



2016 National Trends Survey

December 2016

Gauging the Impact of National Trends on Private Clubs

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I. OVERVIEW

2010

In 2010, as part of a strategic planning project at Congressional Country Club, Michael Leemhuis – now President of the Ocean Reef Club in Key Largo, Florida and past CMAA Club Executive of the Year – challenged his planning team to confirm social and economic trends that were affecting the private club community. The team assembled a preliminary list of trends from various sources and asked an esteemed group of General Managers to identify the trends that have, or in the near future would have, the greatest impact on private clubs.

The list of trends was meticulously evaluated and refined to identify only the most prominent and potent tendencies and inclinations of the private club industry. In 2010 nearly 50 General Managers provided trend feedback, speaking to the impact these trends had on each of their respective clubs and identifying tactical actions taken to respond to them. The outcome of this exercise was a set of credible data that proved very valuable in the planning process at Congressional Country Club. To allow others to gain from the exercise, the [findings were published shortly thereafter in a winter edition of CMAA Magazine](#).

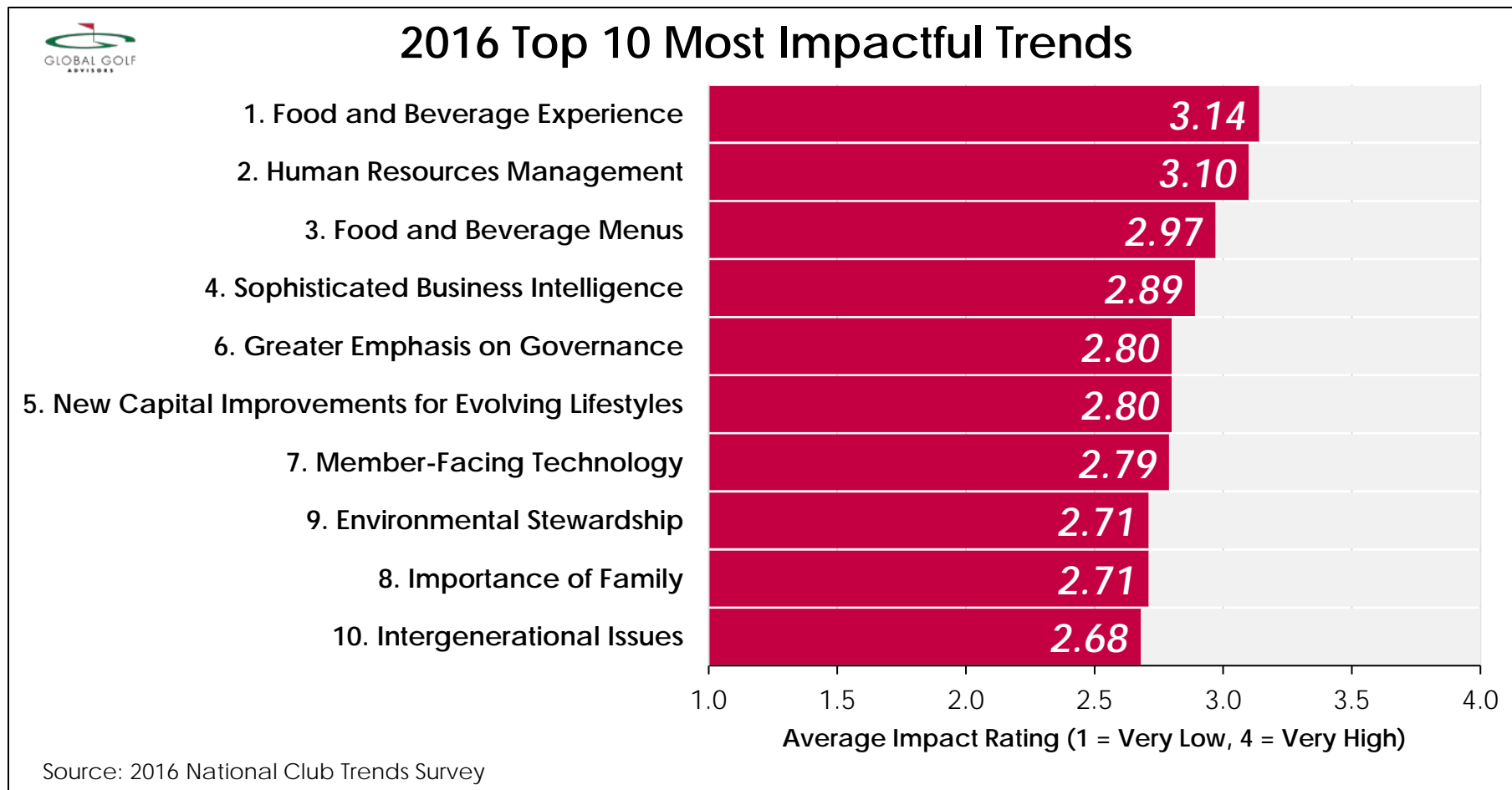


2013

The 2010 national trend findings were well-received, with many General Managers and other club leaders commenting about how the data was used in planning processes at their own organizations. Trend data was so useful for this audience that Michael was approached in 2013 and asked to revisit the trends to see if and how things had changed in just a few short years. Again the list was re-evaluated and refined to include the most current trends and most volatile changes in those from previous years. However this time a larger group of General Managers were asked to participate in the exercise, two-thirds (95 out of 145 club leaders) participated, enabling even greater data collection and more penetrating insight than the 2010 effort.

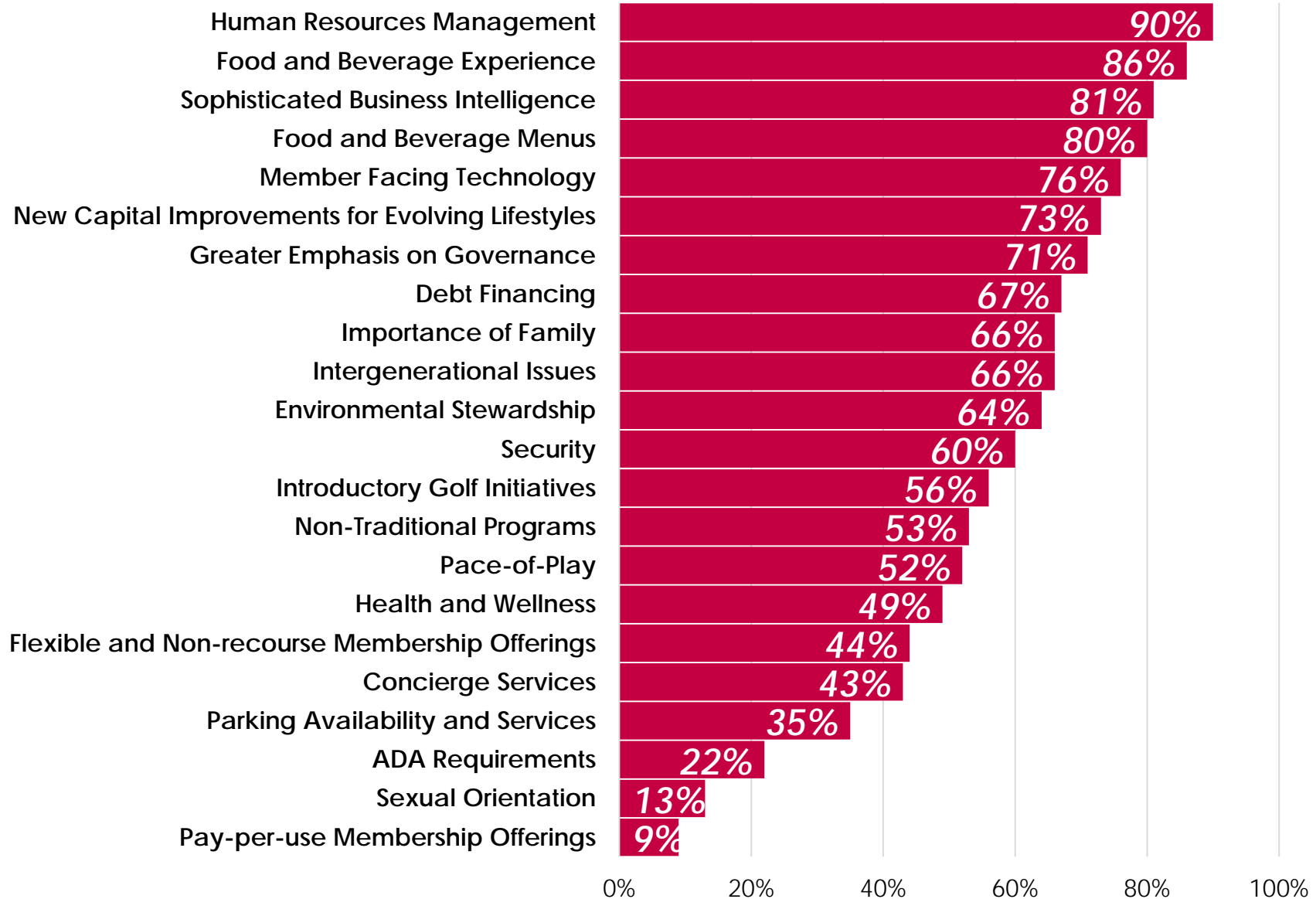
2016

As the National Club Trends survey effort continues to expand and serve the industry's prominent private club leaders, Michael Leemhuis and Fred Laughlin enlisted the guidance of Global Golf Advisors to assist in the facilitation and execution of the research component for a 2016 update on changes to key trends and the assimilation of other rapidly developing trends that will have a significant impact on private clubs. The response rate continued to climb in this year's survey, with approximately 150 out of a potential 555 General Managers sharing their insight, expertise, and concerns.





2016 Trends - Expectation of a High Impact on Clubs



Source: 2016 National Club Trends Survey

Percentage of Club Managers Rating Trend Impact as 'High' or 'Very High'



II. TRENDS SUMMARY

TOP 10 MOST IMPACTFUL TRENDS

Survey data sourced from 150 club managers at North America's elite, top-performing clubs indicates that the following trends are having the greatest impact on private clubs.

While each trend was evaluated and analyzed individually, on a stand-alone basis, it is clear that the private club landscape is (a) greatly influenced by changing food and beverage expectations, (b) challenged to manage human resources, (c) thirsty for data-driven decision-making, and (d) strategizing ways to adapt traditional club experiences to mirror changing membership demographics.

Trend	Impact Rating (4 = Very High)
1. Food and Beverage Experience	3.14
2. Human Resources Management	3.10
3. Food and Beverage Menus	2.97
4. Sophisticated Business Intelligence	2.89
5. New Capital Improvements for Evolving Lifestyles	2.80
6. Greater Emphasis on Governance	2.80
7. Member Facing Technology	2.79
8. Importance of Family	2.71
9. Environmental Stewardship	2.71
10. Intergenerational Issues	2.68

SUMMARY OF TREND IMPACT BY RATING

The table below summarizes all trends considered in the survey in order of impact.

Trend	Impact Rating (4 = Very High)
1. Food and Beverage Experience	3.14
2. Human Resources Management	3.10
3. Food and Beverage Menus	2.97
4. Sophisticated Business Intelligence	2.89
5. New Capital Improvements for Evolving Lifestyles	2.80
6. Greater Emphasis on Governance	2.80
7. Member Facing Technology	2.79
8. Importance of Family	2.71
9. Environmental Stewardship	2.71
10. Intergenerational Issues	2.68
11. Debt Financing	2.67
12. Security	2.61
13. Health and Wellness	2.51
14. Introductory Golf Initiatives	2.49
15. Non-Traditional Programs	2.43
16. Pace-of-Play	2.43
17. Concierge Services	2.39
18. Flexible and Non-recourse Membership Offerings	2.21
19. Parking Availability and Services	2.11
20. ADA Requirements	2.02
21. Sexual Orientation	1.73
22. Pay-per-use Membership Offerings	1.51

SUMMARY OF TREND IMPACT BY DEGREE

The table below summarizes all trends by degree of impact, in descending order of significance.

Trend	Degree of Impact					Impact Rating (4 = Very High)
	Very Low	Low	High	Very High	Total High	
Human Resources Management	1%	10%	69%	21%	90%	3.10
Food and Beverage Experience	3%	11%	55%	31%	86%	3.14
Sophisticated Business Intelligence	2%	17%	70%	11%	81%	2.89
Food and Beverage Menus	2%	17%	62%	18%	80%	2.97
Member Facing Technology	6%	18%	67%	9%	76%	2.79
New Capital Improvements for Evolving Lifestyles	4%	23%	62%	11%	73%	2.80
Greater Emphasis on Governance	6%	23%	57%	14%	71%	2.80
Debt Financing	20%	13%	48%	19%	67%	2.67
Importance of Family	10%	24%	51%	15%	66%	2.71
Intergenerational Issues	6%	28%	59%	7%	66%	2.68
Environmental Stewardship	6%	30%	51%	13%	64%	2.71
Security	8%	32%	50%	10%	60%	2.61
Introductory Golf Initiatives	16%	28%	47%	9%	56%	2.49
Non-Traditional Programs	19%	29%	44%	9%	53%	2.43
Pace-of-Play	16%	32%	45%	7%	52%	2.43
Health and Wellness	14%	37%	34%	15%	49%	2.51
Flexible and Non-recourse Membership Offerings	35%	21%	33%	11%	44%	2.21
Concierge Services	14%	42%	33%	10%	43%	2.39
Parking Availability and Services	31%	34%	27%	8%	35%	2.11
ADA Requirements	22%	55%	21%	1%	22%	2.02
Sexual Orientation	41%	46%	12%	1%	13%	1.73
Pay-per-use Membership Offerings	58%	33%	8%	1%	9%	1.51

III. SURVEY RESULTS AND STATISTICS

The ensuing sections summarize trend data on an individual, question-by-question basis. Each section briefly describes the trend, measures its level of impact, summarizes real-life circumstances in which it has affected clubs, and highlight tactics taken by elite clubs to address the trend. Please note, respondents were only asked follow-up questions regarding a specific trend if their impact rating was 'high' or 'very high'.

The User Guide displayed on the following page illustrates the format in which individual trends are summarized in the sections that follow.

USER GUIDE – TREND SUMMARY SECTIONS

AREA 1 DESCRIBES AND CLARIFIES THE TREND BEING SUMMARIZED.
1 DESCRIPTION
TREND TITLE

This area provides a brief description of the trend's characteristics, applications, and present influence on the private club community. Survey respondents evaluated the impact of each trend based on this description as presented in the survey questions.

2 IMPACT RATING
3 DEGREE OF IMPACT


AREAS 2 AND 3
EVALUATE THE TREND'S IMPACT AND SERVE AS A BASIS OF COMPARISON WITH OTHER TRENDS.

4 TREND IMPACT ON CLUBS
5 TACTICS TAKEN TO ADDRESS TREND IMPACT

- Open-ended feedback was solicited from General Managers to identify real-life circumstances in which the specific trend has affected their club.
- This area summarizes narrative feedback in response to the question "Briefly describe how this trend has impacted your club."

- GMs again provided open-ended feedback to identify the tactics, if any, they have taken to address the trend's impact on their club.
- This area summarizes narrative feedback in response to the question "Briefly describe the steps (if any) your club has taken or intends to take in order to address this trend."

AREAS 4 AND 5 SUMMARIZE NARRATIVE FEEDBACK FROM GMS REGARDING THE IMPACT THE TREND HAS HAD ON THEIR CLUB AND THE STEPS THEIR CLUB HAS TAKEN TO ADDRESS THIS IMPACT.

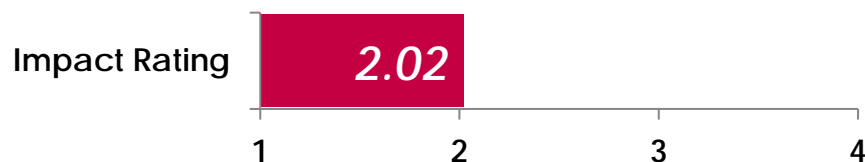
Note: respondents were only asked follow-up questions regarding the trend if their impact rating was 'high' or 'very high'.

ADA REQUIREMENTS

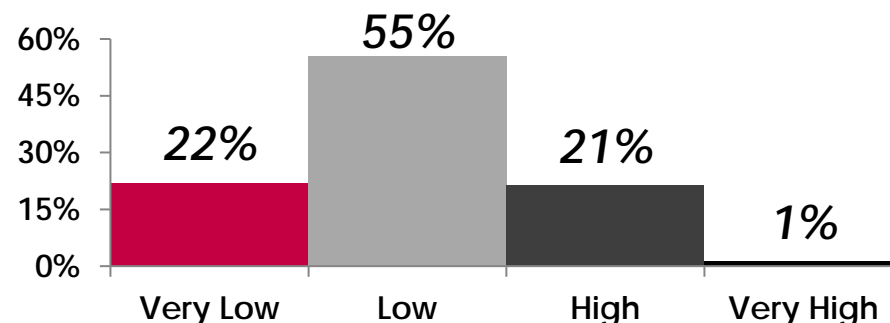
1 DESCRIPTION

The Americans with Disabilities Act is a wide-ranging civil rights law intended to protect against discrimination and disadvantage based on disability. Clubs are reviewing facility access and technological convenience to provide reasonable accommodations to members/employees with disabilities, ensuring various Club technologies (such as websites and point-of-sale systems like ClubEssential) are user-friendly and adaptable to an aging member/employee population.

2 IMPACT RATING



3 DEGREE OF IMPACT



4 TREND IMPACT ON CLUBS

- In order to grant approval for club renovations, a local municipality can mandate that certain ADA requirements must be met. In some cases, clubs do not currently meet these standards as their facilities are old, either having been built many years ago or their most recent major renovations predating the ADA law.

5 TACTICS TAKEN TO ADDRESS TREND IMPACT

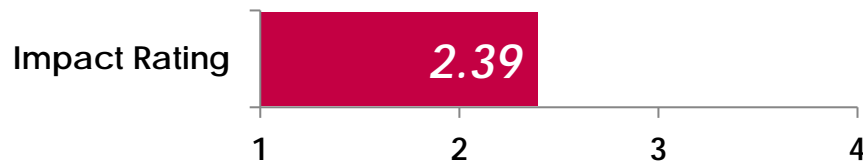
- In order to proceed, clubs are required by law to come into compliance by renovating inadequate areas of facilities, constructing appropriate means of access, or by implementing appropriate systems, procedures, or policies for employees and guests.
- Clubs have hired professional architectural design firms as consultants to research all options relevant to their area and advise their decision.

CONCIERGE SERVICES

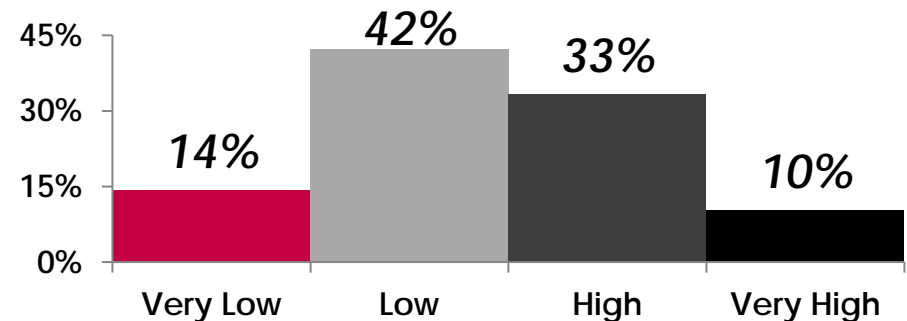
1 DESCRIPTION

To increase service quality, clubs are enhancing their capacity for member services relating to information, errands, arrangements, and accommodations. Concierge services are characterized by responsiveness, personalization, professionalism, positive employee attitude, and 'perk' type services such as catering/chef services available to members in their homes.

2 IMPACT RATING



3 DEGREE OF IMPACT



4 TREND IMPACT ON CLUBS

- ▣ Clubs are pressured to deliver service quality commensurate to services received when members travel.
- ▣ Members seek tangible services that add or enhance the value of their membership.
- ▣ Members have an increasing desire to receive personalized service that feels customized and special to their circumstance.

5 TACTICS TAKEN TO ADDRESS TREND IMPACT

- ▣ Clubs that have experimented with customized, personal service have seen high member interest in these services.
- ▣ Hired and trained dedicated full-time resources to service members, such as a Member Services Team, Concierge, Club Services, or Valet Department. Clubs expect the demand for such staff to grow.
- ▣ Offered enhanced F&B offerings such as in-home dining, take-out/delivery, or pantry-style stores. Some reported that these services generated 15-17% of F&B revenue.

CONCIERGE SERVICES (CONTINUED)

4 TREND IMPACT ON CLUBS

- ▣ Clubs are pressured to anticipate member requests before they're asked.
- ▣ 'Service' is often perceived by members to be most tangible as it relates to food and beverage.
- ▣ Seasonal clubs, clubs with lodging or accommodations, and those connected to homeownership/communities are expected to deliver service year-round and to those who are not sporting members.

5 TACTICS TAKEN TO ADDRESS TREND IMPACT

- ▣ Built relationships with hotels, restaurants, adventure programs, theaters, and venues to offer enhanced access and discounted pricing for events, plays, meals, etc.
- ▣ Popular services include receiving/welcoming/directing members and guests upon arrival, shuttle services, landscape services, travel arrangements, and support for off-site meals and parties.

DEBT FINANCING

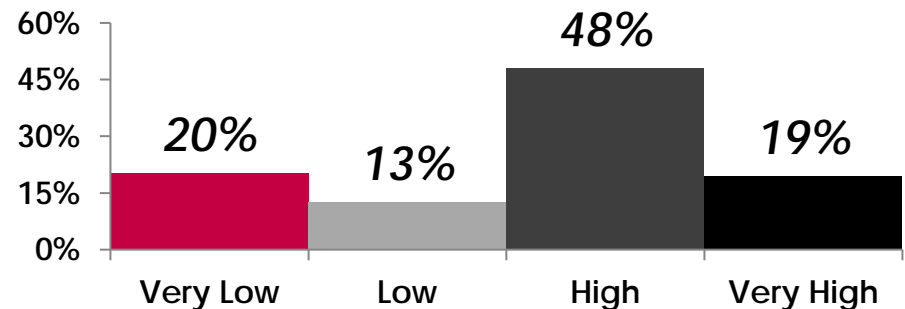
1 DESCRIPTION

Debt financing is more attractive at the moment as a result of low interest rates and capital improvement needs. The persisting low interest rate environment is encouraging clubs to finance current capital requirements through significant debt, which must be paid back in the future. Accordingly, a greater emphasis is being placed on planning to ensure the debt taken on today does not become tomorrow's burden.

2 IMPACT RATING



3 DEGREE OF IMPACT



4 TREND IMPACT ON CLUBS

- Outstanding debt obligations are having a significant impact on the long-term financial stability of some clubs and have proven to be a barrier to new capital undertakings. At some clubs projects have been voted down by members due to debt concerns.
- Historic lack of financial planning and clarity has caused missed opportunities with current favorable interest rates.
- Clubs in a 'facility race' with competitors have been forced to increase capital assessments in order to fund projects without increasing dues.

5 TACTICS TAKEN TO ADDRESS TREND IMPACT

- Clubs are future-focused, planning well ahead of due dates and executing preemptive debt pay-down programs. They have implemented policies, plans, and budgets to regularly service debt obligations and make advanced payments when possible.
- Created or retasked Finance or Long Range Planning committees to strategize options and solidify a plan. They meet regularly with the Board.
- Some Clubs are using member assessments to fund debt and, after, increase capital reserve funds for the future.

DEBT FINANCING (CONTINUED)

4 TREND IMPACT ON CLUBS

- ▣ Debt management is a controversial topic between the Board and Management in planning efforts.
- ▣ Retiring debt through new initiation fees has led to a decreasing number of new member applications.
- ▣ Member attrition has created many unknowns with regard to long-term debt services.
- ▣ A conservative approach to debt has required phased project planning rather than large-scale renovations or additions.
- ▣ Many clubs are currently borrowing due to a favorable interest environment and the access to new money has increased their ability to plan.

5 TACTICS TAKEN TO ADDRESS TREND IMPACT

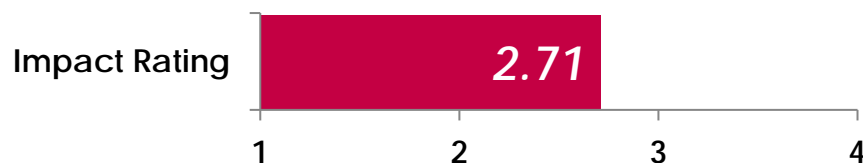
- ▣ Clubs are tracking and monitoring debt Key Performance Indicators (KPIs), reporting on a monthly basis through a Board dashboard which includes forecast modeling.
- ▣ Early-stage planning and appropriate communications have afforded clubs the ability to borrow and build at current low-rates. Some are executing long range plans using phased implementation through low-cost, long-term debt arrangements.
- ▣ Clubs carrying high debt are revising project plans and reducing their scope to better manage their responsibilities.
- ▣ Some requested multiple RFPs from local institutions, thereby creating a competitive bidding process which led to compromise and favorable borrowing rates.

ENVIRONMENTAL STEWARDSHIP

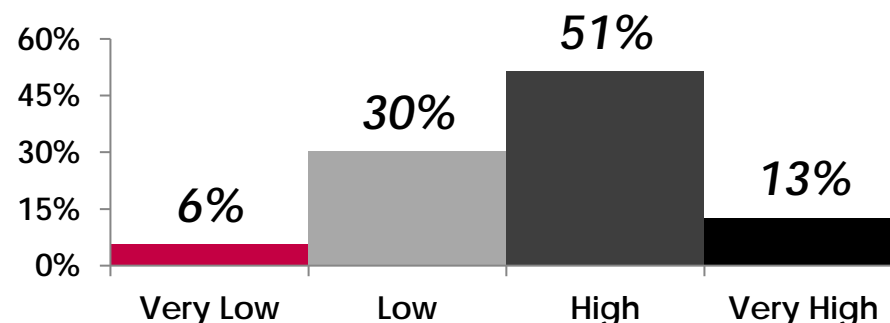
1 DESCRIPTION

Issues surrounding global warming, water quality/conservation, protecting wetlands/habitats, use of pesticides/herbicides, and other related 'green' issues are driving an increase in public concern and compliance related requirements. Clubs are taking steps to address environmental concerns, whether for marketing or compliance reasons. Many have sought environmental certifications and established methods for member education.

2 IMPACT RATING



3 DEGREE OF IMPACT



4 TREND IMPACT ON CLUBS

- ▣ Increased pressure to comply with local rules and regulations relating to mandatory composting, controlled pesticide use, recycling of construction waste, and efficient energy use have led to the need from increased education, labor training/input, and government reporting.
- ▣ Clubs are 'under the microscope' in some areas, receiving provocation from local municipalities ahead of management planning which has caused them to feel 'reactive' to growing environmental concerns.

5 TACTICS TAKEN TO ADDRESS TREND IMPACT

- ▣ Many clubs have begun seeking certifications and recognition from organizations such as Audubon International and the Green Restaurant Association.
- ▣ Clubs adopt many different means of environmental efficiency such as: changing course grass types, converting some acreage into native areas through turf-reduction programs, reducing pesticide use, conserving water through irrigation reservoirs and decreased overall use, recycling, composting, banning plastic containers and cups, buying locally, and renovating/reconstructing facilities for more conservative use of water and energy.

ENVIRONMENTAL STEWARDSHIP (CONTINUED)

4 TREND IMPACT ON CLUBS

- ▣ Members wishing to decrease clubs' carbon footprint at existing costs.
- ▣ Water conservation is a top concern, on principle, but is also very costly in many areas.

5 TACTICS TAKEN TO ADDRESS TREND IMPACT

- ▣ Adopted increased education and communication through membership information channels, town hall meetings, and meetings with the local government.
- ▣ Some have created a resource stewardship fund or on-site nature centers with hired professionals.
- ▣ Others have funded and currently operated their own water treatment facility with other local courses.

FLEXIBLE AND NON-RECOURSE MEMBERSHIP OFFERINGS

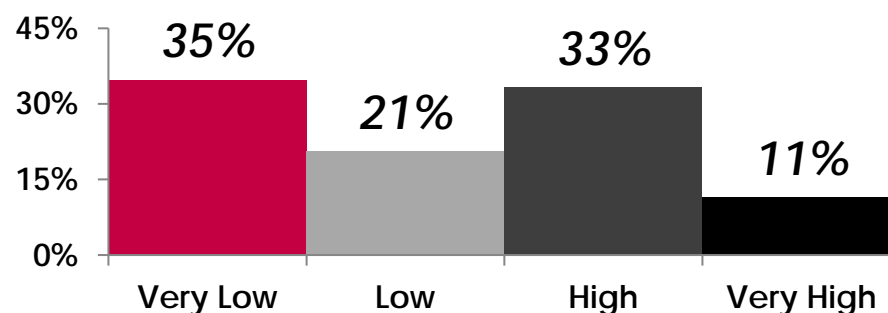
1 DESCRIPTION

Members are placing greater value on flexibility within club membership offerings. Specifically, the flexibility to join, move freely between membership categories, resign and join again 'as-desired-and-on-demand' is becoming more and more important to existing members or to potential members as they evaluate a club to join. Clubs are adjusting membership definitions, restrictions and fees to address this trend, including a move to smaller, non-refundable joining fees, and non-recourse resignations to eliminate a resign list.

2 IMPACT RATING



3 DEGREE OF IMPACT



4 TREND IMPACT ON CLUBS

- ▣ The demand for more membership classifications has led to increased difficulty of membership management and required more effort to meet dues budgets.
- ▣ Desire for alternative membership categories has influenced a review of membership classification by fees, dues, access, and privileges. The admission process for new members is being forced to adapt.
- ▣ Some clubs are seeing a developing rift between older, tenured members and new members looking for deals.

5 TACTICS TAKEN TO ADDRESS TREND IMPACT

- ▣ All clubs are revising membership categories in one way or another, either adding new categories, reducing fees, increasing or reducing privileges, changing age bands.
- ▣ Some have created new memberships such as value-priced entry level memberships based on age and course access, expanded family categories and age bands for juniors and seniors, more non-equity memberships, or trial categories.
- ▣ Some are reviewing existing categories to allow generational transfers, increased privileges for spouses and family members, or lower dues and decreased privileges.

FLEXIBLE AND NON-RECOURSE MEMBERSHIP OFFERINGS (CONTINUED)

4 TREND IMPACT ON CLUBS

- ▣ In some cases an aging membership which is transferring to social or dining categories is impacting dues revenue and overall financial stability of the club.
- ▣ Clubs are experiencing difficulty in sustaining prime joining and funding categories in a market that desires robust optionality.
- ▣ In competitive markets there has been member attrition due to more affordable pricing options offered by other local clubs.
- ▣ Some clubs have had difficulty attracting new members due to antiquated methods of resigning and selling equity memberships.

5 TACTICS TAKEN TO ADDRESS TREND IMPACT

- ▣ Others have revised rules to permit membership downgrades, adjust non-resident dues to align with rounds played, extend payment terms on joining fees, and make reinstatements more affordable.
- ▣ Some clubs are implementing multi-year plans to increase the non-refundable portion of joining fees.
- ▣ One club has focused on recruiting golfers first to attract members who immediately take golf privileges rather than others who are waiting for something to happen (i.e. their children grow up or a fitness center is built).
- ▣ Increased communication of the club as one community to prevent social fragmentation.

FOOD AND BEVERAGE EXPERIENCE

1 DESCRIPTION

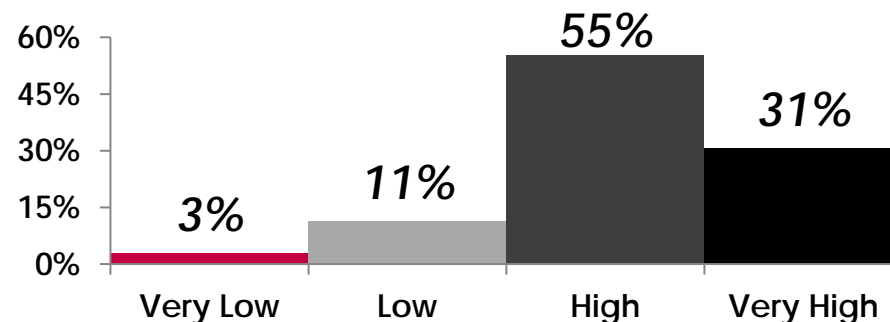
Food and Beverage facilities are being enhanced to accommodate all demographics. Change is characterized by personalization and variety: high-end and sophisticated dining atmospheres, casual and convenient bistros/lounges, and 'Starbucks' style shops as well as other alternative dining options such as fire pits, patios, and carry-out meals.

2 IMPACT RATING

Impact Rating



3 DEGREE OF IMPACT



4 TREND IMPACT ON CLUBS

- ▣ There is increased demand for numerous, multifaceted club dining outlets with a focus on casual dining. Members desire increased optionality for outlets, menus, and styles of service. Variety and fast-service are key.
- ▣ Increasingly popular are to-go/take-out dining, mixed dining, creative dining such as pizza ovens, and pub/tavern style bars.
- ▣ Clubs are compelled to execute interior redesigns and renovations to modernize their kitchens and member dining areas. Club managers believe that dining overhauls upgrade the member experience and help the club stay competitive in its market.

5 TACTICS TAKEN TO ADDRESS TREND IMPACT

- ▣ Clubs are extensively incorporating dining enhancements into their strategic planning initiatives, with dedicated taskforces (such as Facility Committees and Long Range Planning Committees) identifying and addressing changes in dining trends with a focus on operating more efficiently.
- ▣ Clubs are surveying existing members and interviewing new members to discover dining preferences and identify areas for future improvement.
- ▣ Clubs have adopted more informal, bistro-style dining with relaxed dress codes and have shifted from formal dining to adult, casual, upscale dining.

FOOD AND BEVERAGE EXPERIENCE (CONTINUED)

4 TREND IMPACT ON CLUBS

- ▣ A trend toward healthier menu selections is prevalent, though many club managers see more traditional style food items as their best sellers.
- ▣ Clubs that planned for renewed emphasis on casual dining have built facilities and services that are extremely popular and have yielded increased utilization and higher member satisfaction.
- ▣ Some clubs view their dining changes as transitional rather than traditional, meaning that a one-dining-room-fits-all type of approach has proven ineffective. Clubs are challenged to balance variety and diverse dining options with affordability, for both the club and members
- ▣ Clubs are concerned about the cost to operate multiple dining outlets simultaneously, with labor expenses required to staff all areas increasing rapidly.

5 TACTICS TAKEN TO ADDRESS TREND IMPACT

- ▣ Clubs have adapted to a shift in dining attitudes in which socialization is the primary focus and food is secondary. Clubs have developed dining areas conducive to 'hanging out' and mingling, areas such as to-go/self-serve cafeterias, fire pits, expanded patios, lounges, and Wi-Fi cafes.
- ▣ Staff changes have been required to meet changing dining demands. Clubs have hired new chefs and more full-time staff. They have expanded food and beverage payrolls/budgets to enable the club to hire more experienced, quality staff as opposed to relying on students or interns. Some clubs have created purchasing managers to facilitate local buying and control inventory costs.

FOOD AND BEVERAGE MENUS

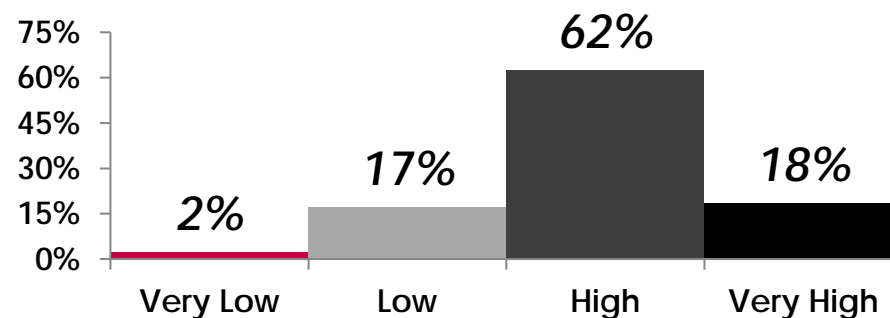
1 DESCRIPTION

More diverse menus are being offered by Clubs that include farm-to-table, organic and gluten free items as well as mixology cocktails and wine experts/sommeliers.

2 IMPACT RATING



3 DEGREE OF IMPACT



4 TREND IMPACT ON CLUBS

- ▣ Clubs that have responded positively to healthy dining trends have seen member participation increase alongside food and beverage revenues.
- ▣ Many have been required to adapt to food allergies and plan for dietary restrictions and develop the knowledge of how to handle these issues.
- ▣ Club managers report that more contemporary menu offerings have made their club more competitive with local restaurants. Healthy menu options are frequently requested by members, delivering on this request demonstrates high levels of service to members.

5 TACTICS TAKEN TO ADDRESS TREND IMPACT

- ▣ Increased menu variety, changing menus routinely (several times per year), sourcing seasonal items locally, or growing them on-site. Some clubs conduct a quarterly review of dining trends and adjust operations accordingly.
- ▣ Clubs have developed procedures relating to allergies and dietary restrictions which include staff training, increased labeling on menus and buffets, and tracking member allergies in the club's point-of-sale system.
- ▣ Wine programming is extremely popular, with societies, events, and small/boutique-style events highly attended and in-demand.
- ▣ There is increased support for training and certifications for food and beverage managers.

GREATER EMPHASIS ON GOVERNANCE

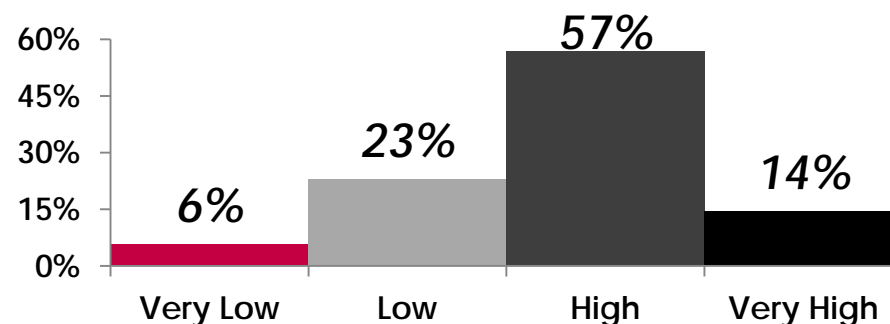
1 DESCRIPTION

Clubs seek more efficient and effective management of facilities and resources. This requires more responsive, transparent governance models and techniques. Club Boards are reviewing tenure, qualifications, reasons for serving, accountability, and transparency. Clubs stress Board training, coaching, guidance, developing problem-solving resources, and methods for active recruitment.

2 IMPACT RATING



3 DEGREE OF IMPACT



4 TREND IMPACT ON CLUBS

- ▣ Club managers feel the need for increased continuity between Boards and Committees. This includes better defined role and clearer tasks with an emphasis on staying on track and being progressive.
- ▣ Club managers feel there is the need for increased transparency and communications from the Board to membership, particularly surrounding major club decisions. They believe this will foster a sense of trust between and among the Board, management, and members.
- ▣ Some clubs are challenged to keep their Board strategic and vision focused versus tactical and operations focused.

5 TACTICS TAKEN TO ADDRESS TREND IMPACT

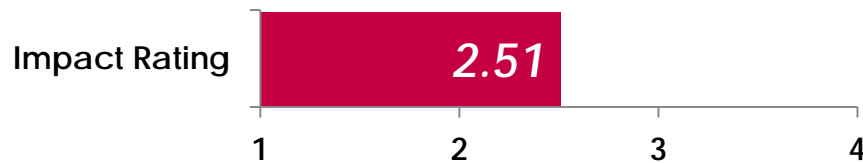
- ▣ To stay sharp, clubs conduct Board retreats and orientations to review best practices and self-evaluate performance and strategic direction.
- ▣ Clubs have enhanced the clarity of multiyear goals, guidelines on cash reserves, and rules for sourcing/allocating funds.
- ▣ Clubs have recently reviewed their bylaws and developed detailed policy manuals and handbooks clearly delineating roles, job descriptions, and responsibilities.
- ▣ Some clubs have developed Leadership Development Committees or others focused solely on governance.

HEALTH AND WELLNESS

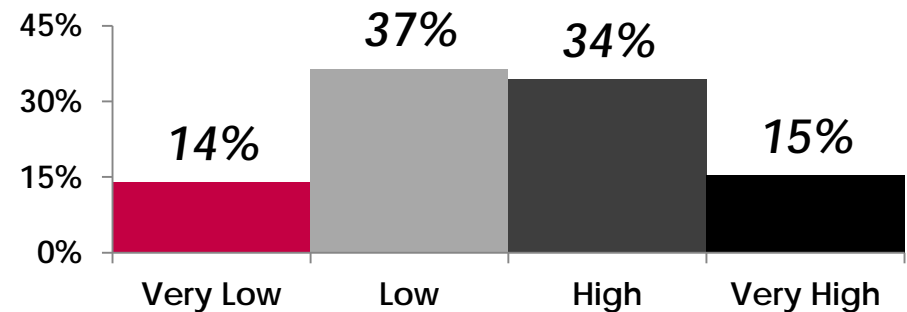
1 DESCRIPTION

As part of adopting a healthier lifestyle, Clubs offer a range of integrated, alternative fitness amenities and wellness services such as physical therapy, rehabilitation, diet/nutrition coaching, personalized on-site spa services (nails, waxing, coiffure), medical referral networks, and an emphasis on health and wellness to augment fitness offerings.

2 IMPACT RATING



3 DEGREE OF IMPACT



4 TREND IMPACT ON CLUBS

- ▣ Those offering health and wellness services have found them to be very successful in attracting new members and retaining aging members. Some managers claim that these services are no longer nice add-ons, but imperative to club utilization.
- ▣ The popularity of health and wellness offerings has increased facility utilization and service demand requiring more staff and better programs.
- ▣ Some clubs are feeling pressured to develop these services in order to compete with athletic and fitness clubs.

5 TACTICS TAKEN TO ADDRESS TREND IMPACT

- ▣ Clubs are adjusting facilities to increase their capability to meet demand for health and wellness services, this includes adding or renovating fitness centers and expanding service offerings to accommodate more members.
- ▣ Right now clubs are particularly focused on the wellness component, feeling that they have prioritized 'health' in the past and are now catching up by implementing increased spa and physical therapy services.

HUMAN RESOURCES MANAGEMENT

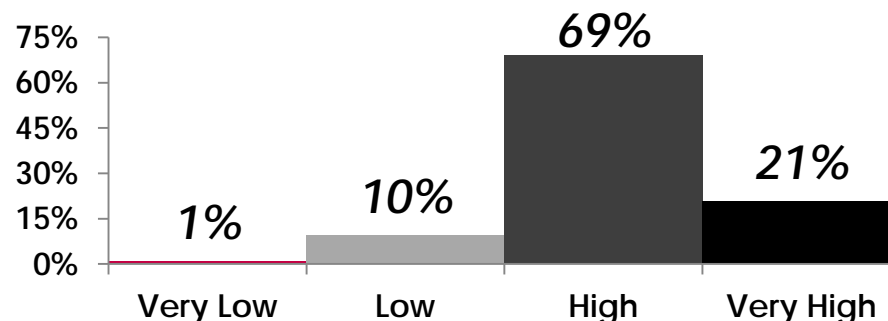
① DESCRIPTION

Clubs continue to refine their management of human resources, adjusting to changes in health care, over-time regulations, legal obligations, recruitment processes and internal hiring professionals.

② IMPACT RATING



③ DEGREE OF IMPACT



④ TREND IMPACT ON CLUBS

- ▣ Changes in Department of Labor requirements have placed great pressure on clubs to allocate financial and human resources to maintain compliance at the local and national level. Material cost increases have significantly increased payroll budgets, legal costs, and work hours from management. The quantity of work required of HR departments and staff is substantial, with some clubs feeling that they are struggling to keep up.
- ▣ Clubs in certain areas are challenged to hire and retain quality staff due to high local costs of living, taxes, and housing costs. Others reported that their club requires a more efficient hiring process for new employees.

⑤ TACTICS TAKEN TO ADDRESS TREND IMPACT

- ▣ Clubs have increased funding and staffing for their Human Resources departments. Some have hired more staff dedicated to HR such as HR Directors, HR Coordinators, or Employee Relations executives. Clubs have expanded their HR teams to range from 3 to 5 people.
- ▣ Health care changes include development of health savings account benefits, restructuring staff roles, redefining benefits packages, and promotion health/wellness in an effort to reduce health care costs.
- ▣ HR Departments have become more proactive about recruiting and increased employee training to foster skill development to enable upward mobility for employees.

HUMAN RESOURCES MANAGEMENT (CONTINUED)

4 TREND IMPACT ON CLUBS

- ▣ Some clubs have been compelled to adjust long-held health-care offerings to adapt to different desires of a younger, Millennial workforce. Similarly, clubs have also changed the way they discipline underperforming employees and felt an increased need to generate stronger staff appreciation and staff morale.
- ▣ Seasonal clubs have been challenged to onboard/train employees and ensure compliance in short windows of time.

5 TACTICS TAKEN TO ADDRESS TREND IMPACT

- ▣ Some clubs are improving staff retention by emphasizing their partner programs/internships for career education and skill development. Other retention tactics include exceeding minimum wage pay requirements, implementing contemporary performance review systems, and bolstering morale through departmental recognition, anniversary luncheons, and staff awards.
- ▣ Some clubs have increased member dues to finance higher payroll costs. Others have been compelled to move some salaried employees to hourly wages.

IMPORTANCE OF "FAMILY"

1 DESCRIPTION

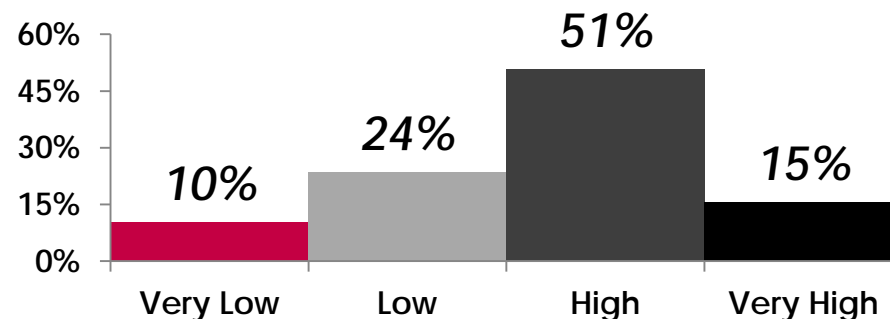
Attracting younger members and families requires greater emphasis on integrated family services such kid-zones, activities for teenagers, young adult functions and social events, as well as day care and nanny share services.

2 IMPACT RATING

Impact Rating



3 DEGREE OF IMPACT



4 TREND IMPACT ON CLUBS

- ▣ Many managers feel that being 'family friendly' is vital to recruiting and retaining new members, many reported their new members are in their mid-40s with families and children and made their club decision specifically with their family in mind.
- ▣ Changing club demographics has required clubs to review activities and programs to ensure that the club is attractive to prospective members in a different lifecycle.
- ▣ Some clubs feel the need to enhance facilities and services, currently viewing them as inadequate.

5 TACTICS TAKEN TO ADDRESS TREND IMPACT

- ▣ Many have developed entertainment committees or hired full time activity directors that focus on managing youth programs, children's activities, and junior events.
- ▣ Clubs have added expansive babysitting areas, created kids' clubs, implemented preschool programs, and are now offering a variety of camps all year long, not just during the summer.
- ▣ Clubs are actively promoting their family-centric offerings through targeted brochures and marketing campaigns.

INTERGENERATIONAL ISSUES

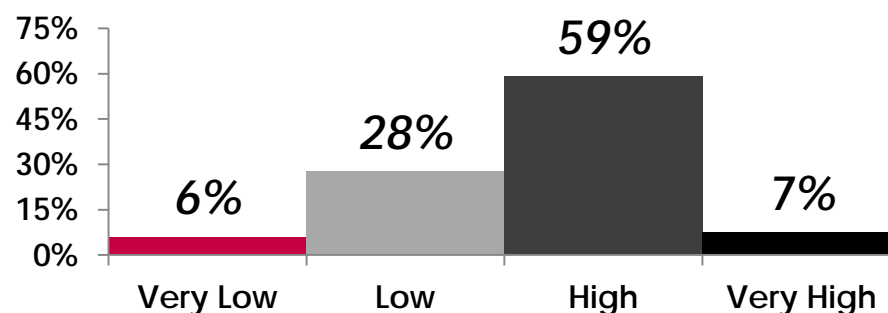
1 DESCRIPTION

Clubs are challenged to serve multiple generations with different perspectives and lifestyles. Clubs must remain relevant to each generation, plan for the changing lifecycle of a member, and offer membership flexibility. Many Clubs have yet to adapt their age restrictions for Senior membership transfers or Intermediate membership cessation to better reflect longer life expectancies and increased activity levels at older ages or the longer path for young adults to family life and financially rewarding careers.

2 IMPACT RATING



3 DEGREE OF IMPACT



4 TREND IMPACT ON CLUBS

- ▣ Club demographics can span four generations, there is increasing importance to accommodate young members and their families and children and develop relevant services and amenities.
- ▣ Some clubs are seeing the need to be prepared to accommodate aging changes related to disability or physical limitation, dementia, or increased member participation in socialization and events such as cards.
- ▣ The financial position of some clubs is being negatively impacted by growing transfers to senior categories.

5 TACTICS TAKEN TO ADDRESS TREND IMPACT

- ▣ Membership Committees are adjusting senior category requirements to more accurately relate to their usage of the club, some have eliminated tenure requirements for this category to ensure retention.
- ▣ Some clubs have undertaken renovations to accommodate disabilities and age-related limitations.
- ▣ Increased health and wellness offerings for aging members such as education training and more relevant class offerings.

INTERGENERATIONAL ISSUES (CONTINUED)

4 TREND IMPACT ON CLUBS

- ▣ The financial position of some clubs is being negatively impacted by growing transfers to senior categories.
- ▣ Clubs are feeling pressured to make capital spending tangible to all age segments to avoid perceptions of favoritism.
- ▣ Some clubs have been forced to segment social events and club programming in order to stay relevant and draw engagement from members.

5 TACTICS TAKEN TO ADDRESS TREND IMPACT

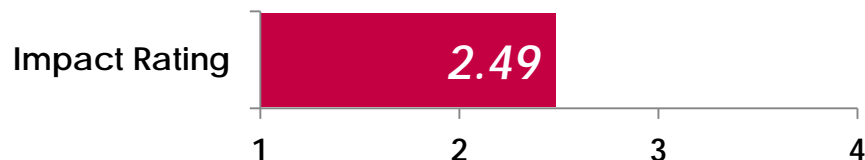
- ▣ Several clubs have implemented new member discounts on senior and young intermediate categories with success.
- ▣ Equity pay-down programs have been implemented to allow aging equity members to use their equity to pay dues.

INTRODUCTORY GOLF INITIATIVES

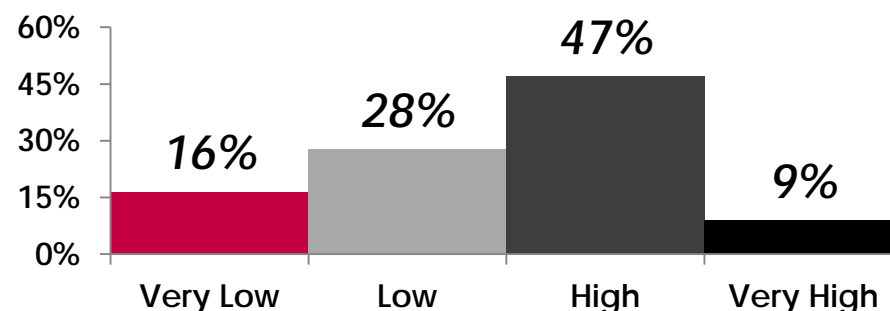
1 DESCRIPTION

While there has been considerable press in recent years surrounding the slowing of golf participation rates, new research indicates that the number of beginning golfers in 2016 is close to the highest number of all time and that new interest in the game from non-golfers is also at an all-time high. Accordingly, introductory golf initiatives are becoming increasingly important. Clubs are being challenged to find ways to activate those interested in playing golf, to retain a higher percentage of those who try golf, and develop structured introduction programs. The key element here is that these are “new” golfers, not necessarily “younger” golfers.

2 IMPACT RATING



3 DEGREE OF IMPACT



4 TREND IMPACT ON CLUBS

- ▣ In order to attract new members, clubs feel the need to combat perceptions that wait lists exist or that the cost to belong to a private club is too high.
- ▣ Clubs focus on the future by recruiting younger members and families through an emphasis on socialization and community-building rather than skill development.
- ▣ Some clubs have seen negative impacts of newer golfers, particularly on the course with slower play and increased traffic.

5 TACTICS TAKEN TO ADDRESS TREND IMPACT

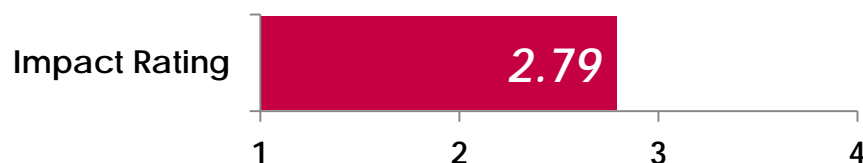
- ▣ Clubs have revised membership offerings to accommodate new players in categories such as Twilight, Trial, Under 40, and Ladies' Leagues, with more competitive payment plan options.
- ▣ Some clubs have added golf simulators and expanded practice facilities to foster love of the game and skill development. Many clubs now offer a variety of introductory, junior, and women's programs focused on golf education for both skills and etiquette. Some have hired dedicated staff to give lessons and administer these programs.

MEMBER-FACING TECHNOLOGY

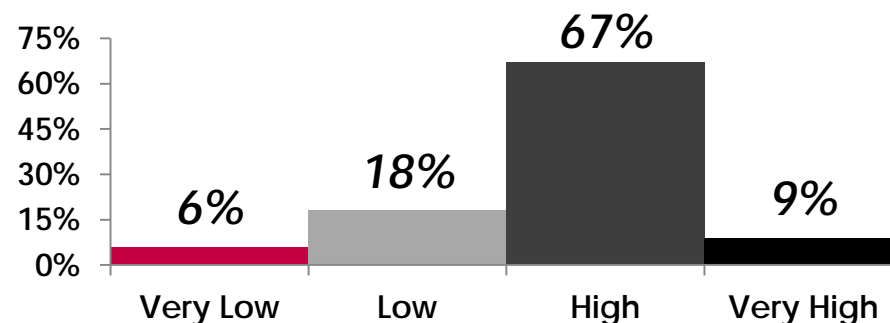
1 DESCRIPTION

Clubs are finding new ways of helping their members to stay connected. Some have incorporated new technologies such as increasing Wi-Fi bandwidth, electronic sign boards, internal member social networks, member controlled recognition and tracking systems to enhance member experience and communication with the club, as well as computer and technology classes and workshops to foster social senior interaction and help members to download apps and better use tablets and mobile devices.

2 IMPACT RATING



3 DEGREE OF IMPACT



4 TREND IMPACT ON CLUBS

- ▣ Members are looking for more ways to 'connect' and expect the club to use all communication methods and to tailor communications by preference (by interest, medium, frequency).
- ▣ There is increased demand for Wi-Fi accessibility, bandwidth, and speed. Some clubs have had to engage local communications providers to enhance sub-par infrastructure.
- ▣ Some clubs have needed to change club rules/policies to lessen restrictions on computer and mobile device usage.

5 TACTICS TAKEN TO ADDRESS TREND IMPACT

- ▣ Clubs have created dedicated teams or staff resources to manage communications and technology such as a Communications Manager, Technology Committee, or Communications and Development Committee. Teams are responsible for planning and executing communications strategy and report to the Board.
- ▣ Clubs have adopted technologies such as a social media, club mobile applications, self-service kiosks for food and beverage, and expanded wireless network capacities.
- ▣ Some clubs offer technology classes and workshops to help members learn and use their devices.

NEW CAPITAL IMPROVEMENTS FOCUSING ON EVOLVING LIFESTYLES AND TIME PRESSURES

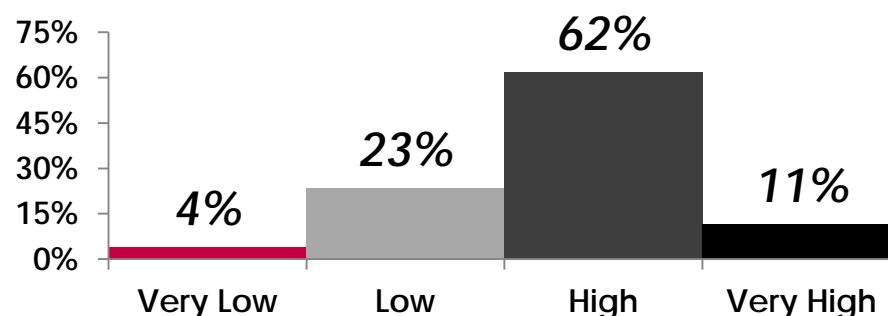
1 DESCRIPTION

New capital improvements are increasingly focused on “Lifestyle” design choices with future member preferences in mind. Many clubs are seeking market differentiation by improving club atmosphere and social settings through family-friendly design that fosters member interaction and bonding, contemporary décor, clubhouse renovations, smaller private conference/party rooms, and large-capacity banquet facilities. With continued pressure on the time members have available to spend at the club, improvements are being focused on leisure pursuits that require limited time, including HD golf simulators, practice facilities, and short-courses.

2 IMPACT RATING



3 DEGREE OF IMPACT



4 TREND IMPACT ON CLUBS

- ▣ Member survey data at some clubs has revealed high demand for capital enhancements related to lifestyle and the increasing importance to incorporate lifestyle changes into their capital planning processes.
- ▣ Clubs sustain their membership through capital improvements aimed at recruiting new members and retaining existing members through enhanced value.
- ▣ Clubs that have added teaching/instruction centers and more contemporary food and beverage designs report increased member engagement.

5 TACTICS TAKEN TO ADDRESS TREND IMPACT

- ▣ Many clubs have renovated and expanded member dining areas, driving ranges, short game areas, and Par-3 courses to afford utilization options for members with limited time. Other additions include golf simulators, fitness centers, lobby lounge areas, and more efficient parking.
- ▣ Clubs have increased the variety and frequency of social programming for all member demographics.
- ▣ Other clubs are completing master plans for future renovations that consider improvements connected to changing lifestyles.

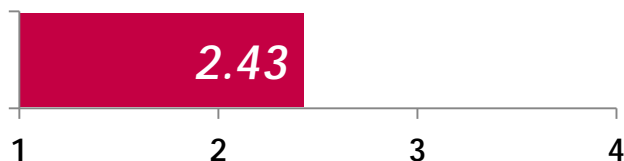
NON-TRADITIONAL PROGRAMS

1 DESCRIPTION

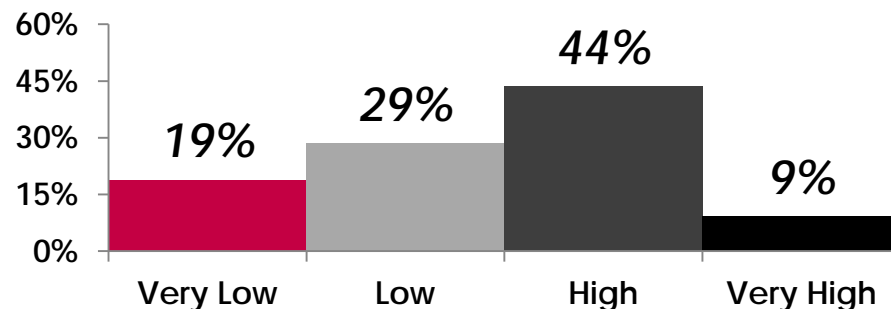
Clubs offer "more than golf" through alternative programs and activities like dance classes, pickleball, golf variations, rock climbing, travel, life-long learning, spa and concierge services.

2 IMPACT RATING

Impact Rating



3 DEGREE OF IMPACT



4 TREND IMPACT ON CLUBS

- ▣ Clubs who have implemented multifaceted, wide-ranging programming have found that it brings members together and adds value to their memberships.
- ▣ Some clubs have seen increased demand for off-site activities such as facilitated access to local events, adventure programs for children, as well as more casual club activities such as bocce ball.
- ▣ Non-traditional programming has allowed for increased engagement from children and families. Seasonal clubs have reported increased club usage during off-seasons as a result of new activities.

5 TACTICS TAKEN TO ADDRESS TREND IMPACT

- ▣ Clubs are thinking beyond golf by adding activities such as pickleball, permanent bocce ball courts, guest lecture series, pet activities, off-site dining, spa services, or croquet.
- ▣ Some have tapped into their local environment to meet demand for outdoor activities such as climbing, hunting/shooting sports, nature programs, travel clubs, and charity leagues.
- ▣ Many clubs keep the goal of maintaining an extremely full and variable social events and activities calendar to ensure members are engaged.

PACE OF PLAY

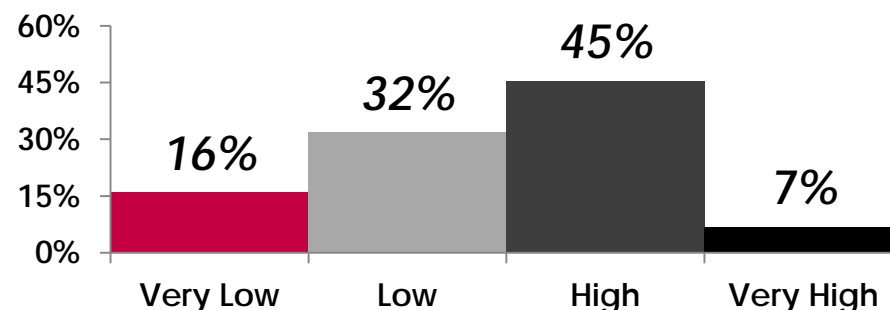
1 DESCRIPTION

Greater emphasis is being placed on pace-of-play for a round of golf in order to further improve the member experience and address the sense of ever-increasing time constraints. Recent studies suggest that managing a smooth flow without bottlenecks is more important than total duration of a round of golf to members. Consequently, on-course marshals and other remote tracking systems are increasing in popularity at private clubs.

2 IMPACT RATING



3 DEGREE OF IMPACT



4 TREND IMPACT ON CLUBS

- ▣ Clubs reported the belief that pace of play is the most important factor in a member's experience with their round of golf.
- ▣ Several clubs with older, tenured members struggle to enforce pace rules due to slower play, slower course navigation, and a sense of ownership over the course.
- ▣ Clubs without technology focused on pace of play have needed to divert staff attention to measure, monitor, and enforce pace of play.

5 TACTICS TAKEN TO ADDRESS TREND IMPACT

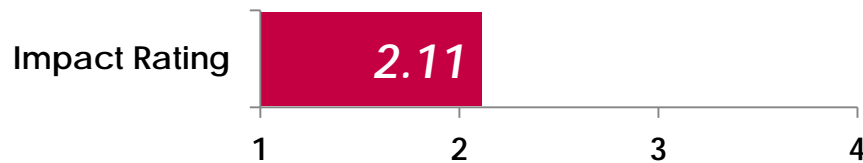
- ▣ To measure pace most participating clubs rely on various technologies such as golf cart GPS systems with time-tracking capabilities or time clock programs at 1st tee start and 18th tee close.
- ▣ Other clubs rely on caddies and marshals to ensure consistent pace. These clubs reportedly over-communicate to members their policies and the concept of 'ready golf'.
- ▣ Many clubs indicated that they will write a letter to members who breach pace rules and have found it to be successful.

PARKING AVAILABILITY AND SERVICES

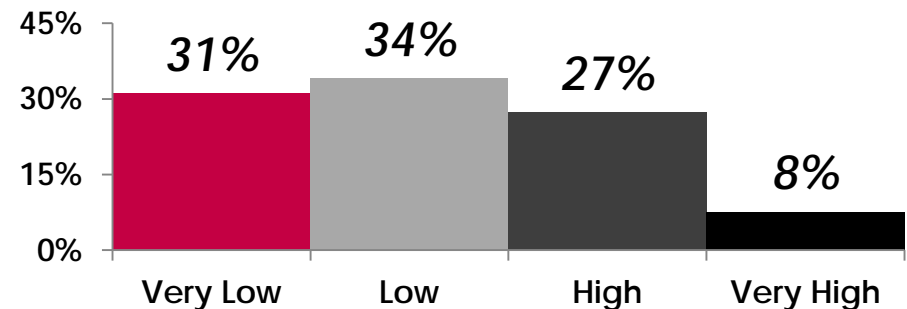
1 DESCRIPTION

With most members driving to their club, parking availability is a pervasive challenge, especially at city clubs. Some clubs are finding off-property space and operating shuttle services, while others are considering sizable capital expenditures to construct vertical parking structures. Services around parking are also becoming more prevalent such as valet parking, car wash stations and charging stations for modern electric vehicles.

2 IMPACT RATING



3 DEGREE OF IMPACT



4 TREND IMPACT ON CLUBS

- ▣ At some clubs there is more demand for parking availability than clubs can accommodate. Clubs indicated that this is a deterrent for their members' utilization of the club, if they can't park they often won't come.
- ▣ Some clubs have seen increased costs to pay for parking or rent/lease lots during peak times. Several reported not being able to afford to buy a lot in their area.
- ▣ Successful capital improvements and enhanced programming had led to increased traffic at some clubs and has increased demand for parking.

5 TACTICS TAKEN TO ADDRESS TREND IMPACT

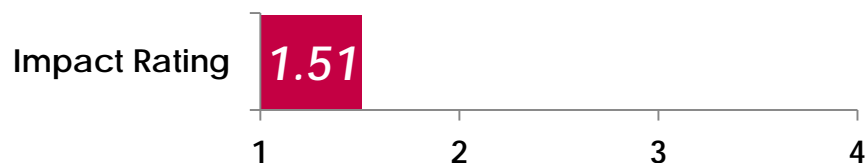
- ▣ Many clubs rent or lease off-site parking, particularly during peak times. Employee parking is often moved off-site to accommodate members. Some have negotiated competitive parking rates or arranged shuttle services.
- ▣ Other clubs work with their local community or neighboring businesses to find more space. Some have implemented counting systems which show lot capacity to prevent additional driving in search of parking.
- ▣ Some clubs encourage members to use alternate means of transport such as rideshare services like Lyft/Uber. Several offer return trip vouchers for members who use mass transit.

PAY-PER-USE MEMBERSHIP OFFERINGS

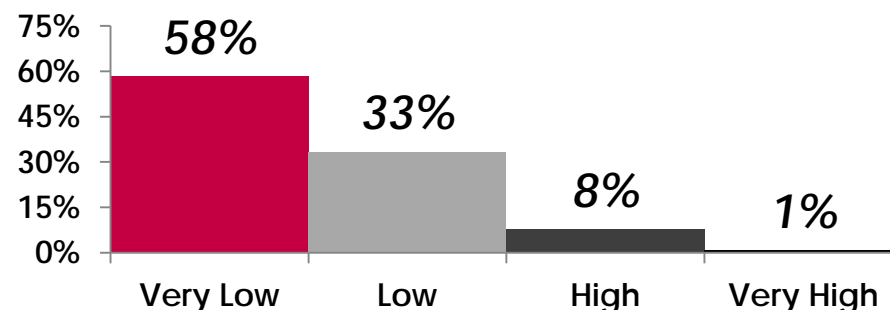
1 DESCRIPTION

In response to growing demand and in an effort to increase facility utilization and maximize revenue, clubs are implementing new membership programs designed to be pay-per-use as opposed to the typical unlimited-use offerings. Examples include pay-per-use of non-traditional amenities (such as bocce ball, golf simulators, horseback riding, various children's programs) or wellness offerings (such as fitness classes, barber/salon, or massage and spa services).

2 IMPACT RATING



3 DEGREE OF IMPACT



4 TREND IMPACT ON CLUBS

- ▣ Some clubs have experienced difficulty attracting new members due to time-constraints or limited-use scenarios and have felt the need to offer membership options tied to utilization or seasonality.
- ▣ At some clubs, non-resident use of the club has increased to the extent that it has negatively impacted availability of programs and access to facilities.

5 TACTICS TAKEN TO ADDRESS TREND IMPACT

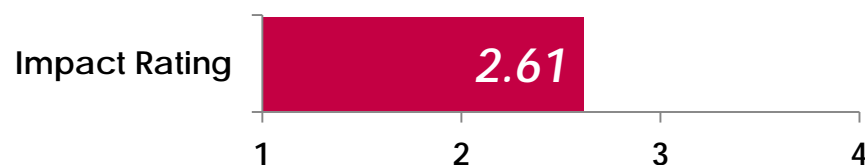
- ▣ Clubs have begun to offer memberships with costs associated to rounds played or facility utilization to capture limited-use demographics.
- ▣ Some clubs are reviewing policies relating to guest and non-resident utilization of the club in which cost increases in tandem with utilization. In other cases, clubs have decreased privileges available to these categories in the hopes of converting them into new memberships.

SECURITY

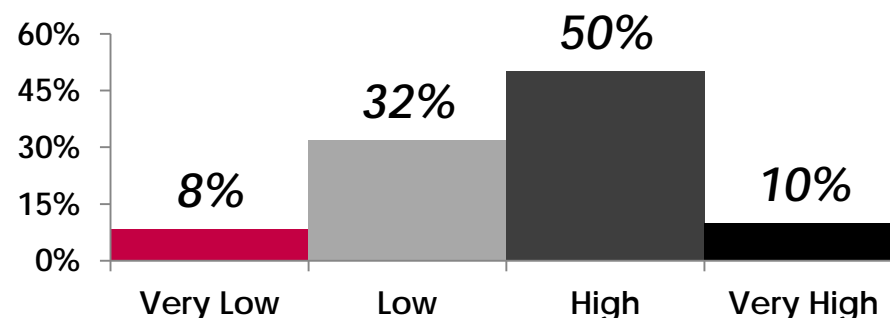
1 DESCRIPTION

Member and employee security, both physical and cyber, is a concern for every club. Efforts to secure and protect communities to establish a "safe haven" have increased through preemptive planning for crisis management and communication, deliberate facility access methods, and supervision in childminding and kids' zones such as pools and play areas.

2 IMPACT RATING



3 DEGREE OF IMPACT



4 TREND IMPACT ON CLUBS

- ▣ Members often expect clubs to have appropriate security systems in place for entry security, personal well-being, personal possessions, and cyber security systems to protect personal data.
- ▣ Clubs are consistently expected to adopt a proactive, rather than reactive, stance on the topic of security.
- ▣ Certain club types are more susceptible to increased expectations than others, particularly city clubs who need to address local issues and potential turmoil, and those in high-tourism areas that face privacy concerns from members.

5 TACTICS TAKEN TO ADDRESS TREND IMPACT

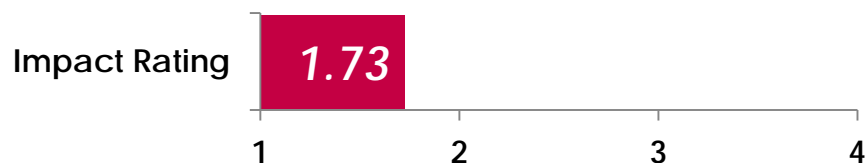
- ▣ Many clubs have a Safety Committee that has organized increase employee training and club planning for emergency management.
- ▣ Full-time, professional security staff have been hired by many clubs to foresee and address security issues.
- ▣ Physical additions include security gates, fob or card access to facilities, facial recognition software, advanced camera systems.
- ▣ Some clubs conduct security audits with local police or other private entities.

SEXUAL ORIENTATION

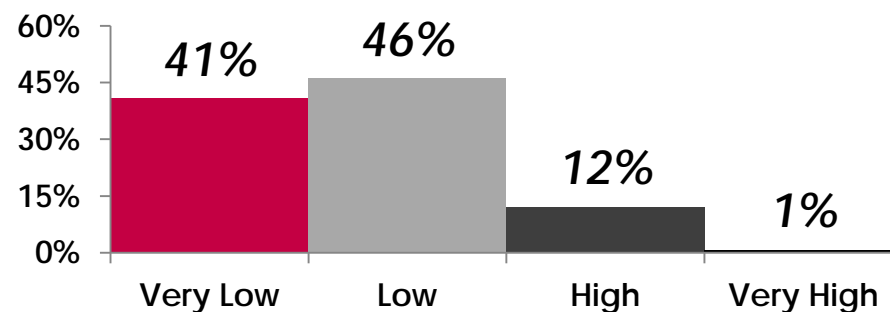
1 DESCRIPTION

Clubs recognize the need to provide flexible and appropriate accommodations for all members regardless of identity. Providing for gender-neutral and transgender utilization of club facilities is being considered.

2 IMPACT RATING



3 DEGREE OF IMPACT



4 TREND IMPACT ON CLUBS

- Some clubs are in the process of removing barriers for spouses to be considered as members themselves rather than spouses.

5 TACTICS TAKEN TO ADDRESS TREND IMPACT

- Clubs have revised bylaws which have eliminated references to spouses and have implemented new rules that lifted previous restrictions on tee time availability for spouses.

SOPHISTICATED BUSINESS INTELLIGENCE

1 DESCRIPTION

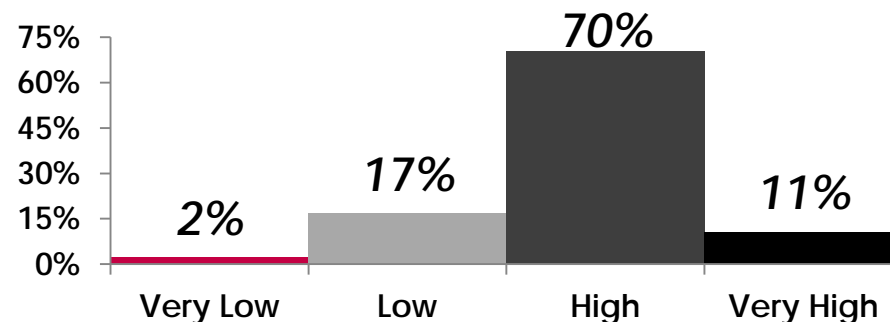
There is increasing adoption of more sophisticated business intelligence for decision making. This includes the tracking and analysis of financial and operational performance trends, market pricing trends and positioning, member satisfaction and net promoter score, comparable club benchmarking, and targeted market segmentation.

2 IMPACT RATING

Impact Rating



3 DEGREE OF IMPACT



4 TREND IMPACT ON CLUBS

- ▣ Club leaders feel pressure due to performance comparisons to benchmarks and competitors in all areas, especially as they relate to dues, fees, compensation, benefits, pricing, and staff levels.
- ▣ Club Boards and Management have increasing need to provide quantitative, interfaced data to the membership to afford informed decision-making about the club.
- ▣ Some club leaders struggle to meet their Board's demand for data which has led to an increase in staff hours to track, monitor, analyze, and produce data. Some have found traditional sources of data to be insufficient in providing the data their Board wants.

5 TACTICS TAKEN TO ADDRESS TREND IMPACT

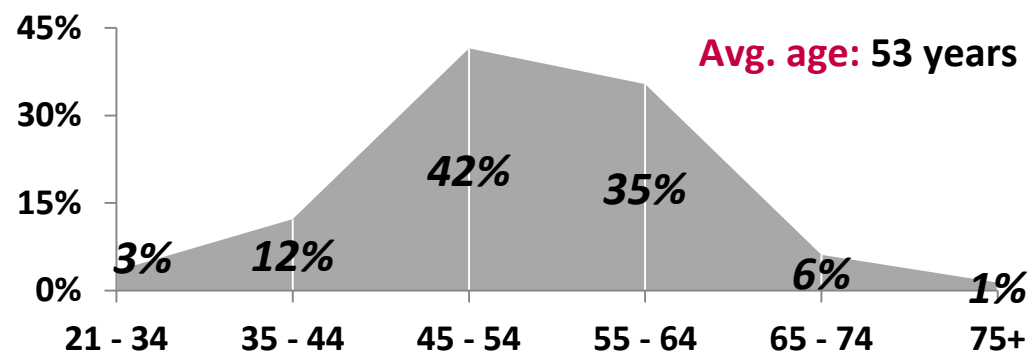
- ▣ Many top-performing clubs track specific internal and external market KPIs and act upon them to sustain market position.
- ▣ Some clubs conduct quick surveys to monitor member satisfaction levels, with staff bonuses being tied to achieving certain satisfaction levels at some clubs.
- ▣ Clubs are adopting software programs and interfaces that integrate all club software and provide necessary reports and metrics.
- ▣ Many clubs have turned to subscription-based services such as GGA's Strategic Intelligence platform or Club Benchmarking.

IV. RESPONDENT PROFILE

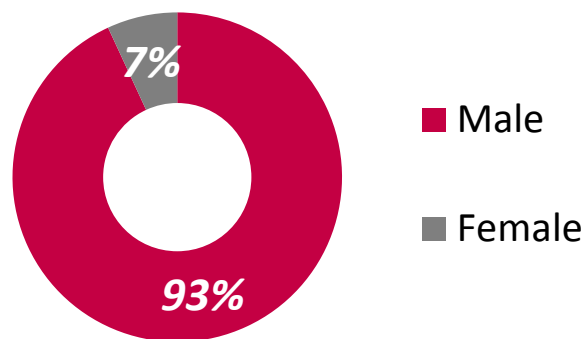
Q1. Age

More than three-quarters (77%) of participants are between the ages of 45 and 64, with the largest concentration (42%) ranging from 45 to 54.

On average, participants are approximately 53 years of age.



Q2. Gender

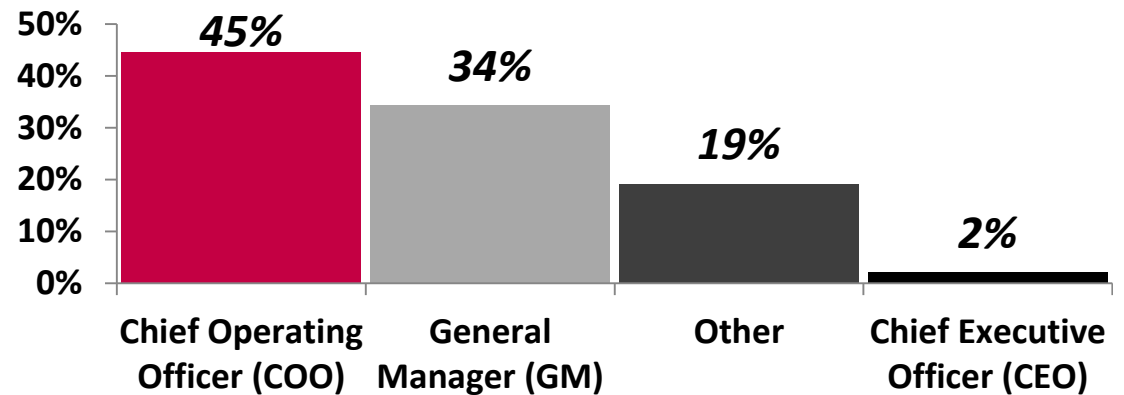


More than nine out of ten (93%) participants were men, while women accounted for 7% of respondents.

Q3. Title/Club Role

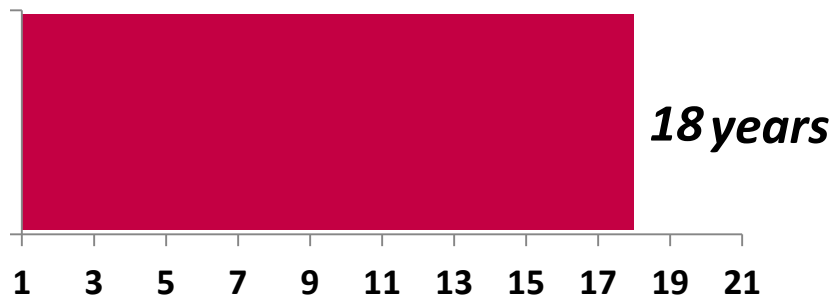
Nearly half (45%) of participating managers currently have the title of Chief Operating Officer (COO). Approximately one-third (34%) are identified as General Manager (GM).

Other titles (19%) most frequently included: Past President, Director of Operations, Executive Vice President, Executive Director, Club Manager or a combination of various titles (such as GM/COO).



Q4. Career Tenure as Primary Manager

Career Tenure as Primary Manager

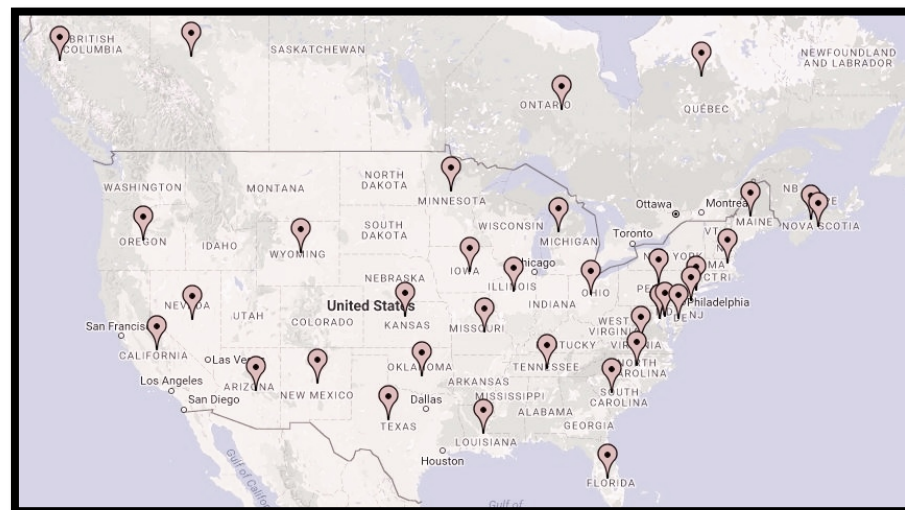


Participating managers are extremely experienced and seasoned leaders, having held a primary management role for an average of 18 years throughout their career as a club leader.

Q5. Current Club Location

Throughout their career participating managers have had extensive exposure to club leadership in various locations, markets, cultures, and demographics.

These men and women currently hold primary club management positions in the following areas:



Alabama (1%)
Alberta (3%)
Arizona (3%)
British Columbia (3%)
California (13%)
Delaware (1%)
Florida (6%)
Georgia (4%)
Illinois (4%)
Iowa (1%)
Kansas (1%)
Louisiana (1%)
Maine (1%)

Maryland (3%)
Massachusetts (3%)
Michigan (1%)
Minnesota (1%)
Missouri (1%)
Nevada (1%)
New Jersey (3%)
New Mexico (1%)
New York (5%)
North Carolina (3%)
Nova Scotia (1%)
Ohio (1%)
Oklahoma (1%)

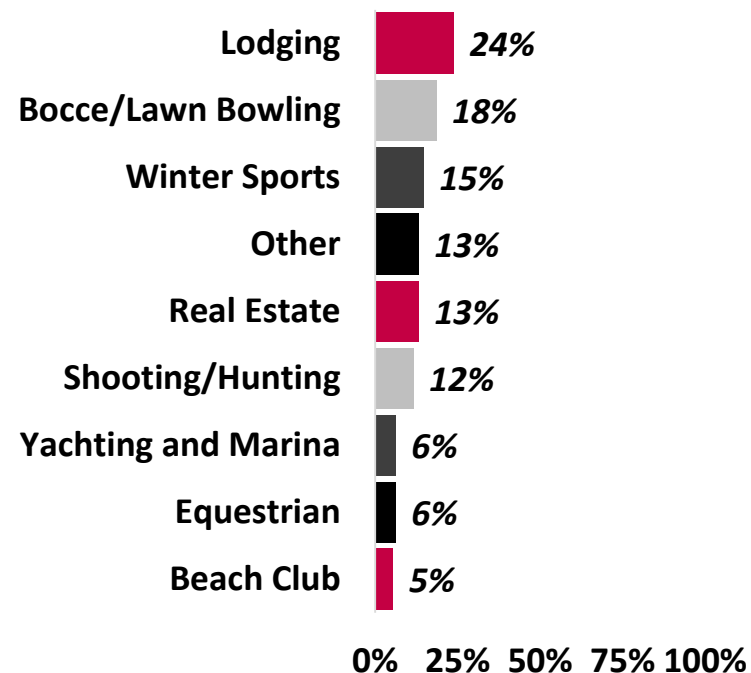
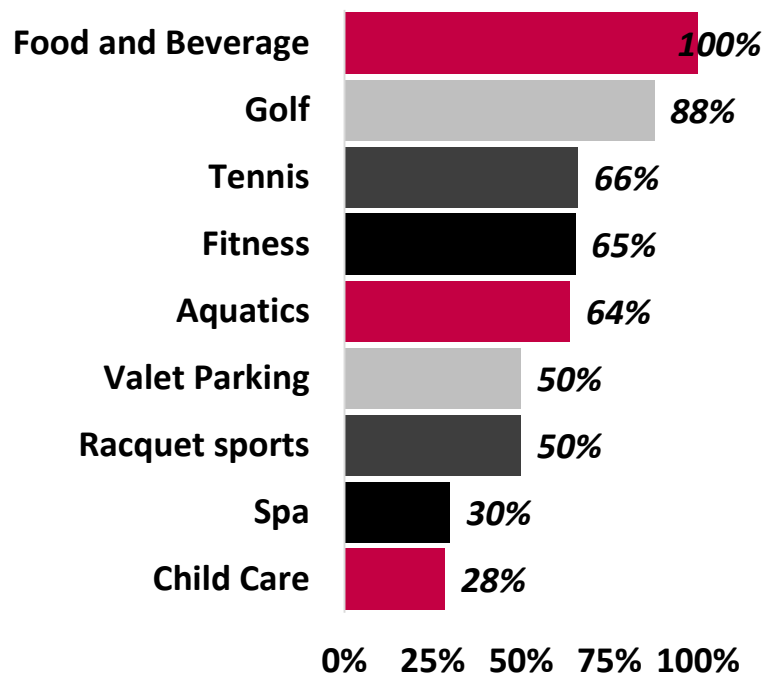
Ontario (10%)
Oregon (1%)
Outside North America (1%)
Pennsylvania (4%)
Quebec (1%)
South Carolina (3%)
Tennessee (2%)
Texas (3%)
Virginia (3%)
Washington (1%)
Washington D.C. (1%)
Wyoming (1%)

V. CLUB CHARACTERISTICS

Q6. Amenities Offered at Participating Clubs

Unsurprisingly, all participating managers (100%) indicated that their current club offers food, beverage, and dining options. After food and beverage, the top four most common amenities (offered by two-thirds or more of participating clubs) are golf, tennis, fitness, and aquatics.

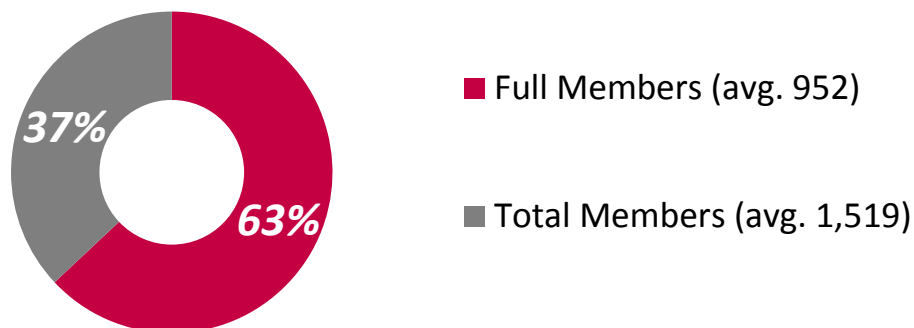
Comments identified Other, unlisted amenities (13%), which included salon/barber services, retail shopping, car cleaning, residential services, cards and table games, library, wine clubs, bowling, additional sports (gymnastics, basketball, soccer), and outdoor activities such as cycling, hiking, skiing, canoeing, kayaking, and climbing.



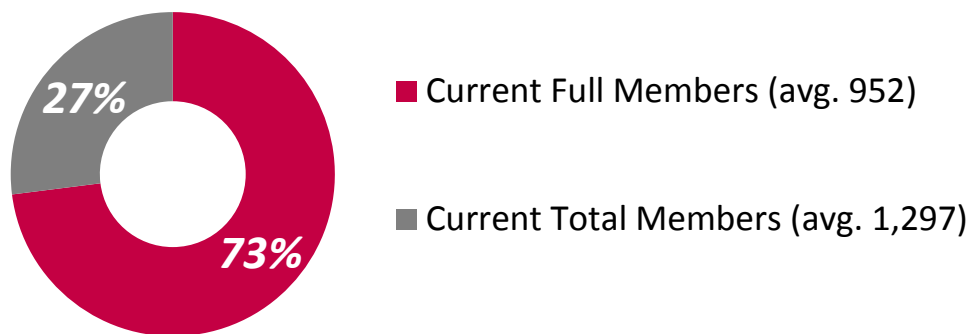
Q7. Number of Members

On average, participating clubs have approximately 1,519 members. Full privilege members account for almost two-thirds (63%) of the total membership base, or approximately 952 members. It is estimated that participating clubs are currently operating at three-quarters (73%) of their Full member capacity.

① Full Members as a Percentage of Total Membership



② Percentage of Full Member Capacity Filled



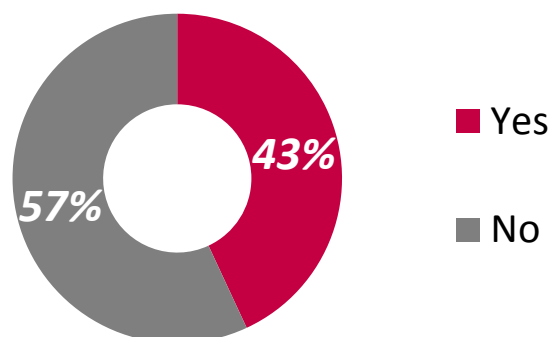
③ Number of Members

Total number of members currently	
Median	850
High	22,000
Low	145
Number of Full privilege members currently	
Median	511
High	17,156
Low	55
Full member capacity	
Median	600
High	22,000
Low	180

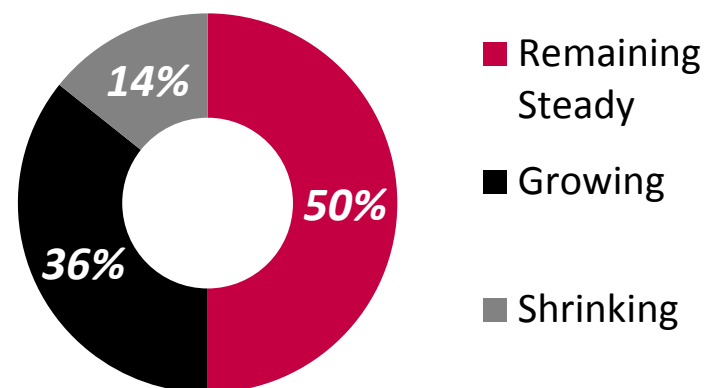
Q8. Wait Lists for Membership

Well over half (57%) of participating clubs do not currently have a wait list for membership while slightly more than four in ten (43%) do. Half (50%) of the clubs with wait lists indicated that theirs is remaining steady while more than one-third (36%) reported that theirs are continuing to grow. Less than one-fifth (14%) are seeing a decrease in wait list size.

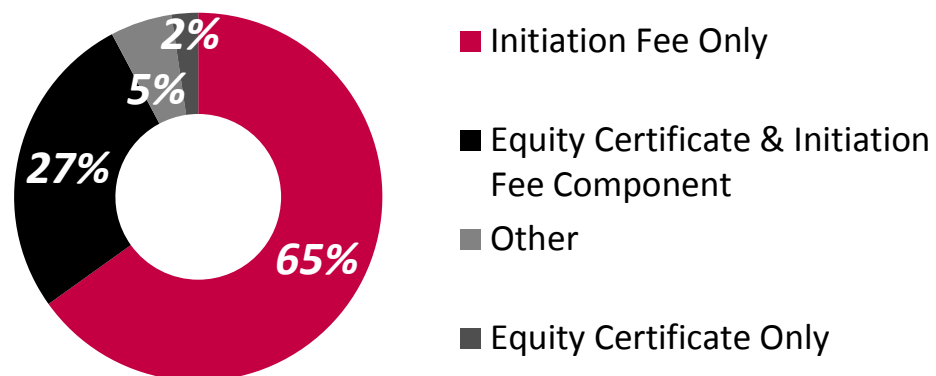
Q8B. Do you have a wait list?



Q8C. Is your wait list changing?



Q9. Entrance Fee Type

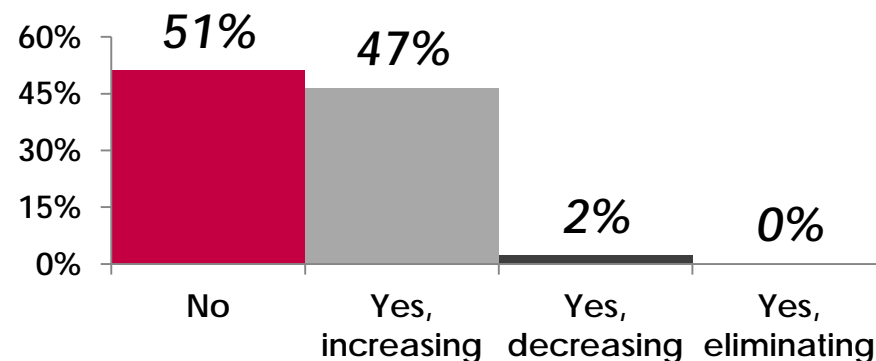


Approximately two-thirds (65%) of clubs only require an initiation fee for entry upon joining the Club. Slightly more than one-quarter (27%) combine an equity certificate and an initiation fee component while only 2% are equity certificate only.

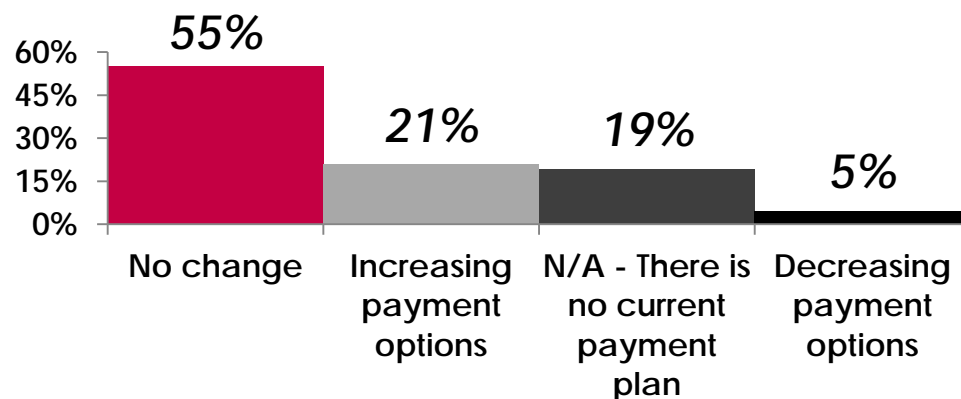
Other entrance fee types (5%) submitted by participants include a membership fee tied to a home or property purchase as well as phased payment joining options, either by percentage or costs incrementally spread over time.

Q10. Changes to Entrance Fee in Next 3 Years?

Roughly half (51%) of clubs are not contemplating changes to their entrance fees in the next three years, while almost another half amount (47%) are considering an increase to their entrance fee. Only 2% of clubs are planning to decrease their entrance fee.



Q11. Changes to Entrance Fee Payment Options in Next 3 Years?

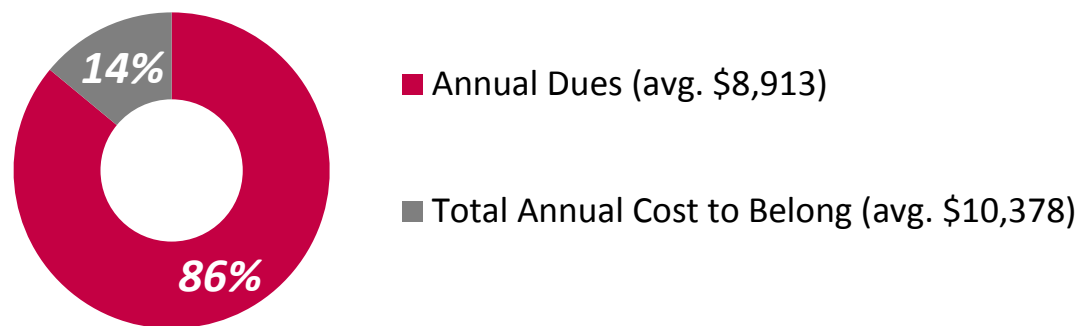


More than half (55%) of clubs are not planning to change the payment options on their entrance fees in the near future. One-fifth (21%) are contemplating an increase in payment options while roughly the same amount (19%) do not have payment plans for their entry fee.

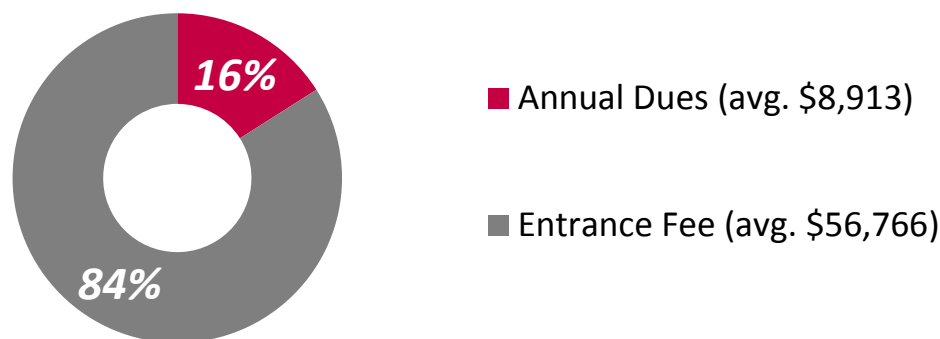
Q12. Cost to Belong

Participating club leaders were asked to estimate the overall cost to belong at their Club based on the cost for a membership with full privileges. On average, participating clubs charge an entrance fee of \$56,766 for a full privilege membership. Annual Dues account for more than four-fifths (86%) of the total annual cost to belong. It is estimated that annual dues cost approximately 16% of the entrance fee at participating clubs.

① Annual Dues as a Percentage of Total Annual Cost to Belong



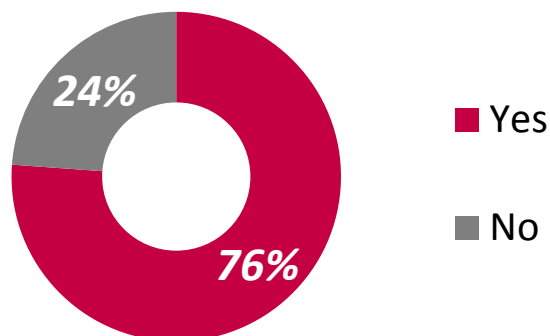
② Annual Dues as a Percentage of Entrance Fee



③ Cost to Belong

Entrance Fee	
Average	\$56,766
High	\$350,000
Low	\$0.00
Median	\$44,500
Annual Dues	
Average	\$8,913
High	\$27,000
Low	\$300
Median	\$7,800
Total Annual Cost to Belong	
Average	\$10,378
High	\$27,000
Low	\$600
Median	\$9,120

Q13. Currently Have a Strategic Plan?



Approximately three-quarters (76%) of participating club leaders currently have a Strategic Plan in place at their club.

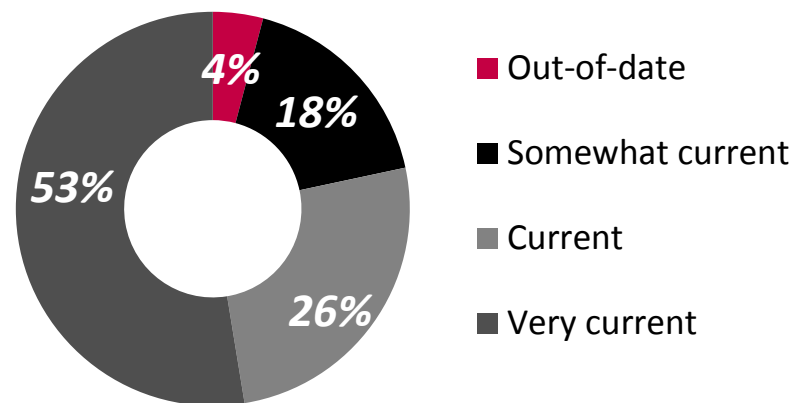
Those currently executing a Strategic Plan were asked questions expounding upon the preparedness of their Strategic Plans for the impact of trends on their Club. Their responses are summarized in the questions that follow.

Q14. How Current is your Strategic Plan?

Preparing the club for the impact of trends is an important part of the strategic planning process. In their opinion, roughly four in five (79%) of participating club leaders indicated that their plan is Current (26%) or Very Current (53%).

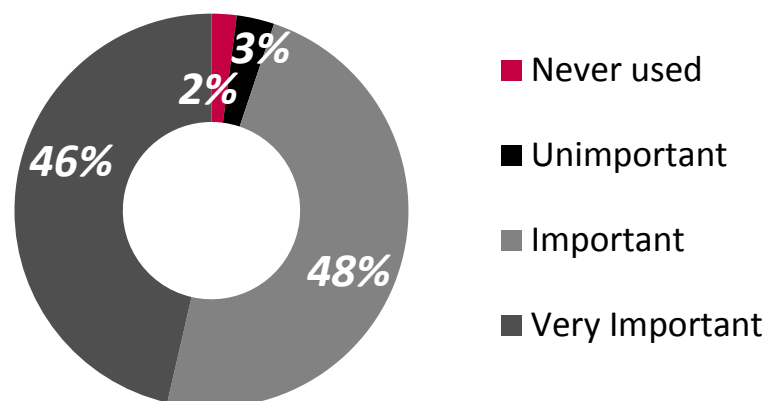
Approximately one-fifth (18%) of clubs have a plan that is Somewhat Current while 4% indicated that their plan is Out-of-date.

Answered by clubs that currently have a Strategic Plan: 76% of respondents.



Q15. Importance of Trends Analysis to Strategic Planning Process

Answered by clubs that currently have a Strategic Plan: 76% of respondents.



More than nine out of ten (94%) participating club leaders indicated that a trends analysis is important to their strategic planning process, with 46% considering it Very Important.

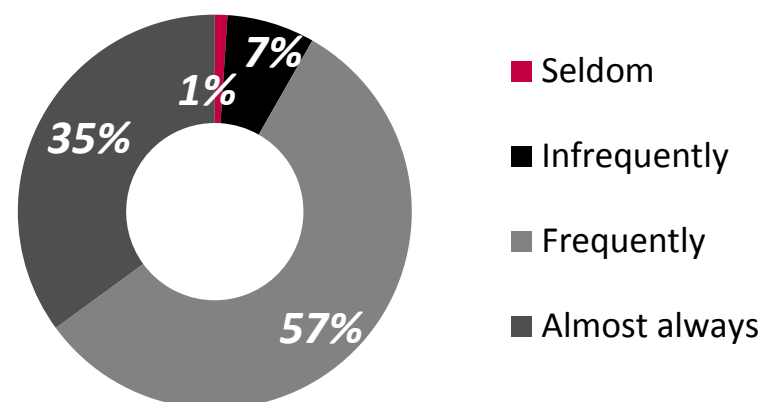
Only 5% consider a trends analysis to be unimportant to their planning process, with a very small margin (2%) indicating that they have never used one.

Q16. Extent to Which Club Decisions are Informed by Strategic Plan

The survey results confirm that elite, top-performing clubs plan their work and work their plan. Approximately one in three (35%) clubs almost always make decisions that are informed by the club's Strategic Plan. Similarly, well over half (57%) use their Plan to inform club decision-making frequently.

Less than one-tenth (8%) of participating clubs indicated that their Strategic Plan seldom or infrequently informs their decision-making process.

Answered by clubs that currently have a Strategic Plan: 76% of respondents.





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