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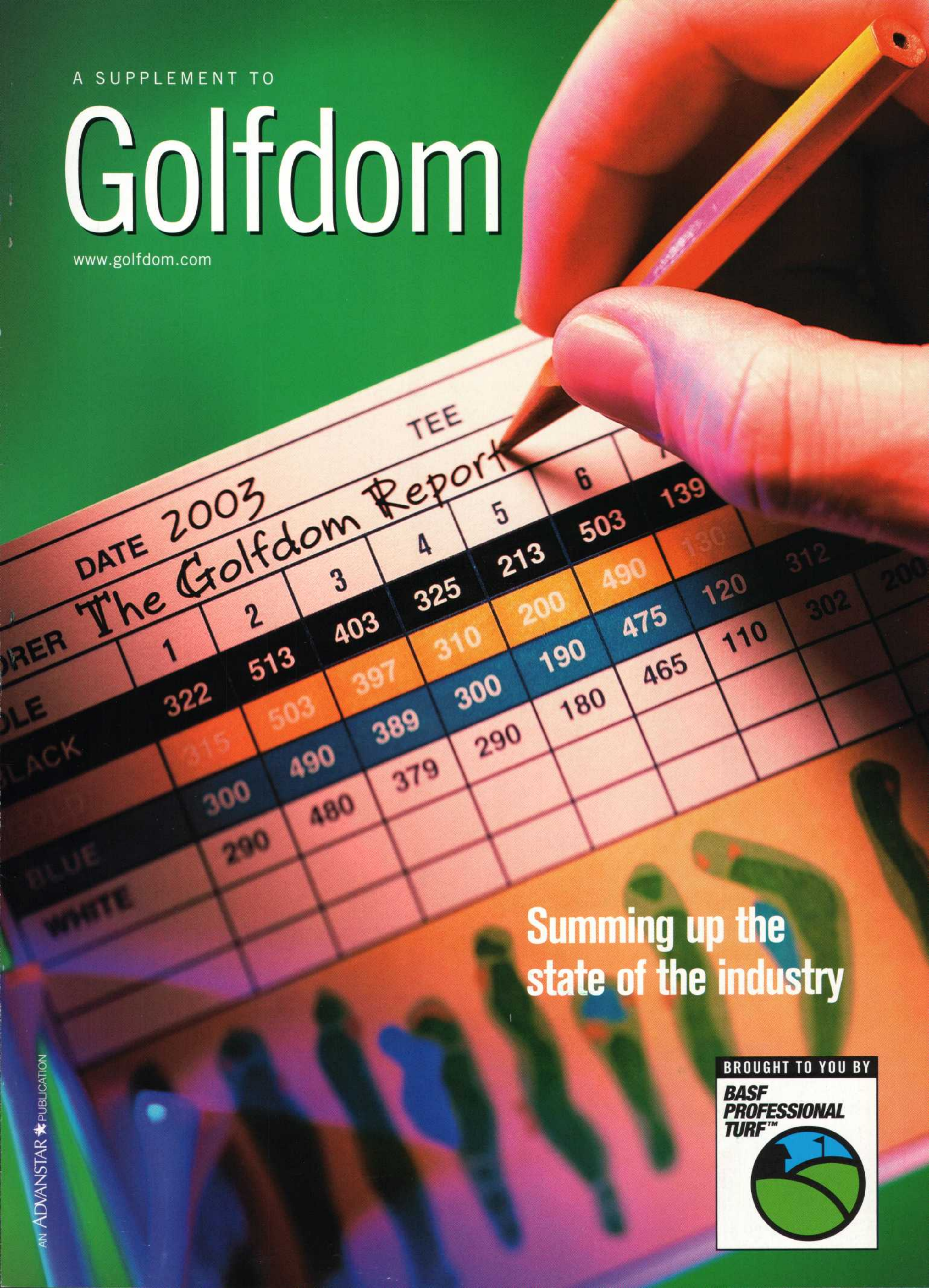

Summing up the state of the industry

BROUGHT TO YOU BY
BASF PROFESSIONAL TURF™

AN ADVANSTAR PUBLICATION

BASF Professional Turf & Ornamental

A Committed Partner in Competitive Times

For superintendents, player expectations and financial pressures have never been greater than they are today.

You've seen the reports and likely experienced it firsthand – reduced rounds, increased pressure to maintain tour-quality turf, and tighter maintenance budgets. As competition for fewer players increases and budgets decrease, more critical eyes and heavier burdens are falling on the superintendent's already burdened shoulders.

"At BASF, we know there's never been a greater demand in the golf industry to achieve high-quality performance," said Mike Toce, business manager, BASF Turf & Ornamental Group.

"Superintendents need every advantage possible and they're looking for companies that do more than simply offer products – they're looking for committed business partners who have an equal stake in their success."

Helping superintendents succeed drives The BASF Turf & Ornamental Group. It's a commitment backed by action.

BASF listens.

Its sales team and distributor-focused network are on the course every day listening to local challenges and providing products and advice that offer solutions for the superintendent, while improving the turf they manage.

"We understand turf issues because we listen to superintendents and university experts and solve problems by applying resources from our global network of researchers and developers," said William Strickland, senior marketing manager, BASF Turf & Ornamental. "Turf challenges are dynamic, not static, and we are committed to continuous improvement to help our customers succeed this season and years to come."

As professional development resources for superintendents become more scarce and time becomes tighter, BASF has taken leadership roles with GCSAA – at both the regional and national levels – and the Fungicide Resistance Action Committee. By sharing fungicide and herbicide research and development findings, stewardship principles, and product training, BASF is working to help superintendents become more knowledgeable and effective in shorter amounts of time.

BASF global chemical leadership meets local turf challenges.

With research and development investments, BASF is applying its resources to provide the golf industry with higher performance products.

The most obvious example of the BASF commitment to action is its development of new chemistries to solve golf turf's most destructive pathogen: fungi.

In the past year, BASF has registered two new fungicides - **Insignia**® and **Emerald**® - that help superintendents meet competitive market pressures, as well as control the most difficult fungi, including dollar spot. With these two new fungicides, BASF now has an arsenal of products that provide efficient use of limited budgets, time savings and, ultimately, improved professional reputations.

Insignia® FUNGICIDE

After more than 130 EUP fungicide trials at golf courses and years of research and testing, BASF recently received EPA registration for its **Insignia**® **fungicide**, giving superintendents a new generation of enhanced strobilurin chemistry and a new active compound, pyraclostrobin.

"The discovery of pyraclostrobin by BASF has added yet another component to the turf fungicide market," said Dr. Wakar Uddin, Pennsylvania State University. "Its control of a wide range of turfgrass diseases caused by fungi from various classes is its major strength, and such an extraordinary broad-spectrum nature of this new strobilurin will undoubtedly become a strong component in an integrated disease management program."

In course trials, **Insignia** is helping superintendents solve problems and boost reputations.

"Wherever we used **Insignia**, we had no turf disease problems," said Bob Zuercher, superintendent at Blackmoor Country Club, Myrtle Beach, S.C. The course traditionally had brown patch and dwarf bermudagrass outbreaks.

Unlike some older strobilurin chemistries in the market, **Insignia** suppresses dollar spot, instead of flaring it, and gives users longer control (up to 28 days on select turf diseases). Longer control saves superintendents labor and material costs, and minimizes spraying time on the course.

"Adding **Insignia** to the BASF fungicide and herbicide portfolio gives golf course superintendents a single source for complete pathogen control," said Allison Moskal, regional sales manager, South and West U.S., BASF Turf & Ornamental. "**Insignia** is a foundation product for reliable disease control and, when rotated properly with non-strobilurin chemistries such as **Emerald** and **Curalan® EG**, gives superintendents the industry's most complete dollar spot control."

Emerald®
FUNGICIDE

Emerald couldn't have arrived at a better time for golf course superintendents trying to maintain exceptional turf quality.

In recent years, the severity of dollar spot has been increasing as the disease has developed resistance to many of the fungicides traditionally used to fight it, such as benzimidazoles, dicarboximides and sterol inhibitors.

Emerald® fungicide is the first all-new class of fungicide chemistry for dollar spot control in years, giving superintendents a new weapon to manage resistance issues, especially dollar spot resistance. Its active ingredient, boscalid, attacks pathogens that cause dollar spot and other turf diseases by inhibiting respiration within the fungal cell. Boscalid belongs to a class of chemistry known as anilides, which have never been used in the turf market. Because both its mode and site of action differ from other fungicides, **Emerald** can effectively control pathogens that have developed resistance to other chemicals.

University testing supports the **Emerald** chemistry's ability to control dollar spot.

"Many frustrated turfgrass managers have encountered fungicide-resistant strains of dollar spot," said Nathan R. Walker, assistant professor at Oklahoma State University. "The excellent activity of **Emerald** against dollar spot has great implications for disease management programs. It's a new class of chemistry for dollar spot and is effective against dollar spot isolates, which are resistant to benzimidazoles, dicarboximides and DMI (sterol-inhibiting) fungicides."

In addition to its unique chemistry, **Emerald** saves superintendents time by providing reliable dollar spot control for up to 28 days. That efficacy decreases spraying time and increases time for superintendents to tackle other course challenges.

Listening, innovating, acting.

BASF is enhancing the quality of today's turf and the reputations of today's superintendents. In an environment of increasing pressure, BASF is committed to being a resource for effective and reliable solutions for superintendents. By listening, innovating and acting, BASF is working with superintendents to improve the state of the golf industry.

BASF may not make the turf, but it is making it better – along with the reputations of those who manage the turf.

BASF Professional Turf & Ornamental Management Team

Mike Toce
Business Manager
BASF Turf & Ornamental

William Strickland
Senior Marketing Manager
BASF Turf & Ornamental

Brian Brochin
Marketing Associate
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Allison Moskal
Regional Sales Manager
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Another Trying Year

But there are signs that point to ... dare we say ... an upturn

BY LARRY AYLWARD,
EDITOR

Two years ago we reported that the difficult economy was an integral issue facing the golf course maintenance industry. Last year we reported the same thing. This year ... you guessed it.

Times were tough for superintendents and their golf courses in 2003 — and then some. A whopping 74 percent of superintendents say the poor-performing economy affected rounds at their courses, according to a *Golfdom* online survey of more than 300 superintendents conducted in October. Fifty-seven percent of superintendents said their rounds were off between 5 percent and 15 percent. Tough economic times often lead to budget cuts, and 2003 was no exception for many superintendents.

Superintendents are confident that golf cars at their courses will get more use in 2004.

DYNAMIC GRAPHICS

The first story (page 4A) in our third annual *Golfdom* Report reports on these issues and more. Two years ago, we reported that many superintendents — and plenty of financial analysts — expected the sour economy to turn sweet the following year. It didn't, and it didn't this year either. We're not making any predictions for next year, but there are signs that point to ... dare we say ... an upturn. Recent national economic news has been positive. Also, many superintendents — and maybe we shouldn't report this — say they're optimistic about 2004.

Also in this year's *Golfdom* Report is a story about the state of the job market (page 14A). Many industry people have questions about their profession. Is it a crowded market place? Are there enough jobs for capable graduates? Will finding a job require relocating? And how long will it take to move up the ranks and become a head superintendent? We try to answer these questions as best we can.

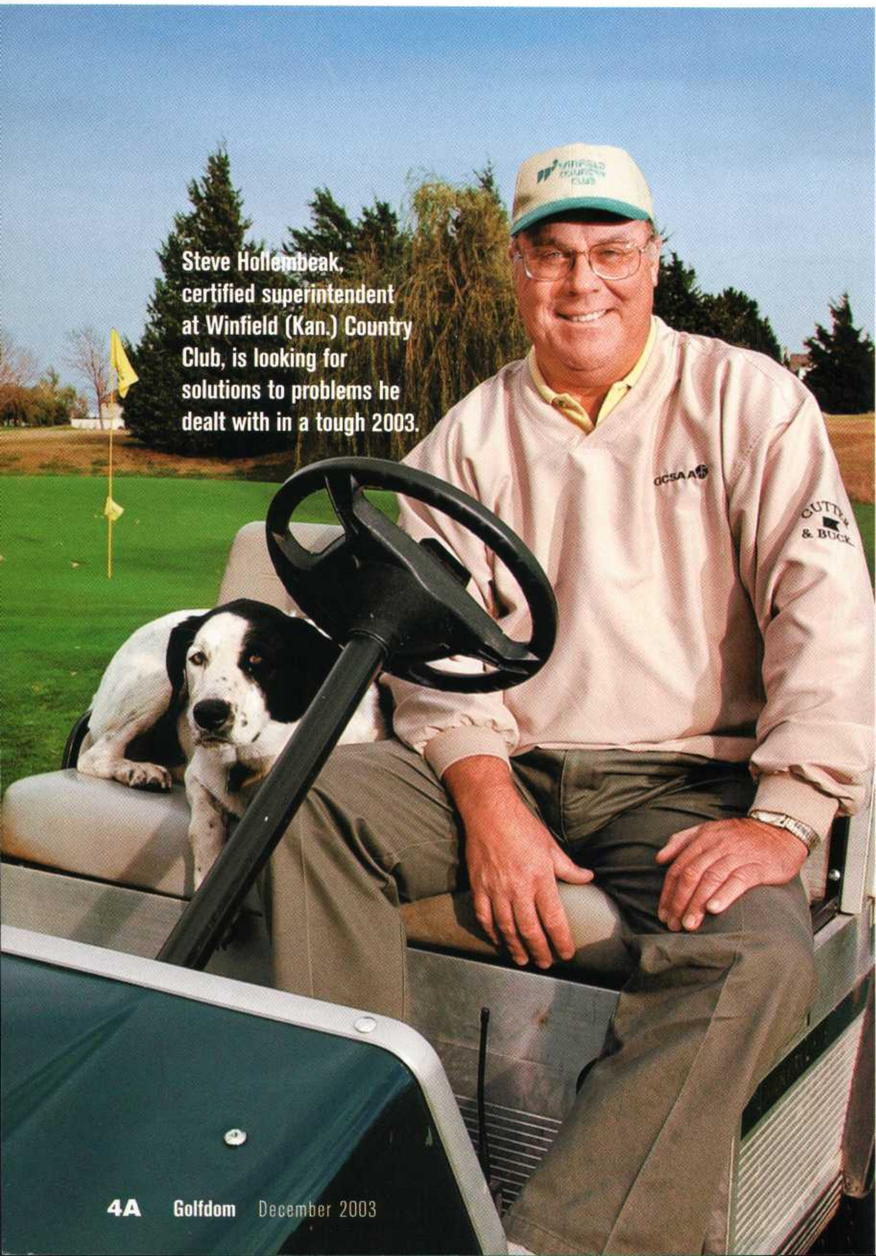
Both stories in the report also feature information charts garnered from our recent superintendent survey. Additional charts appear on page 20A.

Finally, we would like to hear what you think of this report. Please contact me at *laylward@advanstar.com* or Managing Editor Frank Andorka at *fandorka@advanstar.com* to give us your views and any story ideas you might have for 2004.

Still Struggling

The recovery some expected this year may have to wait until 2004

BY FRANK H. ANDORKA JR.
MANAGING EDITOR



Steve Hollembeak, certified superintendent at Winfield (Kan.) Country Club, is looking for solutions to problems he dealt with in a tough 2003.

LARRY SMITH

For the first time in his career, Steve Hollembeak is seriously thinking about life after being a superintendent.

Hollembeak, certified superintendent of Winfield (Kan.) Country Club, isn't worried that he'll lose his job over something he did or didn't do. He gets along with his general manager and the majority of members, and his golf course is in good shape. Unfortunately, the area's economy is not.

Winfield is a town of 12,000 people located 45 minutes south of Wichita, where memberships at local country clubs are highly priced. Bedroom communities just south of the city teem with golfers who want the private club experience at a lower cost. When times were good, many golfers from those areas would drive down I-35 to play Winfield for not much more than it would cost them to play public golf courses near their homes.

But Wichita's economy, heavily dependent on airline manufacturers, struggled as early as 2000, and Sept. 11, 2001, sent it into a tailspin. Airline giants like Lockheed Martin and Boeing slashed jobs by the thousands. As those good-paying manufacturing jobs disappeared, so did many Winfield memberships.

The club that used to have 300 members

now boasts only 215. The remaining members have asked Hollembeak to cut his maintenance budget for the third straight year because of declining revenues, and the superintendent believes he's getting close to the point where he won't be able to keep the course in the condition members expect. He's also worried that the area airline manufacturers are planning to cut even more jobs by 2005, which could drive membership levels down even further.

"We're kind of hurting," Hollembeak says. "It's not that I think losing my job is imminent. But it's a lot harder to keep it from creeping into the back of my mind the longer the economy continues to struggle."

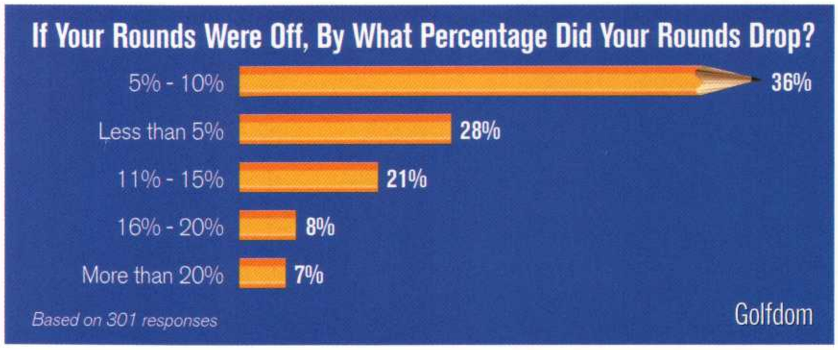
Hollembeak's comments echo those of his colleagues and other members of the industry around the country as they review 2003. Between an economy that continued to struggle, bad weather in some sections of the country that suppressed rounds (and therefore revenues) and an underlying sense that there are just too many golf courses to maintain adequate revenue streams for them all, the news wasn't that good for the industry in 2003.

Still, some industry players say the last two quarters of 2003 showed rounds increasing as the weather moderated and the economy showed small signs of creeping toward a sustained recovery. So 2004 could be the year when the golf industry starts its long road back to economic stability.

Economic struggles

In the minds of many members of the golf course industry, 2003 will be remembered as a year where everyone had to hunker down. According to *Golfdom*'s 2003 state of the industry survey, 74 percent of superintendents say the economy affected rounds at their courses, and 57 percent of superintendents said their rounds were off between 5 percent and 15 percent.

The financial decision-makers must have had strong stomachs in the face of economic hardship, however, because only 32 percent of superintendents say they were asked to cut their maintenance budgets in the middle of the year despite the steep dropoff in revenue. Still, in a year that was supposed to mark the return of the golf industry to better form, 2003 was a disappointment.



"I thought it was going to be better than it was," says Meriam Leeke, owner of Old Channel Trail Golf Course in Montague, Mich. "There are too many courses in many areas, and the weather and the economy didn't help at all. You could see it in the bottom line."

In the case of Sodus Bay Heights Golf Course in Sodus Point, N.Y., a precipitous drop in revenue couldn't be happening at a worse time. Memberships are falling at the semiprivate course at the same time that bonds used to finance a new irrigation system seven years ago are starting to mature. That means the club has to pay them back, but the money is hard to come by.

"People just can't afford to belong to golf clubs like they used to," says Steve Boone, superintendent at Sodus Bay. "Revenues here are down considerably, and I don't know when we're going to get them back."

Maintenance budget cuts have forced Boone to put off buying new sand for the bunkers and postponing new equipment purchases, and he may have to cut at least two crew members to get to the 2004 budget number his members have given him.

Tom Bruff, managing director of Dallas-based consulting firm KPMG's golf practice, says the combination of factors currently keeping the golf industry from performing well are as bad as he's seen

Continued on page 8A

Toce: Roller Coaster Year For Chemicals

Mike Toce, business manager of the turf and ornamental division of BASF, says 2003 was a roller-coaster year for the chemical companies.

Bad weather in the spring inhibited early-year chemical use, but more normal weather in the summer and fall turned what could have been a disaster into a normal year, he says.

"We started the year with major concerns because the weather was a significant problem in many areas of the country," Toce says. "But in June and July, normal weather patterns returned, and we finished the year on a strong note."

BASF also restructured itself after a merger with TopPro Specialties, a firm that focused on creating post-patent products. Toce says the merger of the two companies allowed BASF to expand its portfolio in ways that allowed it to smooth out what could have been a rough year. "We didn't have much disruption as a result of the merger," Toce says.

"It's easier to register combination products with the Environmental Protection Agency than new products," Toce says. "We'll probably spend most of our time doing that."

– Frank H. Andorka Jr., Managing Editor

Wiley: Relationships Make the Difference

John Wiley, president of Turf Supply Co. in Eagan, Minn., says 2003 was a year of slow but steady growth, largely because of the relationships that exist between superintendents and independent distributors like his company.

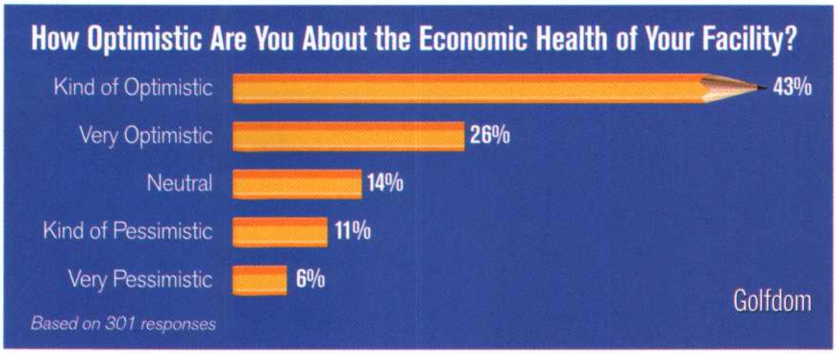
"Superintendents are putting down fewer chemicals and fertilizers, and budgets are tight across the board," Wiley says. "That's why it's so important for distributors to have good relationships with the superintendents they serve. Good relationships can smooth out rough patches in the economy."

Wiley says he believes 2004 will be another year of steady growth for manufacturers and independent distributors. With the overall growth of the golf industry flat or declining, however, market-share growth for manufacturers will come from other companies or other markets like lawn care.

The emphasis on loyalty programs and the packaging of products to superintendents by manufacturers is causing concerns for superintendents and distributors because the idea of buying a preselected package of products may limit their flexibility.

"We're a remarkably stable segment of the industry," Wiley says. "We don't necessarily have great years all the time, but we tend to operate on an even keel. We're looking for a little upswing next year."

– F.H.A. Jr.



Continued from page 5A

in his 18 years in the industry. At the heart of the problem is that most markets in the United States remain overbuilt after the exuberant building of the 1990s.

"Supply continues to outpace demand," Bruff says. "I don't see anything on the horizon that indicates demand will grow exponentially in the near future. There's a chance we'll be in the doldrums for at least five years unless there's a huge increase in demand or significant supply is removed from the market — neither of which I see happening."

In general, Leeke agrees with Bruff's assessment. She says the number of outings at her course was down in 2003, and leagues don't have as many players as they've had in the past. She realizes that each lost golfer is lost revenue.

"We haven't done enough as an industry to create more golfers and keep them in the game," Leeke says. "We keep lengthening public courses for people who don't have time to play for six hours."

On her own course, Leeke added three short holes around her driving range that can be played in 35 minutes. She says she gets many beginning golfers and those who want to play on their lunch hours.

"For the beginners, we believe they'll graduate to the longer course when they feel comfortable enough," Leeke says. "For the others, it's a great way to bring in extra revenue and make them want to come back."

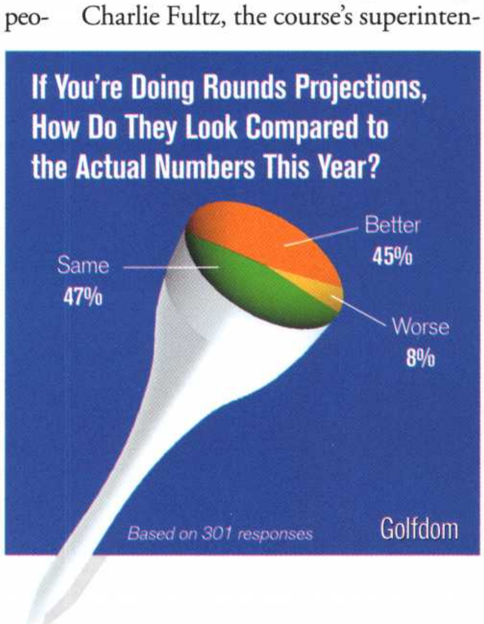
Weather woes

When golf courses are struggling to make ends meet, they can't afford to lose weekends to bad weather. In 2003, steady rain from early spring to June suppressed the number of rounds played in many areas. Golf courses from Maine to Florida saw revenues fall.

"A couple of regions had rough weather patterns this year that made it difficult for them to make money," says Mike Hughes, executive director of the National Golf Course Owners Association (NGCOA). "The Mid-Atlantic and New England regions were negatively affected by abnormally wet weather during the spring and early summer."

The Shenvalee Golf Resort, nestled in the picturesque Blue Ridge Mountains of Virginia, felt Mother Nature's wrath in the early part of the season. The bad weather, which started in October 2002, continued into the spring.

"We were 13 inches over the normal amount of rainfall through June," says Charlie Fultz, the course's superinten-



dent. "People started blaming me for all the precipitation.

"They said I brought it with me when I came here [in April]," he added laughing. "After a while, I started to wonder if they might not be right."

Fultz says resort rounds overall are down 15 percent. Daily-fee rounds — from itinerant golfers driving from other parts of Virginia to play — are down 20 percent. Still, Fultz says he has reason to be grateful because the resort guests prevent him from suffering as severe a revenue shortfall as some of his brethren in the area have.

"I can't imagine a day when the resort isn't full," Fultz says. "Even this year, the rounds weren't as bad as they could have been because people who stay at the resort come here to play golf, and it's almost always at full occupancy. Some of the other high-end daily-fee courses around here can't say that."

Dealing with overbuilding

One of the most intractable problems the golf industry faces, however, is the question of overbuilding. KPMG's Bruff says it's the biggest problem facing the industry. The easiest solution to overbuilding is to remove some of the supply from the market by turning golf course properties to other land uses, but it's not that simple.

"So many golf courses that are being built now are connected to housing developments," Bruff says. "Once the developer has made the sale on that basis, it's hard to turn the land into some other use. There are legal reasons having to do with housing contracts that prevent it."

Bruff says he's seen few golf courses changing hands in recent years because many owners aren't willing to come down on price and risk losing money on courses they invested in such a short time ago.

"Low interest rates have allowed some

Continued on page 12A

Breningmeyer: Tough Year In the Iron Industry

Gregg Breningmeyer, director of marketing and sales for John Deere Golf & Turf One Source, says 2003 was a tough year in the equipment market because golf courses struggled to bring in revenue. That made them less likely to purchase new equipment.

"The supply-and-demand equilibrium is getting more and more out of whack," Breningmeyer says. "There are more golf courses than there are golfers, and that hurts overall revenue. There's less to put toward new equipment."

Rainy weather in some parts of the country also depressed round and revenue numbers, which meant golf courses didn't have the money to spend, Breningmeyer says. "People's budgets were under extreme pressure, and equipment was one of the easier places to cut."

Breningmeyer says what he's heard from many superintendents is that equipment purchases have been put off until revenues return to more normal levels. He says that could happen in 2004.

"The third- and fourth-quarter numbers are looking pretty robust," he says. "The economy looks like it's on solid ground. If you assume normal weather patterns, we're looking to grow in 2004."

He said John Deere expects the equipment market to grow by 2 percent to 3 percent in 2004. **– F.H.A. Jr.**

McWhirter: Irrigation Renovations Drive Bottom Line

Rod McWhirter, national specification manager for Rain Bird's golf division, says the irrigation industry is increasingly depending on the renovation market for its income.

New golf course construction is continuing its downward trend since the late 1990s. With many areas of the country oversaturated, fewer courses are being built each year, McWhirter says. As a result, irrigation companies have had to rethink their business models.

"It used to be that as new golf course construction went, so went the irrigation market," McWhirter says. "We've found new opportunities in the renovation market."

In 2003, the renovation market remained brisk because so many of the courses built in the 1980s and 1990s have irrigation systems that need to be upgraded or replaced, McWhirter says.

"Golf courses need irrigation, and these older systems don't have the water-saving and energy-saving properties of the newer technology," McWhirter says. "Since members can see immediate savings in those areas, they're more likely to spend money on an upgrade than they would on other projects. They may delay a project, but they will rarely cancel it outright."

McWhirter says Rain Bird expects a similar business model to hold in 2004.

"We're not expecting to see a huge boom in new course construction, so we're planning for more of the same," he says. "That's where we're focusing our energy."
–F.H.A. Jr.

Elyea: Ryegrass Fuels Seed Comeback

Rick Elyea, director of golf for Turf-Seed, says the rise in ryegrass prices balanced out falling prices on other varieties in 2003, leaving seed producers feeling good about their performances in 2003.

"There had been an oversupply of ryegrass for years that drove down prices," Elyea says. "That led farmers in Oregon to take many of those fields out of production, either by growing other crops or changing grass varieties. That paid off this year with better prices for the producers."

Rising prices led some superintendents to switch their overseeding practices, Elyea says. Some switched from strictly ryegrass to a perennial ryegrass/fine fescue mixture, while others reduced the number of acres they overseeded.

"We saw some squeezing of budgets this year," Elyea says. "As superintendents create their budgets for 2004, they should make sure they have enough money for overseeding."

Elyea says he's expecting the total volume for seed purchases to rise in 2004. He also believes more seed research will focus on glyphosate-tolerant and salt-tolerant grasses.

– F.H.A. Jr.

Continued from page 9A

golf course owners to hold on to assets they normally would have been forced to dispose of," Bruff says. "It's a slow market out there."

Bruff's assessment would come as no surprise to Jeff Normandt, owner and superintendent of Valley High Golf Club in Houston, Minn. He's tried to sell his golf course for more than a year with little luck. Normandt waited 10 years and worked as a superintendent before fulfilling his dream in 1997 to own a course. But overbuilding and a cratering economy have buffeted the course's business. He planned to sell this year, but found a tough market.

"We had a significantly bad year this year that drove down the price people were willing to pay for the course," Normandt says. "We had terrific weather, but the Minnesota Department of Transportation decided to do major road construction on the *one* road leading to my course. That turned a lot of golfers off."

That, combined with a wicked price war with area golf courses, pushed revenues down 10 percent.

"All the courses in the area are struggling because prices are being cut so severely," Normandt says. "Halving prices is not the answer because all you end up doing is letting your regular players play for less money. You rarely bring in new players."

Normandt and his partner are exploring some opportunities with buyers, but the owner/superintendent seems resigned to waiting it out until he can get a decent price for the course.

Normandt says he and his partner hope to keep the books balanced over the winter. With luck, they will be able to sell the course early next year.

"My preference would be to sell it to someone who would keep me as superintendent," Normandt says. "That would be ideal."

Does it pain Normandt that his dream hasn't panned out? He pauses for a moment and then answers honestly.

"I try to ignore it," Normandt says of the uncertain situation surrounding the course. "When I'm out working on the course, it's easy. When I'm doing the general manager's job, it's a lot harder.

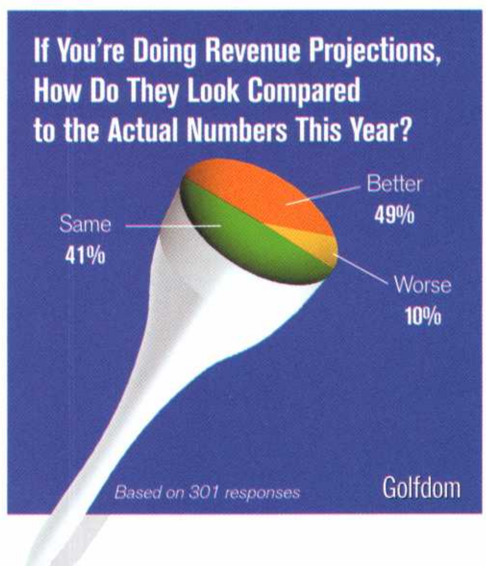
"I've come to grips with the idea that we don't have much choice other than to keep on doing what we've been doing," he continues. "The future is a little more stressful than the past or the present, but I don't have a single regret about making the purchase. How often in life do you get the chance to do something you really enjoy? That's what I'm doing right now."

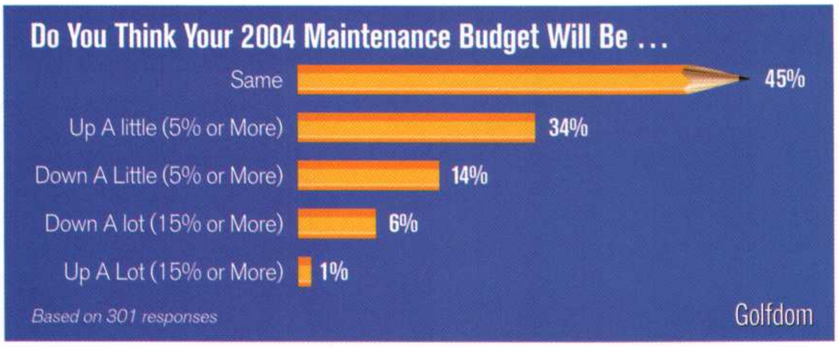
Institutional golf has good year

To avoid the vagaries that have plagued so many in the golf industry this year, the answer might be to become a superintendent at an institutional golf course, says Paul Brandenburg, superintendent of Furman University Golf Club in Greenville, S.C.

Don't get him wrong: 2003 was no picnic for Brandenburg either. The constant rain drove rounds down at the course from the expected 35,000 to 40,000 into the range of 20,000 to 30,000. It also made operations like chemical applications and overseeding difficult. But the safety and security of working for a public institution relieved some of the stresses that his daily-fee colleagues faced.

"When you work for a place like Furman, you're not totally dependent on every golfer that walks through the door,"





Brandenburg says. "There's a great support network here, and there's not the same pressure to have a perfect golf course all the time that you have in some private facilities. That's a comfort, particularly in a crazy year like this."

Though he has been forced to cut his budget in the middle of the year in each of the last two years, the financial overseers of the university don't question every purchase, Brandenburg says.

"I inherited a lot of old equipment, and they've let me replace some of it," Brandenburg says. "They look at the big picture and see that I need it. I don't have to worry about an argument over some of these things."

The same sense of institutional security enveloped Mike Jones, certified superintendent of the New Mexico Military Institute Golf Course in Roswell, N.M. He says it's actually been a good year overall, despite receiving 3 inches of rain when he normally sees 12 inches. He still faces battles from other golf courses in the overbuilt area — it has 45 holes for a town of 50,000 (not all of whom are golfers, Jones points out). But it's a fairly stable market where golfers switch from Jones' course to the local municipal and back again with ease.

"We've been watching the budget tightly to make sure we're not spending more than our fair share, but since we take care of the campus maintenance too, we don't get a lot of grief for lower rounds," Jones says. "We put forth the best product we can and let the golfers decide."

Looking forward to 2004

Despite a rough 2003, superintendents are remarkably bullish on the prospects for 2004. According to *Golfdom*'s survey, 73 percent of the respondents believe the economy will pick up in 2004. The 7 percent jump in gross domestic product in the third quarter of 2003 gives a glimpse that it might be true. (So do trends in some of the industry's major markets; see sidebars).

The NGCOA's Hughes says play picked up in 2003 at destination golf courses and high-end daily-fee courses as corporate outings business increased. The fallout from Sept. 11 seems to be dissipating.

"I can't say they've come all the way back, but there are signs of a recovery," Hughes says. "Corporate spending on golf is starting to come back some, and I expect that trend to continue in 2004."

Hughes says he will focus in 2004 on bringing more players into the game with innovative solutions like the ones Meriam Leeke is using in Michigan. "I'll be trying to persuade courses to sell golf differently — maybe in one-hour or 1.5-hour increments or creating a starter experience — that will fit better into the busy lives of today's golfers," Hughes says.

At Winfield Country Club, Hollembeak and his members are continuing their own search for solutions to the problems facing the club. Though they haven't figured it out completely yet, Hollembeak says he's ready for next year no matter what the future holds.

"We'll see how we come out of the budgeting process [that started on Nov. 1]," Hollembeak says. "I'm anticipating the economy to rebound in 2004, and that will help us. Until then, we'll just have to tough it out." ■

Matthews: Architects See Flat Market

Bruce Matthews, principal of Matthews Design Group, a Michigan-based architecture firm, says the architectural segment of the industry was flat in 2003, but the future may be murkier.

In part, the flatness of the market is the result of few courses being built, Matthews says. Financing for golf courses largely dried up after banks had trouble collecting on golf course loans they made in the late 1990s.

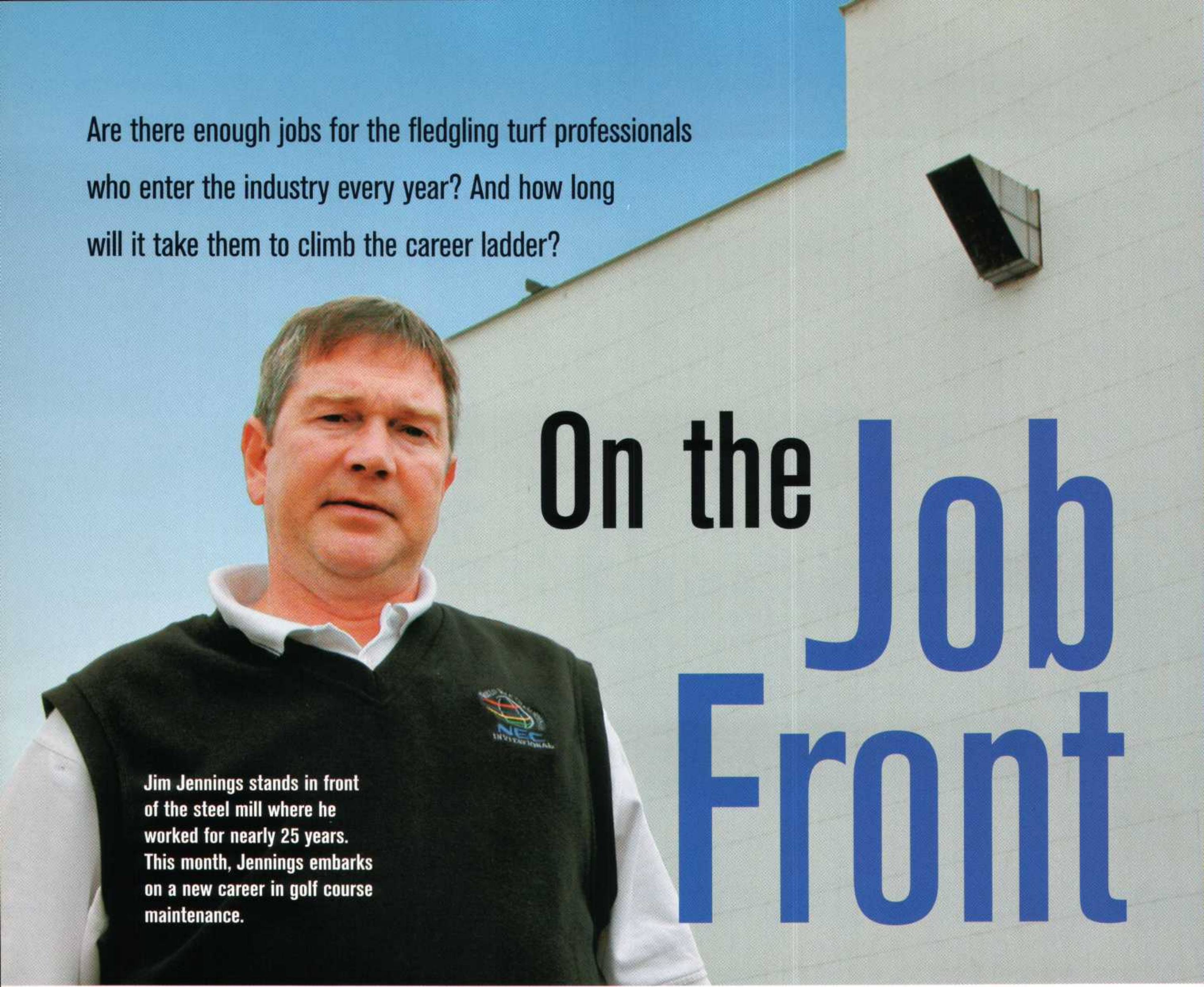
"The days are over when banks will loan money to just anyone because golf is connected with a project," Matthews says. "The golf industry won't recover until after the economy has fully recovered."

Matthews believes it will be at least two to three years before the market turns around.

Though new-course construction is down from three years ago, the architecture market was supposed to be buoyed by courses in need of renovation. Matthews, whose business is 60 percent renovations, says even that market has taken a downturn as course revenues have dropped. "It's not just me — that's what I've been hearing from a lot of my colleagues," he says.

He said his three-person shop ditched the office space they were renting in favor of home offices to cut down on expenses during this downturn. But he believes the market will eventually turn around.

– F.H.A. Jr.



Are there enough jobs for the fledgling turf professionals who enter the industry every year? And how long will it take them to climb the career ladder?

On the Job Front

Jim Jennings stands in front of the steel mill where he worked for nearly 25 years. This month, Jennings embarks on a new career in golf course maintenance.

LARRY AYLWARD

BY LARRY AYLWARD,
EDITOR

It's desolate now. The steel mill in Massillon, Ohio, where Jim Jennings toiled for nearly 25 years, is hollow of machinery and vacant of humanity.

Jennings leans on the rusty chain-link fence that surrounds the vast structure formerly named Massillon Stainless Inc. He gazes up at the colossal 13-story, bland-looking building that houses the steel-making furnace he once operated. There's joyless silence in the air, but Jennings can still hear the ferocious and blissful sound of the once-mighty furnace in his mind.

It's distressing for the 46-year-old Jennings to be here on this autumn day. It's the first time Jennings has returned to the mill — the place that provided the paycheck that helped him feed and clothe his family since 1978 — since he and about 60 others were laid off about 14 months ago.

Jennings had been laid off before from the mill, but he was always recalled. But when the mill announced it was closing for good in October 2002 and moving its machinery to China, Jennings knew he was never going back.

But Jennings, mindful of the volatile industry he was employed, considered another livelihood back in the early 1990s. He enrolled at The Ohio State University's Agricultural Technical Institute (ATI) in Wooster, Ohio, to study turfgrass management in 1992. This month, 11 years later, Jennings will receive a two-year degree and embark on a new career.

He's excited but understandably apprehensive about his future. Jennings wants to be a superintendent, but he knows his new field is a competitive one.

"Sometimes I wake up in the middle of the night and wonder if there are any jobs out

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there," Jennings says. "That's the scary part."

Jennings isn't the only one waking up worried at four in the morning. Every year a horde of fledgling turf professionals, armed with two- and four-year degrees, enters the industry with the will to flourish. But they're also leery of the job market they will find.

They have many questions about the health of their profession. Is it a crowded market place? Are there enough jobs for capable graduates? Will finding a job require relocating? And how long will it take to become a head superintendent?

The pragmatic Jennings says he's not looking for a dream job. He just wants to work with capable people, learn the business and gain experience. And he'd like to do all those things close to home for a few years while his 14-year-old son Jordan, his only child, finishes high school.

Time will tell if Jennings and other graduates will find what they're looking for. But one thing is for certain — they will find an industry that has suffered from the dismal economy the past few years. However, that shouldn't intimidate them, says Tom Watschke, longtime professor of turfgrass science at Penn State University.

"The sky isn't falling on the golf course industry," Watschke says. "Are times a little tougher? There's no denying that. Is this a permanent state? I don't think so."

Starting out

Though people study golf course maintenance for myriad reasons, a common one is their desire to work outdoors.

Jennings worked several odd jobs after he was laid off from the steel mill in 1989. A few years later, he learned he was eligible for a government job-training program set up for displaced steel employees.

As part of the program, Jennings took a personality test, which revealed his love of golf (something he already knew) and his interest in working outdoors. A job

"Sometimes I wake up in the middle of the night and wonder if there are any jobs out there."

– Jim Jennings

counselor suggested he attend Ohio State's ATI, which was funded through the job-training program.

In the spring of 1992, Jennings began going to school part-time at ATI and worked as a starter at a nearby country club. He also tended bar. But when he was called back to work at the mill in 1995, he ditched school because he needed a steady paycheck to support his family, and the mill provided it.

Jennings was laid off again in 1999. He went back to school in 2000 and was recalled to the mill again a short time later. But he was let go for good last fall.

Even though it took Jennings more than a decade to get his degree, he says he loved learning about entomology, turf species and other subjects. "I'm passionate about this industry," he says.

Jennings, who sports a 10 handicap, hopes his passion helps land him a job as an assistant superintendent. He might like his chances.

Kim Heck, GCSAA's director of career development, says her conversations with established superintendents reveal that golf courses in some regions of the country need assistant superintendents now. A reason for this is that many golf courses have been hiring more assistants — first and second positions — the past few years.

"The average superintendent has 20 people reporting to him, compared to 17 people in 2000," Heck says.

GCSAA relies on anecdotal information to monitor the job market. It doesn't conduct scientific studies to determine how many people join and leave the industry annually.

Heck says she and other GCSAA representatives meet with students every year and talk to them about employment. Heck says students in the past three years have told her they're confident about getting jobs after graduation. "The students paint a fairly bright picture."

That said, Heck notes that not all students will be able to secure the jobs they most desire. They may have to settle on taking positions as equipment technicians or spray technicians if they can't get jobs as first or second assistants.

Bruce Clarke, director of the Center for Turf Science at Rutgers University/Cook College, realizes that golf course construction is down, but he still says the school has not had any problems placing its graduates. About 12 students graduate from the school's four-year turf program annually.

Clarke says the school has experienced a dip in applications for its two-year certificate program. While he admits the troubled economy might have something to do with the decrease, he is certain that the GCSAA's push to enhance the profession from a credibility standpoint — a four-year degree is better than a two-year degree — has something do to with it.

Penn State has two programs — a two-year program that's specific to golf turf and a four-year turfgrass science program. The former program graduates about 25 people annually. The latter program graduates about 40 people each year. Not all of them go into golf course maintenance. In fact, Watschke says the percentage of graduates going into golf course maintenance has been decreasing because of career growth in other areas of the turf industry such as sports turf.

Watschke says Penn State hasn't had a problem placing its students in jobs for several years. No, they're not landing big-cheese positions. But, as Watschke points out, most graduating students do not land jobs as top superintendents directly out of school, no matter what the job market is like. "Less than 1 percent of our students get those jobs."

The industry has grown substantially in the last 30 years, and jobs now often require a college education, Watschke notes.

"As we approached the 1980s, the notion of having a college-trained assistant became popular and a necessity," Watschke says. "Fast-forward another 10 years, and it's not uncommon for a superintendent on an 18-hole property to have a first and second assistant. Fast-forward to 2000, and it's not uncommon for a course to have a college-trained person as a spray technician/pest scout. There are even college-trained irrigation technicians on courses."

Watschke's point is there are plenty of jobs for graduates, even if new-course constructions have dropped from about 400 in 2000 to roughly 235 this year. He says second assistants in the Mid-Atlantic region are paid between $28,000 and $32,000. A first assistant makes a few thousand more.

Bruce Williams, certified superintendent of the Los Angeles Country Club and an industry veteran, advises people looking for work to monitor the golf industry from an economic standpoint. They might not want to consider work in areas where courses have shut down and laid off employees. "It's all about supply and demand," he says.

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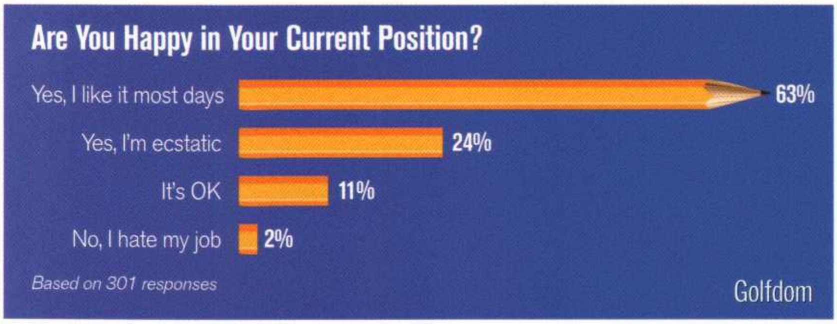

One Man Who Got Out of the Profession

Hocutt was tired of the pressure and politics that come with being a superintendent

Sam Hocutt had enough. Worn out from the long hours and work-filled weekends, not to mention the pressure and the politics that often come with the territory, the 43-year-old Hocutt quit his job earlier this year as certified superintendent of Pawleys Plantation in Pawleys Island, S.C. Hocutt opted for a job as a sales manager for a Myrtle Beach, S.C., communications company.

A few months later, he says he doesn't feel even a tinge of regret about leaving Pawleys Plantation, where he was superintendent for almost 10 years. And Hocutt says he's sure he'll never miss the profession, even though he spent 20 years as a superintendent.

"I will not go back into the business," he says. "I don't care if I'm offered $200,000. It's just not worth it."

Kim Heck, director of career development for the GCSAA, says the association doesn't know the main reasons why superintendents ditch the profession for other careers. But she notes that many superintendents who do leave the profession have many career alternatives.

"Our members have discussed and identified about 30 careers that a superintendent is prepared for," Heck says.

It can be assumed, however, that many superintendents leave the profession for the same reasons as Hocutt did. In addition to being on call to his course like a doctor on call to his patients, Hocutt says he was tired of trying to please *everyone* at the course, which proved futile.

"I spent more time doing public relations than growing grass," he says.

Hocutt says turf schools would be wise to teach courses on the politics that often intertwine with growing grass. He says up-and-coming superintendents need to learn people-management and employee-management skills, as well as how to deal with difficult situations with golfers and members.

"Politics is not trained. It's learned," Hocutt says. "I would hate to see a new guy come in to his first job where there are 400 members. He screws up one time, and all the members jump on him. Then he loses his job because he didn't know how to react to the politics. It takes a lot to get over that."

Hocutt says he knows other superintendents who've lost their jobs in the crossfire of turf politics. "When it comes to politics, I've seen too many people let go."

Hocutt predicts more superintendents will get out of the business as the politics and pressures of tending turf continue to mount. He says he's made sales calls to about 100 courses, and about 20 percent of the superintendents from those courses say they would get out of the profession if they had other jobs to go to.

Hocutt admits he misses the good pay that many established superintendents earn. But he quickly notes that he works nine to five and has weekends free.

"I took a huge pay cut," Hocutt says. "But I definitely enjoy life more now, and I sleep better."

– Larry Aylward, Editor

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As in other industries (and maybe a tad more), one has to go where the jobs are. So a big part about employment in the golf course maintenance industry has to do with a person's flexibility to pick up and move, Williams says. For Jennings, it's a good bet there's better opportunity for employment in Scottsdale, Ariz., than around Massillon.

"If he has a ball and chain on him geographically, his opportunities are going to be limited," Williams says.

Even if people like Jennings find jobs close to home, the courses they've joined might not be the best places for them to learn, Williams points out. For instance, someone new to the business isn't going to learn much from a superintendent who's turf nutrition philosophy is to apply fertilizer to the course whether it needs it or not.

"You want to hone your skills with someone who has a good reputation in the industry," Williams says.

That means going to work for someone who knows agronomy like Merrill Lynch knows finance. "Some guys are more in tune agronomically than others," Williams adds.

A person who's new to the industry may also want to jump at the chance to work for a seasoned superintendent who's 60 years old.

"Guess who might get a crack at his job if he retires at 65?" Williams asks rhetorically. "That person shouldn't expect to get the [retiring superintendent's] job. But if he works his tail off, how is he not going to get a chance to prove himself?

The bottleneck

Mitch Tankersley worked in sales and marketing for a Silicon Valley software company for about 10 years before burnout set in and he quit his job. Tankersley then enrolled at a nearby community college and sought a two-year degree in horticulture.

While going to school, the 35-year-old landed a job on the crew at San Jose (Calif.) Country Club in March 2002. "It was a lot of work, but it was the best move I ever made," he says.

Salaries: Up, Up, Up

The good news is that average salaries for superintendents have soared in the past 10 years, according to GCSAA.

1993 – $44,500
1995 – $49,269
1998 – $53,205
2000 – $57,057
2003 – $63,065

It only took Tankersley a little more than a year to be promoted to second assistant at San Jose. He's hoping to become a first assistant even sooner and plans to be a superintendent within five years.

But becoming a superintendent in five years may be difficult if the job market for the top posts doesn't improve. Heck says there's an infusion of experienced assistants but not enough top jobs for all of them.

"It's taking assistants longer to become head superintendents," Heck says. "That's where there's a bottleneck."

That's no surprise to Williams, who says the decline in the number of new course openings explains why there aren't as many superintendent jobs now as there were three years ago.

Watschke says the logjam is more the result of demographics.

"It has to do with what the average age of superintendents is," he says. "The industry went through a period in the 1970s and 1980s when a lot of superintendents retired. Now the average age of superintendents is much less. Because there's a younger general population of superintendents, the turnover rate at the top is slower."

While that may be true, some industry insiders theorize that an oversupply of assistant superintendents could cause many golf course financial decision makers to replace veteran superintendents and their hefty salaries with hungry rookies at half the cost, especially in a period of economic distress.

Heck doesn't deny that such a scenario could unfold, but she doubts it would become a trend. Heck says employers realize it's vital to employ seasoned superintendents to oversee their golf courses.

"So they're willing to pay them what the market will bear," she adds. "That's good news for the profession."

Yes, superintendents with loads of experience and hefty salaries have been let go for frugality's sake. But that happens in a lot of industries, Williams notes. "Too many people think that things like that are unique to the golf industry."

The general rule of thumb is that 55 percent of a golf course's maintenance budget is devoted to payroll, Williams says. So if the budget gets slashed, it usually starts where most of the money is being spent. And if a quality superintendent is let go for financial reasons, the course will suffer in the long run, Williams says. "It's shortsighted thinking."

Speaking of pay, Heck says the average superintendent's salary has increased from $44,500 in 1993 to $63,065 in 2003. She expects the upward trend to continue.

The pay range can vary, though. It depends on type of course, region, a person's experience and other factors. But Watschke notes that superintendents' pay range is comparable to that of the general labor in the United States, where 12 percent to 14 percent of people make $60,000 or more, and up to 6 percent make $100,000 or more.

The right stuff

Despite the golf boom the past 10 years, Heck doesn't believe that people are going into the profession for all the wrong reasons — because it's glamorous and they get to play golf three days a week. She says the GCSAA has spent a lot of time and effort to market the profession to potential students for what

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it is — a splendid and rewarding profession, but not necessarily as glamorous as they might think.

"I believe that the people getting into this profession are coming in with their eyes open fully," Heck says.

Some insiders are also concerned that the industry has too many schools offering turf management programs. Heck says she gets several calls from college representatives who want to implement turf programs in their curriculums. She tells them like it is — that in order to compete with other schools, the turf school wannabes must hire top instructors and be heavily committed to their programs.

If an interested school happens to be 20 miles down the road from a turf university powerhouse like Penn State, Heck says she'll discourage the school from implementing a program.

"We're very frank with them," Heck says. "The association is cognizant of the potential proliferation of programs."

While Williams is also concerned about the growth of schools, he says they've done a better job of presenting the profession for it what it really is. The schools have done that by letting experienced superintendents speak to classes about what their jobs entail.

"I used to hear students say — and they're probably still saying it — that they didn't want to get stuck behind desks," Williams says. "But the reality is, unless you have an office manager, you're going to spend a lot of time behind a desk as a superintendent — perhaps as much as half your time."

In the end, finding a job in the field or taking the next step in the profession to become a superintendent is about a lot of things, including timing and contacts. But most everyone agrees that enthusiasm plays a huge part in defining a career.

Clarke says job prospects will continue to be good for students who are eager to make an impact.

"There are jobs out there for well-qualified students," he adds. "Students who aren't really into it will have a more difficult time finding jobs."

Heck says employers want people who desire to learn, among other things. "They want quick learners and people who can assume more responsibility and add value immediately."

And employers want people, no matter their age, who want to make a difference, Williams says. The industry won't turn its back on a 46-year-old newcomer like Jennings if he's hungry to make an impact.

"There's always plenty of room at the top," Williams says. "If you've got the right attitude, the right work ethic and you really care, there's a place for you in the industry."

Jennings hopes he gets his chance. He pauses when asked how he plans to market himself to get a job. He has the tanned look of a golfer, but retains the rugged appearance of a former steel worker.

"I just need a chance to prove myself," he says softly. "And I need someone that doesn't mind me looking over his shoulder to find out why he's doing this and that.

"I'm hoping I'm in the right place at the right time." ■

How to Climb the Career Ladder

Use your contacts, among other things, Williams says

One might not find a more passionate superintendent than Bruce Williams, certified superintendent of Los Angeles Country Club. Williams isn't just known for tending turf. He can talk turf, too.

Bruce Williams

He's a regular speaker at various conferences and seminars. Williams recently appeared at the Assistant Superintendent Boot Camp in Pacific Grove, Calif., sponsored by Northern California Golf Association, where he gave presentations on "Distinguishing Yourself From Other Job Applicants" and "Tips for Getting Your Next Job."

During the presentations, Williams stressed the importance of using contacts to help locate jobs.

"A lot of us can't get jobs on our own," Williams says. "We get them through other people and connections that we've made."

It's vital to keep your name in front of your contacts and let them know you're looking for work. Williams says it's also OK to drop names – if you're being legit. Williams warns never to embellish a relationship just to make yourself look good.

If you've landed a job interview, Williams suggests you practice how you'll answer questions in a mock interview before the real deal. The dress rehearsal can help immensely.

And during the interview, know how to answer the tough questions. For instance, if you're asked where you want to be in three years, don't answer "as superintendent of Riviera Country Club."

"That may be unrealistic," Williams says. "But you have to have some idea of where you want to be."

If you're talking money, make sure to know your salary expectations and the ability of the employer to pay what you have in mind. "Be careful not to lowball yourself," Williams says.

Also make sure that a potential employer gets the message that you're a team player who strives to get along with everyone. Williams stresses the importance of having strong interpersonal skills, which has nothing to do with growing grass but everything to do with growing relationships.

If you're not working and you're looking for work, make your search a full-time job, Williams says. Have a plan for your search – and get up every morning to pursue that plan.

"There's a tremendous amount of opportunity that goes by everyone of us in this business," Williams says. "The successful people recognize the opportunities and take advantage of them."

– L.A., Editor

Economically Speaking

In October, *Golfdom* blasted into cyberspace to poll superintendents on many issues — most related to the economy. The charts below are based on responses from 301 superintendents. Fifty-one percent of the superintendents are from private courses and 49 percent are from public tracks. We focused mostly on economic issues within the industry because they comprise the single largest topic at hand for golf courses and their superintendents.

What Budget Are You Most Likely to Cut?