Does Wisconsin Need a Turf Industry Survey?

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Scope of the U.S. turf industry

Have you ever stopped to consider how large and comprehensive our turf industry is? It may be larger than you think. Turf influences many lives, and in many ways. Components of the turf industry can be grouped into four branches: turf facilities, manufacturing, servicing, and institutions. Turf facilities is easily the most obvious of the four groups. In this group, most people would be quick to list golf courses and home lawns; sports enthusiasts would add athletic fields. How many people would include the other turfed areas which comprise most of the turf, including airports, cemeteries, rights-of-way, schools, parks, playgrounds, hospitals and other municipal/urban areas. The manufacturing branch is also fairly obvious and includes equipment, seed, sod, fertilizer, chemicals, irrigation, soil amendments, etc. The service group is less obvious to the lay person, but obviously known to turf professionals. This group includes architects and designers, consultants, dealers, publications, and organizations such as the Wisconsin Turfgrass Association. The fourth group, institutions, is perhaps the least obvious. Institutions in the U.S. play a vital role in education and research – included in this group are universities, vocational-technical schools, the USDA, and the extension service.

The last reliable estimate of the U.S. turf industry, using data compiled around 1990, provided a value of $20-30 billion (Watson et al., 1992). Some of the data were derived using turf surveys conducted by individual state turf organizations. One example is the 1989 Ohio turfgrass survey. Annual expenditures in the Ohio turf industry were $1.16 billion – by comparison, the total value of conventional agriculture expenditures was $2.65 billion. Prior to the survey I think few people realized the scope of the turf industry. Other states have shown similar values: Pennsylvania, $1.46 billion (1989), Kentucky, $348 million (1989), and Michigan, $1 billion (1988). In the 10 years since these surveys were conducted, the value of turf has only increased. Three years ago the value of the North Carolina industry was estimated at over $2.5 billion based on an industry survey.

Why do we need a survey?

The marquee reason for conducting a survey is to determine the economic impact turfgrass has on our state. Private companies conduct market surveys to help sell product: we need a survey to sell ourselves politically. The recent Ag 29 ruling is a case in point. When a legislative decision had to be made regarding posting regulations, not only did the environmentalists show up in large numbers compared to the few for the turf industry, but the legislators have no idea of the significance of the turf industry to the state. When the Turf Council of North Carolina took the results of their survey to the state legislature in 1996, the legislature effectively told the group "Turf was insignificant, tobacco was king, tobacco was a $1 billion a year industry in the state." When the legislature finally looked at the survey, they appear to have been jolted into action. In 1997, the state legislature appropriated $250,000 for the

TCNC (Claffey, 1998); in 1998, the amount rose to $500,000. As we struggle to find dollars to conduct applied research for the industry, and struggle even harder to fund extension programs and publications to improve turf management practices, aid sound legislative-decision making, and educate the public, legislative support will be critical to the future of both the turf industry and university-based support. When we consider the number of turf equipment companies which have either headquarters or major manufacturing plants in Wisconsin, I'll bet we can show a value of over $3 billion. Examples include Jacobsen/Textron, John Deere, Toro, Briggs & Stratton, and Kohler engines.

Having a document which describes the value of the turf industry is also needed for building support within the UW system. Currently one can find over one dozen researchers working on cranberries and another dozen working on potatoes at the UW, yet these industries generate less than $600 million each year combined. One of the obstacles the turf industry faces is that it is not recognized as a commodity by the state or federal government, so government-funded surveys are not conducted (with the exception of the sod industry). Yet these same surveys show the value of the cranberry industry may be $250 million, and this generates support for the industry. One of the major complaints I have heard from the industry since I have been in Wisconsin is the absence of a turfgrass pathologist at the UW. During a recent faculty meeting, two key faculty members of that department questioned the need to hire a turfgrass pathologist per se, with the underlying implication that the turf industry was not as important as small grains, for example. Dr. Chris Williamson, our new turf and ornamental entomologist at UW-Madison, has funding for only three years. The position, formerly held by Dr. Chuck Koval, used to be "hard-funded." Again, we need to convince the university administrators of the importance of the turfgrass industry. Without a published survey, it is nearly impossible to build support for the turf industry.

An upcoming issue which will significantly affect the turf industry, including golf courses, is the Pesticide Data Base project being pushed through the legislature by Tom Dawson and the environmental advocacy groups. This will force superintendents and other turf managers to report ALL of their pesticide purchases and applications, including quantities and type of product, to a central location each year. The real fear is the environmental groups will use the information against the industry, highlighting for example how many pounds of chlorothalonil (Daconil) are used and translating this into ounces of product per child and thus shouldn't the compound be banned? Remember what happened to Alar, probably the least toxic of any substances sprayed on apples, back in the mid '80s, just because the environmentalists found out it was used on most of the crop hence most of the public was "exposed". A related issue is the Food Quality Protection Act of 1996. Under this legislation, many of the commonly used pesticides are being re-reviewed by the EPA using strict guidelines for safety and residue levels. One of the goals is to reduce the amount of pesticide released into the environment. There is real potential here that in order to save iprodione (Chipco 26GT in turf, Rovral for crops) for use on a vegetable crop such as carrots, iprodione could be banned for use on turf in order to meet the goal of reduced pesticide use. We need to be able to document the value of the turf industry to thwart legislative actions which would use turf as a scapegoat.

What's involved in the survey

The most important component for conducting the survey is to secure support. Support begins with involvement from the turf industry, UW/extension personnel, and statisticians. Bob Battaglia from the Ag Statistics Service of the Wisconsin Department of Agriculture, Trade, and Consumer Protection has agreed to assist with the survey. I intend to act as a facilitator, mainly raising funding and coordinating an industry oversight committee for the survey. I have already met with the boards of the majority of the turf-related organizations in the state to discuss their support for the survey. The Wisconsin Landscape Federation has already pledged $10,000 to support the survey, and a private company has pledged another $5,000.

I expect the survey to cost approximately $75,000. My estimate is based on what other states have spent, ranging from a low of $35,000 to a high of over $100,000. Actual costs will depend on how much the Ag Statistics Service can provide in terms of personnel to conduct the survey and analysis, publication/mailing costs for the questionnaires and the final document. Much of the industry can be surveyed using mailed questionnaires. Homeowners will need to be surveyed in person–this segment of the industry cannot be ignored because homeowners possess tremendous political clout and will be a majority of the value of the turf industry (in Ohio, homeowners accounted for nearly 60% of turfgrass expenditures).

Timing

I expect to convene an industry oversight committee before the end of March. We will need to meet with the Ag Statistics Service and define our objectives, or what results we want the survey to show. By autumn, I hope to be able to develop the questionnaire and have it printed and mailed during winter of 1999-2000. Homeowners will be surveyed during spring 2000 when they are most likely to be willing to think about their lawns. If all goes well, the results can be analyzed and compiled during the summer and autumn of 2000, with publication of the results during winter 2000-2001.

What can you do?

As a member of the turf industry, you can state your support for the survey to the organization(s) to which you belong (WTA, WGCSA, NGLGCSA, WLF, WSTMA, WSPA, etc.). Eventually we will need to develop funding for the survey. This could come in the form of donations and fund-raising events – golf outings, sale of merchandise or services, etc. If you have comments or questions about the survey, or would like to help, please contact me. I would like to hear from you. John Stier, UW-Horticulture/UW-Extension, 608-262-1624, or jstier@facstaff.wisc.edu.

Literature Cited

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