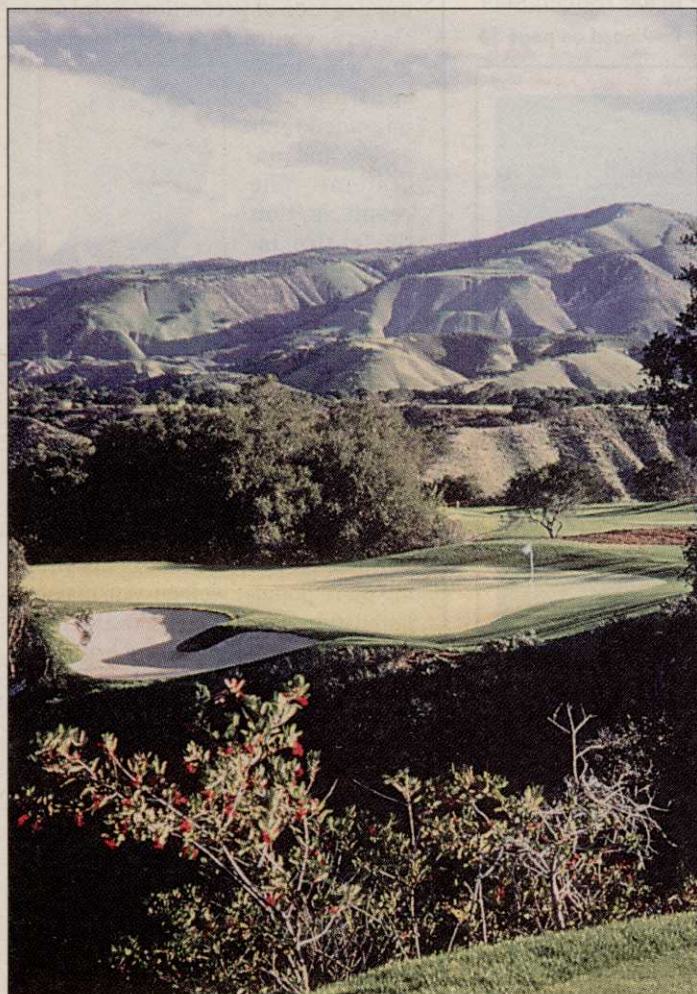




10 years later: Time to put the golf course industry into perspective

Editor's Note: The editors of *Golf Course News* have asked several industry illuminaries from each of the departments we cover on a monthly basis (Maintenance, Design & Development, Management, and Supplier Business) to give us a snapshot of our industry's progress over the past decade. We've also asked them to take a look into the future and consider where, based on what we've learned from the past 10 years, the industry may be headed. As expected, these columns are as varied as the personalities we invited to participate. The columns begin below.



THE PRETTIEST PHOTOGRAPH WE NEVER RAN

We were ready to run this photo of Rancho San Marcos Golf Course in Santa Barbara, Calif., in March, 1998. But due to El Nino part of the course was washed out before the facility opened. Since then, the Robert Trent Jones Jr. design has rebounded and is open for play.

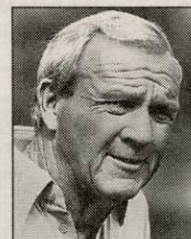
Palmer/Seay consider industry's growth

When asked about the state of the game of golf, Arnold Palmer and Ed Seay of Palmer Course Design Co. (PCDC) had the following conversation:

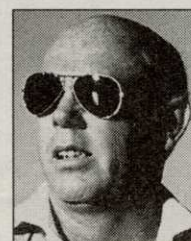
Palmer: I think the overall state of the game is in great shape. The regular Tour, the Senior Tour, the LPGA, and the Nike Tour are all in a very positive mode.

Palmer Course Design is going great. In fact, we have more active projects now than we have ever had. I know Ed [Seay], Harry [Harrison Minchew], Erik [Larsen] and all of our guys are not only excited about our current projects, but are equally

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Arnold Palmer



Ed Seay

Science and business enhance the game of golf

By JAMES R. WATSON, Ph.D.

• Vice President, The Toro Company (Retired)

As I reflect on how things have changed in the 1990s, it's as much advances in science and technology as changes in the business of golf that has brought us to the current high point in golf's history.

For superintendent's, each day begins and ends with the same glancing question — How does the course look? During the



James Watson

'90s new grasses emerged that possess superior stress tolerance: heat (bentgrass); cold (bermudagrass); drought (buffalograss) and salt (Seashore Paspalum). Toro developed the Universal Green Turf Scale that actually dials in the color

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Top 10 changes for the decade

By BRENT WADSWORTH

To commemorate the 10th anniversary of *Golf Course News*, we prepared a list of the Top 10 trends of the last 10 years that are most likely to be perpetuated for the golf course design and development industry in the decade ahead.

• 10. Golf course development is booming in out-of-the-way places. (Who knew golf would be so popular in towns so far away from an easy-to-reach airport?)

• 9. Computers now enhance efficiency in every phase of development from design to irrigation. (Now if we can just program the computers to streamline the permitting process.)

• 8. The style of course most in demand is 6,800 to 7,200 yards long, has 18 holes, and is upscale and semiprivate, with daily fees. (Where have all the par-3s gone?)

• 7. Golf cart paths (and golf cars) are more popular than ever and in almost universal demand. (After all, we all need a place to park our clubs, laptop and cell phone, don't we?)

• 6. Water is scarce in some areas. (And getting scarcer.)

• 5. Litigation and potential insurance liability are omnipresent. (Enough said.)

• 4. Many sows ear sites (gravel pits, stone quarries, garbage dumps, flood-prone zones and even inner-city lots where buildings have been razed) are waiting to be turned into silk purses in the form of beautiful green golf courses. (Magician training would come in handy for some of these sites.)

• 3. Everybody and their brother and sister (and great aunt and cousin) are taking up golf and they need a place to play. (Who knew Aunt Bertha could hit so well with the help of a Big Bertha?)

• 2. Continuing upgrades in design, building techniques and technology have contributed to an overall elevation of the industry. (Quantity is up, too. In the last year approximately 450 courses have been built, from 211 just 10 years ago.)

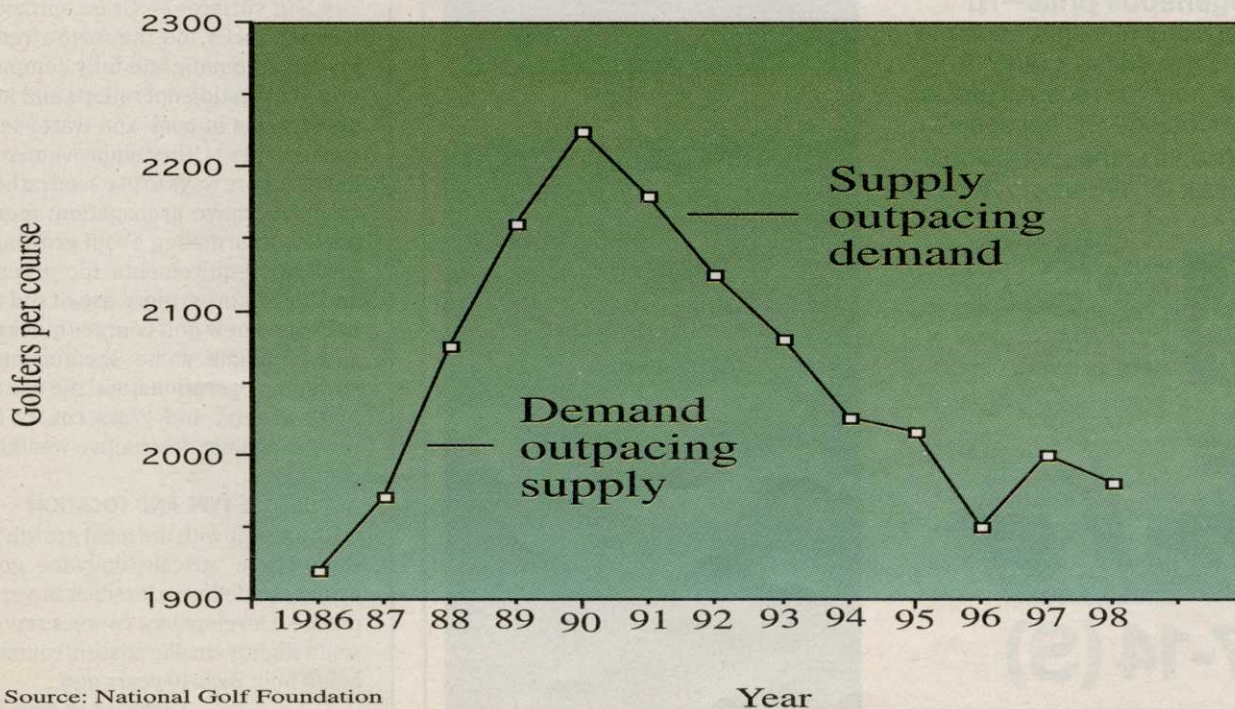
And the No. 1 trend from this decade that is most likely to be perpetuated in the next decade is ...

• 1. The pipeline of projects is full, with no real end in sight. (Thanks to all those people who think it is fun to keep hitting a little white ball with a stick and follow it around a course until it falls into a hole.)



GOLF INDUSTRY STATISTIC

Golfers Per Course • 1986-1998



Source: National Golf Foundation

Wadsworth

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Outside metropolitan areas, golf course demand is being fueled by increased interest in golf, economical land costs and available desirable golf sites. While the market for remodeling older courses remains strong, demand for company or corporate industrial courses is almost nonexistent.

MONEY, COURTS AND GETTING IT DONE

Lower interest rates, a strong money supply and golf's popularity have created potential new owners of all sorts as well as many new designers and developers. Public and private charitable concerns and system owners who have a stake in multiple courses are now in the marketplace.

In the last decade, several environmental and legal trends also

have evolved. The permitting process for construction has become more difficult, with extended time lengths. Golf course owners continue to run into difficulty meeting permit requirements due to more stringent wetland and water-use restrictions.

As for the legal environment, litigation has increased and now covers claims against every aspect of facility development and the game of golf. As a result,

insurance needs must be increased for work areas that did not exist 10 years ago.

Given such progress and these trends, many opportunities exist to continue the run on new facility development, even if the number of golfers nationwide does not increase. The marketplace, while seemingly fully mature, can still absorb more facilities, with no real end in sight for demand.

Watson

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of green most appealing to the television camera's eye.

New practices were adopted in response to environmental concerns including Integrated Pest Management (IPM) and Best Management Practices (BMP). Courses changed their practices to be more environmentally responsible and responsive to their clubs and communities.

If the first question is how does the course look, the second is always — How does it play? As golfer demand for lower heights of cut on greens and fairways grew, it became apparent that new equipment and materials would be needed if course superintendents were to maintain the same high quality playing conditions. Manufacturers and suppliers of seed, sod, pesticides, fertilizer, maintenance equipment and irrigation systems responded.

New innovative equipment like water injection aerators produced ready to play greens seconds after the aerator finished its final pass. Mowers that shift and flex emerged to create optimum turf. High-tech, computerized irrigation controllers were developed to apply water more precisely to reduce costs and better meet the needs of the grasses.

The business of golf changed too. Greater emphasis was placed on research and education throughout the 1990s. New and enhanced foundations emerged to support turfgrass research and such notable efforts as The First Tee(initiative began to make golf more affordable and accessible and encourage new players for the future of the game. The industry has become a close knit group of researchers, associations and industry partners all working together to enhance the game of golf.

A check of my crystal ball and I see a promising future for golf supported by turfgrass science and enhancements in bioengineering. In the future, precision turfgrass management will become the norm with increased use of GPS, GIS, and T-map technology. In the agronomic area, genetically engineered grasses will emerge with increased stress tolerance. Biological control of diseases, insects and weeds will reduce the chemicals used on golf courses. And we can expect molecular research to reveal basic cellular compounds that will provide answers to plant growth and response to environmental agents.

We'll look back in another 10 years upon a decade of phenomenal growth and opportunity for a game that enriches lives through the emphasis of personal integrity and achievement.

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