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NGCOA Canada Quarterly Pulse Survey

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.

Results

*Our May 2022 survey focused on **Inflation** and results were separated to show the differences based on type of facility.*

Significance of Inflation On The 2022 Season

	PRIVATE CLUBS	SEMI-PRIVATE	DAILY FEE/RESORT	ALL RESPONDENTS
Not A Factor	0	3%	1%	2%
A Minor Challenge	62%	20%	30%	29%
A Fairly Significant Challenge	38%	74%	51%	59%
A Major Problem	0	3%	18%	10%
	100%	100%	100%	100%

More than half of survey respondents expect inflation to present a significant challenge in the 2022 season, notably, almost 3 out of 4 semi-private clubs.

Most Significant Operating Cost Impacted

	Private Clubs	Semi-Private Clubs	Daily Fee/Resort	All Respondents
Fuel & Energy	50%	56%	57%	56%
Wages		19%	11%	13%
Food Inputs	31%	9%	16%	15%
Course Maintenance Inputs		5%	10%	7%
Insurance		2%		1%
Capital Items	19%	9%	6%	8%
	100%	100%	100%	100%

Fuel and energy costs are by far the most significant cost item across all clubs, followed at quite a distance by Food Inputs and then Wages.

Mitigation Strategies For Input Cost Increases				
	Private Clubs	**Semi-Private Clubs**	**Daily Fee/Resort**	**All Respondents**
Offset w/cost reductions	38%	20%	24%	24%
Increase a few key prices	38%	43%	43%	42%
Increase most or all prices	24%	37%	33%	34%
	100%	100%	100%	100%

About 1/4 of respondents intend to absorb input cost increases and attempt to offset them by reducing expenses in other areas. About 1/3 intend to increase most or all prices across the board in line with input cost increases. The largest group, about 40%, will pass on inflationary input costs but by raising only a few key prices rather than across the board increases.

Evidence Of Reduced Customer Spending				
	Private Clubs	**Semi-Private**	**Daily Fee/Resort**	**All Respondents**
Not a factor to date	75%	37%	46%	45%
Some evidence of this	6%	7%	8%	8%
Fairly prevalent	19%	56%	46%	47%
	100%	100%	100%	100%

75% of private clubs did not see evidence of customers spending less while 47% of semi-private and daily fee/resort courses are reporting this to be fairly prevalent.