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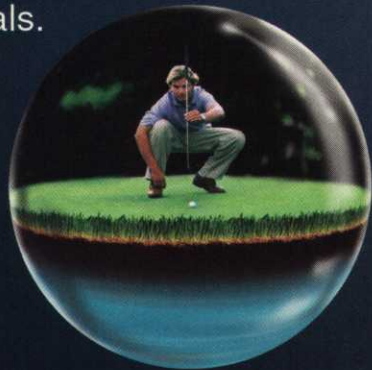
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The Big Picture

THE NUMBERS THAT SHAPE YOUR BUSINESS



Football Scores Big How About Golf?

Percentage of Americans who are fans of these sports:

NFL	67%
Major League Baseball	59%
College football	56%
NBA	51%
Figure skating	50%
College basketball	47%
NASCAR	45%
Pro Golf	40%

ESPN

GETTY IMAGES

Golf Rounds Played

The percentages below represent the difference in number of rounds played in the month of December 2003 compared to the number of rounds played December 2002.

REGION	DECEMBER	Y.T.D.
New England ME, VT, NH, MA, RI, CT	80.2%	-6.8%
Middle Atlantic NY, PA, NJ	81.8%	-9.3%
East North Central MI, OH, IN, IL, WI	75.2%	-1.2%
West North Central ND, MN, SD, NE, KS, IA, MO	-35.1%	1.6%
South Atlantic WV, DE, MD, VA, NC, SC, GA	5.3%	-2.8%
Florida	5.8%	2.4%
East South Central KY, TN, AL, MS	10.1%	1.1%
West South Central OK, AR, LA	10.8%	-1.2%
Texas	10.1%	-1.7%
Mountain MT, ID, WY, NV, UT, CO, AZ, NM	-12.4%	-2.7%
Pacific WA, OR, AK, HI	-3.8%	-2%
California	-3.7%	-3.2%
TOTAL UNITED STATES	2.4%	-2.6%

GOLF DATATECH

On to Orlando

Attendance for the GCSAA Conference and Show in San Diego was 19,317, up 1,153 from last year's total of 18,164 in Atlanta. We asked superintendents recently if they planned to attend next year's show in Orlando, which will combine with the National Golf Course Owners Association to form the first Golf Industry Show. Here's what they had to say:

You bet	61%
I plan to, but the budget will decide	27%
Not likely	6%
Can't get away from work then	0%
Don't know	7%

* BASED ON 101 RESPONSES



Golfdom

IMAGE LIBRARY

Did You Know ...

... that 45 percent of superintendents play golf at least once a week and 24 percent play at least once a month?

... 54 percent of superintendents serve as consultants (paid or unpaid) for athletic facilities or grounds other than their golf courses?

GOLF INDUSTRY REPORT 2003



DIGITAL STOCK

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TORO Count on it.

Off The Fringe

Business briefs

LESCO launches interactive site

LESCO customers will soon be able to purchase products on the company's Web site. Revamping the company's Web site was long overdue, said Michael P. DiMino, president and chief executive officer of Cleveland-based LESCO. The company has introduced LESCO Direct, located at www.lesco.com.

"The Web site extends the level of service that we can provide our customers by creating an information-packed, online presence," DiMino said.

Customers will soon be able to order products from LESCO through the site and have them ready for pickup the next morning. "Our new Web site gives our customers secure, password-protected access to their corporate accounts anytime and provides up-to-the-minute details on orders, payments and credit limits," said Brett Barthel, LESCO's vice president of marketing.

In other company news, LESCO announced that net sales for 2003 increased 2.3 percent to \$523.5 million, up from \$511.7 million in 2002. Same-store Service Center sales increased 5.1 percent, or \$16.3 million, to \$336.4 million from \$320.1 million in 2002, while total Service Center sales increased 8.3 percent or \$26.4 million to \$346 million.

Golf gross sales declined 1.8 percent to \$137.8 million from \$140.3 million in 2002.

Matuza honored as 'Master Greenkeeper'

Town of Oyster Bay Golf Course's Stephen Matuza was awarded the prestigious Master Greenkeeper Certification from the British and International Golf Greenkeepers Association (BIGGA).

Matuza is one of thirty-nine professionals worldwide and 12 nationwide to attain this designation.

Briefs continue on page 22

NTEP Gets a Lot to Chew on

'LISTENING' SESSION SPARKS MUCH TALK ABOUT IMPROVING THE PROGRAM

By Ron Hall

They asked for it in their first-ever "listening session," and they got it—lots of suggestions to improve the

National Turfgrass Evaluation Program (NTEP). The "listeners" seeking feedback on the NTEP program were NTEP Policy Committee members and Executive Director Kevin Morris.

In a classic example of "be careful about what you ask for, you might get it," the audience of 52 people, most of them either seed marketers or turf breeders, came up with a long list of suggestions to either broaden NTEP's scope or improve its rating system.

The question that everyone left the room with was: How many of these suggestions can (or should) NTEP implement? The suggestions offered at the two-hour session held during the GCSAA Conference and Show in February will give NTEP policy members a lot to talk about when they next convene in June, especially since most of the audience seemed pleased with the program in general, and nobody suggested wholesale changes.

The NTEP, of course, is North America's unbiased source for information about turfgrass performance.

This information is compiled from trial sites across the United States and Canada, where species and their many varieties (the tall fescue trials have more than 170 entries) are evaluated and their characteristics compared one against the others. Green industry professionals use the NTEP results to select the most appropriate turfs for the sites they establish and maintain.

The rating process drew its fair share of comment at the meeting. Evaluators at each location rate give each individual trial entry numerical ratings in categories such as color, spring greenup and density, among others. The ratings are based on visual inspection, which is admittedly subjective.

Several in the audience also sug-

Continued on page 22

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Paul Knulty, CGCS

Superintendent
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Genoa, Ill
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and fairways; Bentgrass greens

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Off The Fringe

Before You Grab a Cup

How many cups of coffee do you drink at the maintenance facility in the morning? You might be fooling yourself if you think coffee helps you perform better out on the golf course, according to a recent study.

Men who work alone may increase their stress levels by taking a coffee break in the belief that it will help them perform faster. But men who work in teams could feel less stressed after enjoying a sharp intake of caffeine, but this may make them less effective, according to a study by the University of Bristol in the United Kingdom. Existing theories suggest that caffeine consumption can trigger stress, but there is also evidence that it boosts confidence and makes people better able to perform various tasks. The Bristol research tried to reconcile these different perspectives. The research was sparked by an anecdote from a man taking part in a stress-management workshop, describing a trip to the United States with his small business team. During the trip, coffee was freely available, and the team overindulged. Within days, stress levels had escalated, and they believed that the extra caffeine had disrupted relationships. Aiming to test this theory, the Bristol researchers found that caffeine did indeed heighten feelings of stress while performing stressful tasks, but unexpectedly this happened especially in men. However, the effects of caffeine on performance were likely to depend on the type of task and whether participants were working alone or in teams.

"The commonplace tea or coffee break might backfire in business situations," a researcher said. "Far from reducing stress, it might actually make things worse."
 — Courtesy of Newswise




INGRAM PUBLISHING

Quotable

"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.



"I've never been to an event where there's been so many positive comments about the location."

— GCSAA CEO Steve Mona on San Diego, the site of this year's GCSAA Conference and Show.

AARON DELESIE

Princess 77 Provided Cimarrón Golf Course with the Cost Effective Solution for Their Renovation Project



Mario Aguiar, Golf Course Superintendent for Cimarrón Golf Course in Cathedral City, California kneels on a renovated fairway of Princess 77.

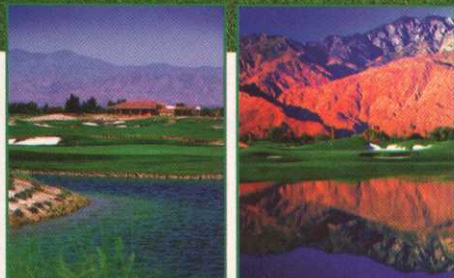


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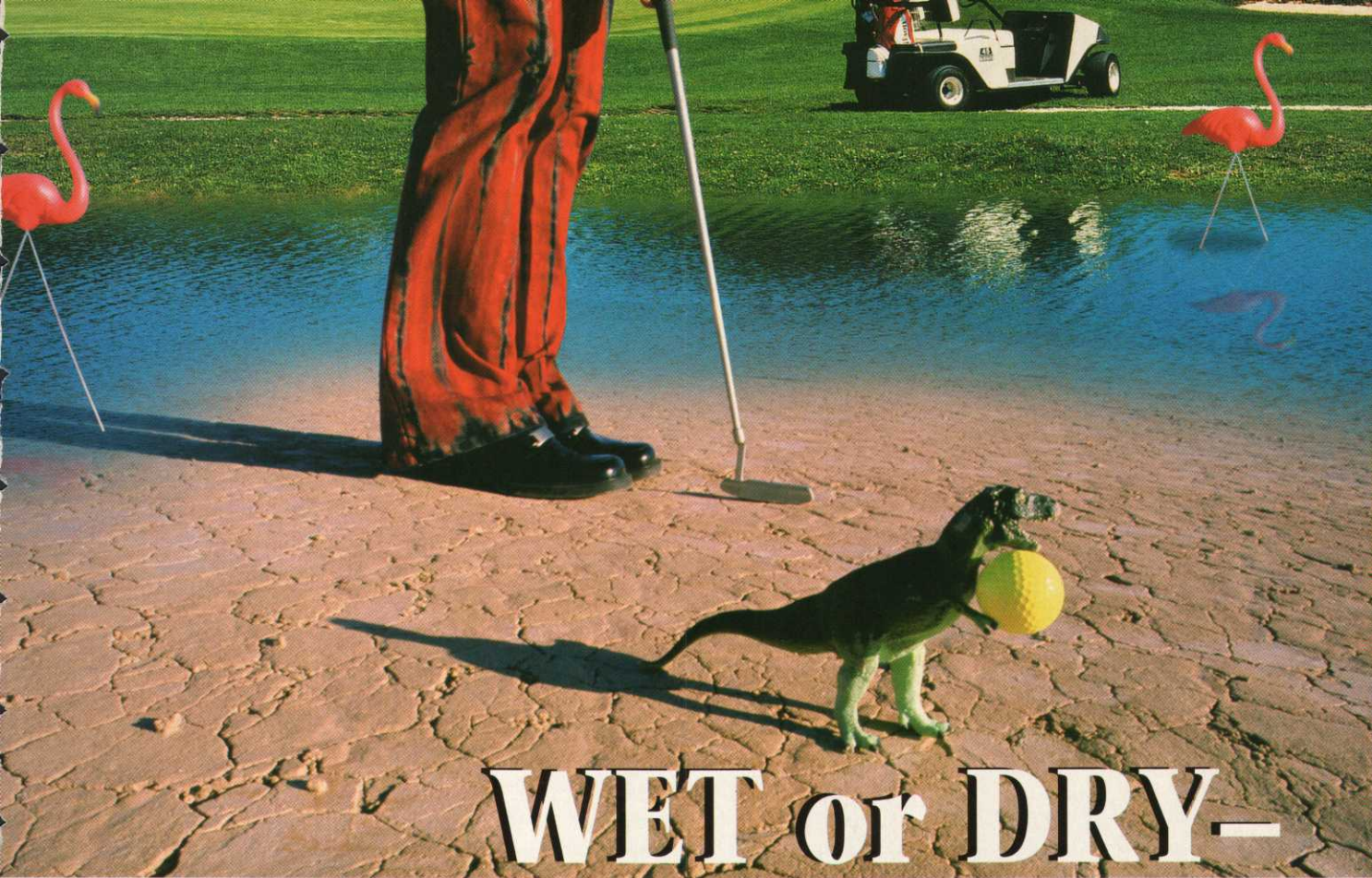



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*Response of Bermudagrasses and Zoysiagrasses to Applied Water Using a Linear Gradient Irrigation Design, Sean Reynolds, 2000, Master's Thesis



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Off The Fringe

Morrish Will Call It Quits

ARCHITECT, TIRED OF TECHNOLOGY RUINING THE GAME, HAS HAD ENOUGH. THAT'S UNDERSTANDABLE **A Commentary by Anthony Pioppi**

Jay Morrish has had enough. After 40 years in the golf course design business and more than 100 courses to his credit, he's getting out at the end of the year — and not because he wants to.

"I've had all the fun I can stand," he says, the sarcasm oozing through the phone lines all the way from Texas to Connecticut. "It's a mess. It really is. I'm disgusted with it."

What's taken the fun out of work for Morrish, 67, is the length the golf ball is flying these days, not just off the clubs of pros, but all golfers who regularly



Jay Morrish

hit it more than 300 yards.

Morrish isn't some hack who has been stamping out mundane work in his more than 40-year career. He is an accomplished designer with such well-regarded layouts to his credit as The Stone Canyon Club in Oro Valley, Ariz., and two he drew up with Tom Weiskopf, The Rim in Payson, Ariz., and Double Eagle Golf Club in Galena, Ohio. The pair also created Loch Lomond in Scotland, the first American architects ever to build there. Morrish also partnered with Jack Nicklaus from 1973 to 1983.

The quick and best and correct answer to Morrish's dilemma is for the

USGA to push back the golf ball. You know it. Morrish knows it, and the USGA surely knows it.

"It would be so simple to slow down the golf ball," Morrish says. "Let them keep playing with their clubs that look like they have mailboxes tied onto them."

No chance.

Morrish is concerned that the classic courses are being put out to pasture by technology. He seethes at the Titleist ads that mock architects and their desire to preserve those designs.

Somewhere Wally Uihlein is chuckling. Like the chairman and CEO of Acushnet, Titleist's parent company, cares what Morrish thinks.

"We're all in this together. I hope the tour will decide this is not good for the game," Morrish says, but knows better.

He tells a story of watching Phil Mickelson on television as he recalled his round: driver, nine-iron; driver, wedge;

Continued on page 20

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Off The Fringe

Continued from page 18

three-wood, nine-iron. No long-iron approaches. All short clubs. Ridiculous.

"The only hope is if people get bored watching it on TV," Morrish says.

As a result of the "advancements," Morrish has thrown his hands up in the air. He is at a loss on how to design in a way to defend against the long hitters without building 7,700-yard layouts.

How awful for someone so talented to realize the skill and artistry that made him such a sought-after architect is now somehow out of date and irrelevant.

The simplest of tasks have become impossible to achieve for him, like an accomplished guitarist not knowing where to place his fingers to play a basic chord. "I don't have a clue on where to put a fairway bunker," Morrish says.

Sad.

Morrish says he has one way to at least make a stand against length, and that is building six par 3s into every

layout (course owners who want a traditional par-72 layout scoff as his idea), which allows him to exert control to some extent. He did it years ago at a course in Flagstaff, Ariz., called Forest Highlands Golf Club to combat the length golf balls fly because of the elevation.

Given his druthers, Morrish would design one-shotters beginning at about 250 yards and working their way down in increments of 15 yards or so.

"I can at least make you hit six different clubs during a round of golf," he said. "The test use to be you had to hit 14 clubs during a round. Not any more."

The other accomplishment of six par 3s is that it allows for players of different levels to be using the same club into greens. A midhandicapper playing from the middle tees could be using the same club as a lower handicapper at the back tee markers.

Morrish has some business left before

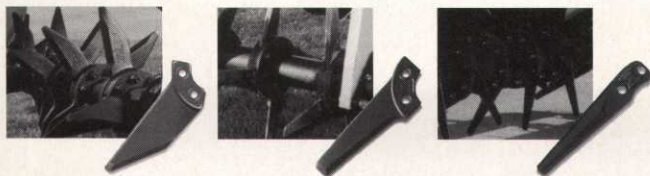
he goes. There are three courses in the works with his name on them. They will be his last. His partner, son Carter, will carry on what will then be a one-man business after his father departs.

Morrish intends to travel when he retires. Yeah, he knows that sounds crazy — someone who has spent the better part of 40 years on the road, wanting to travel. But now, he says, he is going to travel how and where he wants.

Driving through rural West Texas is high on his list, as is visiting New England to see the leaves in the fall. If he heads up this way, where I live, I hope we can get together and visit some of the classic courses.

Maybe we'll stop into the Titleist headquarters so Uihlein can look us in the eye and tell us technology isn't ruining the game. Maybe Morrish and I will look him in the eye and tell him he's a liar.

Pioppi is a contributing editor for Golfdom.



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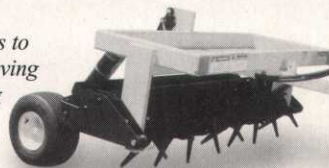
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