

# First Industry Survey Establishes Benchmarks

By Bruce Shank

Considering how much is known about the golf industry, it is astounding that so little is recorded about the rest of the institutional landscape maintenance industry. Even organizations dedicated to management of parks, schools, colleges and universities, and professional sports teams have little idea about their industries' investment in products and services related to turf and landscape management. The management of *sportsTURF* and the Sports Turf Managers Association thought it was time to dig for these numbers. STMA employed Smith Bucklin Associates to tabulate the results from questionnaires mailed to more than 2,000 subscribers of the magazine. Response was greater than ten percent and represented the park, school, college and university, and professional sports circulation of the publication.

Approximately how much do you spend total annually on all products and services?

Total Answer	Total	Pro Sports Turf Facility	College /Univ Facility	Parks & Rec.	School District	Ext. AG. /Educ.	Other
	100.0	100.0	100.0	100.0	100.0	-	100.0
\$0	1.1	-	-	2.0	-	-	-
\$1 - 1,000	-	-	-	-	-	-	-
\$1,001 - 5,000	13.4	11.1	14.3	10.9	16.7	-	25.0
\$5,001 - 10,000	14.5	11.1	25.0	11.9	16.7	-	12.5
\$10,001 - 20,000	21.2	33.3	17.9	22.8	20.0	-	-
\$20,001 - 50,000	27.4	22.2	25.0	32.7	20.0	-	12.5
\$50,001 - 100,000	12.3	-	10.7	12.9	13.3	-	25.0
Greater than \$100,000	10.1	22.2	7.1	6.9	13.3	-	25.0
Mean	\$41,481.69	64,711.11	32,234.29	36,849.29	43,784.50	-	\$97,512.50

\*Figures are percentages.

Approximately how many total fields do you and your staff manage?

Total Answer	Total	Pro Sports Turf Facility	College /Univ Facility	Parks & Rec.	School District	Ext. AG. /Educ.	Other
	100.0	100.0	100.0	100.0	100.0	100.0	100.0
0	1.3	-	-	1.5	-	-	20.0
1 - 5	24.6	84.6	43.8	9.9	40.0	-	20.0
6 - 10	20.1	7.7	28.1	17.6	25.0	-	20.0
11 - 20	25.9	-	21.9	34.4	12.5	-	20.0
21 - 30	9.8	-	3.1	13.7	5.0	-	-
31 - 50	10.7	-	3.1	11.5	15.0	-	20.0
51 - 100	3.6	-	-	6.1	-	-	-
Greater than 100	4.0	7.7	-	5.3	2.5	-	-
Mean	14.8	6.0	8.53	31.20	15.35	-	13.20

\*Figures are percentages.

After making every effort to be conservative in our estimates and calculations, we are now able to draw some conclusions about the size of the non-golf, institutional landscape maintenance industry. By combining the four industries discussed above, the non-golf segment of the market spent approximately \$800 million on products and services for turf and landscape construction and maintenance in 1993. This does not include salaries, a figure that easily could exceed \$400 million.

A joint survey by the National Golf Foundation and the Golf Course Superintendents Association of America (GCSAA) places the golf segment in the neighborhood of \$1.4 billion. It should be no surprise that the golf industry spends more in this area than other institutions. Nevertheless, the non-golf segment is a substantial buyer of products and services.

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## Industry Survey

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### Average Expenditures

How the data compares among the different non-golf segments is perhaps most interesting. The undisputed leader in expenditures is the manager of a professional sports facility. The average amount spent in a single year on turf-related products and services by one of these facilities is \$65,000. This is divided among an average of six fields for a per field expense of \$12,000. This most likely reflects one primary field and four or five practice fields. Projected to 800 professional sports facilities and this segment spends more than \$50 million per year on products and services.

The most efficient provider of sports fields is the superintendent of parks. He or she spends an average of \$37,000 (\$1,200 per field) per year and is responsible for 31 fields. Altogether parks spend close to \$180 million on landscape products and services.

School groundskeepers spend more on landscape products and services than any other segment, a projected \$350 million per year. They are responsible for

### The highest level of education you have completed:

	Total	Pro Sports Turf Facility	College /Univ Facility	Parks & Rec.	School District	Ext. AG. /Educ.	Other
<b>Total Answer</b>	100.0	100.0	100.0	100.0	100.0	100.0	100.0
<b>High School</b>	9.0	23.1	2.9	9.6	11.9	-	-
<b>Some College</b>	14.8	15.4	14.3	16.3	9.5	-	15.4
<b>Two Year Jr College /Vocational</b>	11.1	15.4	14.3	9.6	11.9	-	15.4
<b>Four Year Undergraduate</b>	37.7	38.5	37.1	40.7	26.2	-	46.2
<b>Advanced Degree Masters/Doctorate</b>	27.5	7.7	31.4	23.7	40.5	100.0	23.1

\*Figures are percentages.

an average 15 fields and spend \$2,850 per field.

The second largest segment includes colleges and universities. They spend a total of \$195 million on products and services. They manage an average of nine fields at a cost of \$3,800 per field. This is higher than parks because of stadium maintenance.

More than 80 percent of respondents

are responsible for making purchasing decisions. The highest percentage responsible was at professional sports complexes (90%) and the lowest at school districts (70%). Despite this responsibility, the average professional sports complex manager has less formal education than the other three segments, 60 percent have at least two years of college. Another misconception

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is that the person responsible for making field decisions at schools is someone on the janitorial staff. In fact, the decision makers at schools had more advanced education than any other segment, strongly suggesting that decisions are made on a district level by an administrator. Colleges and university sports turf managers had the next most formal education. Overall, two thirds of sports turf managers have completed a bachelor's degree. They have been employed in the profession for an average of 14 years.

#### Purchases

Sports turf managers spend more on equipment than anything else, an average of \$28,000. Colleges and universities spend an average of \$41,000 with parks spending \$30,000. Schools spend \$18,000 and professional sports facilities \$9,500.

Irrigation is the second greatest expense, partly do to the cost of water. Sports facilities overall spend \$14,000 on irrigation. Fertilizer is next on the budget list with an average of \$8,200 per year. Professional facilities spend nearly three or four times more on fertilizers than other facilities.

Seed and sod expenditures average a strong \$6,200 per year with schools spending an average of three times that amount.

The average cost of chemicals purchased is \$6,000, the professional facility spending nearly four times the average. Schools spend half the average and parks fit the average perfectly. Colleges and universities spend \$4,100 per year on chemicals.

We must stress that this data is a first effort at creating benchmarks for the non-golf segment of the sports turf industry. It can and will be refined and expanded over time. The expenditures by facility are the most reliable available. If any improvement is called for, it would be in the precise size of the universe by number of facilities. That is where the emphasis will be placed in the coming year.

Any suggestions to improve the survey are invited and will be reviewed by STMA and the magazine staff for inclusion in next year's survey. □

#### Are you responsible for making purchasing decisions for equipment and supplies?

	Total	Pro Sports Turf Facility	College /Univ Facility	Parks & Rec.	School District	Ext. AG. /Educ.	Other
Total Answer	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Yes	80.9	90.9	76.5	84.8	70.7	-	84.6
No	19.1	9.1	23.5	15.2	29.3	100.0	15.4

\*Figures are percentages.

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