



ASGCA

2021 ASGCA-SLRG

Golf Facility Market Trend Watch

Presented by:

**SPORTS &
LEISURE**
RESEARCH GROUP



2021 ASGCA-SLRG

Golf Facility Market Trend Watch

The Thought Leadership Vision

- Fourth wave (third tracking wave) of Annual Proprietary Insights Program that enables ASGCA members and partners to:
 - Gain valuable and proactive perspective on key business issues for better decision making
 - Uncover constituent attitudes and perceptions on significant challenges, opportunities and issues in golf facility design and operations, while revealing perceptual gaps and alignment across key constituent groups





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Methodology: 2021 Tracking Wave

- Online survey of ASGCA members, *By Design* and *Golf Course Industry Media* subscribers/readers. Mirrors 2018-2020 waves
- Survey instrument refined by SLRG/ASGCA to incorporate trendable core questions and topical modules served to mix of architects, superintendents, general managers, facility owners/operators and golf professionals, partner organizations.
 - Results analyzed across key constituent groups and facility characteristic segments
- Average survey completion time of 25 minutes
 - 319 survey participants
 - Conducted October 2020





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KEY FINDINGS

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Key Take-Aways

- Volume of Renovation business over the past 24 months shows nearly half of architects reporting year over year improvement, which is up from 36% reporting an increase, last year. The plurality of architects report flat or consistent revenue, with less than one in four experiencing declines.
- The outlook for the next 24 months is more cautious relative to what we observed last year. Flat or consistent results remain the most prevalent expectation. While more architects look to be up than down
- Practice Area Improvements Supplant Master Plan Development as the most prevalent activity, enjoying a 12 point year-over-year increase
- Total Re-Designs, New Course Construction, and Re-Bunkering are Now Greatest Revenue Drivers, Unseating Master Plan Development
- A significant Majority of facility superintendents/operators have seen increased play create additional stress on their course maintenance program this year. However, they report that these added stresses created by increased play have neither accelerated nor delayed timetables for capital projects.
- In contrast with what facilities are reporting, architects See COVID impacts delaying decision making.
- Course Renovations Continue to generate the strongest interest among potential facility enhancements, trending upward to a new four year high among Public facility operators, while remaining stable at Private Clubs
- Regulatory issues have vaulted to the top of the list among huge shifts in the most significant issues impacting facility financial health in 2020. Labor impacts remain the most significant maintenance cost as inputs gain. Labor Continues to dwarf other factors as the biggest impact on maintenance budgets

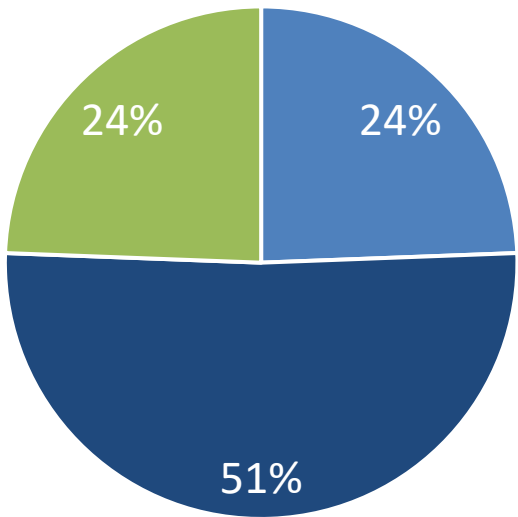


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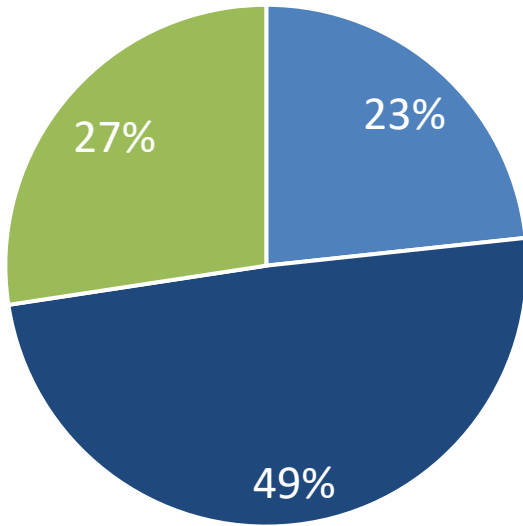
A Significant Majority of Facilities Have Seen Increased Play Create Additional Stress On Their Course Maintenance Program This Year

Q. Which of the following best describes the situation at your facility?



PUBLIC

- The impact of increased play at my facility has created significant additional stress on our course maintenance program
- The impact of increased play at my facility has created moderate additional stress on our course maintenance program
- The impact of increased play at my facility has had no material impact on our course maintenance program



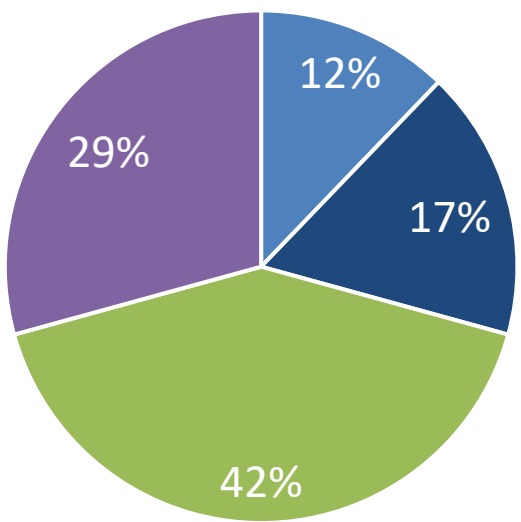
PRIVATE



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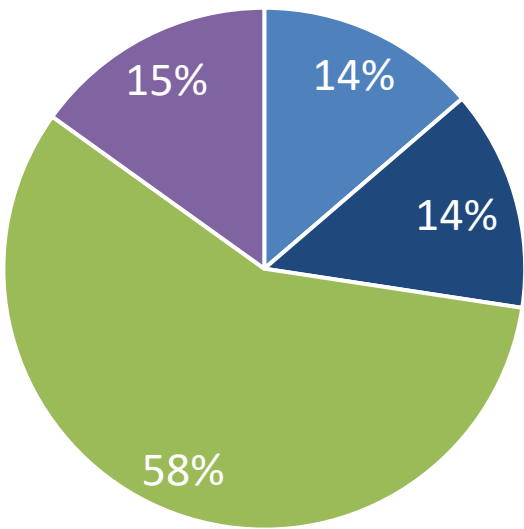
...But These Added Stresses, Created By Increased Play, Have Neither Accelerated Or Delayed Timetables For Capital Projects

Q. What, if anything has been the impact of increased play on facility decision making regarding capital projects to improve the golf course?



PUBLIC

- It has accelerated our timetable to undertake these projects
- It has delayed our timetable to undertake these projects
- It has had no impact on our timetable and we are proceeding with these projects at our typical pace
- It has had no impact on our timetable as we are not planning any capital projects at this time.



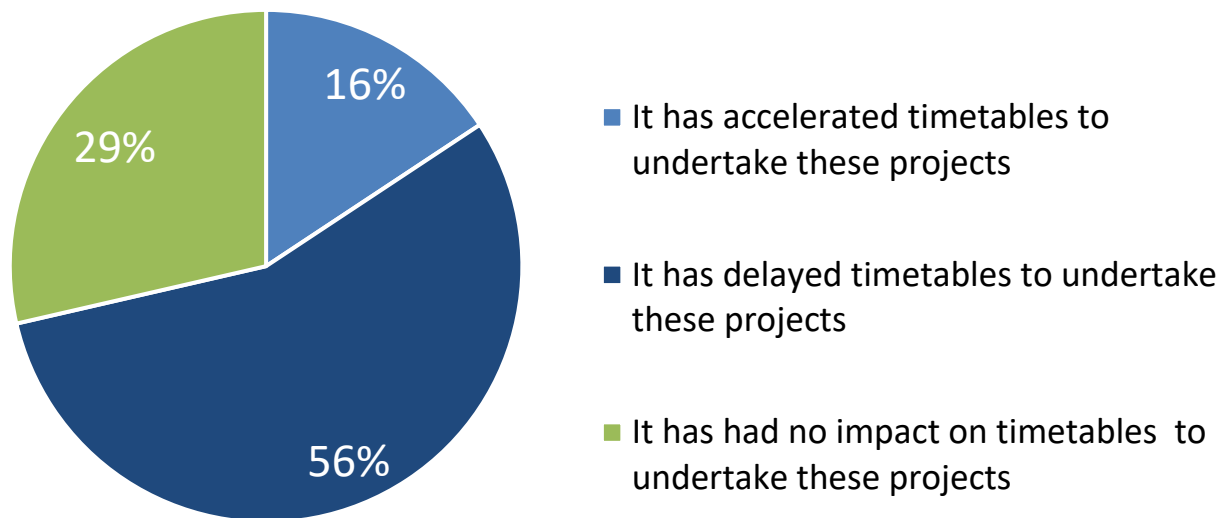
PRIVATE



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...But Architects See COVID Impacts Delaying Decision Making

Q. What, if anything has been the impact of COVID 19 on facility decision making regarding capital projects to improve the golf course?





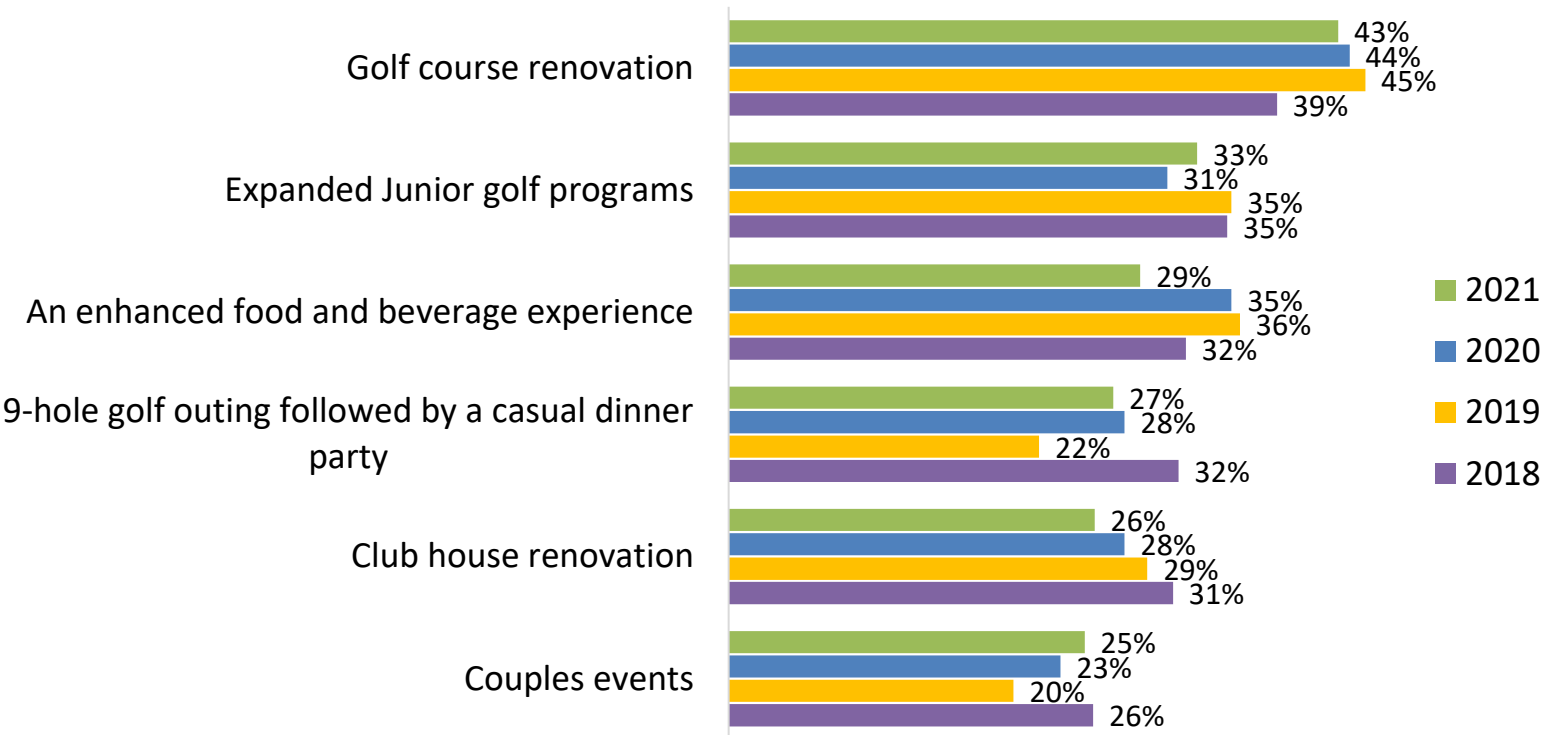
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Course Renovations Continue to Generate Strongest Interest Among Potential Facility Enhancements

Q. Which, if any, of the following potential enhancements would be of significant interest to your guests or members, and/or increase the usage of your operation?

Would be of significant interest
SUMMARY





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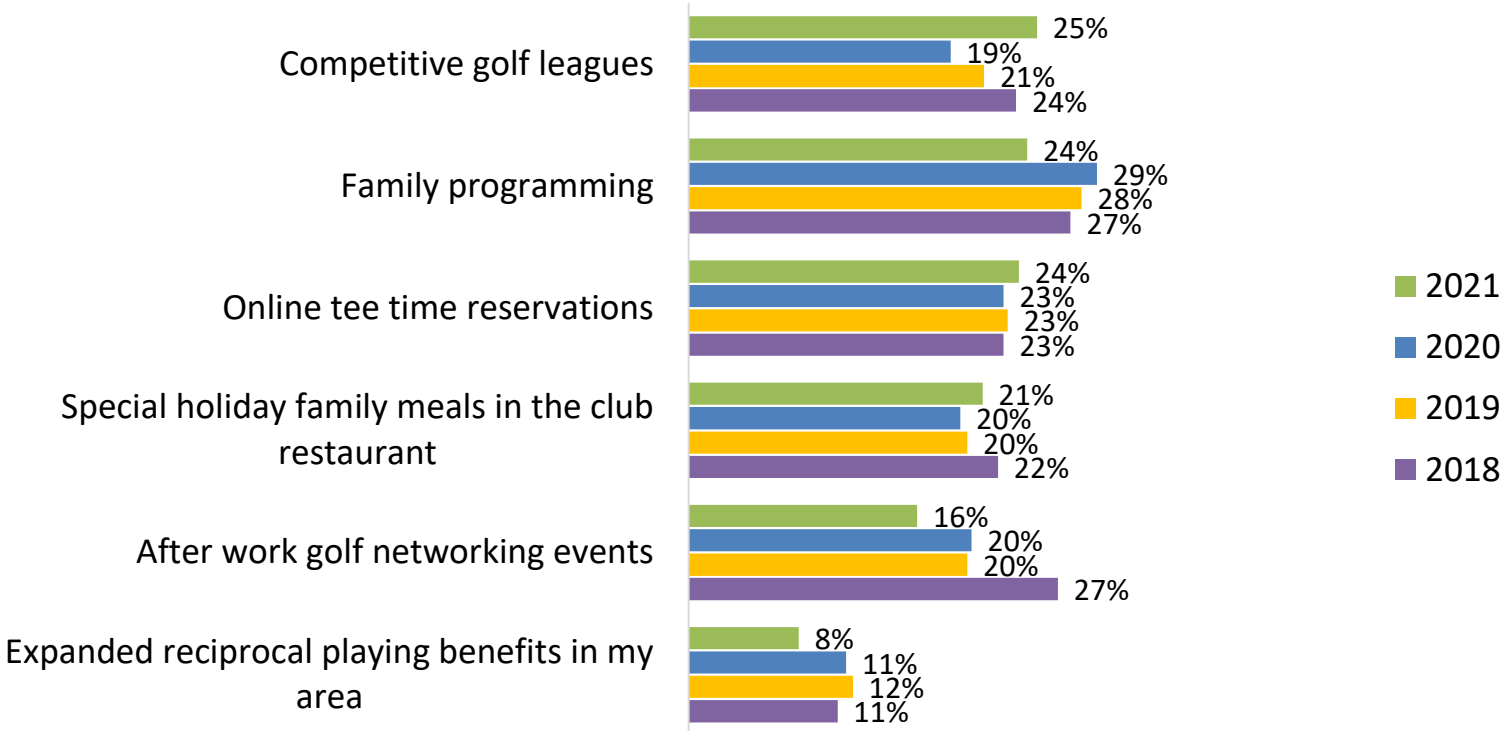
Golf Facility Market Trend Watch

Golf Course Renovations Remain Most Coveted in 2020 Among Potential Facility Enhancements

Q. Which, if any, of the following potential enhancements would be of significant interest to your guests or members, and/or increase the usage of your operation?

(CONTINUED)

Would be of significant interest
SUMMARY





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Golf Facility Market Trend Watch

Interest in Golf Course Renovations Continue to Trend Upward to New Four Year High Among Public Facility Operators; Stable at Private Clubs

Q. Which, if any, of the following potential enhancements would be of significant interest to your guests or members, and/or increase the usage of your operation?

Would be of significant interest SUMMARY	PUBLIC			PRIVATE		
	2021	2020	2019	2021	2020	2019
Golf course renovation	46%	41%	39%	43%	46%	47%
Expanded Junior golf programs	42%	31%	30%	30%	31%	37%
An enhanced food and beverage experience	27%	35%	33%	29%	37%	36%
9-hole golf outing followed by a casual dinner party	29%	24%	20%	26%	31%	21%
Club house renovation	29%	31%	25%	24%	26%	29%
Couples events	33%	21%	13%	22%	26%	22%



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Interest in Golf Course Renovations Continue to Trend Upward to New Four Year High Among Public Facility Operators; Stable at Private Clubs

Q. Which, if any, of the following potential enhancements would be of significant interest to your guests or members, and/or increase the usage of your operation?

Would be of significant interest SUMMARY (cont)	PUBLIC			PRIVATE		
	2021	2020	2019	2021	2020	2019
Competitive golf leagues	25%	19%	17%	26%	19%	22%
Family programming	23%	14%	23%	26%	42%	31%
Online tee time reservations	31%	28%	30%	19%	19%	17%
Special holiday family meals in the club restaurant	13%	12%	9%	29%	26%	28%
After work golf networking events	10%	17%	14%	20%	23%	22%
Expanded reciprocal playing benefits in my area	-	-	-	13%	20%	16%



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Golf Facility Market Trend Watch

Evolving Attitudes: Architects and Superintendents Align on Ranges as Priorities; Have Seen Opposite Impacts from COVID

Q. Please indicate how strongly you agree with the following statements.

Architects Top 3 Box Summary	2021	2020	2019
Allocating 10-12 acres of land for a range is a worthwhile investment	70%	71%	73%
Private clubs will need to evolve over time to continue to be relevant.	69%	80%	81%
Golf facilities have made concerted efforts to attract younger members in the past few years	52%	51%	52%
Over the past five years, Resource availability (eg. Water usage) has become a more important factor in the courses that I've designed or renovated.	51%	49%	56%
Golf facilities have been putting more emphasis on junior golf programs recently	46%	56%	46%

Superintendents Top 3 Box Summary	2021	2020	2019
There has been a surge in play this Summer at my facility	85%	NA	NA
There has been a meaningful increase in the number of new players at my facility, this season.	66%	NA	NA
Allocating 10-12 acres of land for a range is a worthwhile investment	64%	62%	62%
Overall, the net impact of the COVID 19 pandemic has been a positive for my operation.	62%	NA	NA
Private clubs will need to evolve over time to continue to be relevant.	52%	62%	60%



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Golf Facility Market Trend Watch

Evolving Attitudes: Architects and Superintendents Align on Ranges as Priorities; Have Seen Opposite Impacts from COVID (cont)

Q. Please indicate how strongly you agree with the following statements.

Architects Top 3 Box Summary	2021	2020	2019
I have a good understanding of the impact of ADA laws on golf facilities	43%	46%	52%
There has been an increase in golf course renovations/remodels over the past two years	39%	49%	60%
Golf facilities have been putting more emphasis on women's golf programs recently	39%	42%	35%
Over the past five years, agronomic practices have become a more important factor in the holes that I've designed or renovated.	37%	37%	48%
The overall time required to facilitate a new golf course construction from concept to completion, has increased over the past five years.	36%	42%	42%

Superintendents Top 3 Box Summary	2021	2020	2019
Labor laws and government regulation of labor is a bigger concern today than it was a year ago	39%	51%	56%
Golf facilities have made concerted efforts to attract younger members in the past few years	36%	47%	45%
I'm confident that we will see an increase in golf course renovations/remodels over the next two years	36%	33%	32%
Golf facilities have been putting more emphasis on junior golf programs recently	36%	43%	44%
There has been an increase in golf course renovations/remodels over the past two years	33%	33%	37%



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Evolving Attitudes: Architects and Superintendents Align on Ranges as Priorities; Have Seen Opposite Impacts from COVID (cont)

Q. Please indicate how strongly you agree with the following statements.

Architects Top 3 Box Summary	2021	2020	2019
Labor laws and government regulation of labor is a bigger concern today than it was a year ago	34%	51%	42%
Private clubs in my area have recently instituted a variety of new non-golf programs to attract families	32%	32%	33%
The overall time required to facilitate a golf course remodel, from concept to completion, has increased over the past five years.	28%	34%	31%
I'm confident that we will see an increase in golf course renovations/remodels over the next two years	27%	48%	40%
In my local area, golfers can get a similar or better experience to private clubs, at golf facilities or establishments that do not require a membership fee.	27%	32%	27%

Superintendents Top 3 Box Summary	2021	2020	2019
The overall time required to facilitate a golf course remodel, from concept to completion, has increased over the past five years.	31%	24%	24%
I have a good understanding of the impact of ADA laws on golf facilities	27%	26%	26%
The overall time required to facilitate a new golf course construction from concept to completion, has increased over the past five years.	26%	35%	31%
Golf facilities have been putting more emphasis on women's golf programs recently	25%	28%	33%
My golf operation or facility must make aggressive changes to remain viable in the coming years.	25%	NA	NA



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Evolving Attitudes: Architects and Superintendents Align on Ranges as Priorities; Have Seen Opposite Impacts from COVID (cont)

Q. Please indicate how strongly you agree with the following statements.

Architects Top 3 Box Summary	2021	2020	2019
Over the past five years, I've worked on more renovation and new build projects that have involved increasing the length of the golf course, rather than shortening it	24%	NA	21%
Overall, the net impact of the COVID 19 pandemic has been a positive for my operation.	22%	NA	NA
Golf facilities are putting a greater emphasis on walking the course	15%	10%	4%
Over the past five years, increasing distance has been a major impetus behind golf course renovations and new builds that I've been involved with.	13%	NA	15%
There has been an increase in new golf facility construction over the past two years	12%	14%	13%

Superintendents Top 3 Box Summary	2021	2020	2019
In my local area, golfers can get a similar or better experience to private clubs, at golf facilities or establishments that do not require a membership fee.	25%	21%	18%
I'm concerned about the financial stability of my golf operation or facility	21%	NA	NA
I'm confident that we will see an increase in new golf facility construction over the next two years.	17%	7%	1%
Private clubs in my area have aggressively reduced the cost of membership to attract new members over recent years	16%	25%	31%
Private clubs in my area have recently instituted a variety of new non-golf programs to attract families	14%	22%	29%



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Evolving Attitudes: Architects and Superintendents Align on Ranges as Priorities; Have Seen Opposite Impacts from COVID (cont)

Q. Please indicate how strongly you agree with the following statements.

Architects Top 3 Box Summary	2021	2020	2019
Private clubs in my area have aggressively reduced the cost of membership to attract new members over recent years	8%	24%	29%
I'm confident that we will see an increase in new golf facility construction over the next two years.	6%	10%	6%

Superintendents Top 3 Box Summary	2021	2020	2019
Golf facilities are putting a greater emphasis on walking the course	11%	14%	5%
There has been an increase in new golf facility construction over the past two years	8%	11%	5%

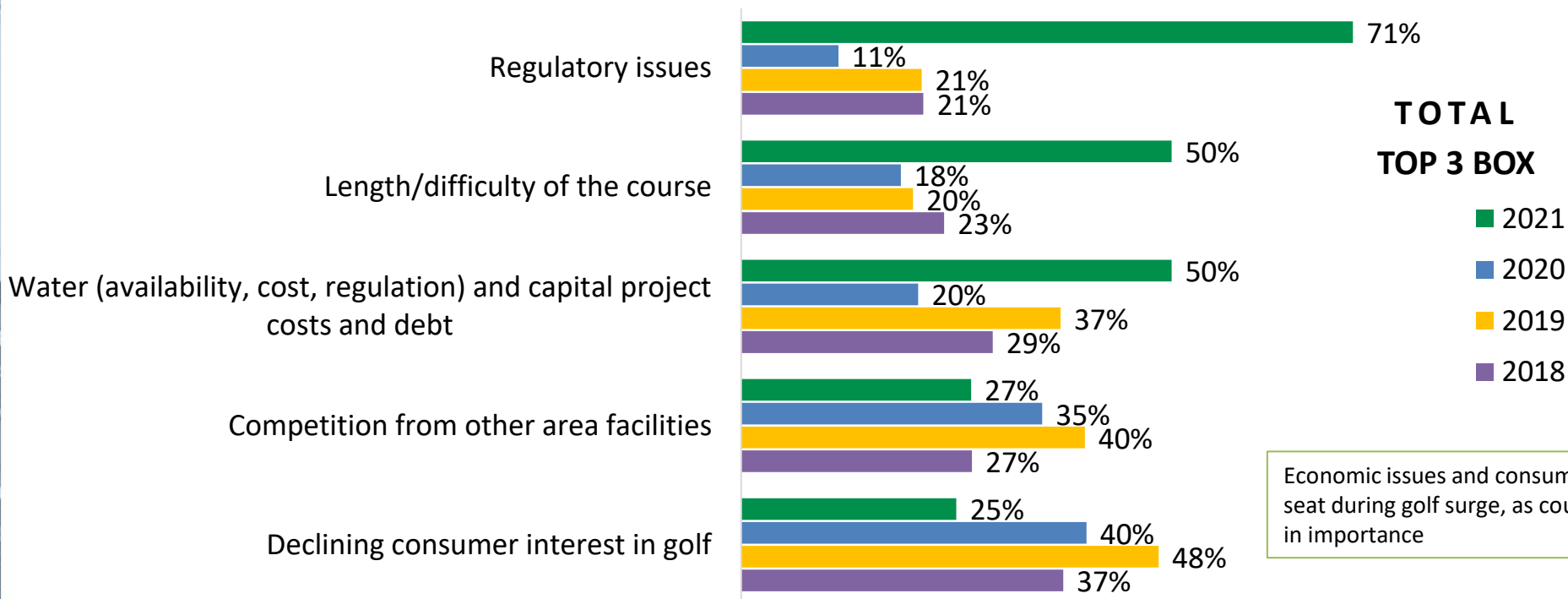


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Regulatory Issues Vault to the Top Among Huge Shifts in the Most Significant Issues Impacting Facility Financial Health in 2020

Q. Most significant issues that can impact the sustainability and financial health of your golf facility



Economic issues and consumer interest concerns take back seat during golf surge, as course length and water issues gain in importance

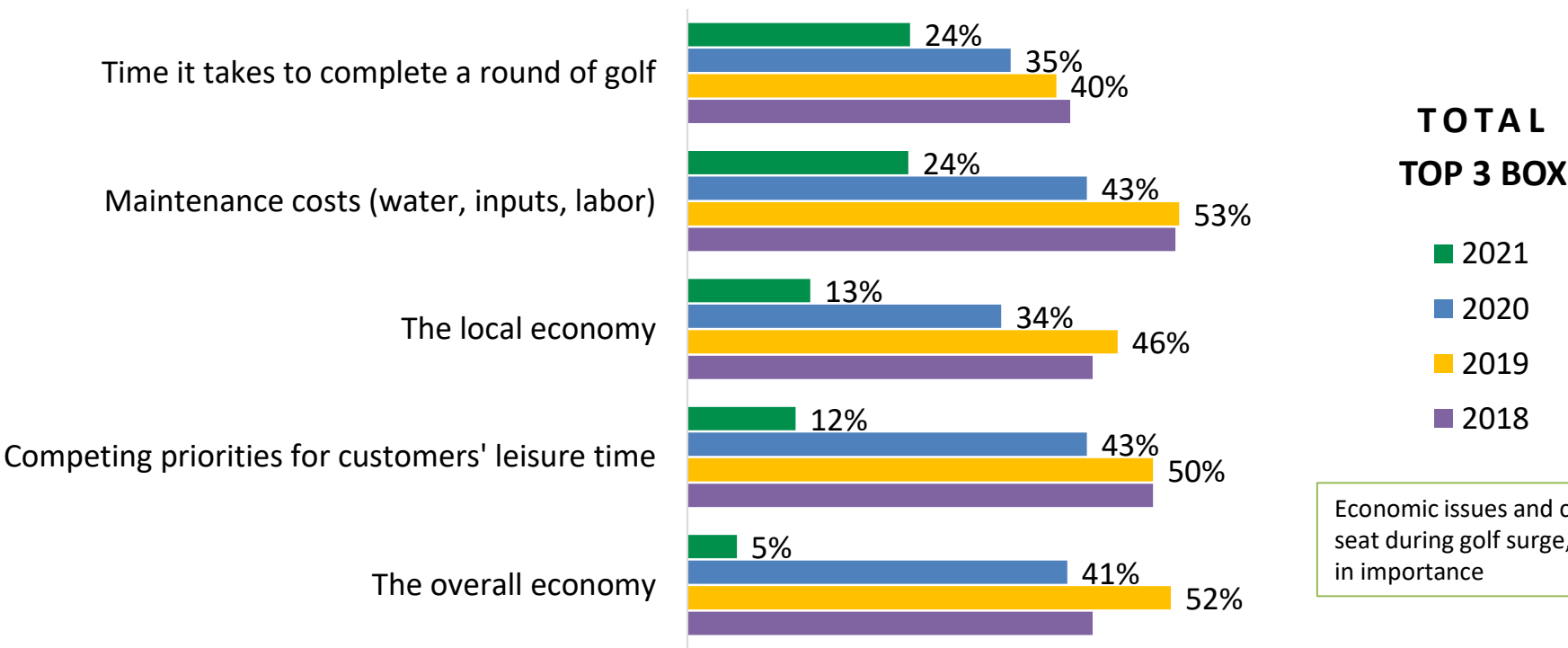


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Regulatory Issues Vault to the Top Among Huge Shifts in the Most Significant Issues Impacting Facility Financial Health in 2020

Q. Most significant issues that can impact the sustainability and financial health of your golf facility

(continued)



Economic issues and consumer interest concerns take back seat during golf surge, as course length and water issues gain in importance



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Golf Facility Market Trend Watch

Meaningful Shifts in Most Significant Issues at Both Private Clubs and Public Facilities

Q. Most significant issues that can impact the sustainability and financial health of your golf facility

TOP THREE BOX	PUBLIC			PRIVATE		
	2021	2020	2019	2021	2020	2019
Regulatory issues	73%	8%	24%	68%	13%	17%
Length/difficulty of the course	51%	11%	22%	48%	23%	19%
Water (availability, cost, regulation) and capital project costs and debt	51%	19%	37%	48%	21%	38%
Competition from other area facilities	15%	38%	44%	32%	33%	36%
Declining consumer interest in golf	29%	38%	56%	22%	41%	42%
Time it takes to complete a round of golf	17%	35%	46%	29%	34%	34%
Maintenance costs (water, inputs, labor)	21%	41%	54%	27%	44%	53%
The local economy	10%	32%	42%	16%	34%	48%
Competing priorities for customers' leisure time	20%	38%	59%	8%	46%	44%
The overall economy	10%	49%	46%	3%	36%	55%



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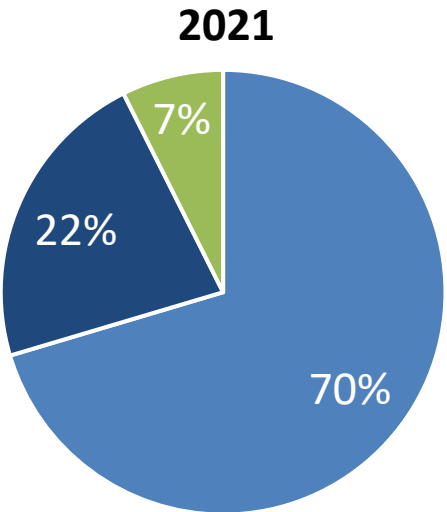
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Labor Impacts Still Most Significant Maintenance Cost as Inputs Gain

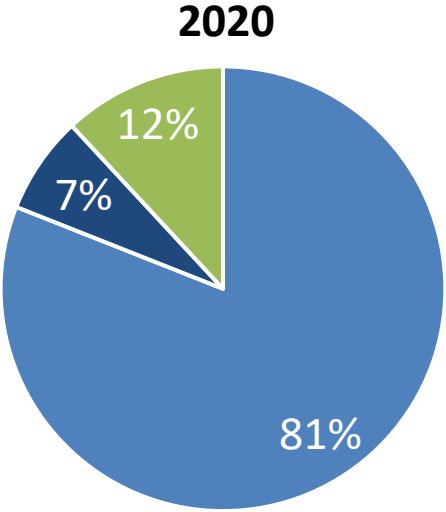
Q. You indicated that maintenance costs had a significant impact on the financial health of your facility. To which aspect of maintenance costs would you most attribute this impact?

TOTAL

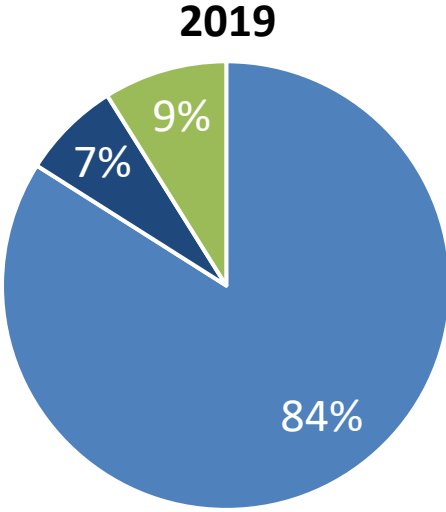
- Labor
- Inputs
- Water



	Public	Private
Labor	56%	82%
Inputs	33%	12%
Water	11%	6%



	Public	Private
Labor	73%	85%
Inputs	13%	4%
Water	13%	11%



	Public	Private
Labor	86%	82%
Inputs	5%	9%
Water	9%	9%



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Labor Continues to Dwarf other Factors as The Single Biggest Impact On-Course Maintenance Budgets

Q. Which of the following has the biggest impact on your course maintenance budget?

	PUBLIC			PRIVATE		
	2021	2020	2019	2021	2020	2019
Labor	83%	79%	81%	84%	88%	90%
Equipment	7%	14%	9%	12%	5%	-
Plant protectants (chemicals, fertilizer, nutrients)	7%	4%	-	2%	-	5%
Water costs	-	4%	6%	2%	3%	5%
Insurance	3%	-	-	-	-	-
Competitive practices of other local golf facilities	-	-	3%	-	5%	-



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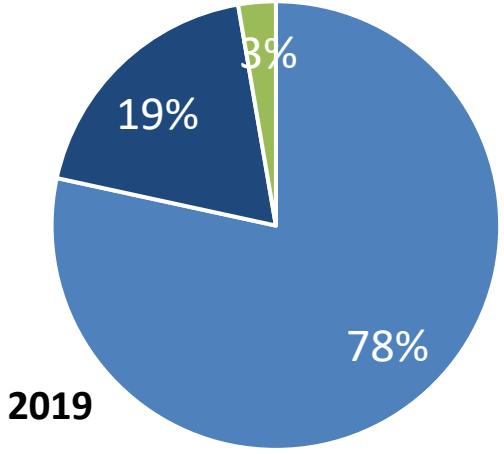
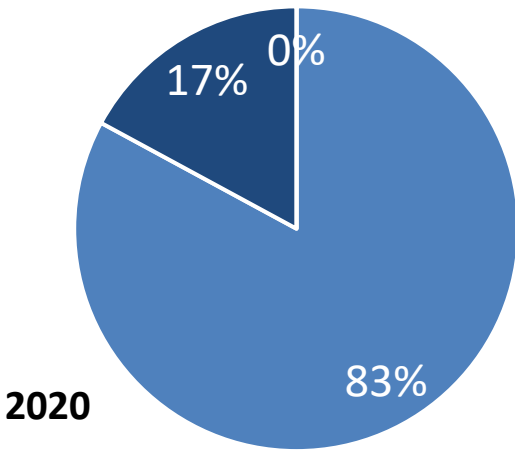
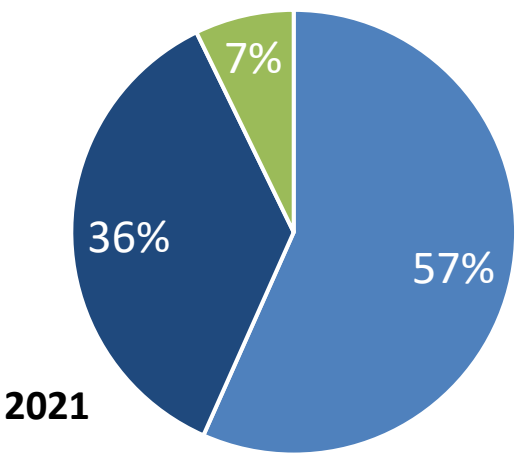
Finding And Retaining Available Labor And Quality Labor Continue to be Equally Challenging For Facilities

- Finding quality help is particularly challenging

Q. In thinking about labor issues that a golf facility your golf facility encounters, what do you see as the biggest challenge?

TOTAL

- Both are equally challenging
- Finding and retaining quality labor
- Finding and retaining available labor



	Public	Private
Both are equally challenging	61%	55%
Finding and retaining quality labor	36%	39%
Finding and retaining available labor	3%	7%

	Public	Private
Both are equally challenging	82%	83%
Finding and retaining quality labor	18%	17%
Finding and retaining available labor	-	-

	Public	Private
Both are equally challenging	82%	78%
Finding and retaining quality labor	12%	23%
Finding and retaining available labor	6%	-



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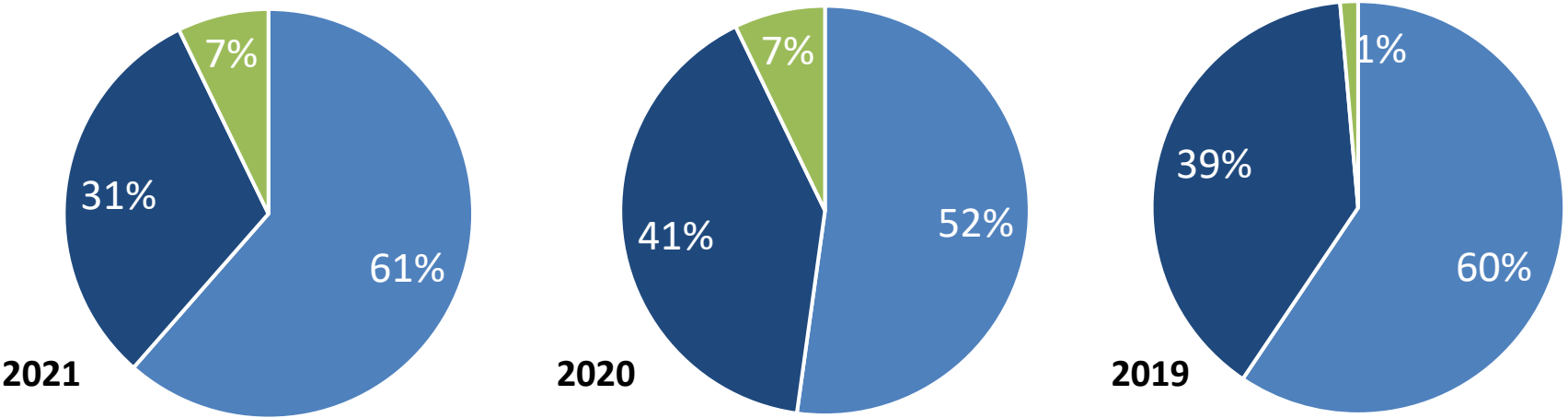
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Increasing Revenue An Even Greater Priority vs. Decreasing Costs

Q. Thinking about priorities for managing your golf operation, which of the following would be the single most important for you in the near term?

TOTAL

- Increasing revenue
- Improving customer satisfaction
- Decreasing costs



	Public	Private		Public	Private		Public	Private
Increasing revenue	70%	52%	Increasing revenue	79%	34%	Increasing revenue	79%	43%
Improving customer satisfaction	27%	36%	Improving customer satisfaction	18%	56%	Improving customer satisfaction	21%	55%
Decreasing costs	3%	11%	Decreasing costs	4%	10%	Decreasing costs	-	3%



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Golf Facility Market Trend Watch

Most Important Offerings For Customers Of A Golf Facility—as Evaluated By Superintendents And Other Facility Operators— It’s Still About the Greens and Overall Course Conditions

Q. Importance you feel each of the following aspects of the golf specific offerings at your facility or typical facility, are to its customers.

TOP 3 BOX SUMMARY

MOST IMPORTANT	TOTAL			PUBLIC			PRIVATE		
	2021	2020	2019	2021	2020	2019	2021	2020	2019
Condition of the greens	97%	98%	97%	98%	98%	95%	96%	97%	98%
Overall golf course conditions	94%	91%	92%	96%	92%	94%	94%	92%	91%
Consistency of the greens	93%	90%	94%	90%	90%	95%	94%	92%	93%
Overall courtesy and friendliness of the golf staff	81%	83%	80%	85%	88%	82%	82%	79%	79%
Condition of the fairways	77%	68%	74%	67%	65%	66%	83%	72%	79%



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Golf Facility Market Trend Watch

Most Important Offerings For Customers Of A Golf Facility—as Evaluated By Superintendents And Other Facility Operators— It’s Still About the Greens and Overall Course Conditions

Q. Importance you feel each of the following aspects of the golf specific offerings at your facility or typical facility, are to its customers.

TOP 3 BOX SUMMARY

MOST IMPORTANT (cont.)	TOTAL			PUBLIC			PRIVATE		
	2021	2020	2019	2021	2020	2019	2021	2020	2019
Aesthetics of the course	74%	67%	69%	69%	65%	68%	79%	69%	70%
Having Multiple tee boxes to accommodate players of varying abilities	66%	63%	70%	69%	63%	68%	67%	63%	70%
Availability of tee times	65%	54%	66%	65%	53%	65%	70%	56%	67%
Having a golf course that can play tough, yet be friendly for all	65%	61%	61%	60%	62%	52%	68%	61%	66%
Reliability of the golf cars	63%	58%	56%	69%	67%	65%	60%	52%	50%



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Golf Facility Market Trend Watch

Least Important Offerings For Customers Of A Golf Facility—as Evaluated By Superintendents And Other Facility Operators—Are Generally Not Golf Course Related

Q. Importance you feel each of the following aspects of the golf specific offerings at your facility or typical facility, are to its customers.

TOP 3 BOX SUMMARY

LEAST IMPORTANT	TOTAL			PUBLIC			PRIVATE		
	2021	2020	2019	2021	2020	2019	2021	2020	2019
Presence of signature hole or holes	19%	21%	19%	17%	23%	17%	20%	19%	20%
Quality of service in the locker room facilities	26%	29%	27%	4%	17%	14%	37%	40%	35%
Attractiveness of the locker room facilities	26%	21%	24%	19%	13%	12%	30%	28%	32%
Merchandise selection in the golf shop	29%	24%	30%	32%	20%	22%	28%	27%	32%
Merchandise quality in the golf shop	30%	32%	33%	23%	23%	28%	34%	39%	34%



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Least Important Offerings For Customers Of A Golf Facility—as Evaluated By Superintendents And Other Facility Operators—Are Generally Not Golf Course Related

Q. Importance you feel each of the following aspects of the golf specific offerings at your facility or typical facility, are to its customers.

TOP 3 BOX SUMMARY

LEAST IMPORTANT (cont.)	TOTAL			PUBLIC			PRIVATE		
	2021	2020	2019	2021	2020	2019	2021	2020	2019
Condition of the rough	36%	33%	42%	27%	25%	37%	39%	40%	48%
Condition of the cart paths	36%	27%	25%	27%	27%	26%	41%	28%	25%
Having a golf course that is known as strategically superior	38%	43%	43%	27%	38%	28%	42%	47%	52%
Quality of instruction/golf lessons	40%	36%	30%	29%	32%	20%	47%	40%	37%
Golf Tournaments and golf events programming	44%	49%	46%	38%	48%	45%	51%	49%	46%

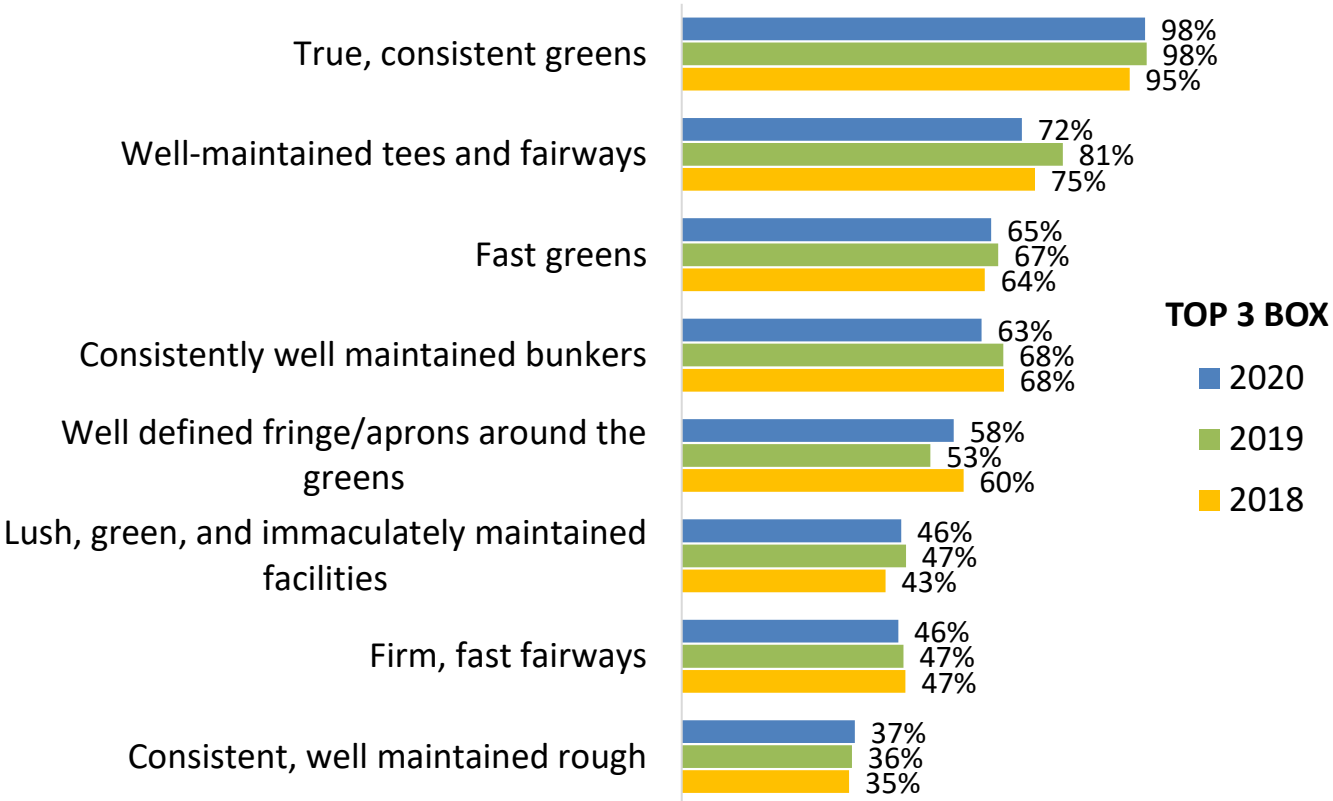


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Golf Facility Market Trend Watch

Conditioning Priorities Perceived As Most Important For Golfers: Greens and Fairways Again Top the List With New Question Structure

Q. Considering each of the following course conditions, please rank them in order of preference that you believe golfers would have.



2021 Incidence of top 5 ranking	
True, consistent greens	99%
Well-maintained tees and fairways	94%
Fast greens	74%
Consistently well maintained bunkers	68%
Firm, fast fairways	64%
Well defined fringe/aprons around the greens	47%
Lush, green, and immaculately maintained facilities	32%
Consistent, well maintained rough	30%



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Conditioning Priorities Perceived As Most Important For Golfers: Standards Vary By Facility Type

Q. Considering each of the following course conditions, please rank them in order of preference that you believe golfers would have.

RANKED TOP 5	PUBLIC	PRIVATE
	2021	2021
True, consistent greens	100%	100%
Well-maintained tees and fairways	97%	95%
Fast greens	81%	77%
Firm, fast fairways	61%	72%
Consistently well maintained bunkers	54%	63%
Well defined fringe/aprons around the greens	49%	48%
Consistent, well maintained rough	49%	18%
Lush, green, and immaculately maintained facilities	25%	29%



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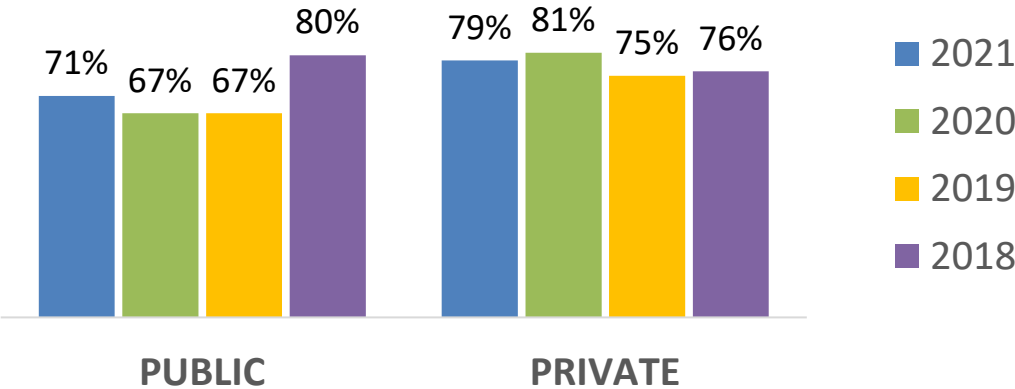
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Facility Management Remains More Satisfied With Recent Golf Course Renovations; Overall Satisfaction Stable

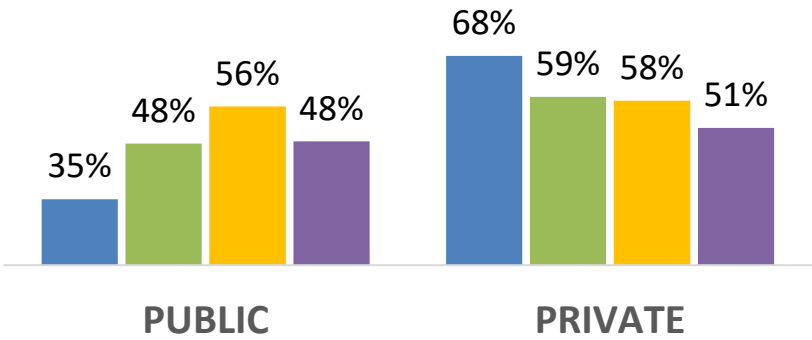
Q. And overall how satisfied were you with the investment you made on your most recent renovation?

TOP 3 BOX SUMMARY

Golf Course Renovation or Addition



Clubhouse Renovation or Addition





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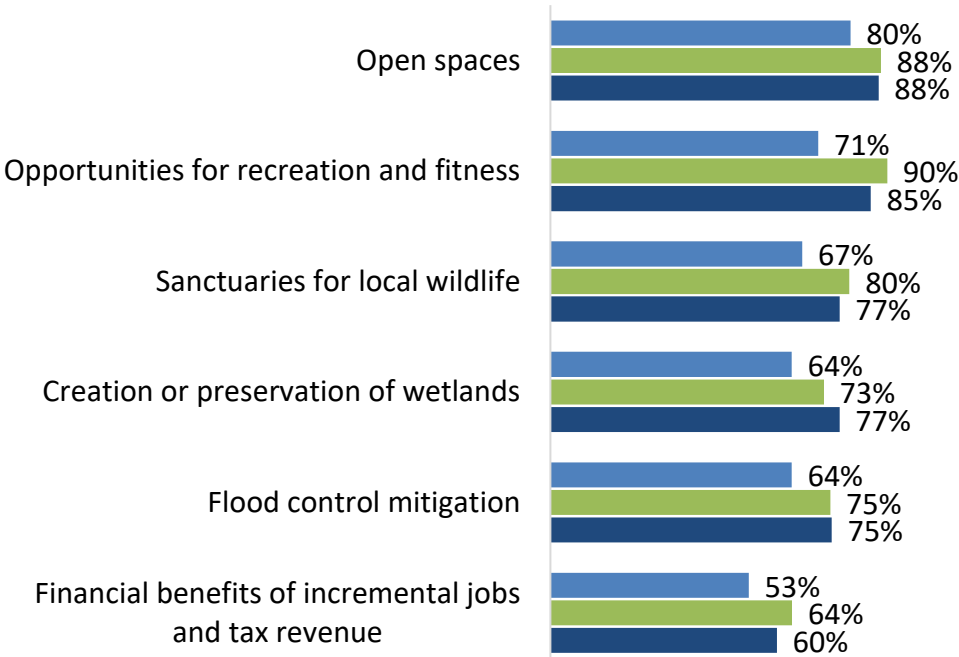
Golf Facility Market Trend Watch

Architects and Superintendents More Aligned in their Thoughts on the Most Value Additive Aspects of Golf Courses

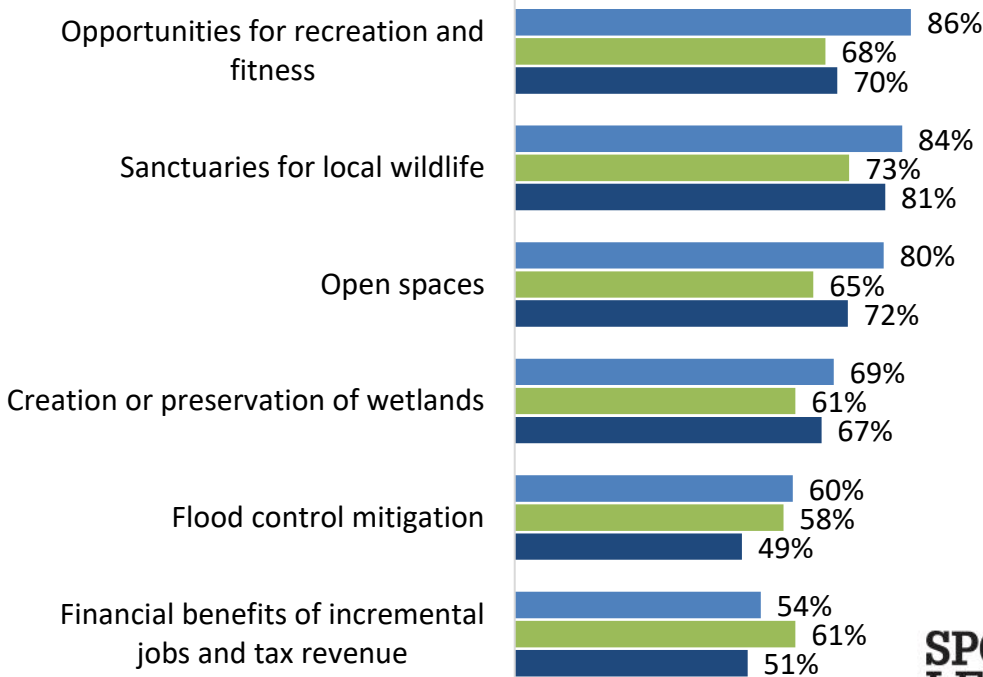
Q. Please indicate how strongly you agree with the following statements.

TOP 3 BOX SUMMARY

Architects



Superintendents



■ 2021
■ 2020
■ 2019



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Golf Facility Market Trend Watch

How Important Would Golfers Find The Following Amenities? Emphasis Remains on Practice Areas

Q. Thinking about the needs of today's golfer/your customers or members, please rank the importance you perceive they would place on each of the following amenities or services.

SUPERINTENDENTS: Top 5 ranking ('21); top 3 box (prior)	2021	2020	2019
A re-design of one or more holes on the golf course	69%	31%	42%
An enhanced practice range	68%	63%	57%
A dedicated short game practice/learning area	68%	63%	53%
Additional tee box options that allow for a shorter golf course	59%	37%	52%
Additional tee box options that allow for a longer golf course	45%	25%	23%
A newly designed, more modern and trendy bar area	40%	37%	35%
Additional, dedicated outdoor event space	33%	39%	41%
A state of the art fitness facility and gym	26%	25%	25%
Additional meeting space	24%	20%	22%
More casual living room space for social interaction	23%	21%	17%



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Golf Facility Market Trend Watch

How Important Would Golfers Find The Following Amenities? Emphasis Remains on Practice Areas

Q. Thinking about the needs of today's golfer/your customers or members, please rank the importance you perceive they would place on each of the following amenities or services.

SUPERINTENDENTS: Top 5 ranking ('21); top 3 box (prior) (continued)	2021	2020	2019
A modern media room with upgraded couches, large screen high definition TVs and abundant computers, tablets, wi-fi access and outlets/connectivity	23%	21%	15%
A casual all day cafe with tea, coffee and appetizers available	15%	11%	19%
A game room	12%	8%	9%
Virtual business address and phone service that can be utilized for receiving mail and telephone calls	10%	9%	15%
A more casual game room with couch areas, conversation pits, the latest video game systems and a library of current titles	9%	11%	5%
A traditional game room with tables and chairs for cards and board games	9%	17%	17%
Premium valet parking service	8%	7%	8%
Additional small private offices to accommodate one to three person meetings and break-outs	6%	9%	6%
A quiet reading room with access to daily newspapers, magazines and tablet devices with access to the same	3%	4%	5%



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Golf Facility Market Trend Watch

How Important Would Golfers Find The Following Amenities? Architects Back in Alignment with Superintendents

Q. Thinking about the needs of today's golfer/your customers or members, please rank the importance you perceive they would place on each of the following amenities or services.

ARCHITECTS Top 5 ranking ('21); top 3 box (prior)	2021	2020	2019
A dedicated short game practice/learning area	92%	78%	83%
An enhanced practice range	90%	76%	81%
Additional tee box options that allow for a shorter golf course	79%	83%	81%
A re-design of one or more holes on the golf course	59%	58%	63%
A state of the art fitness facility and gym	39%	49%	52%
Additional tee box options that allow for a longer golf course	39%	31%	35%
Additional, dedicated outdoor event space	35%	44%	54%
A newly designed, more modern and trendy bar area	27%	42%	50%
A modern media room with upgraded couches, large screen high definition TVs and abundant computers, tablets, wi-fi access and outlets/connectivity	12%	37%	29%
Premium valet parking service	11%	5%	4%



2021 ASGCA-SLRG Golf Facility Market Trend Watch

How Important Would Golfers Find The Following Amenities? Architects Back in Alignment with Superintendents

Q. Thinking about the needs of today's golfer/your customers or members, please rank the importance you perceive they would place on each of the following amenities or services.

ARCHITECTS Top 5 ranking ('21); top 3 box (prior) (continued)	2021	2020	2019
A more casual game room with couch areas, conversation pits, the latest video game systems and a library of current titles	10%	20%	10%
Additional meeting space	9%	14%	15%
Additional small private offices to accommodate one to three person meetings and break-outs	9%	15%	13%
Virtual business address and phone service that can be utilized for receiving mail and telephone calls	7%	19%	8%
A casual all day cafe with tea, coffee and appetizers available	6%	27%	27%
A traditional game room with tables and chairs for cards and board games	6%	9%	15%
More casual living room space for social interaction	6%	22%	27%
A game room	4%	9%	8%
A quiet reading room with access to daily newspapers, magazines and tablet devices with access to the same	4%	5%	6%



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Golf Facility Market Trend Watch

How Important Would Golfers Find The Following Amenities? GMs Remain Aligned with Superintendents and Architects on Practice Areas

Q. Thinking about the needs of today's golfer/your customers or members, please rank the importance you perceive they would place on each of the following amenities or services.

GENERAL MANAGERS Top 5 ranking ('21); top 3 box (prior)	2021	2020	2019
An enhanced practice range	82%	64%	58%
A dedicated short game practice/learning area	77%	68%	53%
A state of the art fitness facility and gym	71%	32%	40%
Additional, dedicated outdoor event space	56%	23%	43%
Additional tee box options that allow for a shorter golf course	54%	46%	70%
Additional tee box options that allow for a longer golf course	50%	18%	33%
A newly designed, more modern and trendy bar area	47%	32%	60%
A re-design of one or more holes on the golf course	43%	32%	18%



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Golf Facility Market Trend Watch

How Important Would Golfers Find The Following Amenities? GMs Remain Aligned with Superintendents and Architects on Practice Areas

Q. Thinking about the needs of today's golfer/your customers or members, please rank the importance you perceive they would place on each of the following amenities or services.

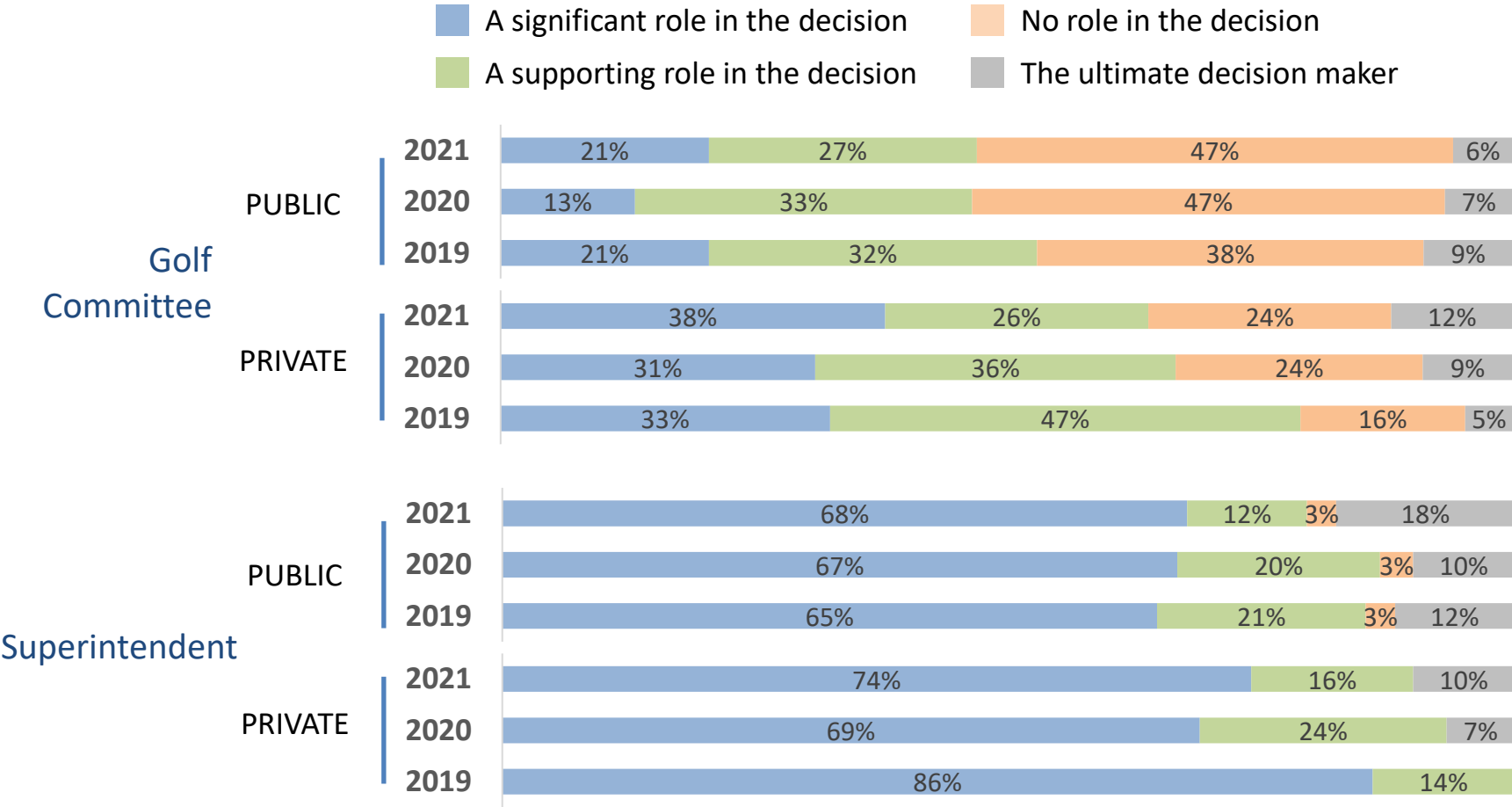
GENERAL MANAGERS Top 5 ranking ('21); top 3 box (prior) (continued)	2021	2020	2019
A casual all day cafe with tea, coffee and appetizers available	36%	9%	38%
More casual living room space for social interaction	20%	18%	43%
Additional meeting space	15%	18%	28%
Virtual business address and phone service that can be utilized for receiving mail and telephone calls	9%	18%	25%
A game room	8%	9%	23%
Additional small private offices to accommodate one to three person meetings and break-outs	7%	5%	10%
A modern media room with upgraded couches, large screen high definition TVs and abundant computers, tablets, wi-fi access and outlets/connectivity	7%	23%	30%



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Golf Facility Market Trend Watch

Who Plays the Key Decision Making Role For Golf Course Renovations?



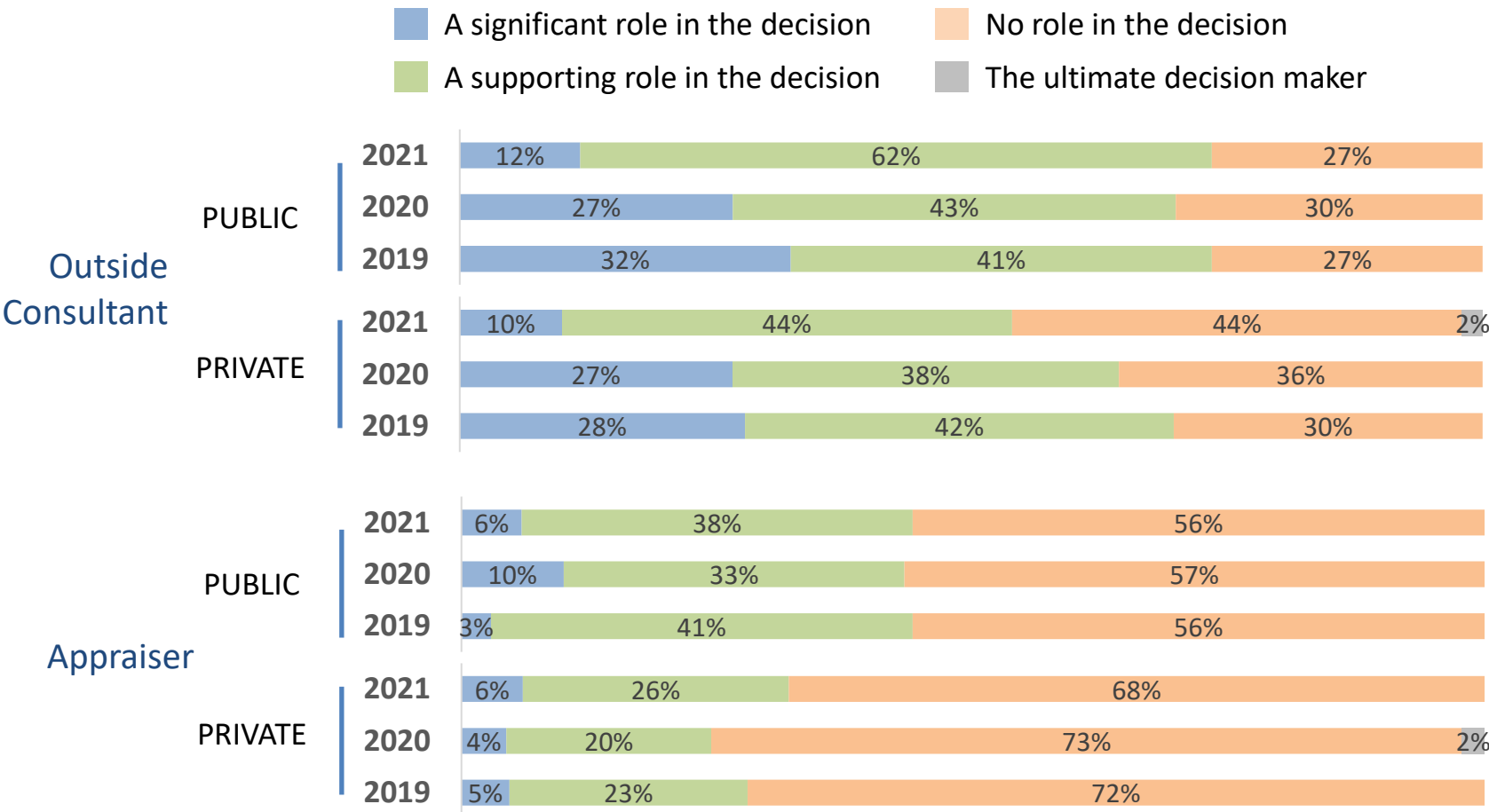
Note: No data label indicates <2%



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Golf Facility Market Trend Watch

Who Plays the Key Decision Making Role For Golf Course Renovations?



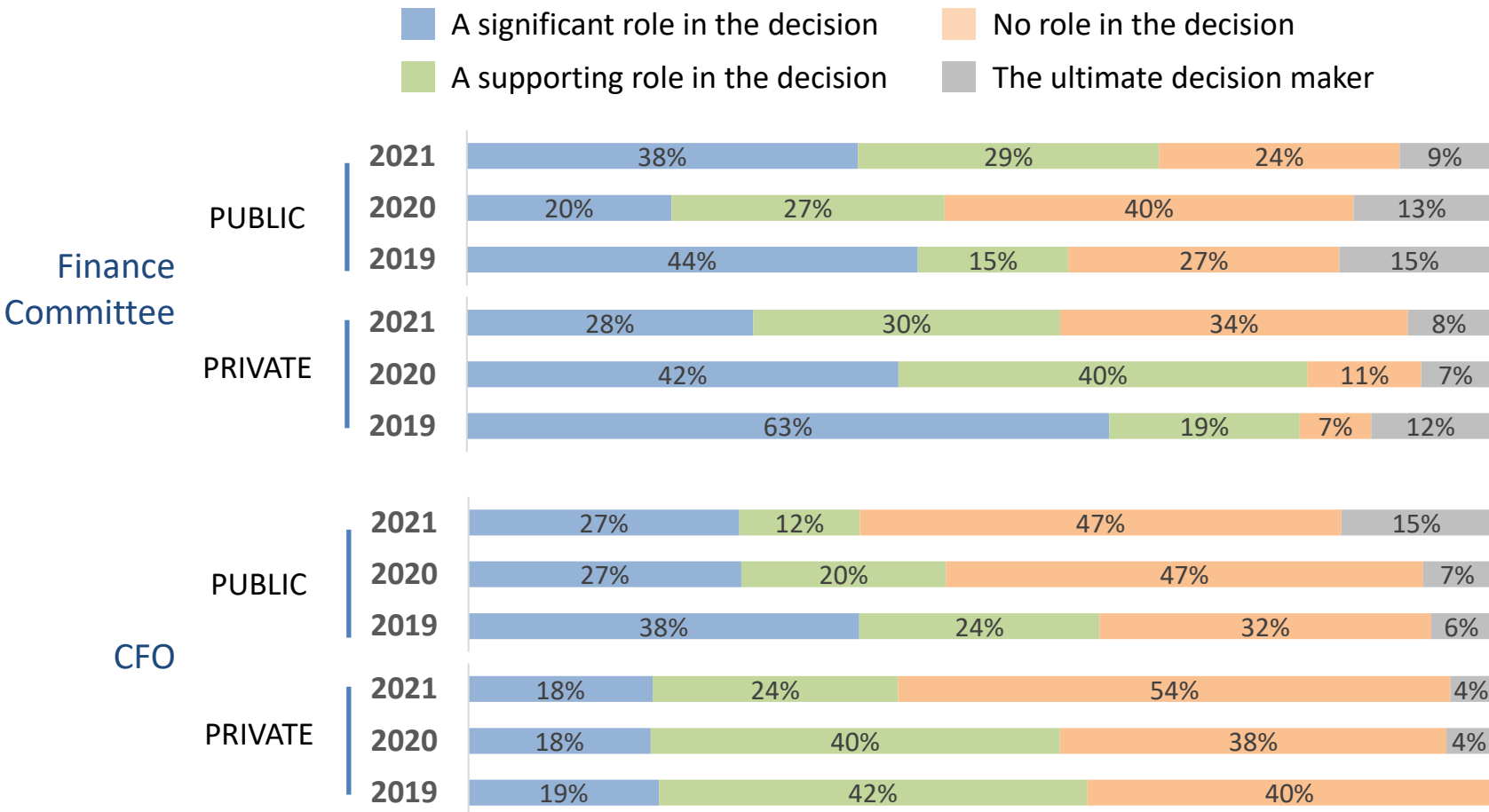
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Golf Facility Market Trend Watch

Who Plays the Key Decision Making Role For Golf Course Renovations?



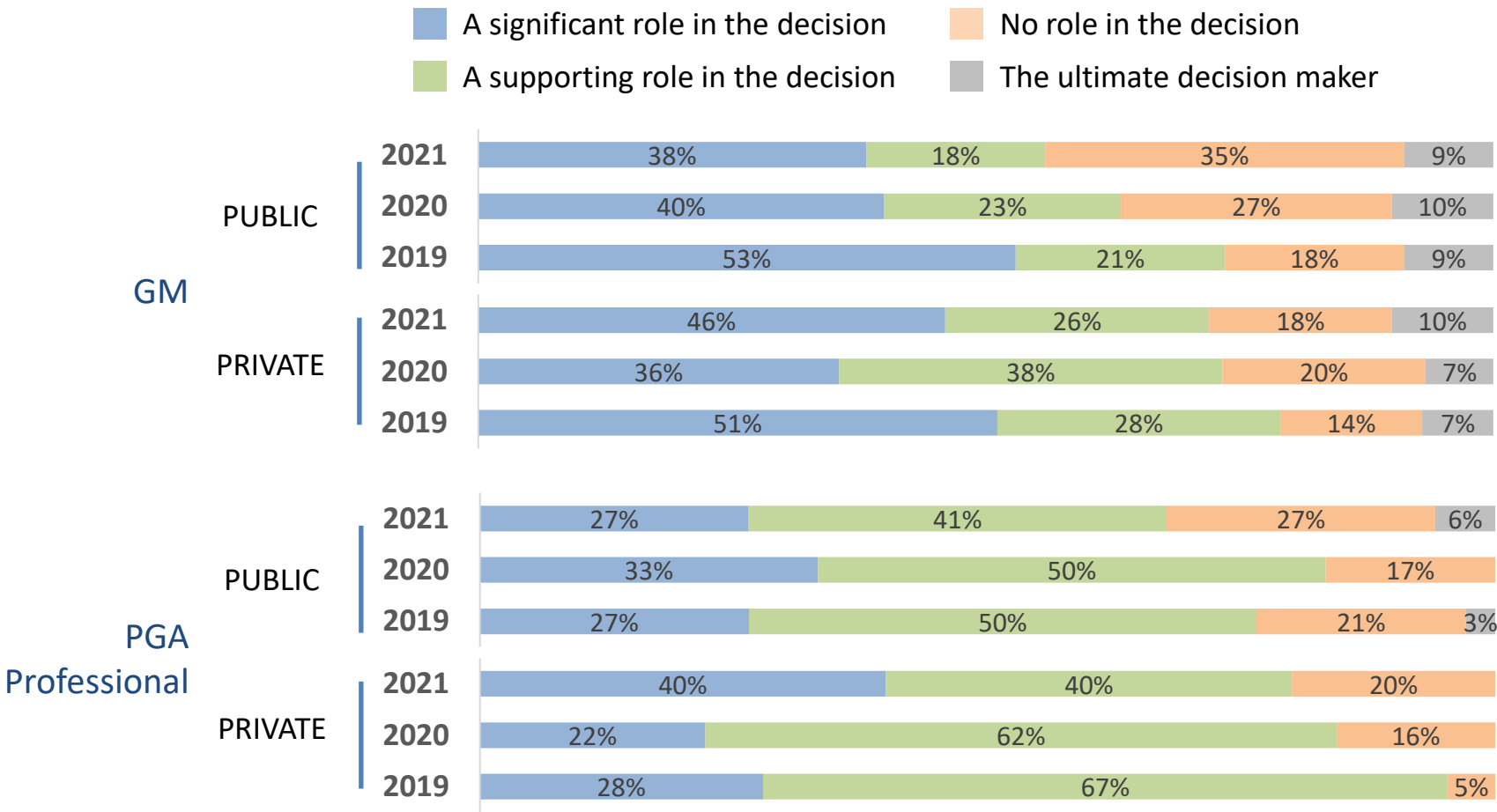
Note: No data label indicates <2%



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Golf Facility Market Trend Watch

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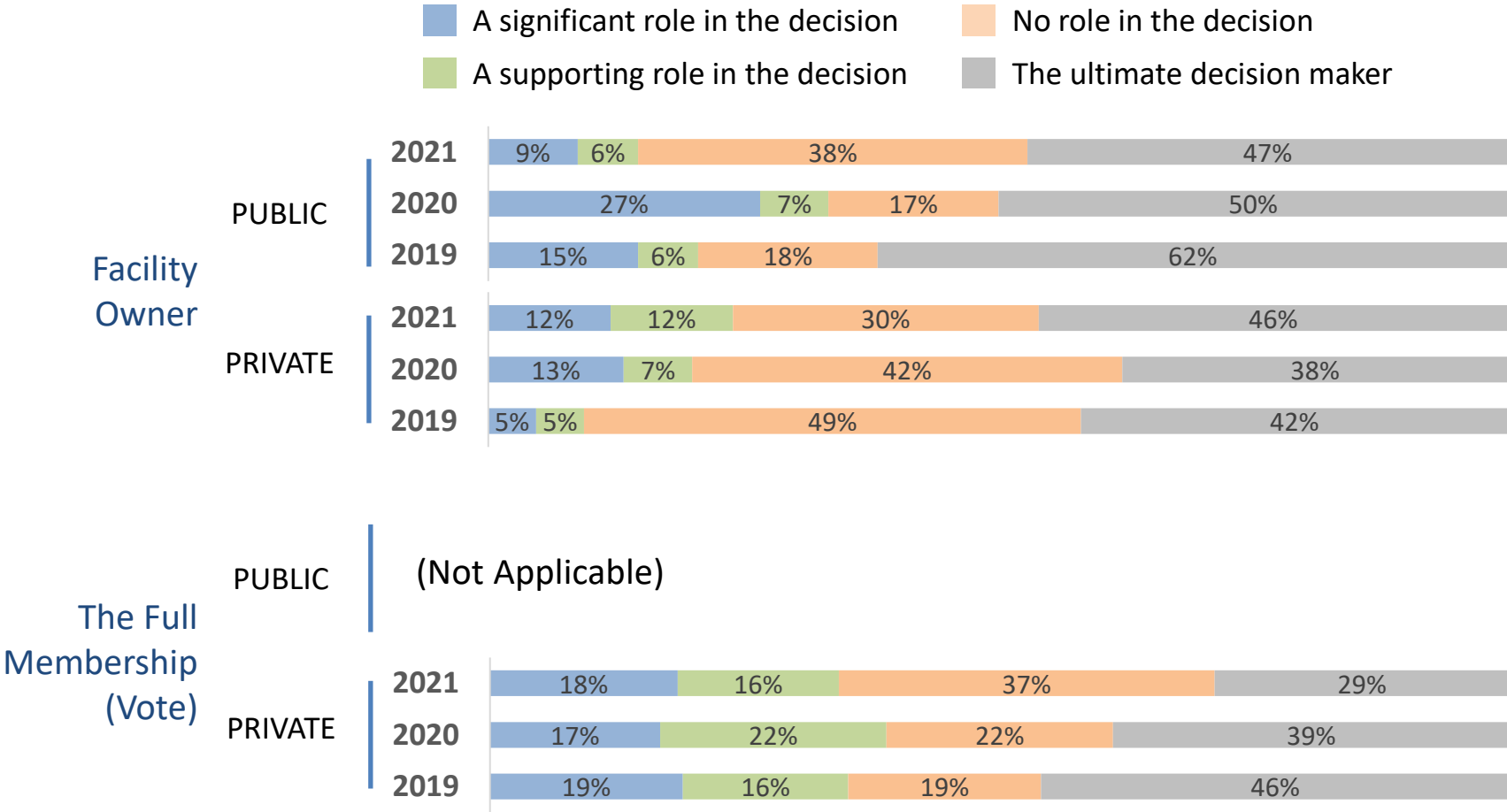
Note: No data label indicates <2%



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Golf Facility Market Trend Watch

Who Plays the Key Decision Making Role For Golf Course Renovations?



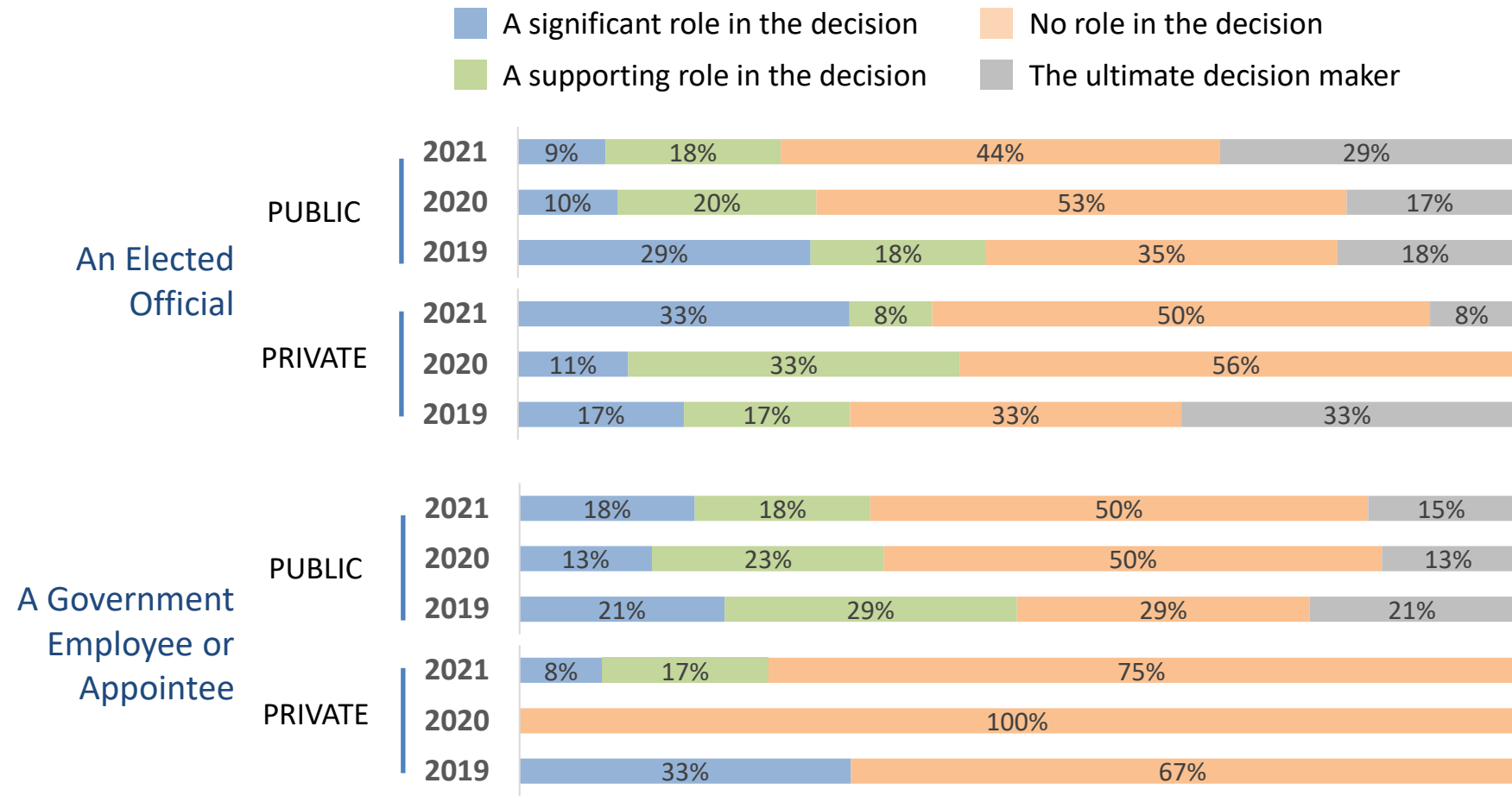
Note: No data label indicates <2%



2021 ASGCA-SLRG

Golf Facility Market Trend Watch

Who Plays the Key Decision Making Role For Golf Course Renovations?



Note: No data label indicates <2%

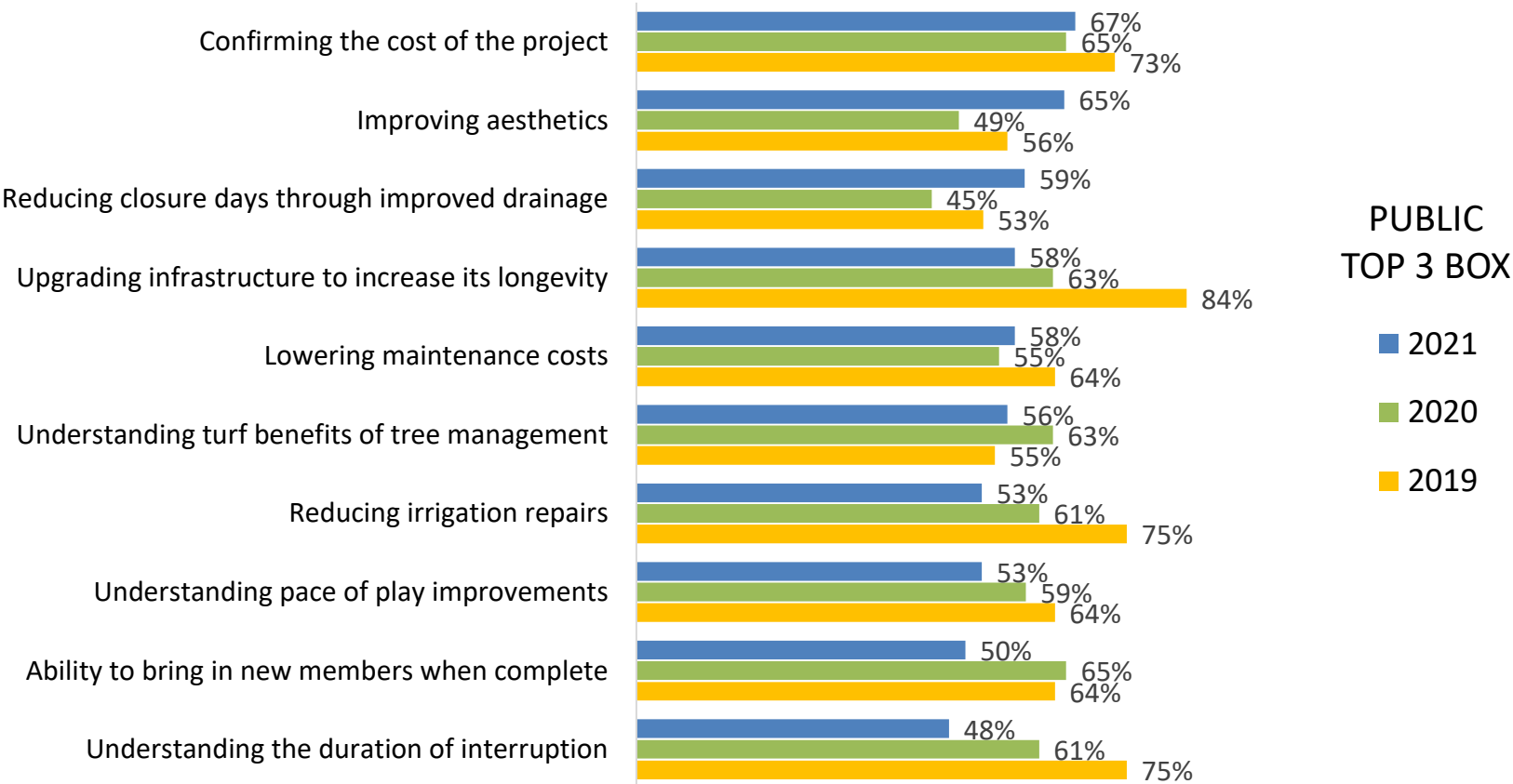


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Golf Facility Market Trend Watch

Most Important Factors For Facility Management To Pull The Trigger For a Renovation Or Remodel

Q. Importance of each of the following factors for facility management, in pulling the trigger for a renovation/remodel of a golf course(s).



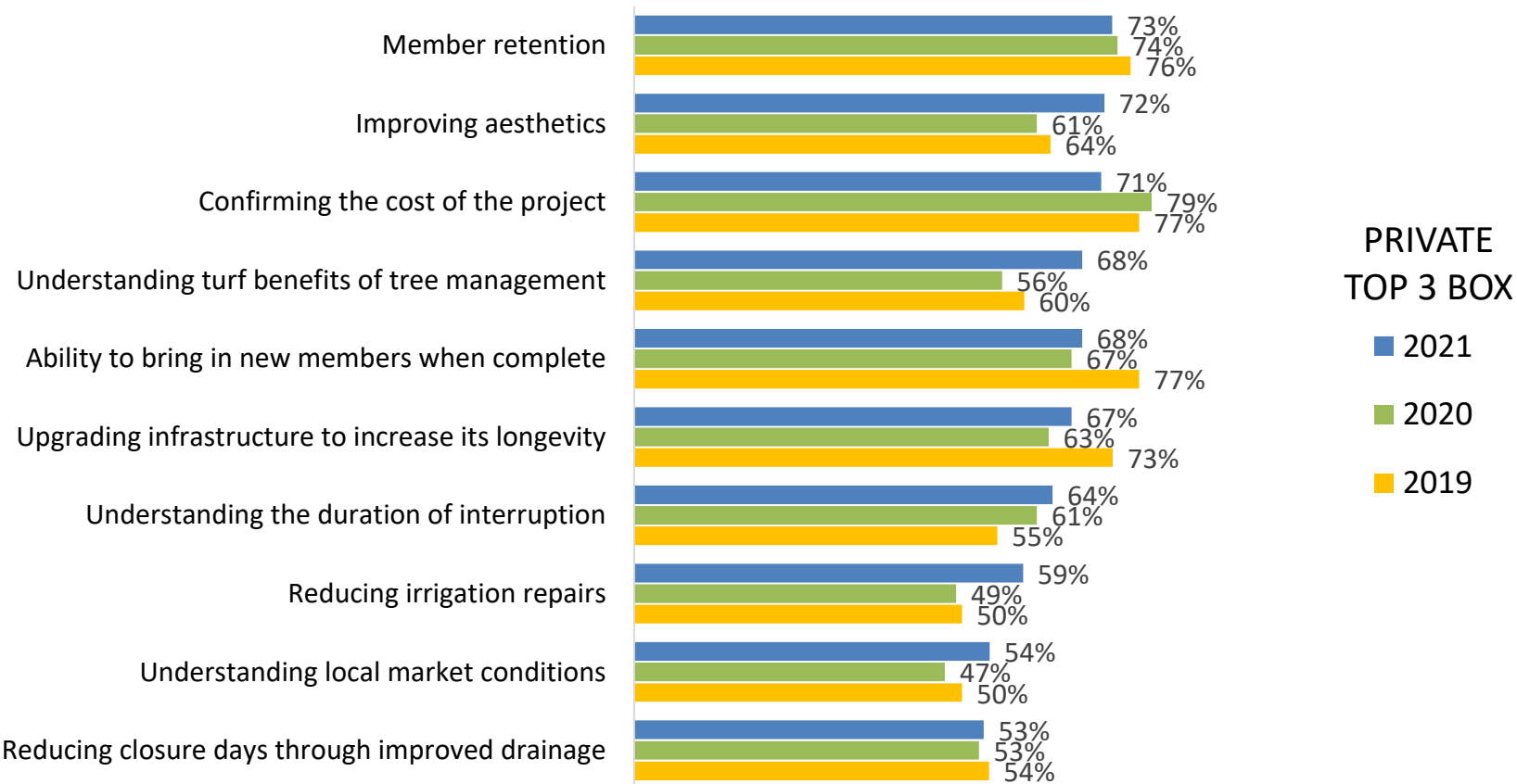


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Golf Facility Market Trend Watch

Most Important Factors For Facility Management To Pull The Trigger For A Renovation Or Remodel

Q. Importance of each of the following factors for facility management, in pulling the trigger for a renovation/remodel of a golf course(s).

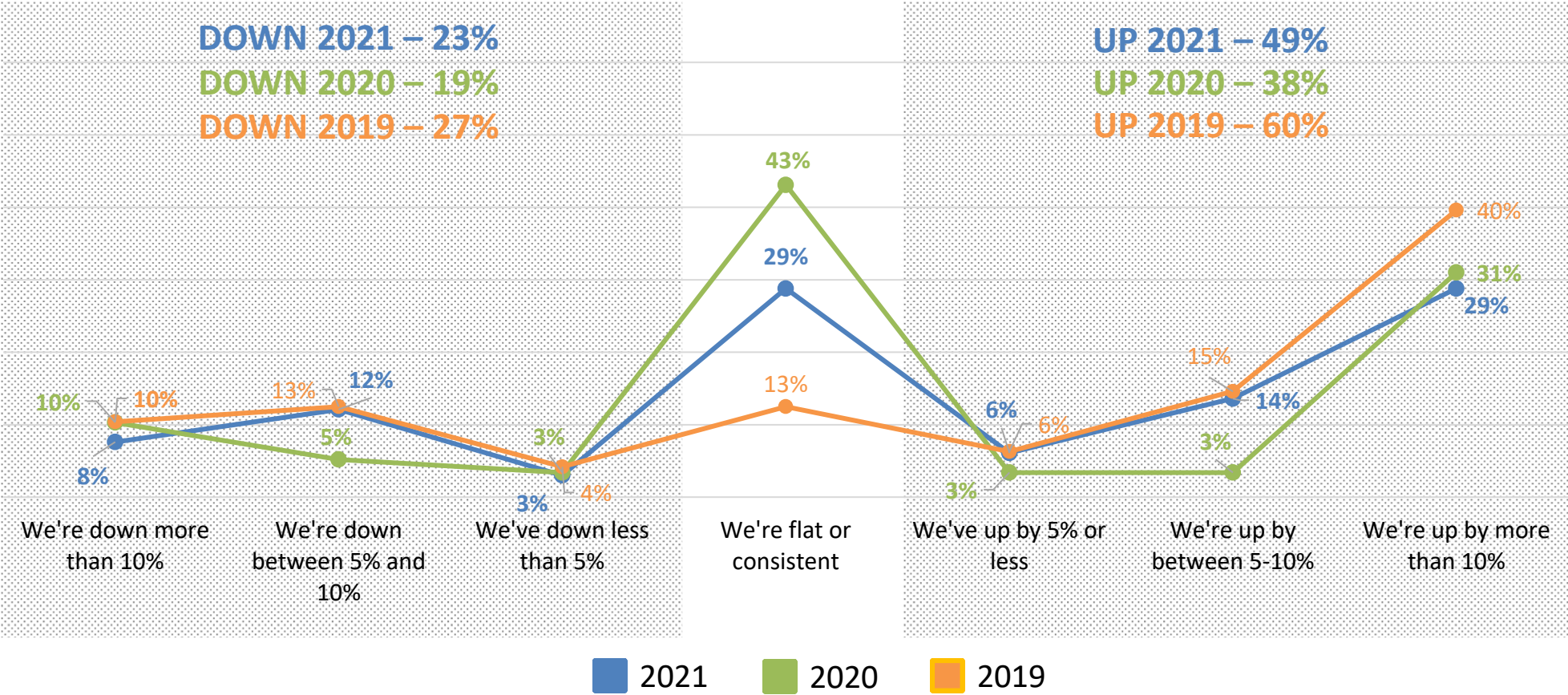




2021 ASGCA-SLRG Golf Facility Market Trend Watch

A Rebound Year for Revenue Among Golf Course Architects

Q. Which best describes the volume of renovation revenue that you've had, over the past 24 months?



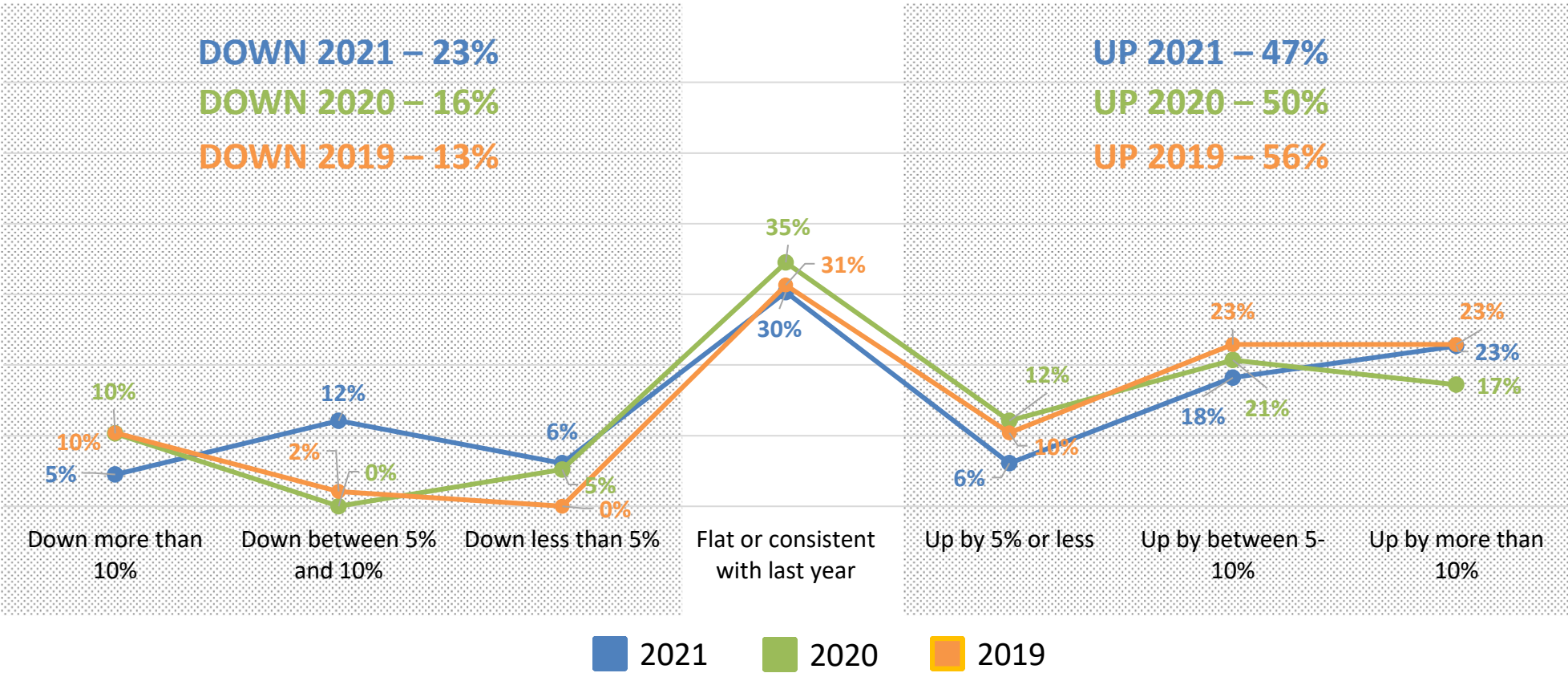


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Golf Facility Market Trend Watch

Revenue Expectations for the Next Two Years for Architects is More Cautious

Q. And which best describes your expected volume of renovation revenue over the next 24 months?



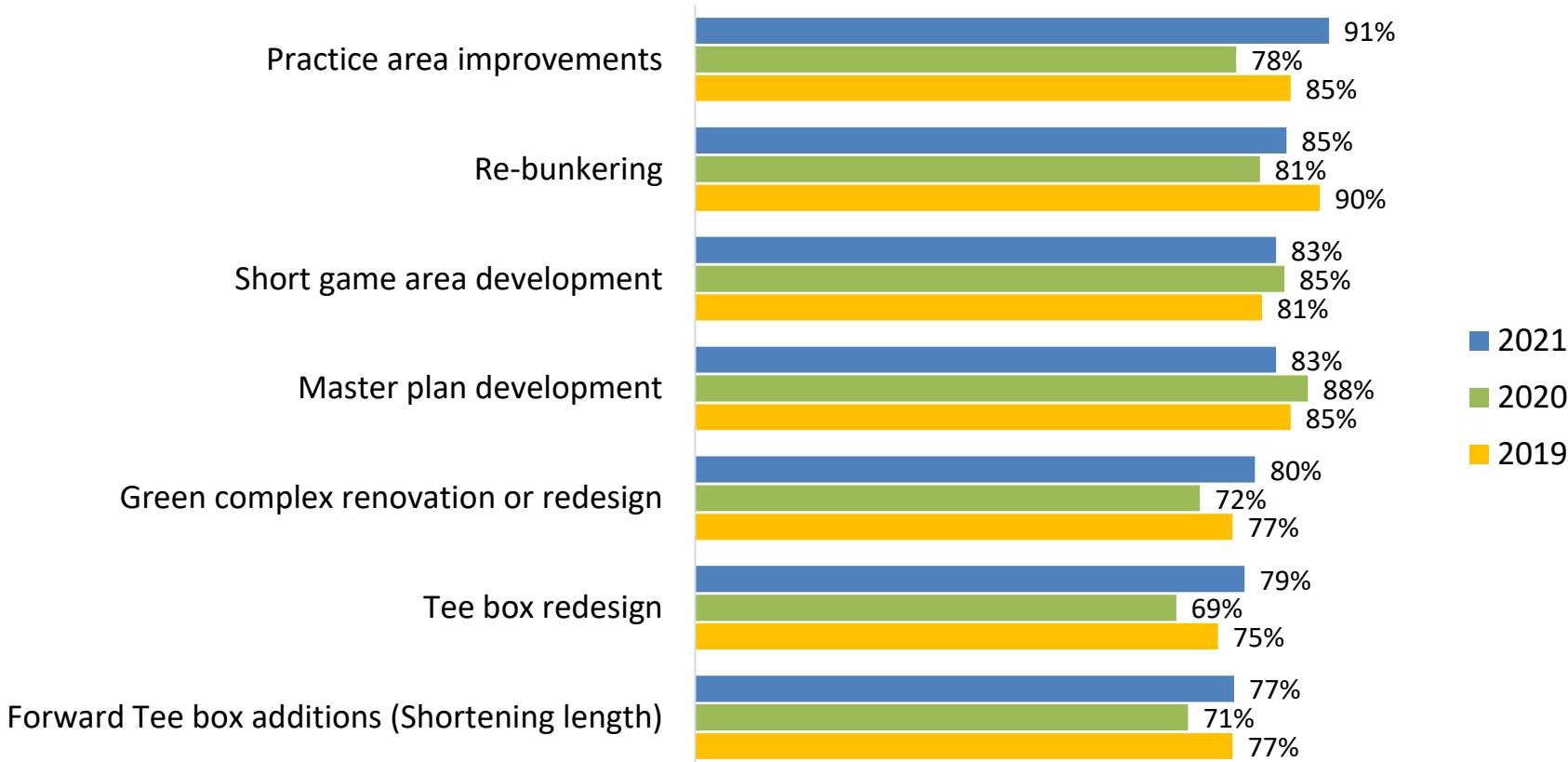


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Golf Facility Market Trend Watch

Practice Area Improvements is the Most Prevalent Type of Project for Architects; Master Plan Development Falls to Third

Q. Please indicate which of the following you have been involved with over the past 24 months



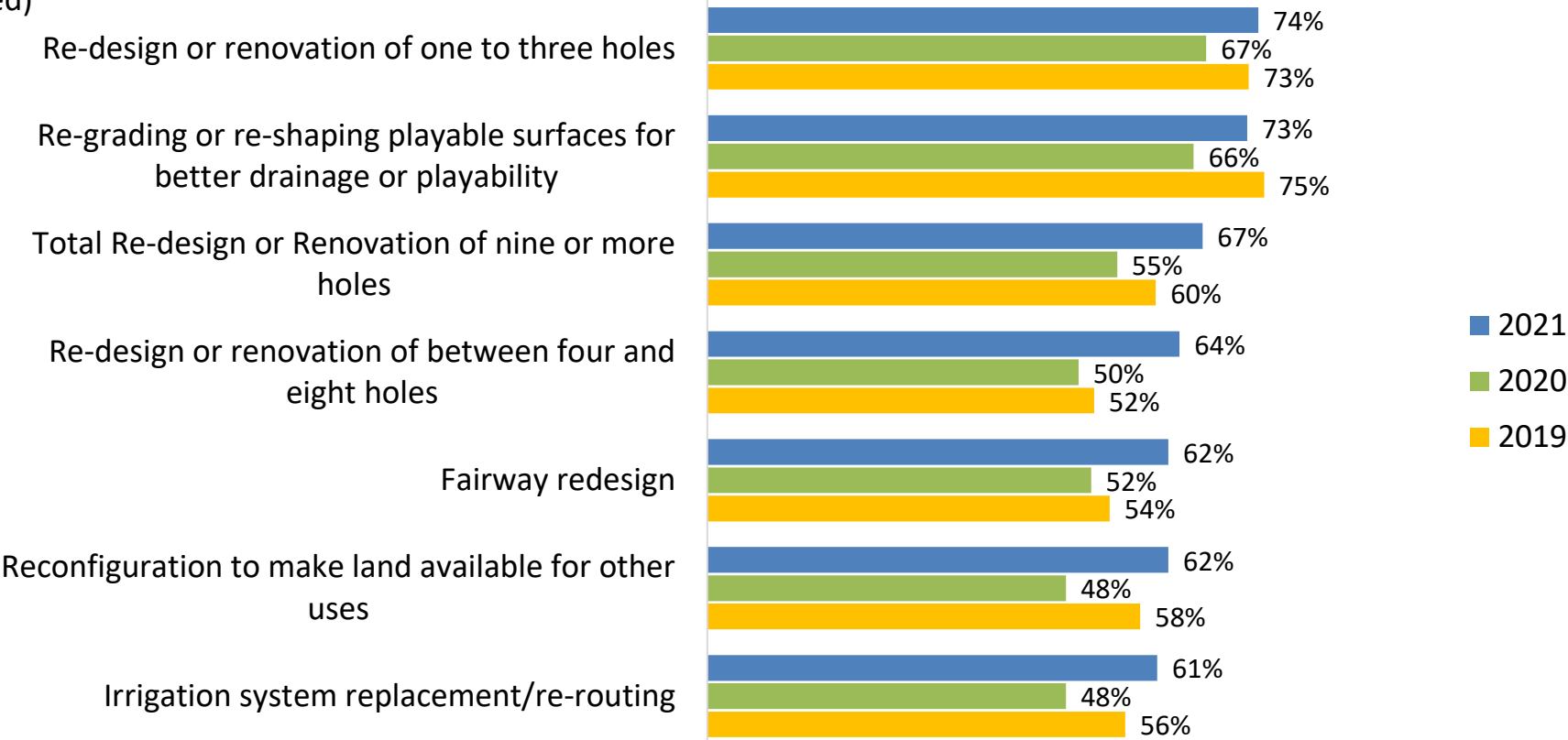


2021 ASGCA-SLRG Golf Facility Market Trend Watch

Practice Area Improvements is the Most Prevalent Type of Project for Architects ; Master Plan Development Falls to Third

Q. Please indicate which of the following you have been involved with over the past 24 months

(continued)



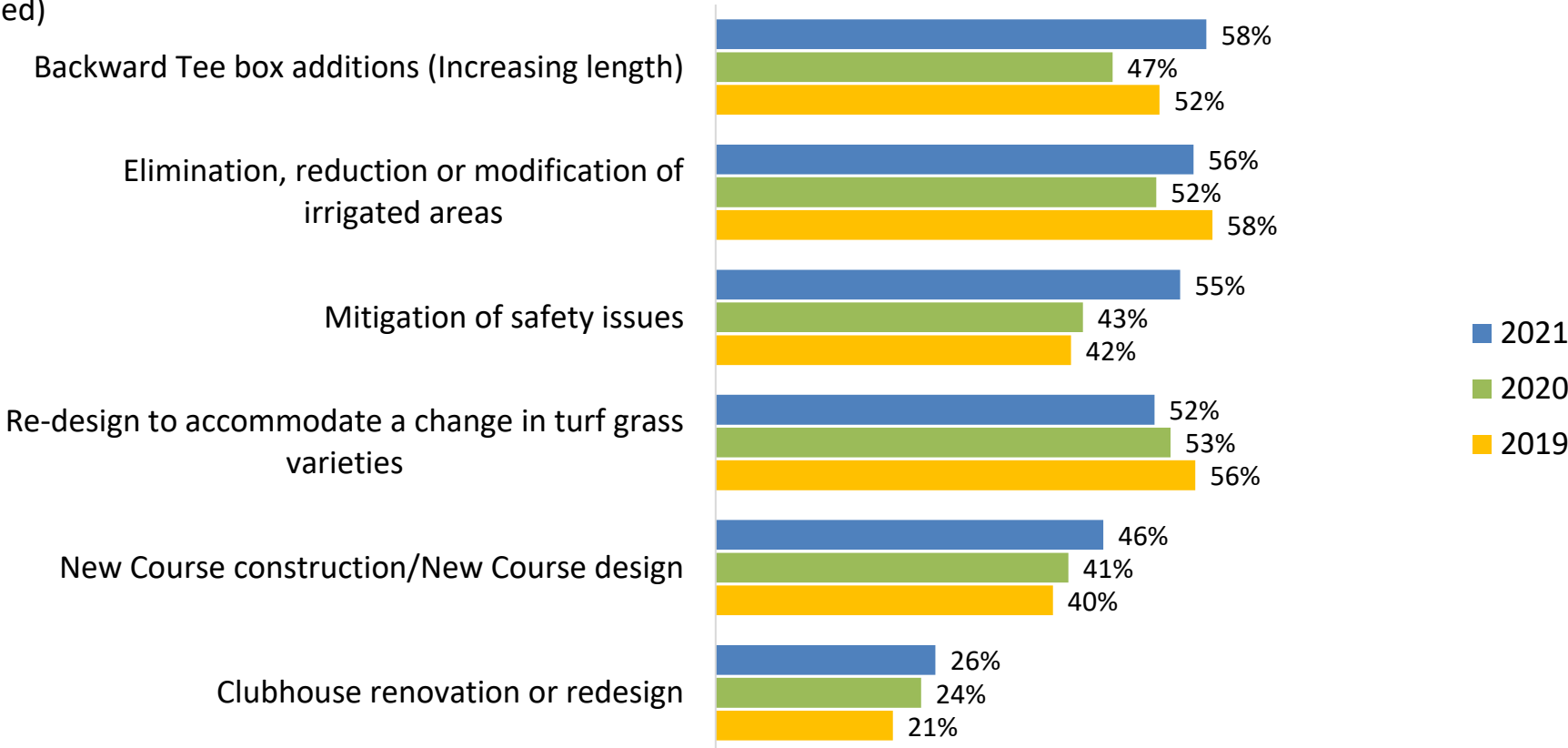


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Practice Area Improvements is the Most Prevalent Type of Project for Architects; Master Plan Development Falls to Third

Q. Please indicate which of the following you have been involved with over the past 24 months

(continued)





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Golf Facility Market Trend Watch

Total Re-Designs, New Course Construction, and Re-Bunkering are Now Greatest Revenue Drivers, Unseating Master Plan Development

Q. For each of these aspects of your business activity that you've engaged in over the past twenty-four months, please rank them according to the activity generating the greatest amount of project volume.

ARCHITECTS – RANKED #1 SUMMARY	2021	2020	2019
Total Re-design or Renovation of nine or more holes	23%	12%	20%
New Course construction/New Course design	18%	17%	7%
Re-bunkering	16%	8%	17%
Master plan development	12%	12%	17%
Tee box redesign	9%	2%	-





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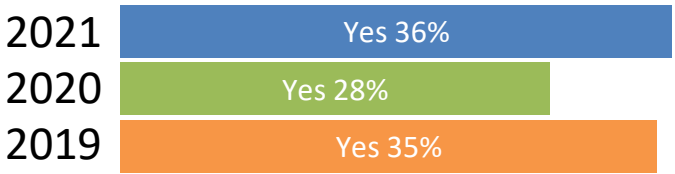
Golf Facility Market Trend Watch

Two Thirds of Facility Respondents Do Not Have Any Non Essential or Artificial Water On the Golf Course

- Little interest in their removal to reduce water usage

Q. Does your golf facility have any non essential/artificial water on the golf course?

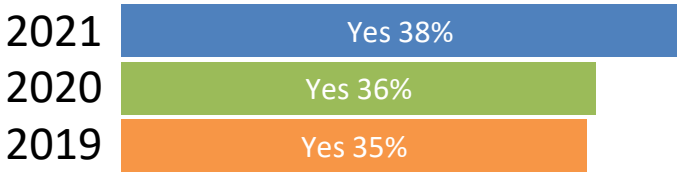
PUBLIC



TOP 3 BOX 2021 – 7%
TOP 3 BOX 2020 – 0%
TOP 3 BOX 2019 – 5%

We are interested in exploring the removal of ponds, lakes and streams that are artificial, in an effort to reduce water usage at our facility

PRIVATE



TOP 3 BOX 2021 – 10%
TOP 3 BOX 2020 – 5%
TOP 3 BOX 2019 – 6%

PUBLIC	2021	2020	2019
Mean total acreage reported	96.9	142.2	131.3
Percent of total acreage irrigated	56.8%	58.0%	65.2%

PRIVATE	2021	2020	2019
Mean total acreage reported	100.9	113.9	119.0
Percent of total acreage irrigated	71.9%	65.9%	66.2%