

## The State of Your Industry: Inside the Golfdom Report

It's been a rough and tough few years for the golf market. Like many American industries, the golf market was crippled economically after 9/11. Resort courses suffered the most, but so did many private and public courses.

In past *Golfdom* Reports, we reported on these economic woes with anecdotes and statistics. But this year's *Golfdom* Report is different. We're not hearing a lot of hard-luck stories. In fact, the majority of industry people we interviewed and surveyed for the lead story in our report (see opposite page) are upbeat about the golf economy.

In addition to that story, this year's report also features Geoff Shackelford's year in review (page 34). The year started off great, what with Phil Mickelson winning the Masters, Shackelford reports, but ...

On pages 40-44, in a section titled "Up and Down," you can review statistics compiled from our year-end survey. This section also features the year's best quotables.

Rounding out the report on page 46 is a story about diminishing etiquette among players. In the story, we ask superintendents what they can do to help proper etiquette return to golf courses. — Larry Aylward, Editor



# Better Days, But ...

There are signs the golf industry is pulling itself out of the economic doldrums. But the financial slump isn't over yet, experts say

By Larry Aylward, Editor

**I**t's a glorious October day in Pinehurst, N.C., and Matt Massei sits in his office at the famed Pinehurst Resort, where he's director of golf. It's early afternoon, and Massei sounds like he's ready to take a page from Ferris Bueller's book.

"My favorite time of the year in Pinehurst is now," Massei says enthusiastically. "It's cool in the morning, and in the mid-70s during the day with blue skies. It just makes you want to get out there and hit it."

The good news at Pinehurst is that people lined up to "hit it" more this year than in the past few years. Massei estimates golf rounds increased 6 percent to 8 percent in 2004 when compared to 2003. "We had a solid year," he adds. "We saw some nice growth."

Yes, Massei did say "growth." And get this — other golf industry number crunchers from throughout the country also mention the "G" word when asked about their courses' performances in 2004.

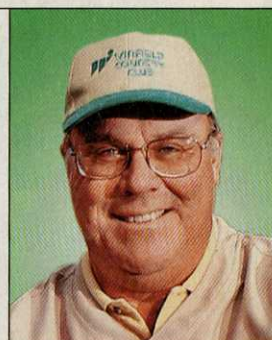
Business at Shenvalee Golf Resort was as brisk as a Burger King at lunchtime, says Charlie Fultz, superintendent of the New Market, Va.-based 27-hole daily-fee and resort facility. Fultz, a member of *Golfdom's* Advisory Staff, reported in October that overall rounds for the year were pushing 60,000, an increase of almost 12 percent. "We're extremely pleased," Fultz says with a spark in his voice.

Last year at this time, Steve Hollembeak, certified superintendent of Winfield (Kan.) Country Club, lamented about the economic troubles his golf course faced as a result of his small town's dismal economy. Winfield's membership had declined dramatically, and Hollembeak had been asked by members to cut his maintenance budget for the third year in a row.

But Hollembeak is upbeat about the course's business a year later. While business didn't get any better in 2004, it didn't get any worse.

"That's a good thing," Hollembeak announces. "It's a sign things are getting better."

Indeed, things *are* getting better, albeit slowly. The National Golf Foundation (NGF) recently reported that rounds in the United States were up 1.3 percent for the first three quarters of the year when compared to the same period in 2003. Golf Datatech, a Florida-based market research firm, estimated that rounds increased 0.4 percent



**Steve Hollembeak** says business didn't get any better in 2004, but it didn't get any worse — and that's a good thing.

*Continued on page 24*



*Continued from page 23*

nationally for the first eight months of the year when compared to last year.

But while business has improved statistically and anecdotally, it's not as good as most owners would like it, says Mike Hughes, executive director of the National Golf Course Owners Association (NGCOA).

"It hasn't rebounded to the levels that it was before we had the downturn," Hughes says. "The best way to describe it is that things are marginally better. It's certainly not going gangbusters like it did in the mid- to late 1990s. Individual play is lagging a bit in some markets. There's

also a lot of price competition in many markets."

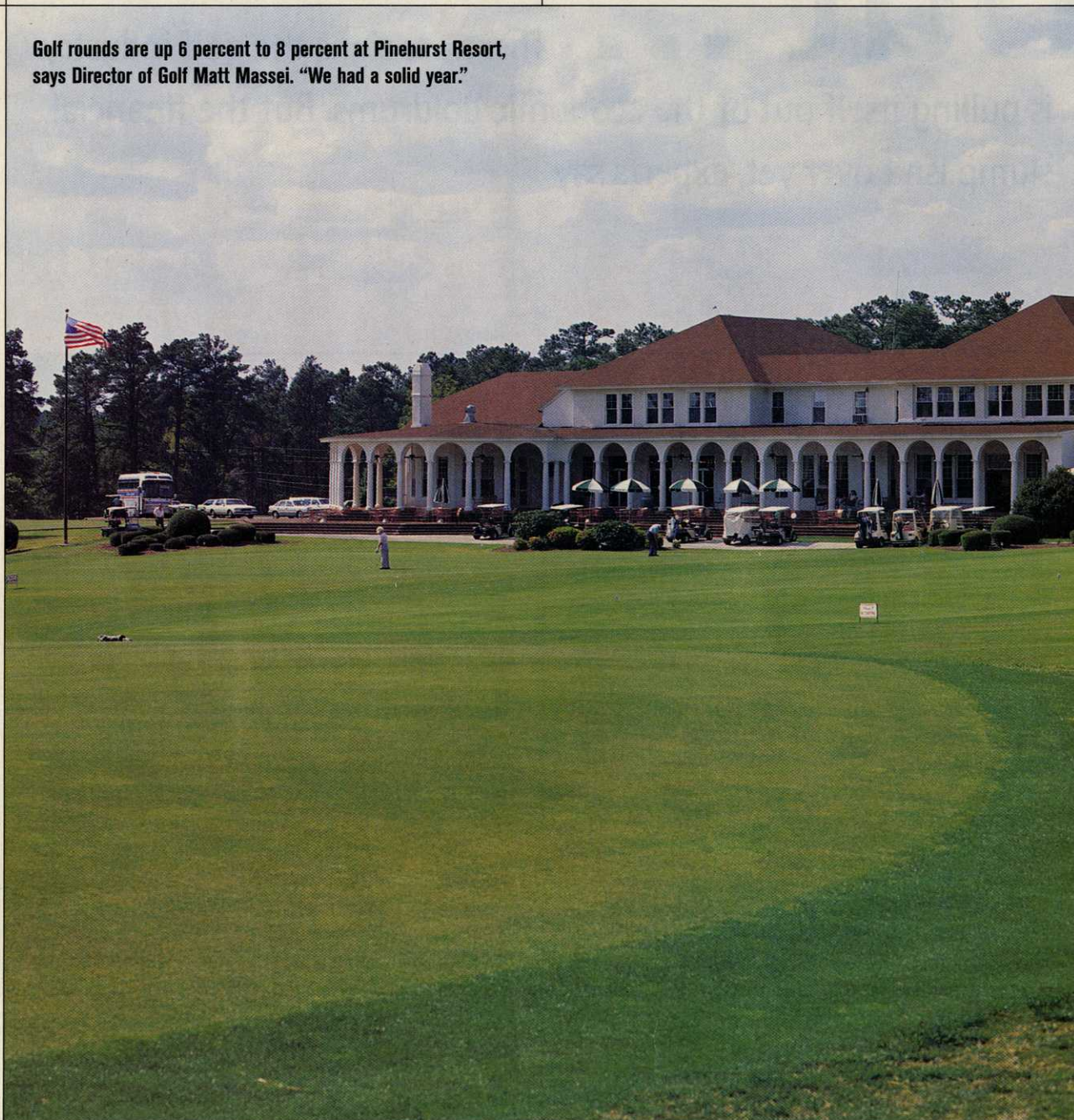
Lee Hetrick, executive director of the Golf Course Builders Association of America, says business was "lean" for the organization's roughly 100 members this year. But that's better than being "really lean" like business was in 2002 and 2003.

"There seems to be enough activity to keep them occupied for the time," Hetrick says, adding that builders are operating at "peak efficiency" and competition is sharp.

The bottom line is that nobody in the golf industry is jumping up and down and acting like they won the World

*Continued on page 26*

**Golf rounds are up 6 percent to 8 percent at Pinehurst Resort, says Director of Golf Matt Massei. "We had a solid year."**



MIKE KLEMM



*Continued from page 24*

Series despite the decent economic news. They remember that yesterday's headlines — "Feeling the Economic Pinch" and "Still Struggling," among others — aren't exactly dated.

## DiPaola: Clear Winners and Losers in Chemical Market

Joseph M. DiPaola, golf market manager of Syngenta Professional Products in Greensboro, N.C., knows all about global warming. He just hasn't experienced the phenomenon first-hand in almost a decade.

"Where was the hot summer?" he asks of 2004. "We haven't really had very hot, humid summer conditions that favor a lot of insects and disease in quite some time. In the heart of the population centers in the United States, you'd probably have to go back to 1995 when that last happened."

Despite the turf-friendly weather patterns, some chemical companies prospered. "From a generalized standpoint, I think there are clear winners and losers, if you will, from a business standpoint in '04," DiPaola says.

As for Syngenta, "we're having a good year," he said in October. "Things got very busy in '04. Good busy. Things seem to be moving at an even faster pace than they used to. I don't know what that's all about, but maybe it's because there's been kind of a turning of the corner in the golf market. Not for everybody, and not everywhere, but in general, the turning of the corner overall."

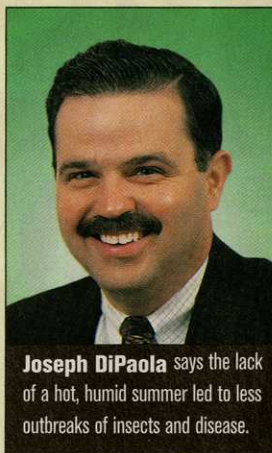
Companies that succeeded did so because of various intangibles, DiPaola says, citing customer service, sales and marketing expertise, and personnel expertise. "All of that makes a difference in the marketplace, and some folks do that better than others," he adds.

Dollar spot remained the top foe for superintendents. "With the cool, wet pattern, particularly in the Midwest and Northeast, dollar spot was once again a very large issue for folks," DiPaola says. "The problem is that it is persistent when the weather pattern stays in that mode for long periods of time. It's a manageable problem, but it's also the No. 1 disease problem for golf turf."

As for 2005, DiPaola says it's difficult to make predictions because technology allows scenarios to change far more quickly than in the past.

"Today if something very positive or negative happens in the marketplace, it's literally hours until 10 or 12 superintendents in the United States are already aware, regardless of where they're located," DiPaola says. "That's a large dynamic in either capturing something positive or dealing with something negative."

— Thomas Skernivitz, Managing Editor



**Joseph DiPaola** says the lack of a hot, humid summer led to less outbreaks of insects and disease.

They also realize that it's wise to answer any how-do-you-think-the-industry-will-perform-in-2005 questions with the guarded phrase, "We're cautiously optimistic."

## Looking back

Hollembeak began his career at Winfield, which opened in 1917, in 1979. "This is the toughest economic time I've seen since my tenure here," he says of the past several years.

Hollembeak's work force has been slashed from eight to four full-time employees the past two years. In 2001 his maintenance budget was a tad under \$300,000. Now it's about \$220,000.

To make matters worse, a new golf course was built in Derby, Kan., about 30 miles from Winfield. "We've lost a few members to the course, but the jury is still out on how it's going to affect our business," Hollembeak says.

Nevertheless, Hollembeak is upbeat about 2005. He says the town's economy has already hit bottom and has nowhere to go but up. "I think we'll gain some numbers," he says of the course's business in 2005.

Hollembeak is not alone in his optimism. According to a recent *Golfdom* online survey of about 350 superintendents, nearly 70 percent of them expect the economy to improve in 2005. About 40 percent of respondents said they were "kind of optimistic" about the economic health of their facilities, and 31 percent said they were "very optimistic."

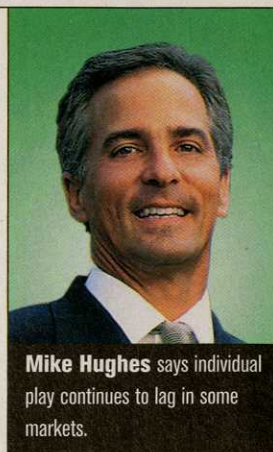
However, 41 percent of respondents said they don't think the golf industry's economic slump is over compared to the 20.5 percent who believe it has ended.

While Pinehurst's Massei is pleased with the resort's growth, he says, "We haven't had a breakthrough year by any stretch of the imagination." He adds that group business has rebounded well, although not to the extent that it was before Sept. 11, 2001.

"But I don't think there's anything we're seeing for that trend not to continue," Massei says of the recovery.

He admits that Pinehurst's upturn in business could be attributed partly to the excitement surrounding the 2005 U.S. Open, which Pinehurst No. 2 hosts in June. But Massei also says competing golf resorts saw a spurt of business this year.

"It's not a marked improvement, but we're out of the trough we were in," he says of resort clubs. "People are more



**Mike Hughes** says individual play continues to lag in some markets.

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*Continued from page 26*

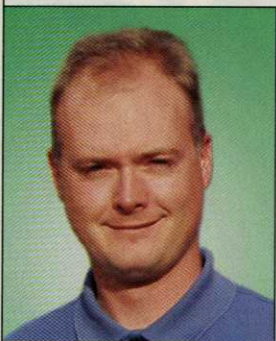
confident to go out and take vacations and spend some of their hard-earned money that they were holding so close to the vest the past two years."

Despite the whopping increase in rounds at Shenvalee, Fultz says resort business still hasn't come back from the numbers it posted before 9/11. Fultz also isn't ready to declare that the golf business is back on its feet. That's because he's heard from other area superintendents that their courses' rounds were flat in 2004.

Rounds at Bunker Hill Golf Course in Brunswick, Ohio, have also been down since 9/11, but not as much as rounds at other courses in the area, says Todd Ingraham, the course's director of golf.

Bunker Hill is doing well because the 18-hole course has adopted a business strategy that focuses on continuous improvement. In the past several years, Bunker Hill, which opened as a nine-hole course in 1927, has added two new holes, renovated its greens, put in cart paths and added a new irrigation system, among other things.

"We're drawing more customers because of the improvements we've made," Ingraham says, noting the course also didn't break the bank to make the improvements. "We've weathered the storm by being the type of business that focuses on constant improvement."



**Todd Ingraham** says Bunker Hill's course improvements led to increased rounds.

### In action

During his address to owners at the NGCOA's annual meeting earlier this year, Hughes urged owners to try and find new means to get more players on their golf courses. Specifically, Hughes says owners must cater to time-starved golfers with programs that fit into their busy schedules.

Hughes says some owners took his message to heart and have implemented such programs with success. "In fact, one owner told me his business was up 15 percent because he made such adjustments at this course," Hughes says.

Ingraham says Bunker Hill implemented an early-bird special this past summer for golfers who wanted to play during the week between 6 a.m. and 8 a.m. Prices were slashed during the time slot from \$36 for 18 holes with a golf car to \$25.

"It doesn't help anybody if the course goes unused," Ingraham says. "We thought if we could sell it at a

*Continued on page 30*

## Naumann: Successful Distributors Got Down and Dirty

When Don Naumann, president of Sierra Pacific Turf Supply in Campbell, Calif., recaps 2004, he uses nitty-gritty action verbs like "hustle" and "scramble." And having seen his independent distributor employees come home sporting a few grass stains over the year, he couldn't be happier knowing they held their own in a dog-eat-dog economy.

"For the most part, after talking with other distributors,

it was a very competitive year," Naumann says. "Volumes were down for a couple of reasons: No. 1, the weather nationwide wasn't what it could have been, so there wasn't as much disease. And there seemed to be a lot of scrambling in the marketplace because a lot of the major distributors were in a state of flux, so a lot of the independent distributors were scrambling after their business."

Sierra Pacific Turf performed well in 2004, Naumann

says, thanks to upbeat fertilizer and chemical sales that offset a "way down" irrigation market attributable to sparse new construction, he adds. "I guess we hustled more," he says. "We didn't take any customer for granted."

As a whole, distributors continued to adapt to ever-tight budgets, Naumann says.

"I would say that sales were slightly up, but profit was way up — not double-digit (up), but it was up," he adds. "And the reason is because people became used to some of these budgets, and they trimmed some of their own overhead, making it a little more efficient."

"Golf is still not growing at the huge rate that we thought," he notes. "So, as a whole, we've learned to be a lot more frugal. I guess we're picking and choosing who we go to."

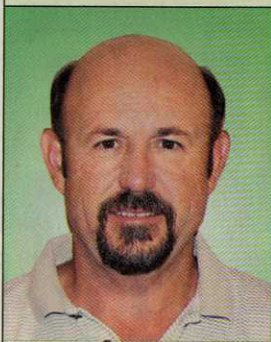
Going into 2005, Naumann says the rising cost of natural gas remains a concern, affecting both the production of fertilizer and the delivery of products.

"Fuel cost is a major increase," Naumann says. "More and more people are charging for delivery. There are no longer free deliveries."

Yet another strategy in reducing costs, Naumann adds, is the prospect of buy-in groups.

"You're going to see more and more buy-in groups getting started to help keep the costs down," he says. "I'm a member of a buy-in group that has been advantageous in helping the profitability of the distributors. As there are buy-in groups with the golf courses, you're seeing more and more of the buy-in groups with distributors, too."

— Thomas Skernivitz, Managing Editor



**Don Naumann** says more buy-in groups will form to help keep costs down.



*Continued from page 28*

discount and encourage people to come out early, we'd still make some money. Some people came early to get in nine or 18 holes before going to work."

## McWhirter: Architects' Optimism Buoy Irrigators

Rod McWhirter, national specification manager for Rain Bird's golf division in Tucson, Ariz., keeps a wary eye on golf course architects. And realizing that's often the best way to gauge the future of the irrigation industry, he likes what he sees as 2004 comes to a close.

"I don't have any predictions (for 2005), but architects seem to be more optimistic and their plates seem to be a little fuller," McWhirter says. "Their pipelines are getting a little fuller than they have been the last three or four years. I don't know how significant, but I see optimism at their level. And that's about all I can go by because they're at the top of the pyramid and that usually filters down to the rest of us."

New golf course construction remained stagnant in 2004, with the National Golf Federation reporting that the year will end with about 150 new courses.

"The new golf course construction business has not picked up much," McWhirter says. "It's still slow compared to the really robust years of the late 1990s."

Once again, that leaves the irrigation industry reliant on the burgeoning renovation market.

"For (Rain Bird) and irrigation companies in general and probably a lot of irrigation contractors, the renovation market is still a high priority for them," McWhirter says. "Year after year, it's going to continue to grow, because all those courses that were built in the '80s are now in the general vicinity of 20 years old and need either updating or total replacement of irrigation systems. That is a growing market, although it slows down, too, when the economy is slow. It's a base that we built early on that is now coming around for renovation and upgrades."

McWhirter says Rain Bird, by necessity, has fine-tuned its approach in the renovation market, offering, for instance, financing programs.

"And I'm sure everyone else has, too. You almost have to," he says. "It's very competitive. When the market retracts and all the same people are still in it that were in it when it was as big as it was throughout the '90s, obviously the competition kicks up a higher notch. And it's been very competitive for everybody — the contractors, the manufacturers, the distributors — which is good for the end-user."

— Thomas Skernivitz, Managing Editor



**Rod McWhirter** says he likes what he sees as the year comes to a close.

Bunker Hill, which was named the 2004 Ohio Course of the Year by NGCOA, also offers a late-day special, which includes nine holes and dinner at the club's sports bar and grill for \$25 a person.

The bottom line for both programs is that golfers can get on and off the course quickly, not to mention the value they receive for their money.

Fultz says Shenvalee slashed daily prices on Mondays, Tuesdays and Wednesdays at the course this summer to attract late-afternoon golfers.

"A lot of people getting off work were looking for deals in the afternoon," Fultz says. "So we offered them an all-the-golf-you-can-play-for-\$25 deal."

The normal green fee is \$50, and the promotion was a hit. The number of late-afternoon golfers more than tripled from 40 to about 130 on those days. By the way, the \$25 green didn't include a golf car so the course made more money off rentals.

Golf course architects also realize they must get time on their sides, says Bobby Weed, president of Weed Golf Course Design in Ponte Vedra Beach, Fla. Weed says more architects are cognizant to design golf courses that play faster.

Cannon Ridge Golf, a new course that Weed designed in Fredericksburg, Va., features greens, cart paths and other elements that were created in unison to speed up play. Weed says statistics show that a round of golf at Cannon Ridge takes less time than the national average.

Everyone agrees that a big plus for the industry has been the return of corporate spending on golf courses. At least one course didn't wait for that business to return, however. Bunker Hill embarked on the offensive to regain lost corporate outing business. The course launched an aggressive marketing effort to regain lost corporate business.

"People would call us in the good ol' days, and we'd just sit back and answer the phone and say, 'Yes, we've got that date open for an outing,'" Ingraham says. "But it's not like that anymore. We're calling them, and asking them what we can do to get them to come back. It's working."

Ingraham also believes the business has remained steady the past few years because of the course's acute focus on customer service. Bunker Hill's employees, from clubhouse workers to the maintenance staff, are instructed to be as courteous to golfers as Wal-Mart greeters are to the store's shoppers.

"We hear all kinds of complements on how nice and friendly our people are," Ingraham says.

## Looking ahead

Hughes is certain that most U.S. regions don't need more golf courses. About 150 new courses were built this year, most driven by real-estate development, Hughes says. The



number pales in comparison to the number of courses built in the mid-1990s, but it's still a lot of new courses for an industry that's been struggling, Hughes says.

"I doubt there are many places that you can say don't have adequate supply," Hughes says. "There might be a few metropolitan pockets, but not many. It doesn't help anybody to have a bunch of struggling golf courses."

Hetrick agrees the industry has reached the saturation point for high-end, daily-fee courses that charge \$150 and take five hours to play. But he believes there are pockets where more affordable golf courses could still be built.

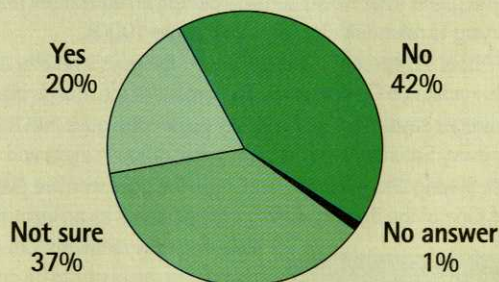
"If you've got the financing, there's never been a better time to build a golf course," Hetrick says. "There are a lot of builders looking for work."

Weed says architects face more competition than ever because of the decline in new courses. "But a lot of the slack is being picked up with renovations," he adds. "I don't see that slowing down. In fact, I see more of it coming."

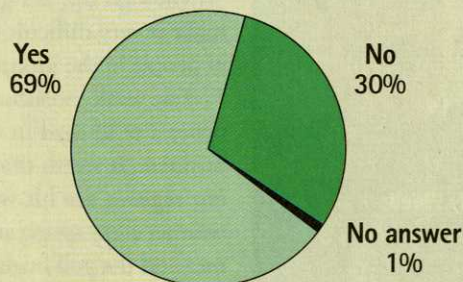
While Weed says real estate will continue to drive some golf course development, he's concerned that some

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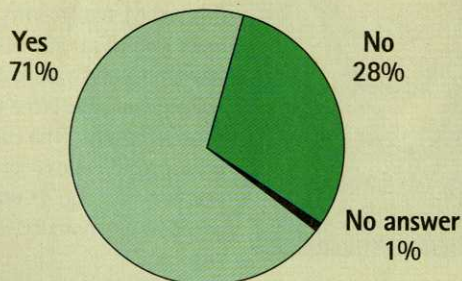
**Many people believe the economic slump in the golf industry is over. Do you agree?**



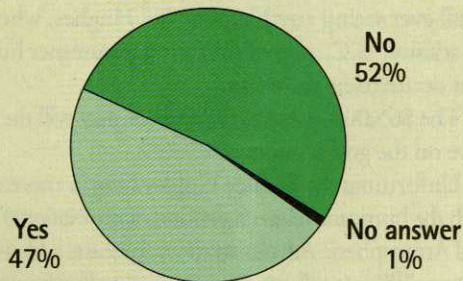
**Do you feel confident the general economy will improve in 2005?**



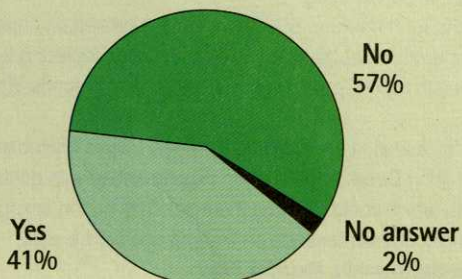
**Has the economy affected your course's revenue?**



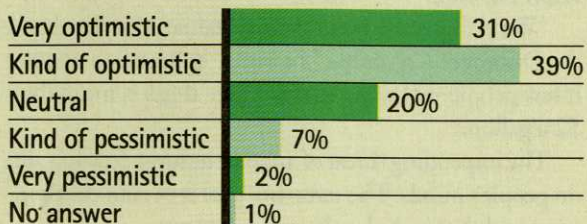
**Was your course damaged or hindered by bad weather in 2004?**



**Did your course's rounds increase this year?**



**How optimistic are you about the economic health of your facility?**



Editor's note: Findings are based on responses from 325 superintendents who participated in *Golfdom's* October online survey.

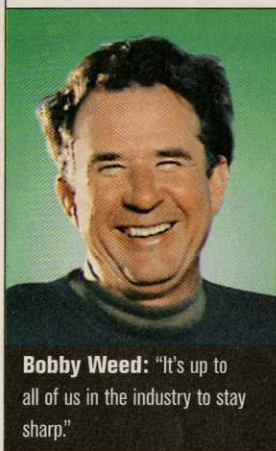


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developers don't care if golf courses aren't profitable as long as they sell real estate around them.

"That thinking has given golf a black eye in some areas," Weed says. "But I think more developers are becoming more frugal and want golf courses to be more of a profit center."

Hughes says he hasn't heard of many golf course closings, although many have changed ownership. But Hughes is worried that rising interest rates could hurt some owners' operations, especially if they're already operating with deficits.



**Bobby Weed:** "It's up to all of us in the industry to stay sharp."

"One of the things that has allowed people to survive in a very difficult environment has been low interest rates," he says. "If they go up, it's going to make it very difficult for a lot of people in the industry."

The wacky weather always poses a wild card in the golf business. It seems that different regions are hit with bad weather every spring and summer and the golf business suffers in those areas. Florida was

a prime example in 2004, and the effect the hurricanes had on golf industry economics in Florida and other Southern states may not be known until early 2005.

"I've lived on the East Coast my whole life, and I don't recall ever seeing anything like it," Hughes, who lives in Charleston, S.C., says of the four late-summer hurricanes that occurred in six weeks.

The \$65,000 question is: What impact will the weather have on the golf economy in 2005?

Unfortunately, Stanley Goldenberg, a meteorologist with the hurricane research division of the National Oceanic and Atmospheric Administration, forecasts a future of bad storms. "We are talking about overall twice the amount of activity and two and a half times the number of major hurricanes," Goldenberg recently told *Engineering News-Record*.

Other questions loom as well. Fultz is worried the escalating price of gas will affect Shenvalee and the entire resort business.

"We pull people from Pennsylvania, Maryland and the District of Columbia," he says. "You have to wonder if less people will want to drive here if gas is more than \$2 a gallon."

The impending threat of another terrorist attack is also on people's minds. The terrorists' goal is to ruin the economy, and that includes the golf economy.

As Weed says, the golf industry is a completely differ-

ent industry than it was four years ago. And if its segments — from architects to owners and superintendents to pros — don't work in unison, the industry could suffer, Weed contends.

"It's up to all of us in the industry to stay sharp," he says. "We're all joined at the hip when it comes to growing the game of golf. The economy of the business continues to change and evolve, and we have to adapt to that." ■

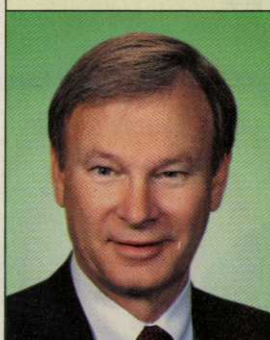
## Schwieger: Iron Majors Seek Strength in Numbers

Dennis Schwieger, executive vice president of marketing and business development for Charlotte, N.C.-based Jacobsen, wishes more guys like him — average golfers — would start playing the game. That would certainly benefit an equipment industry trying to relive the glory days of the late 1990s.

"About 20 percent of the golfers — the guys who play all the time — make up 70 percent to 75 percent of the rounds played," Schwieger says. "And the light-duty guys — the guys that don't play every Saturday — we're the biggest group in there and we're playing altogether no more than the guys who are playing a lot. One of the things we're concerned about as an industry is

attracting new members, but more importantly we ought to be concerned about retaining who we already have."

The iron industry fared somewhat better in 2004 than it had the previous year, Schwieger says. "For cutting and grooming equipment, I would say that business was slightly improved, but it's nothing like it was in the past decade," he says. "The compound annual growth rate is not what it was five years ago. It's dramatically down from what it was five years ago."



**Dennis Schwieger** says the golf industry must focus more on retaining the players it already has.

Competition is good ... and hopefully getting better and more amicable, Schwieger says. He advocates the decision to incorporate several trade associations into the 2005 Golf Industry Show. "That's a really positive thing," he says. "Somewhere along the line we have to have cooperation through associations and that sort of thing."

As for the future, Schwieger sees improved technology — from environmentally friendly electric drives replacing hydraulic drives to robotic equipment that can groom courses after nightfall.

"I think all of us — at least the three majors (Jacobsen, Toro, and John Deere) — have been experimenting with guidance systems, which could give you more flexibility on the timing of when you can do maintenance on the golf course," he says.

— Thomas Skernivitz, Managing Editor



# Time for an Annual Review

It started off great, what with Phil winning the Masters.  
But things started to get ugly around U.S. Open time

By Geoff Shackelford, Contributing Editor

**I**t started off so promising. There was an exciting West Coast swing and an increase in spring rounds played.

There was Phil Mickelson's brilliant Masters win on a retro Sunday in Augusta, followed by a stellar leader board heading into U.S. Open weekend.

Then the USGA lost its mind and lost control of Shinnecock Hills, and in the second half of the year golf seemed to serve as a constant reminder of the many issues facing the game on both the professional and recreational levels.

Actually, the stitches began to come undone the week prior to the Open. The pain had to do with slow golf. At the Buick-sponsored tour event formerly known as the Westchester Classic, twosomes took five hours to play Saturday's third round. The tour's finest waited for upwards of 20 minutes on tees as most of the field attempted to drive two short par-4s. The course's two par 5s were also reachable in two for most of the field and added to congestion problems. It all prompted a grumpy Fred Couples to say, "I wouldn't have come out and watched today. You might as well have stayed home."

The worst-kept secret in golf is that slow play is undermining the sport's popularity like never before. Golf courses that host the top players and even everyday layouts designed with certain driving distances in mind have become out-

*Continued on page 36*



MEDIOMAGES/TOM JOHNSON



*Continued from page 34*

dated. The result? Lots of waiting. Why the waiting? Because people are hitting it longer. Even everyday golfers are starting to see genuine benefits from equipment, thanks in part to the use of launch-monitor club-fitting technology.

The real eye-opener at the Buick event came from PGA Tour official Slugger White, who probably was reprimanded for concluding after the round that the slow play was caused by extreme driving distances. "We've got a situation now where I really feel like the ball is going too far," he said. "We've got guys driving the ball farther than they ever have."

The year saw many in golf coming to grips with the notion that golf manufacturers have little interest in the everyday game. More prominent golfers and officials joined the chorus of traditionalists calling upon the governing bodies to regulate distance to preserve vital traditions and ensure a healthy future for the sport.

Among those in 2004 suggesting a rollback in distance or a "tournament ball" to end the madness of lengthening and narrowing courses were Arnold Palmer, Jack Nicklaus, Gary Player, Nick Price, Tom Weiskopf, Deane Beman and Tiger Woods.

Yes, that's right, Tiger tried to bring up the issue, first in a press conference and a week later on the ABC prime-time telecast of "Battle of the Bridges." Yet golf magazines mysteriously did not report on his rather startling and simple solution.

"I think you should put a limit on the speed of a golf ball, the spin rate of a golf ball," Woods said in comments obviously choreographed with his biggest sponsor, Nike. "You can increase the spin of the golf ball and make it so that we don't hit the ball as far. You can decrease the speed of the core. There are different ways you can get around it so that we're all playing under certain speed limits. Hopefully that will be the answer to a lot of the problems that we're having with golf course design around the world."

At public courses and country clubs across the land, superintendents reported increasing pressure to deal with the distance issue. The Golf Course Superintendent Association of America's (GCSAA) annual survey found that 28 percent of superintendents polled said "maintenance of their course changed to compensate for the increasing distance of golf balls." That's up 10 percent from 2003.

Many superintendents reported anecdotal evidence of



GEOFF SHACKELFORD

**The green of the par-3 seventh hole at Shinnecock was as slick as an ice-skating rink during the U.S. Open.**

increased driving distance by more golfers. They said that some places accustomed to parking golf cars while waiting for other groups to tee off were no longer safe. They also said that tees once out of reach from parallel fairways are now design issues in need of analysis (and protective fencing).

The list of unfortunate symptoms related to the distance chase is long, but the saddest continues to be the lack of attention paid to the significant upgrade in course maintenance across the United States compared to a decade ago. Sure, a few courses are still not in great shape and many are cutting back on basics such as bunker raking, but, by and large, maintenance has never been better.

### **Where are the watchdogs?**

The good news for the struggling golf business is that several prominent voices have taken notice of the connection between distance, cost and the overall commercial atmosphere driven by manufacturers. They have made the connection and understand how the situation is scaring off long-time and beginning players.

"You can be anti-technology when it comes to golf, without being one of those uncompromising purists who thinks we should go back to hickory shafts," wrote *Washington Post* columnist Sally Jenkins. "Which of us doesn't long for the days when a par 4 was supposed to be played ... in four strokes?"

"The real problem with golf is not science itself, but that it's been applied to the game so rampantly by equipment

*Continued on page 38*



*Continued from page 36*

companies interested only in selling the 'newest' clubs and balls for even higher prices. They don't care if Augusta is stretched to the point of ruin, or if a 480-yard hole has to be turned into a par 4. They just want to move product. In no other sport are the equipment manufacturers so influential when it comes to how the game is played. Spalding and Nike don't control basketball. But the equipment companies in golf have enormous sway via advertising and sponsorship dollars, and they are the chief obstacle to reform."

On the reform front, the governing bodies continued to run scared this year. The Royal and Ancient Golf Club of St. Andrews made clear it has no intention of doing anything. The USGA rolled out a new Phase II ball test, and PGA Tour driving distances did not decrease. (You must go down to 89th place in the driving distance stats to find someone *averaging* under 290 yards off the tee!)

The PGA Tour is too worried about its upcoming television contract negotiations to step into the battle. While the other assorted bodies wheel out fog-filtered ads about all that they're doing to grow the game, it has become apparent there isn't much point to introducing a poor inner-city child to the game if it's going to cost nearly \$1,000 for a starter set of clubs.

Yes, that's right, Nike unveiled a starter set that cost \$897 — and bragged about it in a press release. Taylor Made unveiled a \$799 driver. Meanwhile, Callaway began a nose-dive that saw Wall Street dumping its stock, while ball giant Titleist continued to rake in the profits and rail against any form of regulation that might restore some sanity to the sport.

"The concomitant pressure to innovate faster and faster, repeatedly recapturing the consumer imagination while not angering buyers with computer industry-style speedy obsolescence, makes golf one of the most difficult subsegments in the leisure products market," wrote Golf Channel equipment editor Adam Barr. "And faster (read: more expensive) innovation leads to more late-model closeouts and — you guessed it — more downward price pressure."

Translation: The golf equipment industry is moving from the already insidious Wall Street-driven concept of "planned obsolescence" (they don't make 'em like they used to) to a cycle that calls on rapid innovation and flashy marketing designed to make golfers feel as if they're using obsolete equipment if they haven't picked up this month's newest drivers.



MIKE KLEMM

**Whistling Straits, site of the 2004 PGA Championship, ranked high on *Golf Digest's* Top 100 Courses You Can Play list.**

Here's the kicker (and reason to not own Callaway stock): The cycles are moving so fast that the companies are no longer able to exploit the suggested retail price long enough to produce expected earnings. The dwindling number of golfers combined with less enthusiasm from avid players to constantly buy the latest clubs produces plenty of surplus and weak profit margins for the manufacturers.

### Winners are ...

On the architecture front, *Golf Digest's* Best New Course competition continued to generate plenty of buzz. Jim Engh's The Club at Black Rock in Coeur d'Alene, Idaho, upset two courses almost surely destined for Top 100 lists: Tom Fazio's Dallas National and Bill Coore-Ben Crenshaw's Friars Head on Long Island. Tom Weiskopf's Forest Dunes earned the Best New Resort Course Award while Baxter Spann's Black Mesa in New Mexico took the Best New Affordable Award.

Speaking of affordable golf, *Golf Magazine* unveiled its list of the Top 100 Courses You Can Play. Average in-season green fee: \$191. Perhaps feeling guilty, the magazine thankfully offered up a new list, the Nifty 50 courses under \$50 that are worth playing.

The year ended up with Vijay Singh establishing himself as the best golfer in the world, the American Ryder Cup putting on a dreadful performance at immaculate Oakland Hills, but an overall sense that Americans are finally taking notice of key issues that face what is still a great sport and a fine business in which to be part. ■

*Shackelford can be reached at [geoffshackelford@aol.com](mailto:geoffshackelford@aol.com).*

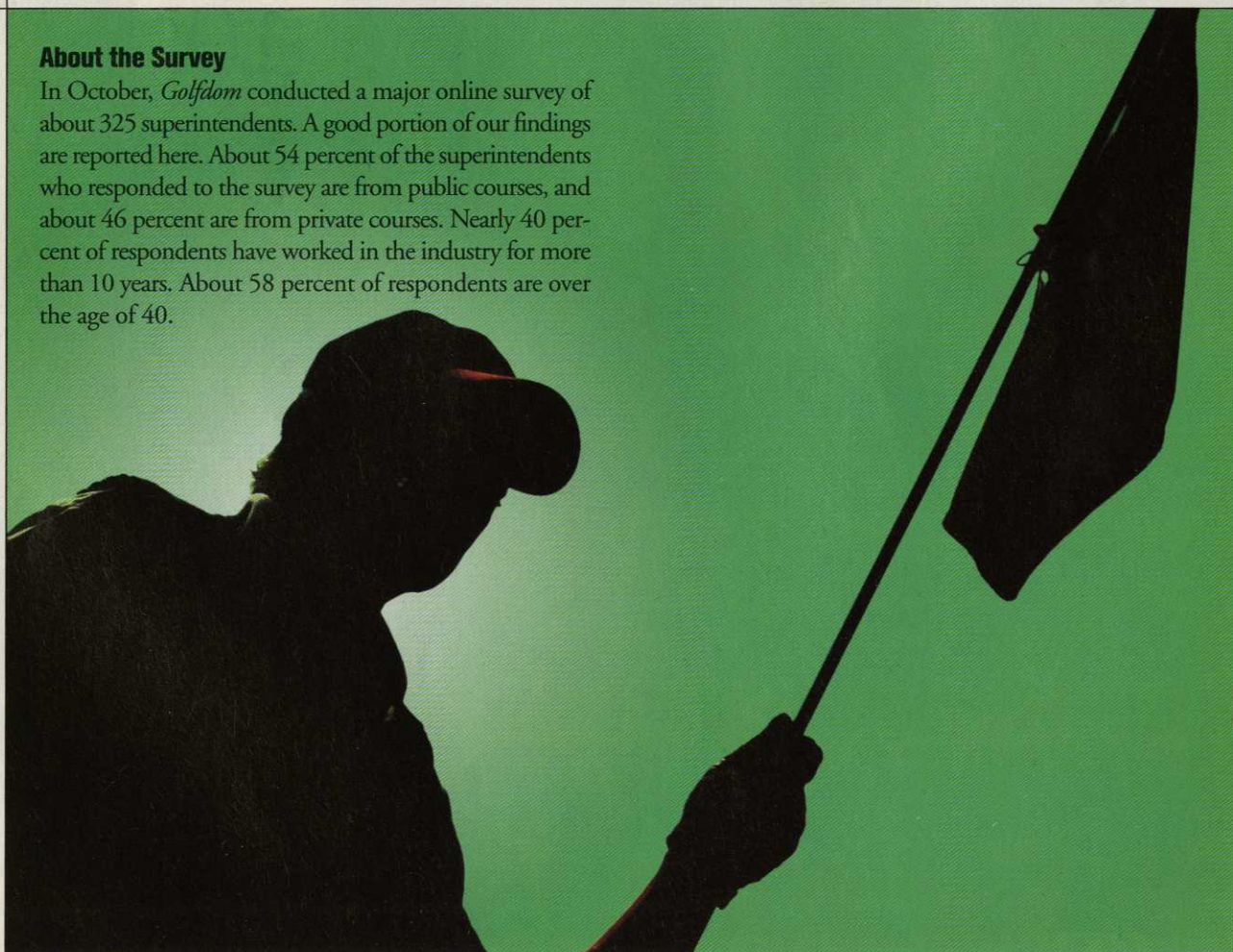


# Up and Down

A look back at the year in statistics and sayings, including results of our recent superintendent survey and the best quotables of the year from some of the industry's most interesting characters

## About the Survey

In October, *Golfdom* conducted a major online survey of about 325 superintendents. A good portion of our findings are reported here. About 54 percent of the superintendents who responded to the survey are from public courses, and about 46 percent are from private courses. Nearly 40 percent of respondents have worked in the industry for more than 10 years. About 58 percent of respondents are over the age of 40.





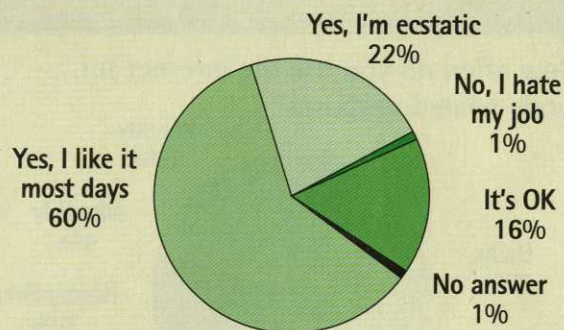
**“** We lost part of the roof on the maintenance building. I now have a ‘skylight’ in my office.”

– **Joe Boe**, superintendent of Coral Oaks Golf Course in Cape Coral, Fla., after his course took a hit from Hurricane Charley.

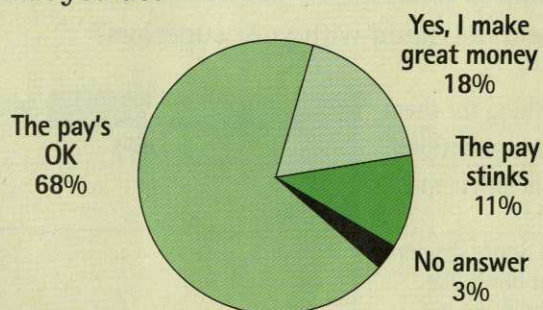


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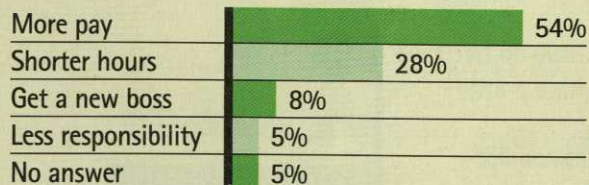
Are you happy in your current position?



Do you think you're adequately paid for what you do?



If there's one thing you could change about your job, what would it be?



Editor's note: Findings are based on responses from 325 superintendents who participated in *Golfdom's* October online survey.

**“** It's indescribable to win this award. I feel like I could die now since there's nothing in my profession better than this.”

– **Monroe S. Miller**, superintendent at Blackhawk Country Club in Madison, Wis., reacting to receiving the USGA Green Section Award.

**“** Don't make any cracks about our accents. Remember, we're the ones speaking English, and you're the ones with the accents.”

– **Stephen Bernhard**, president of the British company Bernhard and Co., which makes mower-sharpening machines, talking to members of the American press at the GCSAA Conference and Show.

**“** Agronomics, economics and politics are part of every decision you make.”

– **Bob Brame**, a USGA Green Section agronomist, speaking to superintendents during his “Year in Review” presentation at the 2003 Ohio Turfgrass Conference & Show.

**“** People want fast greens, but they want greens to hold. Yeah, and I want an SUV that gets 30 miles to a gallon.”

– **Ron Ross**, certified superintendent of Quarry Oaks Golf Club in Ashland, Neb., on the green-speed issue.

*Continued on page 44*



MEDIOWAGES



Continued from page 43

“Most of the pesticides we use today are safer than aspirin. I’m not talking about 20 years ago, I’m talking about today. I’m not talking about all of them, I’m talking about most of them.”

– **Tim Hiers**, certified superintendent of the Old Collier Golf Club.



MARY CORCORAN

“I think there’s a lot of internal strife in the USGA. One person wants one thing, another person wants another. They duck and hide until they go on TV, when they say everything is fine.”

– **Frank Hannigan**, former USGA executive director, on the controversy surrounding the course setup at last month’s U.S. Open, held at Shinnecock Hills Golf Club (*Newsday*).

“You’d like to think you could be somewhere forever in this business, but I think it’s almost next to impossible.”

– **Mark Kuhns**, certified superintendent of Baltusrol Golf Club, on staying at one club for an extended period.

“If I watch the old Masters from the 1960s and ’70s, I almost start laughing. You see guys on the ninth green at Augusta actually hitting the putt down the hill and the ball stops short.”

– **Bill Kernan**, senior project designer for Hurdzan/Fry Golf Course Design in Columbus, Ohio, on the evolution of green speed.

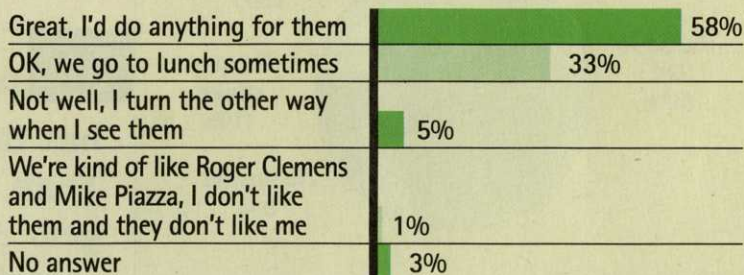
“His influences on the game, and especially among minorities ... if he wasn’t as persistent and as stubborn as he has been his entire life and his career, players like me may not have had a chance to play on the Tour.”

– **Tiger Woods**, on Charlie Sifford, the first black chosen in the World Golf Hall of Fame. (*The Wire*) ■

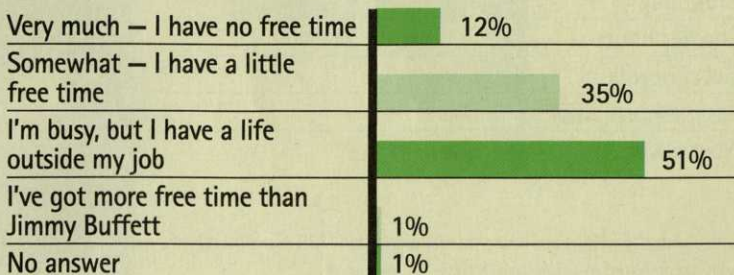
How often do you use the Internet for work-related purposes?



How well do you get along with your superiors?



Do the hours you work impact your life outside the golf course?





# Manners Matter

Proper etiquette among players has diminished on the golf course. What can superintendents do to help it return?

By Brian H. Kehrl

**W**e all know it. We see it in the lengthy disgruntled lines and the dawdling six-hour rounds at public courses on Saturday mornings, and in the packed year-round reservations at private and resort clubs. We see it in the dusty jeans that a player wears to the course on Thursday afternoon, coming straight from the carpentry shop to the clubhouse with a six-pack in his hand. Even Martha Burke tried to tell the world: Golf is changing. Well, the sport isn't changing, but the people who play it are.

"Now people play for more than the sake of playing," says Ron Ross, certified superintendent of Quarry Oaks Golf Club, a public course in Ashland, Neb. "It's good to get away for a little, it's for male bonding, it's for a tournament with work, it's because their buddies asked them to play. It's not just because they love the game anymore."

The good news is that more people are excited about and interested in golf, bringing a host of new golfers and golf courses and ushering the game to its proper setting on the national sporting stage. The bad news is that more and more people are playing who haven't played much before.

These are golfers who didn't grow up playing the game, and didn't have their fathers, grandfathers or the resident

*Continued on page 48*



DIGITAL STOCK/TOM JOHNSON



*Continued from page 46*

sticklers hanging around the clubhouse, harping on them about the importance of taking care of the courses. They are golfers who weren't caddies as teenagers, and didn't learn to rake bunkers for the next guy, or to tread lightly on and around the greens. Put simply, these are players who don't know the rules — either the sporting regulations or the even more esoteric but equally important rules of etiquette.

So what about etiquette? With all these new, unschooled players, has it taken a hit? Was it ever there in the first place? Is it long gone, or is it maybe just hiding deep in the rough while waiting to be forcefully rediscovered by some fed-up course superintendents?

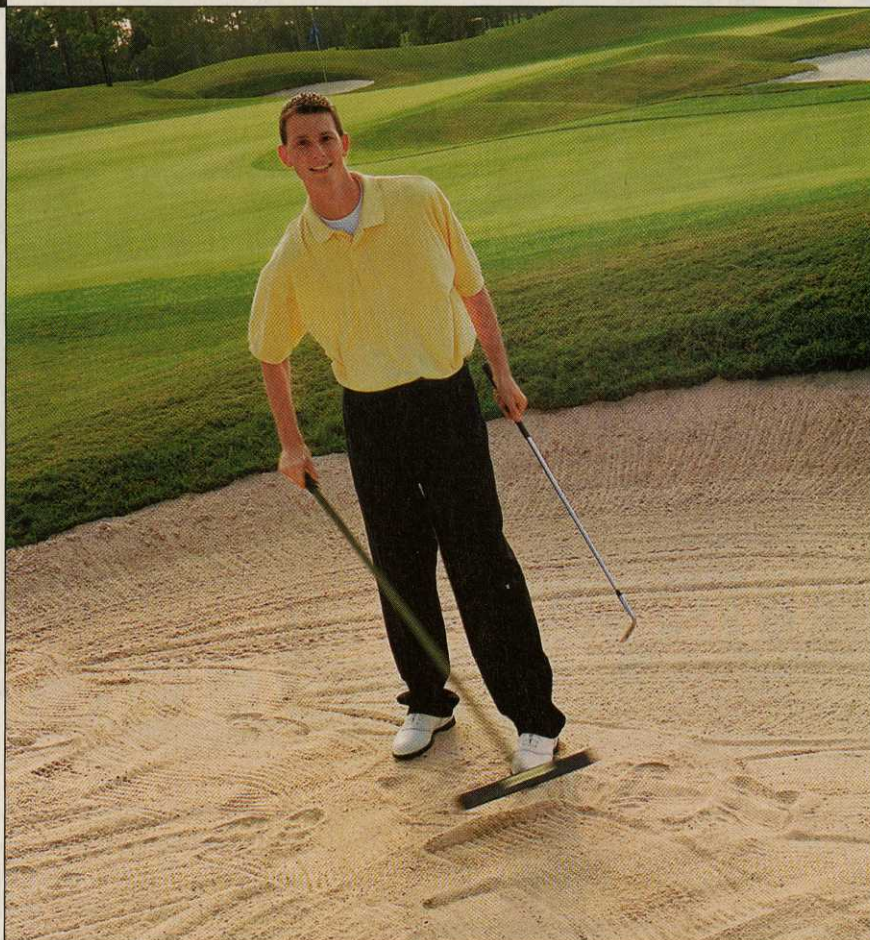
If it's on the ebb, what can you as superintendents do about the golf car tracks across the edge of the green, the hefty footprints right across the cup, the day-old dead brown ball marks, or the occasional 3-inch cavity in the green from an aggravated, unruly putter? Can anything be done to stop this carnage?

### Defining etiquette

There's a wide spectrum of understanding of what exactly etiquette is: from general course maintenance during play, to keeping an appropriate pace, to courtesies such as tending the pin, to knowing the regulations and penalties for errant shots. The PGA provides a comprehensive list of the rules, starting with allowing yourself time to warm up at the start of a round, all the way to shaking hands after the last putt. A more straightforward working definition, though, eloquently summed up by Ross, "is just having good manners on the golf course and doing things in the proper way. And that means being patient and considerate of others and taking the time to fix the things that you mess up."

However general or specific of a definition you receive in asking several superintendents about their takes on etiquette, one thing seems sure: Many new players don't know the rules of etiquette, or often times, even that such rules exist.

"A lot of that has to do with the boom over the last five to 10 years," says Eric Johnson, superintendent at Bandon Dunes Golf Resort in Bandon, Ore. "The new players



PHOTO/ISC

### Re-education programs might be the best option to train golfers about the rules of etiquette, including bunker raking.

just don't have the respect that you learned a few years ago. They come out and expect this game to be easy and simple, and they have no idea what they're getting into."

The booming popularity of the game has tapped a new slice of the population. Tiger Woods' fame and national recognition has furthered golf's reach to a new and previously uncultivated audience. Plus, the increased number of courses across the country has driven down the price of many green fees, and lower-income players who previously couldn't afford to play much are flocking to the game like geese to a pond.

"With so many new golfers playing, especially lower-income golfers who don't know the game except what they see on TV, more people are coming out who don't know how things are supposed to work," says Charles DeCerce, superintendent at Mechanicville (N.Y.) Country Club in upstate New York. They don't see caddies fixing ball marks or raking traps on television, he says, and they don't see any of the work that goes into getting a course ready for a big tournament.

This is not to say that everyone who has played the

*Continued on page 50*



*Continued from page 48*

game for a few years is playing straight from the USGA handbook, nor that all rookies can't tell a divot tool from a tuning fork. Len Berg, the head agronomist for Chicago's six park district courses and a 33-year professional in the business, says that course manners are as uncouth as they've always been.

"Etiquette hasn't changed one iota," he says. "[Golfers] still trash the course, they still don't rake the traps, they still don't fix their ball marks — they still don't do any of the things we ask them to do."

As to the player who still manages to be considerate: "Hooray," Ross says, "because right now he is the stranger. He is the exception."

The consensus seems to be, whether it's a recent occurrence or one that's had 33 years to lay its wicked roots down deep, that etiquette is not what it should be. There are some golfers who don't learn it at all, and some who just don't pay attention to what they have learned.

In most cases, Berg says, the lack of etiquette is not an intentional slight to the game, the course or to the crew working on it.

"The players I know have a lot of class and a lot of respect for the game," he says. "[Some players] even think they actually have good etiquette. But if everybody's doing it, and they say they do, then why are there so many divots and ball marks everywhere? It's forgetfulness. They get out of the habit and it escapes their mind."

### Don't give up

It's doesn't mean etiquette is a lost cause just because some players have forgotten or never learned the rules. Despite his otherwise unenthusiastic outlook on today's etiquette, Berg says that it's not too large a hazard to overcome.

"We cannot give up on this, on the education," he says. "It's too important for our courses and for our game."

But with so much on the line, what can be done to curb the scourge?

With the roots of the problem in forgetfulness and unawareness, player re-education programs might be the best option. Beyond the simple signage that most courses employ to remind their players to "Keep Golf Cars Off Greens," and beyond just posting some rules in the locker room, it should be nothing short of a vertical, concerted effort.



PHOTO/ISC

**The key point to make with golfers is: The more they take care of the course, the better it will look and play.**

It should be a unified front involving the PGA Tour, retail stores, rental shops, pro shops and even the rangers. And they all need to repeat the message that players' behavior on the course does matter, and that it reflects on them and the course itself. "A little bit of education and better understanding will do a lot to bring things around," DeCerce says.

The key is to remind players about proper etiquette without nagging them or being obnoxious, says John Zimmers, the certified superintendent at Oakmont Country Club in Pittsburgh. You have to make the point that the more they take care of a course, the better it will look and play — what with smoother greens, fewer obstacles in the fairway and better tee boxes.

Another way to get the message across to some players, both old and new, is to establish friendly relationships with them. Then they might put a face and a name to golf course maintenance, especially when it comes to maintenance items directly related to etiquette. "When they get to know the superintendent and the staff, they seem to get a little better [with etiquette]," Berg says.

It's not worth it to get all worked up over etiquette, though, Ross says. It's true that it's important, but he also points out the importance of remembering that "it's not all doom and gloom out there."

"Things maybe aren't so bad," Ross says. "I'll gladly put up with any sort of etiquette [problems], as long as I'm out there at sunrise every morning, doing what I love to do." ■

*Kehrl is a freelance writer from Chicago.*