



2022 MEMBER SURVEY

Prepared in partnership with





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Research Overview

Who

A research collaboration between the National Club Association, advocate for the private club industry in Washington, and GGA Partners, an international consulting firm and trusted advisors to the golf, private club, and leisure industries.

What

A survey of club leaders and board members, who identify how their clubs are governed, the use of strategic plans to guide decision making, and the methods and effectiveness of their brand communications.

Why

The study was conducted to provide benchmarks and reference points to enable NCA members to compare their club against survey respondents. Additionally, the results provide NCA and GGA Partners will valuable information about the tools to provide to assist members.

How

The 2022 Member Survey, conducted in the last two months of 2021, was administered via an open survey collector link distributed to members of NCA and clients of GGA Partners via email.

Aim

The data collected through this survey provides NCA members the ability to compare their governance, strategy and communications operating model and methods.

The survey also identifies the challenges private club leaders anticipate in the changing economy and the education, information and training NCA and GGA Partners can provide to assist club leaders as they navigate the challenges and opportunities ahead.



Research Overview - Responses

167

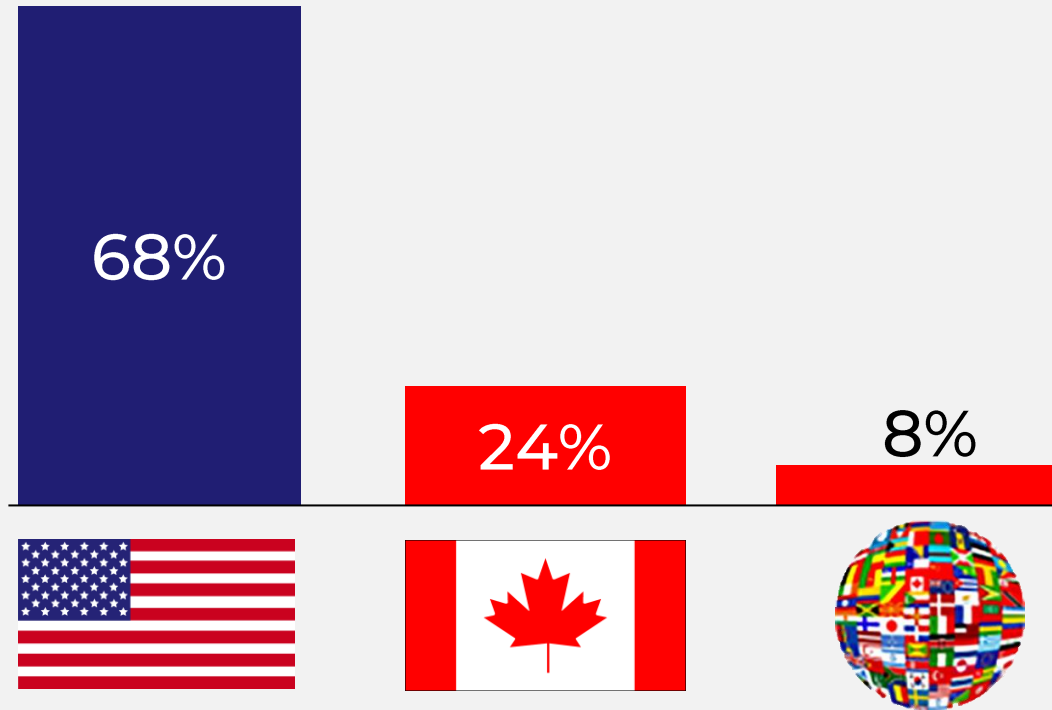
U.S. Responses

59

Canadian
Responses

20

Other Country
Responses





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Executive Summary

Governance

Private club boards are becoming more sophisticated, employing a corporate approach of focusing on strategic issues and delegating authority to the General Manager to manage operations.

Although traditions die hard in the club community, the benefits of smaller boards, flexible terms and more efficient election processes have helped private club boards to do more by doing less.

As clubs move from contested election processes, their pool of members willing to serve on their boards increases as does the quality of their board members, who are elected on their ability to serve as effective governors.

Strategy

Seven in ten (71.3%) of responding clubs rely on strategic plans to guide their decision making. The top two strategic initiatives are improving member satisfaction and the means to generate capital for improvements

Brand & Communications

Private clubs employ a variety of methods to stay abreast of member sentiment, including focus groups, surveys, listening sessions and polls. Board communications appear to be increasing, with more than 30% issuing updates on a monthly basis.

Seven of ten respondents rate their members communications efforts as effective, while just over one in ten (12%) believe they could do a better job.

NCA Support

Continuing education focused on trends, best practices and policies related to governance, labor, legal and operations are the desired intelligence NCA and GGA Partners can provide to help Board Members and club managers operate their facilities more effectively and efficiently.



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Key Insights

Governance



Number of Board Members

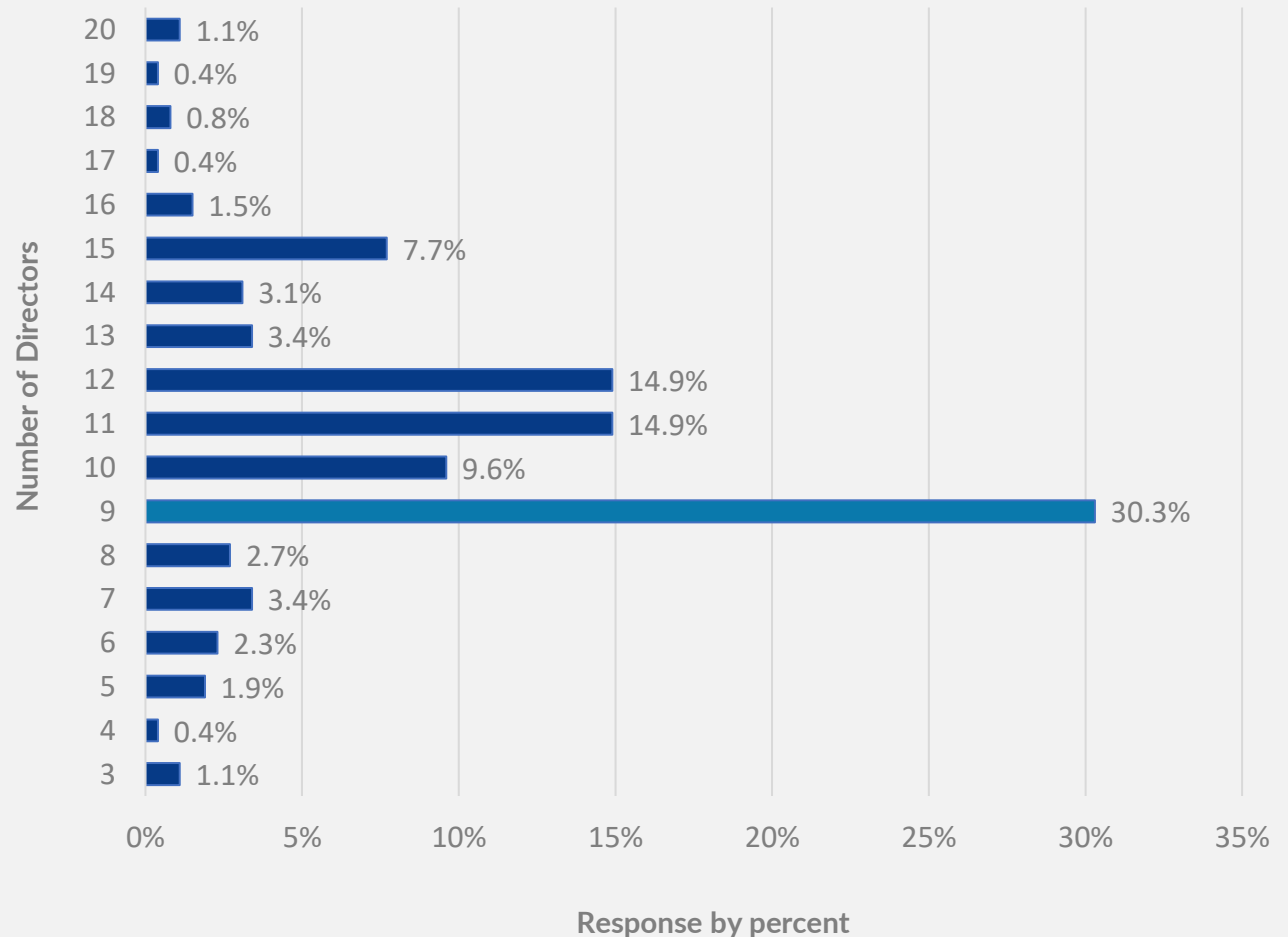
**Nearly
7 of 10**

private clubs
boards consist of
9-12 directors

9

Is the most
common
number of board
directors

THE SIZE OF PRIVATE CLUB BOARDS





Term Lengths

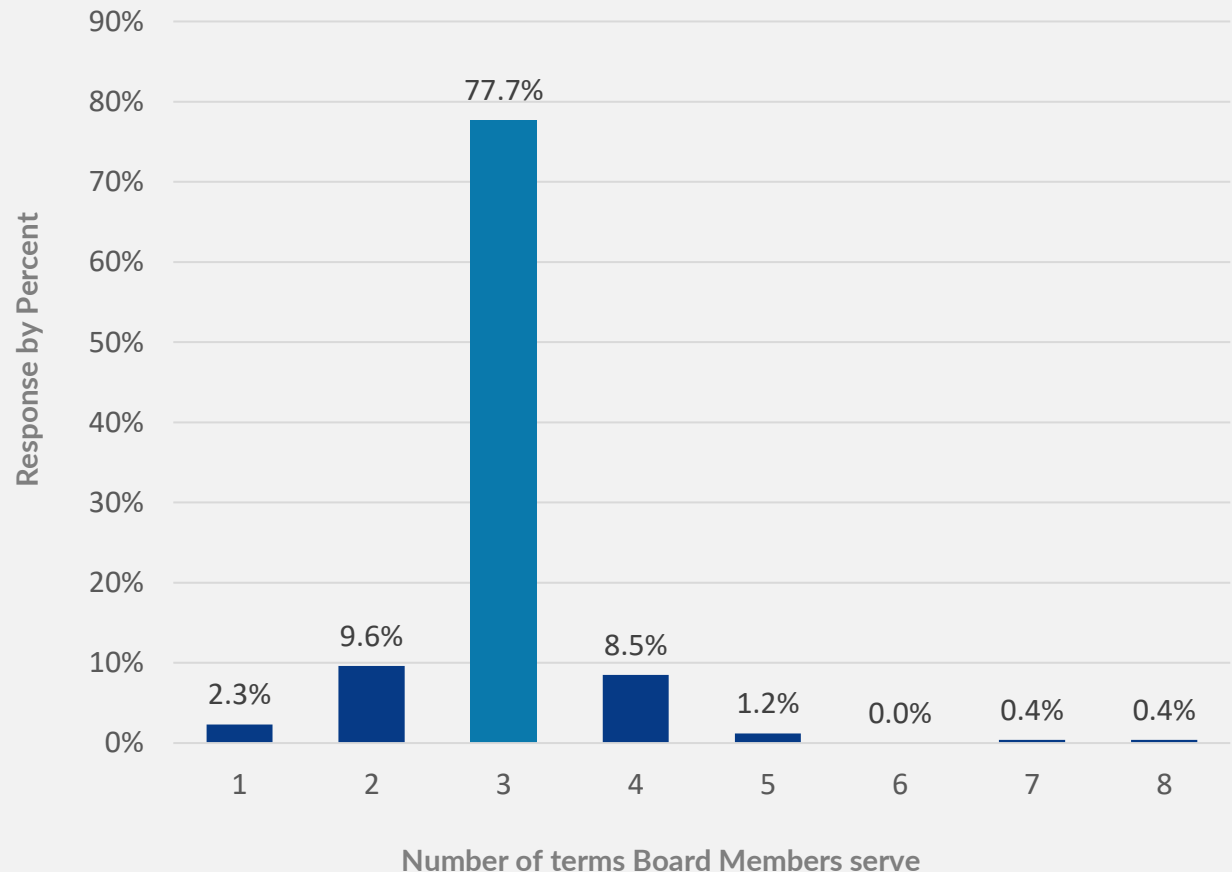
90%

of board terms are
between 2 and
4 years

3 years

is the most noted
term served by
directors

BOARD TERMS HAVE INCREASED SLIGHTLY WITH MORE DIRECTORS SERVING 4-YEAR TERMS





Board Service

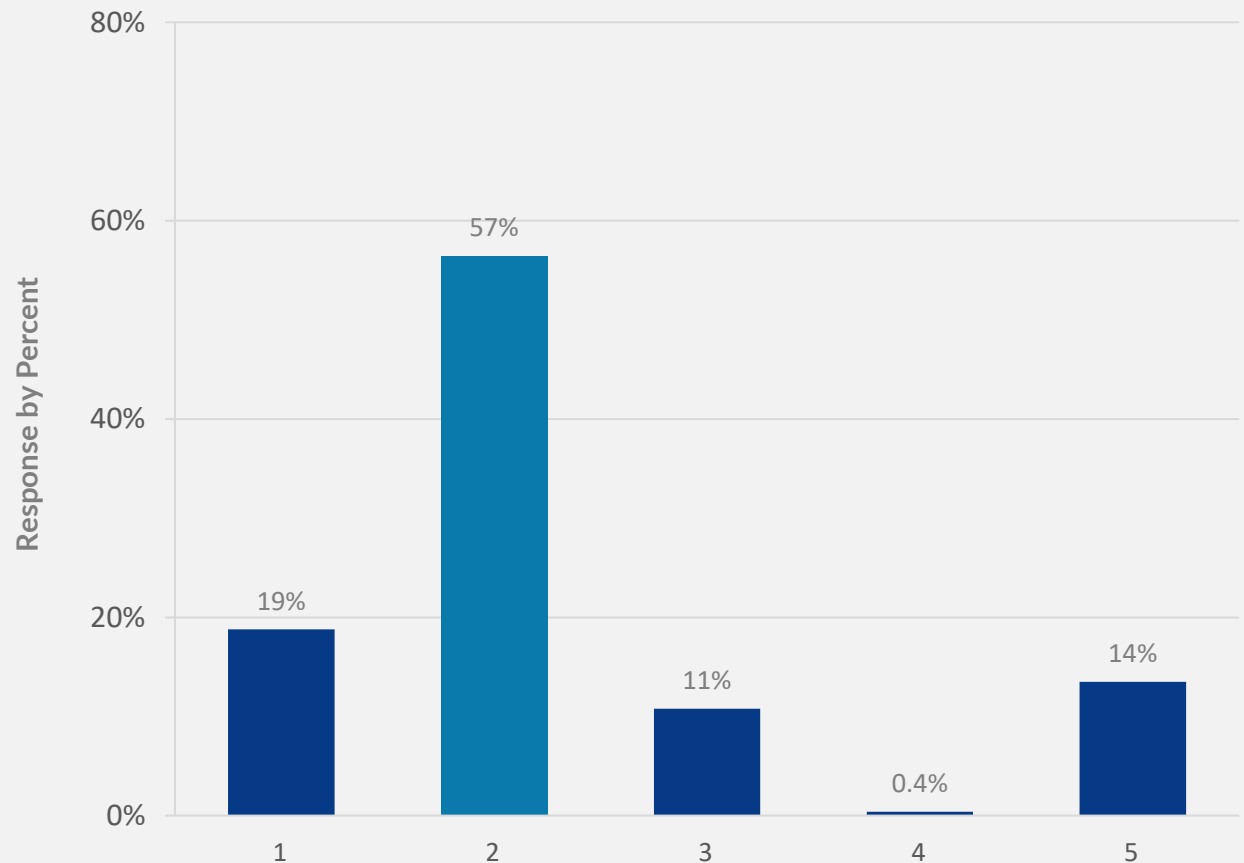
57%

of private clubs
responding to the
survey indicated
their directors are
allowed to serve
2 terms

1 out of 5

clubs limit the
term a board
member can
serve to one

THE NUMBER OF TERMS DIRECTORS MAY SERVE



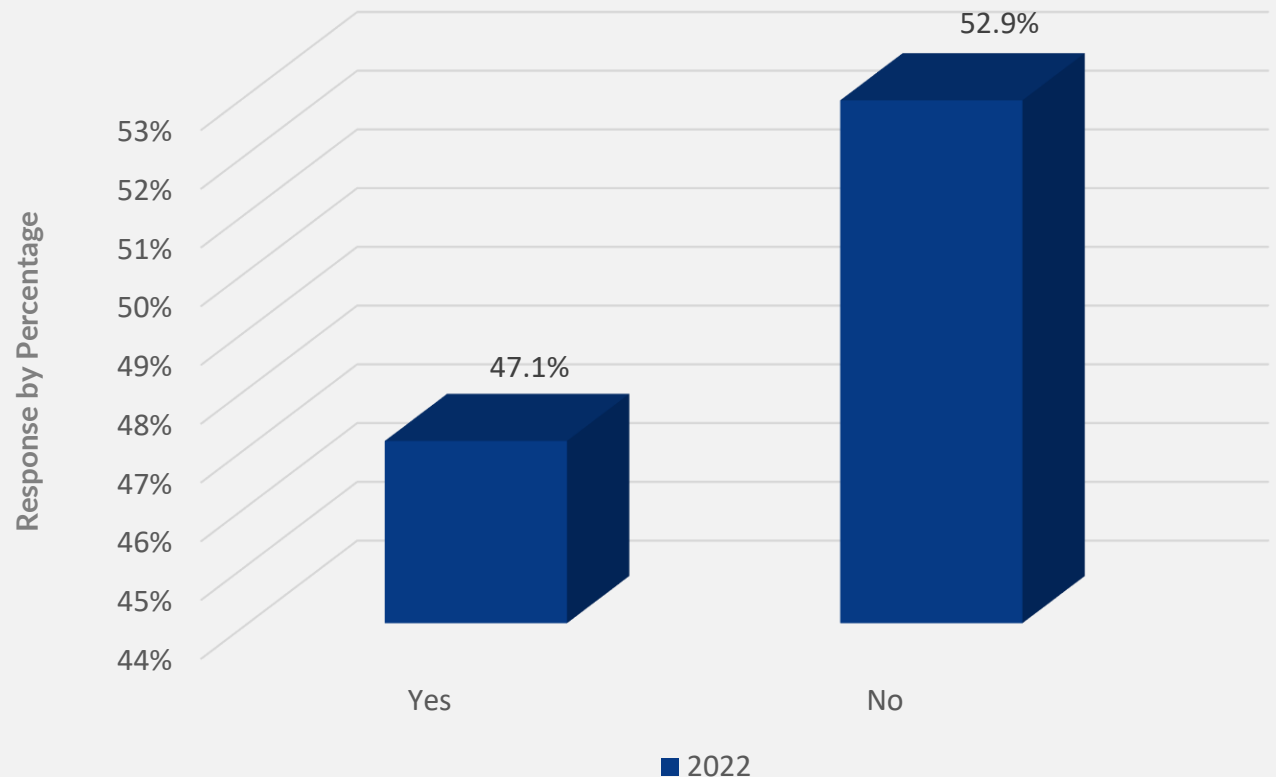
Number of terms Board Members can serve



Spouses Serving on Boards

While the majority of clubs do not allow spouses to serve as directors, the percent of those allowing spouses to serve has increased 9% since the last survey.

MEMBER SPOUSES ALLOWED TO SERVE AS DIRECTORS





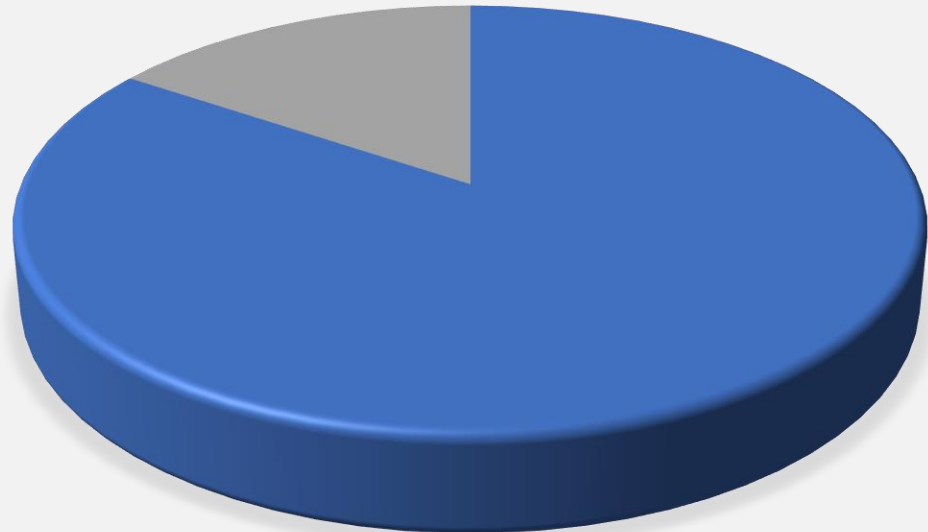
Use of Nominating Committees

84.4%

clubs that rely on
Nominating
Committees to
develop the slate
of Board
candidates

THE MAJORITY OF CLUBS RELY ON NOMINATING COMMITTEES TO SELECT CANDIDATES

No - 15.6%



Yes = 84.4%



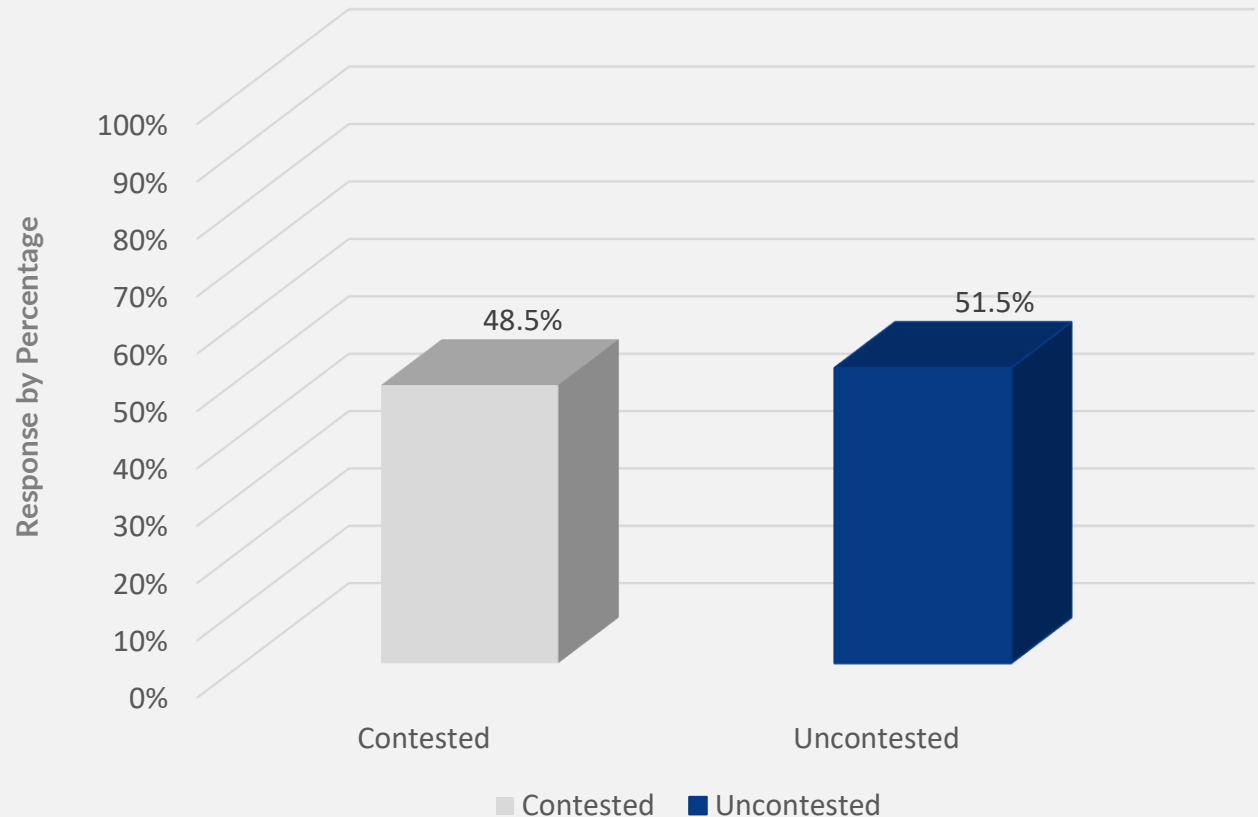
Election Type

Uncontested elections, whereby the nominating committee selects a slate of nominees equal to the number of positions to be filled, keeps the damage brought on by politics to a minimum.

A contested election risks your board members being elected on their popularity, their affiliation with a particular group or some basis other than their ability to serve as good directors..”

Fredric Laughlin
GGA Partners
Governance Expert

CONTESTED ELECTIONS – 48.5%
UNCONTESTED ELECTIONS – 51.5%





BOARD STRUCTURE

Members desire board candidates who have served on committees, are team players, can provide professional expertise and represent diverse backgrounds.

COMMITTEE EXPERIENCE CITED AS LEADING ATTRIBUTE FOR BOARD CANDIDATES



5 = strongly agree; 1 = strongly disagree



BOARD STRUCTURE

Board members are bringing their experience in running successful businesses to the board room to select directors, define roles, policies and conduct effective meetings.

PRIVATE CLUBS ARE FOLLOWING A CORPORATE APPROACH TO BOARD STRUCTURE & SERVICE



5 = strongly agree; 1 = strongly disagree



BOARD MEMBER ORIENTATION

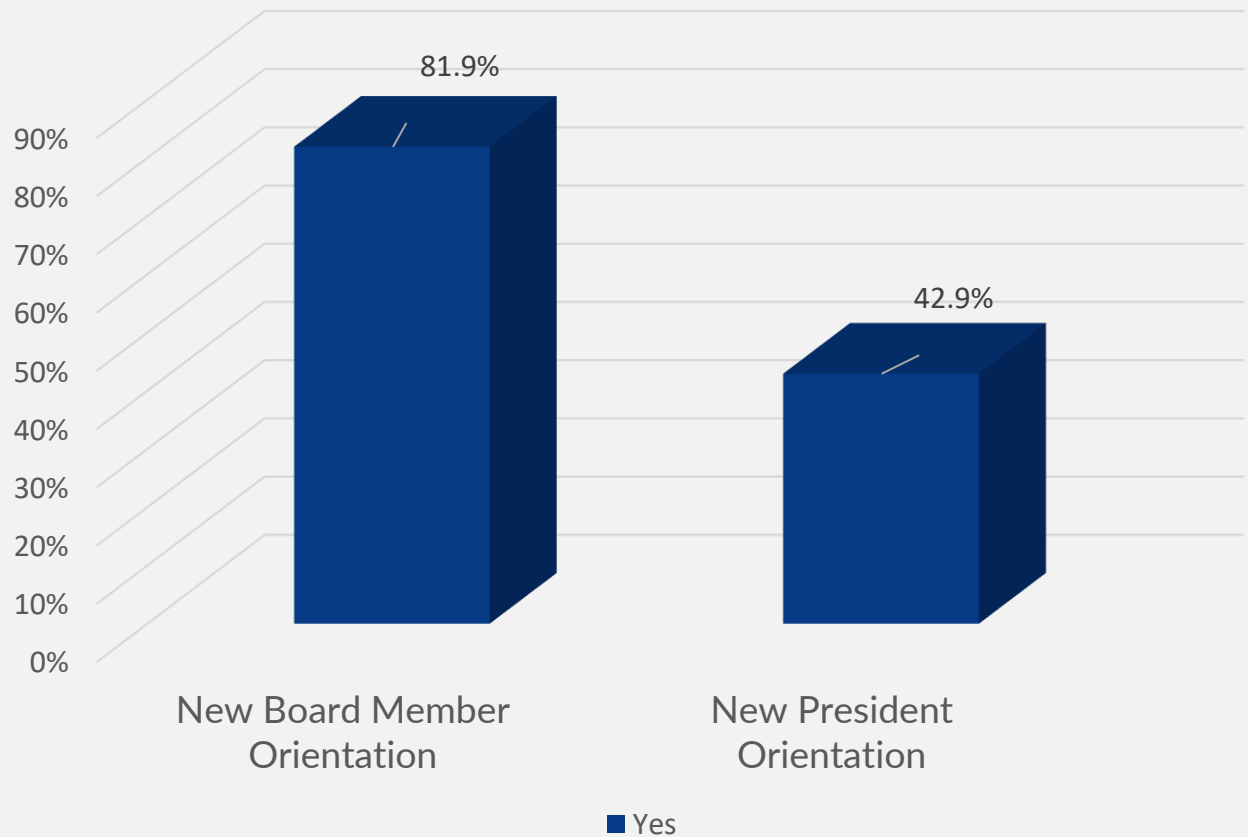
81.9%

of respondents
state their Club
conducts new
Board Member
orientations

42.9%

of respondents
state their Club
conducts new
President
orientations

**THE MAJORITY OF CLUBS CONDUCT
NEW BOARD MEMBER ORIENTATIONS, WHILE LESS
THEN HALF DO THE SAME FOR NEW PRESIDENTS**



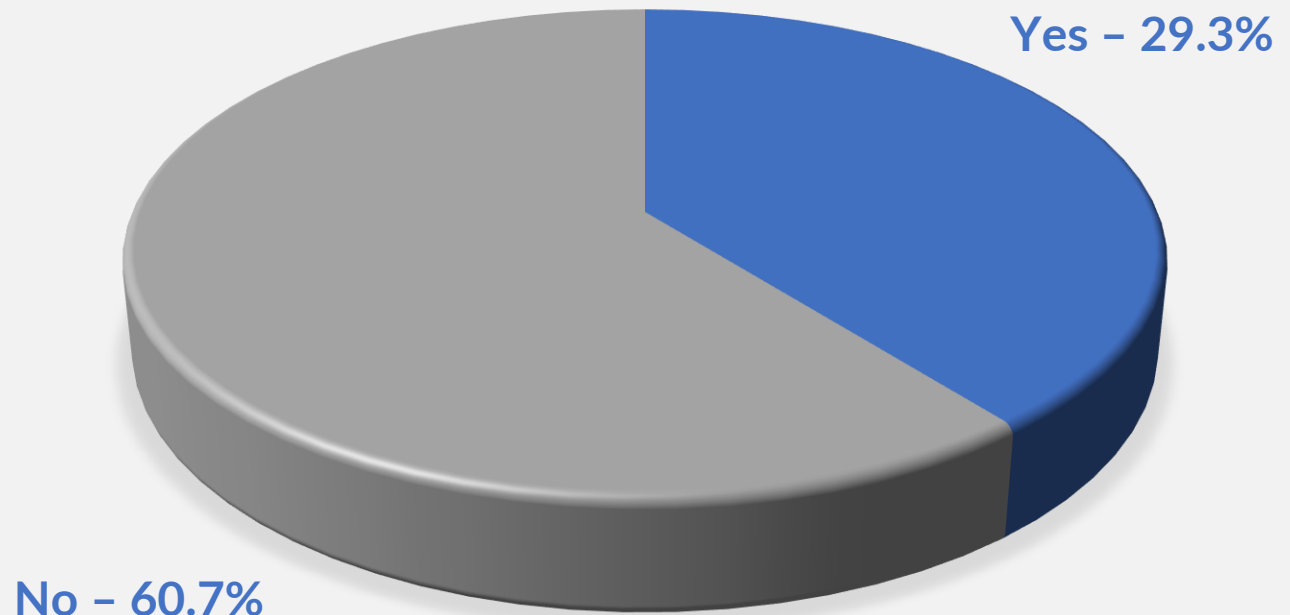


BOARD RETREATS

60.7%

number of Clubs
that do not host
annual Board
retreats.

THE MAJORITY OF CLUBS DO NOT
HOST AN ANNUAL BOARD RETREAT





CLUB COMMITTEES

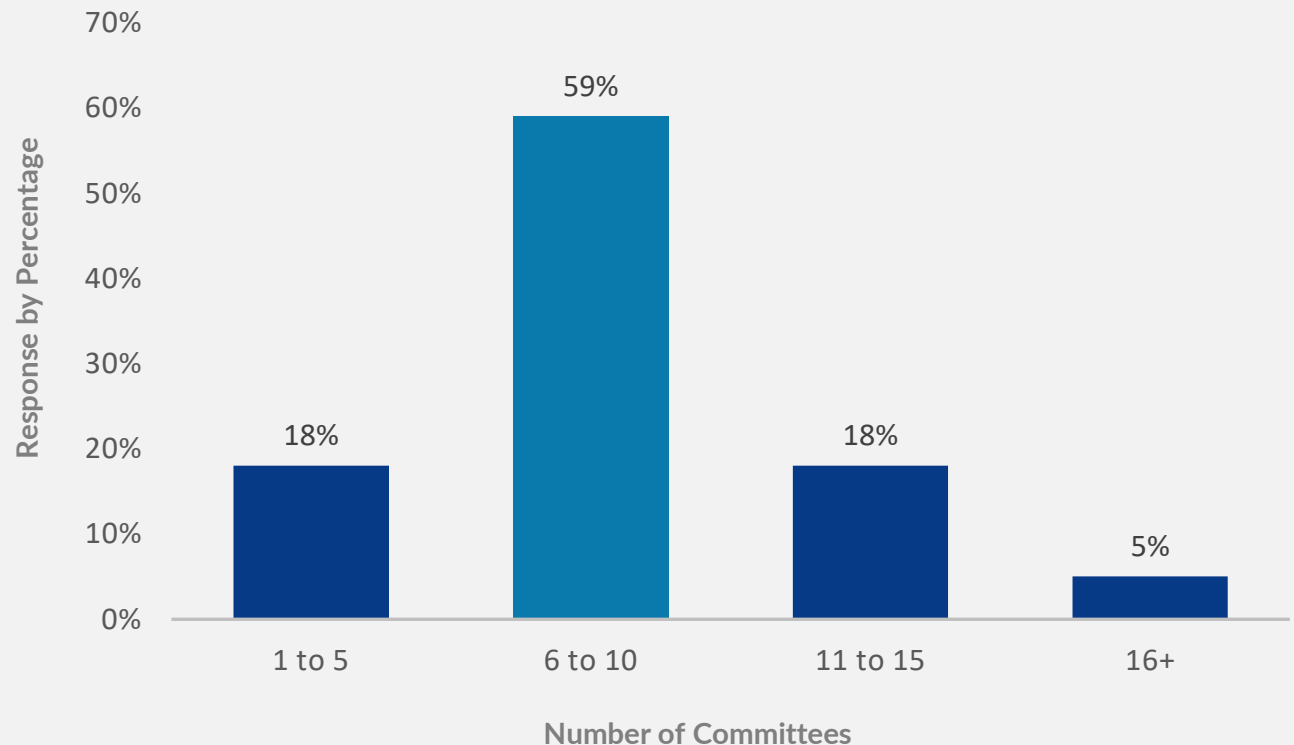
8.46

average number
of committees

6

the most
frequently
mentioned
number of
committees

THE MAJORITY OF CLUBS HAVE A MANAGEABLE NUMBER OF COMMITTEES





Key Insights

Strategy



STRATEGIC PLANS

71.3%

clubs that have
developed
strategic plans

5.46

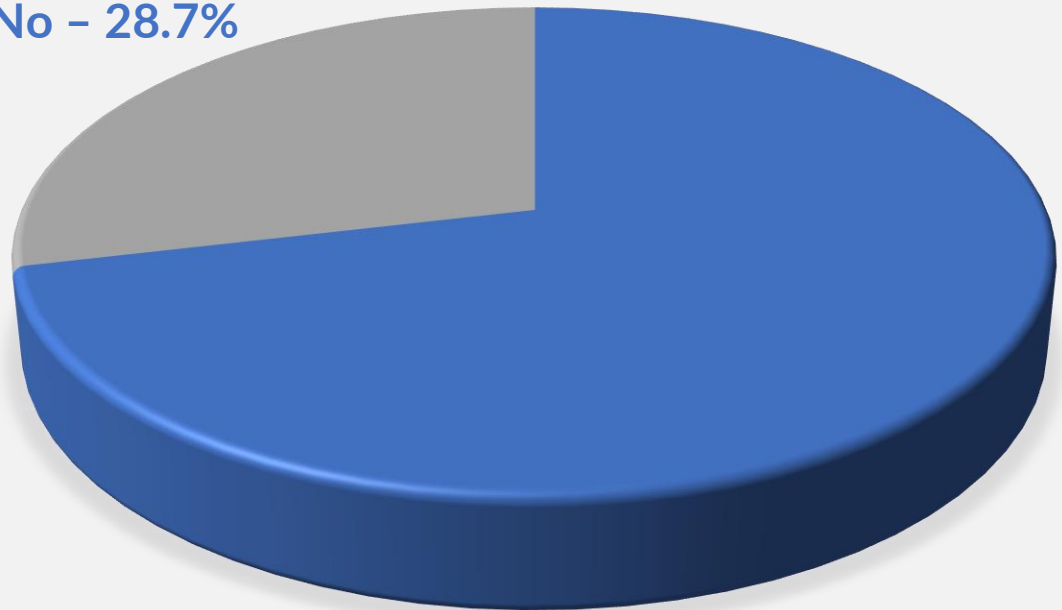
average number of
years the plan
covers

53.6%

review their plans
annually

PRIVATE CLUBS RELY ON STRATEGIC PLANS TO GUIDE THEIR DECISION MAKING

No – 28.7%



Yes – 71.3%



STRATEGIC PLANS

Without members, private clubs would not exist. Therefore, it is not surprising that the #1 strategic priority is to ensure members have a rewarding experience.

MEMBER SATISFACTION AND NEW AMENITIES TO ENHANCE THE EXPERIENCE ARE TOP PRIORITIES

STRATEGIC PRIORITIES	AVERAGE RANK
Member experience/satisfaction	1.61
Capital Spending for new improvements	2.63
Member recruitment/retention	3.56
Club Governance	3.82
Increased recreational amenities	4.62
Brand reach/strategic alignment	4.74

1= most important; 6 = least important



Key Insights

Brand & Communications



MEMBER COMMUNICATIONS

7.46

average rating of
the effectiveness
of member
communications

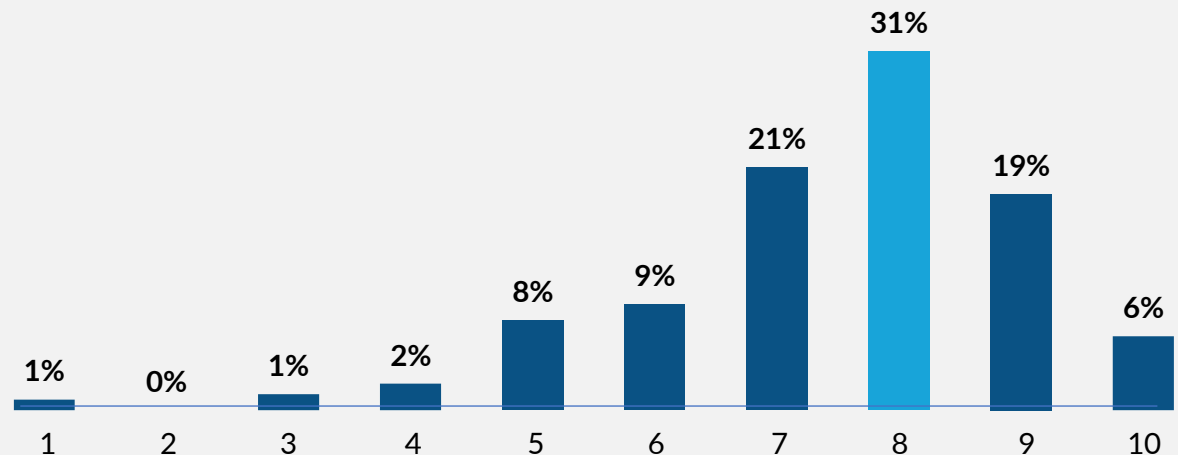
6%

rank their member
communications
as top tier

12%

rate their member
communications
5 or lower

MOST PRIVATE CLUB SURVEYED BELIEVE THEIR MEMBER COMMUNICATIONS ARE EFFECTIVE



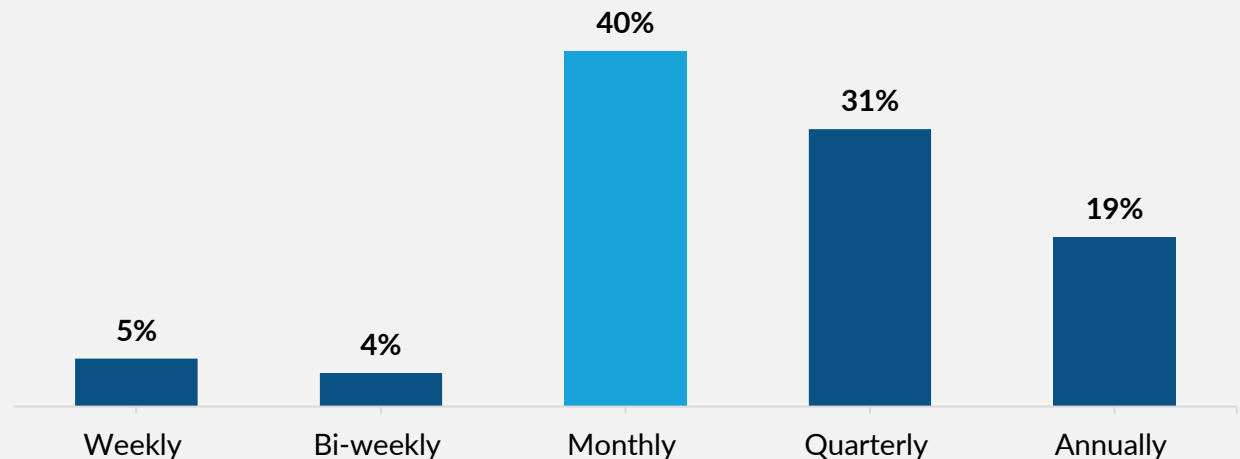
1 = least effective; 10 = most effective



BOARD COMMUNICATIONS

The majority of Club Boards are communicating with members on a more frequent basis to provide greater transparency.

FREQUENCY OF BOARD COMMUNICATIONS TO MEMBERS

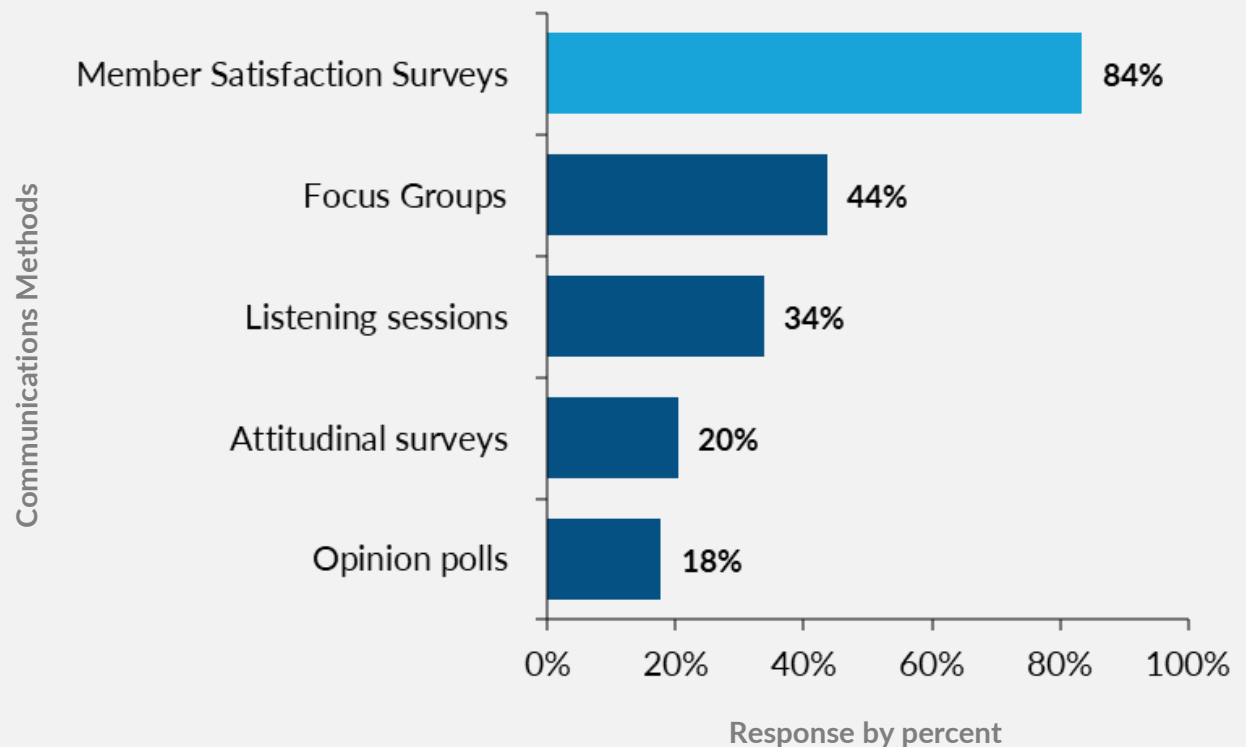




MEMBER COMMUNICATIONS

Private clubs are active in learning how members perceive their Club and the experience/value equation through surveys, focus groups and listening sessions.

CLUBS USE A VARIETY OF COMMUNICATIONS TO MONITOR MEMBER PERCEPTIONS OF BRAND & VALUE





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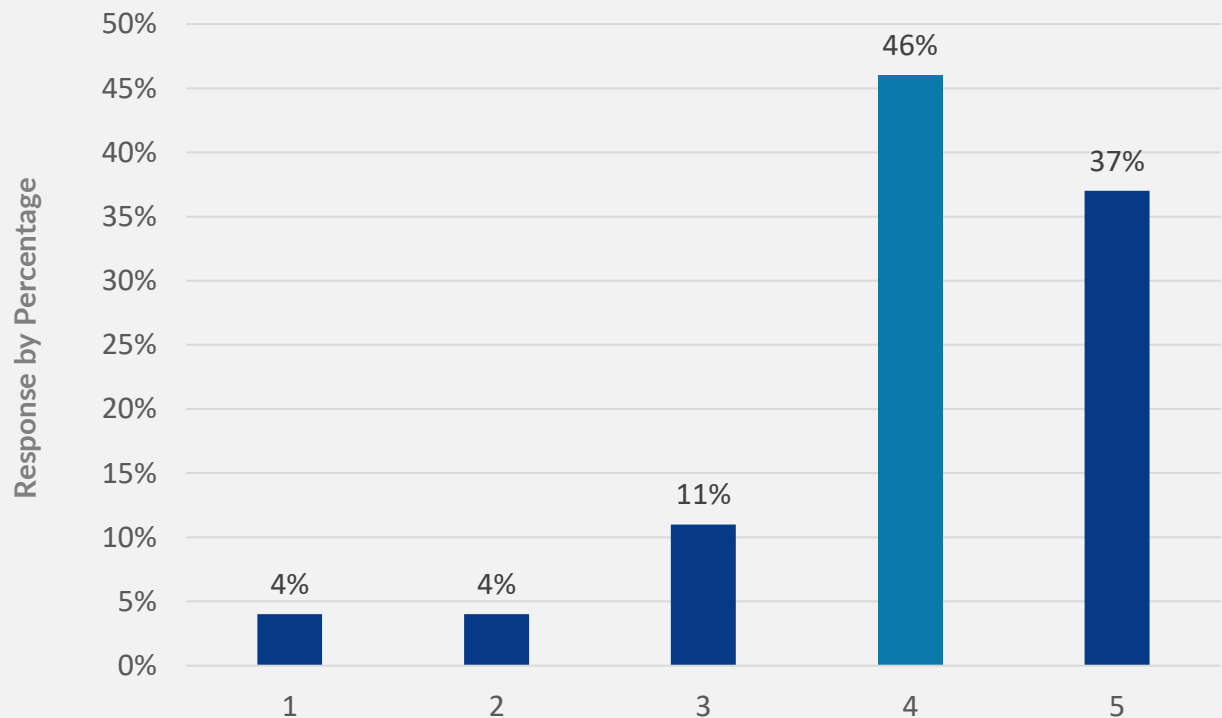


TREND ANALYSIS

83%

of respondents
rank Key Trend
analysis and
dissemination as
information very or
most important for
NCA to provide.

STAYING ABREAST OF KEY TRENDS IS IMPORTANT TO BOARD MEMBERS AND CLUB MANAGERS



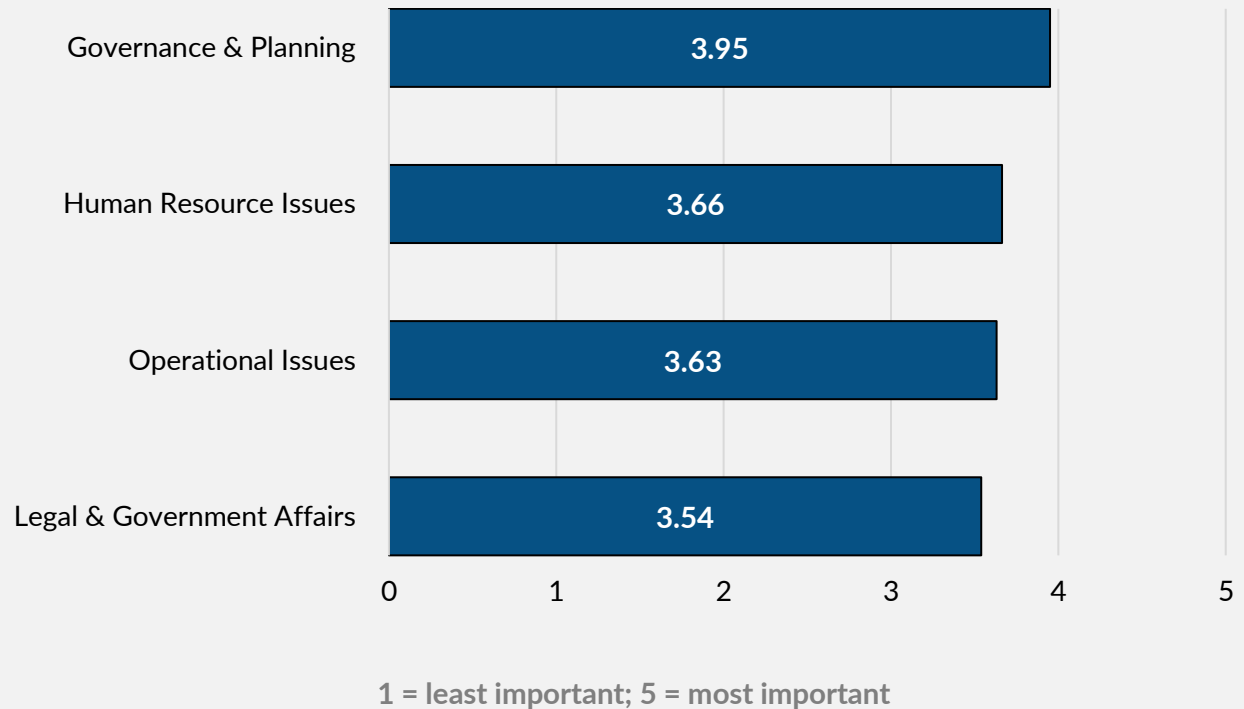
1= least important; 5 = most important



PUBLICATIONS

Club managers want to stay informed about best practices for governing boards, managing employees, operations, legal and government affairs.

CLUB MANAGERS WANT REFERENCE TOOLS TO ASSIST IN FOUR KEY AREAS

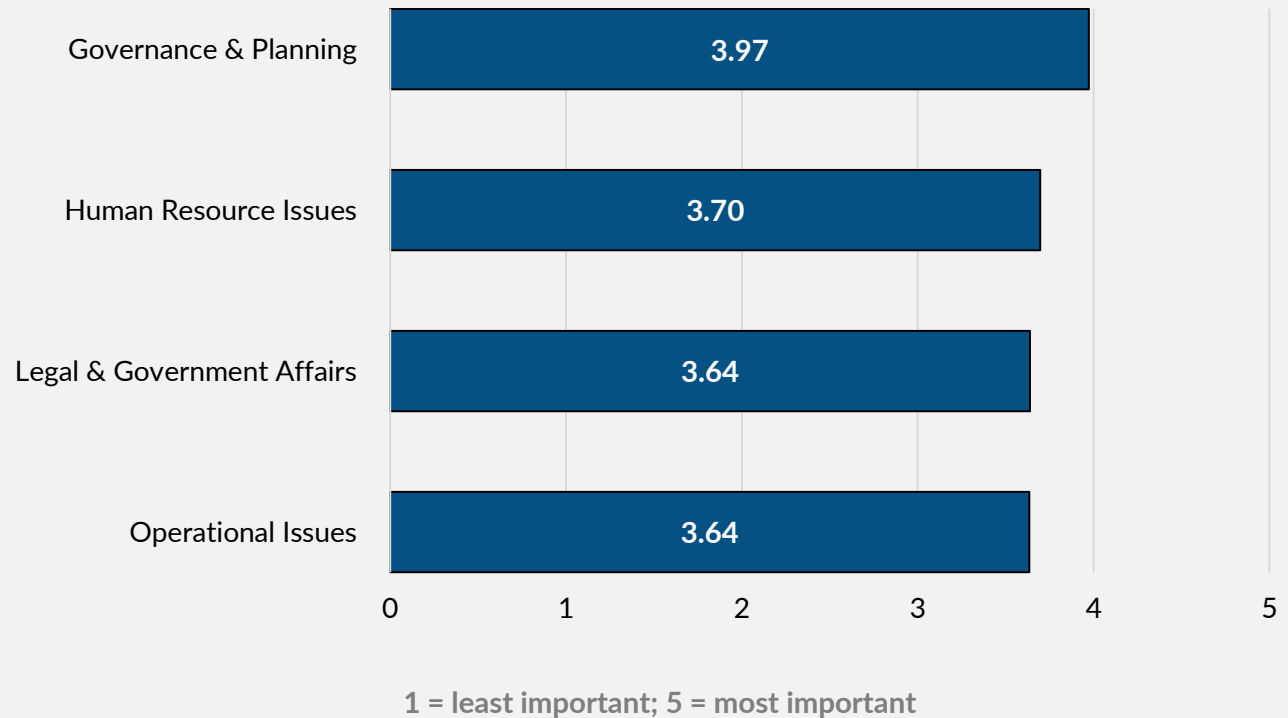




TRAINING

NCA members
desire additional
education to
perform at optimal
levels of success.

CONTINUING EDUCATION IS IMPORTANT FOR CLUB MANAGERS TO SUCCEED





IMPORTANT TOPICS

NCA Members want to stay abreast of trends and best practices across all aspects of Club business with governance and staffing deemed most critical.

THE TOP 5 MOST IMPORTANT TOPICS FOR NCA TO ADDRESS IN THE NEAR TERM

1	Club Leadership & Board Governance
2	Workforce & Labor Issues
3	Private Club Trends & Operations
4	Using Technology to Enhance Operations & Member Experience
5	Strategic Planning

Connect With Us

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GGA Partners™ is an international consulting firm and trusted advisor to many of the world's most successful golf courses, private clubs, resorts and residential communities. We are dedicated to helping owners, asset managers, club and community leaders, investors and real estate developers tackle challenges, achieve objectives and maximize asset performance.

Established in 1992 as the KPMG Golf Industry Practice, our global team of experienced professionals leverage in-depth business intelligence and proprietary global data to deliver impactful strategic solutions and lasting success.

ggapartners.com



For nearly 60 years, the National Club Association (NCA), a Washington, D.C.-based trade association, has provided private clubs with a voice on Capitol Hill. NCA is the only organization dedicated to advancing the legislative, legal and regulatory interests of private clubs throughout the United States.

NCA also supports members by providing a comprehensive collection of resources, unmatched insights into innovations and trends affecting the club industry, and high-value learning and networking experiences that help club leaders to effectively manage and govern their clubs.

nationalclub.org



Disclaimer

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