

NGCOA Canada's Quarterly Pulse Surveys, presented by Deluxe Payroll, provides operational benchmarking data to assist you in developing strategies for your operation. Surveys are released in February, May, and August annually and focus on one aspect of a golf operation.

The National Golf Course Owners Association (NGCOA) Canada member golf facilities were sent an email explaining the purpose of the survey and the benefit to participating. Representatives were asked to complete the short online survey with the results being published in the Golf Business Canada magazine as well as on the NGCOA Canada website. The survey was executed in both English and French.

Results

Our February 2022 survey focused on **Membership & Green/Guest Fee Rates** and results were separated to show the differences based on type of facility and membership type.

Memberships | By Type of Club

Regardless of type of club, from Private to Semi-Private to Daily Fee/Resort, the membership category breakdown is ²/₃ adult male.

Membership Categories			
	Private Clubs	Semi-Private	Daily Fee/Resort
Adult Male	67%	66%	65%
Adult Female	23%	24%	25%
Junior Male	8%	8%	8%
Junior Female	2%	2%	2%
Adult Twilight Only	0%	0%	0%
Total	100%	100%	100%

Currently 68% of Private Clubs across Canada are indicating that they have a waiting list for golf memberships for the upcoming season. Whereas 35% of Semi-Private facilities and 18% of Daily Fee/Resorts are now showing that they have a waiting list for the 2022 season.

Has A Waiting List For Membership			
	Private Clubs	Semi-Private	Daily Fee/Resort
Yes	68%	35%	18%
No	32%	65%	69%
N/A	0%	0%	13%
Total	100%	100%	100%

As anticipated 100% of Private Clubs offer an unlimited play membership. The majority of Semi-Private facilities (95%) offer unlimited play memberships while over ¾ of Daily Fee courses do as well.

Offers An Unlimited Play Membership			
	Private Clubs	Semi-Private	Daily Fee/Resort
Yes	100%	95%	78%
No	0%	5%	14%
N/A	0%	0%	8%
Total	100%	100%	100%

Green / Guest Fee Rates – By Type of Membership

More than ½ of the Private Clubs surveyed confirmed their prime guest rates are in excess of \$100. However, ⅔ of these same Private Clubs are offering junior guest rates for under \$60 and just under ½ have a twilight guest rate under \$60.

18-Hole Green/Guest Fee – Private Clubs				
	Prime	Junior	Senior	Twilight
< \$60	0%	67%	0%	46%
\$60 - \$79	17%	22%	12%	27%
\$80 - \$99	28%	0%	25%	0%
\$100 - \$120	33%	0%	44%	18%
> \$120	22%	11%	19%	9%
Total	100%	100%	100%	100%

More than ½ of the Semi-Private Clubs surveyed confirmed their prime guest rates are between \$40 & \$79. However, almost ⅔ of these same Semi-Privates are offering junior guest rates for under \$40 and close to ½ offer a senior guest rate between \$40 & \$59.

18-Hole Green/Guest Fee – Semi-Private				
	Prime	Junior	Senior	Twilight
< \$40	11%	62%	17%	49%
\$40 - \$59	37%	34%	45%	32%
\$60 - \$79	29%	2%	28%	17%
\$80 - \$99	16%	2%	6%	2%
> \$100	7%	0%	4%	0%
Total	100%	100%	100%	100%

60% of Daily Fee/Resort courses confirmed their prime guest rates are between \$40 & \$79. However, more than $\frac{2}{3}$ of these same Daily Fee/Resorts are offering junior guest rates for under \$40 and almost $\frac{1}{2}$ have a twilight guest rate under \$40.

18-Hole Green/Guest Fee – Daily Fee/Resort				
	Prime	Junior	Senior	Twilight
< \$40	14%	69%	28%	42%
\$40 - \$59	46%	20%	35%	31%
\$60 - \$79	14%	6%	17%	15%
\$80 - \$99	11%	5%	9%	10%
\$100 - \$120	4%	0%	5%	2%
> \$120	11%	0%	6%	0%
Total	100%	100%	100%	100%

Going into the 2022 golf season, facilities were asked whether they would allow for carryover into next year for multi-green fee packages. Of those who offer this option, $\frac{2}{3}$ of Private Clubs will not allow carryover into future years. Over $\frac{1}{2}$ of the Semi-Private clubs as well as the Daily Fee/Resort courses that offer package fees would allow carryover into future years.

Carry Over of 2022 Package Fees				
	Private Clubs	Semi-Private	Daily Fee/Resort	All Respondents
Yes	21%	47%	53%	47%
No	37%	37%	37%	37%
N/A	42%	16%	10%	16%
Total	100%	100%	100%	100%