

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 May 2021 survey focused on **Power Carts** and results were separated to show the differences based on type of club.

Survey Respondents							
Type of Club		Number of Holes		Fleet Size   # of Clubs		Allow Member-owned Carts?	
Private	23	9 hole courses	19	Less than 24	9	Yes	No
Semi-Private	57	18 hole courses	131	24-36 carts	19	53	120
Resort/Daily Fee	93	27 hole courses	13	37-60 carts	65		
		36 hole courses	8	61-72 carts	39		
		>36 holes	2	More than 72 carts	41		

## Fleet Size and Usage | By Type of Club

The largest power cart fleets tend to be at Daily Fee and Semi-Private clubs with almost half of those respondents maintaining fleets of 60 carts or more. That is in line with usage as both types of clubs report cart usage for 2/3 of rounds played. This compares to Private clubs where more than 3/4 of clubs report fleets of 60 carts or less, and just over 1/3 of rounds played with cart.

### Power Cart Fleet Size

	Private Clubs	Semi-Private	Daily Fee/Resort	All Respondents
Less than 24 Carts	0%	4%	7%	5%
Between 24-36	0%	7%	16%	11%
Between 37-60	77%	44%	25%	37%
Between 61-72	18%	24%	22%	23%
More than 72 carts	5%	21%	30%	24%
Total	100%	100%	100	100%

### Power Cart Usage

% of Players Riding	Private Clubs	Semi-Private	Daily Fee/Resort	All Respondents
0% (Carts not available)	0%	0%	0%	0%
Less than 30%	18%	9%	10%	11%
Between 30-49%	46%	24%	24%	27%
Between 50-74%	36%	39%	29%	33%
Between 75-99%	0%	28%	35%	28%
100% (Mandatory Carts)	0%	0%	2%	1%
Total	100%	100%	100%	100%

## Ownership and Power | By Type of Club

Private clubs responding heavily favoured leasing their fleet (68%), with 85% choosing electric carts while Semi-Private & Daily Fee clubs just as strongly tended to own their carts (62% & 69% respectively) with more than 2/3 being gas-powered.

Ownership of Power Cart Fleet				
	Private Clubs	Semi-Private	Daily Fee/Resort	All Respondents
100% Owned	28%	55%	63%	56%
Mainly Owned	4%	7%	6%	6%
Mainly Leased	4%	12%	9%	9%
100% Leased	64%	26%	22%	29%
All	100%	100%	100%	100%

Gas vs. Electric				
	Private Clubs	Semi-Private	Daily Fee/Resort	All Respondents
% Gas-powered	15%	79%	67%	64%
% Electric power	85%	21%	33%	36%
Total	100%	100%	100%	100%

## Rates, Season Passes, Member-Owned Carts | By Type of Club

More than 3/4 of private clubs charge individual rental rates above \$20 while 72% of Semi-Private and 59% of Daily Fee clubs charge less than \$20, with \$16-19 the most popular range.

<b>Rental Rate 18 Holes/Rider</b>				
	<b>Private Clubs</b>	<b>Semi-Private</b>	<b>Daily Fee/Resort</b>	<b>All Respondents</b>
Less than \$12	0%	2%	4%	3%
\$12-\$15	0%	7%	14%	10%
\$16-\$19	23%	63%	41%	46%
\$20-23	68%	23%	34%	35%
More than \$23	9%	5%	7%	6%
Total	100%	100%	100%	100%

Both Semi- and Private membership clubs routinely offer season cart passes while 40% of Daily Fee clubs do not. Typical season passes cost more than \$599. About 1/3 of Semi-Private clubs and 1/4 of Daily Fee operations price passes between \$400 and \$599.

<b>Season Pass – Unlimited Rides</b>				
	<b>Private Clubs</b>	<b>Semi-Private</b>	<b>Daily Fee/Resort</b>	<b>All Respondents</b>
Not Offered	17%	5%	40%	26%
< \$300	0%	2%	2%	1%
\$300-\$399	0%	5%	5%	5%
\$400-\$499	0%	18%	10%	10%
\$500-\$599	4%	16%	15%	14%
> \$599	79%	54%	28%	44%
Total	100%	100%	100%	100%

Semi-private clubs were most accommodating of member-owned carts with 44% allowing them compared to just 29% of Daily Fee and a mere 4% of Private clubs. Of the Semi-Privates allowing member owned carts, 30% collect a trail fee of at least \$499 annually, while 40% charge \$300 to \$499 per year.

<b>Trail Pass for Member-Owned Cart</b>				
	<b>Private Clubs</b>	<b>Semi-Private</b>	<b>Daily Fee/Resort</b>	<b>All Respondents</b>
Not Offered	96%	56%	71%	70%
Less than \$200	0	9%	10%	8%
\$200-\$299	0	4%	6%	4%
\$300-\$399	0	9%	7%	6%
\$400-\$499	4%	9%	2%	5%
More than \$499	0	13%	4%	7%
<b>Total</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>