

2021

Maintenance Budget Survey



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INTRODUCTION

The intent of this survey and this subsequent publication is to establish baselines, trends, and allocations of resources as they relate to golf course operational budgets and today's golf course management.

From March 30th through April 28th, 2021, a survey was conducted by McMahon Group, Inc. on behalf of the Golf Course Superintendents Association of America to gather information and to study the expenditures, budgeting, and spending habits of golf course superintendents in the United States and overseas.

Unique survey invitation links were distributed via email to the sample group of class A and B superintendent members, totaling 8,078 individuals. By default, the unique links could be used only for one survey, preventing ballot box "stuffing" and "spamming". A total of 1,805 surveys were completed and returned, for a response rate of 22%.

Margin of Error

This response rate is excellent and provides an accurate representation of the entire class A and B GCSAA membership. Margin of error is a theoretical margin of error, plus or minus in percentage points, 95% of the time, on questions where opinion is evenly split. For "average" values, most results will be within +/- 2 percentage points range of error with a 95% level of confidence. That is, chances are 19 out of 20 that if all Class A and B members completed and returned their surveys, the average would differ from the sample results by no more than +/- 2 percentage points. For many questions, the error range would be smaller than this.

Rounding, Total Responses and Cleaning

Due to rounding, percentages for some questions may not total 100%. Not all respondents answered every question in the survey; therefore, the total number of responses to a question may be less than the total responses to the survey. All studies, no matter how well designed and implemented, must deal with errors from various sources and their effects on survey results. McMahon Group examined data for three different kinds of possible errors and eliminated the data from the surveys started. These cleaning parameters are:

1. Lack of data – 45% or fewer answered questions per respondent, removed entire response.
2. Outliers and inconsistencies – Values that are so far beyond the typical that they seem potentially erroneous.
3. Suspect analysis results – Answers to some questions seem counterintuitive or extremely unlikely.

Introduction (continued)

A Sampling of all Respondents

Survey Sample Overview

Sample Size	8,078
Surveys Started	2,241
Usable Surveys after Cleaning	1,805
Percent of total sample size	22%
Margin of Error	+/- 2%

Sampling by Facility Size

9-Hole	6%
18-Hole	74%
27-Hole	8%
36-Hole	8%
45 Through 90-Hole	3%

Geographic Area of Respondents*

North Central	22%
Southeast	22%
Transition	19%
Northeast	15%
Upper Mountain-West	9%
Southwest	6%
Pacific	4%
Not in the U S A	3%
Hawaii	< 1%

*See map on page 23

Types of Golf Course Reporting

Private	45%
Daily Fee	19%
Semi-Private	18%
Municipal	17%

EXECUTIVE SUMMARY

Alone, budgets should never be used to compare golf courses. The averages contained in this report are an amalgamation of many types of golf courses. Golf courses differ in many ways, in far more unique characteristics than can be included in these pages. Due to these vast differences, one must judge the effectiveness of budgetary expenditures by degree of satisfaction of the golfers that play that golf course, not merely by the number of resources or money spent on maintenance.

Maintenance Budget Breakdown by Region, Facility Type and Green Fee

Respondents were asked to provide their total actual maintenance budget including all labor expenses and excluding capital expenditures. In 2020, the nationwide average maintenance budget for an 18-hole golf course was \$767,085.

Executive Summary (continued)

This study will focus primarily on the calendar year 2020 actual golf maintenance expenditures. For statistical continuity only 18-hole golf course data was used. In many circumstances, respondents from outside the USA and Hawaii failed to answer in a significant number to result in a meaningful statistic.

Golf Course Maintenance Expenditures by Region								
	Overall	Pacific	Upper West-Mountain	Southwest	North Central	Transition	Southeast	Northeast
2019 Actual	\$768,471	\$998,480	\$681,597	\$1,168,674	\$532,701	\$700,052	\$916,055	\$836,416
2020 Actual	\$767,085	\$1,037,690	\$712,680	\$1,169,614	\$526,948	\$714,727	\$922,052	\$804,125
2021 Budgeted	\$810,254	\$1,088,352	\$761,433	\$1,209,882	\$539,301	\$748,363	\$986,188	\$875,376

Table 1 Golf course maintenance expenditures by region

Golf Course Maintenance Expenditures by Course Type and Green Fee											
	Overall	Course Type				Green Fee					
		Municipal	Semi-Private	Private	Daily Fee	< \$40	\$40 - \$55	\$56 - \$70	\$71 - \$85	\$86 - \$100	Greater than \$100
2019 Actual	\$768,471	\$594,338	\$539,478	\$1,024,565	\$528,939	\$344,444	\$459,418	\$567,658	\$665,988	\$850,837	\$1,182,863
2020 Actual	\$767,085	\$579,510	\$544,268	\$1,022,885	\$528,743	\$347,083	\$463,329	\$564,273	\$676,571	\$847,695	\$1,174,112
2021 Budgeted	\$810,254	\$621,190	\$567,346	\$1,083,647	\$556,613	\$362,579	\$500,115	\$593,313	\$715,287	\$889,707	\$1,245,447

Table 2 Golf course expenditures by course type and green fee

Gross Revenue

Tables 3 through 5 represent the gross revenue of 18-hole facilities by facility type and region. Gross revenues are closely correlated with total maintenance expenditures at 16% to 23% across golf course facility types, green fees, and locations. The overall average percentage of total gross revenue allotted for golf course maintenance expenses is 18%.

Maintenance Expenditures as a Percentage of Gross Revenue by Facility Type					
	Overall	Municipal	Semi-Private	Private	Daily Fee
Average Gross Revenue		\$2,680,000	\$3,390,000	\$5,520,000	\$3,312,000
Maintenance Expenditures		\$579,510	\$544,268	\$1,022,885	\$528,743
% Maintenance Expenses of Gross Revenue 2020	18%	22%	16%	19%	16%

Table 3 2020 actual percentage of gross revenue allotted for maintenance expenditures by facility type

Maintenance Expenditures as a Percentage of Gross Revenue by Green Fee							
	Overall	Green Fee					
		< \$40	\$40 - \$55	\$56 - \$70	\$71 - \$85	\$86 - \$100	>\$100
% Maintenance Expenses of Gross Revenue 2020	18%	15%	15%	18%	17%	20%	24%

Table 4 2020 actual percentage of gross revenue allocated for maintenance expenditures by green fee

Gross Revenue (continued)

Maintenance Expenditures as a Percentage of Gross Revenue by Region								
	Overall	Pacific	Upper West-Mountain	Southwest	North Central	Transition	Southeast	Northeast
% Maintenance Expenses of Gross Revenue 2020	18%	17%	19%	17%	19%	18%	18%	18%

Table 5 2020 actual percentage of gross revenue allocated for maintenance expenditures by region

Labor

Labor, as a percent of total expenditures, varied little (no more than 7 percentage points) by region, type of facility or green fee as illustrated in Tables 7 and 9.

18-Hole Facility Labor Dollar Expenditures by Region								
	Overall	Pacific	Upper West-Mountain	Southwest	North Central	Transition	Southeast	Northeast
Actual Labor 2019	\$ 436,910	\$ 576,189	\$ 378,108	\$ 619,309	\$ 300,702	\$ 403,865	\$ 521,840	\$ 491,919
Actual Labor 2020	\$ 435,217	\$ 601,224	\$ 391,610	\$ 611,913	\$ 300,424	\$ 403,053	\$ 534,345	\$ 470,735
Labor Budget 2021	\$ 463,163	\$ 615,297	\$ 406,312	\$ 645,238	\$ 317,968	\$ 427,939	\$ 560,308	\$ 519,257
Average	\$ 445,097	\$ 597,570	\$ 392,010	\$ 625,487	\$ 306,365	\$ 411,619	\$ 538,831	\$ 493,970

Table 6 Facility total labor dollar expenditure by region

18-Hole Facility Labor Percentage of Total Operational Expenditures by Region								
	Overall	Pacific	Upper West-Mountain	Southwest	North Central	Transition	Southeast	Northeast
Actual Labor 2019	57%	58%	55%	53%	56%	58%	57%	59%
Actual Labor 2020	57%	58%	55%	52%	57%	56%	58%	59%
Labor Budget 2021	57%	57%	53%	53%	59%	57%	57%	59%
Average	57%	58%	54%	53%	57%	57%	57%	59%

Table 7 Facility labor percentage of total operational expenditures by region

18-Hole Facility Labor Dollars of Total Expenditures by Course Type and Green Fee											
	Overall	Course Type				Green Fee					
		Municipal	Semi-Private	Private	Daily Fee	< \$40	\$40 - \$55	\$56 - \$70	\$71 - \$85	\$86 - \$100	>\$100
Actual Labor 2019	\$ 436,910	\$ 328,890	\$ 292,690	\$ 595,238	\$ 290,091	\$ 193,151	\$ 260,605	\$ 296,773	\$ 365,003	\$ 482,777	\$ 693,823
Actual Labor 2020	\$ 435,217	\$ 328,046	\$ 291,407	\$ 593,344	\$ 286,310	\$ 196,559	\$ 263,125	\$ 298,639	\$ 353,538	\$ 479,270	\$ 689,655
Labor Budget 2021	\$ 463,163	\$ 349,839	\$ 312,476	\$ 630,104	\$ 306,968	\$ 208,881	\$ 279,423	\$ 318,516	\$ 390,963	\$ 497,054	\$ 736,107
Average	\$ 445,097	\$ 335,592	\$ 298,858	\$ 606,228	\$ 294,456	\$ 199,530	\$ 267,718	\$ 304,643	\$ 369,835	\$ 486,367	\$ 706,528

Table 8 Facility labor dollars by course type and green fee

Labor (continue)

18-Hole Facility Labor Percentage of Total Expenditures by Course Type and Green Fee											
	Overall	Course Type				Green Fee					
		Municipal	Semi-Private	Private	Daily Fee	< \$40	\$40 - \$55	\$56 - \$70	\$71 - \$85	\$86 - \$100	>\$100
Actual Labor 2019	57%	55%	54%	58%	55%	56%	57%	52%	55%	57%	59%
Actual Labor 2020	57%	57%	54%	58%	54%	57%	57%	53%	52%	57%	59%
Labor Budget 2021	57%	56%	55%	58%	55%	58%	56%	54%	55%	56%	59%
Average	57%	56%	54%	58%	55%	57%	56%	53%	54%	56%	59%

Table 9 Facility labor percentage of total operational expenditures by facility type and green fee

Water

Nationwide, 26% of golf courses purchased water, unchanged from 2017, the last year of the survey. Water is the line item that varied most from region (Table 10). Water might well be one of the most important topics in coming years with recent drought pressures and newly - implemented government regulations on its use.

18-Hole Facility Water Expenditures by Region								
	Overall	Pacific	Upper West-Mountain	Southwest	North Central	Transition	Southeast	Northeast
Actual Water 2019	\$93,431	\$107,741	\$72,834	\$220,326	\$30,250	\$76,879	\$56,483	\$42,306
Actual Water 2020	\$98,811	\$117,779	\$85,563	\$230,832	\$36,566	\$83,839	\$55,837	\$58,432
Water Budget 2021	\$107,160	\$143,833	\$76,094	\$238,715	\$35,455	\$88,221	\$72,798	\$50,823

Table 10 Eighteen-Hole facility water expenditures for courses that purchased water

Overall nationwide, of those golf courses purchasing water in 2020, the actual expenditures were reported at nearly 13% of total budget.

Largest Expenditures

The largest portions of any golf maintenance budget are summarized in Table 11. These six expense categories make-up 78.29% of the total budget at courses overall / nationwide, according to respondents for actual expenditures during 2020.

Largest Expenditures (continued)

Largest Golf Course Maintenance Expenses	
Expenses	Percent of Budget
Labor	56.74%
Fertilizer	5.05%
Equipment Lease Expense	5.01%
Repair Maintenance/Equipment	4.56%
Fungicides	4.28%
Fuel and Lubricants	2.65%

Table 11 Largest expenditures of golf course budget, 2020 overall / nationwide, excluding water

THE 18-HOLE GOLF COURSE OPERATIONAL BUDGET

Actual 18-Hole Maintenance Budget Ranges by Region									
Budget Range	Overall	Pacific	Upper West-Mountain	Southwest	North Central	Transition	Southeast	Northeast	Not in USA
<Less Than \$200,000	4.7%	2.9%	1.4%	2.2%	6.5%	5.8%	3.9%	5.3%	4.3%
\$200,001-\$350,000	13.2%	2.9%	13.9%	8.7%	26.6%	11.7%	5.6%	10.1%	13.0%
\$350,001-\$600,000	30.1%	20.0%	41.6%	15.2%	33.7%	33.8%	25.0%	26.5%	34.8%
\$600,001-\$1,000,000	28.4%	42.9%	23.6%	23.9%	25.0%	29.9%	33.9%	27.4%	34.8%
\$1,000,001-\$1,500,000	14.2%	20.0%	13.9%	23.9%	7.7%	13.6%	14.4%	18.5%	8.7%
Greater Than \$1,500,000	9.4%	11.3%	5.6%	26.1%	0.5%	5.2%	17.2%	12.2%	4.4%

Table 12 2020 actual range of golf course maintenance expenditure by region

Actual 18-Hole Maintenance Budget Ranges by Facility Type					
Budget Range	Overall	Municipal	Semi-Private	Private	Daily Fee
<Less Than \$200,000	4.7%	3.7%	5.4%	2.1%	10.6%
\$200,001-\$350,000	13.2%	18.7%	22.1%	3.5%	23.1%
\$350,001-\$600,000	30.1%	44.0%	40.3%	18.4%	36.3%
\$600,001-\$1,000,000	28.4%	26.9%	26.2%	32.9%	21.3%
\$1,000,001-\$1,500,000	14.2%	4.5%	4.7%	24.9%	6.2%
Greater Than \$1,500,000	9.4%	2.2%	1.3%	18.2%	2.5%

Table 13 2020 actual range of golf course maintenance expenditure by facility type

The 18-Hole Golf Course Operational Budget (continued)

Actual 18-Hole Maintenance Budget Ranges by Green Fee							
	Overall	< \$40	\$40 - \$55	\$56 - \$70	\$71 - \$85	\$86 - \$100	Greater than \$100
<Less Than \$200,000	4.9%	21.0%	8.3%	4.0%	1.0%	1.0%	1.2%
\$200,001-\$350,000	14.0%	37.1%	28.0%	14.2%	12.0%	5.0%	2.0%
\$350,001-\$600,000	29.3%	32.3%	42.3%	57.1%	34.0%	22.7%	9.0%
\$600,001-\$1,000,000	30.6%	9.6%	19.6%	18.3%	43.0%	43.6%	31.8%
\$1,000,001-\$1,500,000	13.3%	0.0%	1.2%	4.8%	7.0%	19.8%	31.8%
Greater Than \$1,500,000	7.9%	0.0%	0.6%	1.6%	3.0%	7.9%	24.2%

Table 14 2020 actual golf course expenditure ranges by green fee

Table 15 below illustrates survey participants anticipated funding trends in maintenance expenses from 2021 to 2022, by region.

Anticipated Budget Increase, Decrease or Remain Unchanged in 2022									
	Overall	Pacific	Upper West-Mountain	Southwest	North Central	Transition	Southeast	Northeast	Not in USA
Increase	55.3%	86.1%	48.0%	51.1%	50.3%	46.8%	67.2%	54.4%	52.0%
Decrease	4.4%	0.0%	1.3%	10.6%	5.9%	5.1%	2.2%	4.8%	4.0%
Unchanged	40.3%	13.9%	50.7%	38.3%	43.8%	48.1%	30.6%	40.8%	44.0%

Table 15 Anticipated change in budget funding from 2021 to 2022

Overall nationwide, a 55.3% majority of respondents estimate that their 2022 operational budget will increase. Survey participants say their estimated 2022 expenditures will remain the same at 40.3%. Just 4.4% predict there will be a decrease in their facilities approved 2022 budget.

Tables 16 and 17 show actual costs for 2019, 2020 and 2021 budgeted costs of maintenance per acre of maintained turf at 18-hole golf courses, based on region, course type and green fee.

Regional Golf Course Maintenance Expenditures per Acre									
	Overall	Pacific	Upper West-Mountain	Southwest	North Central	Transition	Southeast	Northeast	
Actual 2019	\$ 6,741	\$ 8,759	\$ 5,979	\$ 10,252	\$ 4,673	\$ 6,141	\$ 8,036	\$ 7,337	
Actual 2020	\$ 6,729	\$ 9,103	\$ 6,252	\$ 10,260	\$ 4,622	\$ 6,270	\$ 8,088	\$ 7,054	
Budgeted 2021	\$ 7,107	\$ 9,547	\$ 6,679	\$ 10,613	\$ 4,731	\$ 6,565	\$ 8,651	\$ 7,679	
Average	\$ 6,859	\$ 9,136	\$ 6,303	\$ 10,375	\$ 4,675	\$ 6,325	\$ 8,258	\$ 7,356	

Table 16 Regional golf course maintenance expenditures per acre

The 18-Hole Golf Course Operational Budget (continued)

	Golf Course Type and Green Fee Golf Course Maintenance Expenditures per Acre										
	Overall	Course Type				Green Fee					
		Municipal	Semi-Private	Private	Daily Fee	< \$40	\$40 - \$55	\$56 - \$70	\$71 - \$85	\$86 - \$100	>\$100
Actual 2019	\$ 6,741	\$ 5,213	\$ 4,732	\$ 8,987	\$ 4,640	\$ 3,021	\$ 4,030	\$ 4,979	\$ 5,842	\$ 7,463	\$ 10,376
Actual 2020	\$ 6,729	\$ 5,083	\$ 4,774	\$ 8,973	\$ 4,638	\$ 3,045	\$ 4,064	\$ 4,950	\$ 5,935	\$ 7,436	\$ 10,299
Budget 2021	\$ 7,107	\$ 5,449	\$ 4,977	\$ 9,506	\$ 4,883	\$ 3,181	\$ 4,387	\$ 5,204	\$ 6,274	\$ 7,804	\$ 10,925
Average	\$ 6,859	\$ 5,249	\$ 4,828	\$ 9,155	\$ 4,720	\$ 3,082	\$ 4,160	\$ 5,045	\$ 6,017	\$ 7,568	\$ 10,533

Table 17 Golf course type and green fee for golf course maintenance expenditures per acre

THE 18-HOLE GOLF COURSE BUDGET LINE ITEMS

Tables 18 to 29 that follow, display actual line item average amounts and percentages for 2019 and 2020, and budgeted average amounts for 2021. Line items for water and overseeding only include responses from courses that indicated they purchased water or overseeded. These two items are more relevant based on region than type of course, and thus is only displayed in regional tables.

The 18-Hole Golf Course Budget Line Items (continued)

Expenditures and Budgets Nationwide

Average Nationwide 18-Hole Maintenance Budget						
Line Items	2019		2020		2021	
	Actual		Actual		Budget	
Labor	\$436,910	60.67%	\$435,217	60.32%	\$463,163	60.00%
Power Irrigation	\$14,271	1.98%	\$15,040	2.08%	\$15,421	2.00%
Utilities Maintenance Building	\$12,390	1.72%	\$12,897	1.79%	\$13,819	1.79%
Equipment Lease Expense	\$37,976	5.27%	\$38,435	5.33%	\$43,073	5.58%
Repair / Maintenance Equipment	\$35,439	4.92%	\$34,959	4.85%	\$36,861	4.78%
Fertilizer	\$37,829	5.25%	\$38,753	5.37%	\$41,351	5.36%
Herbicides	\$12,475	1.73%	\$12,954	1.80%	\$14,124	1.83%
Fungicides	\$32,731	4.54%	\$32,817	4.55%	\$34,724	4.50%
Insecticides	\$6,295	0.87%	\$6,376	0.88%	\$6,956	0.90%
Growth Regulators	\$3,982	0.55%	\$4,439	0.62%	\$5,668	0.73%
Wetting Agents	\$5,113	0.71%	\$5,389	0.75%	\$5,845	0.76%
Fuel and Lubricants	\$21,228	2.95%	\$20,358	2.82%	\$22,266	2.88%
Small Tools	\$3,854	0.54%	\$3,825	0.53%	\$4,191	0.54%
Equipment Rental	\$2,533	0.35%	\$2,600	0.36%	\$2,616	0.34%
Irrigation Repairs and Maintenance	\$11,019	1.53%	\$11,977	1.66%	\$11,649	1.51%
Refuse / Waste Removal	\$3,446	0.48%	\$3,558	0.49%	\$3,722	0.48%
Sand / Soil	\$16,604	2.31%	\$16,294	2.26%	\$18,509	2.40%
Seed / Sod / Sprigs	\$8,190	1.14%	\$8,115	1.12%	\$8,640	1.12%
Continuing Education / Travel	\$2,568	0.36%	\$2,009	0.28%	\$2,547	0.33%
Dues / Subscriptions	\$1,278	0.18%	\$1,295	0.18%	\$1,383	0.18%
Service Agreements	\$6,727	0.93%	\$7,267	1.01%	\$7,666	0.99%
Golf Course Accessories	\$5,288	0.73%	\$4,930	0.68%	\$5,546	0.72%
Office and Building Supplies	\$2,014	0.28%	\$2,017	0.28%	\$2,207	0.29%

Table 18 Nationwide 18-hole maintenance budget - all course types

The 18-Hole Golf Course Budget Line Items (continued)

Expenditures and Budgets by Facility Type

Average Municipal-Nationwide 18-Hole Maintenance Budget						
Line Items	2019		2020		2021	
	Actual		Actual		Budget	
Labor	\$328,890	62.88%	\$328,046	63.11%	\$349,839	62.93%
Power Irrigation	\$12,285	2.35%	\$12,088	2.33%	\$12,730	2.29%
Utilities Maintenance Building	\$13,398	2.56%	\$14,620	2.81%	\$15,882	2.86%
Equipment Lease Expense	\$15,944	3.05%	\$14,378	2.77%	\$20,785	3.74%
Repair / Maintenance Equipment	\$27,769	5.31%	\$28,398	5.46%	\$28,080	5.05%
Fertilizer	\$24,772	4.74%	\$24,602	4.73%	\$26,019	4.68%
Herbicides	\$9,298	1.78%	\$8,933	1.72%	\$10,409	1.87%
Fungicides	\$21,450	4.10%	\$19,629	3.78%	\$20,665	3.72%
Insecticides	\$3,334	0.64%	\$3,322	0.64%	\$3,688	0.66%
Growth Regulators	\$2,355	0.45%	\$2,601	0.50%	\$2,929	0.53%
Wetting Agents	\$2,154	0.41%	\$2,883	0.55%	\$3,310	0.60%
Fuel and Lubricants	\$15,217	2.91%	\$14,564	2.80%	\$16,035	2.88%
Small Tools	\$2,841	0.54%	\$2,813	0.54%	\$2,699	0.49%
Equipment Rental	\$3,171	0.61%	\$2,700	0.52%	\$2,713	0.49%
Irrigation Repairs and Maintenance	\$8,890	1.70%	\$8,786	1.69%	\$8,351	1.50%
Refuse / Waste Removal	\$1,702	0.33%	\$1,682	0.32%	\$1,760	0.32%
Sand / Soil	\$10,914	2.09%	\$10,270	1.98%	\$11,391	2.05%
Seed / Sod / Sprigs	\$4,678	0.89%	\$5,347	1.03%	\$4,931	0.89%
Continuing Education / Travel	\$1,633	0.31%	\$1,321	0.25%	\$1,654	0.30%
Dues / Subscriptions	\$996	0.19%	\$995	0.19%	\$1,045	0.19%
Service Agreements	\$5,304	1.01%	\$6,040	1.16%	\$4,720	0.85%
Golf Course Accessories	\$3,996	0.76%	\$3,703	0.71%	\$4,179	0.75%
Office and Building Supplies	\$2,013	0.38%	\$2,111	0.41%	\$2,093	0.38%

Table 19 Municipal-nationwide 18-hole maintenance budget

The 18-Hole Golf Course Budget Line Items (continued)

Average Semi-Private-Nationwide 18-Hole Maintenance Budget						
	2019		2020		2021	
	Actual		Actual		Budget	
Line Items						
Labor	\$292,690	58.22%	\$291,407	57.61%	\$312,476	57.81%
Power Irrigation	\$13,195	2.62%	\$14,313	2.83%	\$13,885	2.57%
Utilities Maintenance Building	\$9,348	1.86%	\$9,294	1.84%	\$10,414	1.93%
Equipment Lease Expense	\$30,871	6.14%	\$30,543	6.04%	\$32,206	5.96%
Repair / Maintenance Equipment	\$25,960	5.16%	\$26,194	5.18%	\$25,988	4.81%
Fertilizer	\$28,776	5.72%	\$29,742	5.88%	\$32,788	6.07%
Herbicides	\$10,920	2.17%	\$11,524	2.28%	\$12,165	2.25%
Fungicides	\$20,649	4.11%	\$21,674	4.29%	\$23,084	4.27%
Insecticides	\$4,061	0.81%	\$4,420	0.87%	\$4,965	0.92%
Growth Regulators	\$2,812	0.56%	\$3,034	0.60%	\$3,154	0.58%
Wetting Agents	\$3,133	0.62%	\$3,279	0.65%	\$3,612	0.67%
Fuel and Lubricants	\$17,376	3.46%	\$17,781	3.52%	\$19,151	3.54%
Small Tools	\$3,106	0.62%	\$3,090	0.61%	\$3,134	0.58%
Equipment Rental	\$1,780	0.35%	\$1,674	0.33%	\$1,776	0.33%
Irrigation Repairs and Maintenance	\$8,404	1.67%	\$9,132	1.81%	\$8,716	1.61%
Refuse / Waste Removal	\$2,197	0.44%	\$2,260	0.45%	\$2,336	0.43%
Sand / Soil	\$11,419	2.27%	\$10,789	2.13%	\$12,442	2.30%
Seed / Sod / Sprigs	\$5,267	1.05%	\$5,526	1.09%	\$6,593	1.22%
Continuing Education / Travel	\$1,679	0.33%	\$1,448	0.29%	\$1,796	0.33%
Dues / Subscriptions	\$971	0.19%	\$965	0.19%	\$1,084	0.20%
Service Agreements	\$2,633	0.52%	\$2,542	0.50%	\$2,644	0.49%
Golf Course Accessories	\$3,670	0.73%	\$3,422	0.68%	\$4,280	0.79%
Office and Building Supplies	\$1,826	0.36%	\$1,761	0.35%	\$1,844	0.34%

Table 20 Semi-private-nationwide 18-hole maintenance budget

The 18-Hole Golf Course Budget Line Items (continued)

Average Private-Nationwide 18-Hole Maintenance Budget						
	2019		2020		2021	
	Actual		Actual		Budget	
Line Items						
Labor	\$595,238	61.49%	\$593,344	60.94%	\$630,104	60.67%
Power Irrigation	\$15,992	1.65%	\$17,059	1.75%	\$17,267	1.66%
Utilities Maintenance Building	\$13,859	1.43%	\$14,348	1.47%	\$14,998	1.44%
Equipment Lease Expense	\$54,706	5.65%	\$57,536	5.91%	\$63,079	6.07%
Repair / Maintenance Equipment	\$44,016	4.55%	\$43,247	4.44%	\$47,433	4.57%
Fertilizer	\$48,859	5.05%	\$50,834	5.22%	\$53,515	5.15%
Herbicides	\$15,396	1.59%	\$16,175	1.66%	\$17,436	1.68%
Fungicides	\$46,308	4.78%	\$47,086	4.84%	\$49,952	4.81%
Insecticides	\$8,983	0.93%	\$8,980	0.92%	\$9,813	0.94%
Growth Regulators	\$5,521	0.57%	\$6,312	0.65%	\$6,565	0.63%
Wetting Agents	\$7,063	0.73%	\$7,526	0.77%	\$8,018	0.77%
Fuel and Lubricants	\$26,540	2.74%	\$24,863	2.55%	\$27,373	2.64%
Small Tools	\$5,123	0.53%	\$5,015	0.52%	\$5,669	0.55%
Equipment Rental	\$2,945	0.30%	\$3,263	0.34%	\$3,145	0.30%
Irrigation Repairs and Maintenance	\$13,277	1.37%	\$14,780	1.52%	\$14,146	1.36%
Refuse / Waste Removal	\$4,963	0.51%	\$5,115	0.53%	\$5,363	0.52%
Sand / Soil	\$22,895	2.37%	\$22,543	2.32%	\$26,019	2.51%
Seed / Sod / Sprigs	\$10,857	1.12%	\$10,425	1.07%	\$10,651	1.03%
Continuing Education / Travel	\$3,797	0.39%	\$2,888	0.30%	\$3,641	0.35%
Dues / Subscriptions	\$1,687	0.17%	\$1,709	0.18%	\$1,804	0.17%
Service Agreements	\$10,526	1.09%	\$11,449	1.18%	\$12,725	1.23%
Golf Course Accessories	\$7,018	0.72%	\$6,626	0.68%	\$7,150	0.69%
Office and Building Supplies	\$2,490	0.26%	\$2,468	0.25%	\$2,771	0.27%

Table 21 Private-nationwide 18-hole maintenance budget

The 18-Hole Golf Course Budget Line Items (continued)

Average Daily Fee-Nationwide 18-Hole Maintenance Budget						
	2019		2020		2021	
	Actual		Actual		Budget	
Line Items						
Labor	\$290,091	57.85%	\$286,310	57.84%	\$306,968	57.38%
Power Irrigation	\$12,836	2.56%	\$13,359	2.70%	\$14,657	2.74%
Utilities Maintenance Building	\$10,660	2.13%	\$11,124	2.25%	\$12,342	2.31%
Equipment Lease Expense	\$23,160	4.62%	\$20,357	4.11%	\$24,648	4.61%
Repair / Maintenance Equipment	\$30,112	6.00%	\$28,982	5.85%	\$29,276	5.47%
Fertilizer	\$30,445	6.07%	\$29,839	6.03%	\$32,803	6.13%
Herbicides	\$9,818	1.96%	\$10,260	2.07%	\$11,462	2.14%
Fungicides	\$21,265	4.24%	\$21,035	4.25%	\$22,153	4.14%
Insecticides	\$4,472	0.89%	\$4,667	0.94%	\$4,953	0.93%
Growth Regulators	\$2,898	0.58%	\$3,042	0.61%	\$3,172	0.59%
Wetting Agents	\$4,756	0.95%	\$4,408	0.89%	\$4,932	0.92%
Fuel and Lubricants	\$16,943	3.38%	\$16,623	3.36%	\$17,910	3.35%
Small Tools	\$2,320	0.46%	\$2,442	0.49%	\$2,489	0.47%
Equipment Rental	\$1,713	0.34%	\$1,785	0.36%	\$2,055	0.38%
Irrigation Repairs and Maintenance	\$9,703	1.94%	\$10,478	2.12%	\$11,002	2.06%
Refuse / Waste Removal	\$2,281	0.45%	\$2,440	0.49%	\$2,542	0.48%
Sand / Soil	\$10,832	2.16%	\$11,382	2.30%	\$11,968	2.24%
Seed / Sod / Sprigs	\$7,376	1.47%	\$7,269	1.47%	\$8,737	1.63%
Continuing Education / Travel	\$1,314	0.26%	\$1,051	0.21%	\$1,432	0.27%
Dues / Subscriptions	\$829	0.17%	\$858	0.17%	\$948	0.18%
Service Agreements	\$2,864	0.57%	\$2,918	0.59%	\$3,177	0.59%
Golf Course Accessories	\$3,751	0.75%	\$3,316	0.67%	\$4,064	0.76%
Office and Building Supplies	\$1,022	0.20%	\$1,049	0.21%	\$1,272	0.24%

Table 22 Daily Fee-nationwide 18-hole maintenance budget

Expenditures and Budgets by Region

Average 18-Hole Maintenance Budget for the Pacific Region						
	2019		2020		2021	
	Actual		Actual		Budget	
Line Items						
Labor	\$576,189	57.71%	\$601,224	57.94%	\$615,297	56.53%
Power Irrigation	\$19,769	1.98%	\$18,370	1.77%	\$20,906	1.92%
Utilities Maintenance Building	\$18,537	1.86%	\$22,916	2.21%	\$20,611	1.89%
Equipment Lease Expense	\$30,113	3.02%	\$34,031	3.28%	\$34,995	3.22%
Repair / Maintenance Equipment	\$35,061	3.51%	\$35,126	3.38%	\$33,492	3.08%
Fertilizer	\$35,658	3.57%	\$36,894	3.56%	\$37,484	3.44%
Herbicides	\$8,547	0.86%	\$10,009	0.96%	\$8,996	0.83%
Fungicides	\$24,983	2.50%	\$25,365	2.44%	\$25,831	2.37%
Insecticides	\$1,628	0.16%	\$1,724	0.17%	\$1,936	0.18%
Growth Regulators	\$4,131	0.41%	\$4,557	0.44%	\$5,037	0.46%
Wetting Agents	\$7,630	0.76%	\$8,891	0.86%	\$9,241	0.85%
Fuel and Lubricants	\$24,281	2.43%	\$22,687	2.19%	\$23,768	2.18%
Small Tools	\$3,573	0.36%	\$2,884	0.28%	\$3,023	0.28%
Equipment Rental	\$879	0.09%	\$1,302	0.13%	\$1,042	0.10%
Irrigation Repairs and Maintenance	\$15,932	1.60%	\$12,977	1.25%	\$12,513	1.15%
Refuse / Waste Removal	\$3,717	0.37%	\$3,418	0.33%	\$3,625	0.33%
Sand / Soil	\$26,230	2.63%	\$23,169	2.23%	\$29,911	2.75%
Seed / Sod / Sprigs	\$8,917	0.89%	\$8,208	0.79%	\$9,461	0.87%
Continuing Education / Travel	\$2,016	0.20%	\$1,316	0.13%	\$2,206	0.20%
Dues / Subscriptions	\$1,580	0.16%	\$1,627	0.16%	\$1,630	0.15%
Service Agreements	\$15,299	1.53%	\$16,311	1.57%	\$15,613	1.43%
Golf Course Accessories	\$6,380	0.64%	\$5,999	0.58%	\$6,582	0.60%
Office and Building Supplies	\$2,357	0.24%	\$2,775	0.27%	\$2,653	0.24%
Water (38.9 % Purchased Water)	\$107,741	10.79%	\$117,779	11.35%	\$143,833	13.22%
Overseeding (8.3% Overseeded)	\$17,333	1.74%	\$18,133	1.75%	\$18,667	1.72%

Averages for water and overseeding only include respondents that indicate they purchase water or overseeded

Table 23 Average 18-hole maintenance budget for the Pacific region

The 18-Hole Golf Course Budget by Region (continued)

Average 18-Hole Maintenance Budget for the Upper-West Mountain Region						
Line Items	2019		2020		2021	
	Actual		Actual		Budget	
Labor	\$378,108	53.62%	\$391,610	53.25%	\$406,312	53.58%
Power Irrigation	\$22,112	3.14%	\$24,913	3.39%	\$25,800	3.40%
Utilities Maintenance Building	\$13,043	1.85%	\$13,968	1.90%	\$14,510	1.91%
Equipment Lease Expense	\$34,844	4.94%	\$33,428	4.55%	\$38,315	5.05%
Repair / Maintenance Equipment	\$43,485	6.17%	\$45,526	6.19%	\$45,449	5.99%
Fertilizer	\$28,959	4.11%	\$28,742	3.91%	\$30,327	4.00%
Herbicides	\$6,205	0.88%	\$7,560	1.03%	\$9,610	1.27%
Fungicides	\$11,522	1.63%	\$11,745	1.60%	\$12,268	1.62%
Insecticides	\$2,870	0.41%	\$2,021	0.27%	\$2,211	0.29%
Growth Regulators	\$3,503	0.50%	\$3,677	0.50%	\$4,030	0.53%
Wetting Agents	\$5,593	0.79%	\$6,062	0.82%	\$6,723	0.89%
Fuel and Lubricants	\$19,965	2.83%	\$18,262	2.48%	\$20,369	2.69%
Small Tools	\$3,795	0.54%	\$3,901	0.53%	\$3,998	0.53%
Equipment Rental	\$2,157	0.31%	\$2,201	0.30%	\$2,618	0.35%
Irrigation Repairs and Maintenance	\$12,802	1.82%	\$13,078	1.78%	\$12,442	1.64%
Refuse / Waste Removal	\$4,136	0.59%	\$4,039	0.55%	\$3,743	0.49%
Sand / Soil	\$17,545	2.49%	\$19,160	2.61%	\$20,423	2.69%
Seed / Sod / Sprigs	\$6,700	0.95%	\$5,246	0.71%	\$6,293	0.83%
Continuing Education / Travel	\$2,824	0.40%	\$2,273	0.31%	\$2,684	0.35%
Dues / Subscriptions	\$1,380	0.20%	\$1,316	0.18%	\$1,390	0.18%
Service Agreements	\$3,653	0.52%	\$4,181	0.57%	\$5,125	0.68%
Golf Course Accessories	\$5,059	0.72%	\$4,914	0.67%	\$5,397	0.71%
Office and Building Supplies	\$2,057	0.29%	\$2,101	0.29%	\$2,137	0.28%
Water (44.0 % Purchased Water)	\$72,834	10.33%	\$85,563	11.63%	\$76,094	10.04%
Overseeding (0% Overseeded)	\$0	0.00%	\$0	0.00%	\$0	0.00%

Averages for water only include respondents that indicate they purchase water, not enough respondents overseeded turf to make a statistical representation

Table 24 Average 18-hole maintenance budget for the Upper-West Mountain region

The 18-Hole Golf Course Budget by Region (continued)

Average 18-Hole Maintenance Budget for the Southwest Region						
	2019 Actual		2020 Actual		2021 Budget	
Line Items						
Labor	\$619,309	46.72%	\$611,913	46.01%	\$645,238	45.68%
Power Irrigation	\$38,795	2.93%	\$40,249	3.03%	\$41,891	2.97%
Utilities Maintenance Building	\$24,452	1.84%	\$24,134	1.81%	\$30,454	2.16%
Equipment Lease Expense	\$63,141	4.76%	\$62,741	4.72%	\$67,948	4.81%
Repair / Maintenance Equipment	\$45,067	3.40%	\$46,937	3.53%	\$45,779	3.24%
Fertilizer	\$55,512	4.19%	\$55,007	4.14%	\$58,706	4.16%
Herbicides	\$20,842	1.57%	\$21,483	1.62%	\$23,075	1.63%
Fungicides	\$23,909	1.80%	\$24,447	1.84%	\$26,754	1.89%
Insecticides	\$5,603	0.42%	\$5,678	0.43%	\$6,477	0.46%
Growth Regulators	\$4,607	0.35%	\$5,208	0.39%	\$6,893	0.49%
Wetting Agents	\$5,939	0.45%	\$6,249	0.47%	\$8,024	0.57%
Fuel and Lubricants	\$27,945	2.11%	\$27,432	2.06%	\$30,128	2.13%
Small Tools	\$5,328	0.40%	\$5,060	0.38%	\$5,366	0.38%
Equipment Rental	\$1,761	0.13%	\$2,029	0.15%	\$2,357	0.17%
Irrigation Repairs and Maintenance	\$19,328	1.46%	\$21,471	1.61%	\$21,487	1.52%
Refuse / Waste Removal	\$11,354	0.86%	\$12,575	0.95%	\$13,081	0.93%
Sand / Soil	\$19,726	1.49%	\$20,734	1.56%	\$22,668	1.60%
Seed / Sod / Sprigs	\$33,173	2.50%	\$31,826	2.39%	\$35,172	2.49%
Continuing Education / Travel	\$2,153	0.16%	\$1,865	0.14%	\$2,307	0.16%
Dues / Subscriptions	\$1,524	0.11%	\$1,465	0.11%	\$1,520	0.11%
Service Agreements	\$13,434	1.01%	\$13,533	1.02%	\$14,734	1.04%
Golf Course Accessories	\$8,499	0.64%	\$8,480	0.64%	\$8,861	0.63%
Office and Building Supplies	\$1,433	0.11%	\$1,424	0.11%	\$1,698	0.12%
Water (70.0 % Purchased Water)	\$220,326	16.62%	\$230,832	17.35%	\$238,715	16.90%
Overseeding (60.0% Overseeded)	\$52,414	3.95%	\$47,311	3.56%	\$53,195	3.77%

Averages for water and overseeding only include respondents that indicate they purchase water or overseeded

Table 25 Average 18-hole maintenance budget for the Southwest region

The 18-Hole Golf Course Budget by Region (continued)

Average 18-Hole Maintenance Budget for the North Central Region						
Line Items	2019		2020		2021	
	Actual		Actual		Budget	
Labor	\$300,702	57.40%	\$300,424	56.75%	\$317,968	56.38%
Power Irrigation	\$6,625	1.26%	\$7,064	1.33%	\$7,387	1.31%
Utilities Maintenance Building	\$9,929	1.90%	\$10,212	1.93%	\$11,262	2.00%
Equipment Lease Expense	\$14,895	2.84%	\$14,887	2.81%	\$17,962	3.18%
Repair / Maintenance Equipment	\$26,099	4.98%	\$26,698	5.04%	\$32,887	5.83%
Fertilizer	\$19,647	3.75%	\$19,088	3.61%	\$20,153	3.57%
Herbicides	\$4,913	0.94%	\$4,889	0.92%	\$5,351	0.95%
Fungicides	\$35,267	6.73%	\$35,349	6.68%	\$37,044	6.57%
Insecticides	\$3,770	0.72%	\$3,842	0.73%	\$4,139	0.73%
Growth Regulators	\$3,108	0.59%	\$3,248	0.61%	\$3,504	0.62%
Wetting Agents	\$3,498	0.67%	\$3,656	0.69%	\$4,017	0.71%
Fuel and Lubricants	\$17,019	3.25%	\$16,004	3.02%	\$17,893	3.17%
Small Tools	\$2,409	0.46%	\$2,394	0.45%	\$2,710	0.48%
Equipment Rental	\$2,909	0.56%	\$2,517	0.48%	\$2,537	0.45%
Irrigation Repairs and Maintenance	\$7,348	1.40%	\$9,236	1.74%	\$7,515	1.33%
Refuse / Waste Removal	\$1,711	0.33%	\$1,789	0.34%	\$1,895	0.34%
Sand / Soil	\$10,047	1.92%	\$10,261	1.94%	\$11,603	2.06%
Seed / Sod / Sprigs	\$3,076	0.59%	\$3,710	0.70%	\$3,624	0.64%
Continuing Education / Travel	\$2,277	0.43%	\$1,809	0.34%	\$2,301	0.41%
Dues / Subscriptions	\$1,015	0.19%	\$1,057	0.20%	\$1,125	0.20%
Service Agreements	\$2,333	0.45%	\$2,260	0.43%	\$2,510	0.44%
Golf Course Accessories	\$3,410	0.65%	\$3,161	0.60%	\$3,616	0.64%
Office and Building Supplies	\$1,756	0.34%	\$1,786	0.34%	\$1,929	0.34%
Water (8.8 % Purchased Water)	\$30,250	5.77%	\$36,566	6.91%	\$35,455	6.29%
Overseeding (2.4% Overseeded)	\$9,869	1.88%	\$7,476	1.41%	\$7,579	1.34%

Averages for water and overseeding only include respondents that indicate they purchase water or overseeded

Table 26 Average 18-hole maintenance budget for the North Central region

The 18-Hole Golf Course Budget by Region (continued)

Average 18-Hole Maintenance Budget for the Transition Region						
	2019		2020		2021	
	Actual		Actual		Budget	
Line Items						
Labor	\$403,865	54.15%	\$403,053	53.49%	\$427,939	53.39%
Power Irrigation	\$8,864	1.19%	\$8,775	1.16%	\$9,481	1.18%
Utilities Maintenance Building	\$12,852	1.72%	\$12,863	1.71%	\$13,707	1.71%
Equipment Lease Expense	\$40,020	5.37%	\$39,995	5.31%	\$45,054	5.62%
Repair / Maintenance Equipment	\$31,063	4.16%	\$31,168	4.14%	\$29,835	3.72%
Fertilizer	\$30,448	4.08%	\$31,640	4.20%	\$34,249	4.27%
Herbicides	\$14,905	2.00%	\$14,729	1.95%	\$16,011	2.00%
Fungicides	\$35,062	4.70%	\$34,849	4.62%	\$36,568	4.56%
Insecticides	\$5,670	0.76%	\$5,859	0.78%	\$6,378	0.80%
Growth Regulators	\$3,452	0.46%	\$4,010	0.53%	\$4,585	0.57%
Wetting Agents	\$4,166	0.56%	\$4,275	0.57%	\$4,018	0.50%
Fuel and Lubricants	\$19,552	2.62%	\$18,779	2.49%	\$20,213	2.52%
Small Tools	\$3,679	0.49%	\$3,775	0.50%	\$3,991	0.50%
Equipment Rental	\$1,857	0.25%	\$1,981	0.26%	\$2,069	0.26%
Irrigation Repairs and Maintenance	\$8,847	1.19%	\$9,722	1.29%	\$10,190	1.27%
Refuse / Waste Removal	\$2,074	0.28%	\$2,104	0.28%	\$2,177	0.27%
Sand / Soil	\$12,036	1.61%	\$11,544	1.53%	\$13,257	1.65%
Seed / Sod / Sprigs	\$7,877	1.06%	\$7,212	0.96%	\$7,599	0.95%
Continuing Education / Travel	\$2,545	0.34%	\$1,790	0.24%	\$2,498	0.31%
Dues / Subscriptions	\$1,252	0.17%	\$1,327	0.18%	\$1,478	0.18%
Service Agreements	\$3,397	0.46%	\$4,564	0.61%	\$4,336	0.54%
Golf Course Accessories	\$4,003	0.54%	\$3,616	0.48%	\$4,326	0.54%
Office and Building Supplies	\$2,758	0.37%	\$2,713	0.36%	\$2,519	0.31%
Water (19.2 % Purchased Water)	\$76,879	10.31%	\$83,839	11.13%	\$88,221	11.01%
Overseeding (12.4% Overseeded)	\$8,698	1.17%	\$9,328	1.24%	\$10,874	1.36%

Averages for water and overseeding only include respondents that indicate they purchase water or overseeded

Table 27 Average 18-hole maintenance budget for the Transition region

The 18-Hole Golf Course Budget by Region (continued)

Average 18-Hole Maintenance Budget for the Southeast Region						
	2019		2020		2021	
	Actual		Actual		Budget	
Line Items						
Labor	\$521,840	54.36%	\$534,345	54.56%	\$560,308	52.97%
Power Irrigation	\$18,373	1.91%	\$18,103	1.85%	\$18,960	1.79%
Utilities Maintenance Building	\$12,609	1.31%	\$12,491	1.28%	\$13,077	1.24%
Equipment Lease Expense	\$63,798	6.65%	\$65,006	6.64%	\$73,278	6.93%
Repair / Maintenance Equipment	\$43,025	4.48%	\$39,277	4.01%	\$43,141	4.08%
Fertilizer	\$64,216	6.69%	\$68,166	6.96%	\$72,566	6.86%
Herbicides	\$24,539	2.56%	\$26,421	2.70%	\$28,444	2.69%
Fungicides	\$21,925	2.28%	\$22,300	2.28%	\$24,731	2.34%
Insecticides	\$9,577	1.00%	\$9,952	1.02%	\$10,746	1.02%
Growth Regulators	\$4,244	0.44%	\$5,211	0.53%	\$6,058	0.57%
Wetting Agents	\$5,607	0.58%	\$5,715	0.58%	\$7,785	0.74%
Fuel and Lubricants	\$25,737	2.68%	\$24,837	2.54%	\$26,833	2.54%
Small Tools	\$5,165	0.54%	\$5,148	0.53%	\$5,859	0.55%
Equipment Rental	\$3,188	0.33%	\$3,024	0.31%	\$2,549	0.24%
Irrigation Repairs and Maintenance	\$13,655	1.42%	\$14,767	1.51%	\$15,137	1.43%
Refuse / Waste Removal	\$4,552	0.47%	\$4,712	0.48%	\$4,994	0.47%
Sand / Soil	\$21,898	2.28%	\$21,779	2.22%	\$23,992	2.27%
Seed / Sod / Sprigs	\$7,924	0.83%	\$8,862	0.90%	\$8,842	0.84%
Continuing Education / Travel	\$2,618	0.27%	\$2,286	0.23%	\$2,660	0.25%
Dues / Subscriptions	\$1,272	0.13%	\$1,336	0.14%	\$1,385	0.13%
Service Agreements	\$9,199	0.96%	\$10,691	1.09%	\$12,193	1.15%
Golf Course Accessories	\$6,618	0.69%	\$6,437	0.66%	\$7,051	0.67%
Office and Building Supplies	\$2,649	0.28%	\$2,718	0.28%	\$3,121	0.30%
Water (27.9 % Purchased Water)	\$56,483	5.88%	\$55,837	5.70%	\$72,798	6.88%
Overseeding (37.9% Overseeded)	\$9,189	0.96%	\$9,917	1.01%	\$11,293	1.07%

Averages for water and overseeding only include respondents that indicate they purchase water or overseeded

Table 28 Average 18-hole maintenance budget for the Southeast region

The 18-Hole Golf Course Budget by Region (continued)

Average 18-Hole Maintenance Budget for the Northeast Region						
	2019		2020		2021	
	Actual		Actual		Budget	
Line Items						
Labor	\$491,919	59.83%	\$470,735	57.44%	\$519,257	59.08%
Power Irrigation	\$8,451	1.03%	\$10,751	1.31%	\$9,123	1.04%
Utilities Maintenance Building	\$9,655	1.17%	\$10,728	1.31%	\$11,034	1.26%
Equipment Lease Expense	\$30,205	3.67%	\$31,197	3.81%	\$33,220	3.78%
Repair / Maintenance Equipment	\$35,000	4.26%	\$34,015	4.15%	\$34,595	3.94%
Fertilizer	\$32,556	3.96%	\$33,614	4.10%	\$34,213	3.89%
Herbicides	\$7,140	0.87%	\$7,069	0.86%	\$7,796	0.89%
Fungicides	\$58,567	7.12%	\$60,523	7.38%	\$64,048	7.29%
Insecticides	\$10,221	1.24%	\$10,335	1.26%	\$11,489	1.31%
Growth Regulators	\$5,526	0.67%	\$5,808	0.71%	\$5,865	0.67%
Wetting Agents	\$6,751	0.82%	\$7,222	0.88%	\$7,760	0.88%
Fuel and Lubricants	\$20,222	2.46%	\$18,839	2.30%	\$20,582	2.34%
Small Tools	\$3,768	0.46%	\$3,632	0.44%	\$3,875	0.44%
Equipment Rental	\$2,318	0.28%	\$2,256	0.28%	\$2,697	0.31%
Irrigation Repairs and Maintenance	\$9,346	1.14%	\$9,776	1.19%	\$9,504	1.08%
Refuse / Waste Removal	\$2,163	0.26%	\$2,132	0.26%	\$4,992	0.57%
Sand / Soil	\$17,465	2.12%	\$16,016	1.95%	\$19,598	2.23%
Seed / Sod / Sprigs	\$6,433	0.78%	\$6,165	0.75%	\$6,929	0.79%
Continuing Education / Travel	\$2,906	0.35%	\$2,151	0.26%	\$2,858	0.33%
Dues / Subscriptions	\$1,532	0.19%	\$1,445	0.18%	\$1,613	0.18%
Service Agreements	\$9,684	1.18%	\$9,562	1.17%	\$8,949	1.02%
Golf Course Accessories	\$5,991	0.73%	\$5,179	0.63%	\$5,939	0.68%
Office and Building Supplies	\$2,037	0.25%	\$2,009	0.25%	\$2,150	0.24%
Water (25.6 % Purchased Water)	\$42,306	5.15%	\$58,432	7.13%	\$50,823	5.78%
Overseeding (0.0% Overseeded)	\$0	0.00%	\$0	0.00%	\$0	0.00%

Averages for water only include respondents that indicate they purchase water, not enough respondents overseeded turf to make a statistical representation

Table 29 Average 18-hole maintenance budget for the Northeast region

SURVEY DEMOGRAPHICS

Several of the demographic questions had a response rate below the statistical threshold for the region of Hawaii and outside the United States. For this reason, these geographic regions will be omitted on the tables to follow.

Type of Facility by Region								
	Overall	Pacific	Upper West-Mountain	Southwest	North Central	Transition	Southeast	Northeast
Municipal	16.7%	29.7%	26.7%	10.4%	27.6%	10.9%	11.9%	7.9%
Semi-Private	18.0%	5.4%	24.0%	8.3%	10.8%	24.4%	21.1%	15.1%
Private	45.8%	32.4%	26.7%	52.1%	38.9%	49.4%	50.3%	62.7%
Daily Fee	19.5%	32.4%	22.7%	29.2%	22.7%	15.4%	16.8%	14.3%

Table 30 2020 type of facility by region

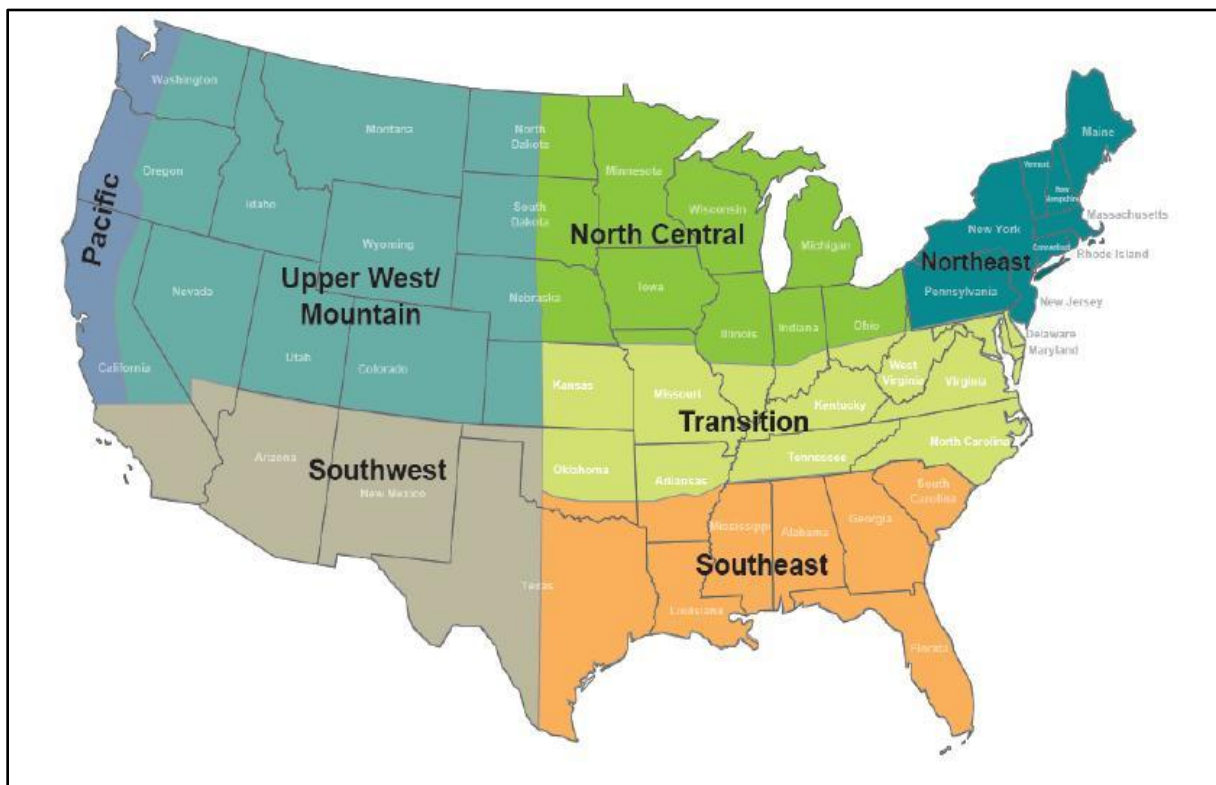


Figure 1 Agronomic regions use for identification of respondents, Alaska included in Pacific region, Hawaii reported as its own region

Survey Demographics (continued)

2021 Respondents by Region	
Region	Percent of Total Respondents
Pacific	4.4%
Upper West / Mountain	8.9%
Southwest	5.7%
North Central	22.1%
Transition	18.6%
Southeast	22.1%
Northeast	15.0%
Hawaii	0.2%
Not in USA	3.0%

Table 31 Respondents by region

Table 32 indicates the average peak-season green fee including golf cart rental; private clubs reported guest fee with golf cart rental. Nationwide, average green fee / guest fee with golf cart is \$84.66 compared to \$82.12 reported in the 2018 GCSAA Budget Survey.

Peak Season Green Fee (including golf cart) Per Year by Facility Type					
	Overall	Municipal	Semi-Private	Private	Daily Fee
Less Than \$40	7.7%	15.2%	9.3%	1.6%	14.0%
\$40 - \$55	20.9%	54.3%	22.5%	5.9%	25.6%
\$56 - \$70	15.7%	17.4%	25.8%	8.2%	22.0%
\$71 - \$85	12.4%	6.5%	15.2%	12.8%	14.0%
\$86 - \$100	12.3%	2.9%	6.0%	18.6%	11.6%
More Than \$100	31.0%	3.6%	21.2%	52.9%	12.8%

Table 32 2020 peak season cost of green fee / guest fee by facility type

Peak Season Green Fee (including golf cart) Per Year by Region									
	Overall	Pacific	Upper West-Mountain	Southwest	North Central	Transition	Southeast	Northeast	Not in USA
Less Than \$40	7.7%	2.8%	4.0%	4.3%	8.7%	12.9%	8.2%	5.6%	0.0%
\$40 - \$55	20.9%	19.4%	24.0%	12.8%	32.1%	25.2%	15.9%	7.3%	16.7%
\$56 - \$70	15.7%	30.6%	16.0%	6.4%	17.4%	16.1%	13.2%	16.1%	12.5%
\$71 - \$85	12.4%	16.7%	17.3%	4.3%	10.9%	9.7%	15.9%	13.7%	4.2%
\$86 - \$100	12.3%	8.3%	12.0%	17.0%	10.9%	11.6%	12.1%	16.9%	4.2%
More Than \$100	31.0%	22.2%	26.7%	55.3%	20.1%	24.5%	34.6%	40.3%	62.5%

Table 33 2020 peak season cost of green fee / guest fee by region

Survey Demographics (continued)

Overall, 10 respondents answered that they had less than 5,000 rounds, 12 respondents reported they had rounds greater than 60,001 during 2020.

Rounds Per Year By Region									
Rounds	Overall	Pacific	Upper West-Mountain	Southwest	North Central	Transition	Southeast	Northeast	Not in USA
Less Than 12,000	6.9%	2.7%	10.7%	13.0%	4.9%	8.4%	5.0%	4.8%	20.0%
12,000 - 17,000	13.2%	2.7%	13.3%	6.5%	17.5%	10.3%	9.4%	23.4%	4.0%
17,001 - 25,000	29.1%	8.1%	24.0%	13.0%	32.2%	31.6%	24.4%	45.2%	24.0%
25,001 - 35,000	27.4%	18.9%	25.3%	21.7%	29.5%	32.9%	30.6%	17.7%	32.0%
35,001 - 50,000	18.1%	37.8%	24.0%	26.1%	15.3%	16.1%	21.1%	8.9%	16.0%
Greater Than 50,000	5.2%	29.7%	2.7%	19.6%	0.5%	0.6%	9.4%	0.0%	4.0%

Table 34 2020 rounds per year by region

The question asked was, “Approximately, how many acres on your golf course are maintained turf? (Greens, Tees, Fairways, Roughs, Practice Areas, Turf Nursery and Clubhouse Grounds.)” Total budget expenses were divided by acres maintained, Tables 35 and 36 illustrate these findings.

Total Acres of Maintained Turf by Region									
Acres	Overall	Pacific	Upper West-Mountain	Southwest	North Central	Transition	Southeast	Northeast	Not in USA
75 or Less	13.4%	8.1%	17.4%	20.7%	8.0%	10.2%	14.1%	16.8%	36.0%
76 - 100	32.9%	51.4%	48.0%	39.6%	21.1%	30.1%	39.7%	28.8%	20.0%
101 - 125	23.2%	21.6%	18.7%	18.8%	23.8%	23.1%	27.2%	22.4%	20.0%
126 - 150	15.9%	16.2%	9.3%	4.2%	22.7%	21.2%	9.8%	18.4%	8.0%
151 - 175	5.9%	0.0%	4.0%	2.1%	11.4%	4.5%	3.3%	8.0%	0.0%
176 - 200	4.9%	2.7%	0.0%	10.4%	8.6%	6.4%	3.3%	1.6%	4.0%
201 - 250	2.6%	0.0%	1.3%	4.2%	2.2%	3.9%	1.6%	3.2%	8.0%
Greater Than 250	1.2%	0.0%	1.3%	0.0%	2.2%	0.6%	1.1%	0.8%	4.0%

Table 35 2020 acres of maintained turf by region

Regional Golf Course Maintenance Expenditures by Acre									
	Overall	Pacific	Upper West-Mountain	Southwest	North Central	Transition	Southeast	Northeast	
Actual 2019	\$ 6,741	\$ 11,583	\$ 6,066	\$ 10,252	\$ 4,673	\$ 6,141	\$ 8,036	\$ 7,337	
Actual 2020	\$ 6,729	\$ 11,769	\$ 6,252	\$ 10,260	\$ 4,622	\$ 6,270	\$ 8,088	\$ 7,054	
Budgeted 2021	\$ 7,107	\$ 12,303	\$ 6,679	\$ 10,613	\$ 4,731	\$ 6,565	\$ 8,651	\$ 7,679	
Average	\$ 6,859	\$ 11,885	\$ 6,332	\$ 10,375	\$ 4,675	\$ 6,325	\$ 8,258	\$ 7,356	

Table 36 Regional golf maintenance expenditures by acre

Tables 37 through 40 illustrate total gross revenues by types of golf facilities.

Survey Demographics (continued)

Municipal 18-Hole Facility Gross Revenue by Region								
Gross Revenue Range	Overall	Pacific	Upper West-Mountain	Southwest	North Central	Transition	Southeast	Northeast
\$500,000 or Less	17.4%	0.0%	26.3%	25.0%	12.5%	20.0%	20.0%	40.0%
\$500,001-\$1,000,000	28.0%	0.0%	15.8%	0.0%	35.4%	73.3%	15.0%	10.0%
\$1,000,001-\$1,500,000	25.8%	33.3%	31.6%	0.0%	25.0%	0.0%	40.0%	30.0%
\$1,500,001-\$2,000,000	13.6%	8.3%	15.8%	50.0%	14.6%	0.0%	15.0%	10.0%
\$2,000,001-\$2,500,000	6.8%	16.7%	5.3%	25.0%	6.3%	0.0%	5.0%	10.0%
\$2,500,001-\$3,000,000	2.3%	0.0%	5.3%	0.0%	2.1%	6.7%	0.0%	0.0%
Greater than \$3,000,000	6.1%	41.7%	0.0%	0.0%	4.2%	0.0%	5.0%	0.0%

Table 37 2020 municipal 18-hole facility gross revenue by region

Semi-Private 18-Hole Facility Gross Revenue by Region								
Gross Revenue Range	Overall	Pacific	Upper West-Mountain	Southwest	North Central	Transition	Southeast	Northeast
\$500,000 or Less	13.0%	0.0%	11.1%	25.0%	10.0%	17.1%	13.5%	10.5%
\$500,001-\$1,000,000	29.5%	0.0%	16.7%	0.0%	55.0%	34.3%	16.3%	47.4%
\$1,000,001-\$1,500,000	18.5%	33.3%	27.8%	0.0%	30.0%	17.1%	13.5%	15.8%
\$1,500,001-\$2,000,000	13.7%	0.0%	16.7%	25.0%	5.0%	11.4%	16.2%	10.5%
\$2,000,001-\$2,500,000	0.7%	33.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
\$2,500,001-\$3,000,000	10.3%	0.0%	5.6%	25.0%	0.0%	11.4%	16.2%	10.5%
Greater Than \$3,000,000	14.4%	33.3%	22.2%	25.0%	0.0%	8.6%	24.3%	5.3%

Table 38 2020 semi-private 18-hole facility gross revenue by region

Private 18-Hole Facility Gross Revenue by Region								
Gross Revenue Range	Overall	Pacific	Upper West-Mountain	Southwest	North Central	Transition	Southeast	Northeast
\$1,000,000 or Less	11.5%	0.0%	22.2%	9.5%	15.2%	9.6%	11.4%	6.9%
\$1,000,001-2,000,000	16.4%	25.0%	5.6%	19.0%	19.7%	16.4%	13.9%	18.1%
\$2,000,001-3,000,000	16.7%	25.0%	5.6%	9.5%	21.2%	21.9%	12.7%	16.7%
\$3,000,001-\$4,000,000	14.4%	25.0%	22.2%	4.8%	13.6%	16.4%	8.9%	19.4%
\$4,000,001-\$5,000,000	12.7%	0.0%	5.6%	9.5%	12.1%	12.3%	22.8%	5.6%
\$5,000,001-\$6,000,000	6.3%	0.0%	0.0%	9.5%	4.5%	6.8%	3.8%	11.1%
\$6,000,001-\$7,000,000	6.6%	0.0%	5.6%	9.5%	3.0%	5.5%	7.6%	11.1%
\$7,000,001-\$8,000,000	6.3%	25.0%	11.2%	14.3%	4.5%	5.5%	3.8%	5.6%
Greater Than \$8,000,000	8.9%	0.0%	22.2%	14.3%	6.1%	5.5%	15.2%	5.6%

Table 39 2020 private 18-hole facility gross revenue by region

Survey Demographics (continued)

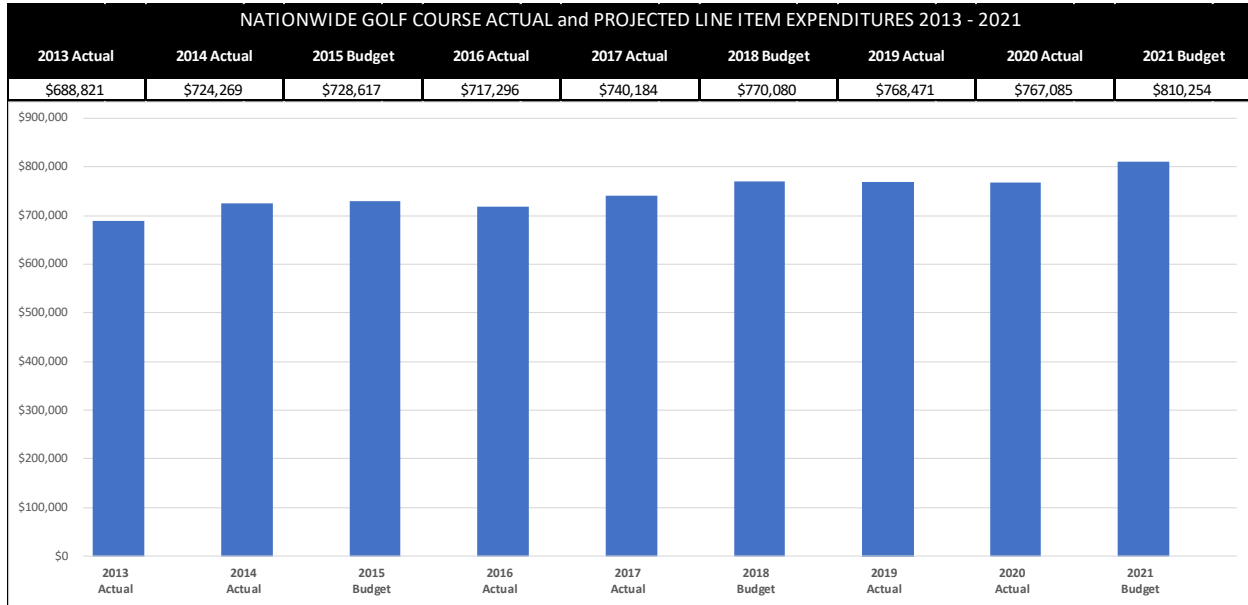
Daily Fee 18-Hole Facility Gross Revenue by Region								
Gross Revenue Range	Overall	Pacific	Upper West-Mountain	Southwest	North Central	Transition	Southeast	Northeast
\$1,000,000 or Less	39.5%	0.0%	66.7%	15.4%	52.6%	59.1%	27.6%	17.6%
\$1,000,001-2,000,000	38.2%	46.2%	20.0%	30.8%	39.5%	22.7%	51.7%	58.8%
\$2,000,001-3,000,000	9.2%	15.4%	6.7%	7.7%	5.3%	18.2%	6.9%	5.9%
\$3,000,001-\$4,000,000	5.3%	23.1%	0.0%	0.0%	2.6%	0.0%	6.9%	11.8%
\$4,000,001-\$5,000,000	2.6%	0.0%	6.7%	15.4%	0.0%	0.0%	0.0%	5.9%
\$5,000,001-\$6,000,000	2.0%	0.0%	0.0%	23.1%	0.0%	0.0%	0.0%	0.0%
\$6,000,001-\$7,000,000	1.3%	7.7%	0.0%	0.0%	0.0%	0.0%	3.4%	0.0%
\$7,000,001-\$8,000,000	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Greater Than \$8,000,000	2.0%	7.7%	0.0%	7.7%	0.0%	0.0%	3.4%	0.0%

Table 40 2020 daily fee 18-hole facility gross revenue by region

ADDENDUM I

Total budget expenditure comparisons by year, from the 2015 GCSAA Maintenance Budget Survey and current 2021 GCSAA Maintenance Budget Survey:

Please note, the 2013, 2014 and 2015 data below is from the 2015 GCSAA Maintenance Budget Survey. Respondents were asked to report actual expenditures for 2013, 2014, 2016, 2017, 2019, and 2020, and a budget projection for 2015, 2018, and 2021. Nationwide, overall golf maintenance expenditures increased by 10.2% in the eight years, from 2013 actual to 2020 actual.



Graph 1 Nationwide golf course actual and projected total golf maintenance expenditures 2013 - 2021

-END OF REPORT-



Golf Course Superintendents Association of America
1421 Research Park Drive
Lawrence, KS 66049