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Streamsong Resort: the world's greatest piece of corporate social responsibility?



The three ages of Asian golf



Malaysian developer banks on golf

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Dana Garmany, Troon boss explains how he went global; **Guacalito de la Isla**, Kidd rediscovers his sense of fun; **Roving superintendent**, Jason Chennault reports from Mongolia; **Mountain retreat**, Kirby builds in Dolomites

Asian golf's three ages

Atlas Turf president John Holmes says it is a mistake to regard Asia as one market for golf

Asia is golf's most promising growth opportunity. But a continent the size of Asia cannot be considered as one market, any more than Europe or the Americas could. If golf is to achieve its potential in Asia, the industry needs to understand how the game fits, culturally and environmentally into the different countries of the continent.

Over the span of two decades, I've taken part in golf's growth and development in almost every Asian country. The landscape of golf history and progress there is as varied and unique as the countries themselves. I believe there are essentially three different types of golf market in Asia. Each has its characteristics; each needs its own development strategy.

The first group can be characterised as those with a long-standing, usually colonial, tie to golf. The best example here is India, but Myanmar (Burma) fits too, despite being less well known.

Golf in India dates back to the 19th century; indeed, golf was established in India before it had spread in any significant way from Scotland to England or Ireland. The Royal Calcutta club, founded in 1829, predates any English club, with the exception of Royal Blackheath, whose history is complex, and Bangalore Golf Club, dating from 1876, is the oldest course outside the UK still on its original site.

Most Indian courses have a military connection. For the most part, these courses were designed with simple layouts – flat with few bunkers and minimal challenge. Maintenance practices are similar to those used 40-50 years ago in the UK or US, with outdated equipment, hand labour and very little use of modern fertilisers and pesticides. The likelihood of these courses being renovated is slim due to lack of financial resources and space constraints.

The few old courses that have been renovated are mostly private clubs. Like the military courses, these battle severe space constraints. There is often insufficient

room to lengthen courses to adjust to modern playing equipment, and mobilising construction equipment on site is difficult due to tight roads and traffic. A good example is the Bombay Presidency Club in Mumbai. Without room to lengthen, the club rebuilt and recontoured greens and added bunkers, using our Platinum TE Paspalum on the greens.

New golf in India has been driven by real estate development. Many new courses are nine holes, due to the difficulties of acquiring land. For example, the DLF Golf and Country Club in Gurgaon outside Delhi is currently undergoing a nine hole expansion, led by Gary Player's firm, and using our Celebration and MiniVerde bermudagrasses. When completed, it will be on the same level, agronomically, as any modern course. The Indian industry is challenged by lack of access to certain products, because of import restrictions, but there is a grassroots drive to improve the education of turf professionals and also to convey the importance of modern maintenance to developers.

Myanmar may be less known as a golf market than India, but it shares many characteristics. The first course in the country was built in 1887, and today it has 127 courses, most built by the British in the early 1900s. Like India, very little renovation work has been done. This is not surprising considering the history of political unrest and the resulting lack of tourism, but with the political situation becoming more stable, the hope among local enthusiasts and the outside golf world is that golf development will begin soon. Groundwork is being laid by groups such as the R&A and the Asian Golf Industry Federation funding golf professional training programmes. It is, I believe, a place to watch.

The second group of countries, mostly in south-east Asia, saw a golf surge around 20-30 years ago. Starting mostly in the early 1980s, over 400 courses have been built in Malaysia, Thailand, Indonesia and Singapore. Over the past few years, though, many courses in the

region have begun to renovate, forced to do so primarily by the weather. Massive amounts of rain and extensive cloud coverage take their toll on course quality quicker than in regions with milder weather conditions. This extreme weather changes soil chemistry, inhibits growth of turfgrass, causes drainage issue, and erodes parts of the courses, necessitating renovations sooner than in regions with milder climates.

Renovations greatly outnumber new construction in this region, because of the strength of the existing course base. But strong local memberships are driving the need for more modern facilities, as is the rapid growth of golf tourism in the region, especially in Thailand.

Almost every major design firm has a presence in south-east Asia. With more modern construction techniques and advanced materials, courses should last longer before they need to be renovated again. Golf course maintenance quality is higher than in some Asian countries due to the increased availability of local education opportunities. Paspalum has been a popular choice in the region due to its ability to grow well in the low light conditions; many courses are taking advantage of the latest advances in turfgrass coming primarily from the southeastern United States. From a sustainability perspective, the use of local native grasses that were planted on older courses are giving way to new grasses that consume less water and require less fertiliser.

The final group of countries are those where golf has only started to take hold in recent years. China, the prime example, saw its first courses built in the 1980s, but in the last twenty years there has been an explosion in golf construction.

China has the widest variations of project quality anywhere in the world, ranging from the low end in both design and quality to world-class facilities that rival the best in the world. The majority of courses built around major population areas are real estate driven, and architects are able to experiment more with design philosophies here than anywhere

“China has the widest variations of project quality anywhere in the world”

else. This means that design decisions create unique opportunities for turf to become more than an element for playability. Turf becomes a visual, artistic component in the design. Chinese developers often want a ‘western look’ on their courses with a local feel in the clubhouse.

China has huge variations of climate, from tropical to transition zones to pure cool season environments. It is already a huge market: there are an estimated two million golfers in China, and the industry's revenues from courses and equipment were more than US\$8.7 billion in 2011. There are believed to be around 400 courses in the country, and some reckon numbers will double in the next 15 years if current moratoriums are lifted. Piracy in all facets of the golf industry threatens the quality and integrity of the game in China, but increased attention to the issue, collaboration across the industry and greater governmental support show promise for improvement.

The other key ‘new’ golf country is Vietnam. Here, golf is geared mostly toward tourism, and developers have focused on making use of the country's extensive coastline – sites not on the coast can be difficult to build on because of the soils and weather conditions. Vietnam can experience heavy rains throughout the year, leading to maintenance challenges. Paspalum has proven to be successful in these conditions.

Foreign investment, particularly from South Korea, is driving golf development, and airline access to remote areas is boosting golf growth. Vietnam has 29 open courses and at least 20 in some form of development. The central coast between Danang and Hoi An is becoming a golf tourism destination. But it is not just about tourism: Twin Doves, Vietnam's first private members' club, opened in December 2011. This Peter Rousseau design is grassed wall-to-wall with our Platinum TE Paspalum. **GCA**

John Holmes is president of Atlas Turf International, a worldwide distributor of cool and warm season turfgrasses and is on the board of the Asian Golf Industry Federation.



Holmes (top) says that Twin Doves (middle) is evidence of the increasing maturity of the Vietnamese golf market. Bottom: The Dunes