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## 2015 State of the Industry

FEATURES - STATE OF THE INDUSTRY

GCI STAFF | February 19, 2015

### Water & Irrigation

Compensating for an increase in water costs could be partly to blame for annual budget hikes in regions such as the West and South. However, according to the research findings, irrigation and cost-of-water issues may not be as big of a concern or agronomic challenge as some may believe.

When examining the data, water budgets increased overall from nearly \$16,500 in 2011 to \$22,800 in 2015. While a regional breakdown wasn't available for the 2011 data, superintendents at western courses anticipate spending nearly \$83,000 on water in 2015, compared to \$15,000 at southern courses, and less than \$10,000 at courses in the Northeast and Midwest. However, nearly two-thirds (62 percent) of all respondents indicated they weren't very concerned about cost-of-water issues. Only superintendents in the West (55 percent) cited cost-of-water issues as a budgetary concern.

Additionally, the majority (40 percent) of superintendents responded that irrigation upgrades weren't part of their spending plans for the next three years. And of those superintendents who planned some sort of irrigation upgrade (60 percent indicated they'd perform at least one improvement task during the next three years), the focus was on replacing nozzles (17 percent), software (16 percent), with the greatest frequency happening at western courses (24 percent and 25 percent, respectively).

### Methodology

During the last quarter of 2014, Golf Course Industry contracted with Readex to assist in the creation and to facilitate the distribution, completion and computation of the State of the Industry survey that examined superintendent trends and attitudes on a variety of topics.

GCI had 569 superintendents or superintendent-equivalent personnel of 18-hole facilities from around the U.S. complete the survey. As an added incentive to complete the questionnaire, GCI committed to making a substantial donation to the Wee One Foundation, a charity group started in memory of Wayne Otto, CGCS, that assists superintendents and other turf professionalism in need.

### INDUSTRY INSIDER

#### MIKE HUCK

#### Turf and Irrigation Services

"Moisture meters used to be a novelty. You would go into the shop and they have one of these things sitting in the corner of the superintendent's office and the superintendent and assistant might go out and play with it and get a handle on it. Now you go into shops and see three or four of these portable ones hanging on the wall that their hand waterers take with them and they are giving it an exact number and they are saying, 'You don't water it unless it's this exact percentage.' That's been kind of a fascinating thing to observe."

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For the purpose of this report, data was broken down beyond "all" responses to include analysis by:

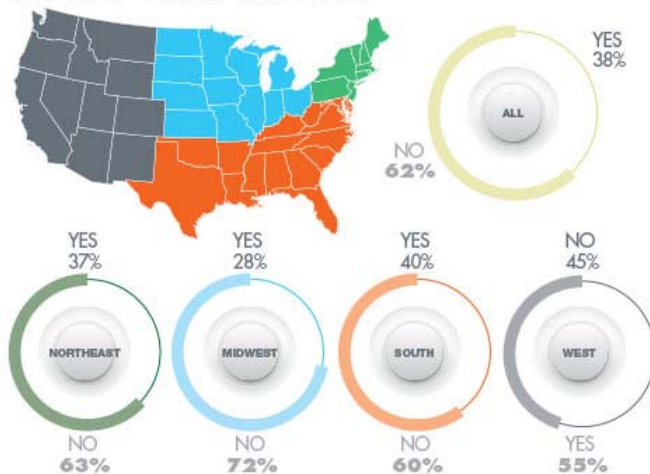
- **Private vs. Non-private** – Private course superintendents made up 43 percent of all respondents, while public course superintendents made up 57 percent. "Non-private" included public/daily fee (23 percent), semi-private (15 percent), resort (5 percent) and government/municipal courses (14 percent).
- **Geographic region** – Respondents were broken down by their location: Northeast (19 percent of total respondents); Midwest (33 percent of total respondents); South (31 percent of total respondents); and West (17 percent of total respondents). See the map for which state belongs to which region.
- **Non-capital ops budget** – Respondents were also categorized by how their 2015 non-capital operations budgets compared to the average (\$697,000). This included "below the average" (58 percent of total respondents); "at average plus" (42 percent of total respondents) and "\$1 million plus" (23 percent). It should be noted that "\$1 million plus" was also represented in "at average plus."

Finally, when applicable, the 2015 data was compared against data from the 2012 State of the Industry report, which analyzed trend and attitude data compiled during the fourth quarter of 2011.

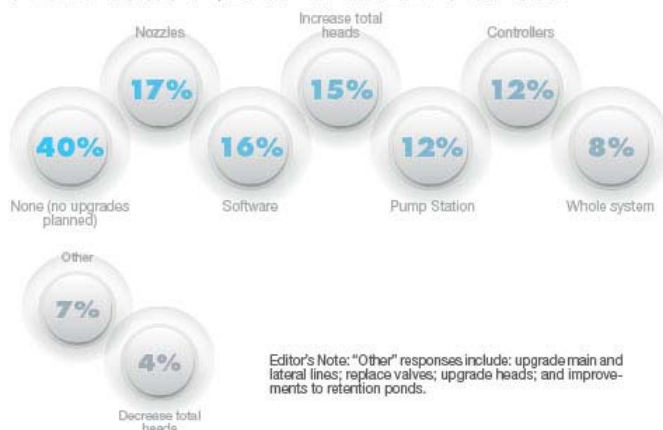
**DO YOU REGULARLY PERFORM IRRIGATION CUP TESTS?**



**ARE YOU WORRIED ABOUT HOW THE FUTURE COST-OF-WATER ISSUES COULD IMPACT YOUR BUDGET?**

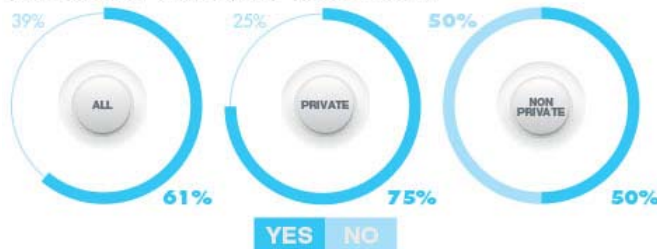


## PLANNED IRRIGATION UPGRADES FOR THE NEXT THREE YEARS

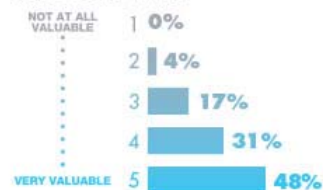


Editor's Note: "Other" responses include: upgrade main and lateral lines; replace valves; upgrade heads; and improvements to retention ponds.

## DO YOU UTILIZE HANDHELD SOIL MOISTURE METERS OR OTHER PROBES TO MORE EFFICIENTLY IRRIGATE?



## HOW VALUABLE ARE THESE METERS TO YOUR TURF MANAGEMENT PROGRAM?



## STAYING AFLOAT

We asked superintendents what steps their course was taking or planning to address future cost-of-water issues. Here are some of their responses.

- Incorporate better management practices
- Build additional ponds, wells, reservoirs to become less reliant on potable water
- Grass conversion to reduce water use, including non-playing areas to native beds
- Install more efficient heads, fine tuning nozzles
- Experimenting with wetting agents
- Getting members more used to seeing "brown"
- Identify areas that can be managed with little to no supplemental water
- Increased hand and spot watering
- Conduct irrigation audits
- Investigate new technology, including software and moisture meters

### Chemical Breakdown

Superintendents are using more liquid fertilizers and biostimulant products as part of their turf maintenance program than they were three years ago, according to 2015 State of the Industry data. Superintendents out West (24 percent) are using more of this product than in any other areas of the U.S.

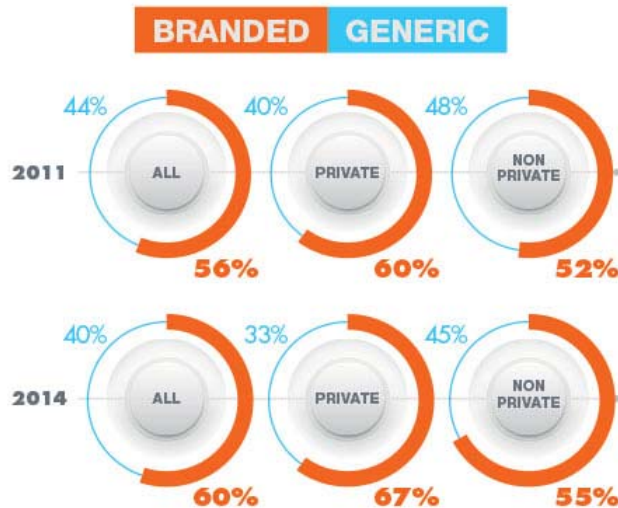
And with the ages-old debate between branded and generic products, superintendents report they are using slightly more branded products than they were three years ago (60 percent vs. 56 percent, respectively). Dialing down further, of those who use branded products, a third (33 percent) indicated these products make up 75 percent to 99 percent of their total product mix.

**INDUSTRY INSIDER  
BRIAN BOYER**

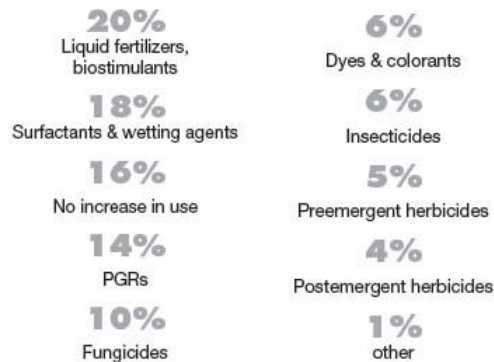
Superintendent  
Cinnabar Hills Golf Club,  
San Jose, Calif.

"We haven't gone to a lot of liquid fertilizers. We started during the fall of last year putting organics on our fairways and so far we are happy with what we are seeing. We're seeing slow growth and it's tough for things to grow real fast because of the drought."

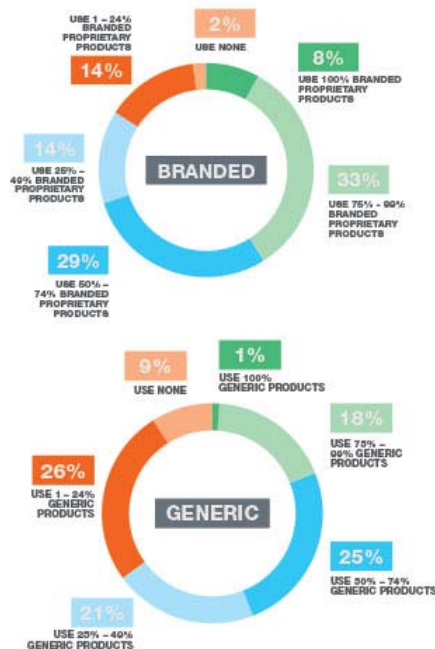
**BRANDED PROPRIETARY VS.  
GENERIC PRODUCTS**



**AREA OF TURF MAINTENANCE PROGRAM  
WITH THE LARGEST INCREASE IN USE**



## PERCENT OF USE



### Equipment

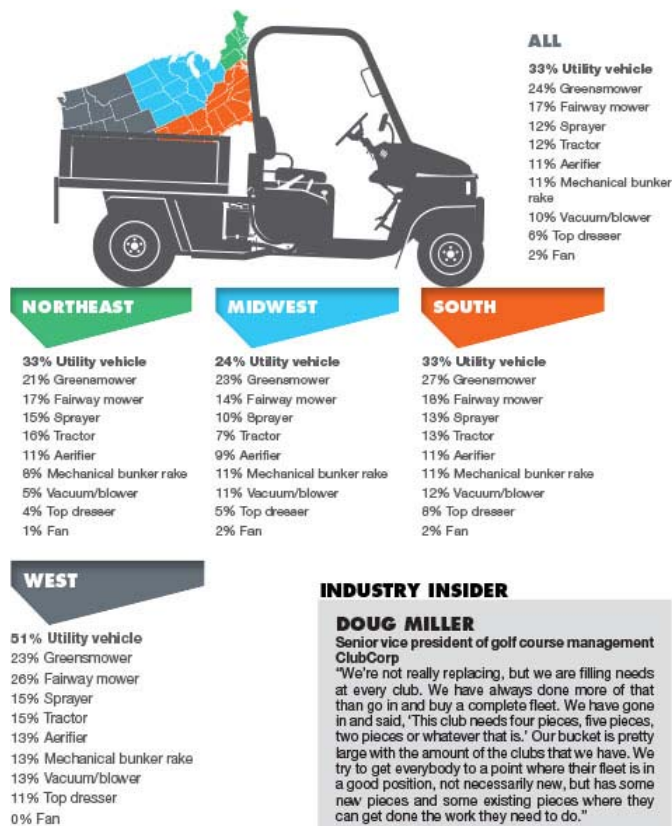
Utility vehicles will be the hot commodity among superintendent equipment purchases in 2015, according to the data. A third of respondents (33 percent) said utility vehicles were on their shopping lists. Broken down further, 43 percent of respondents at private courses, 51 percent at western courses and 55 percent at courses operating with budgets in excess of \$1 million all indicated utility vehicles as their top purchases.

Regarding mowers, overall superintendents indicated more interest in acquiring greensmowers (24 percent) than fairway mowers (17 percent). Broken down further, greensmower purchasing was favored by respondents at private courses (26 percent), courses in the South (27 percent) and courses operating with budgets in excess of \$1 million (35 percent).

Interestingly enough, when we asked about planned purchasing in 2011, 42 percent of superintendents indicated utility vehicles were on their agendas.



## PLANNED PURCHASES FOR 2015



### Labor

Labor and staffing is a management challenge, and finding skilled, reliable and dependable workers makes the hiring process a real chore for superintendents.

While the research points to a minor drop in staffing levels over the last three years for full-time and seasonal positions, more than half of superintendents across the spectrum (including course type and geographic regions) report some level of difficulty in hiring workers. For example, private facilities had slightly more difficulty hiring than non-private courses (63 percent vs. 60 percent, respectively), and 66 percent of respondents from the Northeast and South reported hiring challenges. Additionally, more than a third (39 percent) of respondents from the Northeast reported hiring troubles.

The problem also extends to attracting entry-level assistant superintendents, with nearly half (42 percent) of superintendent respondents citing difficulty, according to the data. Again, superintendents at private courses (48 percent) reported a much greater frequency of difficulty in hiring entry-level assistants than their colleagues at non-private facilities (36 percent). However, it should be noted that, according to the research findings, a greater percentage of respondents at private courses (92 percent) were or are in the market for entry-level assistants than those at non-private courses (68 percent). Regionally, nearly half (49 percent) of respondents from southern courses reported some level of difficulty.

#### INDUSTRY INSIDER

##### JEFF WHITE

Superintendent  
Indian Hills Country Club, Mission Hills, Kan.

"Just finding bodies in general and having some bodies that want to work that you can coach along and train is becoming difficult. I think there are more full-time jobs out there. There are more construction jobs and those types of jobs that pay better. A lot of the stuff where we had these guys working three months or six months and then going someplace else has kind of dried up."



Editor's Note: "Other" was not an option in the 2012 State of the Industry research.

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