

Respectable

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

Nobody is jumping up and down like they won the Masters, but the people who work in the golf industry – from superintendents to owners to general managers – are slowly regaining confidence in their industry as it regains its economic strength.

Last year we reported there were signs the golf industry was pulling itself out of the economic doldrums. This year we report in our lead story, which begins on the opposite page, that the signs are genuine and that the industry is rebounding from the economic demise of the early 2000s.

This year's *Golfdom Report* also includes Geoff Shackelford's year in review (page 34). Shackelford reports on the good, the bad and the ugly of 2005.

On pages 40-42, 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 44, superintendent Ron Furlong writes about the benefits that brown turf can bring to the golf course. Happy reading.

Showing

The golf industry continues to inch its way out of the economic doldrums

BY LARRY AYLWARD, EDITOR IN CHIEF

When Mike Hughes hears that rounds at U.S. golf courses are as flat as a flounder, he doesn't feel an angry urge to fling his five-iron in a pond. While flat may seem ho-hum, it's a decent performance considering the bumpy times the golf industry has endured this decade.

"I think it's a reasonable result considering the state of the industry for the last couple of years," says Hughes, the executive director of the National Golf Course Owners Association. "Having talked to a lot of owners, rounds are down but revenues are holding even or slightly ahead. So from a revenue standpoint, the business is certainly better than it was a couple of years ago."

Others in the golf industry share Hughes' assessment, including Jim Thompson, the general manager of Angels Crossing Golf Course in Vicksburg, Mich., who says flat is just fine by him.

"I'd say that's a heckuva good showing," Thompson adds.

They are satisfied, perhaps, because they know the industry continues to inch forward with economic improvement after taking its hits in the late 1990s and early 2000s. The industry's wheels weren't coming off then, but they sure were wobbly. An unfavorable combination of too many golf courses, not enough golfers and a struggling economy led to some tough years. So the slightest decrease in rounds this year — minus six-tenths of a percent through September, according to the National Golf Foundation — is not bad news, especially on the heels of a 1.4 increase in rounds in 2004. Throw in the fact that retail sales of balls, clubs, bags and other hard goods rose in 2005 when compared to 2004 and 2003,

Continued on page 28

Apocalypse Now? Industry Prevails Despite Disasters

The world experienced calamity on a grand scale in 2005. Nature displayed its ferocious side, unfurling a fury of disasters, including hurricanes, which caused widespread damage and destruction of a major U.S. city.

While the hurricanes, most notably Katrina, damaged several golf courses in the South, the losses in rounds and revenue didn't impact the industry negatively, especially on the Gulf Coast, says Tom Stine, co-founder of Golf Datatech, a Kissimmee, Fla.-based golf market research firm.

"I know golf is important to the people [on the Gulf Coast] and for some it is their lives . . . but there isn't a huge enough number of rounds of golf being played there by a huge population," Stine says.

Armchair economists said destruction caused by the hurricanes also would filter down and affect many U.S. consumers' pocketbooks, causing them to pay more for gas, food and other necessities. That happened, but has it also caused those people to cut expenses in other areas, such as money spent on entertainment and playing golf?

Mike Hughes, executive director of the National Golf Course Owners Association (NGCOA), says it's the media's nature to report about a world in turmoil and how it could hurt economic development. "But I don't think that's affecting the golf industry negatively," he adds.

Hughes says an improved economy is a sign that things may not be as bad as they seem. He may have a point. The country's economic growth was 3.8 percent in the third quarter, according to the Commerce Department, despite all the bad news.

Stine agrees that there are a lot of bad things going on in the world that affect consumers' spending habits.

"But when is that not the case?" he asks.

— Larry Aylward

Continued from page 27

according to Kissimmee, Fla.-based golf market research firm Golf Datatech, and there's reason for people to feel even more upbeat about the state of their industry.

While *Golfdom's* readers are confident about their respective businesses, they seem unsure of what the future holds for the general economy, according to a recent online survey of 380 superintendents and other golf industry personnel. Sixty-eight percent of readers said they are "very optimistic" or "kind of optimistic" about the economic health of their facilities compared to 11 percent that are "very pessimistic" or "kind of pessimistic." (Twenty percent said they are neutral.) But only 33 percent of readers said they expect the general economy to improve in 2006, compared to 35 percent who said they don't expect the economy to improve, and 32 percent who said they are unsure if it will improve.

Fact is, the U.S. economy is improving — growth was 3.8 percent in the third quarter, which reflects vigorous consumer spending — despite a decline in consumer confidence. Hughes believes the improving economy will spur more rounds and revenue next year.

"If the economy is healthy and growing and people feel secure in their jobs, then they have discretionary income and they'll spend it," Hughes says.

People spent their discretionary income at Angel's Crossing this year. The course, which opened in 2004, did more than 25,000 rounds. Thompson expected it to do about 17,500 rounds.

Thompson says Angels Crossing has helped its own

Summer Heat Keeps Fungicide Makers Busy

By Thomas Skernivitz, Managing Editor

The sweltering summer east of the Mississippi River prompted plenty of speed dialing between superintendent and chemical company in 2005.

"Our phone rang off the hook," says Joe DiPaola, the golf market manager for Syngenta Professional Products.

The hot topic was the hottest season in the Midwest and Northeast

since 1995. Philadelphia, in the 90 days preceding Labor Day, experienced 62 days of above-normal temperatures. The thermome-

FOCUS ON: CHEMICALS

ter in Cleveland touched 90 degrees Fahrenheit 25 days, well above the average of eight.

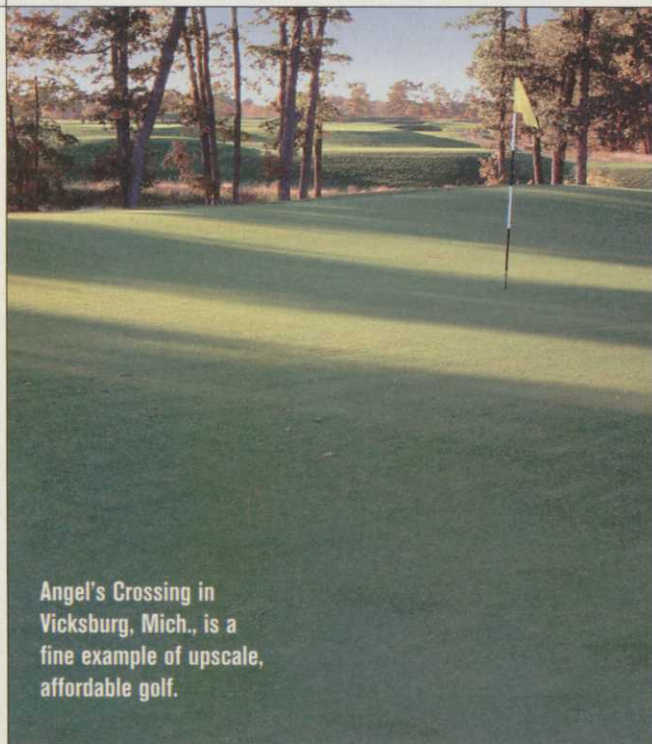
"Some folks, even as late as mid-October, were saying, 'Summer just won't let me go this year,'" DiPaola says.

Turf disease loved it. Spring marked the arrival of snow mold. Then came brown patch, gray leaf spot, anthracnose and take-all patch. Worst of all, pythium resurfaced because of the heat and humidity after laying low the previous mild summers.

"For those courses that were hot and wet, there was only so much you could do about pythium," DiPaola says.

Courses "clearly increased" their expenditures on pest control products, particularly fungicides, DiPaola says. But many superintendents — at an average age of 40 and with an average tenure of six years at their current course — never knew what hit them until it was too late.

"If this was the toughest summer in 10 years, that means that most superintendents had never experienced a tough summer on the course that they're now at. And many superintendents, because of their young ages, would not have experienced one at all," DiPaola says. "That added angst to the whole situation."



Angel's Crossing in Vicksburg, Mich., is a fine example of upscale, affordable golf.

cause by providing upscale, affordable golf. The Bruce Matthews design, which cost less than \$2 million to build, has an 18-hole green fee of \$44 (with golf car) on the weekend. Thompson, a former accountant, believes Angels Crossing is a fine example of how golf courses should be built today.

"If you're going to survive in the next 20 years, you're going to have to do what we've done," he says. "Because if you're not doing it, somebody is going to come back in your backyard and do it."

The industry has its share of critics who charge that golf is too expensive and that some high-end public courses have driven themselves out of the market because of their expensive \$125-plus green fees. There just isn't a good supply of golfers to afford those prices.

So in order to justify a high green fee of \$100 or more, courses had better have a solid name brand attached to their designs or offer something extraordinary with their golf experiences, Hughes says. Otherwise, the price pressures created by supply and demand are going to squeeze them.

Exacerbating the situation even more was tournament preparation. With luminaries headed to the first tee, some courses elected to close for weeks at a time while trying to eradicate a disease or remedy its effects.

"In some cases, they just didn't want to take the gamble," DiPaola says. "You can only do so much sometimes. And those courses that went unscathed were a combination of very, very good and very lucky."

Few courses went the cheap route at the expense of the turf. This upheld Syngenta's market research that had indicated that superintendents, if pressed, would exceed their pesticide budgets between 10 percent and 20 percent. In turn, courses saved some money on fuel costs because the heat suppressed the need to mow as often.

Despite the rush on fungicide, at no time was there a shortage involving the product, DiPaola says. "Because the summers had been mild preceding this, there was a fair level of inventory on hand," he adds.

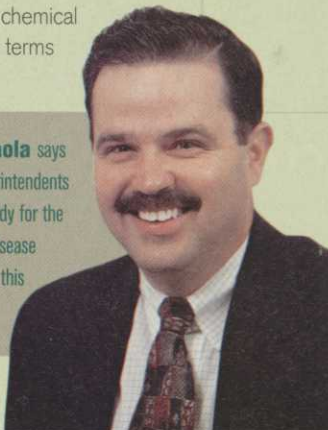
DiPaola calls 2005 a "solid year" for the chemical industry, although "not an outstanding situation" despite the disease prevalence.

"It wasn't like the Exxon situation," he laughs. "That's a whole different deal. We're up over the prior year, but we could have been up over the prior year despite the weather."

Skyrocketing fuel costs are hurting chemical companies, DiPaola says, particularly in terms of transportation and raw materials. Yet Syngenta has maintained its pricing structure from the previous year.

"I don't know how much better you can be in the face of all that. We're obviously eating quite a bit there," DiPaola says.

Joe DiPaola says some superintendents weren't ready for the waves of disease that struck this summer.



"If you do have something special, you can be successful," Hughes says. "But if you don't stand out . . . those price pressures are going to affect your business."

The courses that offer something special — from a terrain that can't be replicated to an experience that can't be duplicated — are getting golfers to pay the high green fees. Hughes cites the Dallas Cowboys Golf Club, billed as the country's only NFL-themed golf course, as a good example.

Tripp Davis, a golf course architect based in Norman, Okla., says the industry needs to be razzle-dazzle and more pragmatic to improve its economic health. For example, Davis would like to see fewer man-made waterfalls on golf courses and more Mother Nature-made natural areas.

"If you can build a golf course that does what you want and you build it for a cost that makes money in the long run, then why not go that route instead of spending an exorbitant amount of money on glitz and glamour that's wasteful," Davis asks.

Thompson says there's a vicious circle in golf where
Continued on page 30

Hurricanes Create Shortage of PVC Pipe; Projects Delayed

By Thomas Skernivitz, Managing Editor

The irrigation sector, as much as any that caters to the golf course industry, has suffered in the wake of the three hurricanes that struck the Gulf Coast region in 2005.

Irrigation projects across the country have been delayed because of a hurricane-induced shortage of PVC pipe, which is a byproduct of petroleum. And what pipe is available is at least 25 percent more expensive than it had been to start the summer.

"Right now, it's

almost what you'd call a crisis because some jobs are being held up

FOCUS ON: IRRIGATION

as a result of it," says Rod McWhirter, national specifications manager for Rain Bird Golf Division. "The hurricanes had a very profound effect. It's been a shortage as well as significant price jump . . . since the New Orleans hurricane (Katrina). That's causing some concern and some real obvious pain and agony among customers and contractors."

Contractors are especially hurting, as they're also having to foot higher bills for their lifeblood — diesel fuel.

"I've heard several golf course builders remark to me throughout the year, especially during the last half of the year, that the diesel prices are really hurting them," McWhirter says. "Contractors not only have their on-site diesel fuel costs, but they have the high cost of getting equipment from one job to another."

Hurricanes aside, the irrigation industry enjoyed a decent year, McWhirter says.

"It was a better year than we've had in the last four years. There was some improvement," he says.

Although new golf course construction remained "pretty slow" in the United States, according to McWhirter, the renovation business continued to pick up.

"Renovation is still the big focus for us because the new construction market is still soft," he says. "We're really focused on that; not to the extent where we're ignoring or abandoning the new business, but we've refocused a lot on the renovation business. And we'll probably continue to do that next year as well."

The situation differs significantly outside of the United States. McWhirter says new course construction is thriving in Asia, Europe, the Caribbean, Mexico and Canada.

"We do very well internationally," he says. "I wouldn't call it a golf boom, but the robust international market helps us a lot."

Rod McWhirter says his irrigation company is focusing on the renovation business.



Continued from page 29

one business segment overcharges another business segment and so on. "It has gotten out of hand," he says. "Everybody in golf is sticking it to everybody else."

Something similar has happened in Myrtle Beach, S.C., says Donald Wizeman, president and CEO of International Resort and Golf Resources, a golf resort consulting firm. Myrtle Beach, regarded as a golf Mecca in the South, is not getting the amount of play it did five years ago. Ten courses have closed or have been sold for redevelopment in the past two years, says Wizeman, who expects at least five more closings next year.

The area needs a jolt of contemporary and creative marketing to revive the tired golf scene, Wizeman says. Currently, he says golf courses are stealing business from each other instead of trying to grow the business together.

"It's a terrible situation," Wizeman says. "Everybody is struggling."

It's not that the Myrtle Beach market can't bounce back. "[Golf courses] need to understand that they have to work together for the common good," Wizeman says.

One could make the argument that Myrtle Beach was overbuilt with golf courses. The area peaked at about 120 courses a few years ago. Could it be undergoing a correction of sorts, similar to other areas of the country?

The number of courses being built in the United States has declined dramatically in the past five years. But because the golf course building blitz of the mid-1990s was excessive in some regions, the golf economies in those areas are correcting themselves. That's not a bad thing, says Hughes, noting that supply and demand is getting back in balance. "You can't sustain a healthy industry unless it's in sync," he adds.

Tom Stine, the co-founder of Golf Datatech, blames the golf course-housing development syndrome for the saturation problem.

"That business scenario doesn't work for the golf industry in all areas at all times," he says. "You have to remember that, at best, only 10 percent of the people in the United States play golf sometimes. So just because an area is growing in population, doesn't mean all those people are golfers."

Davis points out that home sales continue to drive the golf course market in some cities, such as Memphis, Dallas and Phoenix. "Home sales in those parts of the country are still going through the roof, and are still driving golf course communities."

That said, too many courses are built with little or no planning, Davis adds. Then expensive change orders are introduced during the building process, which drives up the cost of the course and eventually the cost to play a round.

While on the topic of expense, industry insiders are

Continued on page 32

As Disease Thrives, So Do Independent Distributors

By Thomas Skernivitz, Managing Editor

Until someone develops an invincible transition-zone grass, independent distributors such as TenBarge Seed and Turfgrass Supplies are going to prosper, especially during hot and wet summers like 2005.

"We're in the transition zone, and in this area there's no perfect grass," Chad Will, the president of TenBarge, says from his office in Haubstadt, Ind. "It seems like every (turf variety) has a downfall, and when you have a summer of heat and stress like this year, we had a lot of customers who lost grass that had to be replaced. That makes for a good year for us."

Bentgrass putting greens fared especially poorly, Will says.

Ninety-degree heat and wet conditions, including the season's hurricanes,

FOCUS ON: DISTRIBUTORS

intensified turf disease to levels that hadn't been seen since 1995. "In the 13 years that I've been in the business, it was definitely the worst year for pythium," Will says.

Previous mild summers may have lulled some superintendents into a false sense of security, Will says.

"Some guys slacked off on their spray programs a little bit," he says. "Because of the easy years we've had the last couple of summers, this year kind of caught them off guard."

In turn, chemical sales jumped for distributors. Will says his company experienced no shortages of inventory, nor had he heard of any fellow distributors running short of products.

As successful as 2005 was for TenBarge, it would have been even better if not for the high fuel prices. The company took a hit on freight charges, especially on seed deliveries from as far away as Oregon.

"It seemed to affect us more on incoming freight than outgoing freight," he says. "Those are unforeseen charges that aren't calculated (into the budget) and that you're really not aware of until you get the bill. That was a big surprise for us this year, and we had to address that."

TenBarge customers inherited some of those extra charges, although the company tried to absorb as much as possible.

"I wouldn't say there was a lot of backlash on that; maybe a few complaints here and there," Will says. "I think everybody saw the same thing with their own personal situations."

As for independent distributors, Will sees a bright outlook.

"I feel like that's the way of the future right now," he says. "The market is going toward the independents a little bit more, and we've been able to gain some market share."

Chad Will says increased freight charges didn't tarnish an otherwise successful year.



Continued from page 30

concerned that increased fuel prices will slow the business. But it remains to be seen whether gas prices will affect rounds of golf played.

Last year Charlie Fultz, the superintendent of Shenvallee Golf Resort in New Market, Va., fretted about losing traveling golfers from Northern states because of high gas prices. When prices climbed higher than Fultz ever imagined in the spring, he and others at Shenvallee were sure the course's business would take a hit. But they were wrong, much to their surprise.

"We lost a little bit, but I can't even put a percentage on it because it wasn't that much," Fultz says. "We kept waiting for people to call and say they weren't going to make the drive because it was going to cost them \$150 to get here. But they still came."

Stine says cases could be made that fewer people are playing golf because they need that money to buy fuel for their vehicles. But Stine believes those are rare instances.

"The guy playing golf three days a week is a serious golfer," Stine says. "The price of gasoline just doesn't enter into whether he's going to play golf on a Saturday or not."

Industry personnel agree that it's vital to do everything possible to grow the game, whether it's developing more players or improving operations and customer service.

Hurricanes, Heat Make for Tough Year; Glut of Courses Worrisome

By Thomas Skernivitz, Managing Editor

Although a fair number of North American golf courses closed in 2005, the industry expanded by about 80. And with similar net growth expected in the near future, Gregg Brenningmeyer is a bit concerned.

"I remain troubled by the number of new golf courses that are coming in," says Brenningmeyer, the director of sales and marketing for John Deere Golf & Turf One Source. "To

me, that is troubling because I don't see the commensurate number of new golfers coming into the game, so the competitive environment is going to get even stronger in the near-term future."

More competition tends to mean tighter budgets. And tighter budgets often take their toll more quickly on equipment manufacturers than other sectors of the golf industry.

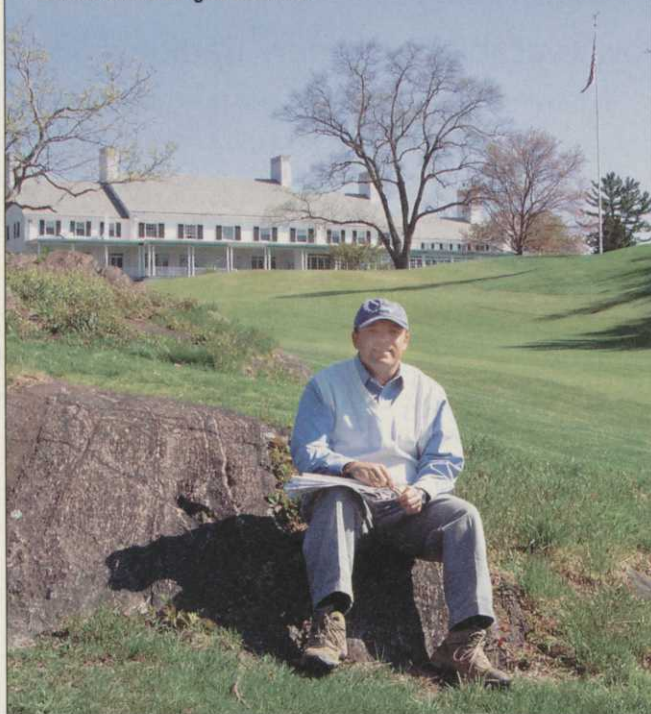
"When budgets are under stress, that creates a need for (superintendents) to make what they've got last longer and stretch out their dollars even further," Brenningmeyer says. "Immediately, people will delay a package purchase or they'll extend their lease by a year instead of what they originally planned. It forces the manufacturers to re-evaluate their value propositions."

No major shifts in global market share were experienced among the major equipment manufacturers in 2005, Brenningmeyer says.

As for the golf industry in general, he calls 2005 "more troublesome" than the recent trend, primarily because of weather issues. The hurricanes that hit the Gulf Coast region and the summer heat that hindered the east-

FOCUS ON: IRON

Architect Tripp Davis says he would like to see fewer man-made waterfalls and more Mother Nature-made natural areas on golf courses.



Hughes says owners across the board want more player development programs. "They certainly want that to stay on the top of the agenda of the golf associations."

Hughes also says owners desire better financial information to operate their businesses. NGCOA recently teamed with Golf Datatech to help develop that information through the Financial Benchmarks Program. Hughes says the program provides accurate and consistent industry measurements to help owners and operators evaluate the performances of their facilities. They can also use the information to compare their results to their competitors' results.

Fultz says improved customer service should be at the top of everyone's lists. "We have to treat golfers the best we can treat them," he adds.

If the game grows and rounds increase 5 percent next year, you just might see Mike Hughes flinging his 5-iron in the air in an act of jubilation. But, as Stine stresses, golf is not Google stock, and it's important to remain realistic as far as the game's growth is concerned.

"Would we rather have rounds played up 10 percent? Yes, but rounds don't go up 10 percent in a good year," Stine says. "The golf business doesn't see huge increases like that, nor does it see huge decreases like that. It's just the nature of the industry." ■

ern half of the country combined to cause "significant stress," he says.

High fuel prices also cut into consumers' leisure spending. "Which again perpetuates itself with fewer rounds being played and even lower revenues in terms of greens fees," Breningmeyer says. "With the convergence of all these elements, it was almost like the perfect storm for a lot of golf courses."

As for the effect of increased gas costs on equipment manufacturers, Breningmeyer says it's been minimal. No plans were altered at John Deere; none were scrapped. "Even with our hybrid technology that we introduced last year, the gas savings were a result of technology," he says. "The driving goal of that product was to reduce noise and to reduce hydraulic leaks."

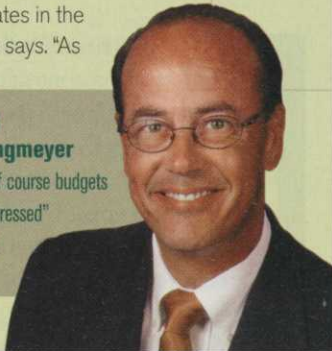
The feedback concerning John Deere's hybrid technology has been "incredibly encouraging," Breningmeyer says.

"Like any new technology, you've got the early adopters. Then you have to get over what we call the "valley of death," to where it becomes a mainstream-type product," he says. "We've had great success in our planning. And globally the response is very encouraging."

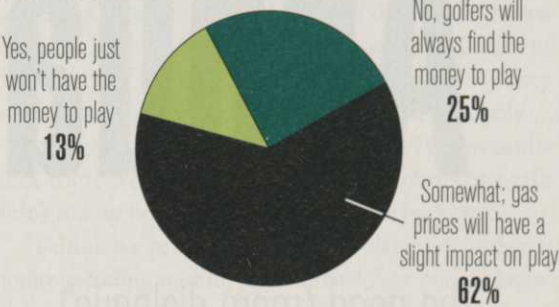
Breningmeyer adds that from a historical perspective, one bad year doesn't mean the future is bleak.

"We've weathered all types of climates in the past, but this is a resilient business," he says. "As the industry encourages new golfers, superintendents continue to effectively manage tight budgets and suppliers introduce new, viable business solutions, there's certainly promise for the future."

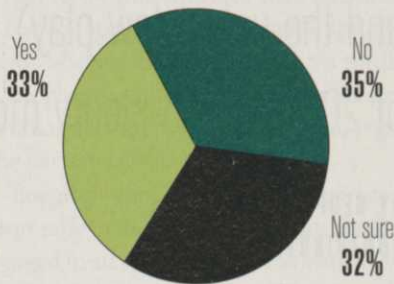
Gregg Breningmeyer
says golf course budgets were "stressed" in 2005.



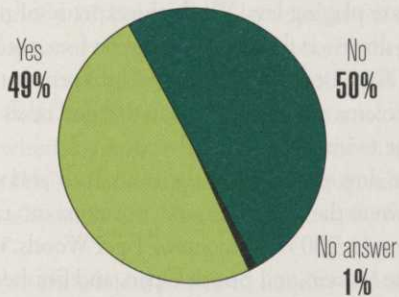
Are you worried that high gas prices will lead to a decrease in golf course rounds and revenue in 2006?



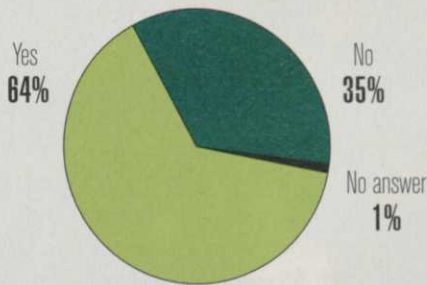
Are you confident the economy will improve in 2006?



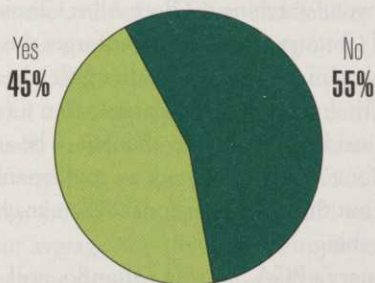
Did your course's revenue increase this year?



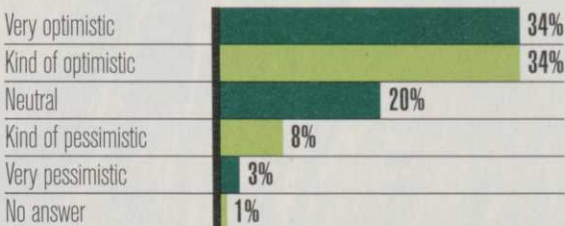
Did the economy affect your course's revenue in 2005?



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 380 superintendents and other golf industry personnel who participated in *Golfdom's* October online survey.

Annual Review

The good (more dialogue),
the bad (increased costs),
and the ugly (slow play)
of 2005 – and plenty more

BY GEOFF SHACKELFORD,
CONTRIBUTING EDITOR



Maybe it was Abe Lincoln. Or John Wooden. Someone said we should never confuse change with progress. But another year in the golf industry seemed to prove that those with the most influence view change as progress.

Unfortunately, that change tends to include rising costs, slower play and little concern for the plight of golf course owners.

There was, however, more dialogue in 2005. Issues were debated with a goal toward securing the game's long-term health.

Rounds look like they'll finish about flat, but avid golfers are playing less. While the expense of playing is coming down via flat or lowered green fees, course owners and even established country clubs report that slow play problems and the perception that golf takes too long continue to impact rounds played.

Since slow play starts at the PGA Tour and works its way down to the daily-fee round, operators can take heart in the cranky 2005 comments of Tiger Woods, who captured the Masters and British Open, and finished second and fourth in the U.S. Open and PGA Championships, respectively.

"Our Tour is so slow," he said after another deliberate round. "Welcome to the PGA Tour, five plus."

And anyone watching the Booze Allen Classic at Congressional Country Club will never forget the antics of Rory Sabbatini, who played half a hole ahead of his infamously sluggish playing partner Ben Crane. The unsavory incident was initially thought to be an embarrassment for a sport priding itself on gentlemanly sportsmanship, but the ensuing national debate may prove to be a good thing.

At January's PGA Show in Orlando, golf industry



Tiger Woods
says the Tour
is too slow.
No kidding!

titans convened for a lightly attended seminar to discuss the state of the game.

"You might want to do this a little later in the day next time, hopefully get a few more people here, but thanks to all of you who did come out," said Fred Ridley, outgoing president of the United States Golf Association (USGA).

Besides several shows of mutual admiration among the panelists along with light applause for their efforts on behalf of women and minorities, the annoying topic of technology and its impact on golf courses came up. Audience members chimed in.

"The lustiest cheer came when a Michigan woman, the owner of a 27-hole course, lamented how the new balls and space-age equipment were rendering her 1960s-built course obsolete," reported Cybergolf's Jeff Shelley.

"You need more acreage, and maintenance costs are higher (when managing more turf) for both accurate golfers and high handicappers," the woman said. "One guy with a hot club and a hot ball will slow play for everyone else."

She also mentioned increased liability problems for course owners and directed her remarks to the USGA's Ridley. The course owner explained that when her course was built, homes lining the fairways were plotted when 250 yards was the longest drive. With 350 yards the longest drive now, the course faces safety and liability concerns.

Ridley said the issue has been going on for 100 years, and that the USGA has done more in the past seven years to deal with it than the previous century combined.

"We really haven't seen the types of increases in the past couple of years that we saw back in the 1990s," he said.

Actually, the 1999 Tour average was 271 yards and the 2005 Tour average was 288.9 yards, up almost 2 yards from last year despite 18 rain-delayed events in an

unusually wet year across the country. A Tour record 26 players finished with drives averaging more than 300 yards.

A Golf Datatech consumer survey found that 37 percent of those questioned believed distance is threatening the integrity of the professional game, up 6 percent from the year before. A surprising 45 percent say they would support limits on equipment for the pros only.

But the USGA's Ridley told the PGA Show audience there were signs that all of the technology talk didn't matter because golf is on the comeback trail.

"I think we've seen corporate involvement and corporate spending starting to come back," he said. "I know in our environment that has certainly been evident at our championships. Certainly, for the U.S. Open, we are going to have a terrific year at Pinehurst."

The U.S. Open was wonderfully successful thanks in large part to the fine efforts of the Pinehurst team to pull the course together despite dreadful spring growing conditions. Michael Campbell won on a thrilling final day that saw players combat the famed Donald Ross course in an unusual way: drive as far as you can, regardless of where the fairway or hole location is.

The "flogging" approach became apparent at Doral Golf Resort early in the year where Woods and Phil Mickelson engaged in an epic dual, but was actually started by Vijay Singh, who grew tired of trying to keep his drives in between the Tour's increasingly narrowed fairways.

Here's what Tiger said about flogging after the round to NBC: "Because of the hole locations, even if you put the ball in the fairway, it's still unbelievably difficult to get close to. So even if I drive it in the rough, it's no big deal. I have a 60-degree sand wedge in my hand and figure I can hack it up there and make birdie."

Pinehurst offered a chance to see how much the game has changed in the six years since it last hosted the U.S. Open. In 1999 the field hit 38.8 percent of the fairways, 40.6 percent of greens in regulation and averaged 268.0. In 2005 the field hit 30 percent of fairways, 43.3 percent of greens and averaged 300.3 yards off the tee.

The U.S. Open marked the swan song for the USGA's infamous course setup man, Tom Meeks, and ushered in the era of Mike Davis. The Open also provided the USGA a chance to explain how the organization is on the cutting edge of research. In an NBC pre-packaged segment, senior tech guru Dick Rugge likened the golf ball to a train that has stopped at many stations, and said, "We think we've stopped it in the right station right now."

Executive Director David Fay told audiences that the USGA was 2.5 years into a research project and that things haven't changed, though it was interesting to note that the USGA reminded viewers that it has drawn the line on

Continued on page 36

Continued from page 35

distance before it embarked on the research project.

In April the USGA asked manufacturers to submit "rolled back" balls for testing as part of the research program. As of September, none had complied. Because the problem remains a simple one: Manufacturers have been able to design a ball that passes the USGA overall distance standard under the stipulated launch conditions but exceeds the distance standard under different launch conditions. In other words, some people are driving 80 mph and the radar gun still says 55 mph.

Golf's 2005 majors proved unusually memorable, with a wild Masters shootout between Woods and Chris DiMarco, eventually won by Woods with a birdie on the first sudden-death playoff hole.

The Masters also saw the classy, understated farewell of Jack Nicklaus, who was visibly emotional coming up Augusta's ninth hole during Saturday morning's rain-delayed play.

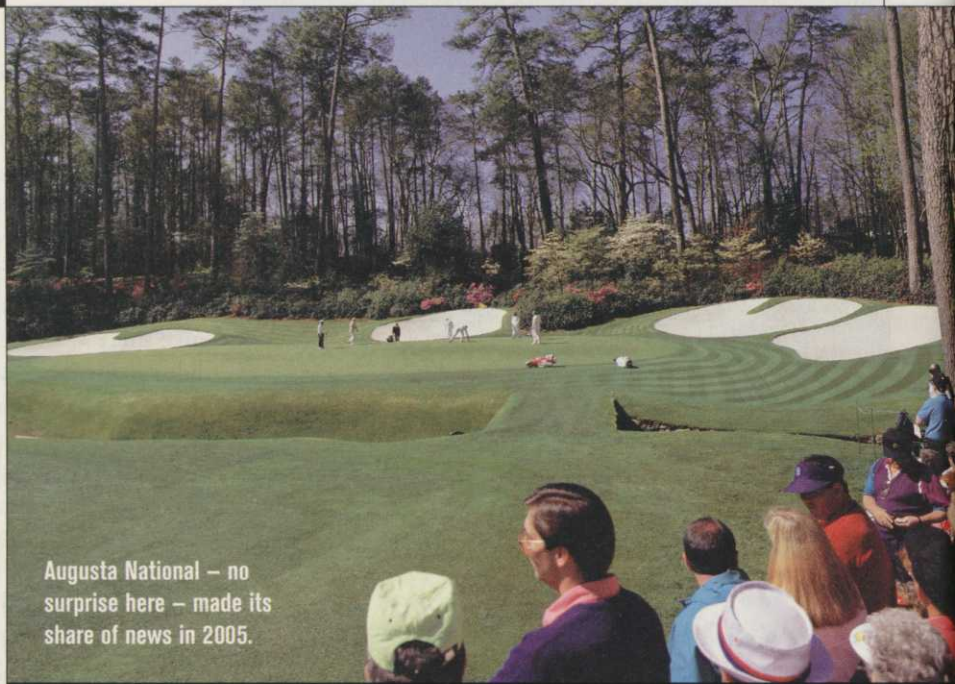
Afterward, Nicklaus said: "Unless I can gain 10 mph more clubhead speed, then I'm not coming back. How is that? I don't think that's going to happen."

The other real star of Masters week was the SubAir subsurface aeration system that kept Augusta's surfaces firm despite torrential rains. The Golf Channel, doing its typically fine job during Major coverage, went behind the scenes and allowed SubAir to show off its remarkable product, which was invented and patented by Augusta's Marsh Benson.

The PGA Tour has since announced that SubAir systems will be part of its \$26 million major TPC Sawgrass renovation, which starts the day after the 2006 Players Championship and includes a massive golf course overhaul to be supervised by Pete Dye.

The British Open saw another Nicklaus farewell, this time on the grandest stage in all of sport. With bright sun and fans filling every open space around the final hole at St. Andrews, Nicklaus' unforgettable birdie on the final hole made for a fitting conclusion to his career in the Open Championship.

Woods put on his second straight dominating performance at St. Andrews, though it was the meticulously groomed Old Course that got more attention than usual thanks to the Royal and Ancient Golf Club's setup antics.



Augusta National — no surprise here — made its share of news in 2005.

Forced to lengthen the course, tees were built outside the Old Course's well-defined boundaries. In an unprecedented move, the R&A introduced a "moveable" out-of-bounds line between the first and second holes to preserve traditional boundaries.

And you thought your green committee was a little nutty?

The R&A also introduced defined fairway contours on a course long known for its absence of such man-made interference. The fourth hole featured a 290-yard carry while the infamous Road Hole (17th) saw its fairway end at 300 yards from the tee, forcing players to lay back so that the R&A could claim that distance had not made the Old Course obsolete.

The battle to host a major championship became even more fierce this year when the PGA of America dropped 2010 host Sahalee Country Club in favor of new favorite Whistling Straits.

Meanwhile, the USGA is already eyeing the highly anticipated Erin Hills Golf Course outside Milwaukee. The rolling, links-like public course is a Dana Fry-Michael Hurdzan-Ron Whitten design that can be stretched to 8,000 yards. The USGA has already awarded it a Women's Mid-Amateur, with a U.S. Open looking like a possibility somewhere in the near future. Best of all, the Erin Hills ownership wants to keep green fees at the course affordable.

Other public venues were in the spotlight as well. San Francisco's renovated Harding Park course cost the city \$16 million to spruce up, but the resulting American Express Championship proved to be one of the year's best

Continued on page 38

Continued from page 36

Tour events with huge, festive crowds turning out to watch Woods and John Daly show that golf can be exciting when played on a stage accessible to daily-fee players.

Things weren't so rosy south of Harding Park in San Diego, where the renovation of Torrey Pines South has left residents bitter. The San Diego City Council voted down a North Course redo, 9-0, after residents complained that South Course conditions had deteriorated since the greens were rebuilt to USGA specs. They also argued that the North Course was still fun to play, while the South — host to the 2008 U.S. Open — was not.

"I am struck by the fact that we were asked to approve these changes before there was a design," said Councilman Brian Maienschein of the proposed North Course. "Why do you need an architect like Rees Jones to do maintenance work? I played baseball, and when they talked about maintaining the field, they weren't moving the bases 80 or 100 feet."

Torrey Pines brought in maintenance guru Ted Horton, who helped lead the South in a better direction in time for January's Buick Invitational.

Golf lost several noted figures in 2005, including master golf writer Herbert Warren Wind, architects Jack Arthur Snyder, Floyd Farley and rising star Mike Strantz. Strantz, a North Carolina resident, had just opened his finest achievement, the redesign of Monterey Peninsula's Shore Course. Taking the outdated 1960 Bob Baldock design, Strantz rerouted the holes familiar to 17-Mile Drive tourists and injected his unique style of native plantings, vast sandy waste areas and rolling greens to transform the Shore into a model for future course redesign work.

Which just happens to be the next big trend in design: bring your course into the new century with a fresh look. The American Society of Golf Course Architects (ASGCA) new president, Tom Marzolf, is preaching that courses

establish long-range plans and "life-cycle planning" to prevent reaching the stage that many layouts have: tired or deteriorated conditions that only a costly redo can fix.

Part of Marzolf's emphasis is to ensure that courses better account for aging components of their design, such as irrigation and improved drainage, to lessen the need for cost future expenditures.

The most bizarre aspect of the redesign trend may be the number of courses bringing their original architects back to liven up their own works or to fix mistakes made. *Golf Digest's* Ron Whitten wrote about finding the trend fascinating since so many architects are getting second chances. He cited *Golf Digest's* Best New Course of 1985, Jack Nicklaus' Loxahatchee, where the course was framed by pointed knobs covered in plenty of lovegrass.

"I decided I really didn't like them," Nicklaus said when announcing that he was being brought in to redo his own design. "So we tried to modernize it, bring it into the framework of today's game."

Another striking aspect of the redesign trend is the skyrocketing cost of fixing up an existing course. Donald Trump estimated (with pride) that the redesign of one hole at his "re-branded" Trump National Los Angeles design cost \$61 million.

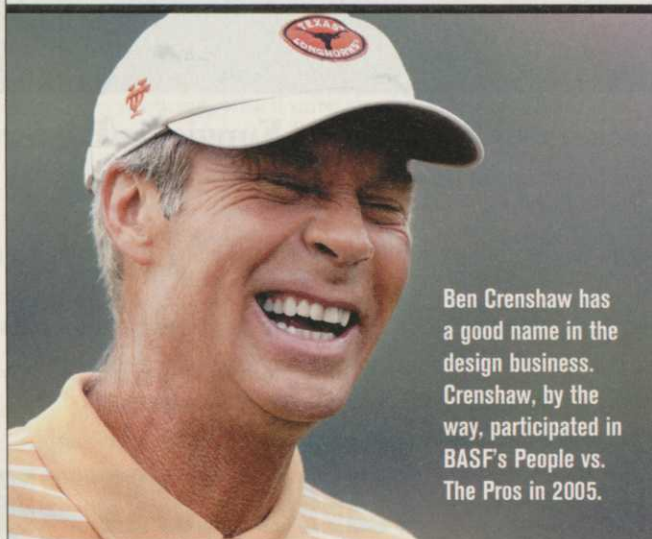
The Golf Resort at Indian Wells and the city of the same name announced they were embarking on a planned \$45 million renovation. *The Desert Sun* reported that "some changes in store for the public golf resort are an \$18 million course expansion that will add six new holes to the existing 18-hole course. The rest of the \$45 million will be used on a new clubhouse and colorful landscaping, such as wildflowers and tumbling waterfalls."

A comprehensive *Golf Business Monthly* story also opened many eyes by adding to the typical 19th-hole discussion on the value of name architects.

Dan Gleason wrote about South Carolina-based Sportometrics' intensive quantitative research on the value of a name designer. "There were 80 variables that went into a study that took into consideration the green fees charged at the courses designed by high-profile names and included both public green fees and private club guest fees. Ben Crenshaw's name generated the highest added value in the study."

He also quoted David Fry of WCI Communities, who put the celebrity designer debate into perspective. "I can't forecast the true value of the celebrity name of an architect," he says, "even after the course is operational and all the homes and memberships are sold. The bottom line is building a quality product, regardless of the name you put on the course. That's where the rubber really meets the road." ■

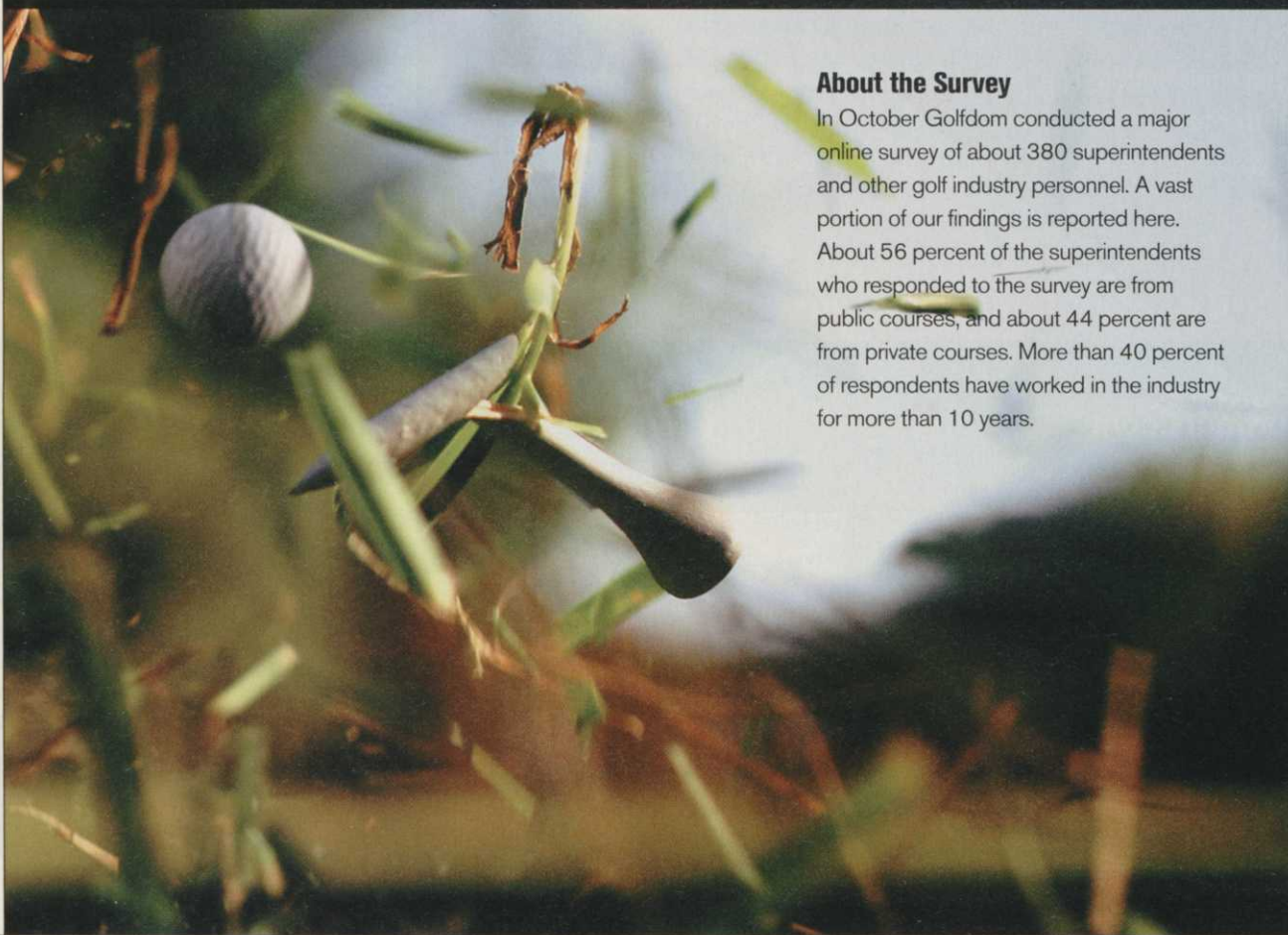
Geoff Shackelford can be reached at GeoffShac@aol.com.



Ben Crenshaw has a good name in the design business. Crenshaw, by the way, participated in BASF's People vs. The Pros in 2005.

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

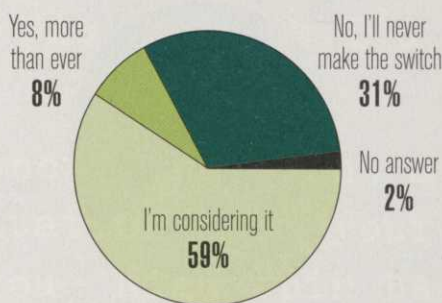


About the Survey

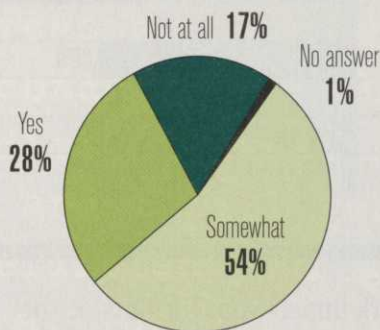
In October Golfdom conducted a major online survey of about 380 superintendents and other golf industry personnel. A vast portion of our findings is reported here. About 56 percent of the superintendents who responded to the survey are from public courses, and about 44 percent are from private courses. More than 40 percent of respondents have worked in the industry for more than 10 years.

“I love someone who can look at a divot and figure out exactly what the hell a guy’s golf swing did to create it. I think that’s cool.” – **Rick Reilly**, Sports Illustrated columnist, on what he thinks of superintendents.

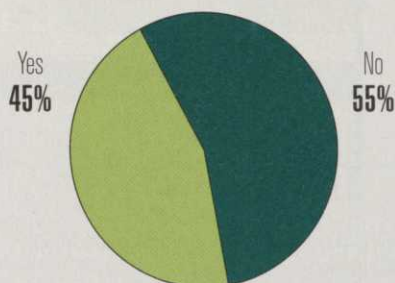
With the sharp increase in gas prices, will you consider using more electric equipment to offset fuel costs?



President Bush recently urged Americans to conserve energy, especially gas. Are you doing your part on the golf course to conserve?



Was your course damaged or hindered by bad weather in 2005?



“You go further south and *Poa annua* is a weed in our region. You go further north and it’s a desired surface. So we sort of split the middle here with it. If [superintendents] are trying to kill *Poa*, we can figure out how to do that. If they’re trying to manage it, we can figure out how to do that too.”

– **Keith Happ**, senior agronomist for the USGA Green Section’s Mid-Atlantic Region, on the respect and disrespect that superintendents have for *Poa* in his region.

“I do like disease. If that makes me strange, so be it.”

– **Bruce Clarke**, director of the Rutgers Center for Turfgrass Science and a turf disease aficionado.

“That show was just hectic.”

– Irrigation consultant **Dave Davis** on getting around at the sizable Golf Industry Show last February.

“It looks like somebody who works – and not at golf.”

– **Jon Jennings**, certified superintendent of the Chicago Golf Club, describing what his golf game looks like.



“Turf equipment gets [treated harder] than any other equipment I’ve seen. And I’ve seen it all. I’ve worked on everything from tanks, hand mowers and 18-wheel tractor-trailers. Turf equipment gets abused the most.”

– **Jay Rehr**, president of Turf Equipment Consulting and well-known golf industry mechanic.

Continued on page 42

Continued from page 41

In this business you will be humbled. I don't care

how good you are or how good you think you are, Mother Nature can take it away from you any time."

— **Jimmy Ellison**, vice president of agronomy and golf course maintenance for Arnold Palmer Golf, on golf course maintenance in the real world.

"Let's face it: We're a chemical company. If nobody stands up for it ... well, we shouldn't be surprised if people say we don't need chemicals anymore."

— **Hans Reiner**, BASF executive, on the realities of the business.

"Thanks for the memories, Jack!"

— A fan yelling to Jack Nicklaus on the second day of the Memorial Tournament at Muirfield Village Golf Club in May. Nicklaus missed the cut in what could have been his last tournament at the Dublin, Ohio, course he designed and built.

"We don't talk about hurricanes here any more. It's like taboo."

— **Rob Kloska**, superintendent of the Jupiter Island Club in Hobe Sound, Fla.

"There's not a whole lot to do around here. But you manage."

— **Jerry Bonner**, who interned on the golf course maintenance staff at Pinehurst No. 2 this year, on the nightlife in the quaint town of Pinehurst, which ain't exactly Vegas.

"Reality is reality, and Mother Nature wins all battles. Just like today, I wanted rain but not an inch and a half."

— **Paul Galligan**, superintendent of Grand Traverse Resort in Traverse City, Mich., on dealing with the weather.

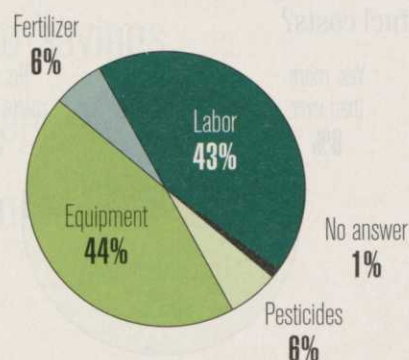
"I can't think of anyone who has put themselves through more misery than I have."

— **Shawn Emerson**, director of agronomy of Desert Mountain in Scottsdale, Ariz., who has participated in more than 50 golf course overseedings. ■

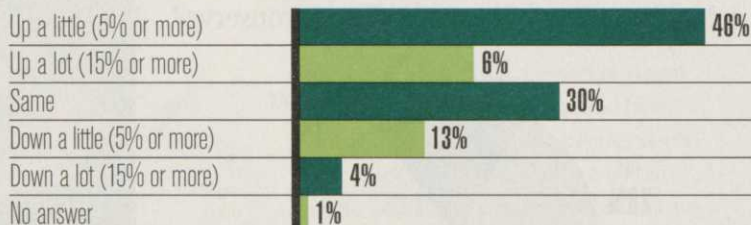
If there's one thing you could change about your job, what would it be?



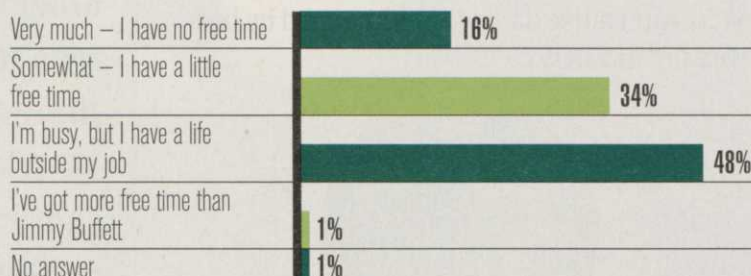
What is the area of your budget you're most likely to cut when asked to do so?



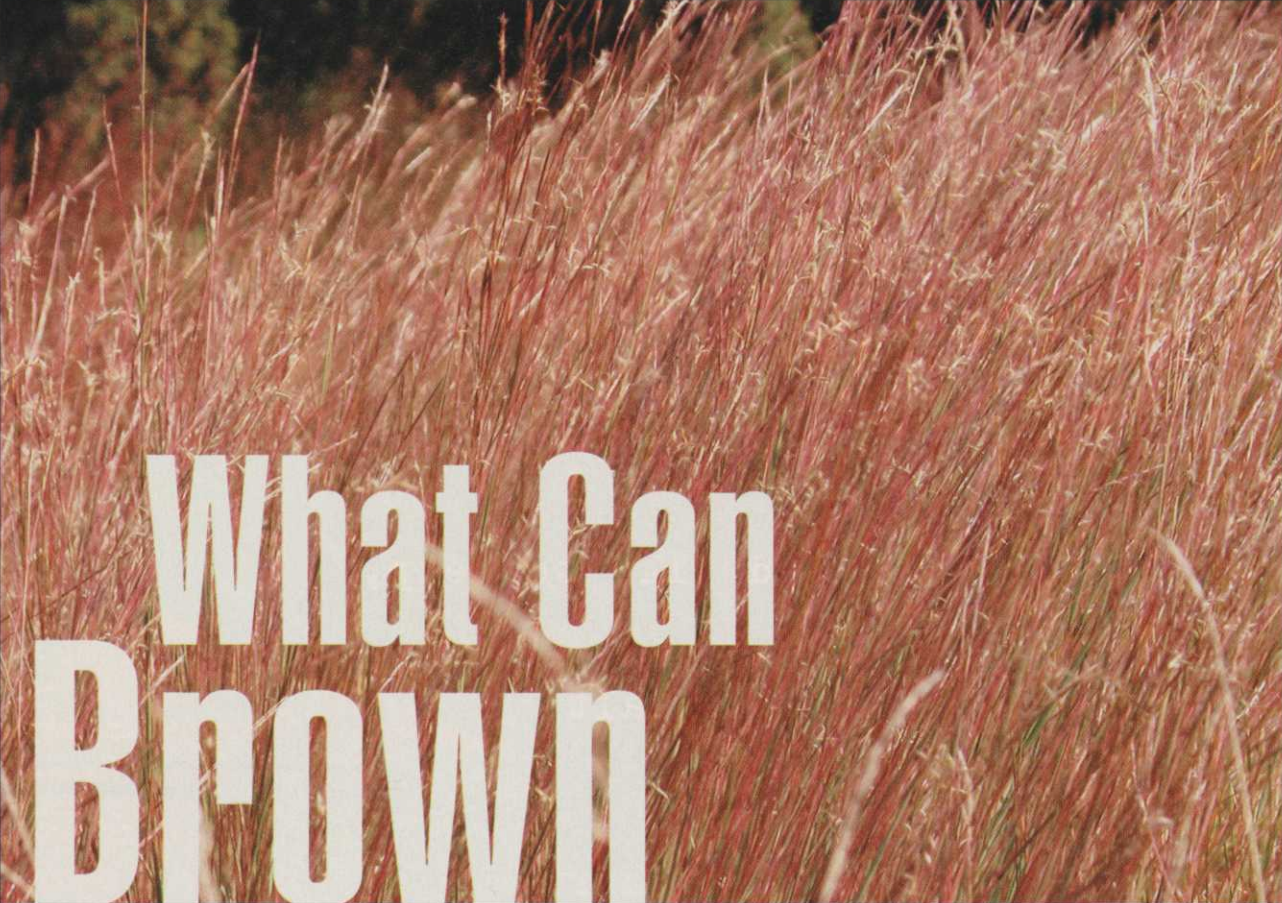
Do you think your 2006 maintenance budget will be...



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



Editor's note: Findings are based on responses from 380 superintendents and golf course employees who participated in *Golfdom's* October online survey.



What Can Brown

Do for You?

BY RON FURLONG

For starters, it can save
a few bucks . . . as well as
the environment

You know that saying, "The grass is always greener on the other side of the fence"? I think it's fence. Maybe it's "the other side of the hill"? Or maybe "the other side of town"? Anyway, you know the saying. Imagine for a moment a time in the future, maybe the not-too-distant future, when that saying changes from "the grass is greener" to "the grass is browner." Doesn't quite have the same ring, I admit, but we may just be headed in that direction.

Golf course superintendents are as guilty as anyone in wanting the golf course green and healthy. I'd be lying if I said aesthetics didn't matter to me. They matter to me

Continued on page 46

Continued from page 44

probably as much as playability. I guess that leads to the question of what is aesthetically pleasing? Does turf have to be green to be appealing to the eye? Are we conditioned to the point where we think grass has to be green? What if we opted for some yellows? Or, yes, even a few browns.

What can brown do for you? Well, deliver your packages on time of course, but what else? Imagine intentionally shooting for a certain level of browns in your fairway, and another level in your primary rough. Maybe even a third shade in your secondary rough, or perhaps we're getting into the wispy shades of yellow in the deep stuff. What would be some of the positives to such an approach?

- How about the chance to feel like you're making a significant contribution to the environment. How? Well, no mow zones for one. Also, you'd be creating out-of-play areas, enhancing wildlife and cutting down on fuel and pollutants.

- Creating biodiversity.

- Creating more diverse aesthetics. You can only have so much lush, green, manicured turf on your golf course. Wildflowers, wetlands, native grasses ... the list is endless.

- Better fairway playability. Lush turf on your fairways does not always equal great playing conditions.

- Make your members into longer hitters. Roll, baby, roll.

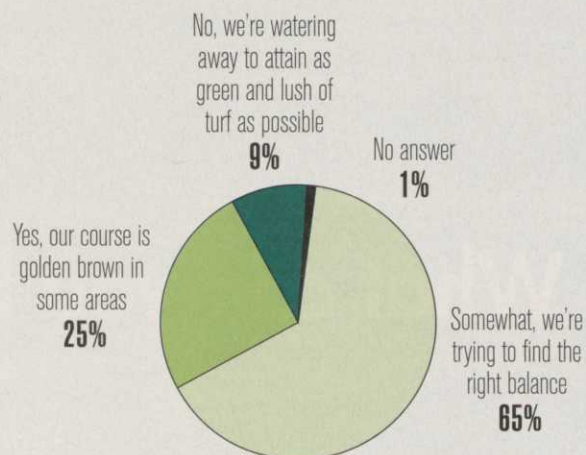
- Here's a good one: Save money! Less water, less fuel, less equipment repairs, less labor.

The very quotable A.W. Tillinghast, the great golf course architect from early in the last century, once wrote: "I do not endorse the necessity of watering the entire course, or I might say the desirability, no matter how much money you may have. Surely watering may be carried to the extreme, as certainly is the case frequently in the watering of putting greens. ... In many cases there is the tendency to rush to the conclusion that the fairway turf is dead after a drought because the plants are browned and seared. I do not recall in these parts (northeast United States) ever seeing any well-established fairway turf permanently destroyed by drought. Apparently dead, the grass will be restored to color when the rains do fall finally, for the roots are alive. ..."

I won't take this forum to present any arguments against Tillie's agronomic theories, but his words do invoke consideration, even today.

Returning to golf's roots, that's what we're talking about here, as in the way the game was meant to be played. But be careful now, technology is not such a bad thing. Things have improved, and the manner in which we accomplish tasks is more often than not better. But maybe a very small, cautious step backward, gingerly extending your toe into

Are you managing water use as efficiently as possible?



Editor's note: Findings are based on responses from 380 superintendents.

the past, is possible here. Maybe a little more knowledge of the true nature of this sport's past is in order.

In 1842, William and Robert Chambers printed the following words in the *Chambers Edinburgh Journal*: "To appreciate golf fully, it must be studied in some such school as that of St. Andrews, where its whole character is fully developed, in consequence at once of the admirably adapted ground, and the enthusiasm of the votaries."

The "admirably adapted ground," of course, is not all that green. We all watched a wonderful Open this past July on the hallowed grounds, which were shimmering in yellows, browns and a slight hint of green. Jack bid his farewell on the bridge and not a dry eye in the house could be found as he extended his arm around Tom Watson and the two of them basked in the true color of the sport — brown. I don't remember any commentator mentioning the lack of lush, green turf.

If one were arguing the side of green against brown, perhaps he would present as his visual example the storied grounds of Augusta, nearly as legendary as St. Andrews. Just as it would be hard to argue against those on the side of the browns of St. Andrews, it would be nearly as difficult to deny the perfection of that pristine golf course in Georgia. The very green golf course in Georgia. So who would win the debate? I have no idea, but I think what we're left with is maybe aiming for a bit of both worlds.

It is undeniable that water, pesticide and other restrictions are going to change the way golf courses are managed in the future (it is already happening on many properties), and consequently, the way they look. This decision of choosing brown may be made for us. But

Continued on page 48

Continued from page 46

maybe we can choose where our browns and yellows will be. Maybe we can dictate where shortcuts may be made and choose agronomic decisions based on playability concerns as well as environmental concerns.

One obvious choice would be the lessening of irrigation on the fairways and letting them brown a bit. I work at a golf course in western Washington where we actually welcome a color other than green when we can get it. This region is lush and green most of the year. A chance to firm it up and let the ball roll down the fairways is welcome in July and August.

I would also think the wall-to-wall practices many of us implement with regard to water need to be considered and perhaps amended. Do you need to water the rough? If your answer is "yes," OK. Then, do you need to water the secondary rough? Yes? OK, then do you need to water out-of-play areas you are not even mowing? Do you have some? Could you have more? Seasonal wetlands, areas that only hold water for part of the year, are another great way to increase biodiversity.

In consideration of what brown can do for you, and how it might affect what the modern-day golfer perceives as "playability," let me pass along a few words from the one and only Old Tom Morris. Here he is writing about the shameful removal of the whins at St. Andrews a good 100 or so years ago (I have to admit I have no idea what the heck a whin is, but that's beside the point), and a few words on some other hazards there. I must say after reading his words, I have a strong inclination to turn off the fairway irrigation, stop raking the bunkers and try to grow some gorse.

"In St. Andrews the whins have ceased to mark with their golden bloom the heathery boundary of the course. Yet what skill was needed — especially with a side wind — to avoid the seylln of the whins without being caught by the Charybdis of the bunker! It was no joke to extricate the ball from a dour whin; but this has been ruthlessly removed for a different style of play.... The heather at the sixth and ninth holes is scarcely worth calling a difficulty. Where are the rushes at the second hole? Besides



This area of native grasses at Newton Country Club in New Jersey was formerly maintained turf.

these, players have to contend with streams, roads and railways; and in some greens with trees, hedges and walls.... Unplayable snares like rabbit holes should not be called hazards, because no one can remember where those are."

Think about the words Old Tom writes above — "... a different style of play." He is not talking about this different style of play kindly. What do you think Old Tom would think about our "green" mentality today, and the bite we've taken out of the golf courses over the last 20 years? The golf courses look good, and they probably play easier than they did in years past, but is that really where we want to be?

"What skill was needed to avoid the seylln of the whins without being caught by the Charybdis of the bunker!" I don't know what the heck that means, but I agree with it! ■

Ron Furlong is the superintendent of Avalon Golf Club in Burlington, Wash., and a frequent contributor to Golfdom. He can be reached at RF7500@aol.com.