



# TURFGRASSES IN CHANGING TIMES

“Changing Trends and New Directions”

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# State of the Industry

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b) Projects and margins on construction have increased.  
c) Competition is holding maintenance margins tight.





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2. Sports Turf – The number of new projects moving through design, bidding and installation are increasing. Research on artificial turf impacts is likely an opportunity for natural turf.
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  - a) Slow recovery in construction has finally resulted in shortages of labor, sod and some plant materials.
  - b) Projects and margins on construction have increased.
  - c) Competition is holding maintenance margins tight.
4. Sod – The number of Georgia growers has increased less than 10% and acreage has increased in response to demand. Prices remain firm in 2016.



# Changing Trends on the Macro Level

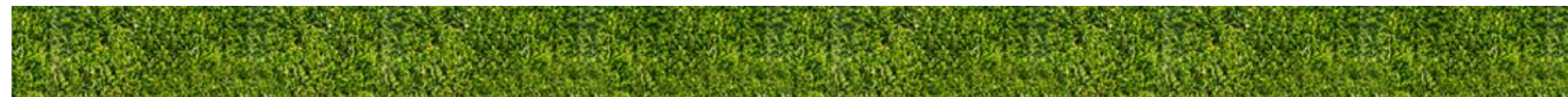
1. Demographics – A Primary Driver
  - a) Generation Z - <18 years old = 73 million or 22%
  - b) Generation Y – 18-35 yrs old = 89 million or 28%
  - c) Generation X – 36-51 yrs old = 60 million or 19%
  - d) Baby Boomers – 52-70 yrs old = 77 million or 24%
  - e) Greatest Gen – 71+ yrs old = 23 million or 7%





# Changing Trends on the Macro Level

1. Demographics – A Primary Driver
  
2. Adaptation to the New Normal
  - a) The “slow growth recovery” means very low GDP and very slow wage growth.
  - b) Renting everything is in vogue – the Sharing Economy is challenging the American dream.
  - c) Consumption and purchasing patterns and processes are changing due to digital media. In the last 15 years digital media consumption has increased from 3% to 40%.





# Changing Trends on the Macro Level

1. Demographics – A Primary Driver
2. Adaptation to the New Normal
3. Government Regulations are Exploding
  - a) Agencies at all levels of government are seizing the moment to expand their reach in response to Federal expansions.
  - b) Regulations are stifling small business establishment and survival.







# Changing Trends on the Macro Level

1. Demographics – A Primary Driver
2. Adaptation to the New Normal
3. Government Regulations are Exploding
4. Technology Drives Innovation and Success
  - a) Mobile applications
  - b) More automation
  - c) Robotics and artificial intelligence increasing
  - d) Social media; cloud based business applications, etc.





# Changing Trends on the Macro Level

1. Demographics – A Primary Driver
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4. Technology Drives Innovation and Success
5. Labor Availability, Work Ethic and Work Mentality
  - a) Impact of multiculturalism.
  - b) Finding and integrating/assimilating personnel.





**“IF YOU DO WHAT EVERYONE  
ELSE DOES YOU CAN ONLY BE AS  
GOOD AS THEY ARE”  
(Ken Mangum)**



# New Directions for Turfgrass Professionals

1. Embracing Change is Critically Important – the rate of change and generation of new knowledge is still accelerating. Become a student of change!
2. Agility Will Define the Successful Individual
  - a) Adopt new technologies quickly and efficiently.
  - b) The new economy demands cost effective and lean operations for profitability.
3. Working “On the business” versus “In the business”. Malcolm Gladwell’s book *Outliers* repeatedly emphasizes the “10,000 Hour Rule” for mastery and success.





# New Directions for the Turfgrass Industry

1. Every industry sector must adjust its outreach and marketing to identify ways to profit amid changing demographics (the Sharing Economy, delayed and changing purchasing patterns for homes, greater emphasis on individual free time, etc.)
2. Research and development of sustainable turfgrass systems will make significantly increasing market impact over the next 10 years. (new turfgrasses, new weed and disease control products, new equipment, etc.)
3. Prepare for and embrace the invasion of the robots.





# New Directions for the Turfgrass Industry

4. Finding, motivating, training and retaining employees will become ever increasing tasks – necessary for integrating change consistently and effectively. Life-long learning will become a more regular work day practice and investment.
5. Capital investment requirements in the industry will become significantly greater and will limit entrance into particularly the landscape and sod sectors.
6. Marketing methods must adapt quickly to changing patterns of consumers in securing information and making purchasing decisions.
7. Support turfgrass research – More important then ever!
8. Constantly evaluate and reinvent!





# SUMMARY

**“We haven’t found the best way to do anything.” (attributed to Dr. Burton)**

**“The more things change the more they stay the same.”**

**QUESTIONS**

