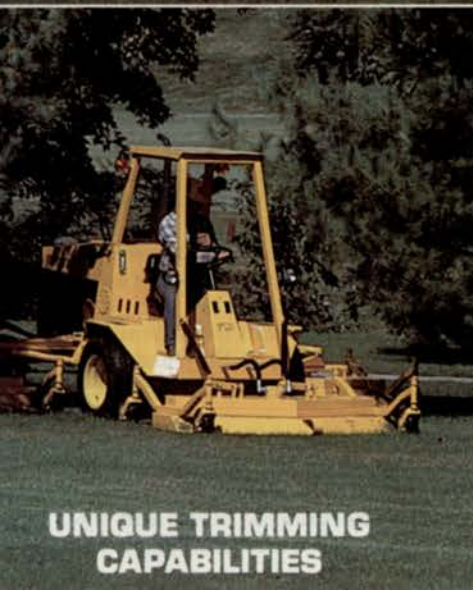


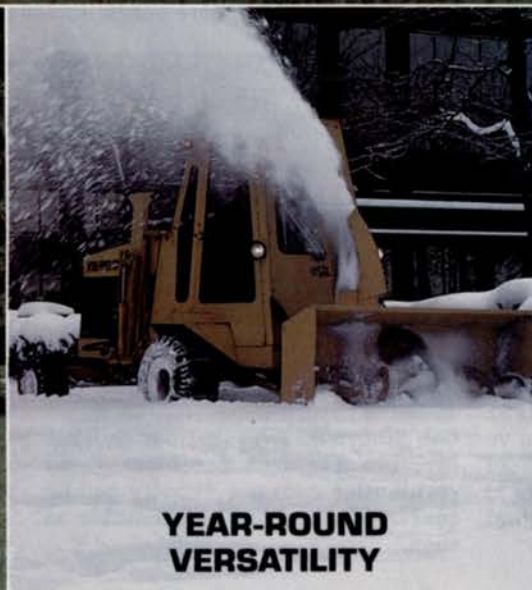
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when he sees the golf construction industry harken to the call for more courses.

"The industry recognizes the validity of the NGF's research, which indicates that there are some very strong golf markets out there," he notes, "and this is demonstrated by the number (of golf courses) under construction and recently opened."

### Financially speaking

California's Palm Springs area, long a premier golf mecca, has a thirst for more public courses that won't take a divot out of middle-income pocket-books. Bob Stucynski, superintendent at Ironwood Country Club in Palm Desert, notes that the surrounding Coachella Valley has only six or seven public/semi-public courses that charge from \$25 to \$50 a round. The yen for private, residential courses seems to be driven by developers' desires for quicker investment returns. Much of the thinking, according to Stucynski and other supers, is that with high land prices and no housing developments to provide extra income, the lag time before a public course can be successful is a million yards long. A public course built for \$2-4 million would take 10-15 years before becoming profitable, especially with low green fees.

"Even if you run 380 rounds through each day," reasons Stucynski, "you still have operational budgets (which will vary), depending on what condition you want the course to be in. Let's say your maintenance and pro shop operation costs \$2 million per year, with salaries. You've got to generate \$2 million worth of outside play. Where are you going to get the money to pay off the initial premium?"

### Public courses work

Funding is the biggest bunker to clear when it comes to development, and the combined resources of multi-investors can make it easier.

More private investors have to become aware of the money-making potential for new courses.

"No question about it," says Tom Haugen, of Stonebrook Golf Course in Shakopee, Minn. when asked if a public course can be a more profitable venture.

"You've got so many more people to draw from," states Haugen. "People don't like to play 20 rounds of golf at one place (as do members of a private club). It's an easy way to set up a golf course, with virtually no advertising other than to announce that you're open."

Jerry Lemons, superintendent at Tennessee's Old Hickory Country Club: "The business has been looked at by owners as an 'ego-driven' enterprise rather than one by which owners can profit."

How much money can a public golf course make? "If you can keep land

hire a lot of lawyers and environmental engineers, and face a two- to three-year permit process before you can even break ground. In many cases the privates have access to more financing, but that's a generalization."

But to some experts, the "members only" golf course is not an absolutely more profitable way to play the game. Golf course architect Michael Hurdzan serves as president of the American Society of Golf Course Architects. Hurdzan believes there is a mistaken belief that a golf course developed in tandem with housing must someday become a private course in



Florida golf course designers Lloyd (left) and George Clifton believe in an "absolute need" for more public access courses in the state, just as in the U.S.



Bob Stucynski says that, for quicker investment returns, developers build residential courses. Wholly public courses don't prove as profitable as soon.

and construction under \$2 million," insists Lemons, "you can pay for that course in five years."

But is it indeed that quick a return? According to Pat Jones, director of communications for GCSAA, a public course can be a hard row to hoe.

"It takes quite a bit of capital to work for two or three years in advance of construction," reminds Jones. "To go through the permit process, to complete environmental audits, and deal with the government, you've got to

order to exist profitably.

"Primarily," states Hurdzan, "golf development is in the golf resort and second home market. That doesn't mean the most demand is there; that simply means that that's the easiest way to develop."

According to Hurdzan, "20 percent of the people who buy homes in a golf course development play golf. The other 80 percent want the amenity of not having neighbors; they just want to sit on their patio (and enjoy the view)."

"We in the golf industry can make the boom continue for a long time," Hurdzan warns, "or we can kill it by charging too much and trying to put too many people on too few courses."

The average golfer needs the help of the golf course construction industry. A developer in suburban Chicago, for instance, says golfers at courses there constantly face long lines.

More groups of private investors looking for a long-term commitment are needed. Those who will build the course and manage it for a long term. It can be done, and is in the best interest of golfers everywhere serious about the game.

*continued on page 24*

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## TRUTHS AND CONSEQUENCES

Chemicals were favorite targets for environmentalists during the 80s. The future holds more of the same scrutiny.

"Be prepared," says Jerry Lemons of Old Hickory Country Club. "When there's a tragedy, it jumps out at us. That's when we in the business get hurt the most. Pesticides are guilty before proven innocent."

GCSAA's Pat Jones says resistance from persons who do not want to see a golf course built in their neighborhoods is a towering hazard many developers must clear to reach the green. And the best defense is to stay one step ahead.

"GCSAA's role," explains Jones, "is to educate the public, develop factual information and data, and prove to the public and government regulators that golf courses are safe places to be, are not damaging to the environment, and—if anything—are an environmental benefit."

Remembering the drought of 1987-88, superintendents want more sensitized irrigation systems that conserve more water. Systems are now hooked into weather stations that adjust the watering cycle based on daily evaporation rates; soil sensors corroborate with weather system information.

"We're seeing the trend to double- and triple-row irrigation," says architect Michael Hurdzan. "We're going to two or three systems of sprinkler heads around a green as well."

Lemons says the cost of lightweight mowers can outweigh the gains.

"On warm-season grass courses especially," he says, "wear and tear is not as critical as on bentgrass fairways. In the South, it's been one of those fads that has pushed down our way. You can still use the tractor-type mowers, and maybe go to a 10-bladed unit rather than a seven-bladed one."

"We've got 120,000 square feet of greens," says Lemons. "And we want to maintain high stimpmeter readings. Smaller triplex mowers are used on greens and approaches. We have Bermuda fairways, and we overseed with rye in the fall. By the time we get the Bermuda pumped up to take over the rye, we're on a five-day cutting schedule."

"The competition has forced us to lightweight mowing of fairways," says Brice Gordon of the Audubon Country Club, Louisville, Ky.

"You've got tremendous-looking courses out there," says Gordon, "thanks to the new varieties of grass and new equipment. It's a positive development. We now mow fairways six times a week at 1/2-inch. People want that quality."

Hurdzan also notices greens getting flatter, but not without drawbacks. "Lower cutting heights are due to less slope. They're mowing so close that if we put very much pitch to a green, the ball starts rolling too much. So we're forced to design flatter greens."

"Consequently, the flat greens don't have surface drainage. And shots don't hold as well, so superintendents are forced to over-water. Before, we could bank them. All the water goes through the soil profile, so we have more disease problems as a result of that."

The solution then is to increase the infiltration rate of greens, to dry them down.

Rolling mounds, wrap-around bunkers and elaborate water hazards have satisfied golfers' desires for challenging (some say impossible) shots and beautiful scenery. But design often becomes a game of one-upmanship, leading to time-consuming, costly maintenance.

Jones believes that with the heavy public demand for golf there follows a demand for relatively inexpensive tracks of \$2-4 million. "Without proper maintenance and a proper superintendent, the more expensive courses can be difficult to maintain. You might spend \$1 million a year to keep the place going."

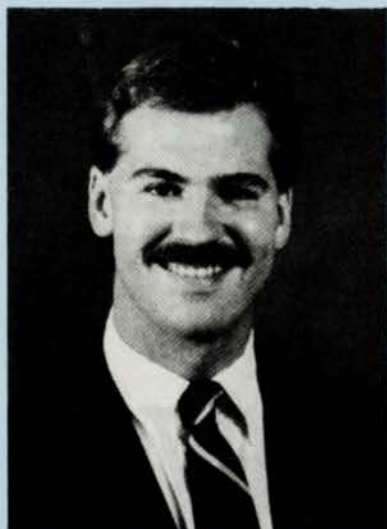
Lemons recently re-designed and rebuilt the greens and bunkers of Old Hickory Country Club in Tennessee. He believes that many current designs neglect maintenance concerns, and will frequently build huge mounds into designs "to keep up with the big boys."

Lemons asks, "How long can the course be maintained at the dollar figures that are received from public golfers? Big-name designers spend upwards of \$6 million, and often create nightmares for maintenance."

Lemons is using foresight. His concern is the capital required to maintain that look. "If the economy goes bad in the future," Lemons asks, "can we afford million dollar maintenance budgets?"

The answer: "Design for maintenance, and realize that form follows function."

—Terry McIver □



Pat Jones



Michael Hurdzan



Brice Gordon

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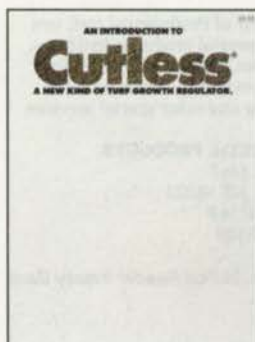
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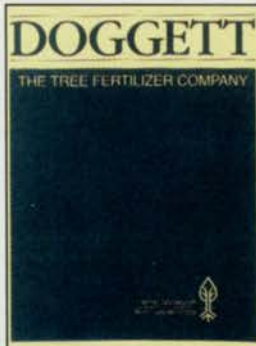
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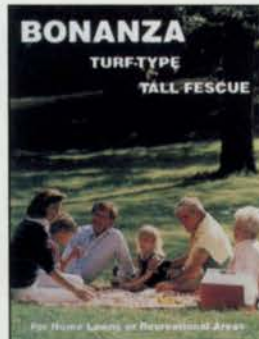
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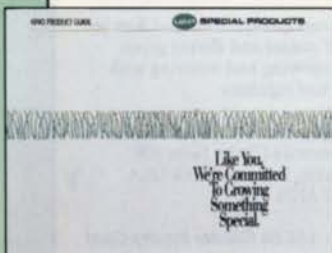
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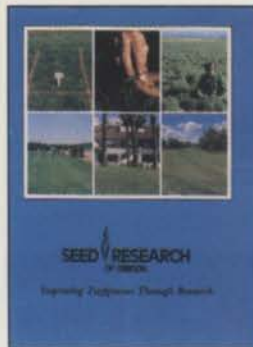
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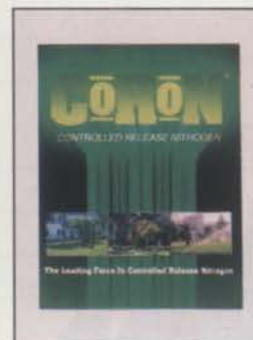
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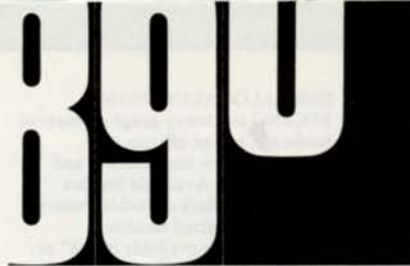


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# DOUBLE YOUR MONEY:

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**R**apid growth for the landscape industry will continue into the next decade. Opportunities exist for the industry to double in the next three years or sooner. Being able to secure some of this available business will mean that you need to develop your management to take advantage of the growth.

What is the outlook for 1990? Is this an industry where diversifying companies are likely to expand? Will it be an industry where new companies can find an opportunity? What will happen to the quality of service as the industry expands?

## Residential, commercial

Residential occupants are getting tired of spending time maintaining their properties externally. In addition, residential customers of chemical lawn care companies are starting to consider outside contractors to perform the rest of their landscape services. These non-commercial customers are realizing that, if they are to have multiple property services performed on their landscape, it can be cheaper and more effective to have

Our intrepid business expert peeks into his crystal ball and sees up to 40 percent—that's right, 40 percent!—growth in the landscape market within the next year.

by Ed Wandtke

only one service company.

In the commercial sector, companies that had been maintaining their own property are starting to turn to professional service companies. This is happening because of expanding pesticide regulations. Companies do not want to worry about liability issues derived from applying pesticides. Also, many businessmen believe that an outside landscape company can do the job better and cheaper.

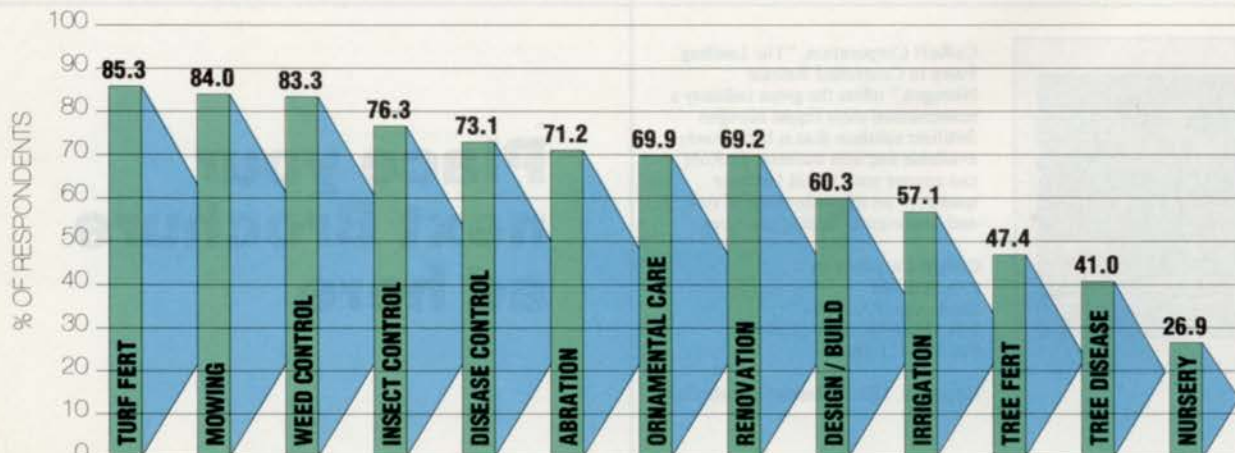
Increased growth, then, will come from first-time customers and more residential and commercial customers seeking outside professional landscape services. A 25 to 40 percent

growth in the entire landscape services market over 1989 levels is not out of the question.

## New entries

With this growth will come many new companies. If 1989 is an indicator of the potential quantity of new companies in the industry, most markets could double in size. While many of these new companies often tend to lower prices for a while, most go out of business if they are not providing the service above cost. For most U.S. markets, the failure rate of these new companies is often more than 50 percent. These companies often do not fail because of under-capitalization

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# 390

*Landscaping allows a company the opportunity to self-destruct because it took on more work than it could reasonably expect to service.*

but rather because of management incompetence.

Seeing an opportunity in the landscape industry will not assure a start-up company that it will make it. As a matter of fact, customers will cancel landscape services because they failed to provide on a timely basis the only item they are selling—"service." Like many industries, landscaping allows a company the opportunity to self-destruct because it took on more work than it could reasonably expect to service.

Since there is no licensing requirement to provide landscape services, there is no effective method to police the industry. This may change in the future, but for now there are almost no barriers to any individual wishing to enter the landscape industry.

Many companies currently

providing some lawn care or tree services are starting to look at expanding into landscape maintenance. ChemLawn and Tru-Green, for instance, are testing the possibility of offering landscape maintenance services. And their tests will probably tell them there is an opportunity to enter this lucrative market because it is not now being fully serviced. In addition, with chemical lawn care industry's slowdown during the past three years, many companies have diversified into the landscape or tree service industries because of their larger untapped market segments.

#### **Quality control**

As the number of new service providers continues to expand, it will become important to somehow establish a determination of service qual-

ity. In professions like plumbing or electricity, there is a formal training sequence needed to acquire enough knowledge to perform the work. At the end of the formal training program, the individual is then licensed as a master electrician or plumber.

Such a system needs to be developed for the professional landscaper if there ever is to be some assurance—on a state, regional or national basis—that landscapers are truly "professional" and command the fees of a professional.

Quality control in the landscape industry is a very subjective notion. Even within a company, the level of quality provided customers differs significantly. If your company does not have written standards of appearance together with pictures of what the standards mean on a property, 1990 is definitely the year that you

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# 390

should put such a quality control system in place. If you do not, you will learn of customers' dissatisfaction with your quality when they cancel or do not renew a contract.

## New offerings

For many years, landscape maintenance has meant mowing, edging and cleaning sidewalks and driveways. Today, consumers are asking their landscapers to do more:

- vacuum parking lots,

- aerate lawns,
- mulch decorative beds,
- provide vegetation control in beds,
- design and install flowering enhancement to their properties,
- prune small shrubs and trees under 20 feet,
- renovate part of a lawn that has been damaged,
- install and maintain irrigation systems, or
- re-do plant material that has become overgrown or just needs a new look.

Opportunities continuing to expand, and often are limited only by you not realizing that you could be providing the service.

So make a point of examining the opportunities and evaluating your

abilities to effectively deliver the services.

## Beyond 1990

As new equipment continues to be developed, man and equipment will be more efficiently mixed to service customers. Today there is entirely too much labor needed to service landscape properties. That will need to change. In the future, property owners might ask you to design the property service, and then to provide those services. A standard of property management service for commercial sites might be developed on a national basis with individuals modifying the standard based on their budget.

Start looking at what property management associations are asking for, and work with them.

# GOVERNMENT: PLAYING ENVIRONMENTALIST

Landscapers in the public sector have a lot to gain by educating the public on the importance of their work.

by Will Perry, managing editor

In many respects, landscapers in the 1980s never had it so good.

In this decade, the green industry has seen an avalanche of new and improved products that kept the lid on labor costs and bolstered the bottom line.

Two-cylinder, air-cooled engines; front-deck, hydrostatic mowers and the inventive use of hydraulics has made good turf equipment even better. And that equipment now borders on greatness, as manufacturers put more emphasis on operator-friendliness. More comfortable seats, better maneuverability, and improved speed and visibility continues to have a favorable, if immeasurable, impact on employees.

Chemicals too, have allowed landscapers to manage acreage that in the past would have been too substantial for today's smaller crews. The specificity of today's herbicides and

pesticides allow landscapers to better pinpoint targets, reducing rates while improving efficacy. Biologicals and integrated pest management (IPM) are making their presence felt as well.

## Chemophobia's future

So what do landscape managers in the government sector have to worry about? Well, how about "chemophobia" or today's tax rollback climate?

"To be honest I don't think the future is too bright," says Allan Shulder, executive director of the Professional Grounds Management Society. Shulder says popular citizen movements to hold the line or reduce taxes (such as Proposition 19 in California) are a threat to government sector landscapers, since landscape management is too often regarded as an expendable municipal program.

"We're usually the first to go," says

Shulder. "I can't explain why that's the case, but it is. Right now, the climate in this country is to hold the line on taxes or cut them back. I'm not opposed to that personally, but when that happens our services are cut."

Other landscapers, particularly those caring for universities or school districts, are more optimistic. Jack Coffman, of Margaretta Local Schools, Ohio, says school board members today are more aware of the importance of well-landscaped building exteriors. "I've been getting real positive feedback for what I've done here," says Coffman. "The board realizes that only about 30 percent of the voters in this town have kids in the schools. The other 70 percent make up their minds about the quality of the schools by other means. By seeing well landscaped buildings they develop positive feelings about the school system."