

by
STEVE
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The mood about the golf industry is cautiously optimistic. Even though there were small declines in some areas and minor gains in others, the golf industry held steady in most areas of the country. Not a boom ... but not a bust.

Rounds increased 0.2 percent in November 2005 year to date, according to the National Golf Foundation. At press time, a year-end rounds report hadn't been completed. For same-store rounds played in 2005 vs. 2004, NGF projected rounds to finish flat to down one-half of 1 percent. (See a related chart on page 36.)

Weather conditions affected rounds in 2005 as hurricanes swept across the Southeast, prolonged drought opened the way for the wildfires in the Southwest plains and late-season rains washed away golf opportunities in the Pacific Northwest.

But the industry's challenges are greater than unpredictable weather. Corporate play has come under greater scrutiny from shareholders responding to economic pressures.

"The economy and reduced travel following 9/11 started an across-the-board decline impacting all types of courses in all regions," says Ricky Heine, CGCS, general manager of Golf Club Star Ranch in Hutto, Texas. "It's going to rebound equally. The golf industry is coming out of a period of flat growth and is about to see growth begin again."

The number of courses within a market is a considerable performance factor for many golf facilities.

"We've been able to hold our own business-wise, but not without a great deal of effort," says Charlie Birney, managing director for Edgewater, Md.-based Atlantic Golf and secretary of the National Golf Course Owners Association.

"When we opened our first upscale, daily-fee public golf course on the Eastern Shore in 1991, there weren't many other courses around. At that time, we didn't need to spend any money to attract players. Now, marketing is a huge part of what we do. Like many other regions, we're challenged by the influx of other courses around us."

Despite new courses in the market, play at



Heine



Birney

Golf Club Star Ranch has increased each year for the past five years, according to Heine, who also is vice president of the Golf Course Superintendents Association of America.

"We're a new course, but there were 10 new courses built in a four-year period in our region," he says. "That's a lot of competition that didn't exist four years ago. To be competitive and successful, we need to be creative and energetic in attracting golfers and encouraging them to play."

In 2005, there were 124.5 openings (18-hole equivalents), according to NGF. This continues a steady annual decline that began in 2001 following a high of 398.5 openings (18-hole equivalents) in 2000. NGF also reported 98 closings (18-hole equivalents) in 2005, which is the highest number in years.

Alan Andreasen, CGCS, at the 18-hole Los Lagos Golf Course and the nine-hole



Andreasen

Rancho del Pueblo Golf Course in the San Jose, Calif., area, says Los Lagos has been open for three years and Rancho for five, so it's hard to talk trends. But he says rounds are increasing modestly – 1 or 2 percent – at both courses.

A nearby course that served mainly older and lower-skill-level golfers closed recently, and Rancho is attracting many of its players.

Growing the game

Aside from course development, the golf industry has identified important challenges it faces: the time it takes to play the game; the demands of family time; the cost of green fees, equipment and lessons; and the difficulty for new players to feel comfortable learning the game. Birney urges people in the industry to think outside the box.

"We hold an informal, early morning nine-hole event," he says. "People come in, have coffee and network, hit the course for a couple hours, raise a little money for charity and head out by 10 a.m. so they can go back to work. It fits the time and skill level of many players. Some will thank you for getting them back into golf."

"Courses can be stodgy and unwelcoming to beginners," he adds. "We need to promote beginner-friendly course programs to encourage more play. It's all about hooking people on golf and retaining them as players."

Though much progress has been made, more work is needed to grow the game be-

yond existing core golfers.

"I'm optimistic, but we have to do an even better job to improve efforts to attract and retain juniors, women and minorities using programs such as First Tee and Grow Golf America," says Greg Muirhead, an architect at Rees Jones and v.p. of the American Society of Golf Course Architects.

People still want to be outdoors, enjoy the camaraderie and exercise of golfing and experience the thrill of hitting a great shot, Muirhead says.

"Making golf part of their lifestyle choice depends on how we target them and fill their needs," he says. "Our designs are becoming more flexible to accommodate the greater diversity of skill levels of the golfers. That can include tees for women, tees for seniors and junior tees for family play."

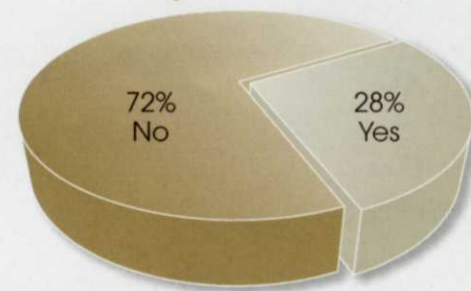
Additionally, advanced technology for balls and clubs increases the challenge to grow the game and improve the health of the industry.

"Courses are becoming longer and wider because the equipment and the ability of the player are getting better," says Tommy Sasser, v.p. of Weitz Golf International and immediate past president of the Golf Course Builders Association of America. "That requires more land and adds expense. Though the cost per acre might not be higher, there are more acres. The extra area drives up construction, development and maintenance costs."

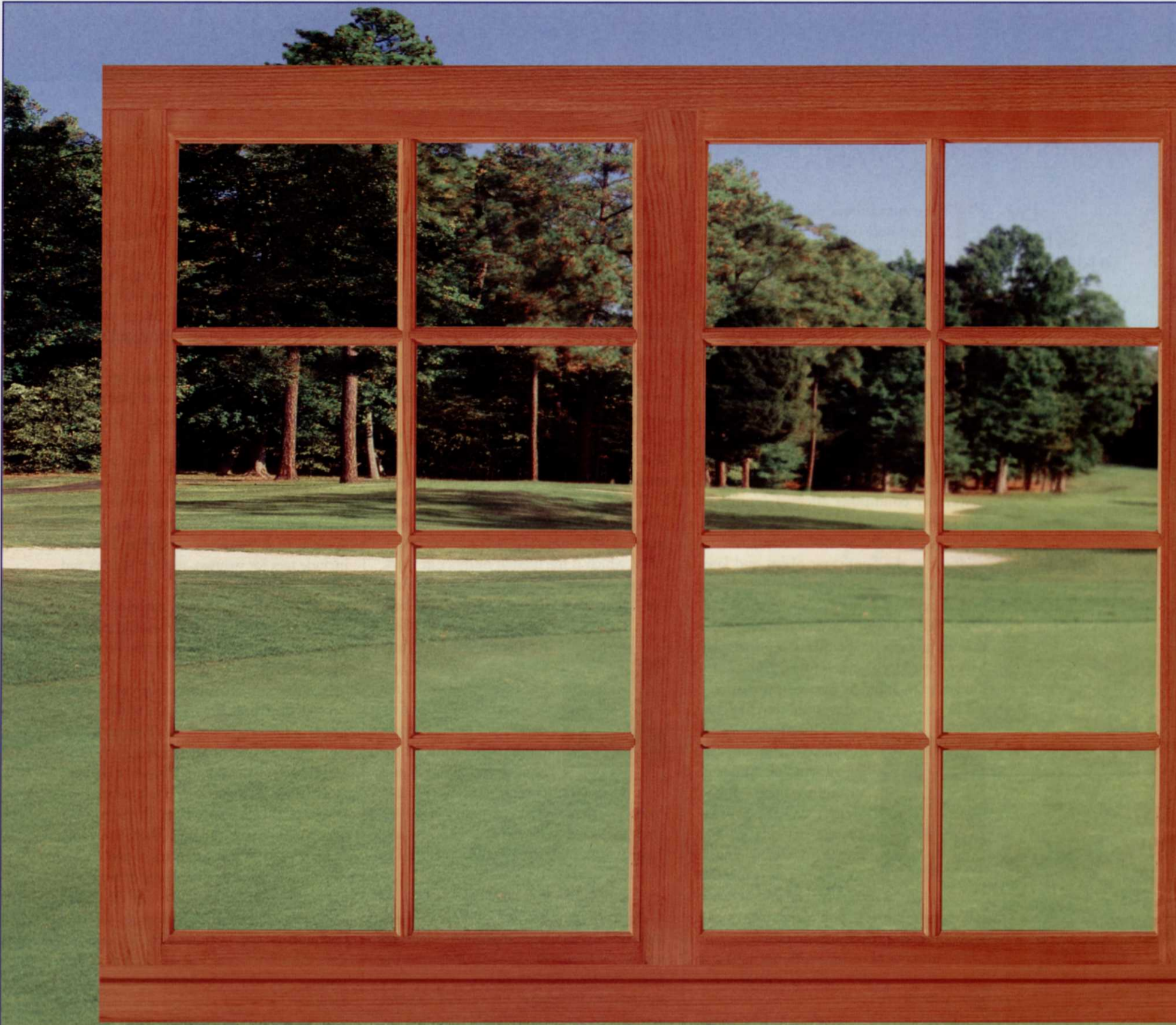
Because those costs ultimately are passed on to the end-user, this impacts another challenge – the cost to play. To counter that, Muirhead says the ASGCA is championing the idea of building more practical facilities.

"Courses don't always have to be 18 or nine holes," he says. "A three-hole, par-3 executive course might be better received if it's in the right spot and is affordable, accessible and sustainable. The PGA tour fan base has grown

Do you plan to renovate your course during the next five years?



Source: 2005 GCN subscriber survey of 504 respondents



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Muirhead

35 percent in the past few years, so we're attracting interest to the game, but we're not getting those people as players."

Maintaining golf courses has challenges of its own, as well. Superintendents are continuing to find ways to do more with less.

"Budgets are holding flat or slightly increasing," Heine says. "Fuel is one of those basic, externally fixed costs, like electricity and water, and the one fluctuating most right now. As these costs rise, they cause superintendents to be creative and save in other parts of the budget as much as we can."

And management is recognizing the important role of course maintenance and conditioning. As additional revenue is generated, some of the funds are being allocated to the superintendent's budget to enhance the course.

A look ahead

The biggest challenge in 2006 throughout the industry will be continuing to increase play and keeping the revenues flowing to meet increased demand, Andreasen says. (See related chart below.)

Also, course and clubhouse renovations will continue. (See chart on page 31.)

"Many of the older clubs, if they have a good facility, are in great locations in relation to population centers," Sasser says. "Reno-



Photo: Atlantic Golf

Atlantic Golf, which owns Queenstown (Md.) Harbor Golf Links, is holding its own businesswise, according to managing director Charlie Birney.

vation or reconstruction will enhance their competitiveness."

Golf courses always must strive to improve. For Heine, bunkers are a continual improvement project. The in-house staff is rebuilding about 10 bunkers a year, rotating on a five-year cycle.

Muirhead says the ASGCA has made a push to educate club managers, owners and public golf owners about master planning

with an architect on retainer to consult with annually.

"Developing a master plan will allow the course to improve in phases throughout the years to better allocate funds and remain competitive," he says.

Yet optimism about the industry's future will continue to be tempered by reality.

"Discussion of a possible break in the home building bubble is a concern to all in the golf construction business because much of it is driven by real-estate development," Sasser says. "That would be a major hit. So we're keeping a

close eye on that real estate with the development of golf courses tied into it."

Golf also is competing with many other activities for entertainment dollars.

"It's not just the course, but the entire experience – the course, club and facility and the environment that we create," Heine says. "There needs to be a positive experience for golfers who want to commit their time and funds to it."

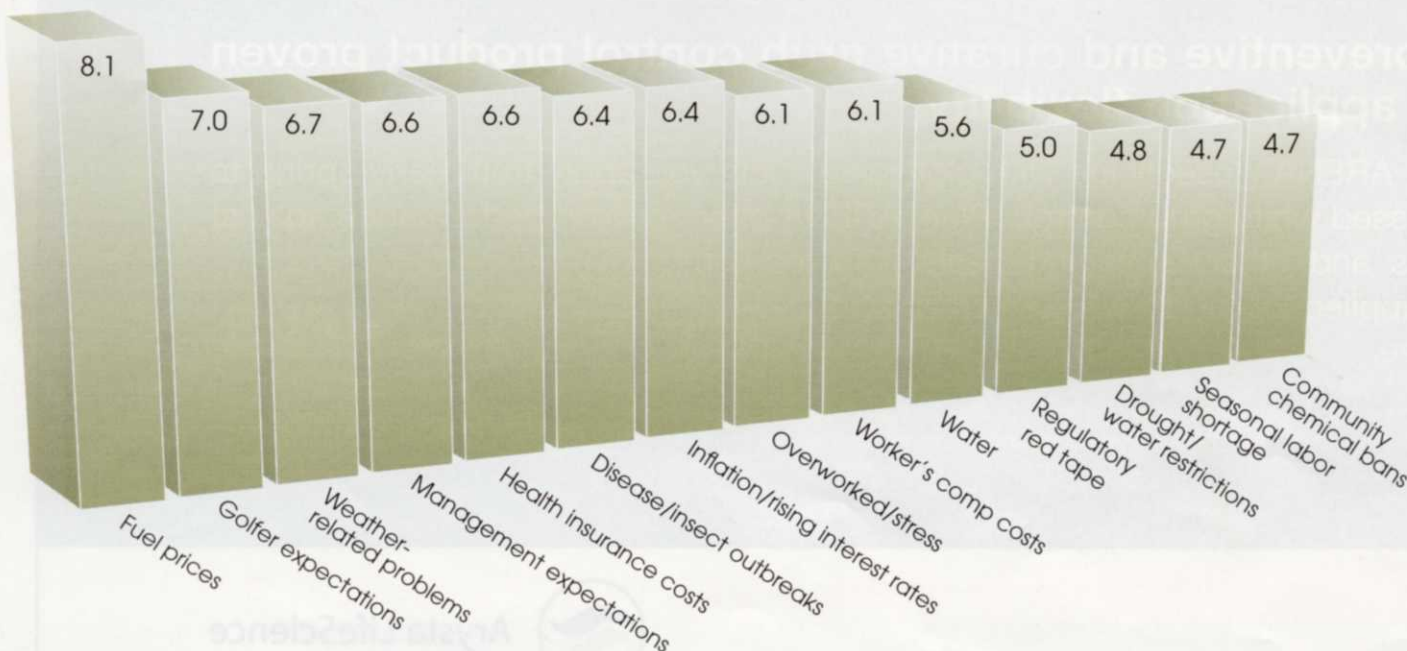
Older golfers have a new lifestyle attitude that's impacting the golf industry. People retiring are looking for a total package that includes greater access to those things they deem important to their quality of life. Climate isn't the only issue, they want to be closer to family and the advantages of a metro area, Birney says.



Sasser

On a scale of 1 to 10 (with 1 being the lowest concern and 10 being the highest concern), please rate how much concern each of the following issues are going to be to your business successes in 2006.

Source: 2005 GCN subscriber survey of 504 respondents



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Approximately, how many rounds were played at your golf course(s) in 2004 and how many were projected for 2005?

Source: 2005 GCN subscriber survey of 504 respondents



The future of the game and its progression partly lie with junior golfers.

"I see the industry continuing to move forward with programs like Play Golf America and First Tee, introducing those at younger ages into the game," Muirhead says.

Heine agrees, saying these efforts have an impact on young golfers.

"Like many other courses across the country, our course provides play and teaching opportunities for the golf team of our local high school," he says. "It just happens to be the same high school I attended. Though the student body hasn't increased in size, the current 20 team members are nearly triple the number on our team 25 years ago. That's

a positive reflection on the youth growth in golf."

There also is a stronger commitment from various organizations working together on common causes to benefit the industry. Communications and relationships might be strong, but the industry needs to continue to work on those relationships to be successful.

"In the past, we fought the same battle, but did it alone," Sasser says. "Now we're jointly fighting it together." GCN

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Unlike 10 years ago, marketing plays a significant role in improving business at Atlantic Golf's properties, one of which is Potomac Ridge Golf Links in Waldorf, Md.

Photo: Atlantic Golf



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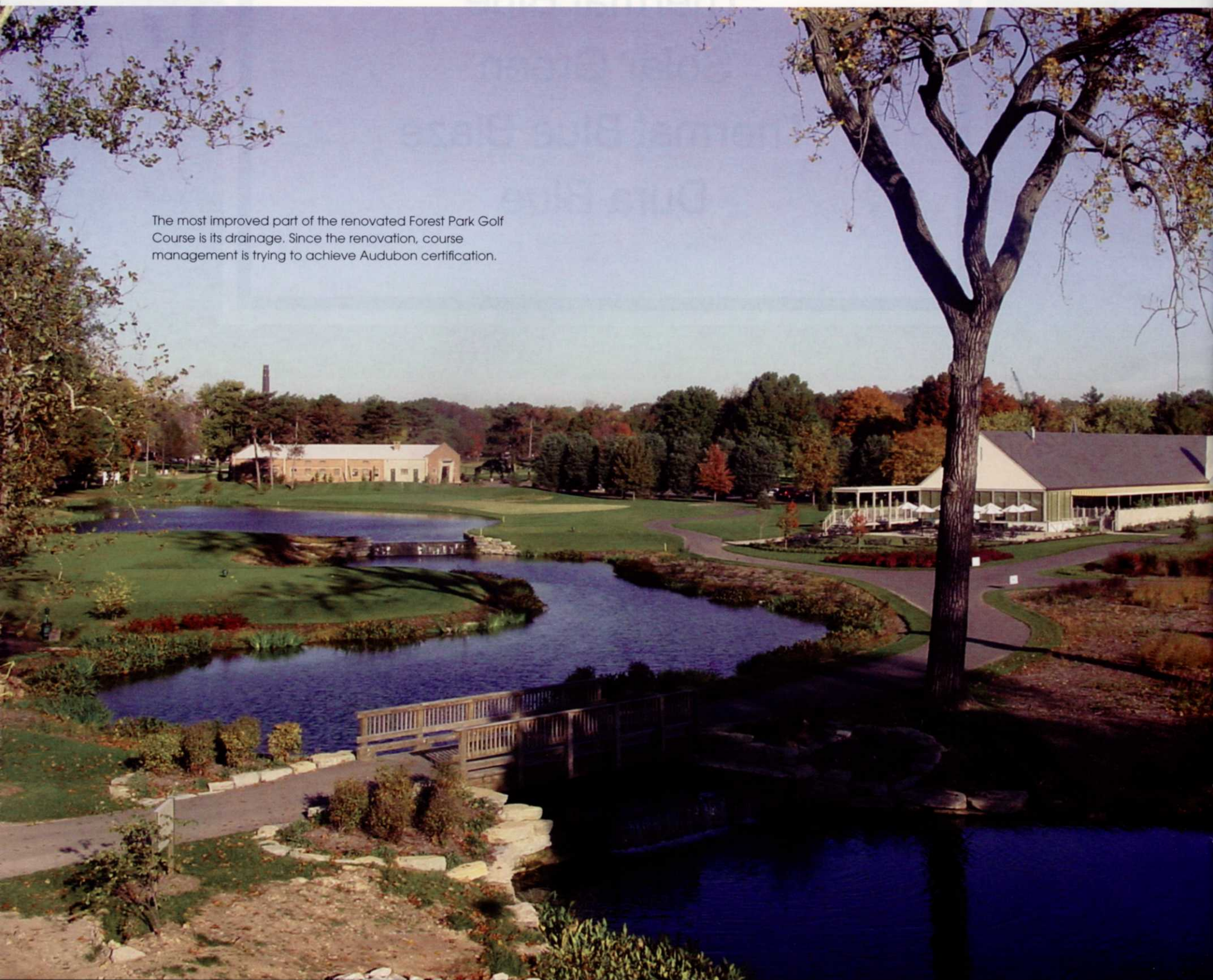


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The most improved part of the renovated Forest Park Golf Course is its drainage. Since the renovation, course management is trying to achieve Audubon certification.





by
**JOHN
WALSH**

*Photographs by
Rob Geary*

Golfing on the site of the 1904 World's Fair is more enjoyable now that the 27-hole Forest Park Golf Course in St. Louis has been renovated. Even though the course has been updated, golf course architect Stan Gentry kept a similar design the course had when it opened in 1912. However, getting to that point wasn't easy, mainly because the course is part of a 1,370-acre urban park that features a zoo, memorial, outdoor opera, science center, planetarium, and art and history museums.

Get the ball rolling

During the early 1990s, the city brought together individuals and consultants to analyze the park because it was falling apart. The water quality in the lakes was bad, the roads were in disrepair, storm sewers were overflowing, the vegetation was old, trees were dying and the sidewalks were cracking, according to Gentry.

"We looked at the whole infrastructure – what needed to go and what needed to stay," he says. "It took about two years to provide a report."

The public also was invited to comment, according to general manager Jeff Raffelson, who says the first consideration was to avoid use conflict in the park. The committee analyzed the roads in the park to improve traffic for cars, joggers, bikers, etc.

The golf course, like the park, was run down. It had poor drainage, undersized tees, worn cart paths and heavy play.

"The course had deferred maintenance and hadn't been changed much since it was first built back in the early 1900s," Raffelson says. "There was a piecemeal approach to upgrading the course because of the number of rounds played."

In the early 1990s, the course generated 100,000 rounds annually. Shortly before the renovation, the course generated about

90,000 rounds annually.

But despite the piecemeal approach, the greens were in good shape, the Bermudagrass fairways weren't too bad, and the course is on a great piece of land, partly because of the elevation changes, according to Chad Carpenter, golf course superintendent at Forest Park.

Raffelson says the renovation project was challenging because there were a number of stakeholders involved. The course has three owners – the city; Forest Park Forever, a private nonprofit group that raised money for the renovation; and American Golf, the company that manages the facility.

"It's pretty unique to see public and private entities come together," Raffelson says.

"We needed to balance the issues among these three, but everyone was on the same page," Gentry adds.

Also in the mix were The Danforth Foundation, which donated a significant amount of money through Forest Park Forever, and the Probststein family. Norm Probststein was a St. Louis businessman and avid golfer who was the catalyst for the renovation and got things moving by donating \$2 million, according to Raffelson.

"It was his vision and donation that started the whole thing," he says.

Forest Park Forever raised millions of dollars for the park improvements and now is getting donations to help maintain the course, according to Gentry.

The budget for the course renovation was \$4.5 million, but the total cost ended up being \$12.5 million, which includes the course, parking, clubhouse and infrastructure.

Back in time design

The old 27-hole layout consisted of an 18-hole course that extended into the park and didn't have returning nines. Many of the holes ran along streets, creating conflicts with

AT A GLANCE

Forest Park Golf Course

Location:	St. Louis
Year built:	1912
Number of holes:	27
Type of facility:	Municipal
Renovation started:	September 2001
Renovation completed:	September 2003
Total cost:	\$12.5 million (\$6.5 million for course, \$4.5 million for clubhouse and \$1.5 million for new infrastructure)
Golf course architect:	Stan Gentry
Golf course superintendent:	Chad Carpenter
General manager:	Jeff Raffelson
Management Co.:	American Golf
Construction Co.:	Sellenriek Grading Co.
Greens:	L-93 bentgrass
Tees:	Quickstand Bermudagrass
Fairways:	Meyers zoysiagrass

joggers, bikers, in-line skaters, etc. The old nine-hole layout was a flat course plagued by poor drainage.

Some of Gentry's guidelines were to provide initial pools and waterfalls for the park's new connected waterway while solving the drainage problem, as well as provide three nines that could be paired in different combinations.

Added to that, American Golf was worried the course would be too difficult for the average golfer after the renovation. So, Gentry says he didn't have a lot of room to work.

"We tried to create land forms that would help drainage and tie it to the new layout," he says. "We tried not to destroy the beautiful trees. We didn't want to move a large amount of land to create forced land forms."

A tree survey was conducted, and that was overlaid on the existing topography.

"I looked at the center line and decided on the trees we wanted to save and which ones could go," Gentry says. "We started grading that way. I found out where I could cut and fill. With one grouping of trees, we didn't change the grade. We had to figure out where the water wanted to go and tie the new

lagoon system to it to minimize the amount of drain pipe we needed to use."

Because the course was old, Gentry wanted to use characteristics of teens architecture that hadn't been used in a while. For example, part of a green and collar slope off into a bunker.

"We were told that's a no-no, but it was a characteristic back then," Gentry says.

Gentry also designed a punch bowl green; a Biarritz green with big swales; an 8,500-square-foot green, which is the biggest on the course; and a rectangle green with cut-off edges. Some greens are flat with the fairways so balls can roll up on them. The bunkers are flat, but some have steep faces with zoysiagrass.

Gentry opened the views of the course by removing growth but still kept the course intimate and easy to walk.

Raffelson says the new design mirrors some of the signature holes from the old course, such as one that went in front of the art museum.

In the end, Gentry created three nine-hole courses: the 3,000-yard Hawthorne, the 3,200-yard Dogwood and the 3,200-yard



Golf course architect Stan Gentry created land forms that helped drainage.