

# Golf & the Fight for Discretionary Dollars

By Gregory E. Martin  
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Let's face it: there's a battle going on and it's raging into a war. There is a fight over discretionary dollars, the consumer's extra money. This isn't a battle just within the friendly confines of the golf industry; it is being waged throughout the globe with theme parks, theater, movies, resorts/vacations and cruises, music and even Nintendo. While golf has been fortunate of late, this war may ravage a proud and recently successful industry. Therefore, it is necessary to be flexible during the coming times of change.

This is the era of the televised championship medal play on Tournament of Player Championship courses. As viewers and participants, we are convinced that the only measure of a golfer's ability is from the most difficult course in the area. Why is it that each week thousands of golfers subject themselves to the back tees on 7,000 yard courses with slope rating bulging to 145? In a world where careers, families, and the evening news is stressful, the game of golf should not be painful: life is challenging enough. Golf should be promoted and developed to be more 'recreational', not more difficult. Golfers want service, price, quality and maintenance. Most importantly, however, golfers want to play a golf course that will test their skill.

All too often a golf course is valued by difficulty and length. There may be no substitution for length, but to overemphasize its merit has unfortunately and unfairly discriminated against some of the most

beautiful and challenging shorter courses. The most notable golf courses in the world, Pebble Beach, St. Andrews, Augusta National and Cypress Point vary in length from 6,500 yards to 7,000 yards, yet each has the ability to create options, not matter what the ball position. These great courses challenge the mental aspects of the game and support the notion that difficulty does not encourage skill and finesse, it demands talent. Playable courses filled with options are favorable, Harder is not necessarily better and skill is far different than strength.

Too often the design of a golf course begins with creating length and imposing difficulty. Designs are stretched past recreation, challenge and mental stimulation to punishment. The design of a golf course should begin with recreation for the middle to high handicap golfer and then implement difficulty where appropriate for the better golfer. National Golf Foundation analysis indicates that less than 20% of the population shoots under 90 on a consistent basis, yet many layouts of the past decade demand "my way or no way". Architects and those responsible for renovation should keep in mind that 73% of the rounds played are by 25% of the golfing population. It is clear that a facility should seek the higher frequency golfer.

Golfers are nomadic by nature, testing and trying new venues as they are opened. The courses that meet the quality, service and challenge demands of the high frequency golfer will ultimately win the "discretionary dollars". To produce a==== or implement improvements that encourage the golfer to return, the course design should provide the following three key elements:

First, the course should be planned so that it is recreationally challenging for all abilities. This will surely expand the use of the

facility and raise the potential for economic viability. Multiple tees, varied hazard locations, limited forced carries, forgiving fairways and accessible/puttable greens all account for playable layouts. Ironically, making the course difficult is easy and expensive. Difficult layouts for junior, senior, women or high handicap play will, in fact slow play and reduced the chance for repeat play. Good golf course design should entice the golfer to return.

Second, the course should be visually appealing and designed to enhance the surrounding landscape, not dominate it. The layout should be blended into to using native features and culture. The seaside links of the British Isles don't try to hide the windblown dunes and the 'culture' of the parkland courses in southern England are vastly different than the desert courses of the southwestern United States. In other words, capitalize upon your local culture and landscape. The economic life of the golf course is hinged upon simplified construction and long term maintenance costs.

We cannot diminish the positive impact to the elaborate designs of the 1980's from renowned architects such as Dye, Nicklaus, Jones, Fazio and others. These architects and their designs have impacted the industry forever with highly visual, demanding layouts capable of bringing the best golfers in the world to their knees. But golf course architecture is moving toward simpler design. Minimalist golf course architecture is a positive trend that will help insure the long term success of the industry with sustainable landscapes. A return to "soft-handed" designs with less intrusive construction will reduce maintenance, irrigation and construction costs while, simultaneously, promoting play to a wider

range of the golfing public through lower fees.

Third and finally, golf, by definition, has varying fields of play and this sport was historically played under match play conditions. Therefore, golf courses should be measured less against one another and more upon its ability to challenge a golfer under match play conditions. If this can be accomplished, golf course architects will feel less compelled to stretch a course to 7,000 yards, routing courses that fit the land, requiring less invasive construction. Golfers and the golf industry should look less at the length and difficulty of a golf course and more at how the course mentally challenges and stimulates the golfer.

The design of a golf course is a compelling process. Some of the most appealing courses in the world have evolved from nature's handiwork. The presence of a golf course will have a profound effect on the local quality of life and environment for generations of golfers, providing open space and recreation. Facilities need to be prepared for the coming challenge for discretionary dollars and golf course architects need to recognize that harder may not be better: that the economic and environmental life of a golf course may rest with sustainable, less intrusive layouts that encourage the golfer to return.

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## Part II – *Fueling the Growth of Golf*

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As golf development continues to boom, current golf course construction remains at a record pace. So far, there have been more course opening in the 90's than in all of the 1980's. Why has golf, in spite of economic cycles and leisure activities so available, enjoyed such rampant growth? There are two specific reasons, I believe, that have fueled the recent growth of golf. They are: television and golf course maintenance techniques.

Primarily, golf growth in popularity can be traced to television and its implications. Television remains the fuel of the golf explosion. It has exposed us to a variety of appealing aspects of the sport. Each week, we are engaged by the lonely business of the golfers while exhilarated with the surroundings of the golf course architecture. Golf rejuvenates us: we see beautiful courses, hosting million dollar tournaments that attract the finest golfers in the world accomplishing what each weekend golfer can only dream in a perfectly manicured arena.

Television gave us access to the competitors and the courses they play. Television has also given us the opportunity to see exotic places and courses that are sited in the most intriguing and beautiful locations. We can now watch golfers play the enchanted and barren linklands of St. Andrews: we can witness the "back nine" beauty of Augusta

with its towering pines, flowering dogwoods and immaculate conditions: or the majestic seaside links at Pebble Beach. This year we saw the simple elegance of Shinnecock Hills, demanding the best from the best.

Television coverage of these courses and their event captured our fascination and prompted an evolution in golf course design. Modern era designs from Dye, Nicklaus, Fazio, the Jones family and others gave us new visual sensations with their concoctions. While these older courses, like Pebble Beach, Shinnecock Hills and Pine Valley were designed using little or no manipulation, modern day architects use sophisticated land form artistry to create distinct 'golfform' features from less attractive and even unusable sites. This evolution of Golf Course Architecture has transformed the industry.

As a result, the most potent "fuel" of the golf industry was borne to accommodate these highly visual and recreationally challenging courses. The era of the televised championship medal play on Tournament of Players Championship Courses has fostered a wider appreciation of the golf environment and with that came the greatest evolutions in the past two decades: golf course maintenance techniques. Each of us see perfectly manicured courses weekly and expect those same conditions at our local municipal or country club.

Maintenance costs have soared in order to produce better conditioned fairways, quicker healing tees, wall to wall irrigation and 'fast' greens. As a result, golf course superintendents have a greater understanding of turfgrass requirements that require more sophisticated equipment, irrigation techniques and more elaborate maintenance operations. It is this rising quality and condition "expectation" of the

average golfer that has propelled the growth and evolution of the golf industry.

While the standards of the average golfer continue to be raised, golf course architects and superintendents must look to develop more unique challenges with sustainable landscapes. Creative design and maintenance is needed by reducing maintained turf and establishing wet and dry meadows, wildlife refuge areas and more diverse water systems. A positive first step is the Audubon Sanctuary Status. This should be the goal of each and every superintendent, architect or golf manager. The environmental and economic benefits generated by Audubon Sanctuary Status is lasting and will be seen by the golfing public as environmental leadership, aiding the long term interests of the golf industry.

We are certainly intrigued with the sport, too. This game, which was intended for recreation and leisure, gets in our blood. While wrestling with our game every week we are comforted, somewhat, with pleasing pace and the course environment. Because of its relaxing pace, its relationship to the outdoor, its unique challenge and the camaraderie that golf can provide, this sport has become popular across generations and particularly, with masses of baby boomers.

So golf has become a big business. The largest segment of the population is now reaching middle age when earning power is at a peak. It is believed that business conducted on the golf course is second only to the board room. The average player is well educated, has a above average income and is, maybe, most importantly, willing to spend it on golf gadgetry of all shapes and sizes. Fifteen billion dollars were spent last year on golf related products. This translates into more access to products and a

wider requirement for the availability of the sport.

What was once a recreation, a sport afforded by and exclusive leisure class is now an industry available and demanded by most segments of society. Most professions within the golf industry were learned trades. Colleges now offer studies in Club Management, Golf Course Architecture, and Turfgrass Sciences, It was noted recently, at a Midwest State University, which graduated 30+ from the Turfgrass Science Department 10 years ago now have over 80 in the senior class curriculum. It is clear that golf has developed into an industry.

Maybe the past two decades reflect a second "Golden Age of Golf". While this growth continues, it is necessary to deliberate the inevitable changes that are necessary to sustain the industry through the coming years. As professionals within this industry, we must be acutely aware of the cycles of the sports world. Look at tennis or even baseball. As stewards of the sport we should encourage wider access and greater expectations, but understand that this can encourage scrutiny.

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## Part III – *The Changing Course of Golf Course Design*

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For those of us who depend upon the golf industry for our living, the recent growth in golf course development is encouraging. The continued expansion of the industry is positive, but we must be careful. This exposure has forced growth, indeed, but it has also encouraged scrutiny. While golf is enjoying its greatest popularity in decades, many parts of the industry are seeing greater clientele expectations and therefore, higher operational costs.

These raised expectations have generated higher maintenance and construction costs more stringent environmental impact considerations and more difficult or “visual” golf courses. Unfortunately, this has tended to shift consumer access to the more fortunate. While, rising expectations of the average golfer continues to fuel golf course development it has also forced existing golf facilities to make improvements in an effort to keep up with current maintenance and design trends.

Ultimately, the facility that meets the quality, service and challenge demands of this golfer will ultimately win the “discretionary dollar”. And while industry expectations change, so must golf course architecture. There is a growing acceptance or expectation of unique layouts with less intrusive design features, less earth moving and fewer elaborations. Pete Dye, the most

diabolical architect of our generation has amended his design style to provide more “playability”, while enforcing shot making.

The most revealing aspect of golf course design trend is toward “Traditionalism” or “Minimalist”. These are current, and often overused, design themes that have crept into the vocabulary of golf enthusiasts. Recently developed courses like Sand Hills in Nebraska and The Links – Red Mike in South Dakota punctuate a trend toward minimalist design. In fact, our acceptance of more traditional courses like Shinnecock Hills illustrates this.

At Sand Hill, golf Course Architects Bill Coore and Ben Crenshaw moved less than 10,000 cubic yards (cy.) of earth to produce a remarkable inland links style layout. This is extraordinary by today’s standards, because new golf course construction can generate 50,000 cubic yards of earth (on the low side) to more than one million (1,000,000) cubic yards of earth, some even more. I have yet to play Sand Hills, but by all accounts, this is an impressive project.

However, finding land that has all the required ingredients to truly be considered minimalist is a difficult task. At Sand Hill, the architects sought and found the greens and worked back through the fairway toward the tees. While this seems romantic, even idealistic, it is certainly the exception. Most practicing golf course architects could, in fact, find a pure minimalist golf course on a 1,500 acre site given little or no development constraints. In fact, it is widely agreed that there is a tendency toward Minimalist; however, golf course architects are finding that clients and developers expect this style of architecture due to reduced budgets, site and environmental constraints, or less attractive feasibility studies.

While golf course architects agree that there is a movement toward simpler design themes, this can be traced to our client's requirement for greater economic viability from the start of a project. Therefore, private and high budget projects are less prevalent. Golf course architecture is moving away from the elaborate design themes of the late 70's and 80's in an effort to develop facilities that are economically and environmentally sustainable.

### **So What's Next**

Golf continues to expand in different markets today. Juniors, seniors, women and minorities are all being exposed to golf in greater number. Michael Jordan is developing a number of quality practice facilities throughout the suburbs catering to low and middle incomes and juniors. A current project of ours calls for the inclusion, if budget allows, of a 'junior' course within the confines of the practice range. There is an increasing need for upscale par 3 courses, public and private practice facilities, short 'precision' ranges and executive courses.

A number of quality nine hole venues, designed by the area's finest architects are currently planned or are open for play. The 'nine hole course' is no longer perceived as the country cousin of the 18 hole private club. Through innovative course design and flexible facility programming, golf will continue to grow into various markets,

But all is not easy. The National Golf Foundation reports that the total number of rounds played in the U.S. has moderated considerably since 1989. Additionally, The National Golf Foundation has amended their prediction of 30 million golfers by the year 2000 down to 25 million. Nationally, new

course openings are moderating. Does this indicate that the golf boom is finally out of gas?

Maybe. This is more likely a correction in golf market development. Recent trends indicate that the profile of the average golfer is changing. No longer does the avid golfer need to join a Country Club to feed their addiction. The average golfer with \$20 - \$40 in his pocket every week is just as likely to be a frequent golfer as the local country club member. Further, these golfers may be just as, or more loyal to their facility than the private club member.

Golf Course Architects and Management companies see this and are developing facilities that meet this market niche. New public facilities are being developed at a pace that outnumbers new private courses by almost 2:1 and these courses are designed by the best Golf Course Architects available. Better yet, these facilities are maintained and managed with the same scrutiny as private facilities. Production of higher quality public and daily fee facilities is finally catching up with the public and daily fee demand.

Further, Municipalities, Park Districts and other public bodies are realizing that golf facilities provide a revenue stream and can subsidize a variety of non-revenue producing programs. Golf courses provide open space, recreation and revenue for public bodies within a specified market niche. A variety of golf development projects are being introduced in many urban or landlocked suburban locations to provide this valuable asset.

Conversely, private clubs will have some difficulty in the coming years recruiting or retaining members. With the growing presence of high quality public facilities,

potential club members find it hard to justify the up front and continued expense of membership when suitable daily fee facilities exist. These facilities will need to market themselves with all aspects of the club, with added swimming, health and fitness facilities; varied food and beverage marketing and more targeted business networking. Further, these clubs may need to open the door to outside revenue producers like golf outing, weddings, banquets or other income producers in an effort to sustain the changing market conditions. Those clubs that are foresighted and creative in a demanding marketplace will be able to keep their private status.

This challenge is within public and daily fee golf also. High end golf development growth is moderating, while established facilities, with no record of improvement, are pumping thousands, or even millions of dollars to implement or redo irrigation systems, renovate greens, tees, fairways, install extensive landscaping and expand clubhouses. Fortunately, or unfortunately, traditional stereotypes of golf are melting while the industry expands. Whether or not this is positive for the game, expectations are changing. The average golfer now has access to a variety of upscale and affordable courses from the architects that brought you PGA West, Muirfield Village, Haig Pointe, Wild Dunes and Kemper Lakes. Unquestionably, established facilities must be ready to meet this quality expectation challenge.