

NGF Operations

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and for the predominantly non-profit private facilities, it runs 5.6 percent. In net operating income, the national average for municipals is \$179,000, compared to \$144,000 for daily fee and \$118,000 for private facilities.

The last survey that even approaches the extent of this one was published in 1987. Everything is covered, from maintenance equipment purchases and irrigation upgrades to golf car rentals to clubhouse and course remodeling.

Clubhouse improvements seem more important to owners than golf courses. On a national average, daily-fee facilities spend an annual average of \$56,400 for clubhouse construction/renovation the past five years, compared to \$37,800 for reconstruction/renovation of their golf courses.

"The clubhouse is more immediately visible," Norton reasoned. "Some daily-fees have membership bases ... and their members are also in tune with clubhouse amenities."

The survey made other interesting discoveries among daily-fee facilities:

- The country's hot spots — southern Florida and southern California and western Arizona — made fewer improvements in their courses, maintenance buildings, clubhouses and infrastructure than anywhere else in the country over the last five years?

"That's because they have newer facilities," Norton said.

- On the other hand, nine out of 10 ownerships in the Atlantic Coast region from Massachusetts to Maryland have done renovation work on their courses in the last five years.

"That's because they are older properties," Norton said.

- More courses in the area from northern New England through northern Michigan and Wisconsin than anywhere else — 93 percent — made capital purchases of maintenance equipment and golf cars in the last five years, averaging \$49,400 a year.

That statistic eludes explanation, Norton said.

- The Rockies Mountains east through the Dakota and Nebraska is the "youngest" area in the country in terms of golf courses.

Does that mean it's a prime area for would-be developers to investigate? Norton warned: "There ain't no slam dunks. You have to be highly selective, very sure you've got a population base. Some areas you think might be a bad place to build, would be prime if you have the concept. Areas that look good, might not be. Every location must be looked at for its own merits."

- Golf car use is not required in seven of every 10 courses in Northern California and the coasts of Washington and Oregon.

- In Northern regions there is a trend toward smaller golf car fleets and the easing of golf car usage requirements. The average fleet size in the region was 58 cars, of which

71 percent were leased.

"That area has a long history of golf," Norton said. The Northeast, Midwest and Northwest are a walking mecca, whereas the Sunbelt is a golf car-dominated area.

"The reason is that the courses in the North tend to be older and have an older tradition that includes walking. Newer courses have a higher debt service."

- Texas, Oklahoma and New Mexico have the lowest median golf car fee (\$8) anywhere in the country.

- Average annual expenditures over the last five years nationwide include \$20,300 for maintenance

building construction/renovation; \$49,400 for maintenance equipment/golf car purchases; \$28,000 for irrigation installation/upgrade; and \$20,500 for infrastructure improvements.

"This [survey] is the format we will take into the future. We will get trend data when we do it again in two years," Norton said. He added that the NGF will begin to do the surveys every other year: the municipal survey one year and daily-fee and private surveys the next.

The reports are available from the NGF at 1150 South U.S. Highway One, Jupiter, Fla. 33477; telephone 407-744-6006.

CMAA survey paints frightening picture

ALEXANDRIA, Va. — The Club Managers Association of America (CMAA) has announced results of a survey on the projected effect of losing dues and meals deductions.

The survey was commissioned in response to the Omnibus Budget Reconciliation Act of 1993 (S.1134), which would reduce the deductible portion of business meals and entertainment expenses from 80 percent to 50 percent and

would also eliminate the deduction for club membership fees. The survey shows that the legislation could result in:

- A loss of more than 12,500 full-time and 11,000 part-time employees, for a total of 23,500 employees in the 3,000 clubs represented by this sample;

- A loss of more than \$273 million in full-time payroll and \$100 million in part-time payroll, for a total of \$373 million in these businesses.

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