

The golf boom took the industry by surprise. From a sport generally reserved for the elite, it became every man's game. And the industry suddenly found itself adding its expenditures and sales in the millions. There was little time to keep detailed statistical records of this phenomenal activity—everybody was too busy manufacturing, buying and selling at a frenzied speed.

Although the boom continues, the industry has grown accustomed to the realm of big business. And now, in attempting to analyze what occurred, it has become apparent that the industry is sorely in need of statistics upon which to gauge its future growth. Many major golf industry foundations and associations currently are involved in excellent surveys and studies that will turn former guesswork into solid estimates and statistics. And GOLFDOM is anxious to take on its share of this enormous task.

Last year, GOLFDOM's First Annual Marketing and Research Issue offered pros, superintendents and club managers some sound figures by which they could compare their performances. For this second endeavor, GOLFDOM engaged an independent research organization to help with a study that would delve even more deeply. Aware that pro shop and clubhouse operations at different types of golf facilities can vary considerably, we decided that sales and expenditure figures should be broken down, wherever possible, by major types of facilities—private, semi-private, hotel/resort and public. In this way, a pro or club manager may compare his performance with that of his exact counterpart. And in the case of the superintendent, it was determined that the size of a facility makes a considerable difference in the amounts of materials and equipment he utilizes. Therefore, again wherever possible, figures on course maintenance materials, equipment and labor have been broken into three major size categories—9-hole facilities, facilities of 18 holes or more and non-regulation size courses (par-three, executive, etc.). Through this approach, GOLFDOM's Second Annual Marketing and Research Issue brings some interesting differences to light and makes the figures of greater significance.

Each year, we will attempt to make such improvements in our study and increase its depth, in the hope that we can contribute to the success of our readers and the golf industry.

Finding Out Where Golf is Heading

Superintendents

... spent more than ever before in 1969 and are likely to exceed their budgets for 1970

Golf course superintendents spent almost \$67 million on turf materials (chemicals, fertilizers and grass seed) in 1969, to keep courses at some 10,000 United States golf facilities in good shape. Expenditures for major course improvements totaled almost \$72 million, and golf course labor, exclusive of superintendents' salaries, was a staggering \$235.3 million.

GOLFDOM's Second Annual Marketing and Research Study found that almost 15 per cent more was spent on turf materials in 1969 than in 1968, and labor expenditures climbed 16 per cent. In view of these increases, superintendents seem to have been

rather conservative in budgeting for these two categories in 1970. Superintendents have slated about \$1.5 million less for turf materials in 1970 than was spent in 1969 and only \$21.7 million more for labor in 1970, representing a decrease of 2.2 per cent and an increase of 9.2 per cent, respectively.

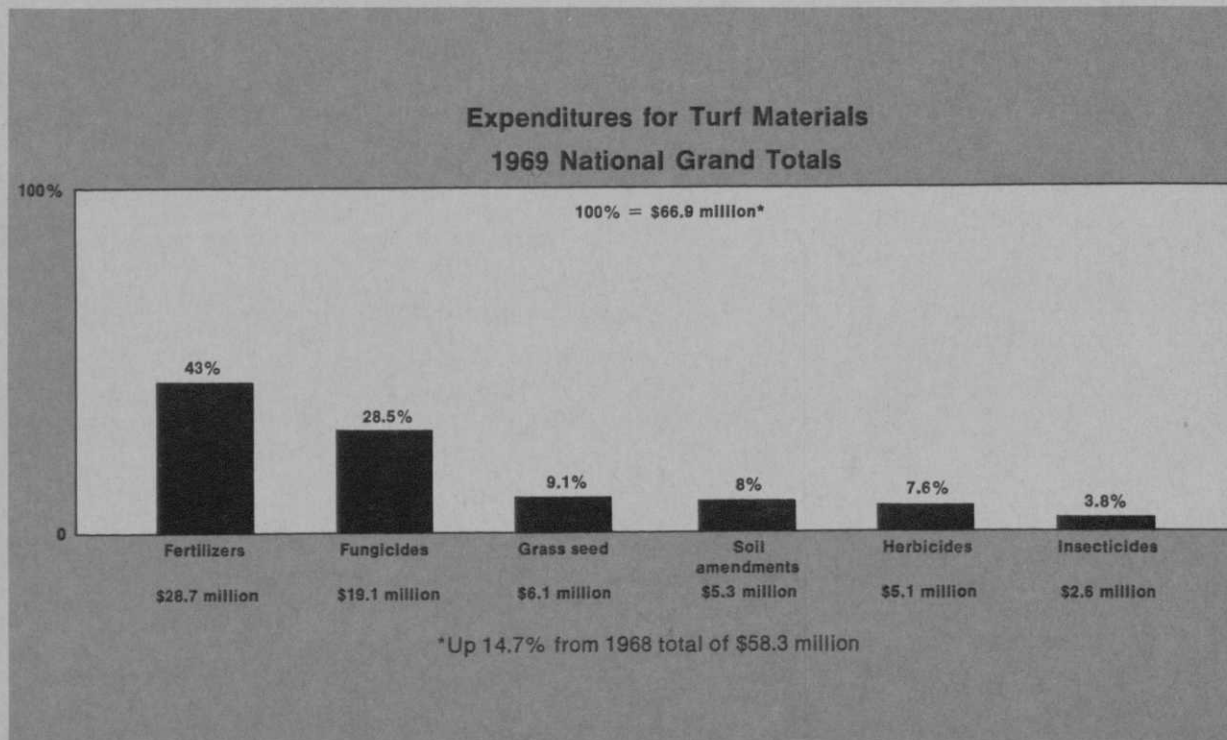
Expenditures for course improvements declined sharply in 1969 and even less is budgeted for 1970. Totals in this category went from almost \$114 million in 1968 to \$71.8 million in 1969, and only \$67 million is slated for 1970. In the breakdown by size of course—9 holes, 18 holes or larger and non-regulation—the 18-hole or larger courses were

primarily responsible for the drop in national grand totals, spending an average per facility of \$22,800 in 1968, \$12,600 in 1969, and budgeting \$10,500 for 1970. Nine-hole and non-regulation courses, on the other hand, indicate slight increases from 1968 to 1970.

Fertilizers account for the largest share of expenditures for turf materials—almost \$28.7 million, or 43 per cent of the national total in 1969. Fungicides take second place, with \$19.1 million, or 28.5 per cent of the total. Grass seed is third, with \$6.1 million, or 9.1 per cent; soil amendments, \$5.3 million, or 8 per cent; herbicides, \$5.1 million, or 7.6 per cent; and insecticides, \$2.6 million, or 3.8 per cent.

continued

See page 46 for explanatory notes on tables and graphs.



Average Expenditures for Turf Materials

Size of facility	Fertilizers	Fungicides	Grass seed	Soil amendments	Herbicides	Insecticides
9-hole						
1968	\$1,100	\$590	\$370	\$180	\$190	\$160
1969	\$1,300	\$580	\$340	\$240	\$250	\$120
Budget 1970	\$1,500	\$700	\$300	\$210	\$260	\$180
18-hole or more						
1968	\$4,000	\$2,900	\$1,000	\$890	\$680	\$640
1969	\$4,900	\$3,700	\$1,000	\$900	\$830	\$470
Budget 1970	\$5,000	\$2,400	\$1,000	\$1,100	\$1,000	\$560
Non-regulation						
1968	\$1,600	\$480	\$150	\$270	\$410	\$90
1969	\$1,700	\$590	\$140	\$360	\$390	\$80
Budget 1970	\$1,800	\$730	\$130	\$400	—*	\$110

* Insufficient response precludes deriving a valid average.

National Expenditures for Turf Materials

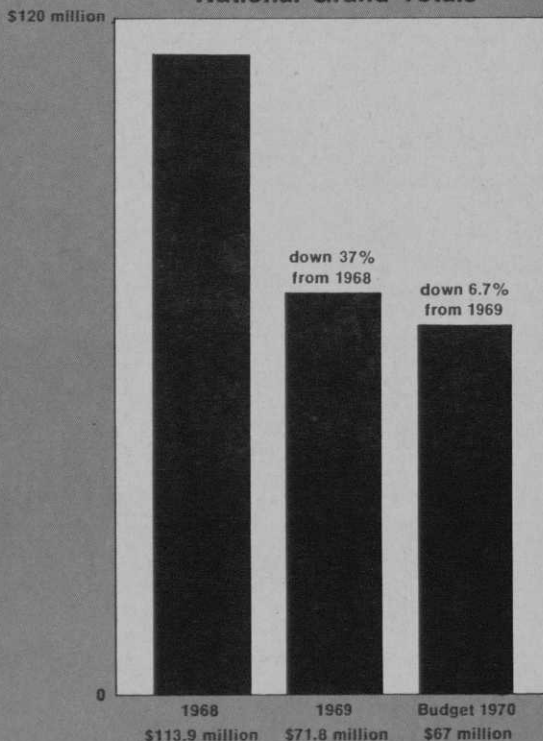
Size of facility	Fertilizers	Fungicides	Grass seed	Soil amendments	Herbicides	Insecticides
9-hole						
1968	\$5.3 million	\$2.7 million	\$1.7 million	\$840,000	\$899,000	\$732,000
1969	\$6.1 million	\$2.7 million	\$1.6 million	\$1.1 million	\$1.2 million	\$547,000
Budget 1970	\$7.1 million	\$3.3 million	\$1.4 million	\$992,000	\$1.2 million	\$816,000
18-hole or more						
1968	\$17.2 million	\$12.2 million	\$4.3 million	\$3.8 million	\$2.9 million	\$2.7 million
1969	\$20.8 million	\$15.8 million	\$4.4 million	\$3.8 million	\$3.5 million	\$2 million
Budget 1970	\$21 million	\$10.3 million	\$4.4 million	\$4.6 million	\$4.3 million	\$2.4 million
Non-regulation						
1968	\$1.6 million	\$482,000	\$149,000	\$272,000	\$415,000	\$ 92,000
1969	\$1.7 million	\$588,000	\$142,000	\$363,000	\$388,000	\$ 84,000
Budget 1970	\$1.8 million	\$734,000	\$126,000	\$402,000	————*	\$105,000

* Insufficient response precludes deriving a valid total expenditure

Expenditures for Golf Course Improvements

Course size	Average per facility	National totals
9-hole		
1968	\$3,200	\$15 million
1969	\$3,400	\$15.8 million
Budget 1970	\$4,000	\$18.7 million
18-hole or more		
1968	\$22,800	\$97 million
1969	\$12,600	\$53.8 million
Budget 1970	\$10,500	\$44.9 million
Non-regulation		
1968	\$1,900	\$2 million
1969	\$2,200	\$2.2 million
Budget 1970	\$3,400	\$3.4 million

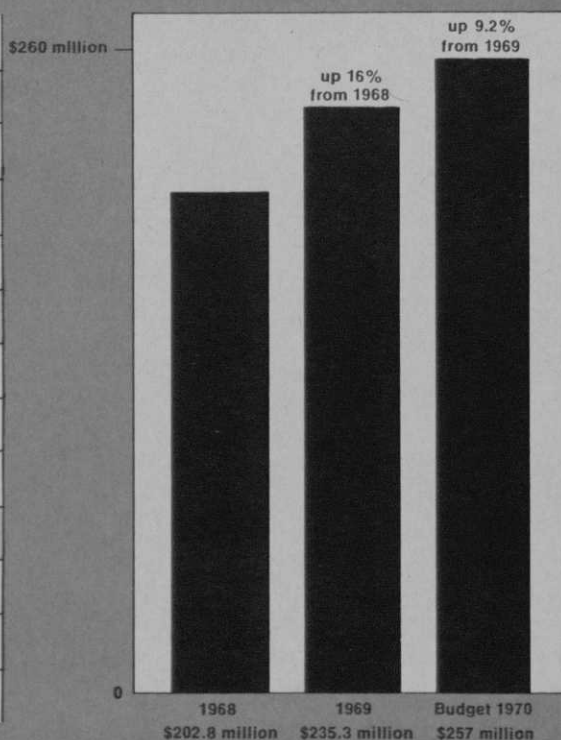
Expenditures for Golf Course Improvements
National Grand Totals



Expenditures for Golf Course Labor*

Course size	Average per facility	National totals
9-hole		
1968	\$8,500	\$39.2 million
1969	\$10,900	\$50.4 million
Budget 1970	\$11,100	\$51.5 million
18-hole or more		
1968	\$35,000	\$149 million
1969	\$39,600	\$168.5 million
Budget 1970	\$43,300	\$184.3 million
Non-regulation		
1968	\$14,500	\$14.5 million
1969	\$16,300	\$16.4 million
Budget 1970	\$21,100	\$21.2 million

Expenditures for Golf Course Labor*
National Grand Totals



* Exclusive of superintendents' salaries

Annual Superintendents' Salaries
(Per cent of responses in each course type)

Course type	\$5,000-\$10,000	\$10,001-\$12,000	\$12,001-\$15,000	\$15,001-\$20,000
Private	35.2%	29.6%	17%	18.2%
Semi-private	78.6%	14.3%	7.1%	0%
Hotel/Resort	50%	33.4%	8.3%	8.3%
Public	68.4%	21%	5.3%	5.3%
Non-regulation	33.3%	66.7%	0%	0%

SUPERINTENDENTS

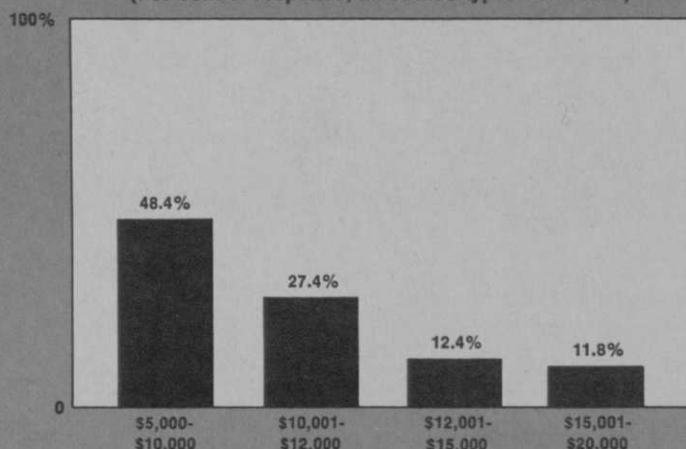
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per cent; herbicides, \$5.1 million or 7.6 per cent; and insecticides, \$2.6 million, or 3.8 per cent. In all categories it was found that courses 18 holes or larger, per facility, spent at least triple the amount spent by 9-hole courses.

Examining the labor costs by course size, the survey indicated that superintendents at courses 18 holes or larger have an average of five full-time and six part-time employees on their staffs, and spent \$39,600 for labor in 1969. Superintendents at 9-hole courses have an average of two full-time and three part-time employees and spent an average of \$10,900 for labor in 1969. Non-regulation courses maintain an average of three full-time and two part-time employees and spent \$16,300 per facility for labor in 1969. In addition to the larger staffs employed by the courses of 18 holes or more, another factor which could account, in part, for the disparity in labor expenditures between 18-hole or larger facilities and the 9-hole courses are the seasons of play. Only 43 per cent of the superintendents at 9-hole courses indicated that their facilities were open for play the year-round, whereas almost 60 per cent of the superintendents at courses 18 holes or larger reported that their facilities were open year-round.

Superintendents' Salaries

(Per cent of response, all course types combined)



GOLFDOM's study also indicated that superintendents at private clubs are generally better paid than those at the four other types of facilities—semi-private, hotel/resort, public and non-regulation. Some 17 per cent of the responses from private club superintendents were in the \$12,001 to \$15,000 salary range, and 18.2 per cent fell into the \$15,001 to \$20,000 range. No superintendents indicated salaries over \$20,000 per year. Responses for superintendent salaries, combining all types of facilities, broke down this way: \$5,000 to \$10,000, 48.4 per cent; \$10,001 to \$12,000, 27.4 per cent; \$12,001 to \$15,000, 12.4 per cent; \$15,001 to \$20,000, 11.8 per cent.

In terms of total investment to date, United States golf course superintendents supervise the usage of golf course equipment

that represents a total national investment of almost \$535 million. Of this total, irrigation equipment accounted for almost 45.6 per cent of the national total investment to date in equipment. Tractors represented the second highest investment, with a national figure of more than \$74.9 million, or 14 per cent of the total. Mowers were a close third, with more than \$71.8 million, or 13.4 per cent of the total.

With only one exception, the course of 18 holes or larger has invested at least twice as much in various equipment categories as the 9-hole course (see chart for breakdown on averages). And in irrigation equipment, 18-hole or larger facilities have invested almost five times more per facility than the 9-hole courses.

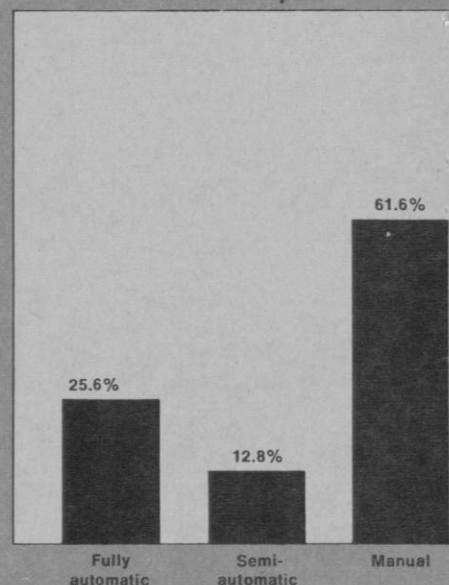
Installations of fully automatic

continued

Types of Irrigation Systems Presently Installed

Response by course size			
Course size	Automatic	Semi-automatic	Manual
9-hole	20%	11.7%	68.3%
18-hole or more	29.2%	13.2%	57.6%
Non-regulation	16.7%	16.7%	66.6%
Response by course type			
Course type	Automatic	Semi-automatic	Manual
Private	25.4%	13.2%	61.4%
Semi-private	23.6%	14.6%	61.8%
Hotel /Resort	40%	13.3%	46.7%
Public	23.8%	4.8%	71.4%

Overall Response



SUPERINTENDENTS

continued

and semi-automatic irrigation systems apparently are making strong headway. Nearly 39 per cent of the superintendents responding indicated that their facilities already have either fully automatic or semi-automatic systems. Of those who said they have such irrigation systems, more than 68 per cent were superintendents at 18-hole courses.

Superintendents who said they did not have fully automatic or semi-automatic systems were

asked if they plan to convert to either of the two irrigation systems. More than 38 per cent of the respondents to this question replied that they did have such plans. The overwhelming majority of these, 70 per cent, were superintendents at private facilities with 9 and 18 holes or more.

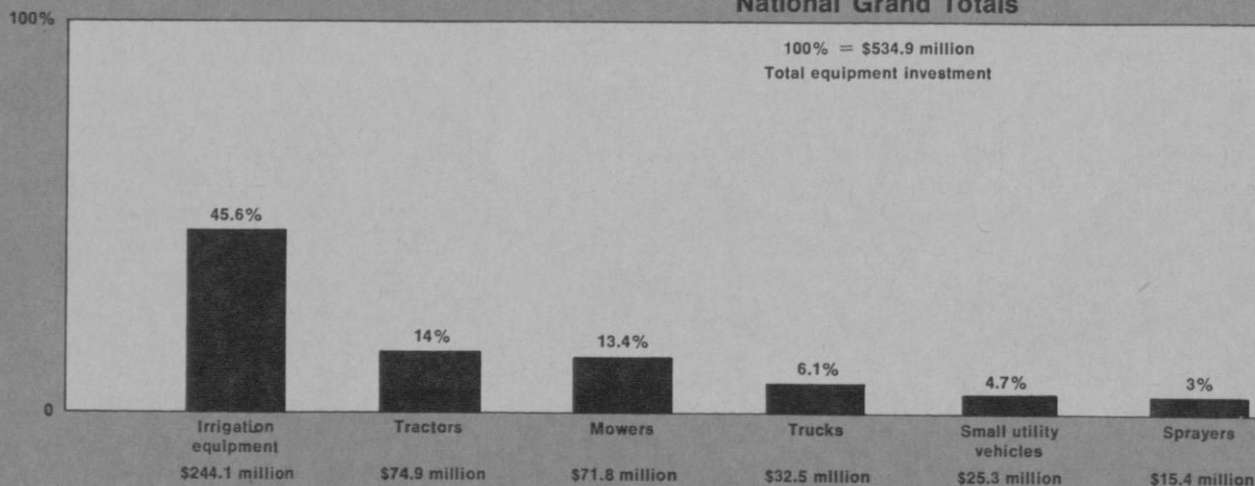
Those who said they plan to convert to either fully automatic or semi-automatic irrigation systems were asked to estimate when the new systems would be installed. Almost 63 per cent of the respondents indicated various dates from this year to 1971. □

Notes: National grand totals in this golf course superintendent study are based on the total 9,894 golf facilities in the United States, regulation and non-regulation courses combined. Since the amount of materials and equipment needed by a superintendent is primarily influenced by the size of the course which he and his staff maintain, figures in this study are broken down by the common size categories: 9 holes, 18 holes or more and non-regulation (par-three, executive, etc.).

For purposes of also giving national totals by size of facility,

Equipment Investment to Date

National Grand Totals



the following figures were used to project our averages: 9-hole facilities, 4,636; facilities of 18 holes or more, 4,254; non-regulation facilities, 1,004.

However, in two cases—superintendents' salaries and types of irrigation systems—figures are given by five course classifications: private, semi-private, ho-

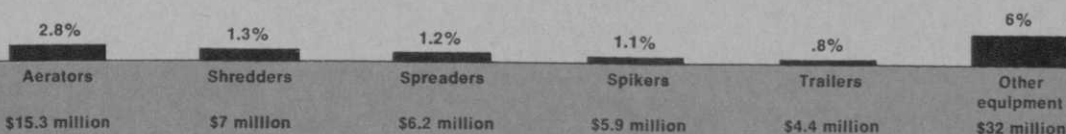
tel/resort, public and non-regulation. For purposes of national totals the following breakdown on number of facilities was used: private, 3,738; semi-private, 3,581; hotel resort, 400; public, 1,171; non-regulation, 1,004.

Figures in the millions have been rounded to the nearest hundred thousand dollars; figures

in the thousands have been rounded to the nearest hundred dollars, and figures in the hundreds have been rounded to the nearest ten dollars. Therefore, rounded national totals, when added, may not precisely agree with the national grand totals, since these are the sums of unrounded figures.

Average Total Investment to Date for Equipment

	9-hole	18-hole or more	Non-regulation
Irrigation equipment	\$9,400	\$45,700	\$6,000
Tractors	\$4,300	\$11,200	\$7,400
Mowers	\$4,500	\$10,900	\$4,500
Trucks	\$2,200	\$4,500	\$3,000
Small utility vehicles	\$1,200	\$4,300	\$1,200
Sprayers	\$940	\$2,400	\$780
Aerators	\$900	\$2,400	\$580
Shredders	\$420	\$960	\$1,000
Spreaders	\$440	\$870	\$470
Spikers	\$500	\$700	\$590
Trailers	\$220	\$720	\$290
Other equipment	\$1,500	\$ 5,800	\$500



Professionals

... fought back last summer's bad weather and sales lag
to top record revenues made in 1968

Gross Pro Shop Sales

Type of Course	Irons		Woods		Putters	
	Average per facility	National totals	Average per facility	National totals	Average per facility	National totals
Private						
1968	\$4,500	\$14.4 million	\$3,800	\$12.2 million	\$1,300	\$4.2 million
1969	\$5,700	\$18.3 million	\$4,000	\$12.8 million	\$930	\$3 million
Semi-private						
1968	\$4,600	\$11 million	\$2,700	\$6.5 million	\$1,000	\$2.4 million
1969	\$3,700	\$8.9 million	\$3,300	\$7.9 million	\$810	\$1.9 million
Hotel/Resort						
1968	\$1,200	\$460,000	\$3,400	\$1.4 million	\$960	\$384,000
1969	\$2,100	\$851,000	\$2,700	\$1.1 million	\$340	\$134,800
Public						
1968	\$5,000	\$8.3 million	\$2,600	\$4.4 million	\$630	\$1.1 million
1969	\$4,600	\$7.7 million	\$2,500	\$4.2 million	\$710	\$1.2 million

Type of Course	Golf shoes		Men's apparel		Women's apparel	
	Average per facility	National totals	Average per facility	National totals	Average per facility	National totals
Private						
1968	\$2,600	\$8.4 million	\$3,300	\$10.7 million	\$2,300	\$7.6 million
1969	\$2,600	\$8.4 million	\$4,800	\$15.4 million	\$5,600	\$17.9 million
Semi-private						
1968	\$2,400	\$5.8 million	\$3,000	\$7.3 million	\$2,300	\$4.7 million
1969	\$4,700	\$11.4 million	\$4,900	\$11.7 million	\$2,600	\$6.1 million
Hotel/Resort						
1968	\$1,200	\$493,200	\$3,300	\$1.3 million	\$4,200	\$1.7 million
1969	\$2,700	\$1.1 million	\$5,400	\$2.1 million	\$3,700	\$1.5 million
Public						
1968	\$520	\$867,400	\$770	\$1.3 million	\$1,300	\$2.2 million
1969	\$980	\$1.6 million	\$910	\$1.5 million	\$520	\$870,700

Despite pros' complaints about bad summer weather over much of the nation in 1969, pro shop sales apparently rallied during the latter part of the year when many golfers enjoyed lengthy Indian summers. With only two

exceptions, total pro shop sales in each product category made some hefty increases over what many pros consider the record year of 1968. GOLFDOM's Second Annual Marketing and Research Study found that the esti-

mated 7,700 pro shops at the nation's regulation golf facilities sold \$247.7 million worth of merchandise in 1969—\$49.7 million, or 25.1 per cent, over 1968.

Examining the 1969 national

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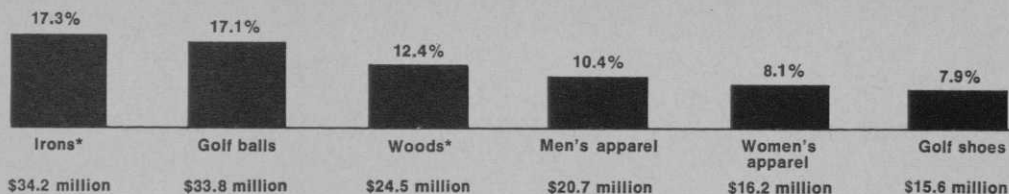
Utility clubs		Bags		Headcovers		Golf balls	
Average per facility	National totals	Average per facility	National totals	Average per facility	National totals	Average per facility	National totals
\$650	\$2.1 million	\$1,600	\$5.2 million	\$580	\$1.9 million	\$4,600	\$14.8 million
\$680	\$2.2 million	\$2,300	\$7.5 million	\$430	\$1.4 million	\$6,800	\$22.1 million
\$590	\$1.4 million	\$990	\$2.4 million	\$370	\$881,500	\$4,700	\$11.3 million
\$710	\$1.7 million	\$1,900	\$4.6 million	\$580	\$1.4 million	\$6,000	\$14.4 million
\$150	\$60,000	\$740	\$294,000	\$210	\$82,400	\$4,200	\$1.7 million
\$210	\$85,600	\$550	\$221,200	\$220	\$86,000	\$3,800	\$1.5 million
\$200	\$328,600	\$1,100	\$1.9 million	\$520	\$859,000	\$3,600	\$6.1 million
\$220	\$363,600	\$1,100	\$1.8 million	\$220	\$358,600	\$4,600	\$7.7 million

Golf gloves		Novelties & Gadgets		Other	
Average per facility	National totals	Average per facility	National totals	Average per facility	National totals
\$1,400	\$4.5 million	\$1,800	\$5.8 million	\$2,000	\$6.4 million
\$1,500	\$4.8 million	\$1,400	\$4.5 million	\$2,300	\$7.4 million
\$980	\$2.4 million	\$770	\$1.9 million	\$1,200	\$2.9 million
\$940	\$2.3 million	\$1,900	\$4.5 million	\$660	\$1.6 million
\$1,200	\$476,000	\$330	\$130,000	\$3,300	\$1.3 million
\$2,300	\$914,000	\$1,100	\$444,400	\$4,000	\$1.6 million
\$690	\$1.1 million	\$260	\$437,000	\$220	\$362,000
\$1,000	\$1.7 million	\$540	\$894,000	\$490	\$815,700

See page 60 for explanatory notes on tables and graphs.

**Gross Pro Shop Sales
1968 National Grand Totals**

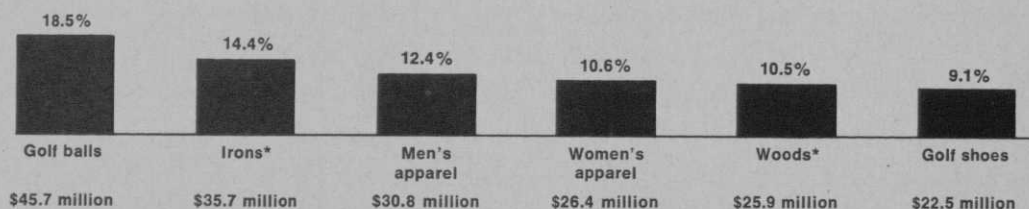
100% = \$198-million



*Sales of the four golf club categories combined totaled

**Gross Pro Shop Sales
1969 National Grand Totals**

100% = \$247.7 million (up 25.1% from 1968)



*Sales of the four golf club categories combined totaled

PROFESSIONALS

continued

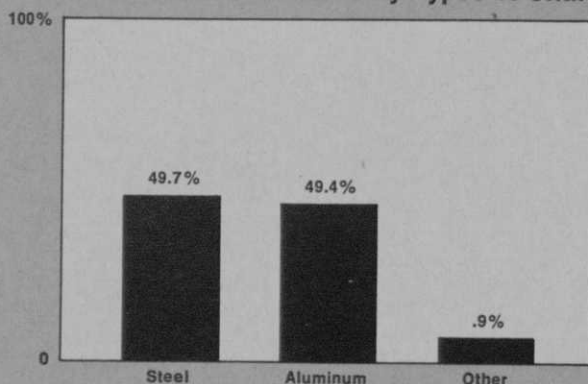
grand total for sales in each category revealed the following percentages of increase in dollar volumes over 1968: women's apparel, up 62.9 per cent; men's apparel, up 46.9 per cent; golf shoes, up 44.2 per cent; golf bags, up 43.8 per cent; utility clubs, up 43.6 per cent; golf balls, up 35.2 per cent; woods, up 25.1 per cent; novelties and gadgets, up 24.1 per cent; golf gloves up 15.5 per cent; irons, up 4.4 per cent; other, or miscellaneous, products, up 4.6 per cent. Putters and headcovers were the only two categories which showed decreases in total national dollar volumes—down 21.1 per cent and 13.5 per cent respectively.

Comparing these same 1968 and 1969 dollar volumes in terms of each product category's percentage of total national pro shop sales appears to back up pros who said that golfers were holding back on major purchases of new equipment last summer. This hesitancy apparently caused some re-shuffling among the leading dollar volume products. In 1969, irons dropped back to second place, constituting 14.4 per cent

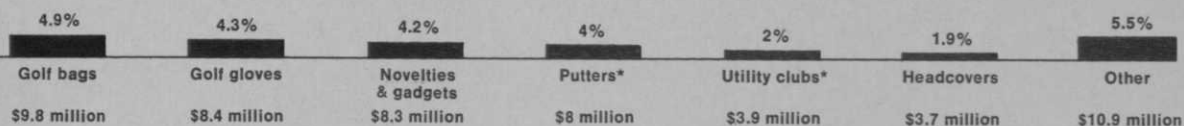
Golf Club Sales by Types of Shafts*

Type of Course	Steel	Aluminum	Other
Private	42.9%	55.3%	1.8%
Semi-private	54.3%	45.1%	.6%
Hotel/Resort	51.4%	48.6%	0%
Public	64%	36%	0%

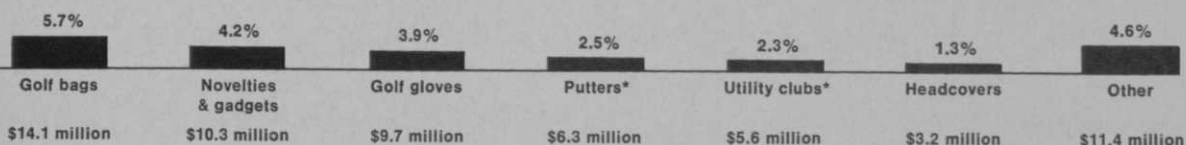
National Golf Club Sales by Types of Shafts*



* Figures show percentage of total golf club sales accounted for by each type of shaft.



\$70.7 million and constituted 35.7% of total pro shop sales.



\$73.5 million and constituted 29.7% of total pro shop sales.

of total national pro shop sales, as compared to 17.3 per cent in 1968. Golf balls, a fast-moving item, moved up one notch to first place, accounting for 18.5 per cent of total national pro shop sales, versus 17.1 per cent in 1968. Men's apparel and women's apparel moved into third and fourth places, respectively, pushing woods back from third place in 1968 to fifth place in 1969. However, if all golf club categories are combined—irons, woods, putters and utility clubs—they constitute 29.7 per cent of total national pro shop sales in 1969, as compared to 35.7 per cent in 1968.

Pros were asked to break down their golf club sales by types of shafts. Overall response, combining pro shops at all types of courses, indicated almost an even split between conventional steel and aluminum shafts—49.7 per cent and 49.4 per cent of club sales respectively. Clubs with other types of shafts constituted only .9 per cent of the sales.

Pro income from golf lessons remained rather stable. Pros at private clubs had the greatest, but still a modest, gain, going from an average of \$2,500 in 1968 to \$2,800 in 1969. Public course

continued

Do You Earn Prize Money from Tournament Play?

Type of course	Yes	No
Private	55%	45%
Semi-private	31.9%	68.1%
Hotel/Resort	20%	80%
Public	33.3%	66.7%
Per cent of total response	41.2%	58.8%

Average Amount Won by Pros Who Earn Money from Tournament Play

Type of course	Average earned
Private	
1968	\$1,500
1969	\$1,400
Semi-private	
1968	\$2,500
1969	\$1,700
Hotel/Resort	
1968	\$1,100
1969	\$800
Public	
1968	\$1,200
1969	—*

* Insufficient response to derive valid average

PROFESSIONALS

continued

pros reported an average decrease of \$100 from \$1,600 in 1968 to \$1,500 in 1969. However, overall response, combining all course types, showed a 7.7 per cent increase in total national pro income from golf lessons.

Some 41.2 per cent of the pros responding indicated that they earn money from tournament play. (It should also be noted that some pros earn additional income through golf car rentals. See page 82.) Pros at semi-private clubs had the highest earnings averages from tournament play in both 1968 and 1969. □

Notes: This golf professional study does not include non-regu-

lation facilities (par-three, executive, etc.), since the number of such facilities with complete pro shop operations, handling all categories of merchandise and carrying out all functions covered here, are few. Therefore, when the article refers to pro shops at United States golf facilities or the nation's golf facilities, it should be understood that we mean pro shops at regulation golf facilities only.

The term "golf facility" itself refers to an entire golf establishment. Therefore, a club with two or more courses is considered to be one golf facility, since the courses are under the same management and share the same pro shop, clubhouse and other club facilities.

Not all regulation golf facilities have pro shops. Based on its own figures and those of the major

golf equipment manufacturers, GOLFDOM estimates that there are a total of 7,700 pro shops at regulation golf facilities. This figure, for purposes of giving national totals, has been broken down by type of course as follows: 3,230 private club pro shops; 2,402 semi-private club pro shops; 400 hotel/resort course pro shops, and 1,668 public course pro shops.

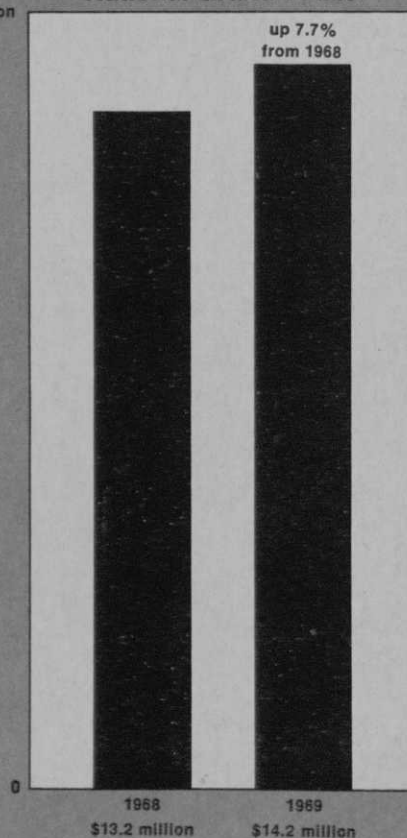
Figures in the millions have been rounded to the nearest hundred thousand dollars; figures in the thousands have been rounded to the nearest hundred dollars, and figures in the hundreds have been rounded to the nearest ten dollars. Therefore, rounded national totals, when added, may not precisely agree with the national grand totals, since these are the sums of the unrounded figures.

Pro Income from Golf Lessons

Type of Course	Average per facility	National totals
Private		
1968	\$2,500	\$8.1 million
1969	\$2,800	\$9.1 million
Semi-private		
1968	\$800	\$1.9 million
1969	\$850	\$2 million
Hotel/Resort		
1968	\$1,100	\$420,000
1969	\$1,100	\$440,000
Public		
1968	\$1,600	\$2.7 million
1969	\$1,500	\$2.6 million

Pro Income from Golf Lessons
National Grand Totals

\$15 million



Club Managers

... do a thriving business in food and liquor sales,
but 1970 budgets show that they are still struggling with sharp
increases in overhead and operating expenditures

Club managers are continually concerned about varied and interesting menus, unique party ideas and improved efficiency of dining facilities. And it's no wonder. Food and beverage service is big business at golf facilities throughout the nation and is becoming bigger year after year.

GOLFDOM's Second Annual Marketing and Research Study revealed that gross receipts from food sales in 1969 at the nation's regulation golf facilities totaled almost \$777 million, topping the 1968 total by close to \$32 million or 4.3 per cent. Of the four major types of golf facilities, the estimated 3,738 private clubs in the United States account for almost 67 per cent of the national grand total volume, with a total in food sales of \$520 million and an average per private facility of \$139,100 in 1969. Although public courses account for only 16 per

cent of the national total in food sales, because of the significantly smaller number of such courses, terms of average per facility, they were not a distant second, with \$105,600. Meanwhile, semi-private clubs and hotel/resort courses trailed behind in the average per facility breakdown, with \$34,300 and \$26,500 respectively. However, hotel/resort courses more than doubled their gross food receipts from 1968 to 1969—a more striking increase than the other course categories.

Perhaps some of the wide disparity on food sales between private and semi-private clubs may be accounted for by the greater number of private clubs which remain open year-round. More than 70 per cent of the respondents in the private category said their clubs were open year-round, whereas little more than 45 per cent of the managers of semi-private

facilities said they were open year-round. However, by looking at food sales in terms of season, the average for public courses becomes even more amazing, since only 41 per cent of the respondents in this category said they remained open all year.

The grand total for liquor sales (hard liquor, wines, beer) at golf facilities throughout the country increased 7.8 per cent in 1969 to \$417.5 million. And the national total of liquor purchase budgets for 1970 was found to be 10.8 per cent higher than the budgets for 1969.

Despite bad summer weather over much of the nation last year, revenue from green fees in 1969 topped the 1968 total by approximately \$21.5 million for a total of almost \$304.5 million—a 7.6 per cent increase. As would be expected, green fees at semi-private

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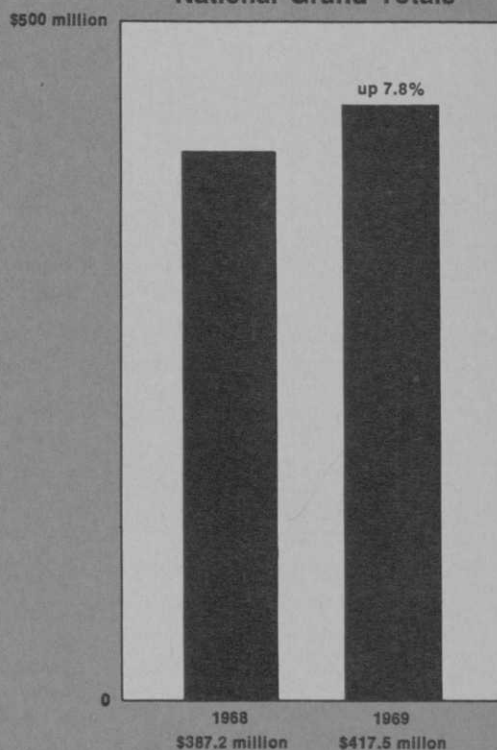
See page 68 for explanatory notes on tables and graphs.

Gross Receipts from Liquor* Sales

Course type	Average per facility	National totals
Private		
1968	\$74,000	\$276.6 million
1969	\$79,100	\$295.8 million
Semi-private		
1968	\$18,800	\$67.3 million
1969	\$23,400	\$83.6 million
Hotel/Resort		
1968	\$3,300	\$1.3 million
1969	\$4,000	\$1.6 million
Public		
1968	\$35,800	\$41.9 million
1969	\$31,200	\$36.5 million

* Includes hard liquor, wines and beer

Gross Receipts from Liquor* Sales National Grand Totals

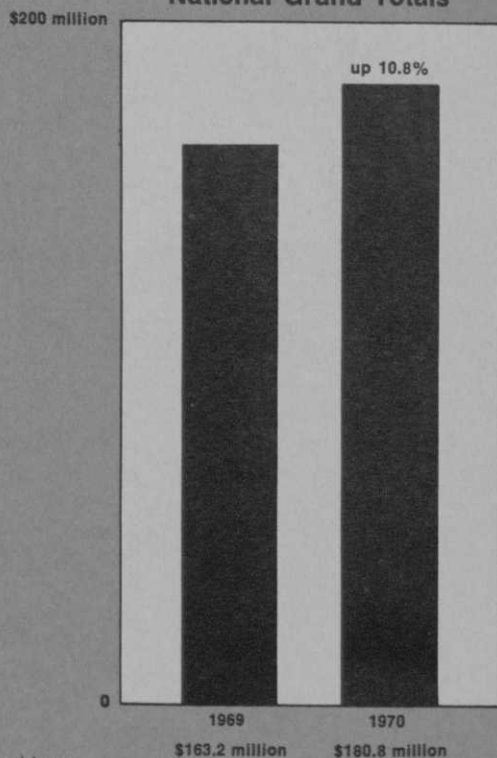


Liquor* Purchase Budgets

Course type	Average per facility	National totals
Private		
Budget 1969	\$27,400	\$102.5 million
Budget 1970	\$29,400	\$110 million
Semi-private		
Budget 1969	\$9,300	\$33 million
Budget 1970	\$9,700	\$34.6 million
Hotel/Resort		
Budget 1969	\$1,800	\$700,000
Budget 1970	\$2,800	\$1.1 million
Public		
Budget 1969	\$23,000	\$26.9 million
Budget 1970	\$30,000	\$35.1 million

* Includes hard liquor, wines and beer

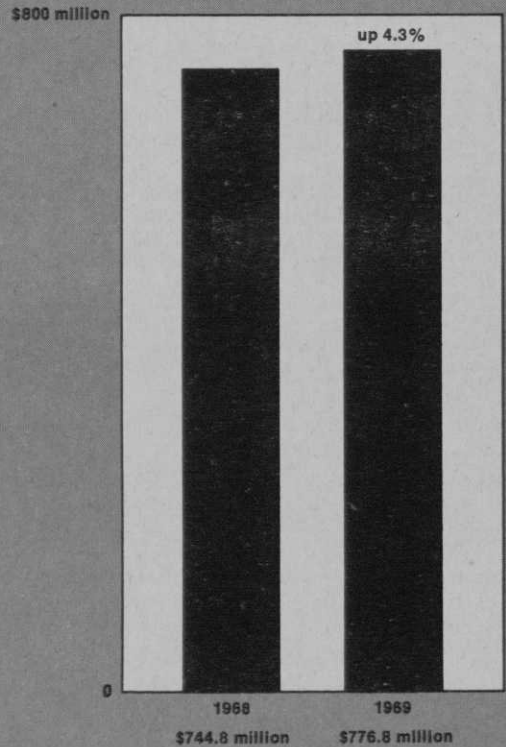
Liquor* Purchase Budgets National Grand Totals



Gross Receipts from Food Sales

Course type	Average per facility	National totals
Private		
1968	\$136,000	\$508.3 million
1969	\$139,100	\$519.8 million
Semi-private		
1968	\$32,000	\$114.7 million
1969	\$34,300	\$122.7 million
Hotel/Resort		
1968	\$13,000	\$5.2 million
1969	\$26,500	\$10.6 million
Public		
1968	\$99,600	\$116.6 million
1969	\$105,600	\$123.7 million

**Gross Receipts from Food Sales
National Grand Totals**



Food Purchase Budgets

Course type	Average per facility	National totals
Private		
Budget 1969	\$51,700	\$193.2 million
Budget 1970	\$78,000	\$291.4 million
Semi-private		
Budget 1969	\$8,000	\$28.8 million
Budget 1970	\$15,700	\$56.3 million
Hotel/Resort		
Budget 1969	\$10,500	\$4.2 million
Budget 1970	\$8,000	\$3.2 million
Public		
Budget 1969	—*	—*
Budget 1970	\$17,300	\$20.2 million

Food Purchase Budget 1970

National Grand Total \$371.1 million

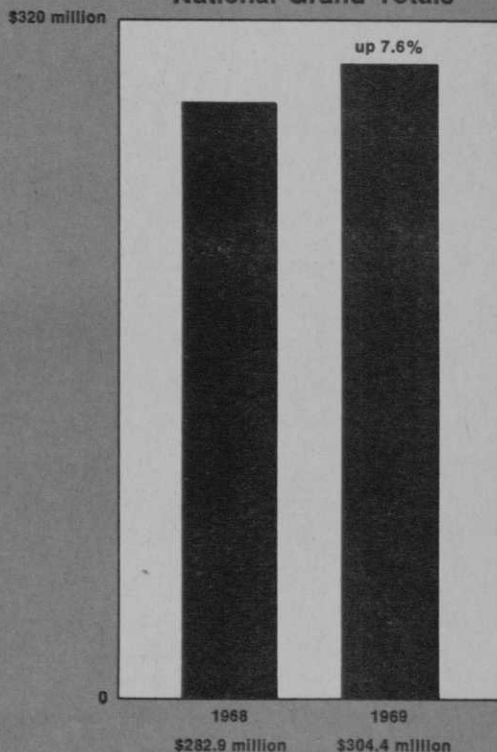
* Insufficient response on public course food budgets for 1969 precludes giving comparative grand totals for 1969 and 1970.

Revenue from Green Fees

Course type	Average per facility	National totals
Private*		
1968	\$14,400	\$54 million
1969	\$15,000	\$56.1 million
Semi-private		
1968	\$38,900	\$139.4 million
1969	\$42,600	\$152.5 million
Hotel/Resort		
1968	\$37,500	\$15 million
1969	\$39,500	\$15.8 million
Public		
1968	\$63,600	\$74.5 million
1969	\$68,300	\$80 million

* The figures noted for private courses would generally constitute guest fees.

Revenue from Green Fees National Grand Totals



CLUB MANAGERS

continued

clubs accounted for more than 50 per cent of this total, because there are more than twice as many such facilities as public courses and because of the generally higher green fees at semi-private clubs than at public courses. However, in terms of average per facility, public courses were far ahead, with \$68,300, as compared with \$42,600 per semi-private club. Obviously the enormous traffic over public courses accounts for this difference. An average of 7,500 nine-hole rounds and 13,000 18-hole rounds were played at the nation's semi-private clubs, whereas an average of 20,500 nine-hole rounds and 27,700 18-hole rounds were played on the public courses.

Average total revenue from

green fees at hotel/resort courses was directly behind the semi-private figures, with \$39,500 per facility. However, hotel/resort courses do not account for any significant percentage of the national total revenue from green fees because of the small number of such courses.

Private clubs reported an average green fees revenue of \$15,000, which generally would be guest fees. This seemingly small figure when projected nationally, however, totals more than \$56 million. It should be noted that many facilities make additional revenue from golf car rentals. See page 80.)

On the outgoing side of the financial account the national total for operating expenditures in 1969 showed an increase over 1968 of approximately \$20 million to almost \$818.6 million. This figure covers expenditures

for club rooms' maintenance, entertainment, administrative and general expenses, heat, light, power, general repairs, and maintenance, but excludes payroll and pro shop costs. Of the four types of courses, the private club was the only one which recorded a slight decrease in operating expenditures, dropping from an average of \$161,700 per facility in 1968 to \$152,500 in 1969. Operating expenditures at semi-private clubs had the sharpest rise, from an average per facility of \$42,400 in 1968 to \$56,300 in 1969.

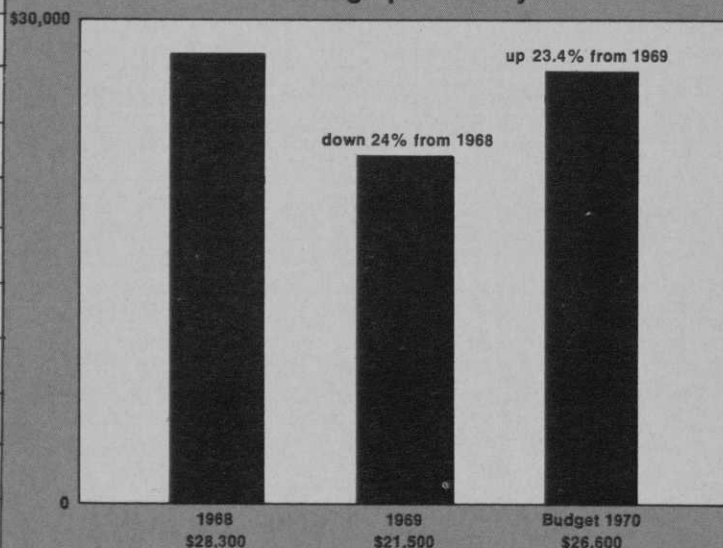
All golf facilities, with the exception of semi-private clubs, are budgeted for high operating expenditures in 1970. Nationally, some \$980.6 million are pegged for these expenses in 1969—almost 20 per cent more than was spent in 1968.

continued

Operating Expenditures*

Course type	Average per facility	National totals
Private		
1968	\$161,700	\$604.4 million
1969	\$152,500	\$570.1 million
Budget 1970	\$195,800	\$732 million
Semi-private		
1968	\$42,400	\$152 million
1969	\$56,300	\$201.6 million
Budget 1970	\$54,600	\$195.5 million
Hotel/Resort		
1968	\$11,600	\$4.6 million
1969	\$13,900	\$5.6 million
Budget 1970	\$20,400	\$8.2 million
Public		
1968	\$32,000	\$37.5 million
1969	\$35,300	\$41.3 million
Budget 1970	\$38,400	\$44.9 million

**Expenditures for Clubhouse Improvements
Average per Facility***

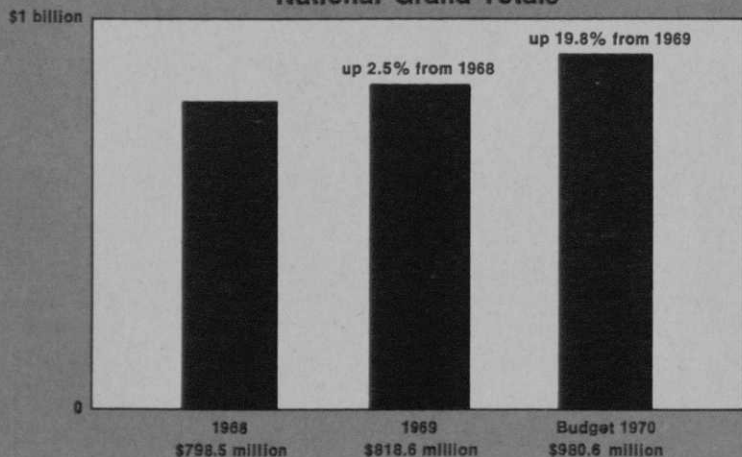


*Averages encompass all four types of regulation facilities—private, semi-private, hotel/resort and public.

National Grand Totals:

1968	\$251.8 million
1969	\$191.5 million
Budget 1970	\$236.4 million

**Operating Expenditures*
National Grand Totals**



*Includes club rooms' maintenance, entertainment, administrative and general expenses, heat, light, power and general repairs and maintenance. Excludes payroll and pro shop costs.

CLUB MANAGERS

continued

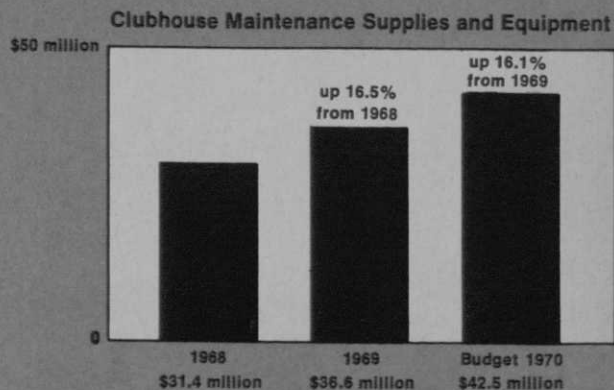
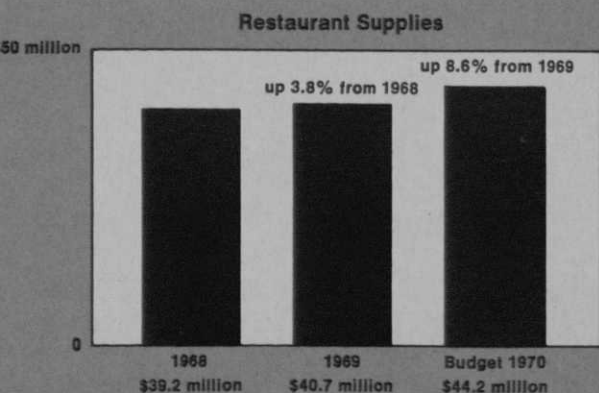
Tight money seemed to affect major clubhouse improvements in 1969 at the majority of golf facilities in the United States. Money spent on major improvements showed more than a 24 per cent decrease from an average per facility of \$28,300 in 1968 to \$21,500 in 1969. This drop primarily was accounted for by private and semi-private clubs. However, golf facilities apparently will not hold back on clubhouse improvements in 1970. Some \$26,600 per facility are slated for major improvements this year.

In two categories of clubhouse
continued

Expenditures for Equipment and Supplies

Course type	Restaurant supplies (china, silver, linen, etc.)		Clubhouse maintenance supplies and equipment	
	Average per facility	National totals	Average per facility	National totals
Private				
1968	\$8,700	\$32.6 million	\$7,100	\$26.6 million
1969	\$9,100	\$33.9 million	\$8,000	\$30.1 million
Budget 1970	\$10,100	\$37.7 million	\$9,900	\$36.8 million
Semi-private				
1968	\$1,300	\$4.7 million	\$880	\$3.1 million
1969	\$1,100	\$4 million	\$1,400	\$4.9 million
Budget 1970	\$1,100	\$3.8 million	\$980	\$3.5 million
Hotel/Resort				
1968	\$530	\$210,000	\$480	\$192,000
1969	\$1,200	\$480,000	\$870	\$349,000
Budget 1970	\$900	\$360,000	\$930	\$370,000
Public				
1968	\$1,500	\$1.8 million	\$1,200	\$1.4 million
1969	\$2,000	\$2.3 million	\$1,100	\$1.2 million
Budget 1970	\$2,000	\$2.3 million	\$1,500	\$1.8 million

Expenditures for Equipment and Supplies National Grand Totals



CLUB MANAGERS

continued

expenditures—restaurant supplies (china, linen, silver, etc.) and clubhouse maintenance equipment and supplies—a marked increase in national totals is evident from 1968 right to the budgets for 1970. Nationally, regulation golf facilities spent more than \$40.7 million on restaurant supplies in 1969—a \$1.5 million or 3.8 per cent increase over 1968. And in 1970, managers have pegged \$44.2 million for these supplies. Money spent on clubhouse maintenance equipment and supplies showed an even greater rise of \$5.2 million or 16.5 per cent over the 1968 total to more than \$36.6 million in 1969. And budgets for 1970 indicate that managers are planning for expenditures on clubhouse maintenance equipment and supplies that would bring the national total to almost \$42.5 million—more than a 16 per cent increase over 1969.

It is easy to understand the enormous amounts of money expended for maintenance when examining the figures on investments in clubhouse appointments—kitchen equipment; clubhouse furniture; carpets, drapes and

other accessories or furnishings. Breakdown by type of course on actual current replacement value of kitchen equipment averaged out to \$43,500 per private club, \$22,000 per semi-private club, \$4,000 per hotel/resort course, and \$25,000 per public course.

A similar breakdown for replacement value on clubhouse furniture indicated an average of \$60,500 per private club, \$10,500 per semi-private club, \$5,300 per hotel/resort course, and \$5,900 per public course.

Average replacement value on carpet, drapes and other furnishings combined are \$25,500 per private club, \$5,900 per semi-private club, \$5,500 per hotel/resort course, and \$8,300 per public course.

Totaling the national projections the three categories of clubhouse equipment and appointments reveal a staggering sum of almost \$673.6 million. □

Notes: This club manager study does not include non-regulation courses (par-three, executive, etc.), since the number of such courses with complete dining and clubhouse facilities are few. Therefore, when the terms "United States golf facilities" and "nation's golf facilities" are used,

it should be understood that we are referring to regulation golf facilities only.

The term "golf facility" itself refers to an entire golf establishment. Therefore, a club with two or more courses is considered to be one golf facility, since the courses are under the same management and share the same clubhouse, pro shop and other club facilities. All figures given reflect this definition.

"Hotel/resort" course refers only to golf facilities which are owned and operated by a resort hotel.

National totals by type of course are based on the following breakdown of the total 8,890 regulation golf facilities in the United States: private, 3,738; semi-private, 3,581; Hotel/resort, 400; public, 1,171.

Figures in the millions have been rounded to the nearest hundred thousand dollars; figures in the thousands have been rounded to the nearest hundred dollars, and figures in the hundreds have been rounded to the nearest ten dollars. Therefore, rounded national totals, when added, may not precisely agree with the national grand totals, since these are the sums of unrounded figures.

Evaluation of Clubhouse Equipment and Appointments
(Actual current replacement values)

Course type	Kitchen equipment		Furniture		Carpets, drapes, other appointments	
	Average per facility	National totals	Average per facility	National totals	Average per facility	National totals
Private	\$43,500	\$162.4 million	\$60,500	\$226.2 million	\$25,500	\$95.4 million
Semi-private	\$22,000	\$79 million	\$10,500	\$37.7 million	\$5,900	\$21.1 million
Hotel/Resort	\$4,000	\$1.6 million	\$5,300	\$2.1 million	\$5,500	\$2.2 million
Public	\$25,000	\$29.3 million	\$5,900	\$6.9 million	\$8,300	\$9.7 million
National grand totals		\$272.3 million		\$272.9 million		\$128.4 million

1970: The Year of the Golf Car

The number of golf cars continues to rise, with even sharper increases predicted for next year

By anybody's calendar 1970 is going to be a big year for the golf car industry in the United States. Respondents to GOLFDOM's Marketing and Research surveys indicated that the average size fleet at facilities renting golf cars had climbed from 23 cars in 1968

to 27 cars in 1969—a 17.4 per cent increase. And the average will jump another 18.5 per cent by year-end 1970 to 32 cars.

Projecting these figures to the 7,618 regulation courses renting golf cars (85.7 per cent of all regulation facilities), this means an in-

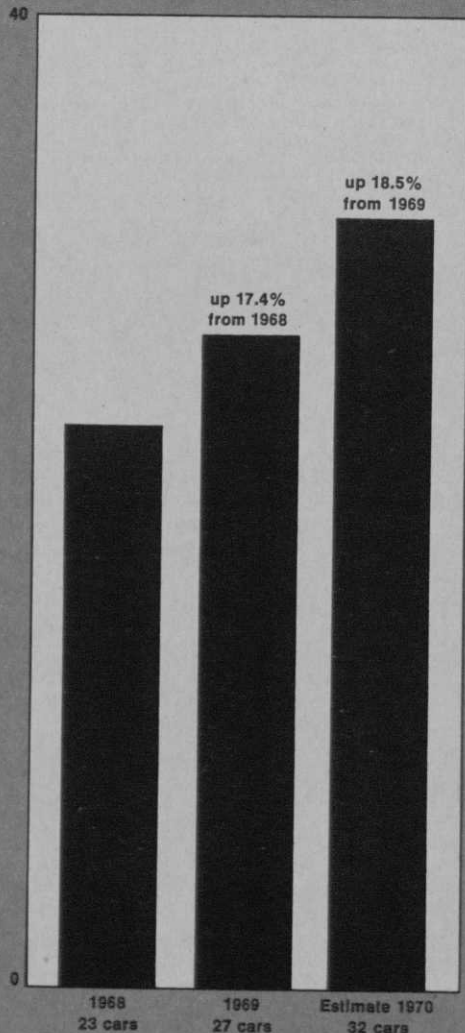
crease from 205,700 golf cars in 1969 to 243,800 in 1970. Some 63.5 per cent of the respondents indicated that their courses are planning additions to present golf car fleets. And of those who had such plans, 79.2 per cent said the additions were scheduled for be-

Average Sizes of Golf Car Fleets

Type of course	Average per facility*
Private	
1968	27
1969	32
Estimate 1970	36
Semi-private	
1968	17
1969	17
Estimate 1970	25
Hotel/Resort	
1968	27
1969	38
Estimate 1970	40
Public	
1968	13
1969	15
Estimate 1970	17

* Variance from the average in the case of an individual fleet could be accounted for by two factors: number of holes and size of the membership or amount of player traffic.

Overall Average Size of Golf Car Fleets



tween the latter part of 1969 and the end of 1970.

However, these growth figures do not even include a substantial number of cars that may be purchased or leased in 1970 by facilities which presently do not have fleets. In fact, the study showed

that of the respondents who said their courses did not have fleets, some 42.5 per cent indicated that their facilities have plans to acquire golf cars in the near future.

A look at revenues derived from golf car rentals at golf facilities offers a prime reason for the growth

of fleets. The overall national totals for revenue from golf car rentals jumped 13.3 per cent from \$126.2 million in 1968 to \$143 million in 1969. Hotel/resort facilities led the way, with an average revenue of \$32,800 in 1968

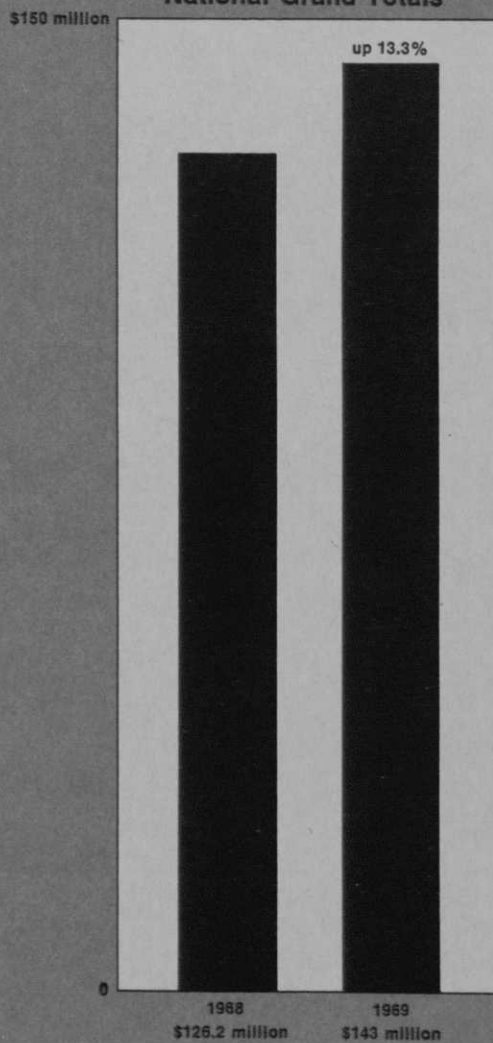
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Average Gross Revenue from Golf Car Rentals*

Type of course	Average per facility
Private	
1968	\$18,500
1969	\$20,300
Semi-private	
1968	\$13,600
1969	\$14,700
Hotel/Resort	
1968	\$32,800
1969	\$42,500
Public	
1968	\$12,500
1969	\$14,900
Overall response	
1968	\$17,500
1969	\$19,900

* Before any division of revenue

Gross Revenue from Golf Car Rentals National Grand Totals*



Percentage of Gross Golf Car Revenue Retained by Pros Who Participate*

Type of course	Retain 100% of revenue	Retain 75%-99% of revenue	Retain 50%-74% of revenue	Retain 25%-49% of revenue	Retain under 25% of revenue
Private	50%	2.1%	6.3%	8.3%	33.3%
Semi-private	58.9%	5.1%	10.3%	10.3%	15.4%
Hotel/Resort	62.5%	0%	0%	12.5%	25%
Public	20%	20%	20%	20%	20%
Overall response	53%	4%	8%	10%	25%

* Figures entered indicate percentage of respondents for each course type.

GOLF CAR

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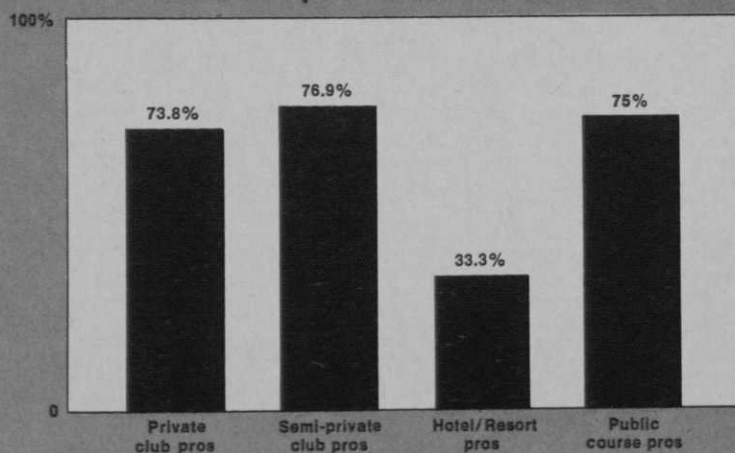
and \$42,500 in 1969.

Pros were asked if they retain any of the revenue from golf cars. Overall, some 60.5 per cent said they did. However, a breakdown of responses by course type showed that far fewer pros at hotel/resort courses participate in golf car revenue than those at any of the three other types of golf facilities.

Some pro incomes obviously are getting a considerable boost from golf car rentals. Overall, 53 per cent of the respondents who participate in the revenue indicated that they retain 100 per cent of the sum at their facilities. (Generally, any division of revenue from golf car rentals would be between the pro and the club.)

Ironically, although fewer hotel/resort pros said they participate in revenue from golf car rentals, of those who do participate, some 62.5 per cent indicated that they retain 100 per cent of the sum. □

Percentage of Pro Respondents Who Participate in Golf Car Revenue*



Overall percentage who participate in golf car revenue = 60.5%

* Figures pertain to those pros at facilities renting golf cars

Golf Car Statistics

- 85.7% of the survey respondents indicated their golf facilities have golf car fleets.
- Projecting nationally, 85.7% of the 8,890 regulation golf facilities in the United States equals an estimated 7,618 facilities, which have golf car fleets.
- The estimated 7,618 golf car fleets had an average of 27 golf cars by the end of 1969. Therefore, this would constitute a rounded total of 205,700 golf cars at regulation facilities in the United States in 1969, as compared with 175,200 in 1968.
- Based on the 1970 estimate of 32 golf cars per fleet, the same 7,618 facilities will have a total of 243,800 golf cars by the end of 1970.
- The number of facilities with golf cars will increase substantially. Of those respondents who indicated their courses did not have golf car fleets, 42.5% said they planned to acquire golf cars in the near future.