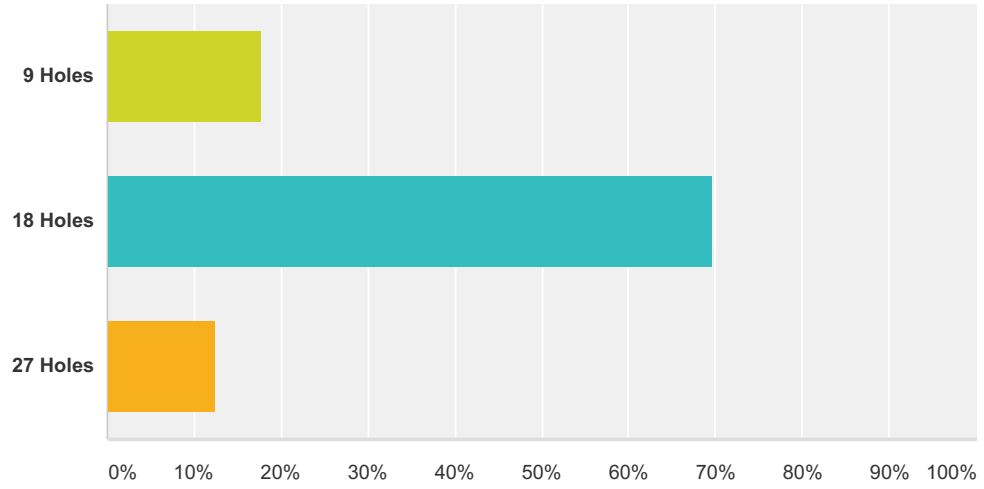


**Q1 What are the first three digits in your postal code?**

Answered: 318 Skipped: 7

**Q2 Number of Holes (on one site). If you operate a golf course with 36 or more holes, please submit a separate survey for each 18 hole golf course.**

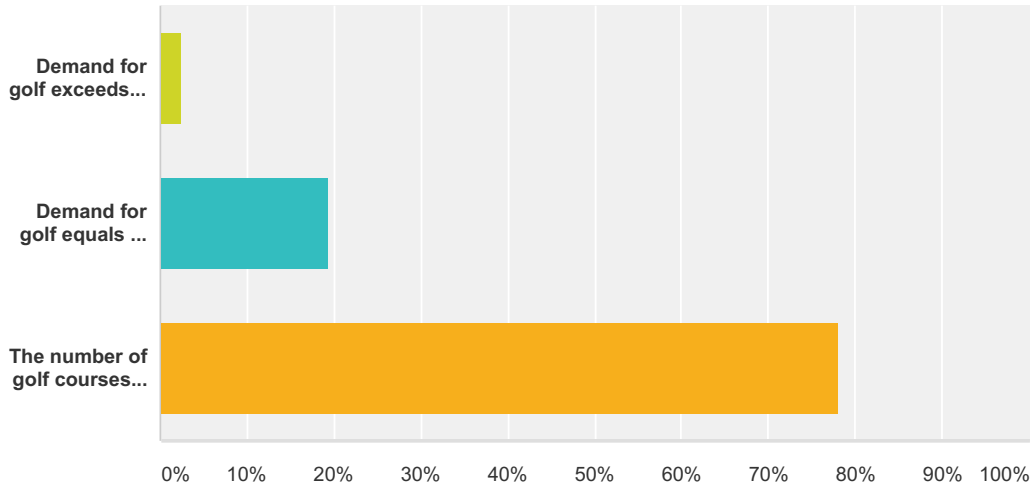
Answered: 320 Skipped: 5



Answer Choices	Responses
9 Holes	17.81% 57
18 Holes	69.69% 223
27 Holes	12.50% 40
<b>Total</b>	<b>320</b>

### Q3 With respect to supply and demand?

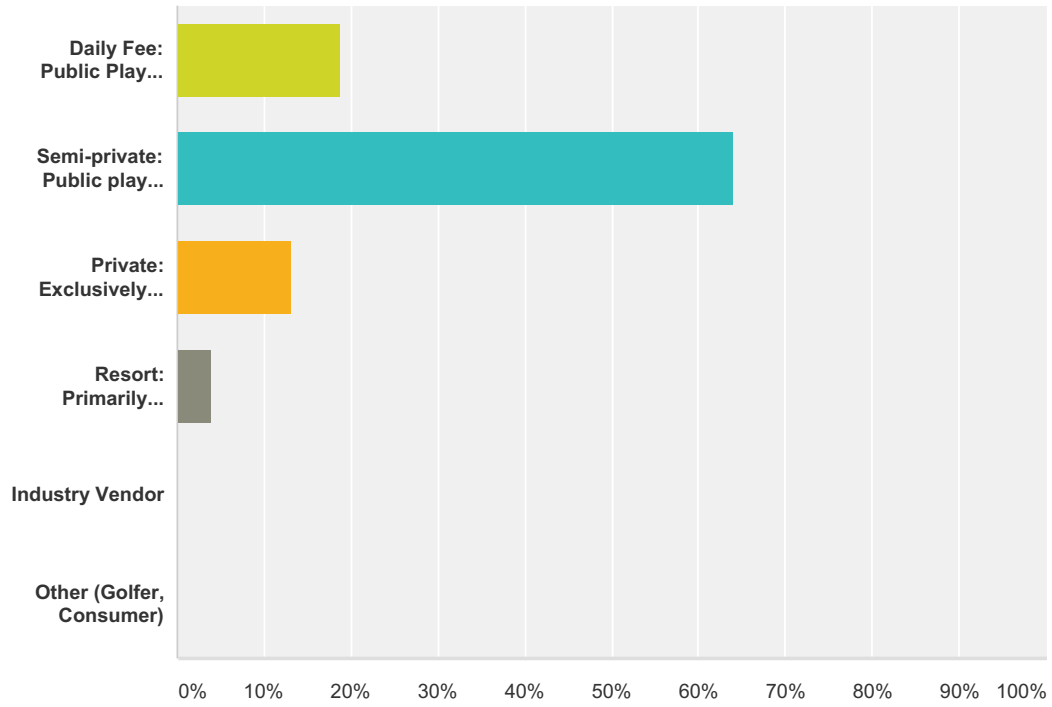
Answered: 318 Skipped: 7



Answer Choices	Responses
Demand for golf exceeds the number of courses in your market.	2.52% 8
Demand for golf equals the supply of courses in your market.	19.50% 62
The number of golf courses exceeds the demand for golf in your market.	77.99% 248
<b>Total</b>	<b>318</b>

### Q4 The type of facility you operate is?

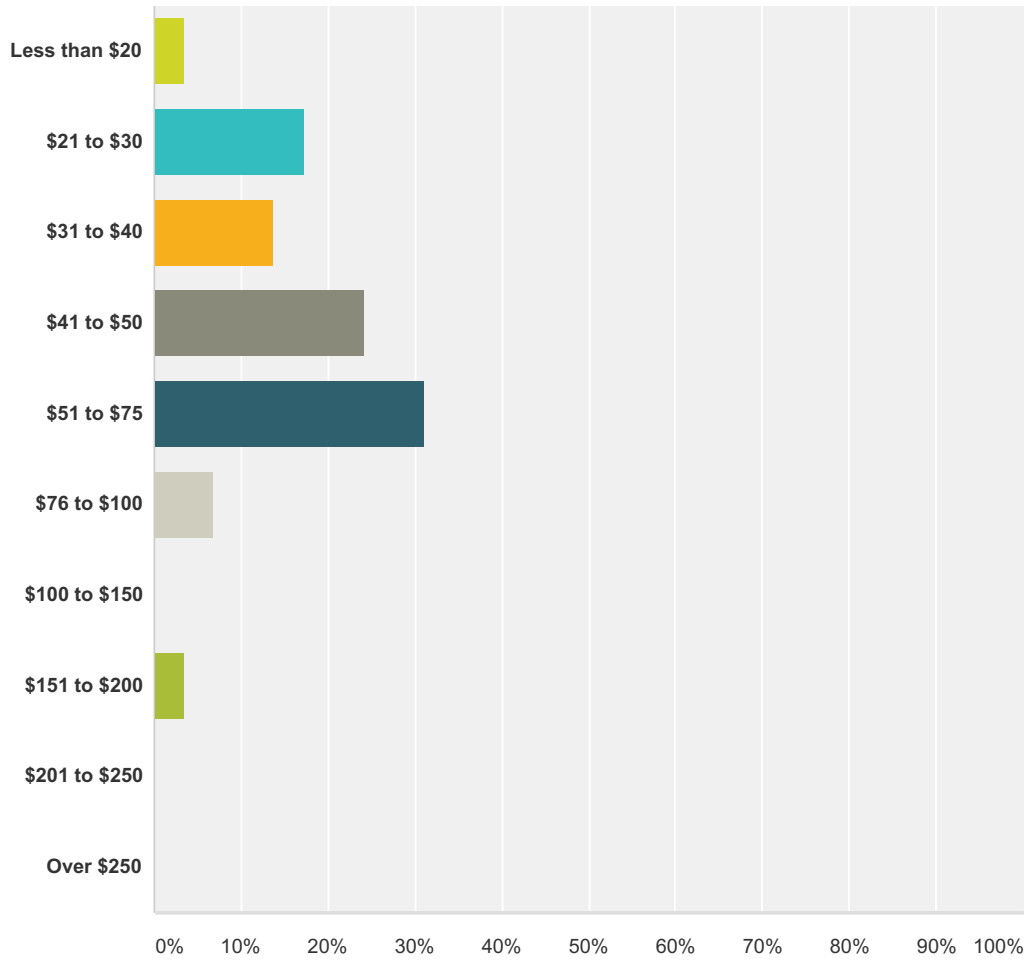
Answered: 321 Skipped: 4



Answer Choices	Responses
Daily Fee: Public Play Only	18.69% 60
Semi-private: Public play combined with some membership	64.17% 206
Private: Exclusively membership	13.08% 42
Resort: Primarily tourism play, accommodations available	4.05% 13
Industry Vendor	0.00% 0
Other (Golfer, Consumer)	0.00% 0
<b>Total</b>	<b>321</b>

### Q5 How much is your green fee for 18 holes during prime time?

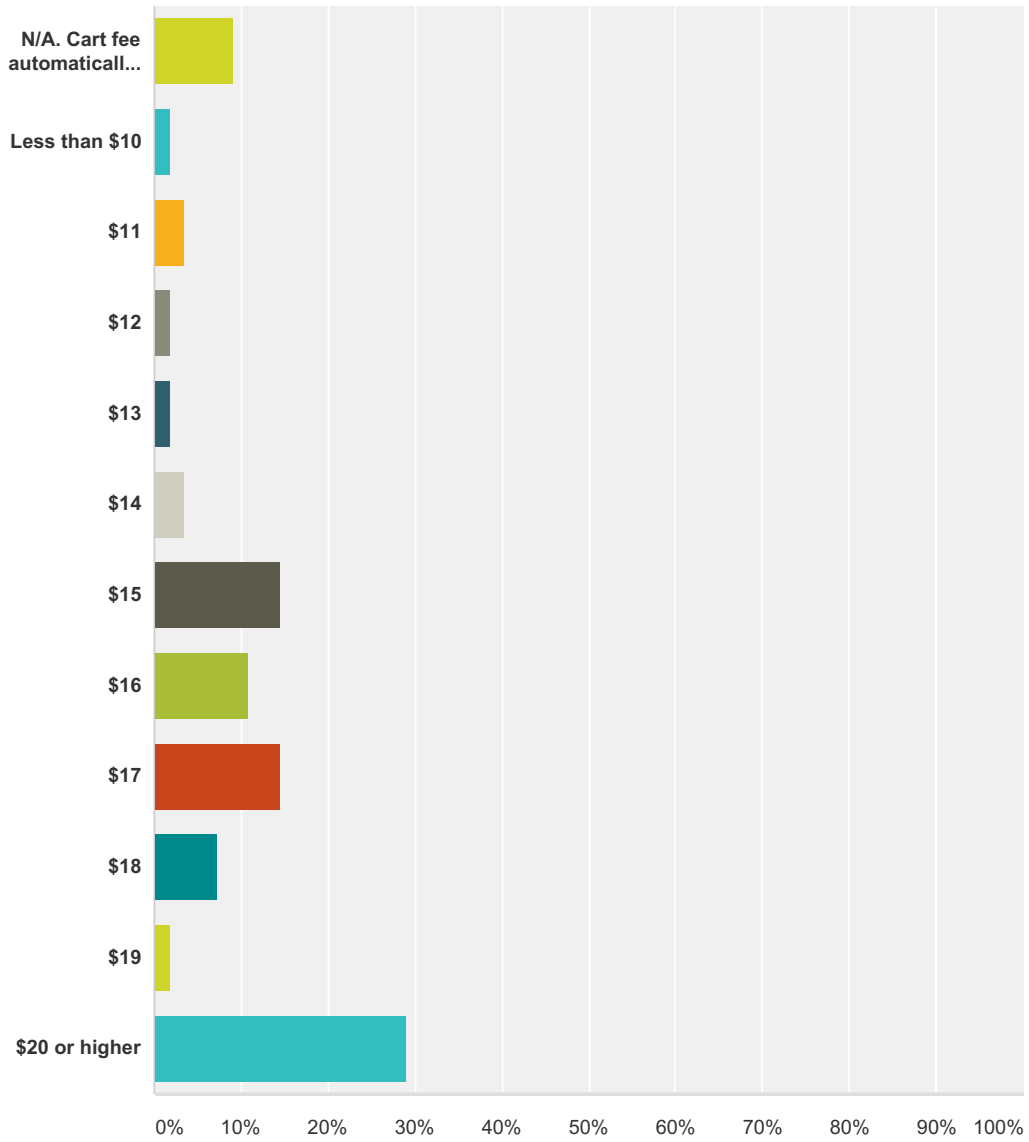
Answered: 58 Skipped: 267



Answer Choices	Responses
Less than \$20	3.45% 2
\$21 to \$30	17.24% 10
\$31 to \$40	13.79% 8
\$41 to \$50	24.14% 14
\$51 to \$75	31.03% 18
\$76 to \$100	6.90% 4
\$100 to \$150	0.00% 0
\$151 to \$200	3.45% 2
\$201 to \$250	0.00% 0
Over \$250	0.00% 0
<b>Total</b>	<b>58</b>

**Q6 How much is your cart rate for a single rider for 18 holes during prime time?**

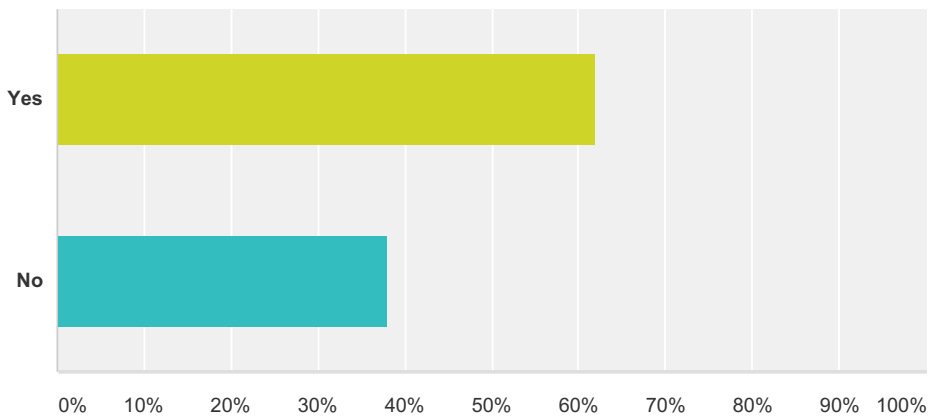
Answered: 55 Skipped: 270



Answer Choices	Responses
N/A. Cart fee automatically included in rate	9.09% 5
Less than \$10	1.82% 1
\$11	3.64% 2
\$12	1.82% 1
\$13	1.82% 1
\$14	3.64% 2
\$15	14.55% 8
\$16	10.91% 6
\$17	14.55% 8
\$18	7.27% 4
\$19	1.82% 1
\$20 or higher	29.09% 16
<b>Total</b>	<b>55</b>

**Q7 Do you measure the number of playable days in a year?**

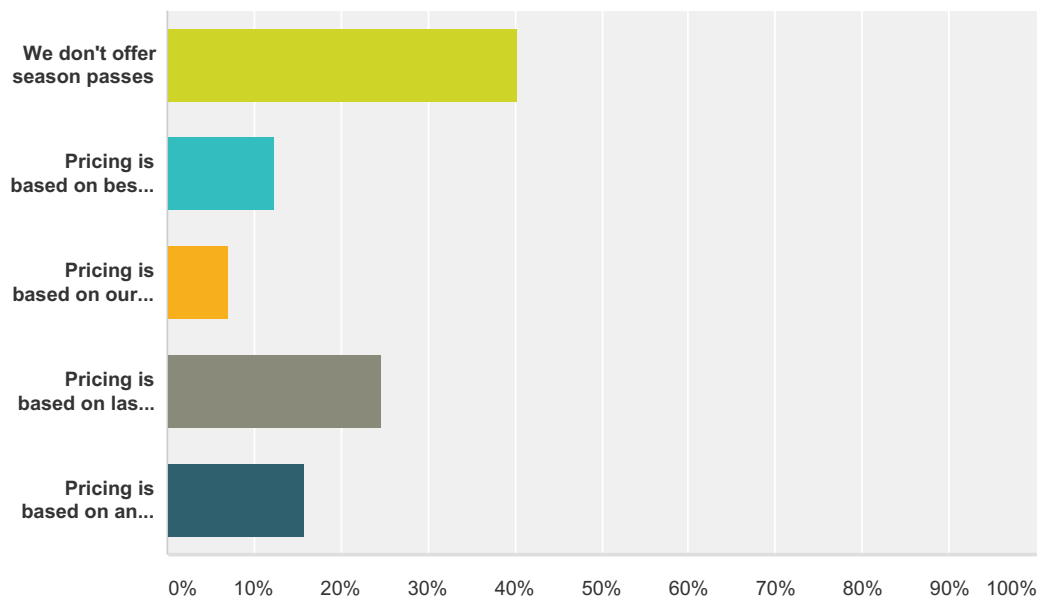
Answered: 58 Skipped: 267



Answer Choices	Responses	
Yes	62.07%	36
No	37.93%	22
<b>Total</b>		<b>58</b>

### Q8 Regarding season passes:

Answered: 57 Skipped: 268

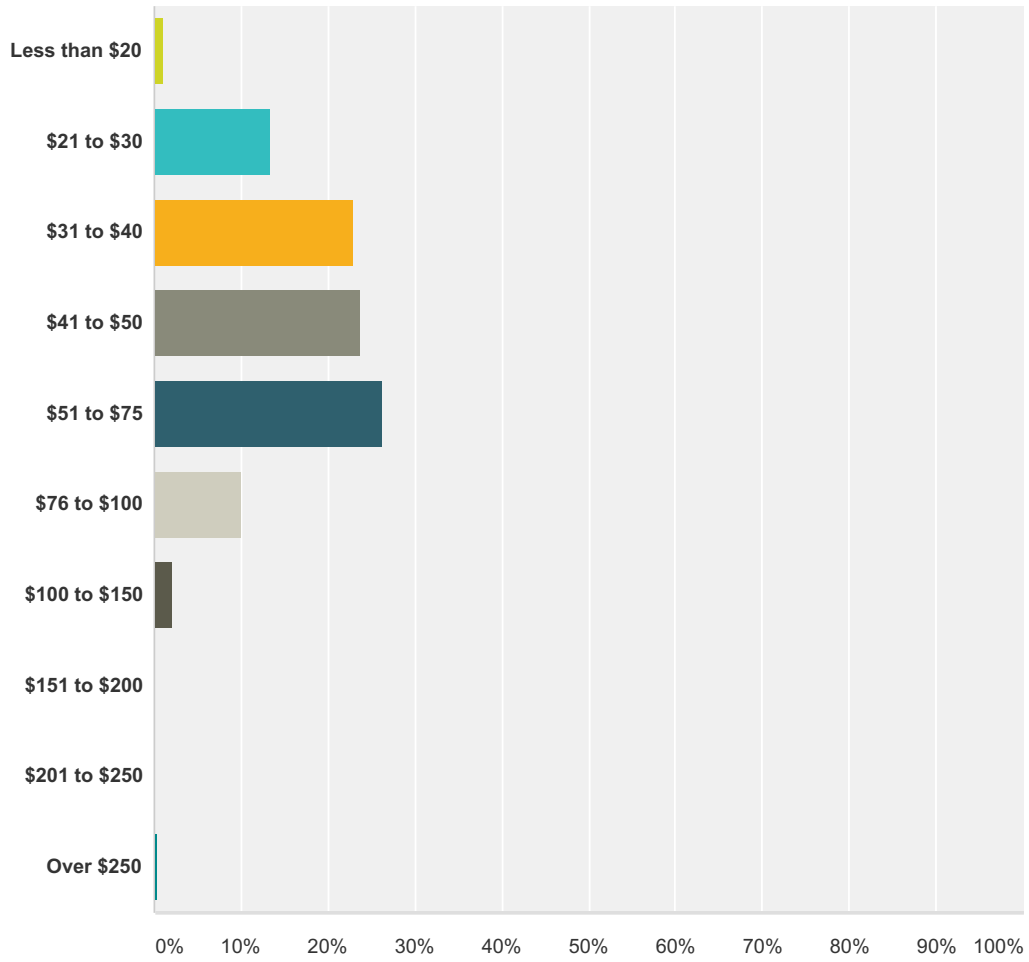


Answer Choices	Responses
We don't offer season passes	40.35% 23
Pricing is based on best estimate as to fair market value	12.28% 7
Pricing is based on our competitor's pricing	7.02% 4
Pricing is based on last year's rate, adjusted for inflation and market conditions	24.56% 14
Pricing is based on an appropriate discount for prepayment based upon estimate of the number of rounds a golfer will play	15.79% 9
<b>Total</b>	<b>57</b>



### Q9 How much is your green fee for 18 holes during prime time?

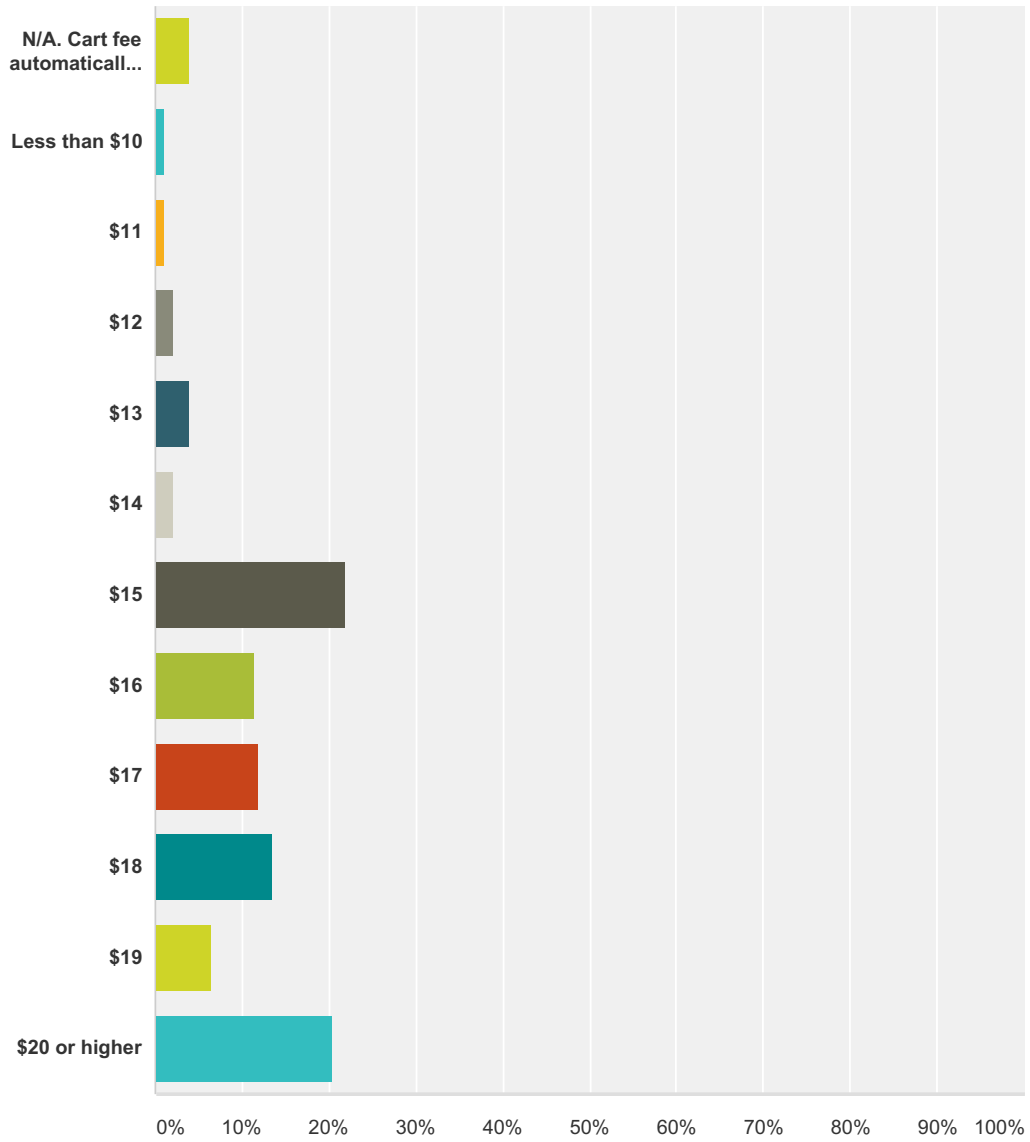
Answered: 201 Skipped: 124



Answer Choices	Responses
Less than \$20	1.00% 2
\$21 to \$30	13.43% 27
\$31 to \$40	22.89% 46
\$41 to \$50	23.88% 48
\$51 to \$75	26.37% 53
\$76 to \$100	9.95% 20
\$100 to \$150	1.99% 4
\$151 to \$200	0.00% 0
\$201 to \$250	0.00% 0
Over \$250	0.50% 1
<b>Total</b>	<b>201</b>

**Q10 How much is your cart rate for a single rider for 18 holes during prime time?**

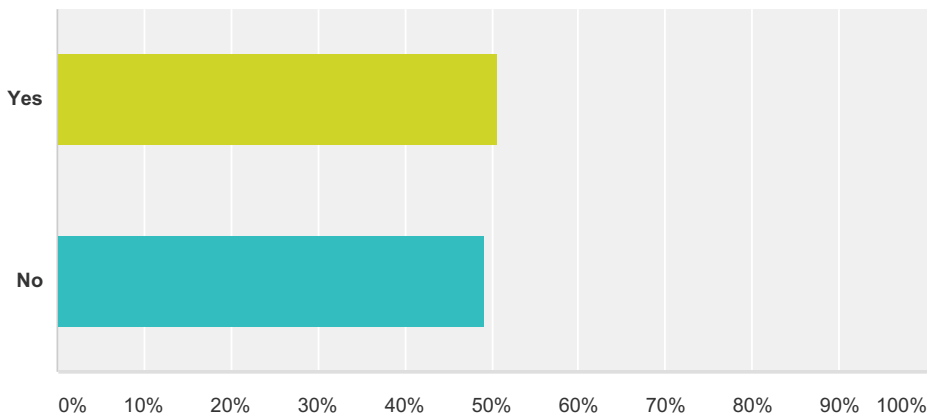
Answered: 200 Skipped: 125



Answer Choices	Responses
N/A. Cart fee automatically included in the rate.	4.00% 8
Less than \$10	1.00% 2
\$11	1.00% 2
\$12	2.00% 4
\$13	4.00% 8
\$14	2.00% 4
\$15	22.00% 44
\$16	11.50% 23
\$17	12.00% 24
\$18	13.50% 27
\$19	6.50% 13
\$20 or higher	20.50% 41
<b>Total</b>	<b>200</b>

### Q11 Do you measure the number of playable days in a year?

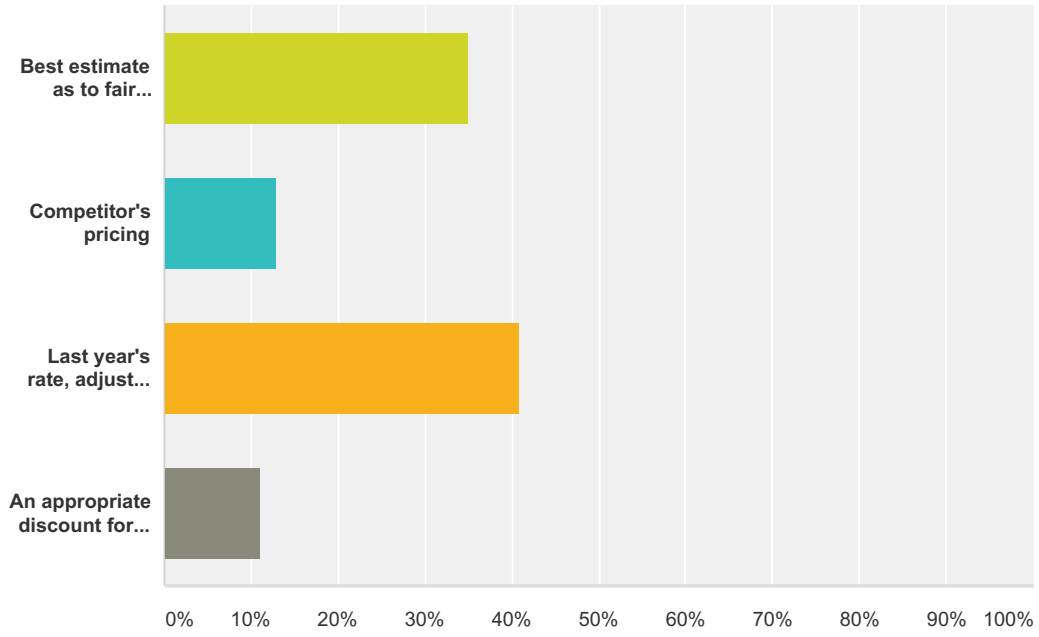
Answered: 199 Skipped: 126



Answer Choices	Responses
Yes	50.75% 101
No	49.25% 98
<b>Total</b>	<b>199</b>

**Q12 Your membership price is based on....**

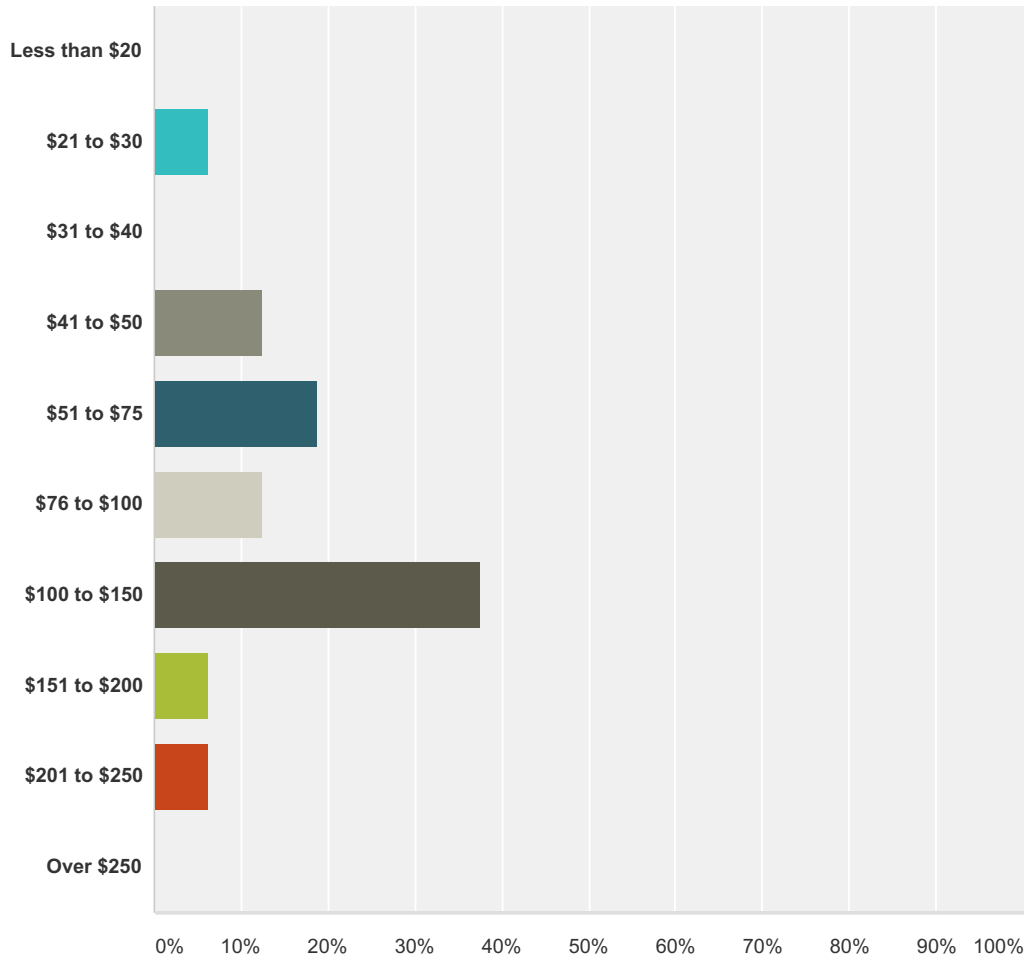
Answered: 200 Skipped: 125



Answer Choices	Responses
Best estimate as to fair market value	35.00% 70
Competitor's pricing	13.00% 26
Last year's rate, adjusted for inflation and market conditions	41.00% 82
An appropriate discount for prepayment based upon estimate of the number of rounds a golfer will play	11.00% 22
<b>Total</b>	<b>200</b>

### Q13 How much is your green fee for 18 holes during prime time?

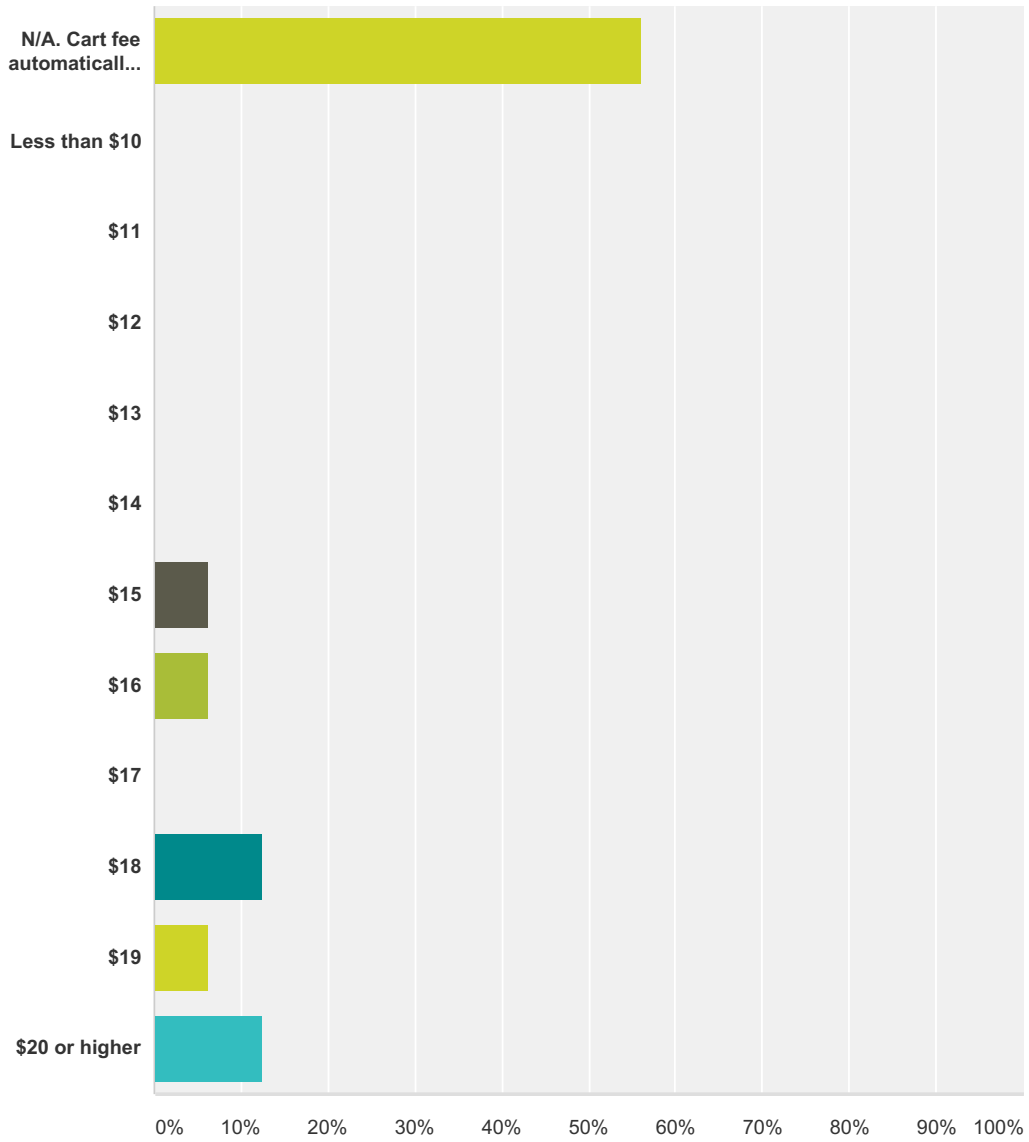
Answered: 16 Skipped: 309



Answer Choices	Responses
Less than \$20	0.00% 0
\$21 to \$30	6.25% 1
\$31 to \$40	0.00% 0
\$41 to \$50	12.50% 2
\$51 to \$75	18.75% 3
\$76 to \$100	12.50% 2
\$100 to \$150	37.50% 6
\$151 to \$200	6.25% 1
\$201 to \$250	6.25% 1
Over \$250	0.00% 0
<b>Total</b>	<b>16</b>

### Q14 How much is your cart rate for a single rider for 18 holes during prime time?

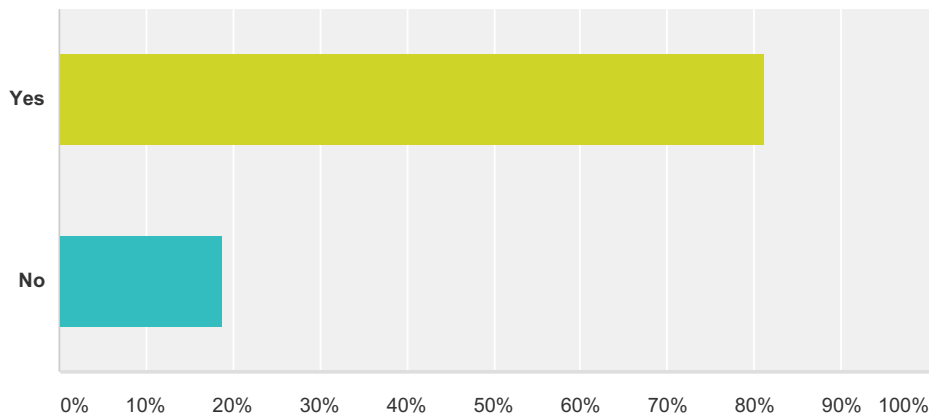
Answered: 16 Skipped: 309



Answer Choices	Responses
N/A. Cart fee automatically included in the rate	56.25% 9
Less than \$10	0.00% 0
\$11	0.00% 0
\$12	0.00% 0
\$13	0.00% 0
\$14	0.00% 0
\$15	6.25% 1
\$16	6.25% 1
\$17	0.00% 0
\$18	12.50% 2
\$19	6.25% 1
\$20 or higher	12.50% 2
<b>Total</b>	<b>16</b>

### Q15 Do you measure the number of playable days in a year?

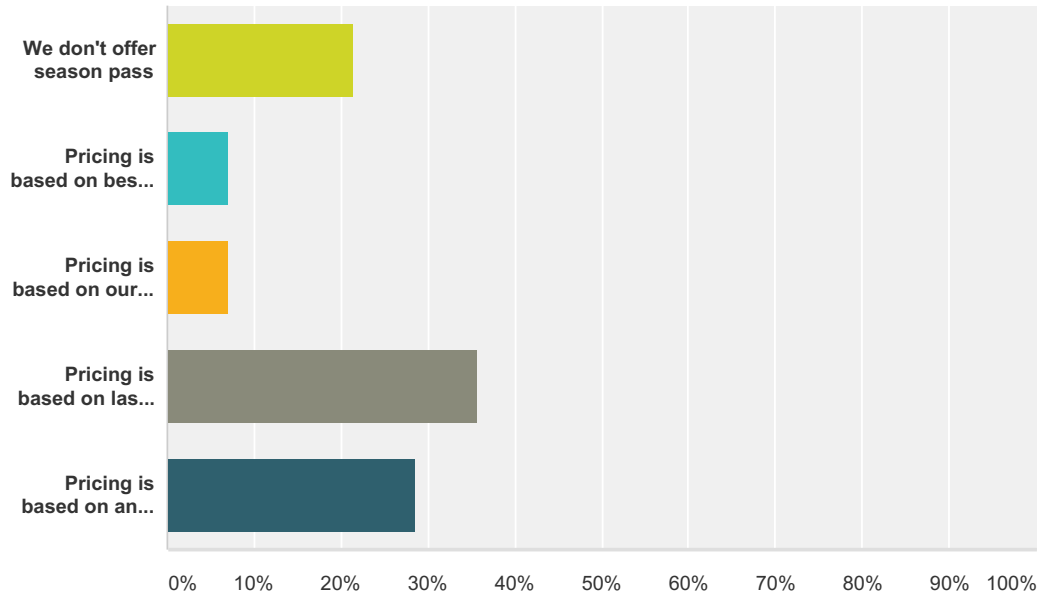
Answered: 16 Skipped: 309



Answer Choices	Responses	
Yes	81.25%	13
No	18.75%	3
<b>Total</b>		<b>16</b>

**Q16 Regarding season passes:**

Answered: 14 Skipped: 311

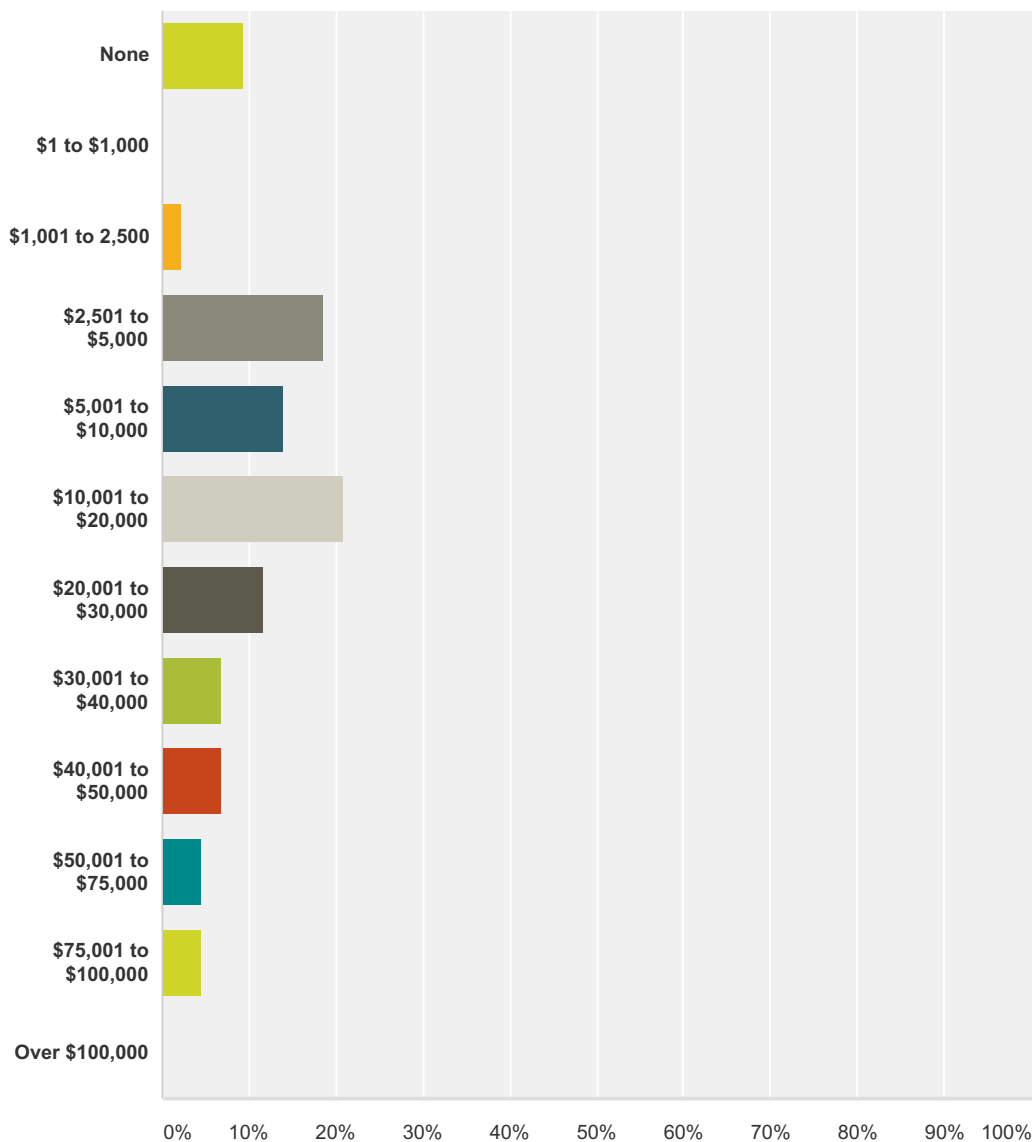


Answer Choices	Responses
We don't offer season pass	21.43% 3
Pricing is based on best estimate as to fair market value	7.14% 1
Pricing is based on our competitor's pricing	7.14% 1
Pricing is based on last year's rate, adjusted for inflation and market conditions	35.71% 5
Pricing is based on an appropriate discount for prepayment based upon estimate of the number of rounds a golfer will play	28.57% 4
<b>Total</b>	<b>14</b>



### Q17 What is Your Initiation Fee?

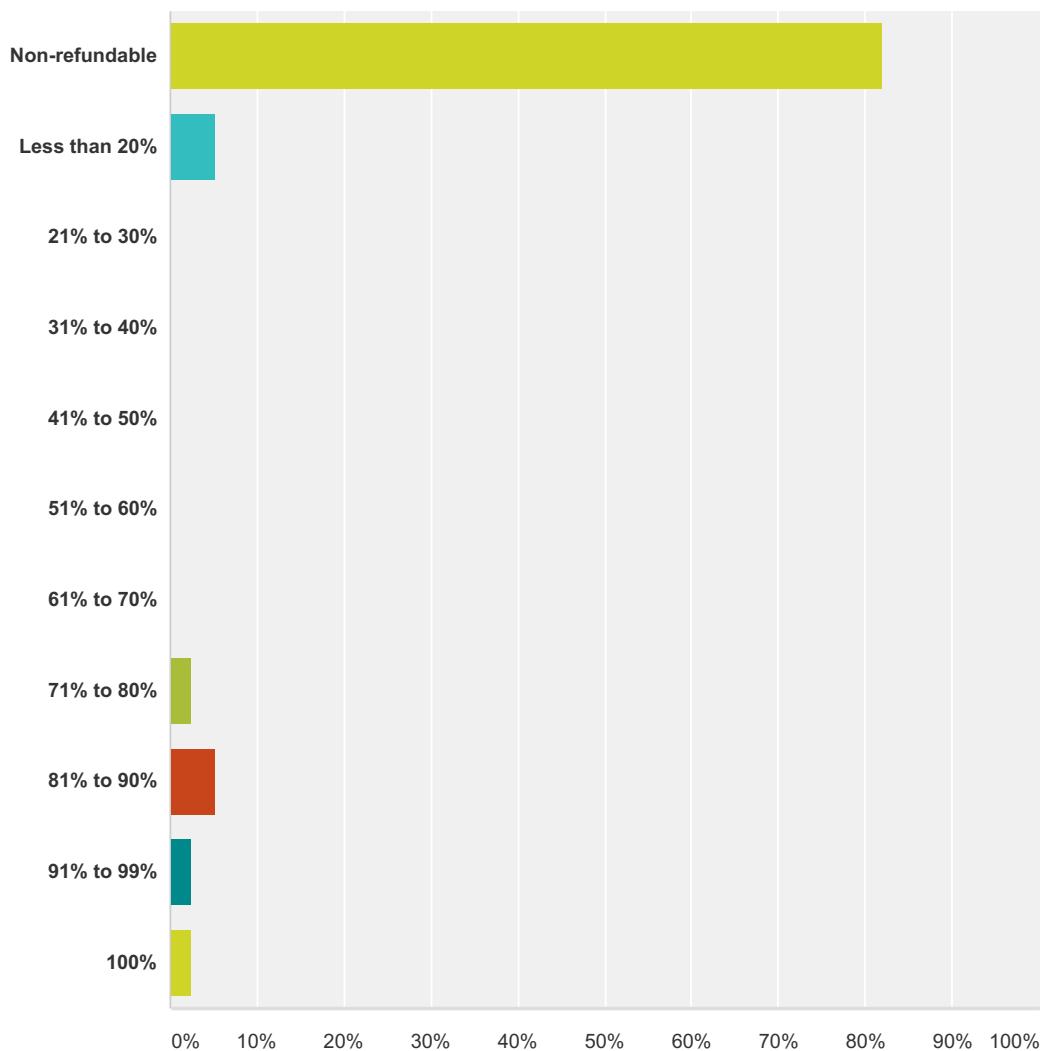
Answered: 43 Skipped: 282



Answer Choices	Responses
None	9.30% 4
\$1 to \$1,000	0.00% 0
\$1,001 to 2,500	2.33% 1
\$2,501 to \$5,000	18.60% 8
\$5,001 to \$10,000	13.95% 6
\$10,001 to \$20,000	20.93% 9
\$20,001 to \$30,000	11.63% 5
\$30,001 to \$40,000	6.98% 3
\$40,001 to \$50,000	6.98% 3
\$50,001 to \$75,000	4.65% 2
\$75,001 to \$100,000	4.65% 2
Over \$100,000	0.00% 0
<b>Total</b>	<b>43</b>

### Q18 What percent of the initiation fee is refundable?

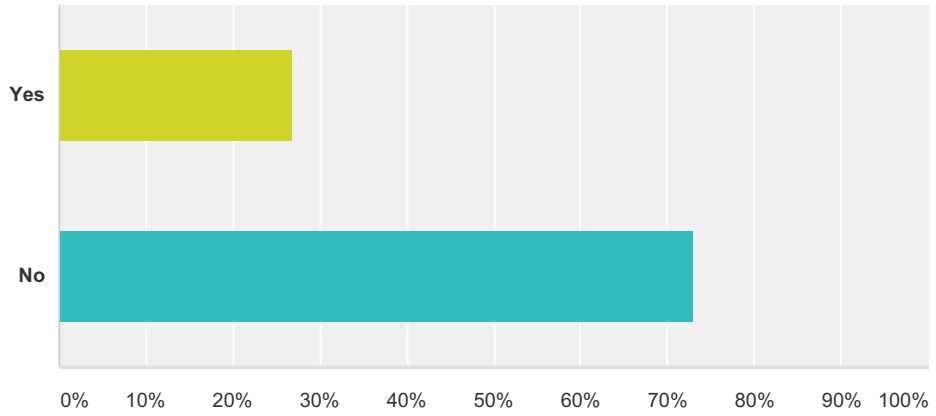
Answered: 39 Skipped: 286



Answer Choices	Responses	
Non-refundable	82.05%	32
Less than 20%	5.13%	2
21% to 30%	0.00%	0
31% to 40%	0.00%	0
41% to 50%	0.00%	0
51% to 60%	0.00%	0
61% to 70%	0.00%	0
71% to 80%	2.56%	1
81% to 90%	5.13%	2
91% to 99%	2.56%	1
100%	2.56%	1
<b>Total</b>		<b>39</b>

**Q19 Do you believe market based pricing, where a potential member bids to purchase a membership at the value they deem appropriate, is a viable operational concept?**

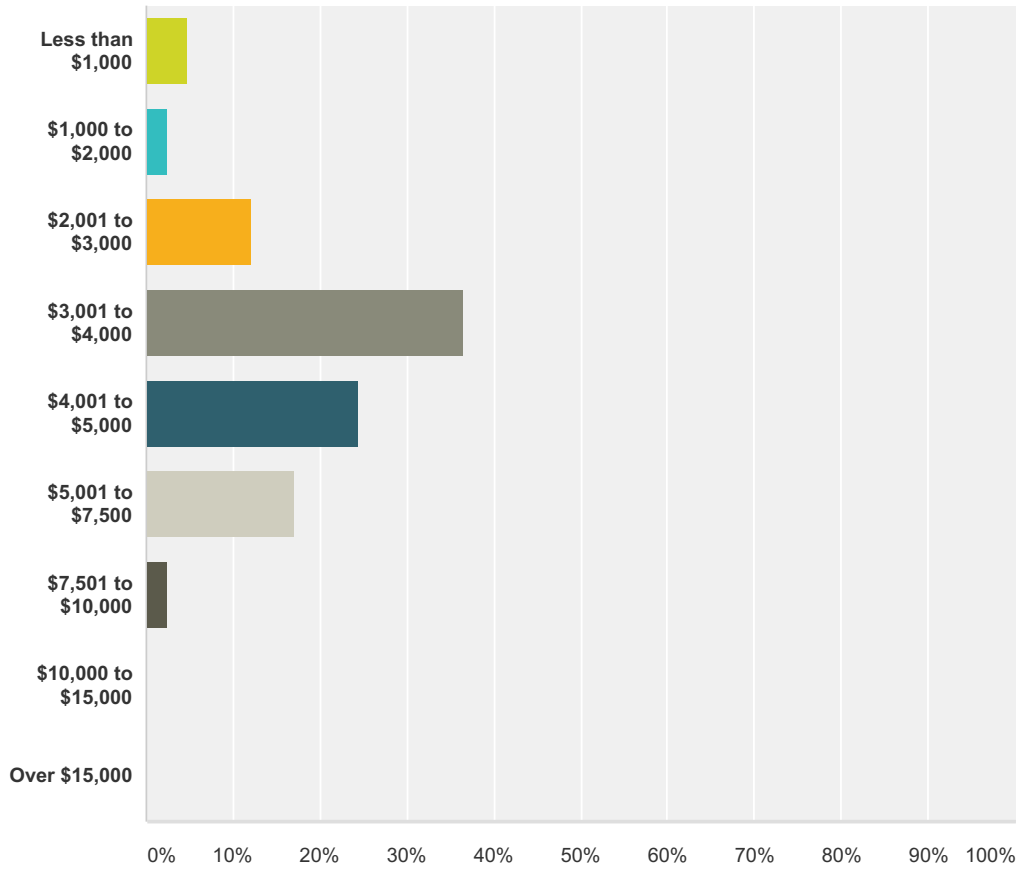
Answered: 41 Skipped: 284



Answer Choices	Responses
Yes	26.83% 11
No	73.17% 30
<b>Total</b>	<b>41</b>

### Q20 What are your current annual dues?

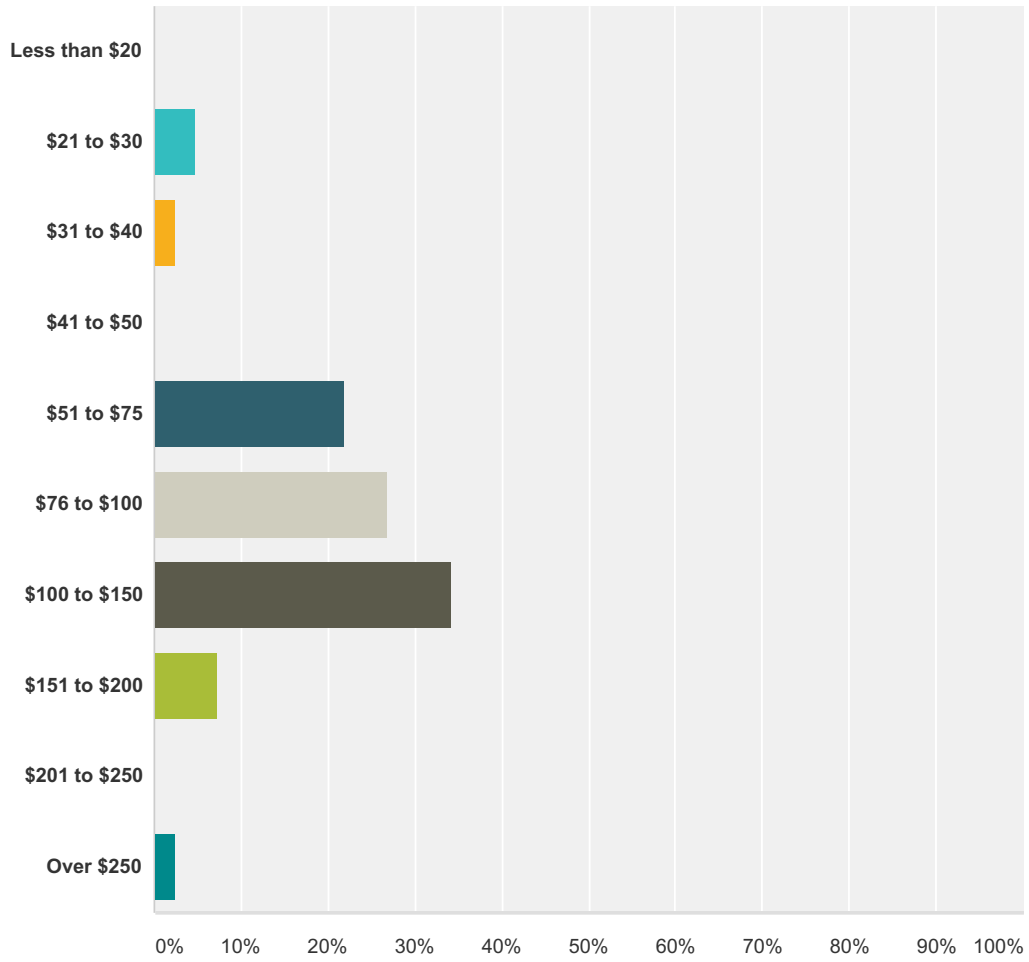
Answered: 41 Skipped: 284



Answer Choices	Responses
Less than \$1,000	4.88% 2
\$1,000 to \$2,000	2.44% 1
\$2,001 to \$3,000	12.20% 5
\$3,001 to \$4,000	36.59% 15
\$4,001 to \$5,000	24.39% 10
\$5,001 to \$7,500	17.07% 7
\$7,501 to \$10,000	2.44% 1
\$10,000 to \$15,000	0.00% 0
Over \$15,000	0.00% 0
<b>Total</b>	<b>41</b>

### Q21 How much is your guest green fee for 18 holes during prime time?

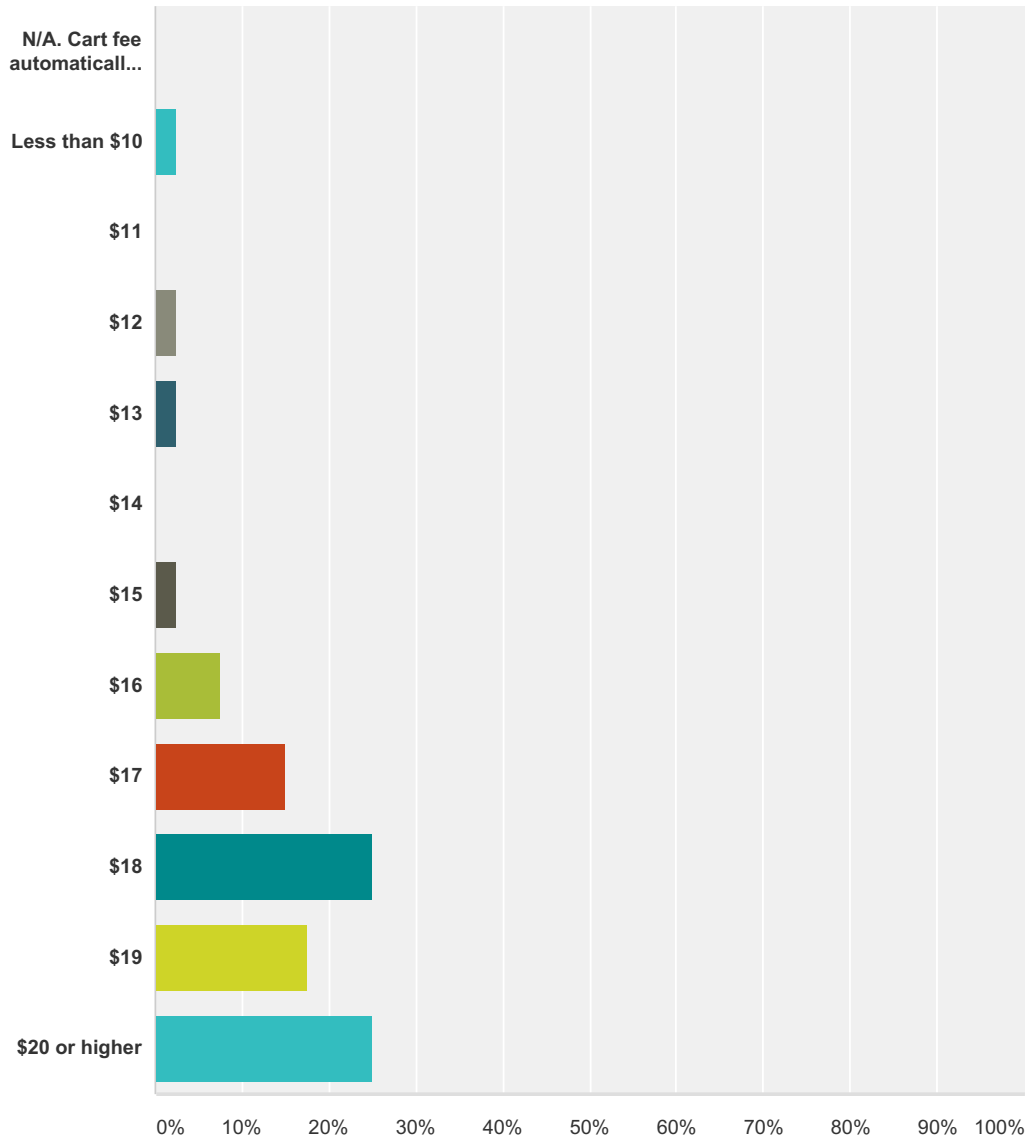
Answered: 41 Skipped: 284



Answer Choices	Responses
Less than \$20	0.00% 0
\$21 to \$30	4.88% 2
\$31 to \$40	2.44% 1
\$41 to \$50	0.00% 0
\$51 to \$75	21.95% 9
\$76 to \$100	26.83% 11
\$100 to \$150	34.15% 14
\$151 to \$200	7.32% 3
\$201 to \$250	0.00% 0
Over \$250	2.44% 1
<b>Total</b>	<b>41</b>

**Q22 How much is your cart rate for a single rider fee for 18 holes during prime time?**

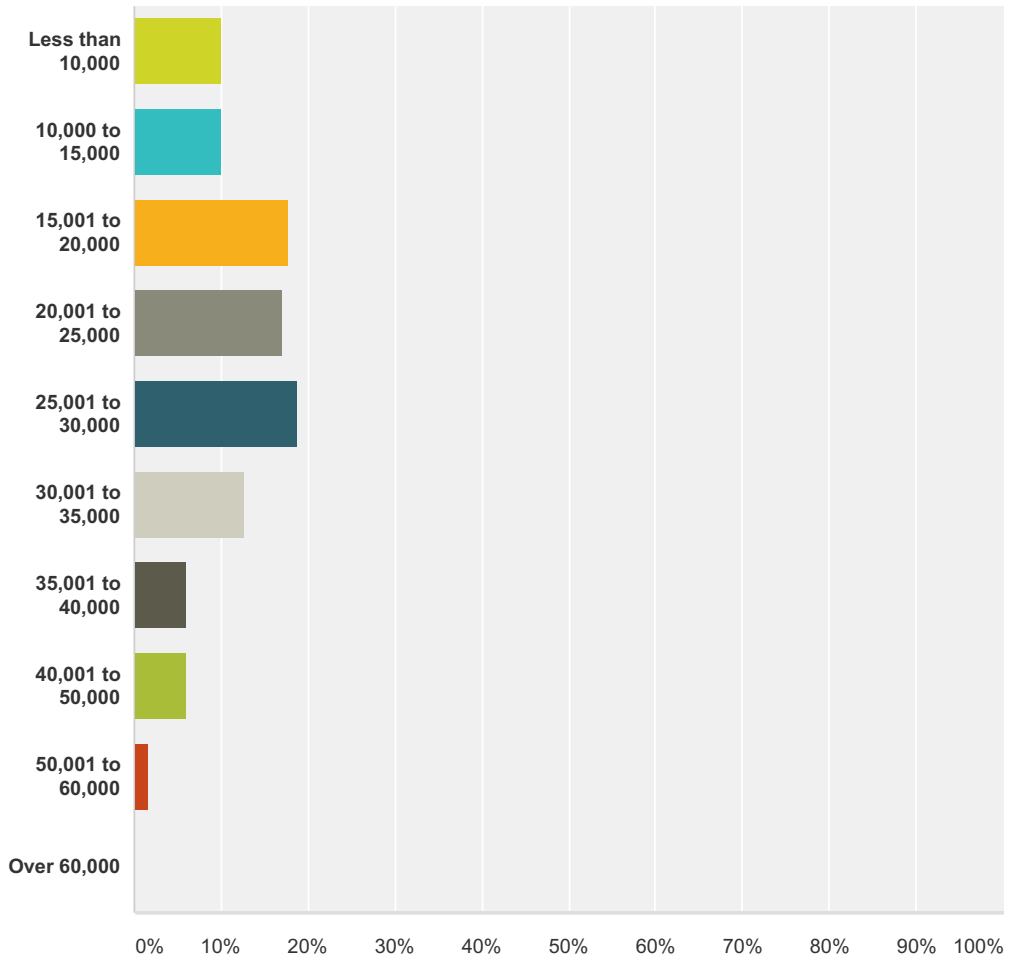
Answered: 40 Skipped: 285



Answer Choices	Responses
N/A. Cart fee automatically included in the rate	0.00% 0
Less than \$10	2.50% 1
\$11	0.00% 0
\$12	2.50% 1
\$13	2.50% 1
\$14	0.00% 0
\$15	2.50% 1
\$16	7.50% 3
\$17	15.00% 6
\$18	25.00% 10
\$19	17.50% 7
\$20 or higher	25.00% 10
<b>Total</b>	<b>40</b>

### Q23 How Many Rounds (starts) are Played at Your Course?

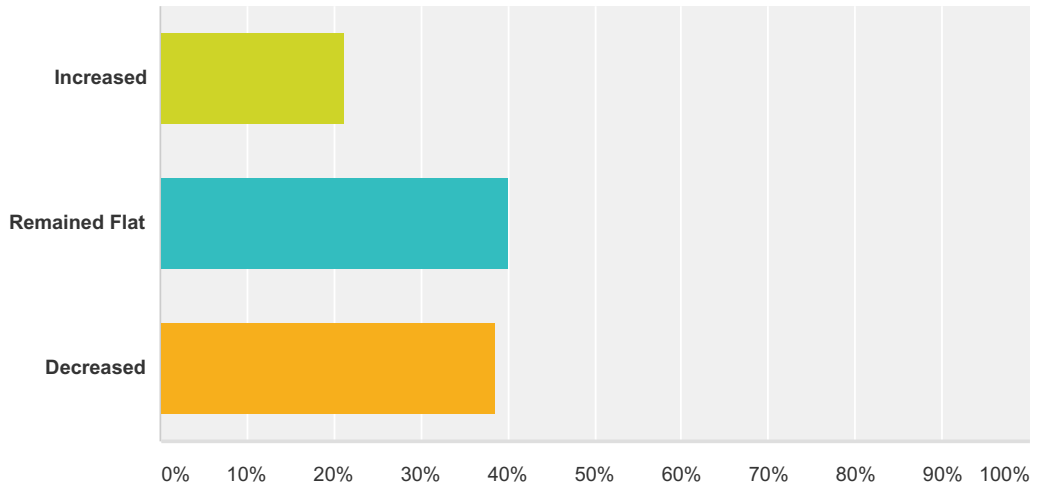
Answered: 282 Skipped: 43



Answer Choices	Responses	Count
Less than 10,000	9.93%	28
10,000 to 15,000	9.93%	28
15,001 to 20,000	17.73%	50
20,001 to 25,000	17.02%	48
25,001 to 30,000	18.79%	53
30,001 to 35,000	12.77%	36
35,001 to 40,000	6.03%	17
40,001 to 50,000	6.03%	17
50,001 to 60,000	1.77%	5
Over 60,000	0.00%	0
<b>Total</b>		<b>282</b>

**Q24 Over the past 5 years, have your total rounds (starts):**

Answered: 282 Skipped: 43

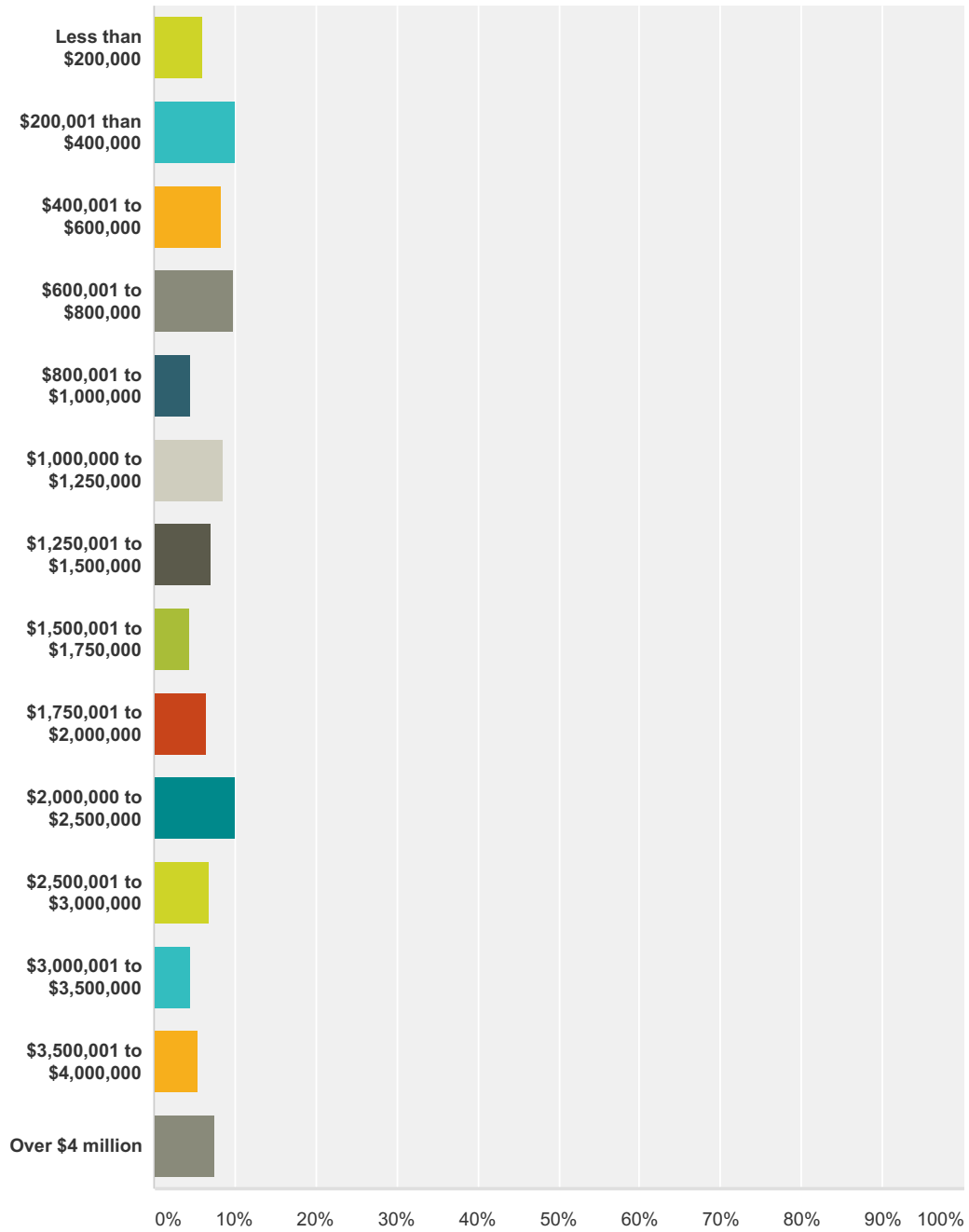


Answer Choices	Responses
Increased	21.28% 60
Remained Flat	40.07% 113
Decreased	38.65% 109
<b>Total</b>	<b>282</b>



### Q25 What is your facilities gross revenue from all sources, in 2012?

Answered: 278 Skipped: 47



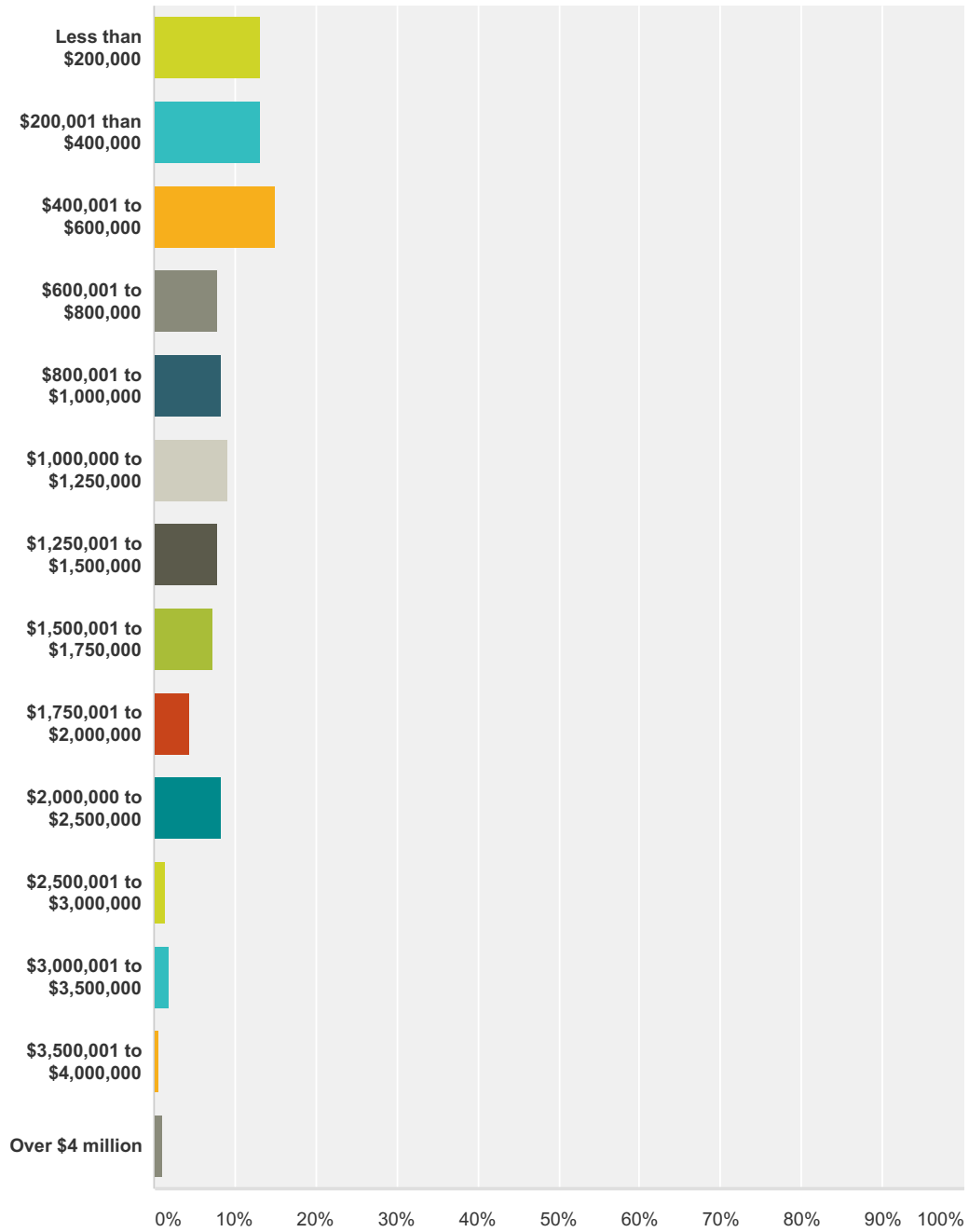
Answer Choices	Responses
Less than \$200,000	6.12% 17
\$200,001 to \$400,000	10.07% 28
\$400,001 to \$600,000	8.27% 23
\$600,001 to \$800,000	9.71% 27
\$800,001 to \$1,000,000	4.68% 13
\$1,000,001 to \$1,250,000	8.63% 24
\$1,250,001 to \$1,500,000	7.19% 20
\$1,500,001 to \$1,750,000	4.32% 12
\$1,750,001 to \$2,000,000	6.47% 18
\$2,000,001 to \$2,500,000	10.07% 28
\$2,500,001 to \$3,000,000	6.83% 19
\$3,000,001 to \$3,500,000	4.68% 13
\$3,500,001 to \$4,000,000	5.40% 15

NGCOA - Canada: Golf Course Benchmarking Survey

Over \$4 million	7.55%	21
<b>Total</b>		<b>278</b>

**Q26 What was your total golf revenue in green fees/membership, carts, in 2012?**

Answered: 274 Skipped: 51



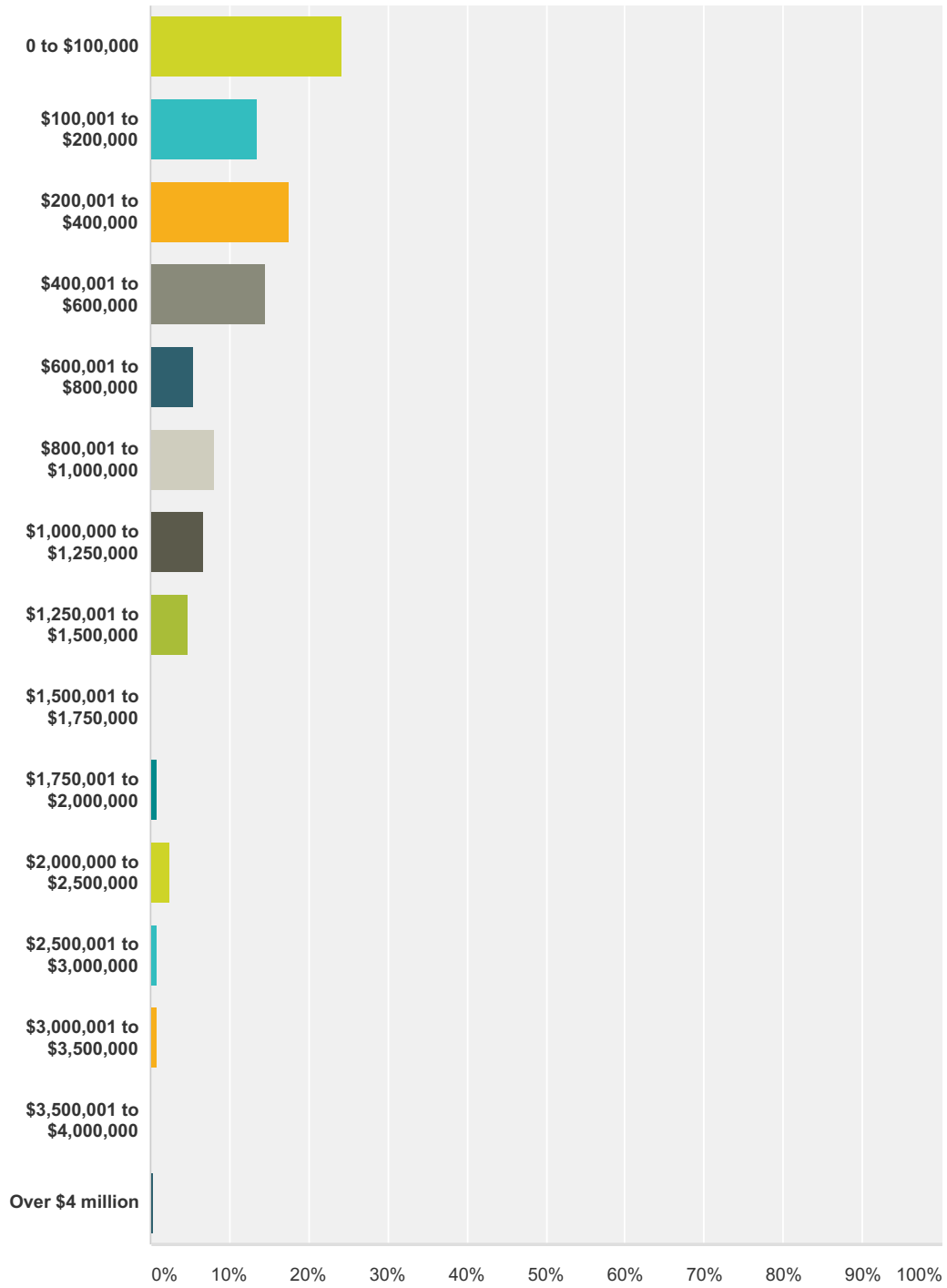
Answer Choices	Responses
Less than \$200,000	13.14% 36
\$200,001 to \$400,000	13.14% 36
\$400,001 to \$600,000	14.96% 41
\$600,001 to \$800,000	8.03% 22
\$800,001 to \$1,000,000	8.39% 23
\$1,000,000 to \$1,250,000	9.12% 25
\$1,250,001 to \$1,500,000	8.03% 22
\$1,500,001 to \$1,750,000	7.30% 20
\$1,750,001 to \$2,000,000	4.38% 12
\$2,000,000 to \$2,500,000	8.39% 23
\$2,500,001 to \$3,000,000	1.46% 4
\$3,000,001 to \$3,500,000	1.82% 5
\$3,500,001 to \$4,000,000	0.73% 2

## NGCOA - Canada: Golf Course Benchmarking Survey

Over \$4 million	1.09%	3
<b>Total</b>		<b>274</b>

### Q27 What was your total F&B revenue, in 2012?

Answered: 273 Skipped: 52



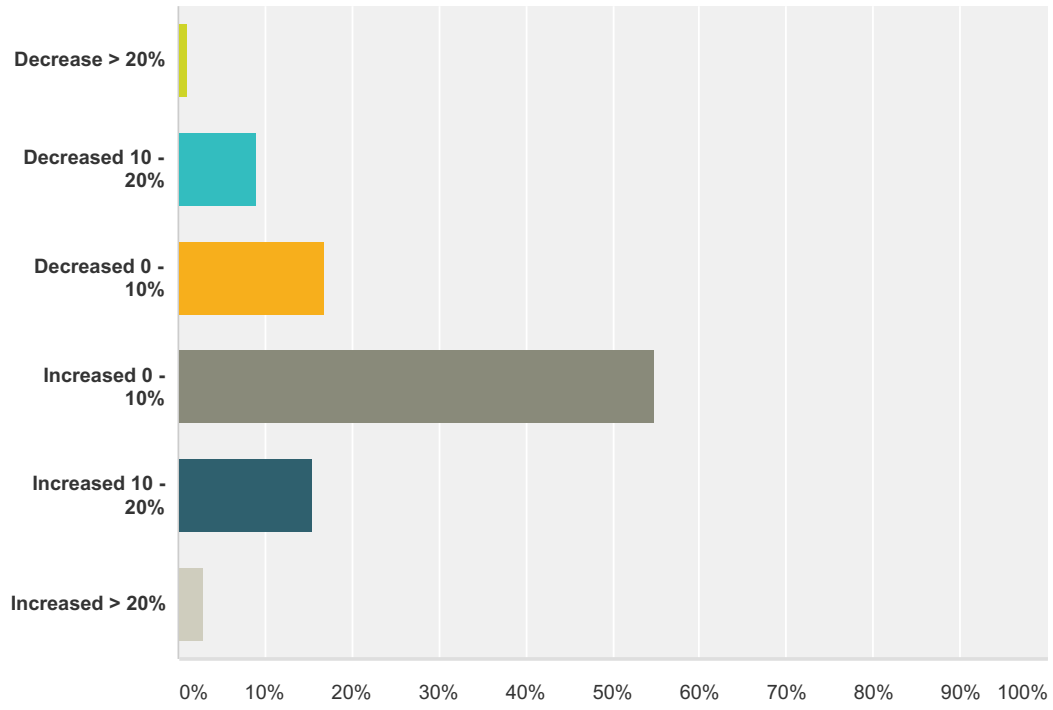
Answer Choices	Responses
0 to \$100,000	24.18% 66
\$100,001 to \$200,000	13.55% 37
\$200,001 to \$400,000	17.58% 48
\$400,001 to \$600,000	14.65% 40
\$600,001 to \$800,000	5.49% 15
\$800,001 to \$1,000,000	8.06% 22
\$1,000,001 to \$1,250,000	6.59% 18
\$1,250,001 to \$1,500,000	4.76% 13
\$1,500,001 to \$1,750,000	0.00% 0
\$1,750,001 to \$2,000,000	0.73% 2
\$2,000,001 to \$2,500,000	2.56% 7

## NGCOA - Canada: Golf Course Benchmarking Survey

\$2,500,001 to \$3,000,000	0.73%	2
\$3,000,001 to \$3,500,000	0.73%	2
\$3,500,001 to \$4,000,000	0.00%	0
Over \$4 million	0.37%	1
<b>Total</b>		<b>273</b>

### Q28 How much have your rates increased/decreased in the past 5 years?

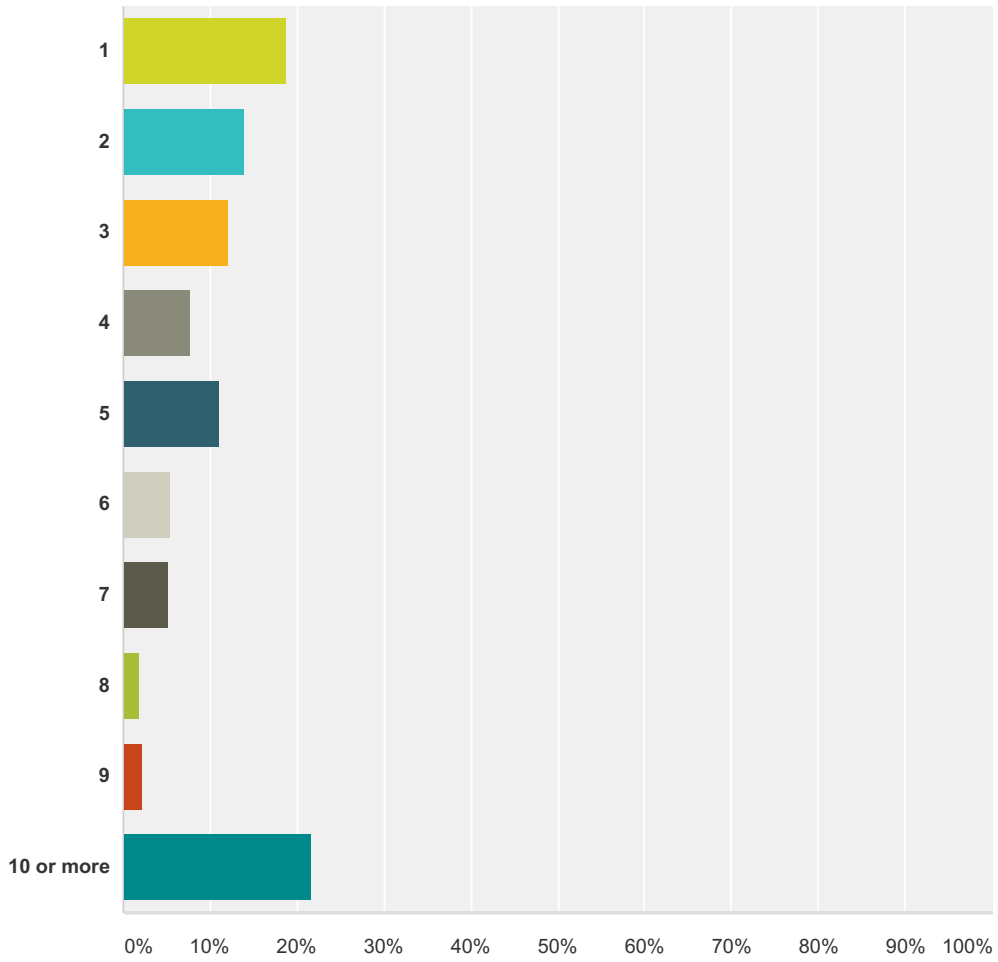
Answered: 279 Skipped: 46



Answer Choices	Responses
Decrease > 20%	1.08% 3
Decreased 10 - 20%	8.96% 25
Decreased 0 - 10%	16.85% 47
Increased 0 - 10%	54.84% 153
Increased 10 - 20%	15.41% 43
Increased > 20%	2.87% 8
<b>Total</b>	<b>279</b>

### Q29 How many full-time year round employees do you employ?

Answered: 272 Skipped: 53

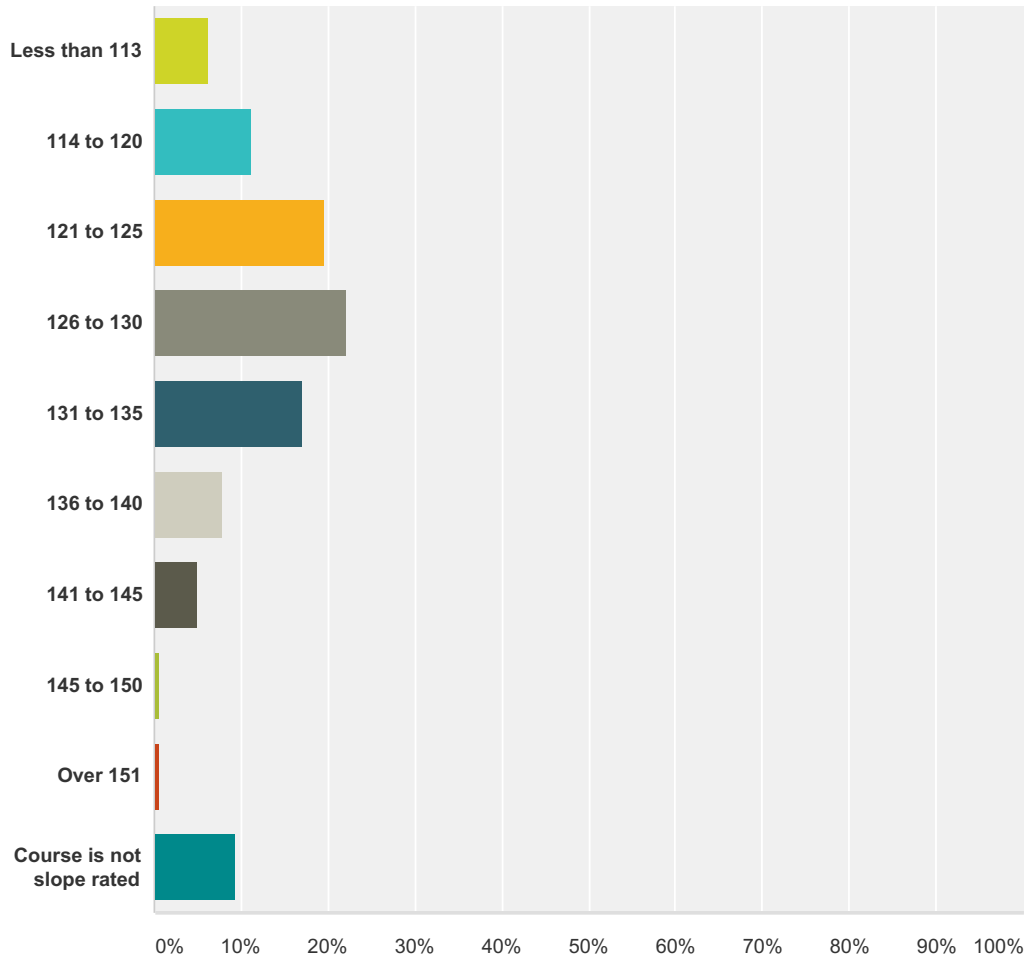


Answer Choices	Responses
1	18.75% 51
2	13.97% 38
3	12.13% 33
4	7.72% 21
5	11.03% 30
6	5.51% 15
7	5.15% 14
8	1.84% 5
9	2.21% 6
10 or more	21.69% 59
<b>Total</b>	<b>272</b>



### Q30 What is the slope rating from your longest tee blocks?

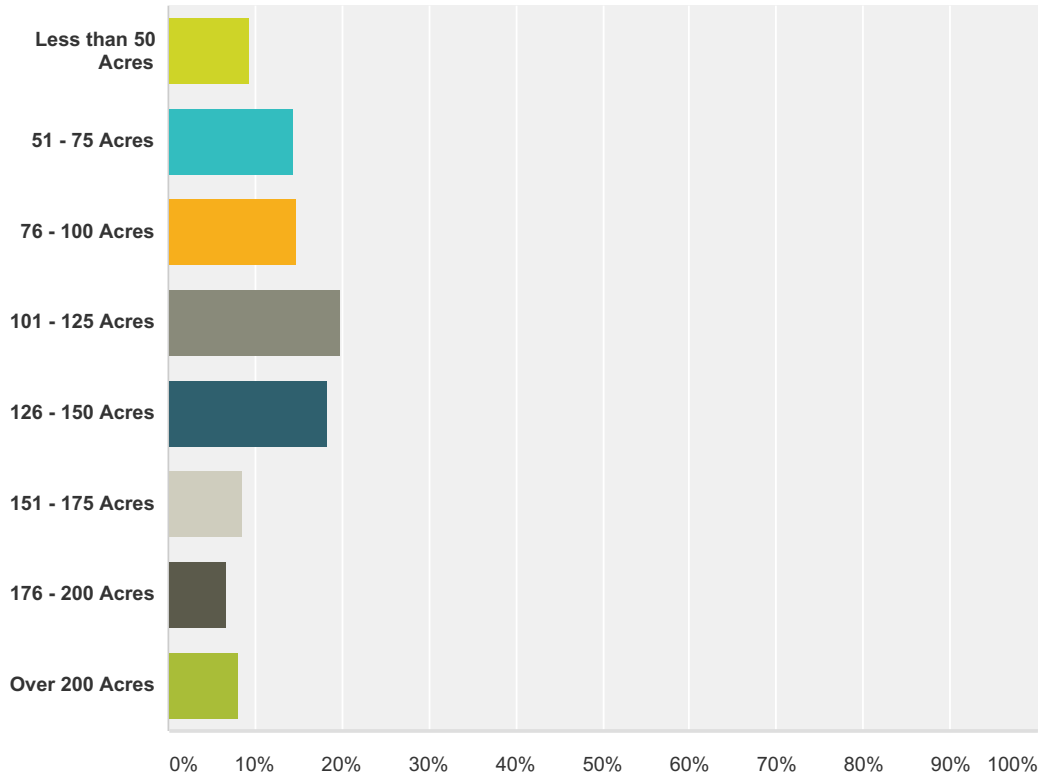
Answered: 276 Skipped: 49



Answer Choices	Responses
Less than 113	6.16% 17
114 to 120	11.23% 31
121 to 125	19.57% 54
126 to 130	22.10% 61
131 to 135	17.03% 47
136 to 140	7.97% 22
141 to 145	5.07% 14
145 to 150	0.72% 2
Over 151	0.72% 2
Course is not slope rated	9.42% 26
<b>Total</b>	<b>276</b>

### Q31 How Many Acres Do You Maintain?

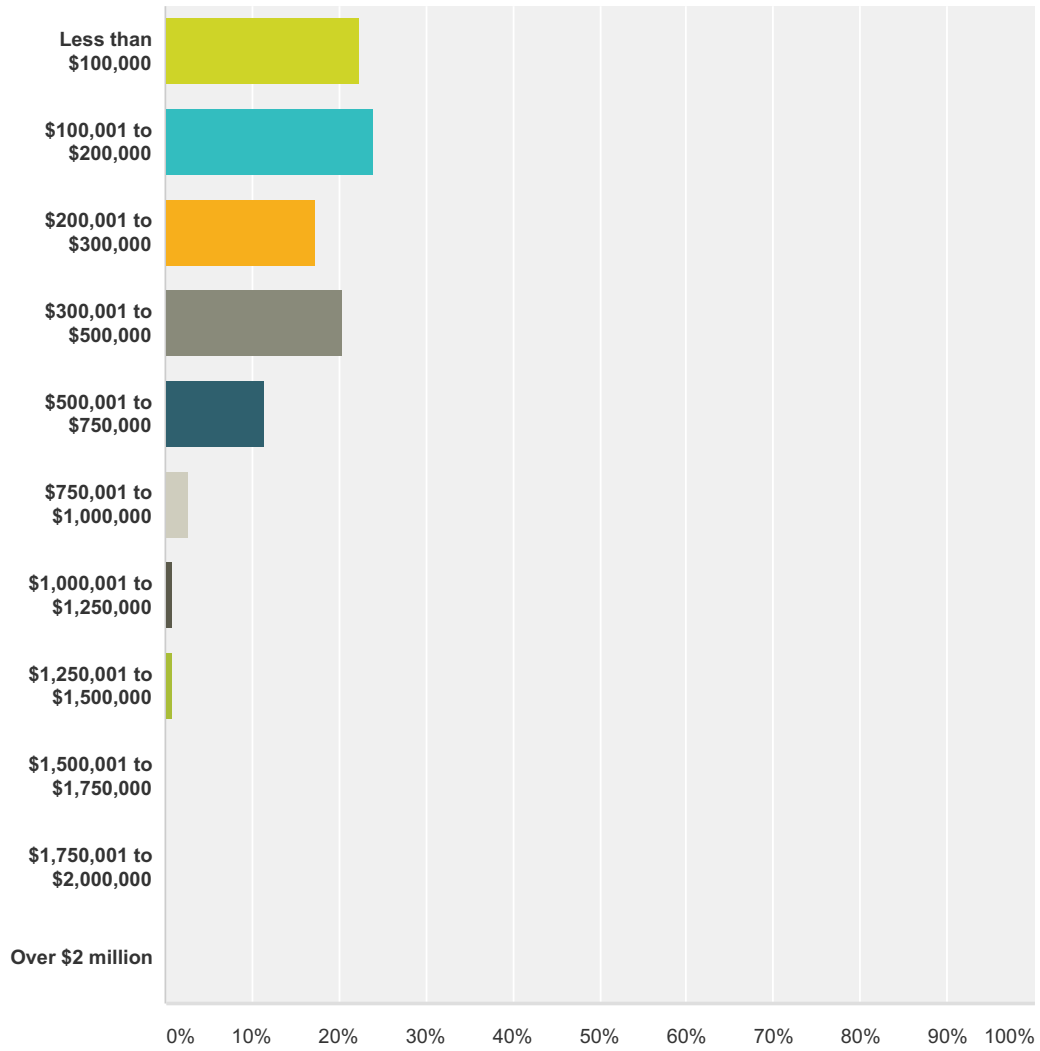
Answered: 257 Skipped: 68



Answer Choices	Responses
Less than 50 Acres	9.34% 24
51 - 75 Acres	14.40% 37
76 - 100 Acres	14.79% 38
101 - 125 Acres	19.84% 51
126 - 150 Acres	18.29% 47
151 - 175 Acres	8.56% 22
176 - 200 Acres	6.61% 17
Over 200 Acres	8.17% 21
<b>Total</b>	<b>257</b>

### Q32 What was your golf course maintenance salary expense, in 2012?

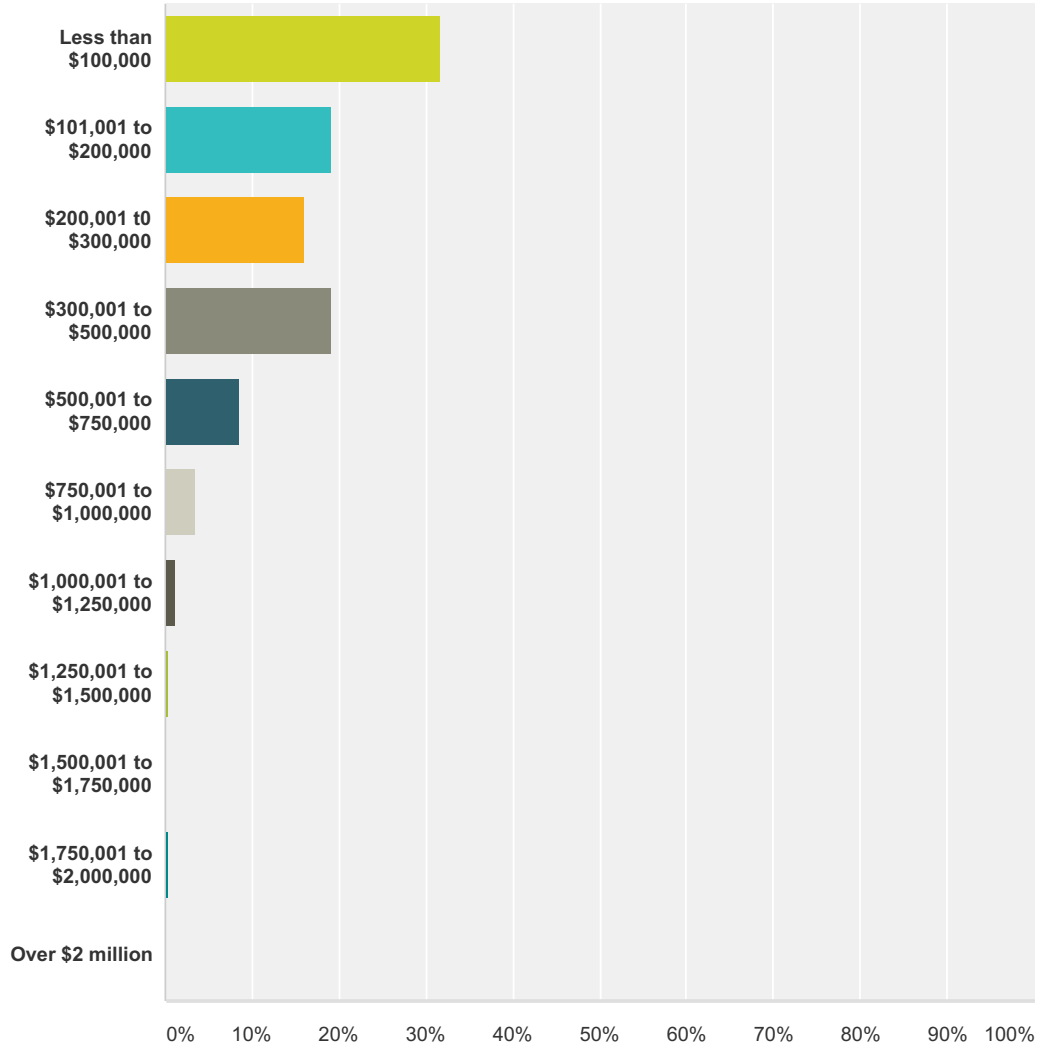
Answered: 254 Skipped: 71



Answer Choices	Responses	
Less than \$100,000	22.44%	57
\$100,001 to \$200,000	24.02%	61
\$200,001 to \$300,000	17.32%	44
\$300,001 to \$500,000	20.47%	52
\$500,001 to \$750,000	11.42%	29
\$750,001 to \$1,000,000	2.76%	7
\$1,000,001 to \$1,250,000	0.79%	2
\$1,250,001 to \$1,500,000	0.79%	2
\$1,500,001 to \$1,750,000	0.00%	0
\$1,750,001 to \$2,000,000	0.00%	0
Over \$2 million	0.00%	0
<b>Total</b>		<b>254</b>

### Q33 What was your total golf course maintenance budget exclusive of salaries, 2012?

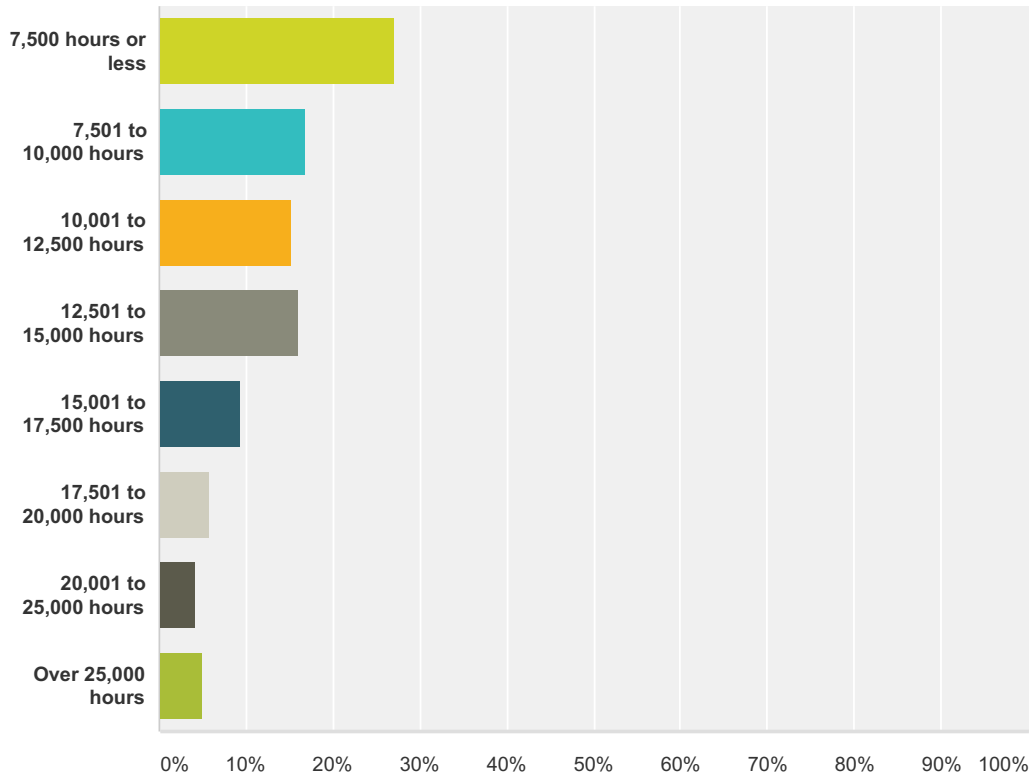
Answered: 256 Skipped: 69



Answer Choices	Responses
Less than \$100,000	31.64% 81
\$101,001 to \$200,000	19.14% 49
\$200,001 to \$300,000	16.02% 41
\$300,001 to \$500,000	19.14% 49
\$500,001 to \$750,000	8.59% 22
\$750,001 to \$1,000,000	3.52% 9
\$1,000,001 to \$1,250,000	1.17% 3
\$1,250,001 to \$1,500,000	0.39% 1
\$1,500,001 to \$1,750,000	0.00% 0
\$1,750,001 to \$2,000,000	0.39% 1
Over \$2 million	0.00% 0
<b>Total</b>	<b>256</b>

### Q34 How many hours are required to maintain your course annually?

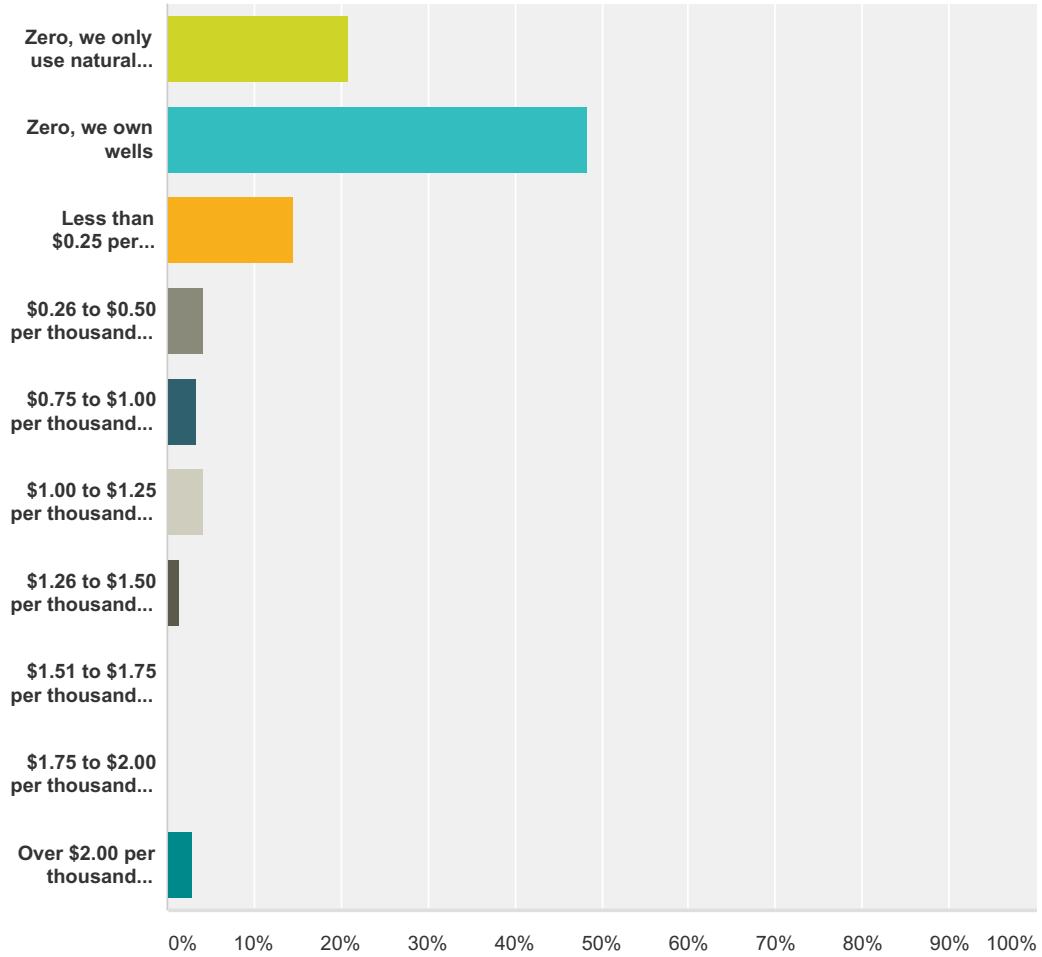
Answered: 236 Skipped: 89



Answer Choices	Responses
7,500 hours or less	27.12% 64
7,501 to 10,000 hours	16.95% 40
10,001 to 12,500 hours	15.25% 36
12,501 to 15,000 hours	16.10% 38
15,001 to 17,500 hours	9.32% 22
17,501 to 20,000 hours	5.93% 14
20,001 to 25,000 hours	4.24% 10
Over 25,000 hours	5.08% 12
<b>Total</b>	<b>236</b>

### Q35 Your annual cost for raw material water, excluding consulting fees, pumping and electrical costs, is...

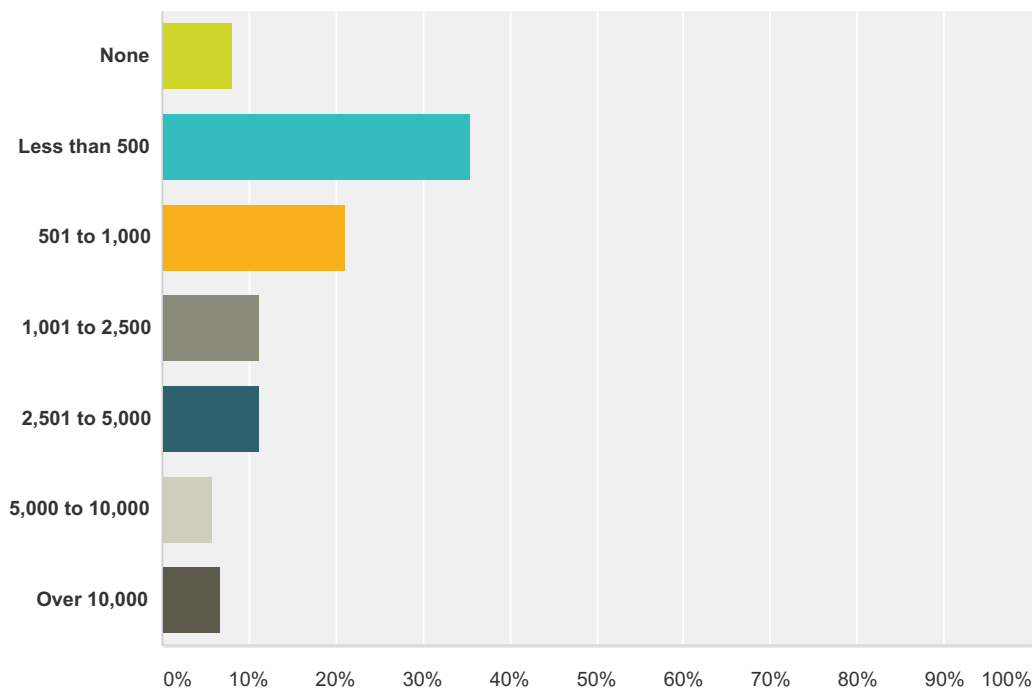
Answered: 211 Skipped: 114



Answer Choices	Responses
Zero, we only use natural rainfall to water the course	20.85% 44
Zero, we own wells	48.34% 102
Less than \$0.25 per thousand gallons (3,785.4 liters)	14.69% 31
\$0.26 to \$0.50 per thousand gallons (3,785.4 liters)	4.27% 9
\$0.75 to \$1.00 per thousand gallons (3,785.4 liters)	3.32% 7
\$1.00 to \$1.25 per thousand gallons (3,785.4 liters)	4.27% 9
\$1.26 to \$1.50 per thousand gallons (3,785.4 liters)	1.42% 3
\$1.51 to \$1.75 per thousand gallons (3,785.4 liters)	0.00% 0
\$1.75 to \$2.00 per thousand gallons (3,785.4 liters)	0.00% 0
Over \$2.00 per thousand gallons (3,785.4 liters)	2.84% 6
<b>Total</b>	<b>211</b>

### Q36 How many email addresses, per 18 holes, do you maintain in your database?

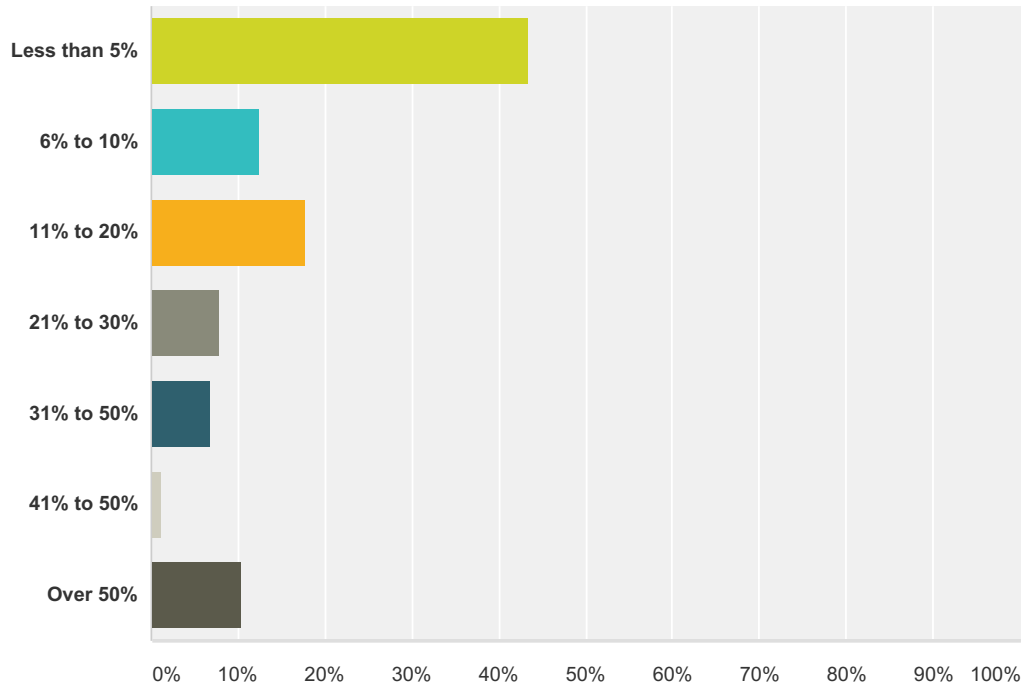
Answered: 256 Skipped: 69



Answer Choices	Responses
None	8.20% 21
Less than 500	35.55% 91
501 to 1,000	21.09% 54
1,001 to 2,500	11.33% 29
2,501 to 5,000	11.33% 29
5,000 to 10,000	5.86% 15
Over 10,000	6.64% 17
<b>Total</b>	<b>256</b>

### Q37 What percent of your tee time reservations are booked via your web site?

Answered: 249 Skipped: 76

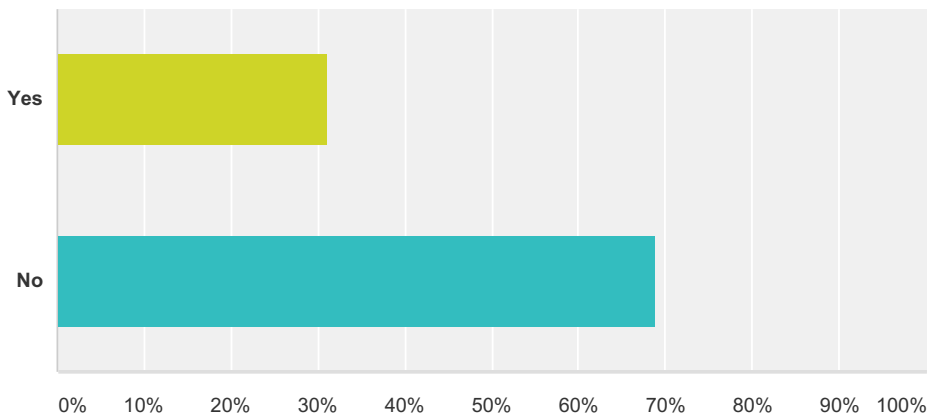


Answer Choices	Responses
Less than 5%	43.37% 108
6% to 10%	12.45% 31
11% to 20%	17.67% 44
21% to 30%	8.03% 20
31% to 50%	6.83% 17
41% to 50%	1.20% 3
Over 50%	10.44% 26
<b>Total</b>	<b>249</b>



**Q38 Did you intend to work with any 3rd party tee time resellers in 2013?**

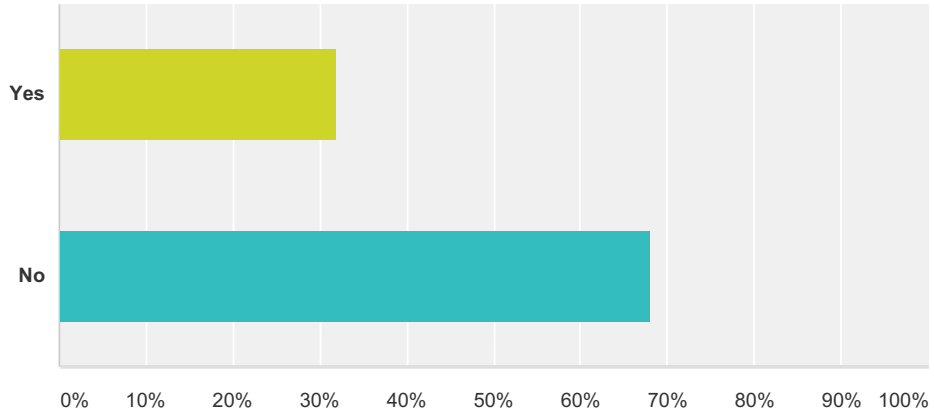
Answered: 258 Skipped: 67



Answer Choices	Responses
Yes	31.01% 80
No	68.99% 178
<b>Total</b>	<b>258</b>

**Q39 Have you utilized any of the NGCOA Canada's best practices as expressed in our position statement on 3rd party tee time resellers?**

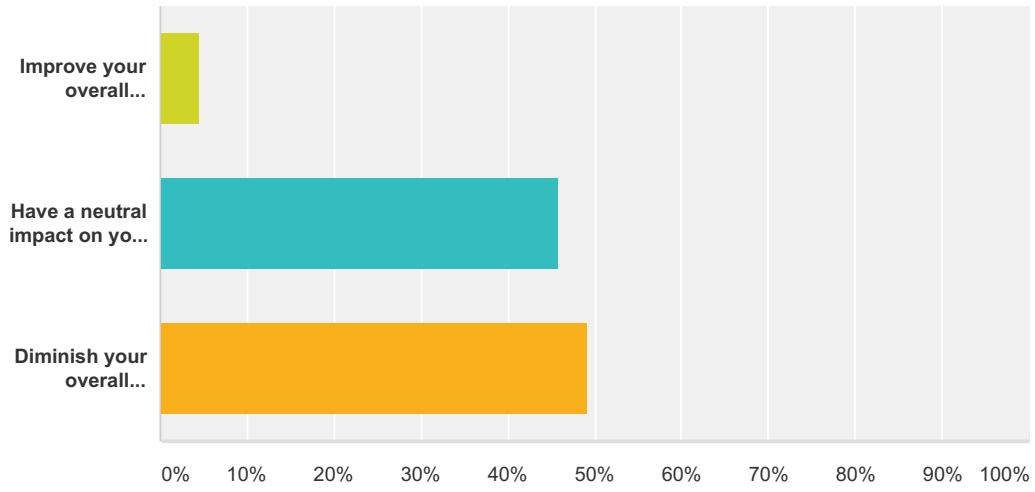
Answered: 254 Skipped: 71



Answer Choices	Responses
Yes	31.89% 81
No	68.11% 173
<b>Total</b>	<b>254</b>

**Q40 Do you believe that 3rd party tee time resellers?**

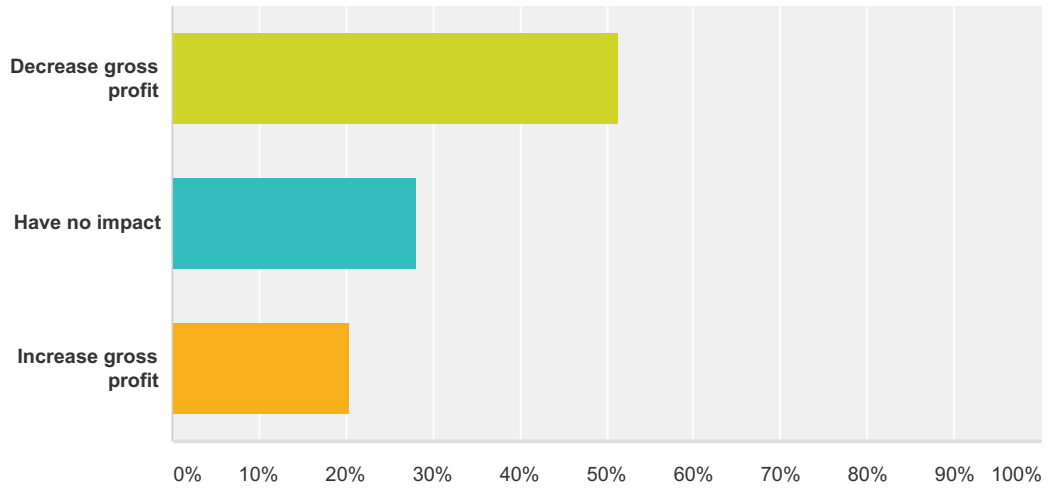
Answered: 237 Skipped: 88



Answer Choices	Responses
Improve your overall customer loyalty	4.64% 11
Have a neutral impact on your overall customer loyalty	45.99% 109
Diminish your overall customer loyalty	49.37% 117
<b>Total</b>	<b>237</b>

### Q41 Do you believe that third party tee time companies?

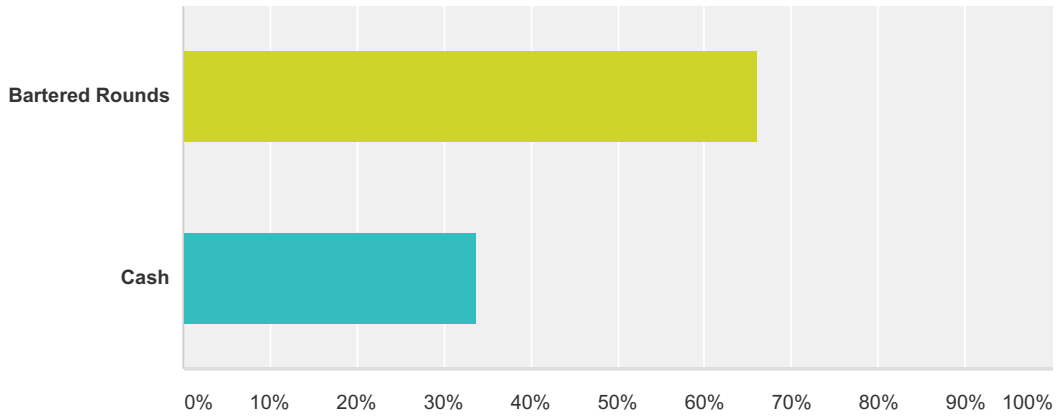
Answered: 230 Skipped: 95



Answer Choices	Responses	Count
Decrease gross profit	51.30%	118
Have no impact	28.26%	65
Increase gross profit	20.43%	47
<b>Total</b>		<b>230</b>

**Q42 What is your preferred method for paying third party tee time companies?**

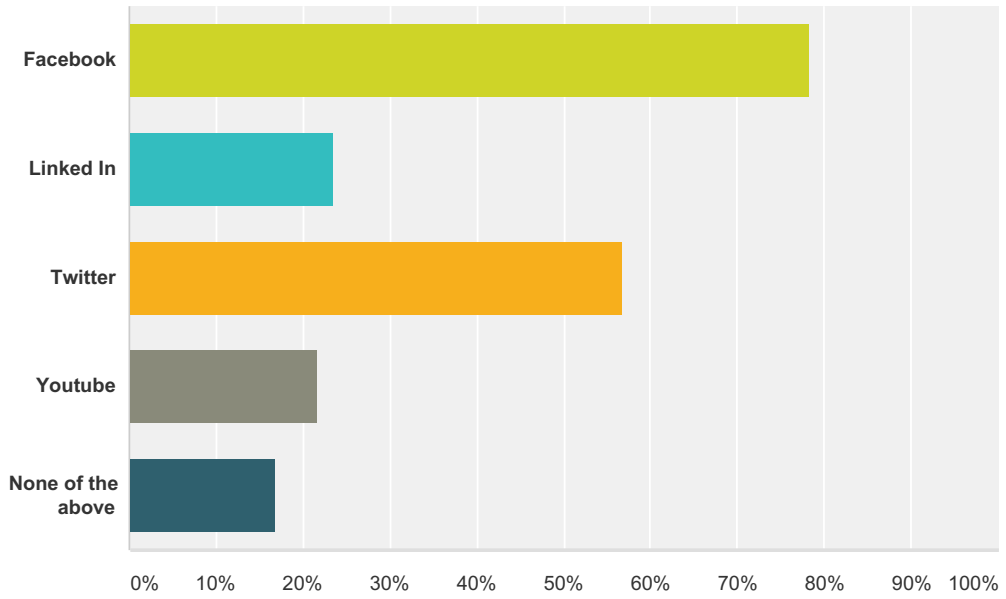
Answered: 160 Skipped: 165



Answer Choices	Responses	
Bartered Rounds	66.25%	106
Cash	33.75%	54
<b>Total</b>		<b>160</b>

**Q43 Does your facility use? Check all that apply.**

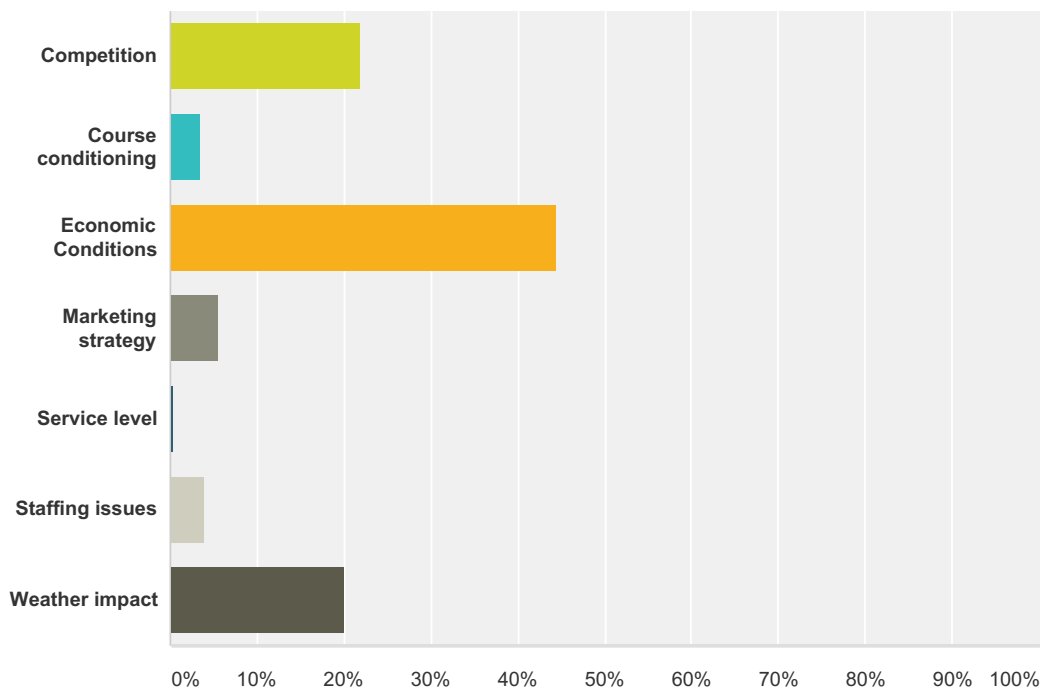
Answered: 259 Skipped: 66



Answer Choices	Responses	Count
Facebook	78.38%	203
Linked In	23.55%	61
Twitter	56.76%	147
Youtube	21.62%	56
None of the above	16.99%	44
<b>Total Respondents: 259</b>		

### Q44 What is the biggest challenge you face?

Answered: 250 Skipped: 75



Answer Choices	Responses
Competition	22.00% 55
Course conditioning	3.60% 9
Economic Conditions	44.40% 111
Marketing strategy	5.60% 14
Service level	0.40% 1
Staffing issues	4.00% 10
Weather impact	20.00% 50
<b>Total</b>	<b>250</b>

**Q45 If you would like to receive a copy of this survey report, please enter your email address? We assure you that your e-mail will not be sold, rented, or given to any other party. NGCOA Canada and Golf Convergence greatly appreciates your assistance in helping formulate the appropriate research to guide our golf industry. Thank you, Jeff Calderwood, Chief Executive Officer: NGCOA Canada JJ Keegan, Managing Principal: Golf Convergence**

Answered: 204 Skipped: 121