

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.

Method

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.

Presentation of the Results

Our February 2021 survey focused on **Course Maintenance Costs and Practices** and results were separated to show the differences based on type of club, number of holes, and property size.

Survey Respondents							
Type of Club		Number of Holes		Property Size		Superintendent on Staff	
Private	12	9 hole courses	18	< 70 acres	15	Yes	No
Semi-Private	47	18 hole courses	86	70-140 acres	36	112	10
Resort/Daily Fee	63	27 hole courses	10	140-200 acres	43		
		36 hole courses	5	200-320 acres	16		
		>36 holes	3	>320 acres	12		

Course Maintenance Costs | By Type of Club

Not surprisingly, the vast majority of Private clubs surveyed spend almost twice as much on maintenance as do their semi-private or daily fee counterparts. Over 80% of private clubs in the survey report labour budgets in excess of \$600K annually, with 75% spending more than \$400K on non-labour inputs.

In contrast, over 70% of semi-private & daily fee operations spend less than \$400K on labour, while 90% of semi-privates and 68% of daily fee clubs budget less than \$250K for non-labour inputs.

2021 Budget - Course Maintenance Labour Costs

Budget Amount	Private Clubs	Semi-Private	Daily Fee/Resort	All Respondents
Less than \$250K	0%	51%	46%	44%
Between \$250-400K	8%	23%	27%	24%
Between \$400-600K	8%	21%	11%	16%
Between \$600-800K	58%	2%	6%	9%
More than \$800K	25%	0%	6%	7%
Not Answered	0%	2%	3%	1%
Total	101%	99%	99%	101%

2021 Budget - Course Maintenance - All Non-Labour Costs

Budget Amount	Private Clubs	Semi-Private	Daily Fee/Resort	All Respondents
Less than \$150K	0%	42%	49%	42%
Between \$150-250K	8%	49%	19%	29%
Between \$250-400K	17%	4%	21%	14%
Between \$400-600K	33%	2%	5%	7%
More than \$600K	42%	2%	5%	7%
Not Answered	0%	0%	1%	1%
Total	100%	99%	100%	100%

Course Maintenance Practices | By Type of Club

In terms of cutting frequencies, 92% of private clubs surveyed cut greens everyday (*and we suspect the few that don't use "roll only" once a week*), compared to 77% of semi-private and daily fee clubs.

Peak Season Normal Cutting - Greens				
Frequency	Private Clubs	Semi-Private	Daily Fee/Resort	All Respondents
Every day	92%	77%	78%	78%
Every Other day	0%	6%	11%	8%
2 Times Per Week	0%	2%	0%	1%
3 Times Per Week	0%	2%	3%	3%
4-6 Times Per Week	8%	13%	8%	10%
Total	100%	100%	100%	100%

For tees the most common frequency is 3 times per week, with “every other day” the next most popular schedule.

Peak Season Normal Cutting - Tees				
Frequency	Private Clubs	Semi-Private	Daily Fee/Resort	All Respondents
Every day	25%	6%	6%	9%
Every Other day	17%	19%	35%	27%
2 Times Per Week	0%	21%	21%	19%
3 Times Per Week	33%	47%	36%	39%
4-6 Times Per Week	25%	6%	2%	6%
Total	100%	99%	100%	100%

25% of private clubs cut all fairways daily, while 75% of semi-private and daily fee/resort do this either 2 or 3 times per week.

Peak Season Normal Cutting - Fairways

Frequency	Private Clubs	Semi-Private	Daily Fee/Resort	All Respondents
Every day	25%	0%	5%	5%
Every Other day	17%	20%	25%	22%
2 Times Per Week	0%	40%	27%	30%
3 Times Per Week	33%	34%	38%	36%
4-6 Times Per Week	25%	6%	5%	7%
Total	100%	100%	100%	100%

For roughs, most clubs only complete a cut twice each week – 76% of all respondents are in this category.

Peak Season Normal Cutting – Roughs Complete Course

Frequency	Private Clubs	Semi-Private	Daily Fee/Resort	All Respondents
Every day	0%	0%	0%	0%
Every Other day	8%	10%	9%	10%
2 Times Per Week	59%	79%	78%	76%
3 Times Per Week	25%	11%	11%	12%
4-6 Times Per Week	8%	0%	2%	2%
Total	100%	100%	100%	100%

Irrigation - MAIN Source of Water

Criteria	Private Clubs	Semi-Private	Daily Fee/Resort	All Respondents
On-Course Wells	50%	30%	17%	26%
Municipal Water Supply	0%	15%	10%	11%
Body of Water	50%	50%	62%	56%
Rain Water Collection	0%	5%	11%	7%
Total	100%	100%	100%	100%

82% of clubs surveyed reported using wells or a body of water for their main irrigation water source. 11% are using municipal supply, and only 7% rely mainly on rain water collection.

Course Maintenance Costs | By Number of Holes

Incremental costs are quite linear as # of holes and property size increases. Where 93-94% of 9 hole courses operate with a combined maintenance budget under \$400K, only 39% of 18 hole courses do the same, about 20% of 27 hole courses, and no courses of 36 holes or more are maintained for those dollar amounts. About half of all 27-hole courses have a total maintenance budget of between \$400K and \$650K. For labour costs only, 15% of clubs exceed a budget of \$600K, and the majority of those maintain 36 holes or more.

2021 Budget - Course Maintenance Labour Costs

Budget Amount	9-hole	18-hole	27-hole	36-holes or >	All Respondents
Less than \$250K	94%	39%	30%	0%	43%
Between \$250-400K	6%	25%	50%	25%	25%
Between \$400-600K	0%	17%	20%	25%	16%
Between \$600-800K	0%	10%	0%	25%	9%
More than \$800K	0%	6%	0%	25%	6%
Not Answered	0%	2%	0%	0%	1%
Total	100%	99%	100%	100%	100%

2021 Budget - Course Maintenance - All Non-Labour Costs

Budget Amount	9-hole	18-hole	27-hole	36-holes or >	All Respondents
Less than \$250K	94%	38%	20%	0%	41%
Between \$250-400K	6%	32%	40%	38%	30%
Between \$400-600K	0%	17%	10%	25%	15%
Between \$600-800K	0%	4%	30%	0%	6%
More than \$800K	0%	7%	0%	37%	7%
Not Answered	0%	1%	0%	0%	1%
Total	100%	99%	100%	100%	100%

Course Maintenance Costs | By Property Size

2021 Budget - Course Maintenance Labour Costs

Budget Amount	<70 acres	70-140 acres	140-200 acres	200-320 acres	>320 acres
Less than \$250K	93%	58%	30%	19%	9%
Between \$250-400K	7%	22%	23%	44%	36%
Between \$400-600K	0%	14%	19%	25%	18%
Between \$600-800K	0%	3%	16%	6%	18%
More than \$800K	0%	3%	7%	6%	18%
Not Answered	0%	0%	5%	0%	0%
Total	100%	100%	100%	100%	99%

2021 Budget - Course Maintenance - All Non-Labour Costs

Budget Amount	<70 acres	70-140 acres	140-200 acres	200-320 acres	>320 acres
Less than \$250K	93%	53%	30%	19%	9%
Between \$250-400K	7%	33%	33%	31%	37%
Between \$400-600K	0%	3%	23%	31%	18%
Between \$600-800K	0%	6%	7%	6%	9%
More than \$800K	0%	5%	5%	13%	27%
Not Answered	0%	0%	2%	0%	0%
Total	100%	100%	100%	100%	100%