

Issue 8 | Fall 2011

BY DESIGN



Excellence in Golf Design from the American Society of Golf Course Architects

Changing the scene

How ASGCA architects are helping to reposition golf

Also: ASGCA membership by the numbers • Lessons from the ski business • China • Bunkers



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Like it or not, change is inevitable. We must change with the times. The golf industry, as traditional as it is, is not exempt from the changing times. As such, golf course owners and operators must continuously alter their business models and management methods to deal with the new circumstances in which they find themselves.

When a golf course's business model is changed, it's hardly surprising that the golf course itself—the facilities greatest asset—must be remodeled, too. Across America and the world, ASGCA member architects are helping clubs and owners to refine their courses to suit the economic environment of today, and of tomorrow. Read our cover story on golf course repositioning to find out more.

Even in a golf market as young as China's, renovation and repositioning of golf courses is happening. At this year's ASGCA Annual Meeting in Denver, members heard from Chinese golf industry leader Ernie Wang on the state of business in his country. A summary of his report, and of several of the excellent presentations given at the meeting, can be found in our 'Lessons from Denver' feature.

When planning the Denver meeting, and the golf that went with it, I wanted members and guests to see some of the excellent public courses we have in the area. Public golf is central to the game's development, as it allows new players to access the game. Joe Steranka of the PGA of America told ASGCA members that seeming unwelcoming to beginners is a major problem for golf's image. It's something we all need to work on.

Yours sincerely,



Rick Phelps, ASGCA
President
American Society of Golf Course Architects

BY DESIGN

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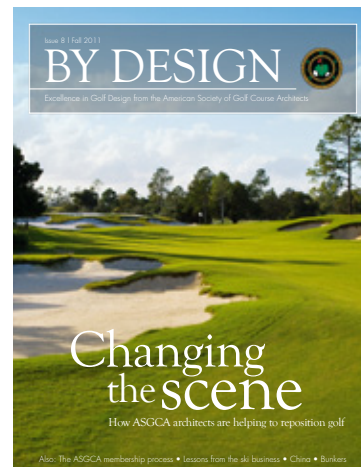
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COVER



Deltona Club, Orlando

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Ryder Cup

Albatros set for 2018 Ryder Cup

A course co-designed by two ASGCA members has been chosen to host the 2018 Ryder Cup.

Le Golf National Albatros, which was designed by Rick Baril, ASGCA and Mike Smelek, ASGCA; in collaboration with the late Robert Van Hagge and French architect Hubert Chesneau was designed as the permanent home of the French Open.

"We designed Le Golf National with the vision that one day, it could, indeed, host the Ryder Cup!" said Baril. "We developed the course in a very dramatic fashion, where the final four hole 'gauntlet'—15, 16, 17 and 18—can all feel the drama. This all materialized from a flat featureless field, to chaos, then to



The Albatros course was previously a flat, featureless field

the final magnificent course that was 100 per cent pure fabrication and collaboration.

"I know Bob von Hagge (who died in 2010) would have been thrilled," he added. "He always said, 'The true reward will be the recognition we receive.' And

now, hosting the Ryder Cup truly renders that reward!"

The course, which is capable of holding more than 70,000 spectators, will be just the second to have ever hosted the competition on continental Europe, after Club de Golf Valderrama in Spain in 1997.

Watson inducted

Tom Watson was inducted into the ASGCA at the 65th Annual Meeting in Denver. Watson's firm has created designs around the world, including the Cassique course at Kiawah Island in South Carolina and the Independence course at Reunion Resort in Orlando.

Rain Bird film awards

Rain Bird's fourth Intelligent Use of Water film competition has honored three winners at its screening in Beverly Hills, California. The ceremony, which was hosted by Jack Hanna, gave out three awards: by the jury, the audience and green industry professionals.

Golf Industry Show

The Golf Course Superintendents Association of America (GSCAA) and the National Golf Course Owners Association (NGCOA) have announced that San Antonio will be the venue for the 2015 Golf Industry Show. This will follow visits to Las Vegas, San Diego and Orlando in 2012, 2013 and 2014 respectively.

Programs to be launched in China

The Golf Course Superintendents Association of America is to launch some of its educational programs in China. GSCAA, which has become a partner of two leading Chinese golf shows, will work with organisers Reed Guanghe to conduct educational events at the Asia Golf Show and China Golf Show.

Development

Cuba opening up to golf development

The Cuban government appears to be reversing a hard-line stance it made against golf courses 50 years ago.

When Fidel Castro originally gained power, in 1959, one of his first acts was to get rid of all golf courses in Cuba, which, at the time were seen as being against socialist principles.

However, in an unprecedented move, the administration has given preliminary approval to four new golf resorts, the first of more than a dozen that are in the pipeline.

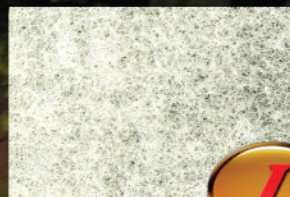
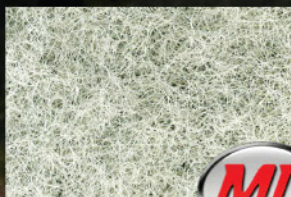
The four projects total more than US\$1.5 billion, with the government due to take an approximate 50 per cent cut in the profits. Tourism benefits to Cuba's economy are also likely to have influenced the new policy.



Cuba is set for four new golf courses

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Master Planning

Fall the time to master plan

Fall is the perfect time to evaluate a golf course and develop a master plan for improvements, says Rick Phelps, ASGCA president.

"Golf courses everywhere are subject to standard wear and deterioration, while others were damaged by floods or scarred by drought this year," Phelps said. "That makes this a particularly good time for golf course management to review what needs to be done before the next golf season—and those that follow."

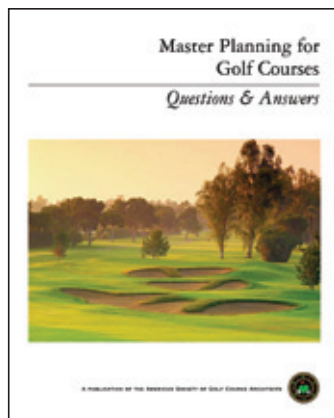
His points, which are included in the 'Master Planning: Questions and Answers' brochure, published by ASGCA, are aimed to help golf course managers, superintendents, professionals and owners understand the process of developing a master plan and the importance of assessing



the typical life expectancies of golf course components.

Phelps is hopeful for developments to be made in the creation of family tees, turf reduction leading to water and maintenance savings, irrigation system consultation and aesthetic and functional advances to the practice range.

The free brochure is available at: <http://www.asgca.org/free-publications>



Course length

Positive results for Tee It Forward

Results following the first year of the Tee It Forward campaign have been extremely positive, according to a survey looking into the success of the initiative.

The program, which has been supported by the PGA of America and the United States Golf Association, encourages faster play and more fun with tees best suited to a players' ability.

According to the results: 70 per cent found golf more enjoyable, 91 per cent were likely to recommend the scheme to a friend and 52 per cent said they were likely to play golf more often knowing that they could use Tee It Forward.

A separate survey, conducted by the PGA,

said that 86 per cent of the facilities that trialled the scheme said they would be continuing to use it.

"We are extremely pleased with the initial results from golfers using Tee It Forward," said PGA of America president Allen Wronowski. "Golfers told us that they had a positive experience. It was our hope that by moving to a different set of tees, golfers would have a more enjoyable, relaxing and fun experience—that certainly appears to be the case."

Find out more about the program results at: <http://www.usga.org/news/2011/August/PGA-Announces-Results-Of-Tee-It-Forward>

Toro introduces Workman

Toro has launched the new Workman MDX-D, the company's first mid-duty utility vehicle with a diesel engine. The firm says that the new unit provides powerful performance, greater fuel efficiency and operator comfort with a payload capacity that is one of the highest in its class.

Boom in Thai golf tourism

The value of foreign golf tourists to the Thai economy is expected to hit \$2 billion in 2012. The figure, which is based on a forecast by the local tourism authority, predicted a record 19 million inbound visitors next year with 600,000 of those being golf tourists.

Wind power

Whitehead Golf Course, Northern Ireland, is beginning to see a return on a \$156,400 investment it made in 2009 on two 15 kW wind turbines. The course is now set to make approximately \$20,339 per year from the investment in saved electricity bills and government incentives.

China firm in Iceland

Chinese businessman Huang Nubo is trying to buy 300 sq km of northern Iceland, with plans for a wilderness tourism development, including golf facilities. According to reports, the land sale has been agreed and is waiting on government approval to compete the deal.

Repositioning | Adam Lawrence

Changing the scene

Across the world, golf course markets are changing. Adam Lawrence looks at how golf architects can help owners find the right solution to match their new requirements



Everyone in the golf design, development and operation business knows that a golf course is a living entity that changes over time, and needs work every now and again to keep it looking fresh and performing well.

But what not so many realize is that the same is true for a golf business. A business model that was highly successful twenty years ago may not be ideal today, and a proposition that seems crazy at the moment could well be the perfect solution in the future.

When an owner or operator realizes that a change of business model is needed, the likelihood is that the golf course will need to be changed to match. Characteristics that suit a

private club with a small membership may well not work well if the course is to become a daily fee operation, looking to maximize rounds. Even changes to the facility that, at first glance, shouldn't affect the golf course may well have an impact. If you need to expand your clubhouse because you are moving from private to public, is there room in the original land plan, or will golf holes have to be changed to accommodate the bigger building?

Golf courses around the world are facing this kind of question all the time. Course changes are needed for many different reasons, and the ideal solution for each will be wholly dependent on circumstances. In markets where land values are strong,

for example—such as Ireland a few years ago and Australia today—a number of old-established golf clubs, located in relatively urban areas and thus sitting on extremely valuable real estate, have concluded that selling their existing course to a developer moving to a new, out of town site and building an entirely new course is a good way to secure their future. Some of the deals that have been done are mindboggling, with clubs finding their property's value to developers is enough to buy a new site, construct a golf course and associated facilities and still have a large sum of money in the bank for a rainy day.

In difficult economic conditions, of course, this kind of solution is likely



Newport National in Rhode Island was originally planned as a private club, but is now the top public access facility in the state

to be rare, and courses are more often looking to find ways to increase revenue or cut costs. Some, sadly, are being repositioned right out of business, and being turned into public open spaces, housing developments or office and retail parks. But in many cases, owners and operators are working with golf architects to change their course to make it more suited to a different business model, often with remarkable success.

One solution that has been popular in many different locations is to redesign the golf course in order to carve out a parcel of land that can be used for residential or commercial development. There are many examples of such projects that have been completed, and

lots more currently being considered. “We’re currently working on a project to change a par 35 nine hole course to par 31, to accommodate a substantial brownstone and townhouse development,” says Arizona-based architect Forrest Richardson, ASGCA. At the Deltona Club, near Orlando, a successful project a few years ago saw Bobby Weed, ASGCA entirely redesign the golf course. Weed’s dramatic redesign made use of the site’s natural sand to create large, dramatic waste-type bunkers, significantly increasing the course’s visual appeal; the project was named Florida’s best restoration for the year. On top of this, the redesign created a 17 acre parcel of land within the site for development; this

land was used for 300 age-restricted condominiums, transforming the economic position of the club.

Another solution—especially relevant today given the demand for alternative golf facilities that has been chronicled in previous issues of *By Design*—has been converting courses into practice facilities, executive courses or similar. At the North Olmsted Golf Club in Ohio, originally opened in 1946, a redesign led by ASGCA Past President Bill Amick saw the course shortened from a conventional length nine holes to an executive course of 1,702 yards, playing to a par of 30. Amick’s project enabled the developer to free up land for constructing and selling



Bobby Weed, ASGCA, reinvented Orlando's Deltona Club

housing, which has been successfully completed, and the course has been passed over to the ownership of the Northern Ohio Golf Association.

Often, course repositioning happens because of a change of ownership. A classic example of this is at Isleworth in Florida, where after Tavistock Group bought the property, architect Steve Smyers, ASGCA was brought in to redesign the course, which had originally been designed by ASGCA Past President Ed Seay and Arnold Palmer, ASGCA.

Architect Jeffrey Blume, ASGCA, is becoming something of an expert at this kind of project. At the Quail Valley Country Club, in Missouri City, outside Houston, which hosted Shell Houston Open in 1973 and 1974, Blume led a renovation project that has played a major role in the rebirth of a dying course. "Quail Valley was set to become a housing development until the city stepped in to acquire the property through eminent domain and convert it from a private country club into a municipal golf course," Blume says. The city paid \$7.4 million for the club, funded Blume's \$5 million renovation, and is now investing another \$7.5

million to build a new clubhouse and community center.

Blume reshaped the greens and bunkers of the 1970 course, with the aim of creating affordable municipal golf that could compete with the local daily fee courses. By increasing the gradient of some areas on the course, Blume's project improved the previously ineffective drainage, creating four new lakes around the property to contain runoff. The course is now ranked top affordable public course in the Houston metropolitan area.

The upshot has been that the neighborhood around Quail Valley, previously in decline, has been revitalized, to the extent that the project received the Houston Business Journal's 2010 Community Impact Award. "We have resurrected a community rather than just renovating a golf course," says Blume.

The upscale private golf club model is appealing to commercial developers, as, if the project is a success, the initiation fees paid by members will enable investors to get a fairly rapid return on their money. But it is risky for all that; when times are tight, persuading potential

members to part with large sums of money to buy their way into a golf club can be difficult.

That's why, across the US, there has been a trend for private clubs to be converted into semi-private or even daily fee operations in the last few years. Sometimes, this process requires course changes as well; what's ideal for a low-key private club is unlikely to be suitable for a busy pay and play operation.

Newport National Golf Club in Rhode Island is an example of how successful this kind of change can be. Opened in 1991, and designed by ASGCA Fellow Arthur Hills and his then associate, Drew Rogers, ASGCA, Newport National was envisioned as a private facility through planning and development, and remained that way through the early years of operation. But membership sales were slow on the take, and ultimately a decision was made to open the course to the public. Now, Newport National is the top public access course in the state.

"Very little has been done to the course through the years—it is being conditioned at the level that was



initially envisioned,” says Rogers, who continues to consult at the course today. “The course is much the same, primarily because of the simplicity of the original design. It was built with on a modest budget, with little earth movement, and the simple contouring promotes firm and fast conditions, which was necessitated because there was not much water available for irrigation. So we have a simple irrigation system, double row, and selected turfgrasses that fit the conditions.”

And, occasionally, things go the other way. At Houston National in Texas, which had been struggling for some time, local businessman Robert Steele bought the property last August. Formerly a 27-hole facility, Steele hired Jeff Blume to add another nine holes, making the club’s south course into an eighteen hole layout. Which they then launched as a private club! Opened in September, the new, private Sterling Country Club at Houston National already has 250 members, and is going from strength to strength. ●

For more information on repositioning or to find an ASGCA member near you, visit: www.asgca.org/members

CASE STUDY: THE TRANSFORMATION OF SAIL HO IN SAN DIEGO

In San Diego, the Sail Ho course, created by the U.S. Navy in the 1920s, has been transformed as part of a large-scale redevelopment project run by the city. The course was part of the now-closed Naval Training Center. After the closure, the Spanish style historic buildings along the waterfront and the Sail Ho course were turned over the city for redevelopment into a new 460 acre mixed-use community, now known as Liberty Station. “The renovation of

this great little nine hole short course, and opening it to the public, has created a wonderful golf facility for the community,” says local architect Cary Bickler, ASGCA, who led the renovation of a course he has played since his childhood. “It’s very popular, in part because it’s affordable and fun. Everyone can play from grandchildren with their grandparents, to advanced skill level golfers who drop by to play a quick round to tune up their short game.”



Cary Bickler, ASGCA led the renovation of the nine-hole Sail Ho course he has played since childhood, originally part of a now-closed Naval facility

The meaning of membership | Marc Whitney

An evolving market



Photo: Joann Dost

The recently-open Whistling Rock course in South Korea, designed by Ted Robinson Jr, ASGCA

Return on investment drives everything from multi-million dollar business decisions to the appliance purchases made by the average homeowner. Golf courses are run in the same way and owners and operators will always seek a strong return on their investment when designing or redesigning their properties.

How much should I spend? What short-term and long-term benefit will be gained from the work done and the person hired for the job? How strong is the working relationship between staff and the person hired? These questions and more must be taken into account when balancing a project's needs.

When it comes to selecting an architect to assist in a project, there have never been more options. Whether from various professional backgrounds, years of experience, successful projects brought to fruition

or simply the wherewithal to speak professionally to everyone involved—from superintendents to city council members—how does anyone know which architect is correct for the job?

When Donald Ross and thirteen others formed the American Society of Golf Course Architects (ASGCA) 65 years ago, they could not have imagined the business climate which exists today: golf played in some of the most remote corners of the world and an international cross-section of professionals designing the courses played on. And yet, the structure they put in place continues to serve not only for the ASGCA, but for golf industry professionals around the world, who know what to expect when they hire someone with the ASGCA designation following his or her name.

The international component of an association—despite having ‘American’ in its name—has never been greater or

more important. Members who have experienced the economic ebb and flow of previous decades (as opposed to just recent years) have seen the ASGCA take on greater significance.

Gary Linn, ASGCA, has worked as a golf course architect for more than 30 years and serves as ASGCA membership committee chairman. He has seen firsthand the increased positive impact ASGCA members are having around the world. “We are the ‘American Society’ but are truly a worldwide society based in North America,” says Linn, and the numbers support his statement.

A recent ASGCA survey displays the breadth of member influence around the world. Current ASGCA members have been part of projects in 92 different nations, from Australia to Qatar and Kazakhstan to Vietnam. On average, an ASGCA member has worked in six additional nations

“Any meeting involving ASGCA members means I am going to bring back some concepts which will help our company and clients

Todd Quitno, ASGCA Associate, Lohmann Golf Designs

outside of North America. But new business is built on quality not quantity. Each project is impacted by the individual architect's past work.

“In some parts of the world ASGCA is better known than in others,” Linn continues. “But it is the work you do and the reputation built over time which matters most to decision makers.”

Linn maintains that the nature of ASGCA membership practices set a tone that is still respected in the golfing world. ASGCA applicants have their courses reviewed and rated by current members, who report back to the rest of membership before voting on admission takes place.

“The oversight of fellow architects and members looking at courses means a great deal,” Linn explains. “An applicant has to not only produce a body of work, but meet a standard of design excellence which illustrates a depth of knowledge.”

Becoming an ASGCA member is a milestone for golf course architects, but is not the end of the line. Members share the drive and desire to continue their professional development through their own work, and continue their professional development, often through joint educational efforts shared with other members.

ASGCA President Rick Phelps notes the personal desire and professional expectation for education among ASGCA members exists year round, and often extends outside the association.

“In the last decade there are tools available to members far beyond what we have had in the past,” Phelps says. “Besides the ASGCA Annual Meeting which always has a strong educational element, there are webinars, multi-day seminars and conference calls sharing news and information.” Regular webinars may include participation from industry partners like the Golf

Course Superintendents Association of America or Major Partners including Toro, JacklinGolf, Rain Bird and Profile Products.

“I hope my education in this industry never stops,” says Todd Quitno, ASGCA Associate, who works alongside ASGCA Past President Bob Lohmann at Lohmann Golf Designs. “I am always looking for opportunities to learn something new and become a better problem solver. Any meeting involving ASGCA members means I am going to bring back some concepts which will help our company and clients.”

Being a leader also means seeing opportunities before others, and providing options to your customers. Throughout his presidency, Phelps has highlighted the 95 percent of courses which are not created for championship play, but rather for pure enjoyment of the game. ASGCA members lead the way in designing shorter courses, multiple tees and ‘family friendly’ facilities. Past President Bill Amick, ASGCA Fellow, is one of many members designing smaller courses which can be just as challenging, fun and rewarding as longer courses. “Today we need more, smaller courses,” he explains. “They are easier to maintain, faster, less expensive and easier to play for beginners and families.”

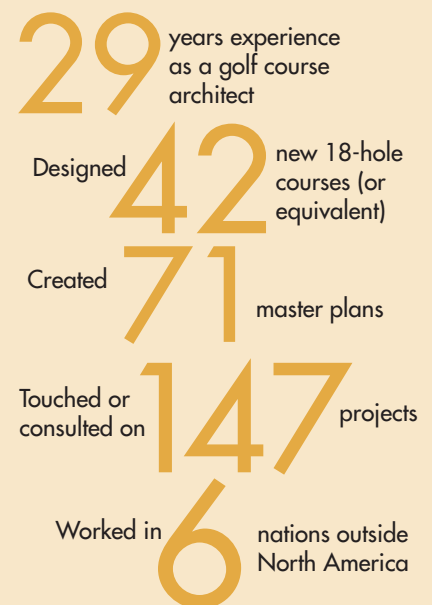
Andy Staples, ASGCA Associate, sees the collegial benefits of membership, but also knows ASGCA is about members doing good work. “If ASGCA is to continue holding its weight, its members have to produce the best work,” he says. “We need to keep focus on the truly great work from members and motivate the best future architects to join and get involved in the association. Education and promotion will continue to be the keys to the future.”

Even the idea of competing against fellow members in a challenging design market does not deter Quitno. They are competitors, of course, but I don't view the members that way,” he explains. “We still bounce ideas off of each other, commiserate about the industry and generally have great friendships.” ●

ASGCA BY THE NUMBERS

ASGCA recently conducted a survey of members concerning their professional experience. How does the members' breadth and depth of experience translate in numbers?

On average, an ASGCA member has:



ASGCA members have designed courses in 92 different countries around the world, from Australia to Qatar and Kazakhstan to Vietnam. As a comparison, the 2010 Winter Olympic Games in Vancouver, British Columbia welcomed athletes from 82 nations.

Lessons from Denver

ASGCA Annual Meeting, though a relatively close-knit gathering, attracts a selection of high quality guests from around the golf business. As such, we thought it worth sharing brief summaries of several presentations from this year's meeting, held in Denver. This short snapshot can't cover everything that was discussed, but we hope the insights

provided will be of value to developers, operators and golf clubs alike. In particular, the material from Joe Steranka of the PGA of America will be of direct interest to every US golf operator, and Michael Berry's presentation on the growth of snow sports contains some fascinating insights that could be of benefit to the golf business. ●

ERNIE WANG: THE CHINESE GOLF MARKET

Chinese golf entrepreneur Ernie Wang gave meeting attendees a summary of the current state of the industry in his country. China's golf business moves so fast and is so difficult for outsiders truly to understand that the views of an insider like Wang—the creator of the Chinese editions of *Golf* magazine and *Golfweek*—is especially precious.

Wang said that **52 golf facilities—equivalent to 60 eighteen hole courses—opened in China during 2010, bringing the country's total to 395 facilities, or around 490 eighteen hole courses.** The annual growth rate of 13.5 percent is

relatively consistent with the last few years.

Wang's statistics, which he accepts are incomplete, showed 172 projects under construction across the country. Most are in already developed provinces, such as Hainan, Yunnan and Shandong, but the focus has switched from the largest cities to second and third tier cities. Wang said he expected the proportion of projects in smaller cities to continue increasing.

Expansion and renovation of existing facilities is gaining pace in China. Wang said he was aware of thirteen expansion projects and at least sixteen renovations, suggesting that the boom in new courses

is already forcing older facilities to upgrade to stay competitive. There are now more than a million golfers in China, while the population core of golfers, those playing more than eight rounds of golf in a year, has reached 333,000, an eleven percent increase on the previous year.

Urbanisation remains a huge trend in China, with millions flocking to the cities each year. There are now more than 100 cities with a million or more inhabitants in the country. The country now has more than 400,000 millionaires, and, Wang said, these people are starting to focus on quality of life issues.



Clearwater Bay, China, one of 395 golf facilities now open in the country

MICHAEL BERRY: LEARNING FROM THE SKI INDUSTRY

Michael Berry for the National Ski Areas Association discussed how the snow sports industry has gone about growing participation in recent years. The industry has been transformed in the last decade, with gross revenue growing over 30 percent since 2001/2, a track record the golf industry should be keen to learn from.

Berry's ten lessons included the importance of having a model that quantifies the impact of trial and conversions. NSAA's model shows that ten percent of visits to ski areas come from beginners, 63 percent from those considered core and 27 percent from 'revivals', those who have been before but lapsed. Recent increases have largely come from this group, a message of obvious importance to golf, which has a similar large number of lapsed participants.

Bottom-up growth initiatives, Berry said, work better than those imposed from the top down, while understanding the motivation of beginners helps to



predict how likely they are to become regulars. Price, while important, he said, is far from being the only, or even the central factor in visitors' perceptions of the value of their experiences.

Understanding demographic changes, and their likely impact on the business, pays off in both the short and long term, he said. What people want from their leisure activities changes during their lives,

and this is key to planning. Managing this process has helped the snow sports industry boost participation among core users. Finally, Berry said, the industry has realized that business areas such as equipment rental and snow school are not just key to beginner conversion, but are vital revenue generators in their own right: a message with obvious resonance for the golf industry!

JOE STERANKA: THE GOLF 2.0 ROADMAP

PGA of America CEO Joe Steranka talked about the organization's Golf 2.0 project, a roadmap that aimed to see the American golf sector grow from its present level of 27 million participants and around \$33 billion in revenue to 40 million and \$40 billion by 2020. The plan segments involvement with golf in many levels, from the most basic—watching golf on TV and playing golf video games—to those that regularly play eighteen hole rounds. The middle tiers of this pyramid, above mini golf, but below regular participation in 'real' golf, is currently underserved, but, Steranka said, are being filled by new concepts such as TopGolf.

The key area for growth, Steranka said, is lapsed golfers. There are 61 million people in America who have played golf, are not doing so at the moment, but are interested in starting again; this, he said is the obvious focus for golf marketing.

Golf 2.0 has three pillars: retaining and strengthening the core, engaging the lapsed and creating interest in non-traditional groups. The second pillar will focus on making the game more attractive to women, creating 'welcome back' programs for lapsed players and targeting children and families.

Alternative golf formats are, Steranka said, vital to providing a ladder of opportunity by which people can progress from a basic engagement with golf to becoming a regular player. As well as the obvious messages of cost and time, the PGA's research has identified a number of reasons specific to why individual demographic groups don't play more golf. Spouses that don't play and a lack of welcome for beginners were mentioned by many groups, creating obvious opportunities for programs that could boost participation.

RICK BARIL: A DIFFERENT APPROACH TO BUNKER MAINTENANCE

ASGCA member Rick Baril spoke about his design of the recently-opened Stensballegaard Golf in Denmark. The design included some large areas of sand, with indistinct edges and planned low maintenance fescue surrounds. Discussion between Baril and the course's developers as to how the bunkers should be maintained led to the creation of an unusual policy, which, Baril said, is an interesting experiment for the industry as a whole to keep an eye on.

Essentially Stensballegaard is going back to an older model of bunker maintenance, with the aim of both reducing costs and reinstating sand hazards as a truly strategic element within the course's design. **The only grooming of the bunkers is aimed at keeping plant growth within the bunkers down and retaining the sandy feel.** There are no rakes on the course; players are requested to smooth the sand down with their feet or a club.

Baril told the meeting that he and the club created a bunker policy document to be given to members, explaining the ideas. Talking to players has revealed that many believed there was an official standard for bunkers, which must be maintained on a quality golf course, and also that, because the course was designed by a high-profile American firm, they expected elevated levels of maintenance quality. Baril suggested that changes could be made in golfers' expectations in regard to bunker maintenance, but that it was vital to present it in terms of the strategic design of the course, rather than as a cost saving measure.

Golf trends | Henry DeLozier

Worldwide changes for golf

A game that reveres tradition and historic culture, golf continues to evolve in its many aspects around the globe. Golfers are changing and so too are the expectations and preferences of golfers. While new golf projects have slowed somewhat, change for golfers remains constant. For designers and planners the imperative is to maintain pace with change and to anticipate the direction and ripple-effects of change in golf.

First, and undeniably greatest in the global platform, is the growing dominance of international golfers in worldwide competitions. In a time when the US PGA Tour was *the* destination, golf grew and flourished. As the emergence of the European Tour becomes powerfully profound, golf is poised for another halcyon period when the global economy indicates stabilization. Hard on the heels of popular growth comes the Asian Tour with its legion of capable and determined young players. Golf is acting out the promise of globalization by attracting new and diverse audiences.

How, then, should golf planners, designers and builders prepare to provide golfers what they want? Following are four global trends, which were identified in a recent survey by Global Golf Advisors (GGA), which offer directional guidance for the future of golf around the world:

Migration to Reliability Golfers and prospective golfers have moved

to proven brands that routinely fulfill their intended lifestyles. Trust in the brand promise has proven to be a great advantage to top clubs, resorts and brands. This competitive advantage has emerged as the top performers have exercised three critical tactics for market differentiation:

First is reinvestment in capital assets. In early 2010 some clubs and golf-related businesses worldwide began to show separation arising from ongoing improvements to facilities, processes and new technologies. Among the most common capital investments at the top-performing businesses have been new social programs, improved easy-to-use technologies, and updated capital equipment such as exercise equipment, course maintenance equipment and interior décor.

In fact, among the top performers almost eight-in-ten (78 percent) report membership growth after club improvement investments were unveiled. Tired clubhouses and disappointing turf conditions were cited as the most frequent 'disappointments' in the category of underperforming clubs.

Secondly, updated market analyses. Demographic and economic market segmentation has shifted in most markets. Clubs and resorts which have updated their market knowledge and reprogrammed according to new and current data points are prospering. This endeavor involved identifying new

market segments and refining membership programs to align them with current market demand and elasticity for memberships. Among top-performing clubs that show growth, 92 percent have realigned membership programs after updating their previous market analyses.

Finally, reinvention of member programs. Second only to member satisfaction quotients, members (and customers of golf brands and services) require new energy and programs to keep them engaged in their clubs. The most popular new programs are tied to combining social programs and dining. Second in popularity for new programs has been generational memberships that enable multi-generational families to share club memberships and 'special times.' International and reciprocal membership programs have been the most successful new programs at clubs with strong seasonal changes in member usage and frequency.

Brand reliability—the assurance that one will receive an experience that is as good as or better than expected—is attracting more members and customers than price reductions.

Flight to Quality Top-performing clubs are being rewarded for maintaining high standards and for updating facilities. More than one-half (53 percent) of respondents to the recent GGA survey indicated a preference for joining a 'better club which features regular facility, program and service improvements' as a part of the club culture.

“Many underperformers have hunkered down to protect cash reserves and to await clear signals from the market; but the top performing clubs have re-committed to a superior market position

The market bias that rewards reinvestment and high performance standards first emerged during the third quarter of calendar year 2010 and persists.

Accelerated Metrics Top clubs have increased net member counts—new members added less resigning members—and posted improved financial performance along the way. In short, improved performance has borne more favorable results. Among the characteristics that improved at most upscale clubs are member count, dues revenues, use-fee revenue and facility utilization.

Derek Johnston, Senior Associate at Global Golf Advisors in Toronto, notes: “The top performers have distinguished themselves through superior financial management and facility utilization.” He notes that under-performing clubs routinely do not measure utilization and are unaware of the powerful influence of a systematic approach to increasing activity in club programs.

Across the board, most clubs (91 percent) have experienced

weakness in sustaining initiation fee collections. Nonetheless, the performance metrics for the most successful clubs (detailed in the table below) illustrate the overall significance of dedicated attention to excellence.

Female-Driven Programs Planners and designers must integrate the wants, needs and expectations of women into their concepts for clubs and resorts. Women indicate a desire for the club to provide a platform for socialization. Programs that enable the making of new friendships and the opportunity to share fun activities and pastimes resonate successfully to influence increased utilization among the women of the club.

Best management practice indicates great value in the empowerment of women in the club for leading new programs and for engaging female participation. Slow-growing programs benefit significantly when women members are allowed to lead them. Well-planned concepts include proper course signage and

markings for women, carefully considered forced-carries and negotiable hazards, and receptive course conditions—such as flowers and decorative considerations— attract women golfers.

Female survey respondents indicate that ‘women know what other women want’ and the result is improved relevance for the club and increased satisfaction for the club member participants.

‘Better is the enemy of good.’ Many underperformers have hunkered down to protect cash reserves and to await clear signals from the market; but the top-performing clubs have re-committed to a superior market position. Those clubs and golf businesses that are improving the member/customer experience are prospering. ●

Return on investment

The best performing clubs are those which have continued to increase capital investment

Category	Top Clubs	All Other Clubs
Dues Revenue	Up 2.2%	down 17.4%
Utilization	Up 13%	down 18%
Labor Costs	Up 7.8%	Up 2.7%
Capital Expenditure	Up 8.3%	Down 5.8%



Henry DeLozier

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“The challenge is to deliver a fun golf experience at a price that is appealing to players, but which keeps the facility financially sound

Community facilities | Rick Phelps, ASGCA

A standing ovation

It is a great honor to serve as ASGCA President. To follow in the footsteps of so many other Presidents—including my own father, Dick Phelps, who held the post in 1980/81—has made me a very proud man.

ASGCA's former Presidents, including most recently Erik Larsen, have done great work. Erik's 'value of the golf course' initiative has been a great help in explaining to people around the industry and beyond why golf courses are important assets for communities and organizations, including those who don't actually play golf. Because of the way in which real estate development has driven the bus in recent years, we have, to a large extent, gone away from viewing golf as a standalone business. That has to change; we can't expect real estate sales to subsidize golf in the way they have in the past, and so we have to focus more on how golf courses can stand on their own two feet.

With this in mind, I plan to use my Presidency to help get some recognition for 'the golf course down the street'—the kind of courses that millions of people, in America and beyond, play week in and week out. It's at these courses that the real value of the game is found, in both economic and social terms. They may never sniff a professional

tournament, but they continue to host 30,000-50,000 rounds each year, and they represent the heart and soul of the golf business. These, in my mind, are the courses, owners and operators that deserve a standing ovation.

Not only are these courses at the heart of golf, they're also pretty close to the heart of the majority of ASGCA members. Of our nearly 180 members, I estimate something like 70 percent make their living working with this kind of golf course. Too often, people seem to assume that the letters "ASGCA" after an architect's name means he or she will only be interested in big dollar, high profile work. But, throughout the society's history, the core of our membership has always been people practicing mostly on a regional basis and working largely on smaller scale, 'mom and pop' projects.

The challenge for these golf courses is to deliver a fun golf experience at a price that is appealing to players, but which keeps the facility financially sound. That's tough to do at any time, given how fierce the competition is between courses in the US and elsewhere, but it's even more pressing when times are tight. Architects are being asked by courses to help them reorganize their cost



Rick Phelps, ASGCA

Denver-based Rick Phelps is principal of Phelps-Atkinson Golf Course Design, and the President of ASGCA

base: to work with them and find ways of reducing inputs—manpower, equipment, chemicals—to cut costs without having a big impact on the quality of golf.

Ensuring that the quality of golf experience provided by a course stays the same or gets better, even while cutting back on costs is absolutely essential. Customers don't take kindly to being asked to accept a worse product. For example, architects are often asked about removing bunkers, because bunker maintenance is a big cost. But the real question course owners and operators need to work through, with their architect's help is which bunkers, and how many. Golfers still want interest, and if, by removing too many, or the wrong bunkers you make the course less interesting to play, you will lose customers.

Ponds, greens, tees, bunkers, fairways and trees all need to be considered when you're thinking about managing costs. It isn't just the amount you spend on taking care of those things themselves, but their impact on your other costs. Take trees, for example: if you have maintained grass with trees in it, how much longer does it take—and thus how much more does it cost—to run your rough mowers around trees? ●



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(Source: December 2010 NGF Irrigation
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