

Golf maintenance:

a \$6 billion boost to the U.S. economy

**Superintendents
looking — with
much optimism —
to increased
activity in 1995.**

DURING THE HEIGHT of the growing season, almost 200,000 people are working on the nation's golf courses, according to an exclusive survey of the golf maintenance industry by LANDSCAPE MANAGEMENT magazine.

That statistic was determined by multiplying the mean peak-season employment (13.3 people, according to the survey) by the entire universe of U.S. golf facilities (14,648, according to the most recent National Golf Foundation report).

In addition, the golf maintenance industry pumped up to \$6.3 billion into our economy in 1994—an average maintenance budget of \$433,856 according to LM's survey, times the NGF's universe of U.S. courses.

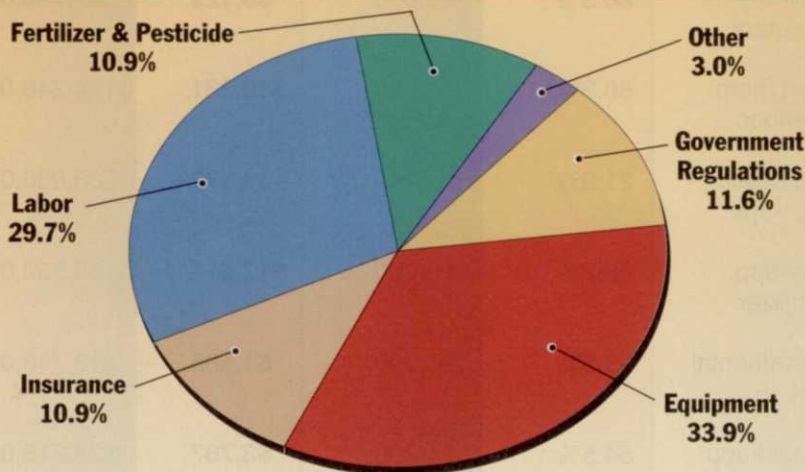
These figures, and others from the survey, are indicative of the increasingly prominent role which the game plays in our society.

"In 1960," observes golf course archi-



Fastest Growing Cost of Golf Course Maintenance

(by % of respondents)



Annual Budgets for Golf Course Maintenance

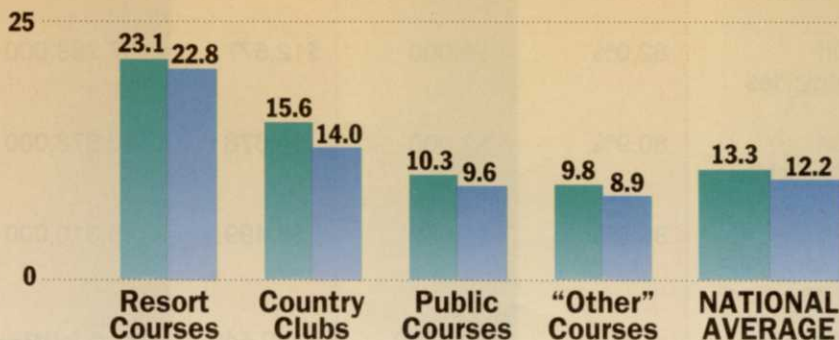
National Average=\$433,856

base:187



Number of Maintenance Employees

base:94



text Jerry Matthews, "there were about 6,300 golf courses in the United States and about 4.4 million players. Since then, the number of courses has more than doubled, and the number of players has quadrupled."

Resort courses, obviously, continue to be at the high end of the spectrum. They employ about 23 maintenance people on the average, compared to 15 for private clubs and 10 for public courses. Resort courses also spend an average of more than \$900,000 on maintenance functions, almost double that of private clubs and nearly triple the amount of public courses.

Good response rate—Our survey was mailed to 991 superintendents in November, 1994. We received 194 completed questionnaires by Christmas, a response rate of 19.6 percent. Forty-four of the 50 states were accounted for, with the highest response from Florida, California and Midwestern states like Indiana, Pennsylvania, Michigan, Illinois and Wisconsin.

By all indications, the industry's growth has not yet started to slow down.

According to the NGF, 358 courses opened in 1993 (the last year complete figures are available) while 671 were under construction and 543 were in planning stages.

Currently-operating courses will see their budgets grow by an average of 4.4 percent in 1995, our survey notes, with public courses seeing the greatest increase, 5.1 percent. The maintenance budgets of private clubs are to grow 4.4 percent, resorts 3.4 percent.

Clearly, most of the growth is coming in the public sector. Of the 1,572 courses under development a year ago, the NGF says, 1,269 were planned to be either daily fee or municipal.

High-ticket items—Where are the nation's superintendents spending their money? According to LM's survey, about \$1.3 billion is used to purchase equipment, fertilizers and pesticides. Most of the rest—about \$5 billion—went toward paying the 200,000 workers (an average of \$20,000 per employee, after miscellaneous expenses).

High on the superintendents' list of "must-have" products are fertilizers, fungicides, turfseed and irrigation equipment.

The industry as a whole (extrapolating

survey averages to LM's total golf readership of 16,093) spent nearly a quarter of a billion dollars on dry-applied fertilizer in 1994, and an additional \$175 million on fertilizer/herbicide combination products. Superintendents also purchased \$118 million worth of turfseed and more than \$100 million worth of irrigation equipment.

It appears from the survey results that those are the very same products superintendents cite as becoming more expensive. When asked what one item's cost

34 percent of superintendents surveyed say equipment costs are growing fastest.

was growing fastest, 33.9 percent of our sample replied "equipment."

Other popular responses to that question were: "labor" (29 percent), "government regulations" (11.6 percent), "fertilizers and pesticides" (10.9 percent) and "insurance" (another 10.9 percent).

Another observation from the survey findings: with the recent emphasis on environmentally-friendly courses, "natural" control products are rapidly catching on. Eighty-two percent of our random sample said they are currently using organic fertilizers in their turf care program. An additional 48.4 percent report using biological controls like *Bacillus thuringiensis*, horticultural oils and soaps for pest control.

Despite the aforementioned increases in the cost of maintaining a well-groomed course, and despite criticism from the media and environmental groups, superintendents remain largely hopeful. When asked how they felt about their industry, 73.7 percent of our survey participants used the word "optimistic." Just 5.2 percent said "pessimistic" and the remaining 21.1 percent were neutral.

—Jerry Roche

Purchasing Power of Golf course Superintendents

PRODUCT CATEGORY	% OF SAMPLE	MEDIAN DOLLARS	MEAN DOLLARS	PROJECTED TO CIRC.
Soil aerators	36.5%	\$5,000	\$8,129	\$47,749,000
Fert./herb. combos	66.3%	\$10,000	\$16,331	\$174,246,000
Domestic pick-ups	21.9%	\$12,100	\$9,372	\$33,030,000
Dry-app. fertilizer	88.2%	\$10,000	\$17,511	\$248,552,000
Ornamental fert.	53.9%	\$1,000	\$1,585	\$13,748,000
Liquid-app. fertilizer	54.5%	\$1,200	\$3,787	\$33,215,000
Post-emerg. herbicides	75.8%	\$2,000	\$3,184	\$38,840,000
Pre-emerg. herbicides	68.5%	\$3,000	\$4,854	\$53,509,000
Small mowers	24.2%	\$1,000	\$1,656	\$6,449,000
Mid-size mowers	11.2%	\$7,750	\$7,790	\$14,041,000
Large mowers	30.9%	\$13,000	\$14,200	\$70,613,000
Turfgrass sod	59.0%	\$2,200	\$4,949	\$46,990,000
Irrigation/sprinklers	78.7%	\$2,000	\$8,082	\$102,360,000
Compact tractors	33.7%	\$11,000	\$13,167	\$71,409,000
Turf fungicides	82.0%	\$6,000	\$12,677	\$167,289,000
Turf insecticides	80.9%	\$2,000	\$4,676	\$60,878,000
Turf-seed	86.5%	\$4,000	\$8,499	\$118,310,000
TOTAL		\$93,250	\$140,449	\$1.3 billion