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CONSUMER RESEARCH

A glimpse of how golfers' behavior affects the business of golf facility maintenance and management.

LOYALTY IS THE ANSWER, NOT DISCOUNTING

The Strativity Group's 2009 Customer Experience Consumer Study is revealing for the golf industry, says Ben Fowler, PGA, golf facility research and consulting sales manager for the National Golf Foundation. This study shows that the No. 1 way to grow a business is by increasing customer loyalty.

"By growing your customer loyalty, your golf business will benefit through decreased customer churn, the ability to charge higher prices than your competitors and increased wallet share," Fowler says. "Clearly, the empirical evidence demonstrating the link between customer loyalty and profits is a compelling case."

The study reveals:

- **52 percent** of dissatisfied customers, or detractors, expect discounts of 5 percent or more to continue doing business with a company; no loyal customers expect discounts. Consumers are very clear about what they are seeking from the experiences companies deliver: quick and effective issue resolution, common sense and discretion, employees who exceed expectations, and ease/ simplicity.
- More than **70 percent** of consumers surveyed indicate that they are willing to spend 10 percent or more with businesses if those businesses exceed their expectations.
- Loyal customers, or promoters, are almost **three times as likely** to expect to continue doing business with companies for another 10 years or more than dissatisfied customers.
- Dissatisfied customers are **10 times more likely** to expect to withdraw in the next twelve months than their loyal counterparts.
- **40 percent** of loyal customers said that they are willing to pay 10 percent or more to continue purchasing from companies delivering great experiences, in contrast with **9 percent** of dissatisfied customers. GCI

Source: Strativity. This information originally appeared in a post on Fowler's blog, "Driving Growth Through Customer Loyalty" at voiceofcustomerguru.wordpress.com.



DETRACTORS ARE 10 TIMES MORE LIKELY TO CEASE DOING BUSINESS WITH COMPANIES WITHIN THE NEXT YEAR THAN PROMOTERS ARE.



52% of detractors say that they will continue doing business with a company only if they offer a discount of 5 percent or more. Conversely, promoters not only don't require a discount, they responded that they will pay more. **IN FACT, 40%** of promoters said they would pay 10 percent or more to continue doing business with the companies that they are loyal to.



MORE THAN 70% of customers responded that if the business exceeds their expectations they are willing to spend 10 percent or more with them. Source: Strativity



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Monroe Miller is a retired golf course superintendent. He spent 36 years as superintendent at Blackhawk Country Club in Madison, Wis. Miller can be reached at groots@charter.net.

THE NATIONAL

My heart is heavy these last days of 2009, unusual for a guy who loves this time of the year. It was always too early to worry about winter injury or snow mold infection, and the upcoming golf season is months away, giving me days of relative normalcy.

It is also the season when we would make plans to travel to the National, or the Golf Industry Show in today's parlance. Usually several of us traveled together to the show city and we had a lot of fun choosing hotels, travel modes, rental cars and routes, pre-conference seminars, seminars and daily schedules during the week.

I have always referred to it as the National. Many my age are guilty of the misnomer as I am. It took a long time to call it the GCSAA Conference and Show, so you can imagine how often I speak about the GIS.

Starting with Boston in 1973 through New Orleans in 2008, I didn't miss a single National. The event was an annual highlight of my career for all those years. I always viewed it as a great privilege my club provided me with, and I took it seriously. Members would ask if I was going to any golf meetings over the winter, and I would launch into an extensive narrative about the National. Too often they would think I was headed on a boondoggle, undoubtedly because that is exactly what winter meetings in a warm climate meant to them. But it was most assuredly not that to me.

The fact is the National is all about education. There is nothing like it in the world of golf when it comes to keeping current on the science that is so essential to a successful golf course operation. The same is true for new products and new machinery. We are given the chance to attend seminars taught by the best turf faculty in the

country. We can listen to America's great golf course architects speak about course design and our best builders talk about the latest in construction techniques. And it was the one time of the year to see all of the Green Section staff together at once, and to attend their national conference as a part of ours.

I have always been inspired by the show, acres of turf equipment and those responsible for bringing them to us. If you didn't get answers from the show floor, you probably couldn't get those answers anywhere.

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answers anywhere.**

For many who attend, the National is like an alumni reunion. Students graduate from a turf program, scatter across the country and don't have many opportunities to see one another. Except at the National. Those collegiate friendships are renewed and strengthened at least once a year.

A lot of relationships made in the business over the decades and treasured greatly are renewed each year at the National, too. I could hardly wait to see Don Hearn and Mel Lucas, Joel Jackson and Mike Vogt and Peter Salinetti and dozens of others; I loved getting caught up on their lives and families and careers. Time spent with them at the National was precious time with true friends, time not available any other way or any more often than at the National.

The National gave me the chance to

see nearly all of America's great cities, and I enjoyed that so much. Some are surprised when I say my favorite conference cities were Boston, Washington, D.C. and San Francisco. San Diego was pretty good, too.

Where else but at the National would a person like me get the chance to meet and visit with America's greatest golfers, some of America's leaders, and a few of our bravest heroes? The Old Tom Morris Awards and the keynote speakers did that for me and thousands like me. It was wonderful!

Even though I am retired, I could still attend. But there is one small detail – nowadays I travel on my own dime. Some colleagues did that over the years of their career, and do I ever respect them for that now that I find myself in those circumstances. I appreciate my employer's generosity even more. It simply doesn't make sense for me to travel to the West Coast this year for the National, other than for sentimental reasons. Retirement has a set of sensibilities.

I'm still going to think about the people I so enjoyed. I'll wonder who is signing books at the bookstore, and think about what is new with the GCSAA staff who I have known for so long. I will wish Cheryl and I were headed to the "Dell" for lunch and then a drive over the mountains for a day or two in Palm Springs. I won't be able to hear Judy Rankin speak, and I will miss the chance to kick some tires on the show floor. The Wisconsin Hospitality Room will go on, and it will be a great evening.

Already I am thinking beyond this upcoming February and planning for February 2011. The National will return to Orlando, and for me that is a short drive.

I promise myself I will be there for that one. **GCI**

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The impact of 2009 cuts and the ramifications for 2010.



EXAMINING BUDGET

BY MICHAEL ZAWACKI

For Roy MacDonald, nothing was spared. MacDonald, the superintendent at Hobe Sound Golf Club in Hobe Sound, Fla., was forced to cut \$70,000 from last year's maintenance budget and he is looking at another \$20,000 slice heading into 2010. Survival during these tough economic times means taking a hard look at each line item on his \$900,000 maintenance budget.

"Chemicals, fertilizers and salaries – those are your big number budget items, so I looked there first," MacDonald

says. "Then I took a real close look at our actual expenses to see what I could carve out. Everything got whacked."

MacDonald's experience is not unique among U.S. golf course superintendents. Over the last year practically no one was left unphased by the economy. In fact, 63 percent of superintendents say their maintenance budgets were cut in 2009, according to Golf Course Industry research. In many cases, this forced superintendents to re-evaluate their maintenance priorities and become more familiar with

the mantra of "doing more with less."

And like MacDonald, superintendents took their red pens to their big budget items. Nearly 85 percent cut their labor force and three quarters reduced their fertilizer expenditures in 2009. These larger budget expenditures were followed by cuts in golf course accessories (69 percent) and mowers (64 percent). Insecticides were the least-slashed budget item, with only a quarter of superintendents reducing their spending from that product category.

However, for most super-

intendents these budget cuts came as no real surprise. More than half (55 percent) said 2009's cuts were about what they anticipated, according to Golf Course Industry research. A fortunate third (32 percent) of superintendents indicated the year was actually better than they had anticipated.

Many superintendents cite an unexpected increase in rounds played at their course. For the most part, this was a result of favorable, mild weather conditions that allowed them to save on fertilizer, chemical applications and irrigation costs.

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-Site of 2011 PGA Championship

The Golf Club at Ballantyne - Charlotte, NC
-No-Till conversion from Bentgrass to CHAMPION

Bay Hill Golf Club - Orlando, FL
-Replaced Tifeagle ultradwarf with EMERALD
-Site of Arnold Palmer Invitational

Beechwood Country Club - Ahsokie, NC
-No-Till conversion from Bentgrass to CHAMPION

Bermuda Run CC - Bermuda Run, NC
-No-Till conversion from Bentgrass to CHAMPION

Big Oaks Golf Club - Saltillo, MS
-No-Till conversion from Bentgrass to CHAMPION

Bloomingdale Golfers Club - Valrico, FL
-No-Till conversion from Tifdwarf to CHAMPION

Blue Heron Golf Club - Sandy Springs, GA
-No-Till conversion from Bentgrass to CHAMPION

Brookstone Golf & CC - Acworth, GA
-No-Till conversion from Bentgrass to CHAMPION

Calusa Lakes Golf Club - Nokomis, FL
-No-Till conversion from Tifdwarf to CHAMPION

Covington Country Club - Covington, TN
-Greens sodded with EMERALD

Eagle Watch Golf Course - Woodstock, GA
-No-Till conversion from Bentgrass to CHAMPION

Falcon's Lair Golf Course - Walhalla, SC
-Greens renovation, planted CHAMPION

Hawk's Point Golf Club - Vidalia, GA
-Complete renovation, planted CHAMPION

Hole In The Wall Golf Club - Naples, FL
-Complete course renovation, greens replanted
with CHAMPION (previously planted 1998)

Holly Ridge Golf Links - Archdale, NC
-No-Till conversion from Bentgrass to CHAMPION

Hyland Hills Golf Club - Southern Pines, NC
-No-Till conversion from Bentgrass to CHAMPION

Jacksonville Beach GC - Jacksonville Beach, FL
-Greens renovation using EMERALD

Kiva Dunes Golf Club - Gulf Shores, AL
-No-Till conversion from Tifdwarf to CHAMPION

La Cita Golf & Country Club - Titusville, FL
-No-Till conversion from Tifdwarf to CHAMPION

Mirimichi Lakes Golf Course - Millington, TN
-Complete course renovation, greens replanted
with CHAMPION (previously planted 1999)

Montgomery Bell State Park GC - Burns, TN
-No-Till conversion from Bentgrass to CHAMPION

North Hills Country Club - Sherwood, AR
-No-Till conversion from Bentgrass to CHAMPION

Ocala Golf Club - Ocala, FL
-Greens renovation using EMERALD

Old Waverly Golf Club - West Point, MS
-No-Till conversion from Bentgrass to CHAMPION

Orangeburg Country Club - Orangeburg, SC
-Complete course renovation, greens replanted
with CHAMPION (previously planted 1997)

Pecan Grove Plantation - Richmond, TX
-Greens renovation using EMERALD

Pelican's Nest - Bonita Springs, FL
-Gator Course greens renovation, greens replanted
with CHAMPION (previously planted 2001)

PGA National - Palm Beach Gardens, FL
-Squire Course greens renovation using EMERALD

Pine Forest Country Club - Houston, TX
-Greens renovation using EMERALD

Pleasant Valley Country Club - Little Rock, AR
-No-Till conversion from Bentgrass to CHAMPION

Rebsamen Park Golf Course - Little Rock, AR
-No-Till conversion from Bentgrass to CHAMPION

Sandridge Golf Club - Vero Beach, FL
-No-Till conversion from Tifdwarf to CHAMPION

Sea Trail - Byrd Course - Sunset Beach, NC
-No-Till conversion from Bentgrass to CHAMPION

Seminole Golf Club - Juno Beach, FL
-No-Till conversion from Tifeagle to CHAMPION

Sequoyah State Park Golf Course - Hulbert, OK
-No-Till conversion from Bentgrass to CHAMPION

Shreveport Country Club - Shreveport, LA
-No-Till conversion from Bentgrass to CHAMPION

Spring Hill College Golf Course - Mobile, AL
-No-Till conversion from Tifdwarf to CHAMPION

St. Petersburg Country Club - St. Petersburg, FL
-No-Till conversion from Tifdwarf to CHAMPION

Stillwater Golf Course - Arrington, TN
-New Construction, CHAMPION greens

The Claw at USF - Tampa, FL
-Greens renovation using CHAMPION

The Tennessean Golf Club - Springville, TN
-No-Till conversion from Bentgrass to CHAMPION

TPC Prestancia - Club Course - Sarasota, FL
-No-Till conversion from Tifdwarf to CHAMPION

TPC San Antonio - Oaks - San Antonio, TX
-New Construction, CHAMPION greens
-Site of SBC Championship, Valero Texas Open in 2010

TPC San Antonio - Canyons - San Antonio, TX
-New Construction, CHAMPION greens

TPC Tampa Bay - Lutz, FL
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Together they greatly reduced budget stress and kept course conditions at levels consistent with member expectations.

Superintendent John Westermeyer is part of the lucky minority who avoided budget cuts. The ownership at the private Twin Lakes Golf Club in Carmel, Ind., has always emphasized operational efficiency. And as a result, Westermeyer runs a lean maintenance operation.

"Because we're a private club the ownership realizes that we can't let course conditions slip and expect to survive in this market," he says. "I've always tried to do the best I can with what I have, but at the same time, the club's ownership realizes that we need resources to operate at a certain level."

For many the failing economy

For more facts and figures on superintendents' views on their 2009 and 2010 budgets, as well as additional coverage on this topic, check out the December online extras at golfcourseindustry.com.

and its inevitable impact on the industry provided enough advanced warning that they were able to prepare accordingly. Some cut spending early in the season to better position themselves for additional late-season cuts that may or may not have transpired at their courses.

For example, superintendent Ben Babbage spent the last two years increasing efficiencies at Storm King Golf Club in Cornwall, N.Y. For his preventive measures, he circumvented cuts this year and eliminated an additional \$50,000 from his maintenance budget while his peers struggled

to make ends meet.

"I saw this coming and I knew we were eventually going to need to come back," he says. "So now we're in a much easier financial position than other courses in our market."

And as a result, Babbage won't hesitate to ask his green committee to sign off on a few essential, big-ticket equipment purchases heading into 2010. "Now I've got a better leg to stand on (for these purchases) because I was able to make the cuts and save the course money," he says.

Many superintendents acted creatively with their budget cuts to eliminate costs but maintain playability. While 68 percent of superintendents said 2009 budget cuts affected their ability to adequately maintain course conditions, 47 percent said only they noticed the changes, and 21 percent said players and members had noticed some changes due to reduced spending.

LOOKING AHEAD

The maintenance budgets enjoyed three to five years ago won't be back anytime soon, superintendents say.

While half expect to operate at the same level in 2010, 37 percent of golf course superintendents anticipate their budgets will be cut again, according to Golf Course Industry data. As a result, 64 percent expect to make labor cuts next year, as well as to cut spending on golf course accessories (77 percent), mowers (72 percent) and fertilizer (71 percent).

But re-evaluating budget expenses is not necessarily a bad thing, says Thomas Lipscomb, the superintendent at River Bend Golf and Country Club in Great Falls, Va.

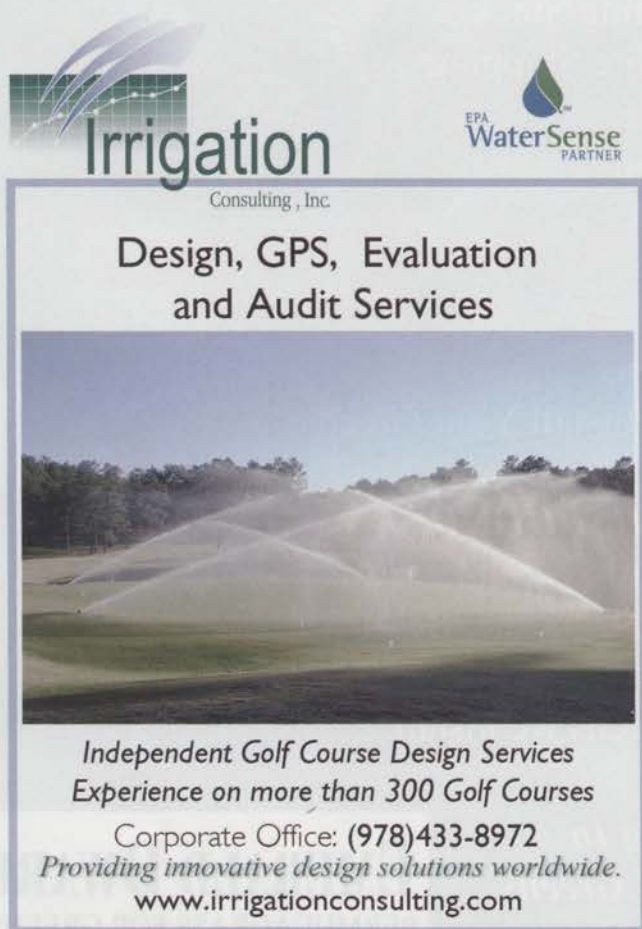
"Scaling back isn't always the worst thing in the world because it can be a real eye opener," he says. "I think this experience is sharpening superintendents' skills because it's forcing us to be more conscious of labor issues, to consider IPM (integrated pest management) practices and to communicate better and more often with our boards and committees to explain what these cuts will entail and how this will impact the greens and playing conditions."

While some cuts are good, MacDonald argues that some choices are a major gamble, and being on the losing end could be costly. And he's not alone. Fourteen percent of superintendents expect budget cuts could begin having repercussions at their courses beginning in 2010.

"It's like Russian Roulette," MacDonald says. "Let's say you cut your chemical (pesticide) spending to save some money over two years. Down the road this could have a mushrooming effect because now you can't afford to control all of the weeds and grubs that have invaded your course. So that money you initially tried to save will now come back and cost you much more just to fix these problems."

The prognosis for the industry, though, is not all doom and gloom. Many golf course superintendents believe the industry will recover, albeit at a much slower rate than the rest of the economy. And while it's not immune to the ripple effect of the national recession, the golf industry is resilient and will persevere, superintendents say.

"Golf courses can and will survive this recession," Babbage says. "For superintendents it's going to come down to what the members want in their course. That's what we need to figure out going forward, how much will that cost – whether it's in money or more time and effort on our part – to make them happy." GCI



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