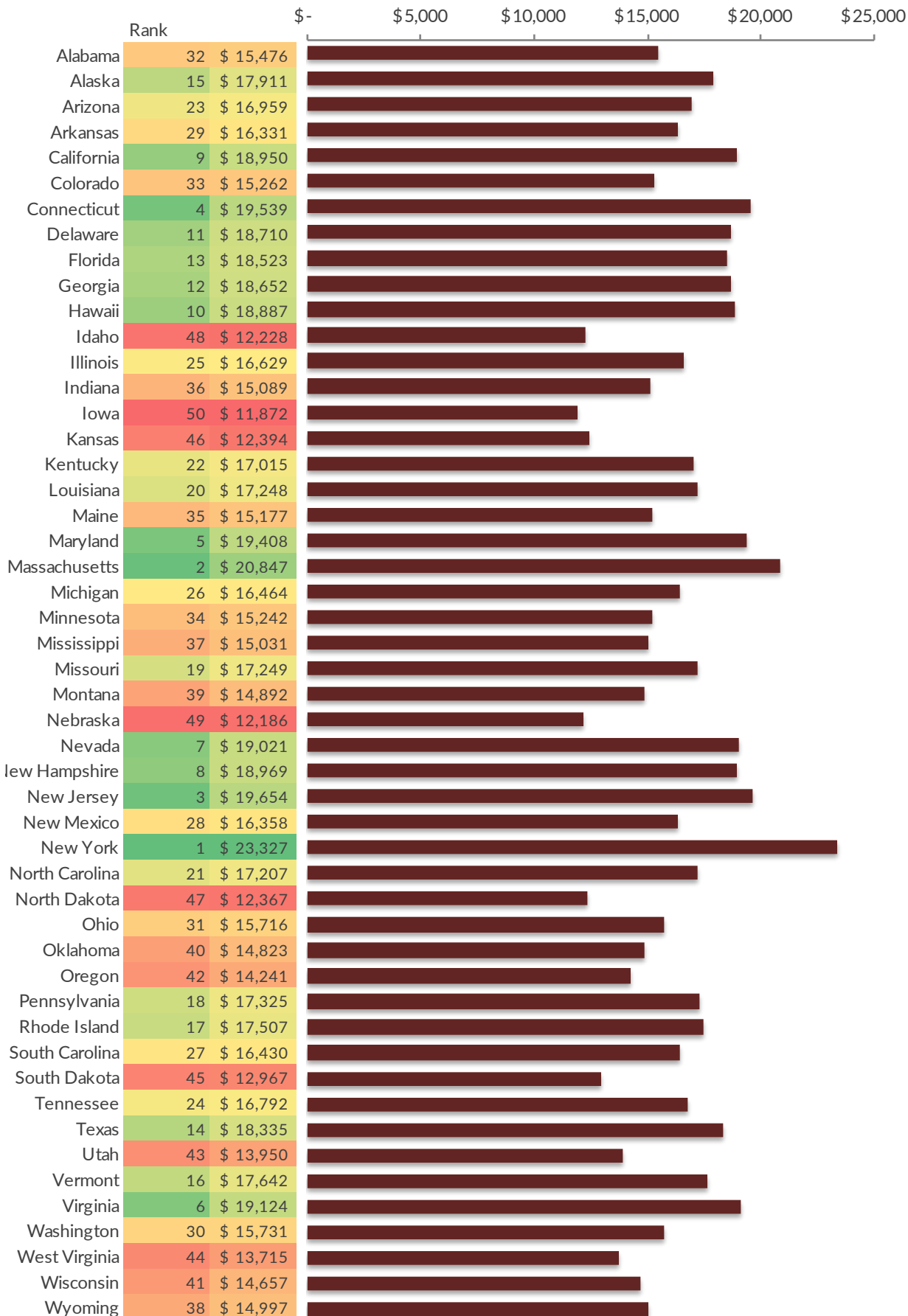
Payroll per Employee (\$)

Business Size	2015	2020	Growth
0-4	16,833	18,510	10%
5-9	16,732	17,686	6%
10-19	18,489	20,549	11%
20-99	22,776	23,432	3%
100-499	18,698	19,095	2%
500+	15,104	21,107	40%



Payroll per Employee by State

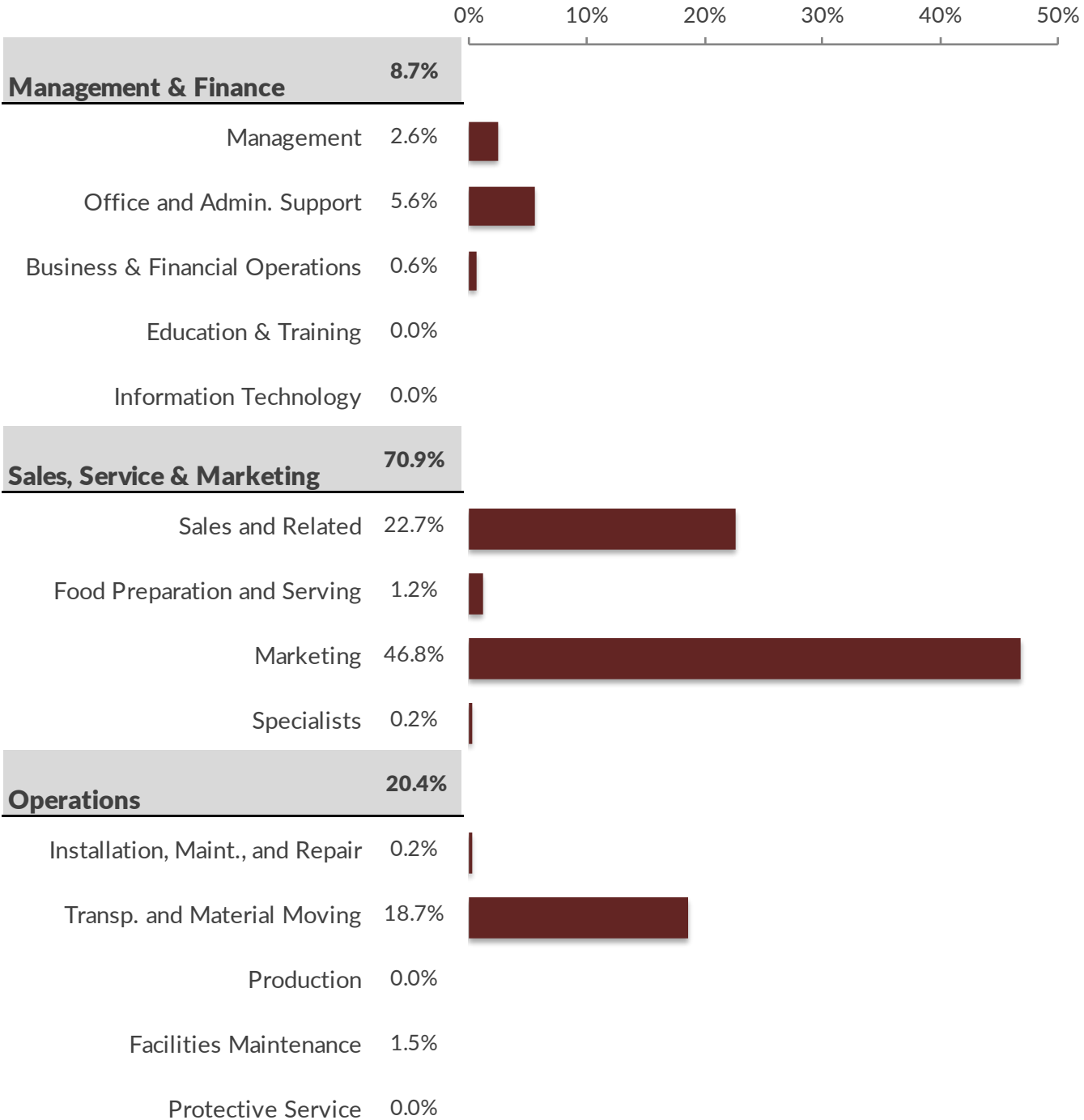
The competition for talent is local, with the supply and demand dynamics of each state driving compensation. When it states "no data", there wasn't a sufficient sample size of data for the state.



Job Categorization Benchmarks

Ensuring your company has the right people in the right roles, is just as important as having the right number of people and the proper compensation. Pay particular attention to management ratios, and the three higher-level categories of 1. management & finance, 2. sales, service & marketing, and 3. operations.

Job Categories as a % of Total Employees



Job Categorization Pay Ranges

For those roles and people who are critical to the success of your business, it is important to understand how their compensation compares to the pay ranges of the industry. Below are the pay ranges of the high-level job categories. The bottom 10% represents the average that the 10% lowest paid receive in hourly pay, while the top 90% represents the average that the 10% highest paid receive in hourly pay. In those instances where the sample size was not statistically significant, the figures are left blank.

Florists

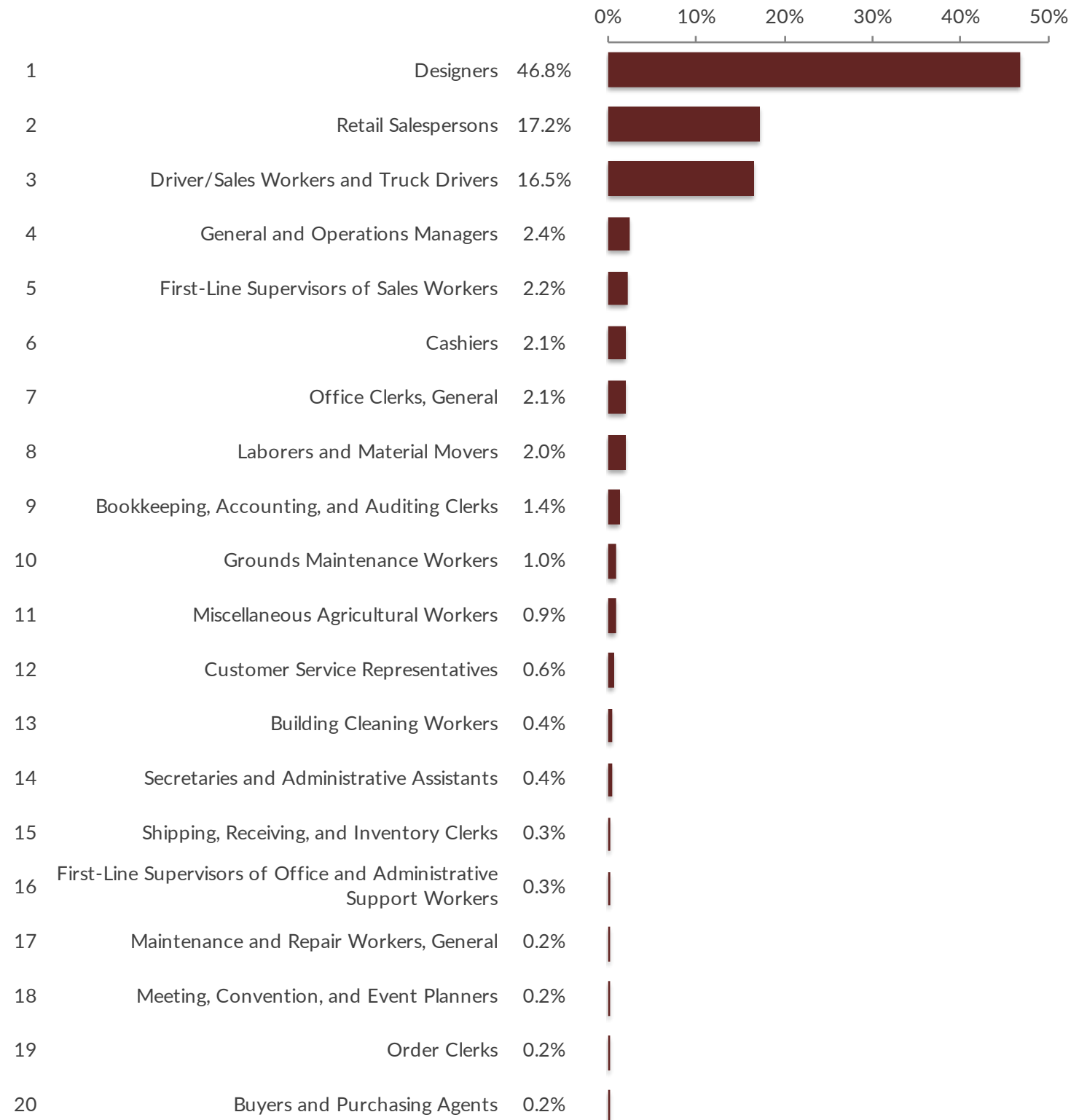
Industry Pay Ranges

	Bottom 10%	Bottom 25%	Mean	Top 75%	Top 90%
Management & Finance					
Management	\$13.48	\$18.19	\$35.42	\$41.76	\$64.79
Office and Administrative Support	\$9.37	\$11.52	\$15.88	\$18.80	\$24.47
Business and Financial Operations	\$13.26	\$17.19	\$23.84	\$30.24	\$36.74
Education & Training	no data	no data	no data	no data	no data
Information Technology	no data	no data	no data	no data	no data
Sales, Service & Marketing					
Sales and Related	\$9.42	\$10.83	\$14.80	\$15.66	\$21.66
Food Preparation and Serving	\$9.96	\$10.70	\$12.16	\$12.86	\$14.90
Marketing	\$9.45	\$11.18	\$14.47	\$16.85	\$20.62
Specialists	no data	no data	no data	no data	no data
Operations					
Installation, Maint., and Repair	\$10.03	\$11.51	\$14.76	\$17.47	\$19.32
Transp. and Material Moving	\$9.34	\$10.73	\$13.63	\$15.25	\$19.45
Production	no data	no data	no data	no data	no data
Facilities Maintenance	\$9.68	\$12.18	\$16.14	\$18.87	\$24.22
Protective Service	no data	no data	no data	no data	no data

Top Detailed Jobs Analysis

The below metrics go into the details of the industry's top jobs ranked by percent of total employment.

Top Detailed Jobs - Percent of Total Employment



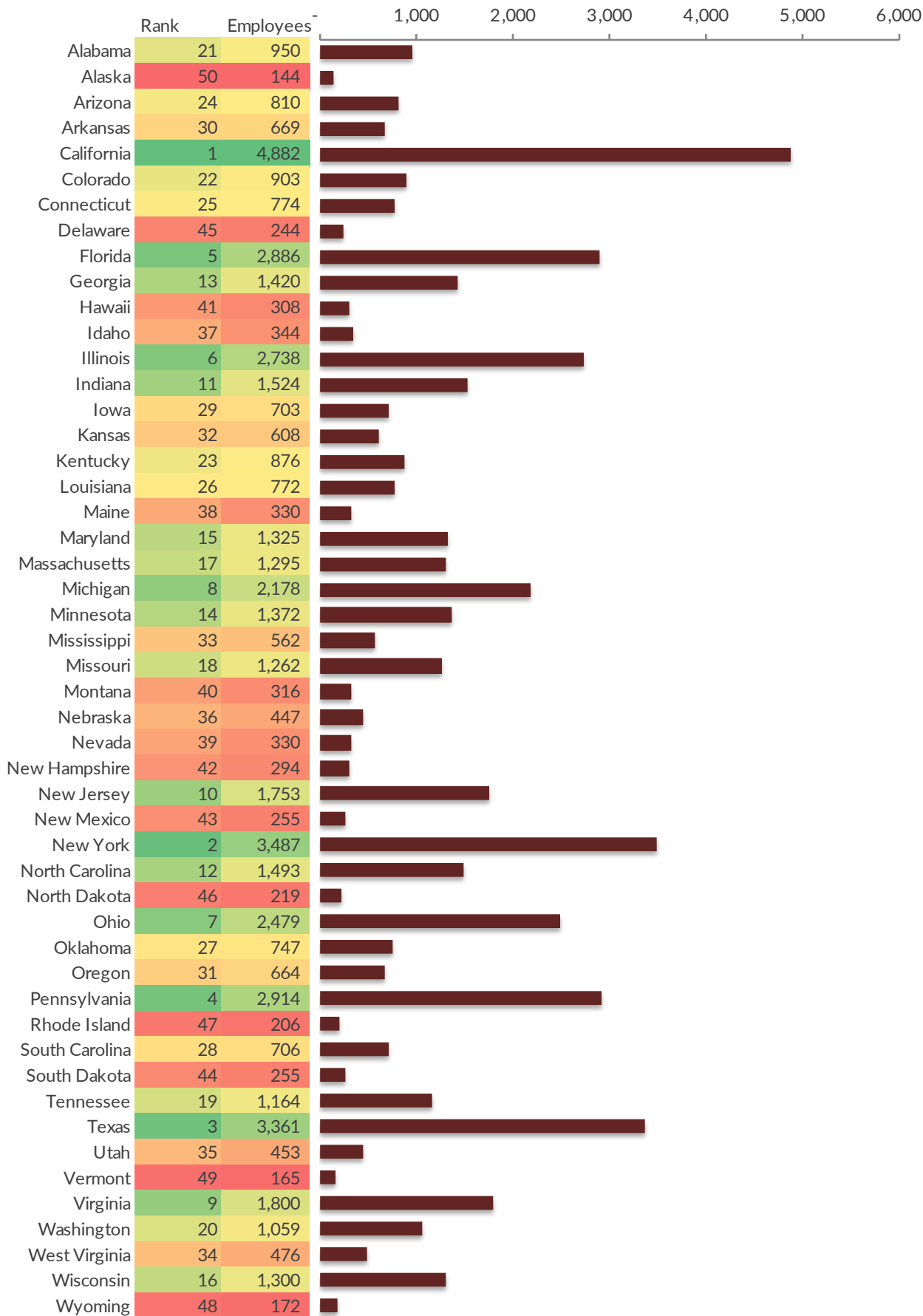
Top Detailed Jobs Analysis

Below are the details of the wage bands for the industry's top jobs. The bottom 10% represents the average that the 10% lowest paid receive in hourly pay, while the top 90% represents the average that the 10% highest paid receive in hourly pay. In those instances where the sample size was not statistically significant, the figures are left blank.

Top Detailed Jobs - Pay Bands		Bottom 10%	Bottom 25%	Mean	Top 75%	Top 90%
1	Designers	\$9.45	\$11.18	\$14.45	\$16.83	\$20.57
2	Retail Salespersons	\$9.36	\$10.76	\$13.82	\$15.12	\$18.72
3	Driver/Sales Workers and Truck Drivers	\$9.27	\$10.56	\$13.48	\$15.10	\$19.39
4	General and Operations Managers	\$13.29	\$17.82	\$33.85	\$40.64	\$58.99
5	First-Line Supervisors of Sales Workers	\$13.43	\$16.31	\$23.48	\$26.45	\$35.21
6	Cashiers	\$8.93	\$9.81	\$11.99	\$13.84	\$15.37
7	Office Clerks, General	\$9.20	\$10.83	\$15.03	\$17.86	\$22.89
8	Laborers and Material Movers	\$10.39	\$12.16	\$14.54	\$16.42	\$19.57
9	Bookkeeping, Accounting, and Auditing Clerks	\$9.71	\$12.33	\$16.60	\$19.80	\$25.63
10	Grounds Maintenance Workers	no data	no data	no data	no data	no data
11	Miscellaneous Agricultural Workers	\$9.53	\$10.72	\$13.19	\$14.63	\$18.70
12	Customer Service Representatives	\$8.84	\$10.26	\$13.22	\$14.74	\$19.40
13	Building Cleaning Workers	\$8.40	\$9.32	\$11.72	\$12.64	\$15.75
14	Secretaries and Administrative Assistants	\$9.55	\$13.07	\$16.51	\$18.42	\$22.73
15	Shipping, Receiving, and Inventory Clerks	\$10.94	\$12.82	\$16.80	\$19.92	\$24.96
16	First-Line Supervisors of Office and Administrative Support Workers	\$14.87	\$17.40	\$23.55	\$28.47	\$37.88
17	Maintenance and Repair Workers, General	\$10.02	\$11.48	\$14.57	\$17.35	\$19.17
18	Meeting, Convention, and Event Planners	\$13.19	\$16.52	\$22.01	\$25.95	\$32.86
19	Order Clerks	\$9.19	\$10.75	\$14.06	\$16.43	\$18.97
20	Buyers and Purchasing Agents	\$13.19	\$15.20	\$23.42	\$31.43	\$36.44

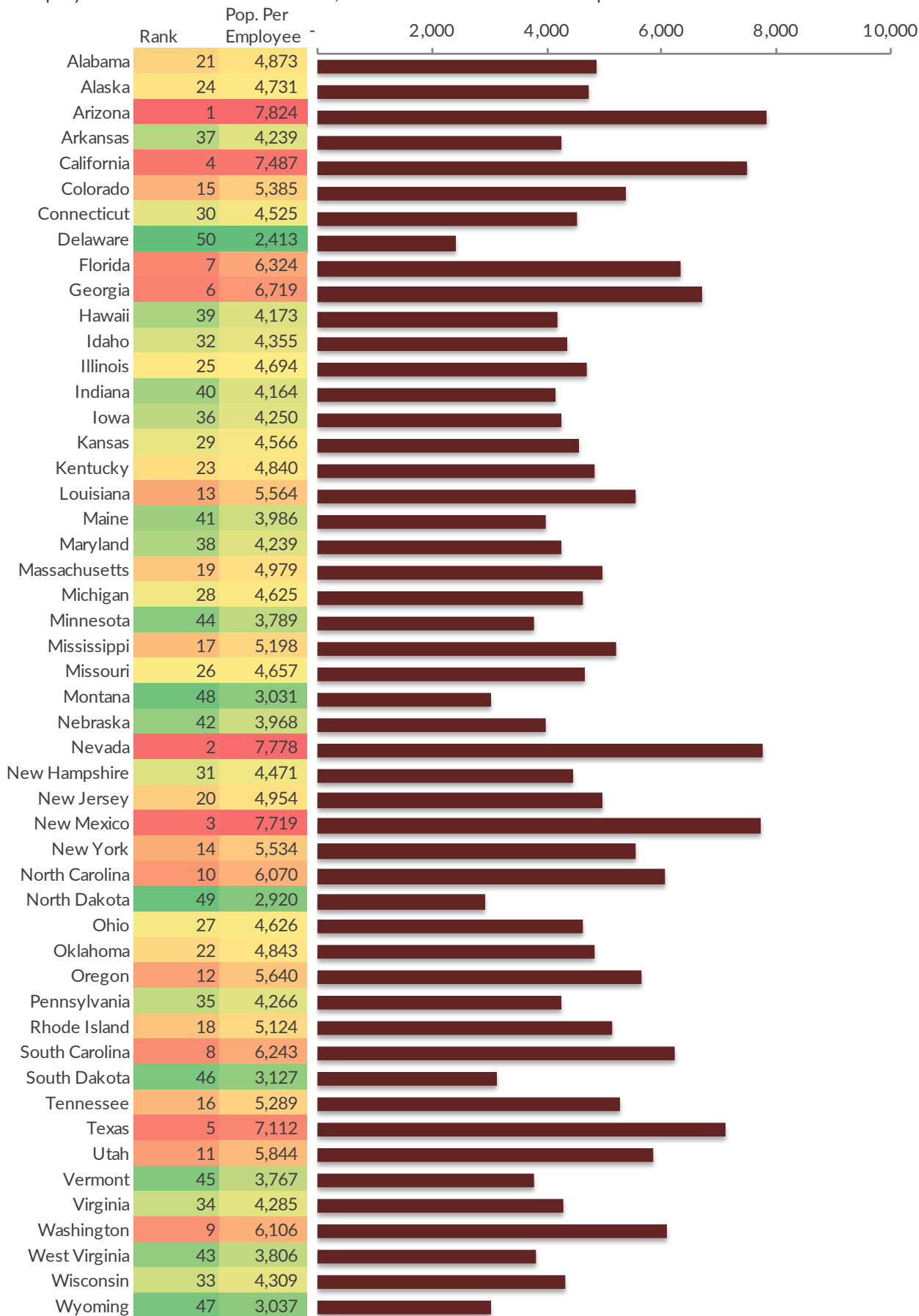
Total Employees by State

It is always good to know how large the industry talent pool is in a state. When it states "no data", there wasn't a sufficient sample size of data for the state.



State Population to Every Industry Employee

Below is one of more entertaining metrics which is simply how many people in a state there are per each industry employee. When it states "no data", there wasn't a sufficient sample size of data for the state.



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