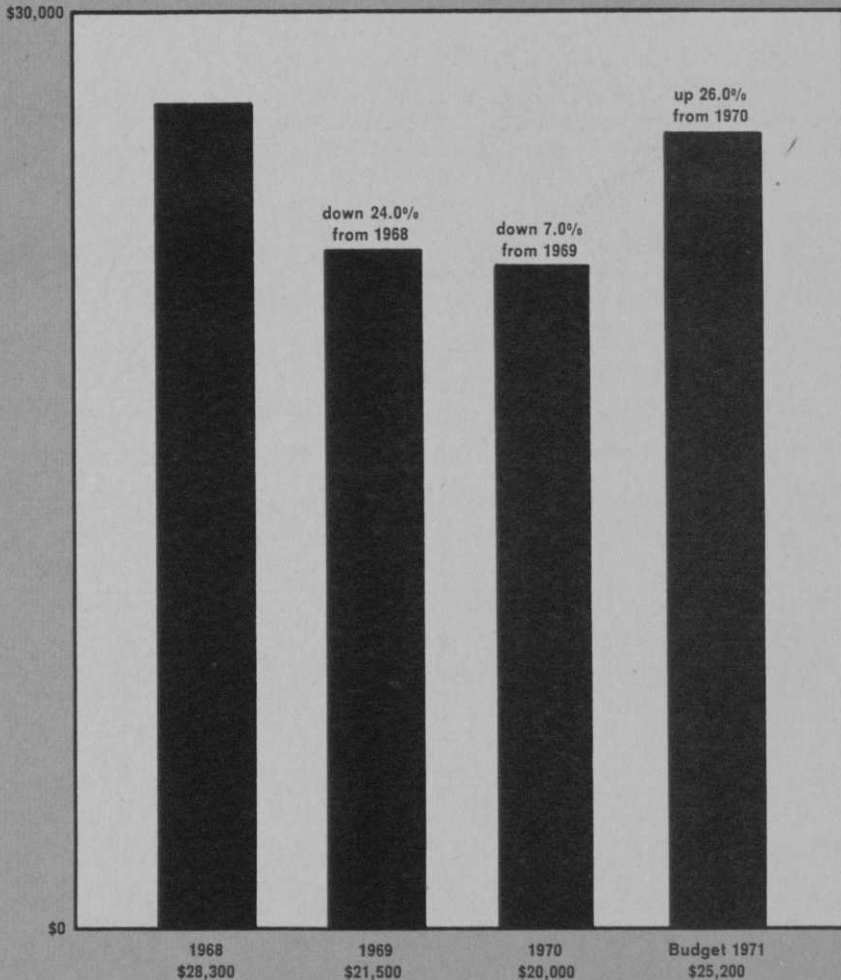
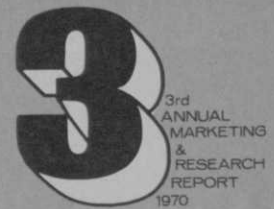


Expenditures for Clubhouse Improvements Average per Facility*



National Grand Totals:

1968	\$251.8 million
1969	\$191.5 million
1970	\$181.9 million
Budget 1971	\$228.7 million



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

Evaluation of Clubhouse Equipment and Appointments (Actual Current Replacement Values)

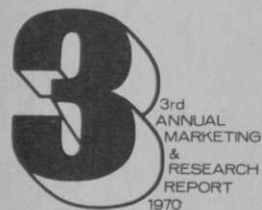
Course type	Kitchen Equipment		Furniture		Carpet, drapes, other appointments	
	Average per facility	National totals	Average per facility	National totals	Average per facility	National totals
Private	\$52,400	\$207.2 million	\$64,400	\$254.6 million	\$33,300	\$131.7 million
Semi-private	\$12,600	\$ 44.3 million	\$ 9,200	\$ 32.5 million	\$ 6,700	\$ 23.8 million
Hotel/Resort	\$21,700	\$ 8.7 million	\$26,100	\$ 10.4 million	\$10,400	\$ 4.1 million
Public	\$ 7,500	\$ 9 million	\$ 3,200	\$ 3.9 million	\$ 2,300	\$ 2.7 million
National grand totals		\$269.2 million		\$301.4 million		\$162.3 million

(Continued)

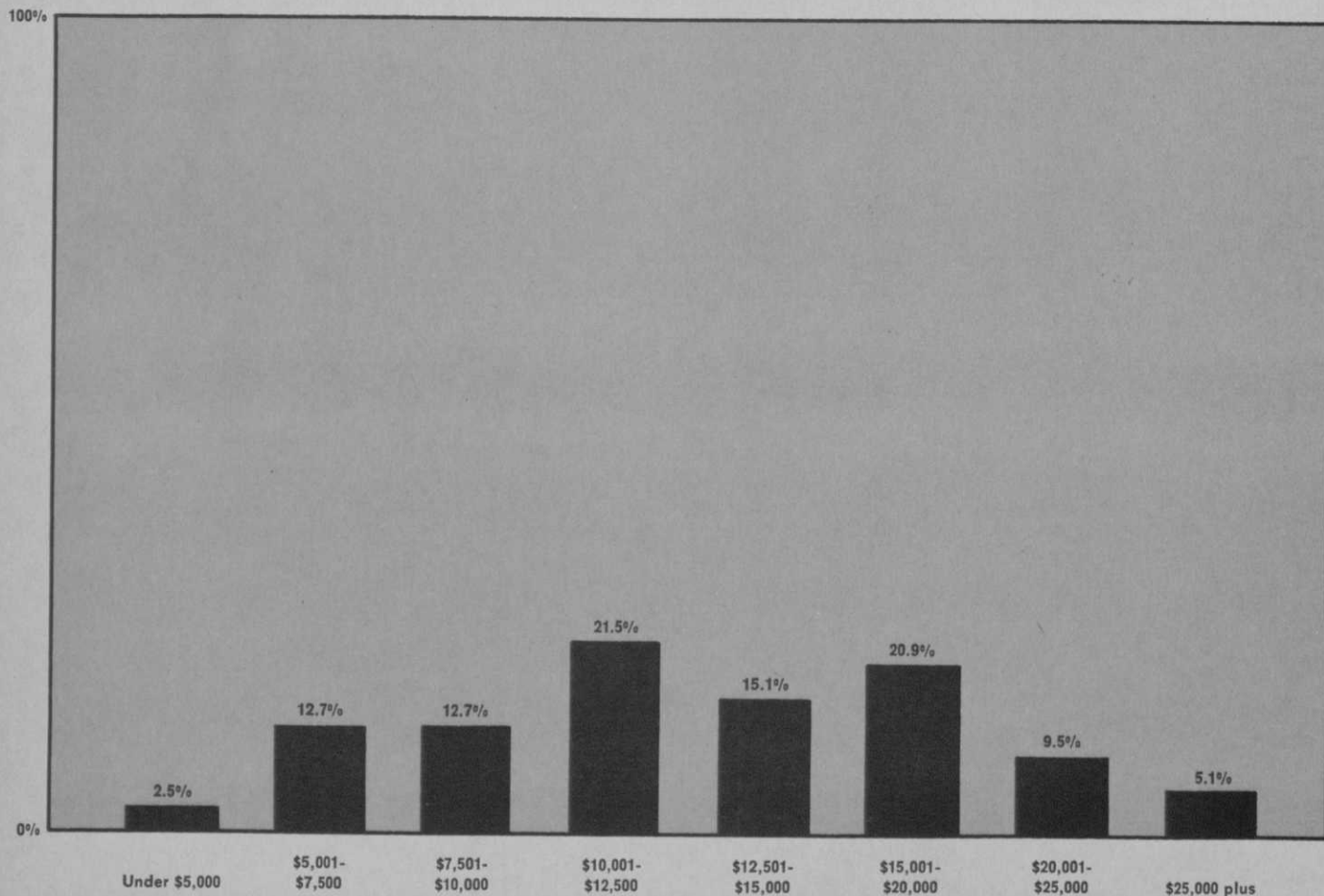
**Annual Managers' Salaries in 1970
(Per Cent of Responses in each Course Type)**

Salary ranges	Private	Semi-private	Hotel/Resort	Public
Under \$5,000	2.1%	2.1%	—*	16.7%
\$5,001-\$7,500	11.6%	12.8%	10.0%	33.3%
\$7,501-\$10,000	7.4%	21.3%	20.0%	16.7%
\$10,001-\$12,500	16.8%	31.9%	10.0%	33.3%
\$12,501-\$15,000	17.9%	14.9%	—*	—*
\$15,001-\$20,000	27.4%	10.6%	20.0%	—*
\$20,001-\$25,000	10.5%	6.4%	20.0%	—*
\$25,000 plus	6.3%	—*	20.0%	—*

*No response in these categories.



**Managers' Salaries
(Per Cent of Response,
All Course Types Combined)**





Wherever golf is played . . .

When repositioning the greens cup—Use the Par Aide Hole Cutter, Hole Cutter Guide, Cup Setter and Cup Puller to assure you of a clean and true hole. Hole Cutters available with foot or lever action ejection. Rule signs are double faced aluminum casting—11" diameter with 2" high letters with buffed aluminum face and flat black background.



FOR COMPLETE LINE OF PAR AIDE GREENS
AND TEES EQUIPMENT—WRITE FOR CATALOG

PAR AIDE PRODUCTS COMPANY
296 NORTH PASCAL STREET • ST. PAUL, MINN. 55104

PROFESSIONALS

... were unable to overcome the general economic slump in 1970 and recorded a drop in sales in nearly all merchandise categories

3rd ANNUAL MARKETING & RESEARCH REPORT 1970

Pro shop sales unfortunately ran true to form with other economic indicators in 1970. With only a single exception, total pro shop sales in each product category fell below 1969 tallies. GOLFDOM's Third Annual Marketing and Research Study showed that total gross sales at the nation's estimated 8,000 pro shops dropped 18.1 per cent, from \$246.4 million in 1969 to \$201.8 million in 1970.

A look at the national grand total for sales in each product category reveals declines ranging from a sparse .2 per cent to a hefty 67 per cent. Among the categories that took the biggest dips were novelties and gadgets, men's apparel, golf shoes, golf bags and headcovers. Only golf gloves defied the trend and realized an over-all increase in sales. Irons fared the best in the major equipment categories, dropping only 7 per cent to \$33.2 million. Combining sales of all golf club categories (irons, woods, putters and utility clubs), the study revealed a 13.2 per cent drop to \$62.7 million in 1970.

Comparing 1969 and 1970 dollar volumes in terms of each product category's contribution to total pro shop sales, rankings in general remained the same. This finding bears out earlier informal reports from golf professionals who complained of a reluctance to buy across the merchandise board. In a similar comparison last year of 1968 and 1969, there had been significant re-shuffling among the leading dollar volume categories due to golfers' holding back on major purchases of new equipment in the summer of 1969. But 1970's figures show that golfers were squeamish about all purchases—large or small. The top

categories remained, respectively, golf balls, irons, men's apparel, women's apparel, woods and golf shoes.

Delving into golf club sales more specifically, golf professionals were asked to break down sales by types of shafts. The results showed that the industry's active promotion of lightweight steel in 1970 did pay off. Lightweight steel led in the materials mix, and aluminum, conventional steel and stainless steel followed in respective order. Of course, availability from only two manufacturers would have a considerable influence on the market in the case of stainless steel shafts.

Golf professionals could not even take heart from business in golf lessons. Good weather apparently was unable to overcome the economic climate in 1970, and total income from golf lessons dropped 12.7 per cent from 1969.

For the first time, GOLFDOM asked professionals to estimate their net incomes, deducting all costs, payroll items and other operational expenditures. In a breakdown by course type, professionals at public facilities fared poorly; the overwhelming majority reported incomes below GOLFDOM's midpoint category of \$12,501. More professionals at private clubs reported incomes above this midpoint than those in any other course type. Combining responses from professionals at all course types, the percentages of respondents for the six income ranges between "under \$5,000" and "\$15,001-\$20,000" came up relatively close to each other. However, a sharp drop appears for the two highest ranges—" \$20,001-\$25,000" and "\$25,000 plus." □

Professionals' Tables and Graphs

Professionals net income (each course type)	65	Over-all response	69
Professionals net income (all course types)	65	Income from tournament play	69
Gross pro shop sales		Average amount won from tournament play	69
Averages and national totals	66,67	Income from club cleaning and storage	
National grand totals 1968, 1969, 1970	68,69	Average and national totals	69
Income from golf lessons		National grand totals	69
Average and national totals	68	Income from driving ranges	
National grand totals	68	Average and national totals	69
Golf club sales by shaft types	69	National grand totals	69

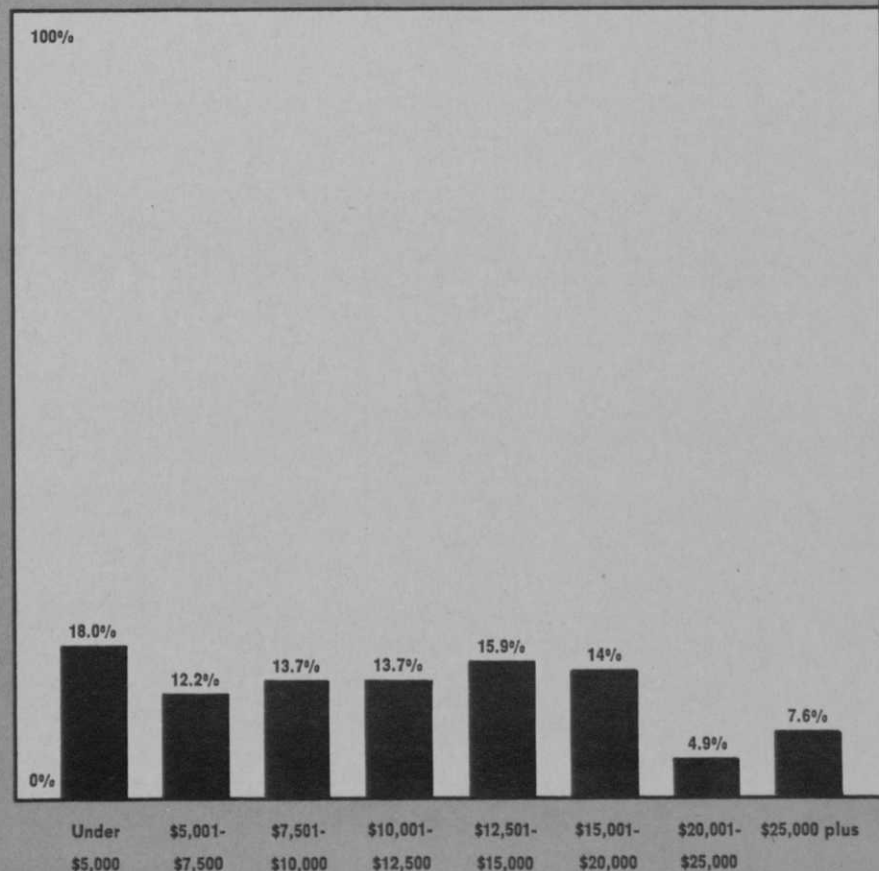
Estimate of Net Pro Income for 1970*
(Per Cent of Responses in Each Course Type)

Salary ranges	Private	Semi-private	Hotel/Resort	Public
Under \$5,000	13.3%	21.7%	26.1%	33.3%
\$5,001-\$7,500	11.6%	10.8%	13.0%	33.3%
\$7,501-\$10,000	12.7%	17.5%	4.3%	8.4%
\$10,001-\$12,500	11.6%	15.8%	21.7%	8.4%
\$12,501-\$15,000	19.1%	12.5%	17.5%	—**
\$15,001-\$20,000	17.9%	10.0%	4.3%	16.6%
\$20,001-\$25,000	5.8%	4.2%	4.3%	—**
\$25,000 plus	8.0%	7.5%	8.8%	—**

*After cost, payroll and other operation expenses.

**No response in these categories.

Pro Net Income for 1970
(Per Cent of Response, All Course Types Combined)



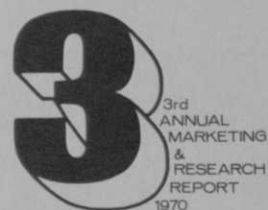
Notes: This golf professional study does not include non-regulation facilities (par-three, executive, etc.) because the number of such facilities with complete pro shop operations, handling all categories of merchandise and carrying out all functions covered here, are few. Therefore, when the article 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 refers to an entire golf establishment. Therefore, a club with two or more courses is considered to be one golf facility, because 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 8,000 pro shops at regulation golf facilities. This figure, for purposes of giving national totals, has been broken down by type of course as follows: private club pro shops; semi-private club pro shops; hotel/resort course pro shops, and public course pro shops.

For purposes of the survey, GOLFDOM has defined semi-private as a private, daily fee facility; hotel/resort as a facility owned and operated by a hotel or resort, and public as a municipal course or any other facility that does not represent private interests.

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, because these are the sums of the unrounded figures.



(Continued)

Gross Pro Shop Sales

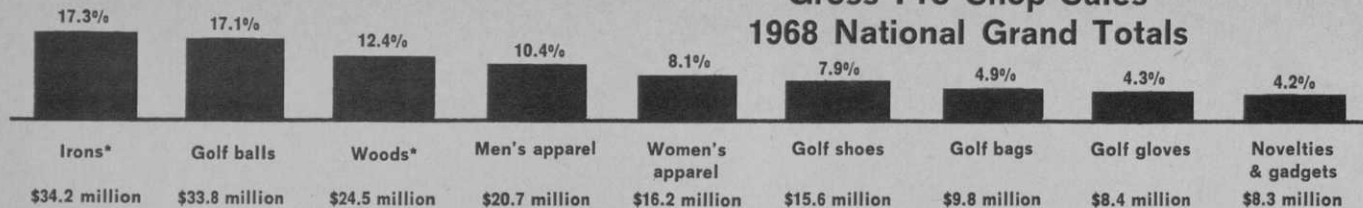
Type of course	Irons		Woods		Putters	
	Average per facility	National totals	Average per facility	National totals	Average per facility	National totals
Private						
1968	\$4,500	\$14.4 million	\$3,800	\$12.2 million	\$1,300	\$4.2 million
1969	\$5,700	\$18.3 million	\$4,000	\$12.8 million	\$930	\$3 million
1970	\$4,900	\$16.7 million	\$3,300	\$11.1 million	\$650	\$2.2 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
1970	\$3,600	\$8.8 million	\$2,000	\$4.9 million	\$500	\$1.2 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
1970	\$1,800	\$732,800	\$1,200	\$461,600	\$530	\$213,200
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
1970	\$4,100	\$6.9 million	\$2,900	\$5 million	\$590	\$1 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
1970	\$1,900	\$6.4 million	\$4,000	\$13.6 million	\$4,000	\$13.6 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
1970	\$1,100	\$2.6 million	\$1,600	\$4 million	\$2,000	\$4.8 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
1970	\$1,300	\$509,200	\$5,900	\$2.4 million	\$6,700	\$2.7 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
1970	\$2,200	\$3.8 million	\$610	\$1 million	\$320	\$536,300

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
\$470	\$1.6 million	\$1,500	\$5 million	\$360	\$1.2 million	\$6,500	\$22.2 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
\$330	\$808,300	\$1,000	\$2.6 million	\$210	\$517,300	\$4,600	\$11.4 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
\$190	\$74,000	\$600	\$241,600	\$160	\$65,600	\$7,700	\$3.1 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
\$490	\$823,000	\$1,000	\$1.8 million	\$260	\$448,000	\$5,200	\$8.9 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		
\$1,600	\$5.5 million	\$600	\$2 million	\$2,300	\$7.7 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		
\$1,100	\$2.8 million	\$300	\$746,100	\$860	\$2.1 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		
\$1,800	\$731,600	\$320	\$126,400	\$610	\$243,200		
\$690	\$1.1 million	\$260	\$437,000	\$220	\$362,000		
\$1,000	\$1.7 million	\$540	\$894,000	\$490	\$815,700		
\$1,400	\$2.4 million	\$300	\$500,600	\$480	\$806,100		

(Continued)

100%=\$198 million

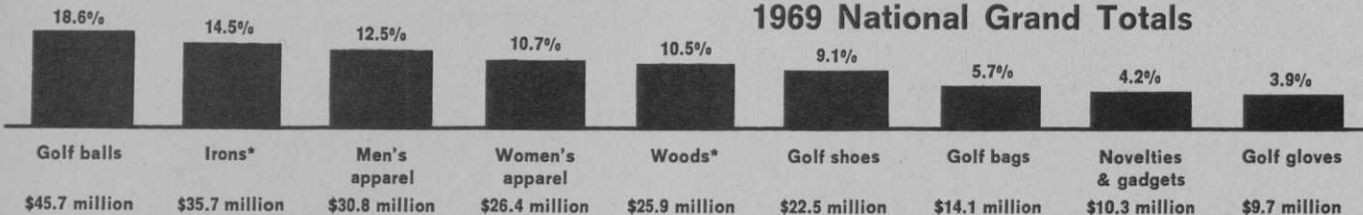
Gross Pro Shop Sales 1968 National Grand Totals



*Sales of the four golf club categories combined totaled \$70.7 million and constituted 35.7% of total pro shop sales.

100%=\$246.4 million (up 24.4% from 1968)

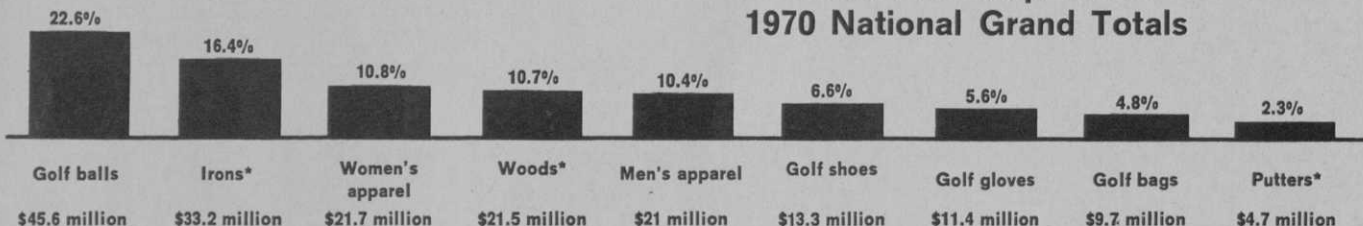
Gross Pro Shop Sales 1969 National Grand Totals



*Sales of the four golf club categories combined totaled \$72.2 million and constituted 29.3% of total pro shop sales.

100%=\$201.8 million (down 18.1% from 1969)

Gross Pro Shop Sales 1970 National Grand Totals

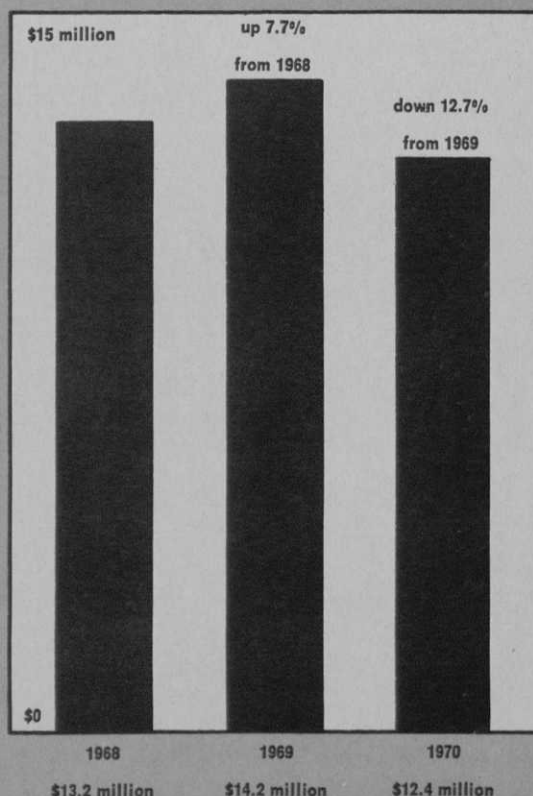


*Sales of the four golf club categories combined totaled \$62.7 million and constituted 31.7% of total pro shop sales.

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
1970	\$1,900	\$6.6 million
Semi-private		
1968	\$ 800	\$1.9 million
1969	\$ 850	\$2 million
1970	\$1,300	\$3.2 million
Hotel/Resort		
1968	\$1,100	\$420,000
1969	\$1,100	\$440,000
1970	\$1,100	\$446,800
Public		
1968	\$1,600	\$2.7 million
1969	\$1,500	\$2.6 million
1970	\$1,300	\$2.2 million

Pro Income from Golf Lessons National Grand Totals



Pro Income from Club Cleaning and Storage Service in 1970*

Type of course	Average per facility	National totals
Private	\$5,300	\$18.1 million
Semi-private	\$1,200	\$ 3.1 million
Hotel/Resort	\$ 980	\$392,000
National Grand Total		\$21.6 million

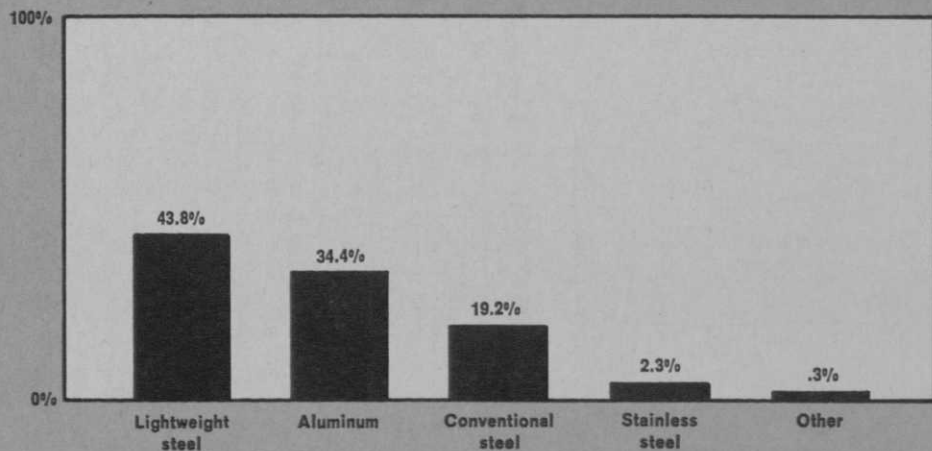
*Public courses have been excluded because most are not involved in this type of service.

Pro Income from Driving Ranges in 1970*

Type of course	Average per facility	National totals
Private	\$3,400	\$ 6.4 million
Semi-private	\$7,100	\$ 7.2 million
Hotel/Resort	\$6,800	\$ 1.7 million
Public	\$6,800	\$ 3.8 million
National Grand Total		\$19.2 million

*Figures represent the total number of such courses factored by the percentage which have a driving range.

National Golf Club Sales by Types of Shafts



1970 Golf Club Sales by Types of Shafts

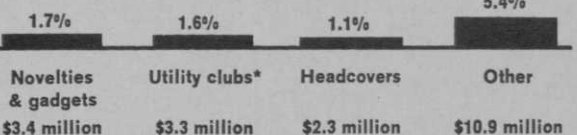
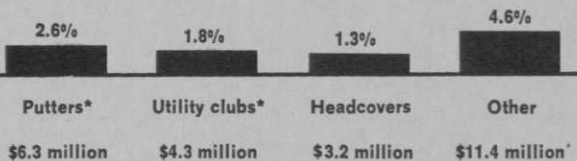
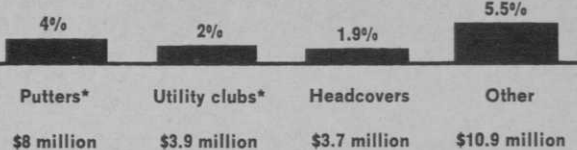
Type of course	Conventional steel	Lightweight steel	Stainless steel	Aluminum	Other
Private	12.0%	48.8%	2.2%	36.6%	.4%
Semi-private	30.8%	35.4%	2.6%	31.1%	.1%
Hotel/Resort	41.9%	37.0%	.9%	20.0%	.2%
Public	32.7%	30.7%	2.5%	34.0%	.1%

Do You Earn Prize Money from Tournament Play?

Type of course	Yes	No
Private	60.0%	40.0%
Semi-private	41.6%	58.4%
Hotel/Resort	40.0%	60.0%
Public	33.3%	66.7%
% of Total Response	50.6%	49.4%

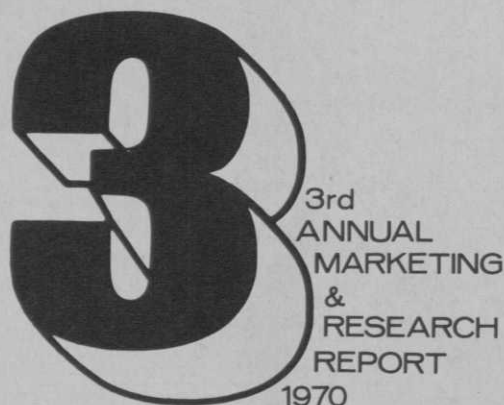
Average Amount Won by Pros Who Earn Money from Tournament Play

Type of course	Average earned
Private	\$ 930
Semi-private	\$ 680
Hotel/Resort	\$ 640
Public	\$1,600



GOLF CARS

*... defied the current state of the economy
and continued growing in numbers and
rental revenues*



Golf car business rode out 1970 with greater success than the other sources of golf course revenue. In view of the hefty growth in income from golf car rentals, golf course administrators apparently felt this was one area where drastic cutbacks in expenditures would be unwise. Although actual growth in the size of fleets did not meet managers' predictions for 1970, the average fleet still climbed 7.4 per cent, from 27 cars in 1969 to 29 cars in 1970. And total gross revenue from golf car rentals at United States facilities jumped 31.4 per cent, from \$143 million in 1969 to almost \$188 million in 1970, according to GOLFDOM's Third Annual Marketing and Research Study.

In a breakdown of average revenues by type of course, only public facilities noted a slight decrease. However, every course type noted some increase in the size of its golf car fleet.

Some 78.6 per cent of the manager-respondents indicated that their facilities have fleets. If this figure is projected to the 9,083 regulation facilities in the United States, it may be estimated that about 7,140 have golf car fleets. At an average size of 29 cars, total number of golf

cars at United States regulation facilities in 1970 would be more than 207,000. Including the average additions predicted by managers for 1971, the total could climb to more than 235,600 by year-end. This does not include those golf facilities that plan to acquire fleets for the first time this year. The study indicated that of the managers whose facilities did not have fleets, 21.3 per cent said they planned to acquire cars in the near future.

Professionals were asked if they retain any of the revenue from golf cars and if so, how much of it. Over-all, more than 74 per cent said that they retained some portion of the golf car revenue. (Generally, any division of revenue from golf car rentals would be between the professional and the club.) Of those who participate in revenue, some 34.4 per cent indicated that they retain 100 per cent. However, this figure is matched at the other end of the scale, with another 36.7 per cent of the professionals indicating that they retain only 25 per cent or less of the revenue. The remaining 29 per cent are almost evenly distributed in the three middle brackets, retaining 75 to 99 per cent, 50 to 74 per cent or 25 to 49 per cent of the revenue. □

Golf Car Tables and Graphs

Gross revenue from car rentals	
Average	71
National grand totals	71
Gross revenue retained by professionals	71
Percentage of pros who participate in car revenue	74
Sizes of golf car fleets	
Average	74
Over-all average	74

DOLBY

**The Complete
Caretaker**

INDOORS & OUT



Par for



"My championship flight for all golf course maintenance," says Vance R. Price, superintendent of Tanglewood Park, Clemmons, North Carolina, "are these Dolge winners. Any course is easier to keep up to par at less cost with Dolge products. They have my heartiest recommendation for every golf course maintenance need."

Dolge Stroke-Savers

- 1. TOTE Weed Eradicator.** Total kill, plus maximum safety. Acts positively on annuals, biennials, perennials; sterilizes soil. Exceptionally high LD rating. One gallon of TOTE in 15 gallons water treats 1000 sq. ft. at 83.3% saving.
- 2. E.W.T. 2,4-D Selective weed killer** kills all broadleaf weeds—dandelions, plantain, poison ivy.
- 3. PENETRATE.** Organic soil improver opens dense soils, improves porosity, encourages deeper, stronger root growth. Not a wetting agent.
- 4. DOLGE LAKE DYE.** Turns muddy water hazards and ponds bright, lasting blue. No danger to pets or wildlife.
- 5. BOOST J-70.** Miracle solvent cleaner for all machinery from mowers to golf carts. Improves wearing qualities, keeps them at top performance level years longer. Non-flammable.
- 6. NEW ALL PURPOSE, BROAD SPECTRUM TURF FUNGICIDE.** One fungicide to control *all* turf diseases. Another Dolge first!

PLUS—Dolge makes all the extras to make your maintenance job easier. Such as: CRABGRAX (AMA/DSMA), for positive crab grass control, even hard to kill silver crab grass. Full line of Turf Insecticides to control animal and insect pests. DOLCO *Pine Ball Wash*, pleasantly piney, quick thorough cleaning of golf balls in paddle or rotary machines.

DEPENDABLE
DOLGE
WHERE CLEANUP IS A SCIENCE



the Course

For Better Grounds Maintenance—Dolge, the Complete Caretaker.



Dolge Indoor Threesome

1. CINDET, the one multi-purpose cleaner and wax stripper does all routine cleaning jobs better, faster, easier. Cleans all surfaces, floors, walls.
2. KING-COTE® the all-purpose zinc-interlocked floor finish that obsoletes all others. Superb layup; slip resistant.
3. BRITE N' UP, the 20 minute rug shampoo. Get carpet sparkling clean, walk on it 20 minutes later!



Plus Dolge Extras to Make Maintenance Easier—Dress-up Furniture Polish; Wind-O-Shine; Disinfectants; Athlete's-foot Control Fungicide, Hand Soaps, Dispensers, Deodorants for the locker room.

DEPENDABLE
DOLGE
 WHERE CLEANUP IS A SCIENCE

Up-to-Par Club House Maintenance

Indoors & Out—Dolge, the Complete Caretaker.