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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.

Results

Our August 2023 survey focused on a variety of topics including the **biggest challenges of 2023, peak vacancy, F&B service, and more.** Results were separated to show the differences based on type of facility.

Biggest Challenges of the 2023 Season

	Private Clubs	Semi-Private/Public Clubs	All Respondents
Staffing	50%	37%	39%
Adverse Weather	33%	31%	31%
None or No Answer	17%	12%	13%
Supply Issues	0%	10%	9%
Regulatory Changes	0%	6%	6%
Competition	0%	3%	2%
	100%	100%	100%

Respondents indicated that difficulty hiring enough seasonal staff was the number one challenge in 2023, followed quite closely by adverse weather conditions. Supply issues, regulatory changes, and local competition paled in comparison to these 2 major factors.

Food & Beverage Service

	Private Clubs	Semi-Private & Public Clubs	All Respondents
The Same as Pre-Covid	67%	57%	58%
Expanded Compared to Pre-Covid	25%	24%	24%
Reduced Compared to Pre-Covid	8%	19%	18%
	100%	100%	100%

Food & beverage service at more than 80% of all respondents is now the same or expanded compared to pre-covid times. 18% of respondents say they have reduced food & beverage service.

Peak Season Vacancy

	Private Clubs	Semi-Private & Public	All Respondents
0% - Fully Booked	42%	36%	36%
Less than 5% Vacant	25%	36%	35%
5 – 9% Vacant	0%	11%	11%
10-14% Vacant	17%	12%	13%
15 – 20% Vacant	8%	4%	4%
More than 20% Vacant	8%	1%	1%
	100%	100%	100%

In 2023, 67% of private clubs and 72% of semi-private & public clubs reported less than 5% vacancy on their busiest July Saturday morning. The comparable result of this question in July 2021 was 83% and 90% respectively. There has been some softening of demand for prime tee times.

Revenue Sources

	Private Clubs	Semi-Private & Public	All Respondents
Member Dues & Green Fees	63%	50%	51%
Cart Rentals	6%	12%	12%
Pro Shop Sales	8%	8%	8%
Beer & Liquor Sales	7%	11%	11%
Food Sales	9%	11%	11%
Simulator/Range Fees	2%	4%	3%
Other Revenues	5%	4%	4%
	100%	100%	100%

Semi-private & public clubs depend somewhat more on cart rentals and food & beverage sales (34%) compared to private clubs (22%). The latter derive almost two-thirds of their revenue from member dues and guest fees, vs. one-half at semi-private and public clubs.

Time Par

	Private Clubs	Semi-Private & Public Clubs	All Respondents
Less Than 4 hours	33%	10%	12%
4:00 – 4:15	59%	59%	59%
4:16 – 4:30	8%	28%	27%
4:31 – 4:46	0%	3%	2%
More Than 4:46	0%	0%	0%
All	100%	100%	100%

While more than 90% of private clubs aim for rounds of 4 hours 15 minutes or less, a time par between 4 hours and 4 hours 15 minutes is the most common standard, used at 59% of all courses, regardless of type. Between 4 hours 16 minutes and 4 hours 30 minutes is the next most frequently quoted time par.

Tee Time Intervals

	Private Clubs	Semi-Private & Public Clubs	All Respondents
Only 1 Interval Used	50%	79%	76%
> 1 Interval Used Daily	50%	11%	16%
Different Interval on Weekends	0%	10%	8%
	100%	100%	100%

Three quarters of courses use one common tee time interval throughout their weekly tee sheets. The remainder either vary the interval within certain days or use different intervals for weekends and weekdays.