

# NGF

## Assessment and Recommendations for Jekyll Island Authority Golf Program

Prepared for  
**Jekyll Island Authority**



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## Introduction

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# Introduction

- National Golf Foundation
  - Municipal golf facility consulting
  - NGF Staff – Richard Singer
  - **Not advocate for any position other than Jekyll Island Golf Club success**
- Why we're here:
  - Re-start the golf improvement planning
  - Provide the Authority with an up-to-date strategic review of the golf club
  - Evaluation of proposed property enhancements in light of new economic and market realities
  - Analysis of the physical and economic condition of the club and its market environment

## NGF Activities

- Re-evaluated the full 2017 NGF report and all options addressed for site improvement;
- Reviewed the “Jekyll Island Authority Golf Master Plan” led by Vincent Golf Design;
- Met with senior JIA officials and on-site senior golf staff to review alternatives for implementation of a new plan of improvements for the golf course.
- Extensive updated NGF market analysis

## Background and Review of NGF's 2017 Report

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### Basic 2017 Findings

- JIGC includes aspects that are consistent with success in public golf, however:
  - Improvements were needed in golf course infrastructure (irrigation, drainage, turf, maintenance, etc.)
  - The golf clubhouse needs expansion and/or modernization
  - Golf maintenance staff not ideal
  - 63 holes was likely not sustainable and JIA should be prepared to consider a reduction to 54 or even 45 holes
- JIGC needed upgrade to match other Island services and amenities that had been enhanced

## Changes and JIA Activities Since 2017

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### Changes Since 2017

- 2018-2019 a formal *Golf Master Plan* completed
- Vincent Golf Design recommended:
  - Enhanced championship golf (36-H)
  - New “short” courses (18 or 27-holes)
  - Expanded golf practice amenities
  - Modernized clubhouse
  - Enhanced conservation area
  - A new “boutique” lodge
- Plans were put on hold in 2020 to complete a more comprehensive Island-wide master plan

## Changes and JIA Activities Since 2017

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### **Updated 2022 Market Analysis**

- The Covid-19 pandemic had a positive impact on golf demand, and this improvement was felt at all area golf facilities, including Jekyll Island GC
- Two new Marriott hotels were added on Jekyll Island and automobile transportation through the Island's main gate reached 1.45 million in 2021 (25% increase over 2020)
- Overall balance between demand and supply for golf in S.E. Georgia remains unfavorable to golf courses (rounds per 18-H remains low)
- Tourist participation remains critical to JIGC
- Still challenges in inflation, unexpected events and attracting younger players

## Changes and JIA Activities Since 2017

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### Competitive Golf Facilities

- Recent surge in demand in the regional golf market has led to increases in golf playing fees
- All of JIGC's competitors have increased both daily play and membership fees, leaving a defined niche for JIGC

*Sea Island*

**SEA PALMS**  
• ST. SIMONS •

*Sanctuary Golf*  
**GOLDEN ISLES**  
of Georgia

## 2022 Update – Basic Operating Structure

- Jekyll Island GC remains in direct operation by the Jekyll Island Authority
- The only change from 2017 is that the Authority no longer operates F&B service as a separate enterprise (formerly known as McCormick's Grill) in favor of a new concession / lease agreement with Tribuzio's Grille.
- Appears to have helped improve the overall financial picture for JIA



## 2022 Update - Financial Analysis

- JIGC produced total top-line revenue of just over \$2.5 million in FY2021 – could reach \$2.9 million in FY2022
- Total rounds hosted by the facility reached over 63,700 in 2021, the most in any year since 2017 but still less than 2014-15
- Total number of members increased to 273 from only 145 in 2017, an 88% increase in just five years
- JIGC continues to run with a deficit on operations of around **(\$300,000+)** due mostly to a large and growing labor budget and rapidly increasing maintenance costs

## 2022 Update - Physical Plant

While there has been some improvement, the challenges identified by NGF in 2017 remain mostly un-resolved in 2022:

- **Pine Lakes (PL)** remains in the best condition of the three 18-hole golf courses, but has some specific irrigation, turf, tree and cart path issues that must be addressed.
- **Oleander (OL)** is lower lying than the others and has a tendency to retain water and wet conditions, thus limiting activity and desirability. There are also other environmental concerns related to tidal maintenance and water flow. The irrigation system was last improved in 1981, and is well beyond the 30-year expected useful life. Improvements to OL likely to be very expensive.

2022 Update

## 2022 Oleander Visuals



## 2022 Update - Physical Plant

- **Indian Mound's (IM)** irrigation system is the oldest of the three 18-hole courses, dating back to 1975 and well past its expected useful life.
- **Great Dunes (GD)** is a 9-hole remnant of a historic 18-hole seaside course from early 1900s with a “links” and appealing characteristics and beautiful ocean views. The 9-hole course has great appeal for golfers seeking a simpler, shorter round of golf and for those seeking a piece of history. The irrigation system on Great Dunes is antiquated and very challenging to operate.
- **The clubhouse (CH)** has seen some improvement with restroom upgrades and other cosmetic fixes. All elements are generally functional, but the facility is deteriorating and has a design more appropriate for a single 18-hole golf course. Other enhancements to HVAC, storage and kitchen remain to be completed.

## 2022 Update - Physical Plant

- Jekyll Island GC includes a small driving range with limited practice amenities and features.
- JIGC has aging buildings to house and charge carts for the operation, located between the 9th and 10th holes on the Oleander course. JIGC is storing 184 carts, and staff is required to bring up carts via tow each morning.
- The maintenance facilities space appeared to be well organized, efficient and included all of the basics required for adequate golf course maintenance, there is need to enhance storage space and modernize the facility.
- Other items noted by NGF and staff include serious drainage and irrigation challenges, environmental concerns, preservation of the Great Dunes course and sustaining the Audubon status for the golf facility.

## Summary of 2022 Findings

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# 2022 Golf Improvement Plan

## Summary of 2022 Findings

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### Guiding Principles for Golf Improvement Planning

1. The Jekyll Island GC needs to be enhanced and modernized.
2. A full complement of 63 holes is not ideal for JIGC.
3. Retaining all 18 holes of the current Oleander golf course is likely not sustainable.
4. Any plan to enhance golf at JIGC will include the Great Dunes course.
5. The buildings that support the JIGC golf operation need to be improved and expanded.
6. Any plan to improve Jekyll Island GC will have to be completed in phases, with **strategic pauses between each major project** to re-evaluate the plan.
7. Some changes in operation are needed to maximize the potential of this property

## Summary of 2022 Findings

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### **Golf Improvement Plan Structure**

The improvements identified by NGF were divided into five primary phases, each focused on a specific amenity

- 1. Pine Lakes Upgrade** – Improve basic features and infrastructure while the course remains open and operating (subject to occasional closures).
- 2. Oleander / Great Dunes Combination and Enhancement** – Create a new 18-hole course using 9 holes of Oleander and merging with 9 holes of Great Dunes to create one unique 18-hole championship golf course. This program has several implications.



## Summary of 2022 Findings

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### Golf Improvement Plan Structure

3. **Structures Upgrade** – This phase will address changes to structures that support the golf facility operation – most notably clubhouse and maintenance facility.
4. **New Indian Mound Program** – After pause and re-evaluation, a key decision for JIA with action contingent on performance of JIGC on 36 holes during Phase 2. IM could become: (1) a full 18-hole enhancement; or (2) some kind of “short” course (possibly only 9 holes).
5. **Comprehensive Pine Lakes Enhancement/Renovation** – This phase will likely be at least 5+ years in the future, and include a more comprehensive upgrade to irrigation and golf features (greens, tees, fairways, shaping, etc.) on the Pine Lakes GC.

## Summary of 2022 Findings

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### **Key implications of Golf Improvement Plan**

- Cart Storage
- 36-Hole Operation
- New Practice Facility
- Conservation Areas
- Retain Great Dunes Course
- Existing Golf Clubhouse
- Golf Lodge
- Golf Maintenance Facilities
- Ultimate Mix of Golf Holes

# Summary of 2022 Findings

## Summary of Phases (FY 2023-2028)

Jekyll Island GC Schedule of Physical Improvements						
	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6
<b>Projects</b>	Ongoing PL fixes (while PL open)	Renovate O/GD, evaluate capacities	Structures Project	Strategic pause to re-evaluate	IM Full renovation	PL Full renovation
<b>Facility Status</b>	O, PL, IM, GD, CH open as-is	O/GD closed - renovation. PL, IM, CH open as-is	O/GD, PL, IM open; CH - TBD	O/GD, PL, IM open; CH - TBD	O/GD, PL, open; CH - TBD	O/GD open; IM-TBD*; CH - TBD

\*Indian Mound to be 18 or 9 holes to be determined.  
Key: CH = clubhouse; O = Oleander; IM = Indian Mound; PL = Pine Lakes; GD = Great Dunes

## Financial Overview Summary

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- JIGC can improve its financial condition by opening a new Oleander/Great Dunes golf course
- NGF projects total facility revenue to exceed \$3.4 million in the first full year after re-opening the new Oleander/Great Dunes course
- The expense required to maintain “premium” conditions will continue to increase and keep the facility operating at (or near) a deficit
- Enhancing the quality of the golf product will drastically improve golf revenue, opening the door for even more revenue enhancement after Phase 3 improvements are completed and a new clubhouse begins to generate new revenue for the Authority

## Summary Conclusion

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- This facility is aging and had seen declines in activity for several years before recovery in 2021-2022
- Aging infrastructure and declining property conditions must be addressed if this is to remain a viable golf facility operation
- Projects will need to be completed over time (perhaps as long as 6+ years) in five (5) separate phases with a “strategic pause” after each phase to re-evaluate property conditions, market environment and community golfing needs
- The full allotment of 63 golf holes is likely not appropriate for JIGC

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