

BRIEFS

JUPITER, Fla. — Jack Nicklaus and several partners have signed a contract to buy 369 acres for a private golf course community to be known as The Bear's Club. The planned private course would not be intended for tournament play but for members only. Nicklaus would design the course, which would be located near his home in Lost Tree Village.

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PINEHURST, N.C. — The Pinehurst Resort and Country Club has banned metal spikes from its eight courses. The policy went into effect Jan. 1. Resort officials say the use of non-metal spikes allows for smoother putting surfaces and will improve the health of the greens.

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DEVIL'S TOWER JUNCTION, Wyo. — A new executive-length course will open in April near the Devil's Tower Monument. The new 18-hole layout sits on 40 acres. It will feature waterfalls, ponds and streams, bridges and mountains, plus a complete golf shop. Kent and Nikki Neiman, longtime residents of the area, will be the owners/operators.

Course development continues strong in Europe

By Dr. FALK BILLION

MUNICH, Germany — Since the new figures (by end of 1997) on the number of courses and golf club members permeate through its players, the European golf industry is becoming aware that there is actually a slow-down in the growth in the numbers of courses.

The increase in numbers of players, however, seems to have sped up again after a slow-down around the middle of the decade.

Here are the latest figures, compiled from the National Golf Federations, one important source being the German Golf Federation:

In those 22 European countries with five or more golf courses each (which excludes most of the Eastern European States) there are some 4,500 courses now in existence.

Dr. Falk Billion (Munich) is a leading German golf course management consultant. Billion is a chartered (certified) golf course appraiser and has been actively involved in more than 120 golf course projects with more than 180 studies, reports and appraisals since he established his office in 1991.

The number has increased by 1,660 over the last seven years. The annual growth rate in the early 90s, as high as over 6 percent, is down to less than 3 percent in 1997.

The three leading countries with the highest numbers of courses are England (1,843), Germany (534) and France (508). That's for the supply side.

Continued on page 78

Golf Courses in Europe in the 1990s

| COUNTRY | 1990 | 1991 | 1992 | 1993 | 1994 | 1995 | 1996 | 1997 | # growth | % growth |
|-------------|-------|-------|-------|-------|-------|-------|-------|-------|----------|----------|
| Austria | 49 | 55 | 67 | 69 | 77 | 83 | 95 | 98 | 49 | 100.0 |
| Belgium | 49 | 49 | 53 | 65 | 71 | 75 | 77 | 77 | 28 | 57.1 |
| Czechia | 8 | 8 | 9 | 9 | 10 | 12 | 12 | 13 | 5 | 62.5 |
| Denmark | 66 | 69 | 81 | 101 | 112 | 117 | 124 | 126 | 60 | 90.9 |
| England | 1,390 | 1,427 | 1,512 | 1,592 | 1,693 | 1,775 | 1,810 | 1,843 | 453 | 32.6 |
| Finland | 59 | 71 | 75 | 77 | 83 | 84 | 89 | 89 | 30 | 50.8 |
| France | 380 | 425 | 456 | 482 | 490 | 490 | 500 | 508 | 128 | 33.7 |
| Germany | 314 | 329 | 353 | 399 | 423 | 464 | 496 | 534 | 220 | 70.1 |
| Greece | 5 | 5 | 5 | 5 | 5 | 5 | 5 | 5 | 0 | 0 |
| Hungary | 1 | 1 | 3 | 4 | 4 | 4 | 4 | 5 | 4 | 400.0 |
| Iceland | 33 | 37 | 39 | 43 | 44 | 47 | 50 | 57 | 24 | 72.7 |
| Ireland | 274 | 276 | 289 | 310 | 321 | 348 | 359 | 367 | 93 | 33.9 |
| Italy | 108 | 117 | 153 | 162 | 180 | 187 | 190 | 200 | 92 | 85.2 |
| Luxembourg | 1 | 1 | 2 | 4 | 6 | 6 | 6 | 6 | 5 | 500.0 |
| Netherlands | 108 | 119 | 128 | 128 | 138 | 155 | 159 | 160 | 52 | 48.1 |
| Norway | 16 | 19 | 25 | 29 | 38 | 42 | 55 | 60 | 44 | 275.0 |
| Portugal | 21 | 26 | 33 | 33 | 36 | 36 | 43 | 48 | 27 | 128.6 |
| Scotland | 422 | 423 | 424 | 428 | 428 | 428 | 471 | 475 | 53 | 12.6 |
| Spain | 103 | 131 | 136 | 145 | 163 | 170 | 180 | 186 | 83 | 80.6 |
| Sweden | 220 | 257 | 349 | 349 | 361 | 361 | 375 | 380 | 160 | 72.7 |
| Switzerland | 40 | 40 | 44 | 46 | 51 | 51 | 56 | 59 | 19 | 47.5 |
| Wales | 123 | 125 | 127 | 130 | 142 | 147 | 152 | 157 | 34 | 27.6 |
| EUROPE | 3,790 | 4,010 | 4,363 | 4,610 | 4,886 | 5,087 | 5,308 | 5,453 | 1,663 | 43.9 |
| # growth/yr | | 220 | 353 | 247 | 276 | 201 | 221 | 145 | | |
| % growth/yr | | 5.8 | 8.8 | 5.7 | 6.0 | 4.1 | 4.3 | 2.7 | | |

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The Toro Company has introduced its Sand Pro 5020 featuring an 18 horsepower engine. It is equipped with Toro's patented three-wheel drive Series/Parallel traction system that virtually eliminates spinouts in forward and reverse. A 3-stage air filtration system provides clean air to the engine keeping it running longer and stronger. The operator-in-mind design increases comfort with tilt steering and adjustable seat. For more information, contact 612-888-8801.

CIRCLE #212

Jacobsen unveils Aero King 30

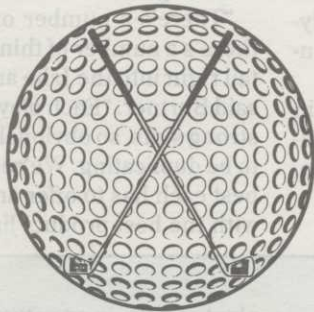
Jacobsen has introduced its new Aero King 30 greens aerator. The new Aero King 30 is powered by an 18-hp Briggs & Stratton Vanguard and offers a 30-inch coring width and a true, 4-inch coring depth. Depending on factors such as soil type, moisture content, past aeration practices and type of tine used, the new Aero King 30 is even capable of coring depths below 4 inches.

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CIRCLE #164

Leslie comment

Continued from page 12

-ness? In his keynote remarks at the International Golf Course Conference and Show in Anaheim, Tour golfer Peter Jacobsen declared that people who operate golf courses should be doing so solely for the betterment of golf. He, in fact, chastised management companies for not having that aim as their key reason for existence. Disregard any thoughts of profit margin.

Jacobsen was speaking to several thousand golf course superintendents, their spouses and others in the industry. And he received whopping applause for that remark.

Excuse me, but "Da!"

Listen, "the betterment of the game" is a wonderful concept, an applause-able concept. If the movers in the industry do not have the game at heart, golf will be done harm to. But to put it alone in everyone's reasons for existence is to achieve the very opposite: put the game in jeopardy.

No organization or business can operate at deficit margins and survive long. Even the First Tee courses will be planned to eventually operate on their own.

How close did Arnold Palmer come to being a golf course builder rather than a professional golfer?

In his pre-taped remarks in accepting the Golf Course Builders Association of America's (GCBA) Don Rossi Humanitarian Award, Palmer told of the time when he was having problems with his game and was having a good time operating a bulldozer.

He said it gave him pause to consider a career. However... "Having spent a little time on a bulldozer, and knowing how much I enjoyed it, and sort of having a little problem with playing golf. It was golf or the bulldozer... well, playing golf won out."

European market

Continued from page 3

On the demand side, nearly 3 million golfers all over Europe had registered as members of a golf club by the end of 1997. There are no reliable European counts on the number of regular golfers not belonging to a golf club. The clubs increased by more than 1 million new members in the course of the last seven years, which means a growth of nearly 60 percent in golfers.

The countries with the highest numbers of club golfers are England (847,794), Sweden (434,010) and Germany (296,370).

Supply and demand compared, 1997 was the year with the fewest new courses opened (145) and the highest count of new golf club members (193,447) over the decade so far.

These figures reveal the fact that the European golf market now definitely has finalized its turnaround from what formerly used to be a supply market to a market that is now lead by demand.

It is the golfers telling the developers and managers of golf courses now what kind of courses, in which locations, with what kinds of fees, they want and which will be able to operate successfully.

Take a look at the golfers vs. golf courses ratio in some European countries and you will understand what I mean:

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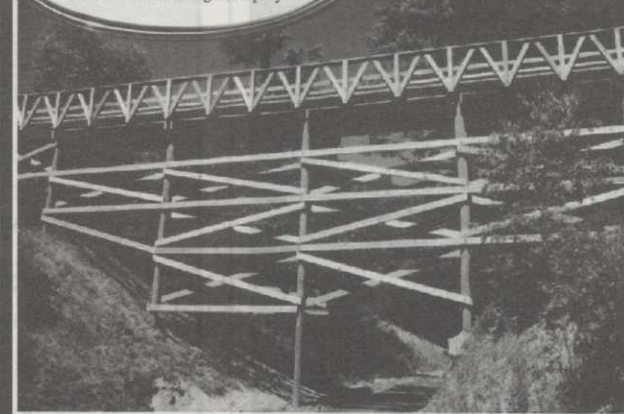
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Europe

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Statistically, each individual golf course in Sweden hosts no less than 1,142 golf club members. The average number for Europe is 540 golfers per course (not taking into account the number of holes of the courses). Norway's courses are also packed with a ratio of 833 golfers per course, whereas tourist destinations like Portugal (117 members per course) or developing countries like Hungary (219 members per course) will be able to offer lots of slots to travelling golfers paying green fees.

This figure of courses either being packed or still looking for players also tells us where there is a significant further demand for new golf courses and where, on the other hand, developers should think twice before starting another new project.

The fact that there is a general slow-down in the opening of new courses shows us that after a period of rapid golf course growth in the beginning of the 90s, often enough described as the 'golf course boom', the establishment of new golf courses has entered a new phase of more carefully considered, and appraisal led, new developments.

Beyond the figures, Europe is now witnessing a trend toward more demand-oriented course development.

It seems that, after a while, European industry players have finally grasped what the NGF meant with its "player/facility development pyramid" issued years ago. It is no longer exclusively the high-end championship and regulation courses that are built. There are more and more executive courses and golf academy facilities being opened up to the new golfers, meet-

ing their demands and availability of cash.

In Germany, for instance (golfers vs course ratio: 555), quite a few new courses are being built on lower budgets.

Beyond the figures, Europe is now witnessing a trend toward more demand-oriented course development.

There are quite a few executive courses now in the areas surrounding bigger cities (Munich, Rhine-Ruhr-Area) which

are financially very successful. Golf academies, for instance in horse race tracks, are very popular in Germany. The "club of non-golf club golfers," a subsidiary of the German Golf Federation, has managed to

attract some 9,000 new golfers over the last few years — 3,500 out of which have converted to club golfers in the meantime, adding to higher frequency of use on the regulation courses.

The future of the golf course industry in Europe has become more solid than was predicted over the last couple of years, times that witnessed bankruptcies and takeovers galore all over Europe.

Consumer orientation, matching courses to the golfers' demand and the understanding of the industry as a hospitality business should yield sustainable success to those who keep the golfing customer satisfied.

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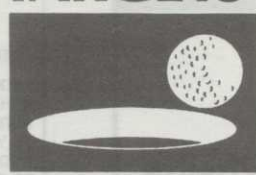
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Chinese market

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All of these courses are in position, but it is clear that it will be some time before returns on their investments are realized.

Heading west, the Spring City Golf and Lake Resort sits in the Southwestern province of Yunnan just outside of the city of Kunming. The project is being developed by a handful of independent investors and by Keppel Land, a leading Singapore Government-linked conglomerate.

Spring City is truly a unique golf club. The Jack Nicklaus mountain course is already completed and the Robert Trent Jones II course is currently under construction. Both courses are links style, fitting into the surrounding mountain terrain beautifully.

At 7,000 feet of elevation, the climate is comfortable year-round and is well suited for the all bent-grass layout. They have just held their "soft opening" in January and will be officially opening the club this spring.

The RTJ II course will have 9 holes seeded by then, and the remaining holes by the lake side will be finished by the end of the year. Eventually the resort will feature holiday villas, two hotels, and a Club Med (another first in China).

While they have not started their membership drive yet, management is confident that the location of the club, the quality of the golf courses, the outstanding climate, and the high-caliber facilities will attract members and resort guests.

In the meantime, they will have to come to grips with the fact that they are attempting to forge a new market in Kunming, a city with very little in the way of tourist amenities.

From west to east, Shanghai provides one of the most diverse populations in China. And one rife with expatriate businessmen.

The Shanghai Links Executive Community seeks to cash in on that fact. It lies just east of Shanghai in the



Pudong New area and is the flagship project for Sealand Housing Corporation, Canada. The project, which has been under construction since 1995, sits on 520 acres of reclaimed land.

The specialized expatriate community will include housing, schooling, recreation, clubhouse, health facilities, and an 18-hole links-style Jack Nicklaus golf course. The developers sense that their project will be in the center of the growth of the Pudong New area.

There are already 2,800 offices in this area and 40 financial institutions have moved or are planning moves into this area in the coming year. "During a direct survey of multinationals leading up to this investment, we discovered a unanimous trend of increased expatriate presence in Pudong and we think this is only the tip of the iceberg," said Marcus Thompson, deputy managing director of HSBC Private Equity Limited, the largest investor in the group.

The investors have made an unprecedented commitment to this project. The process of reclaiming the land took two years and cost US\$21 million, moving 60 billion cubic meters of earth. The construction of the golf course began in June 1997, and the shaping of the back nine was completed in December 1997. The planting of the first nine should be done by March of this year and will be playable by June. The entire course should be completed by the end of this year.

The Shanghai Links project, although it has been long in coming, promises to be a fine golfing facility as long as the Pudong New area lives up to its billing.

It is clear that many investors in China have gone to extremes to position themselves in a market that has not yet fully matured.

Golf development in China is a risk. It is abundantly clear that there is only so much support that the expatriate and Hong Kong carry over market can provide. The local population must be tapped and that will only happen once the per capita income of China reaches the next level.

The continued success of the Chinese economy, therefore, will ultimately determine how soon profits will be made. In the meantime, these courses must hedge their bets, maintain their facilities, and keep in mind that they are industry leaders in one of the largest potential golf markets in the world.