



IDEAS OF THE FUTURE AT WORK TODAY

IN THE 1990s: MORE PEOPLE... MORE WORK... MORE MONEY...

If you work in one of the green industries and thought you had it good in the 1980s, you ain't seen nothin' yet. Read on.

by Jerry Roche, executive editor

The green industry continues to expand at an amazing rate, according to statistics obtained for this LANDSCAPE MANAGEMENT "State of the Green Industry" report.

For instance, a survey conducted just three years ago indicated that 41 percent of LM's readers were involved in ornamental installation and care. In an exclusive survey conducted this fall, that number zooms to 69 percent as operations have sought provide clients with more services and more diverse and beautiful landscapes.

In the 1986 survey, 49 percent of our readers indicated they purchased fungicides for turf disease control; this year, 73 percent said that they offer disease control.

Though most landscape operations are still small (fewer than five employees), the industry is attracting more workers. In 1988, the survey notes, the average staff was 20.8; in 1988, the average staff was 21.8. Projected to the magazine's full read-

ership, employment rolls totalled 982,231 in 1988 and 1,040,927 in 1989. That, nationally, means at least 60,000 new workers in the industry.

Managerial wages have not changed much. The average LM reader makes \$32,117.24 per year with the bulk of those (64 percent) in the \$20,000 to \$40,000 range.

Despite many concerns (see related article), most landscape managers remain optimistic about the green industry as they head into the 1990s. Almost 20 percent of our readers who took time to return questionnaires rated their outlook perfect 10s on a scale of 1-10. Sixty-five percent gave the industry at least an 8, and the survey average was 7.99.

Here is a quick summary of our findings in the three main segments of the green industry.

Golf: more public?

The golf industry's response to an increased need for more holes has been

good. Yet the average golfer will face long lines by 2000 if private courses continue to proliferate.

Developers see residential/member courses as the quickest way to make money—by selling the course to members as soon as possible. But the "equity" course is not without its disadvantages. Members descend upon the superintendent; everyone's a boss. Policital, stressful situations can follow in this scenario.

Profit, however, can be made from a long-term commitment to public courses. Industry experts see a need for more investor groups interested in one public course for a long time.

Landscaping: more companies

The landscape industry in 1990, according to projections, will be a phenomenal 25 to 40 percent larger than in 1989. Why? Because both homeowners and business owners are putting increased emphasis on good-looking lawns and landscapes.

This virtually uncontrolled growth will probably result in new landscaping contracting companies coming into the market, experts say. As a matter of fact, if 1989 is an indicator of the potential quantity of new companies in the industry, most markets will see the number of companies double.

Government: negativism

There exists among landscape managers in the government sector a degree of pessimism as the 1990s approach. Tax cuts mean cuts in the budgets of governmental institutions. And history has proved that landscaping is the first thing to go.

There is also a need to look at the government landscape manager as environmentalist. Most agree that they must do a better job of communicating. For the public to insist that government institutions abandon pesticides in the landscape borders on the ridiculous, some say.

Summary

The 1990s promise to be different in many ways for the landscape manager, depending on his or her individual field of expertise. But all indications are that the green industry as a whole will continue to grow at a healthy pace—healthy for the industry, healthy for society and, especially, healthy for the environment.

WHAT READERS SAY

When asked what factors would have a financial impact on their operation in 1990, an overwhelming number of LM readers (60 percent) indicated liability insurance. Also high on the list of concerns were equipment maintenance (54 percent) and insurance other than liability (49 percent).

LANDSCAPE MANAGEMENT readers voiced a number of concerns in their open-ended responses to the survey questions. Here are some of their comments:

- "Problem number one is labor; problem number two is insurance."

- "You should send the results of this survey to the heads of government so they can read about the importance of training and proper equipment in this industry."

- "I think golf course construction and multi-family homes around golf courses will continue to increase in the '90s."

- "We are in desperate need of upgrading our status as professionals in this industry. 'Landscapers,' 'arborists,' 'grounds maintenance personnel' and others representative of this field should have accrued a minimum requirement of educational credit or certification in order to get a dealer's license. \$50 is still a small fee to pay to receive all the advantages of established, legitimate businesses trying to pay technical personnel and remain competitive with seasonal operations."

- "Expansion begins in 1990 for our course. We're revamping the back nine and adding nine more holes with a new clubhouse at a cost of \$2.5 million."

- "We need an active organization to control various aspects of the industry, not only for the people in the industry, but for the consumer as well. Public opinion must be improved!"

- "The green industry has hopefully hit bottom in Texas and will have moderate construction growth going into the 1990s."

- "Overall, this industry is overworked and underpaid."

- "Being a golf course superintendent is a thankless job. Most people or owners don't realize the amount of variables involved that affect providing a quality facility. As prepared as you might seem, Mother Nature is always throwing you curves."

- "Operating budgets are becoming tighter as enrollments start to drop because of student age population decrease. We need ideas and help to be able to do more with less."

- "We dropped all maintenance in the spring of 1989 due to insurance and vehicle costs and employee turnovers. We are concentrating on installation and having a great year."

- "Quality-minded individuals in the mowing end of the business are very hard to find and keep."

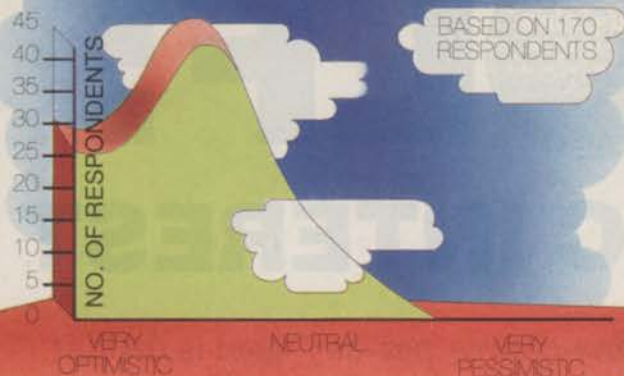
- "Water and governmental regulations could affect the whole industry."

- "As the population increases, the need for open/green spaces increases. Desire for athletic fields, recreation areas and hiking trails is on the increase."

- "One of my main objectives is providing chemical awareness to my customers, so that they know that I am applying the safest and most effective controls."

- "There's a tremendous golf boom in Hawaii. There's a landscape material shortage with all the construction projects, but it's a great time to be in the industry."

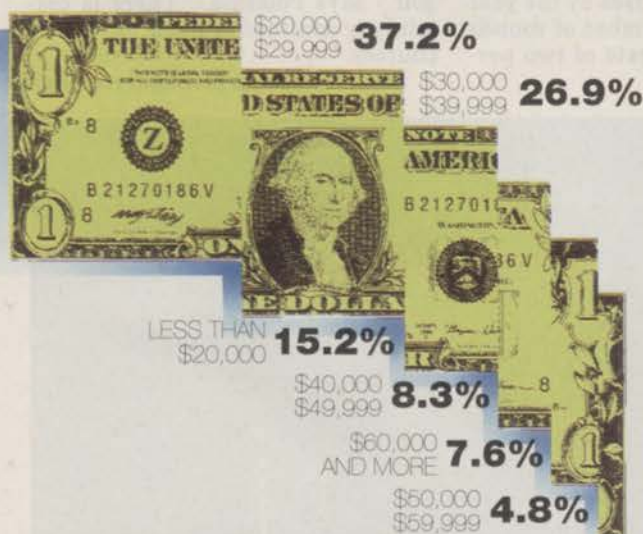
—Jerry Roche □



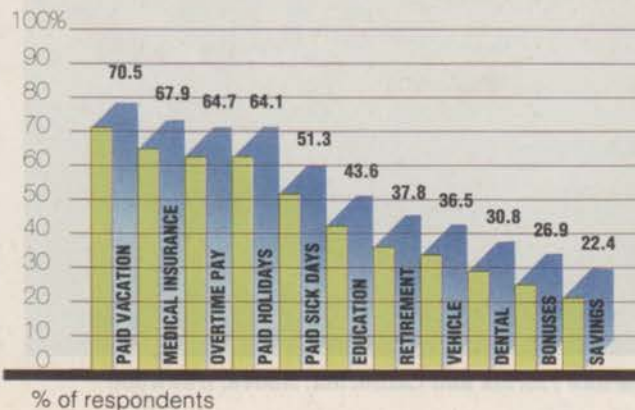
OUTLOOK

FOR THE GREEN INDUSTRY
IN THE 1990s

WAGES ANNUAL WAGES REPORTED BY LM READERS



BENEFITS PROVIDED BY LM READER COMPANIES



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