

# Turf managers lead an \$11 billion industry

BY RICH KING

Where do you start to review a Sports Turf Managers Association membership survey with 97 questions measuring member satisfaction, demographics, participation, job parameters, labor distribution and budget information? First, you say “thanks” to those who participated. Your responses are the foundation of the first comprehensive study of the sports turf management industry. With your help, we have a representative sampling of STMA membership that can be used to project industry-wide economic numbers.

## Survey methodology

STMA conducted the survey in February 2001. A total of 1,841 surveys were mailed to active STMA members, who were requested to complete and return them by

March 19. By the deadline, 393 completed surveys were received, a 21.3% response rate. In Figure 1, the blue line reflects the percentage of the total mailed surveys by Facility Type and the pink line marks the percent returned. That the two lines track together is clear indication that no membership category is over- or under-sampled. Since this analysis draws conclusions for the entire membership, balanced sampling is required. Based on Figure 1, we are confident that the conclusions are valid.

## Member satisfaction

The Satisfaction Chart, Figure 2, is based on responses regarding the level of satisfaction with several of STMA’s key membership services. The response options in the survey were “very satisfied,” “satisfied,” “neutral,” “dissatisfied,” and “very dissatisfied.”

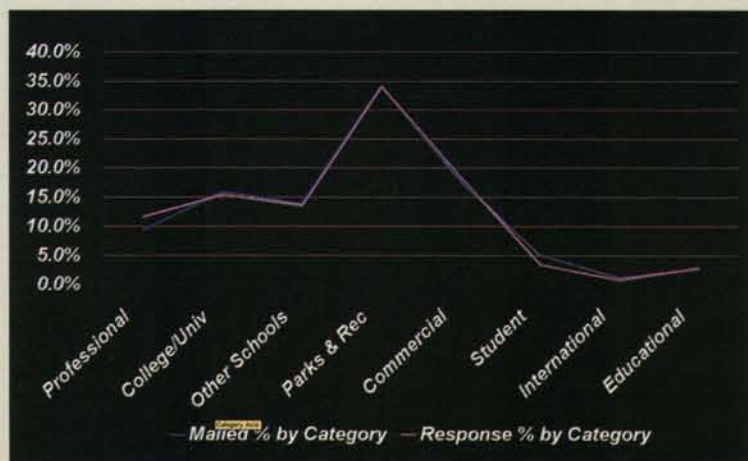


Figure 1 (Survey Breakdown by Category)

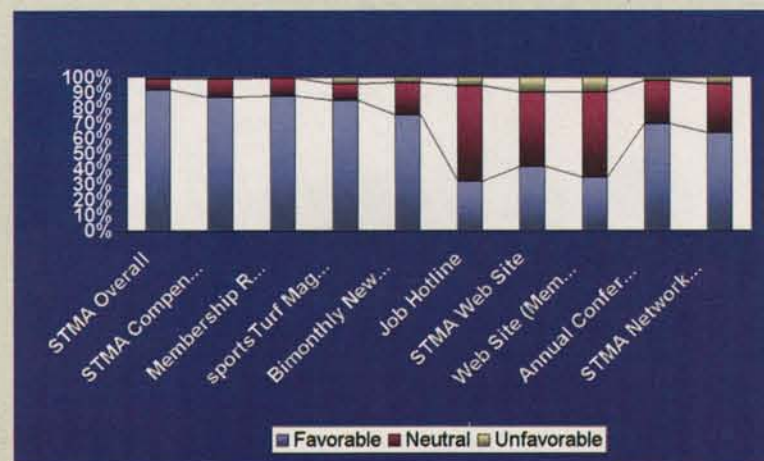


Figure 2 (STMA Satisfaction Chart)

For the ease of presentation, the “very satisfied” and “satisfied” ratings are combined into a favorable category and “very dissatisfied” and “dissatisfied” are combined into an unfavorable category. The chart measures the degree to which STMA members are “happy with the product.”

Overall satisfaction with STMA services is quite high at 92.3% favorable, compared to just 0.8% unfavorable and 6.9% neutral, which shows that STMA is effectively assisting turf managers to accomplish excellence. Without a doubt, teamwork of the STMA Board of Directors, Committees, Chapters, Members, and Headquarters is the reason for high satisfaction. It indicates that “STMA matters” to current members and, based on their endorsement, potential members will find value in STMA in practical, tangible ways.

The next four categories, from left to right, on the Satisfaction Chart received high marks and few low marks. Leading the way is the Compendium of Articles (87% favorable rating), Membership Roster (85.9%), *Sportsturf* Magazine (85%), and the Bi-monthly Newsletter (75%). Each of these four “hands-on” resources received 4% or less unfavorable ratings. Neutral ratings for this group ranged between 10.7% and 12.2%, except for the Bi-monthly Newsletter, which received a 21.4% neutral rating. Several respondents wrote in that they were unaware of or had not used some of the services.

The remaining categories fall into the “Try it, you’ll like” group. These are STMA services that members generally like after trying them. For example, members who have used the Job Hotline (32.1% favorable, 5.2% unfavorable) or the STMA Website (41.7% favorable, 9.6% unfavorable) are favorably impressed. Still, several members have not used these services and rated them neutral.

The STMA Website, despite being favorably rated, is an area where there is room for improvement. It is a communication tool within the membership and to the general public. Many of you may know that the website underwent a major overhaul in October 2001. To see the new and improved website, visit [www.sportsturfmanager.com](http://www.sportsturfmanager.com).

The Annual Conference is another example of “try it, you’ll like it.” Figure 2 shows that 69.6% rated the conference favorable, compared to 2.0% unfavorable and 28.5% neutral. However, when looking at the rating of members who have actually attended a conference, the rating jumps to 89.1% favorable versus 1.3%

negative and 9.7% neutral. By the way, two out of three STMA members have attended at least one Annual Conference.

Another noteworthy point about the Annual Conference is location, location, location! Based on the survey results, location attracts first time attendees, but conference programming and location keeps them coming back. Nearly three out of four members that have yet to attend the conference indicated that location is important to their deci-



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**Conference Attendance by Income Level**

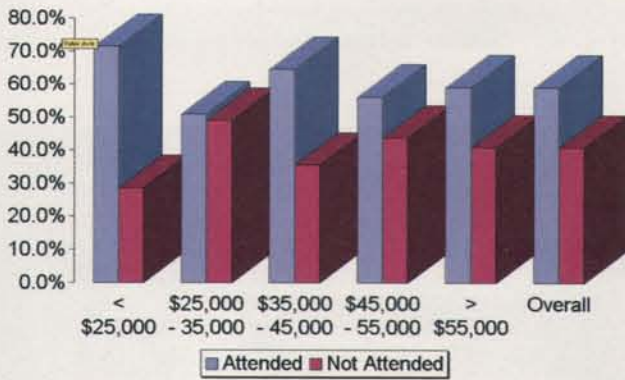


Figure 3 (Conference Attendance by Income Level)

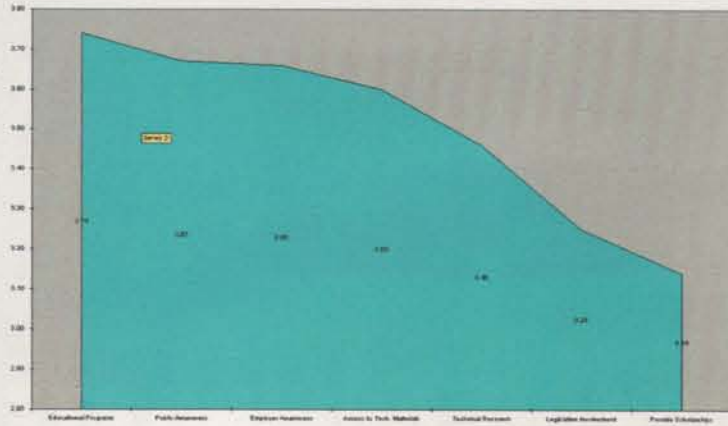


Figure 4 (Where should STMA focus Resources?)

Years of Exp.	Parks & Rec	College/Univ	Other School	Professional
1-3 years	10.6%	7.5%	0.0%	12.8%
4-6 years	20.4%	20.8%	16.3%	20.5%
7-11 years	11.5%	22.6%	20.4%	20.6%
12-16 years	23.0%	15.1%	24.5%	12.8%
17+ years	34.5%	34.0%	38.8%	33.3%

Figure 5

	Parks & Rec	Other Schools	College /Univ.	Professional
< \$25,000	3.6%	9.3%	3.8%	13.9%
\$25 - 35,000	18.8%	30.2%	20.8%	16.7%
\$35 - 45,000	30.4%	23.3%	41.5%	22.2%
\$45 - 55,000	25.9%	25.6%	22.6%	16.7%
\$55 - 65,000	14.3%	11.6%	9.4%	8.3%
\$65 - 75,000	3.6%	0.0%	0.0%	16.7%
\$75 - 85,000	3.6%	0.0%	0.0%	0.0%
> \$85,000	0.0%	0.0%	1.9%	5.6%

Figure 5

Education Levels	Parks & Rec	Other Schools	College /Univ.	Professional	Total
H.S. or GED	5.5%	10.0%	5.3%	4.5%	6.1%
Some College	21.1%	38.0%	19.3%	29.6%	25.1%
Assoc. Degree	18.0%	16.0%	21.1%	13.6%	17.6%
BS Degree	44.5%	30.0%	45.6%	50.0%	43.0%
Master's	10.9%	6.0%	8.7%	2.3%	8.2%
Doctorate	0.0%	0.0%	0.0%	0.0%	0.0%

Figure 6

Annual Budget Numbers Projected for US Sports Turf Managers (\$1,000's)

Facility Type	N	Personnel	Material	Equipment	Other	Total
Professional	296	\$54,945	\$36,838	\$14,846	\$22,824	\$129,454
College/University	2,418	\$467,808	\$146,313	\$76,242	\$62,053	\$752,416
Other Schools	19,500	\$2,679,924	\$1,175,265	\$595,550	\$764,186	\$5,214,924
Parks & Rec.	6,500	\$2,174,315	\$1,107,548	\$651,118	\$980,096	\$4,913,077
All Facility Types	28,714	\$5,376,992	\$2,465,964	\$1,337,756	\$1,829,159	\$11,009,871

Figure 9

Projected Number of Acres by Facility Type for US Sports Turf Managers

Facility Type	**N	Softball	Baseball	Football	Soccer	Other	Multi-Use	Non-Ath	Type Total
Professional	296	24	1,316	1,102	99	1,710	469	740	5,459
College/University	2,418	4,745	6,342	12,501	9,490	6,250	11,862	154,022	205,211
Other Schools	19,500	104,000	153,214	143,929	128,607	151,821	1,016,786	3,017,857	4,716,214
Parks & Rec.	6,500	114,813	102,813	35,750	163,500	99,563	133,250	1,250,188	1,899,875
All Facility Types	28,714	223,581	263,684	193,281	301,695	259,344	1,162,366	4,422,807	6,826,758

Figure 10

Projected Number of Fields by Facility Type for US Sports Turf Managers

Facility Type	N	Softball	Baseball	Football	Soccer	Other	Multi-Use	Non-Ath	Type Total
Professional	296	16	343	358	70	203	55	8	1,052
College/University	2,418	2,591	2,245	5,268	4,059	2,677	3,282	3,023	23,144
Other Schools	19,500	79,990	72,827	75,612	79,990	33,827	109,837	27,459	479,541
Parks & Rec.	6,500	74,256	48,412	13,312	65,312	42,016	17,264	10,816	271,388
All Facility Types	28,714	156,852	123,827	94,550	149,431	78,722	130,437	41,305	775,124

Figure 11

Projected Required Number of Employees by Facility Type For US Sports Turf Managers

Facility Type	**N	Total Number of Hours	Average Weekly Hours	Annualized Hours	Required Number of Employees
Professional	296	75,480	255	3,774,000	1,887
College/University	3,300	997,700	302	36,552,100	18,276
Other Schools	7,700	1,362,900	177	172,575,000	86,288
Parks & Rec.	6,500	2,451,444	377	122,572,177	61,286
All Facility Types	17,796	4,887,524	1,111	335,473,277	167,737

Figure 12



sion to attend. Common thinking would indicate that "you must have dough to go" to the conference. Our findings show that all income levels are equally represented at the conference. See Figure 3.

It is apparent that individuals who are involved in Chapter activities are more likely to participate in the Annual Conference. For example, eight of 10 members who have served on an STMA Chapter committee and seven of 10 who have participated in a Chapter educational seminar or workshop have attended the Annual Conference. The conference is STMA's signature event and serves as a gathering spot for the sports turf management industry. Maintaining it and exploring ways to improve it are vital to the industry. Chapter involvement, conference programming, and location influence members to attend.

### Education

STMA is a strong proponent of on-going education for its members. One assumption of STMA's leadership is that our members are equally interested in expanding their turf management knowledge and skills. This assumption was strongly reinforced by survey respondents. When asked "Have you attended any other turf-related educational seminars or workshop?", 94.1% answered affirmatively versus 5.9% negatively.

A future venue for turf management education could be the Internet; 83.2% members indicated that they would use it for educational courses. The 24/7 access Internet provides flexibility that fits even the busiest schedules.

### Certified Sports Field Manager program

Nearly three out of four members voiced interest in the program. Of those who answered that the designation would add value to their current position, 96.9% are interested in becoming a CSFM. Also notable is that 40% of those who believe a CSFM certification would *not* add value are *still* interested in the program. These findings reflect a desire for excellence and professionalism.

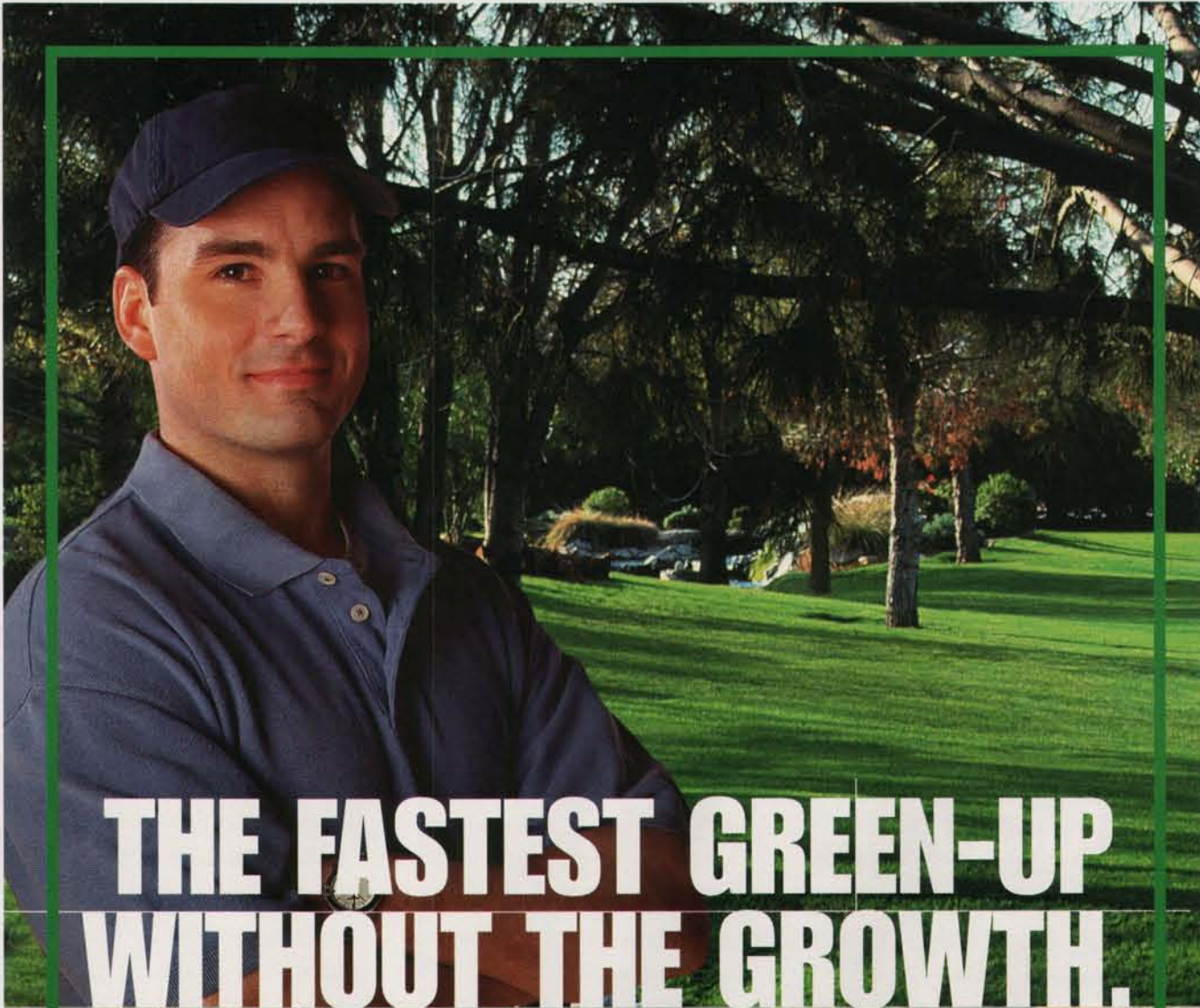
### STMA initiatives

Survey respondents were asked to rate the importance of several STMA initiatives. The range of answers included "very important," "somewhat important," "little importance," and "not needed." Four points were assigned to items rated very important, three for somewhat important, two for little importance, and one for not needed. Figure 4 shows the aver-

age score for each initiative. Based on the respondents' priorities, STMA should focus on educational programs and making the public and employers aware of the importance of the sports turf manager.


### Who are we?

**Experience.** STMA turf managers are very experienced. The average number of




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**Education.** Figure 6 exhibits the breakdown of education levels by Facility Type. Education levels in "Other Schools" are lower than other Facility Types, where only 36% have a BS Degree of higher, while 48% have some college or less. Comparatively, more than 50% of respondents in each of the other Facility Types, have a BS Degree or greater and 30% or less have some college or less.

### National and chapter membership.

Membership in the National STMA or in a Chapter is steady across Facility Type. More respondents, 91.5%, belong to the national association than belong to a chapter, 69.6%. This discrepancy could exist because Chapters are not active in some areas of the country. Figure 7 shows how chapter membership trails national membership among survey respondents on a regional basis, as well.

The survey data is representative of STMA membership and is useful to project the state of the industry, with respect to financial and employment impact. *Sportsturf* reported in a 1994 article an estimated \$1.5 billion financial impact, not including salaries. The projections update that estimate and include employment projections as well as more detailed financial data.

### Methodology

Turf managers at Professional, College/University, Other Schools, and Parks & Rec. facilities responded to a series of questions about their facilities' budgets, number of acres and fields under management, and labor hours. Their responses were multiplied by a projected number of sports turf management facilities across the United

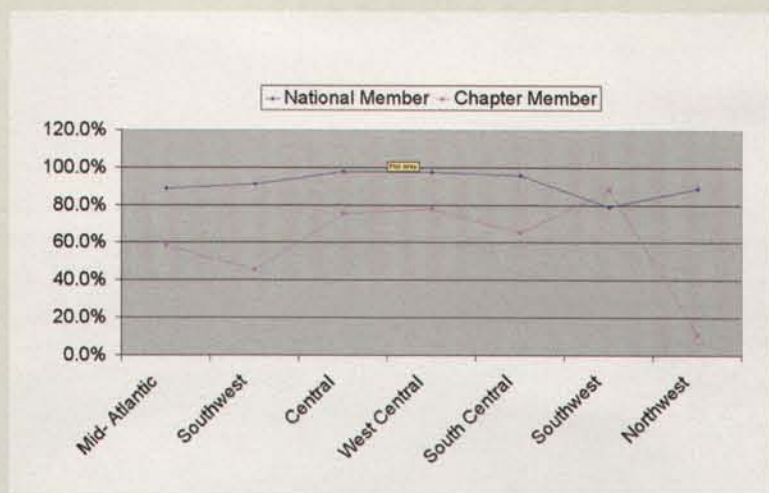


Figure 7 (Membership by Region)

years for all respondents was 13.62 years. In fact, one third of all members have more than 17 years of experience and two of three have been in the sports turf industry more than 7 years. This experience trend is evident for all Facility Types, as shown by Figure 5.

**Salary ranges.** Salary ranges are consistent across Facility Types. The average salary range for all managers is \$40,000 to \$45,000. One exception may be Professional Facility Types that tend to be more heavily represented in the upper and lower ranges and more lightly represented in the middle ranges (see Figure 5).

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## Issues to be addressed

**BASED ON THE SURVEY RESPONSES** STMA will be addressing the following issues:

**Website development**, including expanding the content, improving navigation, providing educational content and/or links to content providers, defining and implementing processes to keep content current, and increase Web traffic.

**Job Hotline.** Include on Website and upgrade telephone recording to voice message.

**Chapter development**, including expanding educational offerings at Chapter level, encouraging all members to get involved, and establishing new Chapters to reach every state.

**Public Relations.** Educating the public using "STMA—Who Are We?" data and initiating a media campaign to extol the benefits of professional sport turf management.

**Career development**, including striving to increase the pay ranges for sports turf managers and working to improve existing education.

Several of these recommendations have been identified in the STMA Strategic Plan. In many cases, efforts, as identified, are under way to improve the services STMA provides its members.



States to provide estimates for the entire sports turf industry. The blue line on Figure 8 shows the number of survey responses to budget questions by type of facility. The pink line is the number of active STMA members by facility type, and the yellow line is the projected number of U.S. sports turf management facilities which totals 28,714. For this chart, "turf management facilities" is a centralized budgeting and turf management entity (e.g., a city's Department of Parks & Rec).

### Financial impact

Ever guess what impact the sports turf industry delivers to the U.S. economy? \$2 billion? \$5 billion? Try more than \$11 billion annually!

The survey collected budget data from turf managers for personnel, materials, equipment, and all other expenses. Figure 9 delineates each budget item further by facility type. The Other Schools facility type represents the largest impact at \$5.2 billion, followed closely by Parks & Rec at \$4.9 billion.

### Managed acres

Another measure of growth is the projected number of acres under professional sports turf management (see Figure 10). An estimated 6,825,758 acres or 10,663 square

miles are currently under management in the U.S. This is equivalent to 8.7 times the size of Rhode Island. One fact that jumps out is the acreage of "Non-Athletic" area maintained by turf managers serving Other Schools and Parks & Rec facilities. If "non-Athletic" areas were removed from the equation, the area under management is still three times the size of Rhode Island.

### Managed fields

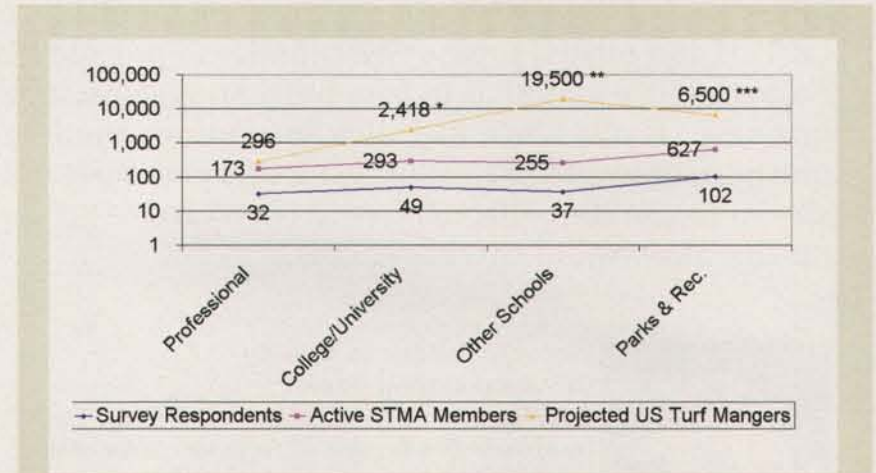


Figure 8 (Projected Number of US Sports Turf Management Facilities)

Note: \* This figure is from the Bluebook of College Athletics, Athletic Publ. Co.  
 \*\* This figure is from the National Directory of High School Coaches, Ath. Publ. Co  
 \*\*\* Estimate from National Parks and Recreation Association

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Also staggering is that nearly 500,000 fields are under the care of professional sports turf managers (see Figure 11). With that many fields, it is easy to understand the \$11+ billion annual budget required to maintain top quality. Other Schools facilities encompassed 61.9% of all fields, followed by Parks & Rec (35.0%), College/University (3.0%) and Professional (0.1%). An interesting trend is that Soccer fields are first or second on the "to do" list for Parks & Rec and Other Schools, but were lower priorities for College/University and Professional facility types. Is Soccer merely a recreational sport or is it a sport in transition that will require additional fields at College/University and Professional facilities? It's a trend to track.

### Employment projections

The STMA survey doesn't predict how many turf managers it takes to screw in a light bulb, but it does help project how many full-time employees are required to maintain America's sports fields. One survey question asked for the "average labor hours per week required to maintain your facility." From the sum of those responses we were able to project 122,188 employees, at various experience levels, are necessary to "get the job done." New math? Not really. The "Average Weekly Hours" is the sum of weekly hours at each facility within a facility type (e.g. for Professional facility types this was 255 hours). To project the "Total Number of Hours," take the "Average Weekly Hours" (255) multiplied by "N" (296), or 75,480. This number is the total hours for 1 week for each Facility Type nationwide.

To annualize that, multiply 75,480 by 50 weeks or 3,774,000, the total number of hours at all Professional Facility Types nationwide. Assuming there are 2,000 hours per annual full-time employee, we divide "Annualized Hours" by 2,000 to arrive at the "Required Number of Employees" (1,887) for U.S. Professional Facility Types.

### Projection summary

The four projection charts, when combined, help us understand the depth and breadth of the sports turf industry. All told, 28,714 facilities maintain more than 775,124 fields, spend more than \$11

billion annually, and employ 167,737 individuals to nurture 10,663 square miles of area. While these are projected numbers, they are the most accurate estimate of the industry's financial and employment data to date. STMA is in a position to redefine the industry. It's not just about watering and mowing grass! The economics revealed above serve notice that the

industry is doing well and will continue to do well as America continues to be a sporting nation.

**ST**

*Rich King analyzed the survey data and wrote this article. He is special projects coordinator for Trusty & Associates, STMA's management company.*

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