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ADVISORS

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RESEARCH AND INSIGHTS FROM THE LEADING ADVISORS IN GOLF

DECEMBER 2013

2013 Holiday Wish-List for Club Managers

Survey Results



GLOBAL GOLF
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2013 HOLIDAY WISH-LIST SURVEY

Happy Holidays!

At GGA we're all about giving and are always listening keenly to the needs of our clients. During this holiday season we decided to take a more light-hearted approach to our 'Pulse' survey: We investigated the holiday wish-lists of various club managers across the globe. This paper highlights the survey results.

PARTICIPANTS

GGA received 179 completed surveys from key executives and managers directly involved with club management. The participants hold club management positions listed below:

- General Manager
- Chief Executive Officer (CEO)
- Chief Operating Officer (COO)

The participant draw for 12 Swiss Army utility knives representing the twelve days of Christmas – a gift to help tackle every challenge that befalls you at your club – was held in the GGA offices on December 5th. Congratulations to the winners and thank you to everyone for their participation:

1. Mr. William J. Budion, Austin Country Club
2. Mr. Benjamin W. Peck, Sawgrass Country Club
3. Mr. Robert J. Gusella, Belle Haven Country Club
4. Ms. Susan Schenkel, Woodstock Club
5. Mr. Colin Mack-Allen, Travistock Country Club
6. Ms. Jill R. Philmon, Ballantyne Country Club
7. Mr. Gavin Speirs, Twin Orchard Country Club
8. Mr. Jim Butler, Grey Oaks Country Club
9. Mr. Thomas J. Noyes, Spring Island
10. Mr. Christopher L. Welles, Willow Oaks Country Club
11. Mr. Timothy A. Walker, Glendora Country Club
12. Mr. Charles Torrance, Burning Tree Country Club





EXECUTIVE SUMMARY

Contrary to the beliefs of many club members, the survey results indicate that club managers are *not* superhuman, iconic heroes but rather human beings just like everyone else at the club. However a major difference that club managers experience on a daily basis is the sheer volume of challenges, obstacles, requests, and areas of expertise that need to be addressed. Even during the coming holidays when most folks are taking time off to go on vacation or spend time with family, club managers are working around the clock to host events and parties for their members while continuing to run a business: the club.

Club managers are constantly listening to the wants of others, spending their days serving the needs of their members, board, employees, and families. Infrequently does a club manager get asked what they want, so we took the opportunity at this time of year to poll various managers on items and services that they wish for as well as resolutions that they seek to achieve and maintain throughout the coming year.

The results told interesting tales of the character and psyche of a club manager. The results indicate that this is a very devoted and conscientious bunch that is always looking for ways to improve their club, often at the expense of personal gain. This point is reinforced by the fact that selling new memberships is the single most important wish of many club managers. While they strive to provide the greatest service for the greatest amount of members for the greatest amount of time; it is more important to increase the member base for long term gain than it is to do immediate fix-its or take much needed time off. Membership truly is the lifeblood of every club.

The following trends and key takeaways were unmistakable in the results:

- Selling memberships is at the top of most club managers' wish-lists.
- Hiring more staff and increasing operating budgets are also at the top of most club managers' wish-lists.
- Increased giving was a top priority for club managers who, if they could, elected to give bigger bonuses to their staff and more personal time to their family.
- The challenge of showing members the complexity and sophistication required to run a club as a business while simultaneously trying to please all of the members.
- For 2014, most club managers are resolved to increase membership sales and address deferred capital maintenance issues in order to maintain club value and ideally increase operating budgets.



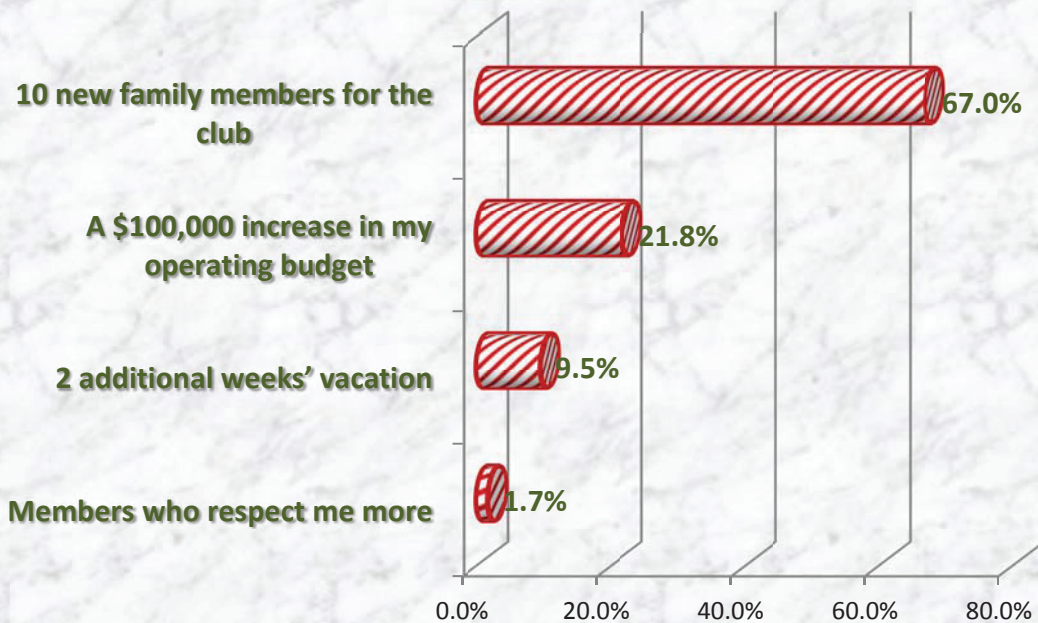


SURVEY QUESTIONS

Q. WHAT WOULD YOU LIKE TO RECEIVE THE MOST THIS HOLIDAY SEASON?

Club managers were asked to choose from a list of four (4) options described in the chart below. Almost two in three (67%) managers' prefer to receive 10 new family members for the club compared to a \$100,000 increase in their operating budget (22%), 2 weeks' additional vacation time (10%), or more respect from their members (2%).

The Gift Club Managers Would Like to Receive Most This Holiday Season



Source: GGA 2013 Holiday Wish List Survey

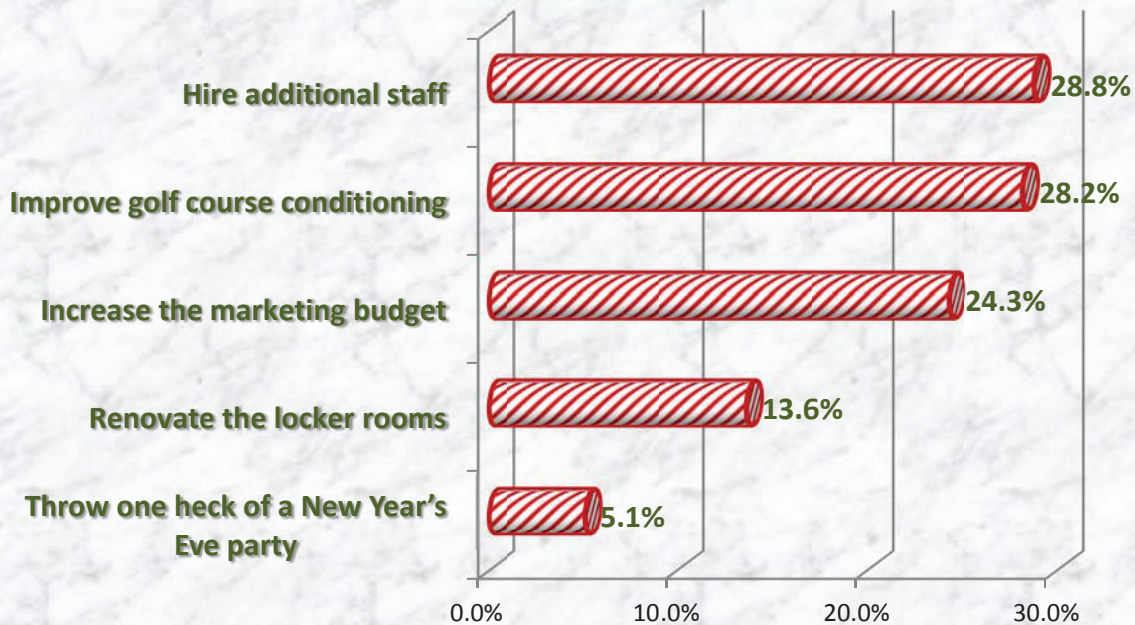




Q. IF YOU FOUND \$100,000 IN YOUR STOCKING, HOW WOULD YOU SPEND IT?

Club managers were asked to choose from a list of five (5) options described in the chart below. The most popular answer, by 'Rudolph's nose' and at only 29%, was to hire additional staff with their stocking money. A very close second at 28% was to improve golf course conditioning. In third place, at 24% was to increase the marketing budget. Locker room renovations and throwing one heck of a New Year's Eve party rounded out the fourth and fifth spots.

Most Popular Way Club Managers Would Spend \$100,000 if Found in Their Stocking



Source: GGA 2013 Holiday Wish List Survey

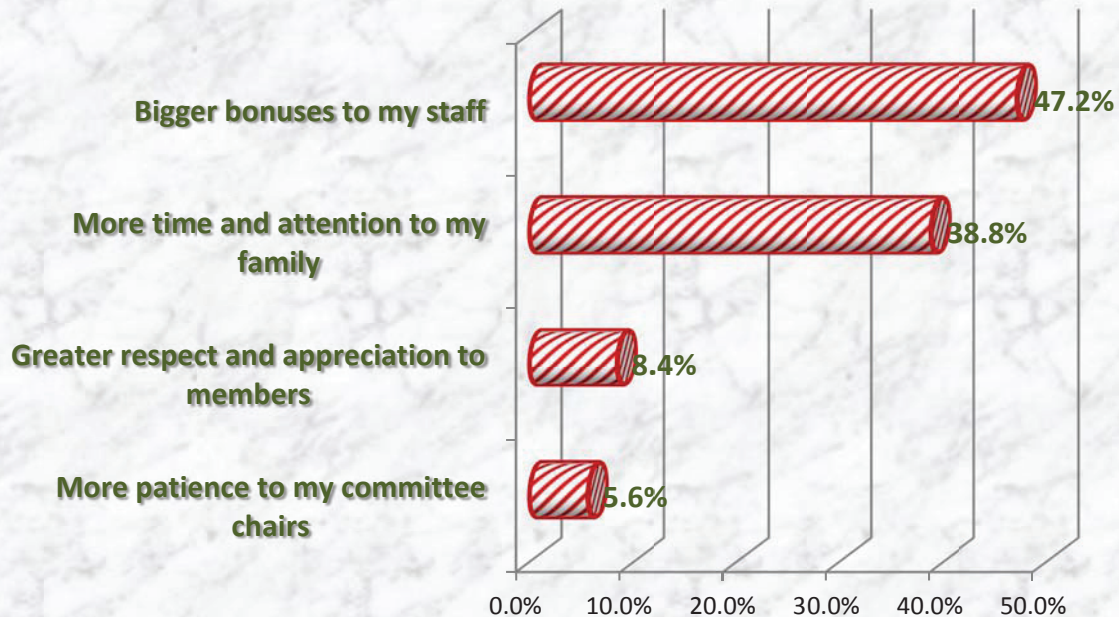




Q: WHAT ONE GIFT WOULD PLEASE YOU MOST TO GIVE?

The gift that would please club managers the most to give, when asked to choose from the list of four choices shown in the chart below, is a bigger bonus to their staff (47%). Second on the list was more time and attention to their families (39%). The bottom two choices were giving greater respect and appreciation to members (8%), and more patience to committee chairs (6%).

The Gift That Would Please Club Managers The Most to Give



Source: GGA 2013 Holiday Wish List Survey





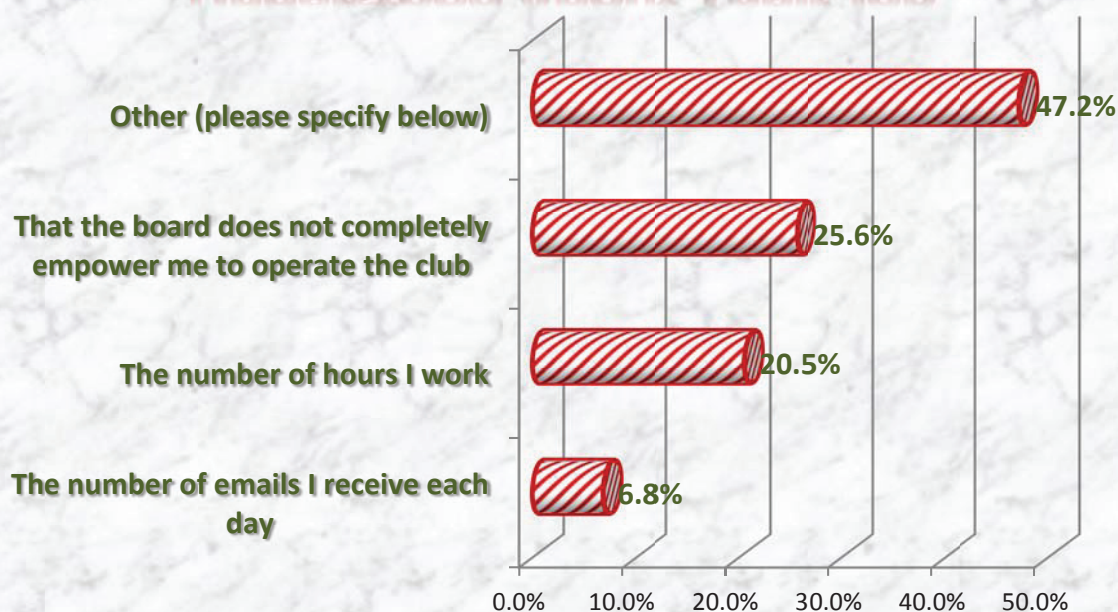
Q: WHAT'S ONE THING YOU WISH YOUR MEMBERS UNDERSTOOD ABOUT YOUR JOB?

Nearly half (47%) of club managers opted to specify something 'Other' than the three options provided. The most popular responses specified under the 'Other' category related to:

1. 'The challenge of balancing the wants and needs of the masses' (approximately 12% of the total responses).
2. 'The complexity of juggling all of the financial and operational priorities' (approximately 7% of the total responses).
3. 'The number of areas that you are required to be expert in and the number of different hats that you must wear' (approximately 4% of the total responses).

The most popular answer responses were 'that the board does not completely empower you to operate the club' (26%), followed by 'the number of hours you work' (21%), and lastly 'the number of emails received each day' (7%).

Most Popular Thing Club Managers Wish Members Understood About Their Job



Source: GGA 2013 Holiday Wish List Survey





The following answers were specified by the club managers that selected 'Other':

- Club Governance is about making decisions for the betterment of the Club overall and not for individual constituencies.
- Nothing; that's why they have hired me, not to gripe.
- The challenge of attracting full golf members in this economy.
- Balancing the wants of the various "tribes" for the greater good of the Club.
- The importance of their support in their presence, purchases and comments.
- The complexities of treating each member as if they were the sole owner of the Club.
- The challenges of meeting the needs, wants and desires of a diverse membership.
- Their concerns are not the only concerns related to the Club.
- That I strive to give them the best possible Club for them to enjoy!
- How much we care, which most of them do.
- That it is something I love to do, every day.
- The number of hours everyone works to make the Club what it is.
- That I have to deal with so many challenging personalities.
- We need more money.
- How difficult it is to balance the needs of each member's wants and desires as well as those of the employees.
- We can't give everyone everything they want for next to nothing.
- Balancing wants, needs, and resources does not mean that I don't want to act on your suggestions.
- How many priorities are juggled.
- That it is a "can't win," damned-if-you do-and-damned-if you-don't position.
- The multifaceted array of issues and challenges facing the golf club business.
- How large the scope of operation is.
- The vast variety of subjects I am expected to be knowledgeable on.
- The idea of trying to please most/if not all membership and staff with each decision made.
- How much we truly care about them even if they aren't always nice.
- Complexities of a club.
- It is my job to manage, the board's job to govern.
- That we strive for perfection, but we won't be perfect every time.
- The Club's overall diversity.
- That not everything is as easy as they perceive it to be.
- That the board DOES completely empower me to operate the Club.
- How hard my team works every day.





- Every day challenges.
- Complexity.
- All the different hats I have to wear.
- That getting their support on all aspects of the Club in order to make it successful is vital.
- The number of emails I receive and how many different opinions members have.
- The constant strain of the job.
- The difficulty in respecting the competing desires of other members.
- The level of responsibility that comes with the job.
- The politics of the job.
- The complexity of the job.
- The difficulty of accommodating everyone, all of the time.
- That there is always more to a decision that meets the eye.
- What a great Club they have!
- How much fun it is.
- The many challenges to keep members and staff happy.
- The complexity of satisfying different age and gender groups with the same amenities.
- How effective a phone call or e-mail could be to discuss something with me, versus a meeting that ends up taking far too much time.
- The number of direct reports I have.
- How complex the job can be from operating as a business to keeping the staff happy and appreciative.
- That the choices that we make are based often on budget not desire to please.
- That the Club needs to be run like a business not a church.
- That they are 1 of 500 and we can't do for one what we can't do for 500.
- How grateful I am to be working at the Club.
- The complicated nature of the Club business and the experience, planning, training and energy it takes to keep it all together!
- That we do care about their needs and if we cannot grant their requests, there is good reason.
- That everything we do is with the mindset of providing an improved Club experience for them.
- That I can't please all the people all the time.
- The effects of the seasonality of our Club.
- How to be good members and respect staff back.
- The number of different and varying things I'm expert at.
- The amount of time spent on analysis paralysis that never gets reviewed.
- How many different situations I handle.
- I am the expert just as they are the expert in their profession.





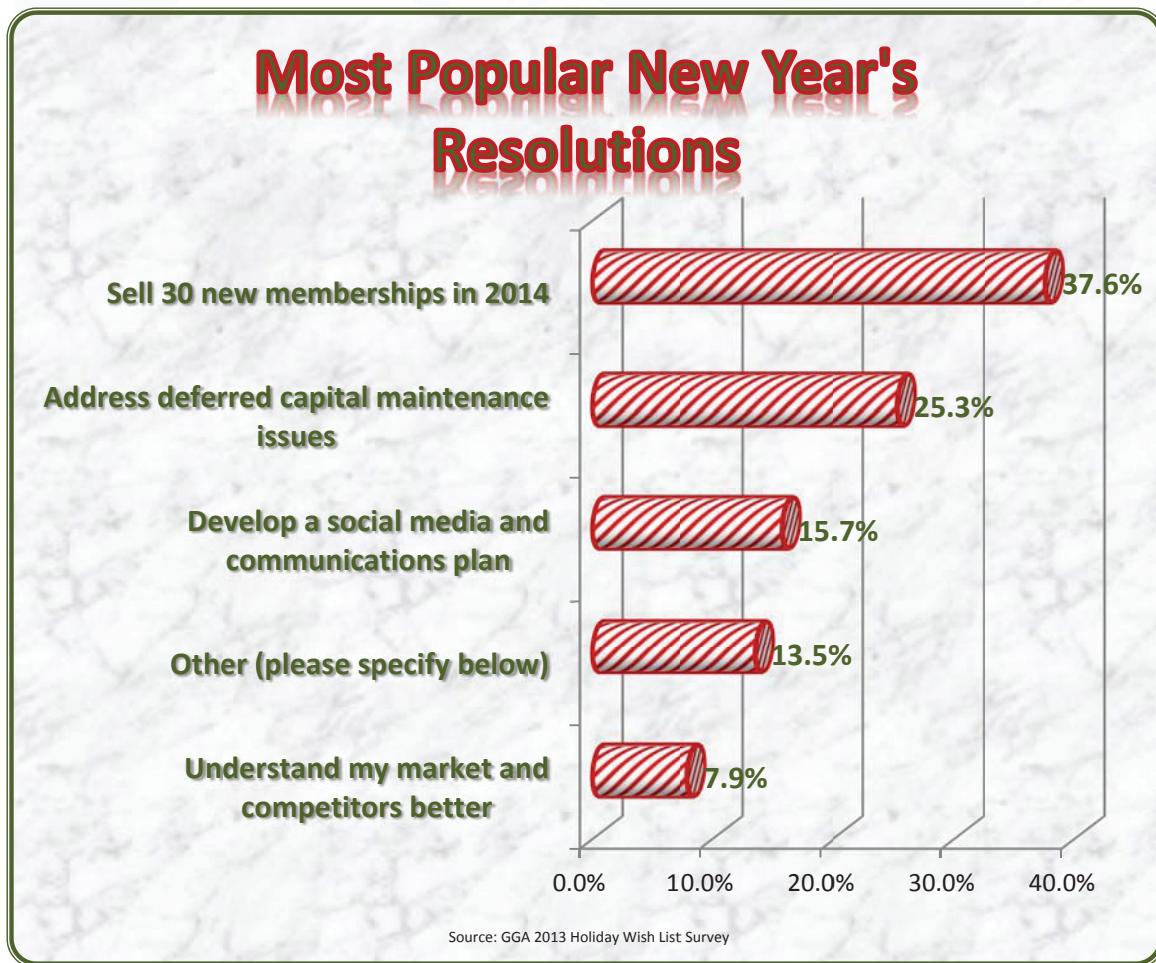
- That I love it!
- The difficulty I have being fair to each and every one of them without favoritism.
- How much fun it really is.
- That decision making is about them and their best interests.
- It's not always me.
- More respect will get you what you want.
- That the Club is a business.
- The many hats that are worn and fires that are put out.
- Everyone has an opinion and I have to make decisions based on the best interest of the club. I can't make everyone happy.
- Mastering the Club dynamics and excelling in performance takes a huge level of commitment and expertise.
- How much I care about the organization.
- We cannot make 100% of the members happy all the time.
- They understand it.
- Even smaller operations need staff to maximize Club growth!
- The variety of requests received each day.
- The members need to enjoy the Club and not worry about understanding my job.
- That as managers we are forced to be "everything to everyone."





Q: FROM THE FOLLOWING OPTIONS, PLEASE CHOOSE ONE NEW YEAR'S RESOLUTION.

The most popular New Year's Resolution was 'to sell 30 new memberships in 2014' (38%), followed by 'addressing deferred capital maintenance issues' (25%). Interestingly, 'understand my market and competitors better' was the least popular resolution (8%), possibly indicating that the majority of club managers believe that they have this understanding sufficiently in-hand.



The following resolutions were specified by the club managers that selected 'Other':

- More one-on-one time with key department heads.
- To get a better understanding of the desires and needs of the membership.
- To create the ultimate culture.





- To devote more time to planning.
- To implement consistent board governance.
- To make the Club and our community a better place.
- To have more time with my family.
- To create a more positive environment for employees.
- Obtain full approval to go forward with major kitchen/dining/bar/youth-room project.
- Taking it up a notch!
- To continue to develop and finalize the master plan, and get it approved by the board.
- All of the above!
- Begin another strategic plan. Just accomplished one!
- Working with the staff to help increase productivity and effectiveness.
- Redesign the business model.
- Sell 30 homes WITH memberships attached. Oh, this isn't still question one?
- Spend more time with my Department Heads.
- Help staff appreciate working for such great members.
- Add a fitness center.
- Work fewer hours.
- To create, develop, and implement new orientations via video using humor posted to our site.
- To learn something new each and every day.
- Say 'bye-bye' to committees and take on CEO model.
- Find a new position.





ABOUT GLOBAL GOLF ADVISORS

Global Golf Advisors provides highly specialized consulting services to the international golf, private club, real estate, resort, and investment communities. Headquartered in Phoenix (US), Toronto (Canada) and Dublin (Ireland), GGA offers its services in five strategic categories: i) Corporate Strategy, Financial Engineering and Transaction Advisory, ii) Asset Management, iii) Performance and Operations Consulting, iv) Club Membership Programs & Solutions, and v) Strategic Marketing and Business Planning. The firm takes a 360-degree view of financial, management and operational issues before developing a strategic plan that establishes benchmarks for success and identifies potential outcomes of recommended actions. In its 20-year history, GGA has consulted on more than 2,300 golf-related projects worldwide. For more information, please visit www.globalgolfadvisors.com or call 1.888.432.9494.

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