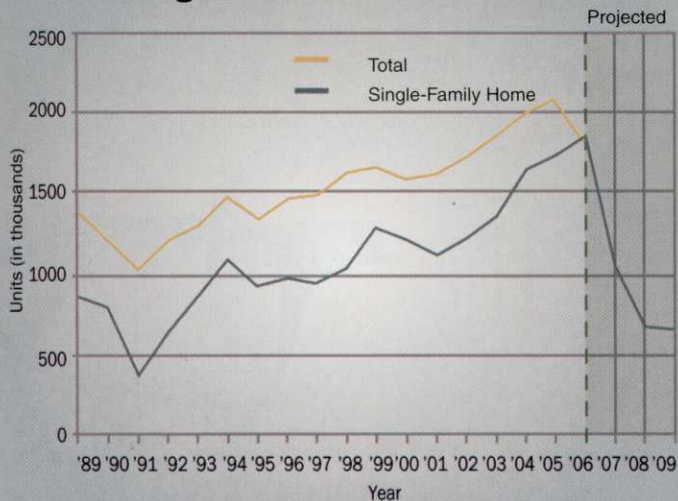


## U.S. housing starts



Source: U.S. Bureau of the Census, NAHS

country, typically turns a golf course it develops over to members or a third party. And the reasons to build them vary.

“It’s based on amenities or the number of homes in a community,” Richey says. “Permitting requires them to be built. Sometimes a golf course is added to a development to get rid of wastewater.”

Toll Brothers was working on a project in Naples, Fla., that was delayed further because the developer is reluctant to start right now.

“Even though things have slowed down, we’re still looking for country club neighborhoods three to five years out,” Richey says. “Land prices are declining, making large land tracts attractive. We’re in the permitting and planning process.”

### HIT HARD

Superintendents will feel the ripple effect of the housing downturn because there are fewer new golf courses, which in turn, means fewer jobs, more severe competition for employment and less mobility for a superintendent looking to leave a job, DeLozier says.

Trevor Brinkmeyer is one superintendent who has felt the effects of the slumping housing market. Brinkmeyer, who’s an interim assistant superintendent at Quail West Golf & Country Club in Naples, Fla., and is looking for a full-time superintendent job, used to work at the private 54-hole Shadow Wood Country Club in Bonita Springs, Fla. He was a superintendent there for five years and started out managing one 18-hole golf course. When one of the other two superintendents left, he oversaw two golf courses while the other superintendent oversaw the third 18-hole course.

Bonita Bay Group, a developer, owns and operates Shadow Wood. It’s primary objective is to sell property and use golf courses as an attraction, says Brinkmeyer, who estimates Bonita Bay Group’s portfolio includes 11 golf courses in five communities.

Shadow Wood, which has 1,050 members and generates about 40,000 rounds annually per course, sold out in 2006 but originally wasn’t supposed to sell out until 2012, Brinkmeyer says. Bonita Bay Group wanted to turn

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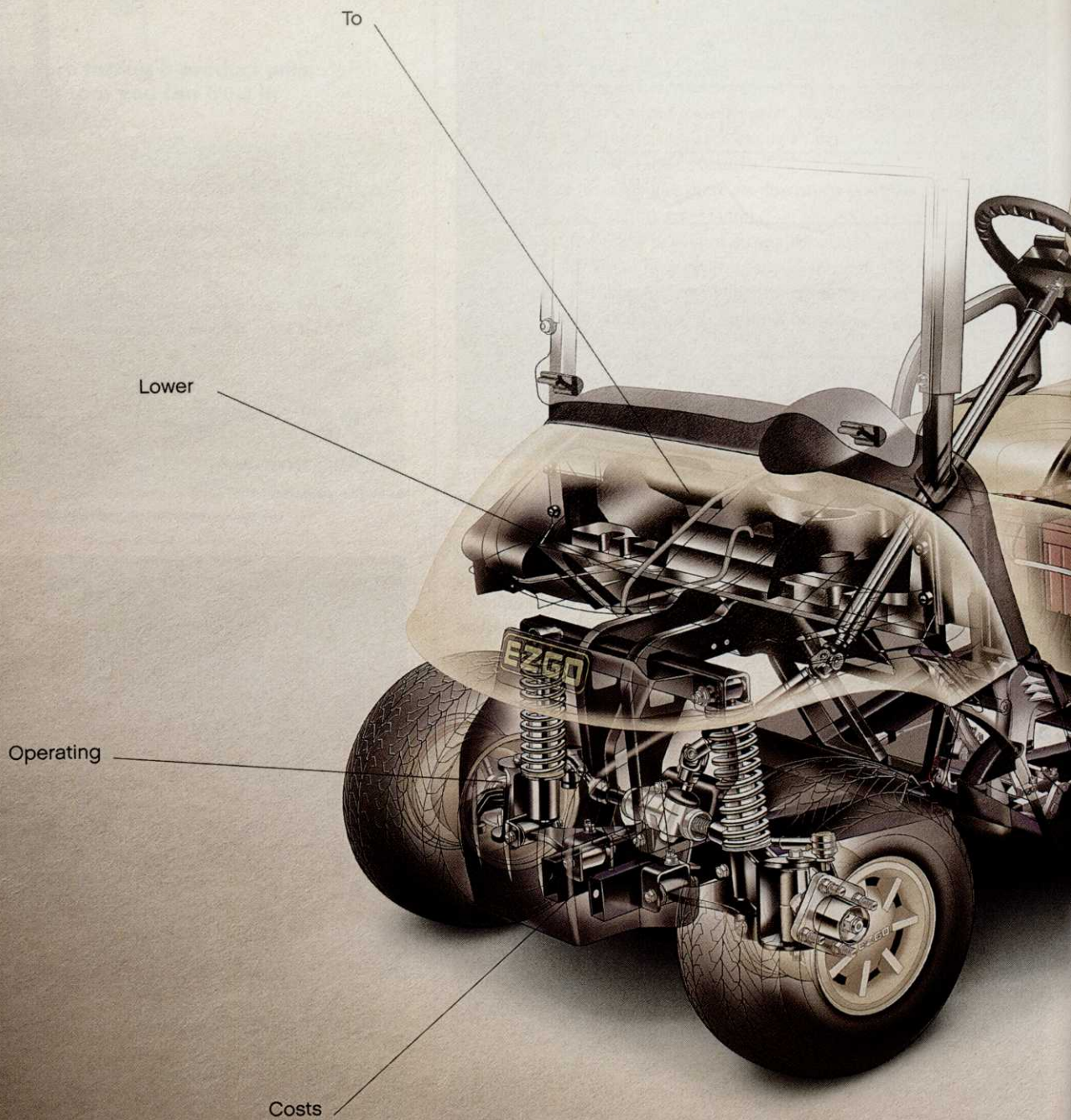
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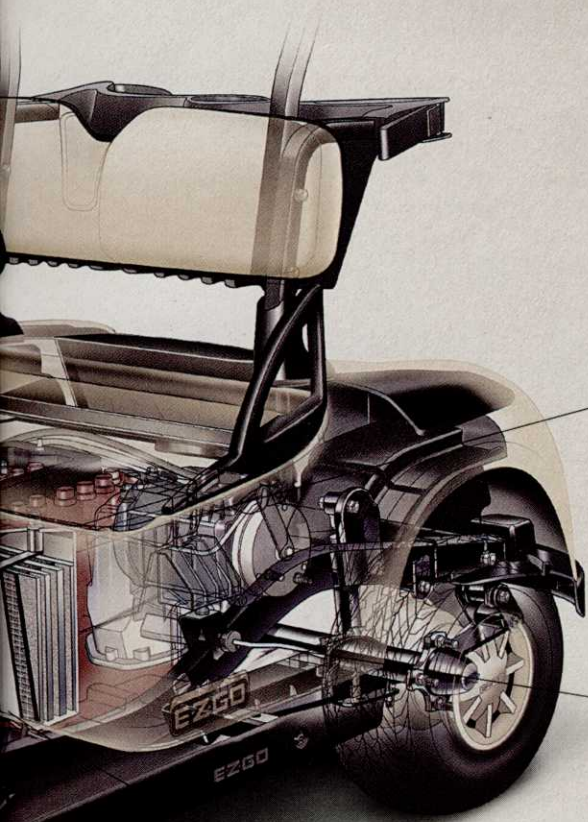
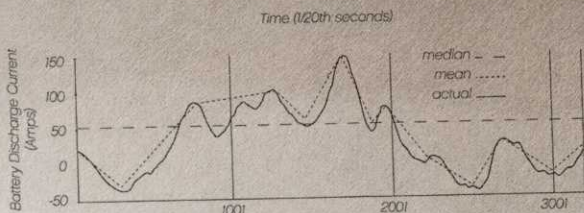
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club ownership over to the members in 2007, but the members and Bonita Bay couldn't agree, so Bonita Bay held on to it, Brinkmeyer says. Things were humming along nicely for a few years, but ultimately Bonita Bay laid off 30 employees in March of 2007, Brinkmeyer says.

"I didn't think much of it at the time because we were productive and watched our spending," he says. "But Kenyon Kyle, the former director of golf who I was reporting to, was more worried because he was in a management position and knew more of what was going on. There were no more talks of layoffs for a while, then three people were cut. Through the summer, it was like any other, but in August, I found out I was one of the cuts. It was immediate.

"Bonita Bay wasn't selling as many homes and had to make cuts," he adds. "The real estate market boomed, then crashed. Bonita Bay was sitting on land and had to pay the bank, so it cut labor, which is its biggest expense."

Brinkmeyer is job hunting in Georgia, Florida, Texas and the Carolinas.

"I have an opportunity in Mexico, but it hasn't developed as quickly as I thought," he says. "It's a different situation when you have financial obligations."

#### INTERNATIONAL FLAVOR

But the housing market's condition doesn't mean doom and gloom for all. There are positives of the downturn, Forrest says.

"We stepped up the effort to work internationally, including China and the Middle East," he says. "Once you're there, you get some momentum. It's a snowball effect. The nice thing is you have access to the best golf course sites that you didn't have the opportunity to access in the U.S., such as coastal sites in Turkey on the Black Sea."

Hills/Forrest's international work started during the downturn in 2001, and the recent housing downturn has reinforced the firm's decision to acquire more work overseas, Forrest says.

"It takes a while to get established overseas – it takes more leg work," he says. "But the scarcity of qualified golf course builders overseas makes the U.S. expertise very marketable. Golf and houses is a new concept internationally, where traditionally golf courses are stand-alone. We keep scratching and clawing out there and have been able to maintain our staff of 11. You can survive."

#### DOWN THE ROAD

Eventually, the housing market will improve. For example, many homes are being sold in high-tech areas and to people coming into the country, Richey says. Demand for country club communities will continue but not like 10 years ago.

"From our experience, people aren't buying into country club communities for the golf alone," he says. "We're seeing decisions to live in country club communities driven by the value of the home, security, fitness, swimming and athletics. Food and beverage isn't as big a driving factor. Golf is a million-dollar view, and only 50 percent of those living on a golf course

actively golf."

Yet, the industry needs to build shorter golf courses, Richey says.

"We're aiming for double-digit handicappers," he says. "We want them to have a good time and a quick round. We see a decrease in the number of rounds per member but that doesn't mean the desire to play golf is declining. Time is an issue."

Forrest doesn't think the premium on lots next to golf courses will ever decline because they provide recreation and beauty for the homeowner and profit for the developer.

"Golf and houses are forever married," he says. GCI

## Potential growth

**A**s the golf industry endures the new construction downturn, it looks to the future and what's to come. Specifically, builders and architects are planning their next projects.

Some markets that were the hottest, such as Florida, California, Arizona and Las Vegas, cooled down, and some markets that were never hot, such as Minneapolis, Indianapolis and Boston, continue to perform in a steady manner, says Henry Delozier, v.p. of golf for Pulte Homes.

"There's a little bit of growth in the resort market, and there's a steady flow of activity on tribal lands that support gaming," he says. "The Pacific Rim and Europe also are steady with golf course development."

Pulte Homes has golf courses in development in Florida, Atlanta and Texas.

"There's a great deal of activity where we're following through," Delozier says. "Those markets are continuing to sell well to people 50 and older."

Florida is a competitive market that's still experiencing a tough time, says Steve Forrest, principal of Arthur Hills/Steve Forrest & Associates and president of the ASGCA. Texas isn't totally dead, and Arizona and Florida are the stronger markets feeling it more than some of the others, he says. The firm has projects in the works in North Carolina, Tennessee, Alabama and Georgia.

Toll Brothers has an interest in building homes and golf courses in Arizona, Florida, California and Las Vegas, which are the worst hit markets as far as overbuilding, but isn't looking at the Northwest states, says Dave Richey, senior v.p. of the country club division of Toll Brothers.

"Our growth is somewhat driven by retirement communities," he says. "We're trying to sell existing home inventory right now. We're not looking for golf course land or communities right now."

Even though Weitz Golf International's recent focus has been clubhouse construction, it has several new golf course construction projects in the works: Dove Mountain in Tucson, Ariz.; Red Ledges in Hebert City, Utah; The Presidential in Virginia and Roco Ki in the Dominican Republic.

"We're stable in construction because of the amount of renovation occurring," says Oscar Rodriguez, v.p., construction manager. "We were averaging six new golf courses a year. Now we have three."

Weitz is also working on the Rope Rider Golf Course in Roslyn, Wash. It couldn't complete the course this year partly because there are two existing golf courses at the facility.

"The bottom line is Suncadia has plenty of land to sell, and the Rope Rider Golf Course doesn't have to be completed from a sales point of view," Rodriguez says. "We have completed 11 holes to date.

Weitz also is working in the Caribbean, where there's a lot of activity.

"We're going to have to pursue projects outside the country more aggressively," Rodriguez says. "There is so much housing inventory in the U.S. that there will be a lapse even when the economy comes back. The economy will turn around, but golf course construction won't pick up as quickly."

Another area for potential growth is resort development in Mexico.

"We're always following the architects, and since they are diversifying in Mexico, we should see the same for builders," Rodriguez says.



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# Back out again

The resale mower market presents several options to superintendents



The availability of off-lease mowers entering the resale market corresponds to the number of golf courses opting for leasing instead of outright purchasing. Photo: Jacobsen

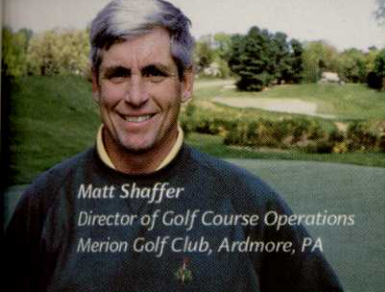
Used mowers have been available since the beginning of mower sales. Traditionally, two types of used mowers hit the marketplace: demonstrator equipment that has relatively low usage and the trade-in equipment from direct purchases that has higher usage. These items were marketed primarily through the manufacturer-connected wholesale dealers and distributors. Leasing programs changed that, introducing a new category of highly maintained, lower-usage, post-lease mowers to

the golf course maintenance market.

#### THE OFF-LEASE CATEGORY

Overall, the availability of off-lease mowers entering the resale market corresponds to the number of golf courses opting for leasing instead of outright purchasing. When a leasing period ends, all the equipment, including mowers, reenters the marketplace. With some lease programs, the user automatically returns the equipment to the lease holder. Others include





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The mower resale market seeks ways to enhance the perceived value of the premium used product in the mind of the consumer.  
Photo: John Deere

preset or negotiable buyout options the user can consider at the end of the leasing period.

There are multiple types of companies issuing leases, too. The lease holder might be an entity linked with the equipment manufacturer or working in conjunction with the equipment manufacturer, independent leasing company or bank.

With so many options, it's difficult to determine the actual ratio of lease agreements compared to outright purchases. The National Golf Foundation provides some data based on its research. Some industry suppliers give off-the-record estimates of a 50-50 ratio based on

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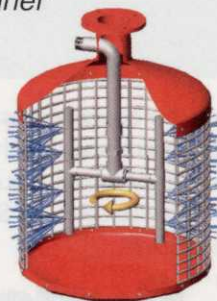
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The equipment coming off leases will return to the ownership of the leasing company and into its marketplace. For companies with manufacturer connections, the resale units will be handled by the wholesale distributor or dealer. The mower manufacturers have built strong distribution networks and count on these companies to support their products completely and provide superior customer service.

Nonconnected leasing entities will use other marketing sources that could be local, regional or international. These "out of channel" marketers make a huge impact on the availability and price point of used mowers.

#### USED MOWER OPTIONS

All types of mowers used on a golf course are included in most lease packages, so everything from rotary gang mowers to walk-behind greensmowers hit the resale market. Lease periods vary from three to four or five years.

"The number of annual use hours is driven by the type of mower, the physical layout of the course and the geographic region, with higher hours racked up on mowers working year-round in warm weather areas than those used in colder climates," says Mike Nesdahl, Toro's senior manager for financing and remarketing. "So the hour ratings at the end of the leasing period typically range from 600 to 2,000 hours."

As with any leasing agreement, the user is responsible for maintaining the machines to a certain standard, which is high with golf course equipment leases.

"Used mower prices generally range from 40 percent to 60 percent of what a new piece would cost," says Ed Kruse, national accounts sales manager for John Deere. "The assured certified units that have undergone the formal inspection and upgrade are more expensive than a trade-in piece that has been inspected and prepared for use but doesn't carry a warranty."

Brian Melka, director of product management for Jacobsen, says some industry data puts the resale price from a 30-percent to 50-percent reduction from the initial purchase price.


"The important thing is how much it's going to cost the course to maintain it and use it?" Melka says. "They'll expect to put more maintenance into it, and while that's not going to eat up all that price difference, it could be a big chunk of it, depending on how the machine will be used and how long it will be used."

The costs decline according to the value of the mowers. The decline typically is in relation to the hours of use rather than the age of the mower. The decline starts to level out over time with the older trade-in mowers, and by eight to 10 years of use, there's not much value left. These older trade-in mowers might be sold at wholesale to a remarketer as is or used as a source for parts.

#### WHO BUYS USED MOWERS?

When Kruse looked at a five-year-old customer profile of those buying off-lease used mowers, it was the smaller-budget golf courses that were looking for the value and weren't as concerned about the hours.

"With increased technology and mower advancements, everyone from the top A course to the more price-conscious privately owned public course is a potential used buyer," Kruse says. "It's all about right-sizing your fleet for your facility and best use of available resources. Courses will supplement a new lease program with a few used units to compliment an



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## EQUIPMENT MANAGEMENT

Used mower prices generally range from 40 percent to 60 percent of what a new mower would cost. Photo: Toro

overall program.”

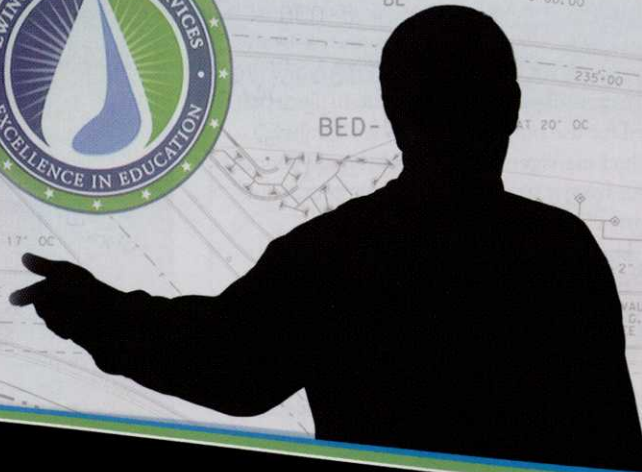
In the upper Midwest, there are many nine-hole golf courses that don't have the budget to buy new machines, says Rich Vining, sales manager for Turf Werks, a Jacobsen dealer located in Johnston, Iowa.

“With the off-lease mowers that roll over from the typical three-year lease program, they can buy a relatively low-hour machine in the 400- to 700-hour range at a reasonable price,” Vining says.

The quality of cut is a golf course's primary consideration for its main cutting units, Melka says. Often, the used mowers are used as a back up or for specialized use rather than as the pri-



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