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NGCOA Canada Quarterly Pulse Survey

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> Payroll + Time and Attendance

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 entire National Golf Course Owners Association (NGCOA) Canada member golf facilities were sent an email explaining the purpose of the survey and the benefit of sharing their data. 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 August 2021 survey focused on **Tee Times** and results were separated to show the differences based on type of club.*

Survey Respondents					
Type of Club		Geographic Location		Number of Holes	
Private	14	British Columbia	30	9 holes	26
Semi-Private	62	The West	40	18 holes	115
Daily Fee	78	Ontario	69	27 holes	11
Resort	7	Quebec	10	36 holes	6
All	161	Atlantic	12	> 36 holes	3

Tee Time Interval & Daily Start Times

10 minutes is the most popular tee time interval, in use by 48% of all respondents, with 9 minutes the next most common – at 25%. Less than 10% of clubs employ an interval longer than 10 minutes.

Predominant Tee Time Interval				
Type of Club	Private Clubs	Semi-Private	Daily Fee/Resort	All Respondents
Less than 8 Minutes	0%	3%	1%	2%
8 Minutes	29%	19%	16%	19%
9 Minutes	29%	23%	26%	25%
10 Minutes	36%	51%	50%	48%
11 Minutes	6%	0%	0%	1%
12 Minutes or more	0%	4%	7%	5%
Total	100%	100%	100%	100%

30% of clubs begin their normal weekdays with a tee time at 6:30 a.m. or earlier, with slightly more (34%) getting the early start on weekends.

First Tee Time Weekdays				
Type of Club	Private Clubs	Semi-Private	Daily Fee/Resort	All Respondents
6:30 a.m. or earlier	14%	31%	33%	30%
6:31 – 7:00 a.m.	21%	23%	24%	23%
7:01 – 7:30 a.m.	65%	37%	29%	36%
After 7:30 a.m.	0%	9%	14%	11%
Total	100%	100%	100%	100%

First Tee Time | Weekends

Type of Club	Private Clubs	Semi-Private	Daily Fee/Resort	All Respondents
6:30 a.m. or earlier	29%	34%	37%	34%
6:31 – 7:00 a.m.	50%	29%	26%	30%
7:01 – 7:30 a.m.	21%	29%	22%	25%
After 7:30 a.m.	0%	8%	15%	11%
Total	100%	100%	100%	100%

Vacancy Rate at Peak Occupancy

49% of all respondents were 100% booked on their busiest Saturday morning this past July – no open spots were reported nor no-shows registered. A further 36% had openings amounting to less than 5%. This is indicative of continuing high demand for golf during the pandemic – cumulatively, 85% of clubs in the survey had more than 95% of available times utilized – for a “vacancy rate” during peak occupancy of less than 5%.

Vacancy Rate | Peak Occupancy July

% Spots Not Utilized	Private Clubs	Semi-Private	Daily Fee/Resort	All Respondents
0% - Fully Booked	57%	42%	52%	49%
Less than 5%	36%	50%	25%	36%
5% - 9%	7%	3%	10%	7%
10% - 14%	0%	2%	7%	4%
15% or More	0%	3%	6%	4%
Total	100%	100%	100%	100%

Advance Booking Windows

Almost half of the respondents allow their members to book tee times more than 7 days in advance (48%) and about one third (32%), extend the same window of more than 7 days to Green Fee players. In addition, 52% of respondents - mainly Semi-private and Daily Fee clubs - allow groups to pre-book the same tee-time each week for the season.

Advance Booking Window | Members

Type of Club	Private Clubs	Semi-Private	Daily Fee/Resort	All Respondents
4 Days or Less	21%	8%	11%	1%
5 days	0%	6%	1%	3%
6 days	0%	5%	1%	2%
7 days	43%	23%	28%	27%
More than 7 days	36%	58%	42%	48%
N/A - No Members	0%	0%	17%	9%
Total	100%	100%	100%	100%

Advance Booking Window | Green Fee Players

Type of Club	Private Clubs	Semi-Private	Daily Fee/Resort	All Respondents
4 Days or Less	0%	18%	11%	12%
5 days	0%	10%	8%	8%
6 days	0%	0%	2%	1%
7 days	0%	42%	41%	38%
More than 7 days	0%	30%	38%	32%
N/A Members Only	100%	0%	0%	9%
Total	100%	100%	100%	100%

Third Party Sales & No Shows

Almost one-third of public clubs sell discounted tee times through third parties (31%) and a little less than a quarter (24%) regularly charge for “No Shows”.

Tee Time Policies & Practices								
Frequency	Private Clubs		Semi-Private		Daily Fee/Resort		All Respondents	
	Yes	No	Yes	No	Yes	No	Yes	No
Sell via 3 rd parties	N/A	N/A	34%	66%	28%	72%	31%*	69%*
Allow Perpetual Pre-book	7%	93%	50%	50%	60%	40%	52%	48%
Charge for No Show	14%	86%	29%	71%	21%	79%	24%	76%

* (Private Excluded)